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MEDIA SURVEY REPORT: KYRGYZSTAN



Audience Analysis & Market Profile

November-December 2008

Media Report • 3656/09

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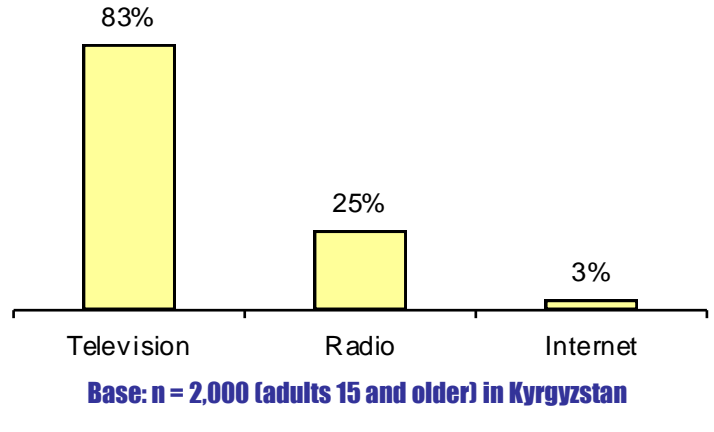
Project Manager: Mark Rhodes

This report, prepared for OSC by InterMedia, presents results of an InterMedia national survey of adults (15 and older) in Kyrgyzstan. InterMedia commissioned Inforex, which conducted 2,000 interviews from 10 November to 5 December 2008. Given a sample of this size, the range of error with a 95 percent confidence interval would be $\pm 2.2\%$. The data presented in this paper has been funded through the U.S. Broadcasting Board of Governors (BBG) International Audience Research Project and is provided through agreement with the BBG.

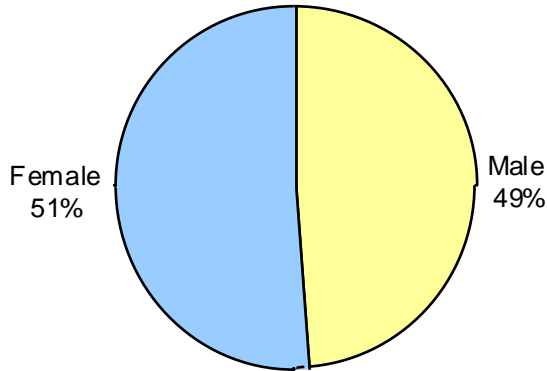


- The relatively wide media freedom experienced in Kyrgyzstan since the 2005 Tulip revolution narrowed this year. This coincided with local elections and associated internal political turmoil. Laws restricting free and independent media remain in force from previous years.
- Television continues to dominate the media landscape, with 97 percent of Kyrgyz speakers reporting they use the medium on a weekly basis for news and information. Friends and family are the next-most-used source, with 89 percent of Kyrgyz speakers relying on them weekly for news and information.
- The use of radio for news and information dropped (from 46 percent in 2006 and 2007 to 40 percent in 2008). Newspapers are now used as often as radio (41 percent of Kyrgyz speakers surveyed reporting using this platform on a weekly basis).
- Internet use inched up among Kyrgyz speakers from 5 percent in 2006 to 6 percent in 2008. Although the change in internet use is not statistically significant, the use of SMS for news and information about current events is something to watch: whereas just over one-quarter (27 percent) of respondents reported using SMS as an information source weekly in 2007, that figure increased to one-third (34 percent) of Kyrgyz speakers in 2008.
- One significant development that has taken place since the 2005 Tulip Revolution is the growth of the blogger community in Kyrgyzstan which continues to be active.
- In 2008, the media in Kyrgyzstan began to report increasing dissatisfaction with prices for essential goods, severe energy shortages, and dissatisfaction with the government's ability to manage these difficulties. Satisfaction with the economic situation in Kyrgyzstan has descended to approximately the same levels as the year of the Tulip Revolution, with only 30 percent indicting they are "very" or "somewhat" satisfied with the economic situation in Kyrgyzstan.
- The regional differences here are very strong: in the north, 45 percent are very or somewhat satisfied compared with only 11 percent in the south. This may be due to disparities in wealth between the two regions.
- The latest press freedom ranking from Reporters Without Borders places Kyrgyzstan 111th out of 173 countries.

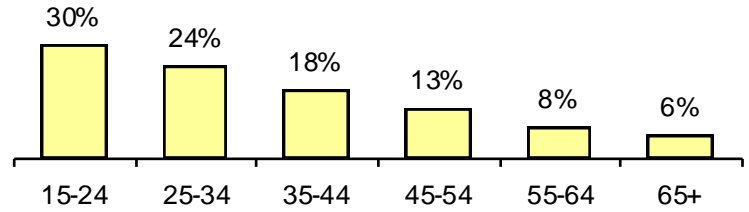
**Yesterday Media Use in Kyrgyzstan
(percent of adults using)**



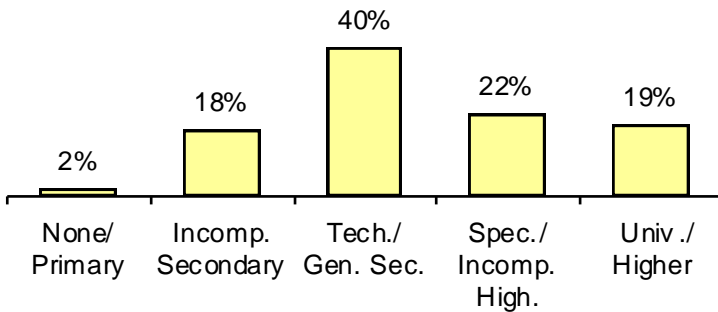
Sex



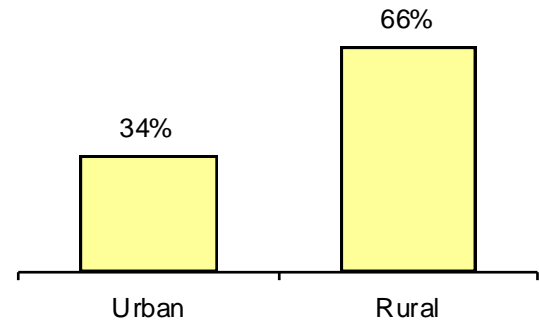
Age



Education



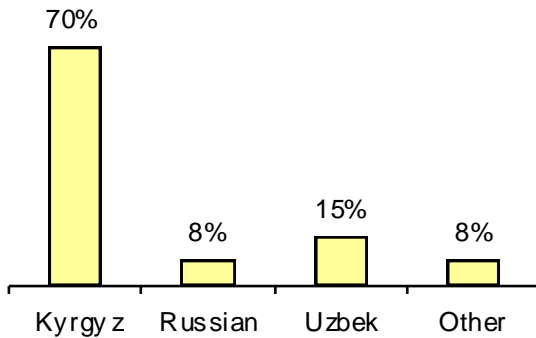
Urban/Rural



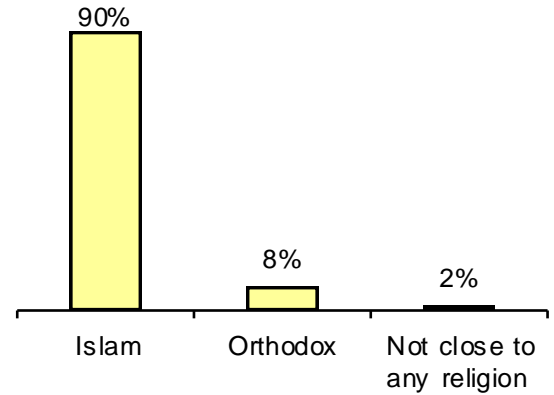
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Kyrgyzstan's population is evenly divided between men and women. It is relatively young, with more than one-half of respondents (54 percent) 34 or younger. The population is also relatively well educated; more than three-quarters of respondents (81 percent) have at least general secondary education and one in five (19 percent) have at least some university education. Two-thirds of respondents live in rural areas.

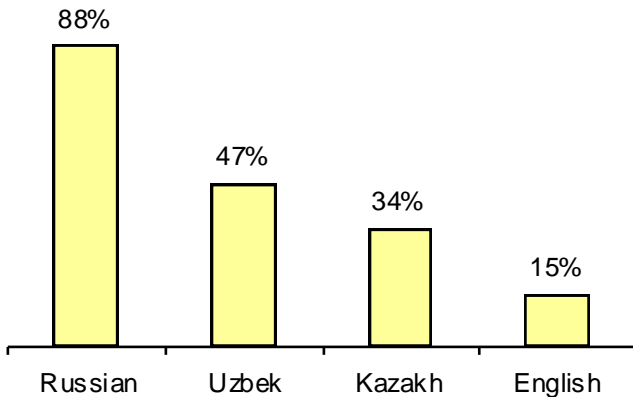
Nationality



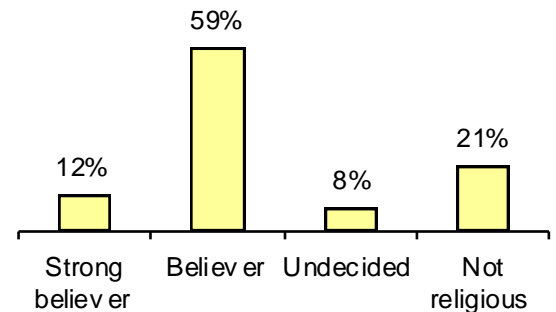
Religion



Foreign Language Knowledge



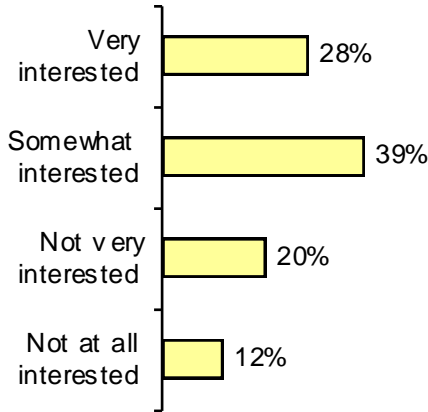
Relationship to Religion



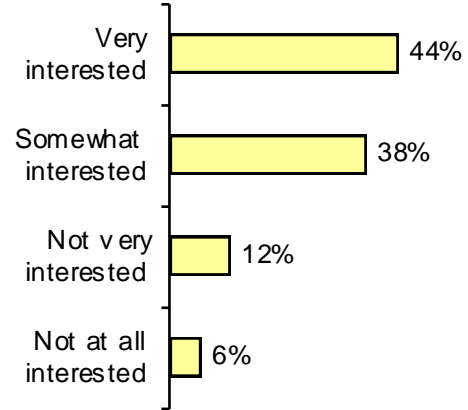
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- The population of Kyrgyzstan is predominantly Kyrgyz. Most speak Kyrgyz at home but almost nine in 10 (88 percent) of respondents understand Russian well enough to understand most or all of a radio broadcast. Uzbek is also widely spoken (47 percent).
- The vast majority of respondents are Muslim. Of the remaining 10 percent, most are Orthodox. Almost three in 10 (29 percent) describe themselves as either undecided about religion or not religious; the remaining describe themselves as believers.

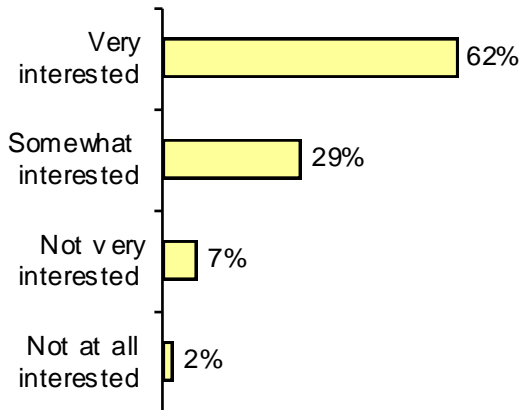
How interested are you in politics?



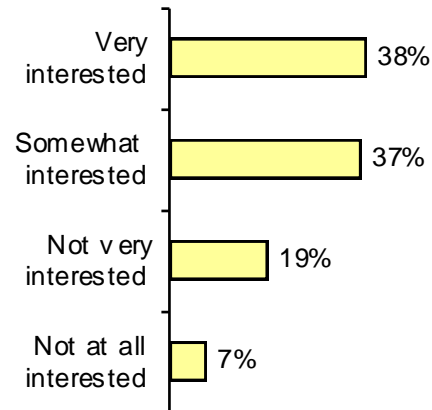
How interested are you in staying informed about current events in Kyrgyzstan?



How interested are you in news about Kyrgyzstan?



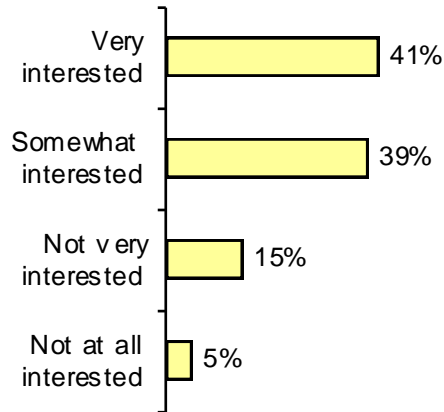
How interested are you in international news?



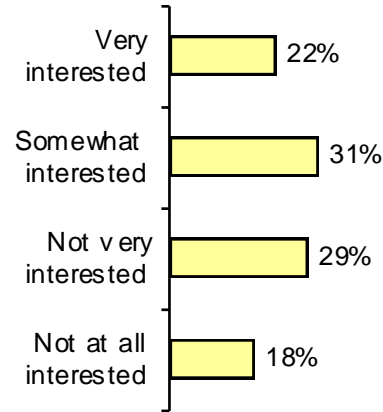
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Kyrgyz are most interested in knowing about what happens in their own country, with at least eight in 10 noting that they are interested in staying informed about current events (82 percent) and in learning news about Kyrgyzstan (91 percent). International news is also considered important.

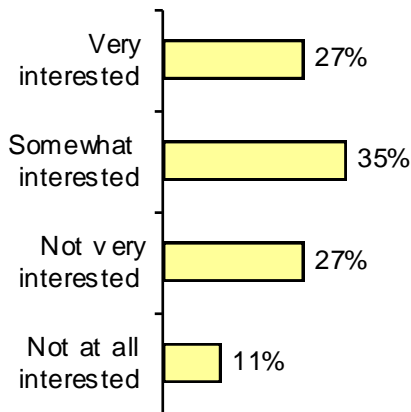
How interested are you in news about neighboring countries?



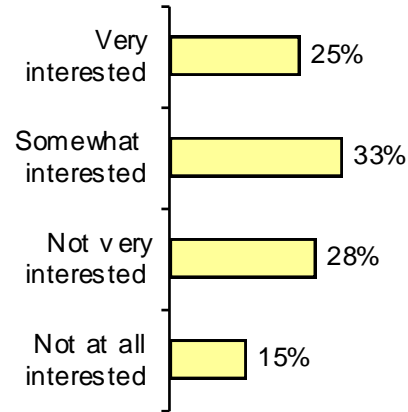
How interested are you in news about Germany?



How interested are you in news about Europe?



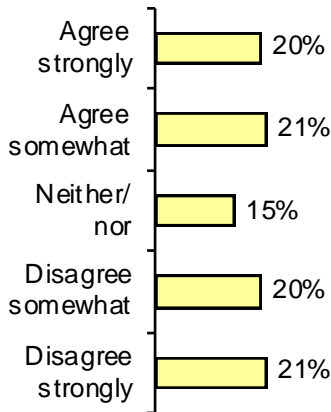
How interested are you in news about the United States?



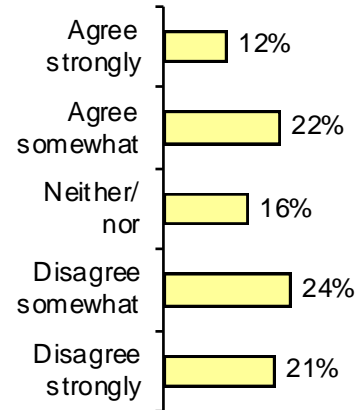
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Respondents professed to be interested in learning news about their neighbours (80 percent). When asked about more specific countries or regions, in contrast, respondents' professed levels of interests declined. Sixty-five percent are interested in learning news about Europe in general, compared with 53 percent who are interested in news about Germany. Slightly more respondents (58 percent) are interested in hearing news from the United States.

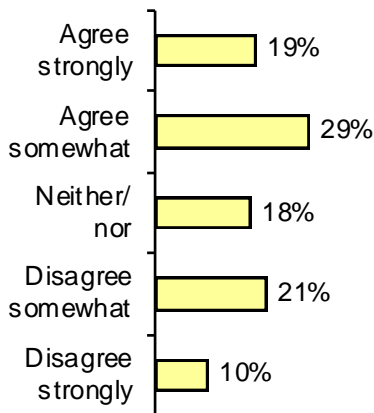
My interests are represented by the government?



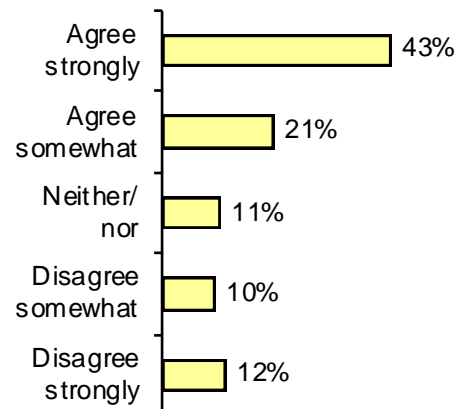
The current government has implemented an appropriate level of reform?



I have enough information about local and national news and current events?



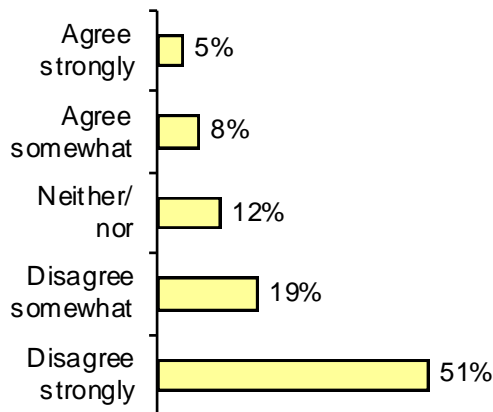
The government should control the activities of all radio, television and press?



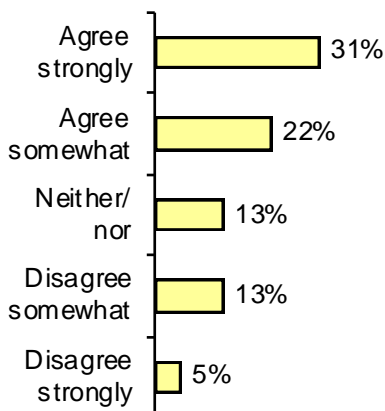
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Although half the population agreed that their interests were represented by the government in 2007, only 41 percent could agree this year. Even though President Bakiyev is from the south, and it was hoped he would represent the interests of the south, Kyrgyzstanis there are much more skeptical about this: more than half (53 percent) of those surveyed in the north agreed strongly or somewhat strongly with the statement that the government represents their interests, but only a quarter (24 percent) agreed strongly or somewhat strongly in the south.
- Almost one-half of respondents feel they receive enough information about news and current events. In addition, they agreed (and nearly one-half “agreed strongly”) with the statement that the government should control all media outlets.

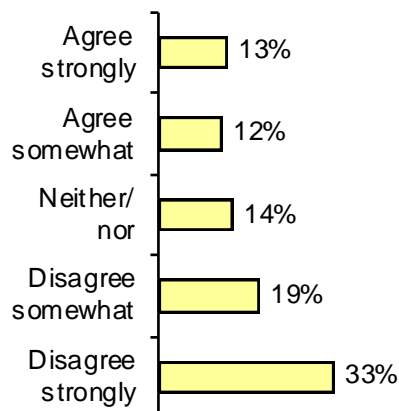
Kyrgyzstan should leave the CIS?



Kyrgyzstan should join the European Union?



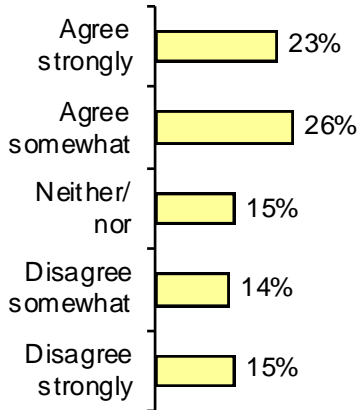
Kyrgyzstan should join NATO?



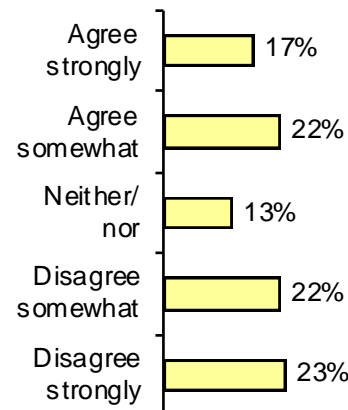
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- More than one-half (53 percent) believe Kyrgyzstan should join the European Union, but apparently not if this means leaving the Commonwealth of Independent States. More than two-thirds (70 percent) disagree with the proposition that Kyrgyzstan should leave the CIS, and more than one-half (51 percent) disagree strongly. Neither are they interested in joining NATO, a proposition with which one-half (51 percent) disagree and with which only one-quarter (25 percent) agree.

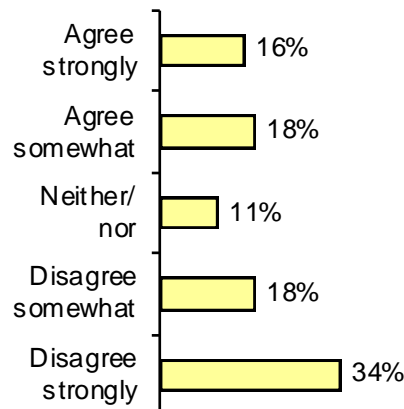
The United States has too much influence over our affairs?



Russia should have less influence over our affairs?



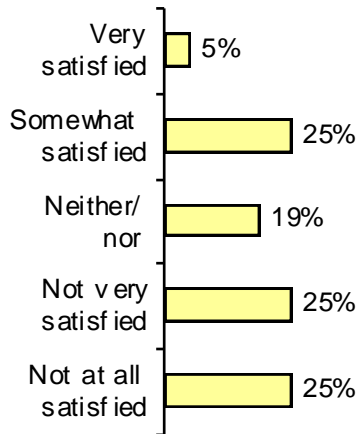
Kyrgyzstan should align itself more closely with China?



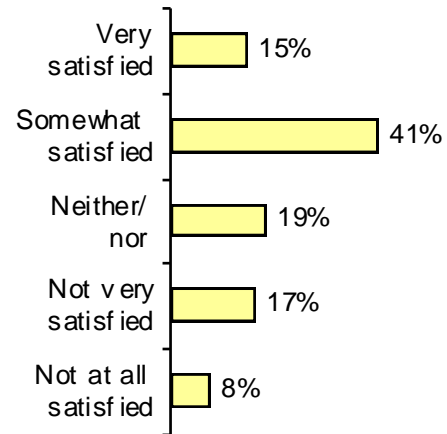
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- One-half the population agrees “strongly” or “somewhat strongly” with the statement that the United States has too much influence over Kyrgyzstan. Despite this, a majority are favorably disposed toward the United States (see p. 11). In contrast, they are evenly divided between those who believe Russia should have less influence and those who do not. Only about a third (34 percent), however, agreed strongly or somewhat strongly with the statement that Kyrgyzstan should align itself more closely with China.

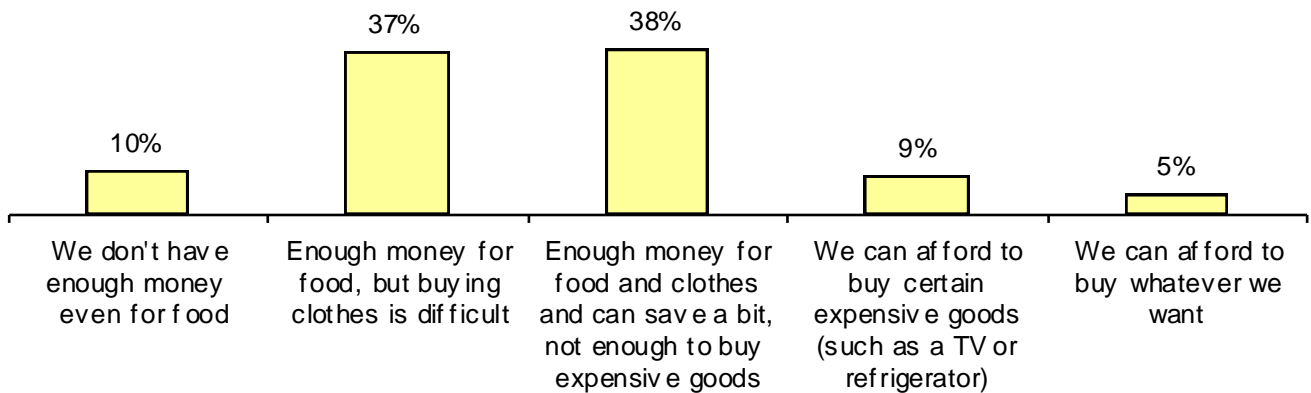
How satisfied are you with the economic situation in Kyrgyzstan ?



How satisfied are you with your own standard of living?



Income



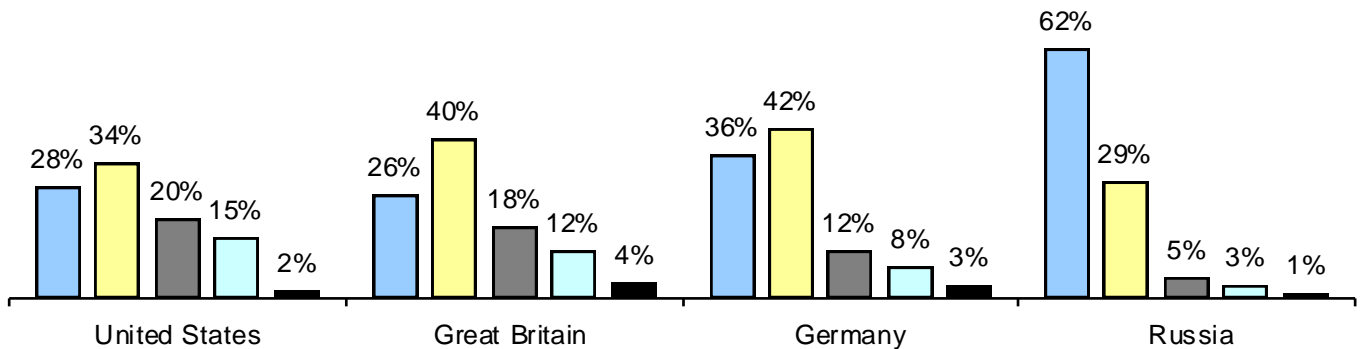
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- One-half of respondents expressed dissatisfaction with Kyrgyzstan's economic situation and 30 percent expressed satisfaction. Despite this somewhat negative take on the country's economic position, a majority (56 percent) are satisfied with their own standard of living. A similar proportion (52 percent) say they have enough money to buy what they need, if not everything they want. The other half (47 percent) struggle to get by.
- As an aside, more than one-third of respondents (40 percent) would prefer that Kyrgyzstan have a market economy; a little less than one-third (30 percent) prefer a planned economy. Another one-quarter (23 percent) prefer a mixed economy.

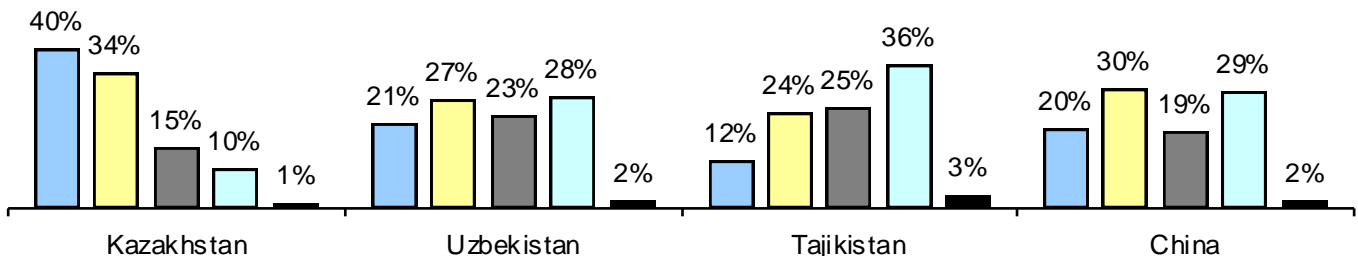


How favorably inclined are you toward the following countries?

■ Very favorably
 ■ Somewhat favorably
 ■ Somewhat unfavorably
 ■ Very unfavorably
 ■ DK/NS



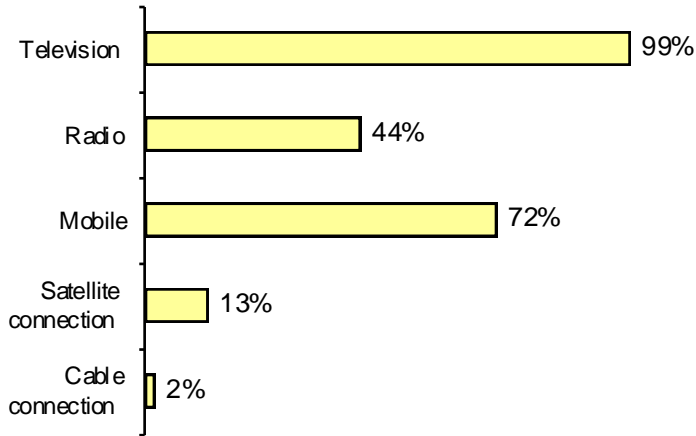
■ Very favorably
 ■ Somewhat favorably
 ■ Somewhat unfavorably
 ■ Very unfavorably
 ■ DK/NS



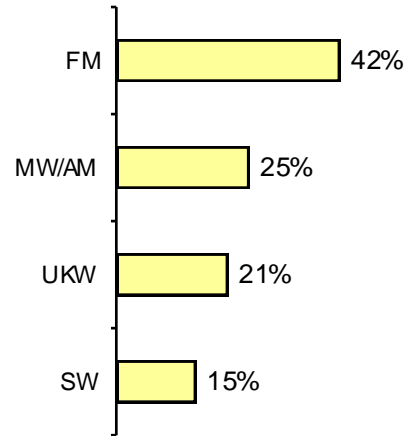
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Favorability toward the United States is relatively high, with two-thirds (66 percent) favorably inclined. Favorability towards Russia is even greater: the vast majority (92 percent this year) agreed with the statement that they are “very” or “somewhat” favorably inclined toward that country.
- As migration and investment between Kyrgyzstan and China continue, the Kyrgyz population is evenly split in their attitudes toward China: half indicated they are “very” or “somewhat” favorably inclined toward China and half said they are “very” or “somewhat” unfavorably inclined.

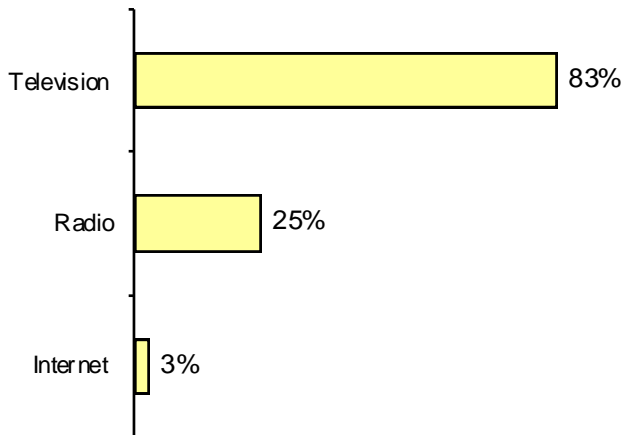
Ownership



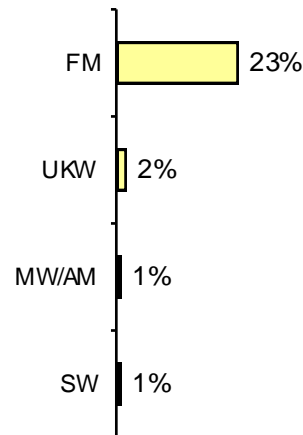
Access to Waveband



"Yesterday" Use



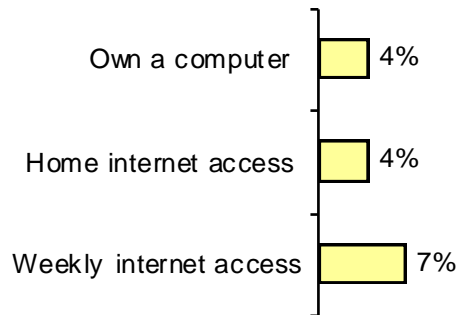
"Yesterday" Waveband Use



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Television ownership is essentially universal and has been for the previous four years. Radio ownership, in contrast, has been falling, from 68 percent in 2004 to 44 percent in 2008. Mobile telephone ownership or access has skyrocketed, from 13 percent in 2004 to 72 percent in 2008.
- Declining radio ownership (which includes car radios) is reflected in lower listening rates. Only one-quarter of respondents listened to radio “yesterday,” compared with more than eight in 10 who watched television. FM is the most popular waveband and is, essentially, the only band used.

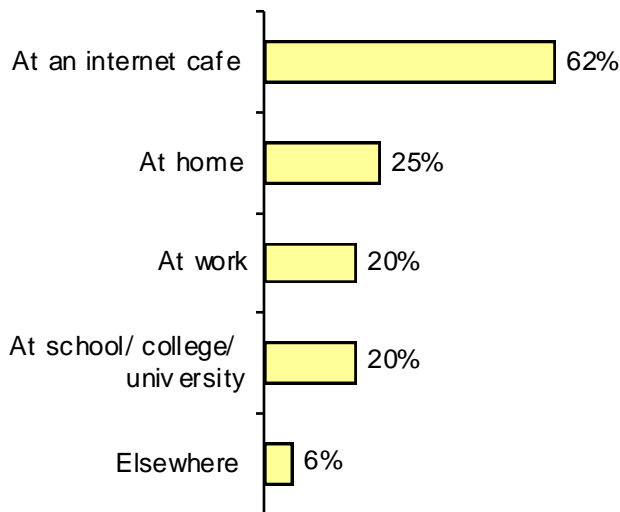
Computer Ownership/Internet Access and Use



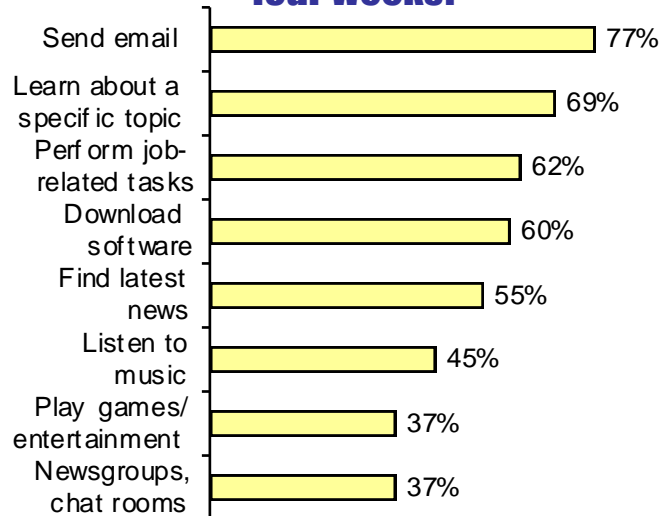
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

Internet Activity Among Users

Where most often used?



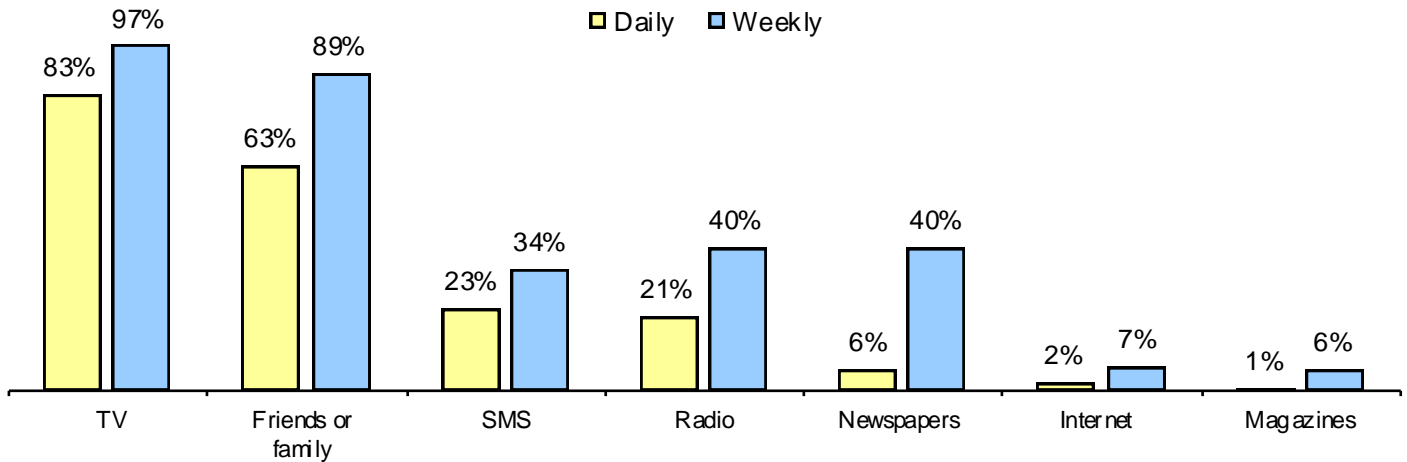
Which activities used in last four weeks?



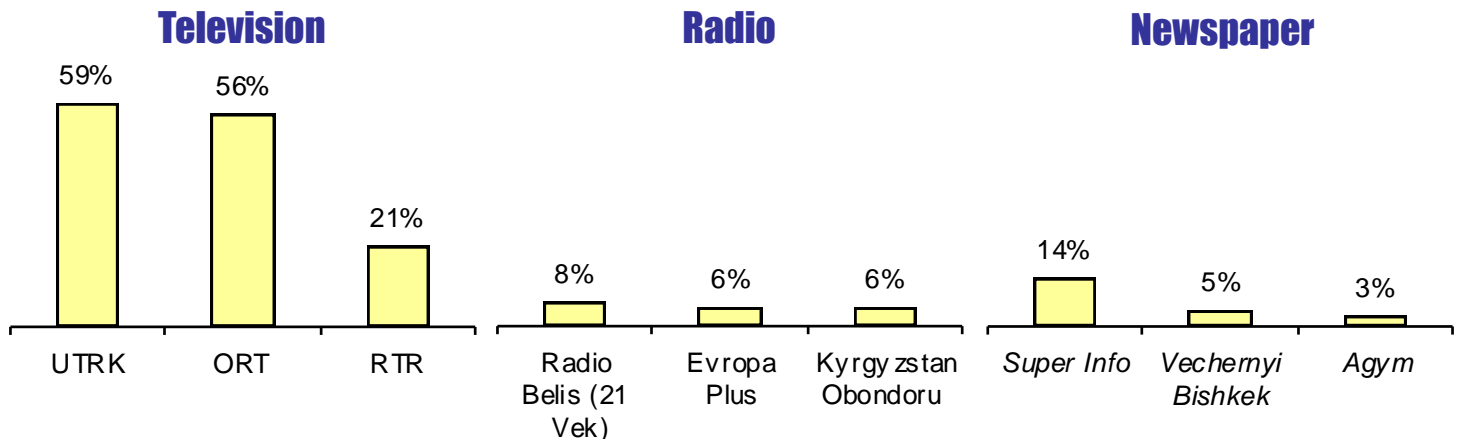
Base: n = 232 annual internet users (adults 15 and older) in Kyrgyzstan

- Personal computer ownership has not changed in the past four years; neither has internet access at home. Among those few respondents with internet access at home, most have dial-up connections, although one-third have access through their mobile telephones. Weekly internet access is less than one in 10 respondents.
- Most annual users of the internet use Russian when online. Only one in five (18 percent) of annual users access the internet daily or nearly everyday; 42 percent access the internet at least once a week.

How often do you use the following sources to get news about current events?



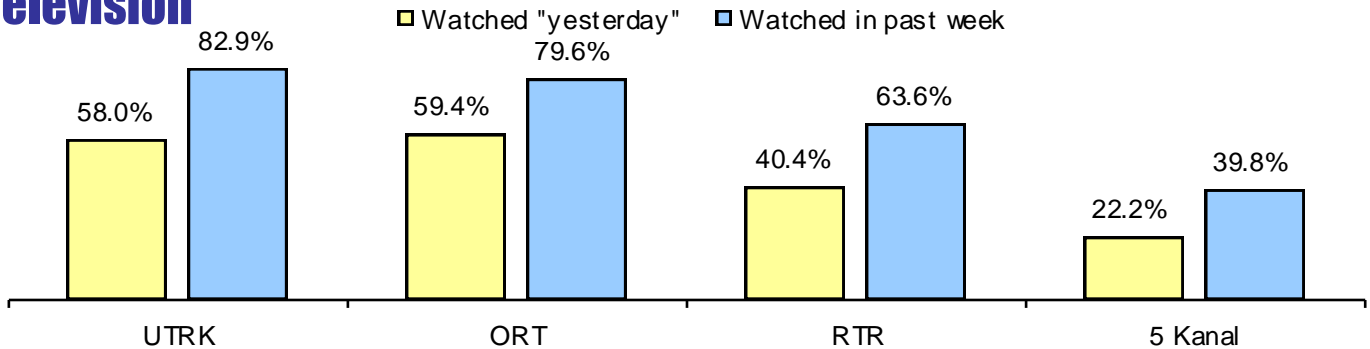
Which television stations, radio stations or newspapers are your most important sources of information?



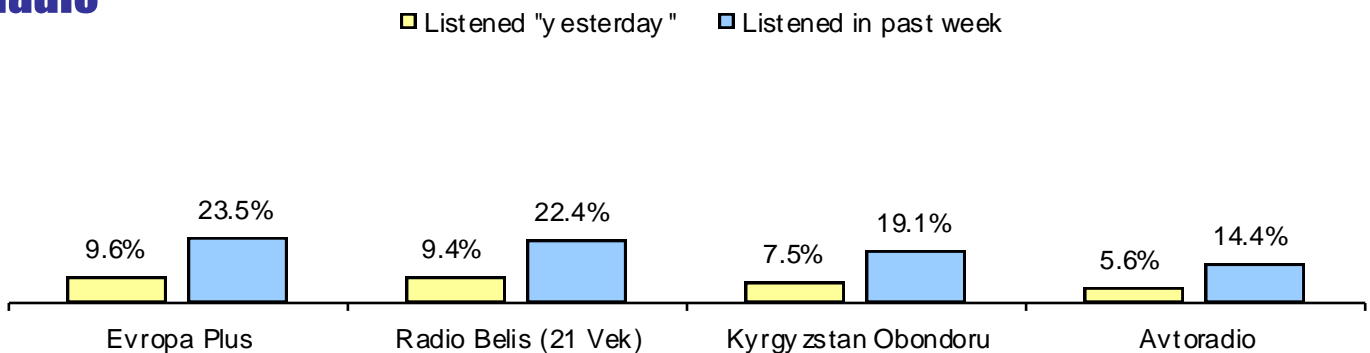
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Television is far and away the most important source of news and information for Kyrgyz, with more than three-quarters (83 percent) tuning to it daily for news and nearly all tuning in weekly. Friends and family are the second-most important source, which may contribute to the importance of SMS. Conventional media outlets such as radio stations and newspapers are much less important as daily sources of news, although four in 10 (40 percent) listen or read at least weekly for news.
- The three television stations, UTRK, ORT and RTR, are significantly more important as sources of information than are any other media outlets. Two more television stations, 5 Kanal and Uzbek TV, would also be listed ahead of the next-most important source, *Super Info*.

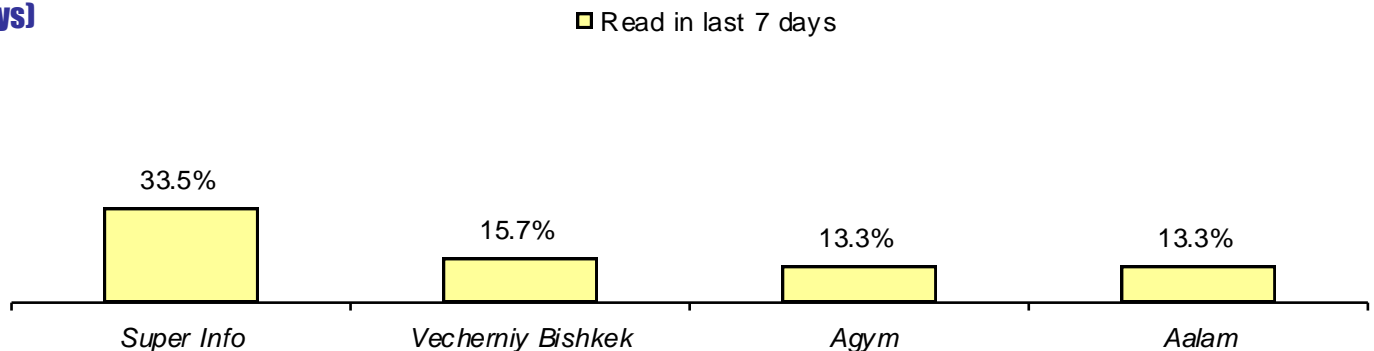
Television



Radio



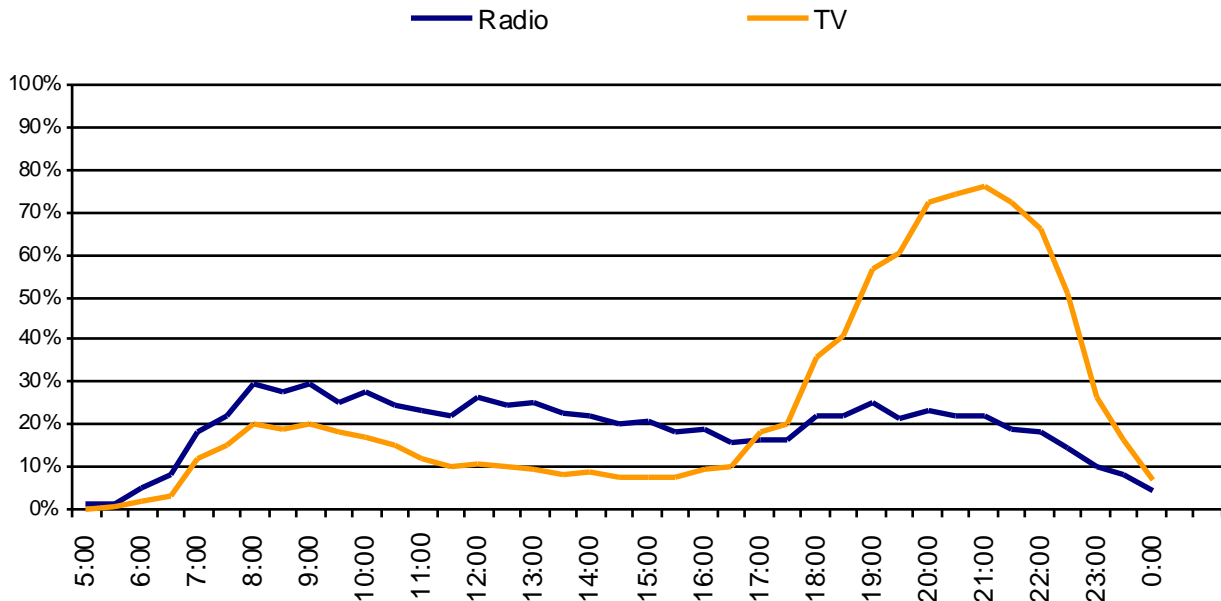
Newspapers (Read in the past 7 days)



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- The most important sources of news and information are also the most popular media outlets. The three most popular television stations are viewed at least weekly by two-thirds or more of respondents. In contrast, fewer than one-quarter of respondents listen to the most popular radio stations weekly. One-third of respondents read the most popular newspaper weekly, but readership is much lower for other newspapers.

TV/Radio Reach at Various Times of Day Percentage of Adults Listening/Viewing "Yesterday"



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- TV viewing is highest between 21:00 and 21:30 when 76 percent of the population is watching. Television viewing is low in the early morning hours, rises to 20 percent at 08:00 before declining to approximately 10 percent through most of the day.
- Radio listening is much more even throughout the day. It increases quickly in the morning as people wake up, then begins a long slow decline through the day. There is a slight pick-up in the early evening, as people return home from work, then listening renews its gentle decline.



- Television viewing remains high in Kyrgyzstan. With 83 percent “yesterday” viewing and 97 percent “weekly” viewing, no other platform comes close. UTRK, the state channel, remains the number one channel with 58.0 percent “yesterday” and 82.9 percent “weekly” reach among the general population. The channel is even more popular among Kyrgyz speakers, with 64.7 percent “yesterday” and 87.4 percent “weekly” reach.
- ORT, a Russian-owned channel with Russian-language content, is highly trusted and has the next highest reach. Some 92 percent of those surveyed consider the news and information on the channel at least somewhat trustworthy. UTRK is also considered highly trustworthy, with 86 percent rating the information as at least somewhat trustworthy.
- There have been notable changes in the television market: 5 Kanal rose from 23.6 percent weekly reach in 2007 to 39.8 percent. Similarly, ELTR’s weekly reach increased from 29.5 percent to 36.6 percent. Focus groups conducted by InterMedia in November and December 2008 pointed to these two channels as having significantly improved their programs over the last year.
- Although the vast majority of Kyrgyzstanis still receive their television signal by antenna, those who receive their television signal by satellite have grown from 7 percent in 2006 to 13 percent in 2008. Using cable for television is much less popular, at 2 percent. The percentage of people whose televisions receive their signal by satellite is clearly higher among Russian speakers: 17 percent of the Russian speakers surveyed receive their television signal by satellite, compared to 12 percent of Kyrgyz speakers. The use of television satellites also appears to be much higher in the north (49 percent) than in the south (33 percent) or east (18 percent). Yamal 201-C is by far the most popular satellite: 36 percent of those who received their television signal by satellite did so through this provider.

Rank	Station	Yesterday Reach	Weekly Reach
1	UTRK	58.0	82.9
2	ORT	59.4	79.6
3	RTR	40.4	63.6
4	5 Kanal	22.2	39.8
5	ELTR	19.7	36.6
6	Uzbek TV	18.8	27.9
7	Pyramida	14.1	24.9
8	NTV	13.0	23.4
9	STS	12.4	22.8
10	NBT	13.0	22.1
11	NTS	10.0	18.4
12	MTV	8.9	17.1
13	Osh TV	9.6	16.7
14	KTK	5.8	13.1
15	Azattyk	0.7	9.5

Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information? (Respondents were allowed to name three sources)

Rank	Station	First choice as most important	Total (selected as one of three most important sources)
1	UTRK	37	59
2	ORT	26	55
3	RTR	2	21
4	5 Kanal	6	16
5	Uzbek TV	6	14
6	ELTR	3	11
7	Pyramida	2	5
8	NBT	2	5
9	STS	1	3
10	Azattyk	0	3

How reliable do you think the news and information on (channel) is?

Rank	Station (yesterday reach)	percent annual viewers rating station's news as very trustworthy/ somewhat trustworthy
1	ORT (59.4)	82
2	UTRK (58.0)	77
3	RTR (40.4)	69
4	5 Kanal (22.2)	40
5	ELTR (19.7)	36
6	Uzbek TV (18.8)	24
7	STS (12.4)	24
8	NBT (13.0)	21

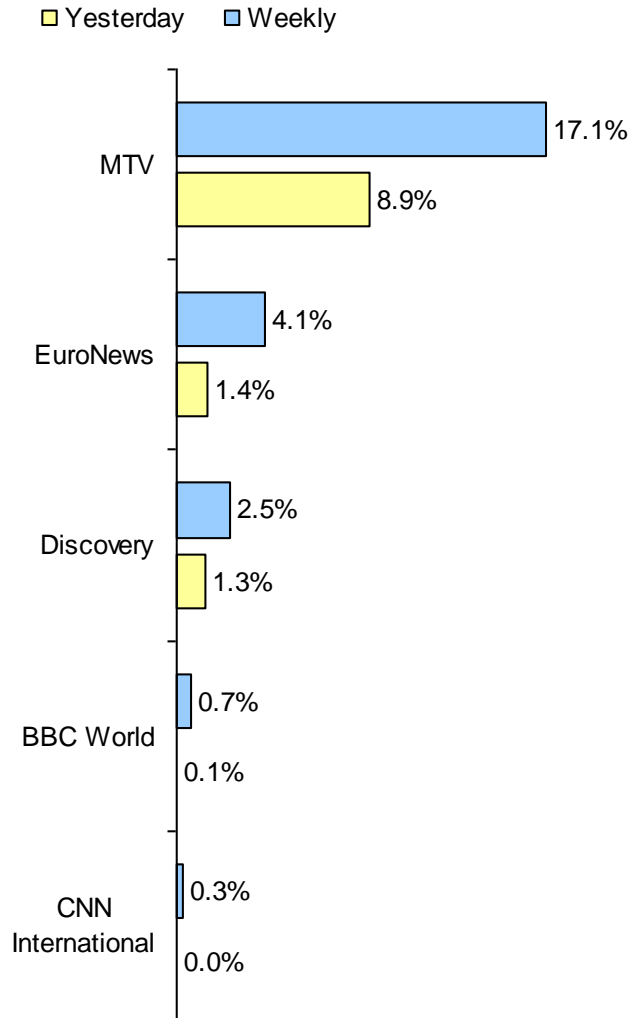
Which kind of antennas do you have to receive foreign TV? (percent adults 15+)

- Only 13 percent of respondents report owning a satellite dish, and an even smaller proportion report having cable access.
- More than one-half of respondents (56 percent) have access to between one and six channels, and another one-quarter (26 percent) have access to between seven and 13 channels.
- Among satellite owners, the most widely used satellite is Yamal 201-C, followed by Yamal 201-Ku.



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

International TV Stations' Nationwide Reach

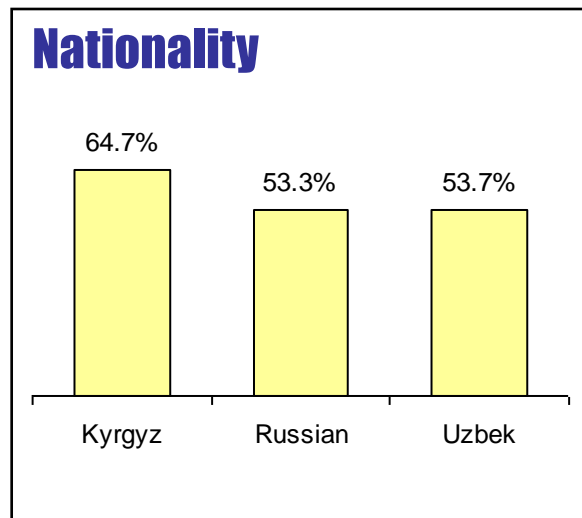
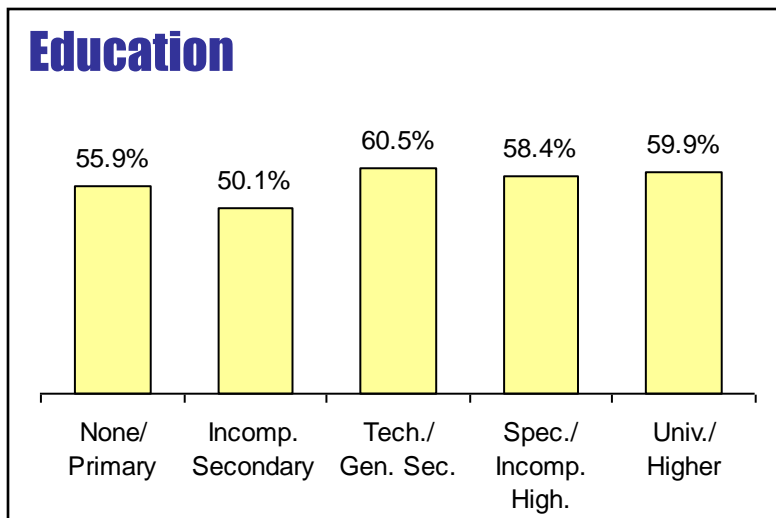
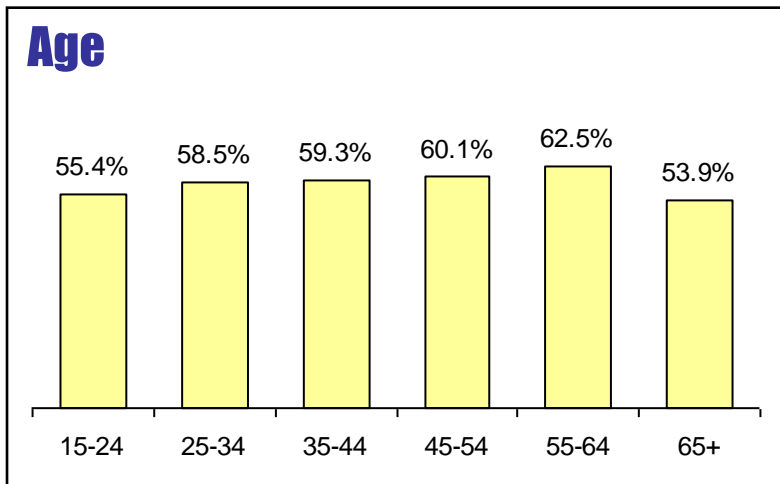
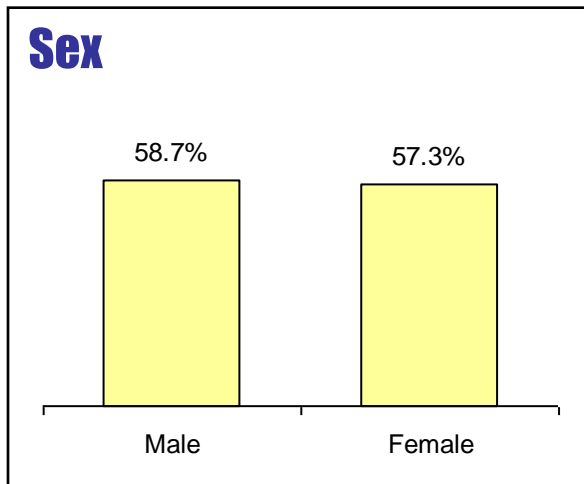


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- International television is not widely popular in Kyrgyzstan. MTV, the music television station, attracted more viewers “yesterday” than any other international television broadcaster attracted in a week. News broadcasters, such as BBC, attract even fewer viewers, although EuroNews is the second-most popular international broadcaster.

UTRK Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 58.0%

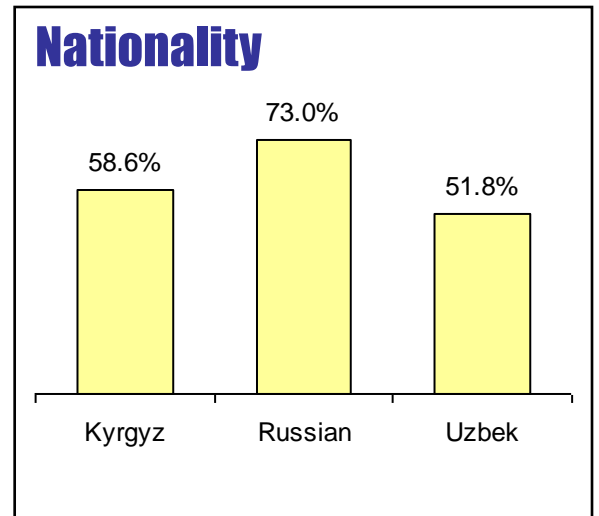
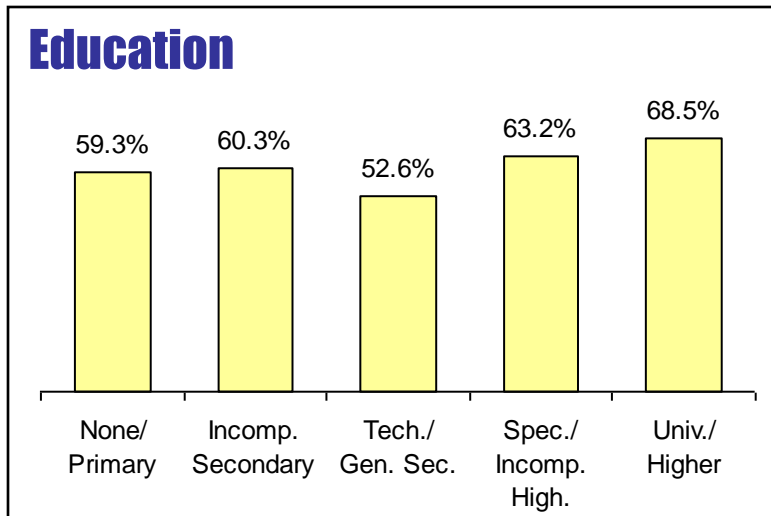
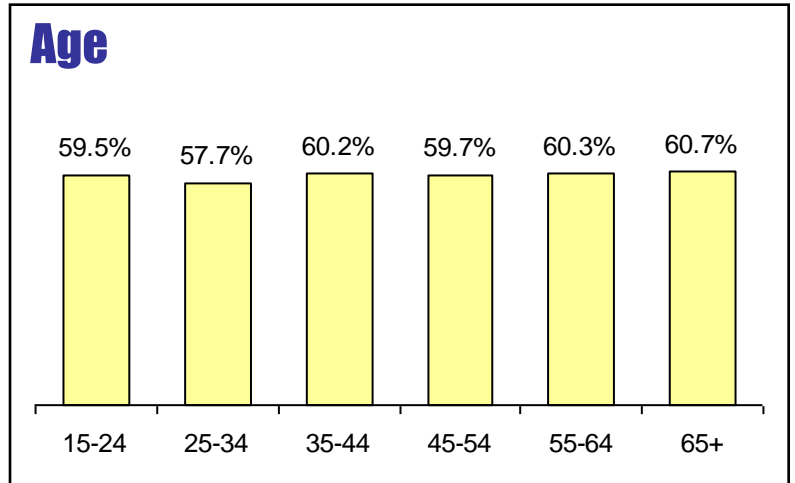
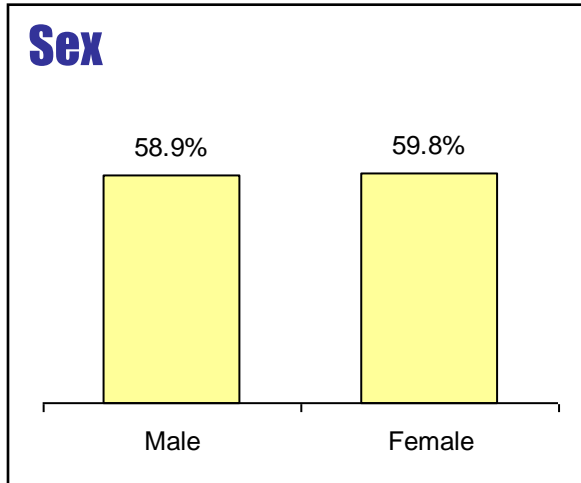


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- The Kyrgyz National TV and Radio Broadcasting Corporation is a state-run broadcaster with two networks. Its television broadcasts attract viewers from most demographic segments, although viewership among Kyrgyz is higher than it is among Russians and Uzbeks.
- The broadcaster's "yesterday" and weekly reach figures have dropped since 2005, falling from 69.1 percent "yesterday"/94.4 percent weekly to 58.0 percent "yesterday"/82.9 percent weekly in 2008.

ORT Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 59.4%

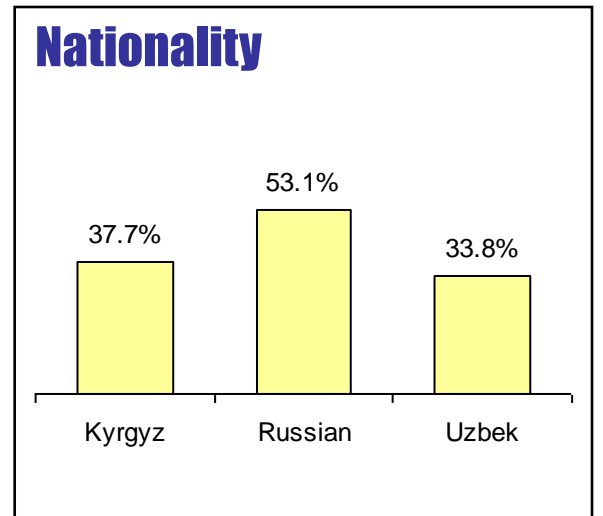
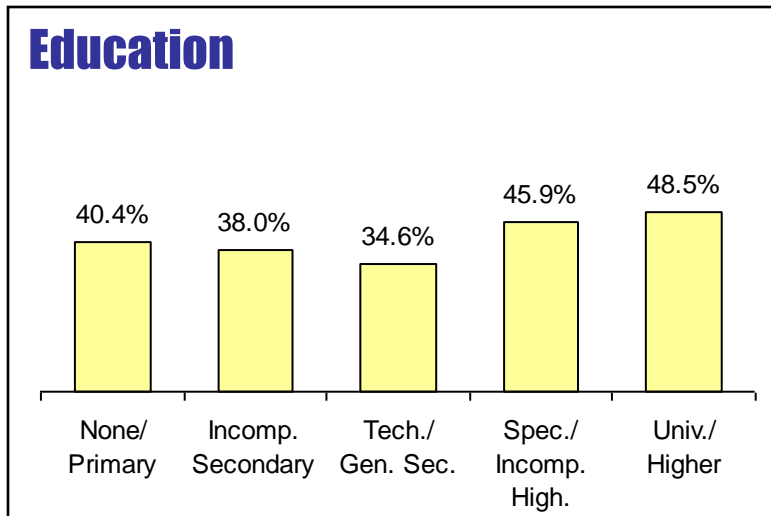
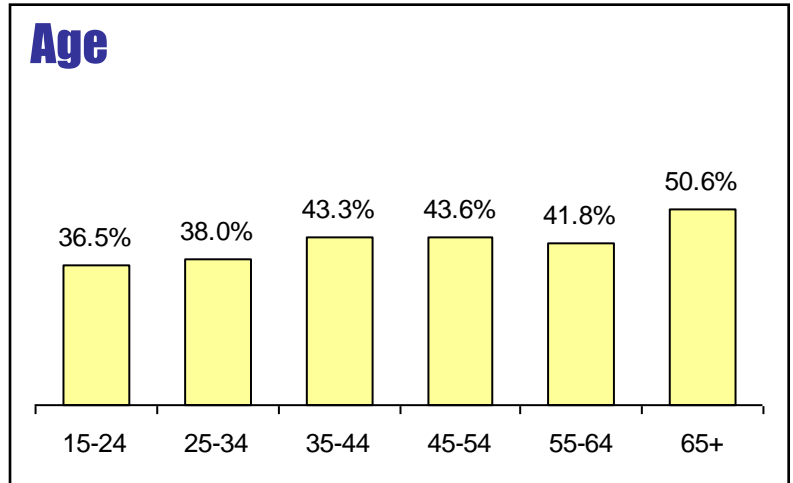
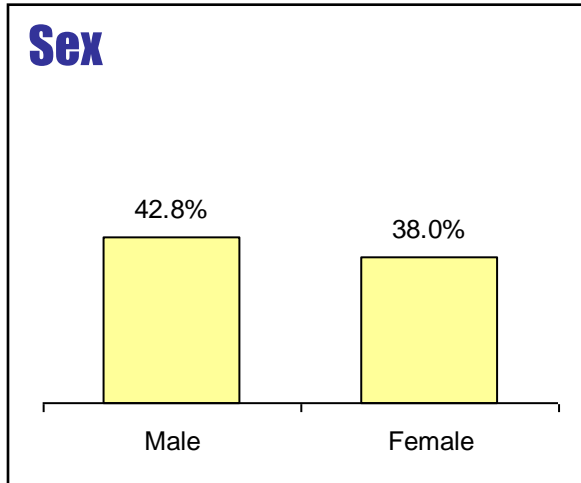


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- ORT is a state-owned Russian television broadcaster based in Moscow. It also attracts viewers in relatively equal proportions from all demographic segments, although Russians are more likely to watch “yesterday” than were Kyrgyz or Uzbeks.
- The broadcaster’s “yesterday” and weekly reach figures have declined since 2005, falling from 63.4 percent “yesterday”/85.0 percent weekly to 59.4 percent “yesterday”/79.6 percent weekly in 2008.

RTR Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 40.4%

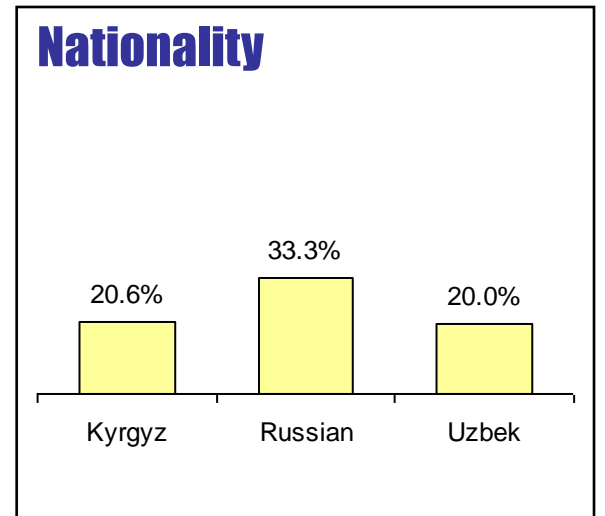
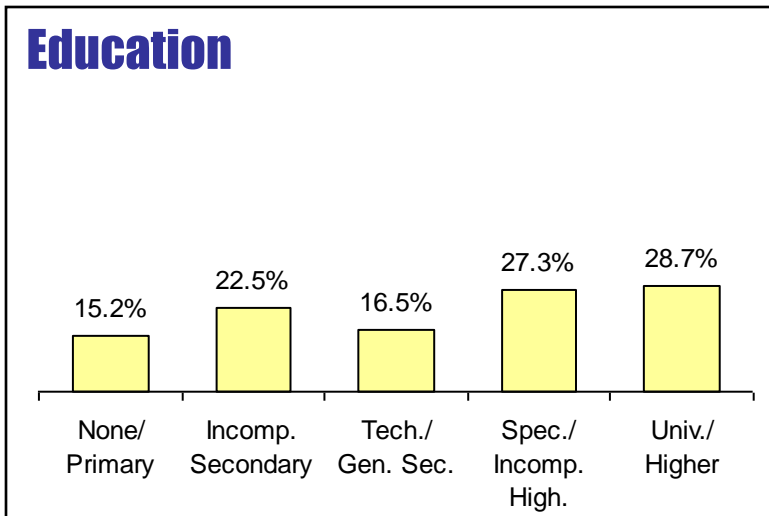
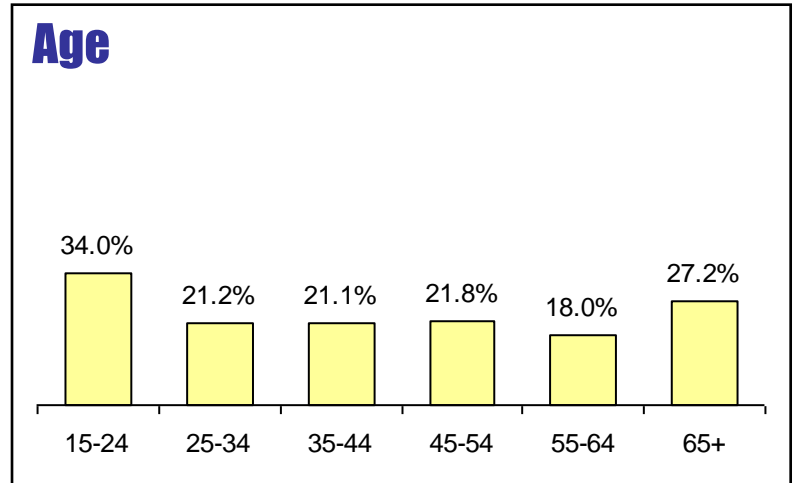
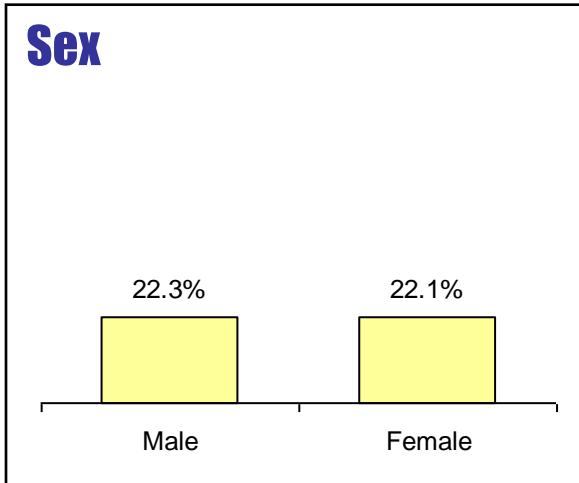


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- RTR is another state-owned Russian television broadcaster. It is more popular among better-educated and older respondents. Like ORT, it is more popular among Russians than among Uzbeks and Kyrgyz.
- The broadcaster's "yesterday" and weekly reach figures have declined since 2005, falling from 52.9 percent "yesterday"/71.8 percent weekly to 40.4 percent "yesterday"/63.6 percent weekly in 2008.

5 Kanal Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 22.2%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- The station attracts a mix of viewers, including the youngest and oldest. It is more popular with Russians.
- 5 Kanal viewers are the least favorably inclined toward the United States.

How favorably or unfavorably inclined are you personally toward the United States?

Rank	Station (Number of yesterday viewers)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,000)	28	34	20	15	2
1	TV 3 (111)	40	34	13	11	1
2	STS (249)	36	32	22	8	2
3	NTS (210)	36	32	20	9	2
4	TNT (145)	36	31	21	11	2
5	Uzbek TV (353)	35	28	18	16	3
Bottom 5						
1	5 Kanal (451)	25	33	26	13	3
2	Rossiia (RTR) (829)	28	33	23	14	2
3	MTV (168)	28	38	22	10	2
4	Pyamida (290)	29	31	26	12	2
5	Osh TV (180)	29	32	17	18	3

- The table shows attitudes toward the United States by yesterday viewers of TV broadcasters.
- The stations are ranked by the percentage of "very favorable" responses among viewers; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.



- Radio use is declining in Kyrgyzstan: whereas nearly four in 10 respondents (38 percent) in 2005 said they listened to radio daily (and two-thirds—67 percent—weekly), in 2008 these numbers had fallen to 25 percent and 48 percent, respectively. In addition, whereas one-third (33 percent) tuned to radio daily for news and information (57 percent weekly) in 2005, in 2008 these numbers had also fallen, to 21 percent and 40 percent, respectively.
- Evropa Plus has traded places with Radio Belis (formerly 21 Vek) as the top station, but the difference between their reaches is not statistically significant. On the whole, radio listening is disproportionately high in Bishkek: of those who listened “yesterday,” almost one-quarter (24) are located in Bishkek (as opposed to 15 percent of the general population).
- Technological developments have yet to be reflected in radio listening in Kyrgyzstan. Satellite radio and listening to radio on the internet are both less than 1 percent weekly. Western FM continues as the preferred waveband for radio listeners, with 23 percent “yesterday” and 45 percent weekly reach. No other waveband approaches these numbers. Shortwave had 0.5 percent “yesterday” and 2 percent weekly reach.



Rank	Station	Yesterday Reach	Weekly Reach
1	Evropa Plus	9.6	23.5
2	Radio Belis (21 Vek)	9.4	22.4
3	Kyrgyzstan Obondoru	7.5	19.1
4	Avtoradio	5.6	14.4
5	Russkoe Radio	4.6	13.3
6	Hit FM	3.9	9.9
7	Kyrgyzskoe Radio 1	3.1	8.2
8	Min Kyial	2.7	7.8
9	Radio Almaz	2.9	7.6
10	Pyramida	2.4	6.5
11	Vodiy Sadosi	2.6	5.4
12	Radio Azattyk	1.6	8.4
13	Love Radio	1.6	4.9
14	Radio Shanson	1.5	4.3
15	Radio Almaz Yug	1.4	4.0

Base: n = 2,000 (adults 15 and older) in Kyrgyzstan



Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information? (Respondents were allowed to name three sources)

Rank	Station	First choice as most important	Total (selected as one of three most important sources)
1	Radio Belis (21 Vek)	2	8
2	Evropa Plus	1	6
3	Kyrgyzstan Obondoru	1	6
4	Radio Azattyk	1	6
5	Vodiy Sadosi	0	2
6	Russkoe Radio	0	1
7	Hit FM	0	1
8	Kyrgyzskoe Radio 1	0	1
9	Avtoradio	0	1
10	Pyramida	0	1

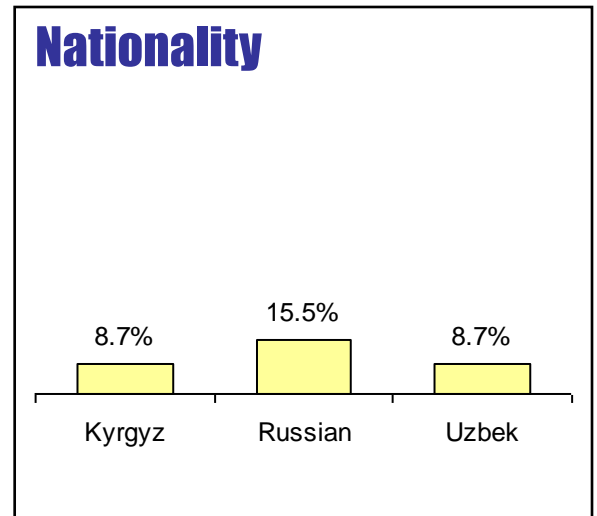
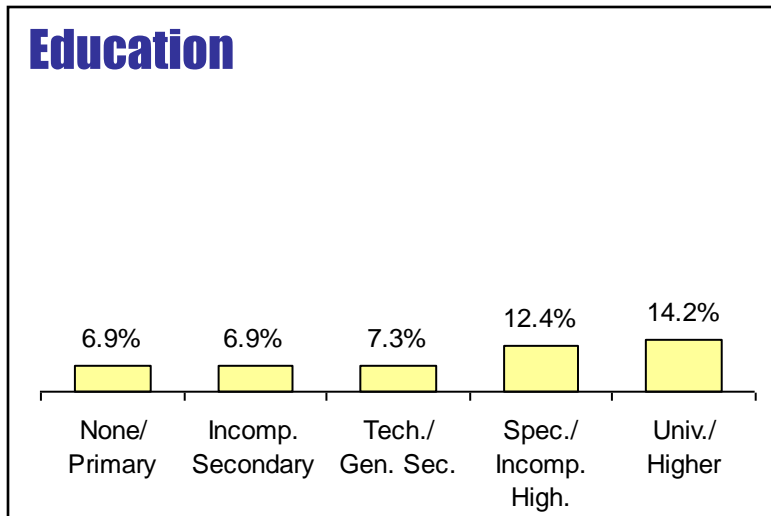
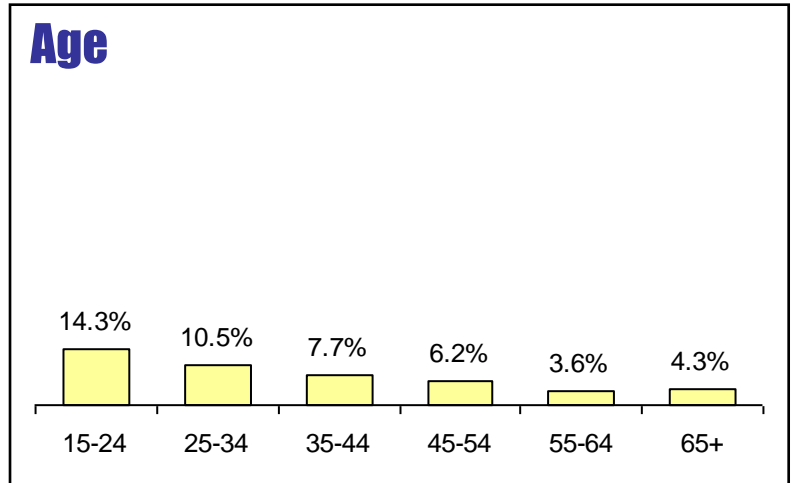
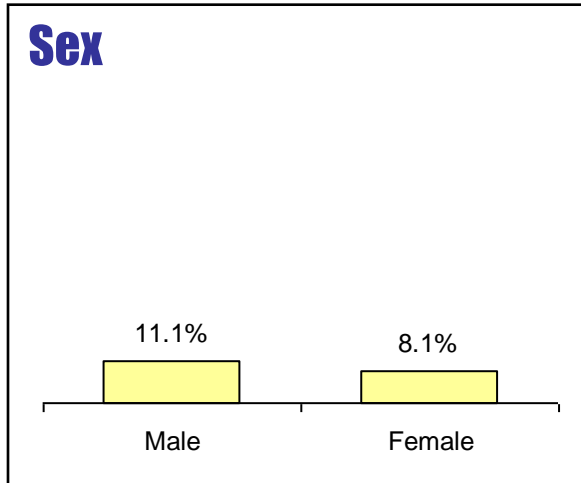
How trustworthy do you think the news and information on (channel) is?

Rank	Station (yesterday reach)	percent annual listeners rating station's news as very trustworthy/ somewhat trustworthy
1	Radio Belis (21 Vek) (9.4)	90
2	Kyrgyzstan Obonduru (7.5)	88
3	Avtoradio (5.6)	87
4	Pyramida (2.4)	87
5	Radio Almaz (2.9)	87
6	Hit FM (3.9)	86
7	Russkoe Radio (4.6)	85

Base: Annual listeners for each broadcaster in 2008. Radio Belis n=871, Avtoradio n=603, Kyrgyzstan Obonduru n=813, Pyramida n=334, Radio Almaz n=357, Russkoye Radio n= 602, Hit FM n=342, DW n=29.

Evropa Plus Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 9.6%

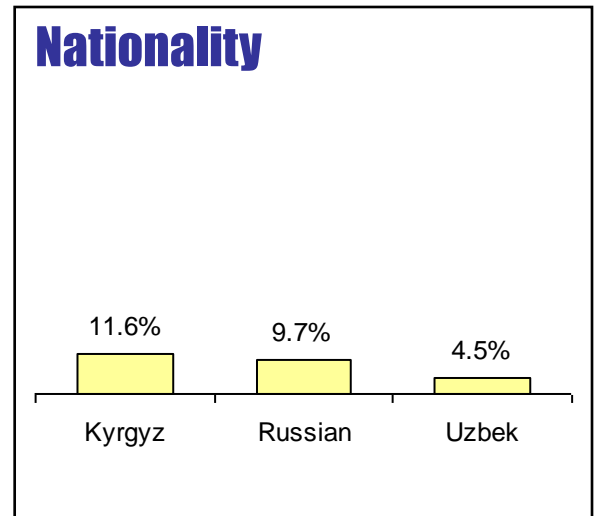
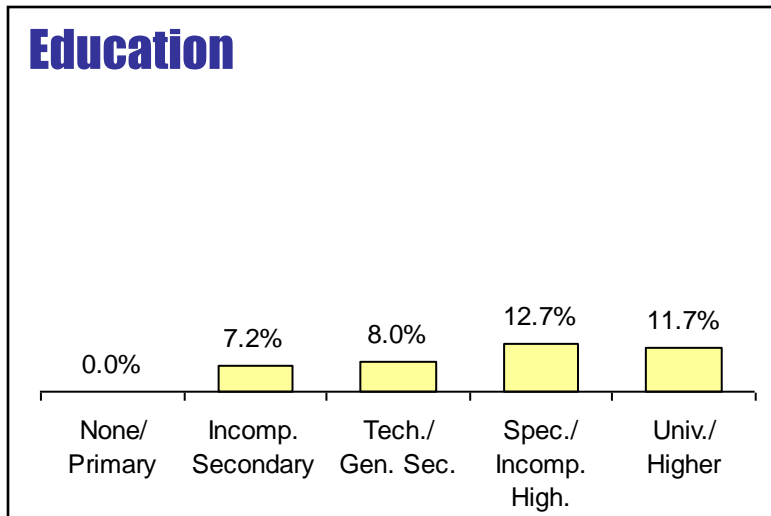
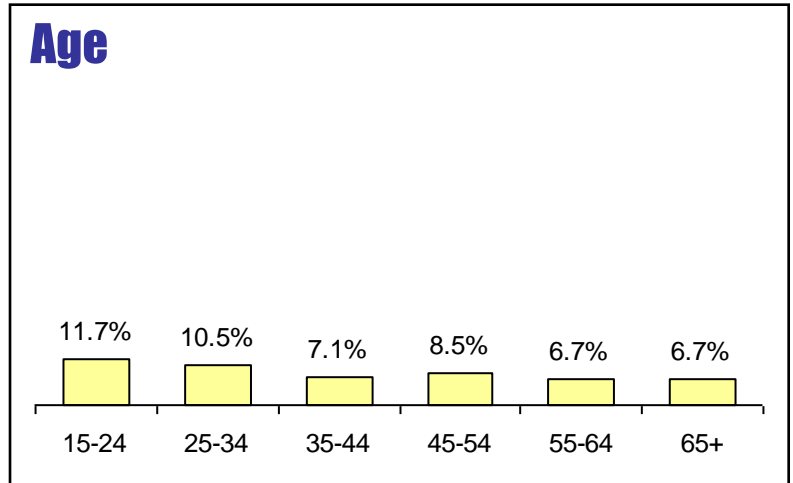
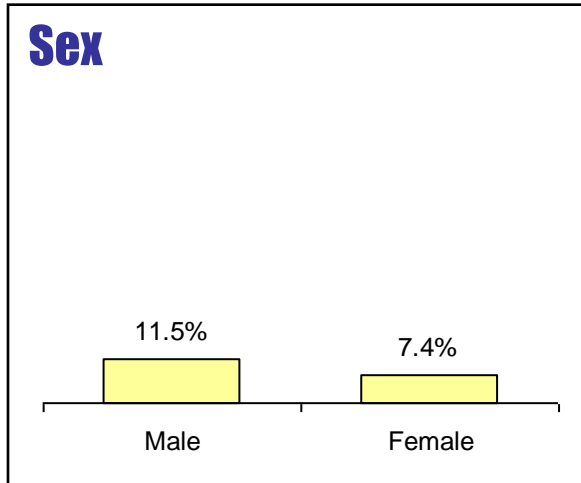


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Evropa Plus is a privately owned broadcaster based in Bishkek. It appeals most to younger and better-educated respondents and is more popular among Russian respondents.
- The broadcaster's "yesterday" and weekly reach figures have declined since 2005, falling from 13.5 percent "yesterday"/32.4 percent weekly to 9.6 percent "yesterday"/23.5 percent weekly in 2008. Despite this, Evropa Plus displaced Kyrgyzstan Obondoru from the position it held as the most popular radio station in Kyrgyzstan in 2005. Kyrgyzstan Obondoru has fallen to third.

Radio Belis (21 Vek) Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 9.4%

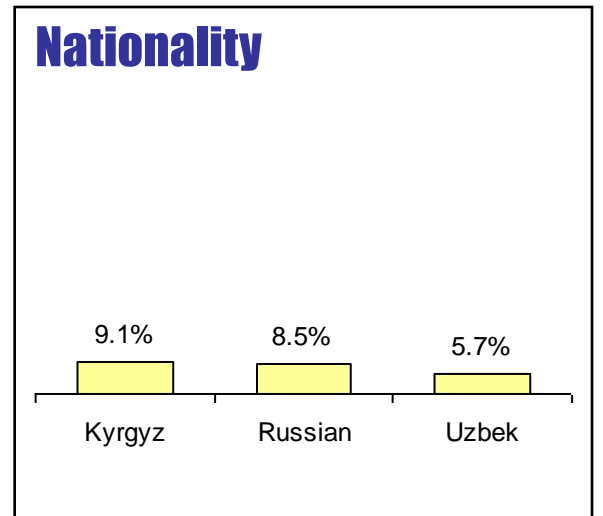
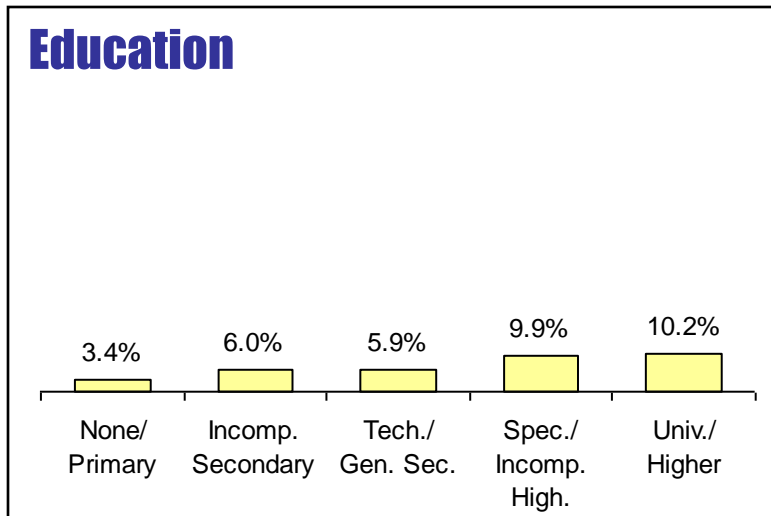
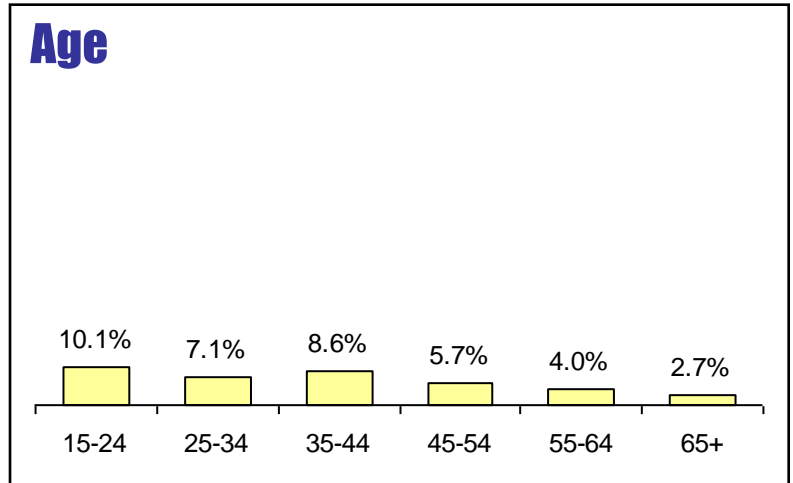
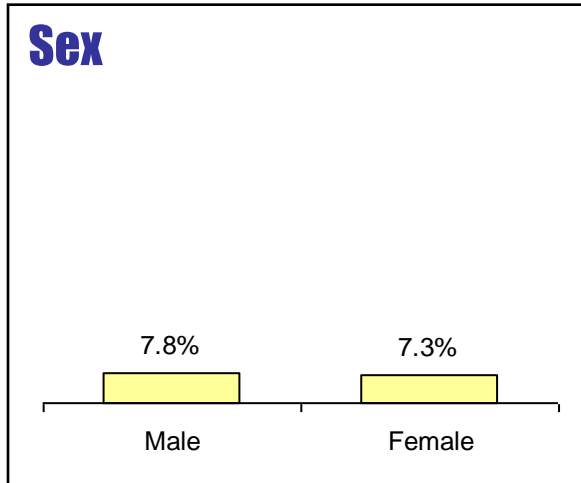


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Radio Belis (21 Vek) is part of the state-owned Kyrgyz National TV and Radio Broadcasting Corporation. Its listeners tend to be younger, better-educated males.
- The broadcaster's "yesterday" and weekly reach figures have also declined since 2005, when it was the third-most popular station, falling from 12.9 percent "yesterday"/31.2 percent weekly to 9.4 percent "yesterday"/22.4 percent weekly in 2008.

Kyrgyzstan Obondoru Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 7.5%

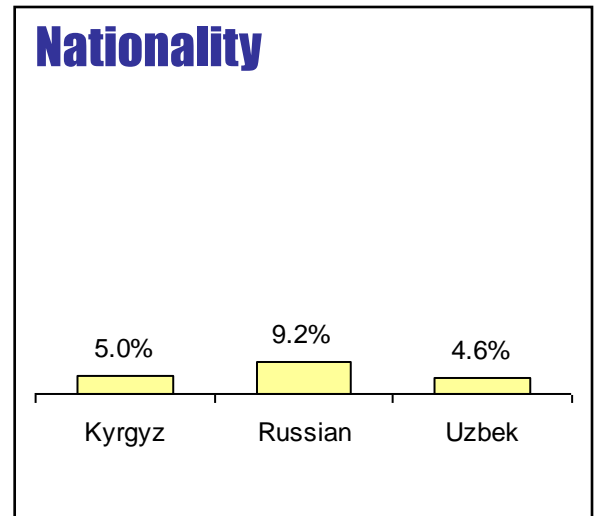
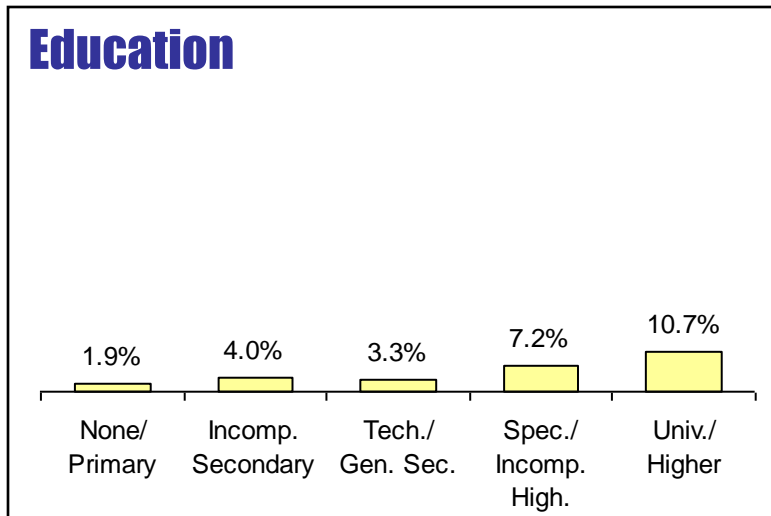
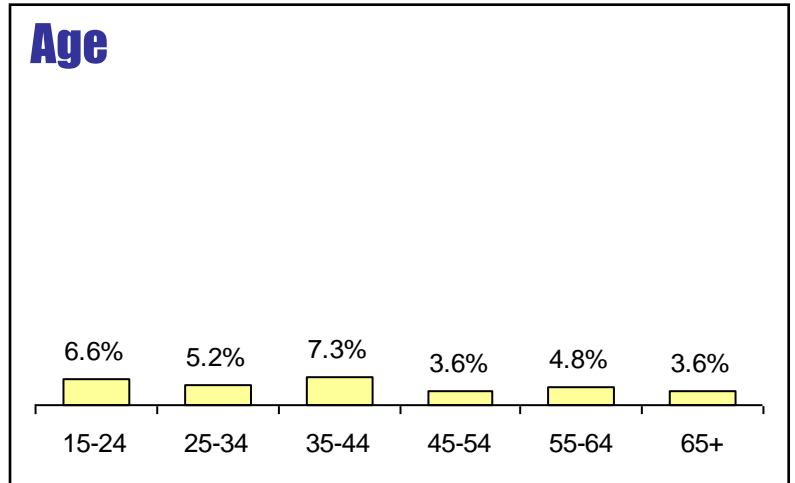
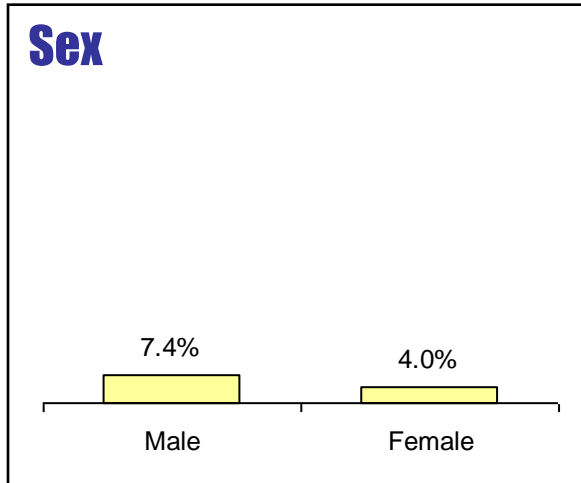


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Kyrgyzstan Obondoru is a privately owned radio station based in Bishkek. It appeals mostly to younger, better-educated respondents.
- The broadcaster's "yesterday" and weekly reach figures have also declined since 2005, when it was the most popular station, falling from 15.8 percent "yesterday"/34.8 percent weekly to 7.5 percent "yesterday"/19.1 percent weekly in 2008.

Avtoradio Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 5.6%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Avtoradio is a privately owned radio station. Like the other radio stations featured in this report, it is most popular among younger, better-educated respondents. It is also more popular among males and among Russian respondents. Its "yesterday" and weekly reach figures remain essentially unchanged from those recorded in 2005; however, then it was the eighth-most popular station, whereas in 2008, it is the fourth-most popular.



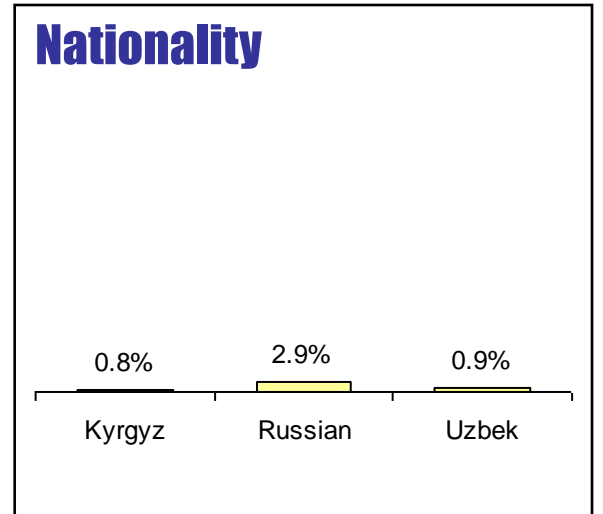
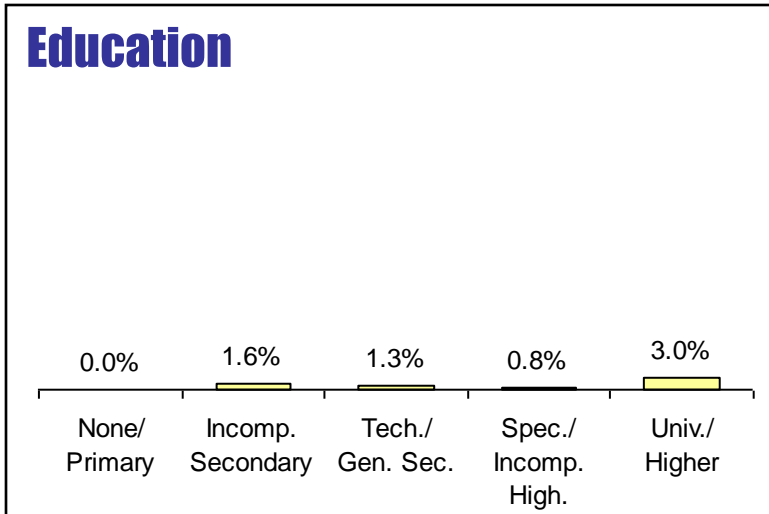
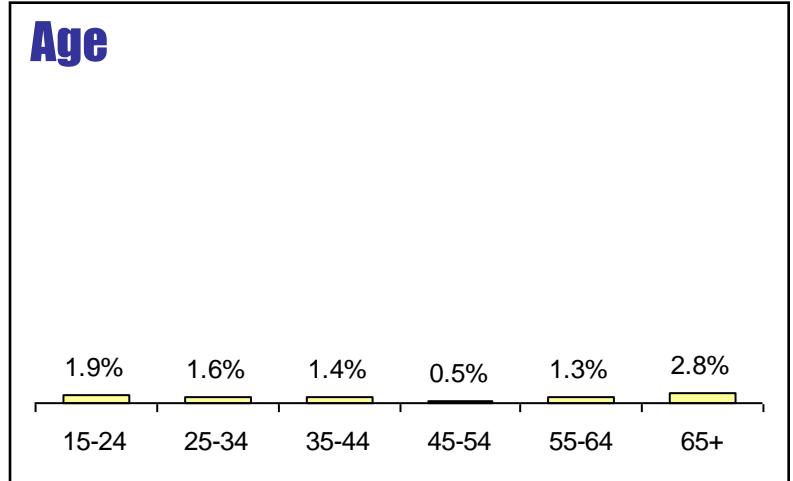
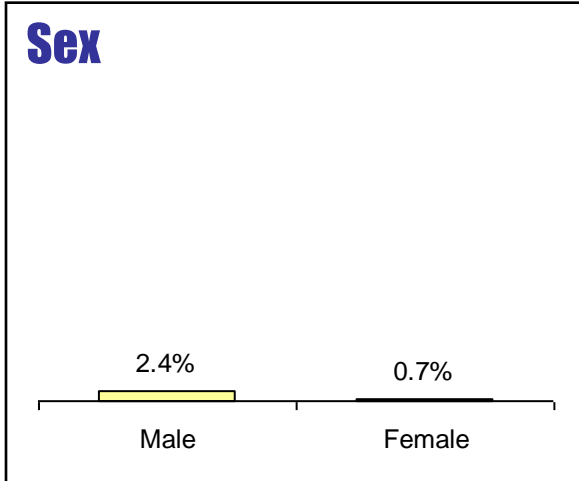
How favorably or unfavorably inclined are you personally toward the United States?

Rank	Station (Number of yesterday viewers)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,000)	28	34	20	15	2
1	Vodiy Sadosi (46)	46	31	13	9	0
2	Radio Almaz (52)	39	32	10	20	0
3	Pyramida (47)	35	32	24	3	6
4	Kyrgyzstan Obondoru (144)	32	36	20	11	2
5	Evropa Plus (182)	28	42	21	9	1
Bottom 5						
1	Radio Shanson (32)	11	31	37	13	8
2	Min Kyial (48)	19	47	21	11	2
3	Hit FM (73)	25	33	34	6	2
4	Avtoradio (113)	25	36	25	12	2
5	Love Radio (32)	26	31	33	4	6

- The table shows attitudes toward the United States by yesterday listeners of radio broadcasters.
- The stations are ranked by the percentage of "very favorable" responses among listeners; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.

Radio Shanson Audience "Yesterday" Reach Among Demographic Segments

"Yesterday" Reach: 1.5%



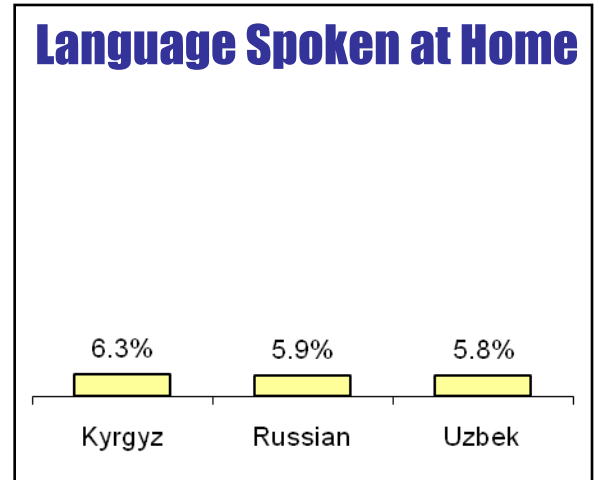
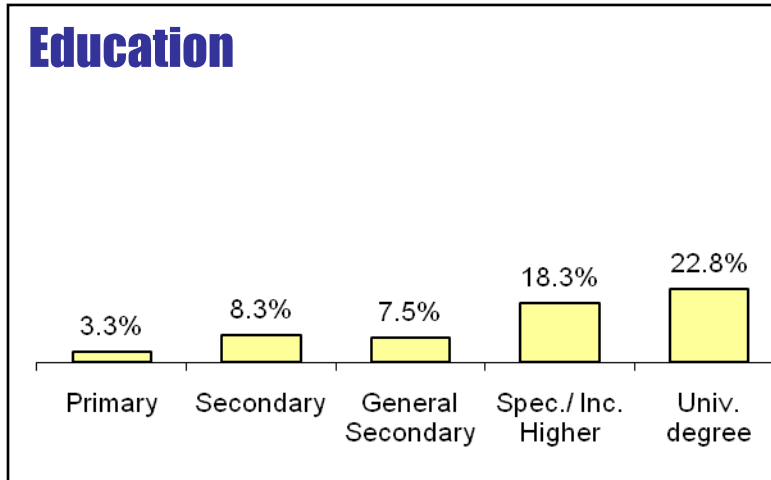
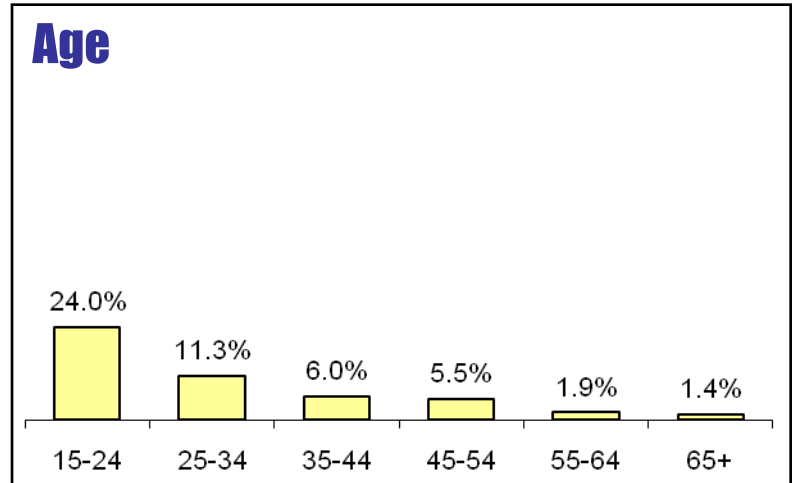
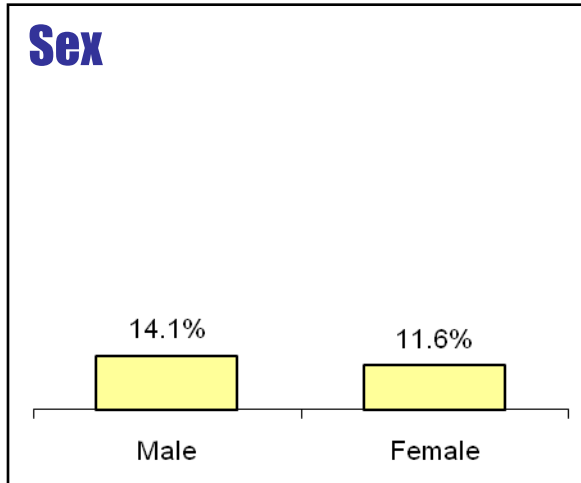
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Radio Shanson is a Russian station.
- Its “yesterday” and weekly reach figures remain essentially unchanged from those recorded in 2005.
- listeners are the least favourably inclined toward the United States.



- Internet use remains static in Kyrgyzstan: in 2006, the internet had 7 percent weekly reach among the general population, 5 percent among Kyrgyz speakers, rising to 7.2 percent weekly reach among the general population and 5.2 percent weekly reach among Kyrgyz speakers in 2007. In 2008, these figures had not changed: the internet has 7.3 weekly reach among the general population and 6.4 among Kyrgyz speakers. As for using the internet specifically for news and information about current events, the figures remain unchanged from 2006: 7 percent of the population reports using the internet to get information about current events on a weekly basis.
- The web is increasingly accessed from home. Less than one-quarter (22 percent) of regular internet users reported accessing the internet from home in 2007, but more than one-third (36 percent) of regular users reported accessing the web at home in 2008. Internet cafés retain their popularity.
- Also of significance in Kyrgyzstan is that the level of internet use is much different among Kyrgyz, Russian and Uzbek speakers. Thirteen percent of Russian speakers report using the internet on a weekly basis, but that figure drops by more than one-half to 6 percent among Kyrgyz speakers and 4 percent among Uzbek speakers. This may be in part due to a higher concentration of Russian speakers in urban areas (where there is better internet access) than in either the Kyrgyz- or Uzbek-speaking populations. As elsewhere, internet is higher among the young, male and urban.
- Among popular internet sites, an important change this year is the rise of 24.kg from the fifth position to the third position, with 29.8 percent of regular internet users indicating they use the site “most often” for news and information. The proportion of regular internet users using this site most often has more than tripled since 2007.
- Although 98 percent of regular internet users said they access sites in Russian (the same as in 2007), internet use in Kyrgyz has gone up. In 2008, 25 percent of regular internet users reported accessing sites in Kyrgyz, compared to 8.9 percent in 2007. The desires of the Kyrgyzstani population are also changing: in 2007, when asked what language they would wish to receive more information, 19.9 percent said Kyrgyz. In 2008, 42.0 percent said Kyrgyz, suggesting there is an increasing market for Kyrgyz content.
- Among regular users, internet continues to be highest in Bishkek (44 percent), followed by Chui *oblast* (22 percent) and Osh *oblast* (17 percent). No other *oblast* or region reached 10 percent.
- The percent of the population with a working cell phone continues to grow in Kyrgyzstan, rising to 72 percent in 2008 from 56 percent in 2007. Cell phone ownership is higher among Russian speakers, 80 percent of whom report having a working cell phone.
- The majority of those who have a cell phone use their phones for more than just making calls: instead, exchanging messages with friends and family and games are popular.
- Receiving information from an official news provider is increasing, growing from 6 percent in 2006 to 11 percent in 2007 and 15 percent in 2008.

Annual Reach Among Demographic Segments



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

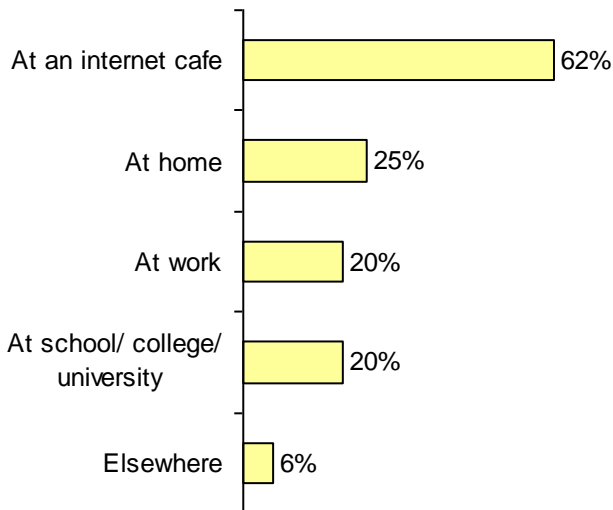
- Internet user profiles remain essentially unchanged from 2008 in the sense that users tend to be younger and better-educated respondents. There is little difference which language they use at home.

Rank	Site	percent accessed in past 12 months
1	mail.ru	11.4
2	Rambler	9.4
3	Yandex	7.5
4	Google	6.7
5	Yahoo!	5.5
6	24.kg	4.4
7	novosti.kg	3.3
8	Akipress	2.5

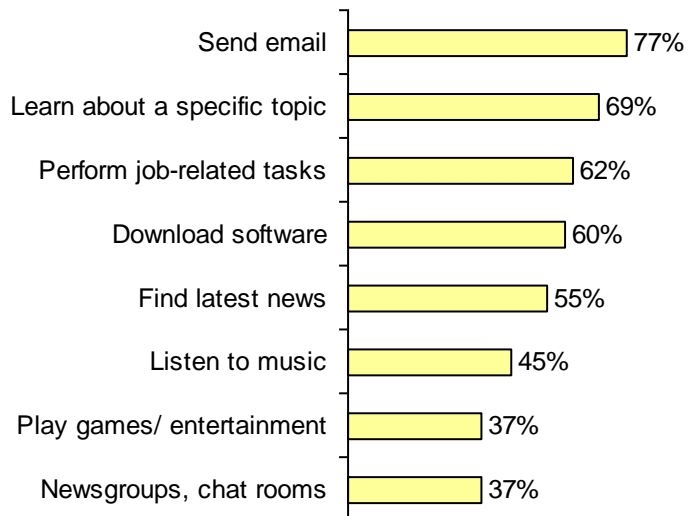
Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

Internet Activity Among Users

Where most often used?



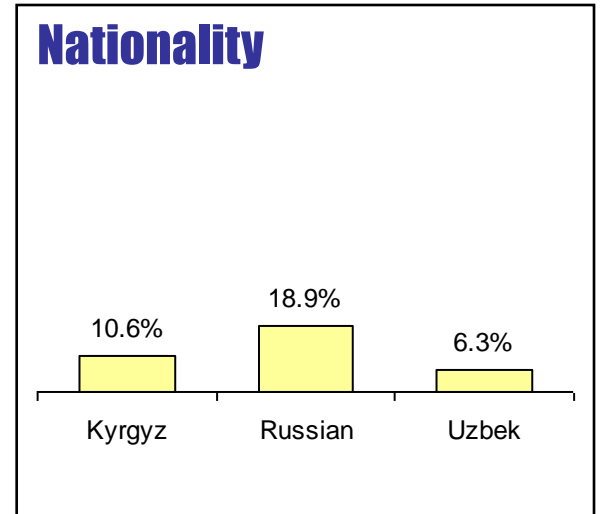
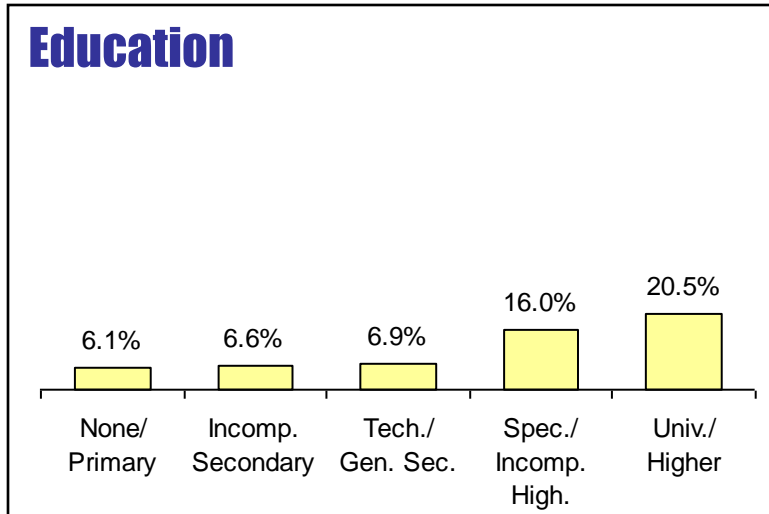
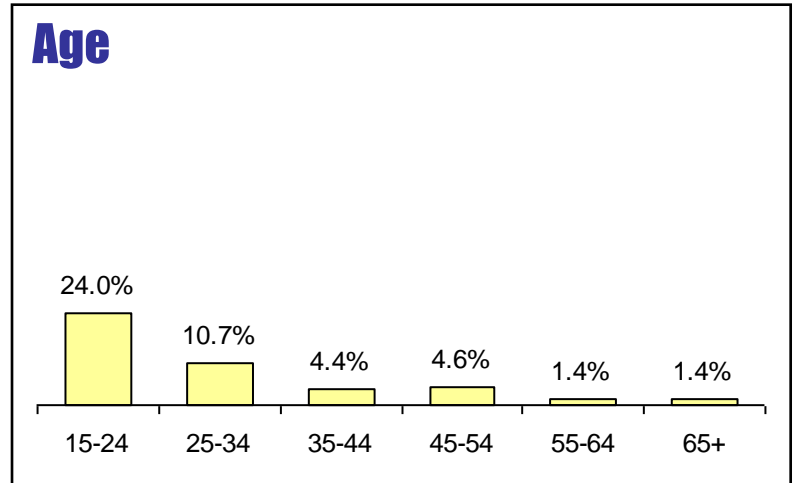
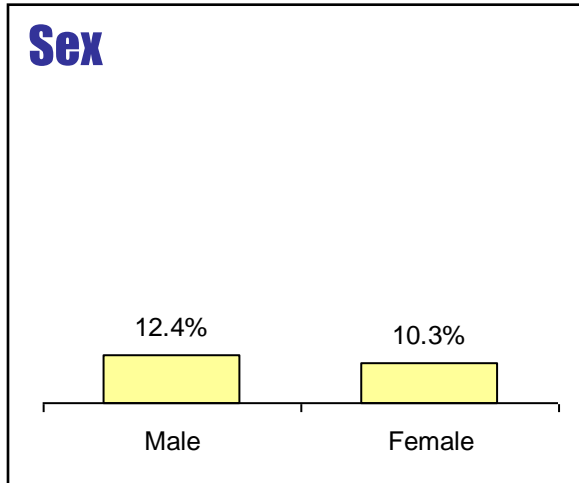
Which activities used in last four weeks?



Base: n = 232 annual internet users (adults 15 and older) in Kyrgyzstan

Access in Past Four Weeks Among Demographic Segments

Past Four Weeks Reach: 11.4%

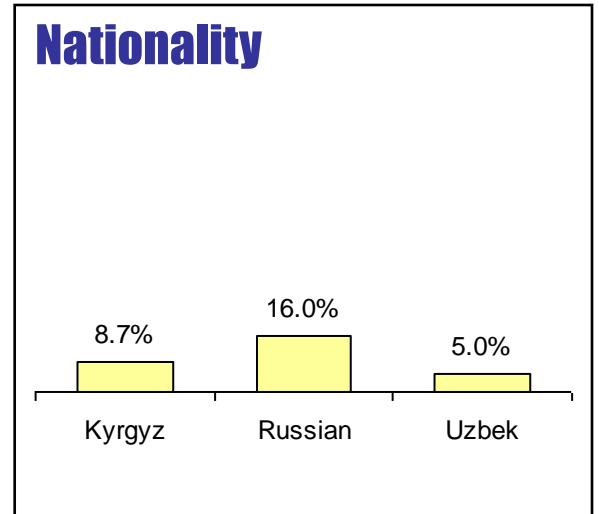
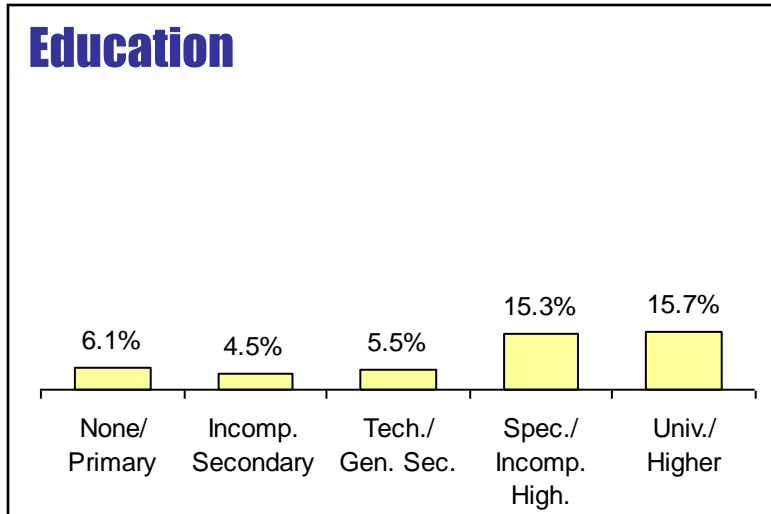
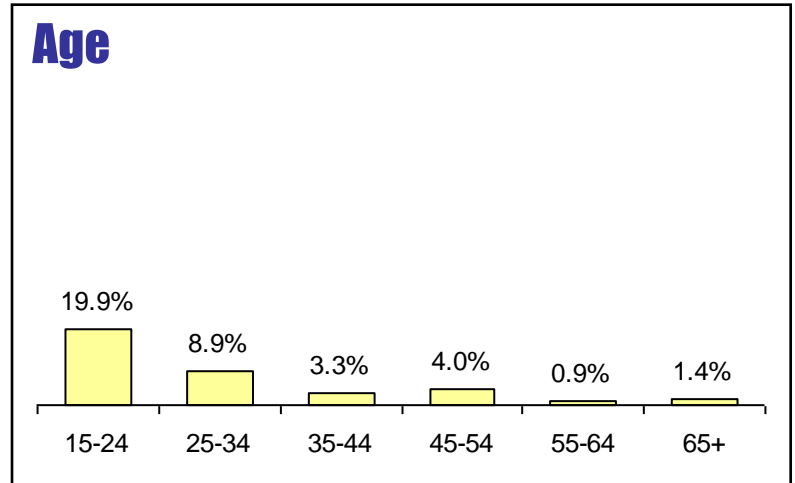
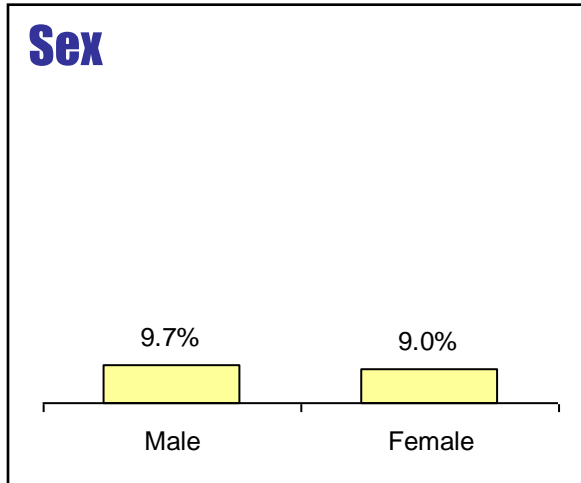


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Mail.ru is a Russian-language email provider. It remains the most popular internet site in Kyrgyzstan. According to alexa.com, the internet site ranking website, mail.ru is the 21st most popular website in the world based on Alexa's "calculated using a combination of average daily visitors and page views over the past three months." This and the following rankings were accessed on 22 May 2009. Mail.ru appears to be the leading Russian-language site.

Access in Past Four Weeks Among Demographic Segments

Past Four Weeks Reach: 9.4%

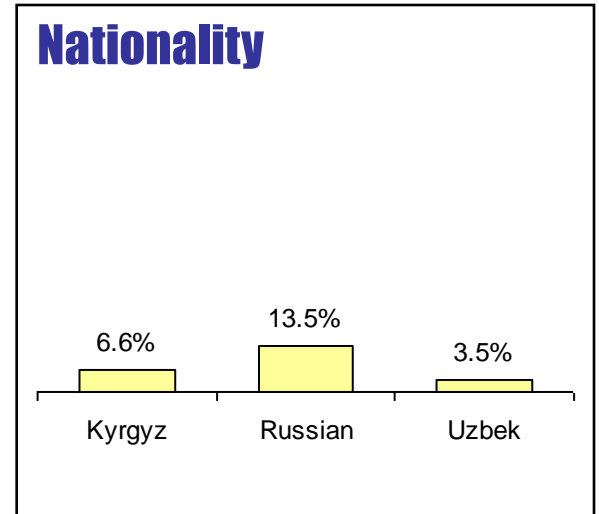
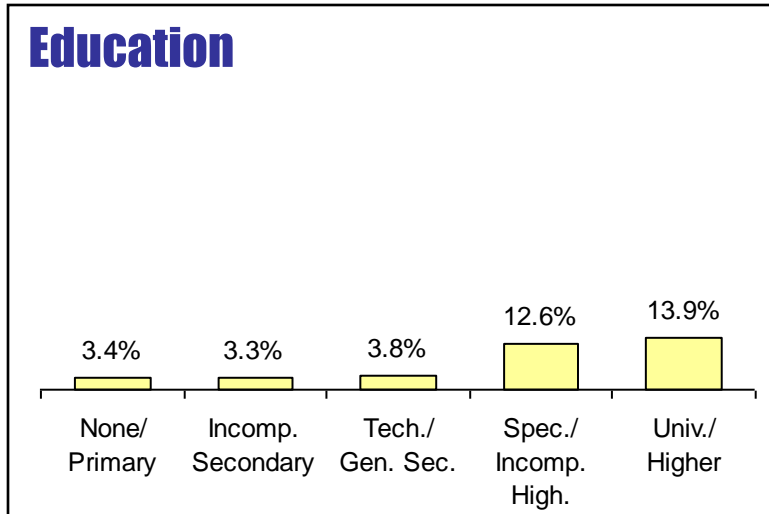
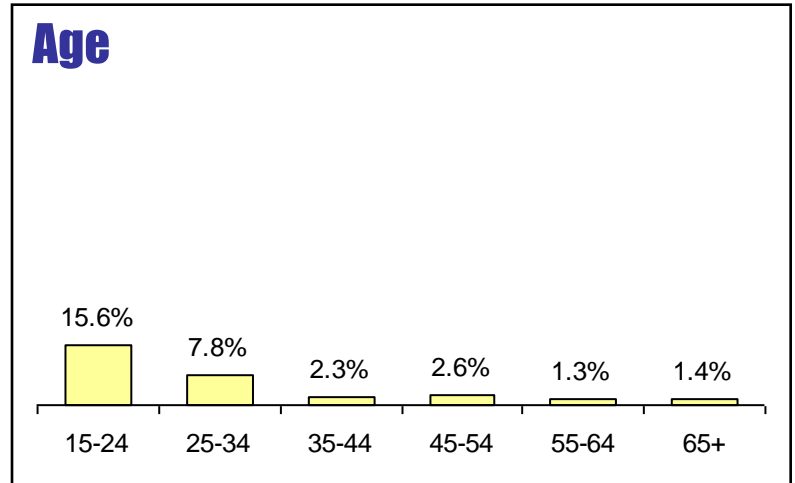
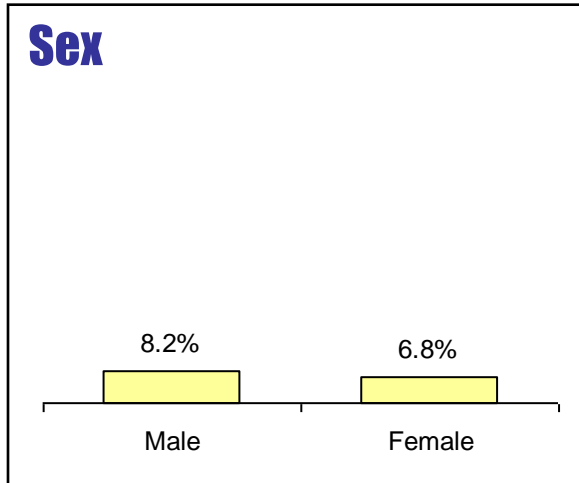


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Rambler.ru is a Russian-language internet portal. According to Alexa, it is the 87th most popular website in the world.

Access in Past Four Weeks Among Demographic Segments

Past Four Weeks Reach: 7.5%

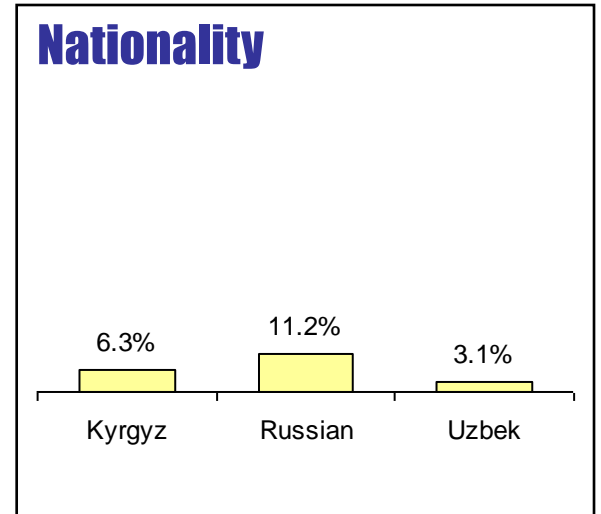
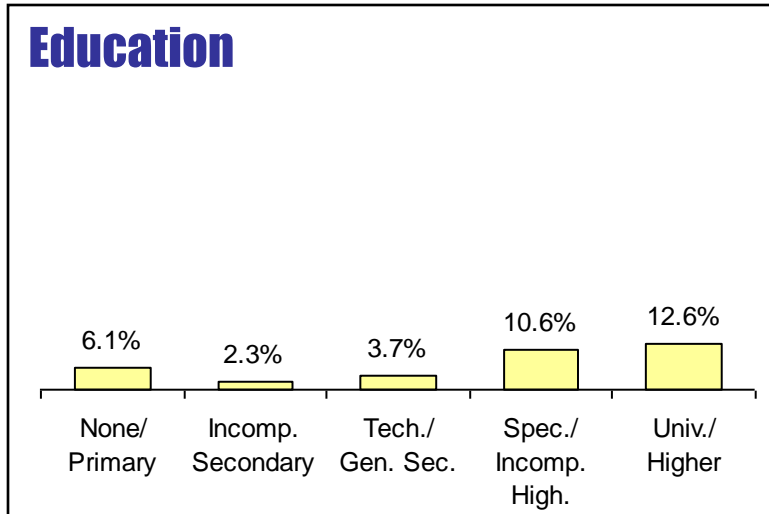
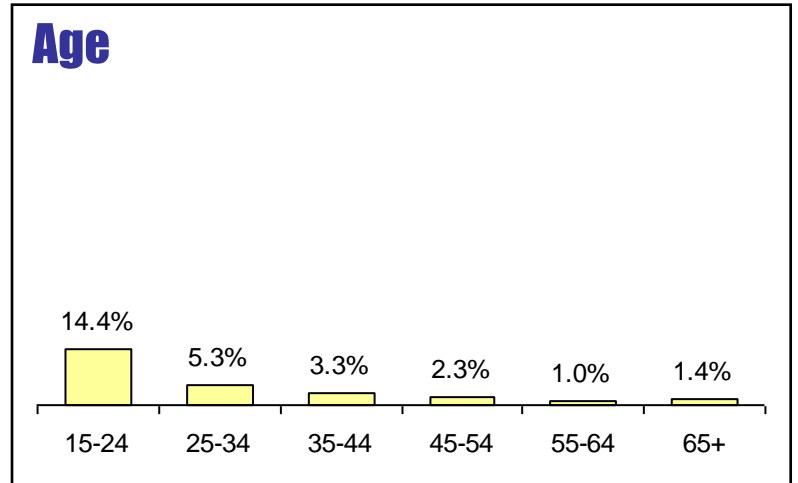
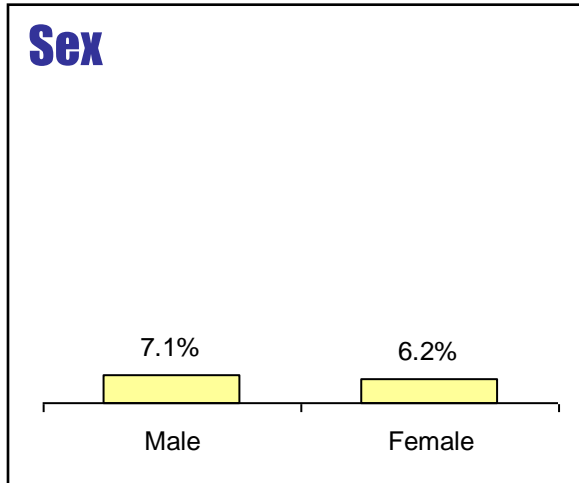


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Yandex.ru is a Russian-language internet portal. According to Alexa, it is the 31st most popular website in the world.

Access in Past Four Weeks Among Demographic Segments

Past Four Weeks Reach: 6.7%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Google is the U.S.-based internet search site. According to Alexa, it is the most popular website in the world.

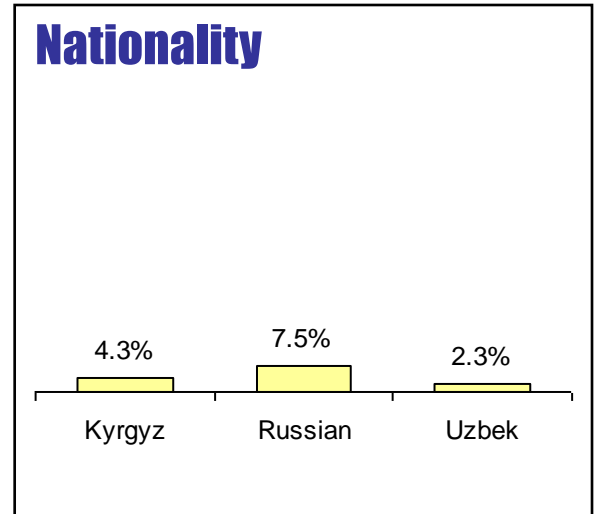
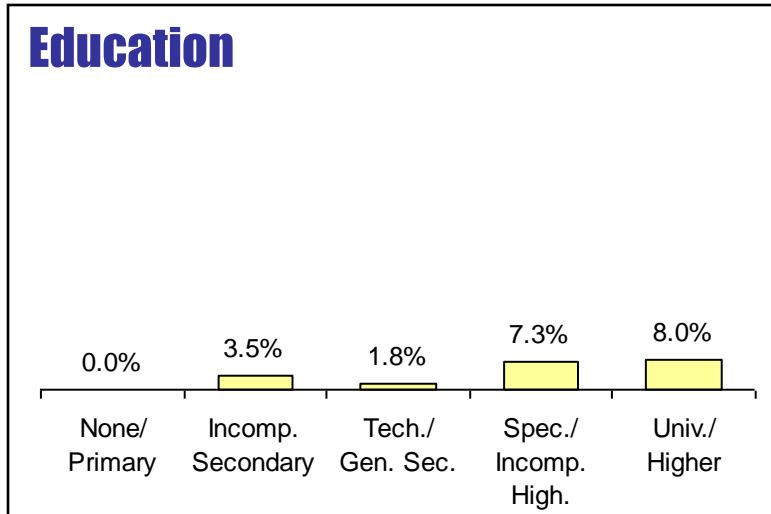
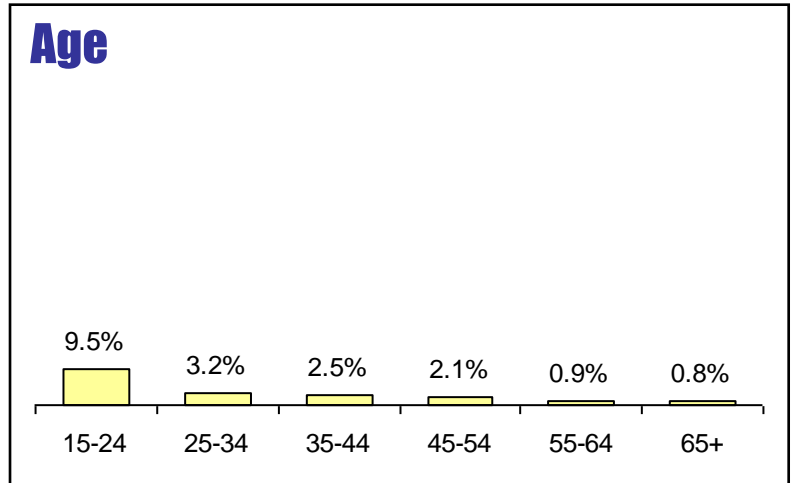
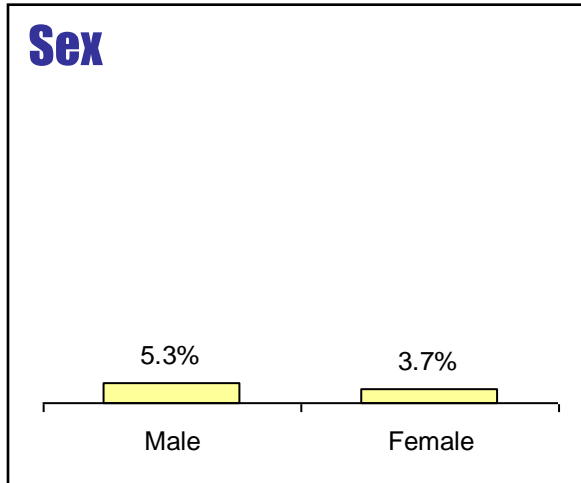
How favorably or unfavorably inclined are you personally toward the United States?

Rank	Website (Number of monthly users)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,000)	28	34	20	15	2
1	Akipress (46)	30	43	23	2	2
2	Rambler (169)	28	39	26	6	1
3	novosti.kg (62)	27	48	21	3	1
4	Yandex (138)	27	39	27	6	1
5	mail.ru (204)	26	40	27	6	1
Bottom 3						
1	24.kg (82)	22	45	22	9	2
2	Yahoo! (99)	24	43	27	7	0
3	Google (121)	25	43	24	7	1

- The table shows attitudes toward the United States by monthly users of the internet.
- The sites are ranked by the percentage of “very favorable” responses among users; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.

Access in Past Four Weeks Among Demographic Segments

Past Four Weeks Reach: 4.4%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- 24.kg is the Russian- and English-language news website of 24 Press Club and News Agency based in Bishkek. It's Alexa traffic rank is 93,391.



- Print media continues to be an important source of news and information, with 40 percent of respondents reading a newspaper at least once a week for news and information. This places newspapers on par with radio as an information source.
- In the newspaper market, *Super Info* has maintained its position as the leading newspaper, boosting weekly reach from 22.8 percent in 2007 to 33.5 percent in 2008 among the general population. There is now a significant gap between this paper and middle-tier papers.
- Citizen journalism does not appear to be growing in Kyrgyzstan. In 2007, 23 percent of the Kyrgyz-speaking population was “very” or “somewhat” likely to share a picture with the media and 29 percent were “very” or “somewhat” likely to call a media organization. In 2008, those figures did not significantly change. Sharing news with friends and family is a more popular activity, and one that is less likely to vary among Kyrgyz speakers and the general population. For example, 93 percent of the general population and 92 percent of the Kyrgyz-speaking population is very or somewhat likely to tell friends and family about an event.
- In March, a *Reporter Bishkek* journalist was attacked and stabbed outside the newspaper’s offices. The newspaper is independent and publishes reports and editorials critical of the government.



Rank	Newspaper	Read in past 7 days
1	<i>Super Info</i>	33.5
2	<i>Vecherniy Bishkek</i>	15.7
3	<i>Agym</i>	13.3
4	<i>Aalam</i>	13.3
5	<i>KTR OBO</i>	13.0
6	<i>Delo No</i>	8.8
7	<i>Erkin Too</i>	7.5
8	<i>Komsomal'skaya Pravda</i>	5.5
9	<i>Kyrgyz Rukhu</i>	5.2
10	<i>Pyramida</i>	5.0
11	<i>Slovo Kyrgyzstana</i>	4.6
12	<i>Osh Zhanyrygy</i>	4.2
13	<i>Blits Info</i>	4.1
14	<i>Osh Park</i>	3.6
15	<i>Spid Info</i>	2.7
16	<i>Bishkek Tayms</i>	2.5
17	<i>Moskovskiy Komsomolets</i>	2.5
18	<i>De Fakto</i>	2.5
19	<i>MSN</i>	2.2
20	<i>AiF-Aziya</i>	1.6
	Other	16.7
	Did not read a newspaper	38.4

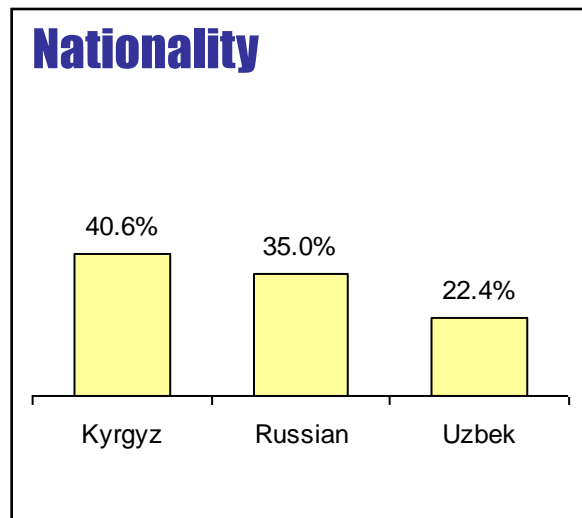
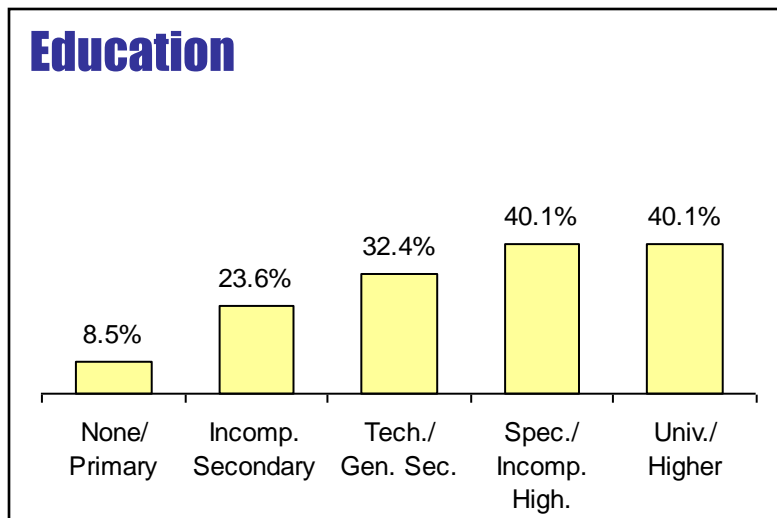
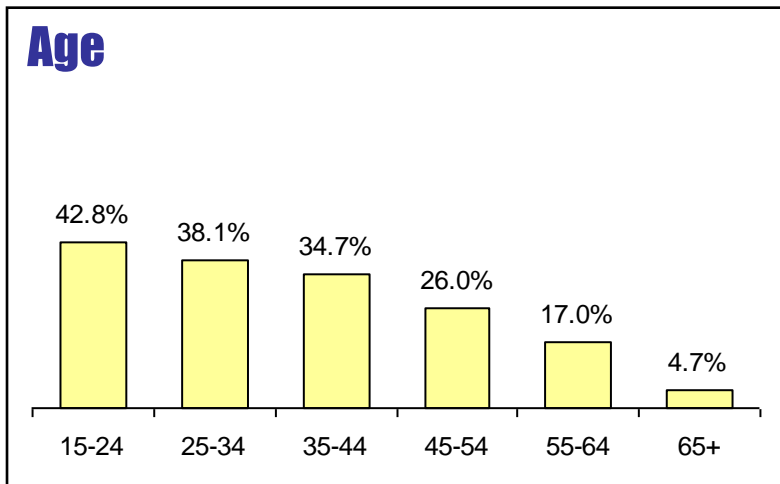
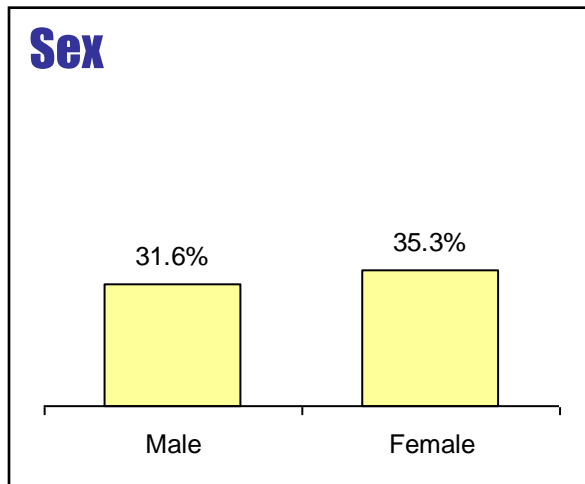


Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information? (Respondents were allowed to name three sources)

Rank	Newspaper	First choice as most important	Total (selected as one of three most important sources)
1	<i>Super Info</i>	3	14
2	<i>Vecherniy Bishkek</i>	1	5
3	<i>Agym</i>	0	3
4	<i>KTR OBO</i>	0	2
5	<i>Erkin Too</i>	0	2
6	<i>Delo No</i>	0	1
7	<i>Slovo Kyrgyzstana</i>	0	1
8	<i>Osh Zhanyrygy</i>	0	1
9	<i>Osh Park</i>	0	1

Super Info Readers Weekly Reach Among Demographic Segments

Weekly Reach: 33.5%

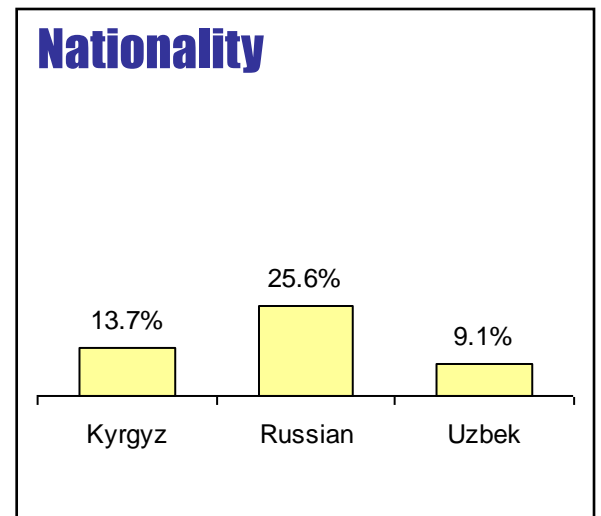
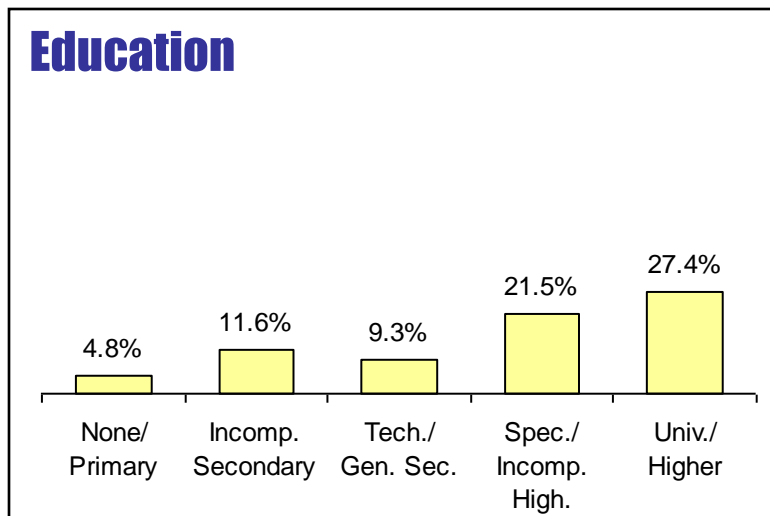
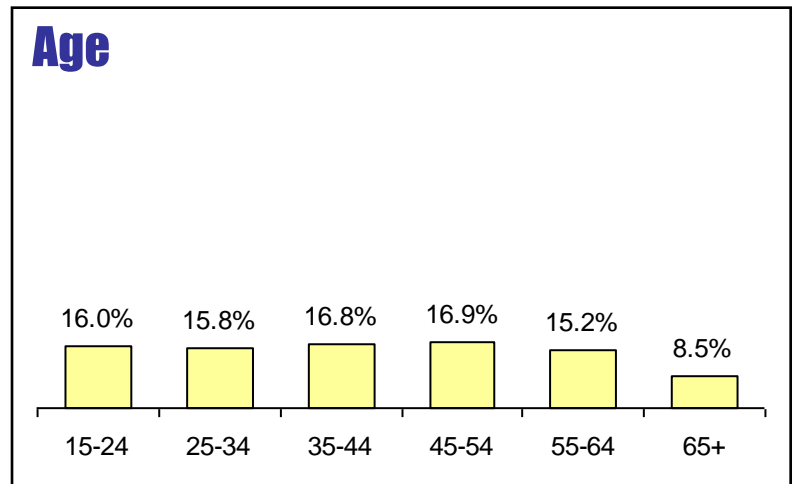
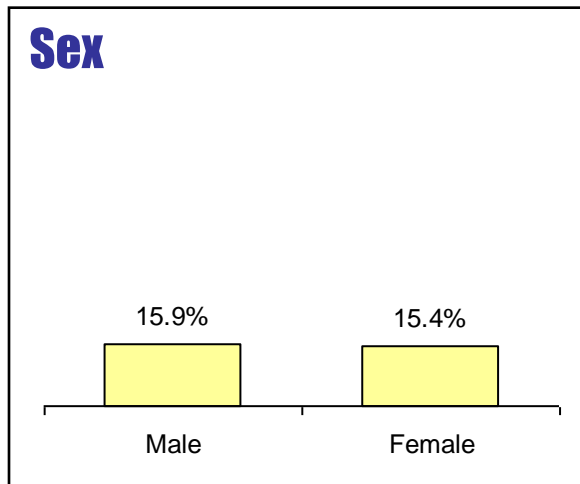


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- *Super Info* is the most popular newspaper in Kyrgyzstan, attracting one-third of respondents weekly. Readers tend to be younger and better-educated. Women are slightly more likely to read the newspaper and readers are more likely to be Kyrgyz.

Vecherniy Bishkek Readers Weekly Reach Among Demographic Segments

Weekly Reach: 15.7%

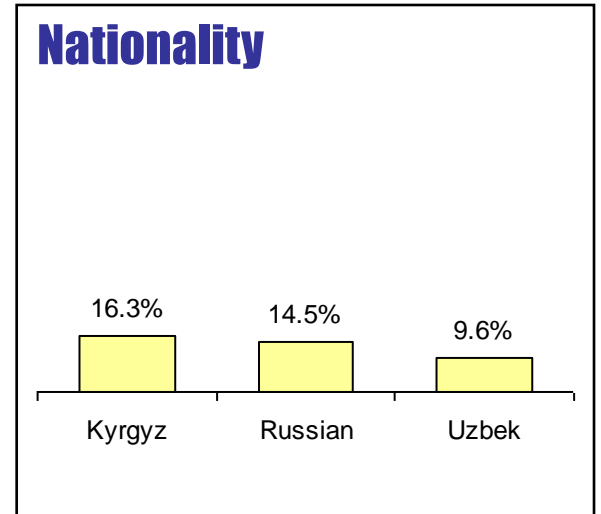
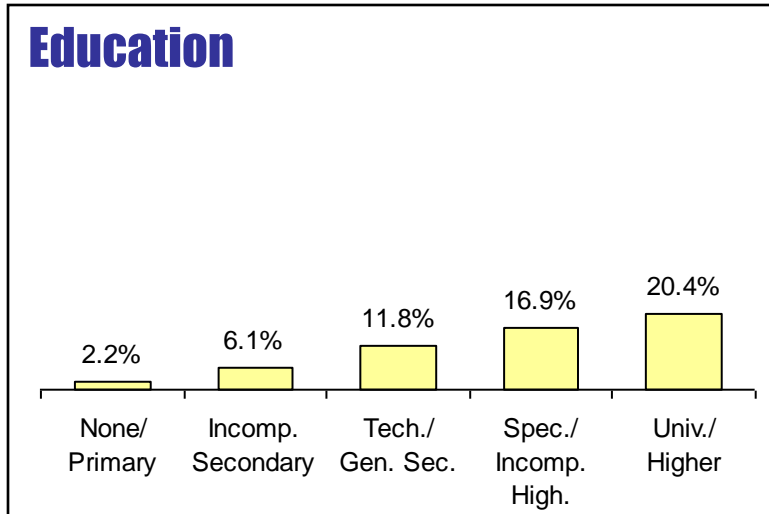
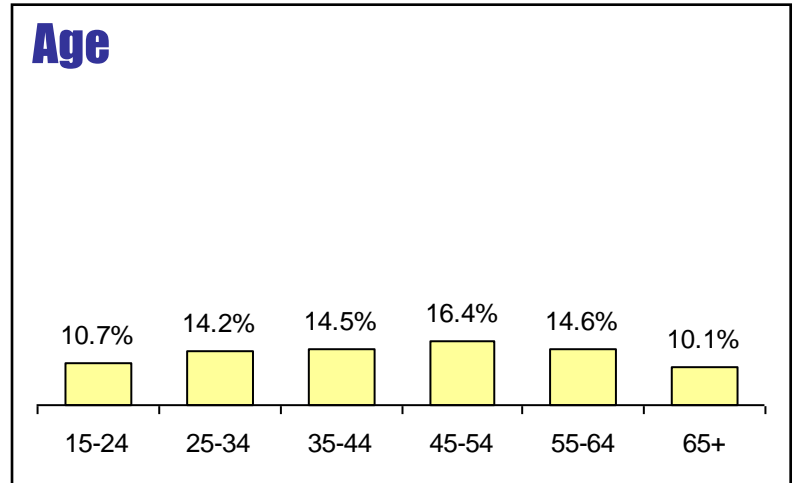
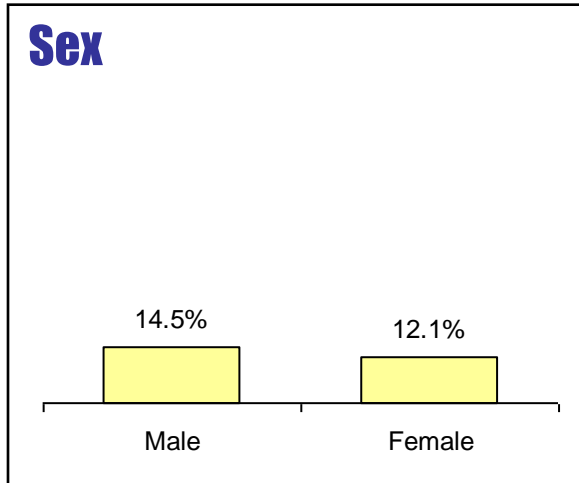


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Vecherniy Bishkek* is a privately owned Russian-language daily that attracts about one in six respondents weekly. Readers tend to be better-educated Russians. The newspaper's weekly reach is unchanged from 2005.

Agym Readers Weekly Reach Among Demographic Segments

Weekly Reach: 13.3%

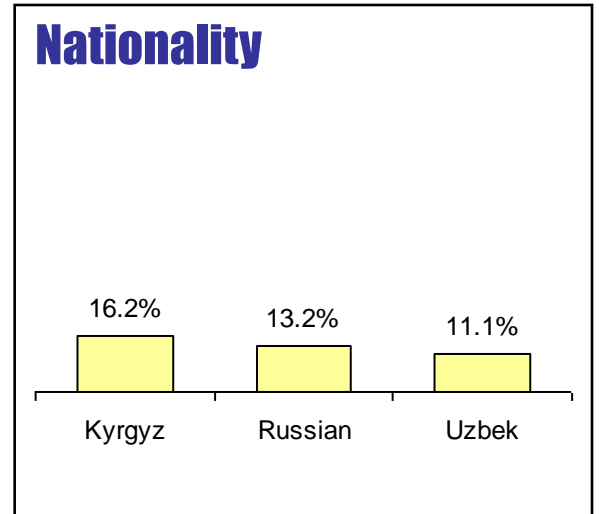
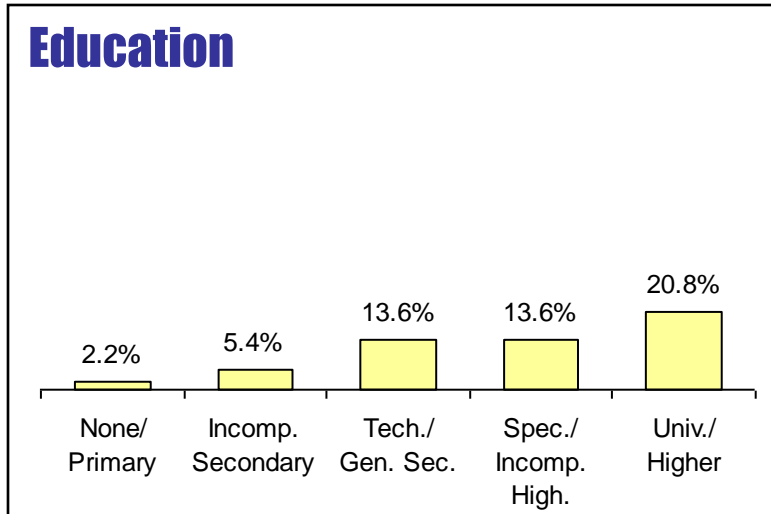
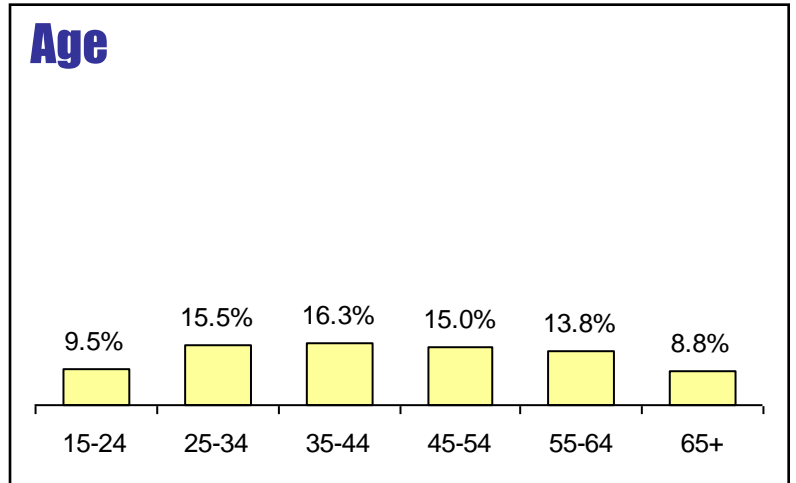
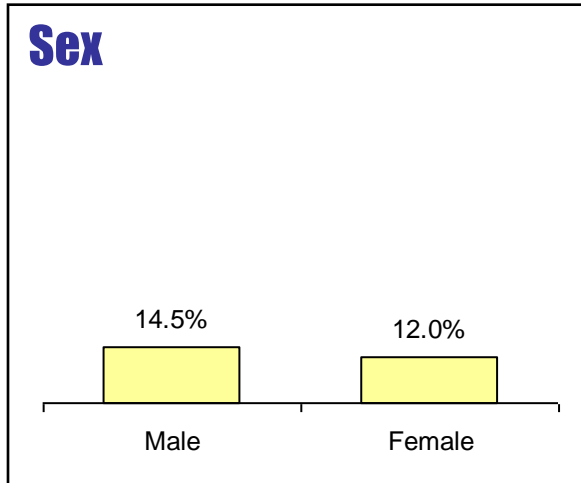


Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- *Agym* (“The Current”) is a Kyrgyz-language business newspaper. Its readers are mostly middle-aged, highly educated males.
- The newspaper’s weekly reach is unchanged from 2005.

Aalam Readers Weekly Reach Among Demographic Segments

Weekly Reach: 13.3%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- *Aalam's* weekly reach increased from the 8.5 percent recorded in 2005.



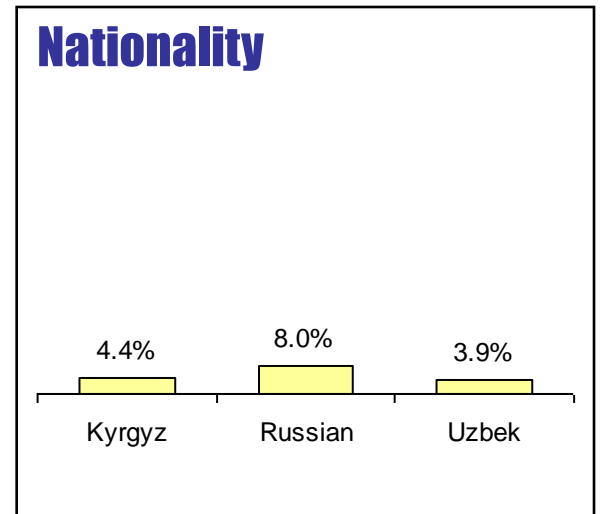
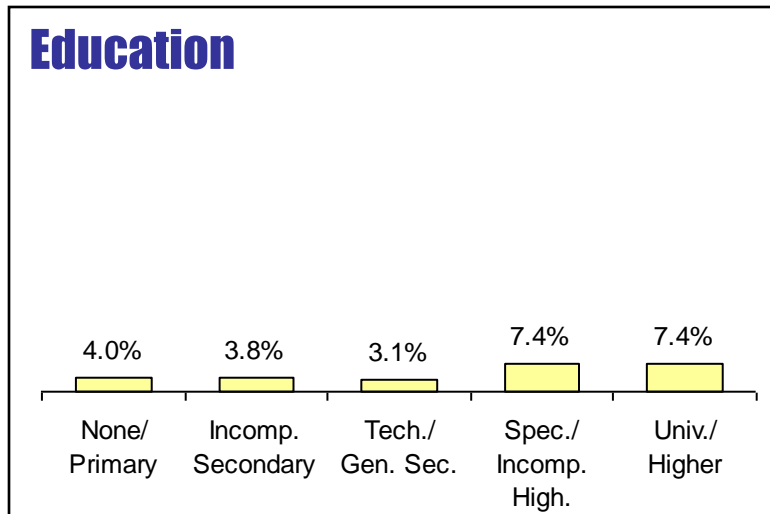
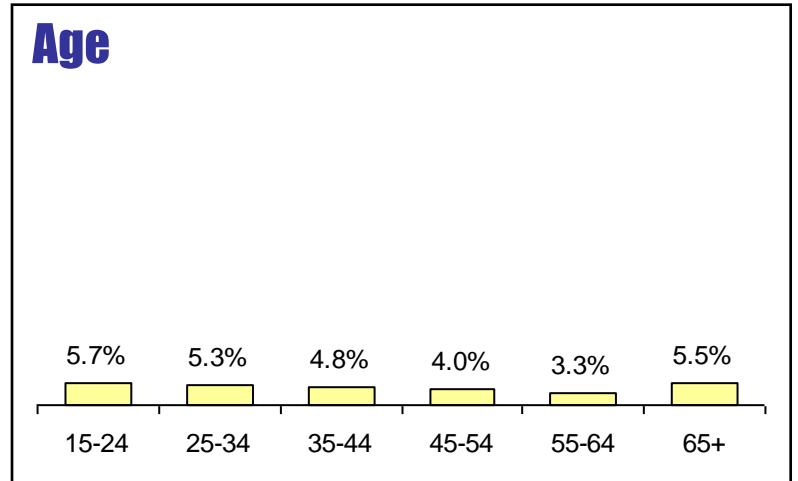
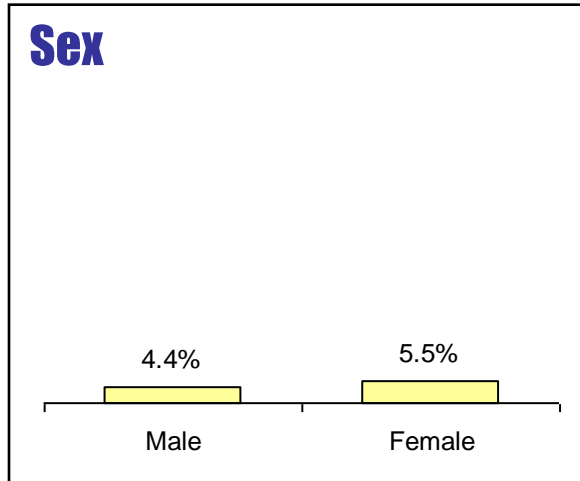
How favorably or unfavorably inclined are you personally toward the United States?

Rank	Newspaper (Number of weekly readers)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,000)	28	34	20	15	2
1	<i>MSN</i> (44)	44	31	13	13	0
2	<i>De Fakto</i> (50)	35	41	13	12	0
3	<i>Super Info</i> (645)	34	36	17	13	1
4	<i>Blits Info</i> (78)	34	26	26	13	1
5	<i>Osh Park</i> (70)	32	43	23	2	0
Bottom 5						
1	<i>Pyramida</i> (101)	19	51	22	6	2
2	<i>AIF-Aziya</i> (33)	20	34	32	11	3
3	<i>Vecherniy Bishkek</i> (319)	22	41	23	10	3
4	<i>Komsomal'skaya Pravda</i> (118)	23	35	28	12	2
5	<i>Spid Info</i> (53)	24	45	26	5	0

- The table shows attitudes toward the United States by weekly readers of newspapers.
- The newspapers are ranked by the percentage of “very favorable” responses among readers; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.

Pyramida Readers Weekly Reach Among Demographic Segments

Weekly Reach: 5.0%



Base: n = 2,000 (adults 15 and older) in Kyrgyzstan

- Pyramida is an influential media outlet in Kyrgyzstan; however, its ownership is not clear.