

# MEDIA CONSUMPTION IN KYRGYZSTAN



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## GLOSSARY

**HH** – households

**KR** – the Kyrgyz Republic

**TV** – television

**DTV** – digital television

**N** – number of respondents surveyed

**ADR** – Average Daily Reach – average number of viewers watching TV/a TV channel or listening to radio/a radio station in a day

**AWR** – Average Weekly Reach – average number of viewers watching TV/a TV channel or listening to radio/a radio station at least once a week

**Ratings** – share of viewers who watched a particular program/TV channel in a particular time slot or time of day, as a percentage of the total population

## INTRODUCTION

Over the six years that passed since the previous large [study](#) of media preferences of Kyrgyzstan dwellers, the media layout of the country has changed radically. Traditional media, TV and radio, are forced to retreat under the pressure of web-based and social media. At various speeds, this is happening all over the world, and today it is important to register at which point in this process Kyrgyzstan is located.

Not only the channels of information delivery that are changing; the tools of its consumption are changing as well. Smartphones are replacing TV sets and radio receivers. The schedule of information consumption is changing: from timings set by the broadcaster to times determined by the reader/listener/viewer. Moreover, the focus of the consumers' attention is changing, from text-based to visual content.

The main players in Kyrgyzstan's traditional media space remain the same, but today they don't compete so much with one another (TV channel vs. TV channel, radio station vs. radio station): rather, all of them together compete against an initially faceless "social network" that is ever-growing, by the second, with no content plan or schedule, whose content adapts to the tastes and preferences of the consumer much faster than new programs can appear on a TV channel or radio station.

The diversity and unpredictability of new media are both attractive and alarming. In this study, we show the current proportion of consumption of traditional vs. new media, examine to what extent and in which social groups new media have displaced traditional ones, the level of trust in different types of media, and whether there are any differences in preferred content between audiences of different media.

However, as significant as the changes in the media space have been, many patterns of both consumer and business behavior remain. In our study, we try to meet the needs of a diverse readership.

The traditional metrics of institutionalized media success—ADR, AWR, share—will help us assess the place of TV channels and radio stations in Kyrgyzstan as a whole and in individual regions, while the data on the new channels of media consumption will hopefully prompt new solutions to meet the changing demands of the information consumer.

## SUMMARY

### Social & demographic portrait of the respondents

- 3636 household representatives have taken part in the survey; average number of persons per household was 4.18.
- The survey covered all sociodemographic groups and strata.
- The main language of communication in respondent families was Kyrgyz (73%); 12% of the households surveyed primarily spoke Russian, and 11%, Uzbek. In 3% households, two languages were used equally.
- 94% of respondents have smartphones, and on average 88% go online at least once a day.
- 53% of the households surveyed have a car.

### Consumption of media and trust to media channels

- Social media are the main channel for information delivery, mentioned by 53% respondents. TV and Internet media are in second and third place respectively, at 36% and 32%.
- 1.45 hours is the average amount of time a Kyrgyzstan resident spends watching TV every day (excluding those who do not watch it at all).
- The average level of trust of the population to the information seen/heard through various media resources is about 6.17 out of 10. The maximum level of trust is enjoyed by radio (7.2), and the lowest level of trust, by information coming through messaging apps (5.65).
- 79% of respondents are interested in news; for 33% it is the main content in the stream of media. 18% of respondents completely trust the news they hear, and 49%, largely trust it.

### TV

- Every indicator of TV penetration and attention to TV content has shown a downward trend as compared to 2017 data.
- 89% respondents have a TV set in their household.
- Terrestrial TV penetration decreased from 88% to 65%. The share of Internet TV users increased from 5% (2017) to 17%, and cable TV users, from 2% to 8%. Satellite TV is almost out of use (1%, vs 6% in 2017). 25% watch TV channels via their phone/tablet/computer.
- 49% prefer to watch television in Kyrgyz, and 44%, in Russian. The share of those who prefer Russian-language television increased by 6 percentage points (hereinafter, p.p.), while the share of those who prefer Kyrgyz-language television decreased accordingly. 35% of Kyrgyz-speaking households prefer television in Russian.
- 6-month TV audience is 78%, 19 p.p. lower than in 2017. Weekly audience is 71%, and daily audience, 37% (vs. 69% in 2017). TV audience decreased in all regions, most noticeably in Batken region (from 75% to 25%).
- KTRK (7.17%), KTRK Ala-Too 24 (5.58%) and KTRK Balastan (4.78%) are the leading TV channels in terms of daily coverage.
- The concept of "morning prime time" has practically disappeared among the TV audience; the average rating of TV channels changes very little throughout the first half of the day. The evening prime time lasts from 6 to 11 PM, but total evening prime time ratings are

less than half of those in 2017. The peak audience, at 8 PM, is 15.7%, while in 2017 it was 35.3%.

## **Radio**

- The weekly radio audience is 34% (61% in 2017). The sharp decline is obviously due to the spread of listening to music via the internet. Semi-annual radio audience is 43% (76% in 2017).
- The share of weekly radio audience is about the same in all age groups, with a maximum of 37% in the 25-44 years old group.
- The preferred language of radio listening is Kyrgyz (71% of the audience), while only 12% prefer Russian.
- About a quarter of the radio audience (8% out of 34% in the sample) only listen to radio when forced to, in public transport or in taxis.
- News and music are the two main types of content that attract radio listeners. Of all styles of music, most listeners prefer ethnic, classical and retro.
- By average weekly audience, the top three most-listened radio stations in Kyrgyzstan are Kyrgyzstan Obondoru (9.8%), Europa Plus (7.6%), and Min Kiyal (6.8%). The top three has not changed since 2017; only Europa Plus and Min Kiyal have switched places. In Bishkek, the leader is Europa Plus (14.7%), Kyrgyzstan Obondoru is second (11.9%), and the third place is occupied by Avtoradio (10%).
- The car is a significant factor in radio coverage. In households with a car, weekly radio audience is 39%, and in households without a car, 27%.
- Peak radio audience is reached at 10 AM, when 3% of the population listen to it. There is no evening prime time.

## **Internet**

- The audience of Internet in Kyrgyzstan has reached 91%. By the region, it varies from 87% (Batken oblast) to 95% (Bishkek). 83% of respondents go online every day.
- 94% of the households surveyed have smartphones, the main device used to access the Internet. Under 20% of households have computers and laptops.
- 88% of respondents use messaging apps. WhatsApp is in the lead (87%), with Telegram a distant second (43%).
- YouTube is watched by 83% of respondents; it is used equally for movies and music. 48% of YouTube viewers prefer content in Kyrgyz, and 45%, in Russian.
- Paid video and audio services are not very popular, used by 8% and 11% of the audience accordingly. In the lead are the Russian services Kinopoisk (52% of paid video services users, 4% of the sample as a whole) and Yandex.Music (53% and 6% respectively).
- 18% respondents use Kyrgyz websites as a source of news, 5% of respondents use foreign news sites.
- Two thirds of Kyrgyz news sites readers (12% of the sample as a whole) prefer the Kyrgyz language, while one third prefer Russian.
- Azattyk is the most popular Kyrgyz news site (9% of the sample as a whole), followed by Kaktus.media (5%) and Super.kg (4%).

## **Social media**

- 77% of the population use social media. By region, this indicator varies from 68% (Osh region, Batken region) to 85% (Bishkek); it has increased by 31 p.p. since 2017.
- Among young people (14-24), the share of social media users is 94%, in the middle age groups (25-44), over 80%, and even in the 55-65 group it reaches 50%.
- The most popular social media are Instagram (56% of the sample as a whole, 72% of social media users) and TikTok (54% and 69%, respectively). Facebook is used by a quarter of respondents. Odnoklassniki, the most popular network 6 years ago, has lost its standing (17% in the sample as a whole, 22% among social media users).
- The main declared purpose of social media is still "communication" (52% of social media users), although the most popular social media platforms suggest that watching videos is rapidly replacing this purpose in terms of importance. 41% users say that they "primarily" use social users to watch videos.

# 1. STUDY METHODOLOGY

## Target audience:

Population of Kyrgyzstan aged 14+

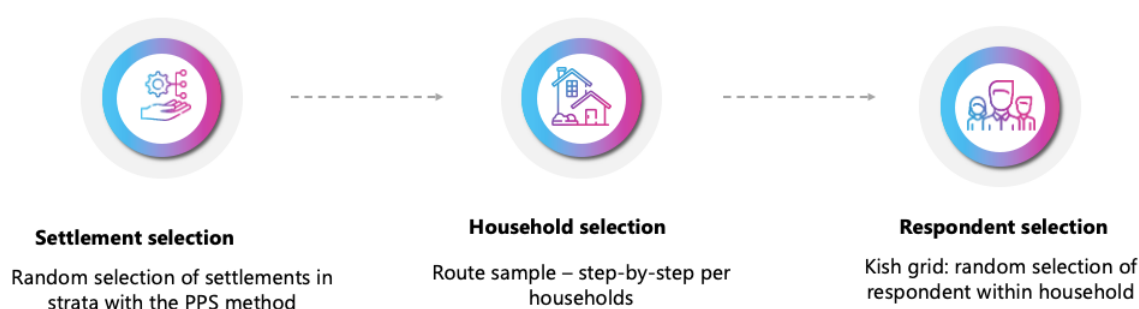
## Study methodology:

To assess media consumption in Kyrgyzstan, a quantitative survey was conducted using the TAPI method (tablet-assisted personal interviews). The survey was held from November 13 to November 26, 2023; the sample was evenly distributed by days of the week to obtain accurate data on active audience (watched TV or listened to radio "yesterday"). To reach respondents of different demographic profiles, the survey was conducted during both daytime and evening hours (10 AM to 8 PM), when most respondents are at home, on both weekdays and weekends. To reach a randomly selected respondent, the interviewer returned to the household up to three times, by prior arrangement with the household member who opened the door. Interviews were conducted in a language convenient for the respondent: Kyrgyz, Russian or Uzbek.

## Study sample:

To construct the sample, a stratified probability sampling methodology was used. The primary sampling units (PSUs) were settlements for rural areas and polling stations for urban areas, selected randomly from the total list of observation units (i.e., from the entire list of settlements in Kyrgyzstan), with the probability of selection for the sample depending on the size of the settlement (PPS method: a first-stage method that selects units randomly with a probability proportional to the population).

At the first stage, the country was stratified based on administrative division into regions and cities of Bishkek and Osh. Within the regions, the sample was then divided into second-level strata based on the type of settlement (urban/rural). Then, within each stratum (urban or rural population of a particular region), towns and villages were randomly selected in each region using the PPS method. Sampling point size<sup>1</sup> 15 interviews. The study sample covered 165 localities, of which 34 were remote or hard-to-reach villages.



*Table 1. Study sample distributed by primary strata*

<sup>1</sup> Minimum sampling unit. In a village, in most cases, only one sampling point will be determined (i.e. 15 interviews); in larger villages and cities the number of units will be higher.



Region		Population	%	Number of respondents	Selection bias, %
1	Bishkek	768 644	17%	606	±4%
2	Osh	218 509	5%	305	±5,6%
3	Chui region	683 707	15%	501	±4,4%
4	Talas region	182 528	4%	300	±5,7%
5	Issyk-Kul region	353 294	8%	304	±5,6%
6	Batken region	363 073	8%	307	±5,6%
7	Jalal-Abad region	856 321	19%	506	±4,4%
8	Osh region	928 223	20%	503	±4,4%
9	Naryn region	201 921	4%	304	±5,6%
	Overall	4 556 220	100%	3636	±1,6%

Table 2. Study sample on the country level by type of settlement

Type of settlement		Population	%	Number of respondents	Number of settlements	
					NatStatComm	Sample
1	Urban	1 581 068	35%	1398	32	18
2	Rural	2 975 152	65%	2238	1963	147
	Overall	4 556 220	100%	3636	1 995	165

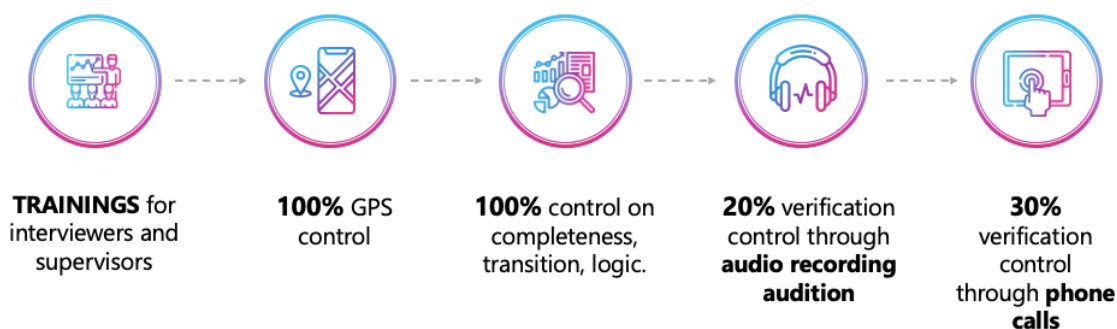
Figure 1. Geographical location of select settlements



For household selection, the commonly adopted random routing approach was used, with a standard step size of  $n+3$  for detached houses and  $n+5$  for apartment buildings. Respondent selection within a household was also done randomly, using a programmed Kish grid.

To ensure quality of the interviews, a comprehensive approach was used: control by interview geolocation, listening to audio recordings of the interviews, calling respondents by the phone to confirm the fact of the interview and check the answers that were not supposed to change (which were also asked during the interview), as well as control at the stage of database check for completeness, logic and transitions.

Figure 2. Quality control of the collected data



## Data weighing

In order to make sure that the sample is representative of the general population, and its design mimics the country parameters, a weighting procedure was applied by sex, type of settlement (urban/rural), age, and region.

This is a standard procedure, used in all sociological studies. It is carried out with the help of the statistical software SPSS. The formula for calculation of the standard weight coefficient is presented below:

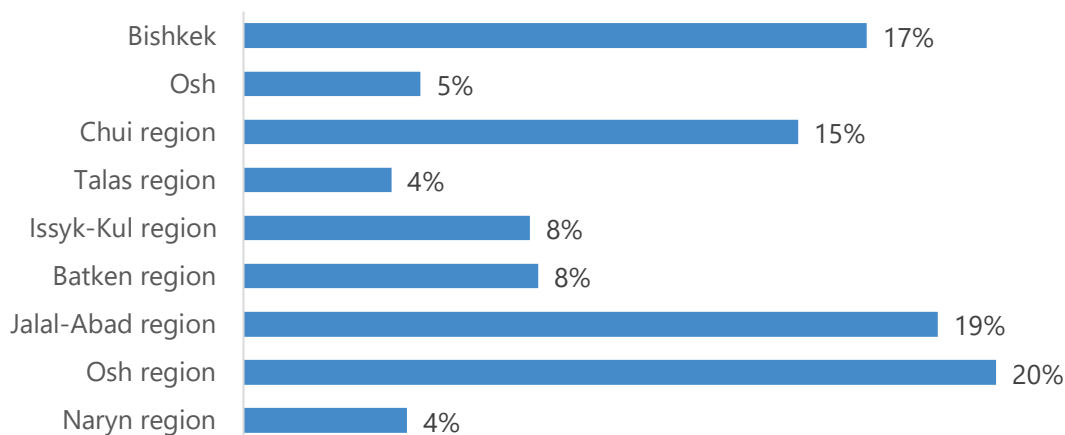
$$\text{Weight} = \text{Share in general population \%} / \text{Share in sample \%}$$

After this procedure was applied, the sample completely mimicked the parameters of the general population, i.e. the structure of the country's population aged 14+ according to the weighting parameters.

## 1.1. Sociodemographic portrait of the audience

The study included 3,636 respondents aged 14+. The study sample reflects the structure of the population of the KR by the main sociodemographic parameters (gender, age, region and type of settlement).

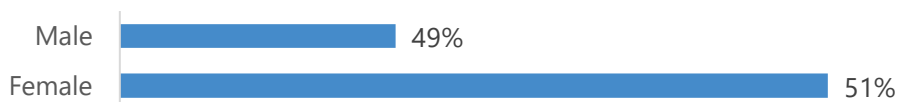
*Chart 1.1 Region, % of the general survey population, N=3636*



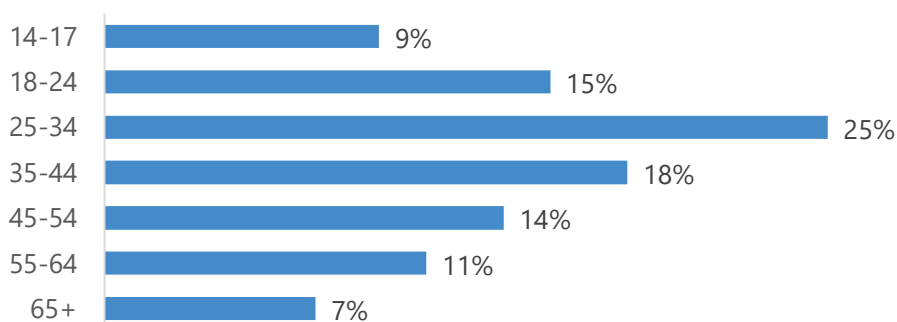
*Chart 1.2 Type of settlement, % of the general survey population, N=3636*



*Chart 1.3 Gender of the respondents, % of the general survey population, N=3636*

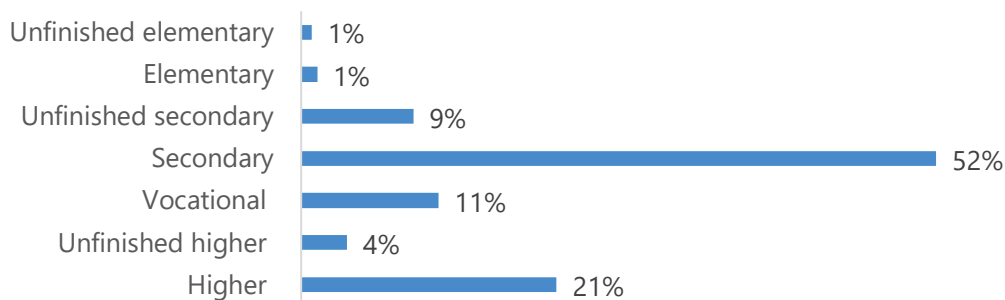


*Chart 1.4 Age of the respondents surveyed, % of the general survey population, N=3636*



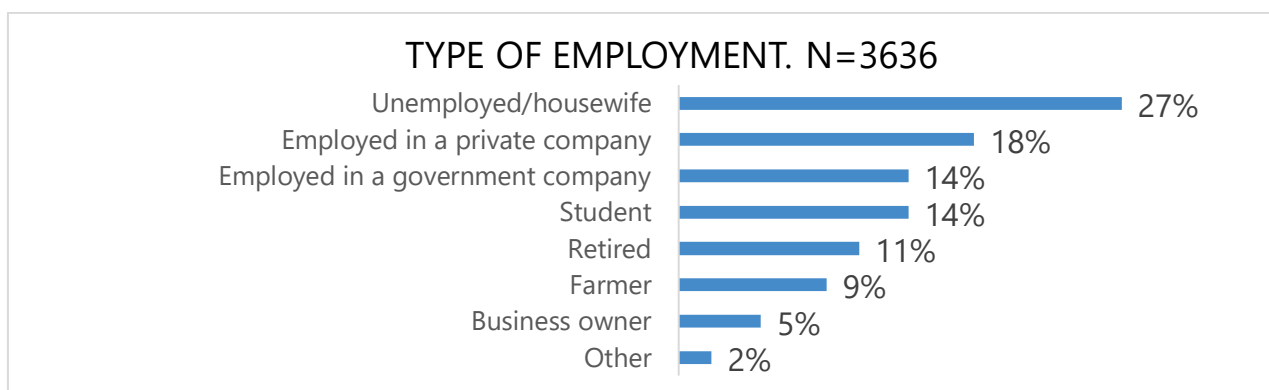
The majority of the sample was made up from respondents with secondary education (52%). Respondents with higher education also make up a significant stratum (21%).

Chart 1.5 Education, % of the general survey population, N=3636



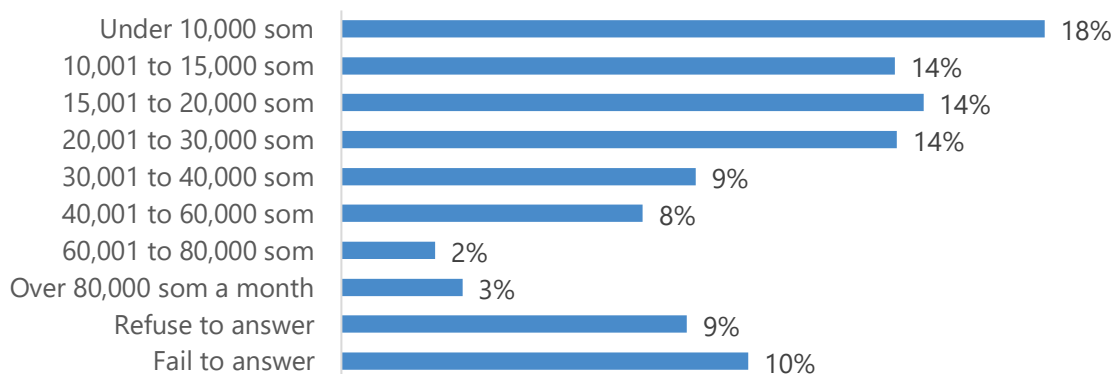
Employed respondents made up about half of the sample; one in four respondents (27%) was unemployed or a housewife; the retired made up 11% of the sample, and students (14%) also were a significant share.

Chart 1.6 Employment status, % of the general survey population, N=3636



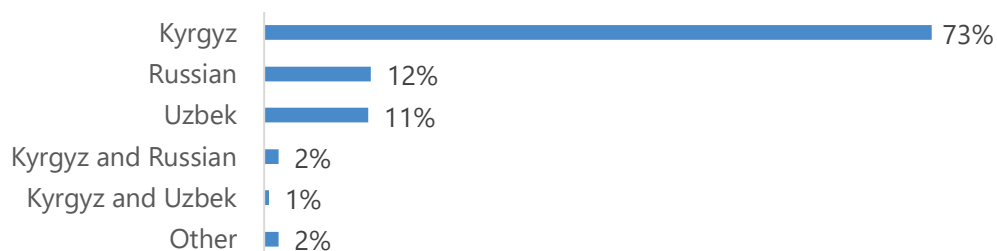
By average monthly household income, the sample can be divided into the following groups: low-income groups (less than 20 thousand soms per month) make up 46%, 31% have an average declared family income (20-60 thousand soms per month), and 5% are wealthy households. It should be noted that almost 20% respondents refused or failed to answer the income question, which is a standard rate of evasion for this relatively sensitive question.

Chart 1.7 Income level of the households surveyed, % of the general survey population, N=3636



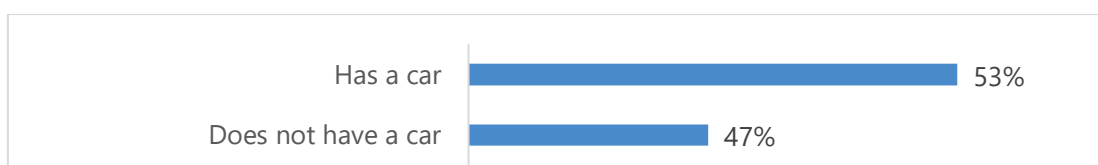
The main language of communication in the majority of the families surveyed was Kyrgyz (73%); the shares of respondents whose main language was Russian or Uzbek were approximately equal, at 12% and 11% respectively. This is an important factor in assessing media content consumption, but not a definitive one, which will be shown further in the report.

*Chart 1.8. Language of communication in the household,, % of the general survey population, N=3636*



The majority of respondents have a car in their household. That is also one of the factors of media consumption, significantly influencing the practice of listening to the radio.

*Chart 1.9 Presence of car in the household, % of the general survey population, N=3636*



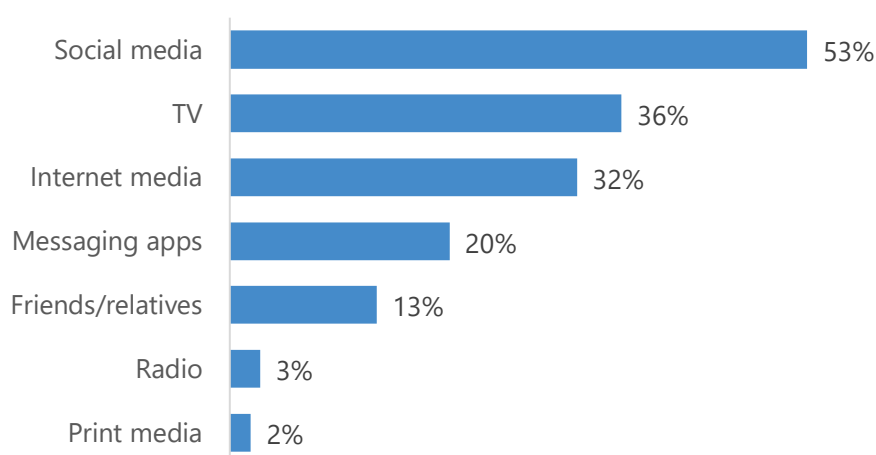
## 2. MEDIA CONSUMPTION

### 2.1. Sources of information

The process of displacement of "traditional" media (TV, radio and newspapers) as sources of information in favor of social media and messaging apps is going on all over the world, and Kyrgyzstan is no exception. Moreover, this process in the Kyrgyz Republic may be described as very rapid. TV is already significantly behind social media as a source of information; radio and newspapers have almost completely lost this status. 53% respondents use social media as a source of information, while only 36% use TV for that purpose. 20% mentioned messaging apps an important source of information; such apps (particularly Telegram) currently occupy an intermediate status between a social media network and a messaging app (as an instrument of private correspondence). A respondent could choose several options when answering the question about the sources of information, so TV's loss of influence is most striking in the share of respondents who do NOT consider television to be a source of information: 64% of the sample (100% - 36%), i.e. almost two-thirds.

*Chart 2.1 Sources of information, % of the general survey population, N=3636.*

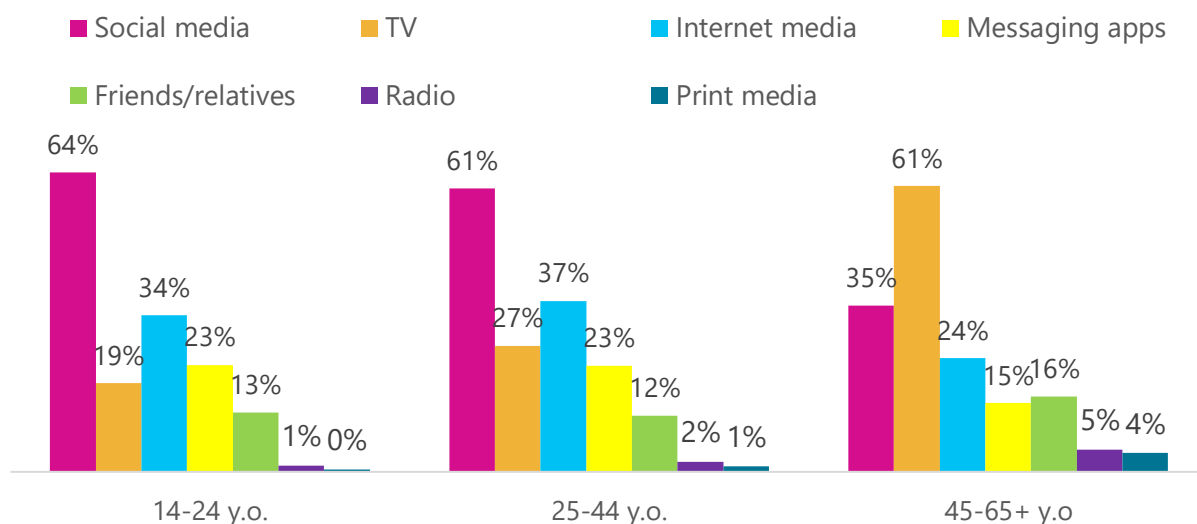
*The sum exceeds 100% as multiple answers could be given.*



The analysis of preferred sources of information by age group suggests that the role of TV as a source of information is likely to decline further in the coming years. In the age group 45+, 61% of respondents use TV in this capacity, in the 25-45 age group, 27%, and in the 14-24 age group, only 19%. An example of an information channel with a stable standing would be "friends/acquaintances": in all age groups, the share of respondents who trust this channel is stable (12% - 16%), with no significant regional differences either.

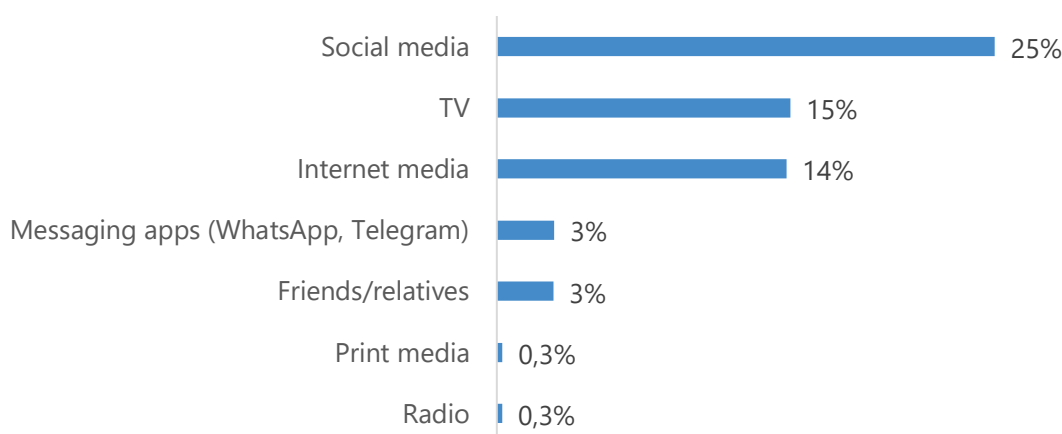
*Chart 2.2 Sources of information by age, % of group.*

*The sum exceeds 100% as multiple answers could be given.*



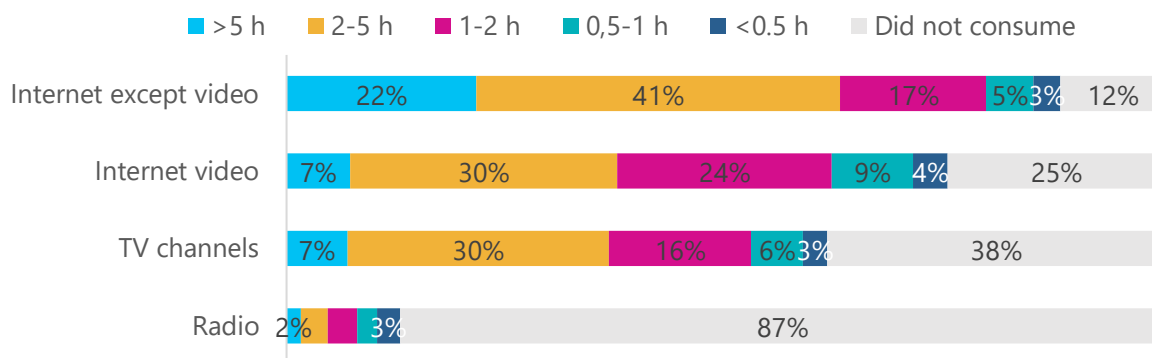
It is worth noting that 60% of those surveyed use a single primary source of information. Among those who have a clear single preferred channel, one in four consumes information exclusively through social media, 15% remain loyal to TV, and 14% prefer Internet-based mass media.

*Chart 2.3 Share of those who mentioned a SINGLE source of information, % of the general survey population.*



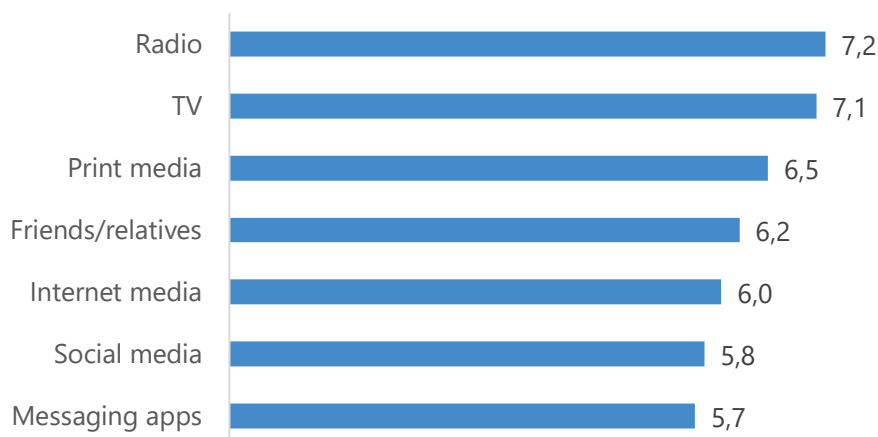
Survey results allow us to compare how much time per day respondents devote to the main media channels, as well as their degree of trust in these channels. As can be seen from the data below, the Internet, on average, occupies significantly more time in people's life than TV. Internet video time alone roughly corresponds to TV time, and all other content incoming via the Internet attracts respondents for significantly more time than television. Meanwhile, more than a third of the population (37%) spend an average of 2+ hours day watching TV.

*Chart 2.4 Average time spent on information channel a day, % of the general survey population, N = 3636*



As for "trust" in different information channels, traditional media enjoy a higher level of trust: radio, TV and print media are more trusted by their viewers/readers/listeners than information from the Internet. Apparently "trust" itself is not a determining factor in choosing an information channel: interest, usability, and diversity are more important criteria.

*Chart 2.5. Average score of trust in information channels. Answers of respondents who mentioned the information channels as one of the main ones*

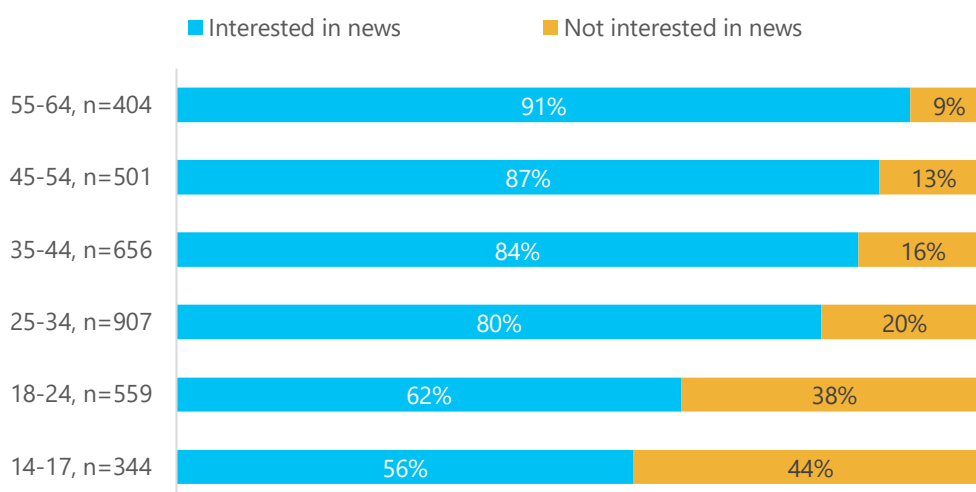




## 2.2. Interest in and practice of news consumption

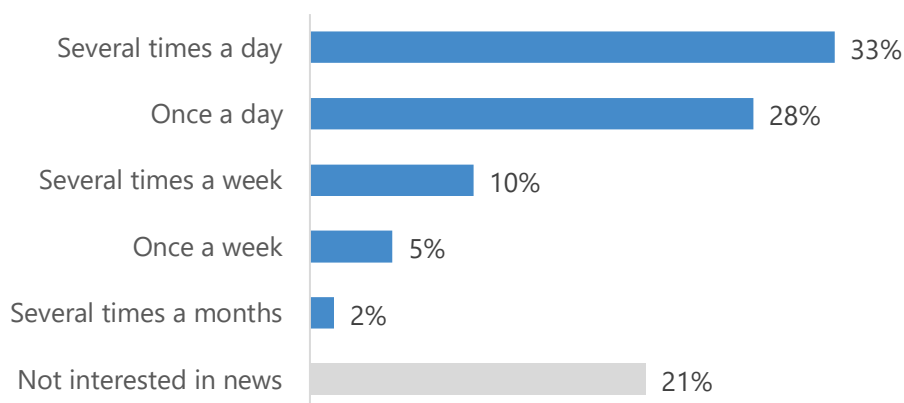
Within the framework of the study, particular attention was paid to the consumption of news. In general, 79% respondents are interested in news. The share of those interested in news is lower among young people than in other age groups; the higher the age, the higher the share of those interested in the news agenda.

*Chart 2.6. Interest in news by age. % of groups*



Notably, half of the country's population follow the news continuously and watch/listen/read the news once daily or more.

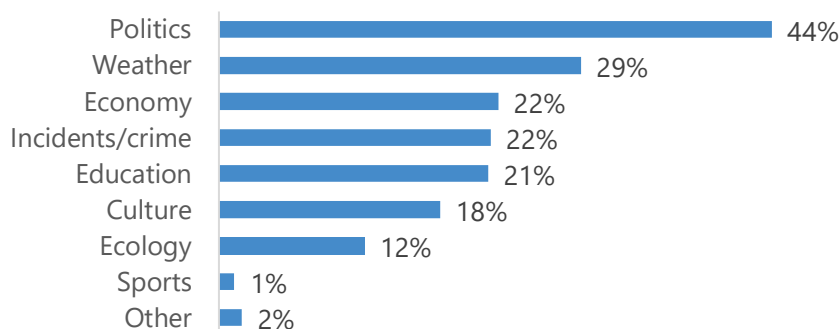
*Chart 2.7. Frequency of news consumption. % of the general survey population*



Of the news agenda, respondents are most often interested in politics and weather forecasts. Economy, education, culture, and incidents are of interest to the residents of the KR in approximately equal measures. Somewhat unexpectedly, sports was the least popular news subject, mentioned by only 1% of respondents. As we will see below in the analysis of TV channels popularity, the actual interest in sports is much higher, and a specialized sports channel is rather

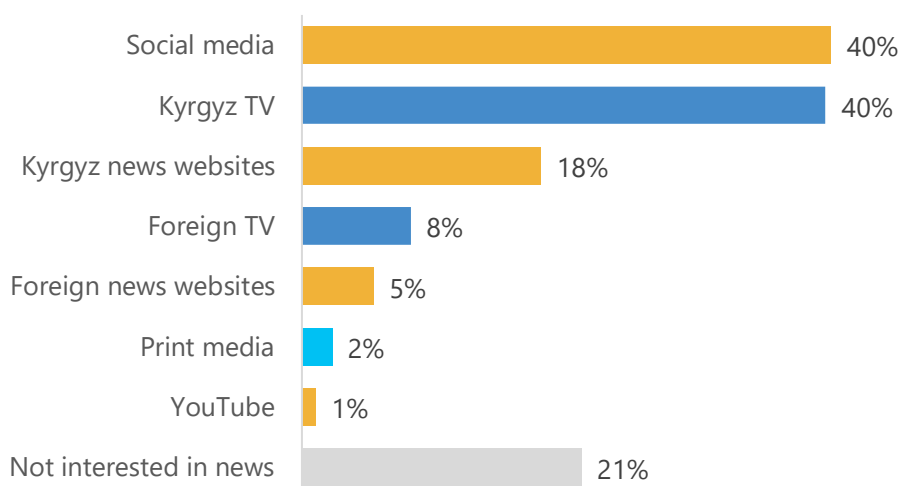
high in the ratings. Perhaps the Kyrgyz people prefer watching sports directly to checking the news about their results.

*Chart 2.8. Interest to news by subject. % of the general survey population, the sum exceeds 100% as multiple answers could be given.*



As noted above, social media are replacing TV as the main source of information in general. However, as for news alone, TV still maintains at least an equal standing with social media, and is perceived as more trustworthy.

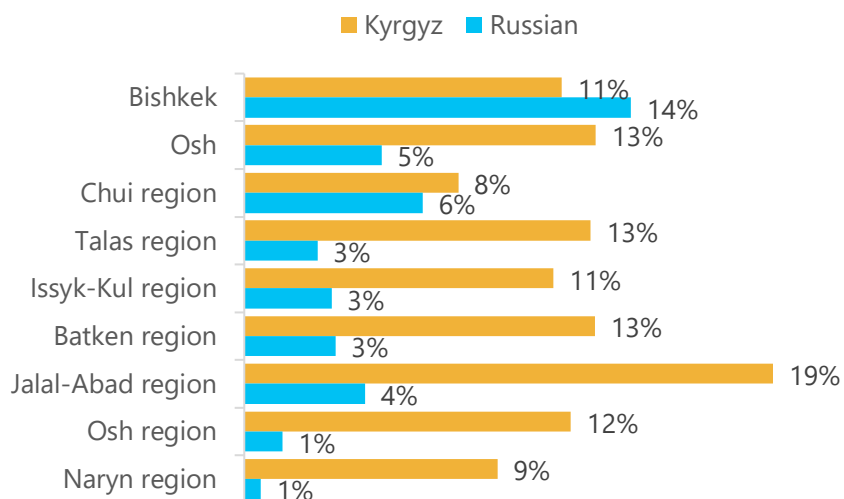
*Chart 2.9. Sources of news. % of the general survey population, the sum exceeds 100% as multiple answers could be given*



We shall speak in more detail about the priorities in interest in social media and Kyrgyz news sites in Sections 5 and 6. Here, we will only note that among respondents who prefer to read news in Kyrgyz news websites (18% of the sample as a whole), two thirds (12% of the sample) prefer to read these news in Kyrgyz, and one third (6% of the sample), in Russian; this proportion remains in all age groups. As for region, only in Bishkek does the share of those who prefer Russian-language news in Kyrgyz news websites prevail; in other regions the Kyrgyz language holds a significant advantage.

*Chart 2.10. Language preferences in Kyrgyz news websites by region. % of groups*

In what language do you prefer to consume the news?

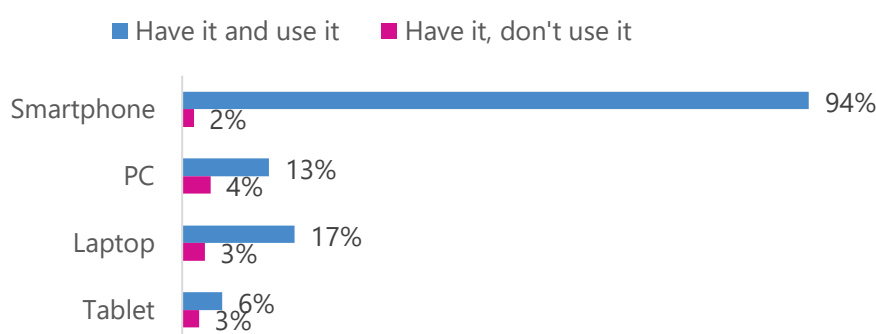


## 3. TV

### 3.1. Access to TV

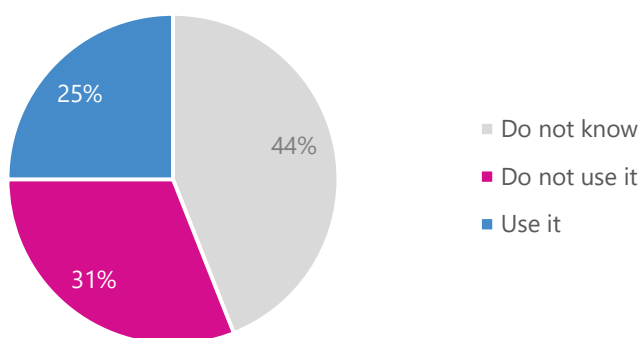
89% of the households surveyed have a TV set; this figure has remained stable over recent years. But a TV set has long ceased to be the only source not only of media consumption but even of TV consumption. Therefore, when studying channels of information consumption, one should not ignore the presence of other digital devices in households. Smartphones are available and used in 94% of households, with PCs, laptops and tablets much less common (13%, 17% and 6% respectively).

*Chart 3.1. Availability/use of digital devices, % of the general survey population, N=3636*



More than half of the population (56%) know that TV can be watched not only through a TV set but also through other devices, and a quarter use these features.

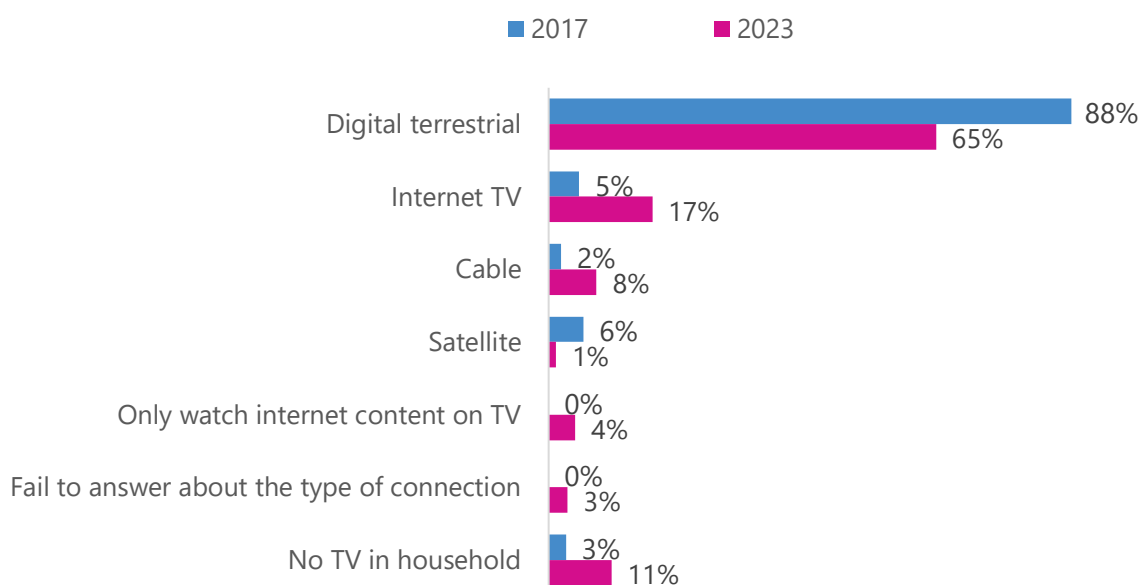
*Chart 3.2. Usage of digital devices for TV consumption. % of the general survey population, N=3636*



Internet TV and cable TV are increasingly popular, reducing the share of terrestrial TV and almost fully displacing the satellite mechanism of TV broadcasting over the last 6 years. The share of respondents using terrestrial digital TV has decreased over 6 years, from 88% to 65%, although it remains the main means of TV signal delivery for the country's population. The standing of Internet TV is strengthening, with the highest share is in the capital (23%), Chui region and the city of Osh (22% each). The relatively high share of cable TV penetration in Batken region is also worth mentioning (16% vs. 8% sample average).

*Chart 3.3. Type of connection used. % of the general survey population*

What type of TV do you have access to at home?



TV is gradually losing its standing as a source of media content among the population of Kyrgyzstan. Last-6-month TV audience (which includes not only TV set users but also those who watched TV programs via TV channels' websites and official apps) was 78% in Kyrgyzstan, almost 20 p.p. lower than in 2017. Average weekly audience (the share of those who watched TV at least 1 day last week) was 71%, and the "active audience" of TV viewing (those who watched TV the day before the survey) decreased even more noticeably, from 69% to 37%.

Chart 3.4. TV penetration funnel. % of the general survey population, N=3636

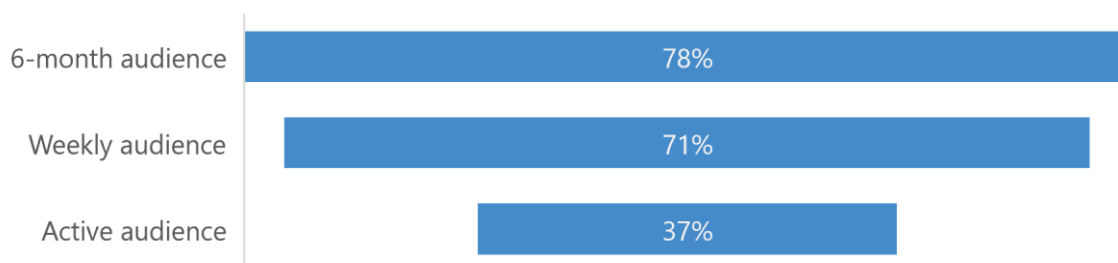
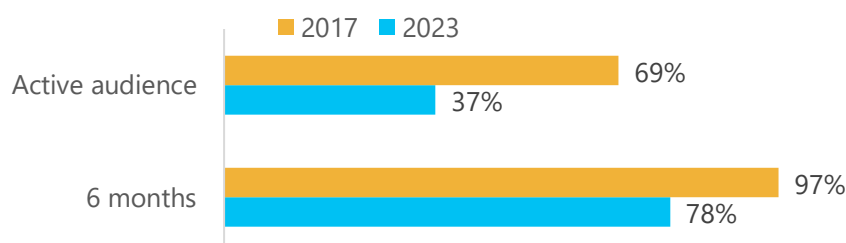
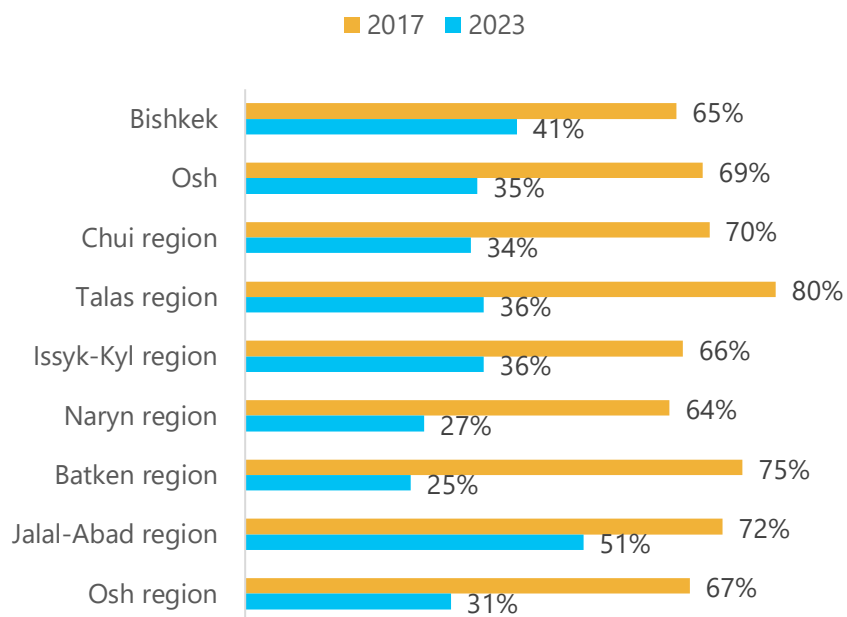


Chart 3.5. TV penetration trend % of the general survey population



As for regional trends, the most noticeable decrease in the active TV audience was noted in Batken region, where it decreased threefold, from 75% to 25%. Residents of Jalal-Abad region (51%) and Bishkek (41%) remained the most loyal to TV; in these regions, the decrease over the past 6 years was the least significant.

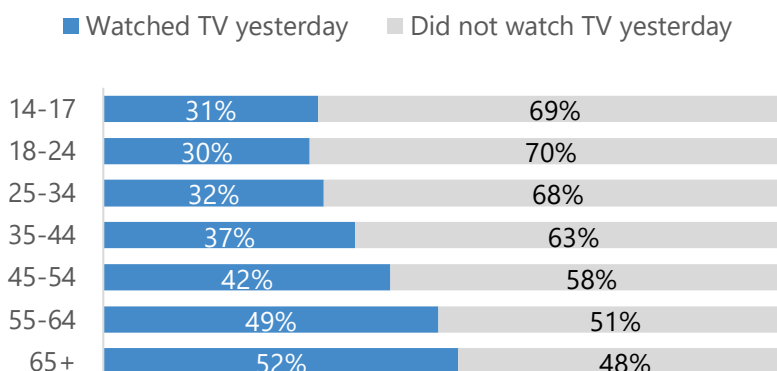
Chart 3.6. Trends of active TV audience by region % of groups



## 3.2. Profile of active TV audience

Let us examine the profile of the active audience of TV, which, as we said above, makes up 37% of the population aged 14+. Among respondents under 35, the share of active audience is 30-32%. It grows in proportion to age, reaching 52% in the 65+ age group. Thus, a trend can be observed: the older the age group of the population, the greater the share of active TV audience in it.

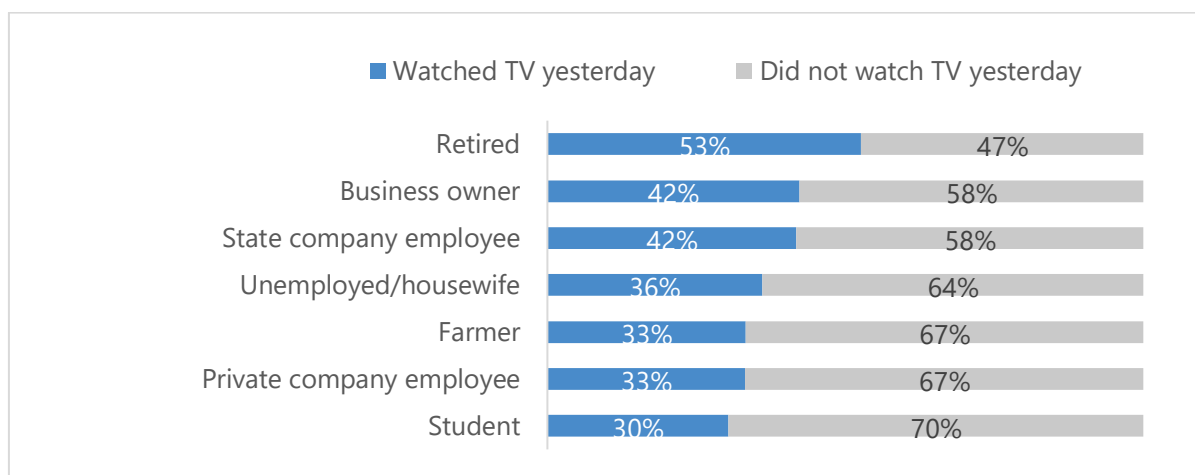
Chart 3.7. Active TV audience, age, % of groups



The share of active audience in the most affluent groups is below average: among respondents with income of 60 thousand+ per household per month, the active viewership is 30%. However, the level of education does not directly impact TV viewing activity. The shares of active TV audience are approximately equal in the two largest groups: among respondents with secondary (37%) and higher (38%) education. The share of active TV audience also does not differ between men and women, amounting to 37%.

However, the share of active TV viewers depends on the type of employment. The largest number of active viewers is observed among the retired, business owners, and employees of state companies.

Chart 3.7. Active TV viewership, type of employment, % of groups

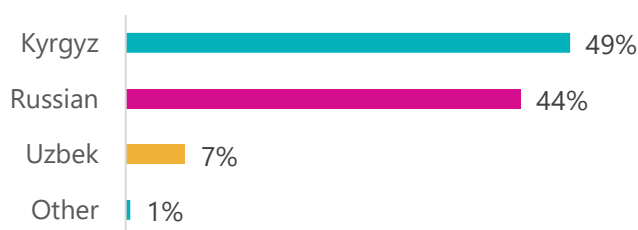


It should also be noted that in the households where Kyrgyz and Russian are spoken, the share of "active" TV audience is almost equal, 37% and 43% respectively. As mentioned above, the share

of households where Kyrgyz is the main language is much higher than the share of Russian-speaking households (73% vs. 12%), so one could expect that the preferred language of TV viewing would be Kyrgyz. However, the data show otherwise: among the active TV audience, the share of those who prefer TV in Kyrgyz and Russian is almost equal, 49% and 44% respectively, as more than a third (35%) of respondents from Kyrgyz-speaking households in the active TV audience prefer watching TV in Russian.

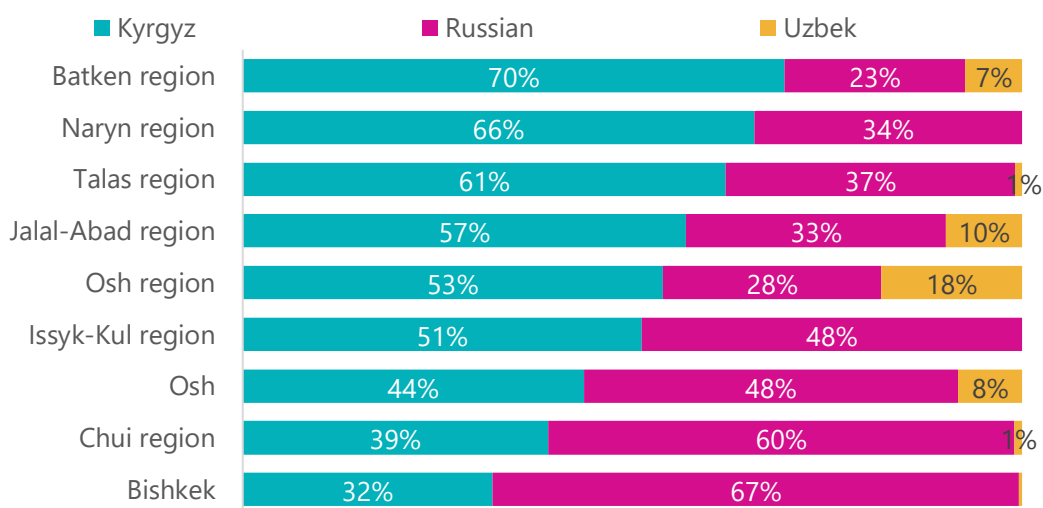
We should also that only half of the respondents from Uzbek-speaking households prefer Uzbek-language TV, with the rest divided in equally between Kyrgyz and Russian content.

*Chart 3.8. Preferred TV viewing language among the active audience. Data as % of "active audience" (37% of the sample, N = 1348)*



However, the language preferences of the active TV viewership differ markedly by region. The highest share of those who prefer Kyrgyz-language TV is in Batken region (70%), and the highest share of those who prefer Russian-language TV is in Bishkek (67%). Uzbek-language TV is most popular in Osh (18%) and Jalal-Abad (10%) regions, but even there a majority of viewers prefer to watch TV in Kyrgyz and Russian.

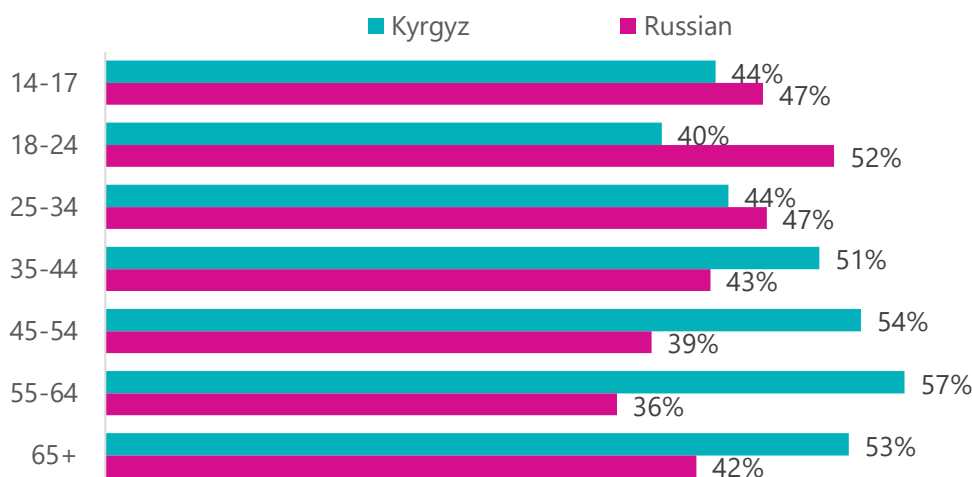
*Chart 3.9. Preferred TV language by region. Data as % of 'active viewership' groups*



There is a noticeable correlation between age and the preferred language of TV content: the older the respondents are, the higher the share of those who prefer Kyrgyz-language TV among them.

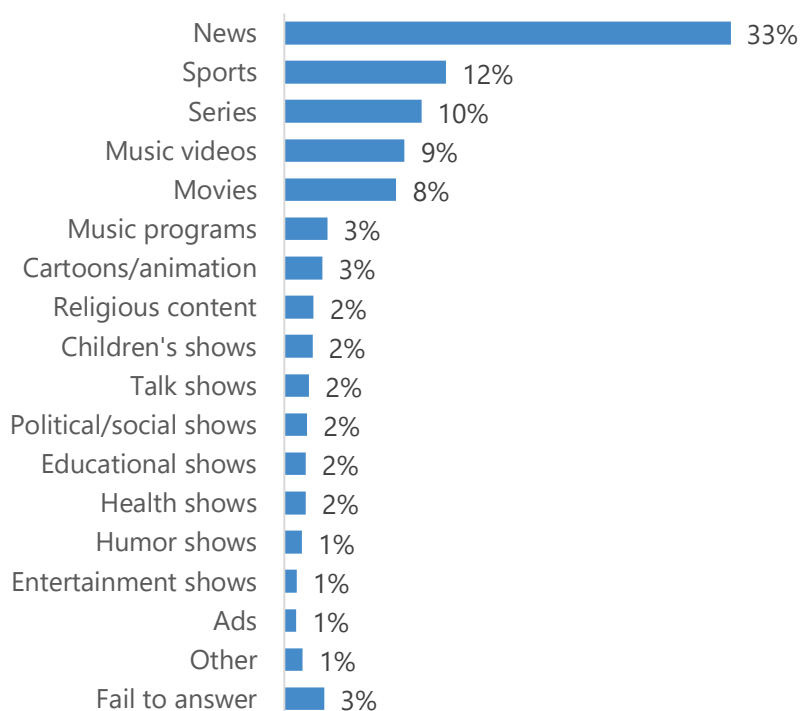
*Chart 3.10. Preferred TV content language by age. Data as % of 'active viewership' groups*





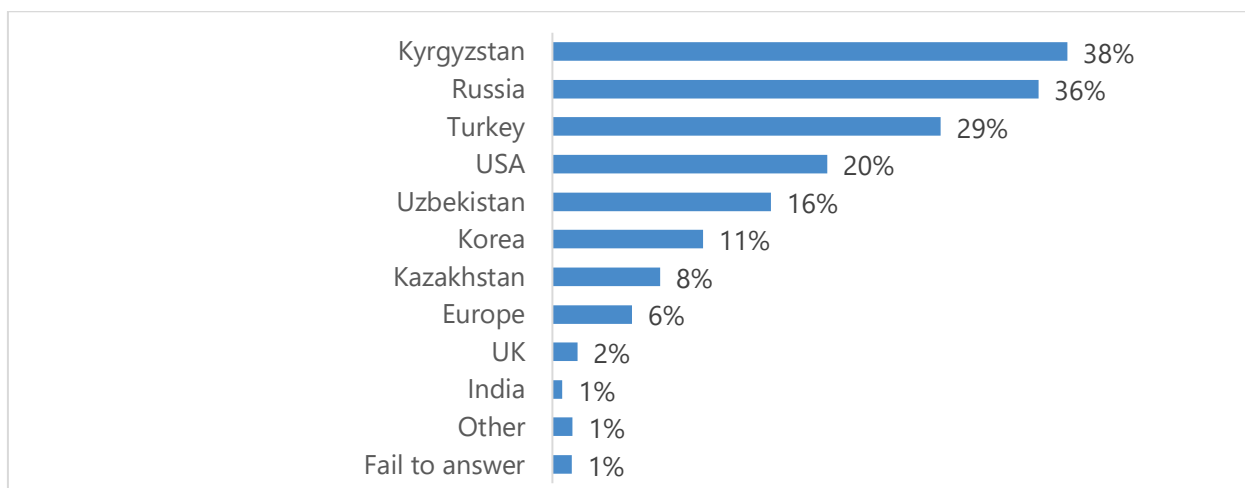
As for preferred TV content, the question about the preferred content of TV programs was asked to all respondents, including those who do not currently have a TV set at home and those who have not watched TV recently. It turned out that one third of the respondents prefer to use TV for watching news, with the second place occupied by sports programs, followed by series (10%) and music (10%).

Chart 3.11. Preferred type of TV content. Data as % of the general survey population, N=3636



Fans of movies and TV series divide their preferences between content from different countries. Kyrgyz and Russian video content are slightly ahead of Turkish content by popularity; one in five respondents like American movies, and 16% enjoy watching Uzbek movies and TV series. In Batken, Osh and Jalal-Abad oblasts, the share of fans of Uzbek films is over a quarter, at 27%, 26% and 29% respectively. Korean movies and films are enjoyed by 11% of respondents; this indicator is noticeably higher among the younger population, at 17% among teenagers and 19% among respondents aged 18-24.

Chart 3.12. Preferred countries of movie/series production, multiple answers could be given, n=3636



### 3.3. Media indicators. TV

A very important factor in the TV industry are media indicators, which are used as a basis for assessment of the TV market. Media indicators are crucial for TV channels, advertising agencies, advertisers, as well as other representatives of the media industry and users of media data.

When analyzing the media market, in international practice, a number of indicators are used, presented in Table 3.1.

*Table 3.1. Media indicators for TV*

<b>Average daily rating (ADR)</b>	Average daily active TV viewers as a percentage of the country's population aged 14+
<b>Average weekly rating (AWR)</b>	Average weekly active TV viewers as a percentage of the country's population aged 14+
<b>Rating</b>	Average share of the population who watched a particular program/channel in a particular time slot during the day, as a percentage of the country's population aged 14+
<b>Share</b>	Share of TV viewing of a particular TV channel at a particular time of day and total average share per day as a share of the total daily TV viewing time of all TV viewers aged 14+

Within the framework of this study, in accordance with the methodology developed in cooperation with international experts in the field of media measurement, M-Vector experts calculated the average daily (ADR) and weekly (AWR) TV audience in general and by individual channels, as well as the average share of TV viewership (Share) and ratings of TV channels (Ratings).

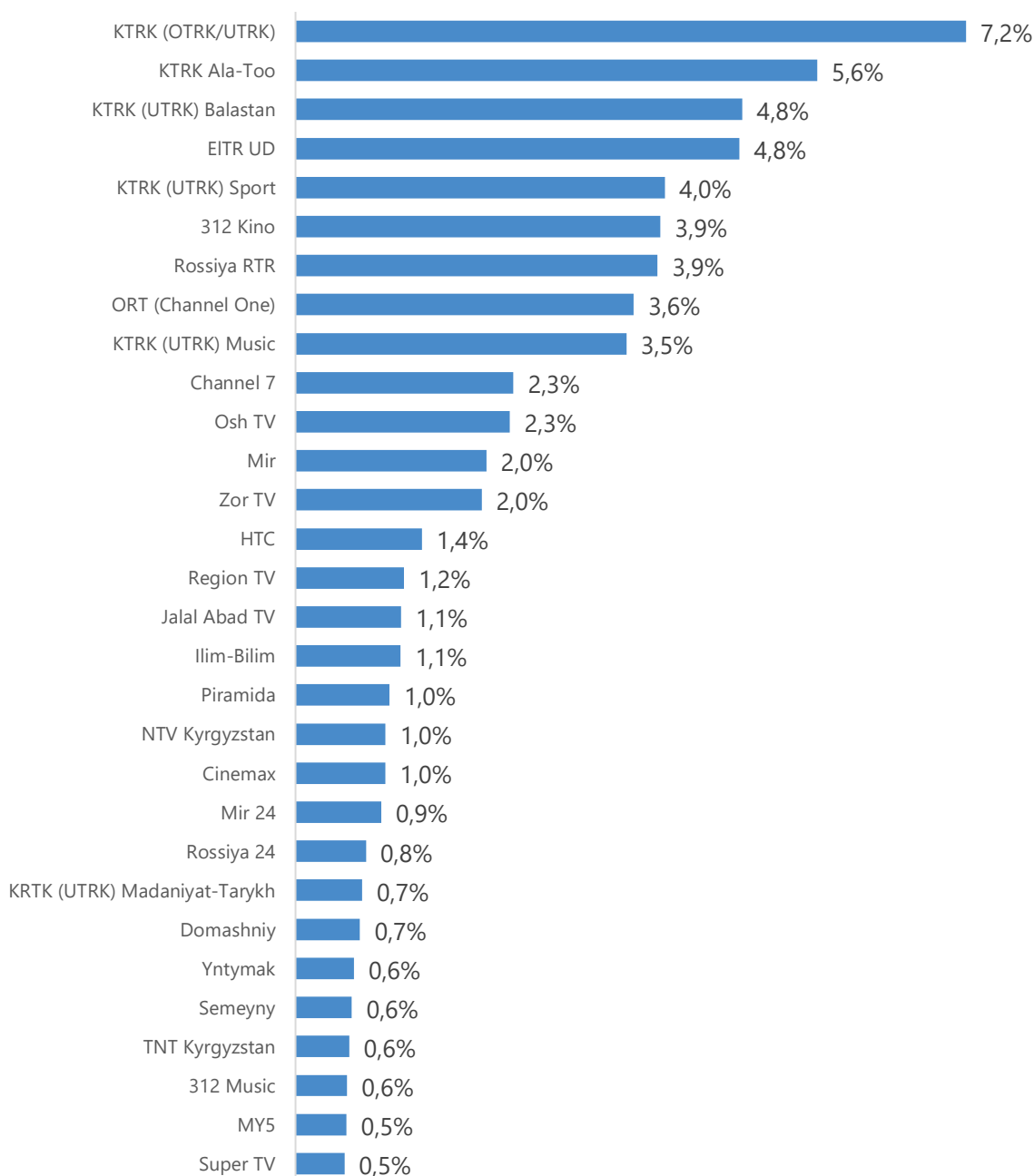
We shall analyze the rating of TV channels by daily and weekly audience coverage in the country and per individual regions. For the study, data on several dozen TV channels was gathered; this report includes data on the top 30 in each section, and more detailed information can be found in the Appendices.

#### **Average daily (ADR) and weekly (AWR) ratings**

In general, as we indicated above, the daily audience of all TV channels is 37% of the population. In other words, on average, a little more than a third of Kyrgyzstan population watch TV channels in a day (using a TV set or online; only live viewership included). As compared to the previous measurement in 2017 (69%), this parameter has dropped radically, so it is not surprising that the ADR indicator has decreased for all TV channels. We propose to focus not on the trends in the indicators per each channel but on the change in their places in the ratings.

In the country as a whole, KTRK is in the lead with 7.17%, followed by KTRK Ala-Too 24 (5.58%) and KTRK Balastan (4.78%). The Russian TV channels Rossiya and Channel 1 are in 7th and 8th places respectively.

Chart 3.13. Average daily viewership (ADR, TOP 30) in country as a whole. Data as % of the general survey population



As compared to 2017 data, the position of Ala-Too 24 channel has improved the most among the top 10, rising from 6<sup>th</sup> place to 2<sup>nd</sup>, while the music channel KTRK Music has shown the largest drop, from 2<sup>nd</sup> place to 9<sup>th</sup>. Russian TV channels showed multidirectional trends: Rossiya (RTR) strengthened its positions, rising by 2 places, while Channel One lost 5 positions, moving from 3<sup>rd</sup> place to 8<sup>th</sup>. 312 Kino and Channel 7 have both risen by 5 positions since 2017.

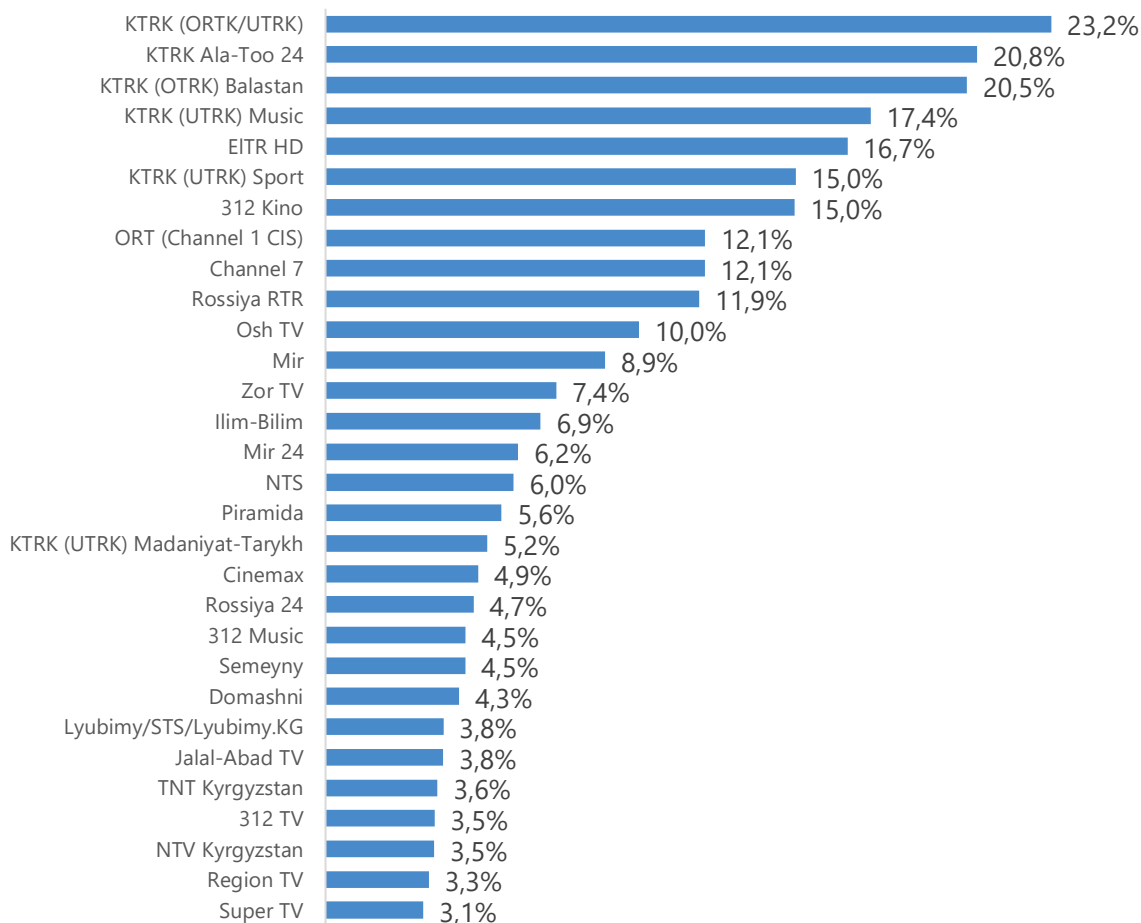
Table 3.2. Trends of TV channels' positions in top 10 by ADR

TV channel	2017	2023	Trend
KTRK (OTRK / UTRK)	1	1	=
KTRK Ala-Too 24	6	2	+4
KTRK (UTRK) Balastan	4	3	+1
EITR HD	7	4	+3
KTRK (UTRK) Sport	8	5	+3
312 Kino	11	6	+5
Rossiya RTR	9	7	+2
ORT (Channel One CIS)	3	8	-5
KTRK (UTRK) Music	2	9	-7
Channel 7	15	10	+5

The average weekly share is calculated by calculating the average active audience per each day of the week, not simply by multiplying the average daily audience by 7 days, since on some days of the week the average daily audience may be smaller, and on other days, larger. This indicator is also based on the question “which TV channel you watched at least once during the last week?”.

On the country level, the KTRK group of TV channels is leading both by the size of weekly and daily audience. EITR is already 5th by this indicator. The positions of other TV channels in the weekly audience ratings have also changed as compared to the daily audience.

*Chart 3.14. Average weekly audience (AWR, Top 30) by country as a whole. Data as % of the general survey population*



In terms of AWR, as well as ADR, compared to the data of 2017, Ala-Too 24 channel strengthened its standing in the top 10 the most. At the same time, KTRK Music TV channel weakened its position by AWR to a lesser extent than by ADR.

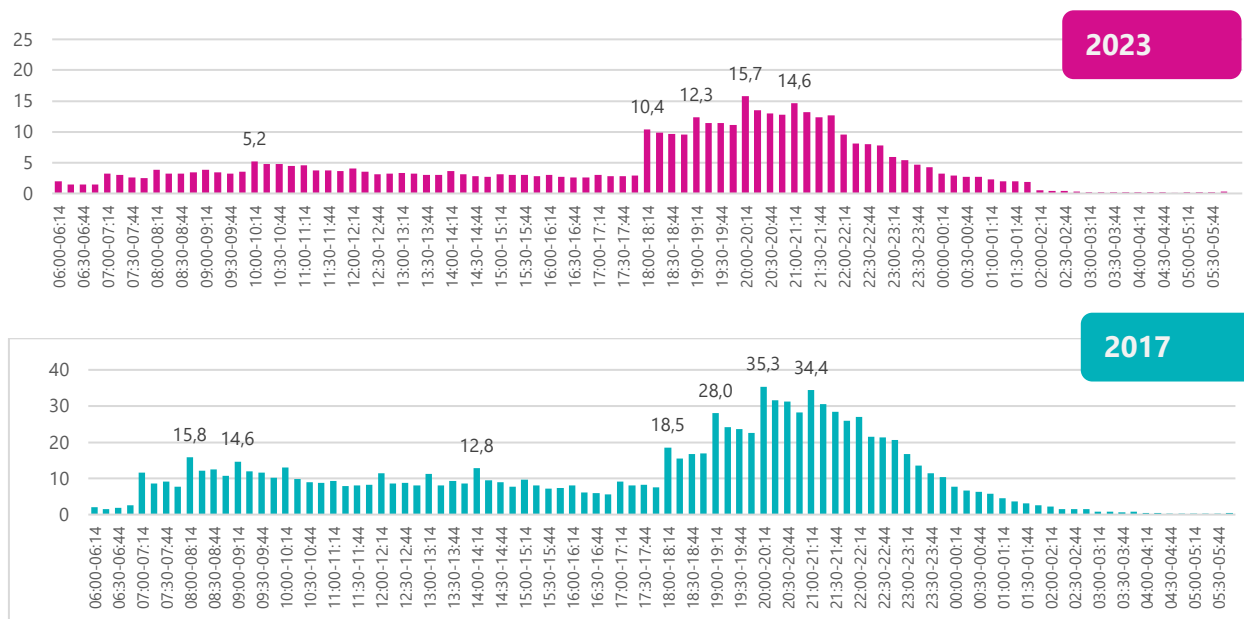
Table 3.3. Trends of TV channels' AWR, top 10

TV channel	2017	2023	Trend
KTRK (OTRK / UTRK)	1	1	=
KTRK Ala-Too 24	6	2	+4
KTRK (UTRK) Balastan	3	3	=
KTRK (UTRK) Music	2	4	-2
EITR HD	7	5	+2
KTRK (UTRK) Sport	9	6	+3
312 Kino	14	7	+7
ORT (Channel One CIS)	4	8	-4
Channel 7	16	9	+7
Rossiya RTR	12	10	+2

## PRIME TIME

In the context of TV, for many years it was customary to talk about "morning" and "evening" prime time - the periods of the greatest viewer activity in the morning and evening hours. Today we can say that the concept of "morning prime time" in Kyrgyzstan has lost its relevance for TV. In the first half of the day, only in one time segment (10-10:15 AM) does the share of viewers exceed 5% (5.2%) of the country's population, and in general it changes very little. "Evening prime time", on the other hand, remains relevant. As before, it starts at 18:00 and continues until 23:00, when the share of active viewers returns to under 5% of the population. Comparison with 2017 data clearly shows that the morning prime time has "dissolved", displaced by information consumed via smartphone on social networks and messaging apps.

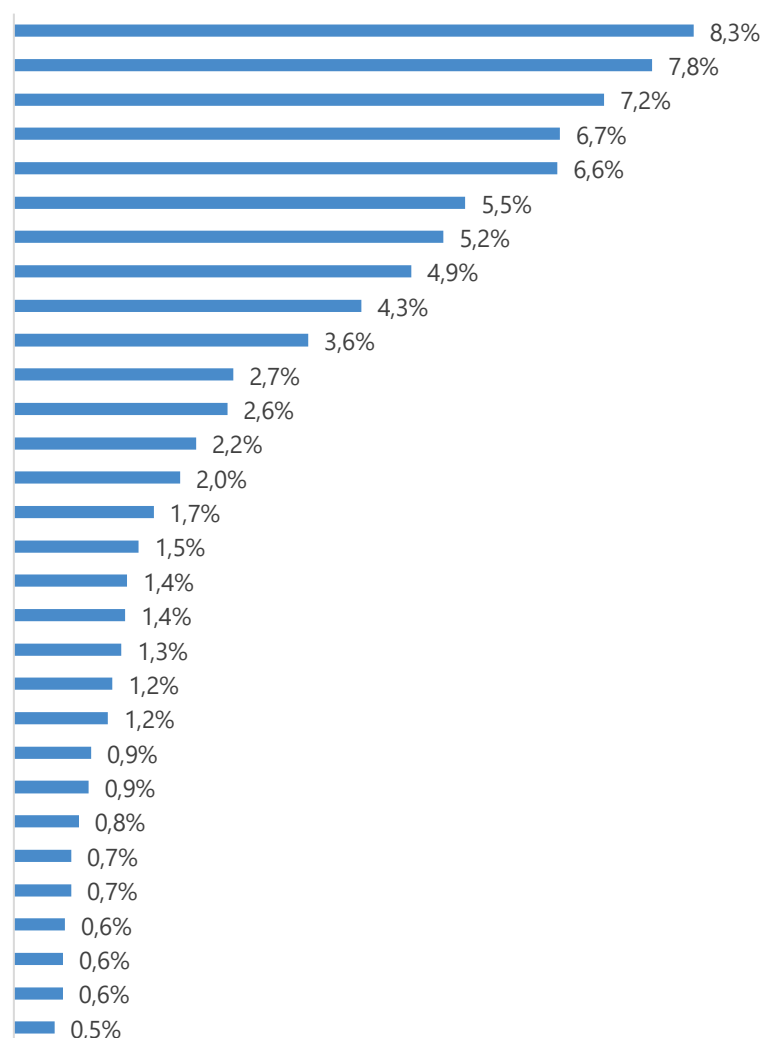
Chart 3.14. Audience share by time of day. Data as % of the general survey population



Share of overall daily TV viewing– Share

The Share indicator shows what share of time from the total daily TV viewing of all TV viewers is occupied by a particular TV channel. On the basis of this indicator, one can draw conclusions as to which TV channels are watched for longer, and which ones for shorter periods of time. The positions of TV channels by audience size and share of viewing time may differ. This is explained by the fact that such indicators as ADR, AWR and Ratings are better at showing the audience coverage, while Share better shows the duration of viewing a particular channel. In country as a whole, KTRK is the leader by Share (as well as by ADR and AWR), but further rankings of the most popular TV channels differ. In terms of Share, Russian TV channels have noticeably stronger standings than by ADR and AWR: Rossiya (RTR) is second, and Channel One is fifth. Otherwise, the picture in the country as a whole is quite close to the standing of TV channels according to the ADR indicator.

*Chart 3.15. Share, Top 30, in the Kyrgyz Republic as a whole. Data as % of overall TV viewing time*



In a comparison of the distribution of TV channels by Share with 2017, the following changes can be noted: Rossiya (RTR) displaced Channel One from the 2nd place, which dropped significantly to the 6th position; the positions of KTRK Balastan, KTRK Ala-Too 24, 312 Kino and KTRK Sport remained approximately the same, and the position of EITR significantly improved, twofold as compared to 2017, from the 10th place to the 4th place in the general list. Thus, we can conclude

that the structure of the duration of TV viewing of channels has not changed too noticeably, in contrast to the coverage; that is, the reduction of interest in television is even across the board and almost even across the audiences of TV channels.

Chart 3.16. Share, TOP 10, Kyrgyz Republic as a whole. Data as % of overall TV viewing time.

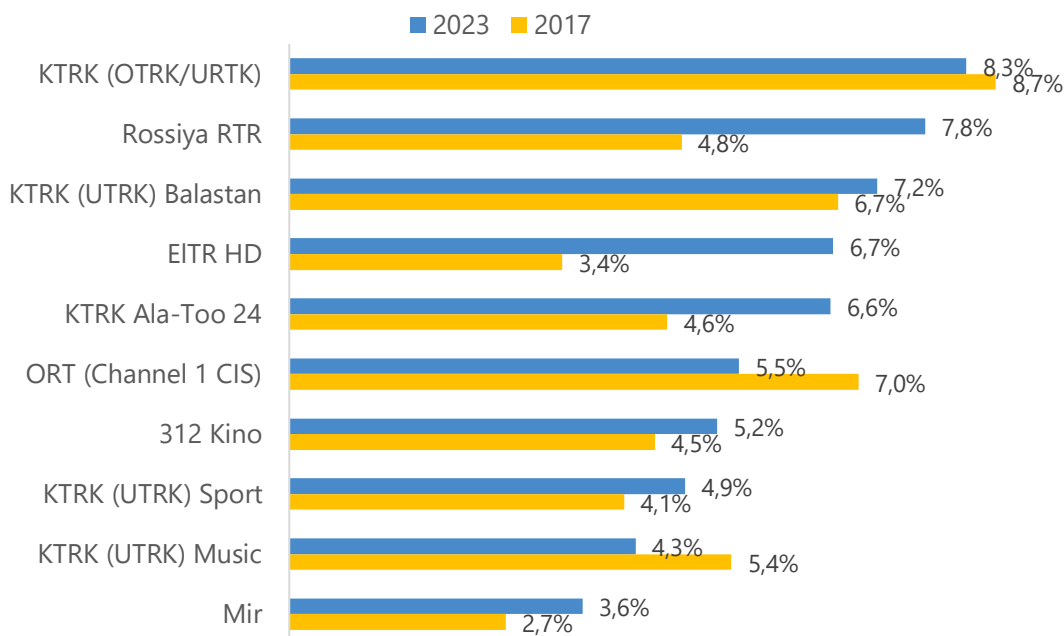


Table 3.4. Trends of positions in Top 10 by Share, 2017 – 2023

TV channel	Place in 2017	Place in 2023	Trend
KTRK (OTRK / UTRK)	1	1	=
Rossiia RTR	5	2	+3
KTRK (UTRK) Balastan	3	3	=
EITR HD	10	4	+6
KTRK Ala-Too 24	6	5	+1
ORT (Channel 1)	2	6	-4
312 Kino	7	7	=
KTRK (UTRK) Sport	9	8	+1
KTRK (UTRK) Music	4	9	-5
Mir	14	10	+4

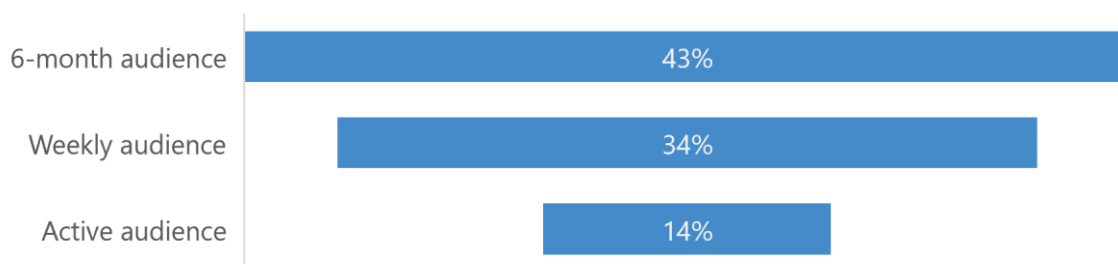


## 4. RADIO

### 4.1. Access to radio and portrait of weekly audience Access to radio and weekly audience portrait

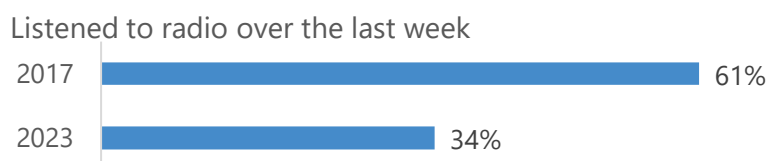
The level of radio listening in Kyrgyzstan remains relatively high, even though it went down over the last 6 years. The average daily audience of all radio station is 14%, weekly audience, 34%, and 6-month audience, 43%.

*Chart 4.1. Radio penetration funnel, % of all persons surveyed, N=3636*



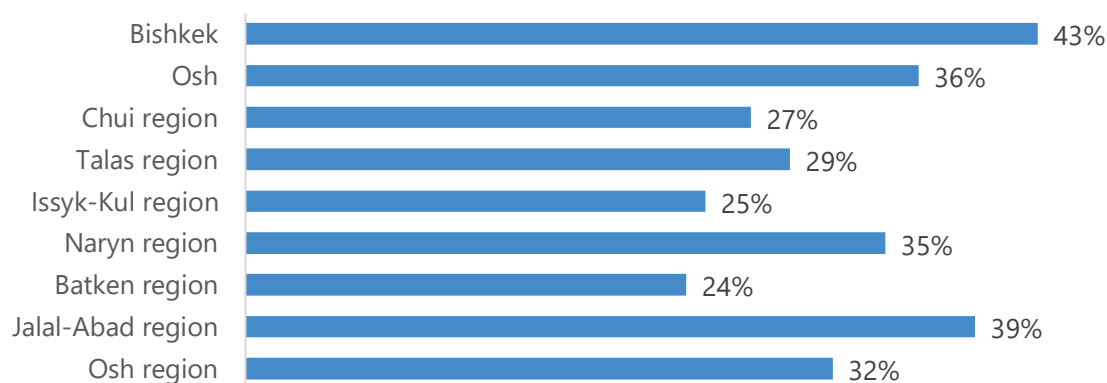
As compared to 2017, the weekly audience as a share of the overall population of the country reduced almost twofold, from 61% to 34%.

*Chart 4.2. Weekly radio audience trends, % of the general survey population*



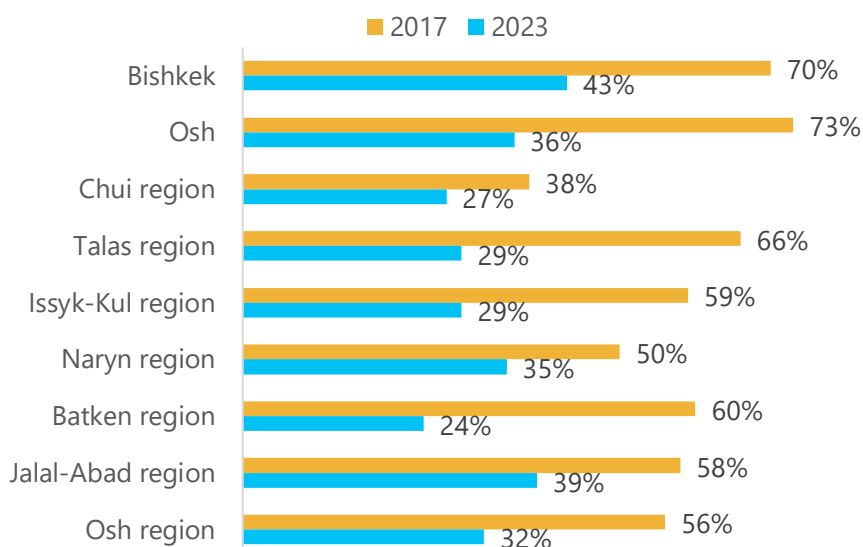
Unlike TV, the share of weekly radio audience practically does not depend on age, but differs noticeably by region. The highest share of active radio listeners is in the capital and in Jalal-Abad region, and the lowest, in Batken and Issyk-Kul region.

*Chart 4.3. Weekly radio audience by region % of groups,*



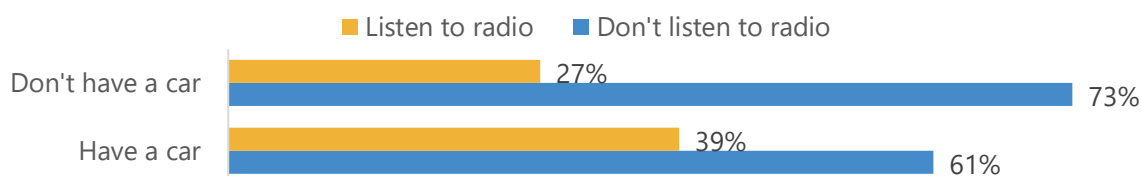
As for the trends of regional specificity of weekly radio audience by regions, four regions stand out where the share of weekly audience decreased more than twofold as compared to 2017: these Issyk-Kul, Talas, Batken regions and Osh.

Chart 4.4. Trends of weekly radio audience by region, % of groups



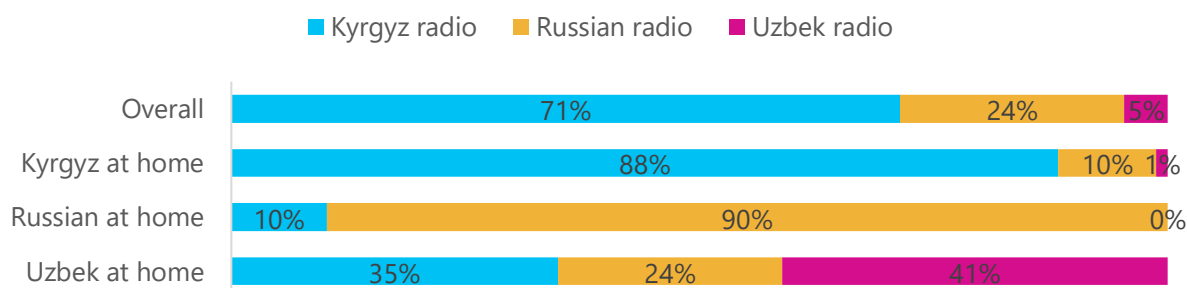
Among men, the share of radio listeners is higher (36%) than among women (31%). Presence of a family car also plays a significant role in radio consumption: not surprisingly, in households with a car the share of radio listeners is noticeably higher than in those households without one.

Chart 4.5. Weekly radio audience depending on presence of car in the household, % of groups



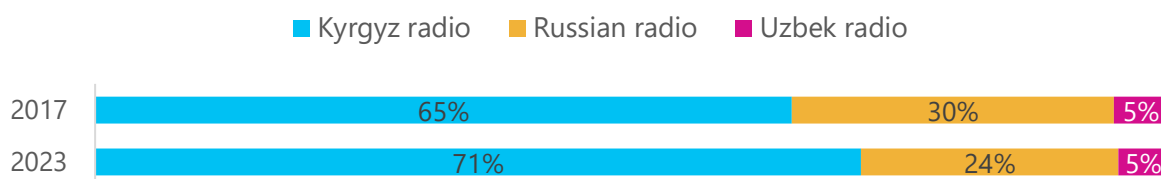
Language preferences in radio consumption almost perfectly coincide with the main language of home communication. 71% of the audience prefer to listen to radio in Kyrgyz. One in four radio listeners (24% of the weekly audience, 8% of the sample as a whole) prefer radio in Russian, 5% (2% of the sample as a whole) - in Uzbek.

Chart 4.6. Language preferences of radio listeners, % of radio consumer groups



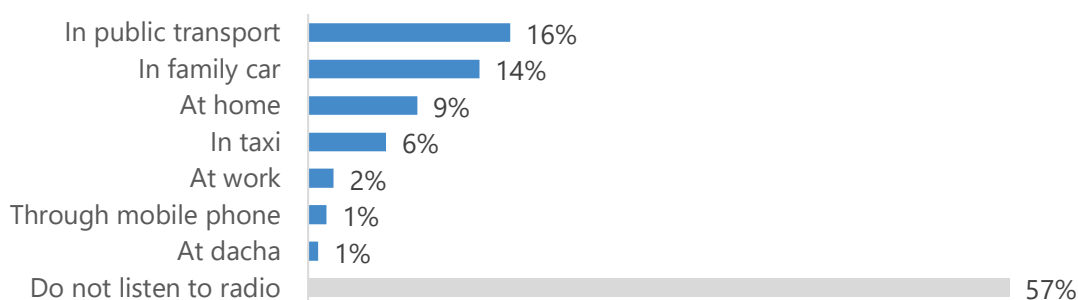
Over 6 years, the distribution of language preferences among radio listeners has not changed significantly: the share of those who prefer Kyrgyz radio content among the weekly audience increased by 6 p.p., and the share of those who prefer radio in Russian decreased accordingly.

*Chart 4.8. Trends in language preferences of radio listeners, % of radio listener groups*



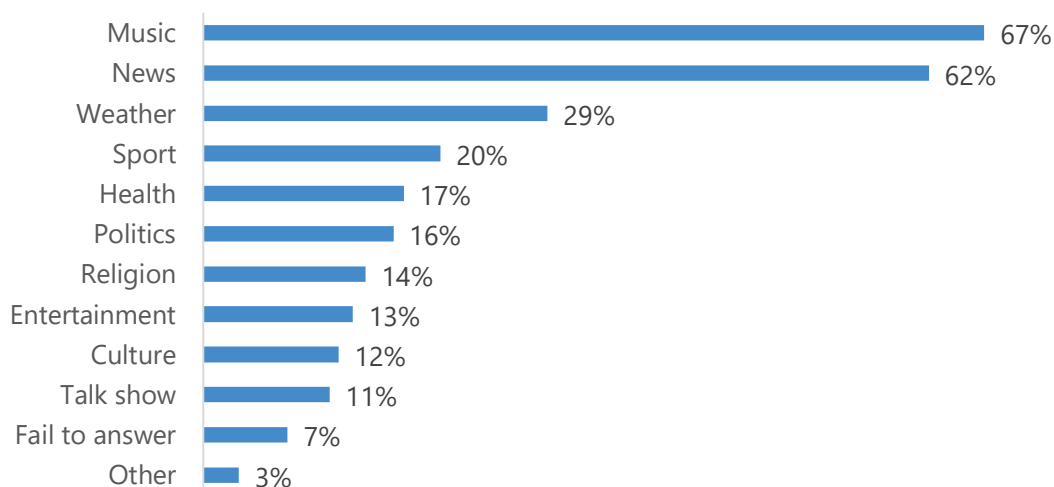
One of the facts about radio consumption is that it is often not voluntary: respondents are forced to listen to the radio in public places or in taxis. Only one in ten respondents (9%) listen to radio at home.

*Chart 4.3. Location of radio consumption, % of the general survey population, Sum exceeds 100%, multiple answers can be given*



As for content preferences in radio content, respondents equally often name "music" and "news"; other topics are of significantly lower interest.

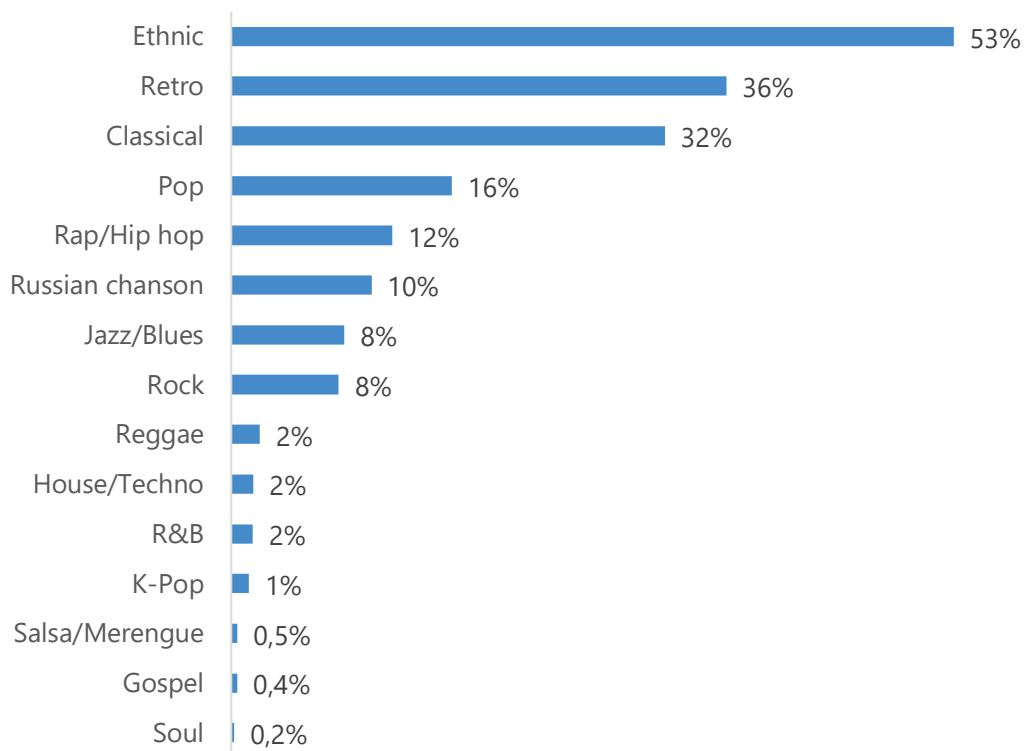
*Chart 4.9. Type of preferred content, % of 'voluntary' radio consumers (not in public transport and not in public spaces) (N=955), Sum exceeds 100%, multiple answers can be given*



Musical preferences of Kyrgyz people are diverse, but ethnic music is in the lead; slightly behind it is "retro" music, as well as, interestingly enough, classical music. Other styles are not very popular among radio listeners. Apparently, those who prefer other styles of music choose other channels

of consumption. Thus, the situation with the music content of radio stations is stagnant: they are not interested in changing their programming, and listeners who prefer other types of music are quitting radio.

*Chart 4.10. Preferred music style, of 'voluntary' radio consumers (N=955), Sum exceeds 100%, multiple answers can be given*



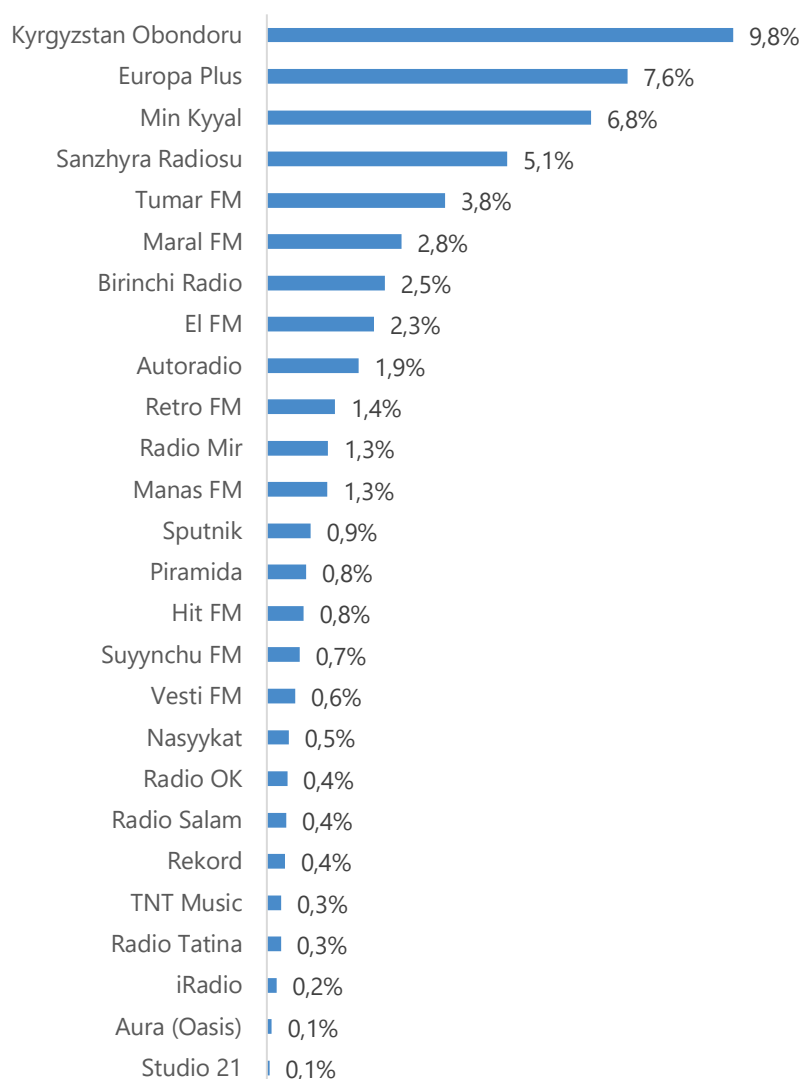
## 4.2. Media indicators. Radio

Within our study, we calculated several media indicators for the radio stations listened to by respondents. We analyzed three main indicators: 1) AWR - the average share of respondents covered by a radio station in a week; 2) Share - the average daily share for each radio station in the total cumulative time spent by respondents listening to the radio and 3) Rating - the share of respondents who listened to the radio in a certain period of time. Detailed information by regions on these indicators is presented in Annex 2.

### Average Weekly Reach (AWR) of radio

26 radio stations were mentioned that the respondents listened to over the last week before the survey (weekly audience). The country-wide distribution of radio station by AWR is as follows: Kyrgyzstan Obondoru is in the lead, followed by Europa Plus and Min Kyyal; and the radio station Studio 21 is in the closing place.

Chart 4.11. AWR for radio, Kyrgyzstan.

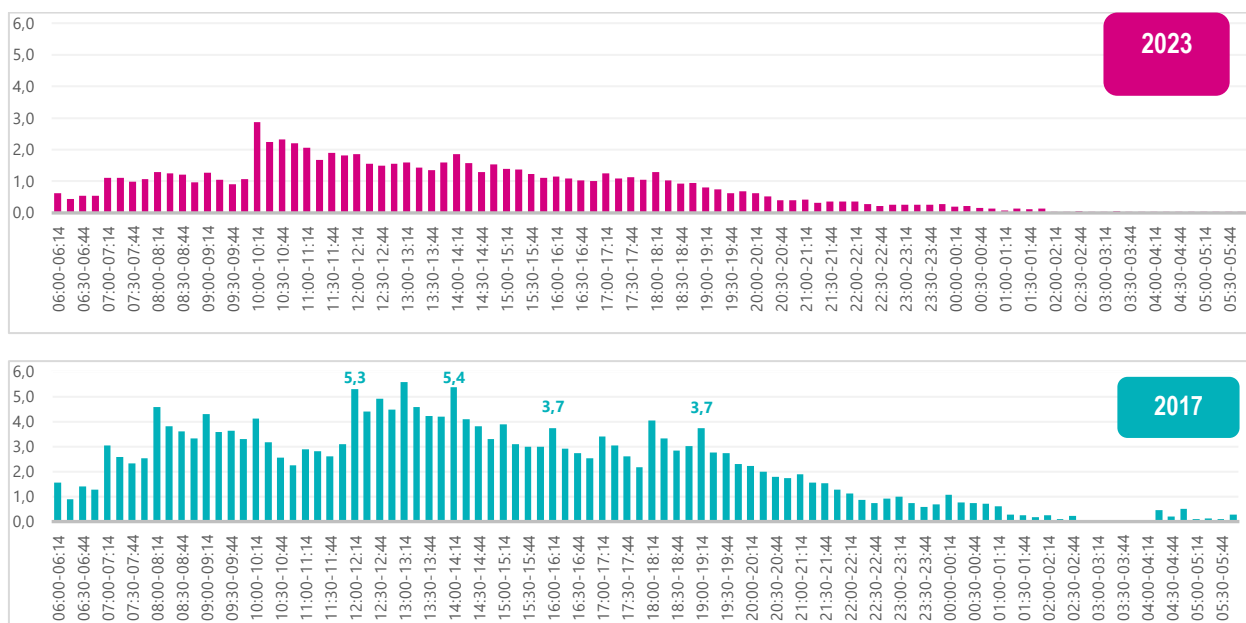


### Rating – Available audience

This indicator shows radio audience at a certain time of day (as a percentage of the total population). There are no clear peaks in daily radio listening times, like there are with TV, since radio listening is less tied to the home — to the contrary: as we have seen, home is far from the main environment where respondents listen to the radio.

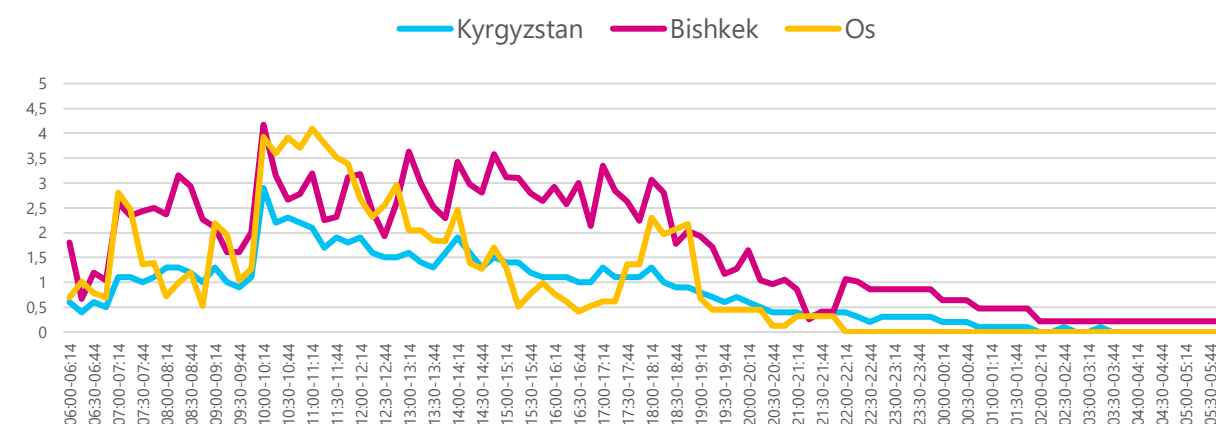
Overall in Kyrgyzstan, a morning peak is notable at 10 AM, after which the radio audience gradually goes down. As compared to 2017 data, we can see an absence of brief peaks in the evening.

Chart 4.12. Rating for radio, Kyrgyzstan, 2023 and 2017



If we compare the dynamics of Rating by hours in Kyrgyzstan and in the two largest cities, Bishkek and Osh, it is obvious that in the capital, listening is more stable during the day - between 9 AM and 6 PM, the share of listeners practically does not decrease. This corresponds to a significant share of radio listeners in the car. In Osh, however, morning and evening peaks are visible.

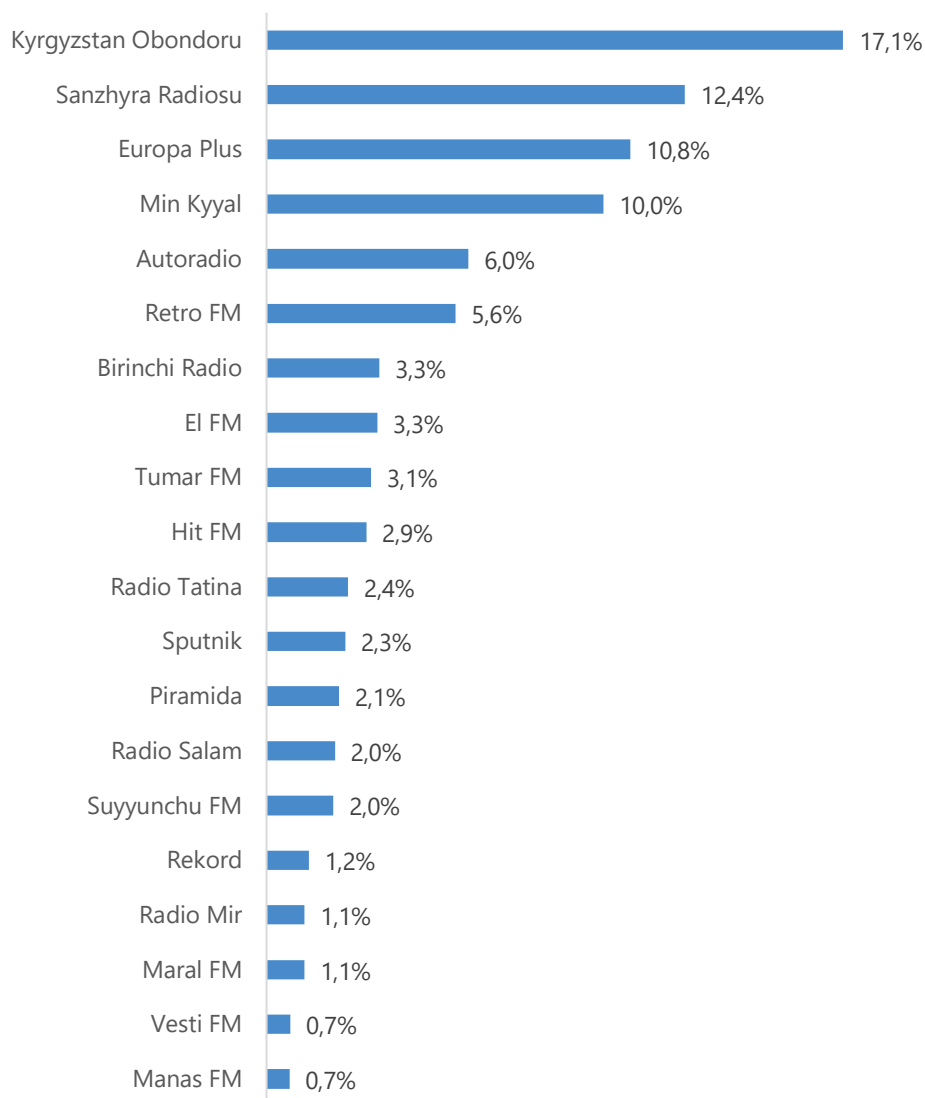
Chart 4.13. Rating for radio, Kyrgyzstan, Bishkek, Osh



**Share – share of total daily radio consumption**

The position on the Share indicator reflects how long people listen to a radio station, on average. Compared to the AWR rating, Sanzhyr, Autoradio and Retro FM have higher positions, which suggests that they have better listener retention.

*Chart 4.14. Share for radio (Top 20), Kyrgyzstan.*

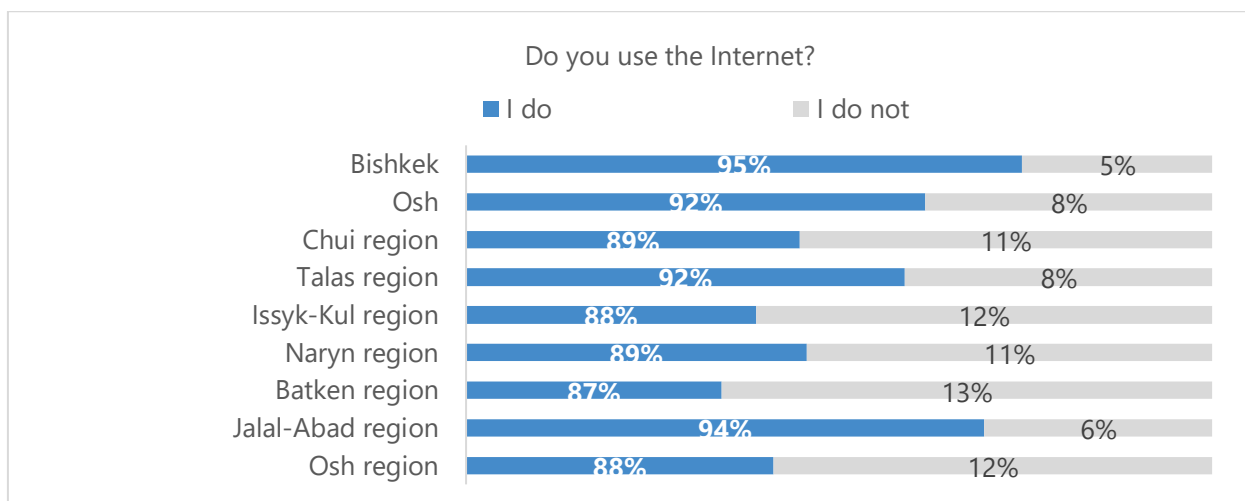


## 5. INTERNET

### 5.1. Profile of Internet users

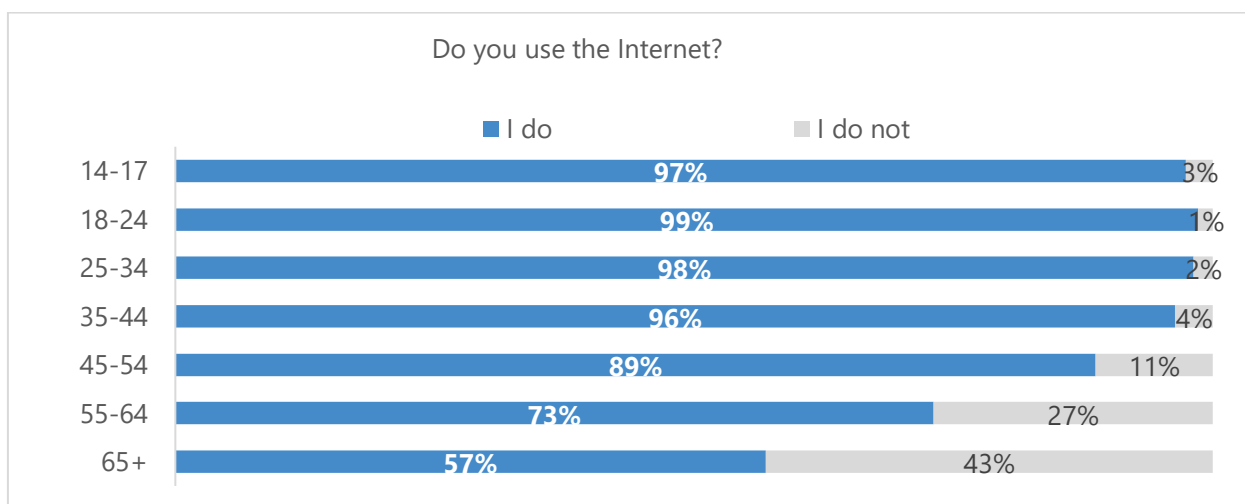
According to the survey, 91% of Kyrgyzstan's residents aged 14+ use the Internet, 32 p.p. more than in 2017 (59%). The highest share of Internet users is observed among the population of Bishkek and Jalal-Abad region, while Batken region has the lowest share of internet users in the country.

Chart 5.1. Internet usage by region



At the same time, the share of Internet users is higher among women (93%, n=1858) than among men (89%, n=1778). The share of Internet users also depends on the age and type of employment: for instance, in older age groups, the share of Internet users is lower than in younger age groups.

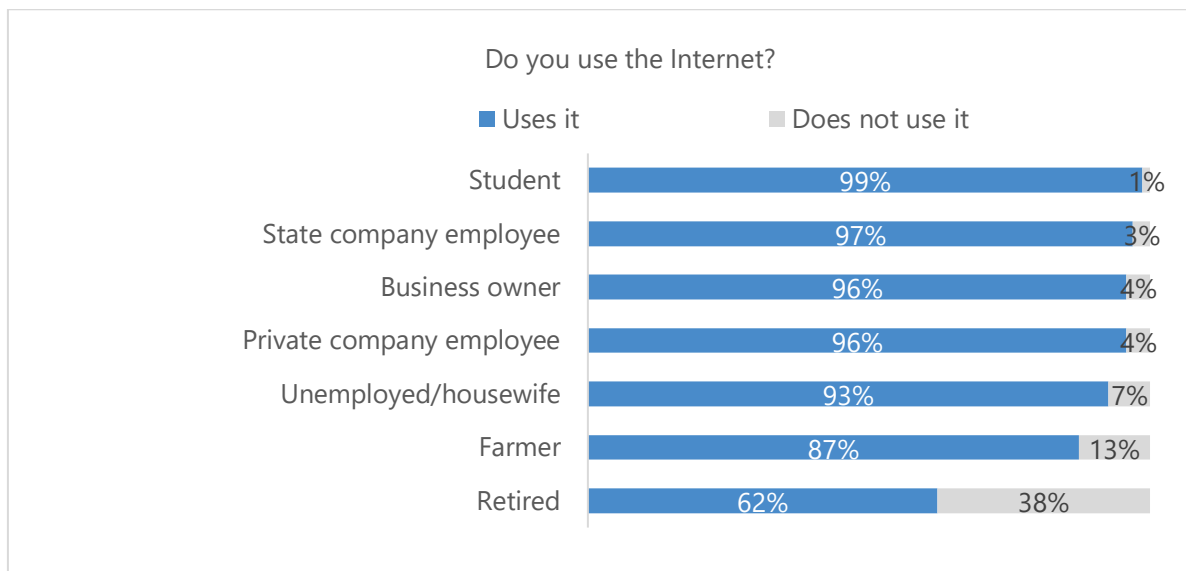
Chart 5.2. Internet users by age



Among the employed and students, the share of Internet users is highest. Even though the share of Internet users among the retired is lower compared to other population groups, the absolute share of Internet users in this category is still quite high.

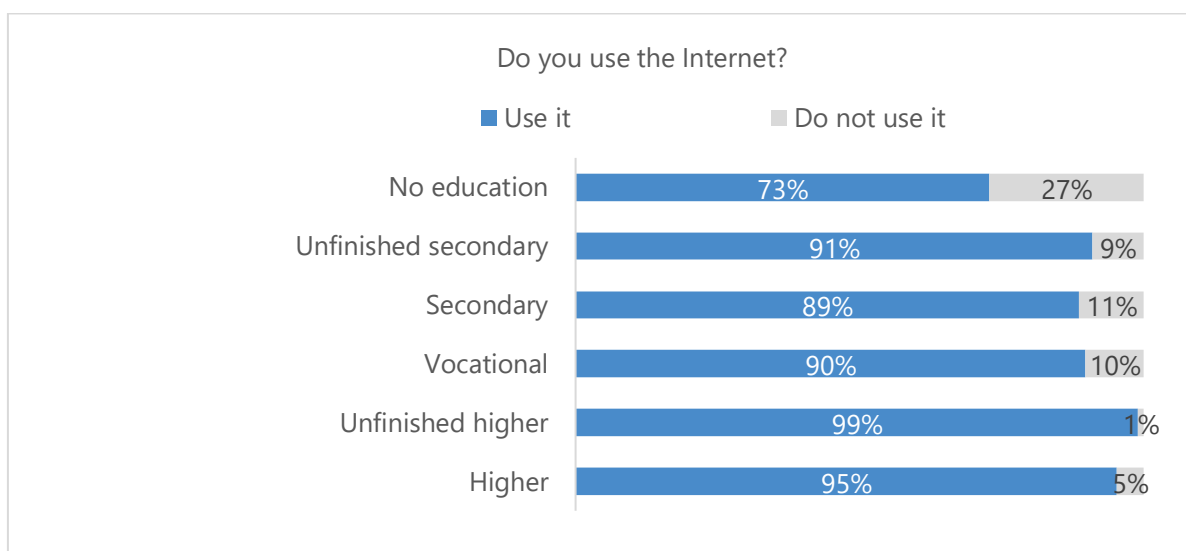
Chart 5.3. Internet users by employment type





However, the highest share of Internet users is observed among the population groups who are either receiving higher education right now or already have it.

*Chart 5.4. Internet users by education level*



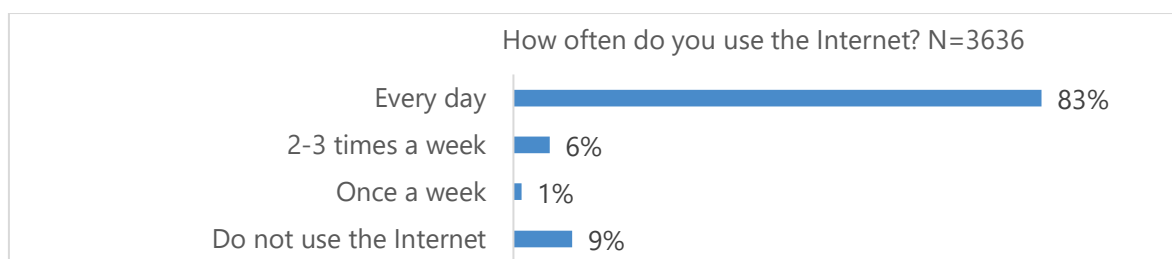
Please note that in 2023, the share of internet users in rural areas is almost the same (90%) as in urban areas (92%), although six years ago, in 2017, the share of internet users in villages was 52%, and in urban areas, 73%.

## 5.2. Practice of Internet usage

The population accesses the Internet regularly and using multiple devices: 90% of the population uses a smartphone to access the Internet, 6% of the population connects to the Internet via a PC, and 7%, via a laptop or a tablet. At the same time, as mentioned earlier, 9% of the population do not use the Internet.

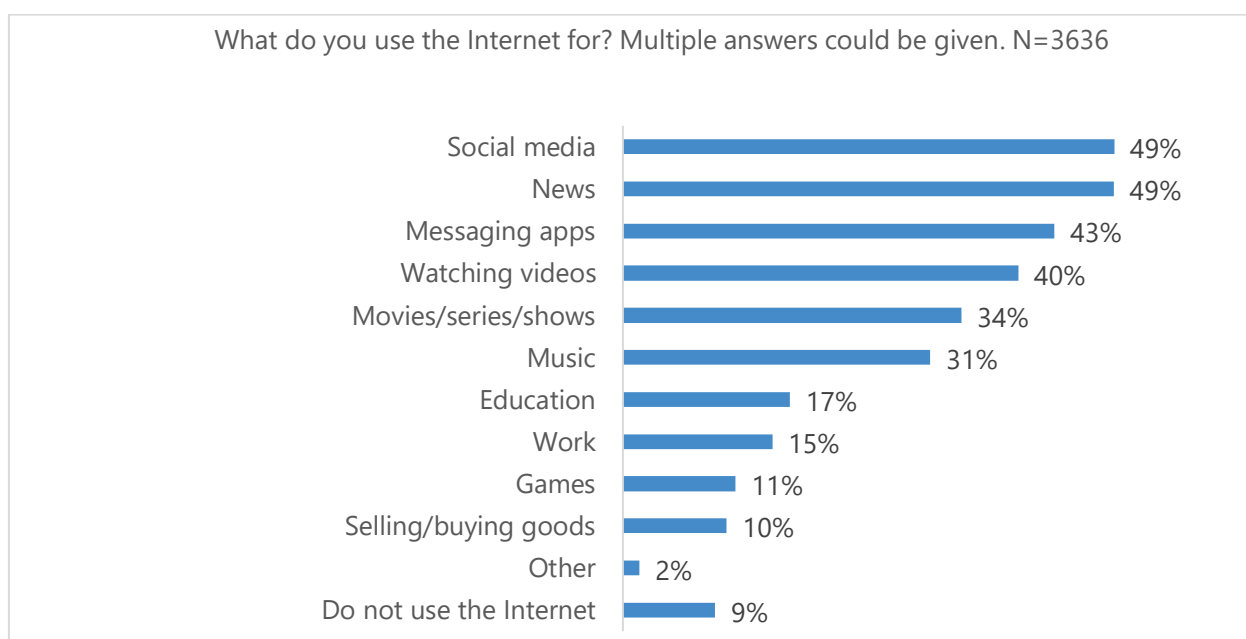
83% of the population of Kyrgyzstan aged 14+ use the Internet every day, 9% do not use it at all, the rest access the Internet from one to several times a week.

*Chart 5.5. Internet usage frequency*



Almost half of the population of the KR aged 14+ access the Internet to use social media and check the news. About 40% of the population use the Internet to use messaging apps and watch videos, and only 1 in 6 Kyrgyz dwellers uses the Internet for work and/or study.

*Chart 5.6. Purposes of Internet usage*



To access the Internet, residents of Kyrgyzstan aged 14+ in all regions of the country mainly use cellular carriers: O! (48%), Megacom (29%, and Beeline (21%). As for landline Internet, most of the operators present in the market cover only part of the regions, mainly the cities.

*Chart 5.1. Internet and cellular providers used for Internet access*

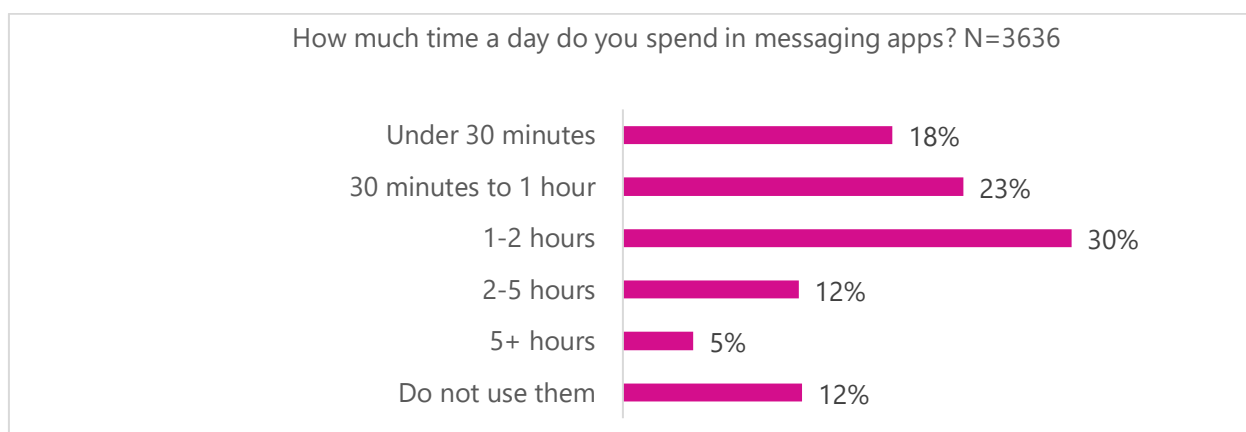
Region	O!	Megacom	Beeline	Megaline	Aknet	Home line	Saima telecom	Kyrgyz telecom	JET	Fast net	El kat
Bishkek, n=613	56%	32%	12%	8%	7%	4%	2%	1%	1%	1%	
Osh, n=174	32%	51%	21%	1%	5%	3%	1%	1%			2%
Chui region, n=546	57%	32%	9%		2%		3%	1%			
Talas region, n=146	73%	17%	10%				2%	3%	1%		
Issyk-Kul region, n=282	73%	13%	6%	1%		3%	4%	7%	2%		
Batken region, n=290	39%	21%	32%			2%	1%	2%	1%		
Jalal-Abad region, n=683	42%	26%	37%			1%	2%	2%	1%		1%
Osh region, n=741	25%	39%	30%		1%		1%				
Naryn region, n=161	83%	8%	4%		1%			3%			
Kyrgyzstan, n=3636	48%	29%	21%	2%	2%	1%	2%	2%	1%		

## 5.3. Practice of messaging apps usage

Messaging apps are used by 88% of Kyrgyz citizens aged 14+. 48% of Kyrgyz prefer to chat in messaging apps in Kyrgyz, 35%, in Russian, and 5%, in other languages.

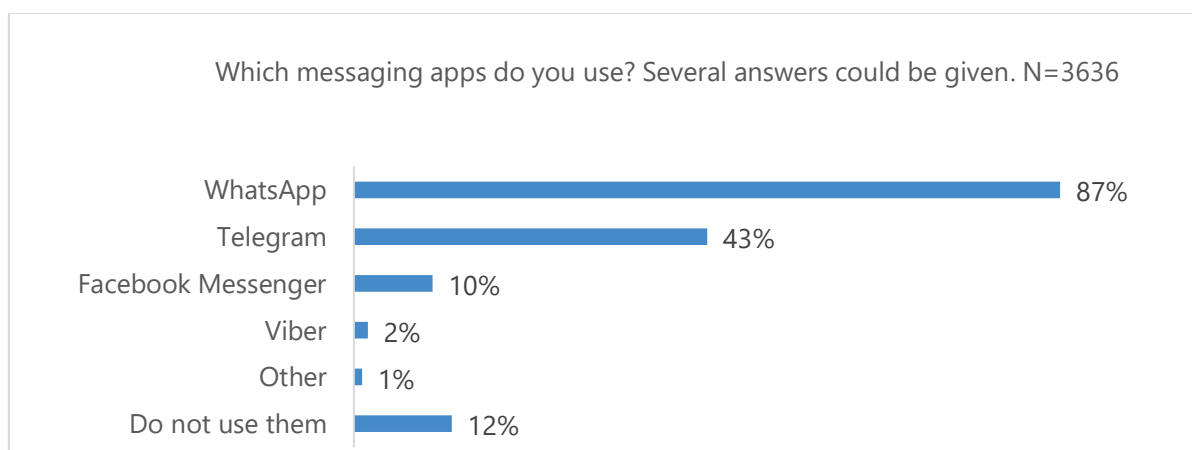
On average, more than half of the population of Kyrgyzstan (53%) spends 30 minutes to 2 hours a day in messaging apps.

*Chart 5.7. Time spent in messaging apps*



The most popular messaging app in Kyrgyzstan is WhatsApp; Telegram is in the second place by popularity.

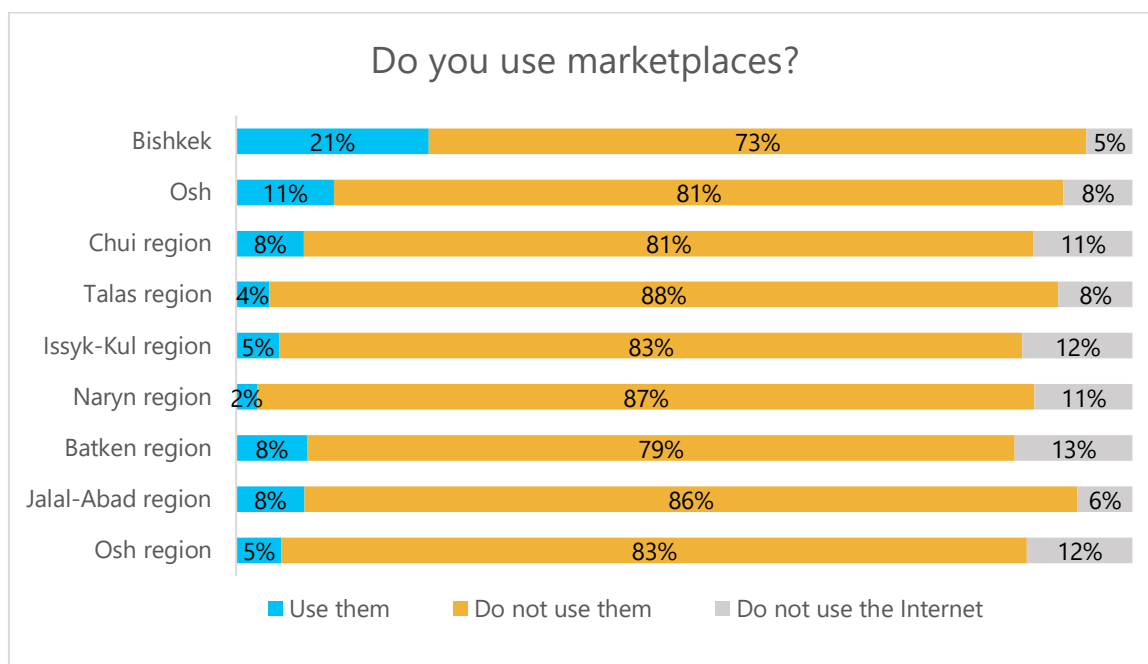
*Chart 5.8. Messaging app usage*



### 3.4. Practice of marketplace usage

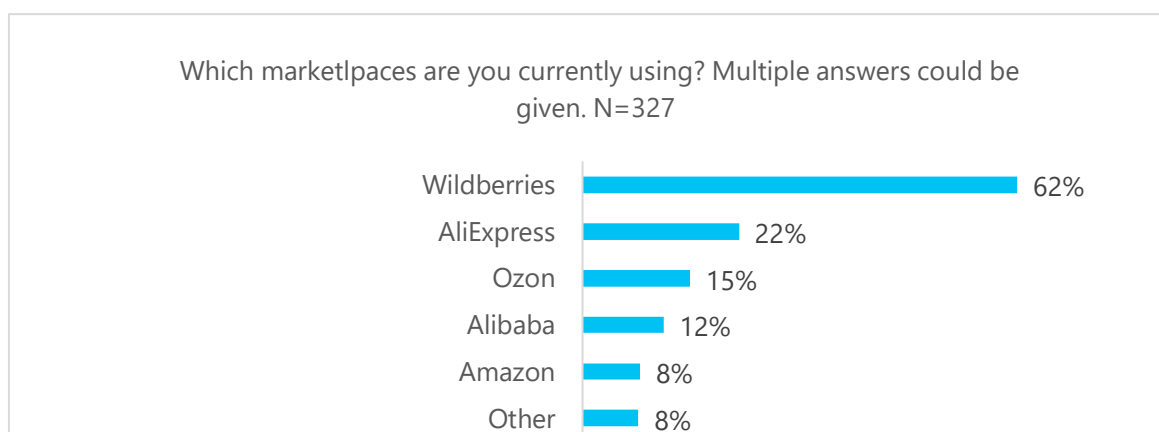
Marketplaces<sup>2</sup>, i.e. online platforms where sellers offer their goods or services, and buyers can choose and buy them, are used by 9% of Kyrgyzstan's residents aged 14+ (note: respondents were provided with a list of platforms and could add their own option if it was not on the list). Of all regions, Bishkek had the largest share of marketplace users from the total population, while Naryn region had the smallest share.

Chart 5.9. Marketplace usage by region



The most popular marketplace in Kyrgyzstan is Wildberries, used by 62% of all marketplace users. AliExpress is second, and Ozon third.

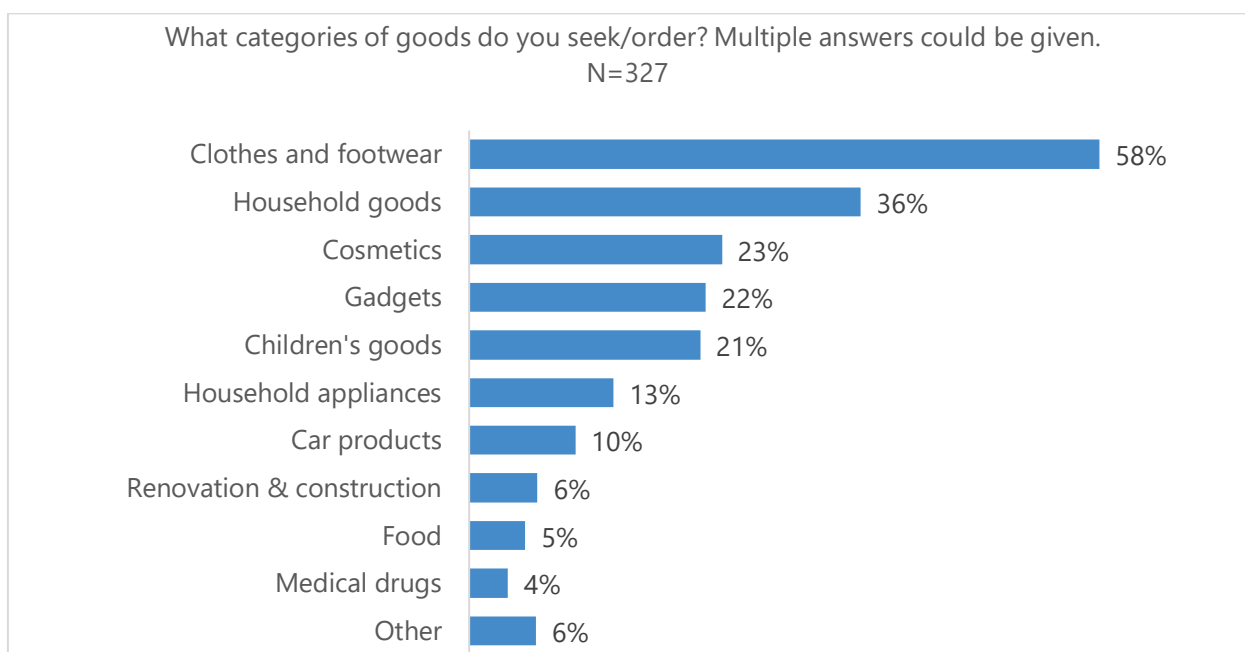
Chart 5.10. Marketplace usage by region, % of all users



Marketplace users mostly use them to order clothes and footwear, as well as household goods.

<sup>2</sup> Marketplace is an online platform where sellers offer their goods or services, buyers can choose from a variety of offers, and the platform guarantees the security of the deal (e.g. Amazon, Aliexpress).

*Chart 5.11. Categories of goods purchased at marketplaces*

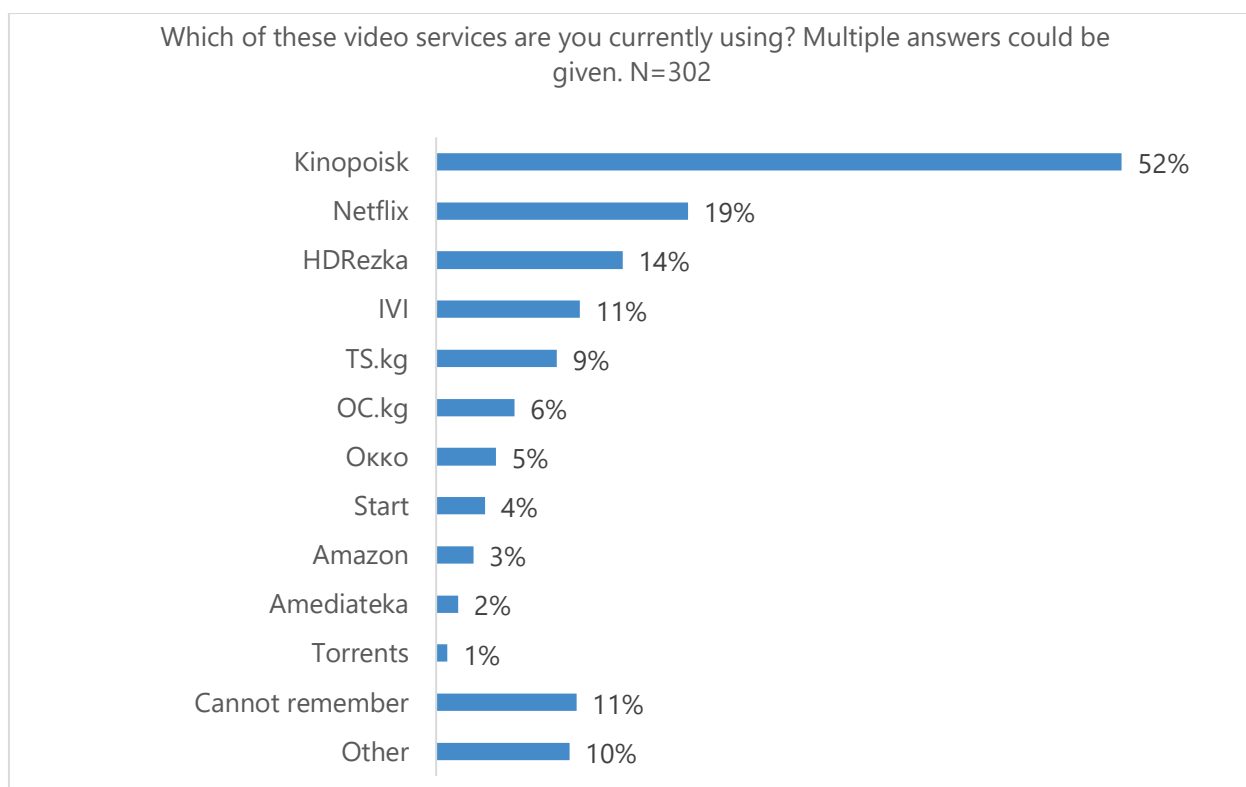


## 5.5. Practice of video service usage

Video services<sup>3</sup>, i.e. online platforms and websites that provide access to video content (except YouTube, which is described separately below), are used by 8% of Kyrgyz residents aged 14+ (note: respondents were provided with a list of platforms and could add their own option if it was not on the list).

The most popular video service is Kinopoisk, used by every second person who noted that they use paid or free video services. Netflix is used by every fifth user of video services.

Chart 5.12. Video service usage



Most users (72%) prefer to watch TV and series in video services in Russian, 21%, in Kyrgyz, and 7%, in other languages.

<sup>3</sup> Video service is an online platform offering access to video content, such as movies, series, short videos, or streams, i.e. Netflix or Kinopoisk.

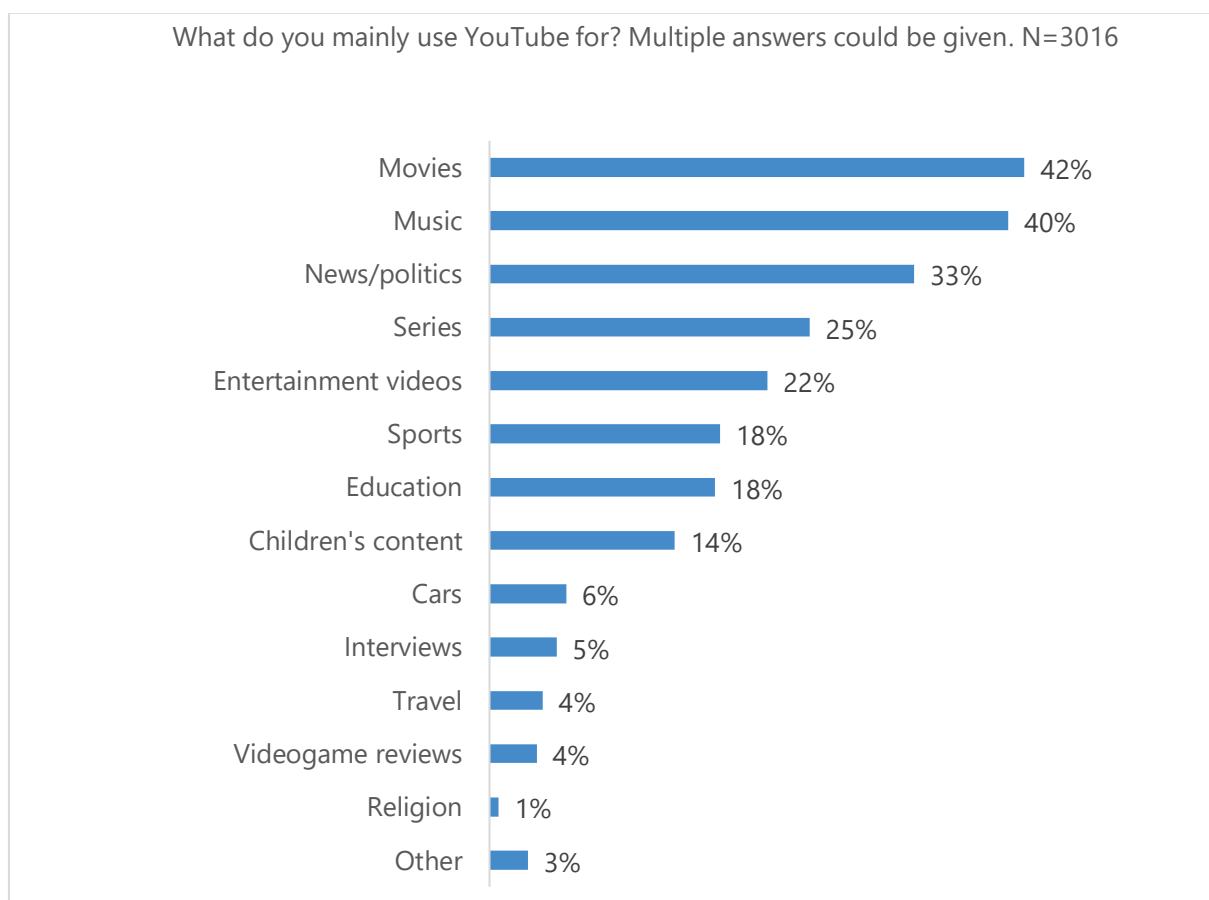
## 5.6. Practice of YouTube usage

*YouTube* is the most popular video service in Kyrgyzstan, used by 83% of the country's residents aged 14+.

48% of YouTube users prefer to watch content in Kyrgyz, 45% in Russian, 6% in Uzbek and 1% in English.

The majority of YouTube users use this platform to watch movies, listen to music, and follow news/politics.

*Chart 5.13. Purposes of using YouTube*





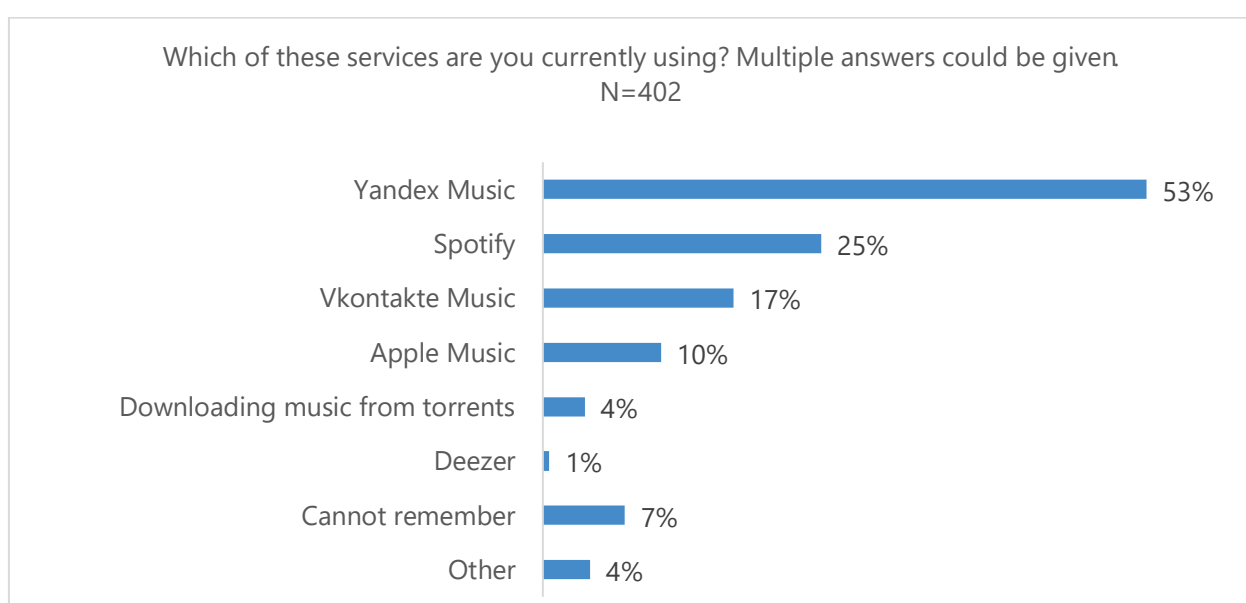
### 3.7. Practice of audio service usage

Audio services<sup>4</sup>, i.e. online platforms and sites that provide access to audio content, are used by 11% of Kyrgyzstan residents aged 14+.

Music services (the survey concerned music content only) are most popular in the cities of Bishkek (19%) and Osh (16%). As for age strata, the share of users of audio services is highest in the groups 14-to-17 (28%) and 18-to-24 (18%). In other age categories, the share of users of music services does not exceed 11%.

Among users of audio services (n=402), the majority use Yandex Music, one in four uses Spotify, and one in six uses VKontakte Music.

Chart 5.14. Audio service usage



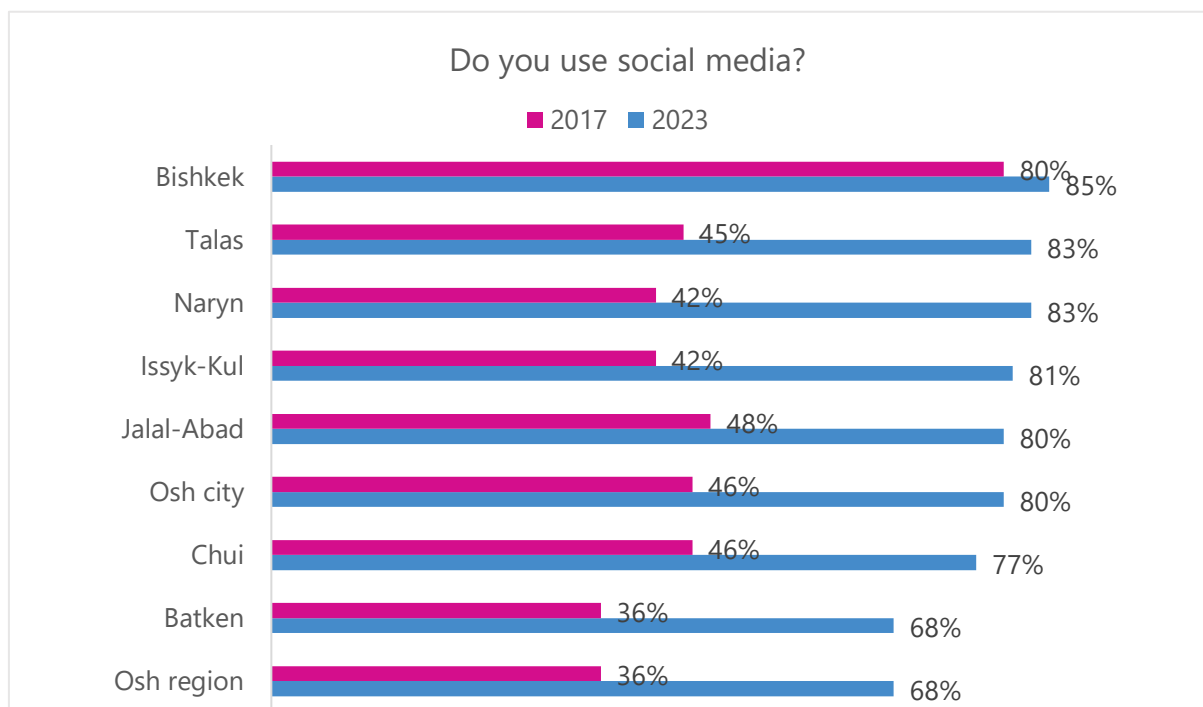
<sup>4</sup> An audio service is an online platform providing access to audio content, such as music, podcasts or audiobooks, i.e. Spotify or Apple Music

## 6. SOCIAL MEDIA

### 6.1. Social media user profile

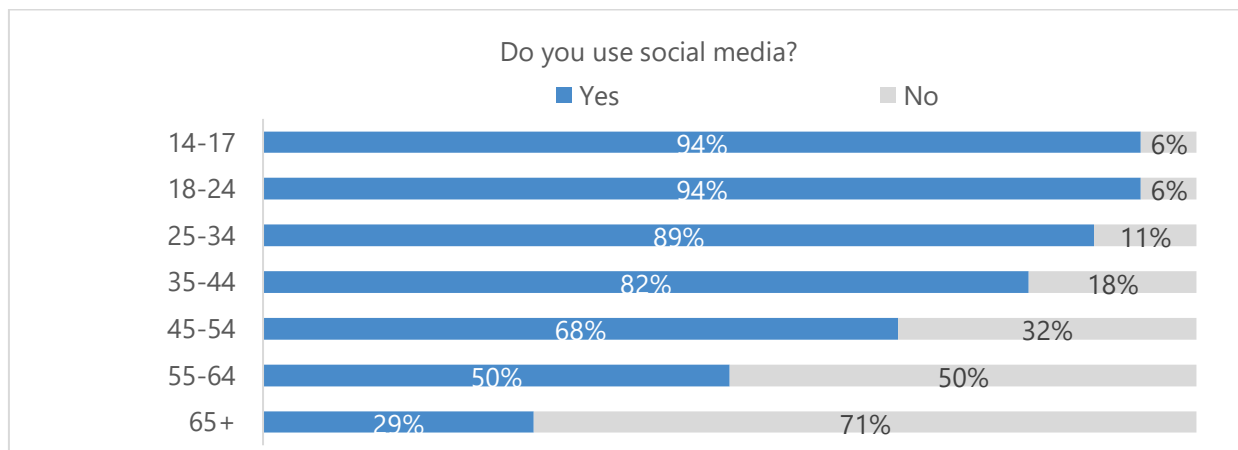
According to the 2023 survey, 77% of KR residents aged 14+ use social media, which is almost 2 times more (31 p.p. more) than in 2017. The share of social networks users is the highest in Bishkek, as well as Talas and Naryn regions.

Chart 6.1. Social media usage by region



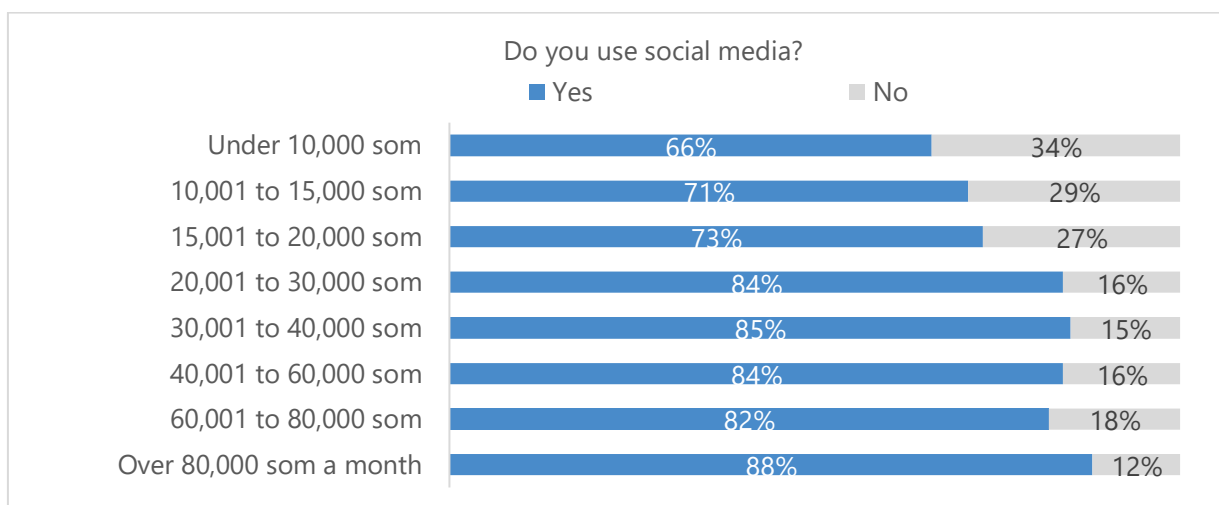
The share of social network users is 80% among women and 74% among men. There is a trend in the share of social networks users by age: the higher the age category, the lower the share of social network users. At the same time, among the retired, the share of users is 36%, while for other types employment it indicator is 69% or higher.

Chart 6.2. Social media usage by age



There is also an upward trend in the share of social network users in higher income groups. Among other reasons, this is due to the fact that many people use social networks for work and business development.

*Chart 6.3. Social media usage by income*

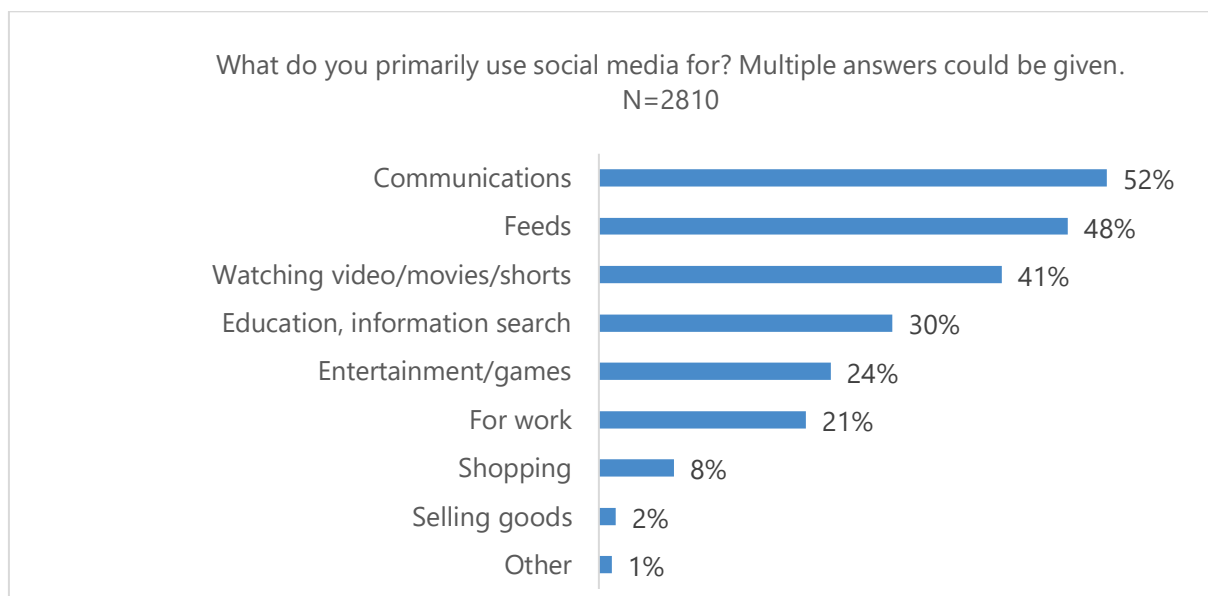


As for education level, the share of users among current students and those with higher education is 5%+ higher than among other strata of the population.

## 6.2. Social media usage

Most social media users use social media to communicate; many also utilize social media to browse news feeds and/or view entertainment content (clips, videos, movies, etc.). Interestingly, 30% of users use social media for education or information search.

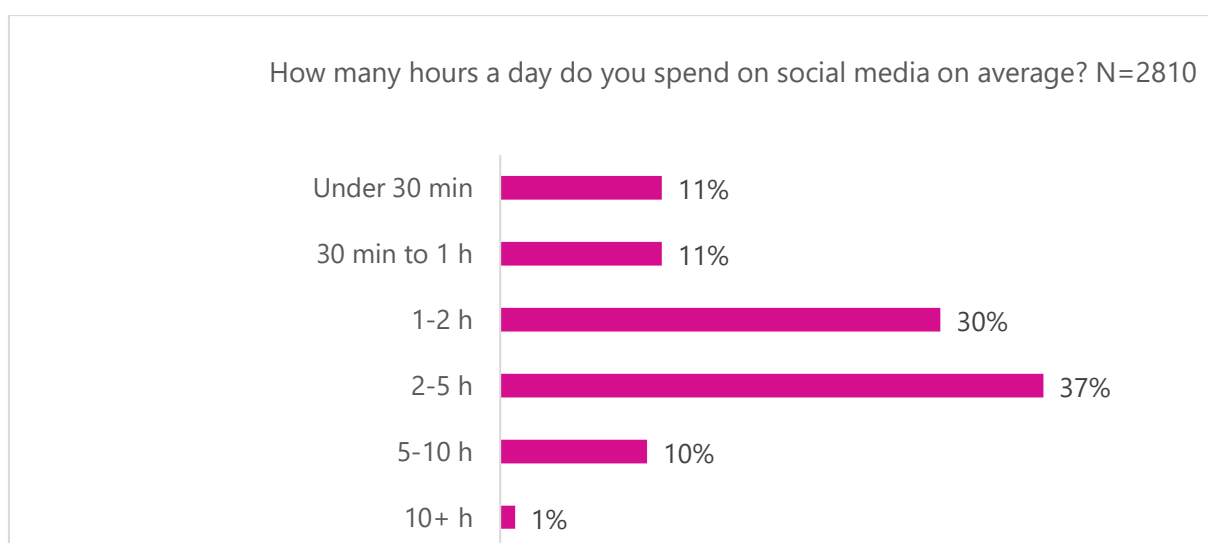
*Chart 6.4. Social media usage goals*



The majority prefer to use social media in Kyrgyz (52%); Russian is also preferred by a significant part of users (44%). The remaining 4% of users prefer Uzbek (3%) or English (1%) as their social media language.

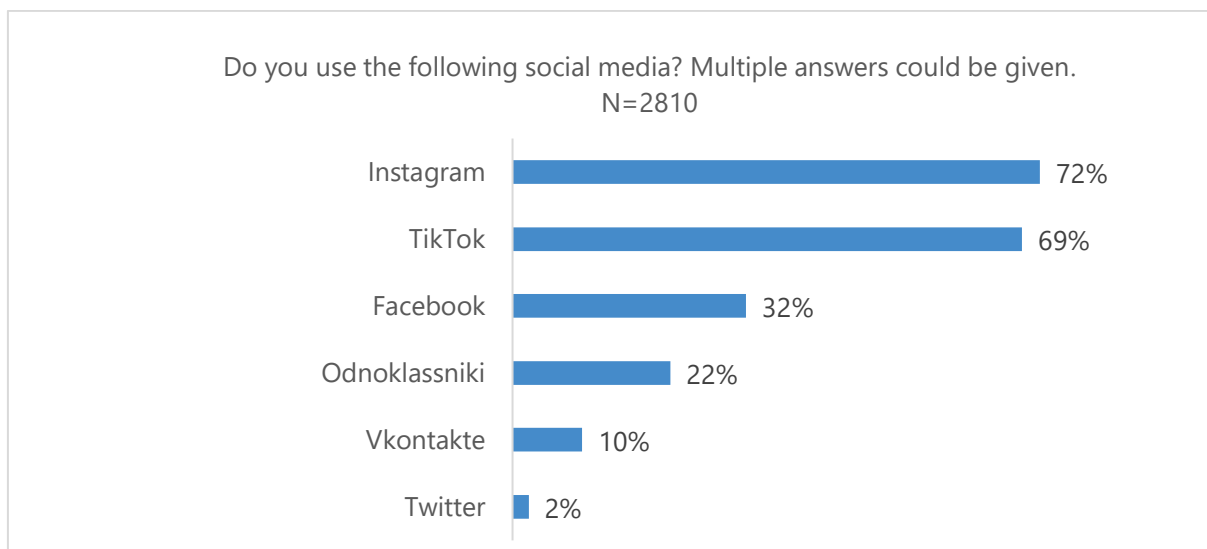
67% of the population spend 1-5 hours a day in social networks.

*Chart 6.5. Average time spent on social media*



Instagram and TikTok are the most popular among social media users. The share of Instagram users is highest in Bishkek (69%) and Talas region (68%), while the share of TikTok users is higher in Chui (60%), Jalal-Abad (59%), Talas (58%) and Issyk-Kul (57%) regions.

Chart 6.6. Social media usage



The share of Instagram users is highest in the age group 18-to-24, and TikTok, in the group 14-to-17. It is also worth noting that the share of Instagram users among women is higher (60%) than among men (51%).

Facebook is >2 times more popular among social media users with higher education (43%) than among users with secondary education (19%). A similar trend is observed with Instagram, where the share of users with higher education is 70%, and with secondary education, 49%. With TikTok, the situation is the opposite: the share of people with secondary education among its users is 55%, and of those with higher education, 43%.

## APPENDIX 1. TV MEDIA INDICATORS BY REGION

### Average daily ratings (ADR), Top 30

Chart 1. ADR, Bishkek. Data as % of Bishkek dwellers

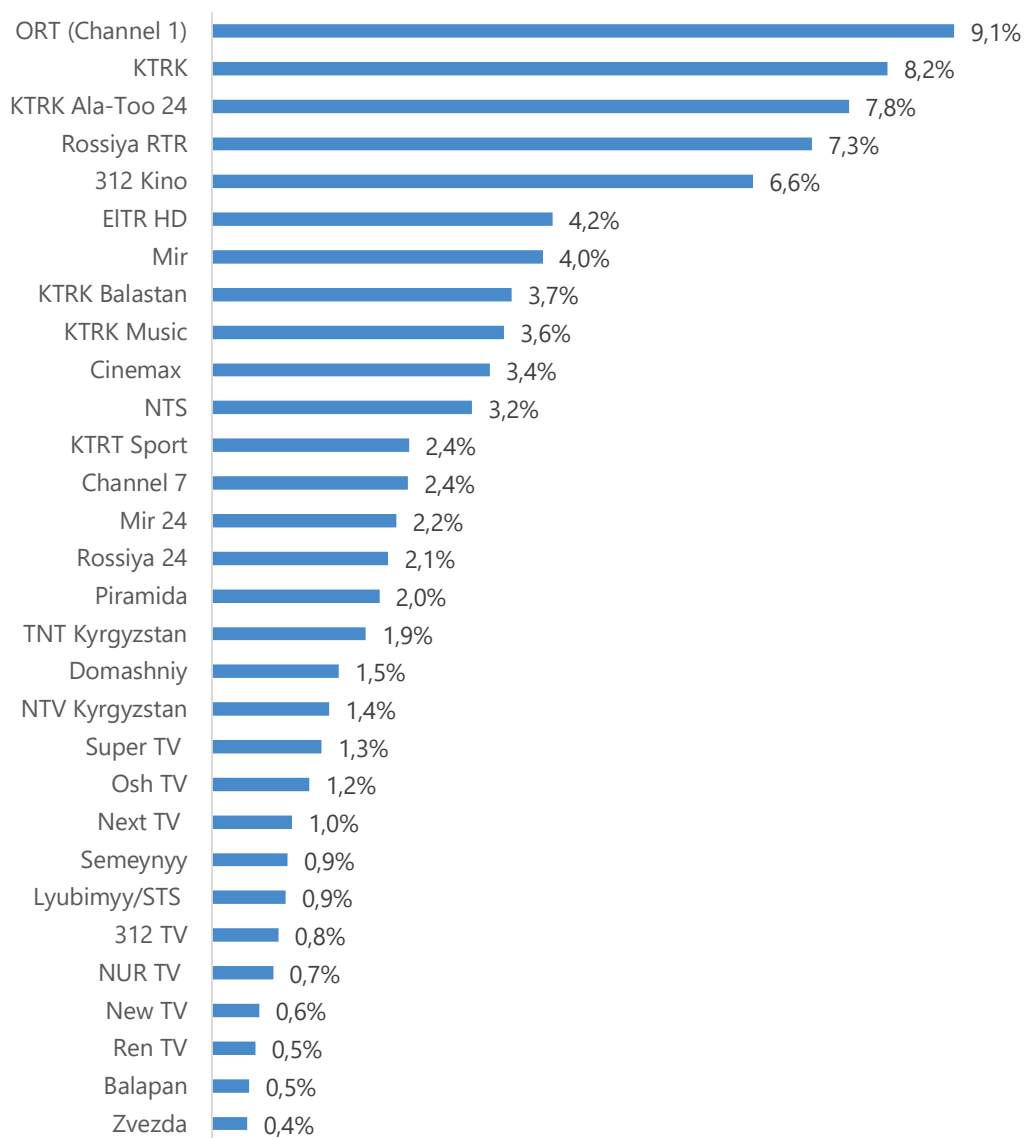


Chart 2 ADR, Osh. Data as % of Osh dwellers

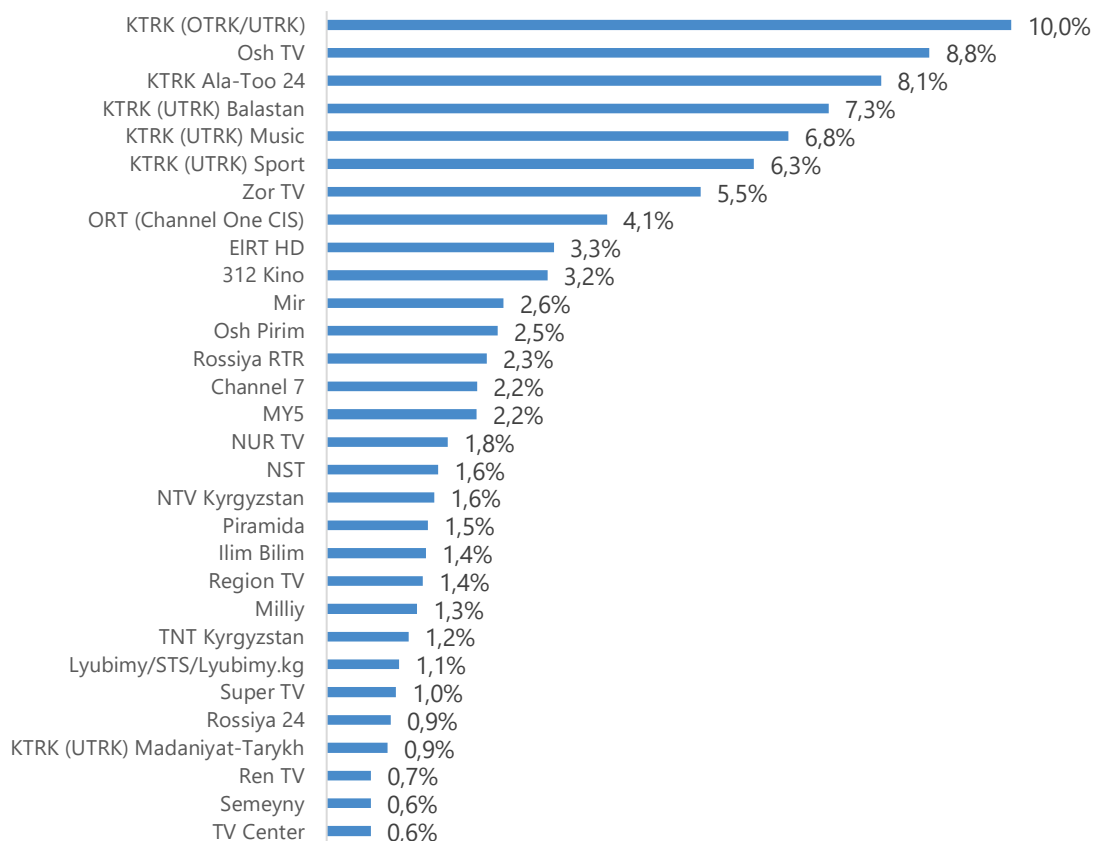


Chart 3. ADR, Chui region. Data as % of Chui region dwellers

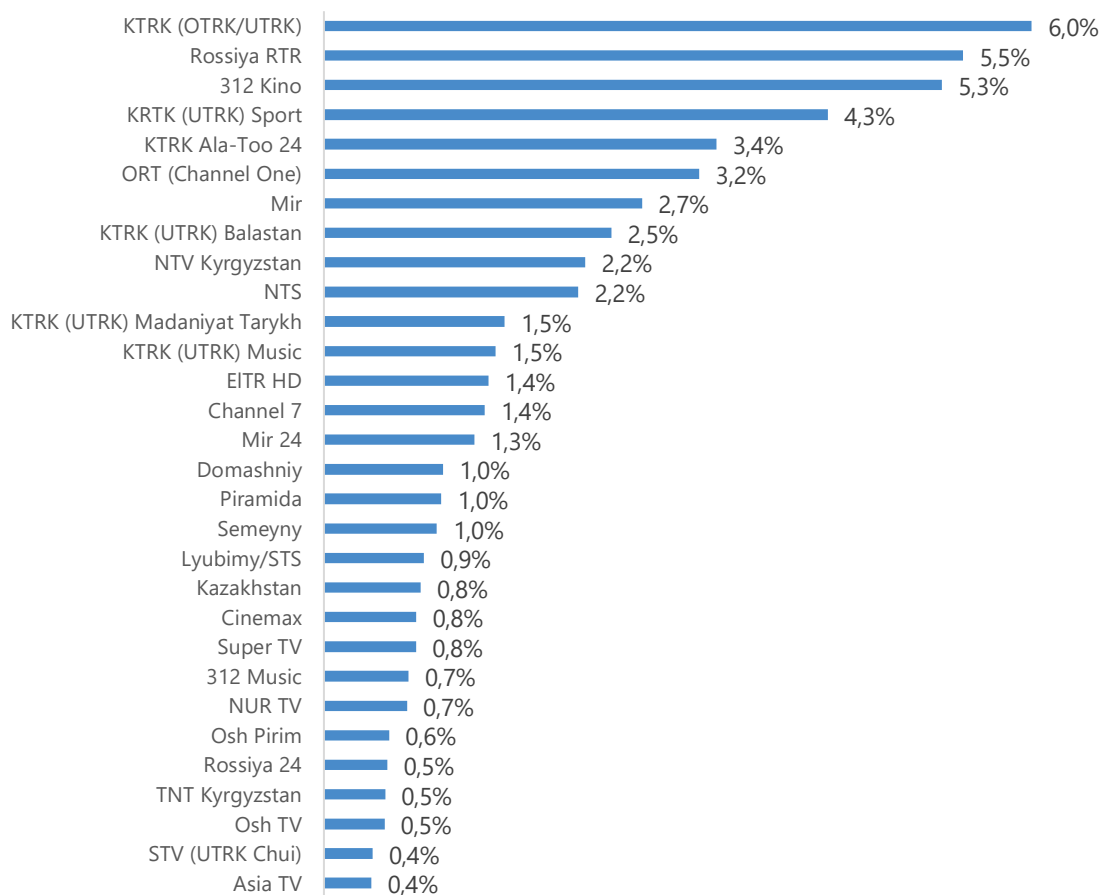


Chart 4. ADR, Talas region. Data as % of Talas region dwellers

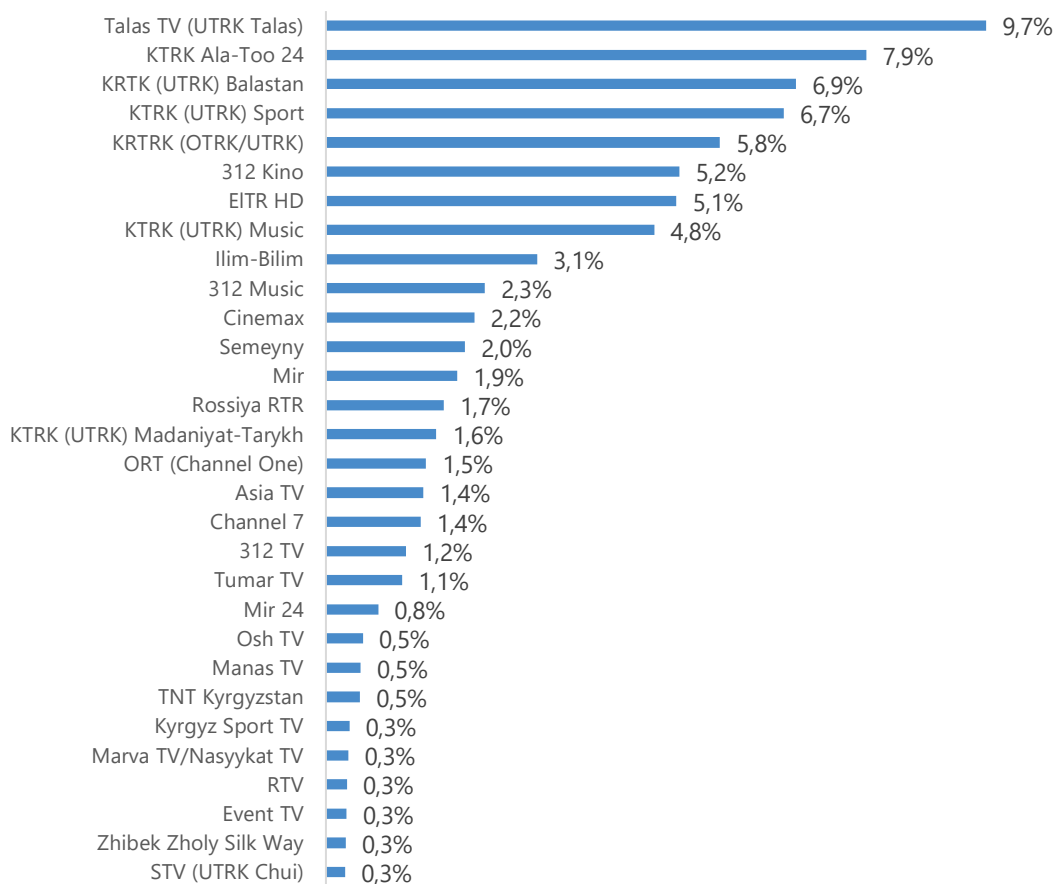


Chart 5. ADR, Issyk-Kul region. Data as % of Issyk-Kul region dwellers

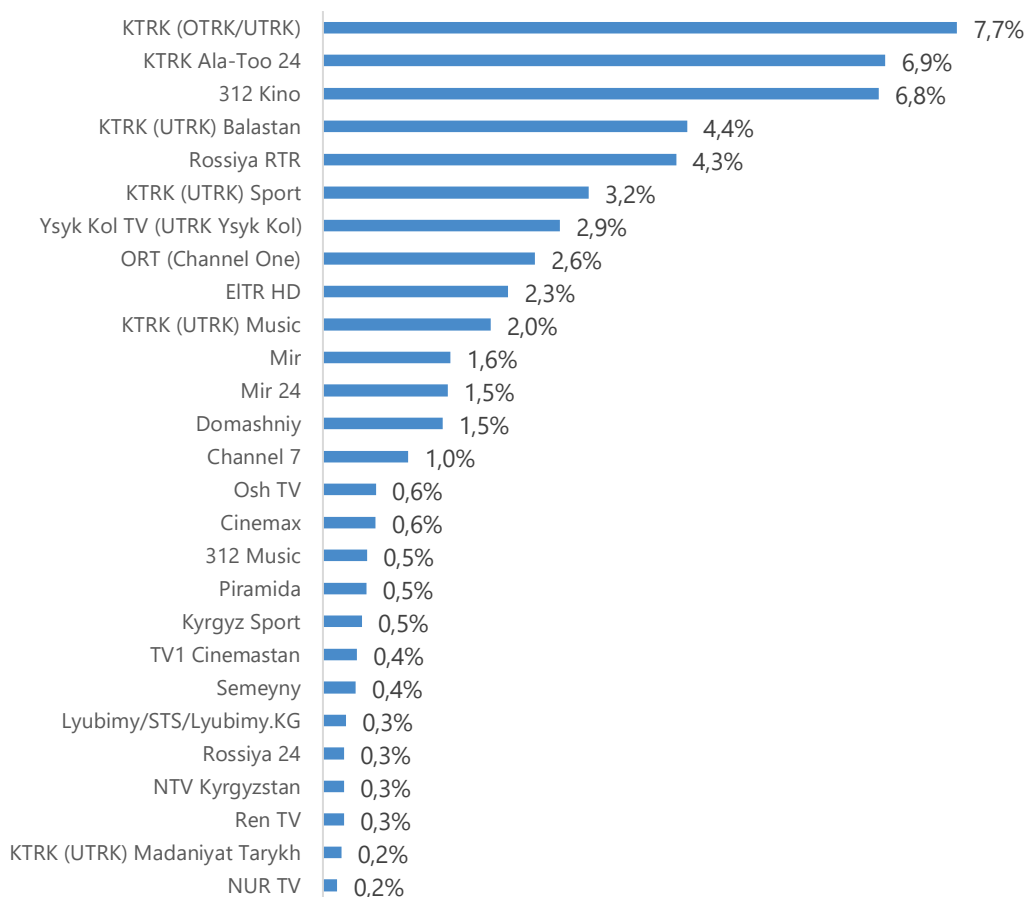




Chart 6. ADR, Naryn region. Data as % of Naryn region dwellers

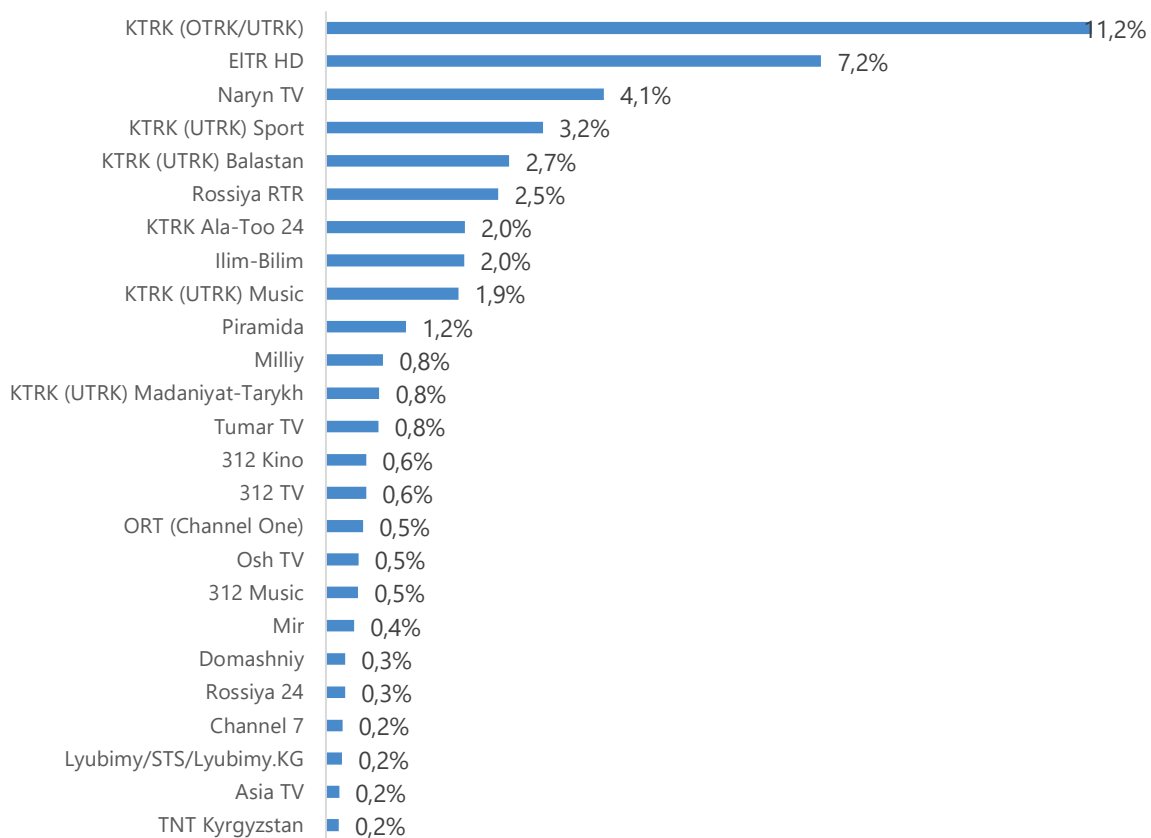


Chart 7. ADR, Jalal Abad region. Data as % of Jalal Abad region dwellers

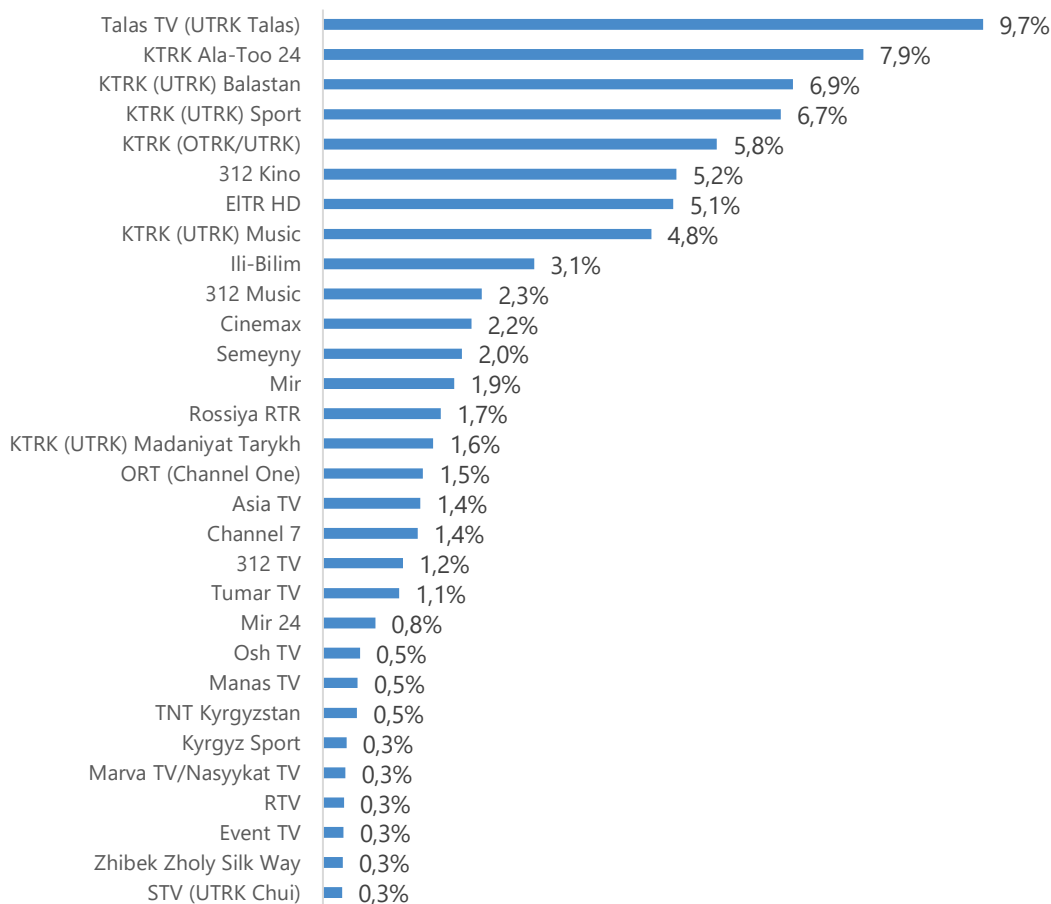


Chart 8. ADR, Osh region. Data as % of Osh region dwellers

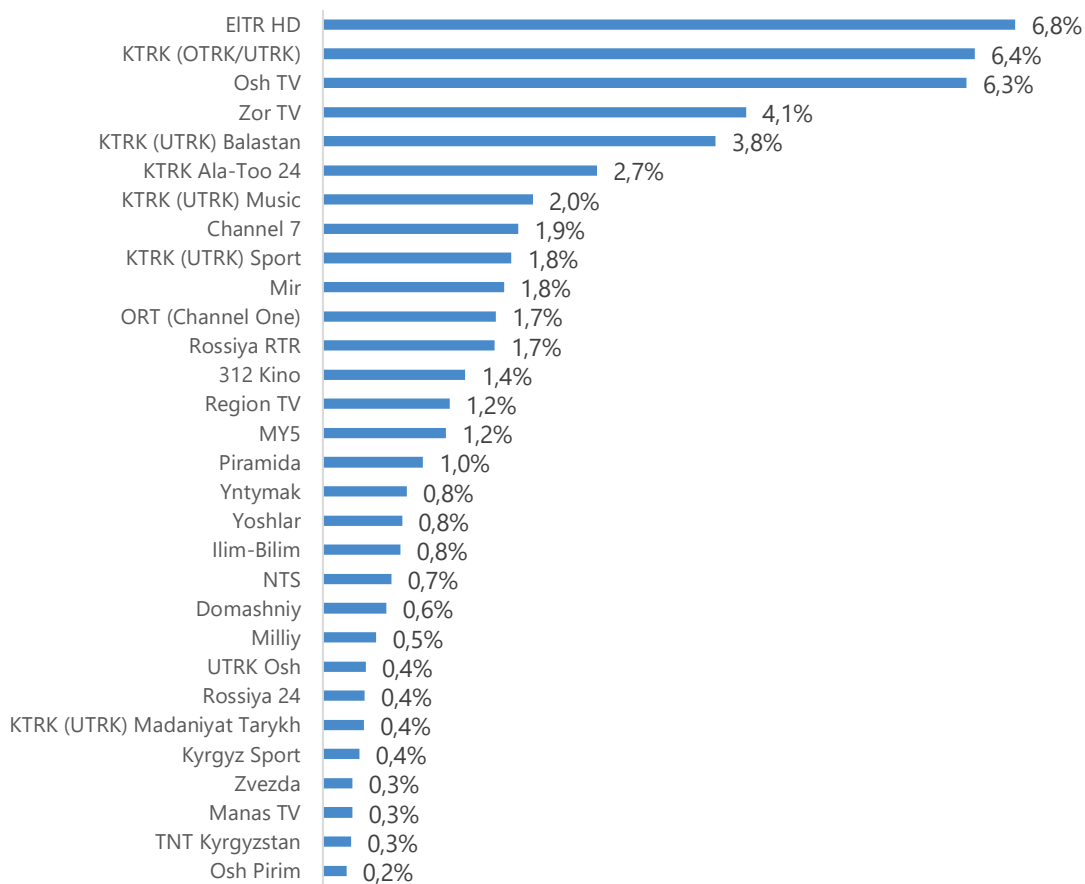
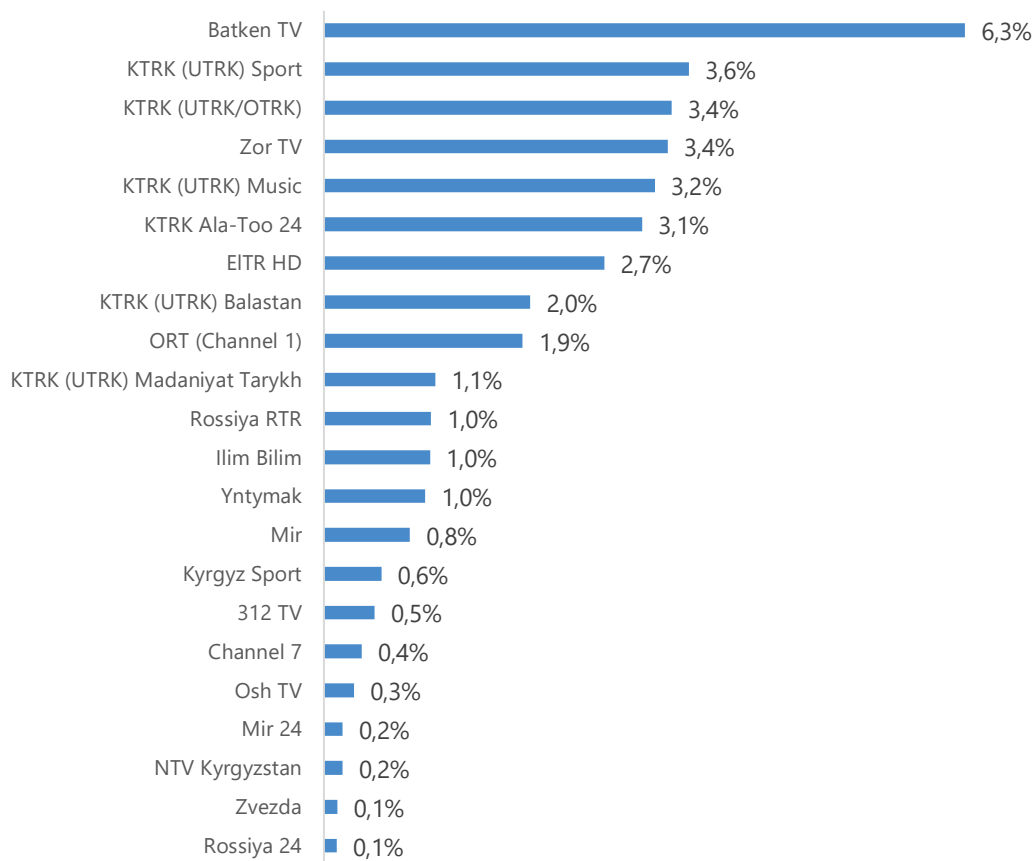


Chart 9. ADR, Batken region. Data as % of Batken region dwellers



## Average weekly ratings (AWR), Top 30

Chart 10. AWR, Bishkek. Data as % of Bishkek dwellers

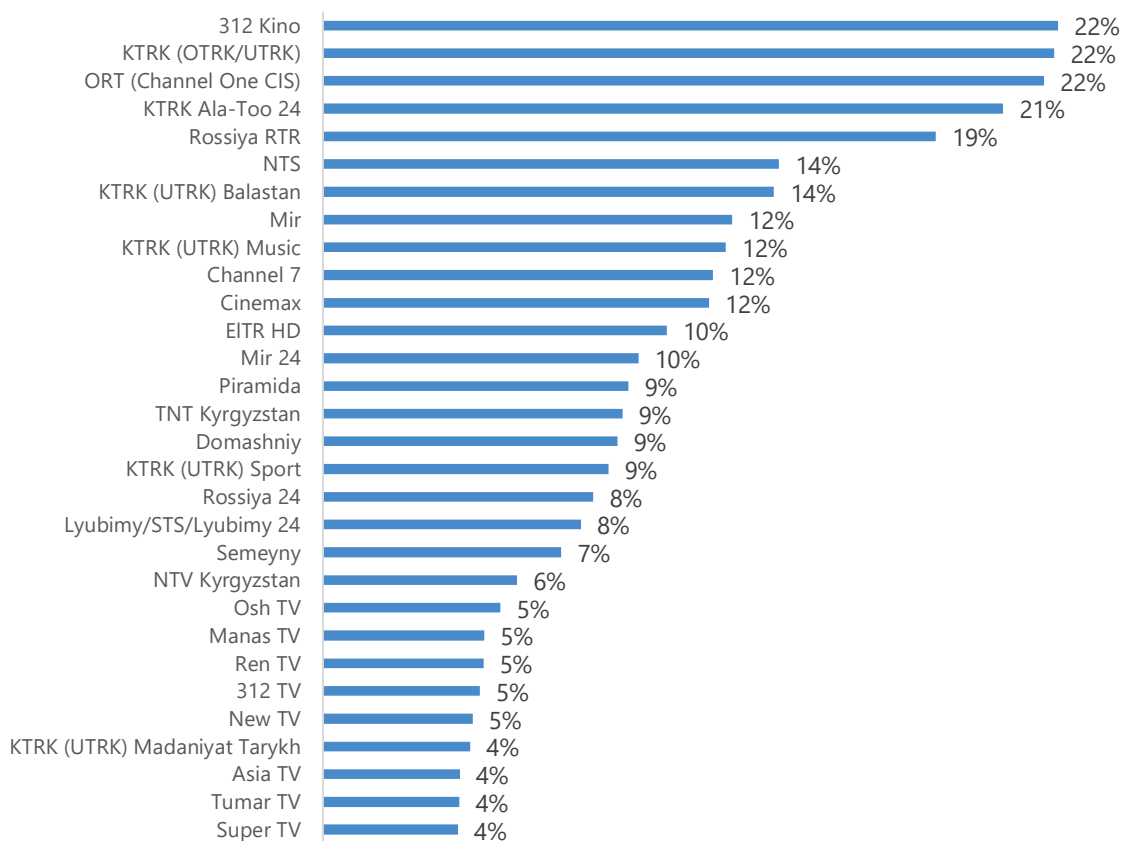


Chart 11. AWR, Chui region. Data as % of Chui region dwellers

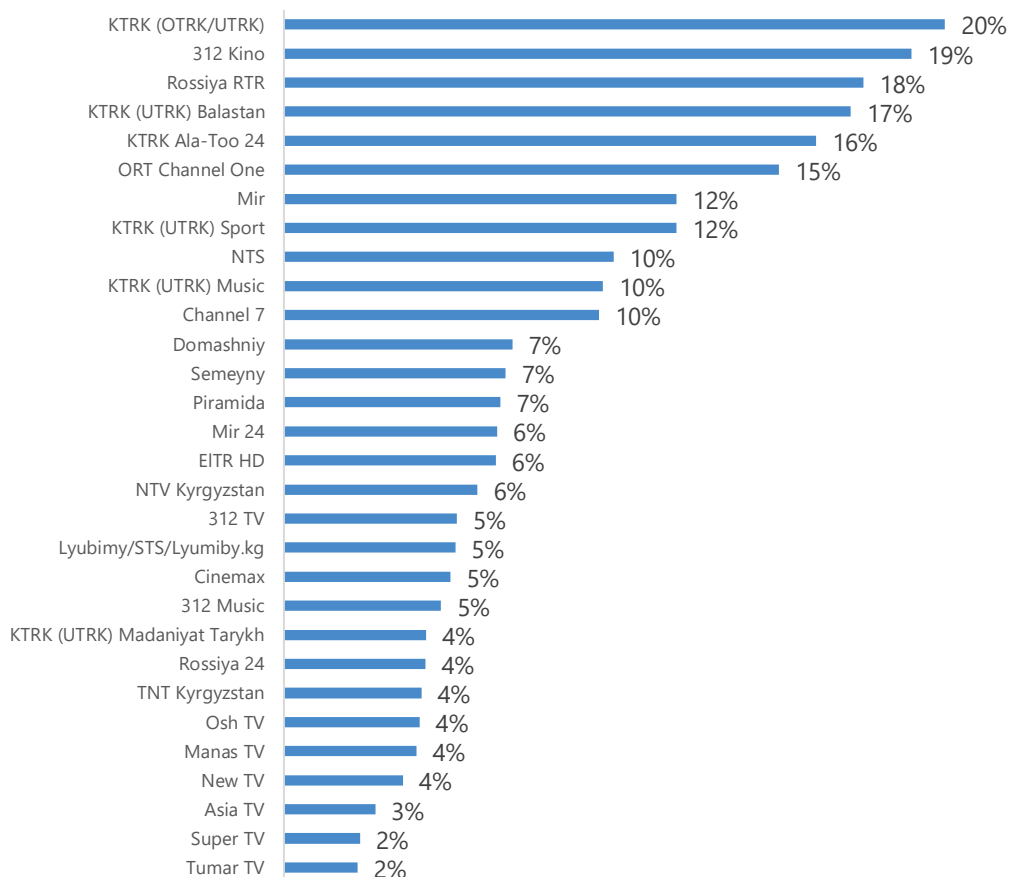


Chart 12. AWR, Talas region Data as % of Talas region dwellers

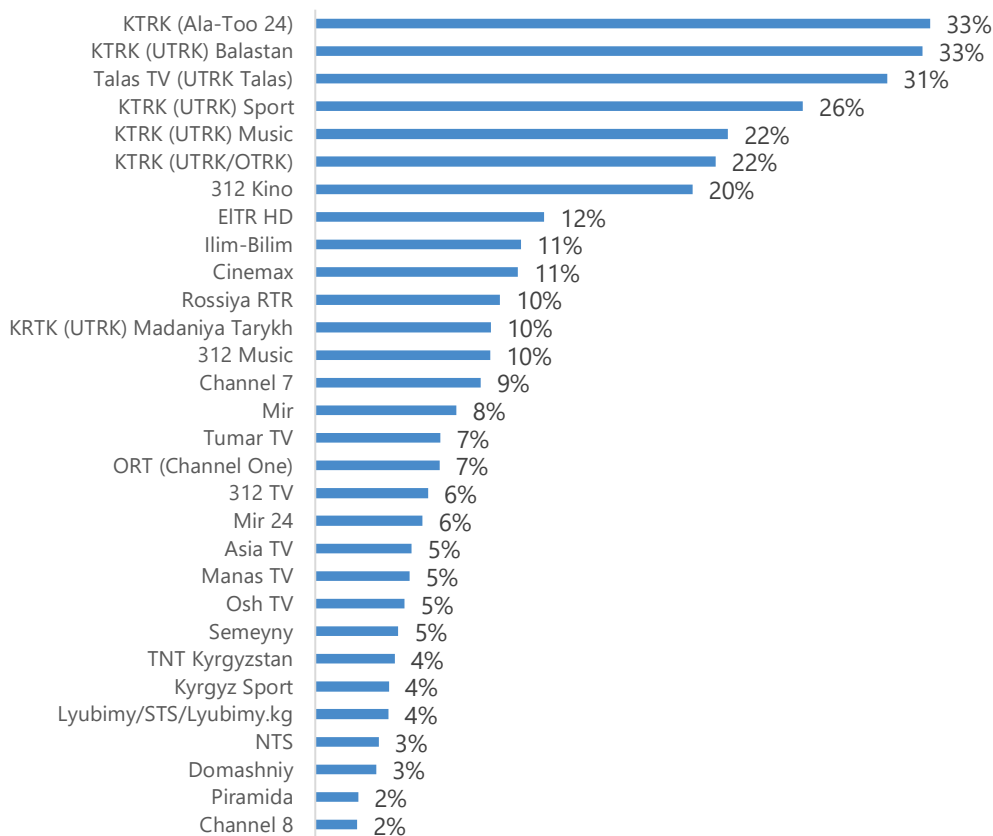


Chart 13. AWR, Issyk-Kul region. Data as % of Issyk-Kul region dwellers

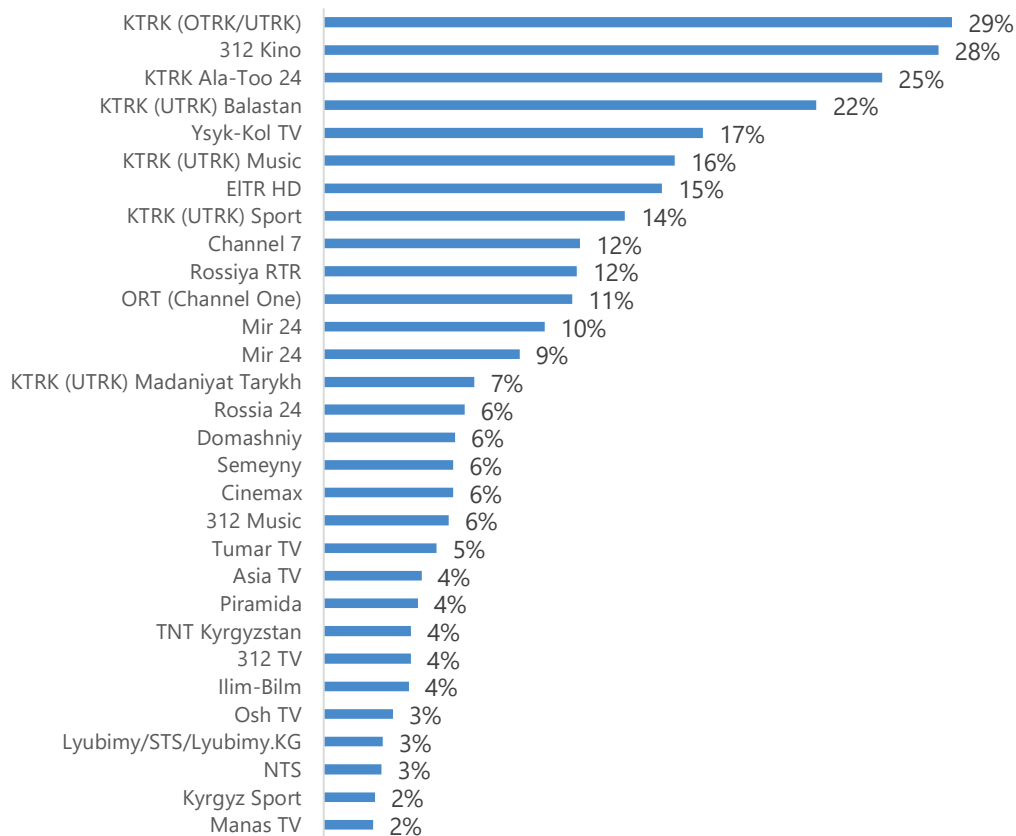


Chart 14. AWR, Naryn region. Data as % of Naryn region dwellers

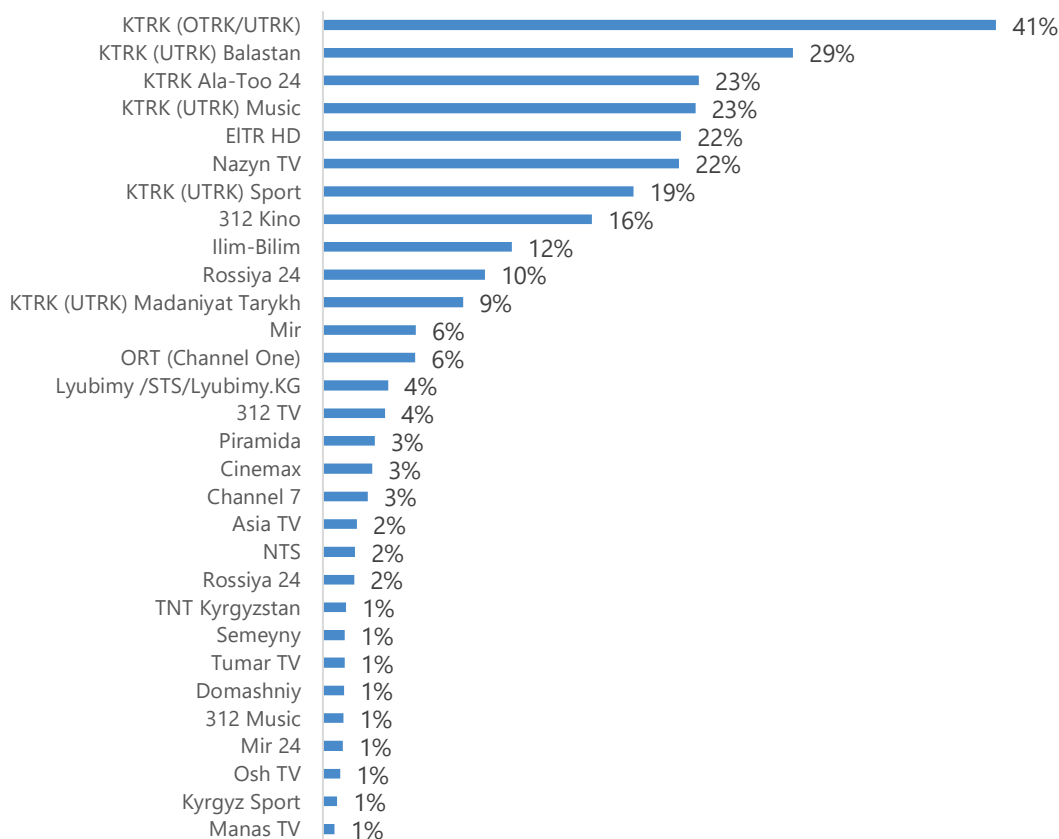


Chart 15. AWR, Batken region. Data as % of Batken region dwellers

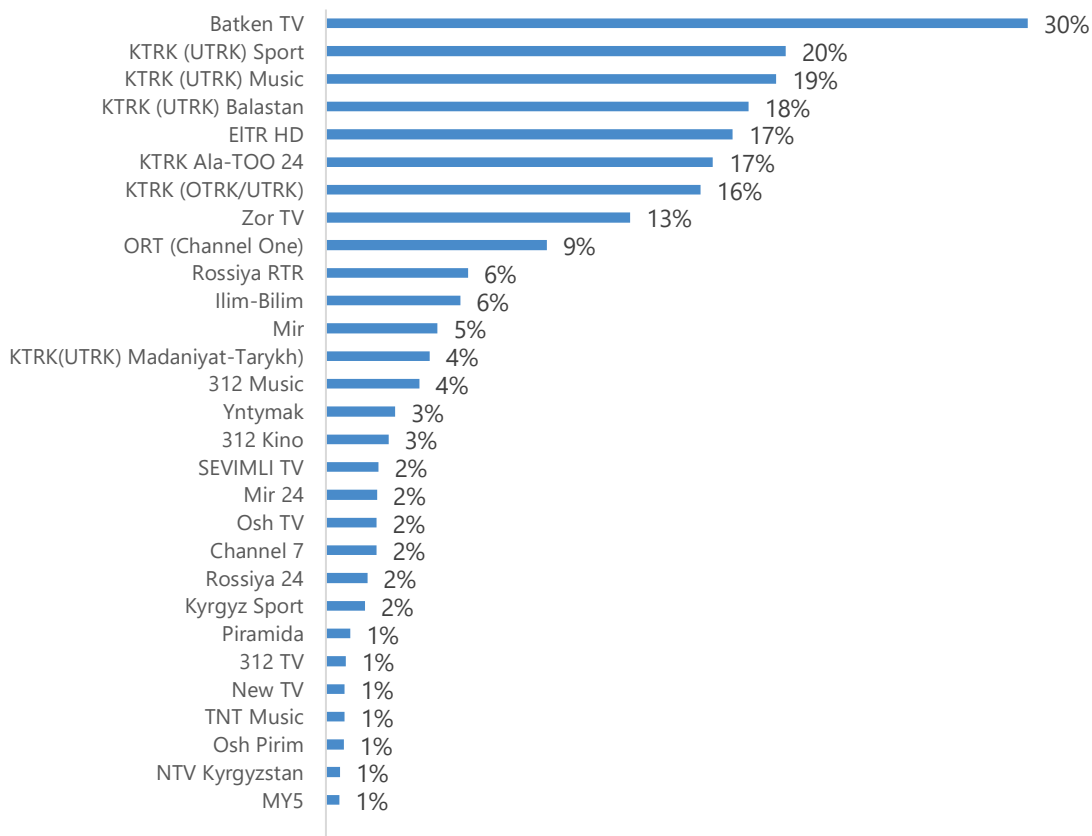


Chart 16. AWR, Jalal Abad region,. Data as % of Jalal Abad region dwellers

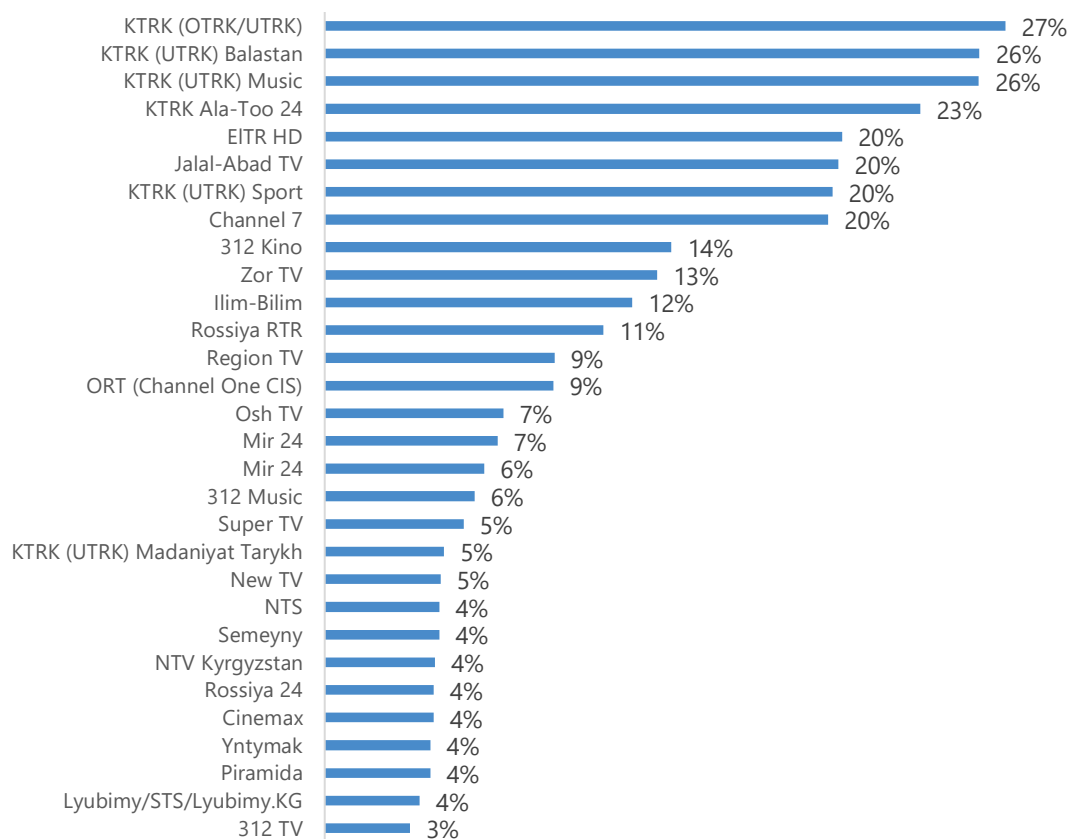


Chart 17. AWR, Osh region. Data as % of Osh region dwellers

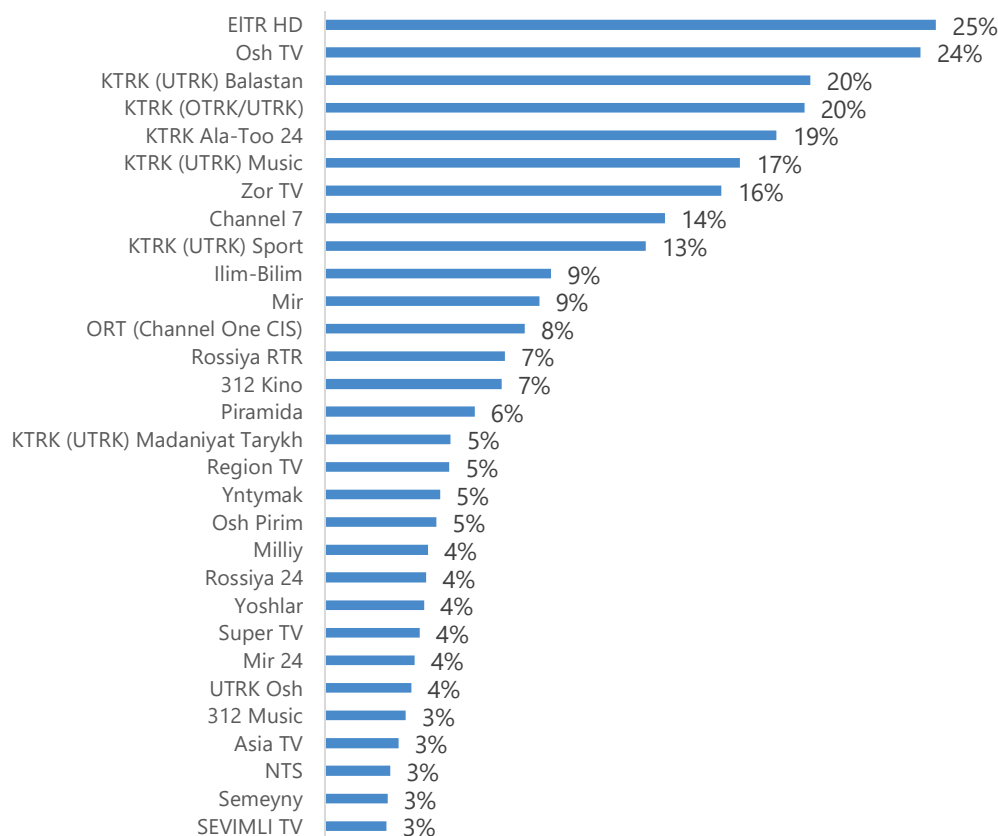
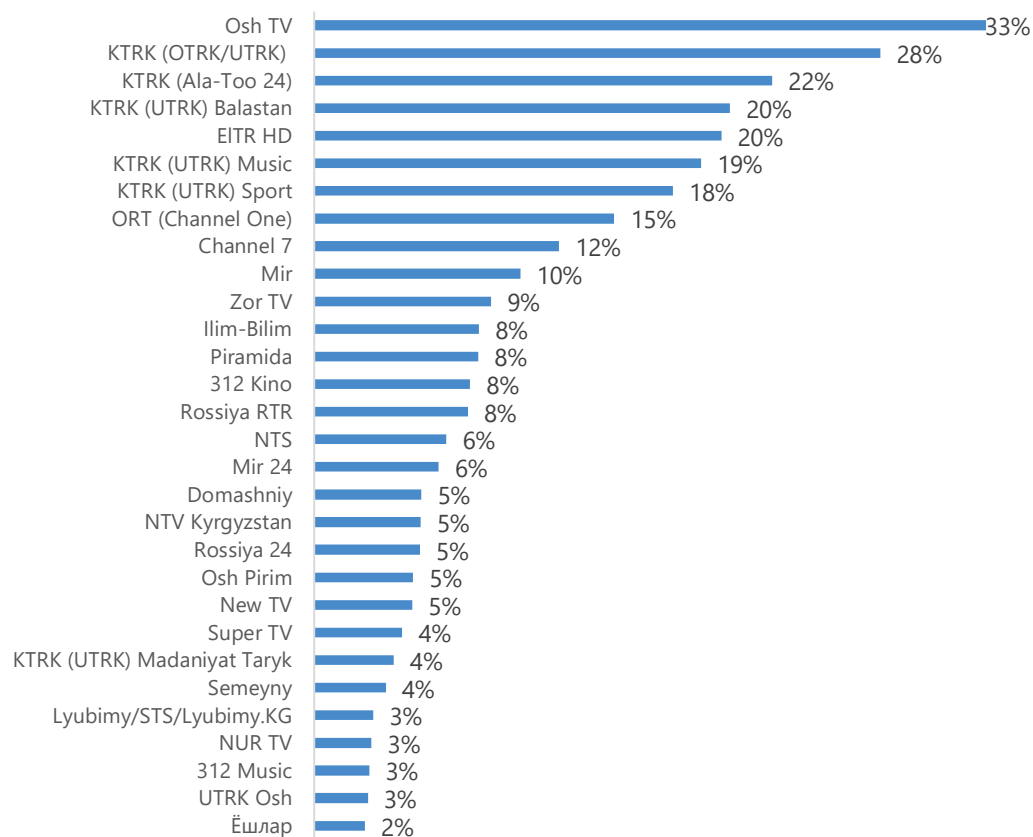


Chart 18. AWR, Osh city. Data as % of Osh dwellers





## Share

Table 1. Share , TV, by region, % of overall viewing

TV channel	Bishkek	Osh city	Chuy	Talas	Naryn	Issyk-Kul	Djalal-Abad	Osh	Batken
KTRK (OTRK / UTRK)	8,2%	10,4%	7,9%	4,8%	25,1%	14,5%	7,7%	7,0%	2,8%
Rossiya RTR	11,1%	2,6%	15,2%	2,1%	4,1%	9,9%	6,0%	3,3%	1,9%
KTRK (UTRK) Balastan	4,5%	7,9%	4,0%	5,9%	5,7%	6,1%	9,3%	10,0%	14,1%
EITR HD	4,4%	1,3%	1,8%	5,8%	19,5%	6,0%	8,5%	11,5%	6,3%
KTRK Ala-Too 24	5,6%	9,1%	10,8%	8,7%	2,5%	7,4%	7,0%	3,1%	8,2%
ORT (Channel One CIS)	10,6%	6,7%	5,3%	1,9%	1,3%	6,3%	2,6%	4,1%	2,3%
312 Kino	6,2%	3,9%	5,0%	5,0%	2,2%	11,8%	6,4%	2,4%	0,0%
KTRK (UTRK) Sport	1,9%	5,1%	7,8%	9,5%	8,1%	10,4%	5,3%	3,6%	6,4%
KTRK (UTRK) Music	1,6%	7,7%	3,1%	2,7%	5,1%	2,6%	6,5%	5,1%	2,6%
Mir	6,2%	2,3%	4,1%	0,7%	0,9%	3,0%	1,5%	4,7%	1,7%
Zor TV	0,0%	4,2%	0,0%	0,0%	0,0%	0,0%	3,2%	8,6%	10,6%
Osh TV	0,9%	9,2%	0,7%	0,1%	2,6%	0,3%	1,2%	9,2%	1,1%
Channel 7	1,3%	2,4%	1,6%	0,5%	0,0%	1,9%	3,6%	2,8%	0,3%
NTS	3,8%	0,8%	2,6%	0,1%	0,0%	0,0%	2,0%	0,4%	0,0%
NTV Kyrgyzstan	3,1%	1,2%	2,8%	0,0%	0,0%	0,0%	1,2%	0,0%	2,9%
Region TV	0,3%	0,7%	0,0%	0,0%	0,0%	0,0%	4,0%	1,6%	0,0%
Piramida	2,0%	1,1%	1,7%	0,0%	2,0%	0,7%	0,9%	1,6%	0,0%
Jalal-Abad TV	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	4,6%	0,0%	0,0%
Ilim-Bilim	0,2%	1,4%	0,0%	2,8%	3,4%	0,0%	2,2%	0,6%	10,0%
KTRK(UTRK) Madaniyat-Tarykh	0,0%	0,3%	2,6%	7,0%	2,2%	0,3%	0,9%	0,3%	9,2%
Semeyny	2,2%	0,2%	1,8%	1,3%	0,0%	0,2%	0,7%	0,5%	0,0%
Rossiya 24	2,3%	0,5%	0,4%	0,0%	0,1%	2,9%	0,6%	0,1%	0,1%
Cinemax	2,1%	0,1%	0,4%	2,5%	0,0%	0,8%	0,6%	0,0%	0,0%
Talas TB (UTRK Talas)	0,0%	0,0%	2,4%	14,6%	0,0%	0,0%	0,0%	0,0%	0,0%
Super TV	1,5%	0,2%	1,0%	0,0%	0,0%	0,0%	0,4%	0,2%	0,0%
Mir 24	0,9%	0,0%	0,8%	0,6%	0,0%	2,5%	0,8%	0,3%	0,6%
TNT Kyrgyzstan	1,7%	1,5%	0,4%	0,2%	0,0%	0,0%	0,0%	0,1%	0,0%
Lyubimy/STS/Lyubimy.KG	1,2%	1,3%	1,0%	0,0%	1,3%	0,3%	0,2%	0,0%	0,0%
NUR TV	0,8%	2,8%	1,1%	0,0%	0,0%	1,1%	0,2%	0,0%	0,0%
312 Music	0,0%	0,0%	1,0%	1,5%	0,6%	0,3%	1,0%	0,0%	0,0%
312 TV	0,7%	0,2%	0,6%	3,3%	0,3%	0,0%	0,1%	0,0%	0,9%
Domashniy	0,7%	0,1%	1,4%	0,0%	0,1%	1,1%	0,0%	0,2%	0,0%
Osh Pirim	0,1%	4,3%	0,9%	0,0%	0,0%	0,0%	0,0%	0,1%	0,0%
New TV	0,5%	0,0%	0,5%	0,0%	0,0%	0,0%	0,5%	0,0%	0,0%
Tumar TV	0,3%	0,0%	0,0%	2,2%	2,6%	0,0%	0,3%	0,1%	0,0%
Next TV	1,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%	0,1%	0,0%
Kyrgyz Sport TV	0,0%	0,0%	0,0%	0,3%	0,0%	0,5%	0,7%	0,1%	1,4%
Channel 8	0,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,7%	0,0%	0,0%
Ren TV	0,6%	0,4%	0,1%	0,0%	0,0%	0,0%	0,3%	0,0%	0,0%
Batken TV	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	9,7%
Kazakhstan	0,0%	0,0%	1,6%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Naryn TV	0,0%	0,0%	0,0%	0,0%	6,4%	0,0%	0,0%	0,0%	0,0%
Maral TV	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,6%	0,0%	0,0%
Manas TV	0,1%	0,3%	0,3%	0,2%	0,0%	0,0%	0,1%	0,2%	0,0%
STV (UTRK Chui)	0,5%	0,0%	0,2%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%
Ysyk-Kol TV (UTRK Ysyk-Kol)	0,0%	0,0%	0,0%	0,0%	0,0%	5,5%	0,0%	0,0%	0,0%
Zvezda	0,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,5%	0,9%
Keremet	0,2%	0,1%	0,0%	0,0%	0,0%	0,0%	0,2%	0,1%	0,0%
Asia TV	0,1%	0,0%	0,2%	0,5%	1,0%	0,0%	0,0%	0,1%	0,0%
Marva TV/Nasykat Telekanal	0,2%	0,0%	0,2%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%
RTV	0,3%	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%
UTRK Osh	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%	0,3%	0,0%
2.0 (Two Zero)	0,1%	0,0%	0,4%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Habar	0,1%	0,0%	0,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
KTk	0,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
TV Center	0,0%	0,9%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Yoshlar	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,3%	0,0%

TMG (T Media)	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%	0,0%	0,0%
RT	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Balapan	0,1%	0,0%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
TRT Avaz	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%	0,0%	0,0%
CTV	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,1%	0,0%	0,0%
Event TV	0,0%	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%
Zhibek Zholu Silk Way	0,0%	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%
Other	9,0%	8,5%	5,9%	14,6%	2,8%	3,6%	7,0%	16,9%	6,4%

## APPENDIX 2. RADIO MEDIA INDICATORS BY REGION

### Average weekly reach (AWR), all radio stations

Chart 19. AWR, Bishkek. Data as % of Bishkek dwellers

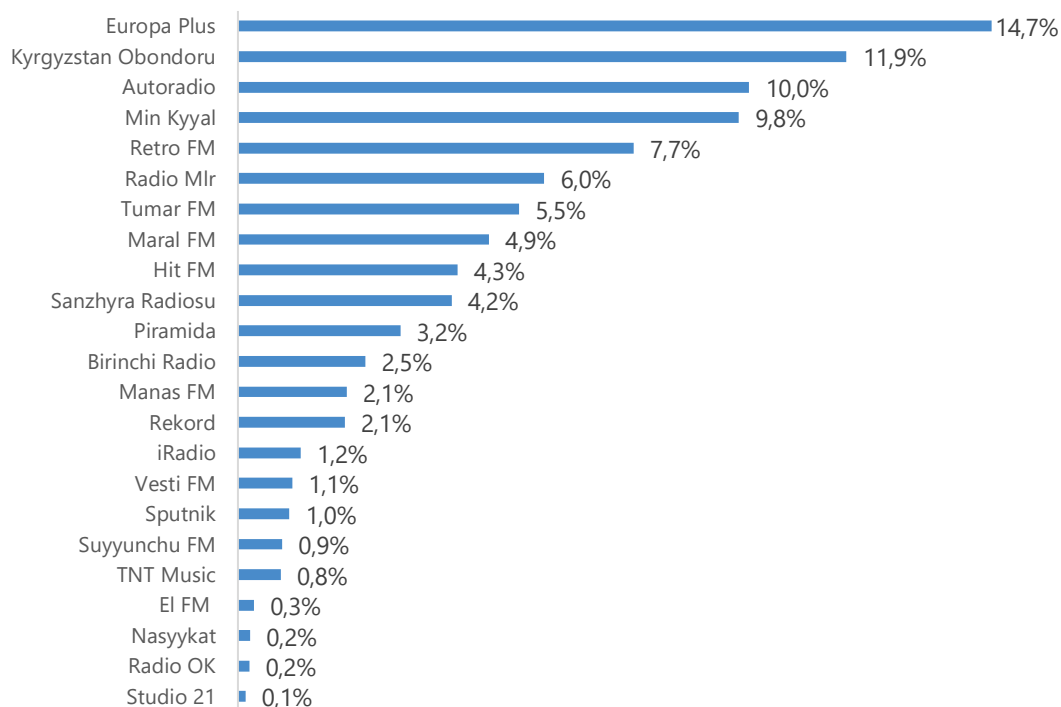


Chart 20. AWR, Chui region. Data as % of Chui region dwellers

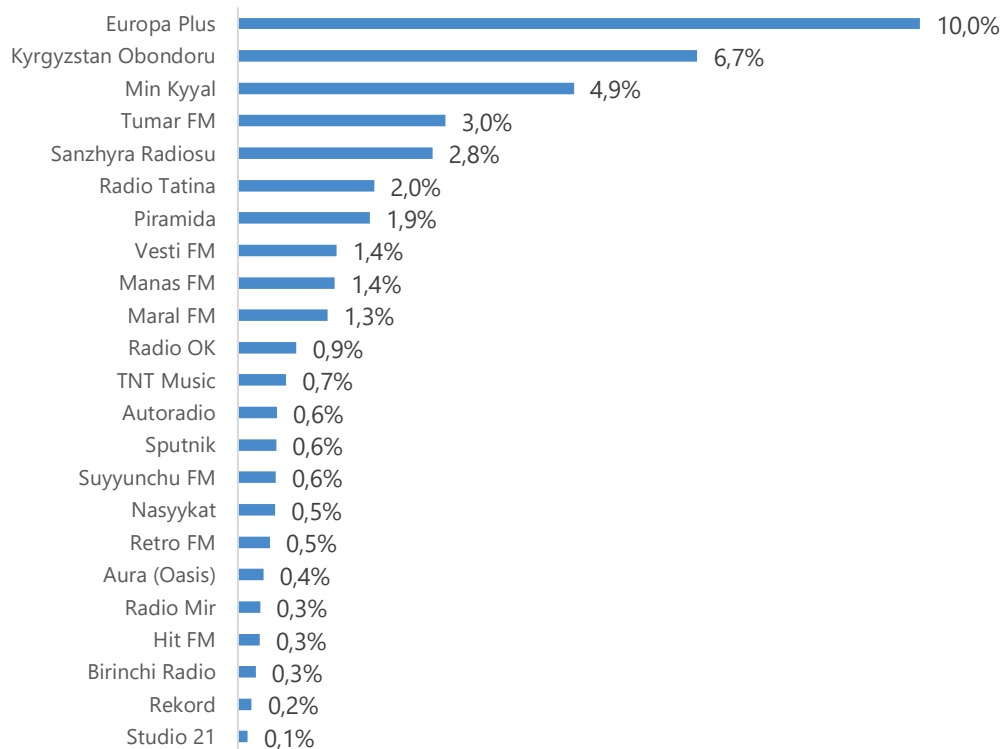


Chart 21. AWR, Talas region. Data as % of Talas region dwellers

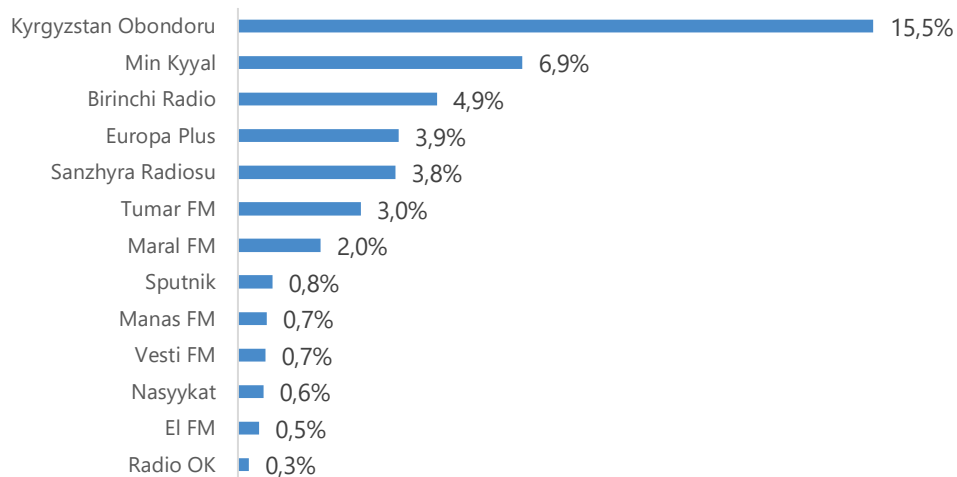


Chart 22. AWR, Issyk-Kul region. Data as % of Issyk-Kul region dwellers

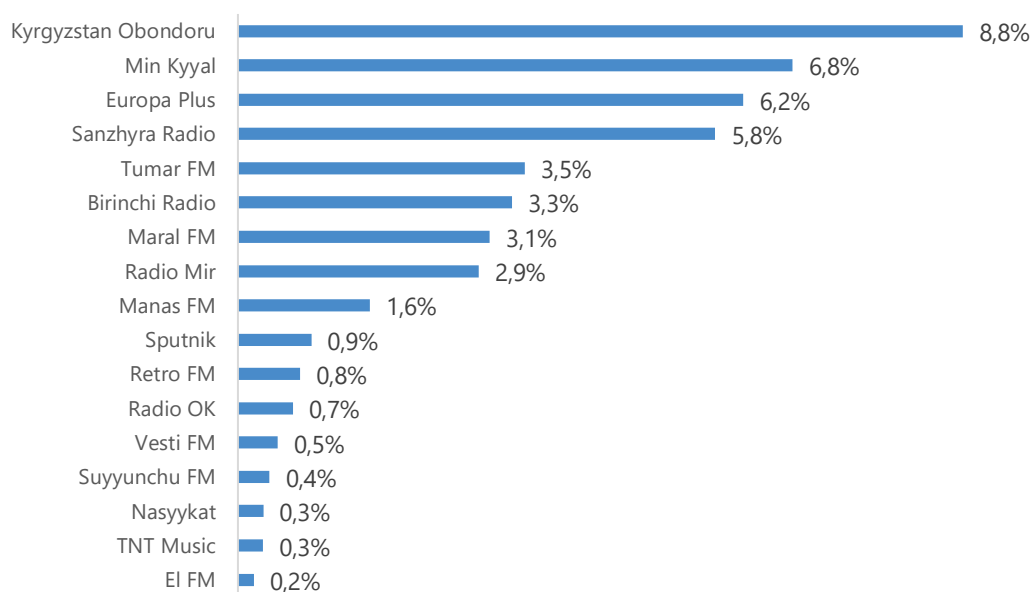


Chart 23. AWR, Naryn oblast. Data as % of Naryn oblast region

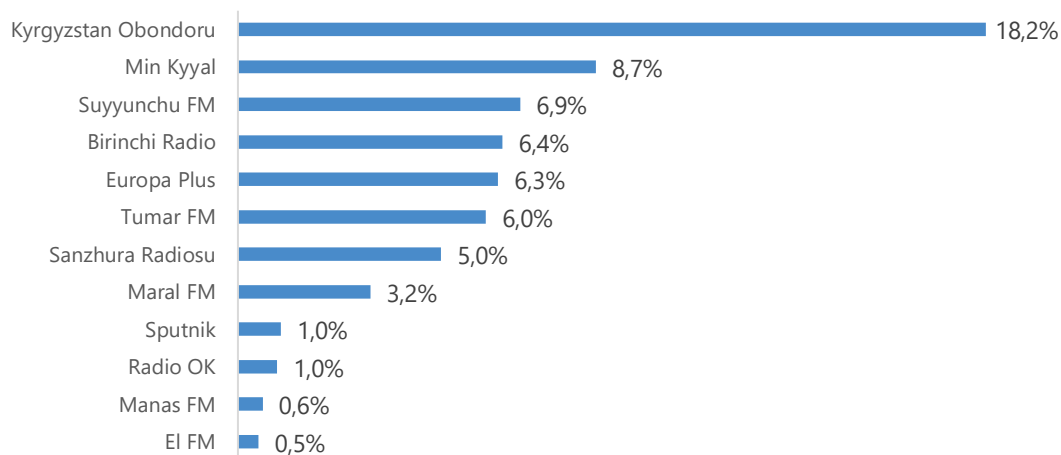


Chart 24. AWR, Batken region. Data as % of Batken region dwellers

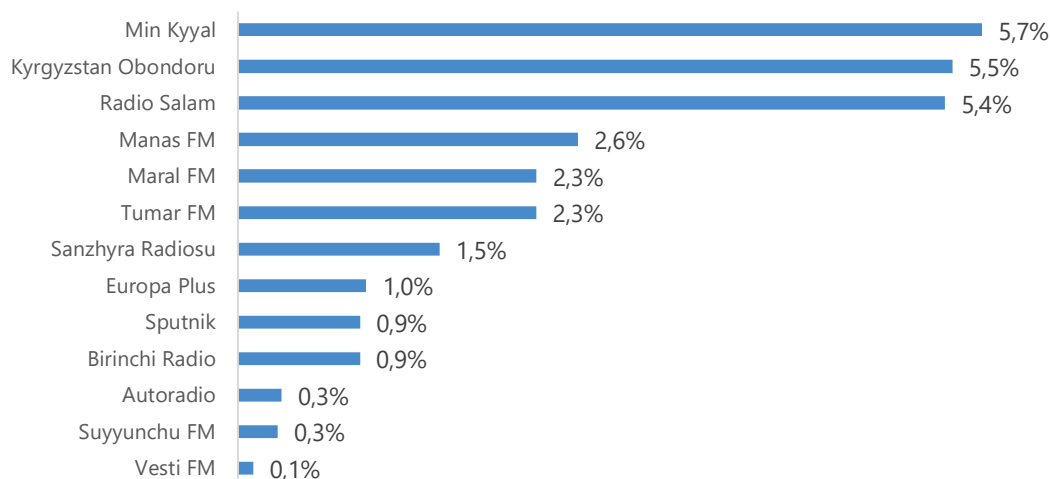


Chart 25. AWR, Jalal Abad region. Data as % of Jalal Abad region dwellers

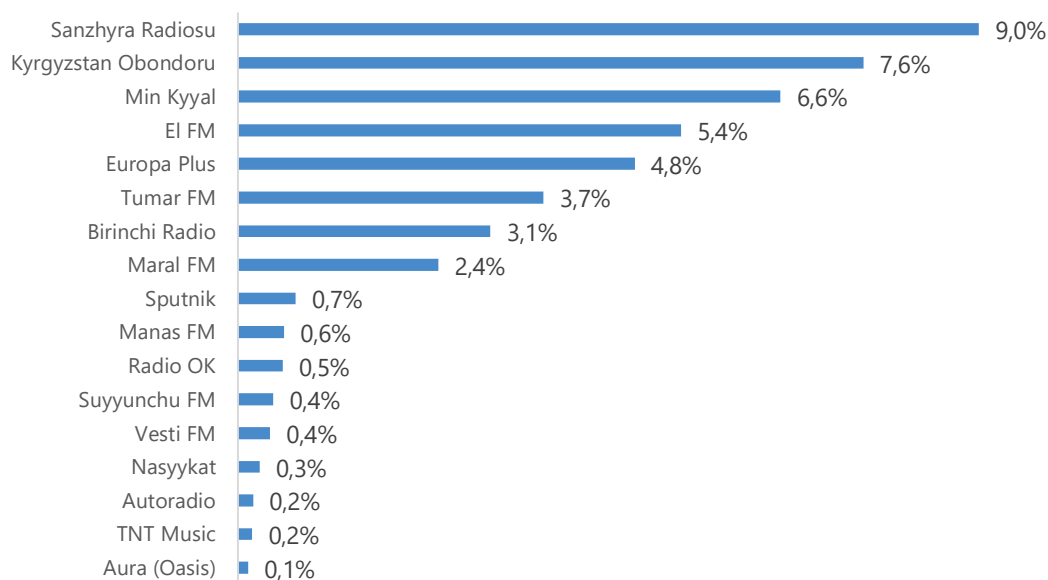


Chart 26. AWR, Osh region. Data as % of Osh region dwellers

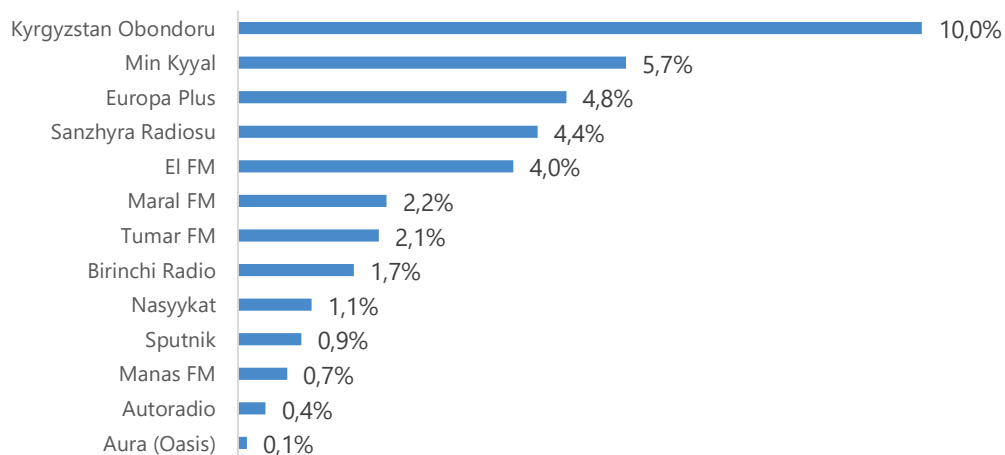
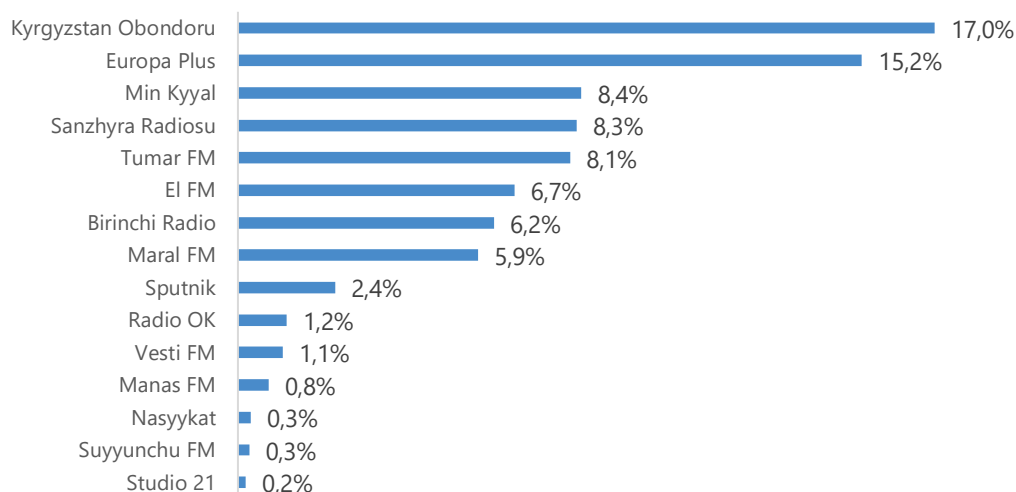


Chart 27. AWR, Osh city. Data as % of Osh dwellers



## Share of total radio consumption (Share)

Table 2. Share of radio by region. % of total radio consumption

Radio station	Bishkek	Osh city	Chuy	Talas	Naryn	Issyk-Kul	Djalal-Abad	Osh	Batken
Kyrgyzstan Obondoru	8,4%	23,9%	8,4%	60,4%	57,8%	22,1%	9,1%	19,0%	9,1%
Sanzhyra Radiosu	6,4%	5,6%	13,0%	2,7%	3,5%	9,7%	1,0%	11,6%	1,0%
Europa Plus	14,3%	34,4%	4,2%	0,7%	8,3%	2,8%	0,0%	11,0%	0,0%
Min Kyyal	4,1%	8,7%	14,4%	14,3%	1,8%	13,0%	26,6%	19,4%	26,6%
Autoradio	10,9%	0,7%	2,3%	0,0%	0,0%	10,8%	2,9%	10,5%	2,9%
Retro FM	13,5%	0,0%	2,3%	0,0%	0,0%	23,3%	0,0%	0,0%	0,0%
Birinchi Radio	0,3%	5,7%	0,2%	8,4%	18,7%	1,3%	0,0%	4,6%	0,0%
El FM	0,0%	11,9%	0,0%	0,0%	0,0%	0,0%	0,0%	5,5%	0,0%
Tumar FM	3,7%	2,2%	1,8%	8,0%	3,5%	0,0%	1,1%	0,8%	1,1%
Hit FM	8,6%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Radio Tatina	0,0%	0,0%	17,8%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Sputnik	4,9%	2,1%	0,0%	0,0%	2,1%	3,0%	0,0%	1,7%	0,0%
Piramida	6,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Radio Salam	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	53,7%	0,0%	53,7%
Suyyunchu FM	4,8%	0,0%	0,0%	0,0%	2,7%	0,0%	0,0%	0,0%	0,0%
Record	3,2%	0,0%	1,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Radio Mir	2,4%	0,0%	1,7%	0,0%	0,0%	3,1%	0,0%	0,0%	0,0%
Maral FM	1,2%	0,5%	2,4%	0,0%	0,6%	9,0%	0,0%	0,2%	0,0%
Vesti FM	0,0%	0,4%	4,2%	0,4%	0,0%	1,2%	0,0%	0,0%	0,0%
Manas FM	0,6%	1,7%	0,6%	4,1%	0,0%	0,0%	1,1%	0,4%	1,1%
Radio OK	0,0%	0,0%	0,2%	0,0%	1,0%	0,0%	0,0%	0,0%	0,0%
Nasykat	0,2%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,4%	0,0%
TNT Music	0,0%	0,0%	0,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Aura (Oasis)	0,0%	0,0%	0,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
iRadio	0,1%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Other	6,2%	2,2%	24,9%	1,1%	0,0%	0,7%	4,5%	14,8%	4,5%