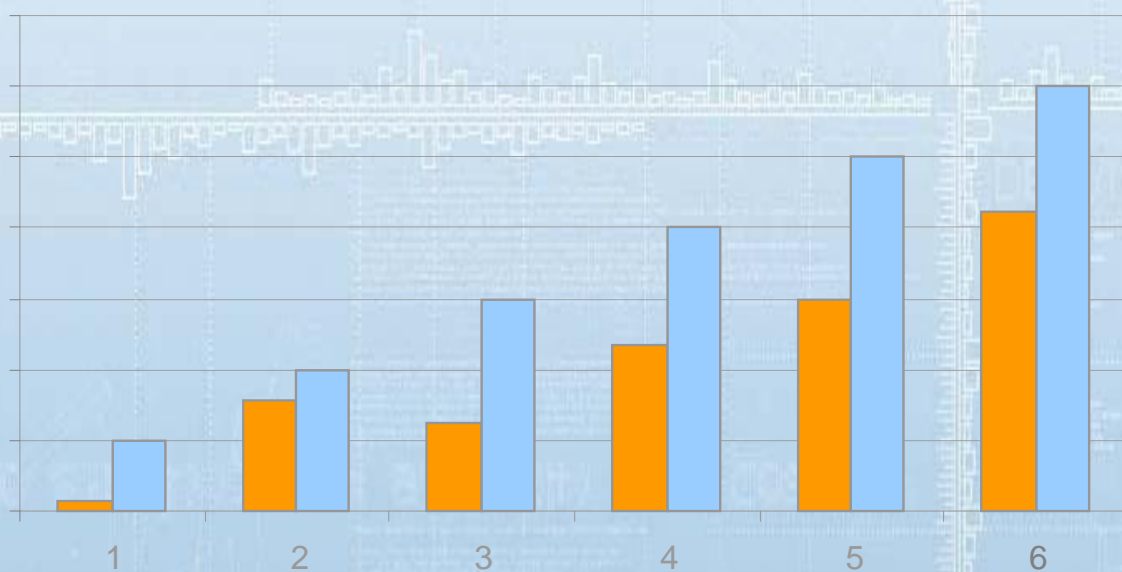




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Media Consumption & Consumer Perceptions Baseline Survey



Part 1: RESEARCH OVERVIEW

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M-Vector Research Agency

42A Ahunbaev St., 2nd Floor
Bishkek, 720064 Kyrgyz Republic
Phone: +996 312 510829; 511815
Cell: +996 543 91 88 12
Web: www.m-vector.com

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1.1. GLOSSARY

U.S.G.	United States Government
KR	Kyrgyz Republic
KRCBI	Kyrgyz Republic Confidence Building Initiative
USAID	U.S. Agency for International Development
IRG	International Resources Group
OTI	USAID's Office of Transition Initiatives
PSU	Primary Sample Unit
Respondent	A person who was selected in a specific way for interviewing.
Interviewer	A specialist, trained to conduct f-t-f interview
F-T-F	Face to face interview. A type of interview with personal verbal contact between respondent and interviewer
ATS	Average daily duration of a channel viewing by the people. Measuring unit: minutes
Share	A number of viewers/listeners of a channel expressed in percentage of total number of television viewers/radio listeners and viewing/listening duration.
TTS	Total time spent of all audience for certain TV channel/Radio station in a certain time-period.
N	The base for % calculation, people
n	Certain group of respondents via question, people

1.2. INTRODUCTION

In May 2010, USAID's Office of Transition Initiatives launched a program in Kyrgyzstan in response to the country's political crises. The U.S. Government (USG) supports the Government of Kyrgyzstan as it restores public confidence in government, adheres to democratic principles, and holds free and fair elections. In the short term, USG assistance aims to preserve democratic processes and promote economic and political stability. The USAID/OTI program supports these aims by promoting reducing the potential for conflict at national and community levels during Kyrgyzstan's initial transition to more democratic political processes that are capable of addressing the underlying drivers of conflict.

The survey was implemented by Kyrgyz Republic Consulting agency «M-Vector» in accordance with USAID and US Government regulations and the Kyrgyz Republic Confidence Building Initiative (KRCBI) subcontract management policies.

The work performed under this survey is in direct response to the KRCBI program Component 1: «Addressing emerging sources of instability and helping to mitigate conflict during Kyrgyzstan's transition to more inclusive and responsive governance».

1.2.1. Objectives of the Study

The main goal of this study is to determine media perceptions of Kyrgyzstan population regarding the sources of information. In terms of achieving the main goal the following objectives were set prior to carrying out of the survey:

1. To collect and provide quantitative data on audience reach and share for radio and television stations currently broadcasting in Kyrgyzstan;
2. To provide data on media consumption and access to various forms of media, including access to print media, internet and cellular phones;
3. To provide data on citizen perceptions of government response to community needs since April 2010;
4. To provide demographic and household data for all respondents in the survey sample.

In addition, the research probed attitudes to media and perceptions about a wider range of social and political issues.

The research findings were invaluable to Kyrgyz media professionals in assessing the size and demographic composition of their respective audiences for both programming strategy and scheduling and to help support marketing initiatives and revenue generation.

It is equally essential to other media-related stakeholders including advertising agencies, media-buying and placement agencies and direct advertising investors and sponsors to ensure their marketing campaigns reach intended audiences in a targeted and cost-effective way.

On the wider front, the research findings will be a valuable guide to governmental and non-governmental organizations and indeed anyone involved in developing effective communication strategies aimed at reaching specific sections of the Kyrgyz population.

1.2.2. Stated Tasks

The following specific tasks were set prior to study requiring customized approach when developing of the research toolkit:

- To determine audience reach (depending on place of residence) using various types of mass media;
- To determine TV ranking (including satellite and cable TV), as well radio station, newspaper and website rankings;
- To evaluate average frequency of watching TV channels, listening to radio stations, reading of newspapers and visiting of websites;
- To determine volume of overall, potential and actual audience reach as for TV, radio, and newspapers;
- To determine TV and radio prime time;
- To determine the most popular programs and columns among TV channels, radio stations, and newspapers;
- To determine level of cellular coverage in the surveyed regions;
- To determine audience purposes/intentions for Internet browsing, inclusive of the most popular websites;
- To determine potential barriers for accessing information resources, and determine level of radio and TV broadcasting quality;
- To determine level of public trust to various mass media in the surveyed regions;
- To determine level of public trust to government social programs, etc.

Active organizational and technical work on collecting and processing of quantitative data has been conducted as to achieve the above specific tasks:

- **Phase One:**
 1. Analysis and questionnaire' adjustment upon Customer comments, questionnaire' translation into Russian;
 2. Translation of questionnaire into Kyrgyz and Uzbek language;
 3. Recruiting of interviewers for field woks implementation;
 4. Preparation for the field work (the selection of interviewers, training);
 5. Pilot survey, questionnaire' adjustment;
 6. Field work (face-to-face interview);
 7. Field work control - 15%;
 8. Coding, data entry and processing;
 9. Matching and cleaning the database;
 10. Reports and presentations preparation.
- **Phase Two:**
 1. Analysis of Data with USAID/OTI Expert Advisor (STTA);
 2. Presentations for Stakeholders and Media managers;
 3. One-on-one Mentoring for Select Stations or Government Offices.

Target group: Population over 18 years old.

Regional coverage: Kyrgyz Republic: Bishkek city, Osh city, Talas, Chui, Naryn, Issyk-Kul, Jalalabad, Osh and Batken oblasts.

1.2.3. Methodology Overview

Under supervision of the USAID representative, M-Vector designed the sample and randomly selected primary sampling units (PSUs). The sampling frames consisted of census data on settlements and their population sizes from the state statistical agencies in Kyrgyzstan.

The sample design had **four stages**. The first stage was the stratification. The primary sampling units were settlements, or voting precincts, depending on the stratum. These were selected using random number generation. Secondary sampling units (SSUs) were households and they were selected using a random walk method. At the third stage respondents were selected within households using the "last birthday" method.

The urban/rural stratification was used because residents of settlements in the two strata were expected to have different answers to the survey questions of interest: respondents in the capital and big cities should have different media consumption than those in rural areas. The sample was distributed amongst strata in proportion to their relative population sizes (with a minimum of one settlement sampled per stratum) in order to minimize margins of error for estimates made for the population size as a whole.

The settlement selection within the strata was carried out randomly using a random number generator. For example, the selection of settlements in the Chuy oblast urban substratum was done using a list of all cities in Chuy oblast assigning a randomly generated number to each one, rearranging the list of settlements in order of the randomly generated numbers and selecting the first n cities.

After the selection of settlements, the sampling team made some necessary changes. Settlements where the estimated number of households divided by the target household sample size per PSU was less than five were removed (the targeted number of households could not be achieved in these settlements).

A sample of households in each selected PSU was selected via random route sampling, a form of systematic sample. The protocol for the random walk varied between urban/rural clusters. However, the protocol for selecting respondents from among household members was the same in both urban and rural strata.

At the last sampling stage, all family members 18 years and older were listed in each household. The household member with the most recent birthday was selected for the interview.

Field work was organized and carried out within 2 working weeks. Every day it was questioned maximum equal number of respondents in each region of the study. In the course of survey it was used international methodology to identify the active media audience: «Dayafterrecall».

The overall findings of the study are presented in the next section.

1.2.4. Survey Sample

Table 1. Study selection

Region	Name of settlement	Distribution of selection
Bishkek	Bishkek	400
Osh	Osh	200
Chui Oblast	Tokmok	80
	Karabalta	50
	Alamudun village	50
	Kemin village	50
	Belovodsky village	50
	Ivanovka village	50
	Sosnovka village	50
	Besh-Terek village	50
	Almaluu village	50
	Kyzyl-Suu village	50
Zhaiyl village	50	
Talas Oblast	Talas	60
	Bakaiata village	30
	Pokrovka village	30
	Kokoi village	30
	Aral village	30
Naryn Oblast	Naryn	60
	At-Bashi village	30
	Chaek village	30
	Dostuk village	30
	Ak-Tal village	30
Issykkul Oblast	Karakul	80
	Balykchy	60
	Kyzyl-Suu village	40
	Ananiev village	40
	Karatalaa village	40
	Taldysuu village	40
Batken Oblast	Batken	50
	Kyzylkia	50
	Samarkandyk village	30
	Karabak village	30
	Uchkorgon village	30
	Kulundu village	30
	Buzhum village	30
	Korgon village	30

Rart 1: Research Overview

Osh Oblast	Uzgen	80
	Karasuu	50
	Nookat	50
	Kara-Tash village	50
	Kara-Shoro village	50
	Buiga village	50
	Shark village	50
	Kurbu village	50
	Village named after Frunze	50
	Kyzyl-Oktiabr village	50
	Kok-Jar village	50
	Tepe-Korgon village	50
	Aravan village	50
	Jalal_Abad Oblast	Jalal-Abad
Karakul		50
Tash-Kumyr		50
Kara-Jygach village		50
Massy village		50
Kyzyl-Tuu village		50
Uch-Bulak village		50
Karamart village		50
Komsomol village		50
Aral village		50
Suzak village		50
Tash-Bulak village		50
Dostuk village		50
TOTAL		3500

1.3. SUMMARY of FINDINGS

1.3.1. Introduction: Media Overview

During the study **3502** respondents were interviewed. Given the need to consider the preferences of the respondents with respect to television and radio programs the survey was carried out on all days of the week so that on each day it was interviewed the same number of respondents. The lowest coverage on the number of respondents: Osh city, Talas and Naryn oblasts, which percentage in total did not exceed 13% of the sampled population, which corresponds to their proportion in the population structure throughout the republic.

Out of the whole study sample (N=3,502), 48,3% (n = 1692) respondents were representatives of the male, 51,7% (n = 1810) - female. Out of the whole study sample (N=3,502), 48,3% (n = 1692) respondents were representatives of the male, 51,7% (n = 1810) - female.

The average household size among respondents was 4.5 persons, however the most numerous on the number of persons age groups within the household are: 18-24 years – on an average 1.3 persons per household, 8-12 years - 1,3 persons, 25-29 years – on an average 1.2 persons.

Out of the total respondents, 65% are from ethnic Kyrgyz, 18.4% - representatives of Uzbek nationality, 10.1% identified themselves as Russian, 6,5% are from other ethnic groups (Turks, Tartars, Dungan, Belarusian, Ukrainians and others). 64.9% of respondents are married, 22.1% - single, 6.4% lost their spouses, and 4.6% divorced ones. 2% of respondents live in a civil marriage.

48.2% of those who were interviewed have secondary education, 20,3% - higher education, 15.9% - specialized secondary, 8.2% - incomplete higher education. 4,9% of the respondents have incomplete secondary education. Kyrgyz language is native to 65,4% of the respondents, another 74,5% speak it well, 71,9% - read well in Kyrgyz.

The largest group among the respondents are housewives - they make 16,7% of the total number of respondents, then it is followed by farmers and pensioners - 13.2% and 11.2% respectively. Unemployed are 10.6% of respondents, general workers - 8,7%.

In KR for 90% of population TV is also a major source of information, 4.4% believe that Radio is the main source, 2% indicated print media and the Internet, 1.7% - inner circle (friends, family). Printings and the Internet increasingly being used by respondents with higher education level, more than 40% of users of newspapers, magazines - among those with specialized secondary education and above, 25.2% and 42.9% of Internet users among people with higher or incomplete higher education, respectively.

By the importance Television also is a leader according to the answers of respondents - 86.7% noted this source of information most important to them, and slightly less - 82.2% answered that it is the most reliable source of information, i.e. 4,5% of the respondents who named the TV the most important to the question about the reliability they selected other media. Radio, Print media, Internet and Inner circle are most important and reliable for 1-4% people of Kyrgyzstan. Television is not only main source of information, but also the frequency of applying to this source is very high: 95% of residents watch TV every day. The second highest frequency of applying - Radio - 60% of daily listening and 28% - 2-3 times in a week. Inner circle and the Internet by the frequency of applying to these sources are almost identical from 42% to 46% of daily applying, from 31% to 35% are use these sources 2-3 times in a week.

1.3.2. Section A: Radio

In Kyrgyzstan, the penetration of radio is 60%, i.e. among three men two of them are radio listeners. For residents of the capital the penetration of radio is similar to indicator of TV viewing and is 98%. In terms of regions it is higher the average indicator of residents of the Batken region, where radio is listened by 83% of the population. The least activeness in using this information resource showed residents of Osh city and the Osh region. In these regions, the penetration indicator was 50% and 30% respectively.

The analysis revealed that men and women are equally radio listeners, while the preferences of different age groups are vary. The most active radio listeners are young people aged 18 to 24 years old.

The largest number of radio listeners is observed among the Russian population - 77%, whereas among the Uzbeks, the number of radio listeners was 27.5%, which is 2,5 times less than that among the Kyrgyz population.

As it was revealed by the level of spontaneous awareness, the most popular radio stations in Kyrgyzstan are Kyrgyz Obondoru, Azattyk and Europe plus. These stations are leaders in the rating of "First named", and so in the overall standings. However, it should be noted that popularity rating for individual radio stations does not exceed 60%. Thus, 53% of radio listeners know about the most popular "Kyrgyzstan obondoru" radio station.

Awareness level of the radio stations is different for urban and rural areas. Despite the fact that in the rating of awareness "Kyrgyzstan obondoru" radio station is a leader, among rural residents it is more popular than among urban. On the other hand, the "Europe plus" radio station in the second position in the rating of urban residents moved into fourth in the rating of representatives of the rural area.

In general, it is traced similar tendencies among young people (in age groups 18-24, 25-34) and older people (35-44, 45-54). The most popular radio station for all age groups except for people older than 55 years old is "Kyrgyzstan Obondoru". Among young people of 18-35 years old the rating positions were as follows: first place - "Kyrgyzstan obondoru", the second - "Europe plus", the third - "Min Kiyial FM" (among representatives of 18-24 years old), and Azattyk news radio (among population of 25-34 years old).

In all oblasts, except Batken, Naryn oblasts, and Bishkek city, the most popular radio station is "Kyrgyzstan Obondoru". In the capital in awareness rating the most popular is "Europe plus", followed by "Kyrgyzstan Obondoru" and "Hit FM". In Osh, along with Kyrgyzstan Obondoru and Europe plus it is popular "Almaz" radio station. Azattyk radio station is among the three most famous in Talas, Issyk-Kul, Batken, Djalal-Abad, Osh and Naryn oblasts. We should also note the popularity of local radio stations Next in the Talas oblast and Salam in Batken.

During the study respondents were asked to name the radio station they listen to more often. In almost all oblasts except Batken and Naryn, "Kyrgyzstan Obondoru" radio is listened to often. In Batken oblast radio listeners prefer the "Salam" radio station, which broadcasts only in Batken city and in Batken oblast, respectively, its content is aimed at coverage of local news and events.

In terms of different income groups the first place in the rating of the most often listened to radio stations is taken by the "Kyrgyzstan Obondoru". The second and the third place are divided with Azattyk and Europe plus. Population with income more than 20,000 soms also prefers such radio stations as "Russkaya volna" and "Hit FM".

In Bishkek, a number of favorite radio stations other than those which listened to by the citizens often top three includes "Hit FM" radio, which displaced the radio Echo Moskv, which was in the third place among the most often listening to radio stations. In Chui oblast the top three of the most favorite radio stations is "Russkaya volna" which displaced

Min Kyial FM radio to the fourth position. Speaking about regional radio stations it should be noted that the most popular in ones region is Salam radio, which broadcasts in Batken region. Issyk-Kul radio station «LW» and Talas «Next» take in their areas the second and the third places respectively.

Favourite types of radio programs:

- ✓ While listening to the radio, the most popular are news and music programs (in the aggregate they were indicated by 80% of respondents).
- ✓ Young people aged 18-24 are more interested in music programs (93,8% of them mentioned Music among other types of radio programs), and older people prefer to listen to the news (91.9% of persons over 54 years also noted the news among the list of various other types of programs).
- ✓ The most popular radio programs in terms of their frequency of mentioning were programs such as: "Music", "News", "Tentek microphone", "Tanke topolon", "Yr dyukon" *on radio Kyrgyzstan obondoru* and "Present", "Music", "Pranks" *on Europa Plus*, "News", "Jany Azattyk / Azattyk+" *on the radio Azattyk*, "Boshbormak", "Svet Jok" on radio Min Kyaal FM, "Assalam Aleikum" *on radio Tumar*.
- ✓ Folk music is the most favorite one (38,1% of radio listeners chose this answer), which is followed by Classics and Pop at almost the same level - 17%.
- ✓ In general, it can be noted that with increasing of age the range of music genres is declining, that is, over time, the listeners begin to adhere to any one music genre, while young people listen to different music genres.

Average weekly indicators:

- ✓ Kyrgyzstan Obondoru radio, Radio Azattyk and Europa Plus gather the largest audience of radio listeners. In this case, the first 2 stations can be attributed to the morning, and Europe plus has more late-night audience.
- ✓ Among rural radio listeners the largest audience is gathered early in the morning from 6 am to 9 am, mostly it is the listeners of Kyrgyzstan Obondoru and Radio Azattyk. In the cities the morning audience is not so large.
- ✓ During the lunch period from 12 pm to 4 pm, an audience of women increases, while the male audience is declining.
- ✓ Kyrgyzstan Obondoru is a popular radio station for virtually all ages among listeners of radio, the Europa Plus has the largest share of audience is reached among young people of 18 to 34 years after 10 pm, and is perceived as the night the radio by all ages; Azattyk, by contrast, is perceived as a morning radio and listened to by an older audience.
- ✓ Nearly two-thirds of radio listeners prefer to listen to radio stations in Kyrgyzstan for several sessions (64.6%).

Показатели аудитории радиопрослушивания (Reach, Share):

Weekly audience among young people from 18 to 34 years old was 65,5%, i.e. 65,5% of the total number of young people of this age were listening to the radio for the last week. Weekly audience of the market leader - the Kyrgyzstan Obondoru radio station was 38,4% of the total population of 18-34 years old.

Such radio stations as "Kyrgyzstan Obondoru", "Europe plus" and "Azattyk" dominate the market by the number of radio listeners. However, radio listeners of "Min Kyaal FM", "Russian wave" remain on their radio waves for a long time, therefore, these radio stations have taken a higher share of radio listening.

Among the population aged 25 to 54 years 57.9% listened to radio during the past week, which is less than the average for the entire country. In general, the positions of radio stations have slightly changed compared with the rating built for the 18-34 y.o. age group. Azattyk Radio Station took 4th place by the share of radio listening by taking a step up compared to the previous rating.

As it turned out, older generation is more interested in news content than in entertainment. Due to this fact, a significant share and leadership position in the market are occupied by radio Azattyk and Echo of Moscow. Chanson radio is also popular.

Nearly two-thirds of males over 18 y.o. listened to the radio last week. Among males, Kyrgyzstan Obondoru, Azattyk radio, Europa Plus are quite popular radio stations having the the largest number of listeners. On the other hand, radio stations which do not have such a large number of listeners are pointed out, but which managed to earn the loyalty of the audience. Russian Wave, Radio Salam and radio Chanson can be attributed to these market players.

Among young males by the share of radio listening the first place is taken by the Europa Plus radio station followed by Kyrgyzstan Obondoru with a lag of a tenth per cent. The format of the Russian Wave radio station is so attractive to young people that taking 8th place by the number of radio listeners, the radio station managed to reach the third position on the share of radio listening.

Males over 55 years old are among the most passive listeners. Size of the weekly audience totaled 46.9%, which is 14% less than national average. In this segment, the most popular are radio Azattyk, Kyrgyzstan Obondoru, Min Kyaal FM, and EI FM and Echo of Moscow.

Among females of 18-34 years Tumar radio station is quite popular, which occupies the third place by share of radio listening. Among males in that age group Tumar radio station occupied only the ninth place.

The level of penetration of radio in the daily lives of the population of Bishkek takes first place in the Republic. Virtually every citizen listens to the radio, especially the high proportion of students among youth aged 18 to 34 years old. Indeed, citizens listen to the radio in public transport, in cars, at work and at home, via mobile phone and via Internet access. The average resident of the capital spends 11 hours a week on the waves of favorite radio stations.

Media market of Bishkek is less concentrated. Radio stations, occupying the first five positions in the ranking, have a share of radio listening of 65% in total. However, the difference between their positions relatively to each other is no more than 2%. It is worth noting that compared to the national ratings, the positions of radio stations broadcasting on the territory of Bishkek and Chui oblast have improved. Also quite significant proportion of the citizens is loyal to the Tumar radio station, which occupies the third position on the share of radio listening.

Three radio stations take similar positions depending of preference of Bishkek city population with higher education: "Europe Plus", "Kyrgyzstan Obondoru" and "Hit FM". Though "Europe Plus" has the largest audience, and Love Radio has the most loyal audience.

Within the survey it was cleared up that the level of radio introduction is the least in Osh city and Osh Oblast from all Republic. A half of south capital citizens informed that they listen to radio. The population in the age from 25 up to 54 years is the most active radio listeners and amount to 56 %, weekly audience among age group which is older than 55 years is the last and amounts to 21%.

In spite of outnumbering of "Kyrgyzstan Obondoru" in amount of listeners, "Europe Plus" takes the first place in radio listening. It is connected with the fact that citizen of Osh city listens to radio "Kyrgyzstan Obondoru" slightly more than hour, whereas listeners of "Europe Plus" hold true to their radio station during 3-4 hours every day. "Tumar", "El FM", "Almaz-South" are considered rather popular radios.

"Europe Plus", "Russkaya Volna", "Kyrgyzstan Obondoru" are 3 the most popular radios among citizens of Chui Oblast. News radio stations such as "Echo of Moscow" and "Azattyk" take together 5,5%. The most loyalty is shown by listeners of radios such as "Record", "Chanson", "Russkaya Volna».

There are 3 popular radio stations in Talas Oblast "Kyrgyzstan Obondoru", "Azattyk Radio" and local radio station «Next». Their joint share of listening is 63,4%.

Citizens of Issyk-Kul Oblast can note the popularity of "Azatyk" radio stations and local "LW" radio. In comparison with other regions "Birinchi Radio" is rather popular.

Osh Oblast has the least number of listeners among citizens in comparison with other regions. Only third part (193 thousand) from all population (648 thousand) listens to the radio. Radio stations, broadcasting in the Kyrgyz language, are in the lead by both market share and listeners number. "Kyrgyzstan Obondoru" takes the first place by market share - 34%, "Azattyk" is the second - 18% and also "EL FM" is rather popular in this region and has the share of radio listening about 15%. Uzbek radio station "Vodii Sadosi " is also in the top five of the best radios, it is popular in south regions of the republic.

A half of Djalalabad Oblast population stated that they listen to radio and hereby the audience of radio listeners is 307 thousand people. In a whole, distribution of preferences is similar with the citizens of Osh Oblast, however "Europe Plus" is also in five top of the largest radio stations at this market, and "Min Kiyal FM " radio station displaced at the 4th place "EL FM" radio by market share due to loyalty of its listeners.

In connection with peculiarity of geographical position, Batken Oblast is covered by radio broadcasting at least degree. Citizens of this region can catch only waves of 6 or 7 radio stations at their radio receivers. In this connection structure of preferences and distribution of market shares in this oblast is rather typical. First of all it is necessary to note that in spite of not great choice of radio stations Batken Oblast is yield only to Bishkek city by listener number. The size of weekly audience is 214 thousand listeners or 83% of general population size. Local radio station "Salam" is indubitable, its audience is 181 thousand listeners, and share of market is 44%. Also population listens to radio stations "Min. Kiyal FM", "Azattyk Radio".

Prime-time:

During morning primetime, it is difficult to separate sole leader. In the interval of time from 7 till 7-30 a.m., "Azattyk" Radio has the maximal audience. Present broadcasting time is the maximal peak for this radio station – 89 thousand listeners are tuned to the present wavelength in order to become acquainted with latest news. During the period from 7-30 till 8-00 a.m. loss of the significant audience is observed. The next audience growth is accounted for the period soon after 7 a.m. However, at present time "Kyrgyzstan Obondoru" is leader. It is interesting to trace the dynamic of radio listeners during the day. The calm during the residual part of day for "Azattyk Radio" set in after morning primetime. "Kyrgyzstan Obondoru" radio has local maximums of audience during the whole day, however the most number of listeners is accounted for evening primetime from 20-00 up to 20-30, when the size of audience reaches 98 thousand persons. "Europe Plus" Radio station arranges interesting morning programs within period from 8-00 till 9-00 a.m., and during the evening broadcasting from 22-00 till 23-00. "Min Kiyal FM" radio station has the most significant audience during the daytime – from 16-00 till 18-00. "Hit FM" radio has pronounced midday primetime.

In weekends, "Azattyk" radio stations has complete primetime; about 108 thousand of citizens switch on radio receivers in order to listen to summarized news for the last week. The midday primetime from 12-00 till 14-00 is characteristic for the other radio stations. In this time "Kyrgyzstan obondoru" capture the maximal audience - 93 thousand listeners. Some local primetimes are observed during the period from 17-00 till 18-30 and from 19-30 till 21-00. However, in present time radio listeners actively balance among the several radio stations and in this connection there is no sole leader.

If during working days, "Kyrgyzstan Obondoru" has the maximal amount of Bishkek listeners, that in weekends "Europe Plus" takes dominant position. Primetime is accounted for period from 10-30 till 11-30 a.m.. In this period the audience of "Europe Plus" amounts to 36 thousand listeners. The second maximal peak for present radio station is in the evening time from 18 till 18-30. Significant "failure" of schedule and listeners loss take place during the period from 14-30 till 17-30, after that there is local flash of radio listening again.

Quality of broadcasting:

More often the radio is listened at home – 73,8% of responses, in 15,5% of cases, people listen to the radio in transport and 9,3% of radio listeners have noted that they very often listen to the radio at work. The residual part (1,4%) includes places of radio listening, which are accidental and have no permanent character.

28,7% of radio listeners have indicated the existence of radio listening problems in their household. At that, according to the pinion of respondents, the highest level of broadcasting defects in Talas Oblast

In the process of investigation respondents have been asked to assess the quality of radio broadcasting, which they listen to. Assessment has been made based on 5 levels: 1 – very bad, 2 – bad, 3- satisfactory, 4 – good and 5 – excellent quality of broadcasting. Practically all radio channels have received high ratings (not less than 4 points, i.e. the rating of quality which is higher than "good"), not the most popular radio stations deserved the highest ratings, nevertheless differences in ratings are rather low among first 8 stated stations (from Russkaya Volna with 4,7 points up to Kyrgyzstan Obondoru with 4,5 points).

Kyrgyzstan Obondoru is the most popular for 25,9% of radio listeners, it puts the best music in opinion of 27,6% of respondents and has the best DJs in opinion of 25,1% of respondents. It is interesting to note the differences in perception of Azattyk Radio, 11,4% of respondents consider that this radio station is popular and nevertheless they give very few comments about the best music (1,4%) and best DJs (3,1%).

In comparison with perception of radio station image, where there are 4 popular radio stations: Kyrgyzstan Obondoru, Europe Plus, Min. Kiyal FM and Azattyk Radio, Azattyk and Kyrgyzstan Obondoru are the leaders according to news parameter, the rest radio channels have been chosen by not more than 5% of radio audience. The most share of practically one third of radio listeners found it difficult to answer the questions about the best news radio. This fact means that there is very low development of radio stations in this direction, i.e. at the present time the majority of radio channels have the priority in development of musical and entertaining content, than informative one. And probably it will be continued during the following years, due to the fact that many costs and qualified personnel are required for development of research and information content.

Practically all respondents (99,9%) found it difficult to indicate the least reliable/objective radio station in terms of information submission. This fact also confirms the situation around the development of informative reporting of events in Kyrgyzstan (There is practically no anything to assess). As for objective source, 46,5% of people found it difficult to reply and 23,3% acknowledge that Azattyk Radio is the most reliable and objective radio.

10,8% of those respondents, who now listen to radio in the Kyrgyz language, would prefer to listen to radio in the Russian language and 5,2% - in Uzbek language. 44 % of those, who listen to radio in the Russian language would prefer to listen in the Kyrgyz language. 21 % of those, who listen to radio in Uzbek language would prefer to listen in the Kyrgyz language and 4,7% of them- in Russian. It can be noted according to expectations, that 64,1% prefer to listen to radio in the Kyrgyz language, 29,8% - In Russian and 5,5% - Uzbek.

1.3.3. Section B:Television

98% of the respondents (n=3433, N=3502) usually watch TV. The level of penetration of television in urban areas is almost the same as in the countryside: 97,2% (n=1267, N=1303) and 98,5% (n=2166, N=2199) accordingly.

The respondents were asked to point out TV channel they are aware of. The majority of the respondents have indicated Channel 1 (ORT) and KTR. Notably, KTR channel occupies a bigger part across the nation (in the entire Republic) whereas Channel 1 is the most known to residents of 5 regions: Bishkek city, Osh city, Chui region, Issyk-Kul region, and Naryn region. In Osh region the most popular is ELTR channel as it has been indicated by 89,7% of the respondents (the lowest information level with regard to this channel is shown in Talas region: 25,7%). It should be noted that only 1% of the Osh residents have indicated NBT channel (beyond the broadcasting zone) - maximum parameter of this TV channel is shown in Bishkek city (80%). Yoshlar channel (Uzbek) is known to 60,5% of residents of Osh region.

In urban areas, 38,2% of the respondents often watch Channel 1, whereas in the countryside 33,8% of the respondents often watch KTR. Channel 1 is the most favorite to 36,1% of urban residents which is two times as much as the number of respondents in the countryside who indicated this channel as the most favorite. Men and women often watch KTR channel, and KTR is the most favorite channel to 31,9% of men and only to 21,5% of women as 24,2% of women have indicated Channel 1 (ORT) as their favorite.

The priority among television programs is given to News. 51,7% of the respondents (n=1768) have indicated this type of TV program. The second place is given to movies (10,8%) and musicals (10,6%).

Issyk-Kul region shows the highest level of news loyalty (63,7% of the respondents in Issyk-Kul region have indicated this type of TV program), the lowest level of preference is shown in the capital city of Bishkek (40,8%). 48,3% of urban residents prefer news (53,8% of rural residents). 12,6% of the rurals prefer drama series (7,2% of urban residents). Movies are preferred by only 13,4% of the urbans and 9,3% of the rurals. 58,3% of men (n=965) prefer watching news which is 8% bigger than the number of women - 45,6% (n=811). Serials are watched by 16,5% of women (4,3% of men), movies - by 12,6% of men and 9,2% of women.

With the increase of years the loyalty to news gets higher: for example, only 30,3% of the respondents in the age from 18 to 24 years prefer news programs, whereas in the age group of 55 and older news are preferred by 72% of the respondent (10% difference between the age groups). Younger respondents in the age of up to 35 years prefer watching drama series, musical videos and films.

The most popular TV programs most frequently mentioned by the respondents are: Davai Pozhenimsya ("Let's get married"), Zhit Zdorovo (a talk show about human health), KVN (a comic program), Pust Govoryat (a talk-show), News, Pole Chudes (an entertaining program), The Verdict of Fashion, Bolshaya Raznitsa (a comic show), The Federal Judge, Vremya (news program), The Fame Minute, Zhdi Menya (a melodramatic program), Good Morning, The Trace (an episodic television series) on Channel 1 and KVN (a comic program), Tamasha-Show, Bravo, Arnoo Concerti, Ala-Too, Zamana (comic and

entertaining programs), Djanylyktar (news program), Azattyk, Ingaisyz Suroolor on KTR channel.

Average weekly indicators (ratings):

Some 60% of television viewers, who had been watching TV during the week prior to the week of polling, watched KTR channel; 52% of them watched Channel 1; 28,3% - ELTR channel. Distribution on other channels does not exceed a quarter of the audience. It should be noted also that 61 respondents were unable to remember any TV channel which she/he was watching during the week prior to the week of polling.

In Bishkek city 71,5% of the respondents watched Channel 1, in Osh city - 60,4%; in Chui region 56,2% of the respondents watched KTR, in Talas region - 88,8%, in Issyk-Kul region - 76,9%, in Batken region - 64,7%, in Djalal-Abad region - 67,5%, in Osh region 54% of television viewers watched ELTR channel, in Naryn region 81,5% watched KTR.

Some executive summaries:

- With the increase of income the general level of television viewing increases;
- With the increase of family income the level of television viewing (audience) of Channel 1 and ELTR also increases;
- With the increase of income the audience dissipates at the lunchtime, i.e. the high-income viewers at the lunchtime more frequently surf from channel to channel in search of new programs, which consequently reflects in the indication of a wide number of TV channels of weekly viewing;

TNT satellite channel has the longest viewing duration for one session in the cities of Bishkek and Osh, and Djalal-Abad and Osh regions. In the cities of Bishkek and Osh, NTS channel has the shortest session duration (64,3 and 49,6 minutes accordingly), in Chui region Channel 5 has the shortest duration (55,7 minutes), in Talas region - RTR and Channel 5 (55,7 minutes), in Issyk-Kul region - NTV (61,7 minutes), in Djalal-Abad and Osh regions - NTS (73,2 and 30 minutes), in Naryn region - STS and NTV (60 minutes for each).

Viewing audience indicators:

Despite the fact that the daily reach of KTR exceeds the reach of Channel 1 by 220 thousand people, it only holds the second place in the viewing market with relative weight of 21,9%, whereas Channel 1, which occupies 22,1%, has gained the leading position. Let's make some conclusions concerning Bishkek viewing market:

- ✓ The young audience in Bishkek in the age of up to 34 years in a less degree prefers KTR channel, and is more loyal to Channel 11, NBT, Echo Manasa and NBT.
- ✓ The people in the age of 55 and older in a greater degree tend towards the Russian-speaking channels: KTR and RTR.
- ✓ Men in Bishkek, in comparison to women, show much interest in the news and less in the entertaining TV channels. Women prefer entertaining programs in addition to basic channels.
- ✓ Active audience of NBT includes the young female population with high income level.
- ✓ Unlike the male audience in Bishkek in the age of 55 and older, women of this age group have a more diversified viewing assortment.
- ✓ The Bishkek audience with the income over 30 thousand soms prefers watching musical channels and is more loyal to entertaining channels.

- ✓ The Bishkek audience with higher education prefers the informative-entertaining programs which is reflected on the loyalty to channels: Discovery, MIR, MTV, NBT, Pyramid, and NTV.

Summarizing the information on Osh city, a number of interesting comments can be made as follows:

- ✓ In comparison with Bishkek, Osh city has a more developed satellite television; at least Osh definitely surpasses Bishkek in the number of satellite TV channels indicated in the survey.
- ✓ With the increase of years the loyalty and viewing volume of Channel 1 in Osh increases, of KTR channel - decreases;
- ✓ Women daily reach in Osh is 10 thousand people bigger than the male audience;
- ✓ Yoshlar channel occupies over 10% of the market which speaks for the presence of the significant part of the Uzbek-speaking population in Osh.

TV Prime-time:

The ratings of KTR and Channel-1 in the national scale, to some extent, are superior to other television channels. The time intervals, namely: in the morning from 07:00 to 09:30, and in the evening - from 19:00 to 22:30 are quite interesting. Despite the fact that in the morning only a small part of active viewers watches TV, KTR channel has a greater loyalty from viewers of their programs at this time. However, the situation changes somewhat when people begin to return from work and switch (or purposefully choose) channels, most audience prefer Channel-1 programs compared to other channels.

On Monday, after a weekend television audience very actively and continuously watches TV in the morning, especially Channel KTR (from 07:00 to 10:00). Then, there is and overall decline in the audience without bursts at lunch time. By evening, the audience grows and at 18:00 (News) reaches its pre-active peak (8,7% on channel-1), after which there is decline in audiences of up to 4%. Channel KTR has very good programs in primetime on Monday, but it nevertheless cannot "overshoot" the audience of Channel-1 news.

Tuesday morning is not much different from Monday, except for some bursts (e.g. from 09:00 to 9:29). The situation at the stage of recovery is similar to Monday (from 16:30 to 18:29). There is a very interesting difference in the ratings of the KTR on Monday and Tuesday. This difference, or rather essential content of the channel make the KTR a leaders at 20:00 with the achievement of 22% of the active audience, despite the fact that even news on the channel-1 in Tuesday at 21:00 are watched by 20.3% of the audience.

Television ratings of the Wednesday have a very mixed environment. On the one hand it is evident that, compared to Monday and Tuesday, KTR channel has a highly fortified positions on Wednesday with the achievement of 26% of active audience in prime time. On the other hand, zigzag leaps of ratings in the morning and during recovery suggests that the audience gets tired of the provided content and tries to switch to another channel, but, either due to lack of an equivalent alternative, or due to more interesting program provided on the channel KTR, the audience returns to KTR. Channel-1 has the similar situation.

Average daily television audience ratings of Thursday have very specific dynamics of the distribution, so in the morning and lunchtime, priority is given to KTR, whereas since the beginning of recovery, and up to 21:00 KTR only loses its positions and eventually is unable to compete with the news content of channel-1. The rating of channel Yoshlar is also very interesting, and exceeds the KTR rating at 20:00 to 20:29.

Average daily audience of Friday (the ratings of channels) is shown in Fig.5.3.137-139. It is worth noting that the KTR channel on Friday has the lowest ratings in prime time,

compared to other days of the week considered earlier. Channel-1 has the highest rating in prime-time that reaches 23% of the active audience in the period from 21:00 to 21:29. Channel Yoshlar also strengthens its positions with 14% peak in prime time.

Unlike the weekdays, on Saturday (and later on Sunday) Recovery starts several hours earlier than usual: from 16:00. The interest of the audience in the news on channel-1 can still be easily traced. The morning audience on the weekends is still active.

Over 10% of active viewers of Kyrgyzstan begin Sunday with watching news programs on KTR channel (Fig. 5.3.143). The same as on Saturday (5.3.140), recovery of audience on Sunday begins at 16:00. In prime time on Sunday, channels apparently struggle for an audience, with the maximum reached by KTR (18,1%), but the duration (the loyalty of the audience) of channel-1 is higher.

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It is worth noting that the rating of ELTR in prime time of Sunday (20:00 to 20:29) exceeds the ratings of such channels as Yoshlar, channel-5, and RTR, with approximate peak of 10% of the average daily active audience.

The quality of TV channels:

The vast majority of respondents (99.7%; n=3,423) watch television in their place of residence, i.e. home. Only less than 7 respondents indicated that they watch television at work and friends' houses. 91.2% (n=3,128) of respondents indicated the availability of access to decimeter (digital) television.

The main causes of the problems with television viewing are the following: lack of time for watching (66%, n=652), sometimes there is no signal (19.6%, n=194), not interested in TV (7.1%, n=71), no electricity (5.1%, n=50), cannot afford to buy television equipment (1.1%, n=11), not allowed to watch TV (2.7%, n=27), problems with adjusting the antenna (2.9%, n=28), disputes with family members when selecting a channel (1.7%, n=17).

During the survey, respondents were asked to evaluate the quality of each television channel they watch. Score was constructed based on the 5 steps: 1 - Very bad, 2 - poor, 3 satisfactory, 4 - good and 5 - excellent quality of broadcasting.

Most popular for 36,9% of viewers is channel-1, which, according to 31.4% of respondents broadcasts the best programs and for another 29.3% has the best TV anchorpersons. However, an interesting fact should also be noted, namely that the difference between the popularity of KTR and channel-1 among the audience is only 14,2%.

More than 60% of respondents found it difficult to indicate the channel with the least reliable / objective information. In respect to an objective source the number amounted to only 28.3%. It is also worth noting that the national channel KTR in terms of objectivity in the perception of viewers surpassed the Channel-1 by 4.4% and amounted to 19.5% of viewers.

Slightly more than 77% of respondents watch TV in two languages: Kyrgyz and Russian. Only 21% of viewers reported watching Uzbek-language programs and channels (Fig. 5.3.156). Highest level of watching TV in Kyrgyz is in southern Kyrgyzstan (except for Osh): Batken region – 88.1%, Jalal-Abad - 92.5%, Osh region (except for Osh) -87.2%. In the northern part of Kyrgyzstan, the Russian language is more common in the preferences of the audience than in the south: Bishkek – 95.4%, Chuy region – 89.4%, Talas region –

79.3%, Issyk-Kul region – 89.1%, Naryn region – 83.6%. The level of Russian-language focus is 96.1%, while the Kyrgyz-language focus is 78.6%.

1.3.4. Section C: Newspapers

Out of all respondents (N=3,502), about 45% (n = 1589) read newspapers. Urban population reads more than rural area population: 56,7% to 38,4%. The most frequently newspapers are read in Talas region (71.8%), then goes Bishkek (63.5%). Moreover, the deviation is rather large and amounts to 8.3%. The lowest percentage of readers is in Djalalabad region – 24.5%.

The reading level of newspapers depends on many socio-demographic characteristics of respondents, the most dependent on the level of education, as well as the type of settlement, in which the respondent lives, and the level of household income, to which the respondent belongs.

Rating:

The most famous in all regions except for Bishkek and Chui region, is Superinfo newspaper, which is also the first in the whole country: 59.2% of the readers know this newspaper. "Vecherniy Bishkek" is in second place in the national ranking of the newspapers (46.9%), which is best known in Bishkek and Chui region. In Talas, Naryn, Osh, and Djalalabad regions, Kyrgyz Tuusu newspaper printed in Kyrgyz language has the second place in awareness among newspaper readers. In the Batken region, the second for the popularity is the local newspaper Batken Tany. The largest number of respondents in all regions, except for Bishkek, likes Superinfo newspaper more than any other. Also Superinfo is first for this indicator in the whole country (45.5%). In Bishkek, more than all other publications, respondents like newspaper Vecherniy Bishkek (56.5%), while by country, it takes the second place (23.5%).

Most readable, as for the whole country, and for most regions separately, is Superinfo newspaper (48,9%). Second place in the national rankings belongs to Vecherniy Bishkek (26.9%), which is ranked first, with a large percentage of 71.6% in Bishkek. The third place belongs to newspaper Delo № (17,0%). They are followed by Kyrgyz-language Kyrgyz Tuusu, and Russian newspaper "Argumenty i Fakty".

About 65% (n=1,033, N=1,589) of the respondents share their papers with other people. Average number of people received the newspapers from others is 2. In terms of polling places there is quite a predictable situation: in rural areas newspapers are shared between more people. Regionally there is the following situation: the highest percentage of respondents who give their newspapers to read other people is in Talas and Chui regions (83.7% and 80.1% respectively), the lowest is in Djalalabad region (61,8%) and Osh city (59.9%).

Total number of respondents who have a subscription to any of the newspapers is small and is only 10.8% of all newspaper readers (n=172, N=1,589).

Most-visited newspaper websites belong to Superinfo (23.2%) and Komsomolskaya Pravda (23,1%), Vecherniy Bishkek is slightly behind them (20.1%).

For 36.7% of the respondents, the most beloved newspaper is Superinfo. Further, as for all other criteria, goes Vecherniy Bishkek (11.8%), Delo № (8,4%), Argumenty i Fakty (3,4%) and Kyrgyz Tuusu (2,8%).

On the question whether the respondents face any problems that prevent reading the newspaper of their choice, 21% of respondents answered affirmatively. Among the main reasons that prevent respondents from reading newspapers of their choice, the following

reasons were named: too high price of publications (49,7%) and the fact that the newspaper is not delivered to their locality (37.4%).

Public perception:

According to respondents, the most reliable source of information is the newspaper Superinfo (17.5%), Vecherniy Bishkek goes slightly behind (15.7%). The remaining named newspapers are far behind the leaders. However, it is worth noting that the composition of the five leading newspapers remains the same: Superinfo, Vecherniy Bishkek, Delo №, "Argumenty i Fakty" and "Kyrgyz Tuusu".

1.3.5. Section D: Internet

To date, the level of penetration of the Internet in Kyrgyzstan is very low, and the Internet at least once was used only by 16.1% of the respondents (n=565; N=3,502). The largest percentage of Internet users is in Bishkek (51.7%), and in Osh, which stands in second place by this index, behind the leader by 32%. The least of all Internet users is in Talas region (3.6%).

The main users of the Internet in Kyrgyzstan are the students (69.4%) and middle managers (65.1%), followed by public officials (32.9%) and workers (30.4%), least of all Internet users are among pensioners (1.8%) and farmers (1.5%).

Slightly more than half of respondents have Internet access from home (52.3%), approximately 40% of respondents use internet at internet-café's, and another 20% go online from work.

Rating of Websites:

For the whole country, the most popular website is postal service www.mail.ru, this website is used by just over 75% of Internet users in Kyrgyzstan. The most popular social network is the Russian project www.odnoklasniki.ru, which is on second place in the overall ranking (34%). Then go news portal www.akipress.org (29.5%) and the agency www.24.kg (28%). The next 3 places are taken by the search engine Google: www.google.com - 27.5%, www.google.ru - 23,6% and www.google.kg - 17.8%. The Russian search engine www.yandex.ru is on 8th place (17%). Web-portal www.diesel.kg is on ninth place, which at the same time is the most popular entertainment portals in Kyrgyzstan. Tenth place again belongs to the search engine: www.yahoo.com.

The frequency of internet use:

More than 50% of respondents in an average spend less than 1 hour a day in the Internet, about 75% - less than 2 hours. I.e. despite the fact that about half of the respondents use the Internet every day, the average time of their presence in the network does not exceed 2 hours.

The level of public trust internet sites:

Respondents, who use the Internet at least several times a week, were questioned about the credibility of the Internet information: and about 85% tend to trust the information from the Internet (26.9% completely trust, 57.8% rather trust), the remaining 15% do not really trust Internet information (12,1% - rather do not trust, and 3,1% - do not completely trust).

In Bishkek, the overall level of confidence in the information on the web sites is high (88.1%), and the percentage of extreme opinions is also higher: complete trust in Bishkek - 26,4%, in Osh - 5%. Do not completely trust in Bishkek - 2,8%, in Osh - 0%.

Purposes for internet use:

The most popular purpose of the Internet visit is to check personal e-mail (68%), and search for the various information and news (64.8%). In the city of Osh, compared to Bishkek, a higher percentage of respondents use the Internet to check personal mail, as well as to visit social networking web-sites and for shopping. Respondents who live in Bishkek, more often use the Internet to find news and information, to search for job, as well as to communicate via on-line chats. It is worth noting that among the respondents in Osh, nobody takes this opportunity to find work through the Internet and chat rooms.

Mobile internet:

95% of respondents (n=535, N=565) have cell phones. Among them, 60% use mobile Internet. Percentage of users of mobile Internet in rural areas (71,1%) is higher than in urban areas (57,1%). Mobile Internet is most popular in Naryn (58.5%), Talas (57.0%) and Jalalabad (44.9%) regions.

1.3.6. Section E & F: Government Performance & Political Processes Perception

An important factor in the study of political participation is the extent of interest in electoral processes, in particular such information as the registration of the voter list and wish to vote on local and national elections. Responses to the question on evaluation of the work of authorities on a five-point scale, where 1 means "very bad" and 5 means "Excellent", the following results were obtained: 2,8-2,9 out of 5 points. The maximum was scored by the National Government - 2.87, and the minimum - by the local government - 2.79.

Work of the National Government during the period from April 2010 was mostly appreciated in the age groups older than 55 years and 25-34 years - 2.94 and 2.91 points respectively. The lowest score was given to the government's work in the age groups 35-44 and 45-54 years - 2.82 and 2.78 points respectively.

The most loyal to local government is the age groups 25-34 and 35-44 years - by 2.84 points, respectively. The lowest score for the work of the government was assigned by the age groups 35-44 and 45-54 years - 2.72 and 2.73 points respectively.

In regards to the work of local authorities, least claims have the age group of 25-34 years - 2.93 points. The minimum score is in the age group 35-44 years - 2.74 points on a five-point scale. Another interesting situation is observed in consideration of the evaluation of authorities in the context of regions.

Most appreciated work of the National Government has been given in Naryn and Osh - 3.4 and 3.26 points respectively. The lowest score - in the Batken region - 2.38 points. Local government, according to respondents, works best in Osh - 3,26 points. The worst is in the Batken region - 2,19 points. Local authorities work best in the Osh region - the average score of 3.07. Worst performance is in the Batken region - 2,35 points.

There are significant differences in grades of rural and urban population on the work of the National Government - 2.93 and 2.77 points respectively, the local authorities - 2.71 and 2.88 points. Regarding the local government, the figures are 2.80 and 2.78 points respectively. In terms of the nationality, the highest scores were given by Uzbek respondents, while the lowest - by respondents of Russian nationality.

The work of the National Government was appreciated most by Uzbek respondents - 3.1 score on a five-point scale, respondents of Russian nationality graded only by 2.6 points.

As for local government and local authorities, assessment by the different nationalities is as follows: 3.0 and 3.1 for the Uzbeks, 2.7 and 2.8 for the Kyrgyz, 2.5 and 2.6 for the Russians.

The work of the National Government from April 2010 least met the expectations of respondents in the sphere of providing jobs - 13% of satisfied with the work in this direction, against 75% dissatisfied, in providing temporary housing for those who need - 29% versus 54% and in the field of trade security - 22% to 68%.

The work of the National Government most met the expectations of respondents in the sphere of providing potable and irrigation water - 50% against 44% of respondents whose expectations were not met, in the education sector - 46% vs. 43%, as well as informational support - 46% to 43%. The most difficult question for the respondents was the issue regarding the providing temporary housing - 12%.

The main areas where the activities of local government least met the expectations of respondents are providing jobs -12%, trade security - 21%, providing temporary housing - 25% and public services - 31%.

The greatest level of satisfaction is in the sphere of providing the water - 44%, education - 43%, and informational support - 40%.

The work of local authorities were rated by respondents as follows: The main areas where the work of local authorities from April 2010 was the least satisfactory are providing jobs - 13%, trade security - 20% and providing temporary housing - 24%. The greatest level of satisfaction is in the sphere of providing the water - 49%, education - 46%, and informational support - 43%.

The greatest degree of satisfaction with international community assistance was received respondents from city of Osh – 3.6 points on a 5-point scale, followed by Bishkek and Talas - 3.3 points each. The lowest grades were given by Batken and Issyk-Kul regions - 2.8 and 2.9 points respectively.

In Osh, the level of assistance among the respondents was 76%, in Jalalabad and Osh regions - 20% and 21% respectively. The smallest percentage of respondents who received humanitarian assistance was recorded in Chuy region and Bishkek – 3%. In Talas region, no respondents who received any aid (government or humanitarian) were indicated.

Among the representatives of Kyrgyz nationality - 10%, among the Russian ethnic group - 8%. At the time of the research, humanitarian assistance was continued to be received by 4% of the total number of respondents, or 31.5% of those who had received earlier. By regions, number of people still receiving the assistance has decreased disproportionately.

The largest percentage of respondents still receiving assistance has remained in the Naryn and Batken regions - 87% and 75% respectively. Moreover, in Osh 52% of respondents who has received assistance before, are still getting aid. As for the Osh region, the same figure amounted to 4%. Out of the total respondents, the majority (91%) are registered at precincts.

The vast majority of respondents are willing to vote on both elections - 90% in the local authority elections and 92% in the presidential elections.

The most number - 68% of respondents - in Osh region believe in the electoral system, the least number is in Bishkek - 42% of respondents.

For the question on how the political situation in the next year is going to change, 50% of respondents answered positively, 29% said that situation will not change, while 9% answered negatively.

The most popular tool for influencing the "course of events in the country" is to vote for those whose point of view is supported by respondents - 42%. 20,5% believe that there is nothing we can change. 16% of respondents failed to answer.

1.3.7. Section G: Demography and Living Standards

The study was carried out among residents of all regions of the Kyrgyz Republic, as well as in Bishkek and Osh cities. The object of the study was a permanent population of Kyrgyzstan, at the age of 18 years and older. Criteria of socio-demographic identity of the respondents were:

- ✓ Gender;
- ✓ Age;
- ✓ Marital status;
- ✓ Education level;
- ✓ Native language, as well as languages in which respondents are speak and read well;
- ✓ Distribution of respondent's own income and gross income of his/her family;
- ✓ Main occupation;
- ✓ Nationality and religion.

During the study **3502** respondents were interviewed. Given the need to consider the preferences of the respondents with respect to television and radio programs the survey was carried out on all days of the week so that on each day it was interviewed the same number of respondents:

Table 4.1 Distribution of respondents by day of week, %

Surveying day of respondent	In % of total number of respondents
Monday	14,2
Tuesday	15
Wednesday	14,9
Thursday	14,5
Friday	13,9
Saturday	13,2
Sunday	14,3
Total:	100

The structure of the sampled population by region of the study is presented in Table 4.2, which shows the maximum share attributable to the Osh oblast.

Table 4.2 Distribution of respondents by oblasts, %

Region	Number of respondents, persons	In % of total number of respondents
Bishkek	643	18,4
Osh	157	4,5
Chui oblast	569	16,2
Talas oblast	145	4,1
Issyk-Kul oblast	285	8,1
Batken oblast	259	7,4
Djalalabad oblast	610	17,4
Osh oblast	689	19,7
Naryn oblast	144	4,1
Total:	3502	100

The lowest coverage on the number of respondents: Osh city, Talas and Naryn oblasts, which percentage in total did not exceed 13% of the sampled population, which corresponds to their proportion in the population structure throughout the republic. Out of the whole study sample (N=3,502), 48,3% (n = 1692) respondents were representatives of the male, 51,7% (n = 1810) - female. In terms of regional studies, gender ratio is as follows:

Table 4.3. Gender distribution of respondents by oblasts, %

Region	Male (n=1 692)	Female (n=1 810)
Bishkek	43,6	56,4
Osh	47,1	52,9
Chui oblast	50,3	49,7
Talas oblast	59,3	40,7
Issyk-Kul oblast	41,8	58,2
Batken oblast	47,3	52,7
Djalalabad oblast	47,0	53,0
Osh oblast	52,8	47,2
Naryn oblast	49,7	50,3
Total:	48,3	51,7

Out of the total interviewed 37.2% of respondents live in urban areas, 62,8% - in rural areas. Age structure of the sample is as follows:

Table 4.4. Distribution of respondents by age groups, %

Age	n	%
18-24	891	25,4
25-34	833	23,8
35-44	699	19,9
45-54	560	16,0
55 and older	516	14,7
Refused to answer	5	0,1
Total:	3 502	100

In the Table 4.4 we can see an objective sampling bias toward younger people, so in many areas, respondents aged 34 years hold only a little less than 50% of the sample. Another 5 respondents for various reasons found it difficult to indicate his/her age. The population of Osh oblast and Osh city is younger: More than 53% of the sample in these regions was the persons under the age of 34. Population in the Chui and Talas oblasts was older than in other oblasts: Over 33% of the population is aged 45 years and older.

It may be noted that the sample of the study fully repeats the fractional structure of the total population (Census of Kyrgyzstan 2009).

Despite the fact that the study involved 3,502 people, the information given by them for the most part characterizes not only by preference and behavior of the respondents themselves when choosing a source of information, during the survey it took place a

description of households itself as the minimum sampling units. In this regard it is necessary to consider the structure of households regarding their dimension.

The average household size of respondents in the age division is presented in Table 4.5:

Table 4.5. Portrait of a household, people

Age group	Average number, persons
Under 6 months	1,0
6-12 months	1,0
1- 2 years old	1,1
2-4 years old	1,1
5-7 years old	1,1
8-12 years old	1,2
13-14 years old	1,1
15-17 years old	1,2
18-24 years old	1,3
25-29 years old	1,2
30-34 years old	1,1
35-39 years old	1,1
40-44 years old	1,2
45-49 years old	1,1
50-54 years old	1,2
55 years old and older	1,2
Average family size, persons:	4,5

As seen from Table 4.5, the average household size among respondents was 4.5 persons, however the most numerous on the number of persons age groups within the household are: 18-24 years – on an average 1.3 persons per household, 8-12 years - 1,3 persons, 25-29 years – on an average 1.2 persons.

Out of the total respondents, 65% are from ethnic Kyrgyz, 18.4% - representatives of Uzbek nationality, 10.1% identified themselves as Russian, 6,5% are from other ethnic groups (Turks, Tartars, Dungan, Belarusian, Ukrainians and others).

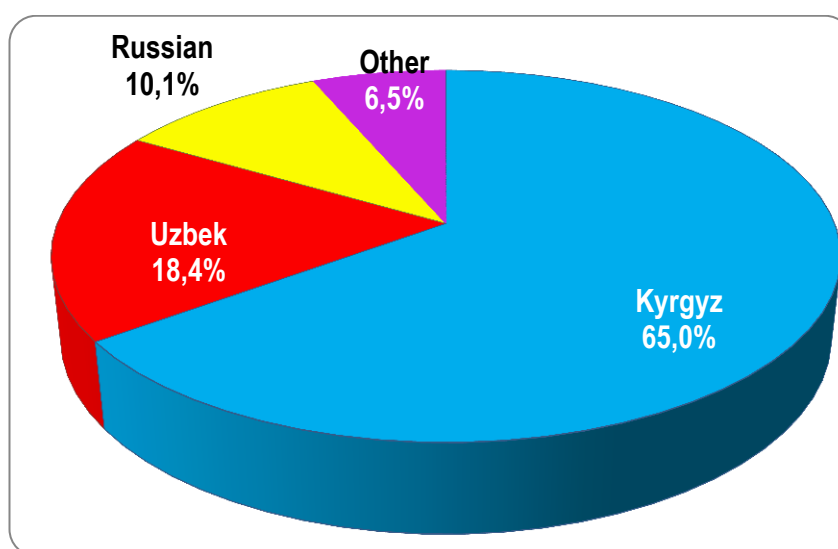


Fig. 4.1. Distribution of respondents by nationality, %

In terms of marital status 64.9% of respondents are married, 22.1% - single, 6.4% lost their spouses, and 4.6% divorced ones. 2% of respondents live in a civil marriage.

Table 4.6. Marital status of respondents, %

Marital status	Number, persons	In % of total number of respondents
Single	774	22,1
Married	2272	64,9
Divorced	162	4,6
Civil marriage	69	2,0
Widower/widow	225	6,4
Total:	3502	100

By level of education respondents are as follows:

Table 4.7. Education level of respondents, %

Education	Number, persons	In % of total number of respondents
Incomplete secondary	170	4,9
Incomplete elementary	34	1,0
Elementary	26	0,8
No education	20	0,6
Secondary	1689	48,2
Higher	711	20,3
Specialized secondary	556	15,9
Incomplete higher	288	8,2
Refused to answer	7	0,2
Total:	3502	100

48.2% of those who surveyed have secondary education, 20.3% - higher education, 15.9% - specialized secondary, 8.2% - incomplete higher education. 4.9% of the respondents have incomplete secondary education. Kyrgyz language is native to 65.4% of the respondents, another 74.5% speak it well, 71.9% - read well in Kyrgyz.

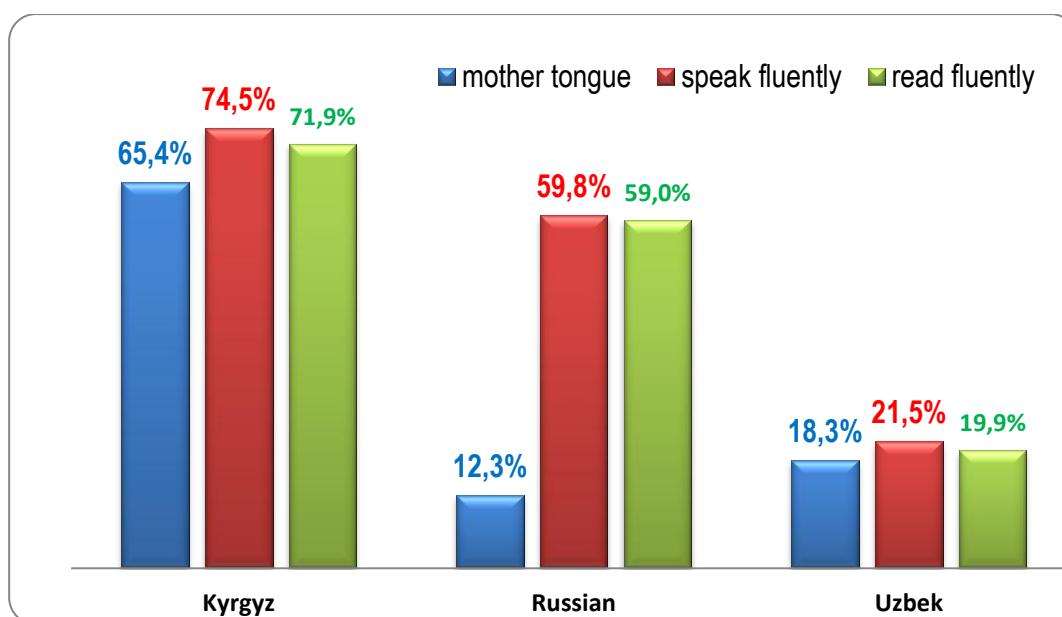


Fig. 4.2. Distribution of respondents by the native, spoken and reading language, %

Russian is native to 12,3% while 59,8% of respondents are speak it well, another 59% are read well in Russian.

Uzbek language is native to 18,3% of the population, 21,5% speak and read it well - 19,9% of the population.

Concerning question of religion 88% of respondents indicated Muslim, 11% are Christian. 1% of the sample is other religions.

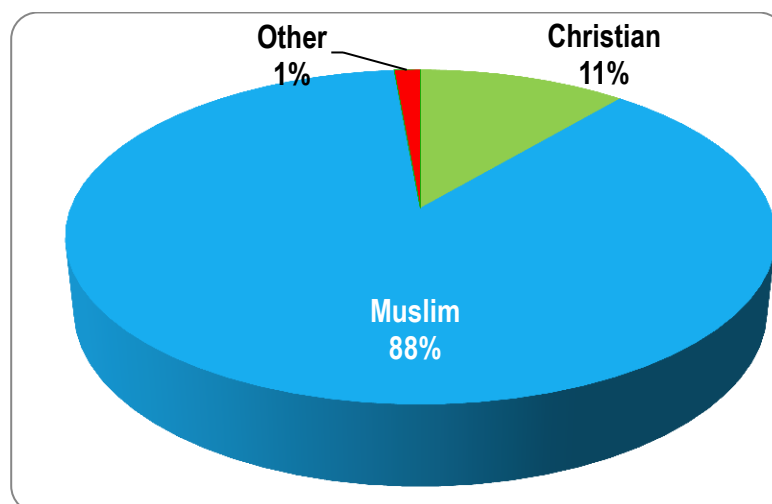


Fig. 4.3 Distribution of respondents by religious affiliation, %

As for the basic occupation of the respondents we can note the following groups:

Table 4.8. Basic occupation of respondents, %

Scope of activity	Number, persons	In % of total number of respondents
Housewife	584	16,7
Farming	461	13,2
Pensioner	392	11,2
Unemployed	370	10,6
General worker/Unskilled worker	305	8,7
Student	244	7,0
Skilled worker/technical specialist	232	6,6
Small undertaker	218	6,2
Public servant	177	5,1
Livestock farming	169	4,8
Other	350	10,0
Total:	3 502	100

The largest group among the respondents are housewives - they make 16,7% of the total number of respondents, then it is followed by farmers and pensioners - 13.2% and 11.2% respectively. Unemployed are 10.6% of respondents, general workers - 8,7%.

In terms of the level of monthly income 29,4% of the respondents indicated that they have no income (which is not surprising to youth prevailing), 29% have income of 2-5 thousand soms, and 11,8% of the respondents indicated income of less than 2 thousand soms , 8,7% of the respondents have income of less than 2000 soms (Figure 4.4).

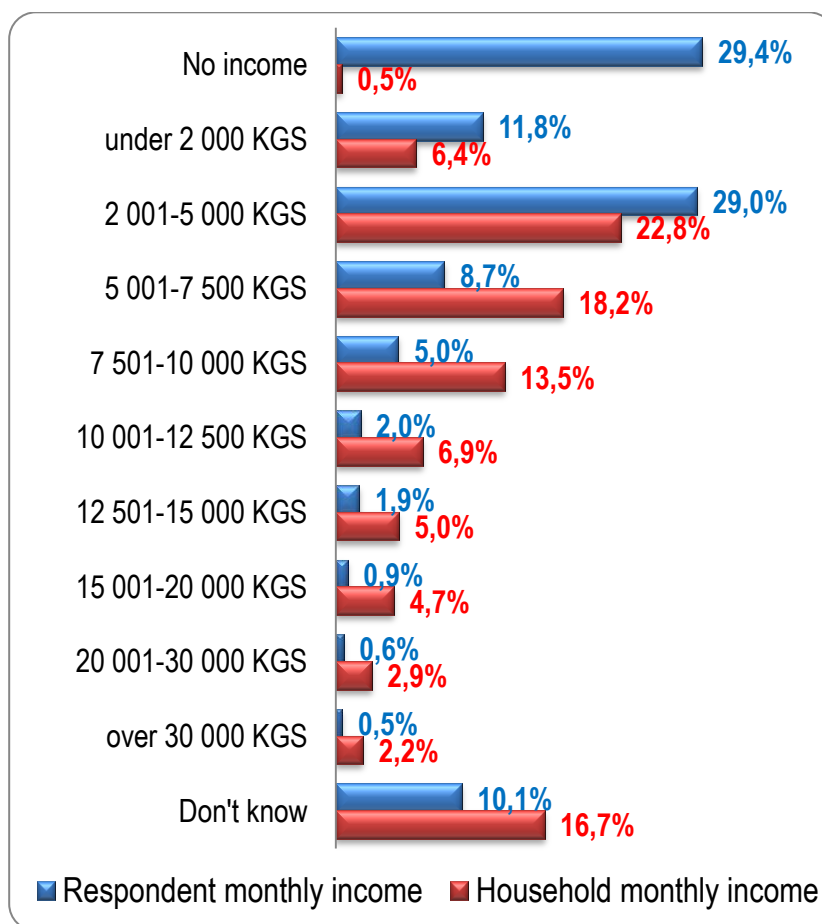


Fig. 4.4 Distribution of the respondent's own income and total income of his/her family, %

With respect to monthly household income, 22.8% of respondents indicated the amount 2000-5000 soms, 18.2% indicated 5000-7500 soms, for 13,5% of respondents this sum is equal to 7500-10000 soms. 16,7% of respondents had difficulty in answering question of the level of prosperity.

The biggest cost item among all the respondents are the costs to food, on an average, one household spends 4,500 som per month for this type of expenditure. Average monthly costs to entertainment and electronic equipment are on an average 760 and 363 som, respectively. For payment of cellular communications it is spent on an average 433 soms, to newspapers and magazines - 120 soms.

In addition, respondents were asked a number of questions describing in detail their socio-economic status.

With respect to question of a permanent residence, 92,8% of respondents answered yes, 7,2% - no. Electricity is used by 99,3% of the respondents, the generator is used by 3.1% of the population.

33,8% of households have one or more cars, a similar rate for motorcycles is 2.1%. 69,8% of respondents have a cell phone, 28,9% of the total amount have fixed telephone line. At the same time 23,4% of the respondents have neither one nor the other type of communication. 65.1% of population have electric or gas stove with oven at home, coal for cooking is used by 64.1%, and wood - 69,3% of the population.

Respondents are sometimes reluctant, but answered questions about the availability of certain appliances or conveniences, which indirectly characterize their financial status:

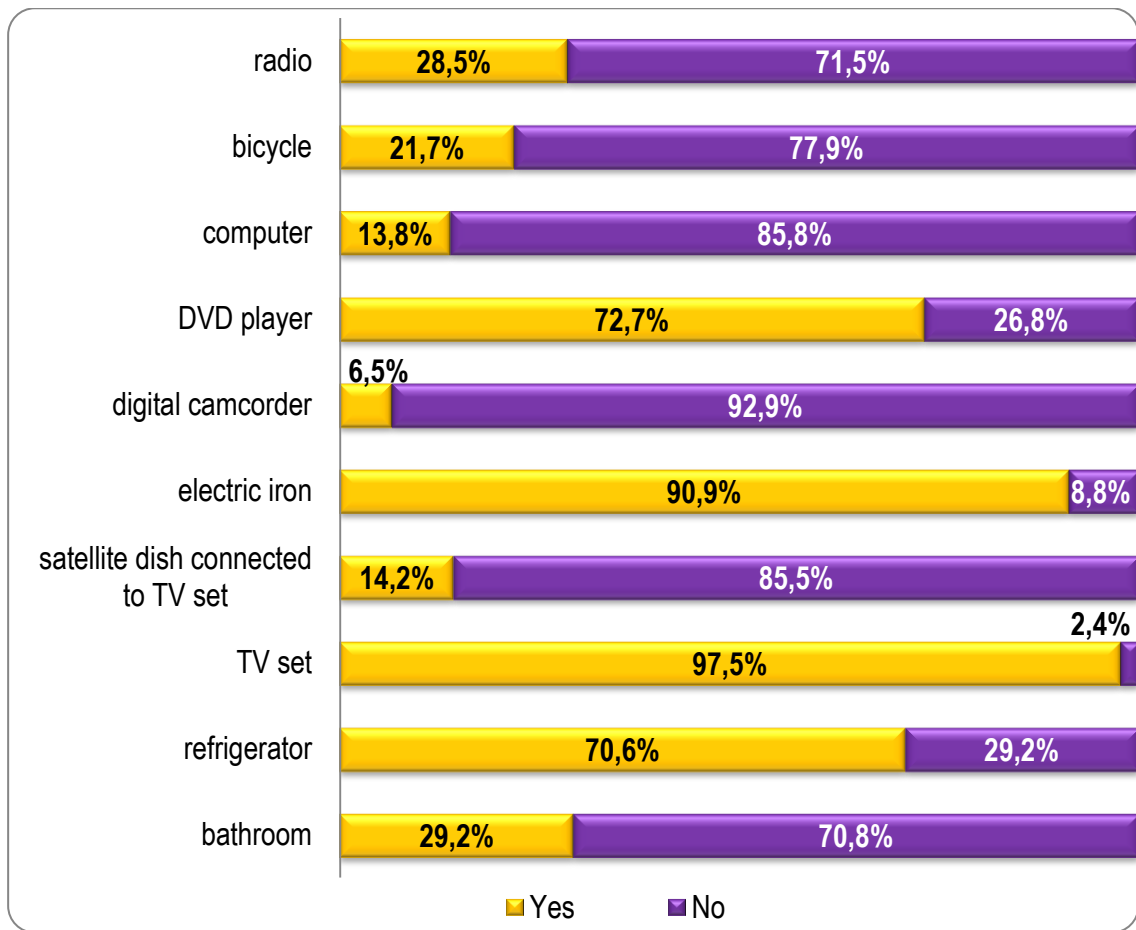


Fig. 4.5 The respondents' answers to questions about the availability of household appliances, %

29,3% of the respondents have bathroom, 70,6% have a refrigerator, 97,5% have TV set, and a satellite dish to it - 14,2%. 90.9% of respondents have electric iron, DVD-Player - 72,7%, a computer - 13,8%, a bicycle - 21,7%, and only 6.5% of the surveyed households have digital video camera.

28,5% of respondents have home radio, among them 87.9% - FM radio set, 7,1% medium-wave MW or SW set. 88,7% of the radio is powered from the network, and 19,1% - from batteries.