

Media Research 2013

Top Lines 4th wave



Media research

- **Main goal** – development of the national media market
- **Main objective:**
 - Provide practical information for evidence-based decision making on regular basis
- **Beneficiaries:**
 - media market actors (TV, radio, advertising, content producers)
 - NGOs
 - International organizations
 - Government offices

...for TV and Radio

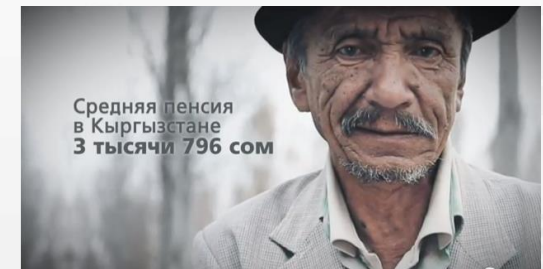
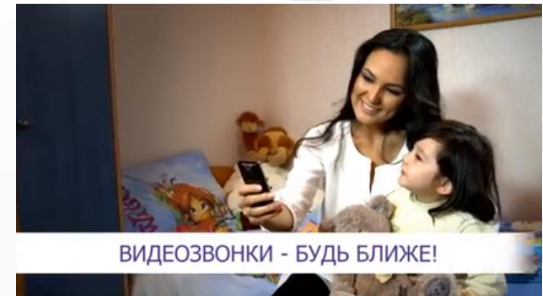
...for decision-making process about:

- How to increase audience and the time of viewing/listening?
- How to retain audience?
- How to optimize scheduling?
- How to justify pricing policy?
- How to increase the advertising sales?
- Evaluation of channels'/stations' activities.



... for advertisers

- To increase efficiency of marketing and advertising budgets / ROI
- To improve targeting of communication messages
- To communicate effectively with the target audience
 - Identify channels/radio stations consumed by the audience
 - Particular time of viewing/listening
 - Frequency of viewing/listening
 - Consumer media preferences



... **for content** producers and clients

for decision-making:

- What type of content should be produced? What topics should be addressed?
- Identify audience preferences for content



for existing content:

- To identify channels for broadcasting partnerships
- To make a justification for investors and sponsors

... and for end-users:

VARIETY/ QUALITY/ LOCAL PRODUCTION

Media Research project

KRTI/USAID program

Joint Media Committee
Engagement of market actors

2011
February

- Sample: 3500 respondents
- Audience: KR population above 18
- Sections: TV, Radio, newspapers, Internet, special section

2012
June

- Sample: 2400 respondents
- Audience: KR population above 18
- Sections: TV, Radio, newspapers, Internet, special section

2012
December

- Sample: 2400 respondents
- Audience: KR population above 14
- Sections: TV, Radio, newspapers, Internet

2013
September

- Sample: 2400 respondents
- Audience: KR population above 14
- Sections: TV, Radio, Internet, Life Style

Methodology

- **Target audience:** population of Kyrgyzstan above 14;
- **Type of research:** quantitative;
- **Survey method:** semi-structures personal interviews;
- **Languages:** Kyrgyz, Russian, Uzbek;
- **Filed work period:** September 9-15, 2013 ;
- **Sampling:** stratified random sampling;
- **Sample size:** 2400 respondents;
- **Confidence level:** 95%;
- **Field staff:** 70 people;
- **Field work control:**
 - ✓ Training of interviewers and supervisors;
 - ✓ 100% control during hand over of questionnaires: completion check, logic check;
 - ✓ 10% control by a repeat visit of respondents;
 - ✓ 10% control by a phone call.



Research Stages

Conducting a Media Forum

Developing methodology and survey toolkit

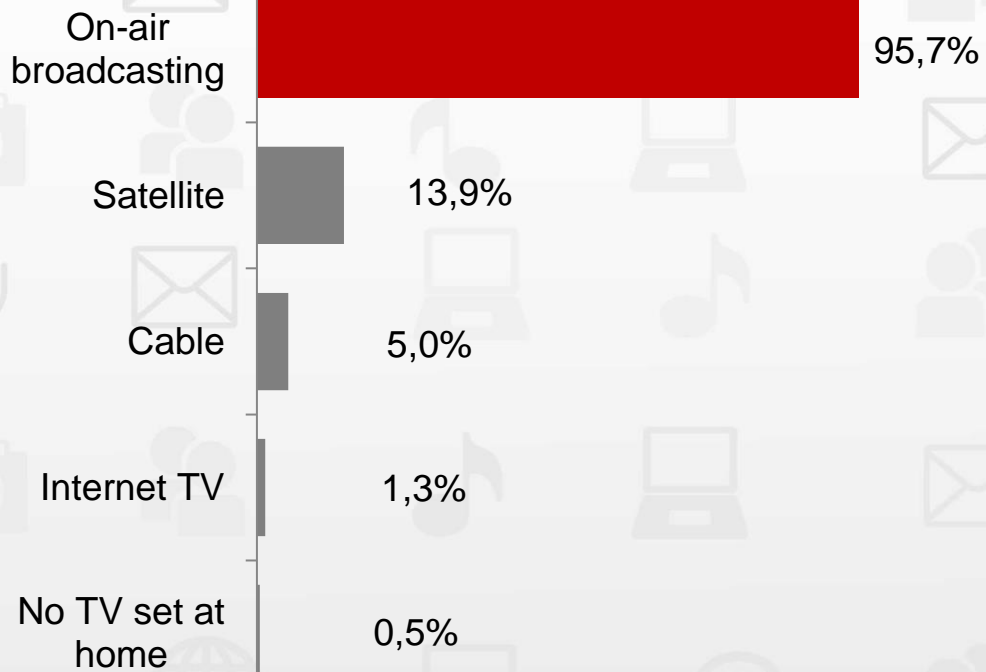
Conducting field work

Data processing and analysis



TELEVISION

Types of Television





Average weekly TV audience / Average Weekly Reach

Average number of viewers, who spent at least 5 minutes watching TV within a 7 day period

Average Weekly TV Reach

Kyrgyzstan

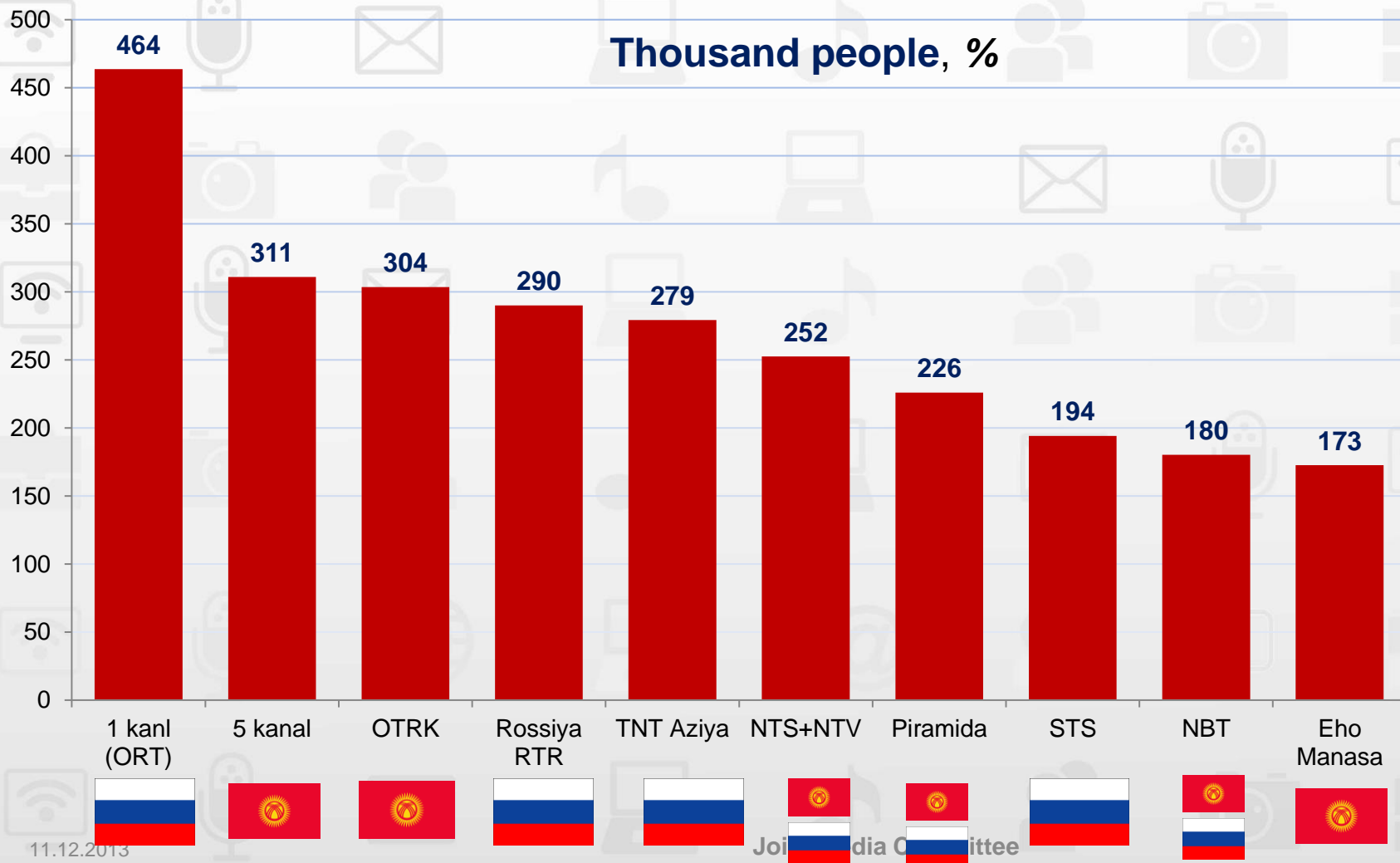
Thousand people, %



Average Weekly TV Reach

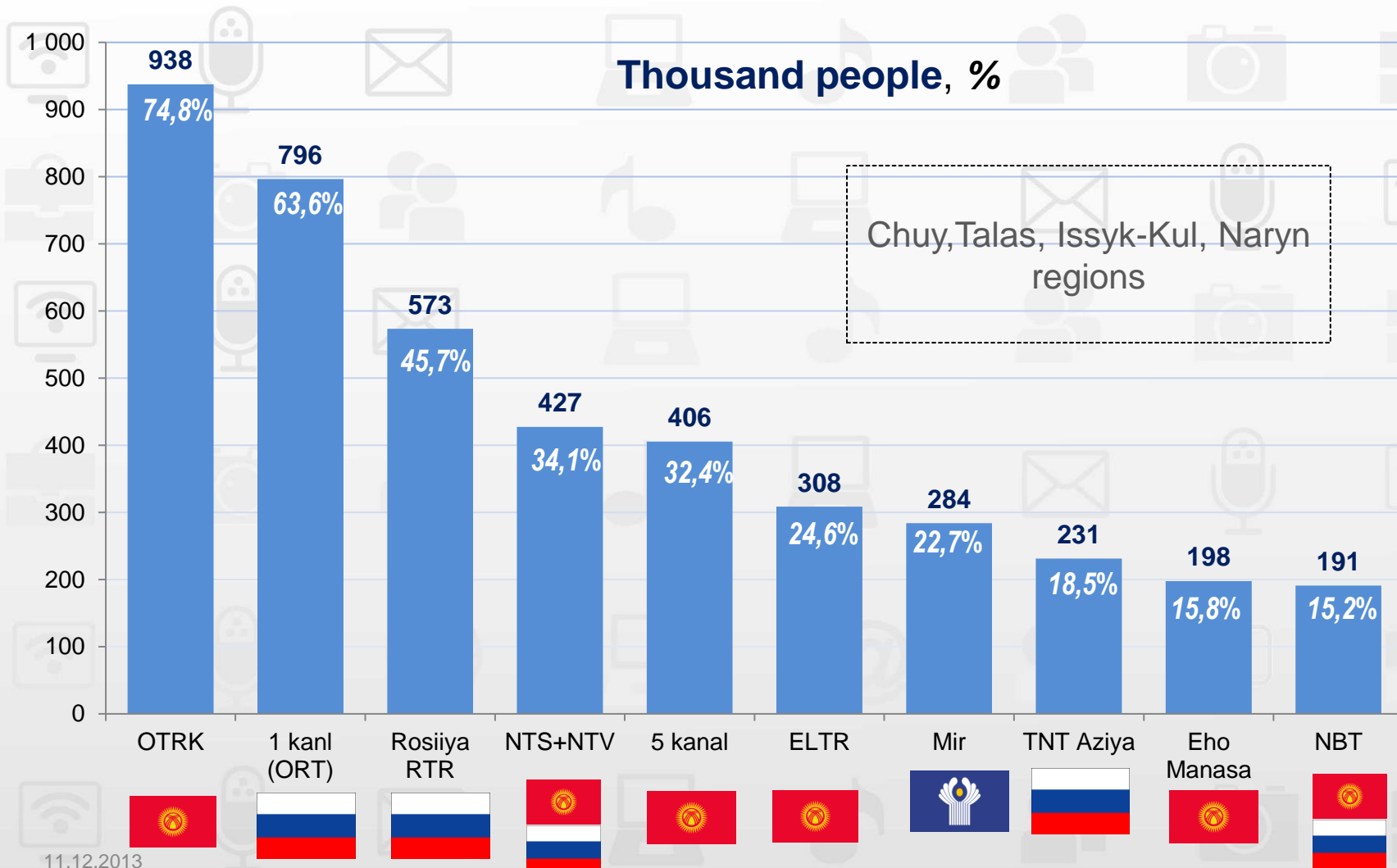
Bishkek

Thousand people, %



Average Weekly TV Reach

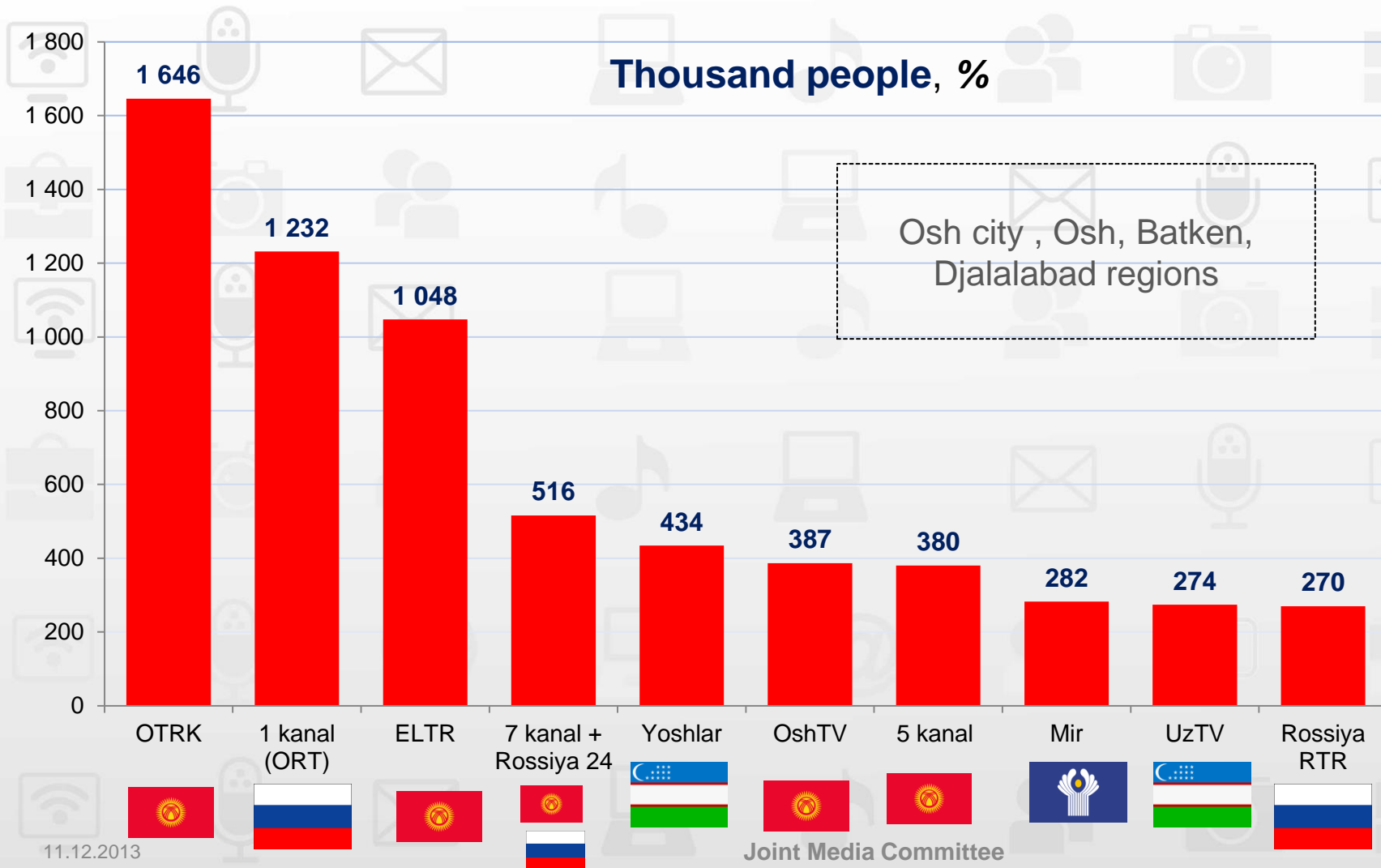
Northern region



11.12.2013

Average Weekly TV Reach

Southern Region



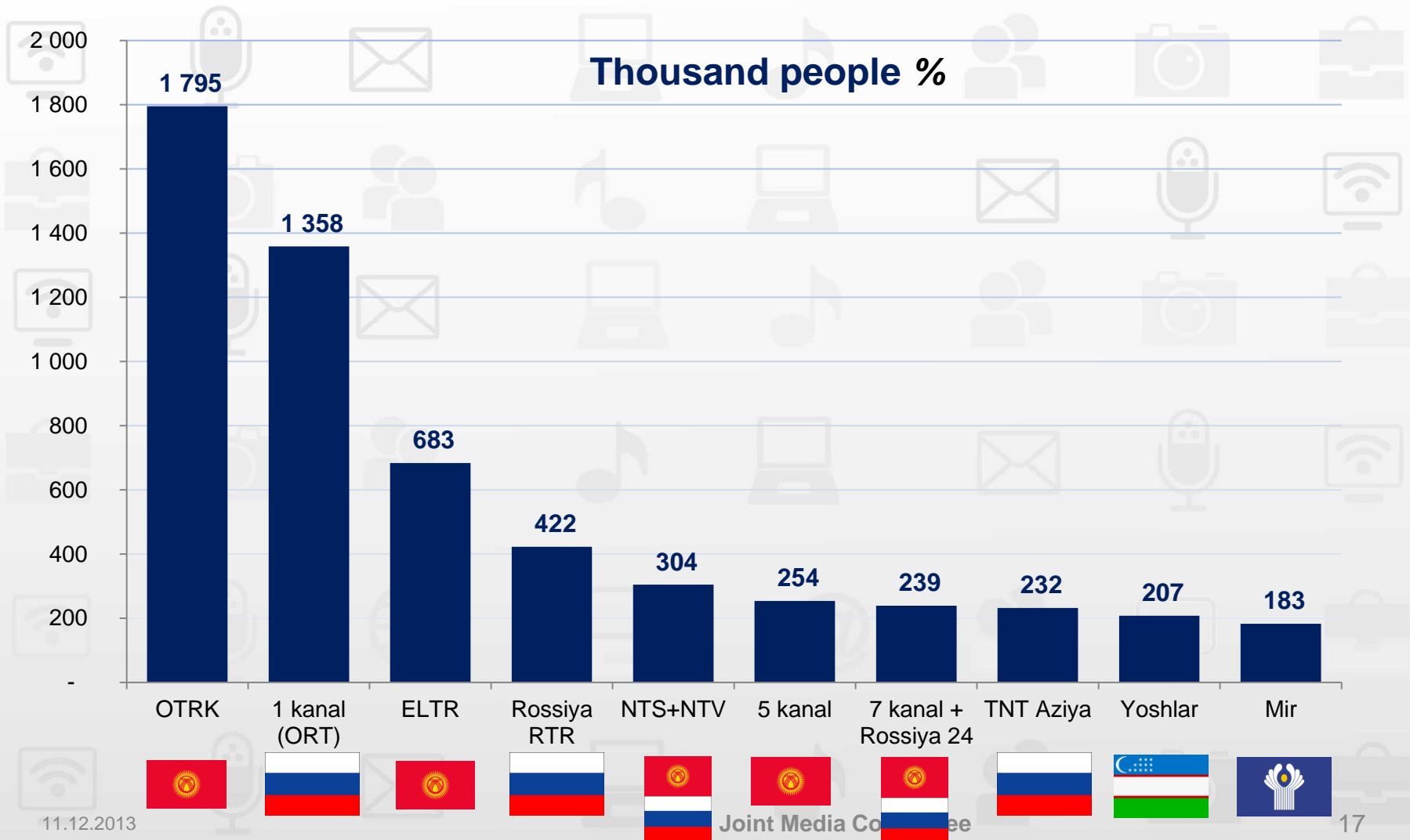


Average daily TV audience/ Average Daily Reach

Average number of viewers, watching TV on a daily basis

Average Daily TV Reach

Kyrgyzstan



Average Daily TV Reach

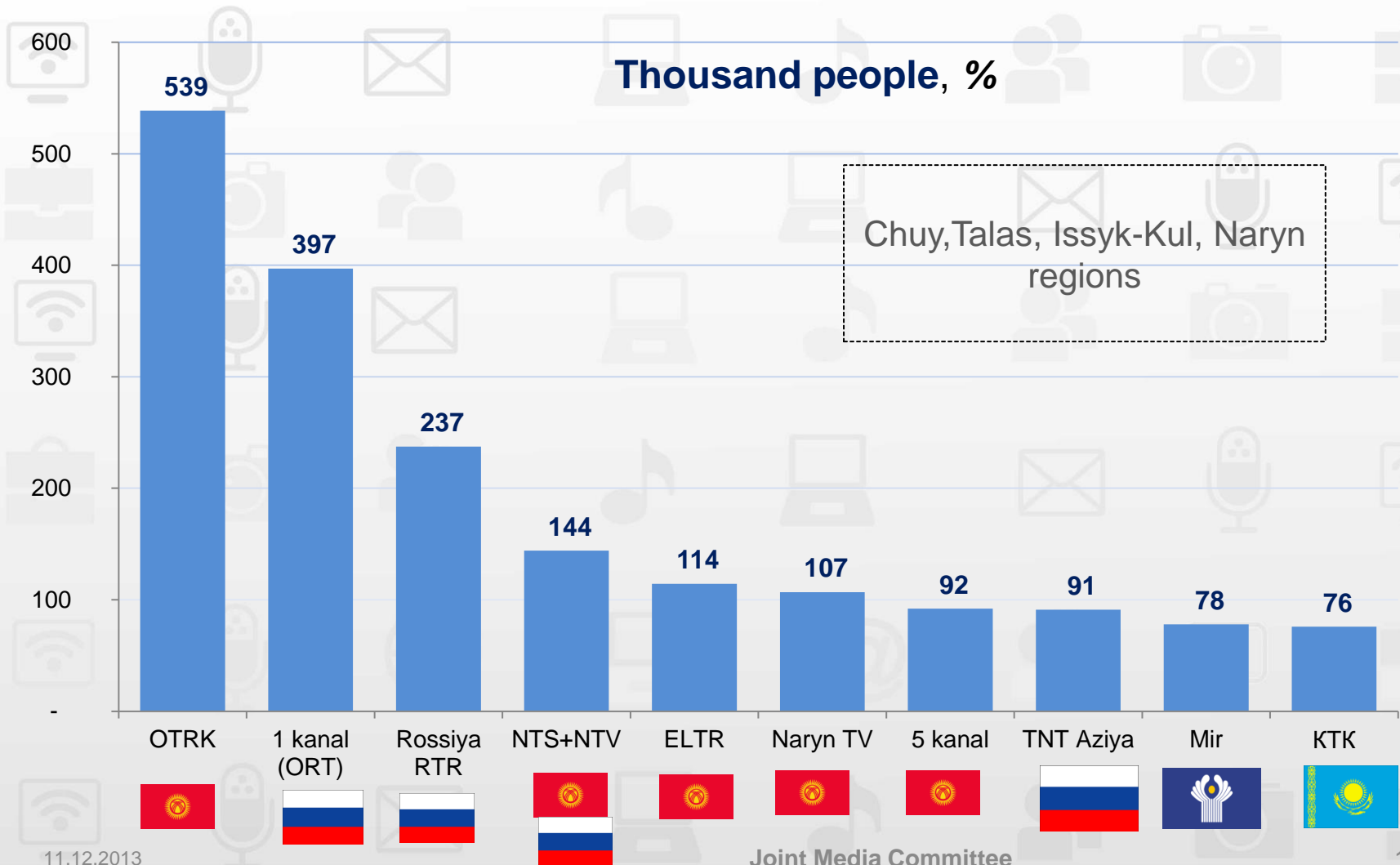
Bishkek

Thousand people, %



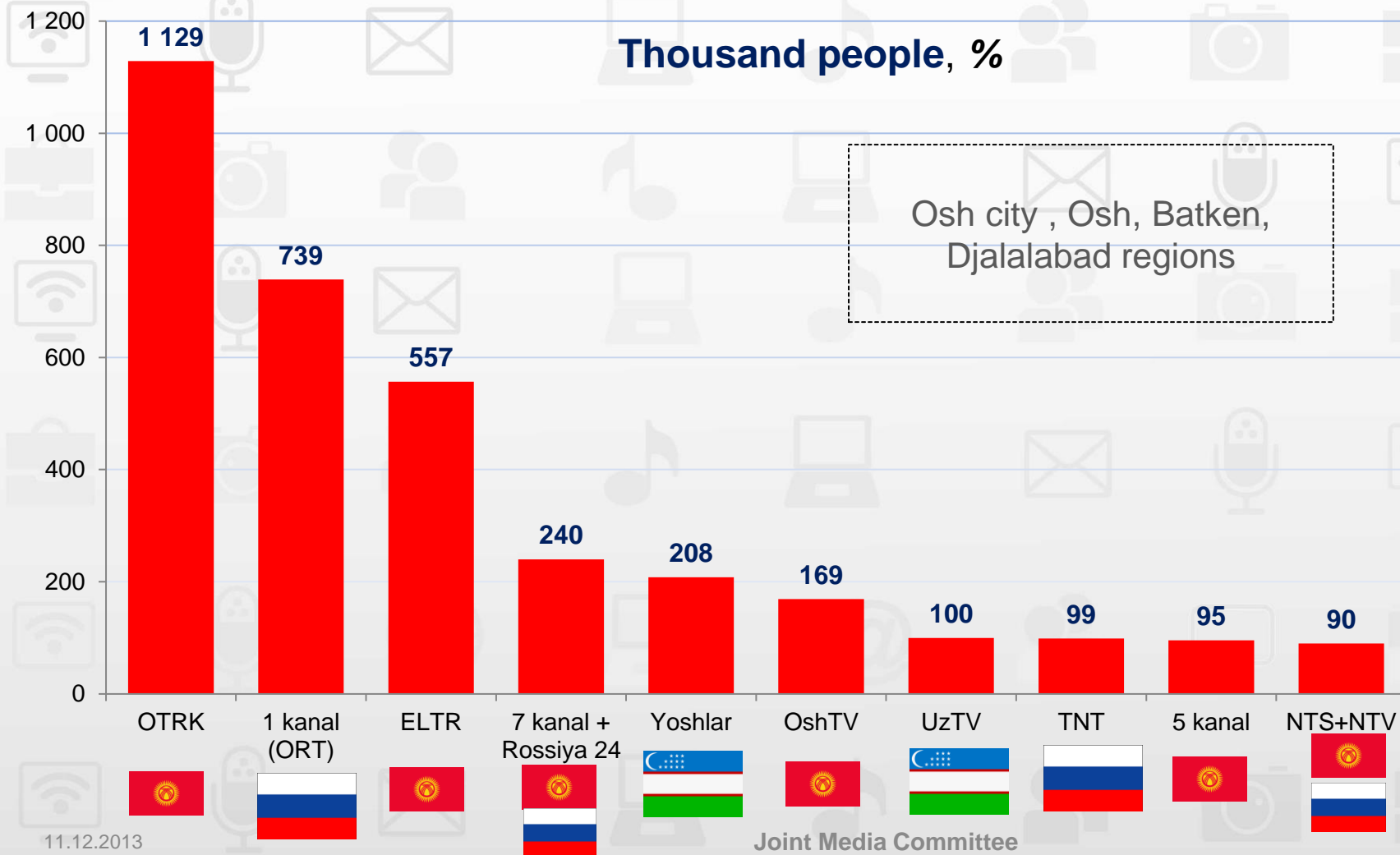
Average Daily TV Reach

Northern region



Average Daily TV Reach

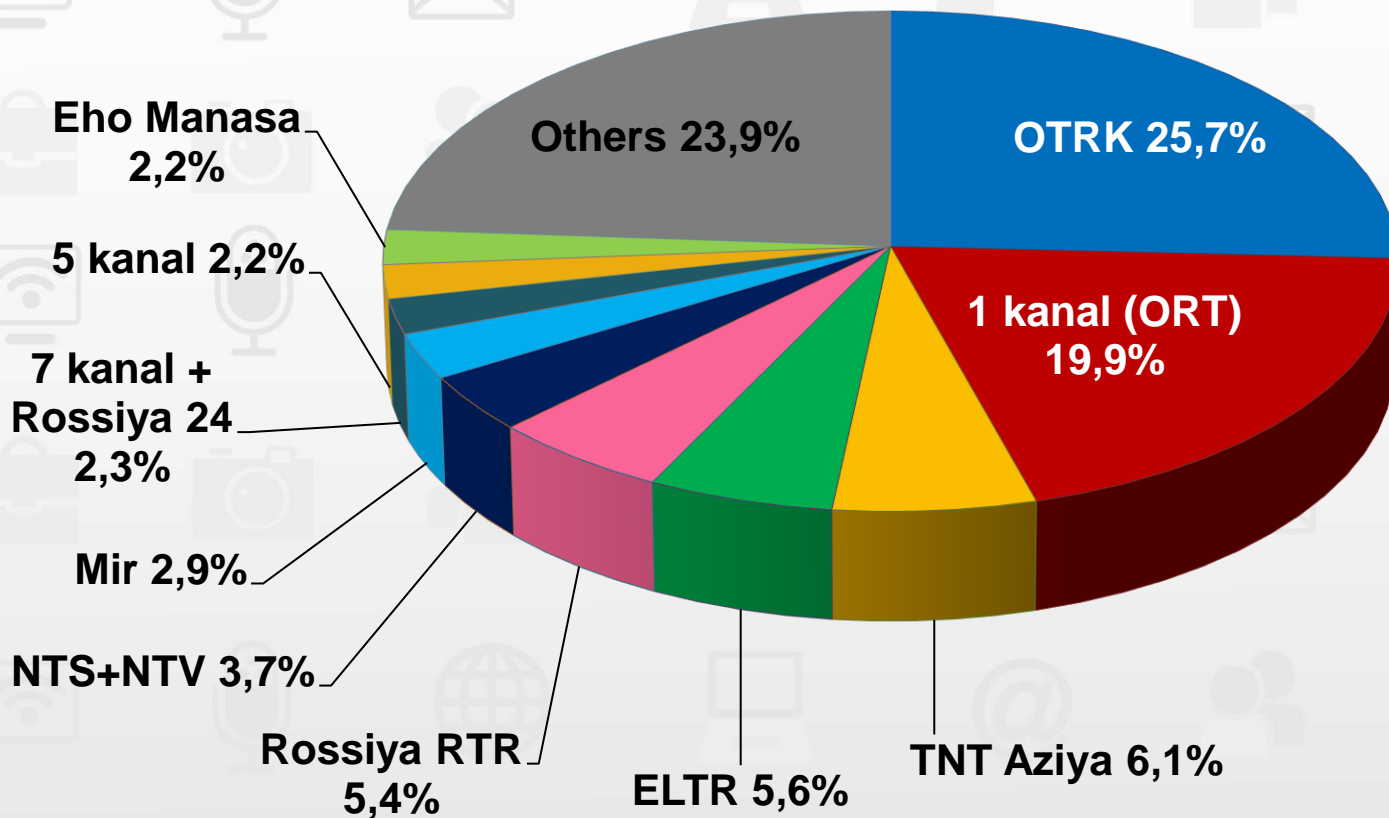
Southern Region



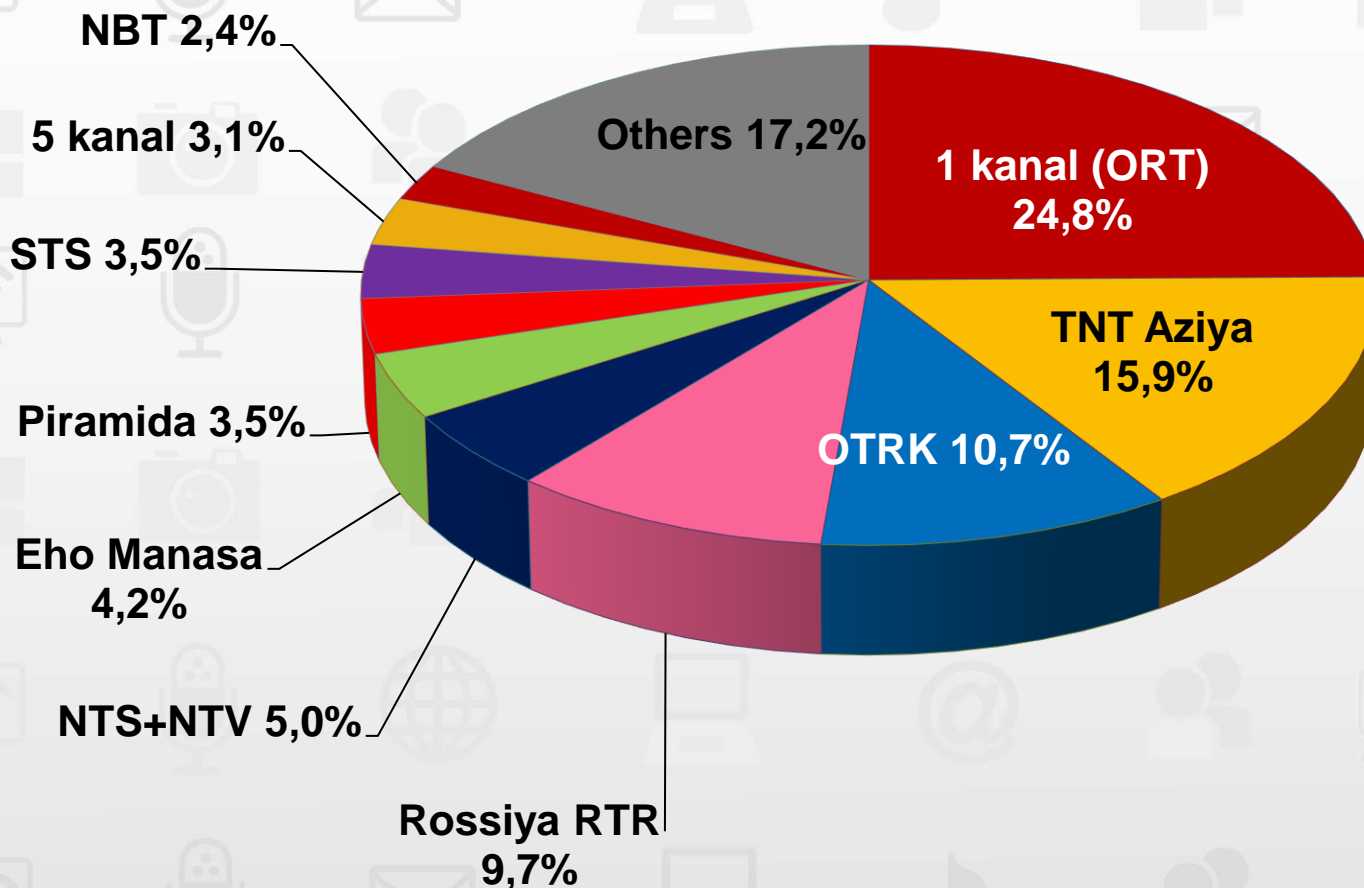


Share of TV Viewing/ Share

Share of Viewing Kyrgyzstan

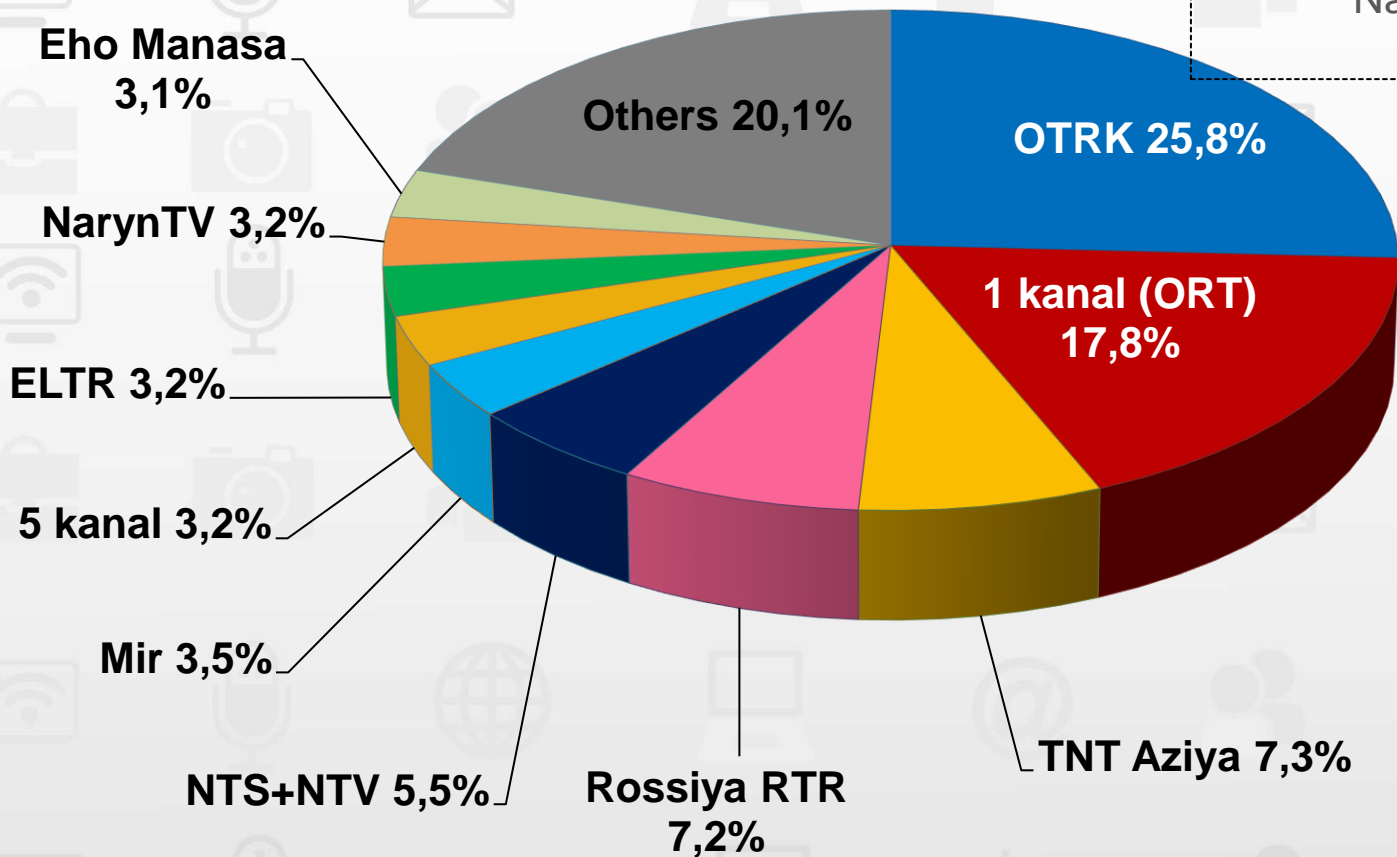


Share of Viewing Bishkek city



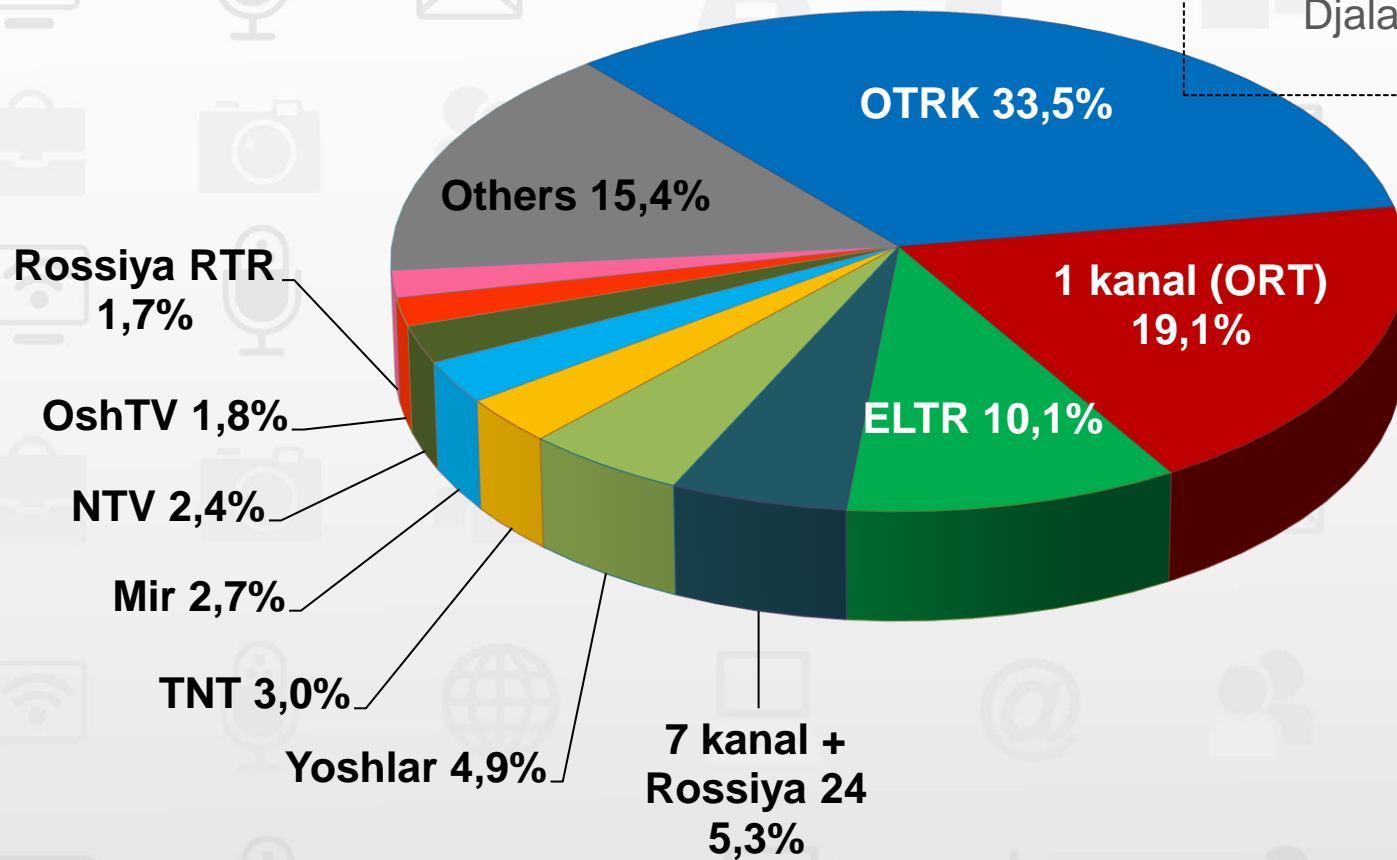
Share of Viewing Northern region

Chuy, Talas, Issyk-Kul,
Naryn regions



Share of Viewing Southern Region

Osh city, Osh, Batken,
Djalalabad regions





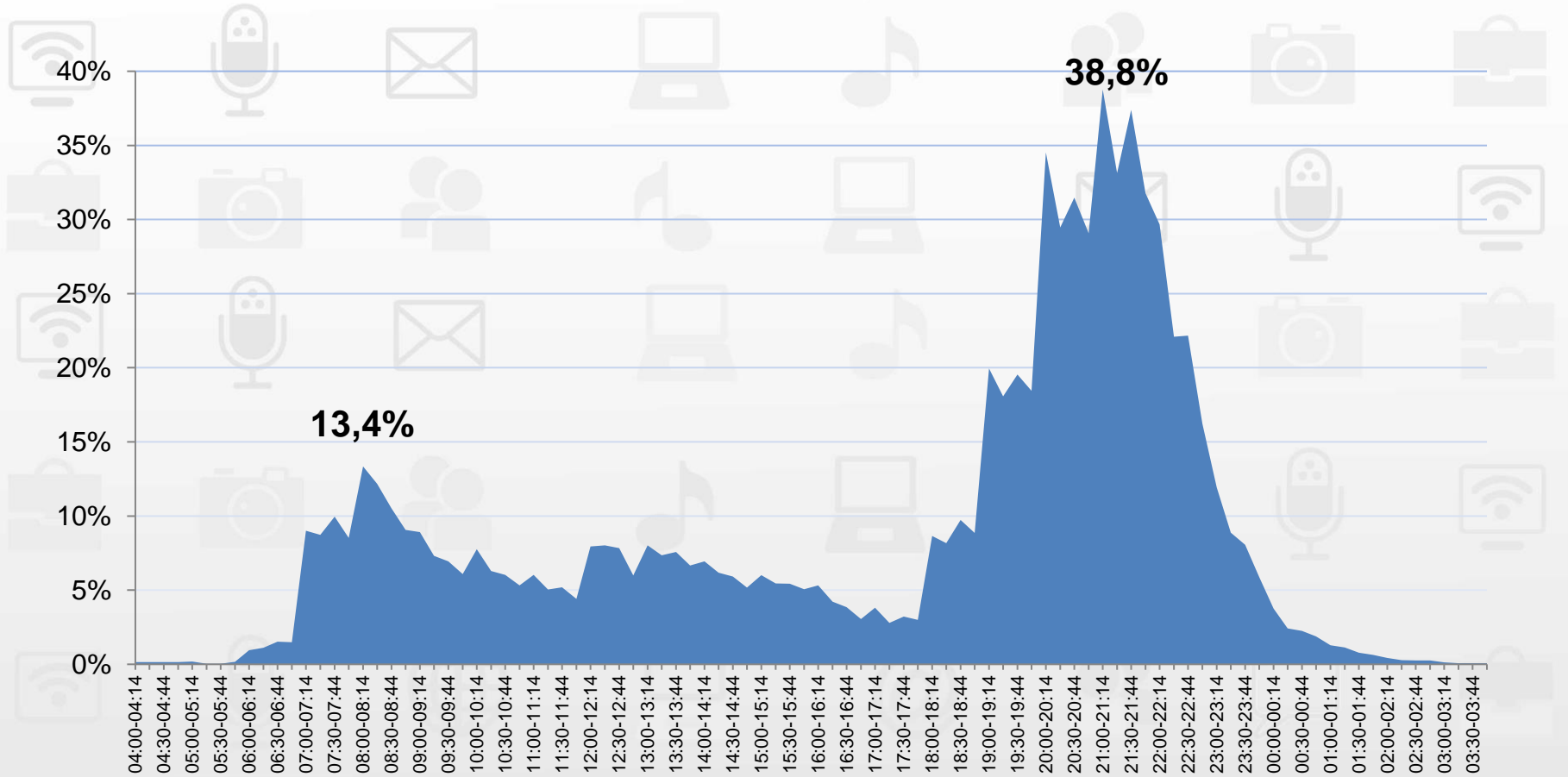
Available TV Audience

TV Ratings

Average number of viewers watching a particular program/TV channel during a particular time interval during the day in %age of the total population.

Available TV Audience

Kyrgyzstan





RADIO

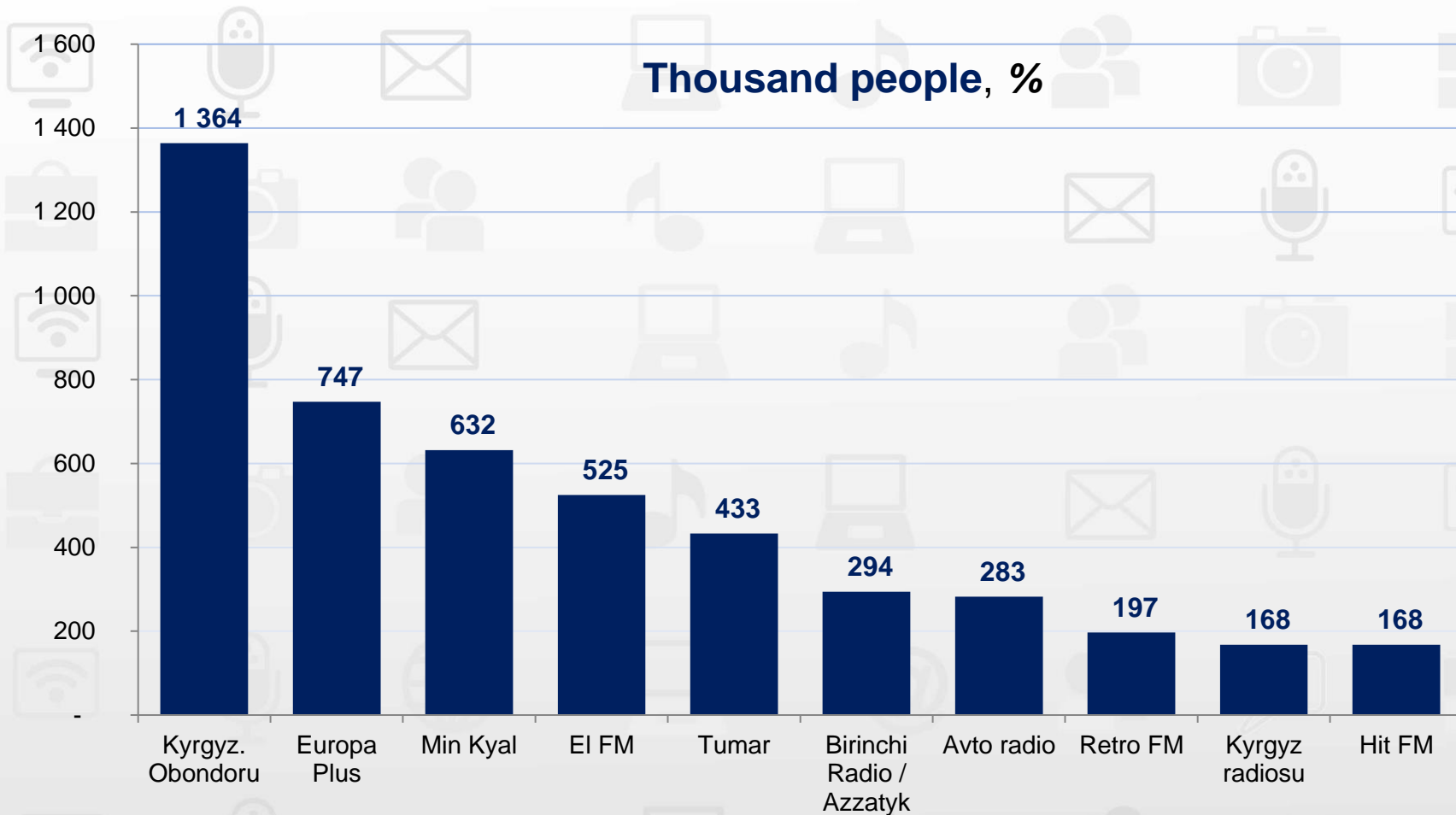


Weekly radio reach / **Weekly Reach**

General number of various listeners, who spent at least 5 minutes tuned on the radio during a 7-day period

Average weekly Radio audience

Kyrgyzstan

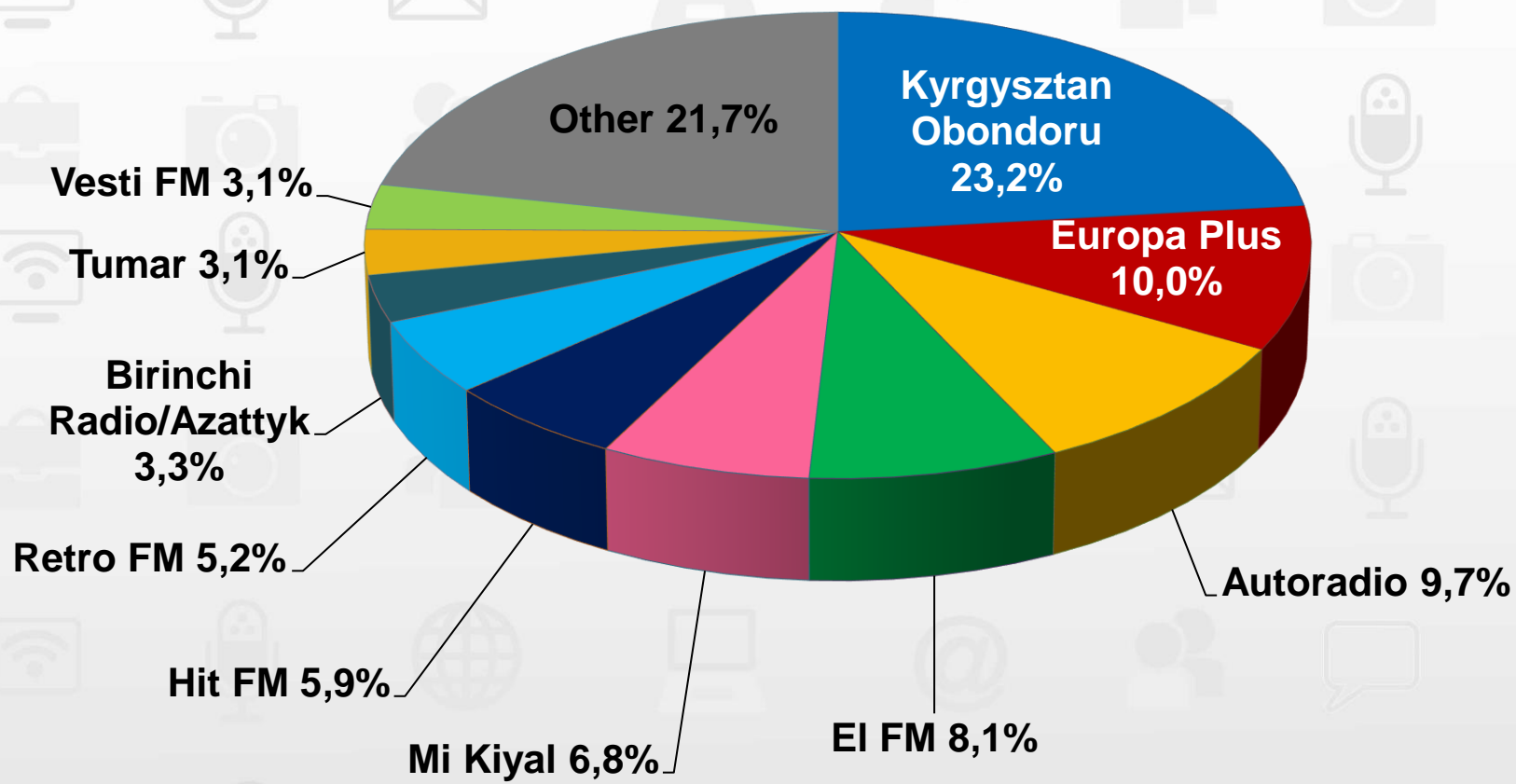




Share of Radio Listenership

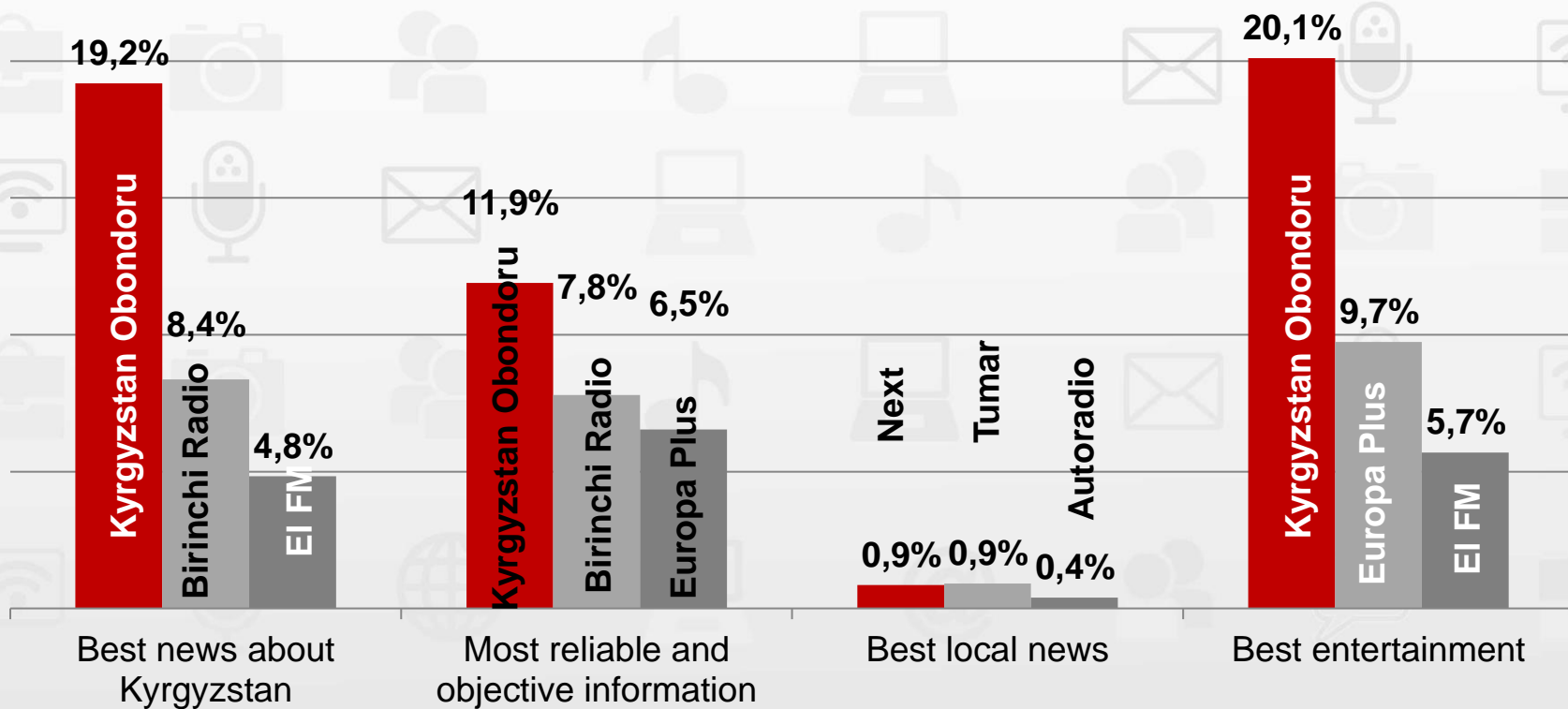
Share of listening

Share of radio listenership Kyrgyzstan



Perceptions about Radio Stations

Kyrgyzstan





INTERNET

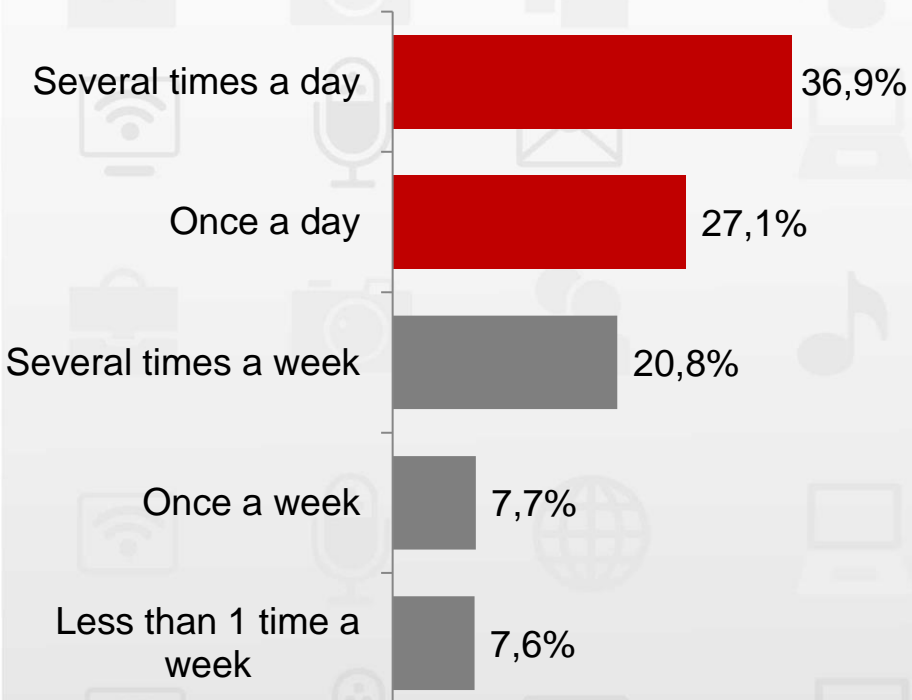
Internet Consumption

Kyrgyzstan

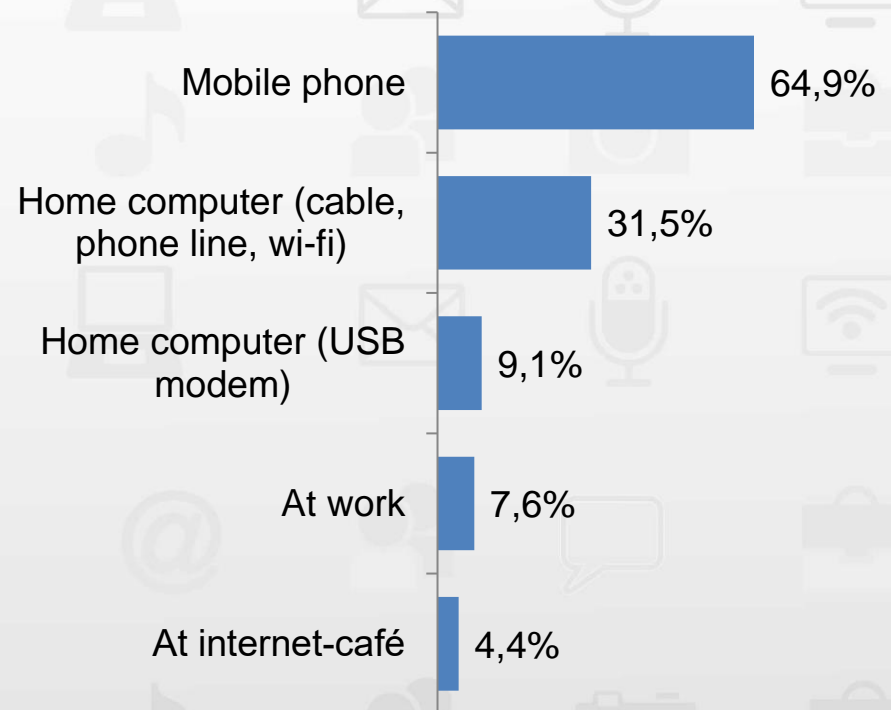


Internet penetration rate in Kyrgyzstan is 36%

Consumption frequency

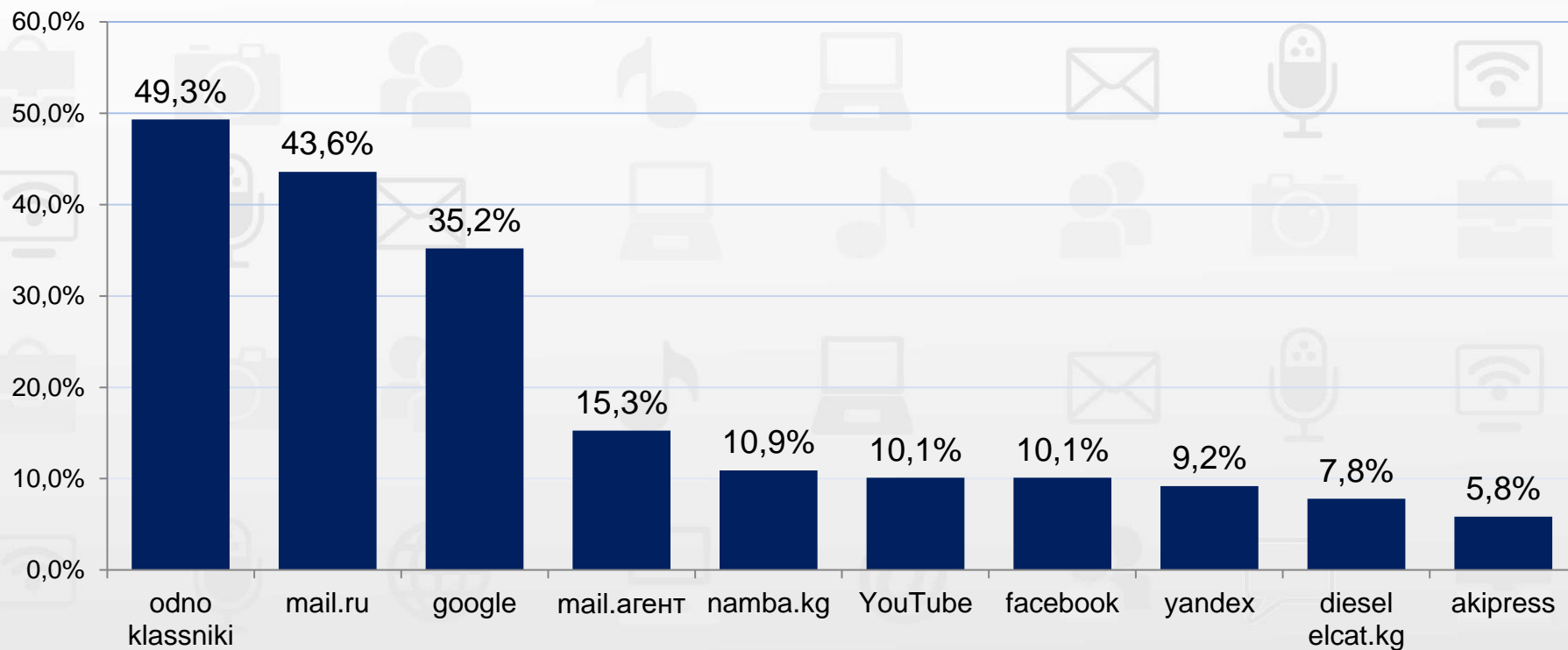


Medium of consumption



Average weekly Internet audience

Kyrgyzstan





LIFE STYLES

Life Style Features

I try to eat healthy	72%
It is worth paying more for quality	58%
I do everything to protect the environment	53%
Watching TV is my main leisure	47%
I am concerned about money	44%
I seek the cheapest prices when shopping	38%
I watch/listen to programs, which my friends tell me about	32%
I like trying new products and brands	31%
I try to buy products of well-known brands	27%
I try to do shopping using promo-campaigns/discounts	25%
I like advertising on TV	23%

Example

Life Style Segments

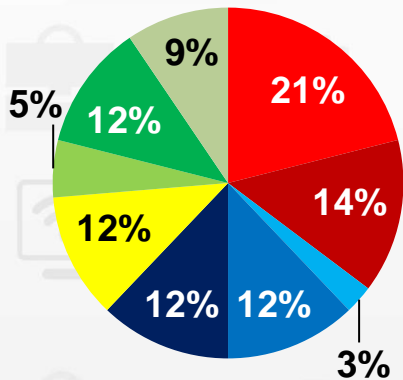


« **Early Adopters** » = people starting to use new products or technologies immediately after they appear on the market

Region

Sex

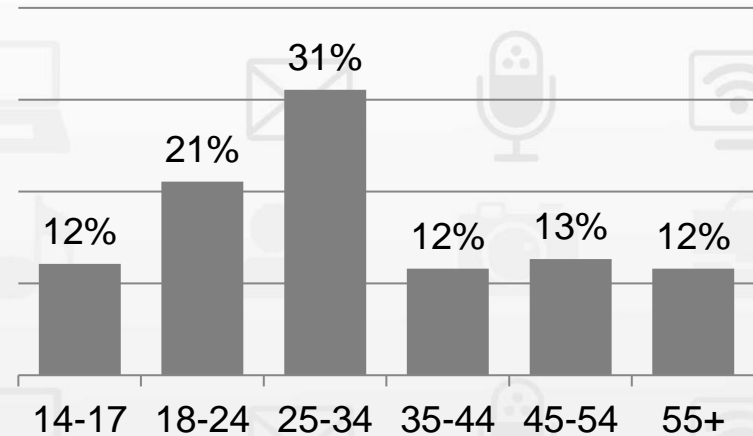
Age



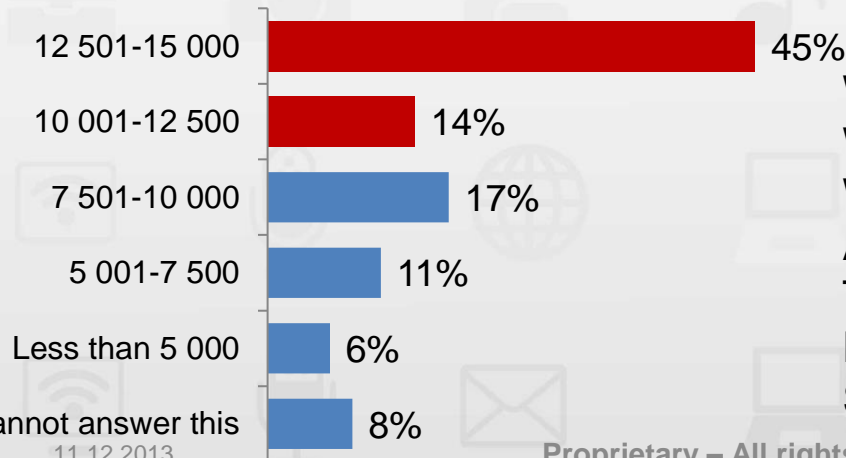
- Bishkek city
- Chui oblast
- Talas oblast
- Issyk-Kul oblast
- Naryn oblast
- Osh city
- Osh oblast
- Jalalabad oblast
- Batken oblast



39% 61%



Income



- Which TV channel do they watch?
- Which Radio stations do they listen to?
- Which programs do they watch/listen to?
- At what time?
- TV and mobile services providers
- Device availability
- Sensitivity to advertising/price/ discounts



TV



RADIO



INTERNET



LIFESTYLE

JOINT MEDIA COMMITTEE

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Joint Media Committee

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