EXECUTIVE SUMMARY - March 2023

Central Asian Media Consumption and Disinformation: a quantitative and qualitative assessment in the context of geo-politics

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| EXECUTIVE SUMMARY |

- The report[1] presents a rapid media consumption assessment in Central Asia. It tells the reader what information - and disinformation - Central Asians consume, as well as the reasons why they consume it. How do recent international and regional geo-political events impact their media choices and what sources do they come from? From the ongoing Russian invasion in Ukraine to controversial domestic events in the region, including violent state response to protests and the unresolved border issues between Kyrgyzstan and Tajikistan, this report examines the critical role of information and disinformation in shaping public awareness and response to such processes.

- The overarching goal of the study is to enrich our understanding of media consumption patterns in the region, with specific attention to disinformation and audiences most susceptible to it: young, elderly, and linguistic minorities. Focus is placed on practical components, including demographic trends both regionally, and across each country, as well as factors like sources, channels, language preferences and new trends in media usage.

- A mixed methodology was applied throughout the study employing quantitative and qualitative data collection. Specifically, computer-assisted telephonic interviews (CATI) and in-depth semi-structured interviews were conducted in Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. Desk research, in turn, covered all five states of the region, including Turkmenistan. The large-scale survey reached out to 2,400 respondents and the qualitative section covered 360 in-depth semi-structured interviews, including 60 with media consumers and 30 with media content producers per country (e.g. journalists and bloggers). The European Neighbourhood Council (ENC) conducted the study with funding from the "Resilience and Engagement with Varied Information for a Vibrant Environment (REVIVE)" project funded by the European Union (EU) and implemented by Internews. The report also provides detailed recommendations for content producers, civil society organisations, governments and major development funders in Central Asia.

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1 EU-funded project "Resilience and Engagement with Varied Information for a Vibrant Environment (REVIVE)".

| QUANTITATIVE FINDINGS |

" the results indicate that there may be a correlation between such factors as income, level of education and area of living with an increased use of Russian language for obtaining the news "

- The survey showed that Russian language is used for media consumption by slightly more than half of the respondents in Central Asia. However, Kazakhstan is the only country where the respondents prefer to obtain news in the Russian language more than in the local language. In Kazakhstan all age groups demonstrated wide use of the Russian language, older respondents tend to use it slightly more. Moreover, the results indicate that there may be a correlation between such factors as income, level of education and area of living with an increased use of Russian language for obtaining the news. For example, in Uzbekistan the percentage of urban respondents using the Russian language for news consumption is around 60% more than that of those in rural areas. In Tajikistan, Russian language preference among respondents with a higher income is 30% higher than those respondents with a lower income. Interestingly, Tajikistan was the only country with a relatively significant use of a minority language for obtaining the news. Uzbeks are the biggest minority in Tajikistan, and, according to the survey results, some of them experience difficulties in accessing the news in their native language. Potentially, this could be used for further research on the topic of minority languages in Central Asia.

- Generally, National TV channels and social media are the key sources of information for respondents in Central Asia. Older respondents overall are more inclined to rely on news from National TV channels, with Russian TV channels as second most popular choice. Younger respondents more likely prefer social media as their major source of information. However, in Kyrgyzstan and Kazakhstan social media supasses the National channels as the top source of news, while in Tajikistan and Uzbekistan National TV channels are substantially more popular than social media. This corresponds with the data on use of the internet for obtaining news, according to which respondents from Tajikistan and Uzbekistan are less reliant on the internet than their counterparts from Kyrgyzstan and Kazakhstan.

" Politics is the most popular topic of news in Kazakhstan and Kyrgyzstan, while respondents in Tajikistan and Uzbekistan are less politicised and more interested in sports news "

- Coupled similarities were found in other sections as well. YouTube is the most popular social network for respondents from Tajikistan and Uzbekistan, while Instagram was a top choice in Kyrgyzstan and Kazakhstan. Politics is the most popular topic of news in Kazakhstan and Kyrgyzstan, while respondents in Tajikistan and Uzbekistan are less politicised and more interested in Sports news. However, in Kazakhstan younger people are less interested in regular news consumption, unlike the older respondents. The opposite trend can be observed in Tajikistan, where younger respondents aged 18-25 are more inclined to obtain news via the internet every day than other age groups.

- According to the survey results, the main device for obtaining news via the internet is a smartphone. The share of people using smartphones is directly correlated to respondents' level of education and monthly income, with people of higher economic status predominantly using smartphones.

- A substantial portion of respondents place their trust in state media, with Uzbekistan standing out as the most trustful towards state media out of the rest of Central Asia. Overall, older respondents demonstrated a higher level of trust for state media along with people from rural areas, as a general trend. Views on non-state media vary in Central Asia. Uzbekistan, for example, has a high level of distrust towards non-state media, but out of all Central Asian countries it has the highest share of respondents who completely trust it. People with lower levels of education are more distrustful towards non-state media. A particular trend was identified in Kazakhstan, where respondents with a Russian language preference in news consumption tend to be more distrustful towards non-state media compared to those with a Kazakh language preference.

- In terms of views on the war in Ukraine, it is still difficult to evaluate the general Central Asian perspective, as this topic in Tajikistan and Uzbekistan is politically sensitive. However, some interesting insights come from Kazakhstan and Kyrgyzstan. Respondents in Kyrgyzstan are slightly more interested in news about Ukraine. However, in Kazakhstan respondents are generally more inclined to put responsibility on Russia for the war in Ukraine. The survey showed that in both Kyrgyzstan and Kazakhstan respondents that watch Russian TV channels are more likely to blame the USA and Ukraine for the war. This finding is even more prevalent amongst older respondents who share these views due to their high consumption rate of Russian media, as the survey confirms. With regards to the most used source of news about the situation in Ukraine, local media is more preferable in both Kazakhstan and Kyrgyzstan. However, respondents within older age brackets are significantly more likely to follow Russian coverage of Ukraine-related news. Younger respondents are far more reliant on local media when it comes to news on the situation in Ukraine.

- An important insight of the survey is that the use of the Russian language in obtaining news is integral to the general news consumption environment in Central Asia. However, while Russian TV channels and other sources originating from Russia play an important part in news consumption, local media and national TV channels are generally more popular. Social media, however, is also one of the central sources of information and news in the surveyed countries. Further research may focus specifically on online content consumption patterns and topics (e.g. lifestyle blogs, migration-themed content, political activism, etc.) and also the use of specific websites, youtube-bloggers, anonymous telegram-channels and other platforms.

| QUALITATIVE FINDINGS |

- The Internet has transformed the media space in Central Asia. The dominance of state-owned TV channels is severely disrupted by the proliferation of alternative sources of news, from social media to bloggers and independent Internet-based news agencies. The drastic rise in smartphone usage and improving Internet penetration are helping the process.

- The growing role of online forms of media had different, and at times, opposing, impact on quality and nature of content production. On the one hand, social media, messengers, and bloggers act as alternatives to the state's political narratives. On the other hand, actors behind spreading disinformation are as active on the Internet as regular content producers. The governments are actively working to beef-up their presence in the online world through social media pages and channels and even maintaining loyal bloggers. Fake news, whatever the sources are, are spreading primarily through the Internet.

- Different categories of population appear to be easy victims of disinformation. Older generations may have difficulties with cross-checking pieces of information due to the lack of relevant technical skills. In turn, younger people are generally apolitical and rarely care to double-check what they consume online. Rural people are also seen to have lower media literacy, making them easier targets of disinformation.

- The ongoing war in Ukraine had a strong impact on raising awareness of the population on information war and political interests behind media information. This is clearly helped by the fact that both Ukrainian and Russian sources reach the Central Asian population in Russian language, thus denying the "language monopoly" of one side of the conflict.

- There is strong evidence for the growing role of local Central Asian languages in media. Partly this is coming in a top-down manner, as the governments work to increase native languages' role in media. Partly, this is coming as a bottom-up process, as the share of Central Asians with fluent Russian is decreasing, especially outside big cities. Yet, content providers in local languages are currently struggling to match the quantity and quality of content in the Russian language.

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" Different categories of population appear to be easy victims of disinformation "

| RECOMMENDATIONS |

Based on the quantitative and qualitative findings, the ENC recommends Central Asian content producers, foreign development agencies and major donors, including the EU and US, as well as for government officials at national and regional levels in the region to:

1. Produce more social media content and online content and publicise ("post") to a higher degree on YouTube and Instagram, followed by TikTok and Facebook. Youtube is a very interesting phenomenon across Central Asia and seems to be used by different groups to the same, or similar, degrees.

2. Produce more social media and online content aimed at the 18-35 age group. The 18-35 age group will be the easiest target, however the 35-55 age group also remains somewhat vulnerable to disinformation and non-independent media sources, which therefore also calls for better media literacy training and independent news.

> " Produce more social media and online content that focuses on international news in non-Russian languages, especially among younger, rural and less educated communities "

3. Produce more social media and online content that focuses on international news in non-Russian languages, especially among younger, rural and less educated communities. This is particularly relevant in the cases of Kazakhstan, Kyrgyzstan and Uzbekistan where the demand is highest.

4. Produce more social media and online content that focuses on international news in Russian languages, especially among younger, urban, and more educated communities. This is particularly relevant in the cases of Kazakhstan, Kyrgyzstan and Uzbekistan where the demand is highest.

5. Produce more, while improving the quality and increasing the trustworthiness of social media and online content in local languages (Tajik, Uzbek, Kazakh, Kyrgyz, as well as smaller minority languages). This is particularly relevant in the case of Kyrgyzstan where demand is high for social media content in the local language.

> " Produce more social media and online content that focuses on Ukrainian current affairs/news in both Russian and local-languages "

6. Produce more social media and online content that focuses on Ukrainian current affairs/news in both Russian and local-languages. This is relevant across all the countries in question and even more so in Kazakhstan and Kyrgyzstan. There is a significant demand for higher-quality analysis in local-language of international events and news.

7. Produce more social media and online content on Instagram for women, while for example blending news content with other topics like celebrity information, entertainment, sports and culture.

8. Increase funding and investment in media and content-production across the whole of Central Asia. The current age-related social media trend clearly indicates that the average Central Asian media consumer is demanding more and better-quality independent news. Increase funding and investment in media/content-production cross-regional media relations and support networks (EU-Balkans-Ukraine-Moldova-Turkey-Caucasus-Central Asia). A national-linguistic identity-revival is observed amongst younger Central Asian media consumers, based on their language choices and media preferences. Support for more interaction between civil society and media actors from across the EU, Balkans, Caucasus, Eastern Europe (Ukraine), Turkey and Central Asia would be useful to increase best practice exchanges among content producers and media actors.

9. Increase funding and investment in real-time surveying and qualitative data-collection on media consumption, including views about the EU, other countries, disinformation, various topics and general news. The dynamism and ripeness of the Central Asian media market calls for higher levels of attention to media consumption and surveying, including both qualitative and quantitative information.

10. Support local languages across the state-media sectors and in terms of language funding for media and others and actively support media organisations and civil society activists in promoting media literacy and countering disinformation.

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