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

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| List of acronyms |

CSOs	Civil Society Organisations
CATI	Computer Assisted Telephone Interview
CL	Confidence Level
EU	European Union
ENC	European Neighbourhood Council
GDPR	General Data Protection Regulation
MoE	Margin of Error
Mbits/s	Megabits per second
NATO	North Atlantic Treaty Organisation
REVIVE	Resilience and Engagement with Varied Information for a Vibrant Environment
RDD	Random-Digit Dialling
DRUID	Reactive User Interface Database
SRS	Simple Random Sampling
UN	United Nations
US	United States
VPN	Virtual Private Network

| Abstract |

This report 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 Russia's war of aggression against 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 (CSOs), governments and major development funders in Central Asia.



“ According to leading experts, this region is in fact over-exposed to disinformation cycles ”

Introduction

The past decade has witnessed a rapid growth of disinformation at the global level. Acknowledging the scale of the challenge, the UN High Commissioner for Human Rights highlighted disinformation as “a symptom of the range of global diseases [...], one of which is systemic inequality”. Central Asia is anything but immune from this trend. According to leading experts, this region is in fact over-exposed to disinformation cycles, due to its heightened strategic relevance as a pivotal geographical area caught between East and West. During a recent ENC policy-maker meeting in the European Parliament it was noted that “fakes, trolls, haters, and social-media-leaks-of-disinformation are relatively new terms that already actively accompany every political event when referring to Central Asia¹”. The aftermath of the Covid-19 pandemic has similarly helped expose the sheer scale of the problem. Recent developments, from Russia’s ongoing war of aggression against Ukraine to controversial domestic events in the region (e.g. violent state response to protests and the unresolved border issues between Kyrgyzstan and Tajikistan) underscore the critical role information – and disinformation – play in shaping public awareness and responses to such processes².

To better understand the present status and key trends in media and disinformation across the region, the ENC, in cooperation with Internews, conducted a rapid media consumption assessment in Central Asia as part of the EU-funded REVIVE project. The study aims 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. The research applied a mixed-methods approach, employing both quantitative and qualitative data collection among general population and expert groups in Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan, including in-depth desk-research covering all countries across the region, including Turkmenistan.

Five specific sub-questions helped clarify the research goals of this study. The first concerns information flows, which examines the primary channels and sources of information, including regarding Russia’s war of aggression against Ukraine and other major local and national events, and how media consumers share such information. The second concerns trust, including how media consumers decide on the trustworthiness

1 European Neighbourhood Council (ENC). (2022, June 30). Yesterday @ENC_Europe & @KASonline hosted the closed-door policy-talk on #China's & #Russia's #Security engagement in #CentralAsia at @Europarl_EN with MEP @gahler_michael Spokesman for Foreign Affairs & MEP @fulviomartuscie Chair of EU-Central Asia Del. [Tweet]. Twitter. https://twitter.com/ENC_Europe/status/1542472397147742208?s=20&t=WSnrKbDm9eSB7giYXvTUQQ

2 Internews. (2021, March 16). Socio-economic Impact of COVID-19 and Media Consumption among Vulnerable Communities in Central Asia. <https://internews.org/resource/socio-economic-impact-covid-19-and-media-consumption-among-vulnerable-communities-central/>

of information. Thirdly, the study also looks at exposure and influence, namely which specific actors are considered most influential as sources of information, as well as specific needs, preferences and challenges of certain socio-economic groups like women, groups of various ages, rural and urban areas, differing income-groups and people with different linguistic preferences. Finally, one important sub-question that this study also tackles is how major events (e.g. Russia's war of aggression against Ukraine, sanctions, violent protests in the region, elections, etc.) have impacted media consumption and disinformation patterns more generally.

Building on research findings, this report proposes a set of detailed recommendations to support policy design, funding priorities and content production. Specifically, the report helps content providers to better address disinformation at its roots and understand its information ecosystem and how certain demographic communities are more susceptible to disinformation and have varied media consumption patterns. It also helps development funders, governments and civil society more broadly navigate the increasingly complex reality of media consumption and disinformation across Central Asia.

“ The report helps content providers to better address disinformation at its roots and understand its information ecosystem ”

The report is structured in the following way. Following the Introduction, the Literature Review section provides a comprehensive discussion of existing publications and studies regarding media consumption across the five Central Asian states. The next section outlines the research methodology, including approaches to the selection of data sources, sampling, and practicalities of data collection in both quantitative and qualitative components. The two main sections of this report are the Quantitative and Qualitative sections, both of which provide findings on media consumption and disinformation across four Central Asian republics and regionally³. The final section includes concluding remarks and tailor-made recommendations for each of the following groups: Central Asian content producers, development agencies, major foreign donors and government officials from the region.

³ Turkmenistan is excluded due to lacking access, information, and local researchers' legal safety. Only desk research is conducted.



Chapter 1 |

Literature Review: media and information in Central Asia

Several studies have recently focused on understanding media consumption in Central Asia. Some specifically focused on online media in the context of radicalization¹, others examined media consumption in the context of Covid-19 pandemic² and looked at hate speech proliferation³. The present study seeks to contribute to this growing body of knowledge with up-to-date data and analysis on media consumption in the wake of extraordinary political events both at international/regional and domestic levels.

This section examines a series of studies conducted or published right after the start of Russia's war of aggression against Ukraine (24 February 2022) and provides a preliminary analysis of general media consumption in Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, and Turkmenistan. It looks at the most significant media consumption studies from across the region in Russian and other languages (English and local languages when available). It also looks at the literature surrounding various communities' needs and susceptibility (vulnerability) to disinformation.

“ While a major part of Kazakhstani state-funded media promotes a more balanced position, the strong presence of Kremlin-sponsored media outlets inside of Kazakhstan is having a significant impact on a substantial part of the population ”

1.1 Kazakhstan

Kazakhstani media reporting on Russia's war of aggression against Ukraine relies on a number of international outlets⁴ ranging from the New York Times to Ukrainian media and Russian opposition outlets. One of the most important factors influencing the public perception of the situation in Ukraine is the sources of information⁵. While a major part of Kazakhstani state-funded media promotes a more balanced position, the strong presence of Kremlin-sponsored media outlets inside of Kazakhstan is having a significant impact on a substantial part of the population.

1 Search for Common Grounds. (2019, August 9). Information flows and radicalization leading to violent extremism in Central Asia. <https://www.sfcg.org/information-flows-and-radicalization-leading-to-violent-extremism-in-central-asia/>

2 Internews. (2021, March 16). Socio-economic Impact of COVID-19 and Media Consumption among Vulnerable Communities in Central Asia. <https://internews.org/resource/socio-economic-impact-covid-19-and-media-consumption-among-vulnerable-communities-central/>

3 Article 19. (2021, March 29). Kyrgyzstan: Report on freedom of expression and 'extremism'. <https://www.article19.org/resources/kyrgyzstan-freedom-of-expression-and-extremism/>; Internews. (2022, January 13). Hate speech in Pre-and Post-election discourse. <https://internews.kg/issledovaniya/finalnoe-issledovanie-yazyk-vrazhdy-v-predvybornom-diskurse/?lang=en>

4 Darimbet, N. (2022, 24 March). Kakie istochniki ispolzuyut kazaxstanskije smi rasskazyvaya o vojne v ukraine ("What sources do the Kazakh media use when talking about the war in Ukraine"). New Reporter. <https://newreporter.org/2022/03/24/kakie-istochniki-ispolzuyut-kazaxstanskije-smi-rasskazyvaya-o-vojne-v-ukraine/>.

5 Trotsenko, P. (2022, 4 May). "Svoj - chuzhoj". Vojna v Ukraine razdelyaet Kazakhstantsev no možno li govorit o raskole? ("Friend or foe". The war in Ukraine divides Kazakhstanis but is it possible to speak of a split?). Radio Azattyk. <https://rus.azattyq.org/a/kazakhstan-how-russia-s-war-in-ukraine-splits-society/31832718.html>

Overall, the majority of the literature shows an increase in Kazakh-language media consumption, despite there still being a large Russian-media sector, particularly among urban consumers.

“ Among those 10% who support the Ukrainian side, 20% are Kazakh-speaking and 6% (three times less) are Russian-speaking respondents ”

A recent study by Demoscope reveals a rather significant discrepancy in the perception of the situation in Ukraine, depending on the language spoken by the citizens of Kazakhstan. Among those 10% who support the Ukrainian side, 20% are Kazakh-speaking and 6% (three times less) are Russian-speaking respondents. A similar gap among Russian supporters is 20% and 45%, respectively⁶. Despite these linguistic trends, the study also shows that a neutral position remains the most predominant tendency amongst media consumers (46%)⁷. Furthermore, there are also regional variations with the media in Northern Kazakhstan focusing and relying more on Russian media due to ethnic-Russian demographic distribution⁸.

The absence of stable internet connection across the country makes it more difficult for Kazakhstanis to access international media news⁹. Such a difference in consumption of information may have caused the divergence of opinions.

1.2 Kyrgyzstan

“ There is also a significant presence of the main Russian television channels ”

According to the study of the International Republican Institute (April 2022), the majority of Kyrgyzstanis receive their information from television. While the percentage went down from 90% in 2019 to 59% in 2022, it is still a substantial majority¹⁰. There is also a significant presence of the main Russian television channels (Channel One Russia and RTR), which are included into the basic package of digital television subscriptions in Kyrgyzstan.

While Russian television channels promote the “Kremlin’s narrative”, local channels tend to report in a more balanced way, according to the member of the Media Oversight Commission Semetei Amanbekov¹¹. At the same time, it should be noted that the court shut down local television

6 Asylbek, B. (2022, 7 April). Opros: “znachitelnaya chast” kazakhstanstsev podverzhena vliyaniyu rossijskoj propagandy Poll: 'Significant part' of Kazakhs exposed to Russian propaganda. Radio Azattyk. <https://rus.azattyq.org/a/31791209.html>

7 Demoscope Bureau of Public Opinion Express Monitoring. (2022, 16 April). Survey “The Russian Invasion of Ukraine”.

<https://demos.kz/category/infographics-en/?lang=en>; <https://demos.kz/scenarij-oprosa/>; Raissova Z. (2022, 20 April). Kazakhstanis and War in Ukraine: People Feel At a Loss about Who’s Right and Who’s Wrong. Central Asian Bureau for Analytical Reporting. <https://cabar.asia/en/kazakhstanis-and-war-in-ukraine-people-feel-at-a-loss-about-who-s-right-and-who-s-wrong>

8 Darimbet, N. (2022, 24 March). Ibid

9 Vajskopf, A. (2022, March 20). Kak gosudarstevisionennye smi Kazahstana osveshhajut vojnu RF protiv Ukrainy (“How state media in Kazakhstan cover Russia’s war against Ukraine”). Deutsche Welle. <https://www.dw.com/ru/kak-gosudarstevisionennye-smi-kazahstana-osveshhajut-voynu-rf-protiv-ukrainy/a-61176127>

10 International Republican Institute. (2019, December). Public Opinion Poll Residents of Kyrgyzstan November 21 - December 3, 2019. Center for Insights in Survey Research. https://www.iri.org/wp-content/uploads/legacy/iri.org/final_kyrgyzstan_slides.pdf; International Republican Institute. (2022, April). National Poll of Kyrgyzstan April 2022. Center for Insights in Survey Research. <https://www.iri.org/resources/national-poll-of-kyrgyzstan-april-2022/>.

11 Tagayev, M. (2022, 25 April). Kak kyrgyzstantsy poluchayut informatsiyu o vojne v Ukraine? (How do Kyrgyzstanis get information about the war in Ukraine?). Radio Azattyk. <https://rus.azattyk.org/a/31820539.html>.

station NEXT, which reported about its social networks on the alleged agreement concerning the provision of military assistance by Kyrgyzstan to Russia during the "special operation" on the territory of Ukraine¹².

Another important trend in Kyrgyzstan is the growing popularity of the Internet. According to the national poll, 72% of the respondents use the Internet for consuming news, giving their preference to WhatsApp (79%), Instagram (68%) and Facebook (45%) in terms of messenger and social media services¹³. However, while two Russian television channels remain popular for consuming news, the popularity of the Kyrgyz blogosphere, which has been more shaped by pro-Ukrainian narratives and actors, is growing¹⁴.

1.3 Tajikistan

According to the poll conducted by Social Research Centre "Zerkalo" ("Mirror") and Mashvarati Rasonai ("Media Consulting") (February 2022), television largely remains the main source of information for a whopping 96% of the population¹⁵. Among 2,500 respondents, 92% of respondents rely on Tajik television channels, 32% on Russian channels, 27.4% on Uzbek channels and 24.95% on Iranian television channels. The most popular television channels are government-owned and mostly Tajik-language, including television 'Safina' (63%) and 'Tojikiston' (59%). By February 2022, Russian networks ORT and NTV fell to 3rd and 5th places in terms of popularity¹⁶.

“ In Tajikistan, there is also a growing popularity of internet usage for media. According to a 2022 poll, 30% of population consults online media ”

In Tajikistan, there is also a growing popularity of internet usage for media. According to a 2022 poll, 30% of population consults online media sources¹⁷. YouTube, Facebook, and Instagram are named among the most visited social platforms, while Russia-based platform OK.ru (among the leading platforms in previous polls from 2018 and 2019) dropped down from 2nd place to 5th place¹⁸.

1.4 Turkmenistan

Given the closed nature of Turkmen society, high levels of state control, and the sensitivities related to media consumption, there has been almost

¹² Ibid

¹³ International Republican Institute. (2022, April). National Poll of Kyrgyzstan April 2022. Center for Insights in Survey Research. <https://www.iri.org/resources/national-poll-of-kyrgyzstan-april-2022/>.

¹⁴ Tagayev, M. (2022, 25 April). Kak kyrgyzstantsy poluchayut informatsiyu o vojne v Ukraine? (How do Kyrgyzstanis get information about the war in Ukraine?). Radio Azattyk. <https://rus.azattyk.org/a/31820539.html>.

¹⁵ Mashvarati Rasonai (Media Consulting) and Zerkalo (Mirror). (2022, February). Media preferences of the population of the Republic of Tajikistan: television, radio, print media, websites, social networks and instant messengers - 2022. <http://z-analytics.tj/news/93-issledovatelyi-opredelili-mediapredpochteniya-naseleniya-rt.html>.

¹⁶ Mashvarati Rasonai (Media Consulting) and Zerkalo (Mirror). (2022, February). Media preferences of the population of the Republic of Tajikistan: television, radio, print media, websites, social networks and instant messengers - 2022. <http://z-analytics.tj/news/93-issledovatelyi-opredelili-mediapredpochteniya-naseleniya-rt.html>.

¹⁷ Yusufi, B. & Yusufi, M. (2022, 7 June). Tajiks Watching Less Russian television, But Its News Still Shapes Public Opinion. Radio Free Europe. <https://www.rferl.org/a/tajikistan-russian-television-news-public-opinion/31887824.html>.

¹⁸ Zerkalo Analytics Group (2022, June). Issledovatelyi opredelili mediapredpochteniya naseleniya RT ("Researchers identified the media preferences of the population of the republic of Tajikistan"). <http://z-analytics.tj/news/93-issledovatelyi-opredelili-mediapredpochteniya-naseleniya-rt.html>.

“ In 2022, Turkmenistan scored 25 out of 100 in media freedom and was ranked as the 3rd least free media environment globally (177 out of 180) only above Iran, Eritrea and North Korea ”

no research or public opinion polls conducted on media consumption in Turkmenistan. The present analysis has been drawn on the basis of desk research of various open sources and a series of target-anonymized interviews with experts from Turkmenistan about media consumption. Turkmenistan’s literature review is substantially longer than the previous country-sections, due to the fact that Turkmenistan is the only of the five Central Asian republics in which this study was not capable of conducting qualitative and quantitative data collection.

Media landscape “super-controlled freedom”

The media landscape in Turkmenistan is a combination of full internal control over all news production with some limited “free leverage space” for a number of foreign media outlets. In 2022, Turkmenistan scored 25 out of 100 in media freedom and was ranked as the 3rd least free media environment globally (177 out of 180) only above Iran, Eritrea and North Korea¹⁹. The freedom of civil liberties and political rights of the country is assessed as “not free” (2 out of 100) with a tight control over newspapers, radio, television and the internet by the state²⁰. However, in this landscape, some foreign media outlets, including BBC, CNN, Al Jazeera, Euronews, and some Russian television channels are allowed to broadcast freely.

Newspapers and online news outlets

The majority of newspapers in the country are state-owned: Turkmenistan Today (TDH), the national newspaper Turkmenistan, and the Russian-language medium Neytralny Turkmenistan (Neutral Turkmenistan). These newspapers (all available online) together with main news-aggregators, like Turkmenportal, Salamnews and several magazines²¹, reproduce government policies and narratives to a very high level and synchronised degree.

There are also independent or opposition online news outlets, such as Arzuw News, Business Turkmenistan, Infoabad, as well as foreign-based media Turkmen.news, Chronicles of Turkmenistan, Turkmen Yurt television, and Gundogar²². However, access to these sources is continuously blocked by the state-run monopoly internet service provider Turkmentelecom²³.

19 Reporters Without Borders. (2022). Global score index. Turkmenistan. <https://rsf.org/en/index>; Cabar. (2022). Central Asia: Lack of Freedom. https://longreads.cabar.asia/lack_of_media_freedom_en

20 Freedom House. (2023). Freedom in the world 2022 index. Turkmenistan. <https://freedomhouse.org/country/turkmenistan/freedom-world/2022>.

21 E.g. Altyn Asyr Ykdysadyýeti (Turkmen: The Golden Age Economy), a monthly magazine issued by the Ministry of Economy and Development of Turkmenistan.

22 Reporters Without Borders. (2022). <https://rsf.org/en/country/turkmenistan>; IPHR. (2022, Nov.). Briefing paper for EU-Turkmenistan Human Rights Dialogue: Key human rights concerns in Turkmenistan. <https://www.iphronline.org/wp-content/uploads/2022/11/IPHR-TIHR-briefing-paper-on-Turkmenistan-November-2022.pdf>.

23 IPHR. (2022, Nov.). Briefing paper for EU-Turkmenistan Human Rights Dialogue: Key human rights concerns in Turkmenistan. <https://www.iphronline.org/wp-content/uploads/2022/11/IPHR-TIHR-briefing-paper-on-Turkmenistan-November-2022.pdf>; IPHR. (2022, November 22). Turkmenistan: Human rights groups highlight key issues for EU dialogue. <https://www.iphronline.org/turkmenistan-human-rights-groups-highlight-key-issues-for-eu-dialogue.html>.

“ Despite heavy censorship, a noticeable number of international television and radio channels are allowed to broadcast in the country ”

“ Russian, Turkmen, and Turkish television channels are named among the most popular, while European or Western ones are consumed by only 1% of the population ”

Television channels

All televised broadcast media are subject to heavy censorship in Turkmenistan²⁴. Despite heavy censorship, a noticeable number of international television and radio channels are allowed to broadcast in the country, for example, central Russian television channels, such as Rossiya24, Pervyy kanal, RTR, as well as some international media, such as BBC, CNN, Al Jazeera, and Euronews²⁵. Unlike the national television stations, the foreign channels are only accessible through cable, IP-subscription, or with the help of satellite. Foreign satellite television channels remain the main source of information about the outside world for the Turkmen audience²⁶. Although the government does not block them, it still tries to limit their audience by introducing more restrictions and banning satellite receivers in the countryside²⁷. Russian, Turkmen, and Turkish television channels are named among the most popular, while European or Western ones are consumed by only 1% of the population.²⁸

Access to the Internet

The use of the internet and social media networks equally face severe restrictions in Turkmenistan. According to a law adopted in 2014, the state provides universal and equal access to the Internet for the entirety of the population²⁹. In practice, however, Turkmenistan features one of the lowest internet penetration rates in the world (ranking 220 out of 220³⁰), while the access to the Internet is generally blocked, with exception of some “holes” in the form of state websites such as Turkmenportal and Salamnews.

With the introduction of a new government cybersecurity service in September 2019, the use of virtual private networks (VPNs), which help the population access blocked online resources, also became illegal. As a result, VPN providers and private users risk a fine, intimidation and prosecution³¹. Despite such restrictions, several interview sources note that

24 Freedom House. (2023). Freedom in the world 2022 index. Turkmenistan. <https://freedomhouse.org/country/turkmenistan/freedom-world/2022>.

25 Interview with an anonymous source residing in Turkmenistan (2022, November).

26 Obob.television. (2022, July 16). V Turkmenistan neskolko dney blokirovali sayty rossiyskih telekanalov i gos. informagentstelevision. (“In Turkmenistan, the websites of Russian television channels and government news agencies were blocked for several days”). <https://obob.television/sobytiya/v-turkmenistane-neskolko-dney-bloki/>

27 Freedom House. (2023). Freedom in the world 2022 index. Turkmenistan. <https://freedomhouse.org/country/turkmenistan/freedom-world/2022>.

28 According to the survey conducted in February - May 2022 in Turkmenistan (anonymized source), the most popular television channels are:

Russian Channels (Rossiya24, Pervyy kanal, Rentelevision, television3, Domashniy, Subbota, STS, TNT, Ntelevision, Pyatnitsa) – 36%

Turkmen Channels (Altyn Asyr, Yashlyk, Miras, Turkmen Owaz) – 12%

Turkish channels (Turksat, Kanal-D, 7-kanal, ATV, Show television) – 8%

European and other channels (BBC, Euronews, Bloomberg, The Guardian, Al Jazeera and CNN) are less than 1%.

29 Parahat.info. (2014, December 29). Law of Turkmenistan on legal regulation of the development of the Internet and the provision of Internet services in Turkmenistan. <https://www.parahat.info/law/2014-12-29-zakon-turkmenistana-o-pravovom-regulirovanii-razvitiya-seti-internet-i-okazaniya-internet-uslug-v-turkmenistane>.

30 Cable.co.uk. (2022, June). Worldwide broadband speed league 2022. <https://www.cable.co.uk/broadband/speed/worldwide-speed-league/>

31 Alinov V. (2021, March). Turkmenistan launches national messaging services. Novastan.org. <https://novastan.org/en/turkmenistan/turkmenistan-launches-national-messaging-services/>; Turkmen-news. (2022, October 20). 2,5 milliarda zablokirovannyh IP. Turkmenistan ostaetsya

“ The Turkmen landline-internet connection remains the slowest, most expensive and socio-economically exclusionary access in the world ”

“ Statistically, there are 2.35 million internet users (38% of the population) and 4.92 million cellular mobile users (80% of the population) in Turkmenistan ”

the population still occasionally access some foreign media outlets and social networks through mobile internet.³²

The Turkmen landline-internet connection remains the slowest, most expensive and socio-economically exclusionary access in the world³³. The most affordable tariff with a speed of 256 Kbps costs 100 manats (27€/m). This sum does not guarantee high speed and consistency of access. According to Speedtest's measurements, the country ranks 175 (out of 175) for the speed of fixed internet lines, with only 2.45 megabits per second (Mbit/s) in download, compared to 45 Mbit/s in Kazakhstan and 75 Mbit/s in Russia³⁴.

The mobile internet in Turkmenistan is financially more accessible. One of the most popular tariff plans, Sowgat 500, offers 150MB of internet for 4.3€/month³⁵. For a tariff with 2GB, one is forced to pay 13.6€/m. The internet is also available through internet cafes, but the access remains expensive (1.88 €/h which is quite a high price for a country with an average salary of about 190€³⁶).

After expelling the country's last foreign mobile services provider, the government established full control over the mobile internet connection with the help of the sole mobile operator Altyn Asyr³⁷. It also limited access to online platforms where freedom of speech and expression was possible. As a result, most popular social networks (Facebook, Twitter, YouTube), messaging services (Messenger, Telegram), and also IT development sites like Github are theoretically inaccessible in Turkmenistan³⁸. The only messaging service still legally tolerated in the country is IMO (a subsidiary of the Chinese company Joyy).³⁹

na poslednem meste v mire po skorosti interneta (“2.5 billion blocked IPs. Turkmenistan remains in last place in the world in terms of Internet speed”). <https://turkmen.news/25-milliarda-zablokirovannyh-ip-turkmenistan-ostaetsya-na-poslednem-meste-v-mire-po-skorosti-interneta/>; Radio Azalyk. (2022, November 15). Vlasti Turkeminstant prodolzhat borbu s VPN. (“Turkmenistan authorities continue restrictions on VPN”). <https://rus.azathabar.com/a/32132024.html>.

32 Interview with an anonymous source residing in Turkmenistan. (2022, November).

33 Freedom House. (2023). Freedom in the world 2022 index. Turkmenistan. <https://freedomhouse.org/country/turkmenistan/freedom-world/2022>.

34 Speedtest Global Index. (2022, November). Turkmenistan Median Country Speeds. <https://www.speedtest.net/global-index/turkmenistan#fixed>.

35 TM Cell. (2023, January 8). Mobile Connection. Tariff. <https://www.tmccll.tm/MobileConnection/Tariff/Sowgat500>.

36 Onliner. (2021, March 25). 100 Mbit/s za \$35 tysyach i poslednee mesto v mire. Kak kontroliruyut internet v Turkmenistane. (“100 Mbps for \$35 thousand and the last place in the world. How the Internet is controlled in Turkmenistan”). <https://tech.onliner.by/2021/03/25/kontrol-interneta-v-turkmenistane>.

37 Onliner. (2021, March 25). 100 Mbit/s za \$35 tysyach i poslednee mesto v mire. Kak kontroliruyut internet v Turkmenistane. (“100 Mbps for \$35 thousand and the last place in the world. How the Internet is controlled in Turkmenistan”). <https://tech.onliner.by/2021/03/25/kontrol-interneta-v-turkmenistane>.

38 Kiparoidze, M. (2020, November 25). Coming soon: Turkmenistan's government-backed email and messaging app. .Coda. <https://www.codastory.com/authoritarian-tech/turkmenistan-messaging-app/>; Alinov V. (2021, March). Turkmenistan launches national messaging services. Novastan.org. <https://novastan.org/en/turkmenistan/turkmenistan-launches-national-messaging-services/>;

39 Alinov V. (2021, March). Ibid.

Social media sources

Statistically, there are 2.35 million internet users (38% of the population) and 4.92 million cellular mobile users (80% of the population) in Turkmenistan and this number is increasing⁴⁰. The number of social media users in 2022 amounts to 338.000 (5.5% of the population), of which 308.400 use Instagram (5% of the population), 35.000 use LinkedIn (0.6% of the population), and 20.500 use Facebook (0.3% of the population).⁴¹

Media consumption pattern

The mass media landscape in Turkmenistan makes for a mixed media consumption pattern within a context of a highly state-controlled Turkmen society. According to recent figures, 70% of Turkmen respondents use the internet as a main source of information, and 45% still choose television as the most preferred source⁴². However, due to the restricted nature of the country in conducting polling and retrieving reliable data, such figures should be examined with a degree of uncertainty.

Despite a significant presence of eight television (national) channels and four radio (national) stations, Russian television channels remain most popular among Turkmen audiences. According to the results of a survey from February 2022, 36% of the respondents prefer watching Russian channels, followed by Turkmen media (12%) and Turkish media (8%). The share of viewing of European television stations is less than 1%. According to the anonymous interview sources, one of the explanations of the popularity of the Russian television channels is their broad coverage of international events in contrast with national stations, which mainly cover local news. With regards to Turkish channels, there is also a variance in consumption. Turkish channels are very popular, but they mainly provide entertainment content. There is also access to some Uzbek and Tajik television channels but their popularity is difficult to identify.⁴³

“ According to a local anonymous source, due to the serious presence of Russian television news content, many Turkmen residents keep up with the Russian version of events in Ukraine ”

Russia's war of aggression against Ukraine

Due to the closed nature of the country, it is almost impossible to quantitatively examine how the locals relate to Russia's war of aggression against Ukraine⁴⁴. The national media in Turkmenistan simply ignore the war in Ukraine, especially when compared to other Central Asian countries, where media is pressed to provide more diverse and “neutral” coverage⁴⁵.

40 Datareportal. (2022, February 16). Digital 2022: Turkmenistan. <https://datareportal.com/reports/digital-2022-turkmenistan>; Cable.co.uk. (2022, June). Worldwide broadband speed league 2022. <https://www.cable.co.uk/broadband/speed/worldwide-speed-league/#speed>; Turkmentelecom. (2023, January). Tariffs for unlimited Internet in the city. <https://telecom.tm/en/internet/>

41 Datareportal. (2022, February 16). Digital 2022: Turkmenistan. <https://datareportal.com/reports/digital-2022-turkmenistan>.

42 Anonymized survey (2022, February-May).

43 Anonymized survey (2022, February-May); Interview with an anonymous source residing in Turkmenistan (2022, November).

44 Ryskulova, N. (2022, 7 May). Bez bukvy Z i antivojennykh mitingov. Kak strany Tsentralnoj Azii pytayutsya vyderzhat nejtralitet v vojne. (“Without the letter Z and anti-war rallies. How the countries of Central Asia are trying to maintain neutrality in the war”). BBC news. <https://www.bbc.com/russian/features-61359208>.

45 Reporters Without Borders. (2022). Europe - Central Asia. Polarisation to the West, war & propaganda to the East. <https://rsf.org/en/classement/2022/europe-central-asia>.

According to a local anonymous source, due to the serious presence of Russian television news content, many Turkmen residents keep up with the Russian version of events in Ukraine, starting already from the events in 2014. However, after the Russian invasion of Ukraine in February 2022, there has been a significant increase of scepticism with regards to Russian media among the broader audience in Turkmenistan.

Until July 2022 Russian internet portals were the last to not be blocked by the Turkmen authorities. However, in the summer 2022, open access to TASS, RIA Novosti, InoSmi and their mobile applications was blocked. Shortly before this, Azerbaijani, Kazakhstani and Kyrgyzstani news sites were also blocked, which almost completely limited the flow of news to Turkmenistan from abroad. The access was soon restored and was interpreted as a trial cut-off for future potential needs.⁴⁶

Language

Statistically, 82% of the population of Turkmenistan do not know Russian, and 18% speak Russian to varying degrees, largely representing the older generation that grew up in the late Soviet era.⁴⁷ The Russian language is still very popular among the middle age population in Turkmenistan, however, the younger generation born after the 1990s have a limited understanding of Russian and prefer consuming local language media. Turkmen, English and Turkish are therefore regarded as more popular among younger audiences.

“ Turkmen, English and Turkish are therefore regarded as more popular among younger audiences ”

“ Compared to 2019, the popularity of television has noticeably decreased and, on the contrary, the use of the Internet and social networks has increased ”

1.5 Uzbekistan

According to the data from Internet World Stats, only half of the population in Uzbekistan has access to the global network.⁴⁸ The main sources of information about domestic news are television (66.29%) and Internet sites (39.85%). Compared to 2019, the popularity of television has noticeably decreased and, on the contrary, the use of the Internet and social networks has increased.⁴⁹

46 IPHR. (2020, March 23). Increased internet censorship: mass mobilisation for regime-praising events continues. <https://www.iphronline.org/increased-internet-censorship-mass-mobilisation-for-regime-praising-events-continues.html>; Ozturk A. (2022, May 27). Broadcasting of Russian state television channels suspended in Turkmenistan. Report News Agency: <https://report.az/en/region/broadcasting-of-russian-state-television-channels-suspended-in-turkmenistan/>; Obob. television. (2022, July 16). V Turkmenistan neskolko dney blokirovali sayty rossijskih telekanalov i gos. informagentstelevision. (“In Turkmenistan, the websites of Russian television channels and government news agencies were blocked for several days”). <https://obob.television/sobytiya/v-turkmenistane-neskolko-dney-bloki/>; Smirnov, V. (2022, July 16). Radio Azatlyk: VPN and Russian media websites blocked in Turkmenistan (“Radio Azatlyk: V Turkmenistan zablokirovali vpn i sayty rossijskih smi”). Rtelevisionl. <https://rtelevisioni.com/news/v-turkmenistane-zablokirovali-vpn-i-sajty-rossijskih-smi/>; RadioFreeEurope. (2022, May 30). Some Russian television satellite signals cut in Central Asia over sanctions. <https://www.rferl.org/a/russia-television-blocked-kyrgyzstan-turkmenistan/31875157.html>

47 Suleimanov, A. (2020, September 1). Budushchee russkogo yazyka v Turkmenistane: postupatelnyj i protestnyj szenaryj. (“The future of the Russian language in Turkmenistan: progressive and protest scenarios”). Berlek-Edinstelevisiono. <http://berlek-nkp.com/artur-suleymanov/8963-artur-suleymanov-cto-izvestno-o-russkom-yazyke-v-turkmenistane.html#sel=1:6,1:9>.

48 Datareportal. (2021). Digital 2021: Uzbekistan. <https://datareportal.com/reports/digital-2021-uzbekistan>.

49 Internews. (2021). Sociological study on media consumption and media information literacy in Uzbekistan for 2021, funded by USAID. <https://newreporter.org/mediastudy2021/>;

“ Uzbek residents watch and analyse the world through the Russian press and media because Russian is the country's second language and remains deeply ingrained among intellectuals ”

According to the results of the survey, the majority of the population prefers the Uzbek language when receiving information. 57.26% of respondents watch television only in Uzbek, while 25.37% of respondents watch both in Uzbek and Russian. 44.35% of respondents read news on the Internet only in Uzbek and 4.72% of respondents - only in Russian, whereas 16.96% of respondents prefer reading the news in both languages. Approximately the same linguistic preferences and figures can be observed with regards to the use of social networks.⁵⁰ That said, opinions diverge on this subject and, according to the Uzbek journalist Anora Sodikova, the majority of Uzbek residents watch and analyse the world through the Russian press and media because Russian is the country's second language and remains deeply ingrained among intellectuals and elites.⁵¹

50 Nuz.uz. (2022, 17 July). Iz kakih istochnikov uzbekistanczy cherpayut informacziyu o zhizni v strane. (“From which sources do Uzbeks get information about life in the country?”). Nuz.uz. <https://nuz.uz/obschestelevisiono/1249195-iz-kakih-istochnikov-uzbekistanczy-cherpayut-informacziyu-o-zhizni-v-strane.html>.

51 Temirov R. & AFP. (2022, 29 April). In Uzbekistan, calls grow to ban Kremlin-controlled television channels. Caravanserai. https://central.asia-news.com/en_GB/articles/cnmi_ca/features/2022/04/29/feature-01.



| Chapter 2 |

Methodology

The study employs a mixed-methods approach, combining quantitative and qualitative data collection and analysis:

- > Quantitative data survey with a sample size of 2.400 (600 per country) respondents from specific target groups across Central Asia.¹ This includes gender, age, and language representativeness, as is shown below:
 - gender balance: each gender making about 50% of respondents.
 - age groups: statistically relevant percentages of respondents in the age category between 18-40 age group and 55+ age group) and;
 - language groups: statistically relevant percentages of respondents in the category of ‘first language preference Russian speakers for news consumption’ and ‘non-Russian first language preference for news consumption’.

- > Qualitative semi-structured in-depth interviews involving 60 media consumers from target groups per country, meaning a total of 240 interviews. While the sampling for qualitative interviews is non-random, respondent selection respected the gender, age, and language quotas as with the quantitative part.

- > Additional 30 targeted (including at least 15 women) semi-structured expert interviews per country, with the following distribution:
 - journalists/content producers/bloggers (10),
 - civil society representatives and civic activists (10), and
 - policymakers at local, regional or national levels and representatives of think-tanks (10).

- > A comprehensive desk review was conducted covering the most relevant existing literature on the subject, including informal interviews with experts and practitioners.

“ The purpose of the mixed-research approach was to balance generalizable statistical findings with more context-specific and in-depth accounts ”

The purpose of the mixed-research approach was to balance generalizable statistical findings with more context-specific and in-depth accounts. The research team fully acknowledges the theoretical underpinnings of different research methods but shares the view that many important research questions “cannot be fully answered by either quantitative or qualitative methods alone”.² Given time constraints, quantitative and qualitative data collection was pursued simultaneously and an emphasis on targeting as much of the general population as possible was prioritised,

¹ Turkmenistan is excluded due to lacking access, information, and local researchers’ legal safety. Only desk research is conducted.

² London School of Hygiene & Tropical Medicine. (2020). What Are the Benefits of Using Mixed Research Methods? <https://www.futurelearn.com/info/courses/global-disability-research-and-evidence/0/steps/99204>

“ It also allowed us to gain insights into media consumption based on secondary factors, including urban-rural, socio-economic status or level of education ”

despite our focus on fulfilling the quotas of gender, language groups and age. Due to the amplexness of these quotas, the result was one which both includes a very large and representative sample of the population, while nonetheless focusing on our three selected priority quotas, which were built around our literature review. Quota sampling nevertheless carries its own biases and risks (“limits of randomization”) but remains the preferred method of reaching the target groups with a significant representativeness within the studied quotas. The research teams aimed at ensuring consistency between the two data collection processes through coordinated development of research instruments (survey questionnaires and interview questions for in-depth interviews) while harmonising the research process through regular meetings and cross-analysis discussions.

The quantitative research investigated the above research question and research themes by conducting a 35-questions phone questionnaire across each of the four selected countries (Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan). The 2,400 sample was designed to draw statistically relevant inferences about the assessments' primary concerns: gender, age, and language preference. It also allowed us to gain insights into media consumption based on secondary factors, including urban-rural, socio-economic status or level of education.

The qualitative in-depth interviews provided important insights into trends and patterns found in the survey. While some parts of research are best understood from a “wide” and quantitative perspective, more detailed information can only be gathered through a more “in-depth” and qualitative format.

Qualitative interviews (90 per country) included two categories: 60 interviews with general media consumers from target groups and 30 expert interviews with content producers and civil society representatives. The first category of interviews (media consumers from target groups) aims at providing deeper contextual insights into media consumption patterns, issues, and challenges, thus complementing the survey findings through an iterative approach. In turn, the semi-structured interviews with content producers and civil society representatives gave a full and broader understanding and mapping of each country's media landscape and expert views on changes in content production and spread in the context of large-scale political events at international and domestic levels. These interviews help shed light on the origins of disinformation, competing narratives both locally and from Russia, including how this information is impacted by international, regional, national, and local events. Overall, these interviews provide a more analytical and expert response to complement the rest of the study.

As mentioned above, this research project prioritises iterative coordination between quantitative and qualitative components. It is worth noting that the qualitative interviews and the quantitative survey took place simultaneously. During the first stage of the research planning, multiple coordination meetings were held between quantitative and qualitative

teams to provide information symmetry, feedback and coordination of methods and expectations, which supports the delivery of research and the final stages of recommendation. This was crucial during the planning and design of the semi-structured interview questions and the quantitative survey questionnaire.

The quantitative data analysis relies on descriptive statistics and examines the relationship across different responses through regression modelling in order to understand how primary factors, like age, gender, and language, as well as secondary factors like socio-economy and location, impact respondents media consumption habits, levels of trust, and preferences with regards to major events and types of information. Depending on the data collection, the analysis also relies on factor analysis. Findings from in-depth interviews were inferred through interpretive thematic analysis.

2.1 Quantitative Sampling

The quantitative survey has a sample of 2.400 survey respondents, which will henceforth be referred to as the total regional sample. This sample includes respondents from across all four identified target countries, namely Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. The sample is of the general population and the assessment specifically examines target groups that this study considers of utmost priority, namely gender (e.g. women) and groups more vulnerable to disinformation (e.g. language groups and age groups). Despite being a general population survey, target groups of primary interest were defined as women (gender), the 18-40 age group and the 55+ age group, as well as two primary linguistic groups (first-language preference Russian speakers and first-language non-Russian speakers, including all four national languages in the case countries). A quota system was used to increase the percentage of those respondents for each target group. It should also be noted that the quantitative questionnaire also included screening questions about income level, education level, geographical location, birthplace, and mother tongue, since these factors also contribute towards susceptibility (e.g. vulnerability) to misinformation. For the aforementioned reason, this quantitative survey aimed to draw inferences both about the sampled general population, as well as specific target groups, both on a regional (Central Asia) level, as well as in each of the four countries.

The overall statistical significance of the total regional sample (2.400) is significant with a Margin of Error (MoE) equaling 2% and a 95% Confidence Level (CL) based on a total regional population of 67.000.000. When analysing the specific target groups (youth, women, elderly, linguistic groups) on a regional level, the MoE is 3%, while the CL is 95%. When analysed solely on a country-level, the MoE drops to 6% and CL to 95%. Efforts to overcome the typical irregularities and biases in the sampling process, including un/employment, also known as telephonic hour-of-the-day bias (e.g. “housewife bias”), were also used. For example, the technical usage of multi-hour points of calling, randomised formula, and accounting for holidays and/or local cultural, work-related, or other

“ The quantitative survey has a sample of 2.400 survey respondents ”

household habits, helped diminish the chances of any form of bias.

The technical method used for this assessment is Simple Random Sampling (SRS) of mobile phone numbers, which was utilised to obtain a nationally representative sample of Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. All interviews were completed via desktop CATI applications from either in-office or in-home stations. The mobile sample was generated using simple random sampling of area codes outlined in the 2019 ITU national numbering plan. While mobile samples can be stratified by the provider, all numbers were sampled via simple random sampling because of the ambiguity of information provided by the telecommunication authorities. All possible area codes and subscriber codes (remaining digits following the area code) were generated in Reactive User Interface Database (DRUID), an R database interface developed for the generation, managing, and sampling of Random-Digit Dialling (RDD) telephone databases; DRUID then housed the complete sampling frame. From this database, complete random telephone numbers were sampled and more specifically, the quantitative research conducted randomised 15-minute telephonic polling consisting of approximately 35 questions.

“ The technical method used for this assessment is Simple Random Sampling (SRS) of mobile phone numbers, which was utilised to obtain a nationally representative sample of Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan ”

For this survey, numbers were sampled without replacement. For each sample of mobile telephone numbers generated, surveyors created a subsample, or replicate, sent to be filtered to determine working status for each phone number through a routinely updated database of all working SIM cards. Once the replicates were filtered, surveyors delivered replicates sized between 5.000 and 10.000 numbers in Excel workbooks. Mobile devices are assumed to be personal, and therefore the person who answers is the selected respondent if he or she fulfills the initial screening criteria (aged 18+, residing in survey country). If a minor answered the phone, the interviewer would determine the owner of the phone before determining eligibility for participation. The data were weighted in all countries to adjust for minor statistical imbalances. The weight variables used in all four countries were the same: region, gender, age, ethnicity, and type of residence (urban/rural). While we recommend the use of the weight factor, it makes minor differences in the results because the underlying samples are almost on target. It is also important to note that the weighting factors are designed to look at the results of the survey by country, and not in the aggregate (all four countries grouped as one unit). Additional weighting would be required to look at the data in aggregate, which can include adjustments via weighting (e.g. base weight, raking, trimming, rescaling).

Concerning field implementation: fieldwork utilised replicate workbooks, each containing between 5.000 and 10.000 phone numbers. Four replicate workbooks were used in both Kazakhstan and Kyrgyzstan, and one in each Tajikistan, and Uzbekistan. Once a phone number is successfully contacted, the person who answered the phone is the designated respondent. If a child (under 18) answered the phone, the interviewer asks if the child owned the phone. If the minor did not own the mobile phone, the interviewer was asked to be passed to the owner of the phone. Re-

spondent substitution was not permissible in this survey and if the selected respondent was unable to participate during the contact attempt in which they were selected as the designated respondent, the interviewer would proceed with recontact procedures. After three unsuccessful attempts, the number was recorded as a non-contact, and a new number was substituted into the sample. Each interviewer kept records of calls and call outcomes (see data safety).

Due to sensitivities related to interstate (Russia and Ukraine, Kyrgyzstan and Tajikistan) and domestic conflicts (e.g. unrest in Kazakhstan, Tajikistan, and Uzbekistan), and government censorship, certain questions were amended or deleted in the questionnaires for specific countries in consultation with all partners.

2.2 Qualitative Sampling

The qualitative data collection included a total of 360 semi-structured in-depth interviews, 90 in each of Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan. The in-depth interviews aimed at providing a comprehensive understanding of the ways in which media consumption preferences and patterns among the target groups relate to the interpretation of Russia's war of aggression against Ukraine and of the events that shook the region during the first six months of 2022. The semi-structured questionnaire with open-ended questions allowed respondents greater freedom and space to elaborate on main topics and capture nuances, and thus, complement the results of the survey.

“ The qualitative data collection included a total of 360 semi-structured in-depth interviews ”

An important purpose of the qualitative interviews was to support the quantitative survey in terms of providing additional and more targeted findings in detailed areas, like for example the 18-40 and 55+ age groups, with regards to media consumption or vulnerability to disinformation. In other words, these interviews provide in-depth additional information that the surveys could not provide. It is therefore key in this study that the survey questionnaire and the semi-structured qualitative interview questions were actively developed in coordination to ensure internal consistency and complementarity.

Interviews were held using different types of non-probability sampling, including quota, snowball, and purposive approaches. As shown in Table 1., quota samples were employed to ensure the media consumers group is balanced in terms of age (the focus is on two age groups, 18-40 and 55+) and primary media consumption language (Russian and non-Russian). The total of 60 interviews with media consumers per country included 50% women. Within these groups, respondent recruitment relied on snowball techniques (e.g. using referrals from participants to identify new respondents). In turn, expert interviews with content producers, civil society representatives and policymakers employed purposive sampling reflecting the fact that these are groups with specific characteristics. As for expert interviews (30 per country), purposeful sampling was employed in which the primary criterion was to identify a person with necessary professional background, e.g. a professional in content production

“ Qualitative research allows for a deeper understanding of the research topics but does not result in statistically representative findings. Therefore, the quota figures above are proposed solely to ensure balanced coverage of participants from these groups ”

(journalists, bloggers etc.) and civil society representatives. No age, gender and other quota was applied. Qualitative research allows for a deeper understanding of the research topics but does not result in statistically representative findings. Therefore, the quota figures above are proposed solely to ensure balanced coverage of participants from these groups.

Table 1. Media consumers category quota groups within one country

Age	Primary media consumption language: non-Russian	Primary media consumption language: Russian	Total
18-40	15	15	30
55+	15	15	30
Total	30	30	60

2.3 Confidentiality and Security of Respondents

The guiding principle of the research is “do no harm”. Central Asia is a region with known cases of obstruction to research and/or harassment or persecution against researchers and research participants. The security and privacy of respondents is a priority and will be ensured through the following:

- Confidentiality: interviews did not collect information that may identify a respondent. Respondents were informed that no research output was to be attributed to an individual. The personal information of respondents in the case of expert interviews was stored separately from transcripts.
- Informed consent: each respondent was informed of the research purpose, confidentiality measures and of the right to refuse interview or stop the interview at any point. However, a written consent was not sought given a high level of suspicion and unwillingness of respondents in the region to sign a written document.



| Chapter 3 |

Quantitative Analysis

The first part of the quantitative section of the quantitative analysis deals with general media consumption. The second part deals with language preferences across the media, meaning primarily in what languages consumers prefer to access their news and information. The third part identifies consumer's trust in media and fake news (disinformation), while the fourth, and final, part outlines consumer's perceptions about Russia's war of aggression against Ukraine and other global events. Each quantitative part includes regional findings, followed by national-level findings for each of the Central Asian republics, with the exception of Turkmenistan. These sections are descriptive and outline the survey results from the Central Asian region and across each of the four countries on the aforementioned topics.

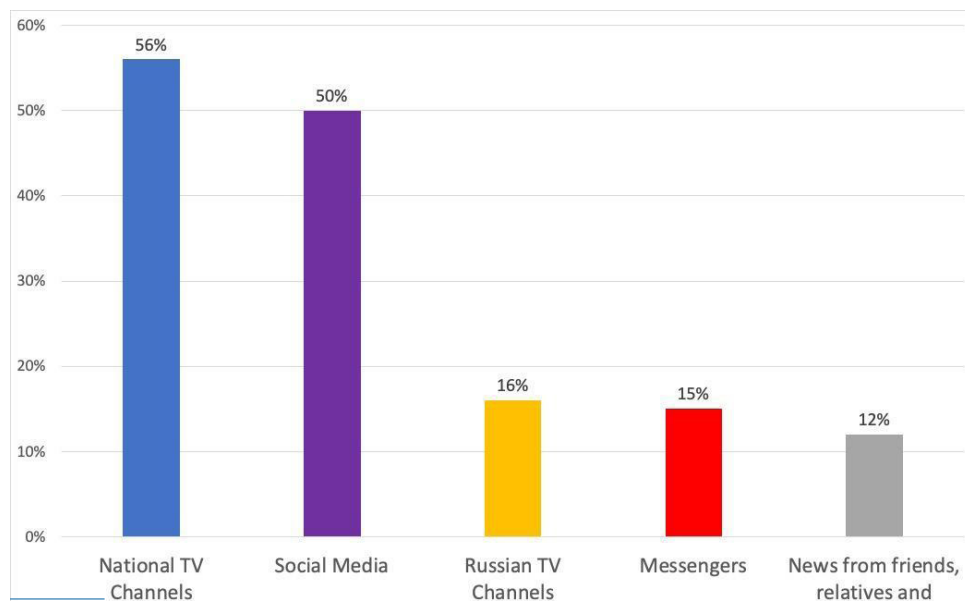
Throughout the quantitative section, key figures are presented as important guidelines for content-producers when tackling disinformation and targeting communities in demand of independent news. However, the main recommendations for content-producers will be presented in the final recommendation section of this study, which blends both quantitative and qualitative analysis.

3.1 General Media Consumption

Across Central Asia, general survey respondents indicate that the most common source of domestic news is overwhelmingly national television and social media¹, as the ranking shows in graph 1 below.

“ the most common source of domestic news is overwhelmingly national television and social media ”

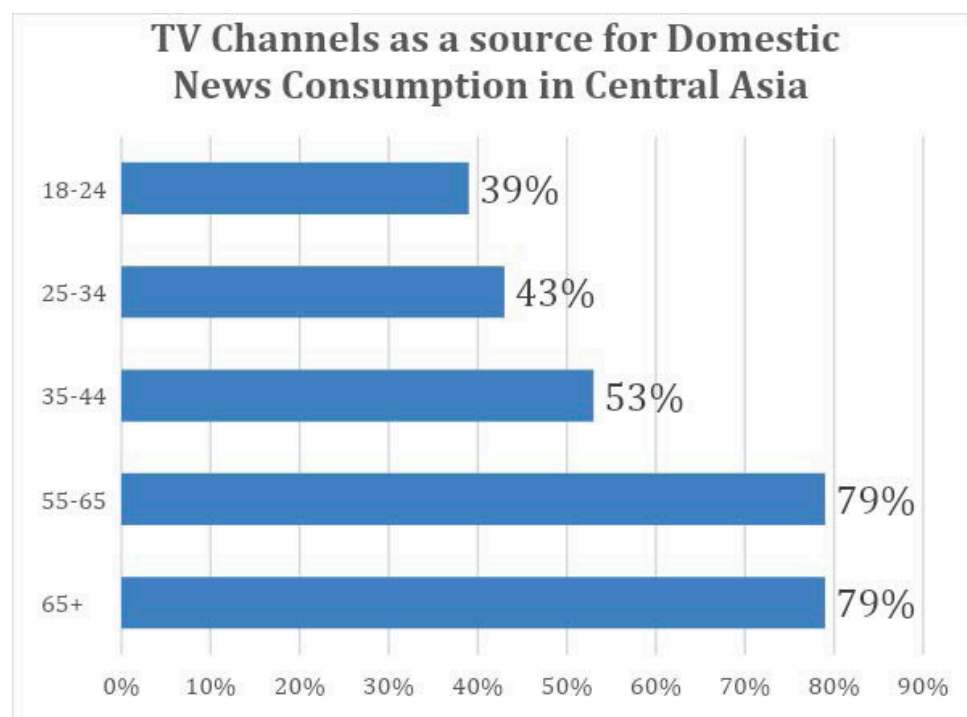
Graph 1. Domestic News Sources



¹ With regards to what constitutes social media in this survey it was decided to count social networks such as Facebook, Instagram, Twitter, etc. Messengers are represented by the platforms used for private exchange of messages (WhatsApp, Telegram, Viber, etc.)

It is however important to differentiate between television and social media consumers. Age is shown to be the determining factor when examining whether television is a common source of domestic news for surveyed populations with younger groups 18-24 consuming television at far lower rates (39%) compared to the 55+ age group (79%), as can be seen in graph 2 below.

Graph 2. Television channels as a source for domestic news consumption per age group

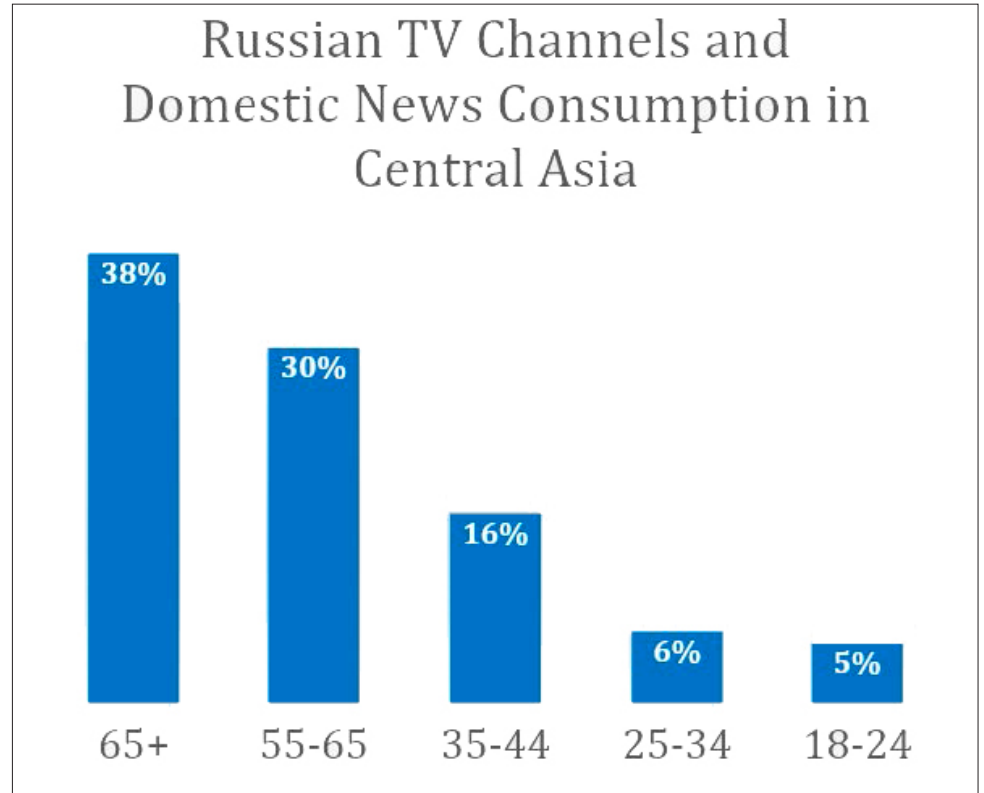


“ The age group defined as 55+ is far more likely to consume national television than the 18-40 age group ”

The age group defined as 55+ is far more likely to consume national television than the 18-40 age group. It is therefore clear that there is a correlation between age and reliance upon television as a source of domestic news, but it remains too simplistic to categorise this as ‘old’ versus ‘young’, since the survey shows gradualness in terms of how age groups consume television, with the exception of the 55+ categories.

The survey also shows how age is equally important when defining who specifically consume Russian television channels. For example, in graph 3 below the 55+ age group is far more likely to consume Russian television channels compared to the 18-44 age group. The graph highlights this extreme gap, which ranges between 5% and 38% for 18-24-year-old and 65+ year-old respectively.

Graph 3. Russian television channels and domestic news consumption per age group

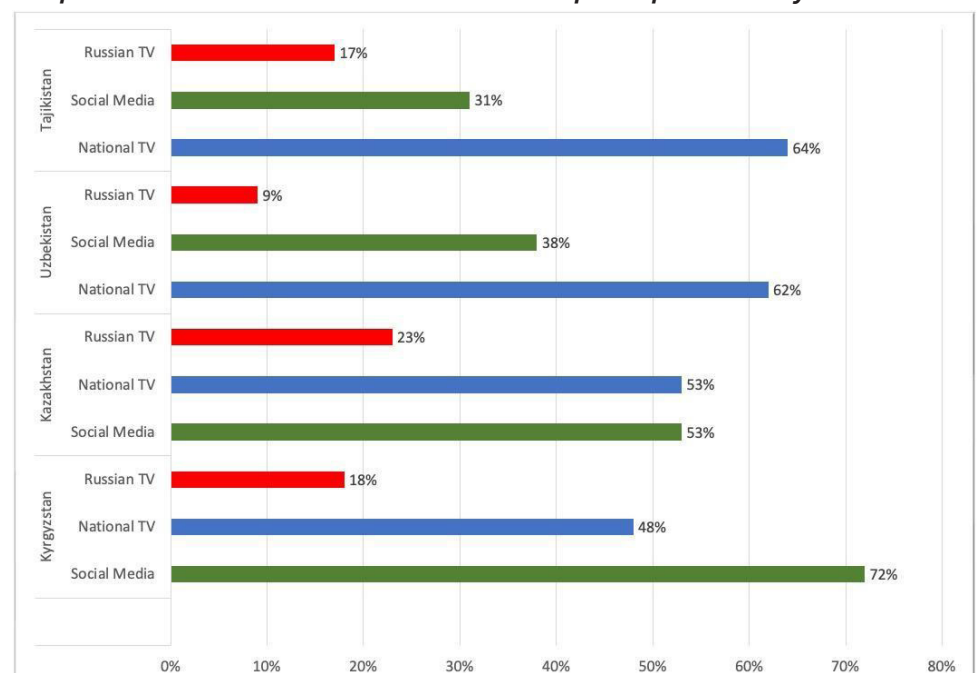


“ ‘age’ primarily defines who consumes Russian television ”

“ The 55+ age group is far more likely to consume Russian television channels compared to the 18-44 age group (for domestic news consumption) ”

The number of respondents who consume Russian television channels for domestic news are nearly the same in both rural (21%) and urban (22%) areas. Instead, what is clear from these sections is that ‘age’ primarily defines who consumes Russian television overall. In addition, the urban-rural divide, gender and language preferences remain less important when examining who consumes Russian television for “what is happening abroad”, while age plays the leading role.

Graph 4. Domestic news sources consumption per country



“ 72% of Kyrgyzstanis rely heavily on social networks as their main source of domestic news, which is the highest number compared to all four countries ”

“ Kyrgyzstanis who have Russian language preferences were slightly more likely than others to rely upon Russian television channels as their main source of domestic news ”

“ Less educated respondents are more likely to rely upon national television channels as their main source of domestic news compared to more educated respondents ”

“ Uzbekistani women are 13% less likely to use social media for domestic news than their male counterparts, and women are 9% more likely to instead rely upon Uzbekistani television channels ”

As can be seen above in graph 4, 72% of Kyrgyzstanis rely heavily on social networks as their main source of domestic news, which is the highest number compared to all four countries. Other popular sources of domestic news include national television (48%) and Russian television (18%).

Overall, while social media dominates as Kyrgyzstanis' main source of domestic news, both foreign and domestic television channels remain an important source as well. The majority of those from the 55+ age group get their news primarily from Kyrgyzstan's national television channels, at 76%. However, the majority (52%) of those from the 18-40 age bracket get their domestic news primarily from social media networks.

Kyrgyzstanis who have Russian language preferences were slightly more likely than others to rely upon Russian television channels as their main source of domestic news. Otherwise, there are no major differences between them and their non-Russian-preference counterparts as to what sources they rely upon.

Less educated respondents are more likely to rely upon national television channels as their main source of domestic news compared to more educated respondents. Less educated respondents are also more likely to receive their domestic news directly from their friends, family, and neighbours. Those who are more educated prefer to receive their domestic news via social media, with 52% of those with incomplete higher education and 78% of those with complete higher education primarily relying upon this source.

Kazakhstanis rely most heavily upon social media and Kazakhstani television channels as their main source of domestic news, at 53% respectively. Age brackets and the urban-rural divide applies for Kazakhstan too. Older and rural consumers watch more television on average, while other frequently used sources include Russian television channels at 23% and messengers at 17%.

Uzbekistanis mainly get their domestic news from Uzbekistani television channels, at 62% and less frequently from social media, at 38%. Messengers (24%) also remain a popular option for media consumers. Uzbekistanis rarely rely upon Russian television channels (9%) to get their domestic news, which is substantially lower compared to the other countries. Age brackets similar to the general findings also apply for Uzbekistan, meaning that the younger respondents consume less television on average.

Uzbekistani women are 13% less likely to use social media for domestic news than their male counterparts, and they are 9% more likely to instead rely upon Uzbekistani television channels. Respondents in rural areas are also much less likely to rely on social media and messengers for domestic news and instead turn to Uzbekistani television channels 14% more frequently than their urban counterparts.

64% of Tajikistanis primarily rely upon Tajikistani television channels as

“ In terms of age, those from the 55+ age bracket are more likely to rely upon local and Russian television channels more so than those in the 18-40 age group who instead use more social media for domestic news ”

“ higher income levels equates with more social media consumption, but equally with higher levels of Russian language consumption in urban areas ”

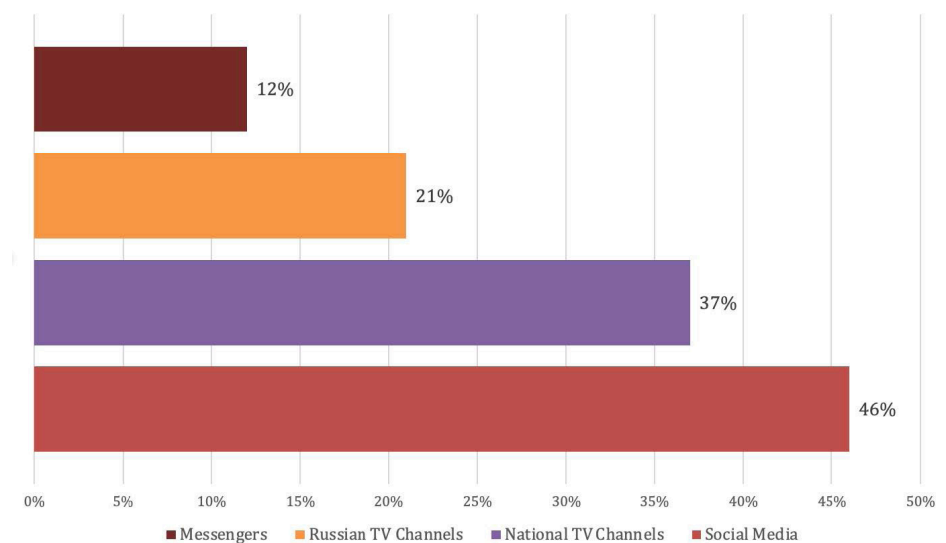
their source of domestic news. Less frequently, they use social media (31%), friends, relatives, and neighbours (17%), and Russian television channels (17%). On average, television is far more dominant in Tajikistan, while social media is less popular amongst consumers.

In terms of age, those from the 55+ age bracket are more likely to rely upon local and Russian television channels more so than those in the 18-40 age group who instead use more social media for domestic news. There is no pronounced gender divide on this topic, however, women are 8% more likely to rely on friends, relatives, or neighbours for domestic news than their male counterparts. Those in rural areas are nearly half as likely (24%) to get their domestic news from social media than their urban counterparts (42%).

It appears that higher income levels equates with more social media consumption, but equally with higher levels of Russian language consumption in urban areas. The Russian language is more frequently used to read the news in urban areas (68%) than in rural areas (45%). A bigger discrepancy is noticeable when comparing levels of education: 74% of more educated respondents obtain news in Russian, while the share of their counterparts with lower levels of education is 46%. Respondents with a higher income, use Russian language for obtaining news slightly more frequently than respondents with a lower income: 64% versus 51%. It is therefore possible to deduce that the use of Russian language in obtaining news may correlate with the socio-economic status of respondents, as well as urban versus rural domiciliation.

Across Central Asia, survey respondents indicate that they receive their international sources of news in a more varied (“diversified”) way compared to their domestic news sources. For example, social media is relied upon more for international sources of news, while national television consumption is lower, as graph 5 below indicates.

Graph 5. International News Sources



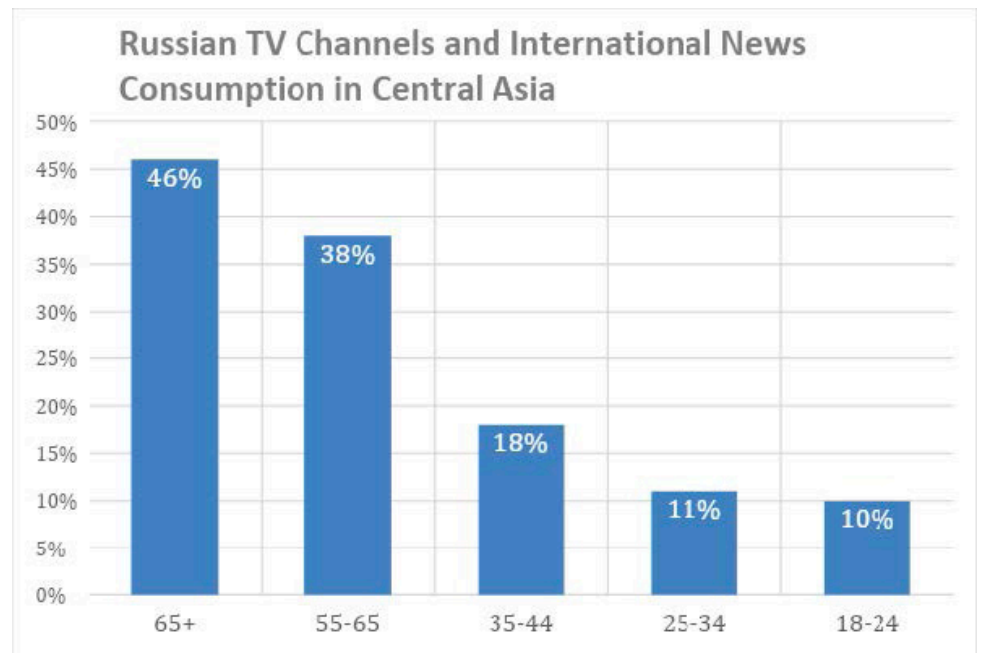
“ 55+ older age groups watch nearly four-times more Russian television compared to age groups between 18 and 34 ”

“ In other words, it is likely that upcoming older generations (55+) will use social media for news in the upcoming decades, as long as the production of news content is made available to them in online formats ”

“ the majority of Kyrgyzstanis receive their international news from social media networks (68%) and domestic television channels (30%) ”

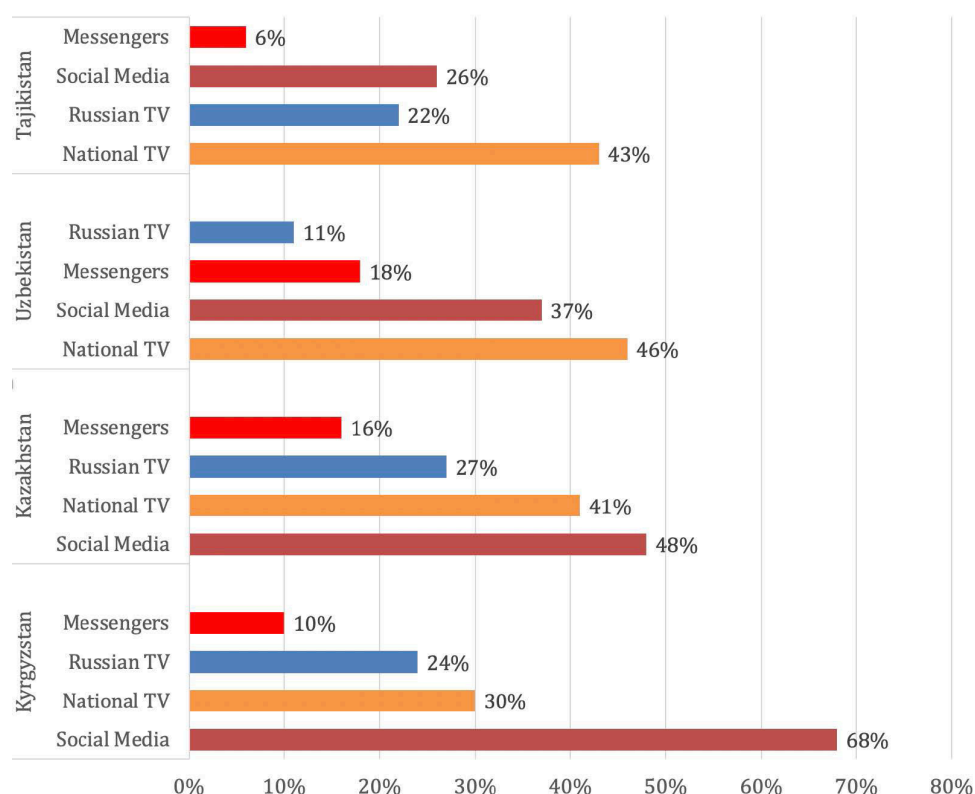
When looking specifically at the usage of Russian television channels, age plays a very significant effect. Graph 6 below shows how 55+ older age groups watch nearly four-times more Russian television compared to age groups between 18 and 34. It also shows another interesting hypothesis; namely that the reliance on Russian television channels does not necessarily only correlate with age, as it could also be caused by generational change and online news availability. In other words, it is likely that upcoming older generations (55+) will use social media for news in the upcoming decades, as long as the production of news content is made available to them in online formats.

Graph 6. Russian television channels and international news consumption per age group



When looking specifically at the usage of social media, age also plays a very significant effect: 63% of those 18-24 and 52% of those 25-34 and 48% of those 34-44 use social media to access international sources of news.

Graph 7. International news source consumption per country



As can be seen above in graph 7 the majority of Kyrgyzstanis receive their international news from social media networks (68%) and domestic television channels (30%). Russian television channels are the third most popular option, at 24%. Those from the 18-40 age bracket are much more likely to rely on social media for international news than those 55+ who instead more frequently watch television. Interestingly, the percentage of those 55+ who watch Kyrgyzstani and Russian channels are nearly the same. Russian media appears to be more important for this age bracket than their younger counterparts, as can also be seen in previous examples.

“ Most Uzbekistanis receive their international news from Uzbekistani television channels (46%), social media (37%), and messengers (18%), while Russian television channels are used much less frequently (11%) ”

The majority of Kazakhstanis receive their international news from social media (48%), Kazakhstani television channels (41%), Russian television channels (27%), or messengers (16%). Kazakhstanis appear to get their international news from the same sources, which they rely on for domestic news, with only slight variations.

Most Uzbekistanis receive their international news from Uzbekistani television channels (46%), social media (37%), and messengers (18%), while Russian television channels are used much less frequently (11%).

In Tajikistan, the majority of respondents receive their international news from Tajikistani television channels (43%), Russian television channels (22%), and social media (26%). Tajikistanis appear to get their international news primarily from the same sources which they rely on for domestic news. However, they are much more likely to rely upon television channels (both domestic and Russian) for international news, while social media remains far less popular.

“ Tajikistanis appear to get their international news primarily from the same sources which they rely on for domestic news. However, they are much more likely to rely upon television channels (both domestic and Russian) for international news, while social media remains far less popular ”

“ In Kyrgyzstan, the two most popular specific sources of news were KTRK at 28% and Alatoo at 13%. Another 17% said that they do not pay attention to the names of news sources ”

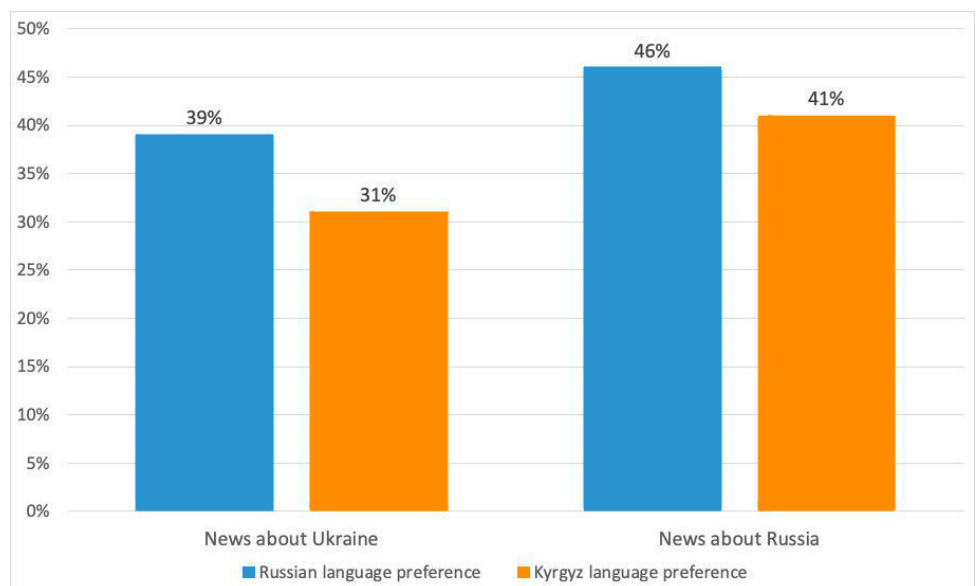
“ Overall and cross-comparatively, those with Russian language-preferences are also more likely to follow news about Russia and Ukraine ”

In our survey, we also asked from which specific sources (television channels, radio stations, websites) consumers obtain their news.

In Kyrgyzstan, the two most popular specific sources of news were KTRK at 28% and Alatoo at 13%. Another 17% said that they do not pay attention to the names of news sources. Consumers within rural areas were more likely (12% more) to use EITR than their urban counterparts. Popular sites such as KTRK and Alatoo were more likely to be used by those 55+ while their younger counterparts used a wider variety of sources. In Kazakhstan, the three most popular specific sources of news were Habar (19%), KTK (19%), and 1evraziya (16%). In Uzbekistan, the three most popular specific sources of news among Uzbekistanis were Zo'r television (31%), Sevimli (30%), and My5 (27%). In Tajikistan, the three most popular specific sources of news were television Tochikiston (36%), TV Chahonnamo (26%), and television Safina (21%). There were 18 unique responses to this question, with 48% choosing “other”.

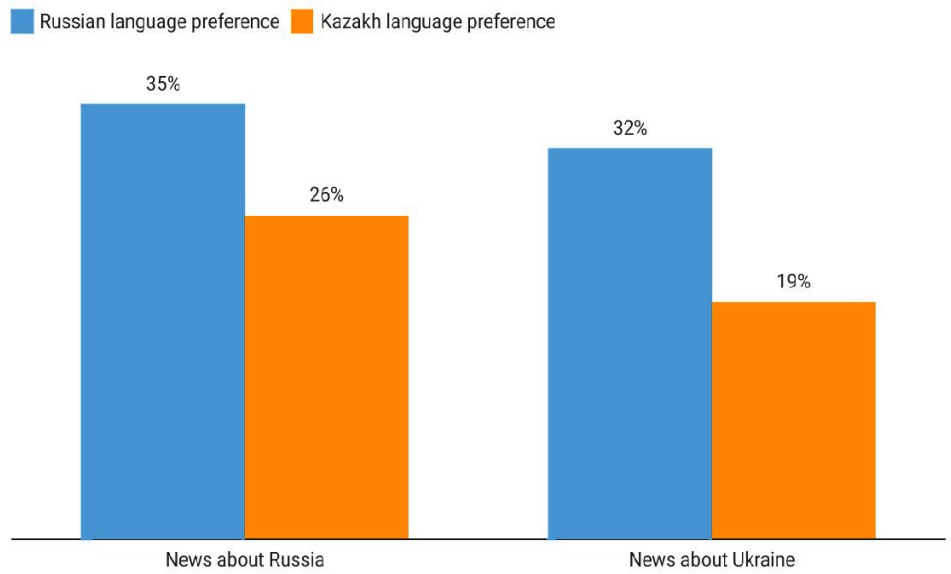
The survey also asked what principal topics consumers seek in the media. Kyrgyzstanis are the most interested in watching Russian and Ukrainian news, compared with other Central Asian countries, while Kazakhstanis are less interested in these topics and are more interested in domestic and broadly international news. Uzbekistanis tend to consume more entertainment-based media than other Central Asian states, such as sports, while Tajikistanis are most interested in domestic and broadly international news. Overall and cross-comparatively, those with Russian language preferences are also more likely to follow news about Russia and Ukraine (see graphs 8 and 9 below).

Graph 8. Language preference and news about Russia and Ukraine: Kyrgyzstan



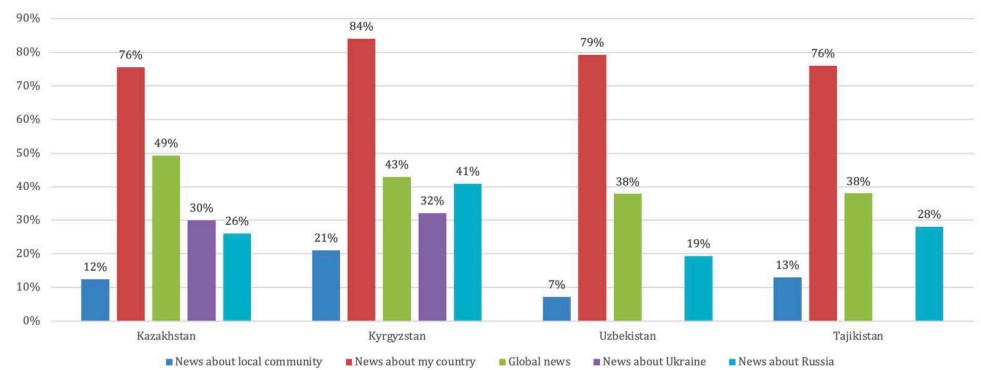
Graph 9. Language preference and news about Russia and Ukraine: Kazakhstan

What topic information do you usually get in the media?



Source: Central Asia Barometer • Created with Datawrapper

Graph 10. News consumption per country



“ Those from the 55+ age bracket are extremely concerned with domestic issues, while those 18-40 are less interested in this topic, which indicates that younger ages appear to have a less localised-view, which correlates with their diversified and broader social media consumption patterns ”

“ Kazakhstanis are most interested in consuming news about Kazakhstan (76%), the world (49%), and Ukraine (26%) with Russia in third place (25%) ”

As seen in graph 10, Kyrgyzstanis are most likely to consume news about Kyrgyzstan (84%), the world as a whole (41%), and Russia (41%). Interestingly, only 32% consume news about Ukraine, while 21% are interested in topics within their own communities and less than 20% pay attention to news about other Central Asian states. It appears that Kyrgyzstanis are more likely to follow coverage of Russian current affairs than those of Ukraine, which may perhaps have an impact on their sentiments surrounding Russia’s war of aggression against Ukraine. Those in urban areas are much more interested in global affairs than their rural counterparts at 56% and 36% respectively. Kyrgyzstanis with a preference for Russian language were slightly more interested in news about Russia and Ukraine than their counterparts, while there was no significant gender, socio-economic, or educational divide on this topic.

Kazakhstanis are most interested in consuming news about Kazakhstan (76%), the world (49%), and Ukraine (26%) with Russia in third place (25%). Less than 10% follow news about other Central Asian states and it appears that Kazakhstanis are more generally concerned with domes-

“ Uzbekistanis appear to consume less news and political media compared to their counterparts in other Central Asia countries ”

“ Those from the 55+ age bracket are extremely concerned with domestic issues, while those 18-40 are less interested in this topic, which indicates that younger ages appear to have a less localised-view, which correlates with their diversified and broader social media consumption patterns ”

tic issues than international ones. Those from the 55+ age bracket are extremely concerned with domestic issues, while those 18-40 are less interested in this topic, which indicates that younger ages appear to have a less localised-view, which correlates with their diversified and broader social media consumption patterns. Those with Russian language preferences are more likely to follow the news in Russia and Ukraine than their counterparts without such language preferences. There was no significant gender, socio-economic, or educational divide on this topic

In Uzbekistan (of those asked: 40% were not), respondents appear to be most interested in consuming media focused on sports (25%), entertainment (23%), and politics (22%). Uzbekistanis appear to consume less news and political media compared to their counterparts in other Central Asia countries. Those in the 55+ age bracket were less likely to consume media in general across all themes mentioned. Women were on average 10% less likely than their male counterparts to consume media concerned with politics, economics, or technology, and were 10% more likely to be interested in cultural or entertainment media than their male counterparts. Uzbekistanis in rural areas are less likely to consume media in general across all themes when compared to those in urban areas. Those with a higher income were more likely to consume media across all categories than those in less stable socio-economic situations. This is also true of those with higher education, compared to those with lower levels of education. It is therefore clear that there is a correlation between socio-economic standing, education, and media consumption, regardless of theme. However, those with Russian language preferences consume more political, economic, and technology-focused media when compared to those without these preferences.

Tajikistanis are mostly interested in news about Tajikistan (76%), the world (38%), and Russia (28%). Those with a higher income are more interested in world news and news about Russia. This number increases with income. Those with Russian language preferences consume more world news and news about Russia than their counterparts without these preferences.

In our survey, we also asked what digital services are used to obtain information and news by consumers.

Table 2. Age and digital service preference

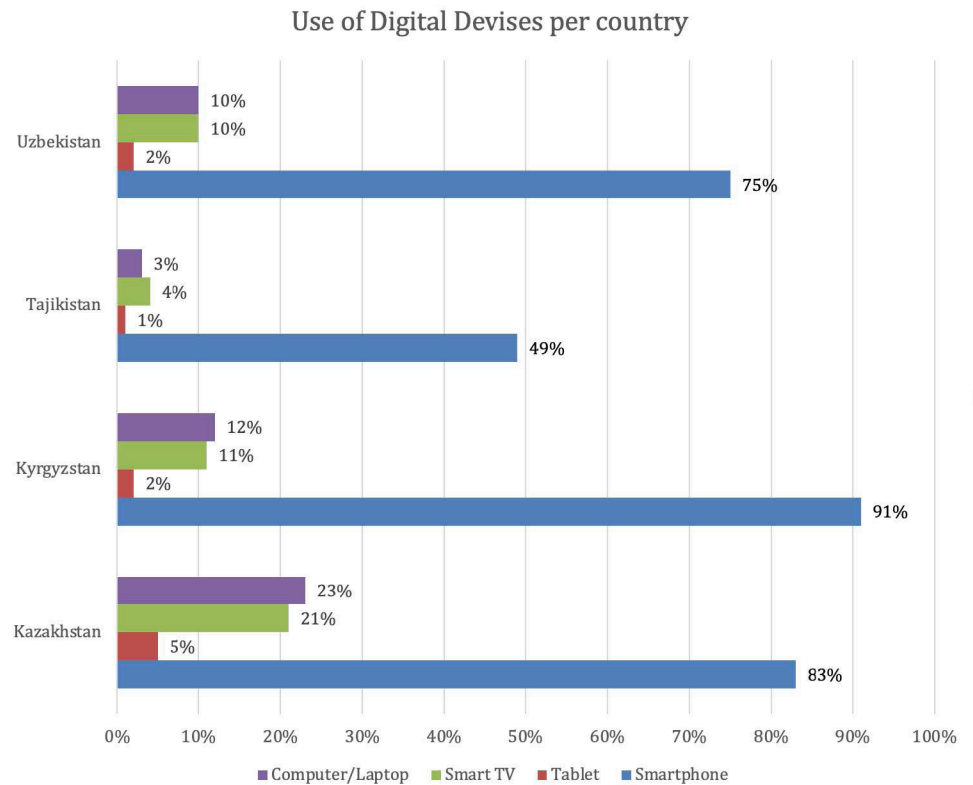
Age	Smartphone	Tablet	Smart TV	Computer/Laptop
18-24	90%	5%	10%	18%
25-34	85%	2%	9%	11%
35-44	77%	3%	12%	12%
45-54	69%	3%	15%	12%
55-64	54%	1%	12%	8%
65+	39%	2%	11%	11%

“ Across the region, Central Asians are most likely to obtain information and news via their smartphone (74%) ”

“ Smartphone usage for news is highest in Kyrgyzstan, followed by Kazakhstan, Uzbekistan and finally Tajikistan ”

Across the region, Central Asians are most likely to obtain information and news via their smartphone (74%). Other popular options include a computer at 12% and Smart Television at 11%. In table 2 it is clear that respondents in the 18-40 age category are much more likely to get their information and news via a smartphone: 90% of respondents aged between 18-24, 85% of respondents aged between 25-34 and 77% of respondents aged between 35-44 primarily use their phones. In contrast, those aged between 55-64 (54%) and 65+ (39%) are far less likely to rely upon this device for news consumption. Those in rural areas are equally less likely to use a smartphone (66%), computer (7%), or Smart Television (8%) than those in urban areas where the usage of smartphones (81%), computers (17%), and Smart Televisions (14%) is more frequent. It is noteworthy to indicate that Smartphone usage for news is highest in Kyrgyzstan, followed by Kazakhstan, Uzbekistan and finally Tajikistan (graph 11).

Graph 11. Use of digital devices per country



“ Older respondents aged 55+ are more reliant on state media constituting 60% of all respondents who follow daily, while the share of 18-40 age group is almost two times less at 30.5% ”

“ the highest usage of state-media for news is recorded in Uzbekistan, followed by Kyrgyzstan, Tajikistan and finally Kazakhstan ”

When consumers were asked about the usage of state-media for information and news, the results indicate that 39% of Central Asians follow state media every day and 32% check the news via state-media several times a week. 10% follow state media several times a month, while 12% follow once a month or rarely and only 5% said that they do not follow the news from state media. Older respondents aged 55+ are more reliant on state media constituting 60% of all respondents who follow daily, while the share of 18-40 age group is almost two times less at 30.5%. Smaller percentages of respondents who do not follow state media at all demonstrated that respondents in urban areas are more likely to exclude state media from news consumption rather than rural respondents.

When comparing each country’s respondents’ usage of state-media for news, it is noteworthy to add that the highest usage of state-media for news is recorded in Uzbekistan, followed by Kyrgyzstan, Tajikistan and finally Kazakhstan.

With regards to the usage of the internet to obtain information and news, approximately 20% of all respondents across Central Asia don’t get their news online. A majority of Central Asians get the news online every day or several times a week. Younger generations predominantly use the internet for the news, while older respondents use the internet substantially less for news.

In terms of what specific social networks are used by consumers, the findings show that Central Asians have a majority-preference towards

“ In terms of what specific social networks are used by consumers, the findings show that Central Asians have a majority-preference towards YouTube and Instagram ”

“ Instagram is used more by women (70%) than by men (51%) ”

“ TikTok is far less popular in Uzbekistan as only 5% of respondents use this platform, which is also the case for Odnoklassniki ”

“ more educated and well off the respondent is, the more likely he uses Facebook and Instagram. This is not the case for YouTube, which is more or less equally popular among these groups ”

YouTube and Instagram. Facebook and TikTok are similar in popularity levels with around 20% of the populations of Central Asia utilising these platforms. Odnoklassniki is used by around 12% of the population and LinkedIn and Twitter are used by less than 5% of the total populations across Central Asia.

YouTube (65%) and Instagram (60%) are the two most popular social networks that Kyrgyzstanis use. TikTok (38%) and Facebook (32%) are quite similar in the amount of population which uses them. Odnoklassniki is used by 20% of the population and Twitter and LinkedIn constitute less than 5% of the Kyrgyzstani population. There are no gendered differences on the preference for social networks with the exception of Instagram. Instagram is used more by women (70%) than by men (51%). There are no significant differences between urban and rural respondents, but the data suggests that in urban areas there are 10% more Facebook and Instagram users than in rural areas, which is insignificant considering the margin of error. There are no significant differences between people based on education level, income level, and language preferences.

In Kazakhstan, 60% of the population use Instagram and 50% use YouTube. TikTok is used by 30% of the population and Facebook and Odnoklassniki are used by around 20% each. As can also be observed in Kyrgyzstan, Instagram is more used by women (72%), than by men (47%). There are no significant differences between respondents based on education level, income level, urban/rural and the language preferences.

Around 15% of Uzbekistanis¹ do not use social networks at all. YouTube is the most popular social network and about half of the population uses it. Instagram ranks in second place with 23%, followed by Facebook (15%). In contrast to the previous two countries, TikTok is far less popular in Uzbekistan as only 5% of respondents use this platform, which is also the case for Odnoklassniki. Females in Uzbekistan use social networks slightly less than males, which is the case even for Instagram, which is more popular among females in both Kazakhstan and Kyrgyzstan. Urban respondents use social networks around 50% more than rural respondents with the exception of YouTube, the usage of which is similar between both groups at around 50%. For Instagram and Facebook usage, there is a correlation with the education level and income level: the more educated and well off the respondent is, the more likely he uses Facebook and Instagram. This is not the case for YouTube, which is more or less equally popular among these groups.

40% of Tajikistanis were not asked this question because they indicated that they do not get news online. 40% of Tajikistanis use YouTube, 26% use Instagram and 22% use Facebook. TikTok is used by 12% and Odnoklassniki 9%. The usage of social media correlates with age: the younger the age the more likely the respondent uses one of the men-

¹ 20% of Uzbekistanis weren't asked this question, since earlier during the interview they indicated that they do not get news online.

“ sports and politics are the two most popular topics, which respondents across Central Asia consume the most ”

tioned social media. Men use Instagram and Facebook 50% more than women, while the same applies for the urban-rural divide.

Across Central Asia, consumers were also asked what sort of news they look for online, as well as which instant messengers they use. For these questions, sports and politics are the two most popular topics, which respondents across Central Asia consume the most - around 33% each. Culture, entertainment, technology, and economy are topics which get the attention of around 20% of the Central Asian population.

In terms of messenger, Central Asians predominantly use WhatsApp (58%), Telegram (39%), IMO (10%), Viber (4%) as messengers.

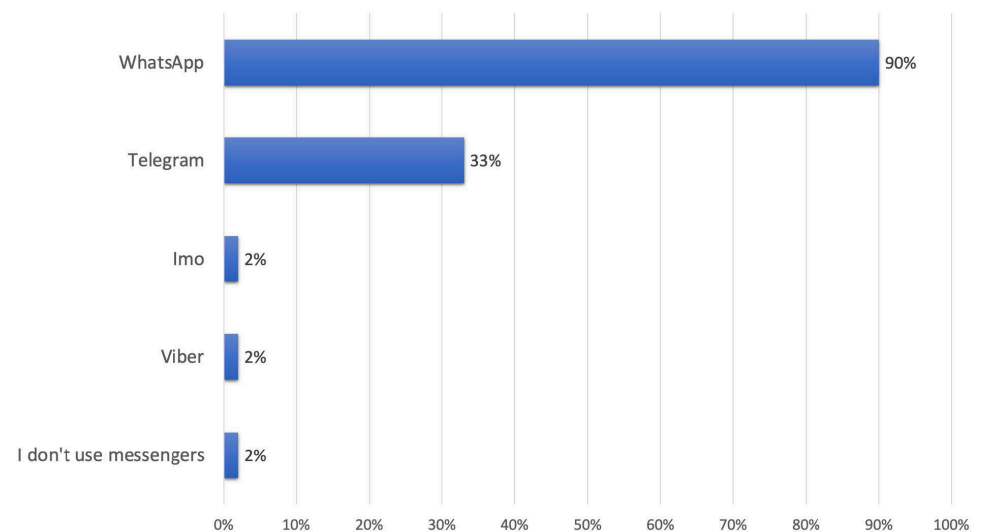
Table 3. Age and use of messenger applications

Age	WhatsApp	Telegram	Viber	Imo
18-24	68%	64%	6%	10%
25-34	62%	51%	6%	11%
35-44	63%	39%	4%	11%
45-54	58%	27%	4%	8%
55-64	45%	17%	3%	9%
65+	35%	12%	1%	3%

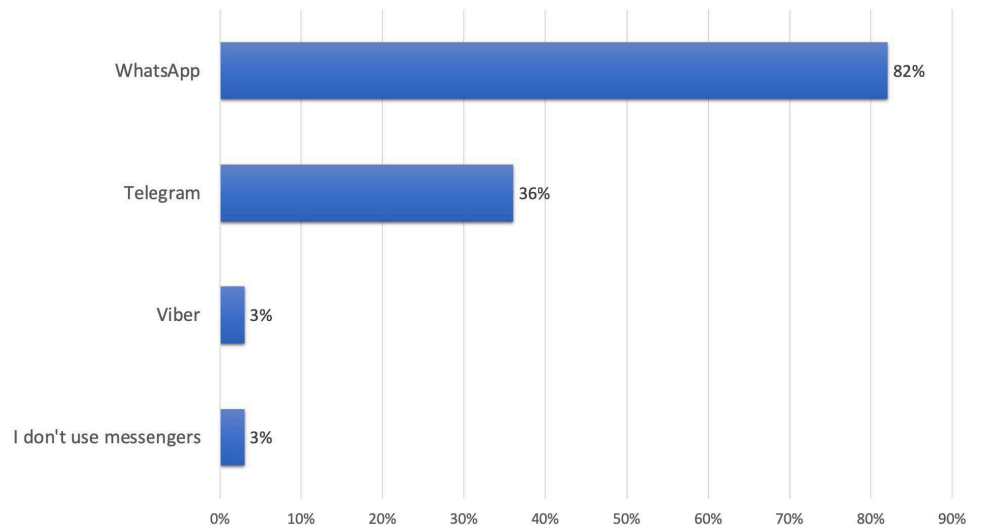
“ The use of both WhatsApp (58%), Telegram (39%) is linked with age; the older the respondent, the less he/she uses messengers ”

The use of both WhatsApp (58%) and Telegram (39%) is linked with age; the older the respondent, the less he/she uses messengers as seen in table 3 above. The difference is especially significant for Telegram: 64% of 18–24-year-old respondents use it, while only around 13% of the 55+ group use it. People in urban areas in Central Asia use messengers slightly more than those who live in rural areas.

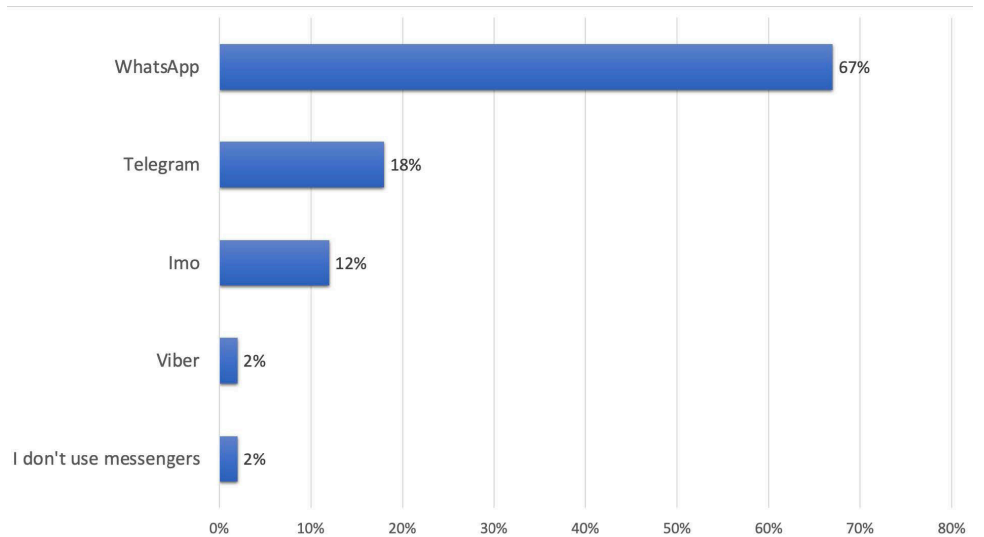
Graph 12. Messengers in Kyrgyzstan



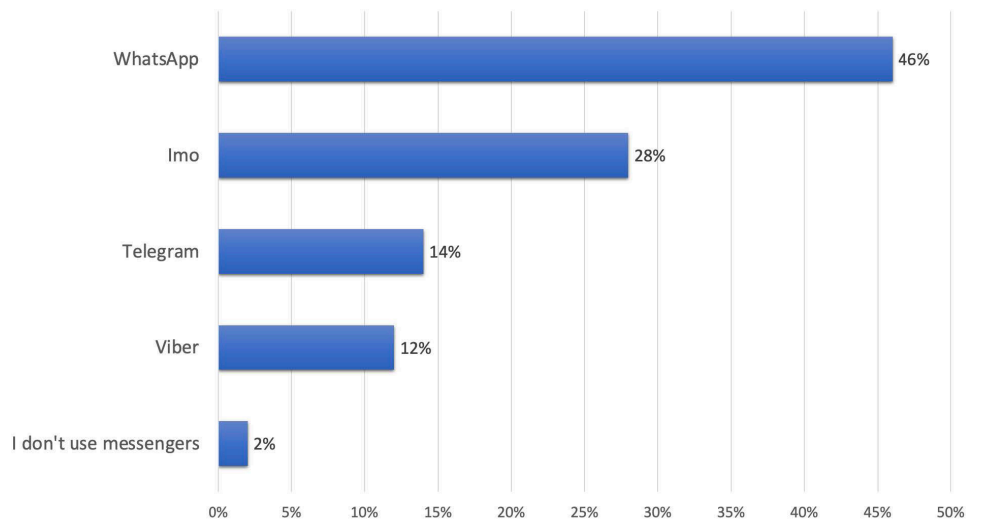
Graph 13. Messengers in Kazakhstan



Graph 14. Messengers in Uzbekistan



Graph 15. Messengers in Tajikistan



“ a large component of respondents simply don't pay attention to the names of bloggers, accounts, or people, and watch anything that comes to their feed ”

Consumers were also asked to rank the top 3 accounts, people, or blogs that they follow for news from the social media platform they use. The general feedback is that a large component of respondents simply don't pay attention to the names of bloggers, accounts, or people, and watch anything that comes to their feed (algorithmically and in terms of instant preference, as opposed to based on names/known-accounts).

During the survey, respondents in Kyrgyzstan were extremely divided in their answers and provided around 140 different accounts or people's names they follow for the news. Azattyk or Radio Liberty was mentioned 54 times, Akipress 23 times, Kaktus Media and News.kg 40 times each, super.kg was mentioned 20 times. In Kazakhstan respondents named around 213 different names of blogs, websites, and people. Among the ones which got the most mentions are Tengrinews (58 times); ZTB (20 times), Nur.kz (19 times), Kaznews (17 times). In Uzbekistan 114 different names of blogs, people, and media were mentioned. Kun.uz was mentioned 74 times, Qalampir.uz was mentioned 38 times and daryo.uz was mentioned 23 times. In the case of Tajikistan, 47% of respondents were not asked because they indicated that they do not use the internet to get news. Radio Ozodi and Asia Plus were among the most popular mentions.

3.2 Language Preferences in Media

“ Across Central Asia, 75% of the survey respondents say that they use local languages to obtain news. The Russian language, however, continues to hold a significant share with 55% ”

Across Central Asia, 75% of the survey respondents say that they use local languages to obtain news. The Russian language, however, continues to hold a significant share with 55% of respondents mentioning that they use Russian language when reading and watching the news. Respondents in urban and rural areas significantly differ in Russian language preferences: 66% of respondents from urban areas use Russian for reading the news, while the number for rural respondents is visibly smaller at 42%. The same difference in Russian language preference can be seen when comparing the level of education. Respondents with higher levels of education are more likely to obtain news in Russian compared to respondents with lower levels of education: 68% against 46% respectively.

In Kyrgyzstan respondents prefer obtaining news in Kyrgyz language, which was mentioned by 79% of respondents, Russian language was the second most popular choice at 49%. Age is not a major factor in determining Russian language preference in these cases. An absolute majority of respondents (70+%) prefer the local language. Generally, people with lower income prefer significantly more to obtain news in the Kyrgyz language. Respondents from urban areas are more reliant on news in the Russian language than those in rural areas. The difference is especially noticeable in watching the news: urban respondents are 20% more likely to watch the news in Russian, while the number of rural respondents who watch the news in Kyrgyz are 14% more than their urban counterparts.

“ Kazakhstani respondents demonstrated an opposite trend compared to Kyrgyzstan ”

Kazakhstani respondents demonstrated an opposite trend compared to Kyrgyzstan. 75% of respondents obtain news in the Russian language, while the Kazakh language was chosen by only 54% of respondents.

Both older respondents and younger respondents obtain news by a significant majority (82-85%) in Russian, while for younger respondents it's 73%. 84% of respondents from urban areas mentioned that they read the news in Russian, which is more than 20% in frequency compared to respondents from rural areas at 63%.

“ Among Uzbekistanis there is a bigger distinction between Uzbek and Russian language preferences. 88% of respondents obtain news in Uzbek, while only 34% mentioned that they read news in Russian ”

Among Uzbekistanis there is a bigger distinction between Uzbek and Russian language preferences. 88% of respondents obtain news in Uzbek, while only 34% mentioned that they read news in Russian. Regarding gender differences, male respondents are slightly more likely to read news in Russian compared to women at 38% versus 30%. A bigger difference can be observed when comparing respondents living in urban areas compared with rural areas. In urban areas, 44% of respondents obtain news in Russian, while in rural areas the number is 22% (concerning reading). Similar trends can be noticed among the proportion of people with higher and lower levels of education: 47% (higher education-Russian) against 28% (lower education-Russian) respectively.

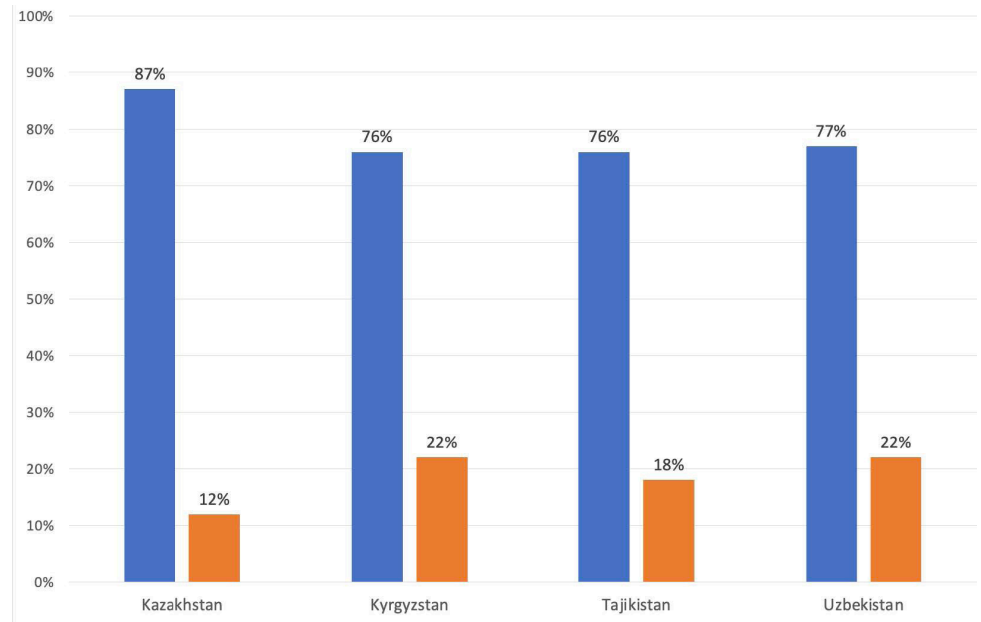
“ in Central Asia around 80% of respondents said that they have access to information about world events in their own language, while the remaining 20% said that such information is not available ”

The number of Tajikistanis who prefer to obtain news in Russian is 53%, which is higher than in Uzbekistan. Tajikistani is the most preferred language with 84% of respondents mentioning it as their main language for reading news, and 15% of respondents also mentioned they prefer to read in the Uzbek language instead. Interestingly older respondents prefer more to obtain news in Uzbek compared to younger groups: 24% against 13%. The Russian language is more frequently used to obtain news in urban areas (68%) than in rural areas (45%). A bigger discrepancy is noticeable when comparing levels of education. 74% of educated respondents obtain news in Russian, while the share of their counterparts with lower levels of education is 46%. Respondents with a higher income use Russian language for obtaining news slightly more frequently than respondents with a lower income: 64% to 51%.

Therefore, we can tentatively say that the use of Russian language in obtaining news may correlate with the socio-economic status of respondents.

When it comes to access to information, in Central Asia around 80% of respondents said that they have access to information about world events in their own language, while the remaining 20% said that such information is not available.

Graph 16. Access to information in native language per country



As seen in graph 16 the majority of respondents in Kyrgyzstan are satisfied with the level of access to information about world events in their own language (76%), while 22% stated that such information was not available to them.

An overwhelming majority of respondents from Kazakhstan (87%) state that they have access to information about world events in their native language, with only about 12% of respondents stating the opposite. Among them, women were slightly more satisfied (91%) with access to such information than men (80%). Respondents from urban areas were also slightly more likely to say that access was not a problem (91%), in contrast to rural, where around 20% of respondents said they have such a problem.

“ The majority of respondents (77%) in Uzbekistan said that they had no problem accessing information about world events in their native language. However, 22% were of the opposite opinion and require more information about world events in their native language ”

The majority of respondents (77%) in Uzbekistan said that they had no problem accessing information about world events in their native language. However, 22% were of the opposite opinion and require more information about world events in their native language. There are no major differences according to gender, city/village, education level, income level, preferred language of media consumption, and sources of information.

In Tajikistan, the majority of respondents (76%) said that they had no problem accessing information about world events in their native language. Only 18% were of the opposite opinion. Those who prefer to watch, listen to, or read news in Uzbek face slightly more difficulty in accessing information about world events: 56% said they had no access problems, while 38% said the opposite.

3.3 Trust in Media and Fake News

The overall picture in Central Asia demonstrates that the population varies in trust towards state media with 33% of respondents completely

“ Urban residents are less trustful towards state media ”

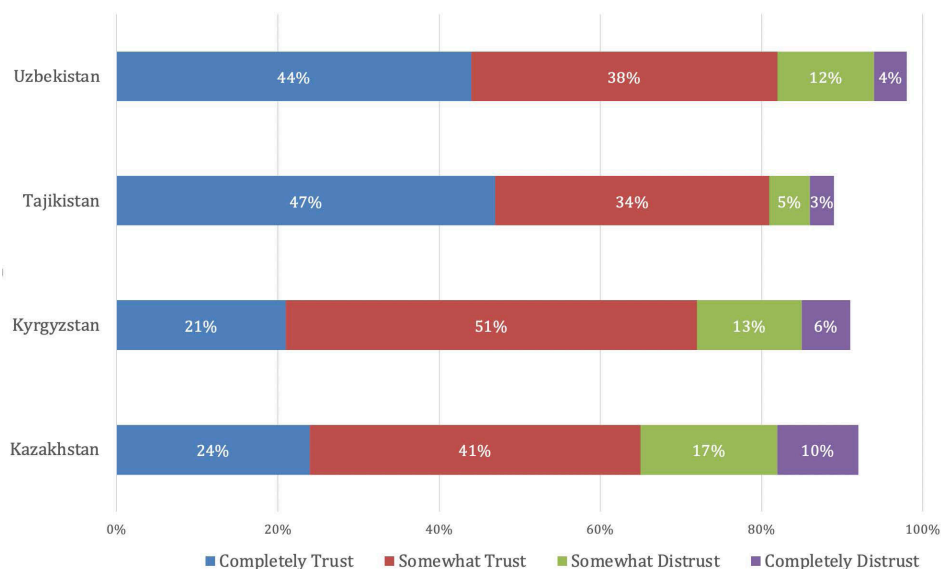
“ There is a difference between urban and rural attitudes towards state media: the former tend to be less trustful with 19% responding that they “Completely trust” versus 32% in rural areas ”

“ In Kyrgyzstan respondents are more cautious when expressing full trust towards state media ”

“ Tajikistani respondents are more cautious about information from non-state media with 30% of them completely distrusting it compared to other countries: Uzbekistan (24%), Kazakhstan (17%) and Kyrgyzstan (13%) ”

trusting state media and 41% expressing moderate trust. 43% of the most trustful respondents come from the 55+ age group which is higher compared to the 18-40 age group of which 30% completely trust the state media. Urban residents are less trustful towards state media with 28% of them completely trusting it, while rural respondents constitute the bigger share: 39%. Urban respondents tend to express complete distrust towards state media more frequently with 8% compared to 4% of rural respondents.

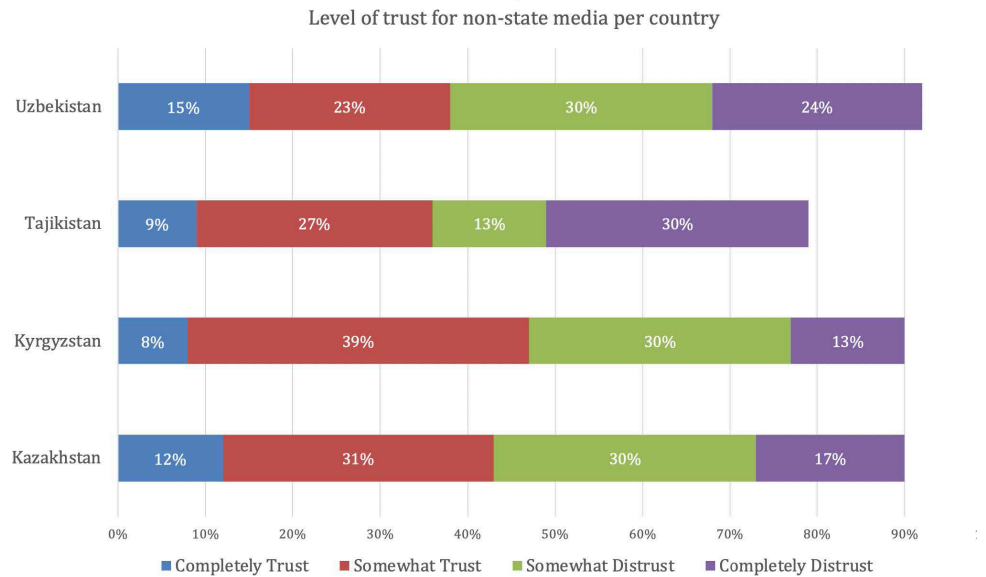
Graph 17. Level of trust in state media per country



As can be seen in graph 17, Tajikistan has the highest share of respondents with a complete trust towards state media (47%). In Uzbekistan 44% of respondents expressed a complete trust towards state media, while 38% have a more moderate level of trust (“Somewhat trust”). 24% of respondents in Kazakhstan expressed complete trust towards state media, while the majority of Kazakhstani respondents cautiously expressed their trust towards state media with 41% of them “somewhat trusting” the state media. There is a difference between urban and rural attitudes towards state media: the former tend to be less trustful with 19% responding that they “Completely trust” versus 32% in rural areas. In Kyrgyzstan, respondents are more cautious when expressing full trust towards state media. The majority of them (51%) said that they only somewhat trust the state media, while 20% of respondents expressed a complete trust towards state media.

When it comes to levels of trust towards non-state media: 21% of respondents in Central Asia completely distrust non-state media, while 31% somewhat trust non-state media. Tajikistani respondents are more cautious about information from non-state media with 30% of them completely distrusting it compared to other countries: Uzbekistan (24%), Kazakhstan (17%) and Kyrgyzstan (13%).

Graph 18. Level of trust in non-state media per country



Generally, in Kyrgyzstan, respondents did not express extreme levels of trust or distrust towards non-state media. Only 8% said that they completely trust non-state media and 13% expressed total distrust. The majority of respondents, however, lingered on neutral positions with 39% choosing “somewhat trust” and 30% picking “somewhat distrust”.

Unlike state media, the views regarding non-state media in Kazakhstan are distributed as follows: 30% “somewhat distrusting” non-state media and 17% “completely distrusting” it. Respondents with Russian language preferences are less “completely trusting” towards non-state media compared to those with Kazakh language preferences (e.g. 8% to 17% respectively, within the section “Reading the news”) which indicates that language-preference correlates with trust/dis-trust concerning non-state media.

Non-state media is less trustworthy in Uzbekistan compared to their attitudes towards state media. Only 15% of the respondents completely trust non-state media. On the other hand, 30% of respondents “somewhat distrust” non-state media and 24% express “complete distrust”. Respondents with higher levels of education are slightly less likely to express extreme levels of distrust towards non-state media with a number of 16%, compared to respondents with lower levels of education, at 28%, who tend to completely distrust non-state media.

Non-state media is considered not trustworthy by 30% of respondents in Tajikistan. However, 27% of respondents “somewhat trust” non-state media. This can partially be explained by considering levels of education. About 35% of more educated respondents somewhat trust non-state media, which is higher compared to respondents with lower levels of education at 22%.

“ Respondents with Russian language preferences are less “completely trusting” towards non-state media compared to those with Kazakh language preferences (e.g. 8% to 17% respectively, within the section “Reading the news”) which indicates that language-preference correlates with trust/dis-trust concerning non-state media ”

3.4 Perceptions about Ukraine and other Global Events

The survey questions dedicated to the respondents' views about the situation in Ukraine and related news consumption patterns were asked only in Kyrgyzstan and Kazakhstan. Due to the sensitivity of the topic, it was decided to avoid asking questions about Ukraine in Tajikistan and Uzbekistan.

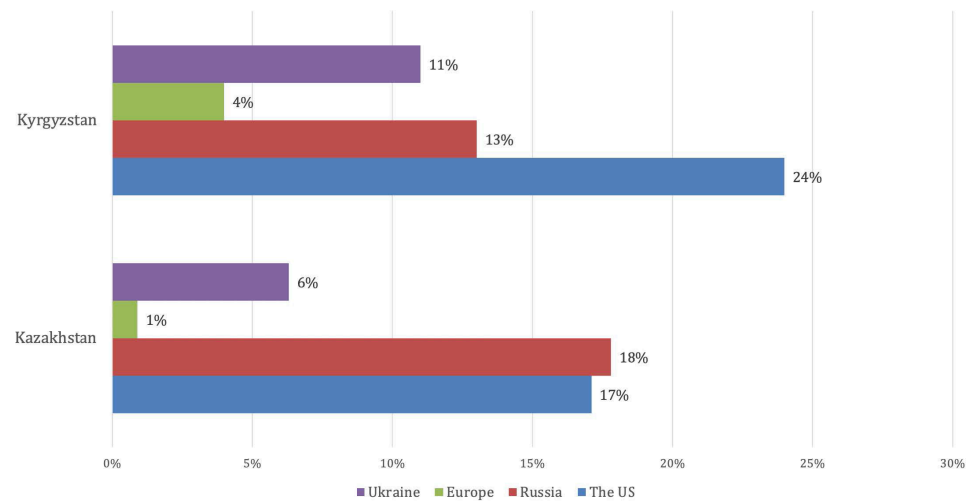
“ In Kyrgyzstan, a quarter of respondents blame the US for the situation in Ukraine (24%), while 13% of all respondents declared that Russia is to be blamed ”

“ older generations are much more likely to blame the US for the situation in Ukraine ”

“ Young people (in Kyrgyzstan) aged 18-25 hold a different view: one-third of young respondents blame Russia, while 8% attribute the blame to the US, and the same percentage to Ukraine ”

“ Among those who use Russian television channels half of the respondents put the blame on the US, while consumers of domestic television channels and users of social media are less inclined to hold the US responsible for the situation in Ukraine ”

Graph 19. Who is to blame for the war in Ukraine?



In Kyrgyzstan, a quarter of respondents blame the US for the situation in Ukraine (24%), while 13% of all respondents declared that Russia is to be blamed, while 11% blame Ukraine. A small number of people also blamed Putin, Zelensky, both sides of the war or the EU (graph 19). Interestingly, older generations are much more likely to blame the US for the situation in Ukraine, since around half of those surveyed in the 55-64 and 65+ age brackets held this view.

Young people aged 18-25 hold a different view: one-third of young respondents blame Russia, while 8% attribute the blame to the US, and the same percentage to Ukraine. In general, an inverse proportion can be observed in the age-number of those who blame the US and those who blame Russia: the number of the former increases with the age of the respondents, while the number of the latter decreases.

There is also a significant difference between respondents who use different sources of information: Among those who use Russian television channels half of the respondents put the blame on the US, while consumers of domestic television channels and users of social media are less inclined to hold the US responsible for the situation in Ukraine.

The use of domestic or Russian sources about events outside of Kyrgyzstan does not have a major impact on who people believe is responsible for the situation in Ukraine. However, social media users are less likely to believe that the US is to blame (22%) and slightly more likely to believe that Russia is to blame (15%) than Russian television users (40% for the US and 8% for Russia). No major difference is observed between users

“ In Kazakhstan, respondents are more likely to blame Russia (18%) rather than the United States (US) (17%) for the events in Ukraine, while only 6% said Ukraine was to blame ”

“ social media users (in Kyrgyzstan) are less likely to believe that the US is to blame (22%) and slightly more likely to believe that Russia is to blame (15%) than Russian television users (40% for the US and 8% for Russia) ”

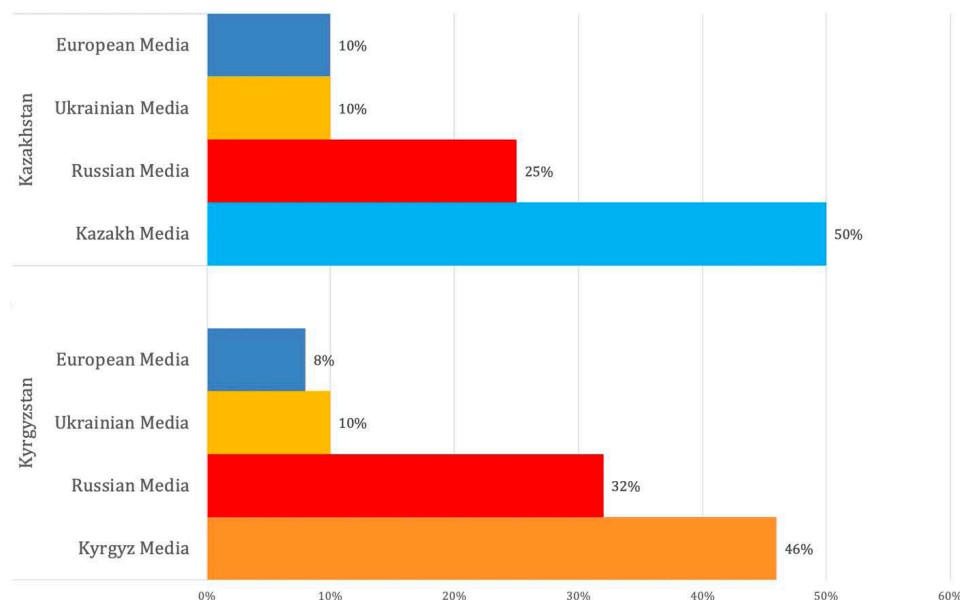
“ those (in Kazakhstan) who prefer Russian channels for information tend to blame the US more than Russia for the situation in Ukraine ”

“ Young people are much less likely to use Russian media and prefer Kyrgyz media ”

of Kyrgyzstan and Russian television stations.

In Kazakhstan, respondents are more likely to blame Russia (18%) rather than the United States (US) (17%) for the events in Ukraine, while only 6% said Ukraine was to blame. However, those who prefer Russian channels for information tend to blame the US more than Russia for the situation in Ukraine. In more detail about the sources of news about the situation in Ukraine: Russian media audiences are more likely to blame the US (36%) or Ukraine (13%) than Russia (10%). At the same time, the situation is the opposite with consumers of Ukrainian and European media: about half of the respondents from each cohort blame Russia and only about 15% of the US, which indicates the importance of what news sources are used by respondents.

Graph 20. Sources of information about the war in Ukraine and other global events



When asked about what sources respondents in Kazakhstan and Kyrgyzstan use to obtain news about the situation in Ukraine and other global events (graph 20), Kyrgyzstani respondents claim that they predominantly use Kyrgyz (46%) and Russian media (32%). Ukrainian or European media are used by 10% and 8% respectively. Young people are much less likely to use Russian media and prefer Kyrgyz media. In the age categories of 18-24, 25-34, and 34-55 the percentage of users of Russian media does not exceed 25%. In the 55-64 and 65+ age categories respondents are almost twice as likely to use Russian media.

More than half of the respondents from Kazakhstan give preference to domestic media for information on events in Ukraine, while a quarter of the respondents prefer Russian media. A small number of respondents (10% in each cohort) prefer European or Ukrainian media. There is also a marked difference among different generations: the younger the respondent, the less likely he or she is to be a consumer of Russian television channels.

“ More than half of the respondents from Kazakhstan give preference to domestic media for information on events in Ukraine ”

“ in Kyrgyzstan about half of the respondents (56%) are satisfied with the availability of information about the events in Ukraine in their native language, while a significant portion of 29% of respondents stated their dissatisfaction ”

“ respondents (in Kyrgyzstan) who prefer Russian television channels are slightly more satisfied with the availability of information about events in Ukraine in their native language than the consumers of domestic channels. The latter is slightly more dissatisfied with the availability of such information in their native language ”

Regarding whether respondents receive enough information about the current situation in Ukraine in their native language, in Kyrgyzstan about half of the respondents (56%) are satisfied with the availability of information about the events in Ukraine in their native language, while a significant portion of 29% of respondents stated their dissatisfaction.

There are no significant variations among different age groups, nor are there differences according to gender, urban-rural divisions, educational level, and/or socio-economic circumstances. Also, no differences were observed in terms of preferred language of media consumption and source of news about events inside the country. However, there is a slight difference depending on the source of information about events outside Kyrgyzstan. For example, respondents who prefer Russian television channels are slightly more satisfied with the availability of information about events in Ukraine in their native language than the consumers of domestic channels. The latter is slightly more dissatisfied with the availability of such information in their native language.

In Kazakhstan about 70% of respondents said that information about events in Ukraine was available to them in their native language. The opposite view was held by 15% of respondents who require more information in their native language. There were no significant differences by gender, rural-urban division, education level, income level, preferred language of media consumption, and sources of information.



| Chapter 4 |

Qualitative Analysis

“ In the qualitative component of the study, the research team conducted a total of 360 in-depth interviews ”

In the qualitative component of the study, the research team conducted a total of 360 in-depth interviews. The interview respondents included four categories: media consumers, content producers, representatives of CSOs and representatives of policymaking institutions. Tables 4 and 5 show the distribution of interviews across the countries and target groups.

Table.4 Distribution of interviews with media consumers

Country	Gender		Age		Language	
	Women	Men	Under 40	55+	Local	Russian
Kazakhstan (60 interviews)	34	26	30	30	30	30
Kyrgyzstan (60 interviews)	37	23	30	30	30	30
Tajikistan (60 interviews)	32	28	30	30	32	28
Uzbekistan (60 interviews)	35	25	30	30	30	30

Table 5. Distribution of expert interviews

Country	Content producers		Civil society		Policymakers	
	Women	Men	Women	Men	Women	Men
Kazakhstan (30 interviews)	6	4	6	5	8	5
Kyrgyzstan (30 interviews)	7	3	9	1	6	4
Tajikistan (30 interviews)	5	5	8	2	5	5
Uzbekistan (30 interviews)	8	2	5	5	3	7

“ The primary purpose of in-depth interviews was to enrich the survey's findings through learning meanings that respondents attribute to various choices concerning media landscape, media content consumption, disinformation, and related topics ”

Respondents among media consumers were recruited through a snowball technique, with the research teams instructed to ensure gender balance (women should not be less than 50% of the sample) and age balance (about 50% for each of 18-40 and 50+ age categories). In turn, expert interviews followed a purposive sampling as the respondents had to be recruited among three specific target groups: content producers, civil society, and policymaker.

The primary purpose of in-depth interviews was to enrich the survey's findings through learning meanings that respondents attribute to various choices concerning media landscape, media content consumption, disinformation, and related topics.

4.1 General Media Consumption

What are the main devices that Central Asians use to access media, and what are the reasons for their choices? The in-depth interviews strongly support the survey findings (discussed above) on the prominence of smartphones as the primary digital media consumption tool for Central Asians. It is safe to say that the mobile device, referred to by respondents either as a phone and/or smartphone, has become a platform of choice across all countries.

In contrast, other devices are mostly reported to be used in specific environments, such as offices (computers), homes (television), or cars (radio).

Two factors stand out as explanations for the preferences for smartphones. The first and most important reason is convenience of use. The versatility of smartphones, as respondents stress, means they can be used anywhere and anytime. In contrast, the use of other devices is limited to specific environments, such as offices and daytime (computers), homes and evenings (television), or cars (radio).

“I don't stay at home 24 hours a day. For example, I might be on a plane, I don't know, I might be on the road, and I'll use my smartphone. I can say that I don't watch television at all. We used to watch television before. Now everything that is news appears on Instagram, in stories, on the YouTube channel. (Female, 55 years, Kazakhstan)”.

The second factor, perhaps more pertinent to Central Asia than many other regions, is the sense of freedom people have in terms of choosing the media content they consume. Many respondents list specific bloggers, Telegram channels or Instagram accounts or "publics", showing a deliberate choice of what they choose to consume. In turn, other platforms, particularly television, are seen as limiting not only in terms of timing (evening news is only aired in the evenings) but also content (seen as curated by the authorities).

“On television and radio broadcasts, only certain aspects are usually covered, information is presented one-sidedly,

“ With television and radio, it is impossible to do fact-checking ”

“ people in their 20s report almost no use of devices other than smartphones ”

“ When asked about the media preferences of their older family members, younger respondents point to the difference between their parents and grandparents ”

“ The proliferation of the internet in the region will gradually lead to traditional television to be replaced by Internet-fuelled “smart television”, meaning television will not be limited to conventional broadcast channels ”

so I am not inclined to believe this. To understand what to trust more, you need to analyse several points of view at once. With television and radio, it is impossible to do fact-checking. (Male, 34 years, Uzbekistan)”.

Although the preference for smartphones is strong, there is a clear distinction in how people use them. Age is a critical variable, which determines usage. Television for older generations is both more familiar and acceptable content-wise (e.g. Soviet-time movies). Many in their 60s or 70s simply do not own a smartphone or combine with other devices, mainly television. Those who have smartphones are reported to be "just learning" how to use them. In contrast, people in their 20s report almost no use of devices other than smartphones.

“I am not subscribed to pages. I am already old so [my daughter] installed an Instagram for me and just out of interest I flip through the pages of those people who are subscribed to me and to which I am subscribed, that's all. (Female, 60, Kyrgyzstan)”.

The age contrast, however, is blurring. If a decade or more ago, there was a clear distinction between the older “Soviet-time” generation and younger “post-Soviet” generation, such contrast is less evident today. When asked about the media preferences of their older family members, younger respondents point to the difference between their parents and grandparents. The former, in their 50s or 60s, are more likely to use the internet and smartphones than the latter, 60s or older. So, although the mention of "older people watch television more" is widespread in the region, the definition and characteristics of the "older generation" appear to be shifting.

“Grandparents are elderly now [but] they got a phone, and now they also use the phone for the most part, and they look for information mostly on Facebook. (Female, 28 years, Tajikistan)”.

The survey results above demonstrate that television and social media are two dominant sources of news. Qualitative interviews support those findings but also suggest the trend is for smartphones, rather than television, to grow, and fusion of content accessed through television and smartphones. The proliferation of the internet in the region will gradually lead to traditional television to be replaced by Internet-fuelled “smart television”, meaning television will not be limited to conventional broadcast channels. Furthermore, the convenience of a smartphone as a gadget combined with accessible internet has already pushed other media platforms, such as television channels and newspapers, to tailor their content to mobile devices. As one respondent said, there is no question of choosing between television and a phone because "you can watch television programs on the smartphone anyway."

Media consumption: sources of news

Responses concerning the sources of news suggest three patterns. First, those using Internet-based platforms (smartphones and computers) heavily rely on social media and messaging apps. The survey data provide more valid information on country differences, but the in-depth interviews suggest Telegram is particularly prominent in Uzbekistan. Facebook and YouTube are strong in Kazakhstan, Kyrgyzstan, and Tajikistan, while Instagram emerges prominent across all countries. Commenting on their younger family members, many respondents also mentioned TikTok. In turn, WhatsApp is also mentioned as important, but more in the context of news sharing and receiving news from specific communities (e.g. WhatsApp groups).

“ If a few years ago, the news websites threatened more traditional television and newspapers, now the same websites appear under pressure from individual content producers ”

The above describes platforms for content, but what about specific media sources whose content respondents consume? This leads to the second pattern: a growing diversification and "democratisation" of content production. If a few years ago, the news websites threatened more traditional television and newspapers, now the same websites appear under pressure from individual content producers. More established news agencies are still prominent, such as Kloop, Azattyk (Kyrgyzstan), Asia-Plus, Ozodi (Tajikistan), Khabar or Tengrinews (Kazakhstan), or Gazeta.uz, Kun.uz (Uzbekistan), or Current Times/Nastoyashee Vremya across all countries. That said, there is a strong presence of individual content producers as preferred news sources, referred to variously as bloggers, accounts, publics, or "individual reporters." These include foreign sources (e.g. personal channels of Dud', Varlamov, Sobchak, and others) and, to a lesser extent, domestic bloggers and opinion leaders.

“I am now reading what happened in 2013, 2014, and 2016 when I did not have access to information. I follow a lot about politicians who have died. For example, about Boris Nemtsov, I spent a lot of time listening to all the information. It's also about getting information. I probably spent 10 hours on him and watched all his interviews. (Male, 37 years, Kyrgyzstan)”.

“ Those who have these views tend to be the older generation and those living in villages or smaller rural towns rather than capital cities ”

Third, the contrast between state-owned versus independent media remains strong. Some respondents, particularly the older generation, maintain respect towards "official" sources, most often in the form of state-owned television channels. This could partly stem from the broadest geographic reach that the state television channels have. However, respondents also speak about the belief that the state-owned media have properly verified and reliable news. Those who have these views tend to be the older generation and those living in villages or smaller rural towns rather than capital cities. Interestingly, some respondents said state media is reliable but mainly on "factual" information, including for example: "what happened where," "who visited the country," and so on. The high degree of overlap between television and official media in responses also reminds us how weak or non-existent private television is in the region.

“ I basically do not watch local Kazakhstani television channels or television programs ”

The above group contrasts those who dismiss state media as inherently unreliable and biased. While Kyrgyzstan and Kazakhstan respondents show a greater preference for non-state media, the country differences appear negligible regarding the younger generation. The quote from a respondent in Kazakhstan encapsulates the common scepticism regarding official media (as well as the perception of a strong convergence between state media and television) among younger and middle-aged age groups.

“I basically do not watch local Kazakhstani television channels or television programs. I think that in our country, there is very strong censorship and all television channels are state-owned in one way or another, so the information they provide to people is "corrected" in advance. (Male, 36 years old, Kazakhstan)”.

4.2 Language Preferences in Media

Media consumers in Central Asia primarily consume media content either in native language, Russian or, in rarer cases, English. Importantly, there are two groups of media consumers: those who only use one language and have no command in other languages, and those who can use two or more languages. This study's in-depth interviews suggest three important points, which is an important addition to the quantitative survey.

First, the presence of many one-language users creates a problem of 'compartmentalised communities' who consume non-overlapping content. To complicate the picture, a respondent in Uzbekistan pointed to a widening gap between Uzbek-language users, with the younger generation who read Uzbek in Latin and the older generation who use Cyrillic. The following quotes below illustrate the point.

“ People who read in one language may not read in another, and vice versa. Sometimes it seems as if these are two different worlds. The overlaps between them are weak ”

“In general, there is a gap between Uzbek-language and Russian-language media. People who read in one language may not read in another, and vice versa. Sometimes it seems as if these are two different worlds. The overlaps between them are weak. And even with established media that may have several languages, editions of languages, or translate materials, there are few intersections. This is a fact that, in my opinion, needs to be corrected in order to consolidate society. (Content producer, Uzbekistan)”.

“Unfortunately, in our society there is very different content in Russian and Kazakh and there is very little content that would duplicate information. That is, we can see some topics discussed in the Kazakh language are (not always, but mostly) more conservative things, such as issues of “uyat” (shame) and other things. In Russian, the topics discussed are slightly different... (Civil society representative, Kazakhstan)”.

Second, bilinguals who speak the native language and Russian often

“ Another reason for opting for Russian is the richer media content, compared to more local language content, including qualitative standards ”

“ some suggest this might be the implication of Russia’s war of aggression against Ukraine, which reinvigorated the processes of national identity-building, while others speak about domestic political developments ”

report they prefer Russian when it comes to media consumption. One reason is the level of comfort in using Russian. In some cases, this stems from the level of language command of media consumers. In other cases, respondents are not content with the use of native language by content producers. Either way, these respondents find it easier to understand content in Russian than native/local language. The following quotes are illustrative of these views and indicate a degree of preference towards Russian languages across the region, despite the clear change in usage trends.

“I speak Russian and Uzbek. But Russian has been more familiar to me since Soviet times. This is not my best quality. In Uzbek, I perceive information, but not as fast as in Russian. (Female, 62 years, Uzbekistan)”.

“I read and watch the news in both languages but more in Russian. I would say words are clearer and more understandable in Russian. There is not much specificity in the Kyrgyz language. (Female, 28 years, Kyrgyzstan)”.

Another reason for opting for Russian is the richer media content, compared to more local language content, including qualitative standards. Local language media is often limited to domestic news, while Russian (or English) allows more diverse, expansive and in-depth analysis. One may also add that stifled freedom of expression also creates incentives for greater media consumption in a non-native language. Overall, the responses suggest that native Central Asian languages, while possibly prominent at the household level and increasingly popular, often happen to be second-choice options in media consumption due in part to lacking qualitative content.

The third observation concerns change in language across media, since there is a strong region-wide trend about the growing role of local language in the country’s media space. This is equally observed in countries where the local language is seen as a smaller market compared to Russian (Kyrgyzstan and Kazakhstan) and a bigger market compared to Russian (Uzbekistan and Tajikistan). The common point is about increasing demand for media content in the local language. The reasons however appear to vary: some suggest this might be the implication of Russia’s war of aggression against Ukraine, which reinvigorated the processes of national identity-building, while others speak about domestic political developments. For example, respondents in Kyrgyzstan who agree about an increasing volume of content in Kyrgyz relate the trend to the change in the government in 2020.

4.3 Trust in Media and Fake News

The proliferation of fake news made the subject of trust in the media and attitude towards disinformation a vital part of the study. Hence, the interviews sought not only to assess the awareness of media consumers with regards to this problem, but also gauge their interpretation of the nature and causes of disinformation and how they address it in their daily media consumption.

“ awareness of fake news is very high across all countries and age groups ”

Overall, the study finds that the awareness of fake news is very high across all countries and age groups. Terminology like “fake news” and “fakes” (e.g. transliterated, not translated terms) appear to be fairly well-known among respondents. Many interviewees show the ability to distinguish between sources of media they trust and distrust and have strong views on who stands to benefit from spreading false news and content. Three specific observations could be highlighted with regards to this subject.

“ Russian-language media are more exposed, at least because a vast part of media content, including disinformation, is in Russian ”

First, the interviews do not reveal the correlation between the language of media and fake news proliferation. This might partly relate to the fact that most respondents use one language for media and may not compare media in a different language. A respondent in Kyrgyzstan mentioned young people who speak Kyrgyz only are most likely to believe fake news. In contrast, another respondent suggested consumers of Russian-language media are more exposed, at least because a vast part of media content, including disinformation, is in Russian. Overall, as expert interviews also suggest, the fake news industry has grown sophisticated enough to create tailored content for specific groups.

“ While the view of political and economic roots of fake news is widespread, several respondents also stressed that one root cause of the problem is the ease of producing and spreading a piece of news ”

Second, Central Asian media consumers primarily see the roots of fake news in politics and economics, and a few also see it as a "handiwork of idlers." Those who see this as a political problem mainly point to authorities (particularly explicit in Kyrgyzstan and Kazakhstan) and politicians/ political groups as being behind fake news. This equally applies to foreign governments, with the Russian government particularly prominent in the context of Russia's war of aggression against Ukraine. On the question of why governments or politicians would want to spread misinformation, the respondents suggest four interests, or four “Cs”: convince people, calm down people, confuse people, and overall, control people. There are also mentions of fake news used to slander political opponents and or the government. The latter believe that fake news is spread by the "enemies of the people" and those working "against the state."

Other responses on reasons for fake news point to economic or commercial interests. Some refer to the need for popularity by either media or celebrities in social media. Others point to scammers of various sorts, who create misleading titles that lead to suspicious websites. While the view of political and economic roots of fake news is widespread, several respondents also stressed that one root cause of the problem is the ease of producing and spreading a piece of news. In other words, anyone can spread any information for any reason because it is technically easy nowadays.

“It seems to me that the information in the media is now so scattered, because everyone is in search of hype, everyone is in search of some kind of popularity. I think it's...fake information is like a source of such popularity for some people. (Female, 31 years old, Kazakhstan)”.

“ A common characteristic that makes them more vulnerable, based on interview responses, is the lack of critical thinking and the inability to double-check or verify the information ”

The third point worth mentioning is the wide range of definitions respondents have when speaking of "fake news." While most define it as any factually untrue information, there is a reasonably frequent view of fake news as any "clickbait" information with misleading titles leading to other websites. Some respondents speak of commercials as examples of false information. Finally, there is a broader dimension when respondents dismiss state media as a priori fake news, accusing them of spreading certain narratives and ideologies. Thus, while the awareness of fake news is relatively high, responses suggest a wide range of definitions and diverse descriptions of what qualifies as fake news.

Fourth, the study finds four categories of the population which can widely be described as the most likely victims of disinformation: the elderly, the younger generation, people with no/low level of education, and rural populations. A common characteristic that makes them more vulnerable, based on interview responses, is the lack of critical thinking and the inability to double-check or verify the information.

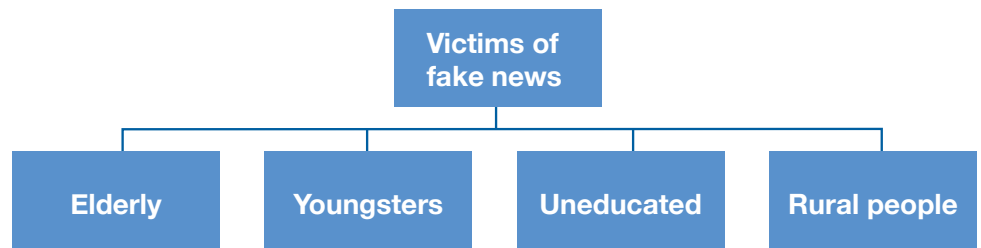
“ The most frequently mentioned category remains older people ”

The most frequently mentioned category remains older people. This group is believed to be an "easy target" for disinformation campaigns for several reasons, ranging from their (technical) inability to double-check the information to their "Soviet-time habits" of relying on information spread by state media. The second category is the opposite: young people who may be technically savvy but choose not to question or cross-check information. However, there are opposition views even with regards to this according to the interviewees. Thus, several respondents say older people benefit from life experience and wisdom that help them distinguish fake news from accurate information, while some firmly believe that younger people (with their technical skills) are less prone to become victims of false information. Illustrative of the above points is the following response on the victims of disinformation, which points out the vulnerability of older generations.

“I think, mostly old people, pensioners. They don't have access to a lot of information, and I guess they may accept and believe what someone says or sends them. So, older people. After that, young children, young people, a little hot-blooded. They may believe in and follow false information without investigating the root of the problem. (Male, 40 years, Kazakhstan)”.

“ Two other categories that are seen as easy targets of fake news are people with lower levels of education and residents of rural areas ”

Two other categories that are seen as easy targets of fake news are people with lower levels of education and residents of rural areas. These people are seen as less fluent in working with information, less likely to speak different languages, and have less access to more diverse sources of information.



“ references to dedicated websites or services on fact-checking are nearly absent ”

Finally, the study shows that media consumers, in general, all know about cross-checking as the single best way to decide whether the news is accurate or not. However, there are differences in what is understood as double-checking. When in doubt, some deliberately search for the same information in sources they know as reliable. Others rely on other users' comments or decide based on the number of views (in case of YouTube videos), and thirdly pay attention to the source of information. While none of these methods are particularly surprising, one can see that references to dedicated websites or services on fact-checking are nearly absent. What matters as a predictor of accuracy for many areas is the reputation of the source or the response of the crowd (e.g. "comments of other people" or "the number of views"), which also raises questions about the effectiveness of current methods to reach large groups of media consumers and support their debunking methods. Finally, some speak about personal judgement and/or experience as the best way to filter fake news, which equally indicates a particularly subjective way of handling fake news.

“ people said that Germany was in a crisis, and people only had water in the shower for four minutes. I was there this summer and saw nothing like that ”

“For example, when I was here, people said that Germany was in a crisis, and people only had water in the shower for four minutes. I was there this summer and saw nothing like that. People live there as usual. (Female, 28 years, Kyrgyzstan)”.

4.4 Perceptions about Ukraine and other Global Events

“ Those who point to Russia as being responsible often speak of Putin's own ambitions, Russia's land grabbing tendencies (e.g. Georgia), and/or wider imperial/colonial interests ”

One section of the study sought respondents' views on the coverage of sensitive political topics, with Russia's war of aggression against Ukraine and key domestic events as examples. The questions in this part overlap with the issues of trust in media and fake news, thus helping to confirm and enrich previous responses.

Overall, the respondents agree that Ukraine is the primary victim or a “tool in the conflict”. However, similarly to the quantitative survey, views diverge on which party is to blame for the war more specifically. Those who point to Russia as being responsible often speak of Putin's own ambitions, Russia's land grabbing tendencies (e.g. Georgia), and/or wider imperial/colonial interests. Some accuse Russia of attacking the

“ respondents who blame Russia more are found in Kazakhstan and Uzbekistan ”

neighbour even if acknowledging the geopolitical tension as the context. Alternative views point the finger at North Atlantic Treaty Organisation (NATO), the US, or Europe, largely following the lines of Russian media's narratives. There are also those who see Ukrainian nationalism as the cause, with reference to the plight of people in Donbass. Overall, women respondents tend to avoid expressing strong feelings about the party to blame, instead stressing how hard it is to hear or read about the war and sufferings on a regular basis. Finally, although different views can be found in each country, the respondents who blame Russia more are found in Kazakhstan and Uzbekistan.

Questions concerning the choice of media to follow Ukraine events show that people have grown very sceptical about news in general. Put differently, there is a strong view that no source can be entirely reliable, and that each party only shows one side of the story. This is the case even for those with strong opinions on which party to blame for the war. The accessibility of information in the Russian language, both from Russia and Ukraine, appears to be essential. Based on transcripts, one may conclude that Russia's war of aggression against Ukraine has contributed significantly to raising awareness in Central Asia about how any information reflects specific interests and biases overall.

A similar degree of distrust could be seen in comments on media coverage of important political events in the country. Whether it is the January 2022 events in Kazakhstan or border delimitation news in Kyrgyzstan, respondents believe that people need more reliable and impartial information. The responses here resonate with previous commentaries on how the governments are interested in only showing the public what they consider acceptable.

“ respondents agree that Ukraine is the primary victim or a “tool in the conflict”. However, similarly to the quantitative survey, views diverge on which party is to blame for the war more specifically ”

Finally, both Ukraine and domestic events highlighted the growing role of the internet in spreading diverse and alternative content via bloggers (particularly on Ukraine), non-state (various national services of Radio Liberty), or foreign media (such as Euronews, Current Times, etc.). Respondents from Kazakhstan repeatedly spoke of the internet shutdown during January 2022 events, which led to an information deficit and helped the government hide or manipulate information.



| Chapter 5 |

Conclusion and Recommendations

The quantitative (survey) and qualitative (in-depth interviews) sections of this study show that media consumption across Central Asia remains a dynamic market full of important trends. Technological, socio-economic, geo-political and demographic changes are among the many variables, which appear to be shifting the media consumption market across all four countries in question. While entirely summarising these trends and changes is far from possible, this paper wishes to conclude with a set of five final remarks, followed by three recommendation-sub-sections for 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.

“ Younger generations also display a higher degree of interest in both foreign and domestic news, including news about Ukraine and Russia ”

“ Fake news, whatever the sources are, are spreading primarily through the Internet and the need for better fact-checking and media-literacy is in high demand ”

“ Older generations may have difficulties with cross-checking pieces of information due to the lack of relevant technical skills ”

5.1 Five concluding remarks

1. The Internet has transformed the media space in Central Asia. The dominance of state-owned television 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 is helping this process, as younger generations nearly only rely on social media for information input. Younger generations also display a higher degree of interest in both foreign and domestic news, including news about Ukraine and Russia.

2. 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 disinformation spreading remain 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 and the need for better fact-checking and media-literacy is in high demand. It is also visible that younger generations show more trust in non-state media and have an interest in developing media-literacy skills.

3. Different categories of the 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 often lack up-to-date skills needed to double check the information they consume online. Rural people and groups of lower socio-economic income are also seen to have lower media literacy, making them easier targets of disinformation.

“ Demand for more trustworthy news is rising, while differences in terms of preference exist across different countries ”

“ there is strong evidence for the growing role of local Central Asian languages in the media ”

“ Taking into account Central Asia’s demographic growth rate and age-cone, it is logical to deduce that the future media consumer is entirely online ”

“ Produce more social media and online content that focuses on international news in non-Russian languages ”

4. The ongoing Russia’s war of aggression against Ukraine has had a strong impact on raising awareness amongst populations concerning 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 war. Despite that, it is statistically clear that a more balanced view of Russia’s war in Ukraine in Russian-language is needed. Demand for more trustworthy news is rising, while differences in terms of preference exist across different countries.

5. There is strong evidence for the growing role of local Central Asian languages in the 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.

5.2 Recommendations for Content Producers in Central Asia

The data of this study clearly shows that the average 18-to-35-year old media consumer is majority online. Taking into account Central Asia’s demographic growth rate and age-cone, it is logical to deduce that the future media consumer is entirely online. Differences exist between countries and the most important factors remain age, gender, geography, income and language when identifying media consumers and their preferences. However, as the study also demonstrates, the growth in social media consumption is likely to encapsulate all age groups in the upcoming two decades.

It is recommended that all Content Producers and Content-Producing CSOs from across the entire Central Asian region:

- 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.
- 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.
- Create 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.
- Produce more social media and online content that focuses on international news in Russian languages, especially among younger,

“ Produce more, while improving the quality and increasing the trustworthiness of social media and online content in local languages ”

“ Invest more in developing content tailor-made for the audience most vulnerable to disinformation ”

“ 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 ”

urban, and more educated communities. This is particularly relevant in the cases of Kazakhstan, Kyrgyzstan and Uzbekistan where the demand is highest.

- 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.
- Increase the amount of 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.
- 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.
- Produce more content for local television channels in local languages concerning domestic news, which targets older demographic groups in rural areas who don't rely on social media and messenger services for news consumption. The market is widest for this in Uzbekistan and Tajikistan, since more age groups consume television and don't rely on Russian television as much.
- Produce more content for social media, especially Facebook and Instagram in Russian-language so as to specifically target the more educated and socio-economically well-off segments of urban society. This is particularly relevant in the case of Kazakhstan.
- Develop a solid reputation for independent and non-state media outlets by increasing undisputed facts, figures, dates and practical information, since there is a high level of distrust towards media (and particularly non-state media).
- Develop and produce more analytical as well as entertainment materials in accessible formats by for example integrating international news and sports, or leisure, depending on the country and specific audience. This is particularly important for the case of Uzbekistan and Tajikistan.
- Develop and produce user-friendly tools that help identify basic forms of fake news and disinformation. There is demand for this across all countries in Central Asia.
- Invest more in developing content tailor-made for the audience most vulnerable to disinformation:
 - a. elderly (novices in using smartphones, very likely to depend on feed suggestions, require tailored vocabulary and degree of conceptual complexity),
 - b. young (apolitical, highly engaged with entertaining content, limited awareness of interest-laden nature of media content), and
 - c. rural (relatively less time spent on devices, often do not

... speak Russian or English, less technically savvy, require tailored vocabulary and degree of conceptual complexity).

- Develop and promote more analytical materials in accessible formats. Such content appears to be in deficit for the audiences that do follow news but end up hooked by one-sided information. Even though relatively small in size, the audience for such materials is likely to have greater influence on public discourse.
- Consider closer cooperation with other media through active cross-referencing, for instance. This will both introduce the user to new trustable sources and help solidify the reputation of the original media outlet.
- Develop stronger oversight on online advertising to remove click-bait headlines and links that the audience appears to take seriously before feeling cheated. Many media consumers are not aware of the intricacies of the advertising industry and may judge the media website based on the quality of advertisements.
- Expand content and improve the quality of content produced in local languages. Among audiences that are fluent in a Central Asian language and Russian, there is a strong pattern of preferring Russian for media consumption because of richer content and more accessible language/format. Hence, there is a niche for more and better-quality content in local languages. With a few exceptions, local language content appears to be dominated by yellow-press style content, pushing more informed people to seek content in Russian (and in fewer cases, English).
- Balance informative and polemic materials. Those who trust in state-owned media do so partly due to the habit from old times but partly because they expect official media to present factual information in a systematic way, while private sources (especially Internet-based news) is mostly about controversial topics. This suggests that more established media outlets may consider balancing opinion pieces with a more neutral content accounting for “what happened” to prevent developing a reputation of strongly opinionated and thus biased source.
- Develop and promote user-friendly content and tools on how to distinguish most important forms of fake news and disinformation. This is already being done through multiple civil society projects but the outreach would be far greater if media outlets were part of the efforts. Existing websites or YouTube materials on fake news or media literacy are mostly ad hoc content and thus will have limited views. Content producers’ main interest is producing and sharing content but they will benefit from promoting media and information literacy and, more broadly, critical thinking skills among the broader population.

“ Expand content and improve the quality of content produced in local languages ”

“ Develop and promote user-friendly content and tools on how to distinguish most important forms of fake news and disinformation ”

“ Produce more social media and online content, targeting primarily Russian-language consumers in Kazakhstan and Kyrgyz language consumers in Kyrgyzstan. In rural areas it is easier to target younger people in local languages, while urban media consumers demand better quality and more independent Russian-language news ”

“ Produce social media and online content for the 18-25 age group, which prioritises not only news and politics, but also other topics like sports, culture, leisure, and entertainment ”



It is recommended that all Content Producers and Content-Producing CSOs from Kazakhstan and Kyrgyzstan:

- Produce more social media and online content, targeting primarily Russian-language consumers in Kazakhstan and Kyrgyz language consumers in Kyrgyzstan. In rural areas it is easier to target younger people in local languages, while urban media consumers demand better quality and more independent Russian-language news.
- Produce more social media and online content aimed at the 35-55 age group (middle-age), as a result of Central Asia’s overall demographic cone and increased usage of online media within this age group. This group demands more news about Ukraine, as well as domestic and international news.
- Produce more social media and online content that is more easy to share via messenger platforms like WhatsApp.



It is recommended that all Content Producers and Content-Producing CSOs from Uzbekistan and Tajikistan:

- Produce social media and online content for the 18-25 age group, but equally focus on producing television content for all other age groups since both Uzbekistan and Tajikistan media consumers continue to primarily use television for news.
- Produce social media and online content for the 18-25 age group, which prioritises not only news and politics, but also other topics like sports, culture, leisure, and entertainment.
- Produce social media and online content and use Telegram (in Uzbekistan) and WhatsApp and IMO (in Tajikistan) to distribute such contents.
- Produce social media and both offline and online content, which reinforces the trust and awareness about the importance of social media usage. Methods for this can be the usage of facts, neutral event description, figures, sources/using well-known sources, and community building.

5.3 Recommendations for Development Agencies & Major Foreign Donors

The data shows a high age-related demand for new and more online content. This will be key to counter Russian disinformation, but equally to help Central Asia develop an independent media sector in their own languages. This is particularly relevant, due to Russia’s war of aggression against Ukraine, which further increases the need for major donors and development agencies to invest in increasingly accessible and young to middle-aged online consumers.

“ Increase funding and investment in media and content-production across the whole of Central Asia ”

“ Increase funding and investment in media/content-production ”

“ Increase funding and investment in cross-regional programs, which support EU, Turkish, Caucasus and Central Asia media cooperation, production and dissemination, including projects and fellowships for civil society, think-tanks, academics and journalists ”

“ 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 ”

It is recommended that Development Agencies and Major Donors (e.g. EU, US):

- 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-Türkiye-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), Türkiye and Central Asia would be useful to increase best practice exchanges among content producers and media actors.
- 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.
- Increase funding and investment in cross-regional programs, which support EU, Turkish, Caucasus and Central Asia media cooperation, production and dissemination, including projects and fellowships for civil society, think-tanks, academics and journalists.
- Increase funding and investment in existing local programs to support tailor-made content for audiences most vulnerable towards disinformation with a specific focus on age, the urban-rural divide and socio-economic income levels.
- Increase funding and investment in media/news content production across local languages with a specific focus on rural and lower-income areas (Tajik, Uzbek, Kazakh, Kyrgyz, as well as smaller minority languages).
- Increase funding and investment in user-friendly tools to help media consumers identify basic forms of disinformation/fake-news, while also supporting more iterative platforms which blend entertainment, sports, culture news with political news.
- Increase funding and investment in the development of more data-driven, reliable and trustworthy forms of independent news (e.g. community building).
- Increase funding and investment in ‘amateur influencers’, start-up media sites and bloggers, since media consumers are unlikely to remember or give importance to the names/identities of online users/accounts on social media.
- Support media organisations’ improvement of local language content and greater overlap between the content in local language and content consumed in Russian or English.

- Support media organisations and respective civil society initiatives in media literacy and countering disinformation. In doing this, the primary focus should be on measuring impact of actions, as some approaches may be more effective than others. Here it is very important to inform the public that punitive approach to tackling fake news is a high-risk approach as it endangers freedom of expression and can become a tool in the hands of governments.
- Support media organisations in transitioning into financially sustainable companies. Being an organisation independent of the government comes with severe economic challenges due to the overall precarious economic situation and the government's influence over private businesses.
- Support regular research and analysis on media consumption. The latter is not only a matter of market and business but also an important social and political phenomenon that requires research and understanding by relevant actors.

5.4 Recommendations for national governments in Central Asia

The data shows that heightened levels of disinformation is coming from abroad (e.g. Russia), which carries potentially destabilising effects on Central Asian societies. New forms of media literacy are urgently needed from Central Asian national, regional and local governments, including the promotion of media literacy and fact-checking amongst schools and universities. It is important that efforts are made to reduce Russian disinformation, racism and hate-speech on television broadcasted nationally across many Central Asian countries.

“ Support local languages across the state-media sectors and in terms of language funding for media and others ”

- Support local languages across the state-media sectors and in terms of language funding for media and others.
- Comply with and receive certified training in global standards for digitalisation and/or media laws or regulations. One example is the EU's Digital Service Act and General Data Protection Regulation (GDPR).
- Engage positively and constructively with survey, research and other academic or think-tank entities, which explore media consumption and disinformation in Central Asia.
- Actively support media organisations and civil society activists in promoting media literacy and countering disinformation. In doing so, the governments must clearly state that any new legal initiatives must be taken in close coordination with mass media and civil society to avoid adopting measures that stifle freedom of expression under the pretext of countering disinformation.
- Instruct individual government agencies to actively and openly share information with media to increase transparency and public awareness on important issues of public interest and thus deny space for misinformation and fake news on those subjects.

“ Comply with and receive certified training in global standards for digitalisation and/or media laws or regulations. One example is the EU's Digital Service Act and General Data Protection Regulation (GDPR) ”



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