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Sociological Research on Media Consumption and Media Literacy in Central Asian Countries

2023

Kazakhstan | Tajikistan | Uzbekistan

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Methodology of Sociological Research on Media Consumption and Media Literacy in Central Asian Countries (Kazakhstan, Tajikistan, Uzbekistan)

GOAL OF RESEARCH

Identify the mass media content structure in the abovementioned countries: audience`s preferences and expectations, as well as self-assessment of media information literacy of the audience.

TASKS OF RESEARCH

Identify popular information sources and their level of credibility.

Identify media content preferences and attitude towards media.

Determine the state of media, information and digital literacy of the audience.

Calculate integrated indices of population media literacy according to ZIRCON approach.

QUANTITATIVE RESEARCH

Target audience: Individuals - citizens of Kazakhstan/Tajikistan/Uzbekistan from 14 to 65 years old, permanently residing in the country.

Desk research was conducted prior to the field phase and included as follows:

- Review of the report for 2021 and 2019 yy., as well as review of Internews project documentation;
- Review of the work of other grantors and organizations working on media and media literacy;
- Developing a questionnaire and fundamental question pool concerning both media measurement and media literacy;
- Study of materials on the Media Literacy Index provided by the ZIRCON research team.

Data collection method: within the framework of the quantitative research, a structured personal interview (face-to-face) was used as a data collection tool, which allowed to achieve objectives of the research in the best possible way. The face-to-face interview was conducted using tablets (TAPI - Tablet Assisted Personal Interviewing).

SAMPLING

Total sample of respondents in the research:

- Kazakhstan — 1005 respondents
- Tajikistan — 1005 respondents
- Uzbekistan — 1018 respondents

Quantity of respondents was calculated in such a way as to ensure the 95 percent reliability with less than 5 percent of sampling error. This allowed us to obtain a calculation where we can be 95 percent sure that any indicator identified in the final survey differs within +/-3 percent from the situation in the general population.

$$n = \frac{NZ^2P(1-P)}{(N-1)\varepsilon^2 + Z^2P(1-P)} \qquad \text{Formula 1}$$

where:

N – general population of strata
Z – value of normal coordinates for the desired confidence level (assumed Z = 1,96)
e – permissible tolerance (confidence interval)
P – variability of answers (assumed P = 0,5)

Sampling:

Aim of the research was to obtain accurate and representative data on preferences of the population in different countries considering a number of parameters. For this purpose, a stratified sample was formed which reflects the characteristics of the entire general population, ensuring proportional representation of certain population groups. Stratification of the sample included the following parameters:

- **Type of locality** (urban and rural);
- **Gender** (men and women);
- **Age categories** (14-18, 19-29, 30-45, 46-60, 61-65);
- **Ethnic composition**;

The sample was carried out in two stages:

First stage: selection of settlements. Settlements were selected subject to some conditions. First, inclusion of all regions and oblasts in each country under study; second, the mandatory presence of near and far villages in each region in order to maintain the uniformity and representativeness of the sample; third, observing the proportion of urban and rural population in each region separately.

To form the list of settlements, a list of all towns and villages by region with the population size in each region was compiled based on data from the Bureau of National Statistics of every country. Then, using a random multistage sampling method, the lists of settlements were selected to participate in the research.

The number of respondents in every settlement was determined on the basis of population. The entire sampling of 1000 respondents in every country was divided into clusters of 10, totaling 100 clusters, then depending on the population, every settlement was assigned a certain quantity of clusters. Thus, the minimum quantity of respondents in a settlement is 10 people; the maximum quantity depends on the size of the settlement and for cities is up to 100 people.

The second stage: intra-settlement sampling of respondents. Respondents were selected on the basis of sex and age quota. For this purpose, proportion of urban and rural population by age groups 14-24, 25-34, 35-44, 45-54, 55-65, sex distribution and ethnic composition was derived for each country separately based upon the national statistical data. Thereafter, the abovementioned proportions were applied to each region and an appropriate number of respondents was assigned to each region.

Briefing: Prior to starting the fieldwork, supervisors' briefings were held in Almaty, Dushanbe and Tashkent to discuss the methodology and technique of the research, tools, and specifics of the media survey. Issues related to selection of settlements, household and respondents sampling were also discussed.

Field control: to ensure completeness and accuracy of the gathered data, quality control was carried out at all stages of the project. The quantitative research control was conducted in three stages:

- listening to 50% of the audio recordings of interviews;
- getting in touch with 20% of interview respondents by phone;
- 100% reconciliation of the database in SPSS in regard to logic, transitions, omissions of answers to questions.

Date processing: data processing was carried out in SPSS and MS Excel.

QUALITATIVE RESEARCH

Interview method: In order to provide a more advanced qualitative overview of the project implementation and identify cause-and-effect relation, the qualitative research was conducted using 5 in-depth interviews (IDI) with media experts in each country under survey. All the IDIs were held at a location preferred by a respondent and in his/her preferred language; all interviews were audio-recorded. Subsequently, the audio recordings were transcribed (converted to Word format) and translated from national languages to Russian for analysis. Several in-depth interviews were held online.

Sample: 5 respondents in each country.

Survey geography: Kazakhstan, Tajikistan, Uzbekistan.

Methodology of respondents` selection for the survey: selection of respondents for participation in in-depth interviews was carried out according to the lists of the executor, approved by Internews.

Object of the research were highly qualified experts in each of the three countries:

- Media literacy specialists;
- Political scientists/sociologists;
- Business actors in the field of advertising, IT and information security;
- Representatives of media business, editors-in-chief of mass media

RESEARCH TOOLS

The survey was carried out with the help of pre-developed research tools for quantitative and qualitative components and was customized by the involved Internews representatives and M-Vector specialists. At each stage of the research several meetings with Internews specialists were organized to discuss the complied questionnaire for the quantitative research, guide for the qualitative research, workflow management, and report writing schedule. The questionnaire for the quantitative component was programmed by M-Vector specialists on the SimpleForms platform with the aim to carry out subsequent surveys using tablets.

Number of questions in the questionnaire: 36 plus 8 socio-demographic parameters. Questionnaires were made in Kazakh/Tajik/Uzbek and Russian languages. A pre-test of the questionnaire (10 interviews) was conducted in each country.

Dates of fieldwork held: 20/04/2023–12/08/2023

1. KAZAKHSTAN

1.1. Socio-demographic Parameters of Respondents

The study involved 1005 (one thousand five) respondents distributed into 5 age groups:

- **14-18 years:** 125 respondents (12%)
- **19-29 years:** 217 respondents (22%)
- **30-45 years:** 374 respondents (37%)
- **46-60 years**: 226 respondents (22%)
- **61-65 years:** 63 respondents (6%)

Thus, middle-aged and young respondents prevail in the sampling which allows to cover the main age segments of the survey's target audience. Distribution of respondents by age groups corresponds to the countrywise statistics and ensures representativeness of the sample.

In terms of gender, male and female respondents are represented in the research in roughly equal proportions: 489 men (49%) and 516 women (51%). This distribution is close to even, which ensures gender balance of the sampling.

***Diagram 1.1.1.** Age Demographic of Respondents **(2023 y.)**, N=1005*

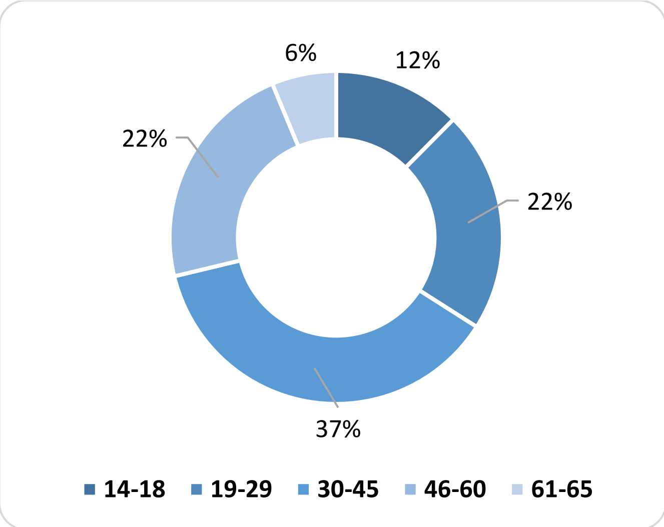
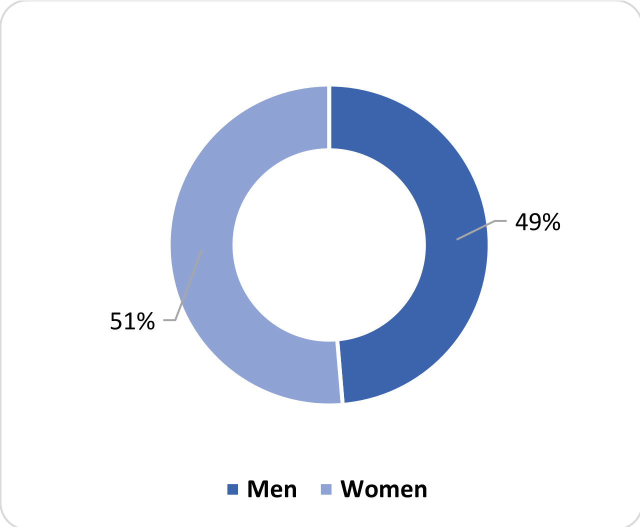
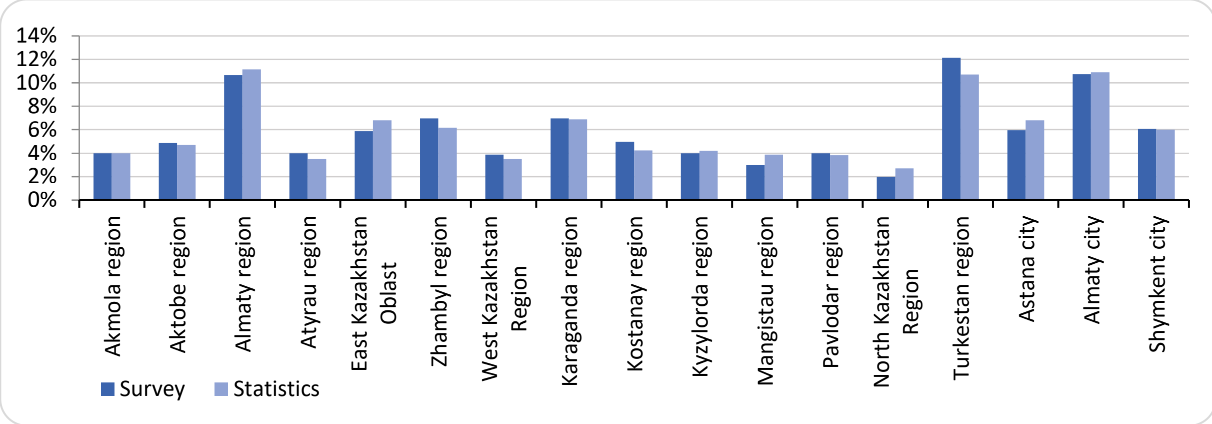


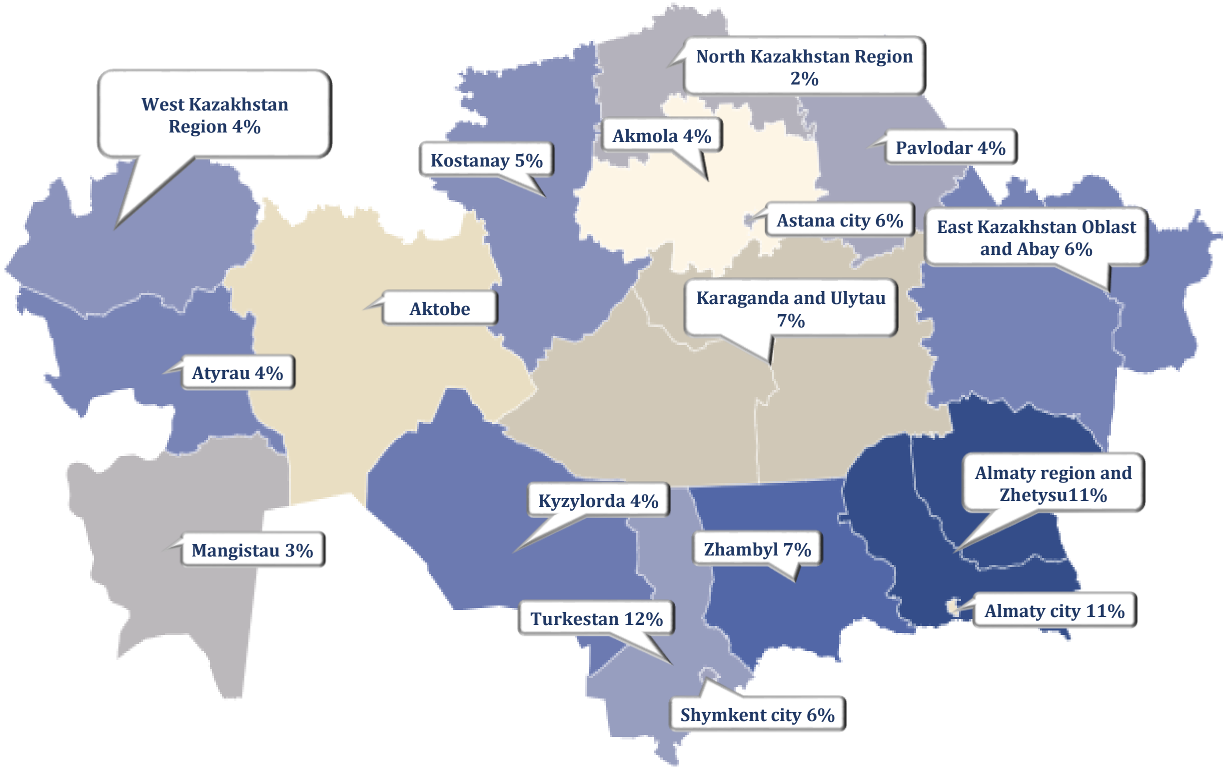
***Diagram 1.1.2.** Gender of Respondents **(2023 y.)**, N=1005*



Residents of urban areas account for approximately 61% (615), while residents of rural areas account for 39% (390) of the total number of respondents. Distribution of respondents by type of settlement and by region reflects the demographic structure of the sampling and takes into account quotas pre-determined according to the nationwide statistics.

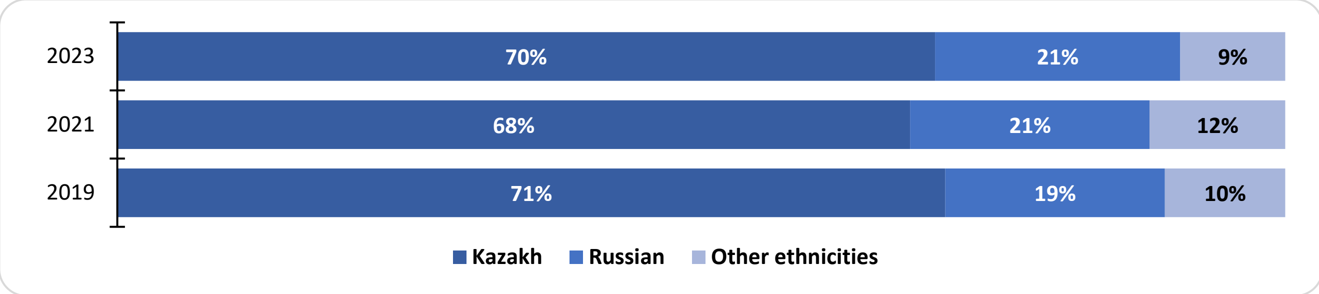
__Diagram 1.1.3.__ Regional Distribution of Respondents __(2023 y.)__, N=1005





Here we can see a stable trend of respondents` correspondence by national identity for the 3 (three) years of observation, with a minor deviation within the range of 3 percentage points for the period of 2019-2022 yy: ratio of the **Kazakhs** participated in the research 2023 is 70 percent, the **Russians** is 21 percent, and the ratio of **other ethnic groups** is equal to 9 percent. Such proportion of ethnic groups in the sampling correlates to the ethic population structure of Kazakhstan.

Diagram 1.1.4. National Affiliation Distribution of Respondents in Kazakhstan, Surveys for 2019, 2021 and 2023 yy.



Considering language preferences in home environment and in the family circle, in general the Kazakh language dominates as a language of communication at home, but there are significant variations depending on the place of residence, gender and age of respondents:

- **Language preferences**: in general, the Kazakh language slightly dominates as a language spoken in the homes, namely it is used by 51% of respondents. Russian as a language of everyday communication in the family circle was noted by 47% of respondents.
- **Locality**: in rural areas the percentage of the Kazakh speakers at home is 65%, while in urban areas this percentage is significantly lower (43%) and the Russian language prevails - 55%.
- **Gender**: Kazakh is slightly more common in home communication among the male part of the audience (54%), while Russian is slightly more often used by women (49%).
- **Age**: 62% of respondents aged 14-18 of the Kazakh nationality speak Kazakh and only 38% of them speak Russian. In contrast, 14-18 year old respondents of the Russian nationality and representatives of other ethnic groups at home speak Russian 100% of the time. On average, 57% of respondents of all ethnic groups aged 14-18 speak Russian at home. Thus, with regard to the age we can see an increasing tendency of the share of those who use the Kazakh language at home.

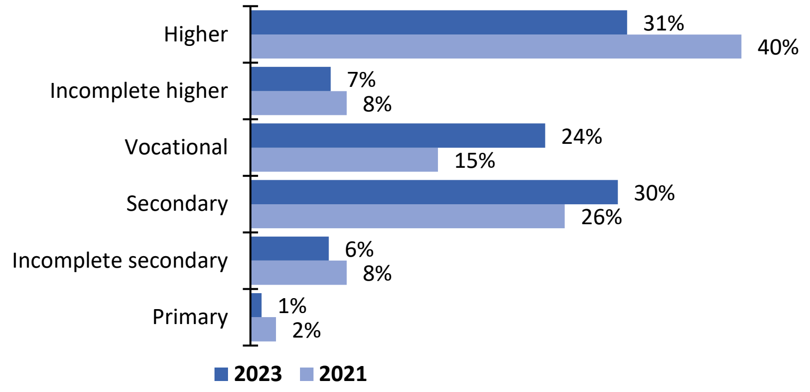
Summarizing the above, there is a general trend, namely the growing popularity of the Kazakh language, especially among rural population, men and elderly generation.

*Table 1.1.1. Percentage of Respondents by Language Preference **(2023 y.)**, N=1005*

Language	Total, n=1005	Settlement type		Gender		Age				
		Urban area, n=615	Rural area, n=390	Male, n=489	Female, n=516	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Kazakh	51%	43%	65%	54%	49%	43%	51%	55%	51%	51%
Russian	47%	55%	33%	44%	49%	57%	47%	44%	46%	47%
Other	2%	2%	1%	2%	2%	0%	3%	1%	3%	2%

Distribution of respondents by educational level shows the predominance of persons with secondary (30%) and higher education (31%). These two categories together account for 61% of the total number of respondents. Next in descending order are respondents with vocational education - 24%, with incomplete higher education - 7%, incomplete secondary education - 6% and with primary education - 1%. Generally, the distribution shows a sufficiently high educational level among the respondents.

Diagram 1.1.5. Educational Level of Respondents, 2023 y. (N=1005), 2021 y. (N=1146)



Analysis findings of financial position of respondents for the period of 2019-2023 show the following key points:

- **Improved assessment of financial situation**: the share of respondents without financial difficulties who are ready to purchase real estate increased from 1% in 2019 to 12% in 2023. During the survey, respondents were able to embellish their situation and give more socially acceptable and desirable answers. The growth dynamic for this indicator is increasing year on year, from 1% in 2019 to 7% in 2021 and 12% in 2023.
- **Ability-to-pay growth**: the percentage of those who can afford expensive purchases (except real estate) has increased from 8% in 2019 to 16% in 2023.
- **Stable average financial position**: the largest group of respondents (32% in 2023) estimates their financial situation as average - they have enough finances to buy household appliances but not a car. This group remains relatively stable year on year.
- **Reduced constraints**: the proportion of those who have difficulty buying appliances has fallen from 39% in 2019 to 21% in 2023.
- **Reduced serious financial difficulties**: the proportion of respondents experiencing financial hardship has decreased from 7% in 2019 to 4% in 2023, i.e. those who do not have enough money for clothing. At the same time, there is a slight increase in the proportion of those who do not have enough money for food - from 1% in 2019 to 3% in 2021 and 2023.

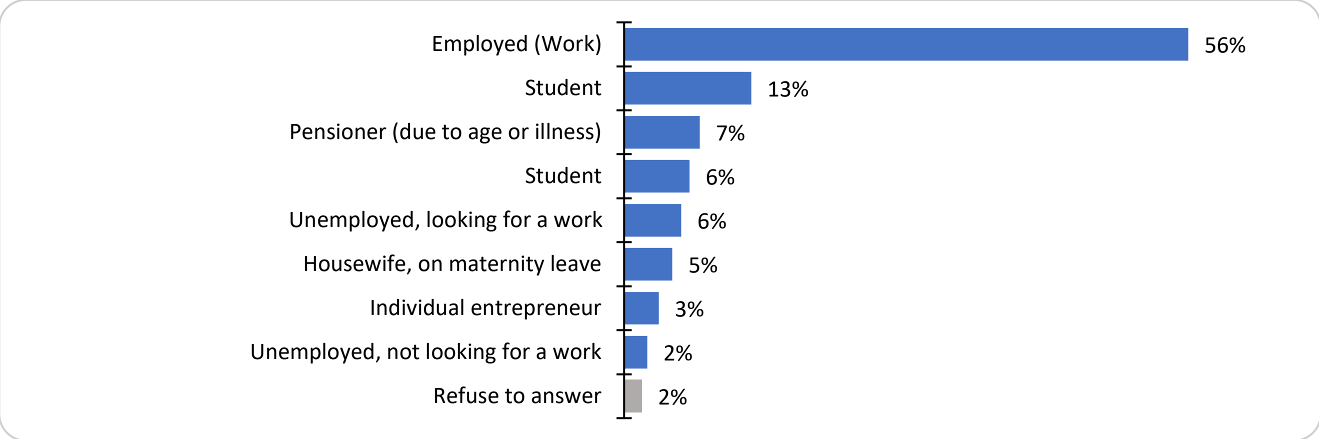
Thus, a trend of improvement of the material position of population can be seen between 2019 and 2023. Economic growth[1], wage growth[2] and state-supported social assistance[3] are likely to be the factors contributing to this trend.

***Table 1.1.2.** Financial Condition of Respondents*

	2019, N=1000	2021, N=1146	2023, N=1005
We do not have any financial difficulties. If necessary, we can buy an apartment or a house.	1%	↑ 7%	↑ **12%**
We have enough money for everything (expensive clothing, car, etc.), except for expensive purchases such as an apartment or a country house	8%	↑ 11%	↑ **16%**
We can buy the necessary household appliances but we can`t afford to buy a car	33%	↓ 30%	↑ **32%**
We have enough to buy food and clothing but it will be difficult for us to buy a TV, refrigerator or washing machine	39%	↓ 28%	↓ **21%**
We have enough money to buy food but to buy clothes for us is a serious problem	7%	= 7%	↓ **4%**
We do not always have enough money even for food	1%	↑ 3%	= **3%**
Refuse to answer	11%	14%	**10%**
Total	**100%**	**100%**	**100%**

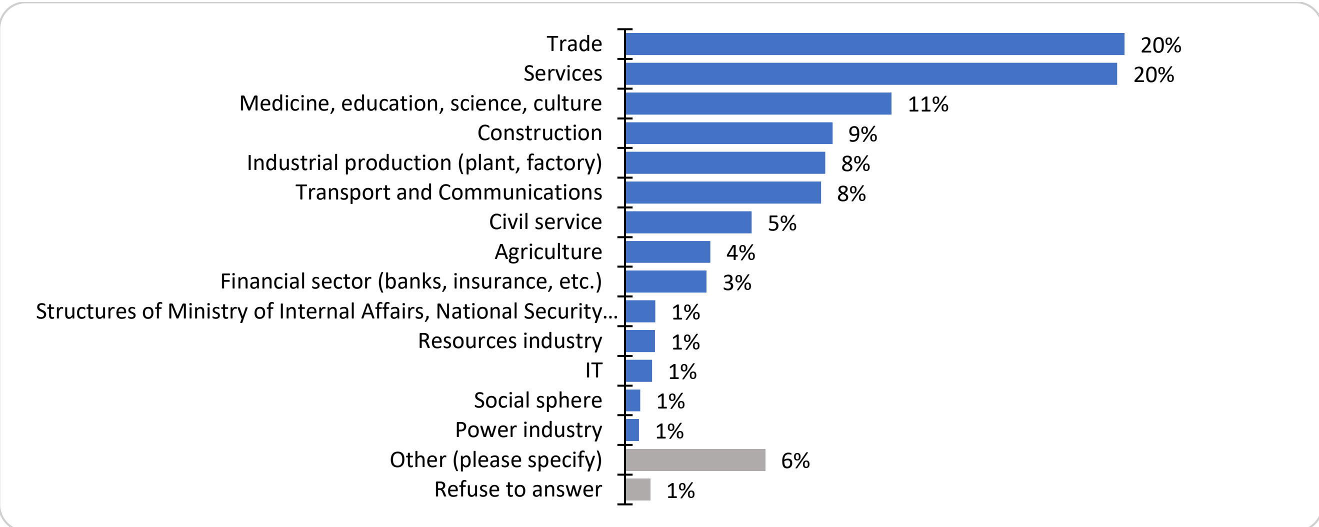
Analysis of the sociodemographic composition of respondents shows a high level of labor employment of the target audience: 56% of respondents have a job and a regular income. 13% are students and 7% are schoolchildren receiving education, and 7% are pensioners. The other groups (unemployed and not planning to look for a job - 8%, housewives - 5%, entrepreneurs - 3%) are less numerous. Thus, the actively working population makes up the majority of the sampling, which demonstrates a high employment rate among the respondents.

Diagram 1.1.6. *Social Status of Respondents* ***(2023 y.)****, N=1005*



Considering the fourteen fields of activity, the largest share of employed respondents work in the realm of trade (20%) and services (20%). These fields are the most widespread and highly demanded types of economic activity. A significant part of the respondents (11%) are employed in the sectors of education, medicine, science and culture. 9% are employed in the construction industry, 8% in the industrial sector and 8% in the transport sector. A small proportion of respondents work in agriculture (4%), civil service (5%), financial sector (3%), as well as in IT, power industry, security services and social sphere (1% each). Thus, the employed respondents mainly represent mass employment sectors in trade, services, industry and education.

Diagram 1.1.7. *Employment Sectors of Respondents (2023 y.), N=1005*



1.2. Media Consumption: Main Sources, Preferences, Consumption Language

Main Sources of Information About Life in the Country

It is worth noting the growing popularity of online information sources such as social networks which are the main sources of information about national news. At the same time, traditional sources such as television, newspapers and radio have lost some of their previous popularity:

- **Social networks:** share of social networks increased from 46% in 2019 and 2021 to 57% in 2023 and became the most popular source of online information with regard to national news.
- **Internet websites**: share of Internet websites remains stable at 43% in 2021 and 2023 after decreasing from 53% in 2019, indicating the steady use of online media outlets as information sources despite their declining popularity.
- **Television**: one can see a significant decline in the share of television from 60% in 2019 to 34% in 2023, indicating a decline in its popularity, possibly due to the growth of internet sources.
- **Personal contacts**: share of personal contacts (friends, relatives) has also decreased from 42% to 23% over the period under review, indicating the decreasing role of personal communication for obtaining information.
- **Traditional media** - newspapers, magazines and radio: traditional media, for example, newspapers, magazines and radio are the least popular, their share does not exceed 10% over the years. This demonstrates their minimal role as sources of information for the audience.

Detailed analysis of the decline in the share of personal contacts. One of the factors leading to personal contacts decrease may be that people are increasingly beginning to rely on news resources for information from the Internet: in 2023, the majority of respondents **who *get information primarily from other people*** also turn to social networks (55%) and Internet websites (34%) for information. In comparison, in 2021, ***those who mainly received information from other people*** turned to social media in 26% of cases and internet sites in 31% of cases.

Another factor may be a level of trust in the sources of information: in 2023, respondents ***who receive information from other people*** show more trust in information obtained from websites (23%) and television (30%) compared to information obtained from other people (13%). In 2021, on the other hand, ***those who mainly received information from other people*** showed more trust in TV (65%) and information obtained through communication with other people (26%).

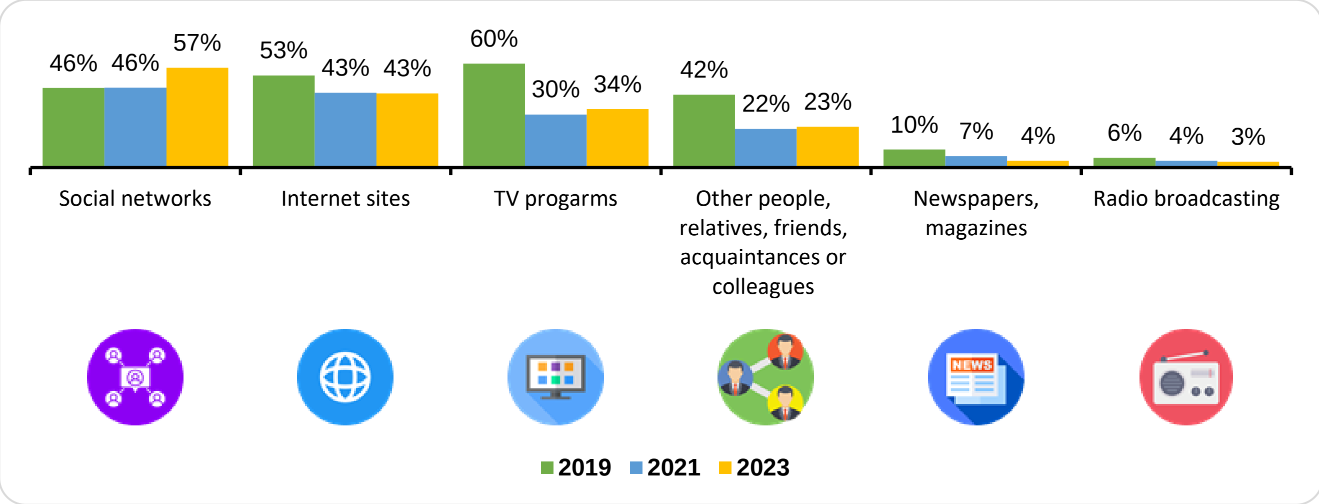
Furthermore, one of the key factors is the COVID-19 pandemic, which forced people to significantly limit face-to-face interactions, resulting in a dramatic increase in the use of online services for communication and information. By 2023, despite the removal of many restrictions, many people were used to receiving news and socializing online, so the share of personal contacts never returned to the pre-pandemic level.

Detailed analysis of television share growth in 2023 compared to 2021. There is some growth in the share of television as a source of information about life in Kazakhstan in 2023, from 30% in 2021 to 34% in 2023. Possible reasons for the growth:

- Increased audience interest in news and analytical programs on Kazakh central TV channels – from 35% in 2021 to 45% in 2023;
- Consumption of information about national news on TV increased in almost all age groups by 3-10%, especially among the senior age group 61-65yrs. (from 58% in 2021 to 68% in 2023). Consumption of information about life in the country on TV has also increased in many regions of the country, particularly in Aktobe region (from 21% to 49%), Atyrau region (from 24% to 47%), Mangistau region (from 34% to 56%) and in Shymkent city (from 33% to 55%);
- Increase in the frequency of daily TV viewing in 2023 (41%), compared to the same indicator in 2021 (37%). In particular, daily TV viewing increased significantly in Aktobe region (from 24% to 47%), West Kazakhstan region (from 18% to 45%), Karaganda (from 29% to 55%), Kyzylorda (from 37% to 59%) and Mangistau regions (from 33% to 56%);

Thus, data analysis shows the growing importance of Internet sources (social networks, websites) and the decreasing role of traditional media (TV, print media, radio) as well as personal contacts as sources of information. This shift can be related to the growth of digital literacy as well as change of information consumption habits in a rapidly changing media industry. Sociocultural changes, including the increased use of smartphones and active presence on social media, may also influence the change in respondents' preferences in obtaining information.

Diagram 1.2.1. *Main Information Sources for Nationwide News*



The use of **social networks** as a source of information is most popular among youth. However, one can also see increased interest in social networks across all age groups during the period of 2019 to 2023. **Web sites** still keep a stable attraction in all age groups. **Television** remains the primary source of information for viewers over 46 years of age, despite an overall decline in its popularity. Meanwhile, compared to 2021, TV consumption has increased by 3-10% in 2023 in almost all age groups, even among young people. **Newspapers and radio** significantly lost their share of interest in all age groups. Receiving information **from other people** declines with the age but remains relatively stable. Consequently, there is a steady tendency for all ages, especially young people, to move away from television and other traditional media to new digital channels of information.

Table 1.2.1. *Main Sources of Information for Nationwide News by Different Age Categories*

Answer options	Year	14-18	19-29	30-45	46-60	61-65
Social media	***2023***	↑ **68%**	↑ **69%**	↑ **60%**	↑ **45%**	↓ **22%**
	2021	54%	63%	45%	28%	27%
	2019	61%	55%	49%	31%	20%
Internet sites	***2023***	↑ **45%**	↑ **43%**	↓ **44%**	= **40%**	= **32%**
	2021	38%	38%	50%	39%	32%
	2019	66%	57%	56%	48%	20%
Other people, relatives, friends, acquaintances or colleagues	***2023***	↓ **30%**	↑ **27%**	= **22%**	= **21%**	↓ **16%**
	2021	34%	20%	21%	21%	20%
	2019	36%	40%	41%	46%	46%
TV programs	***2023***	↑ **17%**	↑ **20%**	= **28%**	↑ **55%**	↑ **68%**
	2021	13%	17%	29%	53%	58%
	2019	46%	48%	60%	71%	77%
Newspapers, magazines	***2023***	= **3%**	↓ **2%**	= **4%**	↓ **6%**	↓ **7%**
	2021	3%	4%	5%	10%	28%
	2019	4%	6%	9%	17%	23%
Radio broadcasting	***2023***	= **2%**	= **2%**	= **4%**	= **4%**	↓ **4%**
	2021	3%	2%	5%	4%	9%
	2019	4%	4%	6%	8%	4%

Regularity of Information Receipt

The common trend in media consumption shows an increase in internet connectivity and attraction of online content, while one can see decrease in interest in traditional media formats such as watching TV and reading printed newspapers and magazines.

Digital communication and gadgets. There has been a clear increase in internet connectivity and digital activity over the last years. The steady trend towards everyday **communication via mobile devices** is supported by the data: 99% of respondents in 2023 and 100% in 2021 speak on cell phones/smartphones. **Internet accessibility** also remains high, with 90% of respondents using the Internet in 2023, compared to 98% in 2021 and 89% in 2019. Meanwhile, interest in using **computers, laptops and tablets** is declining, from 78% in 2021 to 62% in 2023, indicating a shift in media habits toward more convenient and mobile means of accessing information and content.

Visual content creation. Visual content creation in the form of photos and videos remains a significant part of media consumption among respondents. Despite slight fluctuations, interest in **taking photos** remains persistently high, with 79% of respondents in 2023, 85% in 2021, and 79% in 2019 regularly taking photos using a variety of devices. The trend of **creating video content** also persists, although the slight decline from 78% in 2021 to 69% in 2023 may indicate some shift in user interests. Both of these trends, photo and video content creation, confirm the growing importance of visual content in online communication and are more related to the development of social media and video platforms.

Video content consumption. The common trend in video content consumption indicates a shift in audience preference away from traditional mediums such as TV and long-form videos to more flexible and adaptive online platforms; thus, interest in **watching videos** declined from 39% in 2021 to 27% in 2023, as did **watching TV** (from 82% in 2021 to 77% in 2023). Let us consider in more detail the relationship between those who in 2023 chose television as their main source of information (34% - Diagram 1.2.1) and those who watch TV with different frequency (77%): a) Among those 34% of respondents who name TV as their main source of news, 70% of them watch TV daily; b) At the same time, of the 41% of respondents who watch TV daily, 56% of them name it as their main source of news, but along with this, for the same category of respondents who watch TV daily, other equally main sources of news are social networks (48%) and Internet sites (34%). Thus, we can conclude that TV and TV news audiences overlap significantly, but are not identical. Television remains an important part but not the only source of news even for its daily audience.

Audio content consumption. The shift in media consumption towards online formats is confirmed by decline in interest in traditional audio sources such as **radio** (from 63% in 2021 to 48% in 2023) and the preserved interest in **audio recordings** at a persistently high level (67% in 2023, 64% in 2021 and 59% in 2019), reflecting the importance of music- and audio content. Let's consider more in details the factors behind the decline in radio share. To further analyze this dynamics, let us compare the data on 1) frequency of radio listening and 2) news sources among daily radio audiences. Thus, in 2023, 21% of respondents listen to radio daily (Table 1.2.3.), where only 12% get news on the radio. At the same time, these 21% of daily radio listeners get the news from social networks (55% in 2023 and 44% in 2021), Internet sites (38%) and television (36%). Therefore, we can assume that decline in radio's overall audience share is due to the fact that even among daily listeners, another sources of news, particularly social networks and the Internet, are growing in popularity. People listen to the radio, but they already use it less as a source of news and information, giving preference to online channels.

Media consumption: print and digital sources. There is an obvious shift in information consumption in today's media environment: interest in traditional **print media** is declining (from 53% in 2021 to 41% in 2023), as well as interest in online platforms, including **reading newspapers and magazines in electronic format**, albeit less significantly (from 49% in 2021 to 47% in 2023), while social networks are gaining more significant positions in audience preferences (85% in 2023).

Reading print and electronic literature. Reading books continues to be a significant part of leisure and intellectual development, but there has been a decline in interest in **reading paper books** (from 62% in 2021 to 51% in 2023) and **e-books** (from 44% in 2021 to 37% in 2023), which may indicate the impact of shifting digital habits as well as the availability of alternative sources of information and entertainment that compete with books.

Table 1.2.2. *Usage Frequency of Mass Media and Media Technologies*

Use of different digital and traditional media	2019, N=1000	2021, N=1146	2023, N=1005
Be using the cell phone/smartphone	98%	↑ 100%	= **99%**
Go online using any device	89%	↑ 98%	↓ **90%**
Read social media	–	–	**85%**
Take photos from any device	79%	↑ 85%	↓ **79%**
Watch TV	93%	↓ 82%	↓ **77%**
Make videos	78%	= 78%	↓ **69%**
Listen to audio records (mp3, mp2, IPod, including podcasts, music and books)	59%	↑ 64%	↑ **67%**
Use computers, laptops, tablets	78%	= 78%	↓ **62%**
Read book (print)	52%	↑ 62%	↓ **51%**

Listen to the radio (at home, in car, on public transport, etc.)	62%	= 63%	↓ **48%**
Read newspapers and magazines, web sites (digital and/or online format)	36%	↑ 49%	↓ **47%**
Read newspapers and magazines (paper editions)	55%	↓ 53%	↓ **41%**
Read books (e-books)	30%	↑ 44%	↓ **37%**
Watch video records (CDs, videotapes)	36%	↑ 39%	↓ **27%**

** In order to simplify the analysis, answer options about frequency of the action (daily, weekly, monthly, less frequently) were integrated into one response demonstrating herewith the regular behavior.*

Analyzing the respondents' answers about the **daily or almost daily frequency** of use of various digital and traditional media one can note a number of significant changes between 2021 and 2023. For example, daily or almost daily use of computer, laptop and tablet decreased by 12 percentage points, from 55% in 2021 to 43% in 2023, which may indicate a downtrend in the time spent on gadgets use in daily life. In addition to this, there is a decline in daily radio listening from 28% to 21% of respondents, demonstrating less engagement with traditional audio media. Meanwhile, there is an increase in daily taking photos from any device from 35% to 42% of respondents, reflecting the popularity of visual content creation. One can also observe the growth of daily TV consumption, increasing from 37% in 2021 to 41% in 2023. One of the factors behind the increase in daily TV audience is growth in the share of viewers who watch news and analytical programs on central Kazakh TV channels on a daily basis, from 34% in 2021 to 53% in 2023. Regular viewing of news and analytical programs is likely to have become a habit for many Kazakhstanis, which, in its turn, is responsible for growth of the daily TV audience. Another factor contributing to the growth in daily television consumption is popularity of entertainment programs, such as reality shows and TV series, which attract viewers with their serial format. For example, the Channel One Eurasia broadcasts the youth reality show “Kalaulym” (QosLike), where participants get to know each other. This program is broadcast daily and according to experts is one of the highest rated projects in the history of television in Kazakhstan (see page 79). Regular broadcasting of such shows creates a habit among the audience to turn on the TV every day.

Among the respondents' answers to the option ‘**Never’** relating to the use of various digital and traditional media, there is a marked increase in the share of those who completely refuse a number of traditional media. In particular, the share of those who do not listen to the radio increased from 37% to 50%, those who do not read paper books - from 37% to 48%, and those who do not read printed newspapers and magazines - from 47% to 57%. There has also been an increase of those who never watch videos on a physical media (from 60% to 72%) or never make their own videos (from 22% to 30%). In addition, the percentage of those who never go online has increased from 2% in 2021 to 9% in 2023 and the number of those who never use a computer, laptop or tablet has increased from 22% in 2021 to 37% in 2023.

Table 1.2.3. *Usage Frequency of Mass Media and Media Technologies*

	Daily or almost daily			Never		
	2019	**2021**	**2023**	**2019**	**2021**	**2023**
Be using the cell phone/smartphone	89%	↑ 97%	↓ **94%**	2%	= 1%	= **1%**
Go online using any device	70%	↑ 90%	↓ **82%**	10%	↓ 2%	↑ **9%**
Read posts on social media	–	–	**69%**	–	–	**14%**
Listen to audio records (mp3, mp2, IPod, including podcasts, music and books)	29%	↑ 36%	↑ **46%**	38%	↓ 35%	↓ **32%**
Use computers, laptops, tablets	43%	↑ 55%	↓ **43%**	21%	= 22%	↑ **37%**
Take photos from any device	33%	↑ 35%	↑ **42%**	20%	↓ 15%	↑ **20%**
Watch TV	53%	↓ 37%	↑ **41%**	7%	↑ 18%	↑ **22%**
Make videos	24%	= 23%	↑ **30%**	21%	= 22%	↑ **30%**
Listen to the radio (at home, in car, on public transport, etc.)	22%	↑ 28%	↓ **21%**	36%	= 37%	↑ **50%**
Read newspapers and magazines, web sites (digital and/or online format)	10%	↑ 14%	↑ **16%**	61%	↓ 50%	↑ **52%**
Read book (print)	10%	↑ 13%	= **14%**	41%	↓ 37%	↑ **48%**
Read books (e-books)	6%	↑ 11%	= **12%**	62%	↓ 55%	↑ **61%**
Watch video records (CDs, videotapes)	6%	↑ 13%	= **12%**	62%	↓ 60%	↑ **72%**
Read newspapers and magazines (paper editions)	12%	↓ 10%	= **10%**	43%	↑ 47%	↑ **57%**

** Other answer options on frequency of the action (daily, monthly, less frequently) are not shown in the table.*

Regarding this issue, we can note the presence of certain differences in media consumption between representatives of Russian and Kazakh ethnic groups. More generally, according to the data obtained, the vast majority of respondents from both ethnic groups demonstrate high involvement in use of modern digital devices and platforms. Thus, about 90-100% of

Russian and Kazakh respondents note that they regularly talk on cell phones, go online using various devices, read posts in social networks and take photos. The share of regular computer, laptop and tablet users among Kazakhs (61%) is notable lower than the same indicator among Russians (67%). The same tendency can be traced with regard to watching videos, listening to audio recordings and taking videos. At the same time, Kazakhs are slightly ahead of Russians in terms of the share who regularly read printed books (53% vs. 47%), newspapers and magazines (44% vs. 37%), as well as electronic books (40% vs. 31%). This may indicate the greater preservation of traditional reading practices among the Kazakh ethnos.

Table 1.2.3.1. *Usage Frequency of Mass Media and Media Technologies by Ethnicity* ***(2023 y.)***

With varying frequency:	Russians	Kazakhs
Be using the cell phone/smartphone	99%	98%
Go online using any device	92%	88%
Read posts on social media	86%	84%
Take photos from any device	83%	77%
Watch TV	77%	78%
Make videos	72%	68%
Listen to audio records (mp3, mp2, IPod, including podcasts, music and books)	68%	66%
Use computers, laptops, tablets	67%	61%
Read book (print)	47%	53%
Listen to the radio (at home, in car, on public transport, etc.)	48%	49%
Read newspapers and magazines, web sites (digital and/or online format)	46%	48%
Read newspapers and magazines (paper editions)	37%	44%
Read books (e-books)	31%	40%
Watch video records (CDs, videotapes)	22%	30%

** In order to simplify the analysis, answer options about frequency of the action (daily, weekly, monthly, less frequently) were integrated into one response demonstrating herewith the regular behavior.*

To identify thematic preferences and the specifics of user-generated video content, respondents who reported regularly making video were asked what types of video content they typically shoot. According to the survey results**, family videos** are the most popular, with 91% of respondents saying they shoot them with varying regularity, and 37% of them doing so one or more times per week. As for other types of video content, here we can see quite another situation. In particular, no more than 45% of respondents create **entertaining videos for social media** with variable regularity, while 53% say they never produce such content. **Educational videos** are even less popular - only 21% of respondents make them on a regular basis, while 77% say they do not make such videos. In the meantime, what calls attention to itself is a considerable high percentage (12-16%) of those who make videos about social problems and violations of citizens' rights at various intervals. Although these figures are not so high compared to entertainment content, they still seem to be quite high for such specific material. These indicators speak for the active civic position of a significant part of the audience, which seeks to draw the attention of the government and society to important issues. Such videos often help to draw attention to rights violations and protect victims.

Thus, unlike family and entertainment videos, all other types of video content are filmed by only a small part of the audience and are rather episodic.

Table 1.2.4. *Topics of Personal Video Shootings Among Respondents* ***(2023 y.)***

Types of user-generated video content	Frequency						Not sure
	* With varying frequency	Daily or almost daily	One or more times per week	One or more times a month	Less often than once a month	Never	
Make family videos (kids, holidays, family events, etc.)	**91%**	*17%*	*32%*	*25%*	*17%*	**8%**	*1%*
Make entertaining videos for Tik-Tok, Instagram	**45%**	*16%*	*14%*	*8%*	*8%*	**53%**	*2%*
Make videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	**23%**	*6%*	*7%*	*5%*	*5%*	**74%**	*3%*
Film educational videos, advices, coaching	**21%**	*4%*	*5%*	*6%*	*6%*	**77%**	*3%*

Make videos about social problems of a city/village aiming herewith to solve the issue	**16%**	*4%*	*3%*	*4%*	*6%*	**81%**	*3%*
Make videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	**12%**	*3%*	*2%*	*3%*	*5%*	**85%**	*3%*

** In order to simplify the analysis, answer options about frequency of the action (daily, weekly, monthly, less frequently) were integrated into one response 'With varying frequency'.*

There are certain differences in the types of video content created by users of different age groups:

- For example, **family topics** are the most popular among all respondents, where 82% to 94% of respondents said they make such videos.
- As for **entertainment videos for social networks**, they are most in demand among the youngest audience of 14-18 years old (66%), then interest decreases to 21% among respondents aged 61-65.
- **Creating video blogs** is also more common among 14-18-year-olds (33%), while in the other age groups this figure varies from 15% to 24%.
- The outstanding interest in creating **educational videos** is seen in the 19-45 age group (20-23%).
- **Videos about social problems** are most in demand among respondents aged 19-45 (17-19%) and 61-65 (19%), which indicates that middle-aged and older people are more socially active and civic-minded.
- **Videos about violations of rights and laws** - all ages have whose who regularly creates such content - from 10% among respondents aged 19-29 to 14% among respondents aged 30-45. These figures can be considered quite high, given the specificity of the topic. Especially it can be seen in the 30-45 age group, where 14% of respondents of this age show their civic position and their desire to fight against violations of rights and laws through videotaping. This is the most active part of society, which is not afraid to raise critical social issues using the possibilities of video and the Internet.

Now it can be seen that age has a marked impact on the types of video content produced due to the different interests and needs of users of different generations.

Table 1.2.5.** Topics of Personal Video Shootings Among Different Age Categories **(2023 y.)

Types of user generated video content	Age category				
	14-18, n=99	19-29, n=179	30-45, n=269	46-60, n=135	61-65, n=24
Make family videos (kids, holidays, family events, etc.)	87%	87%	94%	94%	82%
Make entertaining videos for Tik-Tok, Instagram	66%	59%	41%	23%	21%
Make videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	33%	22%	24%	17%	15%
Film educational videos, advices, coaching	19%	20%	23%	18%	14%
Make videos about social problems of a city/village aiming herewith to solve the issue	12%	17%	19%	14%	19%
Make videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	13%	10%	14%	11%	11%

** In order to simplify the analysis, answer options about frequency of the action (daily, weekly, monthly, less frequently) were integrated into one response and analyzed from a perspective of age groups.*

For descriptive reasons let us consider in details the key figures among respondents from three Central Asian countries who use video shooting to express their civic position and solve social problems.

For example, 16% of respondents in Kazakhstan, 15% in Uzbekistan and 11% in Tajikistan regularly make videos about social problems in the city or village in order to solve them. Given the rather narrow focus of this type of filming, these figures can be considered relatively high.

Besides, a considerable share of respondents - from 6% to 12% in different countries - use video to record violations of rights and laws for the purpose of subsequent defense: in Kazakhstan this type of content is filmed by 12% of the audience, in Tajikistan - 7%, in Uzbekistan - 6%.

Thus, the comparative analysis shows that Kazakhstan has the highest level of civic activity in the use of video recording as a tool for solving public problems and protecting citizens' rights. Tajikistan and Uzbekistan have lower rates of audience involvement in the creation of socially significant video content. Nevertheless, one can see a motivated audience in all three countries, which can be characterized as quite conscious and concerned citizens who are ready to protect public interests with the help of video technologies.

Table 1.2.5.1.** Share of Socially Significant Video Content Produced in Three Central Asian Countries **(2023 y.)

Types of socially significant video content	Country	Frequency					
		*With varying frequency	Daily or almost daily	One or more times per week	One or more times a month	Less often than once a month	Never
Make videos about social problems of a city/village aiming herewith to solve the issue	Kazakhstan	**16%**	*4%*	*3%*	*4%*	*6%*	**81%**
	Tajikistan	**11%**	*2%*	*3%*	*2%*	*4%*	**88%**
	Uzbekistan	**15%**	*3%*	*4%*	*4%*	*4%*	**85%**
Make videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	Kazakhstan	**12%**	*3%*	*2%*	*3%*	*5%*	**85%**
	Tajikistan	**7%**	*1%*	*1%*	*2%*	*3%*	**92%**
	Uzbekistan	**6%**	*1%*	*1%*	*2%*	*2%*	**93%**

** In order to simplify the analysis, answer options about frequency of the action (daily, weekly, monthly, less frequently) were integrated into one response 'With varying frequency'.*

Consumption Language

Over the period from 2021 to 2023, there is a decrease in the share of the Russian language and an increase in the share of the Kazakh language in many media channels, such as television, radio, reading print and online media, browsing the internet and using social media:

- **TV** in 2021 was watched mostly in Russian (41%). By 2023, the share of Russian decreased to 27%, Kazakh increased from 11% to 24%, bilingual viewing increased from 28% to 30%.
- **Radio** in 2021 was listened to predominantly in Russian (43%). By 2023, the share of Russian decreased to 23%, Kazakh increased from 12% to 25%, bilingual listening increased from 26% to 32%.
- **Print and online media** in 2021 were read mostly in Russian (53%). By 2023, the share of Russian decreased to 29%, Kazakh increased from 9% to 24%, bilingual reading increased from 21% to 22%.
- **Web sites** in 2021 were browsed mainly in Russian (54%). By 2023, the share of Russian decreased to 37%, Kazakh increased from 7% to 17%, bilingual browsing increased from 22% to 28%.
- **Social media** in 2021 were used mostly in Russian (57%). By 2023, the share of Russian decreased to 38%, Kazakh increased from 8% to 18%, and bilingual use increased from 20% to 27%.

Therefore, these results indicate a gradual shift in language preferences in the media space. This shift can be interpreted as a reaction to the Kazakh language promotion and wider access to content in the native language. Nevertheless, despite the tendency for the Kazakh language to increase in media content consumption, the dominance of the Russian language remains on the Internet. Traditional media show their tendency to equalize the share of Russian and Kazakh languages.

Table 1.2.6.** Language Preferences for Consuming Information from Different Sources **(2023 y.)

Consumption language	Watch TV, n=781	Listen to the radio, n=502	Read newspapers / magazines (print and online), n=614	Browse the Internet, n=931	Use social media, n=866
Only in Kazakh	24%	25%	24%	17%	18%
More in Kazakh than in Russian	6%	5%	6%	5%	4%
In Kazakh and Russian equally	30%	32%	22%	28%	27%
More in Russian than in Kazakh	12%	12%	13%	12%	11%

Only in Russian	27%	23%	29%	37%	38%

Let us move to the analysis of language preferences in media consumption in terms of certain age groups. Thus, in 2023 one can see a downtrend in all age groups in the share of media content consumed only in Russian and uptrend in the share of content in Kazakh. It is worth noting that even though many respondents prefer bilingual content, the analysis focuses on groups which choose to consume media content in one language to identify the key trends.

- In the **14-18** age group, in 2021, 50% preferred content in Russian only. By 2023, their share fell to 37%. The share of those consuming content in Kazakh increased from 11% to 21%.
- Among respondents aged **19-29** years in 2021, 48% chose only the Russian language, by 2023 this figure decreased to 33%. The share of those preferring the Kazakh language increased from 10% to 20%.
- In the group of **30-45** years old in 2021, 53% answered that they consumed content only in Russian. By 2023, this number fell to 27%. At the same time, the share of those choosing the Kazakh language increased from 7% to 24%.
- For respondents aged **46-60**, the share of content in Russian decreased from 48% in 2021 to 33% in 2023. Consumption in Kazakh increased from 12% to 20%.
- In the older group of **61-65** years old, 50% preferred Russian in 2021 and 26% in 2023. The share of the Kazakh language increased from 9% to 19%.

As can be seen from the above, in all ages there is a tendency to decrease the consumption of content in Russian and increase the share of the Kazakh language by 2023.

Table 1.2.7. *Language Preferences for Consuming Information from Different Sources by Different Age Groups*

Consumption Language	Year	14-18	19-29	30-45	46-60	61-65
Only in Kazakh	**2023**	↑ **21%**	↑ **20%**	↑ **24%**	↑ **20%**	↑ **19%**
	2021	11%	10%	7%	12%	9%
More in Kazakh than in Russian	**2023**	= **5%**	↓ **3%**	↑ **6%**	↑ **5%**	↑ **5%**
	2021	5%	5%	3%	3%	1%
In Kazakh and Russian equally	**2023**	↑ **23%**	↑ **25%**	↑ **28%**	↑ **30%**	↑ **32%**
	2021	18%	23%	23%	25%	30%
More in Russian than in Kazakh	**2023**	↓ **10%**	↑ **14%**	= **13%**	= **9%**	↑ **15%**
	2021	12%	12%	13%	10%	10%
Only in Russian	**2023**	↓ **37%**	↓ **33%**	↓ **27%**	↓ **33%**	↓ **26%**
	2021	50%	48%	53%	48%	50%

** Data on all sources (TV, radio, print and online media, Internet resources) were integrated into one overall response about language preferences and analyzed from a perspective of age groups.*

Among male and female audiences, there is also a significant decrease in the share of content consumed exclusively in Russian, and at the same time there is a significant increase in media consumption in the Kazakh language through all channels of information for both genders. For example, in 2021, the overwhelming majority of both genders favored Russian-language content in social networks, websites, print and online media, radio and television. By 2023, the situation has changed:

- **The share of Russian-only content consumption** decreases for men and women in all information channels: men from 41-59% in 2021 to ↓ 21-35% in 2023 and women from 41-55% in 2021 to ↓26-41% in 2023 with regard to all sources.
- **At the same time, popularity of Kazakh content is growing among both audiences**: men from 7-12% in 2021 to ↑19-28% in 2023 and women from 7-12% in 2021 to ↑15-22% in 2023 with regard to all sources.
- The most marked increase in interest in the Kazakh language is seen among men when reading printed and electronic publications (from 8% in 2021 to ↑ 28% in 2023).

it should be highlighted that, having compared data of 2023, it should be noted that despite the overall decline in the share of content in Russian, women (34%) began to use it more often than men (28%) across all channels of information. This observation is interesting given that in 2021, men (51%) were more likely to use Russian through all channels than women (49%).

Table 1.2.8. Language Preferences for Consuming Information from Different Sources Among Men and Women

	Consumption Language	Men		Women	
		2021	2023	2021	2023
Use social media	**Only in Kazakh**	**8%**	↑ **21%**	**8%**	↑ **16%**
	Only in Russian	59%	↓ 34%	55%	↓ 41%
Browse the Internet	**Only in Kazakh**	**7%**	↑ **19%**	**7%**	↑ **15%**
	Only in Russian	56%	↓ 35%	53%	↓ 39%
Read newspapers/magazines (print and online)	**Only in Kazakh**	**8%**	↑ **28%**	**10%**	↑ **21%**
	Only in Russian	55%	↓ 27%	51%	↓ 32%
Listen to the radio	**Only in Kazakh**	**12%**	↑ **27%**	**12%**	↑ **22%**
	Only in Russian	41%	↓ 21%	45%	↓ 26%
Watch TV	**Only in Kazakh**	**12%**	↑ **27%**	**10%**	↑ **21%**
	Only in Russian	42%	↓ 24%	41%	↓ 30%
TOTAL	**Only in Kazakh**	9%	↑ 24%	9%	↑ 19%
	Only in Russian	51%	↓ 28%	49%	↓ 34%

Preferences in News Sources and Analytics by Country/Region

In 2023 compared to 2021, there were significant changes in preferences of the audience in choosing countrywise and regional news/analytical programs in different media channels; if in 2021 the focus of attention of the audience was predominantly regional and urban media, then by 2023 the republican Kazakhstani media came to the fore.

- Thus, the share of those who prefer **national Kazakhstani media** increased in 2023 compared to 2021 through all channels: on the radio from 22% to 39%, in print media from 23% to 36%, on the Internet from 22% to 41%, on TV from 28% to 44%.
- At the same time, the share of those choosing **regional and urban Kazakhstani media** decreased: on the radio from 44% to 36%, in the press from 44% to 31%, on the Internet from 37% to 25%, on TV from 37% to 28%.
- Preference for **Russian** media also decreased: on the radio from 18% to 9%, in the press from 20% to 6%, on the Internet from 21% to 12%, on TV from 23% to 13%.
- The share of those who prefer **foreign** media also decreased through all channels.
- Moreover, the 2023 data show presence of an audience (11-20%) that does not turn to news and analytical programs, where the largest share of 20% is accounted for by the print media.

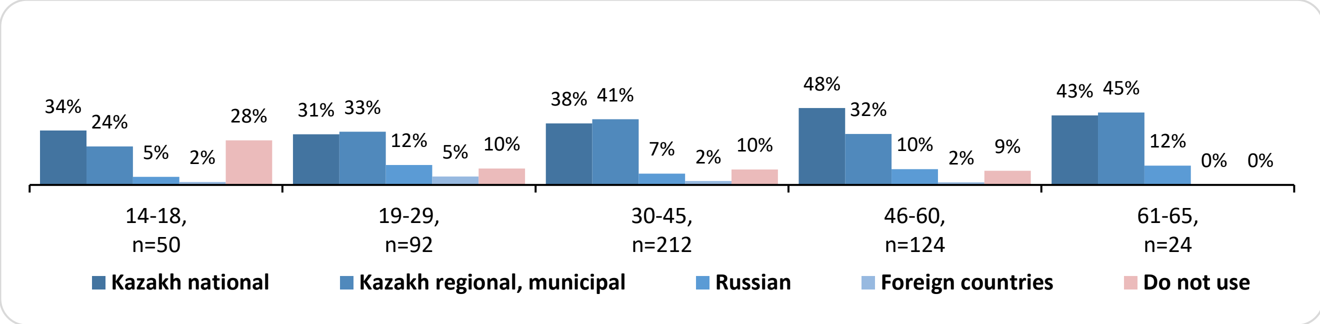
From there, one can see a trend of growing interest in the republican Kazakhstani media and decreasing interest in regional, Russian and foreign media. Such a shift may indicate the growing interest of the audience in the nationwide agenda and emerging role of the republican media in generation of the information field of Kazakhstan.

Table 1.2.9. News Preferences: Breakdown by Country and Media

	On the radio		In newspapers / magazines		On the web sites		On TV	
	2021	2023	2021	2023	2021	2023	2021	2023
Kazakh national	22%	↑ **39%**	23%	↑ **36%**	22%	↑ **41%**	28%	↑ **44%**
Kazakh regional, municipal	44%	↓ **36%**	44%	↓ **31%**	37%	↓ **25%**	37%	↓ **28%**
Russian	18%	↓ **9%**	20%	↓ **6%**	21%	↓ **12%**	23%	↓ **13%**
Foreign countries	8%	↓ **3%**	5%	↓ **4%**	10%	↓ **7%**	6%	↓ **2%**
Do not use	–	**11%**	–	**20%**	–	**13%**	–	**11%**
Not sure	*8%*	*3%*	*9%*	*2%*	*10%*	*2%*	*6%*	*2%*
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

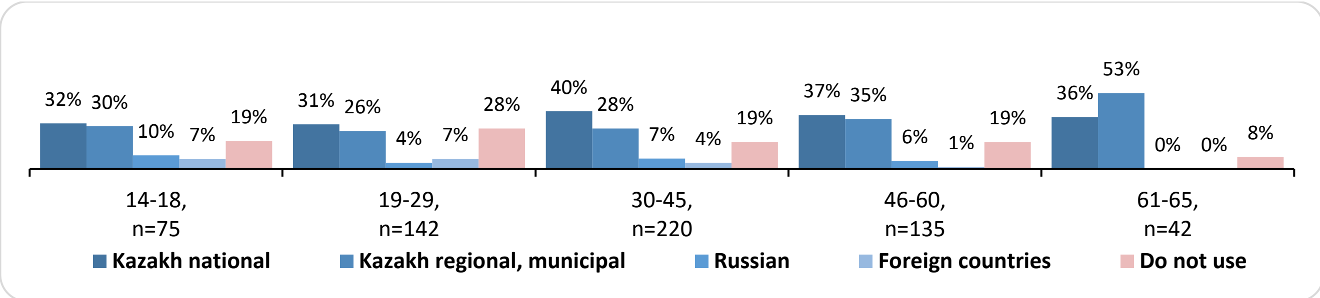
Analysis of the survey data from a perspective of age groups allows us to identify influence of the age factor on media preferences of the audience. Thus, one can see a growing interest in the segment of traditional radio broadcasting with regard to republican radio among young and older age groups (from 34% at 14-18 years old to 48% at 46-60 years old), while the share of those who do not listen to the radio is maximum among young people aged 14-18 years (28%).

Diagram 1.2.2. Preferences by Country/Region When Listening to News and Analytical Programs on the ***Radio*** *(2023 y.), N=502*



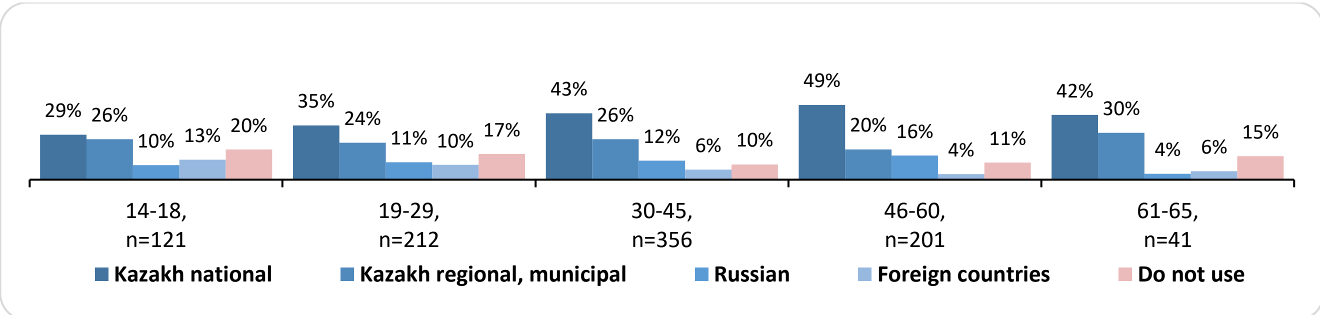
Similar dynamics can be found in the segment of print media: Interest in the national press is also growing among young and older age groups (from 32% at 14-18 years old to 40% at 30-45 years old), with the maximum share of those who do not read newspapers and magazines falling on the age of 19-29 years old (28%). At the same time, it is worth noting the relatively high share of readers of regional and municipal media outlets in the older age group of 61-65 years old (53%).

Diagram 1.2.3. Preferences by Country/Region When Reading News and Analytical Articles ***in Newspapers and Magazines (2023 y.)****, N=614*



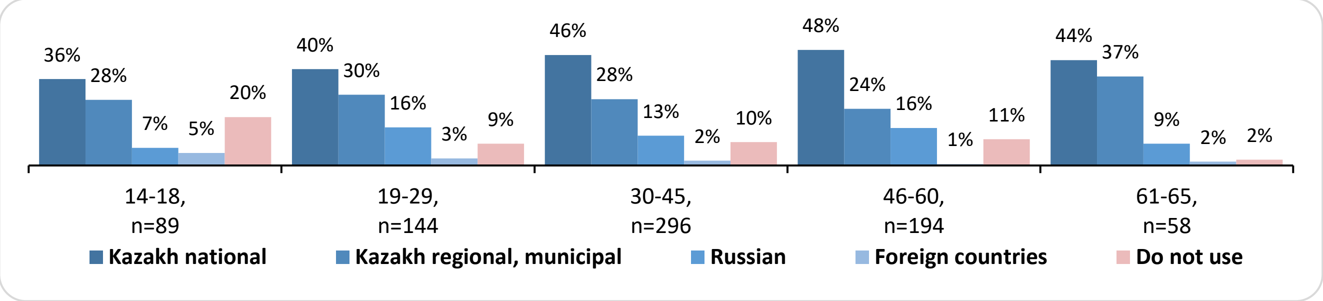
As for web sources, interest in national news sites is also consistently growing with the increasing age of respondents: if the group of 14-18 years old accounts for 29%, then among respondents aged 46-60 years old this figure increases to 49%. It is worth noting that young users of 14-18 years old more often turn to foreign sources on the Internet (13%) than the older generation (4-10%).

Diagram 1.2.4. Preferences by Country/Region When Reading News and Analytical Articles ***on the Internet (2023 y.)****, N=931*



On television, a gradual interest increase in republican media is also observed with age, where 36% in the group of 14-18 years old and 48% among the viewers of 46-60 years old. At the same time, the share of those who do not watch TV is higher in the youth audience of 14-18 years old (20%).

Diagram 1.2.5. *Preferences by Country/Region When Watching News and Analytical Programs* ***on TV (2023 y.)****, N=781*

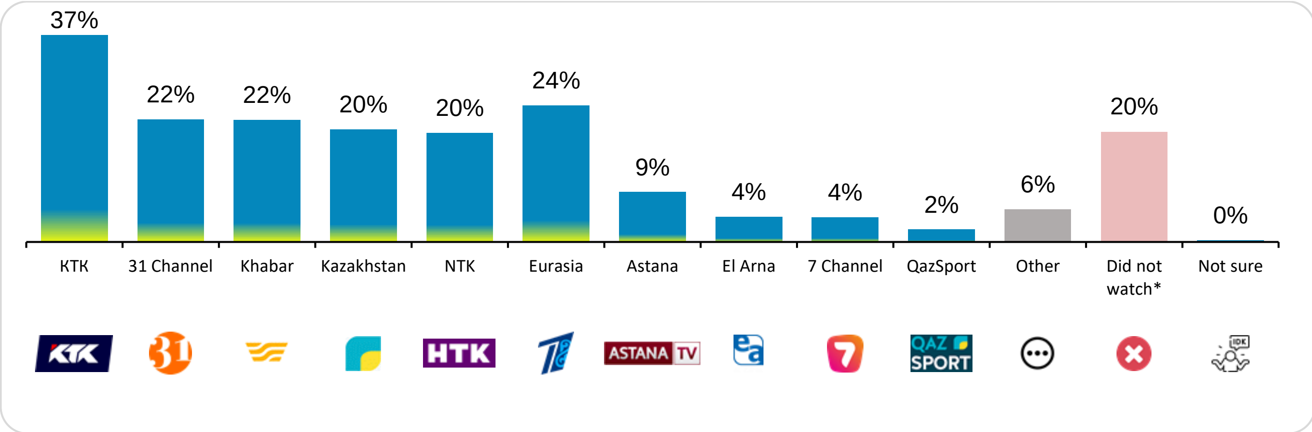


1.3. TV Broadcast

Kazakh TV Channels

National/Kazakh TV channels. According to respondents who watched Kazakh TV channels during the week before the survey, the leaders in viewers' preferences became the KTK (37%) owing to entertainment content, as well as leading news channels Eurasia (24%), 31 Channel (22%), Khabar (22%), Kazakhstan (20%) and NTK (20%). It should also be noted that a significant part of the audience (20%) did not watch TV during the week before the survey.

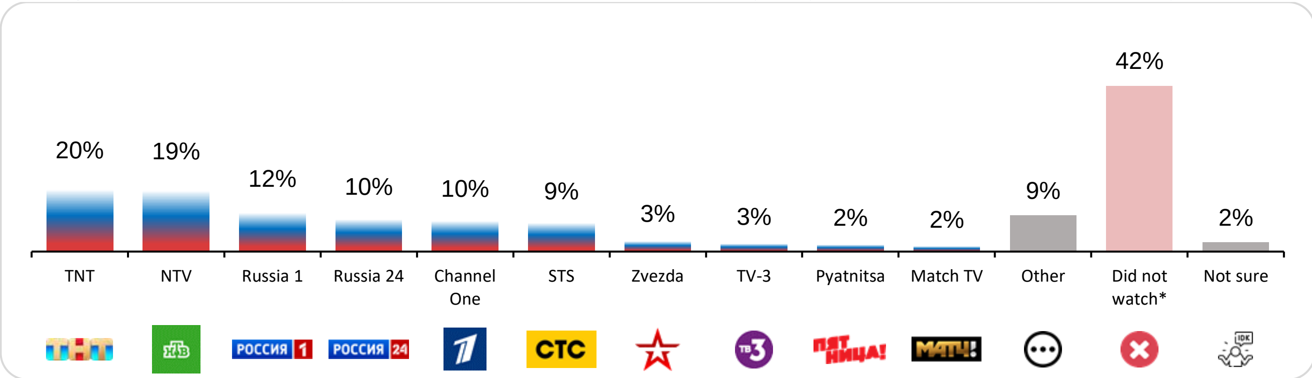
*Diagram 1.3.1. The Most Popular **Kazakh TV Channels** Watched by Respondents in the Last Week **(2023 y.)**, N=781*



** To obtain a truthful overview of television viewing, a list of available TV channels was not shown to respondents; the first 3 TV channels mentioned by a respondent were recorded. The amount is not equal to 100 percent.*

Russian TV channels. Following the analysis of TV viewing of the audience of Kazakhstan, let us consider the data about watching Russian TV channels by respondents. Among the respondents the entertainment channel TNT, which was watched by 20% of respondents last week, took the leading position in terms of popularity. Next follows the information channel NTV with 19% of the votes. News channels Russia 1 (12%) and Russia 24 (10%), All-Russian Channel One (10%) and entertainment STS (9%) run a close second. At the same time, almost half of all respondents (42%) did not watch Russian television at all within the specified period. In general, interest of the audience of Kazakhstan in Russian TV is noticeably lower than national TV channels.

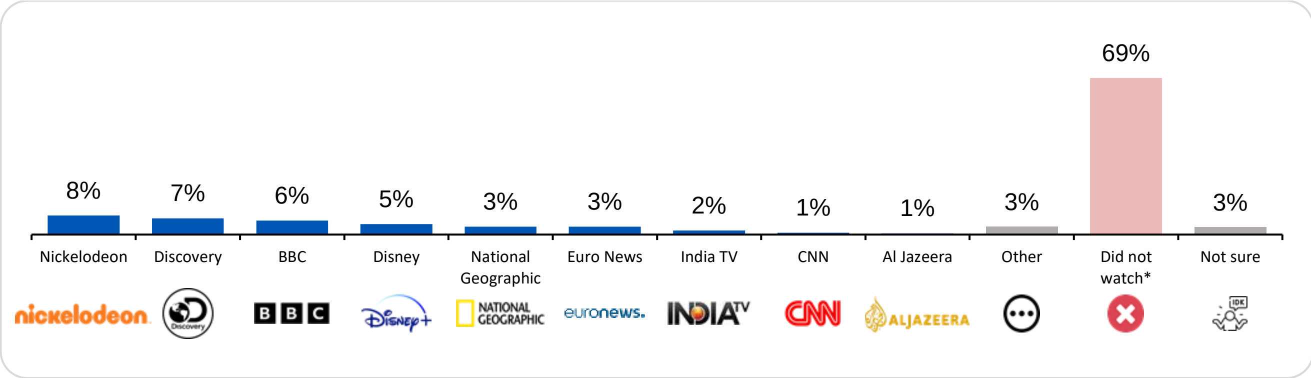
*Diagram 1.3.2. The Most Popular **Russian TV Channels** Watched by Respondents in the Last Week (**2023 y.)**, N=781*



** To obtain a truthful overview of television viewing, a list of available TV channels was not shown to respondents; the first 3 TV channels mentioned by a respondent were recorded. The amount is not equal to 100 percent.*

International TV channels. Among international channels, the leading position was taken by entertainment channel Nickelodeon, watched by 8% of respondents during the week. Next are Discovery (7%), BBC (6%), National Geographic (3%), and Disney (5%). The vast majority of respondents (69%) did not watch foreign TV channels at all during the stated period. Thus, despite certain popularity of some entertainment and educational foreign channels, in general the interest of the Kazakh audience to international channels is relatively low.

Diagram 1.3.3. *The Most Popular* ***International TV Channels*** *Watched by Respondents in the Last Week* ***(2023 y.)****, N=781*

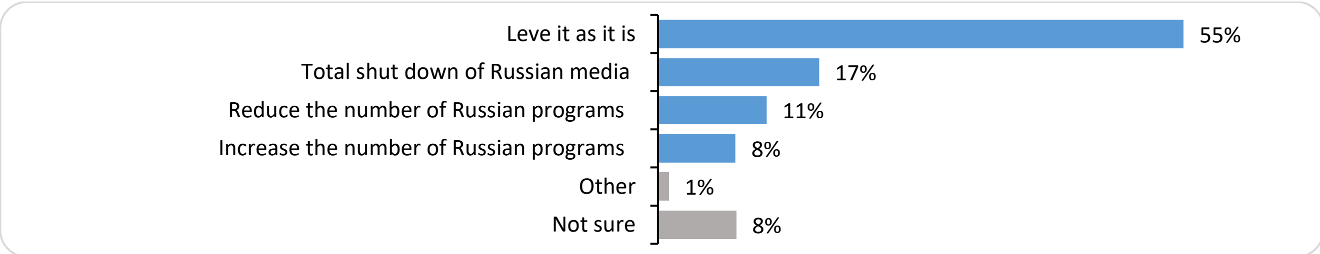


** To obtain a truthful overview of television viewing, a list of available TV channels was not shown to respondents; the first 3 TV channels mentioned by a respondent were recorded. The amount is not equal to 100 percent.*

Public Assessment of Russian Media Broadcasting Advantages in Kazakhstan

Results of the public opinion poll show that there is a wide range of views relating to broadcasting of Russian media in the Kazakh information space. Thus, the majority of respondents (55%) speak in favor of maintaining the current position of Russian media broadcasting in Kazakhstan and another 8% speak in favor of increasing the number of Russian programs. At the same time, a significant share of the audience suggests closing Russian media permanently (17%) and reducing the number of Russian news and analytical programs (11%).

Diagram 1.3.4. *Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan* ***(2023 y.)****, N=1005*



Thus, the majority of respondents are in favor of maintaining the presence of Russian media in one form or another. At the same time, almost one third of respondents believe it is necessary to reduce the volume of Russian broadcasting or completely ban it. One of the factors influencing this tendency may be the media consumption language of the audience: among those who prefer Kazakh-language content, the greatest number of supporters are in favor of completely closing Russian media (29-36%) and reducing the number of their programs (13-17%). Meanwhile, the availability of Russian information content is important for the Russian-speaking audience, namely: there are considerably more supporters of maintaining (66-68%) and even expanding (8-13%) the presence of Russian media.

Table 1.3.1. *Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by the Language Preferred* ***(2023 y.)***

	Only in Kazakh	More in Kazakh than in Russian	In Kazakh and Russian equally	More in Russian than in Kazakh	Only in Russian
Leave it as is	30%	44%	59%	66%	68%
Increase the number of Russian programs	8%	8%	4%	8%	13%
Total shut down of Russian media	36%	29%	16%	7%	5%
Reduce the number of Russian programs	13%	17%	15%	9%	7%
Other:	*1%*	*0%*	*0%*	*1%*	*1%*
Not sure	*11%*	*3%*	*6%*	*8%*	*5%*
Total	**100%**	**100%**	**100%**	**100%**	**100%**

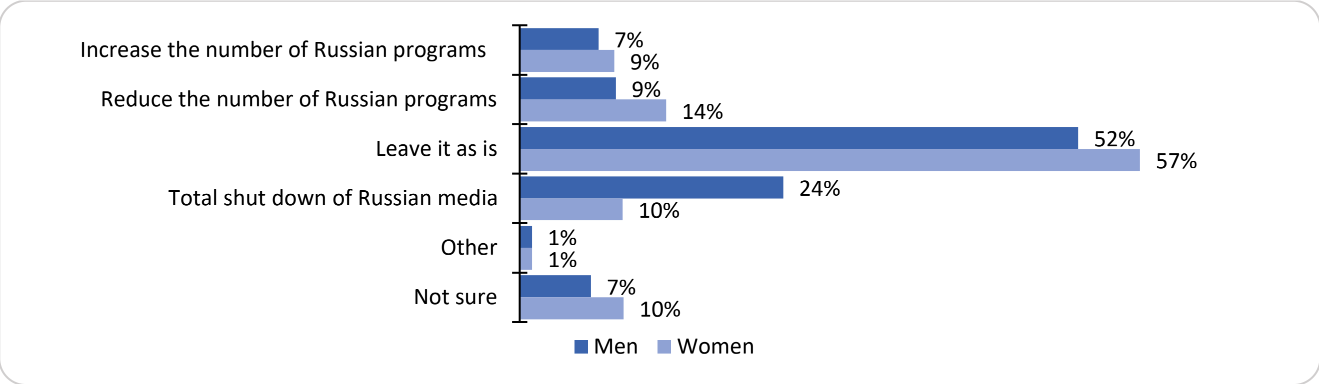
The survey results show that there are differences in the assessment of Russian media broadcasting advantages in Kazakhstan depending on educational level of respondents. In general, supporters of preserving Russian broadcasting prevail, with 52% of respondents with secondary education and 61% with incomplete secondary education. However, as the level of education increases, the share of respondents in favor of complete shutdown of Russian content broadcasting increases, with 0% with primary education and 20% with secondary and higher education. At the same time, the highest support for the Russian presence expansion is observed in the group with primary education (21%), while among those with higher education there are only 5%. Thus, as the educational level increases, the approval for expansion of Russian broadcasting decreases and calls for its restriction increase. This may witness a greater criticality level and independence of judgment in groups with higher levels of education.

Table 1.3.1.1. *Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by Educational Level* ***(2023 y.),*** *N=1005*

	Primary	Incomplete secondary	Secondary	Vocational technical	Incomplete higher	Higher
Leave it as is	60%	61%	52%	56%	57%	56%
Increase the number of Russian programs	21%	5%	9%	10%	8%	5%
Total shut down of Russian media	0%	13%	20%	11%	13%	20%
Reduce the number of Russian programs	10%	10%	12%	14%	11%	10%
Other	*0%*	*0%*	*1%*	*1%*	*3%*	*1%*
Not sure	*10%*	*10%*	*6%*	*8%*	*8%*	*9%*
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

There are also certain gender differences in assessing the Russian media broadcasting advantages in Kazakhstan. In both groups, both among men and women, supporters of maintaining the current situation prevail (52% and 57%, respectively). However, among men, the share of those in favor of a complete shutdown of Russian broadcasting is significantly higher, with 24% versus 10% among women. At the same time, women more often support a reduction in the number of news and analytical programs, with 14% versus 9% among men. Expansion of the Russian presence is approved by approximately equal shares of respondents in both groups, with men - 7% and women - 9%. Therefore, men demonstrate a more categorical stance on Russian broadcasting, while women tend to support moderate regulation, but not a complete ban.

Diagram 1.3.4.1. *Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by Gender (2023 y.)*



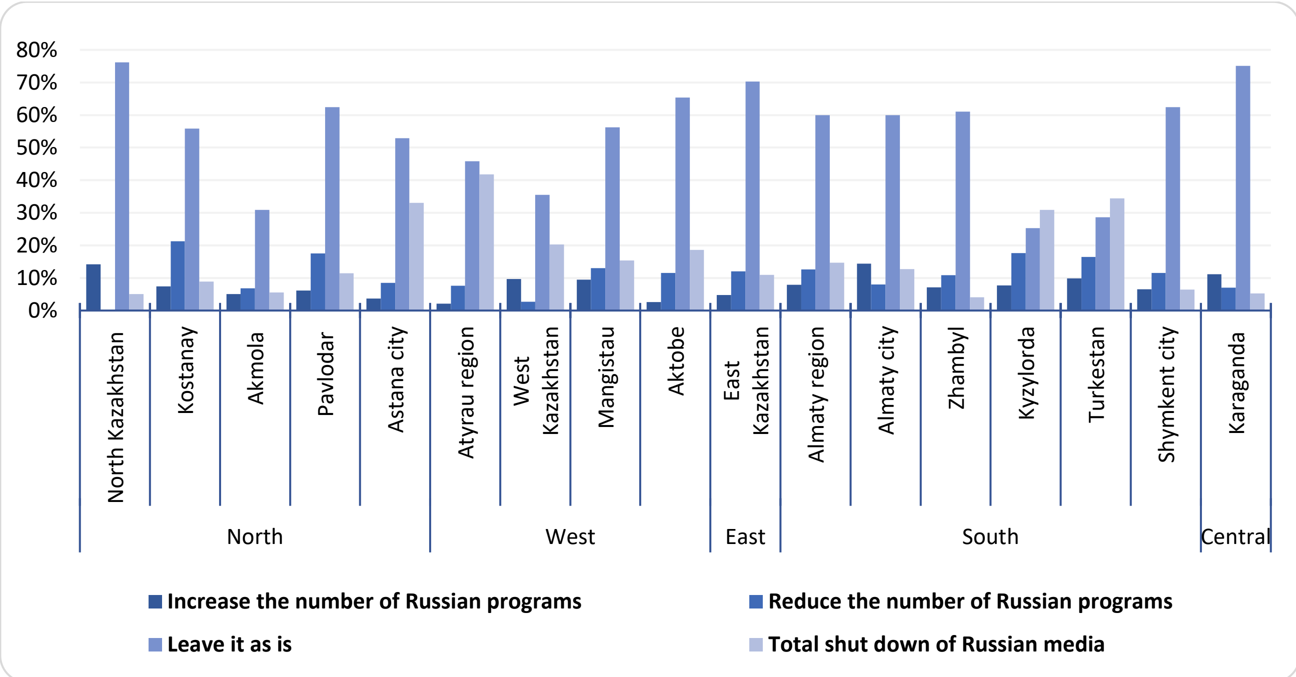
Analysis of the survey data by age groups also reveals some age peculiarities in assessing the Russian media broadcasting in Kazakhstan. In all ages, supporters of preserving the current status of Russian media broadcasting prevail (52-56%). However, the largest share of respondents in favor of a complete ban on Russian broadcasting is observed in the older age groups of 46-60 years old (20%) and 61-65 years old (19%). In the meantime, the expansion of Russian presence is more often supported by respondents aged 30-45 (10%). Reduction of news and analytical programs is suggested by young people aged 14-18 (17%). Thus, as the age of respondents increases, the support for strong measures regarding Russian broadcasting grows. Young people, on the other hand, speak more often in favor of moderate regulation.

__Table 1.3.1.2.__ Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by Age Groups __(2023 y.)__

	Age				
	14-18	**19-29**	**30-45**	**46-60**	**61-65**
Increase the number of Russian programs	3%	7%	10%	8%	6%
Reduce the number of Russian programs	17%	11%	10%	12%	9%
Leave it as is	55%	56%	55%	52%	55%
Total shut down of Russian media	15%	12%	17%	20%	19%
Other:	1%	1%	1%	2%	0%
Not sure	8%	12%	7%	6%	11%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

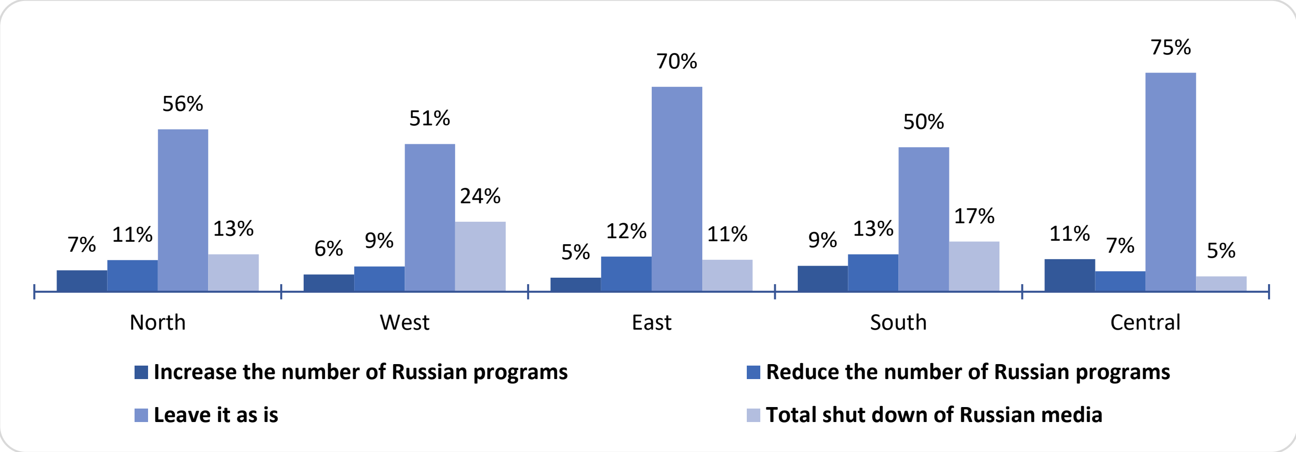
One can also see different opinions relating to Russian media broadcasting advantages in different regions of Kazakhstan. For example, the greatest support for Russian presence expansion is observed in the cities of Almaty (14%) and North Kazakhstan Oblast (14%). Residents of Kostanay region (21%), Kyzylorda (18%) and Pavlodar regions (18%) are more likely to support the reduction of news programs. Maintaining the current situation is supported mainly in East Kazakhstan (70%), Karaganda (75%) and North Kazakhstan (76%) regions. Respondents from Atyrau (42%), West Kazakhstan (20%), Kyzylorda (31%) regions and Astana city (33%), more often propose a complete ban on Russian media.

__Diagram 1.3.4.2.__ Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by Regions __(2023 y.)__



Survey study with due consideration of geographical zones of Kazakhstan also reveals certain regularities in the way respondents assess the advantages of Russian media broadcasting. In particular, East and Central Kazakhstan have the highest rate of supporters of maintaining the current status of Russian media broadcasting, with 70% and 75%, respectively, which significantly exceeds similar indicators for other regions of the country. Moreover, Central Kazakhstan has the highest support level with regard to expanding the Russian media presence, namely 11% of respondents were in favor of increasing the number of Russian programs. At the same time, here one can see the smallest share of respondents proposing a complete ban on Russian media, only 5%. Whereas, the reduction of news and analytical programs is more often proposed by residents of Eastern (12%) and Southern (13%) Kazakhstan. A complete ban on Russian broadcasting is supported mainly in the Western (24%) and Southern (17%) regions.

Diagram 1.3.4.3. Opinions of Respondents on the Necessity of Russian Media Broadcasting in Kazakhstan by Geographic Location of Regions ***(2023 y.)***



** Averages of regions are distributed according to their geographical location.*

Conclusion. The analysis conducted in terms of educational level, gender, age groups, regions and geographical zones of Kazakhstan shows that support for expansion of Russian media presence in Kazakhstan's information space is peculiar to certain sociodemographic and regional groups of the population. In particular, the greatest approval of increasing the number of Russian programs is observed among respondents with a low level of education, young people, residents of Almaty and North-Kazakhstan region, as well as Central region of Kazakhstan. However, with increase of educational level and age of respondents, as well as in Western and Southern regions of the country, support for expansion of the Russian media presence decreases. Moreover, sentiments in favor of strong measures to completely ban Russian media in Kazakhstan are increasing among these groups. Thus, supporters of a greater Russian media presence are generally characterized by a lower level of education, young age, and residence in Central, Northern regions and large cities of Kazakhstan.

TV Preferences of Viewers

Dynamics analysis of viewer preferences on television in recent years shows the presence of several key trends.

News and analytics. In news and analytical broadcasting sector, one can see an increase in the audience's interest in central Kazakh TV channels (from 35% in 2021 to 45% in 2023). However, compared to 2019 (58%), the demand for this type of content has decreased. The loss of viewership with regard to regional news is even more noticeable, with a drop from 58% in 2019 to 20% in 2023. Share of the audience that prefers international news is also declining (from 25% in 2019 to 15% in 2023). As for analytical programs and talk shows, they attract only 10-13% of the audience and remain stable during 2019-2023.

Entertainment content. In the entertainment content sphere, one can see a decidedly mixed picture. On the one hand, interest in feature films and TV series is declining, from 51% in 2019 to 43% in 2023. On the other hand, other types of TV entertainment maintain high popularity and even increase it. Music programs show an increased popularity, while in 2019 they were preferred by 18% of the audience, by 2023 this figure has risen to 27%. Comedy shows also enjoy strong demand, although their ratings have slightly decreased by 2023 compared to 2019 (from 29% to 23%). Sports broadcasting remain consistently popular content, being preferred by about a quarter of respondents (23% to 28%). Reality TV shows remain a niche product, despite a rise in popularity (from 3% to 11%).

Educational and scientific content. Certain positive dynamics is demonstrated by a segment of educational and scientific content. In recent years, interest in educational programs has grown significantly, from 4% in 2019 to 13% in 2023. The demand for various informative shows remains stable; their rating varies in the range of 14-18%.

Niche content. As for niche content like children's programs, cooking programs and morning shows, there is a general trend of a small but steady increase in popularity between 2019 and 2023. At the same time, the overall share of such content in the structure of audience preferences is low, on average 10-17% for these types of content in 2019-2023. It should be mentioned that only 5-6% of the audience gives preference to narrowly specialized genre of religious programs.

Table 1.3.2. *Respondents' preferences, what they usually watch on TV*

	2019, N=927	2021, N=945	2023, N=781
News on Kazakh central TV channels	58%	↓ 35%	↑ **45%**
TV series and feature films	51%	↓ 47%	↓ **43%**
Entertainment (comedy) shows, telegames, completion shows	29%	↓ 28%	↓ **27%**
Music shows, concerts	18%	↑ 24%	= **24%**
Sportscast, broadcasting	25%	↑ 28%	↓ **23%**
News on local regional TV channels	58%	↓ 23%	↓ **20%**
Children's programs, animated cartoons	13%	↑ 15%	↑ **17%**
Cooking shows	10%	↑ 16%	↓ **15%**
News on international TV channels	25%	↓ 18%	↓ **15%**
Morning shows	13%	↑ 14%	↑ **15%**
Science TV shows, documentaries	15%	↑ 18%	↓ **14%**
News on Russian TV channels	–	26%	↓ **14%**
Educational shows	4%	↑ 11%	↑ **13%**
Reality shows	3%	↑ 14%	↓ **11%**
Analytical programs, talk shows	13%	= 13%	↓ **10%**
Religious programs	6%	↓ 5%	↑ **5%**

**The amount is not equal to 100 percent as respondents could mark more than one answer option.*

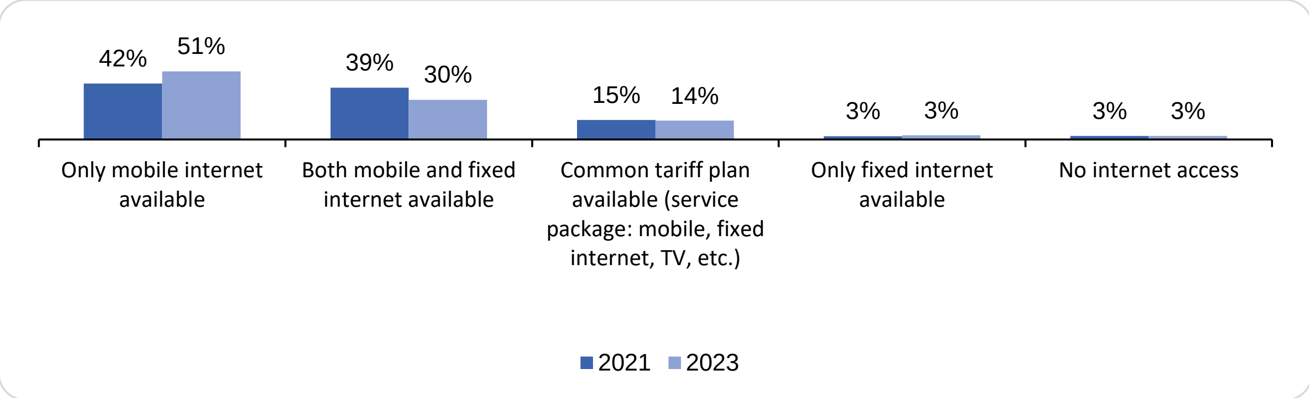
Thus, in 2023, preferences of the audience in Kazakhstan are focused on news, artistic content, as well as entertainment and sports programs. Considering dynamics of recent years, there is a decline in interest in news on TV; the demand for educational content is growing. Share of those who prefer TV series and movies is decreasing, while popularity of entertainment programs remains.

1.4. Internet

Internet Connectivity

Comparing 2021 and 2023, it can be noted that total audience share with Internet access remains stable at around 97% of respondents. Analysis of Internet access type dynamics shows the stable leadership of the mobile option; if in 2021 its share was 42% of respondents' answers, then in 2023 it increased to 51%. The second place is stable held by combined access, i.e. a combination of mobile and fixed access, but its indicator decreased from 39% in 2021 to 30% in 2023. Relatively stable positions are held by a common tariff plan, with 14-15% by year. The ranking is closed by the least popular options – only fixed access (3%) and complete absence of Internet access (3%). Thus, the overall picture of network connection types changes insignificantly, with a tendency to increase the share of mobile access.

Diagram 1.4.1. *Distribution of Internet Users with Different Connection Methods, N=1005*



The analysis of Internet access in different age groups shows that mobile access is consistently leading in all categories, with its share showing significant growth from 2021 to 2023 in all age groups. At the same time, the data for 2021 and 2023 show a clear downward trend in overall internet access as the age of respondents increases. This is particularly evident in the older age groups of 46-65 years, where one can see a significant increase in the number of those who have no access to the internet at all - from 5% to 16% depending on age.

Table 1.4.1. *Distribution of Internet Users with Different Connection Methods by Age*

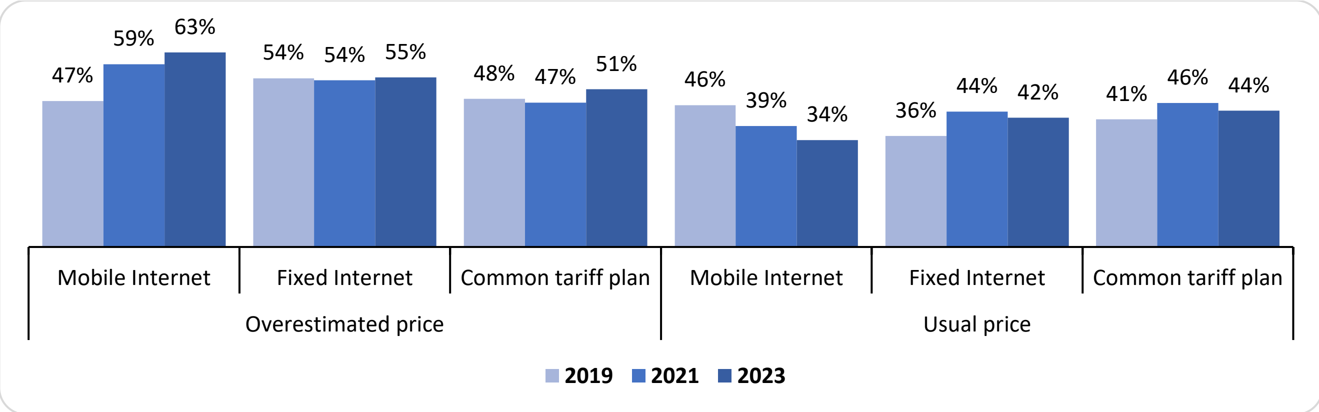
Access type	Year	Age				
		14-18	19-29	30-45	46-60	61-65
Only mobile internet available	**2023**	↑ **51%**	↑ **52%**	↑ **53%**	↑ **48%**	↑ **44%**
	2021	40%	41%	42%	42%	39%
Both mobile and fixed internet available	**2023**	↓ **34%**	↓ **28%**	↓ **31%**	↓ **29%**	= **21%**
	2021	46%	41%	39%	36%	21%
Common tariff plan available (service package: mobile, fixed internet, TV, etc.)	**2023**	↑ **12%**	↑ **17%**	↓ **12%**	↑ **15%**	↓ **11%**
	2021	10%	16%	18%	11%	12%
Only fixed internet available	**2023**	↓ **2%**	↑ **3%**	↑ **3%**	↓ **3%**	↓ **8%**
	2021	3%	2%	1%	4%	11%
No internet access	**2023**	**1%**	**0%**	**1%**	**5%**	**16%**
	2021	1%	0%	1%	6%	16%

Internet Payment

The results show that the price tension of mobile Internet access in Kazakhstan is growing. In particular, for the period from 2019 to 2023, there is a clear trend of increasing the share of **mobile Internet** users who consider its cost overpriced (from 47% to 63%), while the share of those who consider prices not too expensive decreases (from 46% to 34%). At the same time, the situation in respect with **fixed wireless Internet** remains relatively stable, i.e. the share of those who consider the prices overestimated here falls in the range of 54-55% throughout all the periods under review, with 36-44% of fixed wireless Internet users believing that the prices are not overestimated. The lowest level of tension relating to prices is observed in the segment of **common tariff plans**, including mobile, fixed Internet and TV services; here the share of those dissatisfied with prices ranges from 47 to 51% in different periods, with 41-46% of tariff plan subscribers believing that prices are not too expensive.

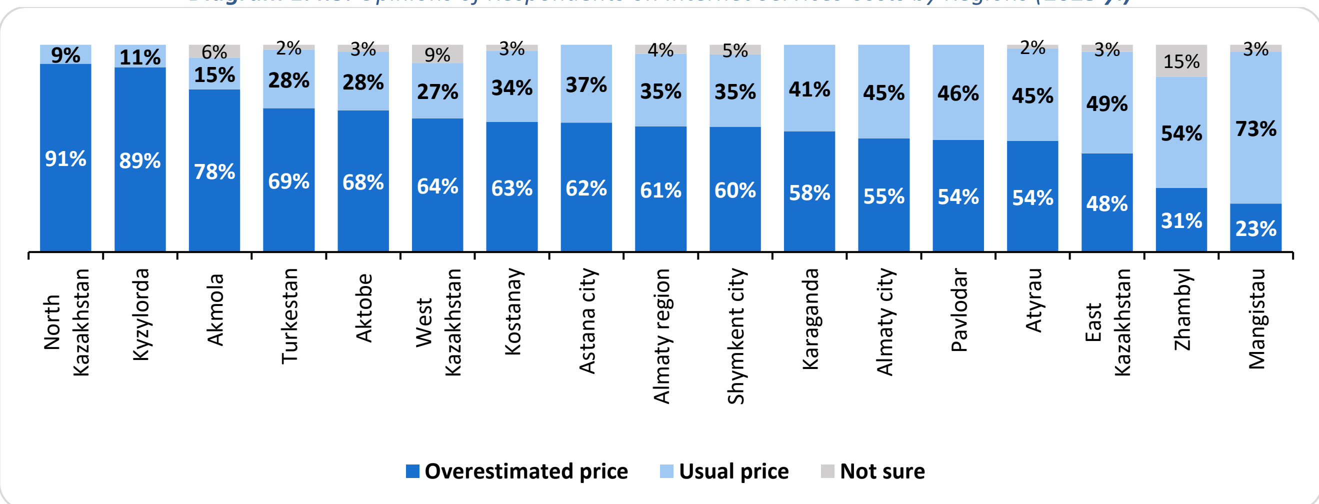
Summarizing the results, we can conclude that the prevailing opinion among Internet users of Kazakhstan is that prices for Internet access services are overvalued, with the most dynamic growth in the share of dissatisfied with prices for Internet services in the mobile access market.

Diagram 1.4.2. *Opinions of Respondents on Internet Services Costs*



Survey analysis on Internet services costs estimate in the context of regions of Kazakhstan shows the presence of significant differences in opinions of the population of different regions. For example, the highest share of respondents who consider prices to be overestimated can be seen in North Kazakhstan (91%), Kyzylorda (89%) and Akmola (78%) regions. At the same time, Mangistau (23%) and Zhambyl (31%) regions record the lowest percentage of such answers. Thus, the data indicate the presence of distinct regional differences in the perception of Internet providers' pricing policy.

Diagram 1.4.3. *Opinions of Respondents on Internet Services Costs by Regions (**2023 y.)***



** Data are obtained by means of averaging the indicators by connection types – mobile, fixed and tariff plans.*

Online Activity

According to the evaluation results of online activity level in Kazakhstan over the past few years, there have been significant changes in audience preferences. Over the period from 2019 to 2023, the most notable growth in popularity was demonstrated by **TV content watching via the Internet**, from 20% to 79% of respondents. In contrast, **social media communication** lost the most audience share, dropping from 79% in 2019 to 58% in 2023. There was also a 20 percentage point drop (from 75% in 2019 to 55% in 2023) in the share of those who **read news online**. The audience's interest in **watching entertaining video content in the form of movies and TV series** remains consistently high throughout the analyzed period: in 2019, 71% of respondents watched such content, in 2021 - 55%, in 2023 - 67%.

Besides, we can see a decline in a number of segments of online activity: **use of e-money to pay for goods** fell from 21% in 2021 to 17% in 2023; share of **online learners** fell from 22% to 15%; **applying for government services** fell from 15% to 11%; **visiting thematic web portals** fell from 14% to 6%. No significant dynamics was observed in other forms of Internet activity.

Thus, there is a steady increase in the video content popularity, especially watching TV programs online, due to the growing popularity of streaming platforms and the convenience of content selection. At the same time, interest in social media, news and a number of other Internet services in the sphere of commerce, education and public services is decreasing.

Table 1.4.2. *Online Activities of Respondents in the Last Month (as from the date of survey)*

	2019, N=1000	2021, N=1104	2023, N=915
Watching TV shows	–	20%	↑ **79%**
Watching TV series/ movies	71%	↓ 55%	↑ **67%**
Social networking	79%	↓ 63%	↓ **58%**
Reading online news	75%	↓ 59%	↓ **55%**
Using search engines (Yandex, Google, etc.)	48%	↓ 40%	↑ **41%**
Downloading, music listening, watching video	–	33%	↑ **33%**
Managing bank account online	27%	↑ 28%	↑ **31%**
Posting personal photos and videos	22%	↑ 24%	↑ **27%**
Purchasing goods, services, tickets online	41%	↓ 26%	= **26%**
Personal financial management (including but not limited to credit facilities, mortgage loans, investments)	–	–	**22%**
Reading books online	20%	↓ 19%	↓ **17%**
Payment for goods/services with e-money (Yandex.Money, QIWI Wallet, Web Money, etc.)	–	21%	↓ **17%**
Using cloud services (Yandex Disc, Google Disc, etc.)	15%	= 14%	↑ **16%**
Studying online	21%	↑ 22%	↓ **15%**
Job search online	12%	↑ 13%	= **14%**
Applying for government services online	–	15%	↓ **11%**
Online work	–	11%	= **11%**
Visiting thematic web portals (hobby, business, parenting)	–	14%	↓ **6%**
Personal blogging	8%	↓ 5%	= **5%**
E-participation in civic engagement (create/sign online petitions, participate in discussions about laws before they are passed)	–	3%	= **3%**

**Amount is not equal to 100 percent as respondents could mark more than one answer option.*

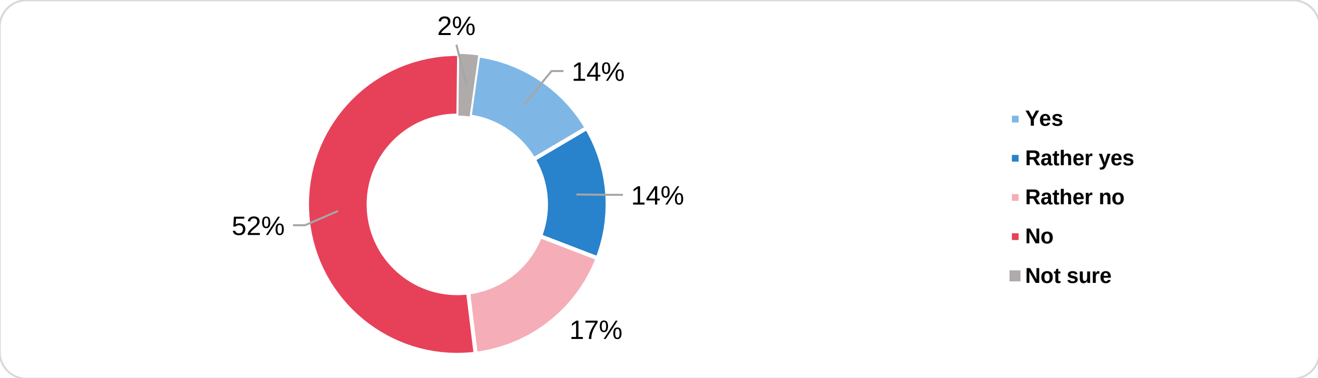
Having analyzed the data in terms of age groups, it can be noted that with increase of age one can see a tendency to decrease activity in almost all types of Internet activity. At the same time, the following significant differences in priorities of Internet use among different generations can be distinguished as follows:

- For example, young people aged 14-18 (32%) and 19-29 (21%) are most interested in online education.
- At the same time, managing a bank account (35-36%), personal finances (24-28%) and paying for services with electronic money (18-19%) via the Internet are most relevant for respondents aged 19-45. Perhaps, the more active use of online finance management by this age group is due to its increased financial activity compared to other generations.

Willingness to Pay for a Quality Copyright Product

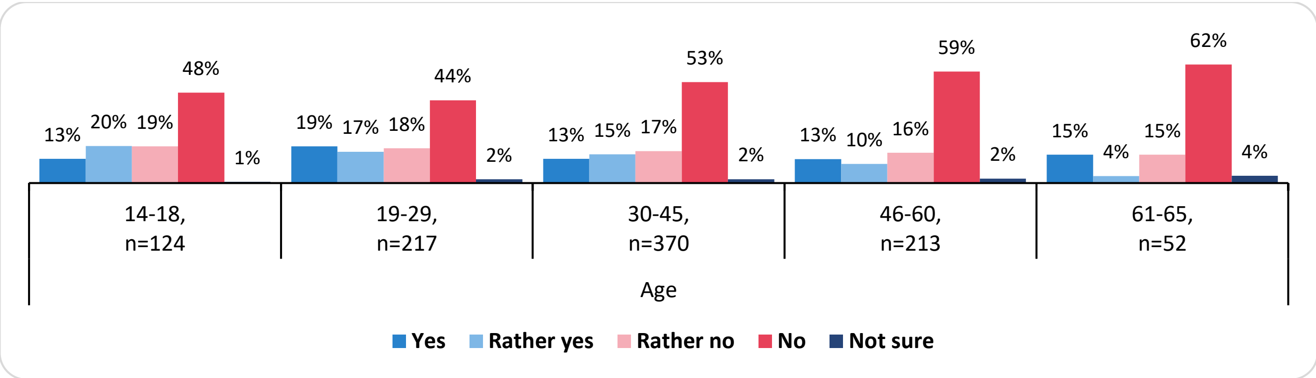
The survey results demonstrate a mixed attitude of the audience towards willingness to pay for access to quality content. On the one hand, the majority of respondents were against this possibility, where 52% of survey participants categorically rejected the idea of financial support for media content. On the other hand, one third of respondents are still ready to invest in intellectual and copyright product which is interesting for them, 14% chose the option "Yes" and the same number chose "Rather yes". Another 17% take an intermediate position, remaining indecisive. Thus, despite the dominance of skepticism towards paid content, the data also indicate a potentially significant demand for it among some part of the audience.

Diagram 1.4.4. *Willingness to Pay for a Quality Copyright Product* ***(2023 y.)****, N=1005 (in percent)*



A more detailed analysis by age groups reveals some nuances. Thus, the youngest age categories (14-18 and 19-29 years old) have the highest share of positive responses, with 33% and 36% respectively. This indicates that young people are more loyal to the idea of paid content. At the same time, in the middle age group (30-45 years old) the share of positive answers decreases to 28%, and in the older groups (46-60 and 61-65 years old) this indicator is even lower, with 23% and 19% respectively. Summing up what has been said, as the age of respondents increases, there is a steady decrease in their willingness to pay for content. Probable reasons are more conservative views and less involvement of older generations in the modern media environment.

Diagram 1.4.5. *Willingness to Pay for a Quality Copyright Product Among Age Categories* ***(2023 y.)****, N=1005*



Analyzing the data in terms of respondents' financial situation allows us to see another pattern, i.e. the higher living standard of respondents, the greater the share of those who are well disposed to the idea of financial support for content. Thus, among the groups with no financial difficulties and sufficient income, these figures are 34% and 49% respectively. As the financial wealth of respondents decreases, there is a tendency to decrease the share of those who are favorably disposed to paid content and increase the share of those who are against this possibility. This may be due to a more balanced and rational approach to expenditures in conditions of limited income. Thus, the audience's ability to pay is an important factor in its loyalty to consumption of paid content; therefore, the higher the income, the greater the willingness to spend on intellectual and quality media products.

Table 1.4.3. Willingness of Respondents to Pay for Quality Content Access by Living Standards *(2023 y.)*

	Current living standard					
	We do not have any financial difficulties, n=119	We have enough money to cover everything, n=164	We can buy basic appliances, n=316	We have enough to buy food and clothes, n=204	We have enough to buy food, n=37	We don't always have enough money even for food, n=32
Yes	15%	25%	13%	12%	15%	6%
Rather yes	19%	24%	13%	11%	5%	9%
Rather no	21%	15%	21%	10%	18%	10%
No	42%	34%	50%	65%	62%	75%
Not sure	*2%*	*2%*	*2%*	*2%*	*0%*	*0%*
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Online Content Consumption and Payment

A. Online media preferences of the audience. Entertainment and news genres dominate in Kazakhstan's Internet segment, while educational and analytical materials are not in popular demand. Thus, the survey results in 2023 show that the majority of respondents prefer to watch movies/TV series (72%), listen to music (69%) and read news (63%). At the same time, demand for educational (37%) and analytical content (24%) is much lower.

B. Consumption of paid digital content. Although a significant proportion of Kazakhstan's Internet users actively consume various types of online content, only a small proportion of those who consume certain forms of digital content currently pay for access to them. For example, among those who watch movies and TV series online, only 19% pay for subscriptions to video services. The situation is similar with music content, only 18% of listeners use paid services. Share of users paying for content is a bit higher among gamers (21%), consumers of online educational content (20%), and among readers of books and podcasts (19-22%). Therefore, we can say that paid content makes a smaller share of online media consumption in Kazakhstan, despite the demand for different types of content. The audience is mainly focused on free entertainment and information.

C. Willingness to pay. While the vast majority of respondents do not currently pay for access to online content, their willingness to pay for a variety of content types in the future is also low. For example, among those respondents who indicated that they do not currently pay for access to movies and TV series online, only 12% expressed a willingness to pay for it in perspective. The situation with music content is similar, only 12% are ready to pay for it in the future. The greatest potential willingness to pay is seen among readers of books (23%), consumers of online educational content (22%) and listeners of podcasts (17%). However, the overwhelming majority prefer free sources.

Accordingly, despite the demand for various online content, which is actively consumed by the Internet audience, the prospects for significant growth of paid content and revenues of this segment of the media market in Kazakhstan do not look very high. Consumers are used to free content and are in no hurry to change their habits.

Table 1.4.4. *Online Content Consumption and Payment* ***(2023 y.)***

Types of content:	A. Online usage:			B. Already paying for access:			C. Ready to pay for access:		
	N	Yes	No	*N*	Yes	No	*N*	Yes	No
Movies/TV series	*N=976*	72%	28%	*N=700*	19%	81%	*N=564*	12%	88%
Listening to music	*N=976*	69%	31%	*N=669*	18%	82%	*N=545*	12%	88%
News	*N=976*	63%	37%	*N=619*	7%	93%	*N=572*	13%	87%
Educational programs	*N=976*	37%	63%	*N=368*	20%	80%	*N=294*	22%	78%
Games	*N=976*	34%	66%	*N=328*	21%	79%	*N=261*	6%	94%
Reading books, audio books	*N=976*	32%	68%	*N=317*	22%	78%	*N=245*	23%	77%
Analytics	*N=976*	24%	76%	*N=235*	12%	88%	*N=206*	9%	91%
Listening to podcasts	*N=976*	19%	81%	*N=188*	19%	81%	*N=153*	17%	83%

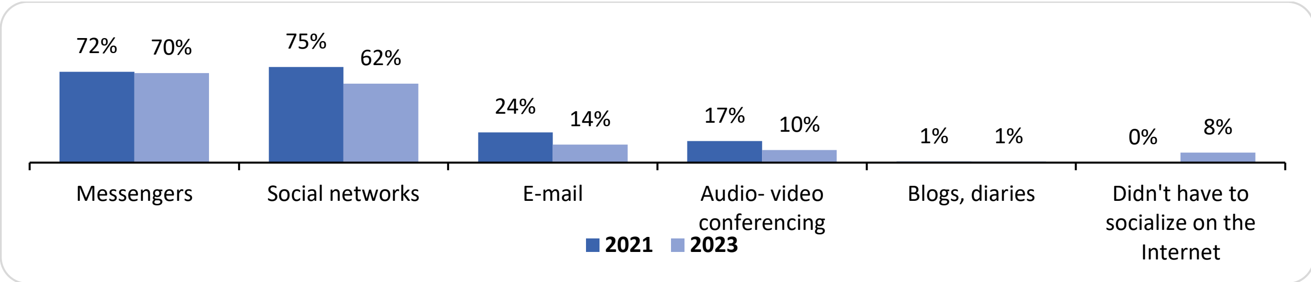
** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

1.5. Social Networks

Online Communication

Analyzing the issue about the ways used by respondents to communicate on the Internet in the past month, it can be seen that there have been some changes in the structure of Internet communication over the past two years. During the period under study, **messengers** keep the leading position as a channel of online communication, they were chosen by 70% and 72% of respondents in 2023 and 2021, respectively. The second place is steadily occupied by **social networks**, but their popularity decreased from 75% to 62%. One can also see a significant decrease in the share of **email** users, from 24% to 14% and **audio-video conferencing**, from 17% to 10%. Probably, decrease in the use of e-mail and videoconferencing is linked to the end of the COVID-19 pandemic and rejection of forced remote work. It is worth noting that the proportion of the audience **who did not use the internet to communicate** throughout the month before the survey was 8% in 2023. Thus, there is a negative trend in the diversity of online communication and an increasing concentration of the audience in messengers.

Diagram 1.5.1. *Ways of Online Communication Used by Respondents in the Last Month as From the Date of Survey*

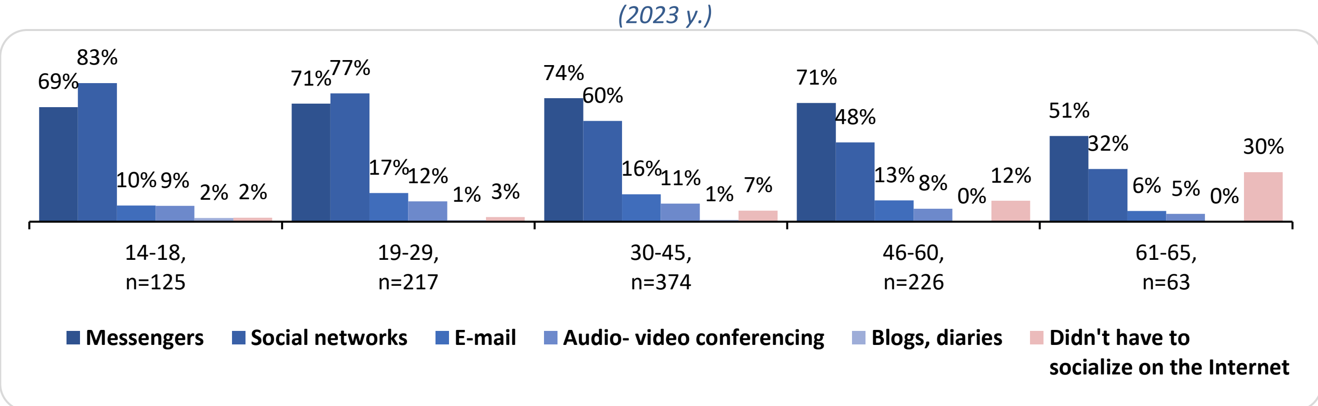


** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Data analysis by age groups reveals a regular decrease in the diversity and intensity of online communication with increase of age. At the same time, the following significant differences in the priorities of online interaction among different generations can be distinguished as below:

- Although messengers and social media remain the most popular channels of online communication in all age groups, their share consistently decreases from young people to older respondents, reaching a minimum in the group of 61-65 years old.
- The maximum share of social networks use is observed in the youngest group of 14-18 years old (83%).
- Respondents of 19-29 (17%) and 30-45 years old (16%) have higher rates of email usage compared to the younger and older groups, which may be linked to the necessity for business communication via email.
- Almost half of those who have not communicated online are from the older 46-65 year old groups (42%), confirming thereby that older generations are less involved in online communication.

Diagram 1.5.2. *Ways of Online Communication Used by Respondents in the Last Month as From the Date of Survey by Age (2023 y.)*

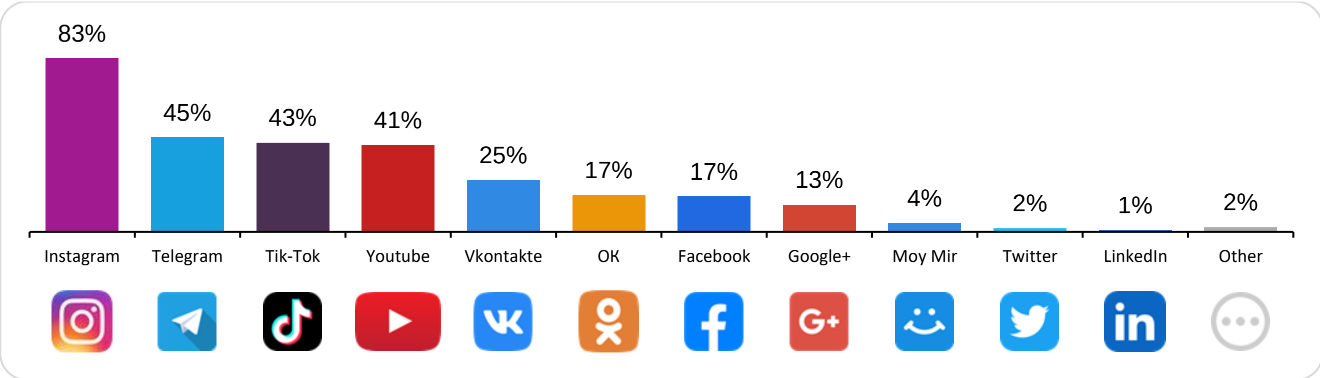


** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Popular Online Communication Services

Social networks. Among social networks, the leading position is held by Instagram, which was mentioned by 83% of respondents. It is followed by social messenger Telegram (45%), video hosting service Tik-Tok (43%) and video hosting YouTube (41%). VKontakte (25%) and Odnoklassniki (17%), as well as Facebook (17%) are significantly less popular. The remaining platforms are practically of no interest to the audience, gaining from 1% to 13% of the options. In general, the data obtained on audience priorities in the use of social networks are consistent with the results of other similar studies on the use of social media in Kazakhstan. [1] [2]

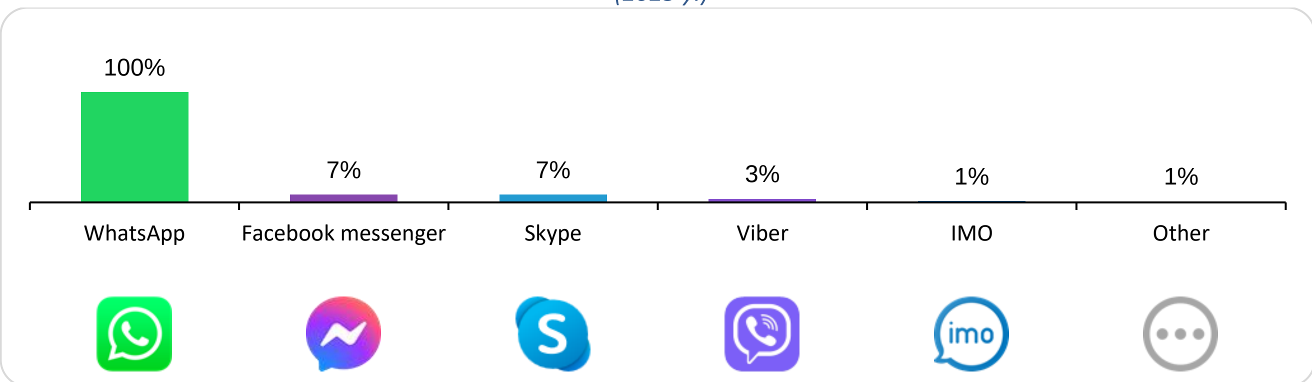
***Diagram 1.5.3.** Use of Different **Social Networks** for Online Communication in the Last Month as From the Date of Survey (2023 y.)*



** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Messengers. Analysis of audience preferences in the choice of messengers for online communication demonstrates the absolute dominance of WhatsApp used by all 100% of respondents. Facebook Messenger and Skype (7%), Viber (3%), IMO (1%) and other apps (1%) follow with a huge gap.

***Diagram 1.5.4.** Use of Different **Messengers** for Online Communication in the Last Month as From the Date of Survey (2023 y.)*

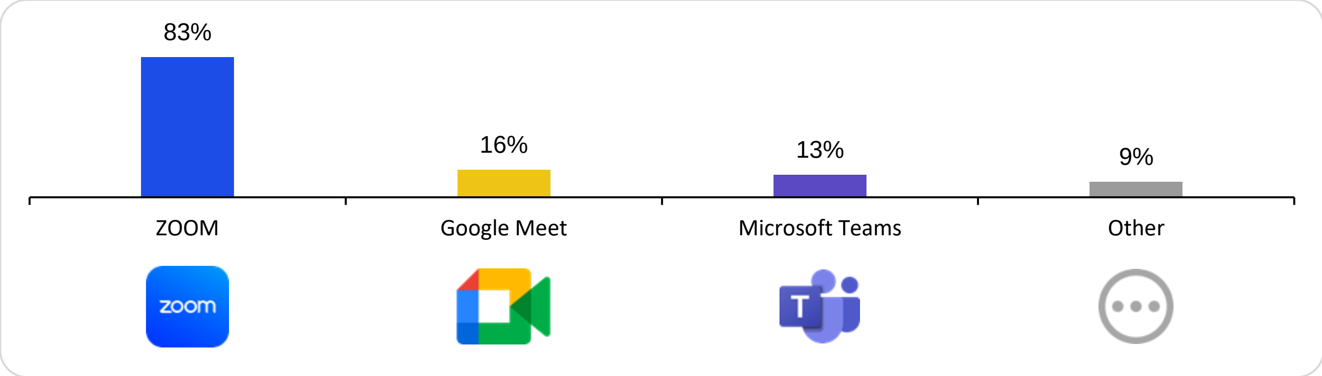


** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Videoconference. ZOOM takes the first place among videoconference services, used by 83% of respondents. Less popular are Google Meet (16%), Microsoft Teams (13%) and other (9%).

[1] "Ranking of social networks in Kazakhstan and what customers expect from them." Profit Kazakhstan, April, 2023
[2] "Social networks 2023: how politicized is Internet sector in Kazakhstan" NIIRK*, March, 2023
*Note: NIIRK – National Research Institute for Communication Development

*Diagram 1.5.5. Use of Different **Videoconference Services** for Online Communication in the Last Month as From the Date of Survey (2023 y.)*



** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Typical User Behaviors in Social Networks

The study of social media behaviors shows that there have been notable changes in Internet communication structure of the population of Kazakhstan over the last years. In particular, the share of those who use social networks to **watch video content** is growing: popularity of watching videos increased from 47% in 2019 to 56% in 2023. However, there has been a decline in the share of users **who read posts**, from 71% in 2019 to 63% in 2023. These trends may occur due to the fact that social networks are actively increasing the video content (for example, Tik-Tok, Instagram Reels, YouTube Shorts), and users prefer more dynamic and visual content with limited attention.

At the same time, interaction activity is declining, namely, the share of **those commenting** has dropped from 32% in 2019 to 20% in 2023. Interest in **searching for information about people** (from 27% to 23%) and **online dating** (from 18% to 14%) has also decreased. However, there has been an increase in the efficiency of using social networks, particularly for **shopping and ordering services**, from 15% in 2019 to 29% in 2023. At the same time, some patterns remain stable: the share of those who **publish photos and videos**, with 33-34% and the share of those who **repost other people – ** 20-22%.

Thus, we can note the trend that social networks are increasingly turning from a platform for communication into a channel for consuming content and practical problem-solving, which indicates a certain transformation of user behavior over the last years.

***Table 1.5.1.** Respondents' Preference in Using Social Networks, N=983*

	2019	2021	2023
Read posts, information	71%	↓ 59%	↑ **63%**
Watch videos	47%	↑ 51%	↑ **56%**
Post photos, audio, video	–	34%	↓ **33%**
Purchases of goods and services	15%	↑ 25%	↑ **29%**
Search for information about people	–	27%	↓ **23%**
Repost other people`s content	–	20%	↑ **22%**
Comment on some information/ content	32%	↓ 24%	↓ **20%**
Dating	18%	↑ 19%	↓ **14%**
Write my day`s news, post	11%	↑ 16%	↓ **10%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

In general, younger generations are the most active users of social networks. However, some activities, such as reading news and watching videos, are popular for respondents from all ages. At the same time, the analysis demonstrates that social networks behavior patterns are changing as people grow older. Thus, the share of people actively posting content and online dating decreases with age, while the use of social networks for more functional purposes, such as shopping and searching for information, increases. Thus, although the overall activity is higher among young people, users in older age groups demonstrate a more pragmatic approach to social networks.

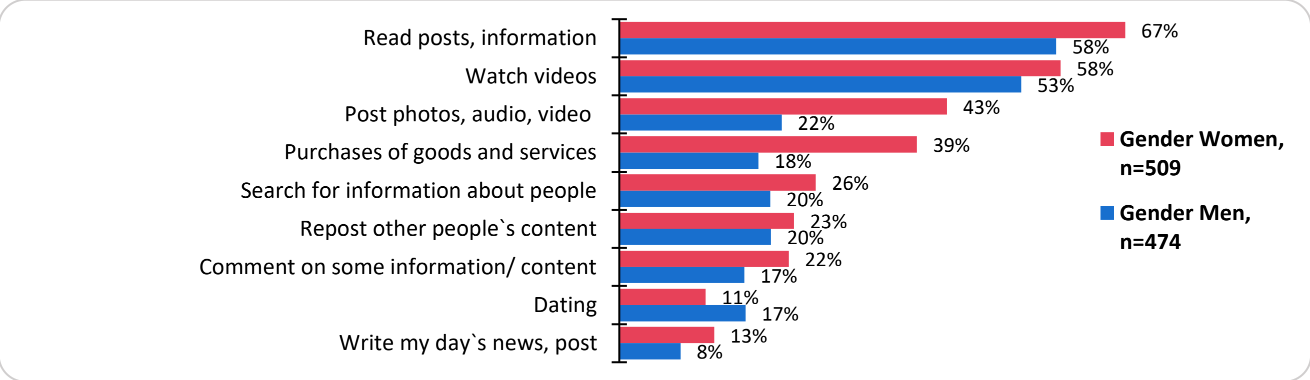
*Table 1.5.2. Respondents' Preference in Using Social Networks by Age **(2023 y.)**, N=983*

	Age				
	14-18, n=125	19-29, n=217	30-45, n=372	46-60, n=217	61-65, n=52
Read posts, information	65%	63%	64%	61%	47%
Watch videos	59%	61%	54%	54%	47%
Post photos, audio, video	43%	47%	31%	22%	8%
Purchases of goods and services	26%	33%	33%	24%	19%
Search for information about people	22%	30%	23%	18%	17%
Repost other people`s content	23%	28%	20%	20%	13%
Comment on some information/ content	21%	21%	21%	18%	9%
Dating	26%	22%	11%	7%	2%
Write my day`s news, post	11%	13%	9%	12%	2%

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Along with age differences, the analysis also reveals significant gender differences in social networks user behavior: in particular, overall engagement and activity on social media is higher among women, they are significantly more likely to read posts (67% vs 58%), post multimedia content (43% vs 22%), make online purchases (39% vs 18%) and search for information about people (26% vs 20%). Men, on the other hand, are more likely to date online (17% vs 11%). Thus, for women, practical use and content consumption are more important, while men appreciate the communicative opportunities of social networks in a greater degree.

*Diagram 1.5.6. Respondents' Preference in Using Social Networks Among Men and Women **(2023 y.)**, N=983*



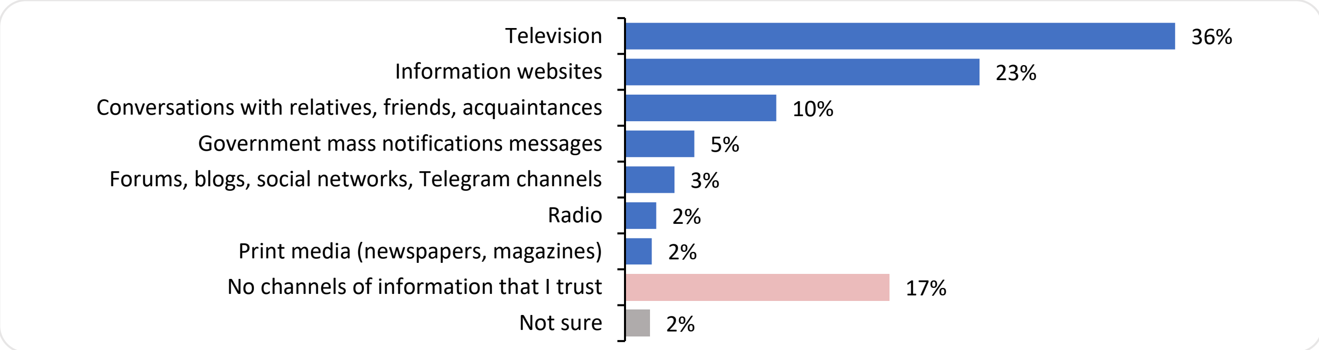
** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

1.6. Mass Media Credibility, Media Objectivity

Information Channels Credibility

The analysis of audience preferences in the choice of information sources for 2023 shows that **television** still enjoys the greatest confidence, it was chosen as a priority channel by 36% of respondents. The second place is occupied by **informational websites** with 23%. Sources such as **interpersonal communication** (10%), **government mass notification messages** (5%), **social networks and online platforms** (3%) are significantly less popular in terms of trust. Traditional media such as **radio and print media** are even less popular, with 2% of votes each. At the same time, a considerable share (17%) of respondents state that they have **no trust** in any information sources at all. Thus, despite audience tendency to move online, television retains its leading position in terms of trust. At the same time, a significant proportion of respondents are skeptical about all channels of information.

Diagram 1.6.1. *Information Channels Credibility Level (**2023 y.**), N=1005*



The analysis of trust in information sources in different age groups reveals its characteristic features. Trust in television consistently grows from the younger to the older age group, from 25% among 14-18-year-olds to 59% among respondents aged 61-65. The opposite situation is observed with Internet media: they are chosen as a priority source by 25% of young people and only 13% of the older age group. Users` trust in Internet platforms (social networks, forums) is maximum in group of 14-18 years old (9%) and decreases to 1-2% among older respondents.

It is interesting to note that the level of complete mistrust in information channels is lowest in the group of 61-65 years old (11%), while this indicator is higher (17-19%) among other age segments. Thus, traditional media, primarily television, are the most authoritative sources of information for the older generation, while the Internet and social media are more popular among younger audiences.

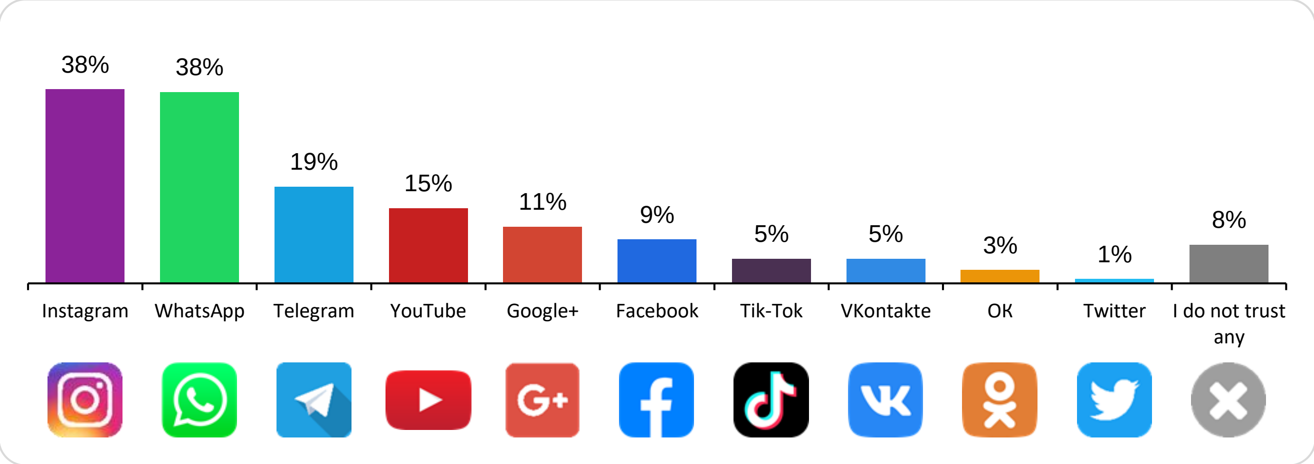
Table 1.6.1. *Information Channels Credibility Level* by Age ***(2023 y.)****, N=1005*

	Age				
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Television	25%	29%	35%	45%	59%
Information websites	25%	28%	25%	18%	13%
Conversations with relatives, friends, acquaintances	16%	8%	10%	10%	6%
Government mass notifications messages	5%	6%	5%	4%	1%
Forums, blogs, social networks, Telegram bots	9%	4%	2%	2%	1%
radio	1%	1%	3%	2%	3%
Print media (newspapers, magazines)	1%	2%	1%	2%	3%
No channels of information that I trust	17%	18%	19%	16%	11%
Not sure	2%	3%	1%	1%	1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Social Media Credibility of Respondents

Analyzing the survey results of respondents' trust in various social networks and messengers, we can see a trend towards popularization of **Instagram** and **WhatsApp** as the two main leaders in this market, each of these services is trusted by the same number of respondents - 38% each. They are followed by **Telegram** with 19% and **YouTube** with 15%. Other social networks and messengers received less than 10% of respondents' votes. At the same time, 8% of respondents said that they do not trust any of the social networks. Thus, the audience favorites - Instagram and WhatsApp - enjoy roughly equal trust, while the other services are significantly behind them or have a low level of credibility.

***Diagram 1.6.2.** Social Media Credibility of Respondents **(2023 y.)**, N=1005*



** Amount is not equal to 100 percent as respondents could mark up to 3 answer options.*

User credibility level in certain social networks and messengers depends on the age and gender of respondents:

- For example, Instagram is most popular among younger respondents aged 14-29 year olds (40-50%), while trust in this network is much lower in older groups (13% in the group aged 61-65). At the same time, this network is much more trusted by women (47%) than men (29%).
- WhatsApp is also more trusted by the female audience (41%) than the male audience (34%). At the same time, WhatsApp shows a relatively stable level of trust in all age categories, ranging from 33% to 41%.
- As for Telegram, one can see here differences with regard to the age, credibility level drops from 30% at 14-18 years to 13-14% at 46-65 years.

***Table 1.6.2.** Social Media Credibility of Respondents by Age and Gender (**2023 y.)**, N=1005*

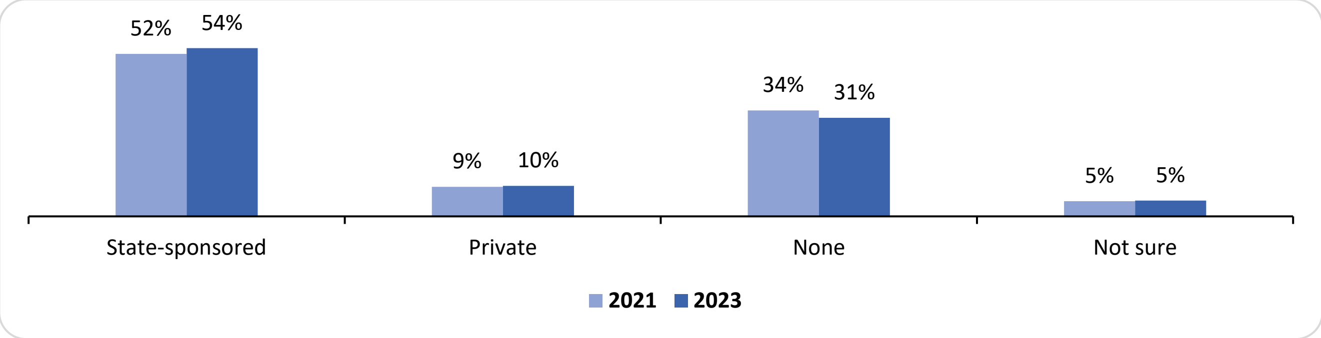
	Gender		Age				
	Male, n=489	Female, n=516	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Instagram	29%	47%	40%	50%	39%	30%	13%
WhatsApp	34%	41%	41%	33%	38%	39%	38%
Telegram	19%	19%	30%	25%	16%	13%	14%
YouTube	17%	13%	19%	11%	13%	18%	16%
Google+	11%	11%	21%	12%	9%	9%	7%
Facebook	8%	9%	3%	7%	11%	8%	12%
Tik-Tok	6%	4%	4%	5%	4%	5%	6%
VKontakte	6%	4%	6%	8%	4%	4%	2%
Odnoklassniki	3%	2%	1%	0%	2%	4%	11%
Twitter	1%	1%	1%	1%	1%	1%	0%
No social media that I trust	*9%*	*6%*	*5%*	*7%*	*8%*	*9%*	*8%*

** Amount is not equal to 100 percent as respondents could mark up to 3 answer options.*

Credibility to Different Types of Information Sources

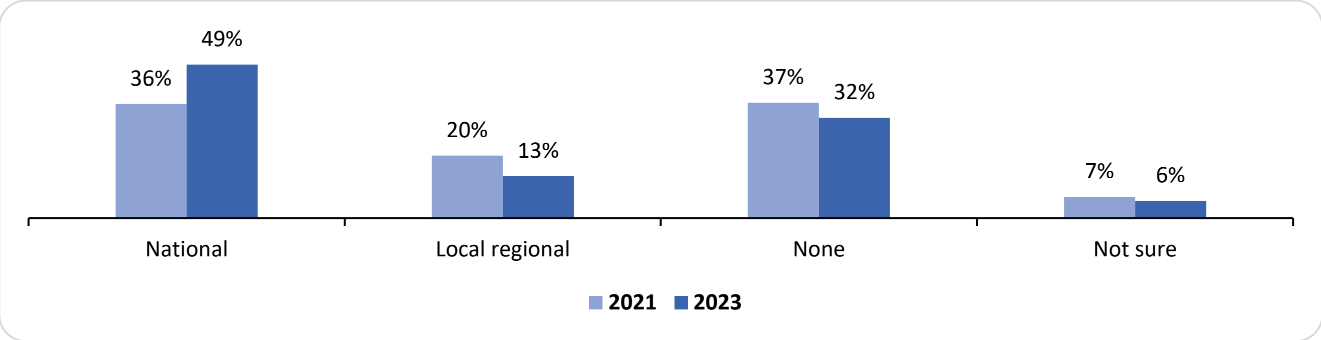
Credibility to state-sponsored/private media. Throughout 2021 and 2023, state media remain the most trusted sources of information for respondents, and in 2023 there is even a slight increase of credibility to state media (from 52% to 54%), which indicates that their position as the most reliable sources in the audience's perception is strengthening. At the same time, credibility to private media remains extremely low, amounting to 9-10% in both periods. Of note, almost a third of respondents (31% in 2023 and 34% in 2021) indicated complete mistrust in both state-sponsored and private media.

Diagram 1.6.3. *Credibility to State-Sponsored/Private Media*



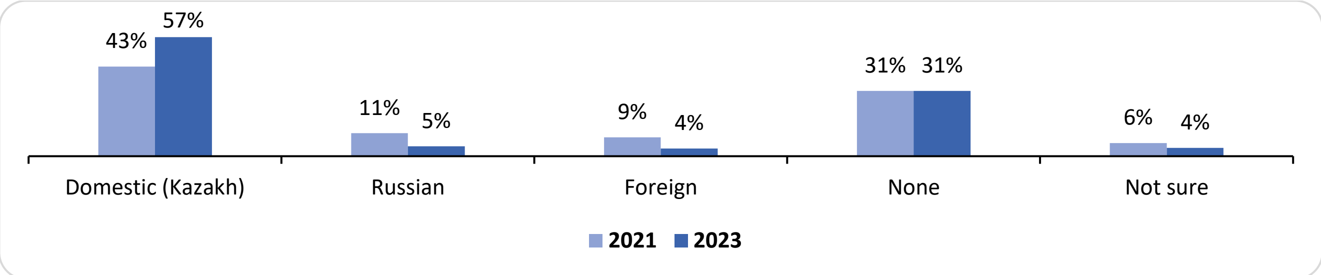
Credibility to national/local regional media. Evaluation of credibility to national and local regional media in the dynamics of 2023 and 2021 shows a tendency towards strengthening the position of national/republican media as opposed to decline of authority relating to local regional sources of information; in 2023, the share of respondents trusting the national media increased to 49% compared to 36% in 2021. At the same time, there is a decline in credibility to local regional media from 20% to 13%. In the meantime, there is still a high level of general distrust in both types of media, in particular, almost a third of respondents say that they do not trust either the national or regional media.

Diagram 1.6.4. *Credibility to National/Local Regional Media*



Credibility to domestic/foreign media. Next, let us consider the user credibility level to domestic, Russian and foreign media. As the data show, there is an increase in the priority of Kazakh media following the decreasing interest in Russian and foreign sources of information. In particular, in 2023 the share of respondents trusting domestic media increased to 57% compared to 43% in 2021. At the same time, there is a significant decrease of trust in Russian media (from 11% to 5%) and foreign media (from 9% to 4%). Alongside with that, there is still a high level of media distrust in general, where almost a third of respondents expressed complete distrust, not favoring either domestic or foreign media.

Diagram 1.6.5. *Credibility to Domestic/Foreign Media*

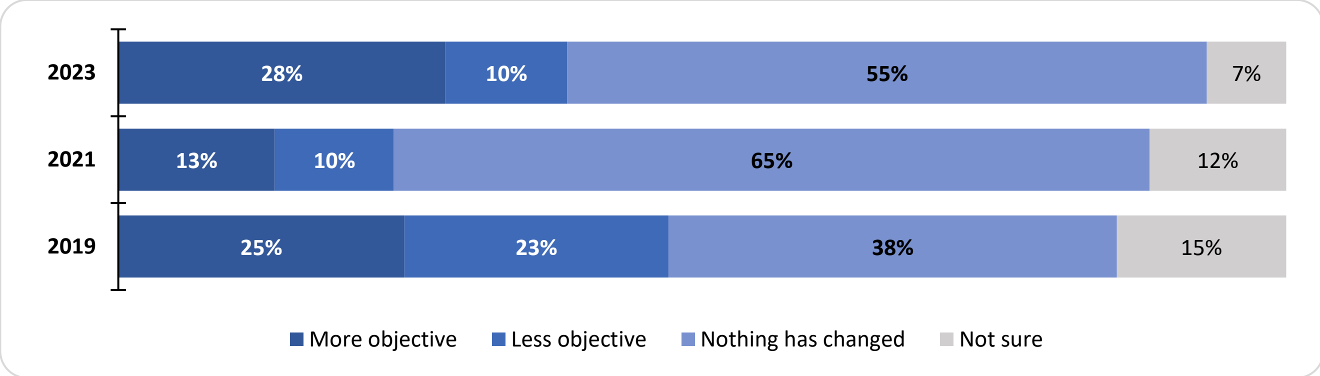


As can be seen from the above, in the dynamics of 2023 and 2021, there is a tendency to increase the audience's trust in the state-sponsored and national Kazakh media, with a simultaneous decrease in interest for private, foreign and regional media. State-sponsored and national media strengthen their positions as the most authoritative sources of information. At the same time, credibility to private, regional, Russian and international media remains at a low level or even decreases. In these circumstances, general distrust level of the audience towards the media types represented in the study remains stably high.

Objectivity in Information Coverage: Respondents' Assessment

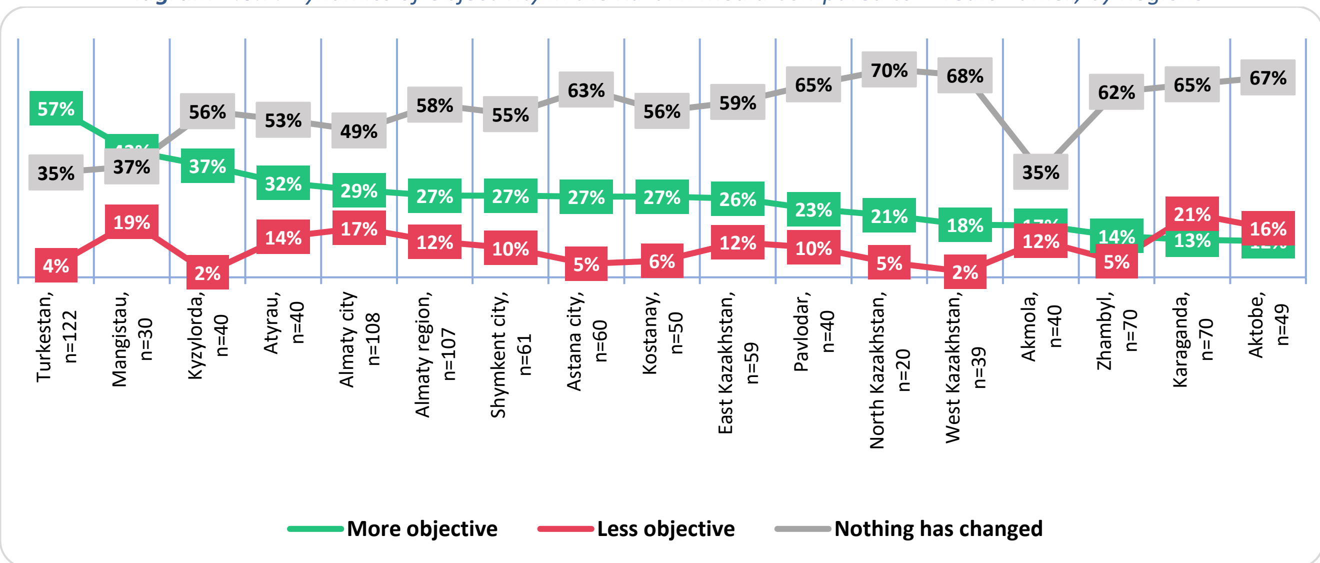
With regard to objectivity of coverage of events, over the past 2 years there has been a positive trend in the audience's assessments of work performance of Kazakhstani media: if in 2021 only 13% of respondents believed that the media have become more objective, then in 2023 their share increased to 28%. The share of respondents who do not see any changes in objectivity of news coverage decreased significantly, from 65% to 55%. Only 10% of respondents believed that objectivity of events coverage in the Kazakhstani media has decreased. Nevertheless, despite the positive dynamics, still more than half of the respondents do not see any improvement in work of the media.

Diagram 1.6.6. *Dynamics of Objectivity in the Kazakh Media Compared to 2 Years Earlier*



The survey results by regions of Kazakhstan demonstrate significant differences in assessing the dynamics of objectivity of local media. Thus, the most positive shifts relating to quality of media work are noted in Turkestan region, where 57% of respondents noted an improvement in the situation. At the same time, in Karaganda region only 13% of respondents noted an increase in objectivity, while 21% assessed the situation as worsening. The share of skeptical audience in West-Kazakhstan, North-Kazakhstan and Pavlodar regions is extremely high, where almost 70% of respondents here do not see any positive dynamics for the last 2 years. As a result, public opinion about objectivity level development of local media varies significantly in different regions of the country.

Diagram 1.6.7. *Dynamics of Objectivity in the Kazakh Media Compared to 2 Years Earlier, by Regions*



1.7. Media Information Literacy. Critical Skills and Understanding of Online Safety Risks

Respondent Skills When Dealing with Information

The results of 2023 survey show a slight decrease in respondent skills level when working with information compared to previous years. In particular, the number of those who can collect and analyze data from various sources to obtain a true picture of the topic of interest has noticeably decreased, from 57% in 2021 to 43% in 2023. Share of respondents who can state requests correctly to find relevant information on the Internet has also decreased from 49% in 2021 to 45% in 2023.

In terms of skills for analyzing and evaluating information, the share of those who can distinguish objective information from subjective assessments and opinions has also declined in recent years, from 32% in 2021 to 27% in 2023. Most of the skills in this category, such as assessing the reliability of information on the Internet (30% in 2023), recognizing hidden information about additional payments (17% in 2023), and determining if a TV program is "made for kids" (27% in 2023), remain stable and their levels change by no more than 1-3 percentage points from 2021. However, in general, these indicators show that these skills are underdeveloped among a significant part of the audience.

In general, the 2023 results show a trend towards a slight but steady decline in information skills of the population of Kazakhstan, affecting both basic and more complex analytical competencies. The decline in skills is also confirmed by an increase in the share of respondents who do not possess any of the above mentioned competencies, from 13% to 18% over the past two years. However, compared to 2019, there is a general progress among the citizens in learning various information skills. Nevertheless, the challenge of information literacy and analytical competence remains relevant and requires certain efforts at various levels of education and public attention.

Since the skill of **collecting and analyzing data from different sources** represents a key component of media literacy, let us take a closer look at reasons and factors that led to a decline in this skill in 2023 compared to the 2021 figures, from 57% to 43%.

To analyze possible reasons for decrease in the share of respondents able to collect and analyze data from different sources, we will compare this category of respondents with different variables such as main sources of information, media consumption, other components of media literacy, etc. Further, we will compare the results of the data for 2023 and 2021. This approach will provide an opportunity to analyze the available data comprehensively and identify factors that influence respondents' ability to gather and analyze information from different sources. Comparisons with responses to other questions in the questionnaire will allow us to find cause-and-effect relation and understand the reasons for the observed changes. In addition, a comparative analysis of the data for 2023 and 2021 will identify the most important patterns and trends in these relationships.

So, the results of the analysis show that in 2023 the below described dynamics can be seen **among respondents who are able to gather information from different sources**:

- Significant decrease in the share of those who obtain information from TV programs (from 51% to 29%) and print media (from 12% to 4%) compared to 2021. At the same time, the share of social networks as a source of information increased in this category - from 43% to 65%. This may indicate a decline in interest in diverse sources of information and an increasing tendency to acquire information through social networks, which often contains less verified information;
- Sharp decline in the share of Kazakh-language content consumers (from 31% to 14%). This may indicate that Kazakh-speaking respondents who collect information from different sources lack the variety and prevalence of available content in the Kazakh language;
- Significant increase in the share of those who do NOT consume news and analytical programs (from 1% in 2021 to 15% in 2023), which may indicate a decline in the ability to compare data from different sources;
- Trust in traditional media, both state-sponsored (from 71% in 2021 to 55% in 2023) and national (from 61% in 2021 to 50% in 2023), is noticeably decreasing. Also among this category of respondents, the share of those who do not trust mass media/media at all increased markedly - from 20% in 2021 to 30% in 2023. This can probably lead to a greater distrust in information in general and a reduced motivation to gather information from different sources;

- Share of those who, when dealing with contradictory information in the media, compare it with information from other sources is decreasing - from 34% in 2021 to 28% in 2023. At the same time, the number of those who “do not undertake any actions” when faced with contradictory information is growing significantly in this category - from 20% to 39%. This indicates a decrease in critical and analytical attitudes towards information;
- There is a growing feeling of being deceived when consuming information from different media channels, given deliberately false, unverified information or trying to impose a certain point of view, with 18% in 2021 and 30% in 2023. Increased perceptions of deception and manipulation in the media can lead to cynical attitude towards information and reduced motivation to search for reliable data;
- Decline in share of those who usually know where and from what kind of source to find the information they need (from 88% in 2021 to 85% in 2023). This indicates that as new sources and content formats become available, it becomes more difficult to find the information they need quickly and accurately;
- Decline in share of those who believe that the more different sources of information the better (from 86% in 2021 to 80% in 2023), which may indicate the information oversaturation. People may begin choosing the content quality over quantity, which may reduce their motivation to actively seek information from different sources;
- Increase in the proportion of those who often experience fatigue from large amounts of information (from 47% in 2021 to 50% in 2023). This fatigue may reduce motivation to engage in deep analysis of information from different sources;
- Among respondents with higher education, there is a significant decrease in the share of those who collect information from different sources, with 61% in 2021 to 51% in 2023.

Thus, percentage decrease of respondents who have the skills to collect and analyze data from various sources is probably linked to the decreasing interest in diverse sources of information and increasing concentration on social networks, decreasing ability to compare data from different sources, increasing distrust in mass media/media, growing dissatisfaction with the quality of information provided, increased perception of manipulation and deception in media content, and increasing feeling of fatigue from information overload.

***Table 1.7.1.** Respondents' Skills in Dealing With Information*

	2019, N=1000	2021 N=1146	2023, N=1005
Formulate search queries to find relevant information on the Internet	41%	↑ 49%	↓ **45%**
Gather information from different sources to get a full picture on the topic of interest to me	30%	↑ 57%	↓ **43%**
Determine whether the information found on the Internet is correct and credible	17%	↑ 31%	= **30%**
Can understand that a certain TV program is suitable for children and adolescents	8%	↑ 30%	↓ **27%**
Identify the differences between information and other messages, including but not limited to opinions, judgements, critics	18%	↑ 32%	↓ **27%**
Distinguish a bot/troll from a real discussant	–	↑ 27%	↓ **24%**
Identify hidden information about additional payments for services	5%	↑ 18%	= **17%**
None of the above	19%	↓ 13%	↑ **18%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Analysis of the survey data by age groups reveals a number of regularities in distribution of competencies when working with information. Firstly, young respondents aged 14-29 are the most media-literate; these groups have the highest scores for most of the skills studied. Secondly, in the older category of 61-65 years old, the overwhelming number of skills is very poorly developed, i.e. the share of those who possess them usually does not exceed 25%. Thirdly, the ability to recognize Internet bots and trolls shows a particularly sharp decline from older to younger age groups, from 32-34% among 14-29-year-olds to 10-15% in the 46-65 age group. Finally, one of the largest gaps between ages can be seen in the proportion of those with a complete lack of skills when dealing with information, from 7% among 19-29 year olds to 42% among respondents aged 61-65.

Table 1.7.2. Respondents' Skills in Dealing With Information Among Different Age Categories (2023 y.)

	Age					Gender	
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63	Men, n=489	Women, n=516
Formulate search queries to find relevant information on the Internet	51%	55%	45%	40%	20%	41%	49%
Gather information from different sources to get a full picture on the topic of interest to me	48%	53%	44%	38%	17%	39%	47%
Determine whether the information found on the Internet is correct and credible	38%	33%	29%	26%	20%	27%	32%
Can understand that a certain TV program is suitable for children and adolescents	24%	33%	28%	25%	15%	24%	30%
Identify the differences between information and other messages, including but not limited to opinions, judgements, critics	23%	31%	29%	25%	9%	23%	29%
Distinguish a bot/troll from a real discussant	32%	34%	23%	15%	10%	26%	22%
Identify hidden information about additional payments for services	17%	21%	17%	14%	3%	18%	15%
None of the above	11%	7%	19%	23%	42%	21%	15%

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Analysis of data by gender shows that skills level with regard to information handling is higher among women than among men. In particular, among women the share of those who can correctly formulate searches queries is higher (49% vs. 41% of men). Women also more often note the ability to collect and analyze information from a variety of sources to obtain an objective picture of the topic of interest (47% vs. 39% of men). Women also score higher in assessing the reliability of information found on the Internet (32% vs. 27% of men). However, it is worth noting that men have a slightly higher score for one of the skills, namely, the ability to recognize bots and trolls in online discussions (26% vs. 22% of women). At the same time, significantly more men (21%) than women (15%) note that they do not possess any of the above-mentioned skills of working with information, which also confirms the trend towards greater media literacy among female audience.

Assessment of Media Literacy and Information Culture Level

Analysis of the 2023 survey data shows a fairly high level of media literacy in terms of a number of basic information evaluation skills. Thus, the majority of respondents express the opinion that media should be responsible for the quality of information provided (84%). There are also high indicators relating to ability to find relevant information in various sources (77%) and understanding of possible contradictory information from different sources (79%).

According to some judgments reflecting ethical and critical aspects of media consumption, the results are slightly lower. In particular, 64% of respondents note that they regularly compare data from different sources, 62% of respondents note their ability to identify advertising in the media content, and the share of those who understand the importance of links when using other people's content in social networks is 58%.

Analyzing the last three indicators in the table of results, namely, trusting information in media by default (37%), asking for help from acquaintances in searching for information (37%) and negative experience with inaccurate information in the media (27%), it is important to take into account that here the lower indicators may indicate a relatively high level of media literacy of the audience. Thus, generally, there is a fairly high level of understanding of the key principles of media and information space, as well as basic skills of searching for information and its critical evaluation. However, there is also certain potential for further development of media literacy; ethical and critical aspects of interaction with information have not yet been fully mastered by a part of the audience.

Table 1.7.3. Assessment of Media Literacy and Information Culture Level

	Percentage of those who agree		
	2019	2021	2023
Media should be responsible for poor quality information just as the producer is responsible for poor quality products/services	69%	↑ 92%	↓ **84%**
Information reports from different sources often contradict each other	43%	↑ 80%	↓ **79%**

Usually I know where (in what source) I can find the relevant information	67%	↑ 82%	↓ **77%**
Different media often repeat the same information, little different from each other	56%	↑ 86%	↓ **76%**
I think the more different sources of information, the better	58%	↑ 81%	↓ **76%**
The media should report only the facts, and what these facts mean, everyone will decide for his/her own	66%	↑ 81%	↓ **75%**
I can easily and quickly find any information I need	73%	↑ 86%	↓ **74%**
Having received a friend request in the social network from a stranger, I first check the profile, and then make a decision	–	82%	↓ **74%**
I know how to arrange my social media feed to read only information that interests me	–	75%	↓ **70%**
There are media (TV channels, newspapers, magazines, radio stations, etc.) that I trust and those I do not trust	52%	↑ 67%	↓ **64%**
I often compare information from different sources to verify it	44%	↑ 71%	↓ **64%**
I can easily determine what information contains advertising	46%	↑ 72%	↓ **62%**
When posting other people's content (information, pictures, videos, etc.) on social media it is necessary to give a link to the source	–	71%	↓ **58%**
I often experience fatigue from a loads of information	33%	↑ 58%	↓ **49%**
To assess the information from newspapers, magazines, TV, radio, etc., I try to find out whose interests this media represents, who is behind it	32%	↑ 48%	↓ **42%**
I'm used to believing what the newspapers say, what they say on TV and radio	45%	= 45%	↓ **37%**
I often ask relatives or acquaintances to find the information I need	29%	↑ 41%	↓ **37%**
There have been instances where I have lost time or money due to incorrect information in the media	23%	↑ 32%	↓ **27%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

In the dynamics of recent years. Analysis of the dynamics of respondents' answers in recent years shows a certain decrease in a number of media literacy indicators in 2023 compared to 2021. In particular, the share of respondents who believe that the media should be responsible for the quality of information has significantly decreased (from 92% to 84%), as well as those who note the repetitiveness of information in different media (from 86% to 76%). Assessments of such skills as the ability to quickly find relevant information (from 86% to 74%), checking profiles of strangers in social networks before adding them to friends (from 82% to 74%), comparing data from different sources (from 71% to 64%), determining the advertising nature of content (from 72% to 62%), and understanding the importance of links when reposting in social networks (from 71% to 58%) decreased. However, at the same time, the share of those who automatically trust information in the media (from 45% to 37%), often turn to acquaintances for help in finding information (from 41% to 37%), and have faced negative consequences due to unreliability in the media (from 32% to 27%) also decreased. This may reflect a certain progress in the development of critical thinking of some part of the audience.

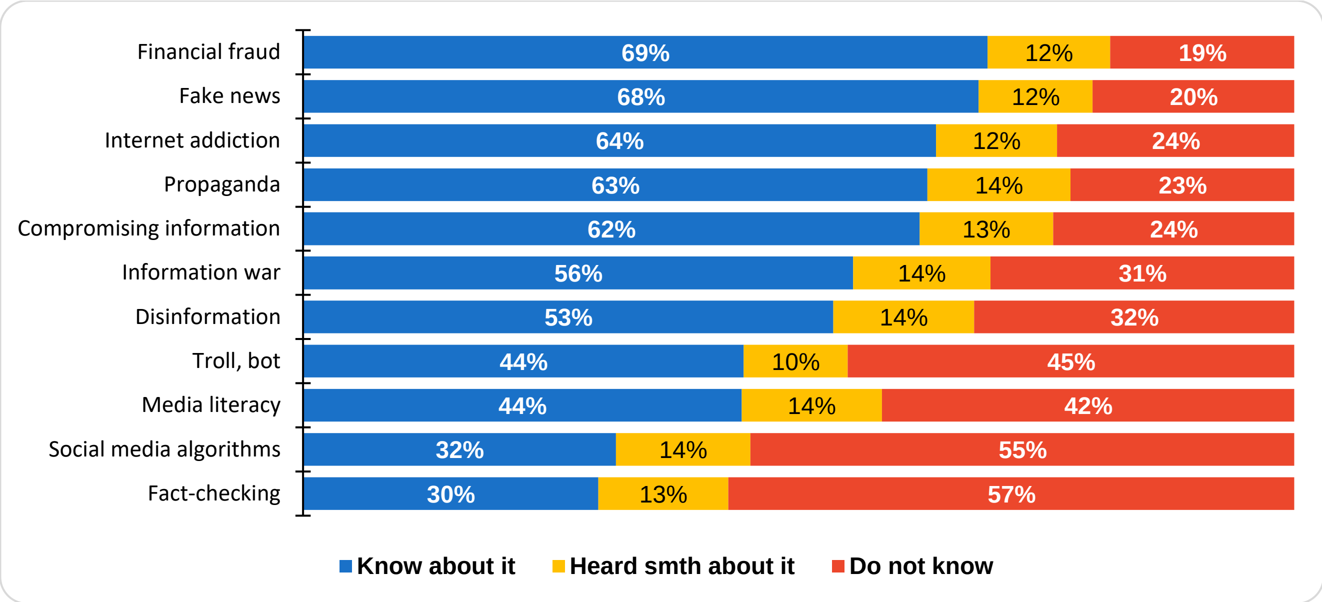
Conclusion. Summarizing the analysis of media literacy and information culture level, we can summarize that Kazakhstan has a fairly high overall level of media literacy among the population; majority of the audience demonstrates an understanding of the key principles of media functioning and possesses basic skills in searching for information and critical evaluation. However, in recent years, there has been a trend towards a decline in the indicators for certain components of media literacy compared to the level of 2021.

Respondents' Knowledge of Information Concepts

The level of public awareness of information literacy issues is still insufficient, what can be confirmed by the results of the conducted survey; despite the fact that the majority of respondents are familiar to a greater or lesser extent with the proposed concepts, there are significant differences in the level of awareness of some certain terms. For example, the most recognizable terms in the field of information literacy are financial fraud and fake news, where about 70% of respondents said they knew these concepts. Understanding of such terms as network addiction, propaganda and compromising information is demonstrated by about 60% of respondents. Far fewer respondents are familiar with the concepts of social network algorithms and fact-checking, only about one third of the survey participants.

Thus, concepts related to fraud and fakes are most recognized in the media space, while concepts related to information verification and the functioning of social networks are less familiar to the audience.

***Diagram 1.7.1.** Knowledge of Media Literacy Concepts **(2023 y.)**, N=1005*

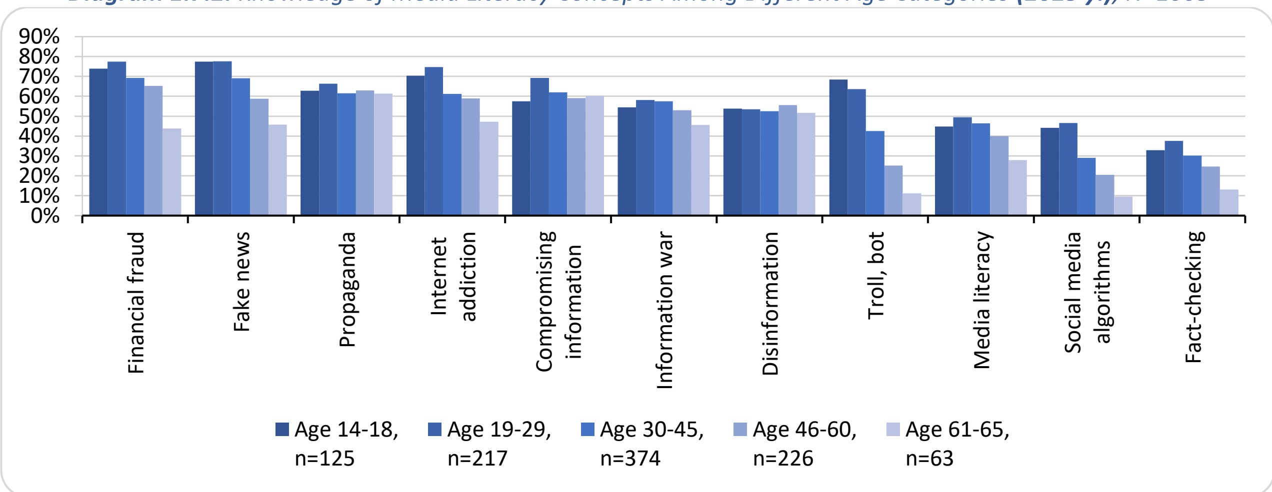


** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Knowledge of informational concepts has its own peculiarities depending on the age:

- In general, the younger generation (14-29) has a higher awareness on digital environment terms.
- The concepts of "propaganda", "compromising information" and "disinformation" have similar levels of awareness in all age groups, maintaining a stable level from 52% to 69%. This can be explained by the fact that these terms are more traditional and widespread.
- As for older generation, awareness of such concepts as "troll", "bot", "social media algorithms" and "fact-checking" in the age group of 61-65 years is much lower than among young people. Compared to the older generation, the high awareness of these concepts among the younger generation may be due to their more active interaction with the Internet environment.

***Diagram 1.7.2.** Knowledge of Media Literacy Concepts Among Different Age Categories **(2023 y.)**, N=1005*



** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

In the dynamics of recent years. Comparing the results of 2023 and 2021 surveys, one can observe a general decline in public awareness of key information literacy concepts. During that period, there has been a significant decline in knowledge of trending terms such as disinformation (from 68 per cent to 53 per cent), compromising information (from 75 per cent to 62 per cent), as well as "Internet addiction" (from 75 per cent to 64 per cent) and "propaganda" (from 73 per cent to 63 per cent). There is also a decreasing tendency with respect to understanding a number of other concepts.

Thus, between 2021 and 2023, one can see a decline in awareness of basic information literacy concepts. However, despite the distinct decline compared to 2021, current level of awareness in most of the concepts analyzed remains higher than in 2019. This shows a long-term positive trend in the acquisition of knowledge about key concepts in the information sector.

Table 1.7.4. *Knowledge of Media Literacy Concepts*

	2019	2021	2023
Financial fraud	–	–	**69%**
Fake news	37%	↑ 72%	↓ **68%**
Internet addiction	56%	↑ 75%	↓ **64%**
Propaganda	65%	↑ 73%	↓ **63%**
Compromising information	61%	↑ 75%	↓ **62%**
Information war	43%	↑ 63%	↓ **56%**
Disinformation	–	68%	↓ **53%**
Troll, bot	–	50%	↓ **44%**
Media literacy	–	47%	↓ **44%**
Social media algorithms	–	35%	↓ **32%**
Fact-checking	–	36%	↓ **30%**

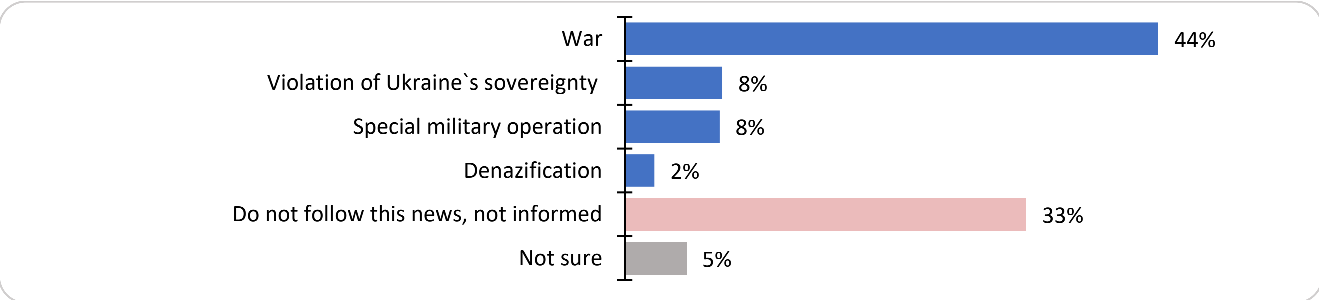
** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Perception of Events in Ukraine

In order to assess the critical attitude of the audience towards the information received, respondents were asked to give their own interpretation of current events in Ukraine. Purpose of the question is to determine the extent to which the position of the population correlates with the official Russian line of arguments regarding the situation in Ukraine.

According to the survey results, the majority of respondents consider the events taking place in Ukraine as military actions - 44%. At the same time, a significant proportion of the audience (33%) declared that they were unaware of the situation in Ukraine, which indicates that some part of the population is passive about the news agenda. Far fewer people share the official Russian position, considering the circumstances as special military operation or measures aimed at denazification, with 8% and 2% respectively.

Diagram 1.7.3. *Perception of Current Events in Ukraine* ***(2023 y.)****, N=1005*



Despite the fact that respondents from all ages have a prevailing opinion about military actions in Ukraine (41-49%), the analysis of the data by age shows some peculiarities of views of different generations.

- The lowest proportion (22%) is among respondents aged 61-65, those who did not follow and were not informed about events in Ukraine. In all other age groups, the rate is higher, ranging from 32 % to 36 %. This can be explained by the older generation's greater interest in Russian TV broadcasts, where the topic of Ukraine occupies a significant place in the discussions.
- A significant proportion (18 %) of respondents aged 61-65 believe that Ukraine's sovereignty is being violated. In the remaining age groups, only 9 per cent share this point of view. This is probably due to the fact that the older generation, who came through the period when Kazakhstan was part of the USSR and then gained independence, has a deeper understanding and appreciation of such concepts as sovereignty and independence of the state. Their personal experience gave them a broad understanding of their importance to Kazakhstan.

Thus, despite some differences, there is generally a critical perception of incoming information. In these circumstances, senior respondents demonstrate greater engagement and awareness of the situation.

Table 1.7.5. *Perception of Current Events in Ukraine by Age Groups* ***(2023 y.)****, N=1005*

	Age					Nationality	
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63	Russian, n=212	Kazakh, n=705
War	49%	43%	44%	41%	45%	31%	50%
Violation of Ukraine`s sovereignty	9%	6%	7%	8%	18%	3%	10%
Special military operation	4%	10%	7%	10%	9%	15%	5%
Denazification	0%	3%	2%	5%	3%	4%	1%
Do not follow this news, not informed	36%	36%	33%	32%	22%	41%	29%
Not sure	2%	4%	8%	4%	3%	5%	5%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Survey analysis relating to perception of events in Ukraine in terms of the nationality of respondents also shows that there are certain differences between representatives of the Russian and Kazakh communities of Kazakhstan. Thus, among ethnic Kazakhs, the opinion that there is a war going on in Ukraine is absolutely dominated, 50% of respondents say so. However, the proportion among Russians is much lower, 31 per cent. At the same time, among Russians, the percentage of those who share the official Russian position on the special operation (15%) and denazification (4%) is slightly higher, compared to 5% and 1% among Kazakhs, respectively. In addition, 41% of Russian respondents said they were unaware of the situation in Ukraine, which is much higher than among Kazakhs - 29%.

For the sake of completeness, let us consider the data on Russian media consumption by ethnicity to see how this correlates with opinions of the Russian and Kazakh communities regarding the situation in Ukraine.

Thus, it can be seen that the Russian population of Kazakhstan shows a higher level of involvement in consumption of Russian TV channels than Kazakhs. This difference is especially evident in the case of key federal TV channels *Russia 1* (Kazakhs 10%, Russians 20%) and *Russia 24* (Kazakhs 9%, Russians 13%) which broadcast the official position of the Russian authorities, including reports and comments by officials with regard to the "special military operation".

Table 1.7.5.1. *Most* ***Popular Russian TV Channels*** *Watched by Respondents in the Last Week by Ethnicity* ***(2023 y.)****, N=718*

What Russian TV channels have you watched in the last week?	Ethnicity	
	Kazakh, n=555	Russian, n=163
NTV	17%	23%
TNT	16%	31%
Russia 1	10%	20%
TV-3	2%	4%
Match TV	2%	1%
Channel One	10%	7%
Russia 24	9%	13%
STS	6%	21%
Zvezda	3%	4%
Pyatnitsa	2%	4%
Other	6%	18%
Did not watch Russian TV	47%	29%
Not sure	3%	2%

** To more precisely reflect the real picture of TV viewing, respondents were not shown a list of options; the first 3 named channels from the respondent were recorded. Amount is not equal to 100%.*

One can also see significant differences in consumption of Russian news and analytical materials between Kazakh and Russian audiences in Kazakhstan. For example, only 5% of the **Kazakh respondents** regularly listen to such content on the Russian radio, 3% read in print media, 8% read online and the same percentage watch on TV. At the same time, these figures are significantly higher among the **Russians respondents**: 19% listen to Russian news and analytics on the radio, 15% read in the press, 25% read online and 27% watch on television. Therefore, the Russian population of Kazakhstan demonstrates a higher level of involvement in the Russian media consumption. This applies to all major channels of information distribution, namely: print media, radio, television and online resources.

*Table 1.7.5.2. Media Consumption of Russian News and Analytical Programs by Ethnicity **(2023 y.)***

News and analytical programs of which countries do you usually prefer?	Ethnicity	
Russian news and analytical programs **on the radio,** *n=44*	Kazakh, n=357	Russian, n=102
	5%	19%
Russian news and analytical programs **in newspapers/magazines,** *n=44*	Kazakh, n=432	Russian, n=122
	3%	15%
Russian news and analytical programs **on web sites,** *n=112*	Kazakh, n=641	Russian, n=200
	8%	25%
Russian news and analytical programs **on TV,** *n=102*	Kazakh, n=555	Russian, n=163
	8%	27%

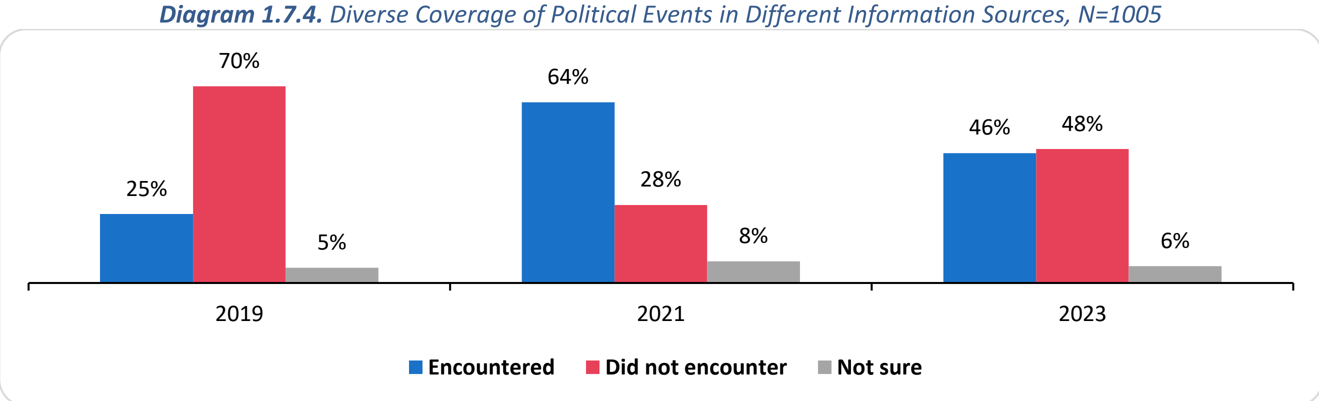
Therefore, data analysis shows that the Russian population of Kazakhstan has a higher level of consumption of Russian media than the Kazakhs. This trend indirectly explains the higher proportion of supporters of the official Russian position on Ukraine among Russian respondents, as they are more exposed to the influence of Russian media. At the same time, it cannot be excluded that an increased interest of the Russians in Russian media is due, among other things, to the language factor and desire to receive information in their mother tongue. On the other hand, there is a more critical perception among the Kazakh population, greater involvement and less exposure to the Russian agenda. It is worth noting that this diversity of views in multinational Kazakhstan is natural and emphasizes that each nationality makes its own unique contribution to the shaping of public opinion.

Different Coverage of One and The Same Political Event

The issue of objectivity and differences in the coverage of the same political events in the Kazakh media continues to worry a significant part of the audience; however, over the last years the situation has shown the uptrend. According to the survey 2023, 46% of respondents said they came across the situation where the same political event was covered differently in the media. At the same time, almost the same percent of respondents (48%) did not observe this.

Compared to 2021, there was a marked decrease in the proportion of those who faced different coverage of political events in the media, from 64% to 46%. At the same time, share of those who did not face it has increased from 28% to 48%. In general, if we look at the dynamics since 2019, when only 25% of respondents noted differences in political news presentation, then in 2021 this share sharply increased to 64%. By 2023, however, the situation has returned to normal and the proportion of those faced herewith has dropped to 46 %. These data may reflect both positive changes and a greater diversity of viewpoints in the media. On the one hand, a decrease in the proportion of respondents who experience differences in news coverage may mean a more objective coverage of political events. On the other hand, a greater diversity of views should not necessarily be regarded as "positive changes", since the mere fact of alternative views existence is important.

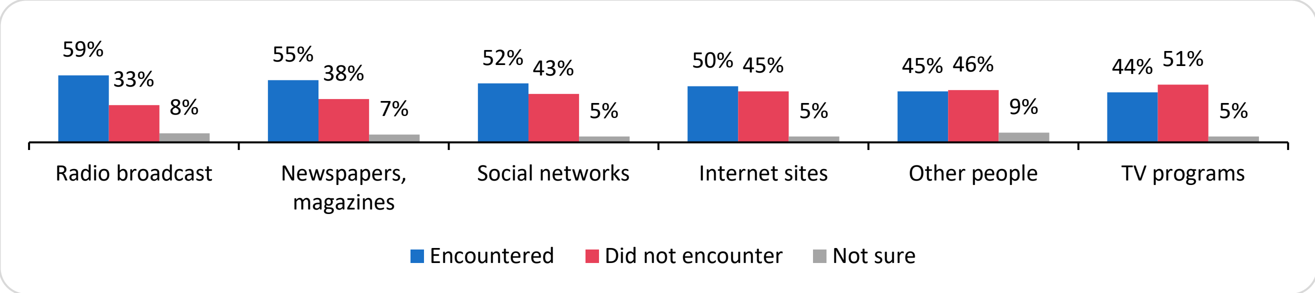
***Diagram 1.7.4.** Diverse Coverage of Political Events in Different Information Sources, N=1005*



Examples of diverse media coverage of the same political events affect the audience of all major sources of information, but are manifested differently. The largest share of respondents faced with similar situation is among those who receive most of the news from radio broadcasts (59%) and print media (55%). Users of social networks and web sites show slightly lower shares, with 52% and 50%, respectively. Those who learn information from other people (45%) and from TV programs

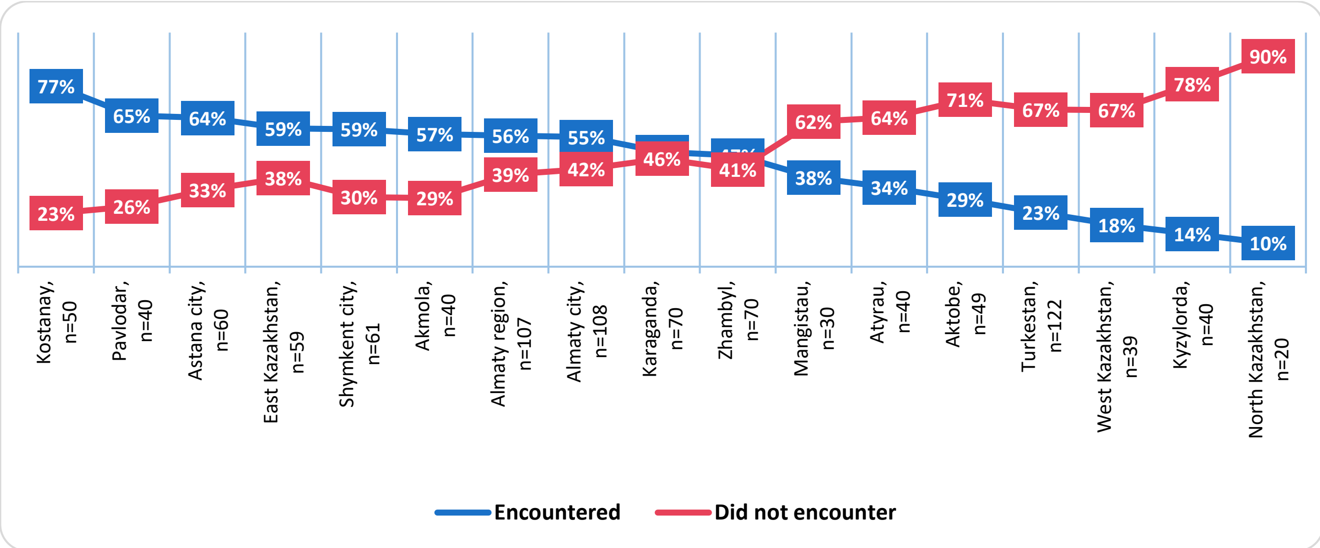
(44%) have not often encountered different coverage of political news. Thus, it can be assumed that it is the traditional media, i.e. radio and print that are more likely to generate different perceptions of political news among the audience.

Diagram 1.7.5. *Diverse Coverage of Political Events in Different Information Sources* ***(2023 y.)***



Survey data analysis by region of Kazakhstan shows significant differences in estimation of the prevalence of different coverage of political news in the local media. For example, in Kostanay region, 77% of respondents faced a similar situation, while in North Kazakhstan and Kyzylorda regions only 10-14% of respondents noted such cases.

Diagram 1.7.6. *Diverse Coverage of Political Events in Different Information Sources by Regions* ***(2023 y.)****, N=1005*



When faced with different coverage of political news, most respondents (42%) admit that they do not take any actions in response to it. Only 26% of respondents compare data from different sources, and even less, 17% of respondents, ask the opinion of others. The proportion of those sharing in social networks remains extremely low, only 5%. However, compared to 2021, the share of the audience that prefers not to take any steps increased from 31% to 42%. In general, since 2019, there has been a trend towards growing indifference, as well as a decrease in active and critical attitude of the audience towards different coverage of political events in the media.

Table 1.7.6. *Actions in Case of Different Coverage of the Same Political Event, N=466*

	2019	2021	2023
Compare information with what is written/shown in other media sources and make my own conclusion	35%	↓ 29%	↓ **26%**
I ask the opinion of friends, relatives, acquaintances and make my own conclusion	14%	↑ 17%	= **17%**
I trust only one source of information from which I always get information	11%	↑ 12%	↓ **9%**
Share my observations on social media	12%	↓ 9%	↓ **5%**
Do not take any steps	29%	↑ 31%	↑ **42%**
Not sure	0%	1%	**1%**
Total	**100%**	**100%**	**100%**

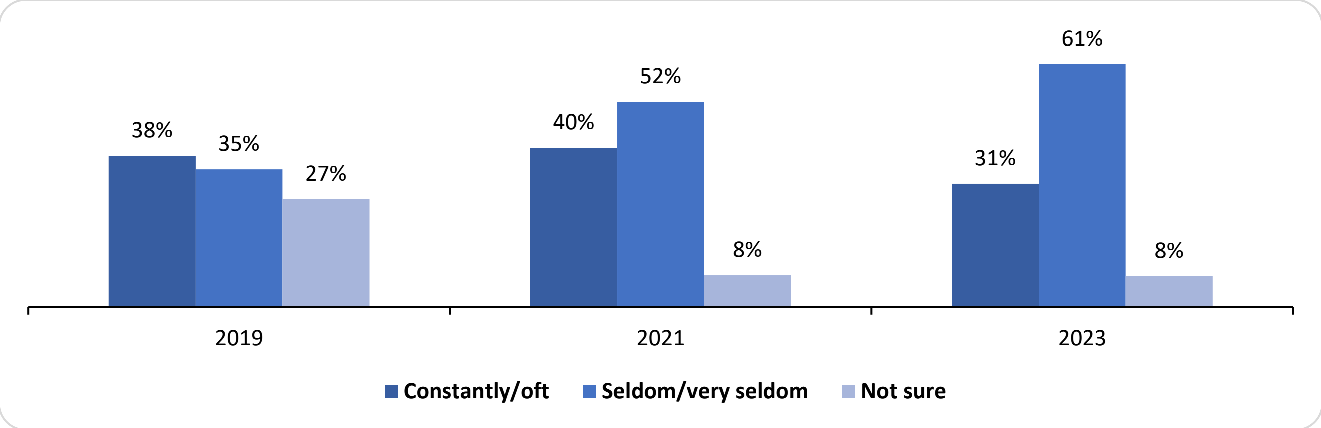
Ability to Critically Evaluate Information

In recent years, there has been a trend in Kazakhstan of increasing audience's confidence in the objectivity of information in the media. According to the survey for 2023, 31% of respondents experience a constant or frequent sense of deception when receiving information from the media. However, the majority (61 %) are faced with subjectivity and distortion of facts only occasionally.

The results of the 2021 survey confirm a positive trend in recent years: the proportion of those who experience persistent or frequent media deception declined from 40 % in 2021 to 31 % in 2023. At the same time, the percentage of respondents who rarely feel biased in the media has increased from 52% to 61%.

In the dynamics of recent years (2019-2023), the positive dynamics of media trust growth is even more evident; the proportion of respondents who rarely feel deception from the media increased from 35% in 2019 to 61% in 2023. Thus, despite the remaining issues, there is a general trend of increasing audience confidence in the objectivity of information in the media space. It should also be emphasized that this trend can be regarded as an indicator of critical attitude decrease among the audience towards information supplied by the media.

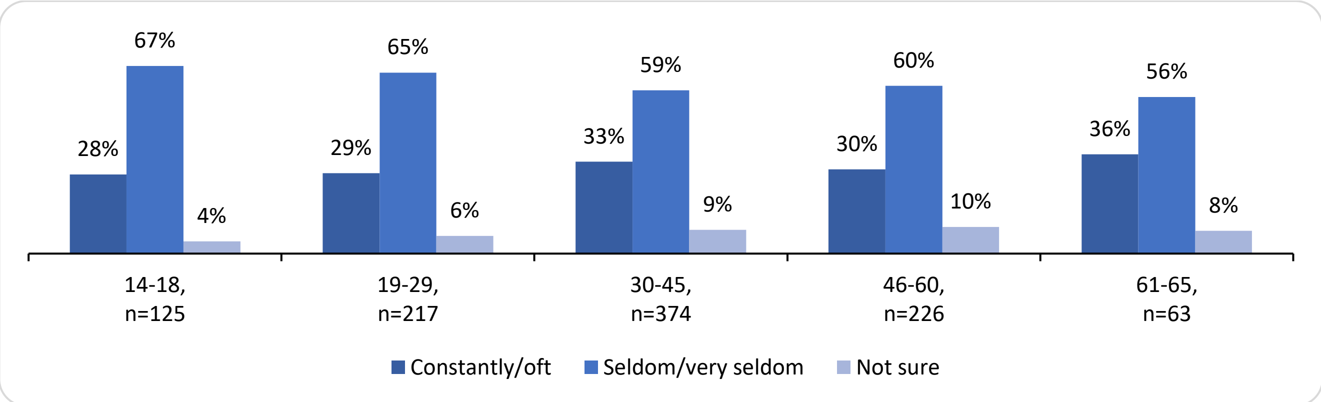
Diagram 1.7.7. *Frequency of Experiencing Deception When Receiving Information from Media, N=1005*



The data analysis by age group shows us the patterns as mentioned below:

- As the age of respondents increases, the proportion of those who experience permanent or frequent media deception rises, from 28% in the 14-18 age group to 36% in the 61-65 age group.
- Alongside with the age, the proportion of respondents who only occasionally encounter subjectivity and distortion of information in the media decreases, from 67% in the 14-18 age group to 56% in the 61-65 age group.

Diagram 1.7.8. *Frequency of Experiencing Deception When Receiving Information from Media by Various Ages* ***(2023 y.)****, N=1005*



Use of Alternative Sources of Information

According to the survey for 2023, more than half of respondents who are in doubt about reliability of information in the media prefer to search for additional information online (54%). A large proportion of respondents (22%) also expressed their willingness to seek clarification from other types of media, such as television, radio, print media. Such answers indicate the desire of the predominant share of the audience to actively check and analyze dubious news that raises questions about its credibility. However, almost one third of respondents are passive, refusing to waste time on additional testing (29 %), and one fifth rely on the opinion of their immediate social environment (21 %).

Analyzing the dynamics of answers over the past years, it is worth noting that one can see a gradual shift from passive consumption of content to a more rational and critical approach to information from the media. Thus, if in 2019 only 35% of respondents would choose to search for additional information on the Internet, then by 2023 this share increased to 54%. The appeal to additional sources of information, i.e. other media, is also growing; the readiness to directly request clarifications from the editorial office of the source is increasing too. However, the number of those who refuse to spend their time on checking news is decreasing, from 44% in 2019 to 29% in 2023.

Thus, in recent years the audience has shown a tendency to develop a more active citizenship and responsible attitude towards the information consumed.

Table 1.7.7. *Sources for Verification/Clarification of Information, N=1005*

	2019	2021	2023
Search for information online	35%	↑ 48%	↑ **54%**
Turn to friends, relatives, acquaintances	18%	↓ 17%	↑ **21%**
Search for information in other media (TV, radio, newspapers, magazines):	**17%**	↓ **13%**	↑ **22%**
- Search for information on TV channels	–	–	*12%*
- Listen to the news on the radio	–	–	*5%*
- Search for information in newspapers or magazines	–	–	*5%*
I will seek clarification from the editorial office of the source of dubious or incomplete information (i.e. editorial office of TV, radio, newspaper, website)	3%	5%	**4%**
I won't do anything/I won't waste time checking and clarifying the information	44%	↓ 33%	↓ **29%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

The survey results show that audience's approaches to the verification of media information depend on age. The largest proportion of those who would prefer to search for additional information online, is found in the young group of 14-29 years (66% and 61%). In the older generation, these rates are gradually declining, reaching a low of 34% in the senior age group of 61-65 years old. At the same time, middle-aged survey respondents are more likely to choose traditional media to check information: the willingness to access television, radio and print media is the highest at the age of 61-65 (30%) and noticeably lower among young people aged 14-29 (14-21%). Another pattern, from the younger age group to the older one, is that the proportion of those who are passive and would not waste time on additional news checking increases from 23% in the 14-18 age group to 37% in the 61-65 age group. Young respondents are thus more rational and critical, while older age groups are more likely to trust traditional media and less active in verifying information.

Table 1.7.8. *Sources for Verification/Clarification of Information by Age **(2023 y.)**, N=1005*

	Age categories				
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Search for information online	66%	61%	53%	49%	34%
Turn to friends, relatives, acquaintances	24%	21%	20%	22%	18%
Search for information in other media (TV, radio, newspapers, magazines):	14%	21%	20%	28%	30%
I will seek clarification from the editorial office of the source of dubious or incomplete information (i.e. editorial office of TV, radio, newspaper, website)	4%	3%	6%	3%	1%
I won't do anything/I won't waste time checking and clarifying the information	23%	26%	33%	26%	37%

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Perception of Mass Media and Internet

The results of the survey 2023 reveal interesting patterns in how the audience perceives the media and how they assess risks in the online space.

Speaking about the perception of public and private mass media, it is worth emphasizing that the vast majority (77%) are aware of the existence of both public and private media in Kazakhstan, which indicates a fairly high general level of understanding of the media market structure. However, a relatively small but significant proportion of respondents (39%) believe that only state-controlled media are able to produce quality content, preferring state-sponsored sources of information as more reliable and authoritative, despite being aware of private media.

Passing on to the topic of digital security, it is important to note that 71% of the respondents showed awareness of the potential risks related to publishing personal information on the Internet, which demonstrates the overall digital literacy of the audience. However, one should single out 19% of respondents who are willing to share their confidential data, such as passwords and access codes, to third parties. This fact indicates that, despite understanding the digital risks, some users underestimate the importance of keeping safe the personal information on the Internet.

Online anonymity and privacy is also highly topical issue. It is clear from the survey that 63% of respondents understand that personal data is constantly collected when using the Internet, namely, through cookies, IP addresses and other technical means. This is more realistic assessment of the situation. However, a significant proportion of respondents (36%) believe that the Internet allows to keep anonymity, and the user cannot be identified. This view is based on the fact that it is possible to communicate under nicknames without identifying personal information. This contradiction in respondents' views shows that a significant part of the audience does not understand the technological mechanisms of data collection and analysis on the Web.

As for perception of the Internet, one can also see interesting pictures: 63% of respondents believe that the Internet is primarily designed for entertainment and communication, thus expressing a rather inconsiderate opinion that does not take into account all the possibilities of the Internet. At the same time, 51% of respondents believe that thoughts and behavior of a person are completely independent of the information consumed in the media, which shows that respondents underestimate influence of the media and the Internet environment on the formation of public consciousness and worldview of the audience. Data on these statements reveal a mixed attitude of the Internet role in the society.

Table 1.7.9. *Perception of Mass Media and Internet*

		2019	2021	2023
1.	Newspapers, TV channels and Internet portals in Kazakhstan are both state-run and private (true)	48%	↑ 84%	↓ **77%**
2.	Some messages/information posted by a person online can negatively affect his/her career and private life (true)	56%	↑ 80%	↓ **71%**
3.	When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected (true)	52%	↑ 72%	↓ **63%**
4.	Internet is primarily a source for entertainment and communication (false)	32%	↑ 69%	↓ **63%**
5.	Thoughts and behavior of a person are completely independent of the information he/she consumes in the media (false)	33%	↑ 60%	↓ **51%**
6.	Only the state-run media can make quality products (false)	–	– 39%	= **39%**
7.	Internet allows you to keep anonymity - the user cannot be identified (false)	21%	↑ 40%	↓ **36%**
8.	It is sometimes permissible to give someone information about your passwords, code keys (bank, internet, etc.) (false)	16%	↑ 25%	↓ **19%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

In the dynamics of recent years. Comparing the data of 2021 and 2023 surveys, it can be noted that over the past two years there has been a trend towards a slight decrease in the level of media literacy of the population in terms of as follows: there is a slight decrease in the proportion of respondents aware of availability of different media types in Kazakhstan (from 84% to 77%); fewer respondents began to point out the risks of publishing personal information online (from 80% to 71%); the number of respondents aware of the collection of personal data online decreased (from 72% to 63%). At the same time, there are positive trends in some statements: the share of respondents who believe that the Internet allows them to remain anonymous decreased from 40% to 36%; the number of respondents who admit to sharing confidential data with third parties decreased from 25% to 19%.

Based on the abovestated comparison, we can conclude that over the past two years the dynamics of media literacy level of the population is decidedly mixed. On the one hand, there has been a slight decline in a number of indicators (awareness of the media market structure, understanding of risks on the Internet). On the other hand, respondents are more cautious about information security issues (anonymity, confidential data).

Age differences. Based on the survey data by age groups, the following key trends can be singled out:

- Thus, the smallest share of those who believe that only state-run media produce quality content is observed in the younger group of 14-18 years old (29%), but as age increases, this figure rises to 47% among the audience aged 61-65.
- The reverse trend is observed in the awareness of personal data collection on the Web: the highest level is demonstrated by the youth aged 14-18 (69%), while in older groups this indicator is significantly lower, reaching a minimum of 48% in the older group of 61-65 years old.

***Table 1.7.10.** Perception of Mass Media and Internet by Different Age Categories **(2023 y.)**, N=1005*

	Age				
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Newspapers, TV channels and Internet portals in Kazakhstan are both state-run and private	77%	79%	79%	75%	69%
Some messages/information posted by a person online can negatively affect his/her career and private life	74%	72%	71%	73%	63%
When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	69%	68%	63%	61%	48%
Internet is primarily a source for entertainment and communication	57%	64%	66%	60%	61%
Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	48%	52%	52%	50%	51%
Only the state-run media can make quality products	29%	36%	39%	45%	47%
Internet allows you to keep anonymity - the user cannot be identified	37%	39%	37%	32%	32%
It is sometimes permissible to give someone information about your passwords, code keys	20%	26%	16%	17%	17%

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Assessment of Media Literacy Level

This section presents the results of the analysis of information obtained from respondents regarding their ability to analyze and interpret media information. Respondents were given a number of judgments with predetermined "competent" (correct) answers. Thus, as a result of analyzing the "competent" answers to the provided statements, as well as a comparative analysis between the data for 2021 and 2023, a number of trends can be identified.

In particular, the share of respondents who gave a "competent" answer to the question that newspapers, TV channels and Internet portals in Kazakhstan can be both state-run and private, decreased from 79% in 2021 to 77% in 2023. At the same time, the share of those who believe that only state-run media are capable of producing quality products increased from 33% to 52%. This indicates a growing tendency to perceive the state-sponsored media as the only source of objective information.

Besides, there is an increase in the number of respondents who view the Internet primarily as a source of entertainment, from 28% to 33%. The share of those who do not believe that the media hast its influence on thoughts and behavior of the audience is also observed to remain the same (40% in 2021 and 41% in 2023). These data may indicate an increase in consumer attitudes toward the media and underestimation of their role in shaping public opinion.

At the same time, there is a positive trend in understanding the basics of information security. The share of respondents who believe that when using electronic means of communication, personal data is collected through cookies, IP addresses and other technical means increased from 57% to 63%. There are also more respondents who understand the danger of passing passwords and code keys to the third parties (up from 60% to 75%) and those who do not believe that the Internet allows them to remain anonymous (up from 48% to 55%).

Thus, there is a tendency towards a slight decrease in analytical skills of media content perception, with a simultaneous increase in awareness of technical information security issues.

Table 1.7.9. *Assessment of Media Literacy Level (Quantitative Data on "Competent Answers")*

No.	Judgement:	"Competent" answer	2021	2023
1	Newspapers, TV channels and Internet portals in Kazakhstan are both state-run and private	*True*	79%	↓ **77%**
2	Only the state-run media can make quality products	*False*	33%	↑ **52%**
3	Internet is primarily a source for entertainment and communication	*False*	28%	↑ **33%**
4	Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	*False*	40%	= **41%**
5	When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	*True*	57%	↑ **63%**
6	Internet allows you to keep anonymity - the user cannot be identified	*False*	48%	↑ **55%**
7	Some messages/information posted by a person online can negatively affect his/her career and private life	*True*	74%	↓ **71%**
8	It is sometimes permissible to give someone information about your passwords, code keys (bank, internet, etc.)	*False*	60%	↑ **75%**

Since skills in understanding media functioning are one of the components of media literacy, a media literacy assessment index was created for each survey participant based on their individual responses. This index was formed based on judgment scores that reflect how "competent" respondents were in responding to the judgments provided.

As noted above, for each of the eight judgments, a "competent" response was predetermined, corresponding to a high level of media awareness. In case the respondent's opinion coincided with the "competent" answer, he/she was awarded 1 point. Thus, based on the number of coincidences with the "reference" answers, an index of the media literacy level of each respondent was calculated. The maximum possible number of points is 8 (with 100% coincidence with all "correct" answers), the minimum - 0 (no coincidence with 'correct" answers).

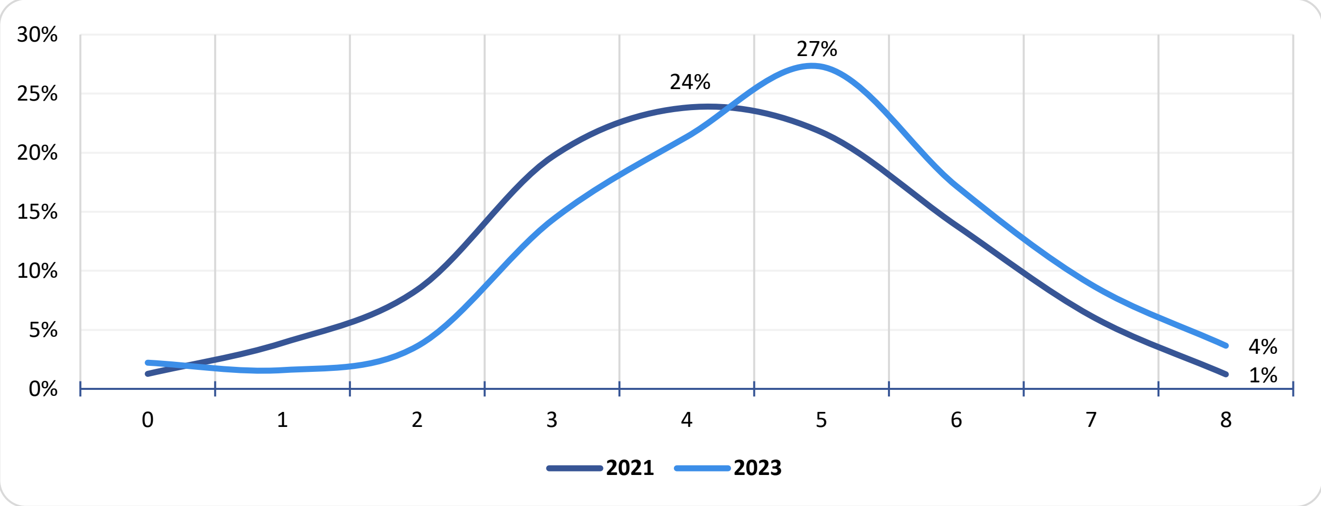
Thus, the data analysis shows positive dynamics in the distribution of respondents by the media literacy level. Over the period from 2021 to 2023, there was a trend towards a decrease in the share of respondents with low media literacy scores and a simultaneous increase in the number of citizens with advanced skills in analyzing and evaluating the media content. In particular, the share of those who scored 0-3 points decreased from 33% in 2021 to 22% in 2023. However, the share of respondents with high scores within the range of 5-8 points increased from 43% to 57%.

Moreover, if in 2021 the largest share of respondents scored 4 (24%), then in 2023 the group with 5 points (27%) took the lead. The share of those who scored the maximum score of 8 points also increased - from 1% to 4%.

As a result, the **average score for the country increased from 4.2 in 2021 to 4.7 in 2023**, indicating an increase in the media literacy level of the population of Kazakhstan.

Countrywise average score:
2021 – 4,2
2023 – 4,7

Diagram 1.7.8.1. Distribution of Respondents by Media Literacy Index (Percentage Share in Terms of Index Value)

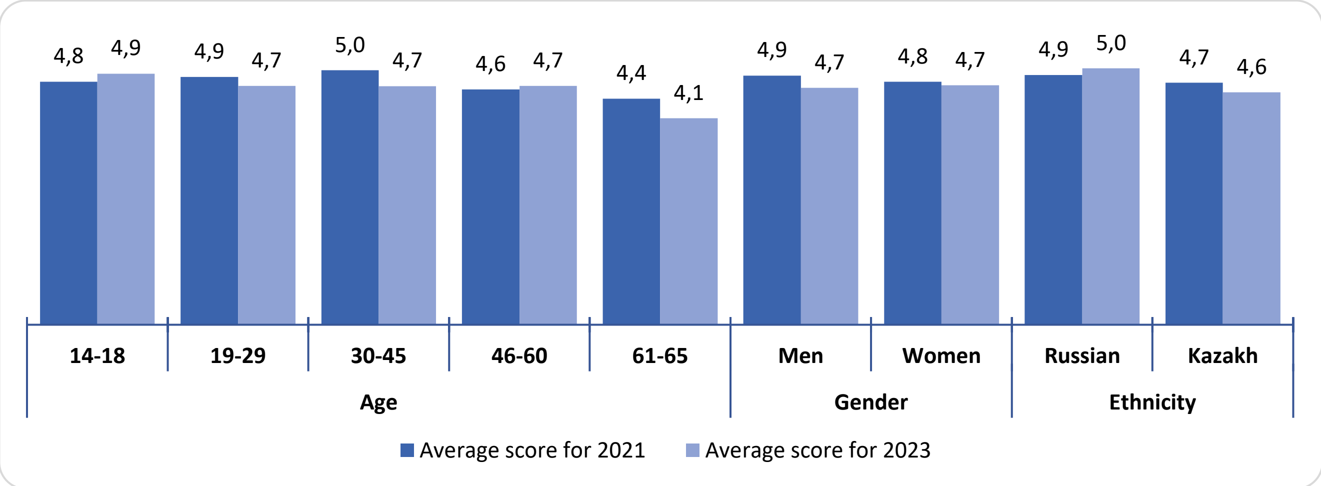


Data by age groups, gender and ethnicity allow us to analyze the dynamics of media literacy of the population of Kazakhstan more thoroughly. It should be noted that even though the differences in the dynamics of indicators between groups are not so significant, these small changes nevertheless deserve attention and more detailed consideration:

- In particular, if in 2021 the age group of 30-45 years old showed the highest indicators (5.0 points), then by 2023 this group shows a slight decrease in the average score to 4.7. Respondents over 61 years of age also show a noticeable decline in media literacy, from 4.4 to 4.1 points. In general, if in 2021 the leadership in media literacy belonged to respondents aged 30-45, then in 2023, higher results were shown by young people aged 14-18.
- In terms of gender, the trend data between men and women is almost identical: a slight decline from 4.9 to 4.7.
- Ethnically, representatives of the Russian community show an increase in the average score from 4.9 to 5.0, and the Kazakhs show a decrease from 4.7 to 4.6.

Thus, the most "vulnerable" groups with regard to media literacy decline are the groups aged 30-45 and over 61 years old, as well as ethnic Kazakhs.

Diagram 1.7.8.2. Average Score of Respondents on Media Literacy Index by Age, Gender and Ethnicity

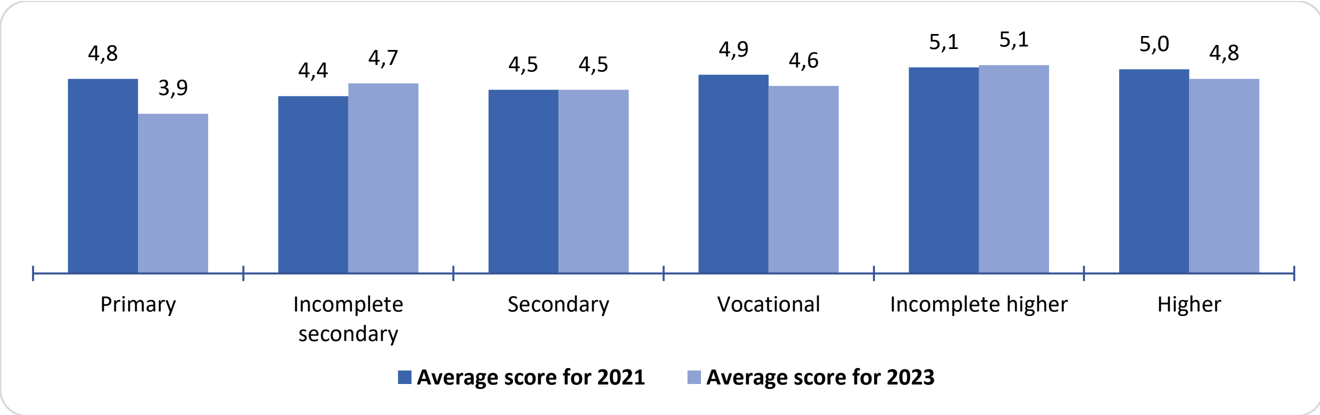


Analysis of the media literacy dynamics by educational groups shows the following:

- The most decrease in the rate is observed among respondents with primary education, from 4.8 points in 2021 to 3.9 in 2023. The decrease is also observed among those with vocational education (from 4.9 to 4.6 points) and with higher education (from 5 to 4.8 points);
- However, among persons with incomplete secondary education, there is a positive dynamics - an increase from 4.4 to 4.7 points.
- Among respondents with secondary and incomplete higher education, the level of media literacy remained stable, 4.5 and 5.1, respectively.

- Nevertheless, the highest scores in 2021 and 2023 are generally demonstrated by respondents with complete and incomplete higher education.

Diagram 1.7.8.3. *Average Score of Respondents on Media Literacy Index by Education Level*

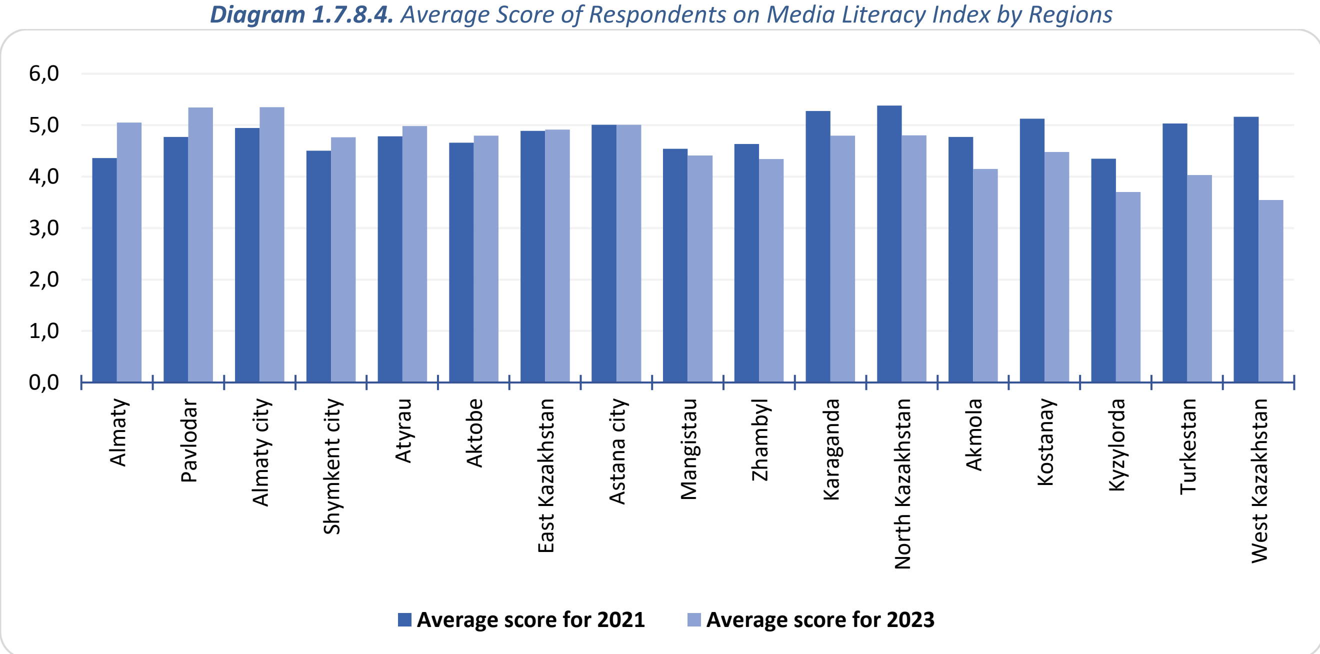


Analysis of the dynamics of media literacy level of the population by regions of Kazakhstan for the period 2021-2023 reveals the following trends:

- The most marked increase is observed in Almaty region, where the average score increased from 4.4 to 5.1. Positive dynamics is also seen in Pavlodar region (from 4.8 to 5.3), as well as in large cities, namely Almaty (from 4.9 to 5.3) and Shymkent (from 4.5 to 4.8).
- In East Kazakhstan region and Astana city the indicators remain stably high, 4.9 and 5 points respectively.
- The most significant drop in media literacy is observed in Kostanay (from 5.1 to 4.5), Kyzylorda (from 4.3 to 3.7), Turkestan (from 5 to 4) and West-Kazakhstan regions (from 5.2 to 3.5).

It is noteworthy that for the review period the leading regions in terms of media literacy of the population have changed. If in 2021 the highest indicators were demonstrated by Karaganda, North-Kazakhstan and West-Kazakhstan regions, then in 2023 the leading positions were taken by Almaty and Pavlodar regions, as well as Almaty city.

Diagram 1.7.8.4. *Average Score of Respondents on Media Literacy Index by Regions*



Internet Threat Perception

While the Internet is a powerful source of information and opportunities, it also comes with risks that are of concern to the audience. According to the 2023 survey, the majority of respondents are concerned about technical threats and obtrusive advertising when using the Web: the largest share of respondents (50%) mark malicious sites and viruses as the factor causing the greatest concern; the second most important factor is the excessive amount of unfair advertising on the Internet (34%). Concerns about the possible use of personal data by intruders are expressed by 26% of respondents, while 23% of respondents expressed concern about the presence of negative and illegal content on the Internet.

The remaining factors received less than 20% of votes, but their presence on the list also reflects users' perceptions of Internet problems such as biased content, pseudoscience, and excessive religiosity. Moreover, 23% of respondents say that they do not have any concerns about Internet threats.

Thus, the results demonstrate that the audience is still wary of standard technical threats and personal data abuse, as well as concerns about dishonest content.

In the dynamics of recent years. Comparing data from 2023 and 2021, we can note a slight decrease in users' concerns about both use of personal data by intruders (from 37% to 26%) and negative and illegal content (from 28% to 23%). As for technical threats, the percentage of respondents concerned about malicious websites and viruses has decreased from 57% in 2021 to 50% in 2023. However, these are still the most common sources of concern for online users.

Along with this, the percentage of those who are not worried about anything on the Internet increased from 14% in 2021 to 23% in 2023. This may indicate an increase in the number of users who feel confident and safe when working online. Thus, comparing the data of the two years, there is a slight decrease in user concerns.

Table 1.7.11. *Internet Threat Perception*

	2019		2021		2023
Malicious websites (viruses)	19%	↑	57%	↓	**50%**
Abundance of deceptive advertising	7%	↑	34%	=	**34%**
Posting personal information that can be used by intruders	7%	↑	37%	↓	**26%**
Resources with negative and illegal content	6%	↑	28%	↓	**23%**
Obtruding a point of view, e.g. when reporting on conflicts	–		–		**16%**
Excessive religious content	–		17%	↓	**15%**
Pseudoscientific propaganda	–		18%	↓	**15%**
Ignoring the real problems, smoothness of a common picture	–		16%	↓	**11%**
Nothing causes concerns	77%	↓	14%	↑	**23%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

When faced with various threats on the Internet, users have different approaches to the question of where they can ask for help:

- When faced with malicious sites, the largest share of respondents (14%) would first turn to professional technical experts for help.
- When personal data privacy is breached, the vast majority of respondents (32%) say they will contact law-enforcement agencies.
- In cases of unsuitable content (obtruded opinions, religious propaganda, pseudoscience, negative content, obtrusive advertising), the most common reaction among respondents is to ignore these problems and refuse to do anything with it, from 11% to 19%. This may indicate that part of the audience either does not consider such problems serious or does not know where to turn in such cases.
- It is worth noting that almost all the respondents to some extent consider contacting law enforcement agencies when faced with various Internet threats, from 5% to 32%.

Thus, it can be noted that the choice of actions when faced with online threats depends on the type of the problem itself. In the case of technical and legal threats, there is a clear understanding of where to turn to for help, while in the case of content threats there is no such unity: some people consider turning to law enforcement agencies, while others prefer just ignoring the problem.

Table 1.7.12. *Appeals in Case of Online Treats and Illegal Content* ***(2023 y.)***

	To law-enforcement agencies	To IT specialist	Will talk to friends, relatives	To site administrator	Will not appeal to anyone/ anywhere
In case of malicious sites, n=502	7%	14%	4%	–	7%
In case of abundance of deceptive advertising, n=343	6%	–	–	4%	12%
In case of confidentiality breach, n=261	32%	–	–	–	8%
In case of negative and illegal content, n=233	8%	–	–	–	11%
In case of obtruding a point of view, n=159	6%	–	–	–	19%
In case of excessive religious content, n=152	8%	–	–	–	17%
In case of pseudoscientific propaganda, n=151	5%	–	–	5%	19%
In case of ignoring the real problems, n=114	6%	–	–	–	11%

** Answer option "Not sure" is not shown in the table.*

Ensuring Data Security

Assessment of Information Literacy and Digital Skills Level

This section examines the level of information literacy and digital skills of the respondents. For more detailed analysis, this section can be divided into two parts:

1. Information literacy skills and competencies
2. Index of information literacy and digital competencies

In the first part, we will analyze what information security skills and digital competencies the respondents can use in practice. Respondents were asked what specific measures they took to ensure the security of their personal data. Responses were shown in the form of three options: "Can do it", "Can apply in practice" and "Cannot do it". In this part of the section, we will assess the percentage of respondents who selected options "Can do it" and "Can apply in practice" to determine how widespread these skills are among the Kazakhstani audience.

1. Information literacy skills and competencies

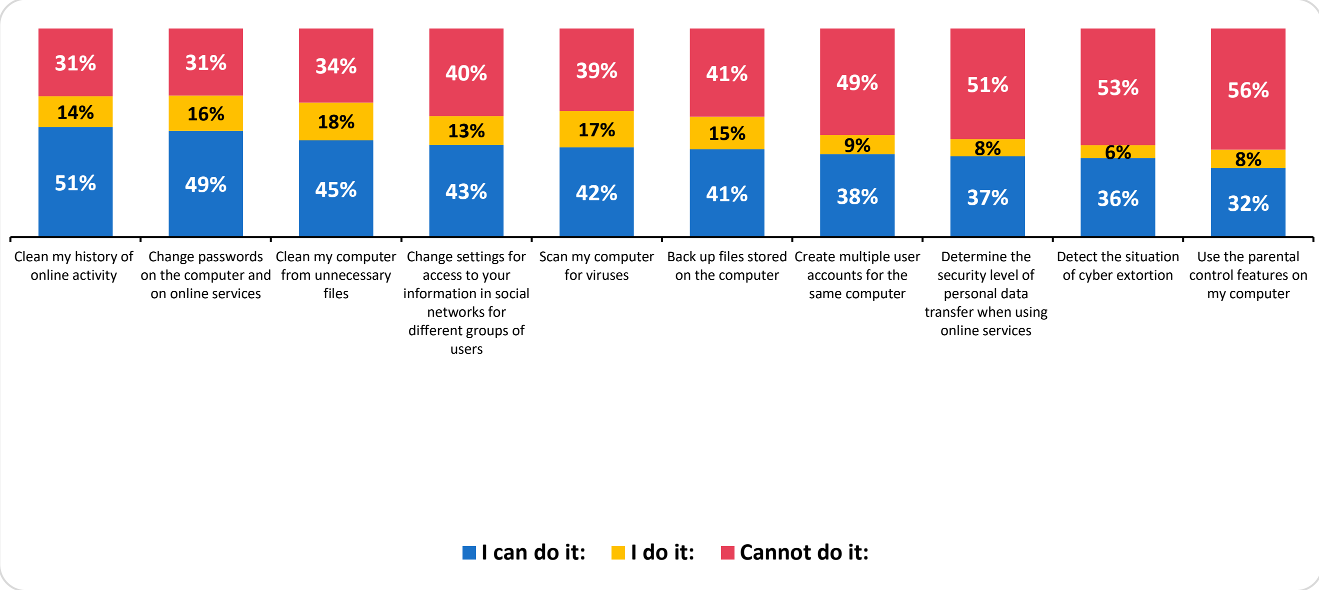
In the time of widespread digitalization, the issue of information security and online privacy is of particular relevance. However, the results of the 2023 survey show that about half of the audience, despite possessing basic skills in personal data protection, do not use them actively enough in practice.

For example, 51% of respondents say they know how to delete their online activity history. However, only 14% do this in practice on a regular basis. The situation is similar with other basic skills: 49% know how to change passwords, 45% know how to clean a computer from unnecessary files, 43% know how to set up privacy in social networks, and 42% know how to scan a computer for viruses. However, only 13-18% of respondents put this knowledge to use.

Significant gaps are observed in advanced online security skills. Only about one-third of the audience knows such tools as multiple accounts (38%), privacy evaluation when using Internet services (37%) and Internet fraud detection (36%) but only 6-9% use these features on a regular basis.

Thus, despite the general understanding of the importance of security, there is a significant lack of practical skills and competencies among users, especially with regard to advanced security tools for online privacy.

Diagram 1.7.9. Availability of Skills to Ensure Data Security (2023 y.), N=1005



** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

In the dynamics of recent years. Compared to 2021, in 2023 we can note a significant increase in the number of users with advanced skills to protect privacy online. In particular, the share of those who know how to create multiple accounts increased from 18% to 38%, determine the online services security – from 21% to 37%, and recognize online fraud – from 18% to 36%.

As for basic digital security skills, here we can see a mixed dynamics. On the one hand, the ability to clean a computer has increased from 40% to 45%, to backup files – from 22% to 41%, to use parental control – from 14% to 32%. On the other hand, there was a slight decrease in the skill of deleting online activity history (from 54% to 51%) and changing passwords (from 54% to 49%). Thus, there is a positive trend in advanced skills, while there are mixed trends in basic skills.

However, compared to 2019, there is a significant increase by 2023 in the share of users with both basic and advanced information security skills. Nevertheless, despite some positive shifts, the problem of ensuring information security of users remains relevant.

Table 1.7.13. Availability of Skills to Ensure Data Security

I can:	2019	2021	2023
Clean my history of online activity	41%	↑ 54%	↓ **51%**
Change passwords on the computer and on online services	42%	↑ 54%	↓ **49%**
Clean my computer from unnecessary files	32%	↑ 40%	↑ **45%**
Change settings for access to your information in social networks for different groups of users	30%	↑ 33%	↑ **43%**
Scan my computer for viruses	32%	↑ 37%	↑ **42%**
Back up files stored on the computer	18%	↑ 22%	↑ **41%**
Create multiple user accounts for the same computer	19%	↓ 18%	↑ **38%**
Determine the security level of personal data transfer when using online services	11%	↑ 21%	↑ **37%**
Detect the situation of cyber extortion	9%	↑ 18%	↑ **36%**
Use the parental control features on my computer	9%	↑ 14%	↑ **32%**

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

Age differences. The level of information security skills differs significantly between age groups of Internet users. Among young people aged 19-29, the share of those who possess basic information security skills is 43-67%, the highest among all groups. In the younger group of 14-18 year olds, the level of basic data security skills is also high, 37-65%. Thus, young people aged 14-29 demonstrate the highest literacy level with regard to personal data protection on the Internet. However, the situation has changed in older groups: among respondents aged 30-45, the share of those who possess information security skills decreased to 34-53%, in the group aged 46-60 decreased to 19-36%, and over 60 years old to 11-22%.

Consequently, the dynamics of age groups indicates that young users have higher digital competence and more often face the necessity to comply with information security rules when using the Internet.

Table 1.7.14. *Availability of Skills to Ensure Data Security by Age* ***(2023 y.)****, N=1005*

I can:	Age				
	14-18, n=125	19-29, n=217	30-45, n=374	46-60, n=226	61-65, n=63
Clean my history of online activity	62%	64%	53%	36%	22%
Change passwords on the computer and on online services	65%	67%	50%	32%	15%
Change settings for access to your information in social networks for different groups of users	59%	60%	42%	25%	13%
Create multiple user accounts for the same computer	51%	59%	38%	19%	11%
Clean my computer from unnecessary files	58%	59%	46%	31%	19%
Scan my computer for viruses	51%	58%	43%	26%	19%
Back up files stored on the computer	55%	58%	42%	23%	13%
Use the parental control features on my computer	37%	43%	34%	20%	11%
Detect the situation of cyber extortion	43%	47%	37%	26%	15%
Determine the security level of personal data transfer when using online services	47%	53%	36%	24%	14%

** Amount is not equal to 100 percent as respondents could mark more than one answer option.*

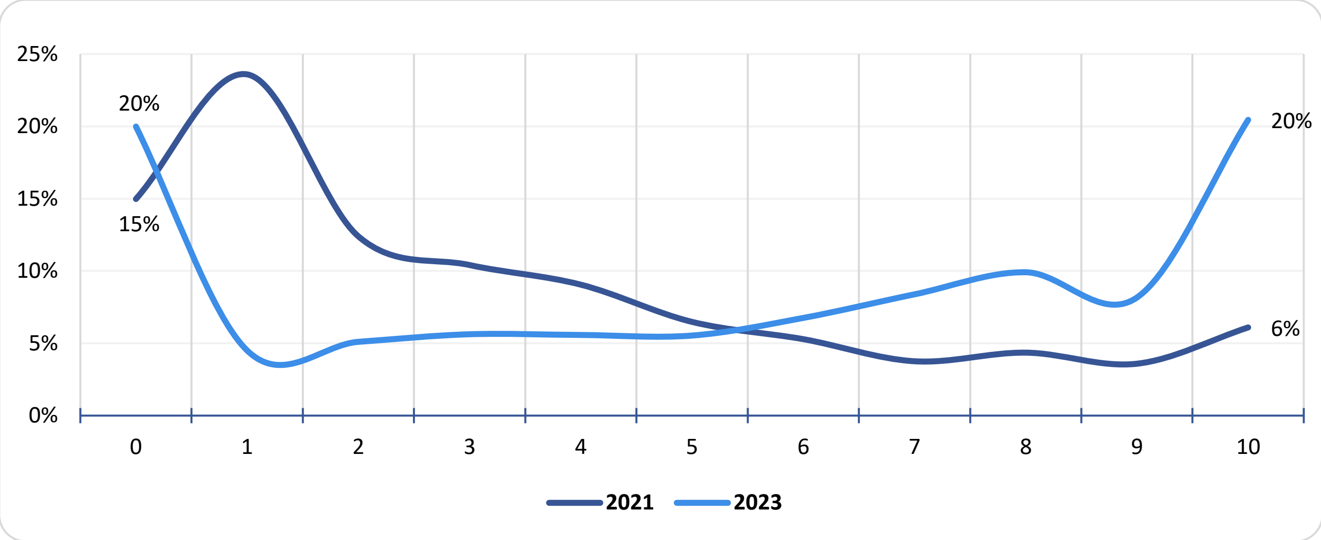
2. Index of Information Literacy and Digital Competencies

In this part of the section we will analyze the index of information literacy and digital competencies. This index was formed on the basis of respondents' answers to 10 statements related to information security skills and digital competencies. Each respondent received an individual score equal to 1 if he/she selected the options “Can do it” and “Can apply in practice” and 0 if he/she selected “Cannot do it”. Thus, we will determine the index of information literacy and digital competencies of each respondent, which can range from *0* to *10.* This index will allow us to assess more accurate the level of digital literacy and competence of our respondents. In order to identify changes and dynamics in the level of information literacy, we will also conduct a comparative analysis of indexes for 2021 and 2023.

Thus, the analysis results of indexes for 2023 show positive dynamics in the level of information literacy and digital competencies of the population of the Republic of Kazakhstan compared to 2021. In particular, the share of respondents who scored *0* points on the information literacy index decreased from 20% to 15%, while the share of those who scored the maximum *10* points increased from 6% to 20%. However, still about a third of respondents (30%) scored between *0* and *2*, indicating that there is a significant proportion of the population with low level of information literacy and digital competencies. Nevertheless, compared to 2021, this indicator has grown significantly, with more than half of respondents (51%) scoring between *0* and *2* in 2021. It should also be noted that in 2023, more than half of respondents (54%) achieved scores between *6* and *10* points, while in 2021 this level was achieved only by a quarter of respondents (24%). Consequently, the countrywise average score increased from 3,3 in 2021 to 5,4 in 2023, indicating an overall increase in the level of information and digital skills across the population. Thus, we can see the positive dynamics and at the same time the necessity for further work to improve information literacy and digital skills among the residents of Kazakhstan.

Countrywise average score:
2021 – 3,3
2023 – 5,4

Diagram 1.7.9.1. Distribution of Respondents by Index in Terms of Information Literacy and Digital Competency (Percentage Share in Terms of Index Value)



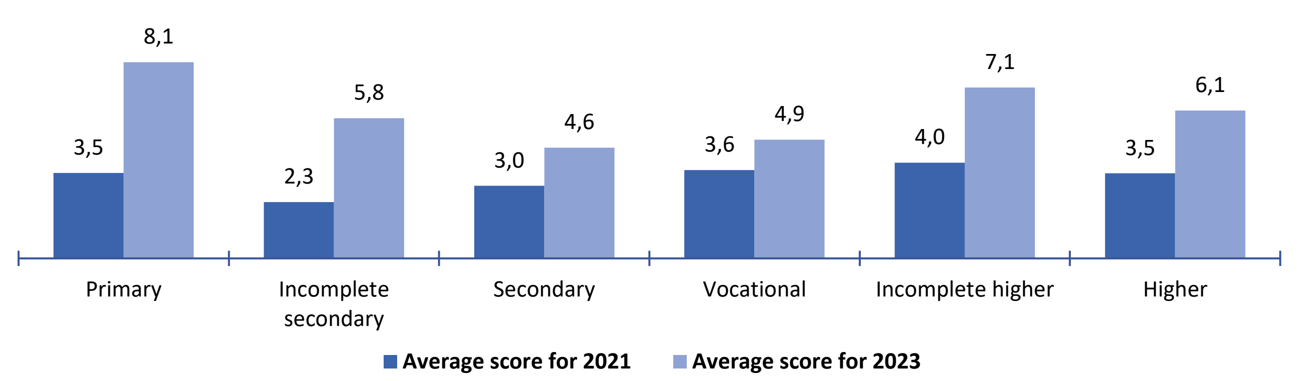
Having analyzed the data of the index with regard to information literacy and digital competencies in the context of age groups, gender and ethnicity, the following conclusions can be drawn:

- The highest indicators of information literacy are traditionally demonstrated by young people aged 14-18 (growth from 3.6 to 6.9) and middle-aged people of 19-29 years old (growth from 3.8 to 7.1) – the leadership of these age groups was held both in 2021 and 2023. The level of information literacy naturally decreases with the age, and this trend is still on in both 2021 and 2023. The lowest indicator (1.8 points) is noted in the older group aged 61-65. Nevertheless, it is important to note that in 2023, positive dynamics of information literacy level is observed in all age groups.
- Positive dynamics is observed in increase of the level of information literacy among both men (from 3.5 to 5.1) and women (from 3.2 to 5.7) compared to 2021. At the same time, the growth is particularly noticeable among women. It is noteworthy that while in 2021 men were the leaders, in 2023 the leadership went to women, whose level of information literacy was higher.
- By ethnicity, Russians are the leaders, whose average score increased from 3.9 in 2021 to 6.4 in 2023. Kazakhs also show positive dynamics (growth from 3 to 5), but the level of information literacy is still lower than that of Russians, and this trend is still on in both 2021 and 2023.

Diagram 1.7.9.2. Average Score of Respondents on Media Literacy and Digital Competency Index by Age, Gender and Ethnicity

Analyzing the data on information literacy level in the context of respondents' education, we can note a general positive dynamics of growth among all groups of respondents with different levels of education. At this time, the greatest growth in 2023 compared to 2021 is demonstrated by respondents with primary education (growth from 3.5 to 8.1) and incomplete higher education (growth from 4 to 7.1). It is of interest to note that, if in 2021 the group with incomplete higher education was the leader, then in 2023 the respondents with primary education took the first place, showing the greatest increase in information literacy.

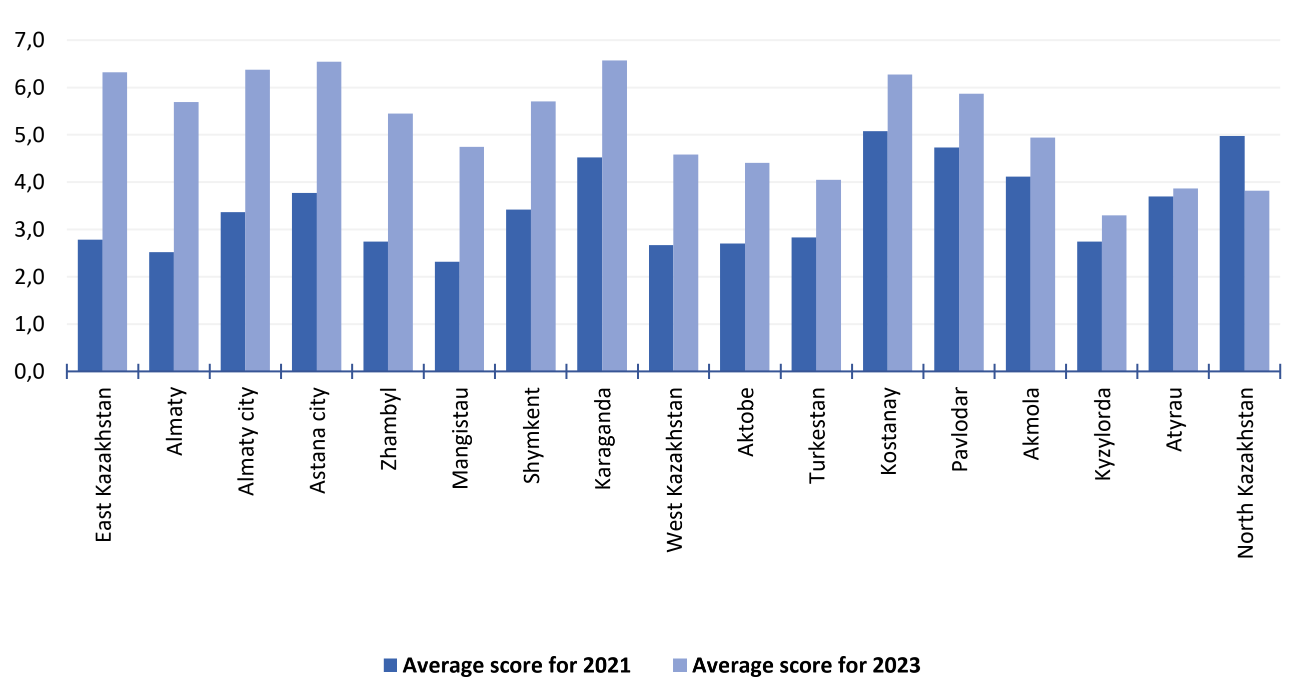
Diagram 1.7.9.3. *Average Score of Respondents on Media Literacy and Digital Competency Index by Educational Level*



Having analyzed the data on information literacy level in the context of regions of Kazakhstan, it can be noted that in almost all regions there is a positive dynamics of growth of the average score from 2021 to 2023. This indicates general positive shifts on a national basis.

- Significant growth is observed in East Kazakhstan (from 2.8 to 6.3), Almaty (from 2.5 to 5.7) and Karaganda (from 2.7 to 4.6) regions. Marked increase is also seen in large cities such as Almaty (from 3.4 to 6.4), Astana (from 3.8 to 6.5) and Shymkent (from 3.4 to 5.7).
- Relatively low indicators in 2023 remain in Kyzylorda (3.3) and Atyrau regions (3.9). An interesting point is the change of the situation in North-Kazakhstan region: in 2021 this region was one of the leaders in terms of information literacy. However, in 2023, this region is the only one that marks a decrease in the information literacy index from 5 to 3.8.
- Information literacy indicators in Kostanay, Pavlodar and Akmola regions remain stable: both in 2021 and 2023, these regions still have the highest information literacy indices.
- One should also pay attention to changes in the leading regions: if in 2021 the highest indices were seen in Kostanay, North-Kazakhstan and Pavlodar regions, then in 2023 the leading positions were taken by Karaganda region, as well as the cities of Astana and Almaty.

Diagram 1.7.9.4. *Average Score of Respondents on Media Literacy and Digital Competency Index by Regions*

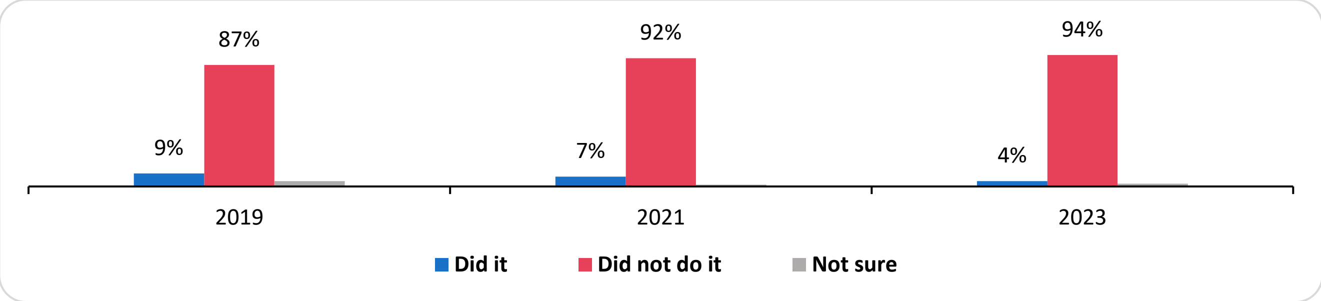


Apply to Editorial Offices of Mass Media

According to the survey results, the audience does not often use the possibility of feedback with the media. Thus, according to the survey results 2023, there is an extremely low level of interaction between the audience and the media for feedback, only 4% of respondents noted that they had ever contacted the editorial office to receive reliable information, expressed complaints or got information about a problem. At the same time, the overwhelming majority, 94%, do not have such experience.

Alongside with this, there is a downward trend in the share of the audience having experience of feedback over the recent years, namely from 9% in 2019 to 4% in 2023. At the same time, the share of those who have no such experience is growing, from 87% to 94%. Decline in the feedback indicator and growth in the share of passive information consumers in recent years may indicate that the media are somewhat closed to direct interaction with audience and are insufficiently responsive to their requests.

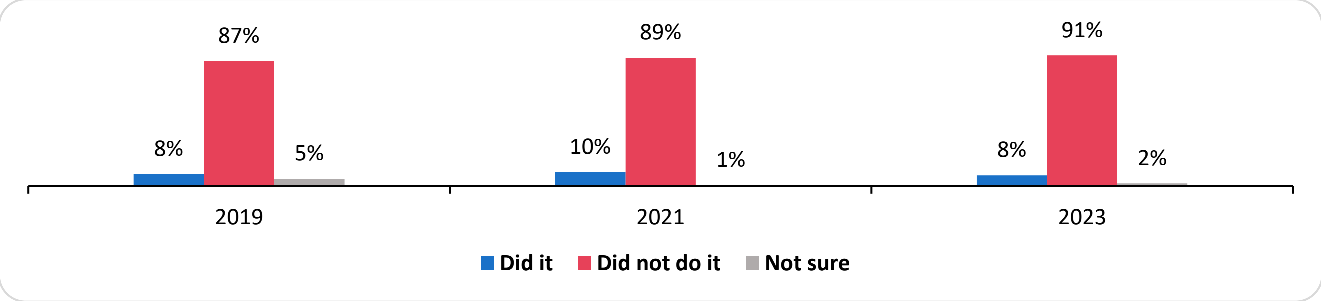
Diagram 1.7.10. *Apply to Editorial Offices of Mass Media* ***(2023 y.)****, N=1005*



Participation in Interactive Formats of Mass Media

The level of using interactive media communication opportunities by the audience also remains low. According to the survey 2023, only 8% of respondents said that they had ever called-in live radio or TV show, while the vast majority (91%) had no such experience. In the dynamics of recent years, the share of the actively interacting audience remains consistently low, 8-10% in different years. This indicates a relatively weak development and insufficient use of conversational format in the media, as a result of which the level of audience involvement in interactive communication with the media is still low.

Diagram 1.7.11. *Participation of Interactive Formats of Mass Media* ***(2023 y.)****, N=1005*



1.8. Qualitative Survey Results

Within the framework of the research, 5 expert interviews were conducted with media literacy specialists, representatives of media and advertising business, as well as sociologists of the Republic of Kazakhstan.

Objectives of expert interviews:

- Verify qualitative data collected in a result of mass survey of the population based on expert opinion.
- Collect the expert estimates with regard to the situation in media environment, current problems of media environment.
- Present current information about the media environment to the expert community, building up the expertise of the media community.

The following tasks were set as a part of the research:

- Identification of the media environment structure, expectations and preferences of the audience.
- Determination of popular sources of information (TV, radio, print media, online media, social networks) and the level of trust in them.
- Finding the preferences in different types of media and preferences for different means of accessing media content (TV, radio, computer, cell phone, smartphone and tablet).
- Determination of media and digital literacy level of the audience.

Analysis of media environment development in Kazakhstan based on expert interviews demonstrates the main trends, media needs and preferences of the population.

1.8.1. Scope of Evaluation Research of Experts

Range of Issues that Experts Work With

The issues dealt with by the interviewed experts cover a wide range of spheres:

- social journalism: problems of large families, families with children with disability, socially vulnerable groups of the population, gender issues;
- political journalism and investigative journalism: issues of construction of state-owned facilities, corruption, political inclusion;
- range of issues of Kazakh- and Russian-language media: similarities and differences, discourses present;
- data journalism;
- media criticism: ethical norms and violations of basic standards of journalism, current problems in the media sphere;
- current media discourses, values transmitted by the media, influence of the media on the society, and on cultural space of Central Asia;
- technologies and transformation process of Kazakhstan's media market, digital and traditional media in Kazakhstan;
- media in related spheres (retail, IT, banks);
- media analysis, distribution, development strategies of TV companies.

1.8.2. Media Consumption of the Population

1.8.2.1. Modern Media Consumption

As follows from the analysis of experts' answers relating to characteristics of modern media consumption in Kazakhstan, the following key ideas can be highlighted:

Significant role of social networks in information search and consumption. All experts note the growing importance of social networks (primarily Tik-Tok, Facebook, Instagram and Telegram channels) for obtaining information in Kazakhstan. According to experts, people are increasingly consuming news and media materials on social networks without visiting the media websites themselves.

"In general, the population consumes information on social networks such as Tik-Tok and Facebook rather than visiting any websites. Even our own website statistics show an increase in traffic through going to social networks. People don't go to the website intentionally, they go to our content through links posted on social media. If something interests them, they follow the link and read the materials. It should be added that one can see now a trend in Kazakhstan towards the popularity of anonymous Telegram channels."

"Less than a month ago we had a news story on a rather unpleasant topic related to a case of abuse of a little girl, which we presented in Tik-Tok in Kazakh without any cuts. This three-minute story hit 1,300,000 views in just 5 days, or maybe even 3 days, depending on the social network. On Tik-Tok, almost anything can go viral, except for official content. The Kazakh-speaking audience mainly consumes information from Facebook and Instagram, while the Russian-speaking audience mainly prefers Telegram."

"Gradually, all media will move to social networks. Nowadays, more and more intermediaries emerge between the website and the reader. For example, some information comes out on Tengri News and in order for the end consumer to get some information from the website, it usually has to go viral on social networks so that a person sees the link and goes to the website. People do not really actively follow links, their consumption has become more passive. Everyone wants to get all the information in a nutshell. It means the culture of media consumption is also changing rapidly along with the growth of social networks population. This process is going on gradually, with introduction of such formats as short videos of 30 seconds, captioned pictures or one text paragraph. Things are gradually moving in this direction. We have tried to fight with it, but I think it is a losing battle. Changes in information consumption are happening pretty fast and will continue doing so."

Social networks as a supplement to traditional media. There is no definitive opinion in the expert community as to whether social media supplant or complement the traditional media as a source of information about life in the country. Some experts believe that social networks are definitely dominant because traditional media such as newspapers and magazines are in decline. Others take a more moderate position and believe that at least half of the population uses social networks to get information, but the key role in shaping the primary information agenda still belongs to official media.

"In my opinion, although a significant part of the population (at least half) gets information from social networks, the primary source of content is traditional media. I believe that information on social networks usually does not spring out of nowhere, it is borrowed and retold from materials created by media operating on the Internet and TV. In my opinion, at least 50% of the information content on social networks are borrowed and retold publications of traditional media. Nowadays, I think, it is the media that remains the main source of information content generation, which is distributed then through social networks and interpersonal communication.

Turning to traditional media when high-profile events occur. Despite the dominance of social media, people still turn to traditional media for accurate information during significant events.

“In most cases our people turn to the media if something so eventful happens. For example, during the January events, people looked for information in the media, not on social networks, because they wanted to find accurate, reliable information, and they turned to the official media or to media affiliated with the authorities, such as Tengri News, which is considered the major national news outlet."

Differences in media consumption between Kazakh- and Russian-speaking audiences. The Kazakh-speaking audience prefers national content in a modern presentation, with elements of intrigue and melodrama. It is also characterized by interest in everyday topics. The Russian-speaking audience is more heterogeneous in its preferences. They can watch both Russian and Kazakh content. At the same time, it is characterized by an intense interest in Russian TV series and TV shows.

“If we are talking about the Kazakh-speaking audience, they prefer something modern with a national colour and even a bit spicy*, so to speak. I can give the same example we had; the programs such as “Kalaulym”, “QosLike”, “Bir Bolaiyk”. As for the Russian-speaking audience, it is a little bit specific. It is sometimes so ambiguous; it can consume in principle something in Kazakh, something in Russian, it can consume content that the Russian media provide us as programs or projects, and it can consume something local”.*

Continued popularity of television in rural and remote areas due to underdeveloped internet. Due to poor mobile internet coverage in rural areas, people have to rely on television as their main source of news and information. This applies not only to remote villages, but also to outskirts of large cities, where internet connection is also a problem.

Audience interest in high-profile news, regardless of language. High-profile and hard-hitting news and events attract increased attention of the audience in Kazakhstan, regardless of language preferences.

“Let us say, we take for example the cartoon ‘Masha and the Bear’ - it gains a huge number of views at different times of the day, including morning, evening, and even nearly at night, because it is children's content. However, if you take some eye-opening information such as the recent case of Beibut Shumenov, it will have resonance and discussions among both Kazakh and Russian-speaking audience. This happens because the person is famous, there was a high-profile incident that caused a wide public resonance in the country."

1.8.2.2. Demographic Features of Media Consumption

Differences in media preferences and content consumption patterns between the Kazakh- and Russian-speaking population of Kazakhstan are noted by experts as one of the key features of the modern media environment in the country.

Differences in interests and preferences of Kazakh- and Russian-speaking audiences. Recently for the Kazakh-speaking audience the most popular topics are those related to language policy, decolonization, independence of Kazakhstan and geopolitical risks, which can be explained by the relevance of political events and processes in the country. It should also be noted that within the Kazakh-language media there is an active discussion of traditionalism, i.e. the content related to discussion and observance of traditions, customs and lifestyle has resonance among the audience representing this traditionalism. There is also interests of Kazakh-speaking audience for information about drawings, ways to make quick money and financial pyramids, especially among the audience with low socio-economic status. These are mainly people from rural areas and suburbs, often in difficult financial situations and dependent on loans. At the same time, Russian-speaking information consumers are oriented towards economic news and analytics, as well as show interest in future political changes in the country.

“Nowadays among the Kazakh-speaking audience the topics related to the Kazakh language, decolonization, independence of Kazakhstan, as well as risks and threats from Russia and other neighboring countries such as China, Uzbekistan and Kyrgyzstan are very topical. The topics of politics and language are very popular. Among the Russian-speaking population, on the contrary, such issues as economic aspects, interviews with foreign analysts about the future of Kazakhstan and

political changes within the country are more relevant. Of course, Kazakh speakers are also interested in these issues, but to a lesser extent compared to the Russian-speaking audience."

"Interests of the Kazakh-speaking audience are usually related to information for people of low socio-economic status. That is, information about some drawings, financial pyramids etc. is consumed purely by the Kazakh-speaking audience. Such trend is seen mainly in rural or suburban audiences, where people are in loans and credits over head and ears. Accordingly, information is consumed there in this way. The advertising demand for such information is, for example, as follows: where to obtain a credit, where to earn quick money, etc. Moreover, if we consider the Kazakh-language media, the interests are more on some issues of traditional way of life: discussion of customs, how well they are observed now, and so on. I would not call it ***culture****, it is just some kind of traditionalism. This particular content is pretty popular in the Kazakh-language media."*

Popularity of entertainment content. The emphasized high demand for entertainment content becomes a key trend that unites both language groups. Music radio broadcasting, comedy shows, reality shows and TV series are considered beloved forms of entertainment, supporting their desire for 'bread and circus'. As for issues of political and economic information, there is a limited interest in it. These topics attract attention only if there are '*hype'* events. In general, the priority is given to entertainment content, which remains relevant in both Kazakh and Russian languages.

"As for the Russian-speaking audience, it is indeed different from the Kazakh-speaking audience, because here the demand is for entertainment content, by the way, in the Kazakh-speaking audience as well. The Kazakh-language media with entertainment content, i.e. radio with Kazakh music, something like that, is popular in two languages. In Russian, entertainment content is still at the top."

"Interests in information of political and economic nature are actually for a rather narrow audience. Such topics become popular only when they have viral impact, ***to take away and divide****, along those lines. Still, I believe that entertainment content takes the priority in both languages."*

Age preferences. Age of the audience also adjusts the preferences. Having analyzed the opinions of experts, we can point out that certain programs and content are oriented to specific age groups. For example, the show "QosLike" attracts the audience aged 18 to 35. This generation is interested in entertainment content that reflects their life interests and values. On the other hand, high-profile news can draw attention of different ages, including 60-year-old viewers. However, content related to cooking and household issues tends to resonate with housewives between the ages of 23 and 33.

"If we take, for example, the show "QosLike", it's not going to be watched by grandparents who are over 60. It is popular for the audience aged approximately between 18 and 35, if we consider this particular program."

"If we take, let's say, informational news or programs, then the situation here seems a bit difficult. If the news is high-profile, it can be watched by a 60-year-old person and a 25-year-old young man. If it is some kind of content about cuisine and cooking, then of course it is popular among housewives aged 23 and 33, or so."

Thus, the differences in media preferences between language groups, regions and age categories of the population of Kazakhstan are multidimensional and affect a number of aspects.

1.8.2.3. TV Broadcast Prospects in This Age of Internet

Experts unanimously emphasize that in a time of rapid development of digital technologies, the role of television, which remains important, especially among older generations, cannot be diminished. The following main aspects are emphasized:

Preservation of TV broadcast for older generations. Experts note that television remains an important source of information for older people. According to experts' estimates, people over 50-60 years old can be characterized as "focused" on television, which is the main channel for them to receive information and news. That is particularly in evidence in the regions, where there is less diversity of media sources compared to large cities. Experts are sure that the reason for this commitment is greater credibility by the older generation to TV broadcast rather than to Internet sources; representatives of older age groups treat the Internet with a certain degree of skepticism and distrust.

“For a certain age group, namely the older generation, television will still be popular. The older generation thinks people write and publish stuff on the Internet, you can't trust it, and they’ll continue to watch TV.”

“Popularity of television is declining as the age composition changes. People 40 plus years old, especially over 50 and 60 years old, they are focused only on television. It especially has its effect in the regions with a limited choice of content, and TV is still a primary source of information for them."

Limited internet availability in remote areas. In areas with insufficient Internet infrastructure, such as rural and remote areas, where high-speed Internet penetration is still difficult for a number of reasons (economic, geographical, technological), TV broadcast remains the main source of information. Development of the Internet and increasing its accessibility for regional residents is a key factor that will determine the future dynamics of the ratio of TV and Internet audiences.

“I would not be in a hurry to say that television will die in the near future or is dying in our country. For the reason that, based on our territory of Kazakhstan, which ranks 9th in the world, taking into account the fact that we still have the Internet of poor quality, and in some places one can't install Internet towers for various reasons such as money, landscape, and all that, we have always had television and will have it in Kazakhstan for a very long time. However, as for the cities where 4G and 5G are being introduced, I`d say ‘yes’, there may be a shift towards social networks, without question. But since in Kazakhstan the majority of the population lives in villages, television will surely enjoy prestige.”

Government Control over Television. In the course of the discussion, there was expressed an opinion that state authorities are interested in preserving television as a tool for influencing public opinion and ensuring information security. Compared to the decentralized and difficult-to-control Internet, television provides greater opportunities to regulate information flows and promote desired narratives through controlled TV channels. Moreover, television is considered as a more sustainable channel for disseminating information in crisis situations where access to the Internet may be limited. For example, in case of force majeure, television has still the ability to broadcast big news to the public.

“Before the tragic events of "Kantar" occurred, everyone thought the same way, that the Internet is the future, television is losing its popularity. But as "Kantar" showed, when we were cut off from the whole world for a week, only 2-3 TV channels operated, including the TV channel "Almaty", the whole Kazakhstan became convinced that the Internet is not the only moment. The Internet was completely cut off. As we see now, in conditions of geopolitical situation, what is going on between Russia and Ukraine, one understands that somewhere the Internet is cut off; somewhere they start to conduct propaganda through television. Therefore, it all depends on the country itself and the policy it pursues. I read an article about the abovementioned issue, it was very interesting; I think even in the UK they raised once the question and said: "Why do we need television? Why allocate billions to it? Why are we doing this if we can do it all through social media?" However, in Parliament, the majority were in favor of traditional television, because it is safer, it is controlled by the government after all, and there's some kind of ‘all-seeing eye’ there. If we hand everything over to the Internet, you understand that via the Internet one can rise any coup, any revolution, any uprising, one can manipulate public opinion, one can get bloggers involved, one can either promote someone or even destroy him/her. We are now passing laws on blogging, introducing taxes and so on – again, in order to take some control over this big virtual world.”

Thus, despite the rapid development of the Internet and other digital technologies, it is a little too soon to write off television, which retains certain advantages and niches in the media space of modern Kazakhstan.

1.8.2.4. Language Preferences of Citizens in Media

In Kazakhstan's media space, according to experts, there is a dynamic change in language preferences caused by demographic factors and a variety of media platforms. Let us consider the general trends and key ideas of the experts.

Growing share of the Kazakh language in media consumption, especially on television, due to demographic factors. According to experts, in recent years there has been a clear tendency to increase the share of the Kazakh language in media consumption of the population of Kazakhstan. This trend is clearly seen on television, where a number of leading channels have completely switched to broadcasting in the Kazakh language, achieving high ratings. According to experts, back in 1991 the share of the Kazakh-speaking population was about 30%, while nowadays this figure reaches 70-80%. This significant growth is primarily due to demographic factors, i.e. natural increase of the Kazakh ethnic group and the growing number of children studying in Kazakh-language schools. Accordingly, a large audience interested in consuming media content in their native language is being formed. This, according to experts, is the reason for the rapid growth of the Kazakh-language broadcasting, especially on television.

"If we compare statistics, then one can say that since 1991 the population of Kazakhstan has grown significantly and, naturally, the Kazakh language is being propagandized. If formerly there were 30 percent of the Kazakh-speaking population and 70 percent of Russian, now everything is exactly the opposite, i.e. somewhere 70-80 Kazakh- and only 20-25 Russian-speaking population. However, this is because we have a lot of people living in villages where they speak mainly Kazakh. Therefore, most of our content is in the Kazakh language, because people watch it, the Kazakh-speaking population is growing. There are also some channels that broadcast only in Kazakh, despite the fact that there is a law that states that it should be 50/50."

"For the last 10 years, the largest TV channel in Kazakhstan, national "Kazakhstan", broadcasts only in Kazakh; there is not a single Russian program, they make news only in Kazakh, translate movies, and so on. It should be noted, that it is the top-rated TV channel in Kazakhstan. It broadcasts different shows. I cannot say that this is changing because this TV channel started broadcasting only in Kazakh, and people are forced to watch it, it is just that demographic factors play also their role here. The number of the Kazakh-speaking population is growing and the number of children who go to Kazakh schools is also growing. So it happens by itself, i.e. no one influences the language policy of the editorial office as much as supply and demand; the market makes these changes."

Preservation of the significant role of the Russian language. Despite the tendency noted by experts to strengthen the position of the Kazakh language in the national media space, the role and importance of the Russian language remains very high. According to experts, many influential media outlets in Kazakhstan continue to actively use the Russian language in their publications and broadcasts. For example, on TV there is still a practice of duplicating news and analytical programs in Kazakh and Russian. Experts explain the preservation of the Russian language by the fact that a significant part of Kazakhstan's population remains bilingual and consumes information in both Kazakh and Russian.

"The TV channel Kazakhstan is the only one broadcasting entirely in Kazakh, but other channels, for example, give news first in Kazakh, then in Russian. I have noticed that people first turn on the news, for example, on Channel 31 in Kazakh, and then they switch to Eurasia or KTK. All the channels have the same prime time, they are all on air at 20:00 or 20:30; so, people first watch some news in Kazakh, then they switch to another channel and watch the news in Russian.

Bilingualism of a significant part of the audience (bilingualism). During the discussion, it was noted that a significant role in Kazakhstan's media landscape is played by a bilingual audience that consumes content in both Kazakh and Russian. According to experts' estimates, the share of such audience is at least half of the country's population. Bilingualism is peculiar to both Kazakh and other ethnic groups. The phenomenon of bilingualism is stipulated by historical factors of the language policy and ethnic composition of Kazakhstan. Knowledge of Russian retains high importance in public life and professional environment. The presence of a significant bilingual audience determines the popularity of creating media content in two languages in parallel.

“There are a lot of Kazakh-speaking people who really don't know Russian well, but they still consume the Russian-language content. They still watch TV in two languages or in Russian; for example, there may be some information interesting for them but not translated, let's say, into Kazakh, some international information, then it is obtained on Russian-language resources, they consume it from there too.”

Differences in language preferences by media type and content. According to experts, language preferences of the audience in Kazakhstan largely depend on the type of media and the content nature. Thus, the leading positions on TV are occupied by the Kazakh language, especially in entertainment programs and shows. At the same time, in the Internet space, the role of the Russian language is more noticeable. Experts note that this difference is due to peculiarities of the audience of different media platforms. Television viewers are more often representatives of older ages, rural areas, who prefer to consume in the Kazakh language. The Internet audience is younger, urban and more Russified. In addition, the language component differs for different types of content. For example, news and analytics are more likely to be presented in both languages, while entertainment content may target a specific language audience.

“As for websites, over the last 2-3 years we have, of course, increased the content in Kazakh, but there is still more Russian-speaking audience in the Internet; I will not argue this point. However, as for television, the Kazakh audience will prevail here in any case. I would like to repeat again that in villages where there is no Internet connection, people watch TV for sure, because there are towers and cable TV, so they watch TV. Now we have 25 TV channels, and 5-6 among them can give more Russian content, the remaining 15 will give more in Kazakh. Here again, everything depends on the content submitted.”

Thus, Kazakhstan has seen a marked increase in share of the Kazakh language in media consumption, especially on television, due to demographic factors. This trend is due to the high growth of the Kazakh population and increase in the number of children studying in the Kazakh language. However, the Russian language remains significant, as many media outlets continue to actively use it in their publications and programs/shows. Bilingualism plays an important role as a great part of the population consumes content in both languages. Differences in language preferences depend on the type of media and content nature, with Kazakh predominating on television and Russian on the Internet.

1.8.2.5. Preferences in Choosing News Sources and Analytical Programs

According to experts, domestic media occupy a priority position among the audience, being considered the main and authoritative source of information about the life of society. At the same time, the Russian media, especially TV channels, have a significant influence, attracting the attention mainly of older and middle age groups. Let us consider general trends and key ideas of the experts:

Priority of domestic media. The shared vision of the expert community is that the domestic media enjoys absolute priority among the audience in terms of consumption of news and analytical content. Experts place particular emphasis upon popularity of national and republican TV channels, as well as other big media outlets specializing in news and analysis of events in the country. Despite the availability of external media, Kazakhstani media are the main and most authoritative source of information about the life of society for the audience.

"We, Kazakh people, are not so patriotic, but we are always interested in what is going on in our country. We are not Europeans, Englishmen or Americans to be interested in what is happening in Russia. First of all, I would say that we are interested in what is happening in our country, beyond all doubt. Then, of course, in the last year and a half we follow the news about Ukraine and Russia. So I think that the first place among news agenda is Kazakhstan, second CIS, and 3rd-4th place is the world and so on."

"Our population also watches analytical problems; KTK broadcasts them. They watched at the republican level. Local TV channels are very weak, they have turned into a press service of local akimats. They have a very weak editorial team. Therefore, people prefer to watch major TV channels such as KTK, Eurasia Channel, Channel 31.”*

** akimat is a local executive body*

Positions of Russian media, namely TV channels. Despite the priority of domestic media and certain skepticism of the audience towards media, the Russian media continue to play a very prominent role in Kazakhstan's media landscape. This is particularly so with influential Russian TV channels, such as Channel One, NTV, STS and others, which occupy a significant share in the TV viewing structure of Kazakhstanis. According to experts' estimates, the most active audience of Russian TV channels is older and middle-aged people, for whom watching Russian TV is in many ways already a stable habit. In addition, Russian channels are often included in the basic packages of cable TV operators, which also expands their coverage.

“Republican and Kazakh TV channel are popular. Russian TV channels are also popular but I’d like to mention here that they exist by default, i.e. they are included in the bundles as standard. The most popular TV channels are Russia-1, NTV, STS.”

Regional difference. Experts identified significant regional differences in media preferences and types of media content as an important factor. It is emphasized that in the north and east of Kazakhstan there is a higher popularity of the Russian media compared to the southern and western regions of the country. In particular, the position of Russian television and other Russian media is stronger in the regions bordering Russia. While in the south and west, the Kazakh media are more preferred. This situation is due to proximity to the Russian media market, features of the ethnic composition of the population of border areas, as well as historical and cultural factors.

"It depends on the regions, especially the northern and eastern regions, where the percentage of those who watch Russian television is even higher. We have a mixed picture by regions. For example, in Turkestan region and in East Kazakhstan region there will be very different indicators. Let us say that in Turkestan the Kazakh-speaking audience will make 80% of consumption, but in East Kazakhstan will be no more than 10%. It is not quite correct to give this figure for Kazakhstan as a whole. It seems to me that it is necessary to give information at regional level. Because we, as well as authorities and commercial companies have illusion that we all know the market as a whole in Kazakhstan, but it is not so. It depends very much on the regions, where one can find significant differences."
"In the North of Kazakhstan, Russian TV channels are very popular. In the Southern and Western regions there is no such influence."

Influence of audience age. Along with regional specifics, the age composition of the audience plays an important role in determining the audience's media preferences. According to experts, the older the age group, the more it tends to favor the Russian media, especially television channels, and vice versa - the younger the audience, the more it prefers the Kazakh media, mainly in the Kazakh language. Thus, while in the older age group (50 years and older) Russian television is the most popular, young and middle-aged people more often choose Kazakh-language TV channels and other domestic media.

“One of the important factors in this issue is age, because main viewers of Russian channels are people over 50. They watch television, and Russian television for them is a habit, including as well many other factors. Younger people prefer Kazakh-language TV programs. The percentage depends on the age of the population.”

1.8.2.6. Top 5 Preferred TV Channels

In the context of preferred TV channels in Kazakhstan there are five leading TV channels that attract the attention of a diverse audience:

Leadership of national channels “Kazakhstan” and “Eurasia”. According to expert consensus, these TV channels are the absolute leaders in terms of audience and influence among TV viewers of Kazakhstan. There is an active competition between two national broadcasters for the title *Number One* – the first place in the ratings. Among the factors that determine the leadership of these channels are their large-scale coverage of the audience throughout the country, strong network of branches and correspondents, as well as provision of popular entertainment and information content to viewers. Popularity of the television channel “Kazakhstan” is ensured by the function of the main national broadcaster, broadcasting of the main news and social and political shows. High ratings of the TV channel Eurasia[3] are due to broadcast of scandalous and hard-hitting news, as well as popular entertainment shows.

"According to the network analysis we check every week, the 1st place takes Kazakhstan or Eurasia, they are constantly in hot pursuit with each other, put it in this way. KTK takes the third place and Channel 31 runs the forth."

"Eurasia is also considered as top-rated due to the program called Kalaulym, a youth program where people get to know each other. It is on air for three hours and people watch it. There was no such rating program in the history of Kazakhstan at all. Even the President intervened two or one year ago that this program should be closed because, according to Kazakhstani people, it is supposed to be against our national values, but this program continues to exist because it is of great interest for advertisers and TV channels that earn money only on advertising. Due to this, the Eurasia TV channel is very popular in Kazakhstan."

Highly ranked *KTK* TV channel. Experts note that KTK is among the top three highly ranked channels along with leading national TV channels. However, the general opinion is that KTK is ahead of such channels as Channel 31 and Khabar. Experts also point that high ratings of this entertainment channel are due to the broadcast of popular TV series, shows, and various programs for family viewing.

"According to the network analysis, KTK took the 1st place a couple of times, but lately it is not on the 1st place. Eurasia has the first place in the rating list. One can see it clearly based on the data, such as share of views and so on. Next comes Kazakhstan, then Channel 31 and KTK, and Khabar has not now the 3rd place, but the 6th or 7th in the rating".

Popularity of Channel 31. Channel 31 is popular with the audience and is among the top five leading TV channels in Kazakhstan. For example, during the interview it was noted that Channel 31 demonstrates high rating indicators along with such channels as KTK, Channel One Eurasia, Eurasia and Kazakhstan. According to experts, Channel 31 is ahead of a number of other national channels, including Khabar, in terms of popularity.

Discrepancies in the assessment of Khabar channel's position. Based on the interviews conducted, it can be noted that there are conflicting opinions of experts regarding the popularity level and position in ratings of Khabar TV channel. In particular, one of the experts expressed doubt that this channel occupies the positions stated in the research, noting that its ratings have been significantly declining in recent years. According to the opinion of this expert, the position of Khabar TV channel in the presented popularity rating is exaggerated. At the same time, another expert, on the contrary, assessed Khabar's position as underestimated, pointing out that this channel demonstrates high rating indicators and is at least in the top five in the list. Thus, opinions of the experts relating to the level of popularity of Khabar TV channel are divided on this issue. Nevertheless, this information channel attracts the audience with its prompt coverage of events in the republic and emphasis on regional news

"Kazakhstan and Khabar 24 are only the news channel. They broadcast different programs but mainly focus on news. TV channel operates 24 hours and presents top Kazakh news".

"Our TV channels, Kazakhstan and Khabar are everywhere available, and have their strong positions due to the wide coverage".
"On the whole, I have considerable doubts relating to Khabar; the fact of the matter is that this channel is affiliated with Gallup, and the latter promotes Khabar. Throughout recent years, the rating of Khabar is considerably decreasing. I do not believe that Khabar holds this position."

In general, experts agree that the leading positions among TV channels take Kazakhstan, Eurasia, KTK, Channel 31 and Khabar. Popularity of the mentioned TV channels is based on their well-defined positioning and format, as well as the audience's preferences in entertainment and information content. At the same time, there are discrepancies in assessments of ratings of certain channels. For a more accurate picture, it is necessary to take into account data from different sources of TV viewing: cable, satellite, IP-TV.

“As a result we have got the following: Kazakhstan, Khabar 24, Channel 31, Eurasia and KTK are the top 5 popular TV channels.”

1.8.2.7. Assessment of the necessity to control the foreign media broadcasting in Kazakhstan

Role and influence of Russian and Western media in Kazakhstan's information space has come up for serious discussions among experts who have expressed concern about influence of the Russian media. The following key ideas can be emphasized:

Necessity to reduce influence of the Russian media. Experts showed common concern about the high degree of presence and influence of the Russian media in Kazakhstan's information space. According to their estimates, more than 200 Russian media outlets, including TV channels, radio stations, and print media, are registered and broadcasting in Kazakhstan. This makes more than half of the registered foreign media in the country.

“Russian TV channels, be radical, should be closed completely. According to the data in Kazakhstan, I did a story about it, more than half of the foreign media registered in Kazakhstan are the Russian media. More than two hundred Russian media outlets broadcast in Kazakhstan, mainly TV channels. Here I talk only about TV channels, without regard to newspapers. I have a list of Russian TV channels sent to us by the Ministry of Information; there is a list only of TV channels. "Argumenty i Fakty" also broadcasts here, excluding newspapers and magazines. And our authorities, unfortunately, are very weak in checking and monitoring the content in Russian TV channels.”

"And another thing, the Kazakh authorities do not really and reluctantly control Russian content, because they are not influential enough in this respect. The Ministry of Information cannot shut down their TV channels on a unilateral basis because it is in the hands of private operators which provide services, and they decide for themselves which channels to add to the bundle/package and which not to add. They simply send warnings to the operators, and the operators, in their turn, send warnings to the TV channels. However, who believes that these TV channels will reduce content on war propaganda or that they will create content for Kazakhstani audience knowingly. So we need to control the Russian content."

Wide ranging availability of Russian TV channels such as Channel One, Russia-1, NTV, REN TV, and other is of great concern. These channels are broadcasted by major TV operators of Kazakhstan and are of high demand with the audience.

"There is a local operator in Karaganda, Remstroyservis, and when Russia invaded Ukraine, they closed all Russian channels and switched on The Khabar 24. The locals at that time started looking for NTV, Russia-1, Russia-2, Russia Today, all these TV channels were closed, so they switched on the Kazakh TV channel Khabar 24 instead. The whole Kazakhstan just watched how the Kazakhstani authorities and this operator would act. This operator showed courage, but that same evening after a mass complaint from residents, they have returned to the Russian TV channels. This is evident from the fact that the Russian channels have become the main source of information for many residents, both Russian-speaking and Kazakhs. We need to eradicate this. It should also be noted that our authorities act based on complaints of the Kazakhstanis. That is, they cannot act themselves, they act when there is a complaint from some citizens."

"When we asked the Minister of Information: “Well, if you act this way, how many complaints have been received about the Russian TV channels?” “Not a single complaint”. That is, their hands, I mean the authorities of Kazakhstan, are tied. With due regard to the law, the order of work is that local or large republican operators buy Russian channels, they include them in the package, people buy it, the Ministry of Information cannot interfere in it. So, the first reason is the order of work, and the second is influence of Russia and the Kremlin. The authorities of Kazakhstan are still pretty dependent on the Kremlin."

According to experts, the Russian media have a serious influence on public moods, especially in the northern regions of the country and among the Russian-speaking population. Their content is quite often propagandistic and disseminates the information that does not correspond to interests of Kazakhstan.

"Separatism is increasing in our Northern regions due to different TV channels broadcasting about Russia and war. Therefore, local Russian residents think that Kazakhstan has also something to do with it. It happens in Almaty and in other districts. Local activists struggle with this, for example, they stop cars with the sign Z. People come from the North or Russia; they still have this Z sign on their cars. That is, they live in such a vacuum, created by Russian TV channels and Russian sources of information."

In this regard, experts insist on the necessity to significantly reduce the presence and influence of the Russian media, proposing various measures, from a complete ban on broadcasting to a partial restriction of broadcasting of political and analytical programs, as well through legislative regulation and content monitoring.

"Of course I would like to reduce the influence of the Russian media. I do not know if is possible or not. If they could legislate at least to limit political content. Entertainment content is consumed by people, and in the meantime the propaganda content exists too."

It is also proposed to impose stricter rules on Russian content monitoring, including with the involvement of independent experts, and to strengthen the responsibility for violation of the legislation with regard to prohibition of war propaganda.

Referring to the demands of citizens, it would be possible to limit or strengthen the requirements for the Russian content, that is, to form a team in the Ministry of Information, so that there are independent experts too, not only state bodies. So that they do a survey, research, content analysis with respect to how their programs generally affect local residents, and based on this to draw conclusions, for example, close this channel if there are many facts that violate the laws of Kazakhstan. In our country, the war propaganda is prohibited. Therefore, referring to this law, they can easily close or limit broadcasting time, or set some requirements, or carry out strict control."

According to experts, the main goal is to ensure information security of Kazakhstan and counteract undesirable external influence. Consequently, it is necessary to essentially reduce presence of the Russian media in Kazakhstan's media space in order to protect the country's information sovereignty.

"I agree that there is a thin partition with censorship. I am afraid of any influence or any interference of the state in the information policy of Kazakhstan. I believe that the state should not interfere in it at all, but there is a question of national security. They must therefore get involved in it to protect our national interests and our national security. Therefore, it is necessary that people, human rights defenders, whom people of Kazakhstan trust, say as follows: "This TV channel contradicts our national interests, threatens our national security. Therefore we either forbid this operator to broadcast, or request to remove it from the bundle". It means to take tougher measures."

Alongside with that, according to experts, the imposition of strict prohibitions on the Russian media is complicated due to political and economic factors. Kazakhstan has to reckon with the Russia's position as an important political and economic partner. Despite the understanding of the necessity to regulate the Russian media presence, experts admit the presence of external restrictions for the implementation of this issue.

"Speaking at the government level, it is clear that, based on the statements made by the Presidents of our countries, this will not go far. They have partnerships, good-neighbor relations, lots of contracts. Accordingly, it is not worth mentioning the fact that Kazakhstan may suddenly take some strict measures against the Russian media. At one time, this issue was

raised, especially after the events in Ukraine, that it is necessary to ban Russian channels or somehow reduce them in our space, but this did not happen. It is clear why it did not happen, because there are certain agreements. I think that Russian TV channels have been available and will be further. As for the attitude of the government, personally, I do not believe that in the near future or years some radical decisions will be made regarding Russian TV channels, because there are some tools of diplomacy and they will surely be used."

Proposals to partially replace Russian content with Kazakh. There were specific ideas on how to partially limit the broadcast of Russian content by replacing it with local Kazakh content. In particular, a proposal was made with regard to Russian TV channels broadcasting in Kazakhstan to replace Russian information and analytical programs covering the political agenda with alternative programs of Kazakh production. According to experts, this partial replacement will reduce impact of the Russian propaganda agenda on the Kazakh audience. At the same time, the entertainment content of Russian channels can be preserved, as it is in demand among the population. As a positive example of implementation of this approach, experts cited the "Channel One Eurasia", where Russian news were replaced by Kazakh.

"I'd appreciate it, if it were possible to limit or replace some Russian political shows for local ones. We had such a plan relating to the Channel One Eurasia, and it was implemented, i.e. it broadcasts now Kazakh news. If only we could do it, then the country would only benefit from it. As for Russian entertainment and cultural content, movies and other that attracts the viewer to television, I have nothing against it."

Thus, according to experts, implementation of such measures will make it possible to more strictly regulate the Russian presence, without using a complete ban on channels, but reducing the destructive influence of propaganda content.

In**fluence of public opinion on Russian media after the events in Ukraine.** Events in Ukraine and Russia's position on this issue have led to significant changes in public sentiments in Kazakhstan. According to experts, after the outbreak of hostilities, the rejection of Russian media and their content among the Kazakh audience increased sharply. People began to have less credibility to Russian channels and switch to local sources of information.

The experts also note the public outcry against the Russian media in the form of particular acts: for example, cancellation of concerts of Russian artists, as well as active participation in petitioning relating to shutdown the Russian TV channels broadcasting. In their view, this trend will only be reinforced, which may lead to a further decline in the influence and popularity of Russian media in Kazakhstan.

"I think it is necessary to take the media influence of Russia into our hands. Last year there was a petition demanding to close Russian TV channels. There were about 10,000 signatures. But the site where the petition was published is unofficial, that is why the authorities do not consider this petition."

"Taking into account the position of the public, I think you have recently seen the cancellations of concerts of Russian stars, I believe that people will be more interested in Kazakh TV channels, even given the fact that we do not have as much content as Russian channels have."

Necessity to increase the presence of Western media. Mutual opinion was stated that there is a distinct lack of quality western sources of information in Kazakhstan's media space. Experts noted the weak involvement of the audience in consumption of media such as BBC, Deutsche Welle, Euronews and others. According to them, Western media could be an alternative to both Russian and local Kazakh media. They are characterized by higher standards of journalism, well-balanced coverage of events and professionalism. In this regard, experts believe that expanding the presence and coverage of Western media would be in the interests of Kazakhstan. This would diversify the media landscape and reduce dependence on Russian information influence. According to expert opinion, implementation of this task requires both the development of the Russian-language subdivisions of Western media and the increase of media literacy in Kazakhstan.

"In our country the habit to read the media reporting even local news is poor developed, for example, BBC Russian Service. I`d like to mention here that BBC has Russian service, and a separate service for Central Asia does not exist. It seems to me that the request for such media as Deutsche Welle, the BBC, which have history and background, is not so easy. For the reason that those media that have good positions here, such as Azattyq radio, they are sometimes still more biased than, for example, the BBC. I would like to increase the presence of Euronews, the BBC and Deutsche Welle, which already have Russian-language editions; I would like also to see that media have more focus on regions."

1.8.3. Internet and Social Networks

1.8.3.1. Internet in Kazakhstan: accessibility, quality, costs

In terms of importance of the Internet in today`s society and its impact on Kazakhstan's information space, there are several key aspects raised by experts. These aspects include high level of Internet penetration within the country, insufficient quality of Internet services, relatively low prices of Internet services, as well as use of the Internet by authorities as a tool of control and management in the society. Let us consider each of these aspects in more detail.

High level of Internet penetration according to official data (up to 95% of the population). Experts referred to official statistics, according to which the level of Internet penetration in Kazakhstan reaches 94-95% in cities and rural areas. Such data are cited by both government agencies and international organizations.

“According to the International Telecommunication Union, I don't know what kind of organization is this, they say that in general 94% of rural areas and 95% of urban areas in Kazakhstan are provided with Internet. Our official media refer to this organization.”

Experts also note that there are available government programs to expand Internet access, which include installation of equipment and antennas to provide coverage in rural communities.

“There are various government programs where the government cooperates with operators, funding them to provide the Internet where the population exceeds 250 people. Such programs are available. That is, they install some towers, antennas, say that 'The Internet is provided here', and go to the next village. That is how the Internet is provided.”

Insufficient quality of Internet services. According to experts, despite formally high penetration rates, actual quality of the Internet connection in Kazakhstan often does not meet the stated level. In particular, it was noted that the speed of mobile Internet is often very slow, the connection is insecure and often interrupted. At the same time, communication quality has not improved even over the past few years, despite the introduction of new technologies such as 5G. Experts associate this with the fact that the state-owned telecommunications giant Kazakhtelecom, after acquiring Kcell and Tele-2, has largely monopolized the telecommunications market. This led to a decrease in competition in the industry, which could affect motivation of companies to improve the quality of their services.

"The problem is that in recent years the quality is lowering, I am myself, as a user, see it, the quality of service provision is low, without prejudice. Because the competition between players has decreased, and the Kazakhtelecom has actually a monopoly after the acquisition of Kcell and Tele-2. There are no competitive conditions at the market; communication quality is lowering. The price is acceptable and affordable for almost everyone. The Internet is really well distributed, but there are issues about the quality of service, because our communication quality, particularly mobile Internet, is far behind many countries."

"Quality of the Internet is very poor. They say that soon Kazakhstan will have 5G, but the quality of 5G is not different from 3G or 4G, that is, you cannot feel the difference. The telling point could be for example, coronavirus pandemic, although it was only two years ago, and in those two years I can't say that anything has changed dramatically."

"There is a large operator Kazakhtelecom, we pay for it despite the poor quality; the Beeline also disconnects the Internet often, there are complaints, but it did not affect the price at all. That is, people pay the same price despite the quality of the Internet."

"As for the Kazakhtelecom, the situation is a bit different. They sell packages, ask an exorbitant price, conclude some strange contracts; people always complain about them, they are constantly dissatisfied. Everyone says that the amount paid for his/her Internet services does not correspond to the quality. Therefore, generally speaking, our Internet is inexpensive, and

for such a price, we get the corresponding quality. If you go 60 kilometers away from the city, you get either 3G or E, with no internet connection at all."

Internet services in rural areas are often unsuitable for full use, as well as for online learning or business and media development. Experts provided examples where people have to climb onto rooftops or go to neighboring villages to access the Internet. Consequently, experts noted that there is a serious problem of poor quality of Internet services in rural areas of Kazakhstan and it has to be solved by sectoral authorities and telecommunication companies.

"We have a problem in villages rather than anywhere else, where the Internet is a major issue. It should be mentioned that there lives more population than in urban areas. Accordingly, if they invested money and install the towers, I think it would pay off. A person can stay without a car, without taxis and buses, he can walk, but he will pay for the Internet as much as he/she has to."

"A lot of videos went online where kids sat on the roofs in rural areas trying to join a Zoom class. They were really on the roofs and/or went to neighboring villages to get Internet access. Teachers, to fill out online electronic grade record book, went to other villages at night. There were some sensational videos about it, and there are a lot of them. All these facts may be an indication that the quality of the internet is different from what we are told in the official media."

"People really get a lot of content by means of their cell phones now. It is good for the media and for business because we are all moving online now. I, for example, prepare some content only online and it is designed for social media. I see and believe that it is perspective now and it will be so further. The only thing that slows me is communication quality. I cannot make video content with good quality, or with a good picture, because many people simply cannot download it. This can be especially seen in the hinterlands. For example, Kazakh-language content which is widely consumed in Kyzylorda and Turkestan regions, people there are not able to watch such video content in the Kazakh language because of the poor Internet quality. This is also a state problem, because if we emphasize development of the Kazakh language, it should be done through development of the Internet too, but this is not done.

Relatively low prices of Internet services. There was a general opinion that compared to other countries, prices of Internet services in Kazakhstan are less than overstated. Experts note that tariffs are quite affordable for the majority of the population. In particular, such arguments as the ability to purchase small packages of Internet traffic at a relatively low price were made. In general, the affordability of the Internet in Kazakhstan was assessed by experts as acceptable and low compared to other countries.

"I won't complain about Internet costs in our country, because when I was in Europe, Internet costs were very expensive there. I suppose that the situations is like that because the standard of living in Kazakhstan is lower than in Europe, for example. Maybe for people in Europe their prices are quite adequate. But when I returned to Kazakhstan, I understand that the price corresponds to the quality here."

"I wouldn't say that our internet costs are expensive. Whatever people say, but in my opinion it is not expensive at all. One can buy such a device paying monthly 6,000 tenge (six thousand KZT), and then can watch cartoons and movies without any problems; actually, the device is not expensive."

"The prices are surely not overestimated, they are really quite low."

Use of the Internet by authorities as a tool of control and management, including shutdowns during protests. Experts expressed general concern that the state is actively using the Internet as a tool to influence public opinion and suppress dissent. In particular, one can give examples of Internet access blocking during opposition rallies and protests. According to experts, the authorities resort to disconnecting the mobile Internet and installing jamming stations in places where protesters gather. Experts call such actions a manifestation of Internet censorship and a means of creating an information vacuum in the period when authorities need it. This allows manipulating the public opinion and hinders citizens' access to alternative information. Consequently, according to experts, the state actively uses technical and administrative levers to control the Internet for political ends.

"According to Freedom on the Net, which studies freedom on the Internet, we have a tendency in Kazakhstan to frequently restrict access to ISP during rallies and political events. They simply cut off the internet when they need it and give access again when they need it. During the "January Events" there was no internet access for almost a week. People did not have access to the Internet; the media did not have access to the Internet either. Only those media that are in the hands of the authorities had access, as well as those media that have other foreign providers, not Kazakh, maybe they broadcasted. They became the only sources of information, and then the propaganda was in full flow."

"The Internet is also used as a tool of control. The media in Kazakhstan are very vulnerable because the Internet is also in the hands of the authorities, they can shut it down at any time. For example, our office is in Nurly Tau, Al-Farabi/Dostyk Avenue in Almaty, and not far from us there is the Akimat (administration); and when a lot of people gather there, the Internet is cut off, and we can't broadcast the event because there's no internet connection. The Internet is under the complete control. The locals are suffering from this as well. I would like to give more examples: you walked around with a microphone and the Life View equipment, we wanted to broadcast live at a rally, but it was not possible; or people went into a coffee shop or somewhere could not make phone payments. That is, they disconnect the Internet selectively and install some kind of internet jammers. And until the last person has left the square, they did not give access to the Internet. The connection becomes very weak."

1.8.3.2. Willingness to Pay for the Author`s Content

The situation with media content and its monetization in Kazakhstan keeps the matter unsettled. At the moment, the majority of the population prefers free content and is not ready to pay for access to information and entertainment materials. Let us consider this issue in more detail.

The majority of the population is not ready to pay for media content. The vast majority of the population of Kazakhstan is not ready to pay for access to media content, such as TV programs, articles, videos and other materials. Experts note that the share of those who make paid subscriptions to media or buy access to audiovisual content remains insignificant. According to various estimates, it is 1-5% of the total audience, so the transition to paid content consumption pattern is still at the initial stage. At the same time, most people prefer free content, even if it is accompanied by intrusive advertising. According to experts, content monetization at the expense of the audience is currently underdeveloped due to low paying capacity and the population's unwillingness to pay for information.

"I think the percentage of those who are willing to pay for content is extremely low, because with regard to recent realities and events, as well as inflation, I think people will just consume what they have. As for extra payments, only those who can afford it, will be ready to pay for the content, probably up to 5% of the population."

However, experts believe that in the future, the situation may change. As citizens' wealth and digital literacy grow, some part of the audience will be able to move to paid subscriptions and purchase access to content. However, this is just a "what-if scenario".

"Nonetheless, we should try to further develop this branch, because in the foreseeable future this tendency will come anyway. Once people did not use bankcards, but in a short period of time, almost in 5 years, they learned and get used to using them. The same will take place with paid content too, some kind of breakthrough will still happen."

"The situation is gradually changing, people move to paid subscriptions, but from the total population it is only about 1-2% of those who are willing to pay for products and subscriptions."

The media have to rely on state funding and advertising revenues rather than on the audience. In the light of this, Kazakhstan's media have to rely primarily on state funding and advertising revenues for their financing. Experts note that due to weak paying capacity of the audience, media revenues from the sale of content are insufficient to cover the costs of producing quality content and maintaining staff. In this regard, media outlets are focused on obtaining budget financing in by means of government orders, tenders, and subsidies. Attracting advertising budgets also plays an important role. However, such dependence on the government and advertisers limits the independence and freedom of editorial policy of the media, according to experts. They believe that the ideal model would be to receive revenues solely from the audience.

"TV channels and journalists are afraid of losing state orders and tenders, because people are not ready to pay for public TV channels and independent media. If the government stops financing, for example, they will not place million-tenge tenders or state orders, then these media outlets will cease to exist. These media outlets will not be able to exist on advertising money, because it is very little; they employ about a hundred or a thousand people, and it is impossible to ensure their salaries with advertising solely. In an ideal scenario, I would like to see no state orders, so that the media would depend only on the audience."

There are examples of attempts to put up a paywall, but they did not bring substantial revenues. Experts cited examples of individual attempts by Kazakh media to introduce paid subscriptions and paid access to some content. However, these attempts have not yet brought substantial profits to the media and have not replaced their traditional sources of income in the form of advertising and government funding. For example, an attempt was made by one of the independent publishing houses to move to paid subscriptions and introduce “donations” to monetize materials. However, this model provides only a humble income from a small part of the loyal audience willing to pay for the content. Another example is introduction of payment for access to TV and movies, which has also failed to generate significant revenues, as the audience prefers free content. Thus, attempts with paid content have not yet given the Kazakh media a stable source of income from the audience, which confirms the low paying capacity of the population at this point.

"I think that the majority is not yet ready to pay for digital content. I had such an experience when I worked at the Kazakhfilm. We tried to sell movies at rock-bottom prices, but people did not want to buy them. A person prefers to watch free content with a lot of advertising, but he/she won't pay because our people are not used to it yet."

"We had such a case with an independent magazine in Kazakhstan, the Vlast KZ. They do not obtain bids and have an independent rotation policy. They are considered to be an opposition, but they are not. They moved to subscriptions, i.e. they started selling some articles, long-reads, videos to their readers for "donations". Of course, they receive some money but it is still not sufficient to operate well. Only the people who want to support this media are ready to pay for subscriptions. And friends send to each other, some kind of supporting this media in such a way. But there is no such habit to subscribe for some media, like the New York Times or Bloomberg, and read it in the morning."

1.8.3.3. Top 5 Internet Products for Which Users are Willing to Pay

Despite the fact that the vast majority of Kazakhstan's population is not ready to pay for media content, it is still interesting to consider the group of those who are ready to or could move to paid content consumption patterns in the future. Let us analyze this dynamics more thoroughly.

Streaming services are in the greatest demand. Experts expressed the general opinion that the most in-demand and popular paid online products in Kazakhstan are services that provide access to video content, namely movies, TV series, cartoons. In particular, streaming service platforms were mentioned, allowing to watch movies and TV shows by subscription. According to experts, this is due to the fact that video content is the most attractive and desirable type of digital content for the audience. People would be willing to pay for the opportunity to conveniently watch movies and TV series online, especially exclusive new releases.

"I would like to give you an example. If a good, top, foreign, Hollywood movie is released, let us say, "Fast and Furious", then the Russian-speaking audience would probably pay for it. As for the Kazakh-speaking audience, I believe they would rather pay for "QosLike", there is no doubt about it, because they're used to this program, and consequently ready to pay for it."

"I think that in most cases it will be movies, programs like QosLike, cartoons and something like "Dombira kyu", more national content. And as for the Russian audience, they will prefer more movies, fashion, something like that."

"Now there are service providers like Megogo and others that a person subscribes to on a monthly basis. It is doing well, too."

"For example, if a provider closes the most popular programs that are broadcasted in Kazakhstan and declares: “You should pay 1,000 tenge (one thousand KZT) every month, we'll keep working”. I think people would pay for it. These are such programs as "Kalaulym", the program "Bir Bolaiyk", news on the Eurasia TV channel, another “Channel 31” and "Astarly akikat", which KTK broadcasts; there is gossip and coverage of the issues of other people. So, in my opinion, people would pay for the abovementioned programs (as an examplr), the most popular news and shows, where there is no ethics and culture."

Music streaming services and podcasts are also in demand. Along with video streaming services, paid online music streaming services and podcasts are in high demand among the audience in Kazakhstan. Experts note the popularity of services such as “Yandex.Music”, providing access to a large catalog of music for online listening for a subscription. According to experts, this is due to the fact that music is a very attractive content that people listen to everywhere by means of gadgets. They also noted the growing popularity of podcasts on various topics to which listeners can subscribe for a fee. Experts call podcasts a promising and in-demand audio product.

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"If we consider only content, I think music will be in the lead. For example, “Yandex.Music”, all sorts of streaming services like that are popular, because people use it, they listen to it in their cars and in the headphones."

"Podcasts - yes. If something as interesting as Margulan Seisembayev who tells about how to make your first million, why not. As for news, here I'm pleasantly surprised too that people pay for news. Analytics, I think it's a bit exaggerated. Educational programs are also popular, for children, of course. Listening to music and movies - I agree. Games - also. Basically, it all fits together."

Paid subscriptions to mass media and literary content are not popular yet. Experts note that paid subscriptions to online mass media or literary platforms are not widespread enough. Attempts to monetize textual content, for example, through "donations," have not brought the media any sufficient income. According to experts, the majority of the audience is still focused on free content and is not ready to pay for access to texts, articles, and books on the Internet**.**

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"About reading books, I wouldn't be so sure. I think people just wanted to show themselves intelligent when they answered. In Kazakhstan there is a project "Kitap KZ", you can subscribe there too, it costs little, even less than 1,000 tenge (one thousand KZT). However, people don't subscribe there, even though it has the largest database of books in Kazakh. So I don't believe the given statistics."

"And I think people are willing less to pay for content, for intellectual property, for texts/articles."

Experts doubt the reliability of high indicators of interest in audiobooks. Experts have expressed doubts about the reliability of rather high indicators of the audience interest in audiobooks presented in the quantitative data. Experts note that such a marked interest in paid audiobooks goes against their personal experience and observations of the media market in Kazakhstan. In their opinion, audiobooks are not yet widespread.

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"I don't know about audiobooks, it's new for me that people are paying for it. I'm a little surprised about the indicators of willingness to pay for reading books and audiobooks. I just have no experience herewith. I'm a bit confused and so puzzled. Because I've dealt a little bit with literature myself, at least, and I don't know who consumes that."

1.8.4. Credibility to Information Sources

1.8.4.1. Credibility Level to Different Information Channels

Having compared the credibility level to different sources of information, it is worth emphasizing the influence of social networks, television and independent media on public opinion in Kazakhstan.

Growth of influence and credibility to social networks. According to experts, social networks enjoy a high level of credibility among the audience; users often perceive information from social networks as reliable without having to double-check it in other sources. There were examples showing how news from social networks instantly go viral and cause public outcry, even if it later turns out to be fake. In their opinion, this is due to the fact that in social networks the information spreads rapidly and does not pass the editorial control. At the same time, the audience does not always have the media literacy to distinguish truth from fake.

"To my great regret, my experience suggests that that people have more trust in social networks. In our country, people do not even know if something is true or not. Some news appears on social networks, that's it, and it finds resonance. Then, when the official news appears, they start to refute it, and people say like: "Oh, it turns out to be true."

"Credibility to social networks is high, but people don't share information there, they read something on Facebook and so on, there is 50/50 credibility. As for me, I don't trust anyone, I check everything. It's a peculiarity of my profession."

The most popular and influential social networks in Kazakhstan are Facebook, Instagram, YouTube, Telegram and the increasingly popular Tik-Tok.

- In particular, it was noted that Facebook remains one of the most popular social platforms, especially among politically active users.
- Instagram also retains high popularity and influence among different audience groups as a source of entertainment and visual content.
- YouTube has the lead as a channel for videos, both entertainment and educational. Professional and amateur authorial channels are also popular on this platform.
- At the same time, Tik-Tok is gaining popularity among young people thanks to short viral videos.

"Tik-Tok is becoming very popular. But the media don't move to Tik-Tok now, they are doing it slowly, but on Tik-Tok you can't pay to become popular, the algorithms there are completely different. Sometimes I get recommended some TV channel stories, but very rarely. Instagram is still popular, and Facebook, by the way, is very politicized, and also popular."

"Among the Russian-speaking population, it's still Facebook and YouTube, because people watch videos, listen to music on YouTube, and watch TV series on YouTube. Notifications from YouTube come; once you click it and there you go, for example, author channels and so on and so forth."

"Telegram is already growing; I think it will continue to grow in the coming years. Instagram will probably retain its position as just a platform for selling some services. And in terms of the media consumption, Telegram will be steadily running strong."

Television remains an important source of information. Despite the growing popularity of the Internet, television in Kazakhstan remains one of the key sources of information for the audience. According to experts, credibility to television is still high among older people aged 40 years and older.

“Here the age factor is still important. I think that people aged over 40 and 50 trust mainly in television.”

Credibility to news media websites. In Kazakhstan, not only traditional media such as television, but also news websites on the Internet are of high credibility. However, experts note that only those online media that have established themselves as a quality source of information have credibility. We are talking about websites that have been operating in the market for a long time and have a reputation of unbiased and independent media. To such websites experts refer, for example, some Kazakhstani online media outlets specializing in news and analytics. Their materials are considered by the audience as reliable, without need to be double-checked.

"Online media are popular, namely those that promote news through their websites and through social networks. Some official sources of information are more trustworthy, something that does not need to be double-checked, for instance Akorda, or something like that. And some long-established online media like the Tengri News, the Zakon; as a rule, people believe that it has no need of double-check".

Manipulation through new independent media and Telegram channels. According to experts, there is also a tendency in Kazakhstan for the authorities to manipulate public opinion using new independent media and Telegram channels. As experts say, media that position themselves as opposition and independent, but are actually controlled by the authorities, have recently become popular. In particular, we are talking about some Telegram channels and websites that actively broadcast compromising information and criticism of certain politicians while completely ignoring others. According to experts, be this means the authorities try to redirect and manipulate public opinion in the way they want. This causes risks of spreading inaccurate information and propaganda under the guise of independent journalism.

"Now the media outlets that are supposedly independent are becoming popular in Kazakhstan. After the "January events" and after Nazarbayev left office, several supposedly independent Telegram channels and supposedly independent journalists appeared. Moreover, the media that appeared during the "January events" or became popular during that period began to publish compromising information about the family of the former president <...>. That is, they began to publish information that was in the hands of the authorities all the time, but they did not give it to anyone. And the authorities, in order to increase ratings and pretend that supposedly there were political changes in Kazakhstan, began to publish this information in Telegram-channels and on the media. These Telegram channels and major news outlets, for example, Orda.kz, they published the so-called investigations. There was not a single word about the current government, only about the former president. And Orda.kz is now becoming top ranked, people think that it is an honest media. They do not know that it is necessary to double-check the information, whether they wrote before the "January events" about the family of the ex-president. Such "wrong" media are now growing in popularity. I am half afraid that the authorities manipulate and create by their own the controlled 'independent' media and controlled 'independent' journalists."

1.8.4.2. Level of Credibility to Different Types of Information Sources

As for general trend in the level of credibility to different types of information sources in Kazakhstan, one can see that credibility to domestic sources is higher compared to foreign sources, but there exists a misunderstanding of the media structure and skepticism towards foreign and Russian sources. These observations will be discussed in detail below.

Credibility to domestic sources. Experts note that Kazakhstani citizens have more trust in domestic sources of information than in foreign media. This is because domestic media better corresponds to the interests and cultural experiences of the population.

"There is more trust in domestic sources compared to foreign and Russian media. The fact that there is more trust in Kazakhstani sources according to your research, I believe, yes, it is so."

Misunderstanding of the media structure. Experts suggest that many citizens do not distinguish the concepts between public and private media, which can lead to false perception of information. The necessity of a clearer identification of sources is emphasized.

"They trust the state media, but people often don't really know whether the media is public or private. They say we don't trust private media, but in fact they think that the Tengri News is public, but it is private. There is a point, too."

"People get more information on the Tengri News, Zakon.kz, and they are actually private structures. One can take as an example the same TV channels, the KTK, which has a large audience, its ultimate beneficiary is the ex-president. People believe that this is a private media... I think that people are confused about what is public and what is private. But the fact that Kazakhstani media have more credibility is true."

"Private…I don't think we have independent private channels in principle, they have in any case some state participation."

"Private…I don't know, do we really have private channels? All private channels are also state-owned, they are very affiliated, and are in the hands of oligarchs who are also under the control of politics."

Skepticism towards foreign and Russian sources. There is a certain skepticism and distrust in foreign and Russian sources of information. According to experts, this is linked with various factors, including the influence of propaganda and conflicts in the CIS region, such as the situation in Ukraine.

"Kazakh society is not one that will trust foreign channels, no. Under the influence of some propaganda, there is little trust in Western sources of information."

Separation among society relating to credibility to the Russian media. Experts note that the situation in the region, including the conflict in Ukraine, has caused a "societal polarization" regarding the trust in the Russian media. It can be seen in the fact that some citizens have full credibility to them, while others have not. Experts also link this observation with the uneven development of media in different regions of Kazakhstan; some regions have stronger influence of Russian media due to close geographical proximity and availability of Russian TV channels.

"Now with the war in Ukraine, a split in society has occurred in relation to the Russian media. Not in terms of arguing, but with respect to that someone trusts 100% and someone does not trust 100%. However, it is clear that both are wrong here, you need to check the information, but still the split has occurred. Now one cannot say whether with the end of the war it is over or not, but now this situation cannot be properly evaluated, because there is a lot of emotions today in relation to Russian media."

"The most popular Russian TV channels are in the regions where the majority of the Russian population live, mainly the North of the country. Recently we had a report in Azattyq, for example, in Pavlodar there is a village Tchestnoye, and there are no Kazakh channels at all, no access to them, there are only Russian ones. Even if you are on the way near the Syr Darya River in the South Kazakhstan oblast, you receive a message "Uzbekstan Kosh Keldynyz". I mean, there are no strict boundaries. For example, there is a village where Uzbek TV channels broadcast on default, that is, the antenna has access to Uzbek TV channels. And people watch it."

1.8.4.3. Dynamics of Society Credibility to Media

Comparing the level of society credibility to different media, it is possible to point out a trend towards a gradual decline in credibility to official media and growing confidence in new media and civic journalism, such as YouTube bloggers and independent activists. It is also worth paying attention to stratification of the society on the issue of credibility to media depending on political and ideological views. Let us consider these trends more thoroughly:

Gradual decline of credibility to the media. Experts believe that at the moment, there is a decline in society credibility to the media in general. This trend can be explained by the fact that many media outlets are often seen as media transmitting official government policy, which raises doubts about their independence and objectivity. This leads to the increased interest in alternative sources of information such as new media and civic journalism.

"In general, the level of credibility to media is very low. One of the reason is that they also broadcast the position of the state, they are financed by the government, they praise the state policy, and because of this people do not trust the local and republican media."

"Since the last situations and disturbances in the country, of course, there is trust, I will not say that people do not have credibility to media at all, but it is not appropriate, in some way. After all, a person can watch or read news, but his/her trust will not be high to the state channels, for example, because people say: «You are not telling the truth, you are not writing about everything».

Growing credibility to new media and civic journalism. Experts note that in modern society there is a marked increase in credibility to new media and citizen journalist, such as YouTube bloggers and independent activists. This trend is explained by the fact that such sources of information are often seen as more independent and objective than the well-known media. Citizen journalists and activists are gradually gaining ground and popularity as sources of information, covering events that might remain underrepresented on the official media. They are often funded by their audience, which underlines their independence and freedom in choosing topics and formats.

"Credibility to YouTube is growing. That is, YouTube bloggers, citizen journalists are becoming popular. They receive some small donations; they have their own audience, not a lot, little money there. And these citizen journalists work. Duman Mukhametkarim, a local opposition journalist and activist, is currently in prison. For example, Askhat Niyazov has become very popular. He has published reports play-by-play on activist cases, as well as "January cases". People support him too. For example, there is a ProTenge project, they operate without support, do not obtain bids, and receive some subsidies from international organizations. Only when they post that "We need support", then they get, and there is no such permanent financing from the audience."

"For example, we have such a cool project "Batyr Jamal", and this "Batyr Jamal" writes about women's rights, namely how women's rights are restricted in Kazakhstan. I think that its audience are the people who are well-read, smart, mostly women. They support each other. When they publish "We need money", people are ready to help. That is, they have managed to create their own community. Askhat Niyazov, for example, YouTube-author, is considered the best journalist in Kazakhstan. He also managed to create his community. His program is called "Akim"; he managed to create his audience, and they support him. There is Duman Mukhametkarim, he also has his own audience, which is linked more to opposition. His audience supports him with donations too."

Stratification of the society regarding credibility to media. In experts' answers one can clearly see stratification of the society regarding credibility to media. This stratification is determined by different preferences and levels of credibility, depending on political and ideological views. For example, some members of society have greater credibility to opposition or independent media, such as bloggers and citizen journalists, while others remain loyal to government or official sources of information.

"If, for example, we consider "Azattyk Radiossy", which films only about opposition, part of their audience will trust only them. If we take Khabar, the state media of Kazakhstan, it is implicit that they are watched by party members, deputies, of course, they will have more credibility to these channels. Here, it depends upon the audience again. We have a very large stratification in society; however, it should be taken into account, too. In any case there is credibility, because the person wants to get something, but otherwise whom can he/she trust, it will not be the Russian media."

1.8.4.4. Evaluation of Objectivity Dynamics in Kazakh Mass Media

The state of objectivity in the Kazakh media is questioned, especially in the case of the state media, which are often perceived as a tool of propaganda used by the government, ignoring some acute problems and criticism. Despite some positive changes towards more objective coverage of the events after "January 2022", systemic challenges related to restrictions on freedom of speech and media independence are still going on. Let us consider in more detail the observations and conclusions of the experts:

State media bias. The state media in Kazakhstan often demonstrate obvious bias in the coverage of events, concealing the topics, which are disadvantageous for the authorities. In particular, experts note that leading state television channels, newspapers and news agencies often ignore acute problems, criticism of the authorities, protests. Instead of covering the real issues and demands of protesters, they focus on the official position. The state media do not mention the inconvenient historical facts connected with previous political periods and leaders. Experts speak about the silence of important topics and events in the interests of the authorities. Thus, according to experts, leading state-owned media in Kazakhstan often act as the voice of the authorities, but not as objective media, which causes reasonable criticism.

"A year ago we had the "January Events", and they showed us that the media are propagandists. That is, nothing has changed there, they are not objective at all. For example, the Tengri News, the largest agency, has condemned Zhanbolat Mamaev. And if you write in Tengri News search engine the word "Mamayev", what did they write about him? Although he is a well-known political activist in Kazakhstan, he is a politician. The Tengri News did not write anything about Mamayev. The only news was that he was convicted. Another example, "Egemen Qazaqstan", the largest state newspaper with wide circulation, it is obligatory to subscribe to "Egemen Qazaqstan". If you open "Egemen Qazaqstan" and write in the search engine "Kantar OkiGas", there are no publications about victims, torture or shootings. Only the official part is published: during the "January Events" people caused financial damage amounting to so-and-so much. That is to say, these media outlets publish only the state's position. If you watch national or state affiliated TV channels, according to them, as if terrorists attacked Kazakhstan, they caused financial damage amounting to billions. If they were objective, they would say that the people came out, they demanded good social conditions, they demanded cheap gas prices. There are no words about these requirements at all, it is impossible to find out what have people exactly demanded. This is an example only of the January events. Prior to these events, there were public peaceful assemblies in Kazakhstan, but no publications about them at all. That is to say, the last two or three years, whatever period we consider, these media are controlled, their content is official and they do not give full information."

Serious challenges in ensuring freedom of speech and independence of journalism. In general, Kazakhstan continues to face serious systemic challenges in ensuring freedom of speech and independence of media and journalism. In particular, it was noted that a significant part of the leading mass media in Kazakhstan is controlled and financed by the state, which limits their independence and objectivity. According to experts, these system restrictions on freedom of speech seriously hinder the development of professional journalism and objective information sharing with citizens about what is happening in society and within the country.

"As for media sphere, yes, there are a lot of problems, because we still have most of the channels and media operating at the expense of the state; here I must admit that we have it because of a poorly developed market and little competition. Therefore, it is not worth waiting for something supernatural in the near future."

At the same time, some experts note that there have been some positive changes in this direction recently.

Growth of objectivity after "January Events 2022". During the interview, the opinion was expressed that after the tragic occurrence in January 2022 in Kazakhstan there was some, albeit small, growth of objectivity in the coverage of acute social and political issues in the media. In particular, the experts note that journalists and public figures have become a little bit more daring to raise issues that were previously considered closed or inconvenient for the authorities, to criticize certain aspects of the work of officials and state bodies. Moreover, according to them, after the "January Events" the demand for more balanced information about the events has increased, too. It also encourages the media to be more objective in reporting issues. At the same time, the experts stress that these changes are limited, and systemic issues regarding media independence and freedom of speech generally remain. Nevertheless, these trends give rise to cautious optimism.

"Once again, it's all about the Kantar (January Events). Given that we have a new Kazakhstan, as our President has repeatedly stated, still much has changed after this occurrence. Because our society has already reformed, our society demands already clarity and some truth. If we turn back to 2022 or even 2019, when we had our first president, there was less objectivity, I think that is true. With the new president and announcement that we have now a new Kazakhstan, no matter what anyone says, I believe that one can see today more objectivity in our country. Journalists have become bolder and more courageous, active part of the civil society and media reporting have become bolder."

"I think the Kazakh media have become more objective. I believe that the channels for obtaining information vary depending on specific social networks. Partly fashion, partly some technical issues. Let us say that I focus on the development of my media on Telegram. Why I did this? Because we, when the January events took place, were all convinced that the only source that cannot be 100% banned is Telegram. And experience of the Russians who have tried for a year to use social networks, showed us that the most reliable is Telegram and it has the future."

"However we have some positive changes, we still cover the problems. Akims (head of a local government in Kazakhstan) have become braver to say us something, before they just ran away from us. So, I think there are problems, but I am sure they can be solved because there's no other way. The public will demand information, news, some content, objectivity, and for all these reasons, I think that TV channels will also make advances, because if there is demand, then there will be supply. In general the situation looks like that."

1.8.5. Media Literacy of Population

1.8.5.1. Concept of Media Literacy and Its Correspondence With Modern Technologies

In the modern information space of Kazakhstan, media literacy is becoming more and more relevant and multidimensional concept, which includes information, digital and computer literacy, and, according to experts, requires the addition of a new component: algorithm literacy. However, with the development of artificial intelligence there are also serious risks associated with the dissemination of fake information and manipulation on the media landscape.

Concept of media literacy. According to experts, media literacy is a complex, multidimensional concept. It includes various types of literacy necessary to operate efficiently on the modern media landscape. In particular, experts single out the following types of media literacy:

- **Information literacy** - ability to navigate information flows, identify information needs, effectively search and critically evaluate the information.
- **Digital literacy** - skills of using digital devices, software and hardware, as well as online services to solve problems and meet their needs.
- **Computer literacy** - basic computer skills, ability to create and edit content.

“Media literacy is certainly a multifaceted concept. It is complex and includes many aspects. UNESCO proposes a classification scheme that describes various aspects of media literacy. I generally agree with this classification, wherein media literacy includes information, news, digital and computer literacy.”

It is necessary to add algorithm literacy in connection with the development of artificial intelligence (AI). Experts suggested that the concept of media literacy should be supplemented by another component, algorithm literacy. This is due to the active development of artificial intelligence technologies. Algorithm literacy means understanding the basic principles of algorithms, the ability to analyze and critically evaluate the work of algorithms, in particular those used in artificial intelligence technologies. Experts believe that in the time of increasing data volumes and spread of “smart” algorithms, it is necessary for people to understand how algorithms work, to be able to evaluate the quality of their work, and to identify situations where algorithms can have manipulative influence. Thus, algorithm literacy should become another important constituent of media literacy in modern society. This will enable people to better adapt to the realities of digitalization.

“At the last meeting with our colleagues, we have discussed the necessity to introduce the algorithm literacy. This concept is also important for the audience, given that artificial intelligence is both an opportunity for the development of media and information space and potential risks.”

“In the future, it may cause people to stop distinguishing between natural and artificial. At the moment, the most important thing is to learn how to analyze and verify the information.”

Artificial intelligence carries the risks of spreading unreliable information and erosion of credibility to information space. Experts stress the thesis that introduction of artificial intelligence technologies carries risks for the information space. In particular, the possibility of automated creation and distribution of fake information using AI is a key risk. It is noted that there are already examples of the generation of false texts, images and videos using neural networks. According to experts, mass distribution of such fake content can undermine credibility of the audience to information space as a whole, as people will lose confidence in the ability to disengage truth from a mass of lies. Moreover, AI technologies can be actively used to manipulate public opinion and influence people (generation of “deepfakes”, creation of false statements, etc.). Thus, according to experts, artificial intelligence carries serious risks for the information environment, which must be taken into account.

"With the appearance of artificial intelligence, there arise certainly many risks associated with fake information, creating deepfakes and other kinds of falsehood. These kinds of information are easily created by simply pushing a button and can be actively disseminated. Below I give examples of such risks.

The first is surely the development of this variety of fake and unreliable information. It is clear that available and free versions of AI usually do not have this capability. However, advanced versions are constantly developing, and every day surprise us with new features.

The second is that artificial intelligence carries threat to the academic environment. Artificial intelligence allows just with a few clicks to create conditionally unique texts. For example, in an academic environment, when generating creative works, research papers and course projects, it can devaluate classical education if we do not find ways to counter and verify such texts. Nowadays such mechanisms already exist, but it should be kept in mind that artificial intelligence is always on the move and is going forward.

The third risk associated with artificial intelligence is that it clutters the common information space. Here we speak not only of intentionally created fakes, but also of the fact that the audience, when receiving information, has not previously experienced such uncertainty in its veracity. At the present time, this discontent, in my opinion, is growing essentially. Thus, there is an increased possibility that information can be generated simply at the request of a particular group of people and so on.

The following risks, in my view, relate primarily to threats to specific individuals. This includes manipulation involving the deliberate destruction of the image of people, organizations and other structures. Artificial intelligence provides the means for such manipulation, for example, by creating false statements of media personalities.

In its final result, it is a kind of a game that creates a situation where all the information space around us is brought into question, whether it is true, generated by human or artificial intelligence."

It is important to develop critical thinking and information analysis skills, the ability to identify fakes and manipulation. Experts also have raised the subject on importance of developing critical thinking and information analysis skills among the audience. This is particularly topical in modern information space for detecting unreliable content and manipulation. In particular, experts believe that it is necessary to teach people to bring into question and critically evaluate the received information, to check facts from different sources, and to identify logical inconsistencies and hidden manipulative techniques. It is also important to develop the ability to detect fakes, deliberately false information masquerading as truth, because recently there has been an increase of fakes on the Web. In addition, according to experts, it is necessary to teach the audience to identify propaganda and manipulative techniques in the media to counter the latent influence. Critical thinking, therefore, plays a key role in this modern age.

"When we talk about media literacy, first of all we pay attention to the ways the audience consumes the information. To what extent it is able to critically evaluate information, analyze it and distinguish qualitative information from "fast food". Media literacy also involves the ability to detect manipulation, propaganda, and critically evaluate the information it consumes. In this regard, I believe that there are many problems in Central Asia countries, as well as in many other. Active development of social networks/messengers and the preferred consumption of information using them make it very difficult for the audience to distinguish and somehow analyze the information."

"In my opinion, first of all it is necessary to develop skills of information analysis. With the development of artificial intelligence and expansion of this technology, many fakes have appeared. For example, in the days before this technology, people said, "Seeing is believing", and now we say, "Check the information for authenticity". I believe it is important to teach people to use reliable sources of information as well as analyze and verify even the official sources."

1.8.5.2. Decline of Credibility to Russian Media in Kazakhstan

Given the declining confidence in Russian media in Kazakhstan, there are several key factors influencing this trend. The experts highlight the following aspects related to this dynamics:

Language and national identity. Experts note that language preference plays a significant role in generating confidence in media and changing media consumption in Kazakhstan. According to experts, one can see an increase in the consumption of media content in the Kazakh language. This is due to the state's active support of the Kazakh language and the desire to strengthen the Kazakh national identity. Kazakhstan's audience, especially the indigenous population, who speak Kazakh, is becoming more interested in media products presented in this language. It is reflected in their media preferences and they are more inclined to trust local sources of information that provide content in the Kazakh language. The shift in priorities in media consumption is linked to national identity, too. Kazakhstan is actively striving toward decolonization and emphasizing its own national identity. Thus, the language aspect and the pursuit of national identity have a cumulative impact on the change of confidence in Russian media in Kazakhstan.

"The language aspect plays an important role. Recent research conducted by Internews in Kazakhstan showed an increase of users who prefer content in the Kazakh language. However, the Kazakh-language and the Russian-language media in the country have different information agenda; it represents an objective situation and carries some significant risks. Differences in information approaches can lead to conflict of ideas and opinions. On the other hand, this means that part of the population that consumes content in the Kazakh language remains in some isolation from Russian propaganda."

"We conducted a research on relationship between Ukraine and Russia, where it turned out that, depending on the language, the percentage of those who support the Ukrainian side and the Russian side is very different. For example, among those who support the Ukrainian side, 20% - Kazakh-speaking, and among those who support the Russian side 6% - Russian-speaking."

"When we consider Kazakh-language media, we see that the main audience is indigenous people, that is, Kazakhs, and these media strongly emphasize the idea of national self-determination. This idea plays a significant role in Kazakh-language media. It shapes the beliefs among the audience and influences its perception of Russian media, especially in the context of ideas of colonization and decolonization."

The impact of war and propaganda. Many experts point out that the outbreak of hostilities, namely the conflict in Ukraine, has had a significant impact on the attitude towards Russian media. This factor has caused doubts and questions among the audience, and many do not find answers that would satisfy them. With the intensification of Russian propaganda, the audience began to perceive the information with great skepticism.

"Indeed, the level of credibility to Russian media has decreased and I would like to highlight several reasons that have influenced this process. The first is, of course, the war, because from the very beginning of the military actions there are many questions about its origins and causes. People ask themselves these questions and, let us say, do not find satisfactory answers offered by Russian media. The answers given by Russian media do not correspond to their ideas about the world, and consequently the level of trust is decreasing. This is the first reason. The second is connected to the military actions and intensification of propaganda by Russian media. We see that media that are not ready to reflect the official position become either "foreign agents", or are forced to leave the country, or bear criminal responsibility, including for freedom of speech."

Change of national discourse. Experts also point at a change in general discourse in Kazakhstan, especially in the light of relations with Russia. Kazakhstan has taken a neutral position in the conflict between Russia and Ukraine, while the audiences is faced with the difference between the official position of Kazakhstan and the information provided by Russian media. This disagreement could undermine the credibility to Russian media and cause skepticism among the audience.

“The third reason, in my opinion, is linked with the fact that the general discourse, especially the state discourse, has changed in our time. It also relates to the situation between Russia and Ukraine, as Kazakhstan has taken the attitude of an outsider in this conflict. This resulted in a difference in the information submitted by the state media and Russian media. Recent research shows that despite some mistrust in the state media, a significant part of the population still has credibility to the official media. The difference in discourse leads to the fact that we believe either Russian media or our national. And, in my opinion, the majority of the population prefers Kazakh media.”

Consumption and content analysis. The experts also emphasize the importance of analyzing and systematizing the information in media consumption; it represents the fact that the audience, which can analyze in a critical manner and systemize the information, may be less exposed to the influence of Russian media and their propaganda.

“If we talk about mistrust of Russian media, we can say that it started after the war; the topic of decolonization and the Kazakh language became relevant, too. In this context, analysis and systematization of information play an important role when using different data.”

1.8.5.3. The Impact of Information on Society

Among the important informational events that have an impact on society are information wars, disinformation, propaganda and compromising information. These events have varying levels of impact and vulnerability in society. Let us consider each of them in more detail:

Information wars. According to experts, the vulnerability level of society towards information wars can be characterized as sufficiently high. Experts explain this point by the presence of contentious and opposite discussions on such issues in media space, as well as by geopolitical situation in the region and language policy within the country. These topics are often presented in the media in a highly emotional manner, provoking informational confrontation between different groups of the public. It is noted that under conditions of media wars it is especially difficult to determine the degree of reliability of certain information, as different parties can resort to manipulative technologies following their interests. Thus, according to experts, a significant part of the society is involved in the sphere of influence of information confrontation and has difficulties in critical evaluation of conflicting information in the midst of high political passions.

"As for information wars, it is difficult to give an accurate assessment, but I would estimate it as quite high. This is related, in my opinion, to current language issues that are acute issues for our country today. We have two key and controversial issues that often lead to conflicts and therefore contribute to information wars. The first is the situation between Ukraine and Russia, which still remains topical. The second issue at the sharp end is the language. This particular issue, in my opinion, is extremely tense in our country. It is actively discussed in the media and information space, and this is what can lead to information conflicts. I believe that even questions of national affiliation do not cause such an acute confrontation as the question of language possession."

"Information wars can have a strong impact on society and have negative consequences. During the pandemic, for example, misinformation led to serious consequences and many people were victimized by financial fraudsters attracted by false information. I evaluated the impact of information wars as high because it goes beyond conflicts between countries, such as Russia's information war against Kazakhstan. It can also go further between commercial structures and companies. In my opinion, it is very difficult to identify the reliability of information and the information itself during information wars. The person disseminating the information may seem to be ordinary, but he/she or others behind the information may have hidden deceptive purposes. We need to understand the reasons and goals, why the information was disseminated at a particular time, and what kind of interests are behind it. This requires analytical skills, experience and critical thinking. Detecting the authenticity of information is a complex task that requires major efforts and experience."

Misinformation. Experts have made similar assessments regarding the high vulnerability level of the audience towards misinformation. It is pointed out that in conditions of abundant information flows, citizens often face intentionally distorted or false information disseminated in the media and on the Internet. This can mislead broad segments of the population and manipulate the public opinion. As an example of misinformation impact, experts present situations during the COVID-19 pandemic, as well as cases of citizens' involvement in financial pyramids based on false information. At the same time, it is noted that there are certain tools to identify fakes and verify the accuracy of information, but in general, the level of critical thinking in society is not high enough to effectively counter misinformation. Thus, according to experts, the challenge of spreading false information is one of the most pressing in the context of media literacy of the population.

"If I tried to estimate the extent of exposure and characterize it, I think it's quite high, probably over 50%. But our audience, you know, is more educated in detecting disinformation, compared, for example, to propaganda. We have Internet resources such as factcheck.kz, as well as a state resource called "Stopfake" or something similar (I can specify the exact name, if necessary), which are actively fighting disinformation. In general, the state makes a lot of efforts to help audiences detect misinformation. So I would say that the degree of exposure to misinformation, in my opinion, is somewhere a bit higher than the average."

Propaganda. During the discussion, experts expressed different views on the extent to which society is exposed to propaganda. On the one hand, it was suggested that a significant part of the population is vulnerable to propaganda of various kinds, both from the state and from individual political and commercial actors. People are often in limited filter bubbles and do not analyze alternative points of view, what allows their opinions to be manipulated. However, another expert expressed a more moderate position, pointing out that propaganda does not always have a lasting impact on views of people. There was an example of a change in public attitudes towards a political leader despite yearslong propaganda about his cult. Thus, in general, experts tend to agree that a certain part of the society is influenced by propaganda, especially in the short term, but this effect is not absolute and universal.

"When we talk about propaganda, in my opinion, the audience has the greatest influence. There is a significant proportion of people in Kazakhstan who have the skills to detect and analyze propaganda. However, if we generalize, in my judgement, I would assess the degree of exposure to propaganda as average. Here I am not limited to considering only Russian propaganda. Propaganda can be both state and positional, and it can take different forms. The audience limited by filter bubbles due to lack of interest in diverse viewpoints and unwillingness to analyze them becomes vulnerable to propaganda."

"I would rate the impact of propaganda as relatively low. Propaganda can be aimed at both positive and negative goals, and its impact level can vary. Example of such propaganda in our country is the 30-years long campaign built on the personality cult of Nursultan Nazarbayev, everyone idolized him. However, in the present time, nobody cares about this person. Low rating is also connected with the fact that propaganda can promote both positive and negative ideas. For example, healthy lifestyle or peace promotions are also forms of propaganda, but they can have a profoundly positive impact on society. This is my opinion."

Compromising information. The degree of vulnerability of society to compromising information can be evaluated as average. It is noted that damaging information about certain individuals or organizations can surely mislead the audience and influence the public opinion. At the same time, it is emphasized that unlike large-scale disinformation, the compromising information usually affects a specific person or a limited circle of subjects. This allows the audience to analyze the situation more critically, taking into account different points of view on a person or organization. In addition, it is noted that a part of society has basic skills of fact-checking and checking the reliability of information about a particular person with the help of fact-checking tools. Consequently, according to experts, despite the potential risks, the level of critical analysis in the perception of compromising information is generally higher than in the case of disinformation, information war or propaganda.

"As for compromising information, I think that the rate of its exposure is lower here, and I would evaluate it as a bit lower than the average. That means slightly less exposure. What is important to consider here is the factchecking skills and the ability to verify information. In this case, dealing with disinformation seems more relevant, especially since compromising information usually concerns individuals or organizations, and audience that is familiar with these subjects usually tries to review the situation from different perspectives."

1.8.5.4. Level of Media Literacy Skills in Contemporary Society

In modern society of Kazakhstan, several key aspects of media literacy can be identified, which have a significant impact on the ability of the population to adequately perceive and analyze information, as well as to meet the challenges associated with manipulation and misinformation on the media landscape. Let us consider each aspect in more detail:

Distinguishing trolls and bots from real network users. Experts state that the population of Kazakhstan has a high ability to distinguish trolls and bots from real users of social networks. This skill is related to the experience gained in the process of interacting with manipulative accounts. According to experts, the audience quickly recognizes such accounts due to specific features, such as noncompliance of a profile with real users, strange posts and unusual behavior. However, experts note that trolls and bots may develop further and create more realistic accounts, but the audience usually adapts itself to such changes. Experts also emphasized that there are regional specific features in recognizing trolls and bots in Kazakhstan. For example, some accounts may be associated with certain organizations or officials, and this may affect the audience's ability to recognize them.

“As for ability to distinguish trolls and bots from real users on social networks, I believe that experienced users who spend a lot of time online have enough experience to do this. I notice that audience can quickly identify such accounts. I understand that these days trolls and bots try to create profiles as real as possible, but classic trolls and bots are pretty easy to distinguish for advanced users. I would say that level of this skill in the population is quite high. That is, when discussing news and other topics, the audience quickly identifies the double agents who are actively promoting some ideas. This may be due to the fact that, there was an experience made by some officials in Kazakhstan who used support from fake accounts, and their actions were so clumsy and inconsistent with the general perception of the audience that it was easy to find them out. This contributed to understanding that there were not real users, but the people broadcasting certain ideas. I think in this regard common network users have become very good at detecting such accounts and have a high level of identifying such profiles.”

“I rate the ability of users to identify trolls and bots as 5 out of 7. On social media, it is common to see comments like, “You don't have a profile picture, so you're probably a bot”, and the like. On Telegram, especially when there are comments in support of government officials, users quickly identify bots by the style of posts. Though not everyone can identify at once, but I still give 5 points for this skill.”

Awareness of the activities of social media algorithms on their access to information. Experts assessed the level of audience awareness relating to work of social media algorithms as average. Users have a general idea about the effect of algorithms, but lack details and specific knowledge about how they function. It is also noted that social media algorithms are updated regularly, which can make it difficult for users to keep track of their current status and impact on the news feed. Consequently, experts emphasized the importance of media literacy training to increase users' understanding and analytical skills in relation to information on social media.

“As for level of awareness of social media algorithms and their impact on access to information, of course, we actively discuss this topic and hold educational events where we talk about how social media algorithms work. In general, the audience has a basic understanding of this process. However, in my opinion, this understanding is not complete enough, and secondly, we have to take into account that social media algorithms are constantly being updated and changed, which, in its turn, means that audience does not always keep up with these changes. I believe the level of awareness at this stage is rated as probably average.”

“For example, during our training sessions we often ask participants if they understand about how their social media news feed is shaped. About 80% of the audience has a common idea of the process, but that is a general picture, shall we say. I'm not sure if they are actively using any tools to get around these algorithms or deceive them. Essentially, they have a general idea of the process and mechanisms, but they probably don't turn to specific methods to get these around algorithms or to deceive them.”

“At the moment, I think a lot of people know how media algorithms work in social media and how information bubbles are generated. But if we rate it, I'd give rather 3 point and 7.”

Factchecking skills. Experts assessed factchecking skills as insufficient. The audience, in their opinion, often depends on resources that can verify information instead of analyzing it independently. There is also a lack of confidence in the ability to distinguish true from false information, indicating a lack of media literacy and critical thinking. According to experts, this stresses the importance of training and education in factchecking to increase independence and critical thinking in evaluating the information that the population uses.

“Factchecking skills are pretty weak. The audience is mainly oriented towards resources where information can be checked, but the skill of searching and checking information independently is still underdeveloped. Therefore, in my opinion, the score is average. I can't say that the skills are completely absent, but I can say they would rather know where to look for confirmation or refutation of information than are able to do it independently."

Identification of fake news. Experts expressed concern about the low level of identification of fake news in Kazakhstan. Even among educated and literate people, there is a tendency to repost or disseminate fake news, indicating thereby that manipulative information is widespread.

"In my opinion, things are no better in our country relating to detecting fake news and conspiracy theories. This problem affects even educated people, including those who have higher education and are public figures. They often broadcast such news themselves."

"I would rate the judgement about the ability to identify false information as 4 points out of 7 and the factchecking ability as 3 points. The difference between identifying false information and factchecking is significant because factchecking requires critical thinking skills and the use of certain tools. These abilities are poorly developed within our country."

1.8.5.5. Credibility of the Population to Media

One of the most important trends in Kazakhstan's media space today is changing preferences of the population in choosing sources of news and analytical information. The time when traditional and state-run media played a major role on the media landscape is giving way to a period of information freedom and availability of a variety of sources. Experts discuss the following theses related to this dynamics:

The level of credibility to state and traditional media is declining. Experts note that the level of public trust in state media and traditional media has been markedly declining in recent years. In particular, it was noted that move of the audience to information consumption mainly from the Internet and social networks contributes to the decline in credibility of traditional media, since the Internet offers a greater variety of sources and points of view compared to traditional media. The bias of state media and their tendency to cover events solely from the official point of view, which can cause irritation in the society, was also mentioned as an important factor of credibility decline. Moreover, according to experts, the content produced by traditional and state media is often perceived by the audience as old-style, boring and monotonous. It loses out in competition with independent bloggers and media. To remedy the situation, they need to completely change their approaches to information submission, because, according to experts, as the Internet audience grows and online media penetration increases, credibility to state media will inevitably decline. To maintain and support it, they will have to change in line with the new media environment.

"In my opinion, the level of trust in the state media has declined today compared to time before the pandemic, let us say, four years ago. I can't give the specific factors that have affected this change, but it probably has to do with a change in the way people consume information. Now people are increasingly turning to the Internet and social networks as sources of information instead of traditional media."

"There is a trend in Kazakhstan where some traditional media, including newspapers, may be said to have become a thing of the past. They do not disappear completely, but they are progressively moving online, starting to run and broadcast their materials on the Internet. However, in order to broadcast information online, traditional media need to provide information that is competitive with what is offered by social networks and other Internet media. You see, to stay relevant, traditional media will have to make significant changes."

Consumption of information from the Internet and social networks is growing. One of the key trends noted by experts is the growing consumption of information from the Internet and social networks. In their opinion, an increasing part of the population, especially young people, gives up watching television and reading print publications in favor of receiving news and analytics from online sources. An important factor here is convenience and efficiency, news on the Internet appears much faster than on TV or in newspapers. In addition, online sources provide an opportunity to comment and discuss news. One more important factor is that alternative viewpoints are more widely represented on the Internet than in the state media. Users can get information from different sources and form their own opinions. Thus, the audience is actively moving to the consumption of news and analytical content mainly from online sources, giving them the ever-growing preference over traditional media. This trend, according to experts, will only be reinforced.

"While social networks and unofficial media on the Internet can become spreaders of fakes and misinformation, they also broadcast a diversity of opinions and views. They allow people having first-hand information and facts to voice their opinions. As a result, we have a picture that differs from the one presented by official television. Because of this, in my opinion, the level of trust in the state media is decreasing. Moreover, I believe that traditional media in their current form cannot offer content as attractive as that on the Internet."

A certain level of credibility to state media is preserved in the absence of alternatives. Despite the decrease in the audience's trust in the state media, experts believe that a certain level of credibility still remains. This is due to the fact that a part of the population, especially the older generation, simply has no alternative sources of information. Such people have to rely on republican TV channels and other state media, as they are not active users of the Internet. Moreover, despite criticism against state media, some citizens still believe that information from state sources is the most reliable. This allows such media to maintain a certain level of loyal audience.

"In the absence of well-developed freedom of speech or democratic principles, it is quite difficult to determine the level of public trust in the media. Credibility of population to the media is indeed not that high. However, sometimes people say that they do not trust the media, but in difficult situations they still show trust in them. This is because they often have no other alternative or tool to verify information. For example, I rely on the information provided by the Statistical Office. At the same time, I understand that this information may be unreliable, but I have no other sources and I have to trust this information. There are also many people in the society who contend not to trust the media, but in many cases they still accept their information."

1.8.5.6. Dynamics of Media Literacy Development

Despite the measures taken in Kazakhstan to develop media literacy among the population, experts note that real challenges and insufficient progress in this area still remain. In the context of the dynamics of media literacy development in the country, experts emphasize the following key aspects which form the up-to-date picture:

Moderate development of media literacy in the country. Considering the issue of media literacy development in Kazakhstan, experts note that, in general, there is a positive trend. Every year more and more people are interested in the topic of media literacy and acquire the relevant skills. In particular, in recent years there have been many educational projects aimed at teaching audience to critically evaluate information and identify fakes and propaganda. Experts note the growing demand for this kind of training. However, they believe that these efforts are not enough to reach the population on a large scale. So far, media literacy training is of selective nature and depends on the enthusiasm of NGOs and individual specialists. According to experts, for the systemic development of media literacy, it is necessary to include it in the educational programs of schools and universities. However, so far there has been little progress in this direction.

"Media literacy in the country is surely in active development stage, and this is certainly due to ample resources available to support it. We already have a significant number of sources to promote media literacy, including infotainment and informational and educational resources."

Main influence on the media literacy development comes from NGOs and grant programs instead of government initiatives. Experts emphasize the role of NGOs and international programs in the development of media literacy in Kazakhstan. In their opinion, most initiatives to promote media literacy are implemented by NGOs with the support of grants and sponsorship. This applies to both educational projects and research as well as publications about media literacy. It is noted that government structures are not yet sufficiently active in this area. Media literacy issues are almost not integrated into the education system, except for individual initiatives. According to experts, state information policy is aimed more at regulating the media environment than at developing the media literacy of citizens. Experts believe that a comprehensive solution to the issue requires an increasing cooperation of the state.

"I believe that the main achievements in media literacy development belong to various non-governmental organizations and public foundations, that is, not to the government sector. This development, to a large extent, is linked to programs and grants available in Kazakhstan and other countries. An example is the program aimed at developing media literacy conducted by UNESCO. It is important to note that information and training on how to detect fakes, check photos, analyze videos, and understand the methods of manipulation and propaganda have started to appear actively in the Kazakhstani information space relatively recently, I think, since about 2018-2019."

"There are non-governmental organizations, and it is worth paying attention to their activities in the field of media literacy. For example, according to my data, the Internews organization has conducted a number of studies with regard to media literacy. The organization "Kazakhstan Zhastar Akparaty" has also carried out a study on the impact of misinformation on young people in Kazakhstan. Moreover, the organization "Medianet" has developed and published a textbook on media

literacy for schoolchildren, and the Internews has published a textbook for university professors on this topic. It hast to be noted that significant efforts are being made in this area. On the brighter note, the existing initiatives still do not meet the requirements of our country with 20 million people."

COVID-19 pandemic effect on media literacy development. Experts note that the COVID-19 pandemic had an ambiguous impact on media literacy of the population of Kazakhstan. On the one hand, the infodemic[3] around the pandemic has led to a burst of fakes, conspiracy theories and misinformation. People, being in a state of uncertainty and fear, became more susceptible to conspiratorial ideas. However, on the other hand, the massive distribution of fakes during the pandemic has intensified the necessity of society for tools to verify information and debunk myths. Experts note that it was during the pandemic that the audience's interest in factchecking, verifying information, and identifying propaganda increased significantly. People began to demand more tools to separate truth from lie. Thus, the pandemic, having strengthened the belief in fakes, simultaneously stimulated the demand for increased media literacy in the society.

“The pandemic has certainly had a significant impact on the development of media literacy, being, one can say, a key catalyst in this process. Its impact can be traced both positively and negatively. On the one hand, the number of people committed to various conspiracy theories related to the coronavirus, its mutations and vaccination has increased. This was facilitated, firstly, by fear, which made people seek support in religion or conspiracy theories. Secondly, absence of information for a long time during the initial period of the pandemic. On the other hand, the pandemic also made people more aware of the fake information they encountered on social media. A large part of the population, especially the older groups, became more cautious and distrustful of information from social media. Public initiatives such as the creation of the Stopfake channel and the Telegram channel busting myths about the pandemic also contributed to this. Thus, the pandemic on the one hand increased the spread of conspiracy theories and on the other hand raised interest in factchecking and more critical attitude towards information in general. After 2020, audience became more interested in the ability to analyze information and verify its authentication. This has markedly changed the demand for media literacy training and counseling, as observed by researchers and trainers.”

Weak integration of media literacy into the education system. According to experts, media literacy issues in the curricula of schools and universities do not get sufficient attention. There is no comprehensive approach to teaching critical analysis of information and working with media content. Experts note only individual initiatives of teachers to introduce elements of media literacy into their courses, but they are of selective nature and depend on the enthusiasm of specific teachers. Insufficient qualification of teachers in media literacy is also mentioned as an obstacle. Experts say that systematic training of pedagogical staff is necessary for its large-scale integration into education.

“Media literacy is certainly developing, but this process occurs not so as we would like to have it. For example, social media and artificial intelligence have become an integral part of our everyday life, but education in schools and universities does not reflect this reality. Some foreign countries, such as Finland, have introduced media literacy elements into their educational programs, covering all subjects. For example, literature classes teach children to use language for manipulation purposes, at lessons of history they discuss methods of political propaganda and its influence on historical events, including wars and others. Even at math lessons pupils discuss the ways to use numbers to distort or represent facts. These lessons promote media literacy. In our country, as of yet, there is no clear concept of teaching media literacy and it leaves much to be desired. Recently, I have heard that global digital competence has been included in the school curriculum. However, I have a question: if teachers themselves are not fully proficient in media literacy, how can they teach this skill to children?”

Positive examples of integrating media literacy into education on the level of individual teachers and classes. Despite the common weak integration of media literacy into the education system, experts note a number of positive examples of integrating media literacy into teaching and learning activities. In particular, some teachers try to incorporate media literacy into their courses wherever possible. For example, when discussing feature films or books, they pay attention to the

[3] *Infodemia* or *information epidemic* is the spread of misinformation to create a stressful situation through rumors, fakes, exaggeration of the situation. In the abovementioned context it means excessive amount of information about the coronavirus, displacing therewith other acute political and social issues.

techniques of influencing the audience. Experts think of the example with a Kazakh language teacher who, during term, analyzes one film step by step in terms of language, historical context, and production. In this way, he develops students' media literacy. Experts consider such initiatives to be an important and necessary contribution to the development of this field.

“In the month of May, I conducted a training workshop on media literacy for university professors in Astana. One of the participants was a teacher from the Nazarbayev University, who was the head of the Kazakh language department and who also taught Kazakh at this university. I found her teaching methodology very interesting. She presented her curriculum to the workshop participants, wherein she divided the screening of the film into six weeks and held discussions about different aspects of the movie during that time. For example, she connected different topics, such as the 20th century history of the Kazakh people, work of the cameraman and the film director, with the movie The Road to Mother. Most of her students spoke Kazakh, but not all were willing to pay attention to grammar; and through film analysis, she promoted the development of thinking, speaking and writing skills in Kazakh, and taught them to analyze films adequately. It also promotes the movie literacy which is a part of media literacy. Thus, she has successfully introduced components of media literacy into her curriculum. I would like also to mention that the workshop was attended by a management and marketing teacher who taught his students to use social networks and media platforms to develop ideas and businesses.

1.8.5.7. Factors Slowing the Development of Media Literacy

The process of media literacy development in modern society faces a number of significant factors that slow down its pace. The most significant of them, according to experts, include:

Cautious attitude of government agencies toward independent NGOs working in the field of media literacy. Experts note a certain concern on the part of government agencies toward NGOs working on media literacy development. Among other factors, government agencies are not always ready for constructive interaction and cooperation with independent NGOs in this area, arguing that their activities are often perceived as undesirable and aimed at undermining the authority of the state and the official media. According to experts, government agencies fear that teaching citizens to critically analyze information could be used to discredit the authorities and promote opposition views. As a result, officials have a reserved and sometimes obstructive attitude toward NGOs' activities in the area of media literacy, which significantly slows down its development on a national scale.

“Unfortunately, nowadays we are faced with the fact that government structures and officials are not always ready to make advances and cooperate, although we are engaged in an important matter. In this context, in my opinion, there are two main reasons. First, there is not always a desire on the part of government agencies to develop media literacy in the country in the direction that we propose. Secondly, sometimes there is a bias on the part of the audience and the people we interact with.”

Distrust of people in NGOs activities on media literacy. In addition to the concern of government agencies, experts draw attention to the problem of mistrust of the part of society in the activities of NGOs relating to media literacy. In particular, some citizens perceive media literacy training programs implemented by NGOs as an attempt of manipulation and propaganda. This is particularly so with NGOs that receive funding from abroad. According to experts, there is the belief that under the guise of developing media literacy, NGOs are actually engaged in “zombieing” citizens and promoting strange values. This distrust makes it difficult for NGOs to work with specific target audiences and reduces the effectiveness of media literacy programs. Experts note the necessity to build a constructive dialog to break this barrier.

“First, there is a certain concern in a significant part of the population, as well as in some government structures, towards non-governmental organizations. Sometimes the idea is actively promoted that these organizations execute an "order" from the United States and do not actually contribute to the media literacy development, however, on the contrary, worsen its level. As an expert, I also face such assertions, especially when working with grants. However, in this situation, it may be useless to argue and prove anything. The only thing that can be done is to teach specific tools without imposing certain points of view. We have seen several successful cases when closed audiences, initially skeptical of us as trainers because we were working under the American grant, became loyal and ready to learn. We did not discuss propaganda as a country-specific phenomenon. Instead, we analyzed propaganda as a phenomenon that exists in different countries. We did not focus on Russian propaganda, but through the specific cases and situations we analyzed, the audience began to realize that something was wrong. We were not discussing fakes and non-fakes, but real cases that they encountered in their daily lives. They sent us messages in chats like Telegram or WhatsApp and we analyzed those messages, explaining how it worked. When the audience has realized how it all worked, how the mechanisms of information manipulation worked, their level of distrust decreased and they started to perceive information more critically."

Low quality of education, lack of courses on critical thinking. Experts mention the low quality of education and the lack of appropriate courses as one of the main obstacles to the development of media literacy. In their opinion, school curricula are not sufficiently focused on the development of critical thinking and analytical skills. Teaching is based on rote memorization of facts rather than on comprehension of information. At the same time, it is noted that teachers themselves are not always qualified in the field of media literacy. Thus, according to experts, in order to integrate media literacy into the education system, it is necessary to reform approaches to education in general and to train a new generation of teachers.

"First of all, it stands to mention the low quality of education. For example, the questions asked on the UNT (Unified National Testing) for admission do not require the development of critical thinking skills. They are rather aimed at memorization and rote learning. If a student has a well-developed memory, he or she can simply memorize the necessary information and pass the test. Questions are often connected to numbers and dates. Curricula do not include a discipline that teaches critical thinking, and textbooks are not adapted to develop this skill. Knowledge of teachers is also not always up to date. If we had quality schools, then students would develop and shape their critical thinking; this would allow them to have their own opinions and points of view. Even the science itself involves factchecking, verification of theories and formulas for validity. However, even with a quality education, children are often unable to apply their knowledge to everyday life and living. According to PISA rankings, excluding such schools as NIS (Nazarbayev Intellectual School) and BIL (Bilim-Innovatsiya), the level of education quality in regular schools remains very low, especially in rural areas and in cities except Almaty and Astana."

Restrictions to free speech, lack of independent sources of information. According to experts, restrictions to free speech on the media landscape are also serious obstacles to the development of media literacy in Kazakhstan. In their opinion, the lack of independent sources of information and alternative viewpoints narrows down the potentialities for citizens to critically analyze the situation. Without access to different data and opinions, it is very difficult to develop skills on information verification and objective evaluation of events. In addition, restriction of freedom of speech prevents free discussion of acute issues affecting the interests of the authorities.

"Another factor is absence of freedom of speech in the country. Despite the presence of people with developed critical thinking, the lack of available information prevents them from making comparative analysis. Freedom of speech is not limited to the right to express opinions and views, but also includes the availability of alternative information, diverse viewpoints and independent statistical agencies, which unfortunately do not exist in our country."

Lack of open dialog and trust in society. Experts draw attention to the lack of open dialog and trust between different social groups. In their opinion, Kazakhstani society lacks a culture of discussion and debate on acute and controversial issues. Any dissenting view is given a hostile reception. Moreover, one can see unfriendliness of some social groups toward others, for example, ethnic, religious and so on. There is lack of tolerance and no tolerance for opposing views. According to experts, this atmosphere of mistrust and intolerance hinders the development of critical thinking.

"Another factor that restrains the development of media literacy is the lack of dialog in our society. In our country, there is a certain amount of antipathy towards representatives of the authorities, the LGBT community, various ethnic groups and representatives of religious organizations. This negative attitude has its impact on freedom of speech and expression. If we encourage open dialog, discussions and debates wherein opinions and views can be exchanged, then development of critical thinking will be stimulated. Currently, one can see distrust between society and public institutions."

1.8.5.8. Conditions Necessary for Effective Promotion of Media Literacy

The successful promotion of media literacy among the population requires certain conditions, which experts consider the key in this context. Let us consider the following theses:

It is necessary to establish cooperation between NGOs and government agencies in the field of media literacy. Considering the issue of effective promotion of media literacy, experts emphasize the importance of establishing cooperation between NGOs and government agencies. In their opinion, many existing NGO initiatives relating to media literacy have local character for lack of understanding and support from government agencies. In order to implement large-scale and long-term programs, it is necessary to combine efforts and resources of the state and the third sector. Experts believe that government agencies should consider NGOs as partners, but not competitors in this sphere. Only the synergy of state and public sectors can bring the development of media literacy to a qualitatively new level, experts summarize. This should become one of the priorities of information policy.

"First, in my opinion, a very important factor will be the creation of joint programs with the state. Nowadays, many projects, though not all, interact directly with the audience without government involvement, and this issue can make government agencies perceive our organizations as competitors or potential rivals. This is why I think it is important to participate from the very beginning in creation of joint media literacy programs with the state. In this case, the situation will probably improve not in percentage terms, but exponentially, because in our Central Asian countries the hierarchical power structure plays a significant role. All educational institutions and mass audiences are essentially subordinate to the state. We need state-related projects that will promote media literacy and work deliberately in this regard."

Long-term government programs on media literacy are needed, not one-off events. Experts emphasize that one-time educational events and trainings are not enough to effectively develop media literacy on a national scale. In their opinion, it is necessary to have well-thought-out long-term programs at the state level, intended to last for years. This is the only way to reach a significant audience and achieve a sustainable effect. In particular, it is proposed to develop a separate state strategy or plan for media literacy with specific targets. The implementation of such a program would require creation of special structures and interagency coordination. But only complex approach can ensure this progress.

"Non-governmental organizations such as Internews and Medianet, by holding three-day or week-long media literacy trainings, may mistakenly believe that they are able to teach everyone this skill. In my opinion, short-term workshops may involve certain difficulties in achieving this goal. We need long-term plans and strategies to successfully develop media literacy. Not coincidentally, if my memory serves me correctly, that last year in the fall the president of the country has announced an information doctrine. We need documents like this that will have power and management at the state level."

It is important to integrate media literacy into the curricula of schools and universities. Experts also emphasize the necessity to integrate elements of media literacy into educational programs. In their opinion, it is possible exactly through the education system namely schools and universities, to reach the widest audience and develop media literacy skills among the younger generation. It is proposed to include relevant topics, courses and modules in the curricula and programs of various disciplines. For example, elements of media literacy can be integrated into literature, history and social studies classes. In addition, according to experts, there is a necessity for targeted training of pedagogical staff who can competently teach the basics of media literacy.

"If we integrate media literacy and critical thinking components to the curricula of schools and universities, we can build and develop these skills among pupils and students. If teachers start teaching media literacy and critical thinking by introducing these components into their learning materials from grade 1 to grade 11 (in schools) or from year 1 to year 4 (in universities), we can achieve the desired level of skills. This should be handled by the Ministry of Education and a separate strategy or plan should be developed at the state level."

The state itself needs to improve media literacy skills. Experts point out that in order to effectively promote media literacy in Kazakhstan, the government itself needs to improve its competence in this area. In their opinion, the insufficient level of media literacy of public employees and representatives of government agencies sometimes hinders the implementation of a well-thought-out information policy. In particular, in a crisis environment, such as pandemic or information wars, due to incompetence of officials one can see their communication errors, which increase the public mistrust. To remedy the situation, experts recommend to arrange regular training on media literacy and critical analysis of information for public officers at the country level. Advanced training will allow government agencies to more effectively use media literacy tools to deliver important information to the public.

"Our state should learn media literacy skills. Critical situations, such as pandemic or information wars with neighboring countries, have highlighted the importance of trust in state media. Developing media literacy in our country can mitigate such threats. Despite my critical views on state restrictions to speech freedom, I believe that even in such situations, the state itself should get knowledge on media literacy to ensure its current position. This aspect, in my opinion, is important for the state to understand."

1.8.5.9. Different Public Attitudes Towards the Coverage of Events in Ukraine

Considering coverage of the events in Ukraine, it should be noted that the public attitude to this problem is diverse and depends on many factors. Experts put forward the following theses that will help to better understand this dynamics:

Attitude depends on the sources from which people receive information. When considering the reasons for different attitudes of the society towards the coverage of the war in Ukraine, experts pay attention to the role of information sources that people use. In their opinion, much depends on what media - Kazakh, Russian or Ukrainian - a particular part of society uses to obtain the information. Different sources broadcast different narratives and interpretations of events. If a person reads only Russian media, he/she will have one opinion about the war, while if he/she reads Ukrainian media, then he/she will have another. Experts emphasize that the audience should be able to critically consider information from any source. However, on a practical level, most people form their views under the influence of the media environment in which they find themselves.

"Attitudes of the society towards media coverage of military conflict depend primarily on the sources of information people interact with and the type of information they consume. This point is very important. There are media that we consciously choose to receive information from. However, if we do not have the skills to critically select media and information sources, we risk being exposed to possibly absurd ideas spread from different sources. In the course of time, audience begins to trust such media and their broadcast information. Of course, it also depends on the level of critical thinking of each individual."

Influence of environment on a person. In addition to the influence of information sources, experts point to an important role of a person's environment in shaping his or her attitude toward the events of the war. It is emphasized that if the majority of people in a person's environment adhere to one point of view relating to the war, then it is difficult for him/her to publicly express an alternative position, even if he/she does not agree with it. This is due to pressure from relatives, friends, and colleagues. There is a "filter bubble" effect when a person finds himself/herself in an environment of like-minded people. Therefore, despite the desire for independence of judgment, in practice, the majority opinion in the environment often dictates the position of an individual on the issue of war coverage.

"Much depends on an individual's environment. If his environment supports a particular viewpoint, even if he does not share it, he may feel uncomfortable or even unsafe to express his opinion in a society where that viewpoint is not supported. As a result, the positions of the majority and those around him may place pressure on the individual."

Splitting of a society into different camps on this issue. Analyzing the situation in Kazakhstani society, experts state its split into different camps relating to coverage of the war in Ukraine. In particular, they identify three main groups:

1. those who actively support the Russian position;
2. those who actively support the Ukrainian side;
3. those who try to take a neutral position.

At the same time, there are acute conflicts between the representatives of these groups, up to the breakup of relations and even marital breakdowns on that ground. Such opposing separation, according to experts, is a consequence of acute and emotional perception of the war events, as well as the powerful influence of propaganda from both sides of the conflict. Consequently, it is necessary to find ways to overcome this polarization and establish a dialog between different groups in Kazakhstani society.

"In my opinion, although the local media and the official position of Kazakhstan demonstrate a balanced position, helping citizens to get a diverse view of the situation, but nevertheless the filter bubble still exists. It is because that situation with

the military conflict is of interest to everyone in Kazakhstan, despite the official position of the state. Many people have friends, acquaintances and relatives in Russia and Ukraine, that is why Kazakhstani society is divided into three camps. Some passionately support the Russian position, others support the Ukrainian position, and others strive to remain neutral. This leads to many conflicts, clashes and misunderstandings, which sometimes have physical consequences. Some families even divorce because of the divergence of views on the situation, and society becomes disjointed."

The result of a long-standing policy to divide the society by language. Analyzing the underlying causes of the split in society, experts point to the long-standing language policy as an important factor. In their opinion, over the decades Kazakhstan has encouraged the division of society into two groups - Russian-speaking and Kazakh-speaking citizens. Thus, different language groups received different messages from the authorities. The Russian-speaking population was told about the unity of all citizens of Kazakhstan regardless of ethnicity. At the same time, the Kazakh-speaking population was told that all citizens are first and foremost Kazakhs by nationality. This policy led to the formation of divided linguistic segments in society with their own information agendas. This can be also seen in the split around the coverage of the war.

"I believe that this situation with the split of society with regard to coverage of the war in Ukraine is the result of the policy pursued over the past 30 years. This policy divides society into two groups: Russian-speaking Kazakhstanis and those who speak Kazakh. Even former and current presidents, when visiting different regions of Kazakhstan, use different rhetoric. In the north, the president speaks in Russian and expresses the opinion that despite different nationalities, we are all Kazakhs, while in the south he speaks Kazakh and says that we are all Kazakhs. This does not mean that we are all from different ethnic groups, as in the north, the matter is just that we are all Kazakhs. This dichotomy has arisen because of a poorly developed legislative framework on the state language status, as well as lack of political will and determination. As a result, two separate groups have formed: the Russian-speaking population and the Kazakh-speaking population. This division in society was a consequence of the wrong linguistic policy in the country and long years of activities of the state media. This has led to decline in trust of Kazakhstanis in domestic media and increase in trust in Russian media. Because of the wrong approach to the language policy and actions of the state media, people started to trust Russian sources of information more, especially those who speak Russian and use Russian sources of information."

Insufficient knowledge of the state language by a part of the population. Discussing the language policy further, experts point to the problem of insufficient knowledge of the state language, Kazakh, by a part of the population. Many Russian-speaking citizens, not speaking Kazakh, are cut off from understanding Kazakh media and have to get information only from Russian sources. It is emphasized that if in the 1990-2000s all citizens of Kazakhstan had necessarily studied the Kazakh language, there would not be such critical information differences now. This indicates that citizens who speak both Kazakh and Russian have more opportunities to obtain information from different sources and form a balanced position. Thus, the expansion of knowledge of the state language would contribute to overcoming the split of society in terms of information perception.

"In our society there are people who speak only Russian and those who speak both Kazakh and Russian. Russian speakers, due to their lack of knowledge of the Kazakh language, cannot fully understand what is happening in the Kazakh information space. They receive information from Russian media outlets and form their opinions and views based only on this information. It should be mentioned that international or Central Asian organizations that oppose Russia's actions and support anti-Russian positions, often use Russian as a common language of communication when executing projects and organizing events. Thus, if there had been compulsory Kazakh language education for all Kazakhstanis in the 1990s-2000s, we might have avoided such difficulties nowadays."

"I do not claim that all Kazakh-speakers do not trust Russian-language media. Among Kazakh-speakers, there are those who support the Russian position, and among Russian-speakers there are those who do not support the military actions. ***Nevertheless, they all realize that Kazakhstan is a country with territorial integrity and they consider themselves the citizens of Kazakhstan, supporting the unity of the country****!"*

1.9. Main Conclusions

Socio-demographic parameters of respondents:

- The study involved 1005 respondents from Kazakhstan aged 14 and 65, with age and gender distribution corresponding to the general population.
- Residents of urban areas accounted for approximately 61% (615), while residents of rural areas accounted for 39% (390) of the total number of respondents. Distribution of respondents by settlement type and by region reflects the demographic structure of the sample.
- The share of Kazakhs in the 2023 survey is about 70%, Russians - 21%, the share of representatives of other ethnicities is 9%.
- Kazakh language slightly prevails as a language of home communication, i.e. it is used by 51% of respondents. Russian language as a language of everyday communication in the family circle was noted by 47% of respondents.
- Distribution of respondents by level of education shows the predominance of people with secondary (30%) and higher education (31%). These two categories together account for 61% of the total number of respondents.
- Income levels are higher on average in 2023 than in 2023 and 2019. The largest group of respondents (32% in 2023) assess their financial situation as average; they have enough finances to buy household appliances, but not a car.
- 56% of respondents have a job and a regular income. The largest share of employed respondents works in the sector of trade (20%) and services (20%).

Media Consumption:

- Online information sources such as social networks are growing in popularity as the main sources of information about life in the country (from 46% in 2021 to 57% in 2023). At the same time, traditional sources such as television, newspapers and radio have lost some of their previous popularity.
- From 2021 till 2023, the share of Russian language in media content has decreased: on television from 41% to 27%, on radio from 43% to 23%, in print and online media from 53% to 29%, on websites from 54% to 37%, and on social networks from 57% to 38%. At the same time, the share of Kazakh language content has increased across all platforms: on television from 11% to 24%, on radio from 12% to 25%, in print and online media from 9% to 24%, on websites from 7% to 17%, and on social networks from 8% to 18%.
- Young people (14-29 years old) are increasingly choosing Kazakh-language content, while decreasing their consumption of Russian-only content.
- In 2023, there is a growing interest in Kazakh-language media: the share of those choosing them increased on radio from 22% to 39%, in print media from 23% to 36%, on the Internet from 22% to 41%, and on TV from 28% to 44%. At the same time, the share of those who prefer regional and urban Kazakh media, Russian and foreign sources of information decreased.

Television:

- Among Kazakh TV channels, KTK (37%), Eurasia (24%), 31 Channel (22%), Khabar (22%), Kazakhstan (20%) and NTK (20%) are popular. As for Russian channels, then TNT (20%) and NTV (19%) are the most popular, while among foreign channels Nickelodeon (8%) is the leader. However, the overwhelming majority of respondents at the time of the survey did not watch foreign (69%) or Russian channels at all (42%).
- The majority of respondents (55%) support the preservation of Russian media in Kazakhstan, and 8% are in favor of increasing their programs. However, 17% of respondents propose the complete ban on Russian media, and 11% believe it is necessary to reduce their programs. These opinions differ depending on the language preferences of the audience: those who prefer Kazakh-language content are more in favor of shutting down Russian media (29-36%), while the Russian-speaking audience is more inclined to preserve (66-68%) and even expand (8-13%) Russian media.
- In 2023, the most popular television preferences in Kazakhstan remain national Kazakh news (45%), feature films and TV series (43%), as well as entertainment (27%) and music programs (27%). At the same time, compared to 2021, there is an increase in interest in national Kazakh news (from 35% in 2021 to 45% in 2023).

Internet:

- In 2023, about 97% of respondents have access to the Internet. Mobile access is the most popular (51%), followed by combined access (mobile and fixed) (30%). Only 3% of respondents have no access to the Internet at all.
- As for mobile internet in Kazakhstan, on can see an increase in the share of users who consider prices to be overestimated, from 47% in 2019 to 59% in 2021 and 63% in 2023. By regions, the highest percentage of those dissatisfied with the prices of internet services is noted in North Kazakhstan (91%), Kyzylorda (89%) and Akmola (78%) regions, and the lowest percentage in Mangistau (23%) and Zhambyl (31%) regions.
- 52% of respondents reject the idea of paying for access to interesting intellectual and author's content, while 14% are positively disposed to such a possibility. Young people (14-18 and 19-29 years old) are more open to the paid content (33% and 36% respectively).
- Most respondents prefer to watch movies/TV series (72%), listen to music (69%) and read news (63%) online. At the same time, demand for educational (37%) and analytical content (24%) is much lower.
- Among those who watch movies and TV series online, only 19% pay for subscriptions to video streaming services. The situation is similar with music content, 18% of listeners use paid services. The share of users paying for content is slightly higher among gamers (21%), consumers of online educational content (20%), and among readers of books and podcasts (19-22%).
- The highest potential willingness to pay is observed among book readers (23%), online educational content consumers (22%) and podcast listeners (17%), with the vast majority preferring free content sources.

Social Networks and Messengers:

- Messengers remain the most popular channel of online communication among respondents (72%), social networks take second place (62%). It is noted that 8% of the audience did not communicate online at all in the month prior the survey.
- As for social networks, Instagram is the most popular among respondents, with usage share of 83%. It is followed by Telegram (45%), Tik-Tok (43%) and YouTube (41%). VKontakte and Odnoklassniki are less popular among respondents (25% and 17% respectively), Facebook is used by 17% of respondents. Other social platforms have a small share of usage, ranging from 1% to 13%.
- As for messengers, WhatsApp is the absolute leader and is used by all respondents (100%). It is followed by Facebook Messenger and Skype (7% each), while Viber, IMO and other apps have a much smaller share of usage (3% or less).
- The below mentioned changes can be seen in behavior of the audience on social networks:
  - Watching video content is growing in popularity, increasing from 51% in 2021 to 56% in 2023, driven by a strong buildup of video content on platforms such as Tik-Tok, Instagram Reels and YouTube Shorts.
  - Commenting on posts is declining, from 32% in 2019 to 24% in 2021 and 20% in 2023.
  - Practical use of social networks for shopping and service ordering is growing, increasing from 15% in 2019 to 29% in 2023.
  - Some behavior patterns remain stable, such as posting photos and videos (about 33-34%) and reposting (20-22%).

Credibility to Mass Media:

- Television still has the greatest credibility, it was chosen as a priority channel by 36% of respondents; informational web sites (23%) take the second place. Despite the fact that the majority of Kazakhstanis use social networks (62%) and messengers (72%), only 3% trust them.
- Analyzing credibility to social networks and messengers, one can say that Instagram and WhatsApp enjoy equal trust (38% each). Telegram (19%) and YouTube (15%) follow with a huge gap. Level of credibility to Instagram is higher among women (47%) than among men (29%). WhatsApp is also more trusted by the female audience (41%) compared to the male one (34%). Telegram has a higher level of trust among young people (30% in the group aged 14-18) and lower trust among older age groups (13-14% in the group aged 46-65).
- In 2023, 54% of respondents trust state media, while trust in private media is only 9%. Credibility to national media increased from 36% in 2021 to 49% in 2023, while credibility to local regional media decreased from 20% to 13%. Trust in domestic media increased from 43% in 2021 to 57% in 2023, while trust in Russian and foreign media decreased from 11% to 5% and from 9% to 4%, respectively. Despite this, about a third of respondents do not trust any type of media.

- Over the past two years, according to 28% of respondents, Kazakhstani media have become more objective in their coverage of events, while 55% believe that nothing has changed in this regard, and only 10% say that the objectivity of coverage has decreased.

Media Information Literacy. Critical Skills and Understanding of Internet Security Risks:

- Level of information literacy in Kazakhstan has declined: 45% of respondents are able to competently formulate searches online (49% in 2021), and 43% can analyze data from different sources (compared to 57% in 2021). The ability to distinguish objective information from opinion has also decreased from 32% to 27%.
- Young respondents aged 14-29 have higher skill levels compared to the older age group of 61-65. Women generally have higher media literacy and information skills compared to men.
- When assessing the level of media literacy and information culture, 84% believe that media should be responsible for information they submit, 77% know how to find the right data in different sources, and 79% understand the contradictory nature of information from different sources. However, some ethical and critical aspects of information evaluation were lower: 64% compare data from different sources, 62% identify advertising in media content, and 58% understand the importance of links when using other people's content on social networks.
- The most recognizable terms in information literacy were *financial fraud* and *fake news*, about 70% of respondents said they know these concepts. Understanding of such terms as *network addiction*, *propaganda* and *compromising information* was demonstrated by about 60% of respondents. Far fewer respondents are familiar with concepts of *social network algorithms* and *factchecking*, only about one third of the survey participants.
- Comparing the results of 2023 and 2021 surveys, one can notice a general decreasing dynamics of the population's awareness relating to key information literacy concepts. Over this period, there is a significant decrease in knowledge of such relevant terms as *misinformation* (from 68% to 53%), *compromising information* (from 75% to 62%), as well as *network addiction* (from 75% to 64%) and *propaganda* (from 73% to 63%). A number of other concepts are also little-known. Despite this, current awareness rates remain higher than in 2019.
- The majority of respondents (44%) perceive the events in Ukraine as military actions, 33% are uninformed about the situation, 8% consider it a special military operation, and 2% consider it measures aimed at denazification. Older respondents are more informed about events in Ukraine; share of those who view events in Ukraine as a war (50%) is higher among ethnic Kazakhs than among Russians (31%). Russians are more likely to report being uninformed (41%).
- 46% of respondents in Kazakhstan have experienced different media coverage of the same political events, while 48% have not. Compared to 2021, the share of those who have experienced different coverage decreased from 64% to 46%. Radio and print media were more likely to create a contradictory perception of political news (59% and 55%, respectively), while users of social networks and websites are faced with diverse coverage in a lesser degree (52% and 50%). Those who learn information from other people (45%) and from TV programs (44%) were least likely to be influenced by contradictory political news.
- When faced with contradictory political news coverage in Kazakhstan, 42% of respondents do not undertake any actions, 26% compare data from different sources, 17% ask the opinion of others, and only 5% share their observations on social media. Compared to 2021, the share of those who remain indifferent increased from 31% to 42%.
- 31% of respondents often or constantly feel deception when receiving information from the media, 61% rarely encounter bias in the media. Comparing with the data of 2021, we can see a decrease in the share of those who often feel deceived (from 40% to 31%) and an increase in the share of those who rarely encounter bias (from 52% to 61%).
- In case of doubts about information on the media, 54% of respondents search for more additional information online, 22% turn to other media, 21% trust the opinion of their inner circle, and 29% refuse to check. Comparing to data 2019, we can see an increase in those who verify information online (from 35% to 54%) and turn to other sources (from 21% to 22%), as well as a decrease in those who refuse to verify (from 44% to 29%). The tendency to actively verify information is more pronounced among young people (14-29 years old).
- 77% of respondents are aware of the existence of both state and private media. However, 39% believe that only state media provide quality content. Regarding digital security, 71% know the risks of publishing personal information online, but 19% are ready to share confidential data with third parties. Regarding online anonymity, 63% realize that personal data is collected, but 36% believe that the internet allows them to remain anonymous.
- Most respondents (51%) know how to delete their online activity history, but only 14% do it regularly. Other basic security skills, such as changing passwords (49%), deleting unnecessary files (45%), privacy settings on social

networks (43%) and scanning the computer for viruses (42%), are also known for respondents, but only 13-18% apply them in practice.

- Only about a third of the audience have advanced online security skills. These include creating multiple accounts (38%), assessing personal data protection when using Internet services (37%) and detecting Internet fraud (36%). However, only 6-9% use these tools regularly. Comparing with data for 2021 and 2019 yy., there is an increase in the possession of advanced security skills. For example, the percentage of users able to create multiple accounts jumped from 18% to 38%, and share of those able to detect internet fraud went up from 18% to 36%.
- Only 4% of the audience contacted media outlets to clarify information or express complaints. This figure is down from 9% over the past four years.
- Audience share participating in interactive media formats remains low at just 8%. This level of engagement has remained actually the same in recent years, indicating the limited use of dialog formats in the media.

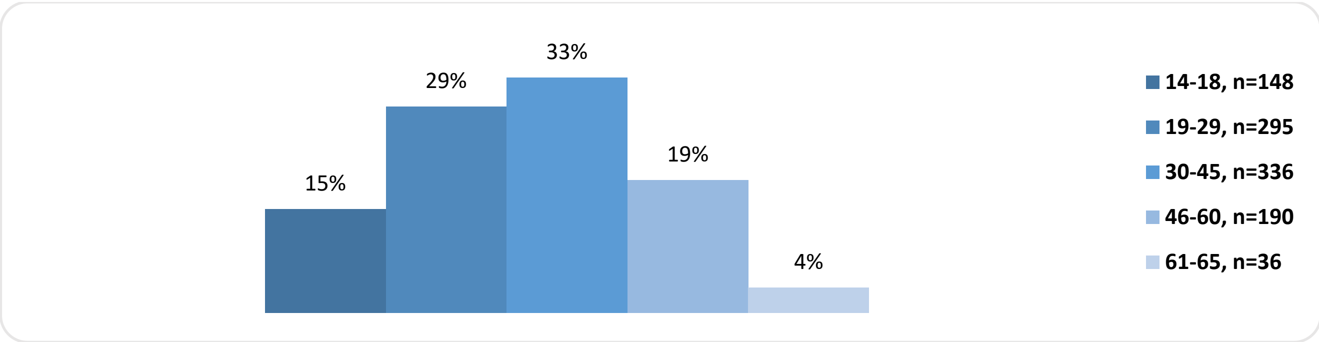
2. TAJIKISTAN

2.1. Socio-demographic Parameters of Respondents

The study involved **1005** (**one thousand five) respondents** distributed into 5 age groups:

- **14-18 years:** 148 respondents (15%)
- **19-29 years:** 295 respondents (29%)
- **30-45 years:** 336 respondents (33%)
- **46-60 years:** 190 respondents (19%)
- **61-65 years:** 36 respondents (4%)

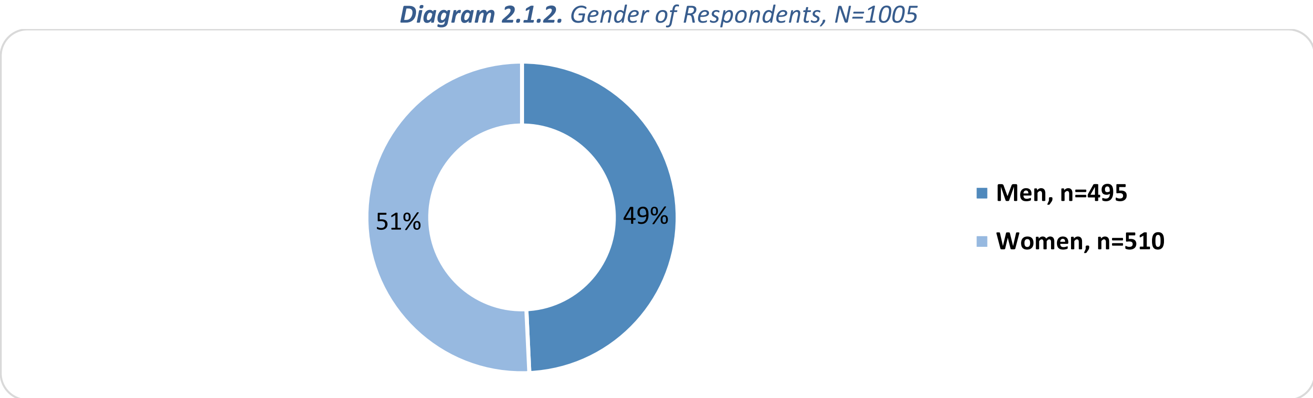
Diagram 2.1.1. *Age Demographic of Respondents (N=1005)*



Thus, middle-aged and young respondents prevail in the sampling which allows to cover the main age segments of the survey's target audience. Distribution of respondents by age groups corresponds to the countrywise statistics and ensures the representativeness of the sample.

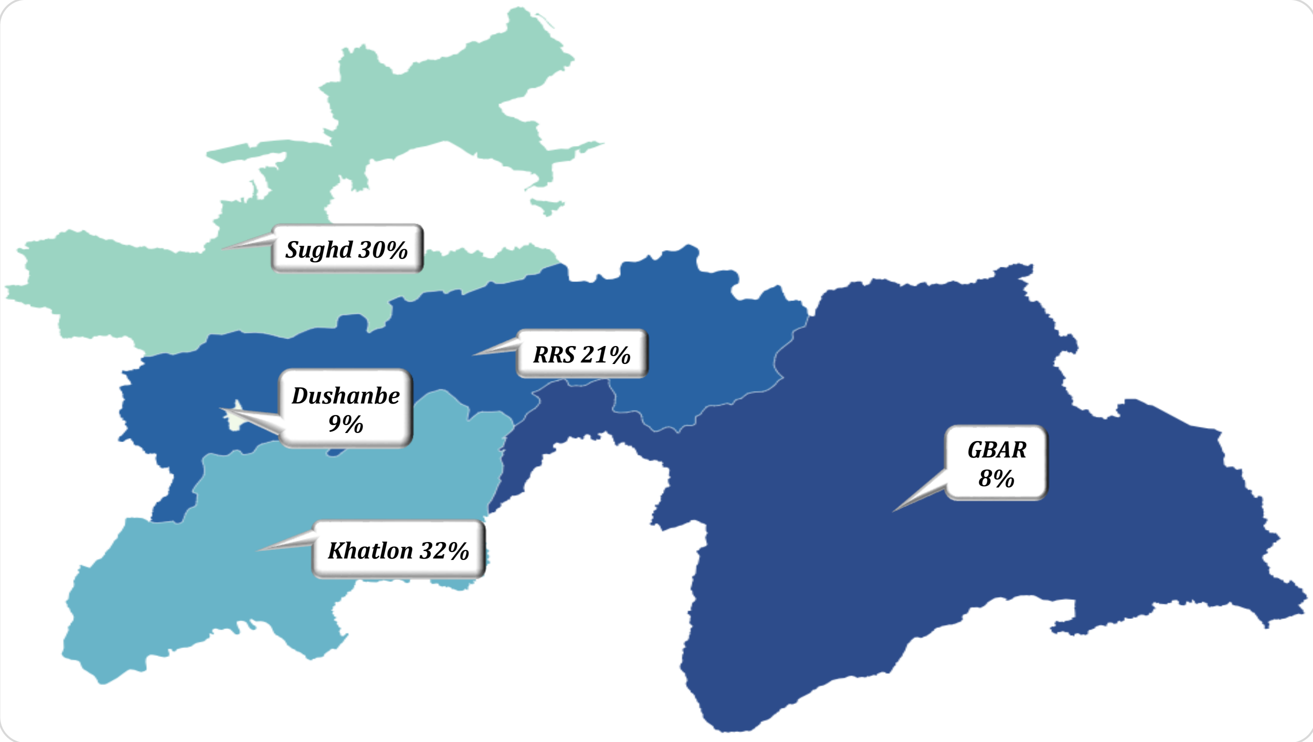
In terms of gender, male and female respondents are represented in the research in roughly equal proportions: 495 men (49%) and 510 women (51%). This distribution is close to even, which ensures gender balance of the sampling.

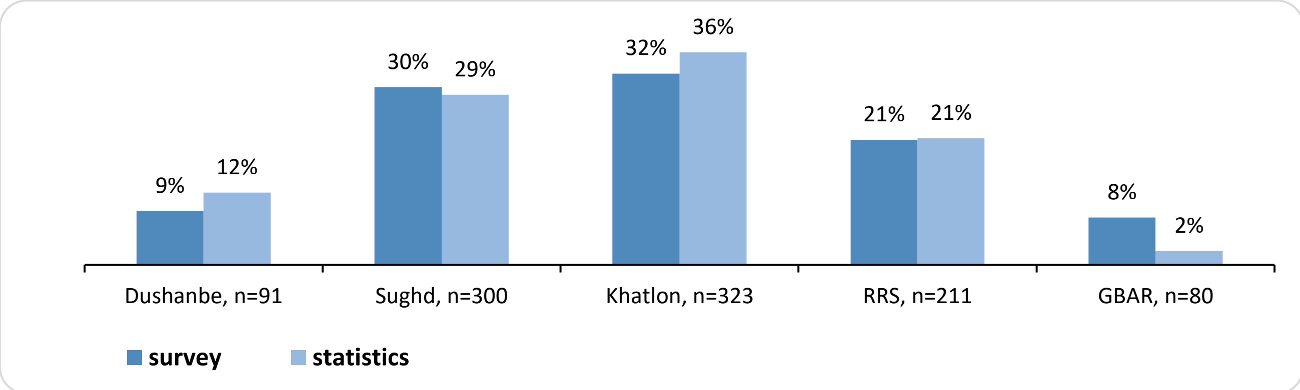
Diagram 2.1.2. *Gender of Respondents, N=1005*



Residents of urban areas accounted for approximately 28% (285), while residents of rural areas accounted for 72% (720) of the total number of respondents. Allocation of quotas by regions was based on official statistical data of the country, that ensures the representativeness of the sample.

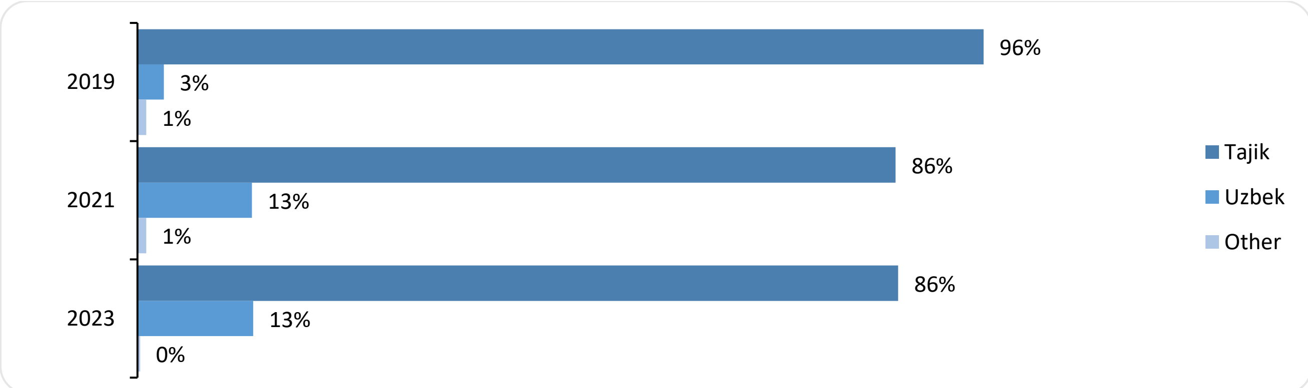
Diagram 2.1.3. Regional Distribution of Respondents, N=1005





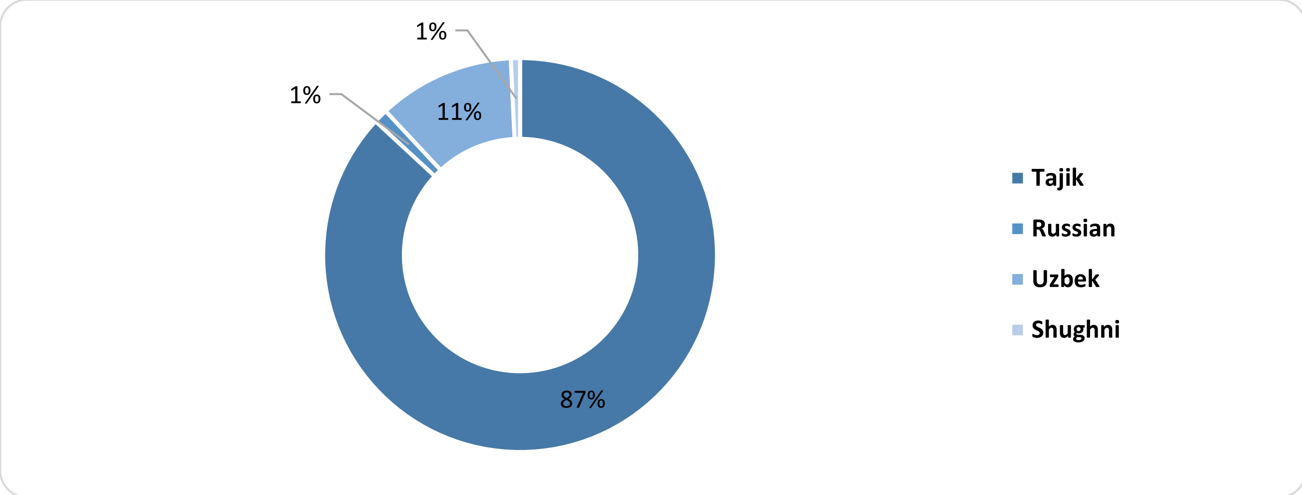
The vast majority of respondents over the years are Tajiks, ranging from 86% to 96%. The share of Uzbeks increased from 3% in 2019 to 13% in 2021 and remained at this level in 2023. The share of other nationalities decreased from 1% in 2019 to 0% in 2023.

Diagram 2.1.4. Ethnic Composition of Respondents, N=1005



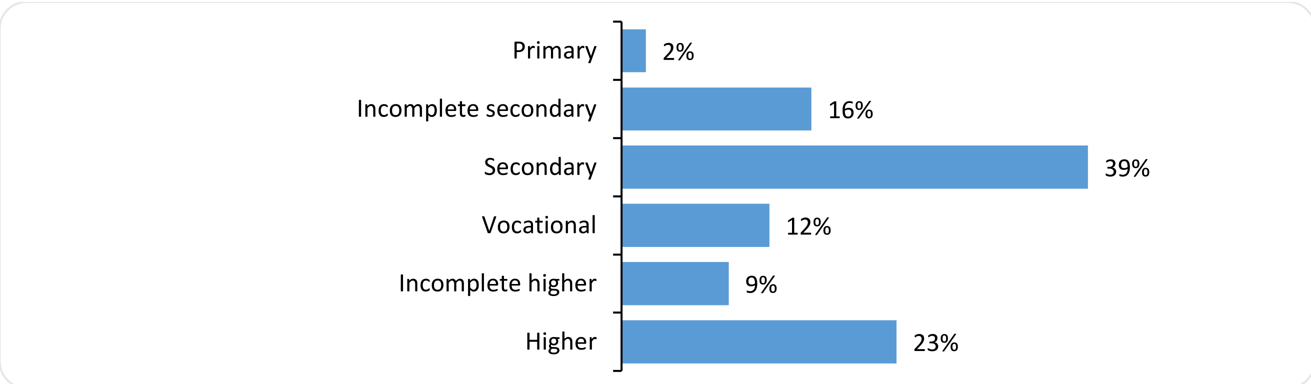
The overwhelming majority of respondents (87%) speak Tajik at home. 11% prefer to communicate at home in Uzbek. Russian and Shughni are used at home as languages of communication by only 1% of respondents, respectively.

Diagram 2.1.5. *Language Preference, N=1005*



The majority of respondents have secondary education - 39%, fairly large number of respondents have higher education - 23%, incomplete secondary education - 16%, vocational education- 12%, and incomplete higher education - 9%. A small proportion of respondents have only primary education - 2%.

Diagram 2.1.6. *Educational Level of Respondents, N=1005*



The largest share (37%) answers that they have enough money for food and clothes, but not for large household appliances. This indicates that the majority of the population can meet basic needs, but have difficulty buying expensive things. 30% state that they can buy household appliances but not a car; it is a middle class. 16% state that they have enough for food, but buying clothes is a problem. Only 6% state that they have no financial difficulties at all. 3% answer that they do not have enough money even for food.

Compared to previous years:

There is a positive trend among those who do not have enough for large household appliances, their share decreased from 41% in 2021 to 37% in 2023. Additionally, the share of people who have enough only for food has increased from 8% to 16%. The share of people who refused to answer decreased from 4% to 2%. This could mean an increase in confidence in the surveys. The share of wealthy people increased insignificantly, from 5% to 6%.

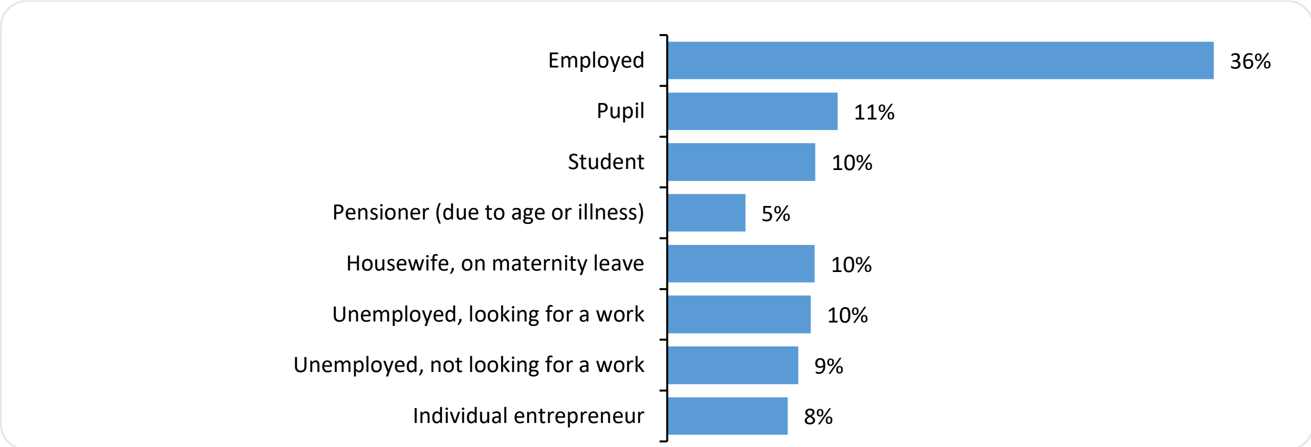
Table 2.1.1. *Financial Condition of Respondents*

	2019	2021	2023
We have enough to buy food and clothing but it will be difficult for us to buy a TV, refrigerator or washing machine	34%	41%	37%
We can by the necessary household appliances but we can`t afford to buy a car	25%	14%	30%

We have enough money to buy food but to buy clothes for us is a serious problem	6%	22%	16%
We have enough money for everything (expensive clothing, car, etc.), except for expensive purchases such as an apartment or a country house	10%	5%	6%
We do not have any financial difficulties. If necessary, we can buy an apartment or a house	3%	5%	6%
We do not always have enough money even for food	2%	8%	3%
Don`t want to answer	22%	4%	2%

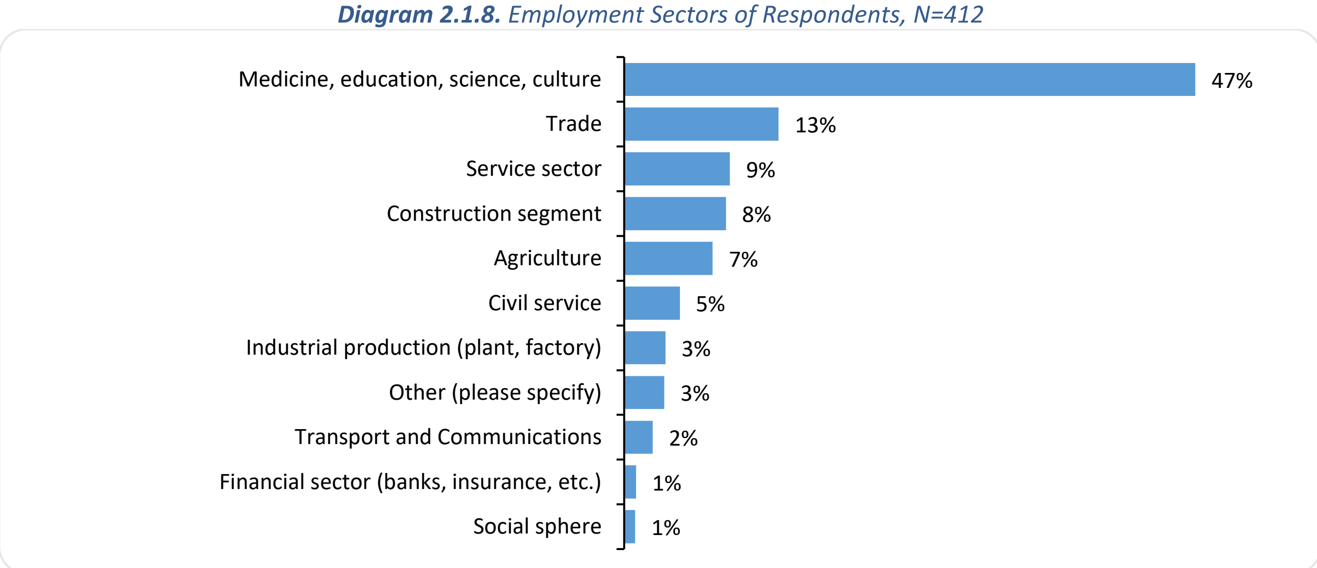
The largest share (36%) are employed and working respondents. This is a positive indicator. A significant part (11%) is represented by schoolchildren, students make 10%. A small percentage (5%) is represented by pensioners. Housewives and women in maternity leave make 10%. The share of unemployed respondents looking for a job is the same - 10%. 9% of respondents are unemployed who are not looking for a job. This is a disturbing pattern. 8% of respondents are individual entrepreneurs.

Diagram 2.1.7. *Social Status of Respondents, N=1005*



The majority of respondents (47%) work in the field of medicine, education, science and culture. This is the most numerous group. The second largest group is trade sector with 13%. Then follows the service sector with 9%.
Nearly as many (8%) work in construction segment. 7% are employed in agriculture sector. 5% of respondents work in the civil service. Industrial production and other spheres account for 3% each. The least number of respondents is employed in transportation, communications, finance and social sphere - 1-2% each.

Diagram 2.1.8. *Employment Sectors of Respondents, N=412*



2.2. Media Consumption: Main Sources, Preferences, Consumption Language

Information Sources

In Dushanbe, the main source of information is television (84.1%), as well as web sites (42.5%) and social networks (28.1%). In Sughd Province, television is the leading source of information (83.9%), with a significant role of oral communication (43.7%). Internet media are used less (41% websites, 14.4% social networks). In Khatlon Province, the overwhelming majority (95.9%) indicated television as the main information source. Oral sources (53.7%) and print media (37.3%) are also important. Internet is in poor request. The picture is similar in RRS, television (82.5%), oral communication (28%), but the Internet is more widely and frequently used than in Khatlon (37.9% sites). In GBAR (Gorno-Badakhshan Autonomous Region) one can see that television (82%) and internet (40.6% sites, 33.3% social networks) prevail. The role of radio is higher (27.7%) than in other regions.

Table 2.2.1. *Main Sources of Information on Nationwide News, N=1005*

	Dushanbe, n=91	Sughd, n=300	Khatlon, n=323	RRS, n=211	GBAR, n=80
From other people, relatives, friends, acquaintances or colleagues	17%	44%	54%	28%	17%
From television broadcast	84%	84%	96%	83%	82%
From radio broadcasting	8%	19%	24%	12%	28%
From newspapers, magazines	10%	16%	37%	28%	28%
From web sites	43%	41%	23%	38%	41%
From social networks	28%	14%	6%	31%	33%

Active use of both traditional media (television - 90%, print media - 21%) and new Internet resources (websites - 34%, social networks - 19%) is typical for young people aged 14-18. Communication with friends and relatives plays an important role. For respondents aged 19-29, the picture is similar with a slight predominance of the Internet (websites - 43%, social networks - 17%) over the press. Personal communication plays also a major role. In the middle age group of 30-45 years old, the importance of television and the press remains, while the role of Internet resources decreases. Interpersonal communication is at the same level. Respondents aged 46-60 are focused mainly on television (93%) and print media (33%). Internet sources are used much less (20% websites). Respondents over 61 years old rely on TV (98%) and print almost nationwide. The role of the Internet and social media is low.

Comparing by years, there is an increase of importance of TV in all groups, especially among young people aged 14-18 (from 80% in 2019 to 90% in 2023). Internet use by youth has also increased compared to 2019. Print media is used more frequently by older respondents aged 46-65. Radio is losing its popularity, except for the older group (61-65 yrs).

Table 2.2.2. *Main Sources of Information on Nationwide News, N=1005*

	Year	14-18	19-29	30-45	46-60	61-65
Other people, relatives, friends, acquaintances or colleagues	**2023**	**45%**	**44%**	**38%**	**33%**	**46%**
	2021	19%	16%	22%	21%	18%
	2019	48%	40%	45%	55%	45%
Television broadcast	**2023**	**90%**	**84%**	**86%**	**93%**	**98%**
	2021	74%	70%	78%	86%	90%
	2019	80%	74%	72%	80%	76%
Radio broadcasting	**2023**	**13%**	**16%**	**21%**	**19%**	**28%**
	2021	13%	13%	24%	27%	24%
	2019	17%	20%	24%	26%	35%
Newspapers, magazines	**2023**	**21%**	**24%**	**24%**	**33%**	**43%**
	2021	17%	15%	15%	26%	27%
	2019	16%	16%	16%	15%	24%
Web sites	**2023**	**34%**	**43%**	**37%**	**20%**	**8%**
	2021	42%	52%	41%	25%	12%
	2019	35%	44%	33%	21%	14%
Social networks	**2023**	**19%**	**17%**	**18%**	**16%**	**5%**

	2021	21%	20%	16%	7%	4%
	2019	15%	14%	12%	10%	10%

In 2023, the main source of information for the population of Tajikistan is television (88%). Communication with family members also plays an important role (40%). Print media are used by 26% of respondents, Internet sites - 34%, social networks - 17%.

Comparing with previous years, one can note the strengthening of the role of television: if in 2019, 75% of respondents relied on it, then by 2023 this share increased to 88%. At the same time, the importance of radio has decreased. The use of the Internet remains stable, with slight fluctuations by year. There has been a marked increase in interest in print publications, from 16% in 2019 to 26% in 2023. This may reflect an increased demand for quality analytical content, which is more commonly found in newspapers and magazines. Overall, both traditional media (TV, radio, print) and new media (internet, social media) have maintained their positions over the three years.

Table 2.2.3. *Main Sources of Information on Nationwide News, N=1005*

	2019	2021	2023
Other people, relatives, friends, acquaintances or colleagues	45%	↓ 19%	↑ 40%
Television broadcast	75%	↑ 77%	↑ 88%
Radio broadcasting	22%	↓ 19%	↓ 18%
Newspapers, magazines	16%	↑ 18%	↑ 26%
Web sites	35%	↑ 41%	↓ 34%
Social networks	13%	↑ 16%	↑ 17%

Usage of Mass Media and Media Technologies

Analysis of data for 2023 shows that the most popular daily activity is watching TV (76% of respondents). Also, the vast majority (79%) is using the cell phones every day. Fairly large number of people (26%) read social media. About a quarter of respondents read paper books every day. Less popular are activities such as listening to the radio and reading newspapers and magazines.

Comparing with previous years, there is a steady increase in TV content consumption (from 59% in 2019 to 76% in 2023). The share of daily reading of paper books increased (from 13% to 25%). At the same time, the use of desktop computers and laptops has decreased (from 25% to 14%), as well as taking photos and videos. Internet use remains stable. Thus, by 2023, television and mobile communication have strengthened their positions in everyday life of the population of Tajikistan.

Analysis of data for 2023 shows that the vast majority of respondents watch TV and use the Internet (only 2% and 5%, respectively, do not take these actions). The use of computers, gadgets and e-reading is growing. The lowest share (37% and 36%) is those who do not read print newspapers and books at all.

Comparing by years, the proportion who does not watch TV has fallen from 19% in 2019 to 2% in 2023. There is persistently high proportion of people who use videos and Internet. One can also see a decrease in those who do not use computers and gadgets. The proportion who do not read paperback books has increased from 22% to 36%.

Table 2.2.4. *Usage Frequency of Mass Media and Media Technologies*

	Daily or almost daily			Never		
	2019	2021	2023	2019	2021	2023
Watch TV	59%	70%	76%	19%	4%	2%
Watch video records (CDs, videotapes)	22%	11%	13%	19%	60%	60%
Listen to the radio (at home, in car, on public transport, etc.)	12%	19%	16%	46%	51%	45%
Use computers, laptops, tablets	25%	17%	14%	33%	66%	69%
Go online using any device	20%	44%	40%	33%	24%	44%
Be using the cell phone/smartphone	74%	81%	79%	4%	12%	5%
Read newspapers and magazines (paper editions)	12%	10%	14%	29%	50%	37%
Read newspapers and magazines, web sites (digital and/or online format)	6%	8%	9%	50%	75%	73%
Read social media	-	-	26%	-	-	55%

Listen to audio records (mp3, mp2, IPod, including podcasts, music and books)	31%	25%	23%	19%	57%	56%
Take photos from any device	13%	13%	9%	29%	49%	49%
Make videos	6%	8%	5%	39%	61%	63%
Read book (print)	22%	13%	25%	22%	45%	36%
Read books (e-books)	7%	6%	8%	48%	76%	77%

Analyzing the data on creation of different types of video content, the following trends can be singled out:

- the most popular is creation of family videos, 12% of respondents make them daily or almost daily, 36% - once a week;
- entertainment videos for social networks (TikTok, Instagram) are filmed regularly by only a small part of the survey participants - 5% daily, 8% weekly;
- very rarely or never respondents make videos on socially important topics, such as solving urban/rural problems or protecting rights and laws;
- educational videos and video blogs on various topics are also not popular, only about 5% create them regularly.

Table 2.2.5. *Topics of Personal Video Shootings Among Respondents*

	Daily or almost daily	One or more times per week	One or more times a month	Less often than once a month	Never
Family videos (kids, holidays, family events, etc.)	12%	36%	28%	21%	3%
Entertaining videos for Tik-Tok, Instagram	5%	8%	6%	4%	76%
Videos about social problems of a city/village aiming herewith to solve the issue	2%	3%	2%	4%	88%
Videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	1%	1%	2%	3%	92%
Educational videos, advices, coaching	5%	8%	8%	7%	71%
Videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	4%	4%	4%	5%	82%

Analyzing the data on creation of different types of video content by age groups, the following trends can be identified:

- family video is equally popular among all ages, about 24-25% of respondents shoot it;
- entertainment videos for social networks are more often created by young people aged 14-18 (8%). With the age, this share decreases to 3-6%;
- videos about socially important topics (city problems, protection of rights) are alsmost not made in any age group. Only 2-3% mentioned this activity;
- educational videos and video blogs are slightly more popular among young people aged 14-18 (6-8%), while in older groups this figure drops to 2-4%.

Table 2.2.6. *Topics of Personal Video Shootings Among Respondents*

	14-18, n=77	19-29, n=132	30-45, n=117	46-60, n=64	61-65, n=5
Family videos (kids, holidays, family events, etc.)	24%	24%	24%	25%	25%
Entertaining videos for Tik-Tok, Instagram	8%	6%	3%	6%	5%
Videos about social problems of a city/village aiming herewith to solve the issue	3%	3%	2%	3%	0%
Videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	3%	2%	1%	3%	0%
Educational videos, advices, coaching	8%	8%	7%	6%	7%
Videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	6%	5%	3%	4%	2%

Consumption Language

Analysis of data for 2023:
Most respondents prefer to watch TV (36%), listen to the radio (62%) and read print/online media (58%) only in Tajik. As for use of the Internet and social networks, there is a growing proportion of those who prefer Russian alongside Tajik. 39% choose content in both languages on the Internet, and 44% - on social networks.

Comparison between 2021 and 2023:
The share of those who consume content equally in both Tajik and Russian languages increased, for TV from 28% to 41%, Internet from 19% to 39%, social networks from 16% to 44%. The share of those who prefer only Tajik language decreased, for TV from 41% to 36%, radio from 63% to 62%, print/online media from 60% to 58%. Moreover, the share of those choosing content only in Russian decreased, for the Internet from 16% to 10%, social networks from 14% to 12%.

Table 2.2.7. *Information Consumption Language of Respondents*

	Year	Only in Tajik	More in Tajik than in Russian	In Tajik and Russian equally	More in Russian than in Tajik	Only in Russian
Watch TV	**2023**	**36%**	**10%**	**41%**	**6%**	**4%**
	2021	41%	7%	28%	7%	8%
Listen to the radio	**2023**	**62%**	**9%**	**21%**	**3%**	**2%**
	2021	63%	4%	19%	3%	5%
Read newspapers/magazines (print and online)	**2023**	**58%**	**6%**	**25%**	**4%**	**4%**
	2021	60%	5%	17%	5%	7%
Browse the Internet	**2023**	**29%**	**7%**	**39%**	**11%**	**10%**
	2021	25%	6%	19%	6%	16%
Use social media	**2023**	**24%**	**7%**	**44%**	**12%**	**12%**
	2021	31%	6%	16%	5%	14%

In 2023, when consuming media content, the population of Tajikistan prefers predominantly Tajik media. The most popular are republican Tajik radio stations (58%) and TV channels (68%). The share of regional and urban Tajik-language media is also noticeable. Russian sources play a major role in the Internet and print media, about 25% and 7% respectively. However, republican Tajik publications still dominate in the Internet (53%) and in the press (63%). The use of foreign media is insignificant.

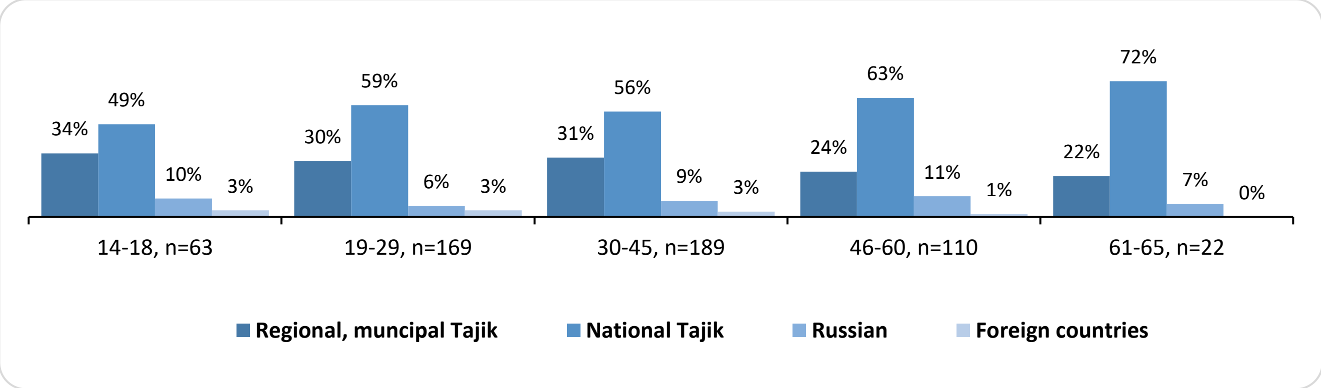
Comparing with 2021, there is a slight increase in the popularity of local Tajik media and a decrease in interest in Russian media. For example, the share of republican Tajik TV channels increased from 61% to 68%, while the share of Russian TV channels decreased from 20% to 13%. Similar dynamics can be seen for other types of media.

Table 2.2.8. *News Preferences: Breakdown by Country and Media*

	Year	Tajik regional, municipal	Tajik national	Russian	Foreign countries	Do not use
On the radio	**2023**	**29%**	**58%**	**8%**	**3%**	**2%**
	2021	26%	55%	12%	1%	0%
In newspapers / magazines	**2023**	**25%**	**63%**	**7%**	**2%**	**3%**
	2021	22%	58%	12%	2%	0%
On the web sites	**2023**	**11%**	**53%**	**25%**	**3%**	**5%**
	2021	7%	36%	28%	2%	0%
On TV	**2023**	**14%**	**68%**	**13%**	**4%**	**2%**
	2021	14%	61%	20%	1%	0%

As follows from the analysis relating to media preferences of different age groups in Tajikistan, one can describe the trends as below. With the age, preference for republican Tajik media grows; if the group of respondents aged 14-18 makes 49%, then the group aged 61-65 makes 72%. At the same time, the share of those who prefer regional and urban Tajik media decreases with the age, from 34% in the youngest age group to 22% in the oldest. Preferences for Russian media remain relatively stable across all ages and range from 6% to 11%. Foreign media are the least popular, especially in the older age groups, their share does not exceed 3%. Thus, as the audience grows older, it increasingly prefers republican Tajik media, while interest in local and foreign sources of information decreases.

Diagram 2.2.1. *Preferences by Country/Region When Listening to News and Analytical Programs on the* ***Radio***

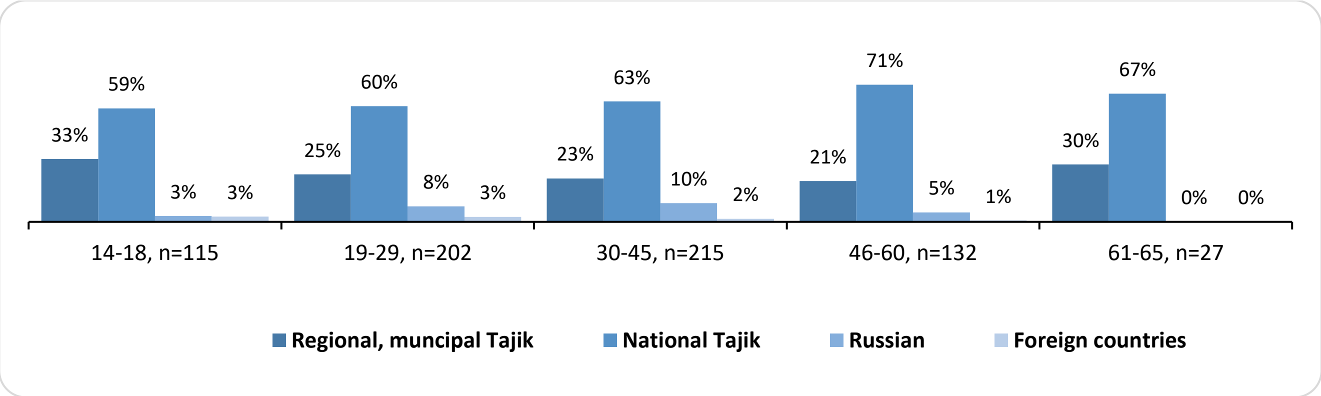


Analysis of data on media preferences (newspapers/magazines) of different age groups in Tajikistan has shown the following dynamics:

- the share of national Tajik media generally increases with the age, from 59% in the 14-18 age group to 71% in the 46-60 age group;
- at the same time, preference for regional and urban Tajik media remains relatively stable at all ages at the level of 21-33%;
- as for Russian media, their share grows from 3% among the youngest respondents to 10% in the middle age group, and then declines back to 0% among the older generation;
- interest in foreign media also decreases with the age and does not exceed 3% in any age category.

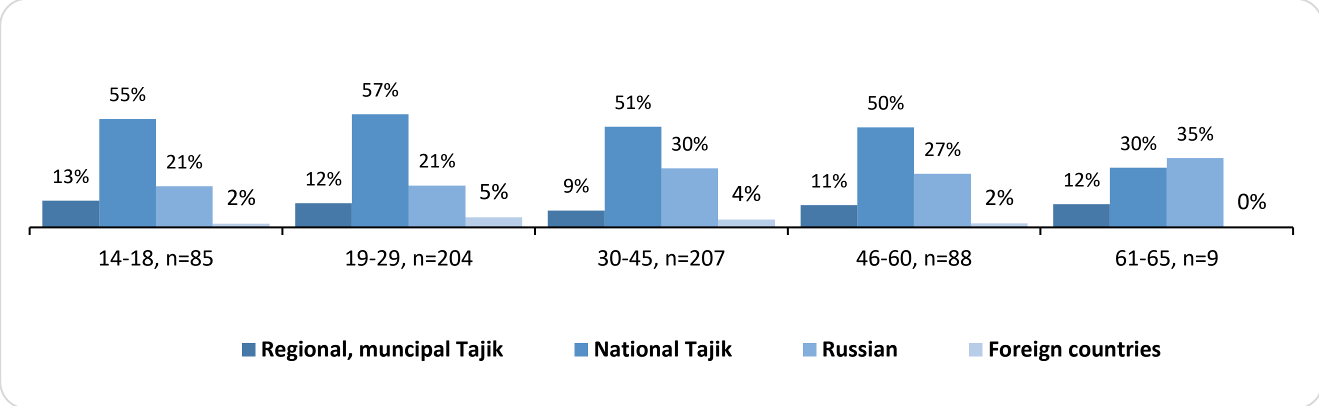
In general, there is a tendency of increasing preference for republican Tajik media (in newspapers/magazines) and decreasing interest in Russian and foreign sources of information as the audience grows older, while loyalty to local media remains stable.

Diagram 2.2.2. *Preferences by Country/Region When Reading News and Analytical Articles* ***in Newspapers and Magazines***



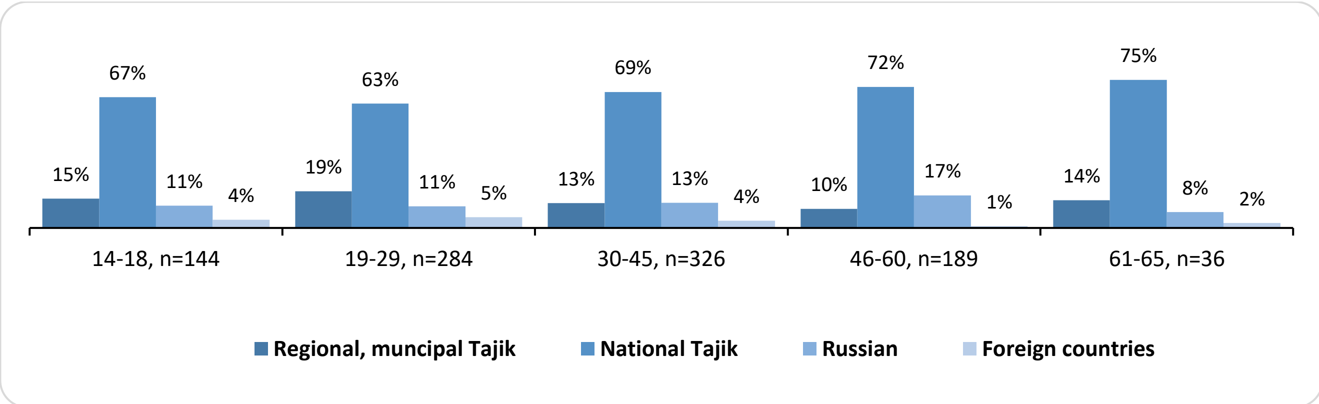
Analysis of data on media preferences (**on Internet sites**) of different age groups in Tajikistan has shown that the share of online regional and urban Tajik media remains consistently low (9-13%) at all ages. The preference for republican Tajik media on Internet sites is also fairly stable (50-57%) in all age groups, except for a sharp decrease to 30% among respondents aged 61-65. At the same time, there is an upward trend in interest in Russian media from 21% in the younger group to 30% in the middle age group and further to 35% in the older group. The share of foreign media remains low (0-5%) without pronounced age dynamics.

Diagram 2.2.3. Preferences by Country/Region When Reading News and Analytical Articles on the Internet



Analysis of data on media preferences (**on TV**) of different age groups in Tajikistan has shown that the share of national Tajik media remains stably high at all ages (63-75%) with a slight upward trend with the age. The preference for regional and urban Tajik media varies from 10% to 19%, without pronounced dynamics by age. Interest in Russian media on TV is relatively stable in younger groups and shows a slight increase in middle and preretirement age (up to 13-17%), and then decreases again in the elderly. The share of foreign media remains low (1-5%) without pronounced age preferences. In general, one can see high loyalty of the audience to the republican Tajik media at all ages and a slight increase in interest in Russian media in the middle age group. Preferences for local and foreign media remain relatively stable.

Diagram 2.2.3. Preferences by Country/Region When Watching News and Analytical Programs on TV



2.3. TV Broadcast

Analysis of data for 2023:

The most popular TV channels are TV Tojikiston (46%) and TV Safina (50%). Jahonnamo (31%), Shahnavoz (13%), TV Bahoriston (18%) also have high ratings. Less popular are regional TV channels (TV Sughd, TV Khatlon, TV Badakhshan) and sports channels (Varzish TV, Football).

Comparison with 2021:

Ratings of TV Tojikiston and TV Safina channels remained stable. The ratings of Jahonnamo (from 52% to 31%), Sinamo (from 35% to 28%) and sports channels decreased significantly. The rating of metropolitan Dushanbe TV also dropped significantly (from 29% to 2%). The rating of TV Bahoriston declined, too (from 26% to 18%).

Table 2.3.1*. The Most Popular Tajik TV Channels Watched by Respondents in the Last Week*

	2021, N=1063	2023, N=979
TV Tojikiston	46%	= 46%
TV Safina	51%	↓ 50%
Sinamo	35%	↓ 28%
Jahonnamo	52%	↓ 31%
Varzish TV	22%	↓ 14%
TV Bahoriston	26%	↓ 18%
Football	8%	↓ 5%
Shahnavoz	15%	↓ 13%
TV Sughd	10%	↓ 8%
TV Khatlon	13%	↓ 7%
TV Badakhshan	7%	↓ 2%
Asia	-	2%
Dushanbe	29%	↓ 2%
Did not watch Tajik TV channels in the last week	**-**	**6%**

Analyzing the data on the popularity of Russian TV channels in Tajikistan, the following trends can be noted:

- state channels Russia 1 (22% of the audience) and NTV (17%) are leading among Russian media in 2023;
- evident attention is also paid to entertainment channel TNT (10%) and information channel Russia 24 (11%);
- at the same time, almost half of respondents (49%) did not watch Russian channels at all in the last week;
- compared to 2021, the share of those who ignore Russian TV has increased (from 37% to 49%);
- among regular viewers, there is a growing interest in the state-run channels Russia 1 and NTV;
- rating of the Channel One has fallen sharply, and attention to entertainment media has decreased.

Table 2.3.2. *The Most Popular Russian TV Channels Watched by Respondents in the Last Week*

	2021, N=1063	2023, N=979
NTV	12%	↑ 17%
TNT	9%	↑ 10%
Russia 1	16%	↑ 22%
TV-3	4%	= 4%
Match TV	6%	↓ 5%
Channel One	19%	↓ 6%
Russia 24	11%	= 11%
STS	7%	↓ 4%
Zvezda	4%	↓ 2%
Pyatnitsa	3%	↓ 2%
Did not watch Russian TV channel in the last week	**37%**	**49%**

Analysis of data on the popularity of foreign TV channels in Tajikistan shows a sharp decline in the audience's interest in foreign content. In 2023, the vast majority of respondents (67%) did not watch foreign channels at all. The most popular channels among those who did turn to foreign TV are news channels like Euro News (8% of the audience), BBC (4%), and entertainment GEM TV (4%).

Compared to 2021, the share of those ignoring foreign media has increased to more than one and a half times (from 37% to 67%). Insignificant audience growth is observed only for a few foreign channels of news and entertainment format. Interest in educational foreign channels has fallen.

Table 2.3.3. *The Most Popular Foreign TV Channels Watched by Respondents in the Last Week*

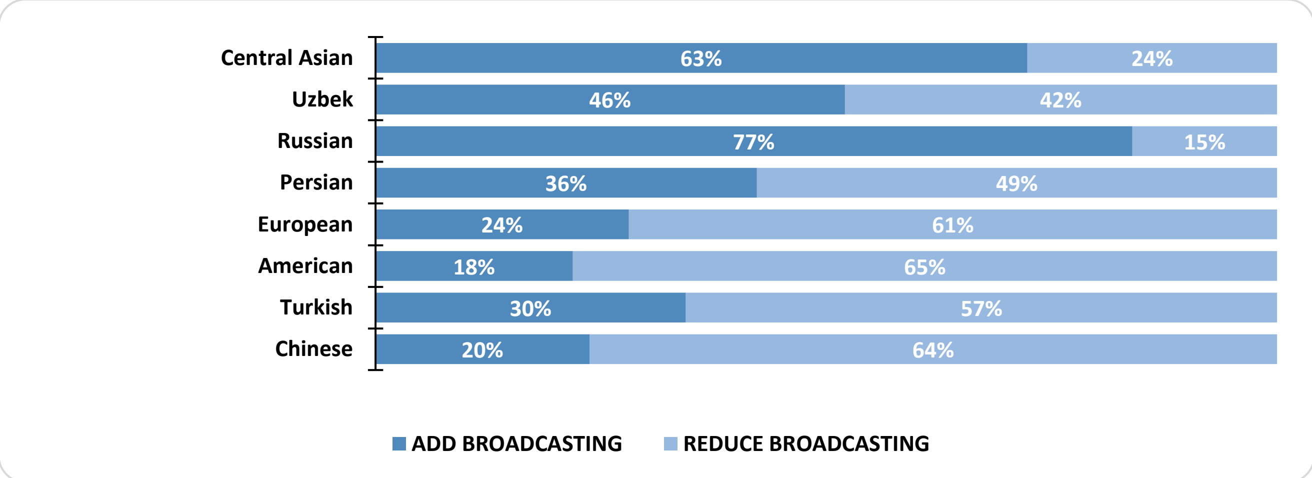
	2021, N=1063	2023, N=979
BBC	2%	↑ 4%
Nickelodeon	0%	↑ 1%
Disney	4%	= 4%
Euro News	5%	↑ 8%
Al Jazeera	-	0%
Discovery	3%	↓ 2%
National Geographic	1%	↓ 0%
CNN	0%	↑ 1%
ESPN	-	0%
India TV	2%	↑ 3%
GEM TV	2%	↑ 4%
Did not watch foreign TV channel in the last week	**37%**	**67%**

Analyzing the opinions of respondents on the desired broadcasting time of various foreign TV channels in Tajikistan, the following trends can be identified:

- the largest share of respondents support the expansion of broadcasting of Russian channels - 77%. Also, the relative majority favors increasing the volume of Central Asian (63%) and Uzbek (46%) content;
- at the same time, the predominant number of respondents would like to reduce the presence of European (61%), American (65%), Turkish (57%), Chinese (64%) and to a lesser extent Persian (49%) channels.

The population of Tajikistan is generally in favor of increasing the share of Russian and regional media on TV of the republic. However, the majority has opposed expansion of the presence of Western and some Eastern foreign media.

Diagram 2.3.1. *Media of Countries That Respondents Would Like to Add or Reduce in Tajikistan*



In 2023 the most popular content is news on Tajik central channels (65%), music programs (43%), and morning shows (42%). TV series (45%), sports (41%), entertainment programs (43%) are also in demand. Interest in educational (28%), children's (28%) and analytical programs (14%) increased.

Analyzing the dynamics of television preferences of the audience over three years, we can note the following main trends:

- persistently high interest in news of central Tajik TV channels, about 60-70% of viewers over the all years;
- reduced attention to news of foreign channels (from 38% in 2019 to 15% in 2023);
- increase in the popularity of morning shows, educational, children and analytical content by 2023 compared to 2019;
- stable demand for entertainment programs, TV series, music and sports programs for three years;

- decline in the audience for regional news by 2021 and a subsequent slight increase by 2023.

In general, one can see an increase in interest in information-analytical and educational programs of the Tajik TV amid decline in popularity of foreign news. Entertainment content also maintains a steady demand.

Table 2.3.4. *Respondents' Preferences, What They Usually Watch on TV*

	2019	2021	2023
News on local regional TV channels	69%	22%	42%
News on Russian TV channels	-	28%	32%
News on international TV channels	38%	14%	15%
Morning shows	18%	35%	42%
Entertainment (comedy) shows, telegames, completion shows	29%	28%	43%
Sportscast, broadcasting	29%	30%	41%
TV series and feature films	40%	48%	45%
Analytical programs, talk shows	5%	7%	14%
Educational shows	10%	9%	28%
Children's programs, animated cartoons	8%	19%	28%
Cooking shows	19%	26%	38%
Science TV shows, documentaries	14%	8%	17%
Music shows, concerts	35%	37%	43%
Religious programs	4%	3%	8%
Reality shows	5%	3%	6%
News on Tajik central TV channels	69%	59%	65%

2.4. Internet

Analyzing the Internet activity of users in Tajikistan in 2023, we can note the leading role of social networks (67%) and watching online videos (98% watch TV and 41% watch movies/TV series). Reading news online (54%), socializing and shopping (10% each) are also popular. Comparing to previous years, there is a significant increase in the consumption of video content on the Web: online TV viewing has increased from 14% in 2021 to 98% in 2023. Moreover, one can see a noticeable increase in online learning, from 7% to 17%. At the same time, the use of search engines and services for downloading content is decreasing. People are less likely to post their photos and videos online.

Table 2.4.1. *Online Activities of Respondents in the Last Month (as from the date of survey)*

	2019	2021	2023
Reading online news	49%	58%	54%
Social networking	51%	66%	67%
Watching TV series/ movies	34%	36%	41%
Using search engines (Yandex, Google, etc.)	33%	29%	26%
Downloading, music listening, watching video	32%	23%	26%
Posting personal photos and videos	25%	18%	10%
Reading books online	20%	16%	21%
Job search online	9%	9%	11%
Using cloud services (Yandex Disc, Google Disc, etc.)	6%	8%	10%
Purchasing goods, services, tickets online	6%	6%	10%
Personal blogging	3%	2%	5%
Applying for government services online	3%	2%	4%
Managing bank account online	3%	7%	12%
Personal financial management (including but not limited to credit facilities, mortgage loans, investments)	-	-	6%
Payment for goods/services with e-money (Yandex.Money, QIWI Wallet, Web Money, etc.)	3%	4%	5%
Studying online	-	7%	17%
Watching TV shows	-	14%	98%
Online work	-	6%	8%
E-participation in civic engagement (create/sign online petitions, participate in discussions about laws before they are passed)	-	1%	4%
Visiting thematic web portals (hobby, business, parenting)	-	6%	5%

Messengers in Dushanbe are the most popular (76%), followed by social networks (44%). The share of those who do not socialize online is relatively small (15%). In Sughd and RRS, messengers dominate (60%), followed by social networks (32-35%). A significant proportion (34% and 29%) do not use the Internet for communication. In Khatlon, the majority (58%) do not communicate online. Respondents prefer messengers (32%) and social networks (21%). In GBAR the popularity of messengers (55%) and social networks (54%) is high. The share of those who do not communicate online is only 6%.

Table 2.4.2. *Ways of Online Communication Used by Respondents in the Last Month as From the Date of Survey*

	Dushanbe, n=91	Sughd, n=300	Khatlon, n=323	RRS, n=211	GBAR, n=80	Total, n=1005
E-mail	10%	8%	4%	4%	19%	6%
Social networks	44%	32%	21%	35%	54%	31%
Audio- videoconferences	4%	1%	3%	1%	5%	2%
Messengers	76%	60%	32%	60%	55%	52%
Blogs, diaries	1%	1%	1%	0%	4%	1%
Did not communicate online	15%	34%	58%	29%	6%	39%

Based on the provided data, we can see that the most popular way of online communication in all age groups is messengers. 47% of respondents aged 14-18 use messengers, respondents aged 19-29 make 57%, middle-aged group (30-45 yrs) - 56%, and respondents aged 46-60 make 44%. The second most popular channel at all ages is social networks. Their use rises from 32% in 14-18 year old group to 38% in 19-29 year old group, and then drops to 30% among respondents aged 30-45 and 24% in the group aged 46-60. With the age, the share of those who do not use the Internet for communication at all increases. If in the 14-18 years age group such people make up 41%, then in the group of 46-60 years old they make 48%, and in 61-65 years old group- 66%.

Table 2.4.3. *Ways of Online Communication Used by Respondents in the Last Month as From the Date of Survey*

	14-18, n=148	19-29, n=295	30-45, n=336	46-60, n=190	61-65, n=36
E-mail	5%	7%	7%	5%	3%
Social networks	32%	38%	30%	24%	3%
Audio- videoconferences	1%	3%	2%	2%	0%
Messengers	47%	57%	56%	44%	31%
Blogs, diaries	2%	0%	1%	2%	0%
Did not communicate online	41%	30%	37%	48%	66%

YouTube (50%), Instagram (67%) and Telegram (44%) are the most popular. A significant share of the audience uses Facebook (43%). Less popular are VKontakte (17%), Odnoklassniki (17%), and Tik-Tok (17%). There is an insignificant audience on Twitter, Google+, LinkedIn. Moy Mir is practically not used (0%).

Comparison with data for 2021 shows:
Significant growth in popularity of Instagram (from 27% to 67%) and Telegram (from 17% to 44%). Notable growth in the audience of YouTube (from 37% to 50%) and Facebook (from 19% to 43%); stable positions of VKontakte, Odnoklassniki, Twitter, Google+; slight growth of Tik-Tok (from 7% to 17%); decrease in use of Moy Mir (from 1% to 0%).

Table 2.4.4. *Use of Different Social Networks for Online Communication in the Last Month as From the Date of Survey*

	2021	2023
VKontakte	11%	↑17%
Instagram	27%	↑ 67%
Facebook	19%	↑ 43%
Odnoklassniki	16%	↑ 17%
Tik-Tok	7%	↑ 17%
Telegram	17%	↑ 44%
YouTube	37%	↑ 50%
Twitter	2%	= 2%
Google+	14%	= 14%
LinkedIn	0%	↑ 1%
Moy Mir	1%	↓ 0%

In the 14-18 age group, Instagram (76%), Telegram (59%), YouTube (49%) are the leaders. In the group aged 19-29, Instagram (75%), Telegram (48%), YouTube (46%) dominate. too. In the 30-45 age group, Instagram (61%), Facebook (46%), YouTube (54%) are most popular. As for the group aged 46-60, the share Facebook (55%) is growing, while the share of Instagram (52%) and YouTube (48%) is decreasing. In the older group aged 61-65 Instagram and Telegram are not used, with Facebook and YouTube leading the way (100% each, but the sample is of 1 person).

The general trends are as follows:
- high popularity of Instagram in youth groups;
- increasing popularity of Facebook with the age;
- Telegram is popular with youth groups, less so with older groups;
- YouTube is popular at all ages.

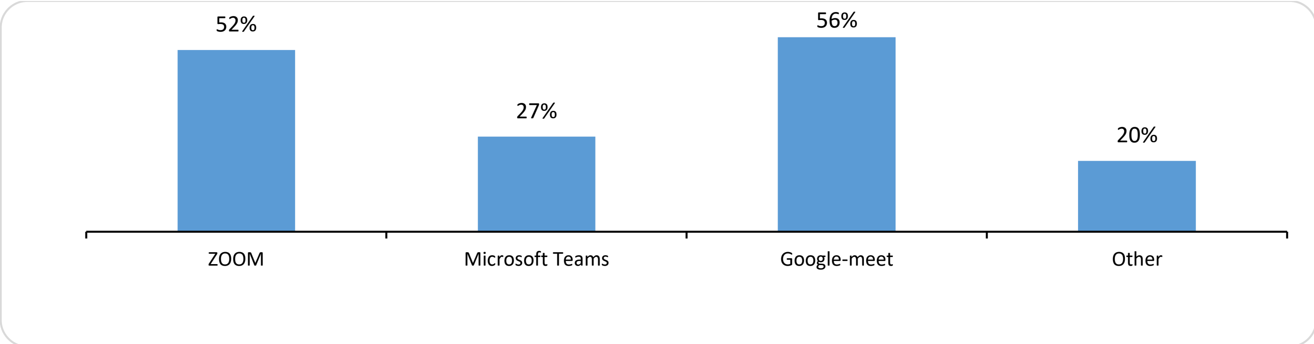
Table 2.4.5. *Use of Different Social Networks for Online Communication in the Last Month as From the Date of Survey*

	14-18, n=52	19-29, n=116	30-45, n=105	46-60, n=50	61-65, n=1
VKontakte	21%	20%	16%	7%	0%
Instagram	76%	75%	61%	52%	0%
Facebook	21%	44%	46%	55%	100%
Odnoklassniki	3%	20%	21%	16%	0%
Tik-Tok	20%	16%	18%	16%	0%
Telegram	59%	48%	38%	33%	0%

YouTube	49%	46%	54%	48%	100%
Twitter	0%	3%	3%	0%	0%
Google+	11%	15%	13%	19%	100%
LinkedIn	0%	2%	1%	0%	0%
Moy Mir	0%	1%	0%	0%	0%

The most popular platform is Google Meet, which is used by 56% of respondents. Zoom is the second most popular, used by 52% of respondents. Microsoft Teams is the least used platform, its share is 27%. A respectable number of respondents (20%) use other conference services which are not listed herein.

Diagram 2.4.1. *Use of Different Video Conferencing Services for Online Communication in the Last Month as From the Date of Survey*



WhatsApp is the leader in almost all regions, with its share ranging from 95% to 99%. The exception is GBAR, where it is slightly less popular (95%). IMO is the second most popular messenger in all regions. It is widely used in RRS (50%) and Khatlon (43%). Facebook Messenger is relatively popular in Dushanbe (21%), RRS (21%) and GBAR (56%). Viber is used predominantly in Sughd (26%), less frequently in other regions (10-17%). Skype and others are not widespread (1-6%).

Table. 2.4.6. *Use of Different Messengers for Online Communication in the Last Month as From the Date of Survey*

	Dushanbe, n=70	Sughd, n=182	Khatlon, n=103	RRS, n=127	GBAR, n=46	Total, n=528
WhatsApp	97%	96%	97%	99%	95%	97%
Skype	2%	1%	3%	0%	6%	1%
Viber	10%	26%	11%	10%	17%	16%
Facebook messenger	21%	20%	15%	21%	56%	20%
IMO	26%	41%	43%	50%	34%	41%
Other	**3%**	**1%**	**3%**	**1%**	**0%**	**2%**

Study of the popularity of messengers in Tajikistan in different age groups shows that the leading position is certainly held by WhatsApp, its share varies from 94% to 100% in all ages. The second most popular messenger is IMO, which is more popular among older groups aged 46-60 years old (51%), while among young people (14-18yrs) it is used by 32%. Facebook Messenger is more popular among respondents aged 14-29 (18-23%) than in older groups (around 19%). Viber and Skype occupy a small niche with the share of use within 1-20% at different ages.

Table 2.4.7. *Use of Different Messengers for Online Communication in the Last Month as From the Date of Survey*

	14-18, n=70	19-29, n=167	30-45, n=193	46-60, n=87	61-65, n=11
WhatsApp	100%	99%	94%	97%	100%
Skype	0%	1%	3%	0%	0%
Viber	13%	16%	15%	20%	9%
Facebook messenger	18%	23%	19%	19%	9%
IMO	32%	37%	46%	51%	9%
Other	**4%**	**1%**	**1%**	**1%**	**0%**

Analysis of data for 2021 and 2023 shows that use of mobile internet is predominant in Tajikistan. In 2023, 59% of respondents use it, compared to 66% in 2021. However, one can see a downtrend in the share of mobile Internet and an increase in the number of those who do not have internet access at all, 36% in 2023 vs. 28% in 2021. Only 1% of respondents have fixed internet, while 2% use a combination of mobile and fixed internet from different providers. In this regard, mobile internet remains the predominant method of Internet connectivity in Tajikistan, but there has been a downward trend in its share and an increase in the number of those who do not have internet access at all over the past two years.

Table 2.4.8. *Distribution of Internet Users with Different Connection Methods*

	2021	2023
ONLY mobile internet available	66%	59%
ONLY fixed internet available	1%	1%
Both mobile and fixed internet available , from different providers	4%	2%
Common tariff plan available (service package: mobile, fixed internet)	1%	1%
No internet access /exclusive/	28%	36%

Analysis of data 2023 by age groups shows as follows:
- in the groups of 14-29 years old, mobile internet is predominant (53-67%);
- in the groups aged 30-60, the share of mobile internet is lower (52-61%);
- respondents aged 61-65 have a higher proportion of those without internet access (65%);
- fixed internet and bundled tariffs are not widespread.

Comparison with 2021:
- percentage of mobile internet has decreased in all groups;
- percentage of those without internet access has increased, especially in the older groups;
- share of fixed internet and bundled tariffs remains low.

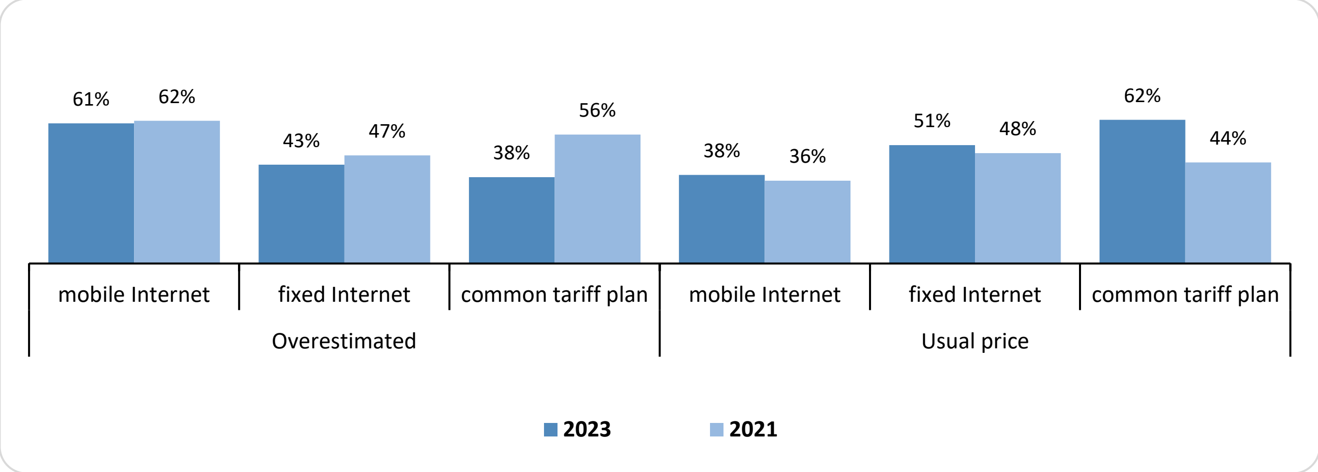
Mobile internet access prevails at all ages, although its share is declining. The number of respondents having no internet access is increasing, especially in the elderly. Fixed internet and bundled tariffs are not widespread.

Table 2.4.9. *Distribution of Internet Users with Different Connection Methods*

	Year	14-18	19-29	30-45	46-60	61-65
ONLY mobile internet available	**2023**	**53%**	**67%**	**61%**	**52%**	**31%**
	2021	66%	73%	67%	55%	39%
ONLY mobile internet available	**2023**	**1%**	**1%**	**2%**	**1%**	**1%**
	2021	3%	1%	1%	2%	0%
Both mobile and fixed internet available , from different providers	**2023**	**3%**	**3%**	**2%**	**2%**	**0%**
	2021	3%	6%	3%	1%	2%
Both mobile and fixed internet available , from different providers	**2023**	**1%**	**0%**	**1%**	**0%**	**0%**
	2021	1%	1%	1%	1%	0%
No internet access /exclusive/	**2023**	**40%**	**28%**	**34%**	**45%**	**65%**
	2021	27%	19%	28%	41%	59%

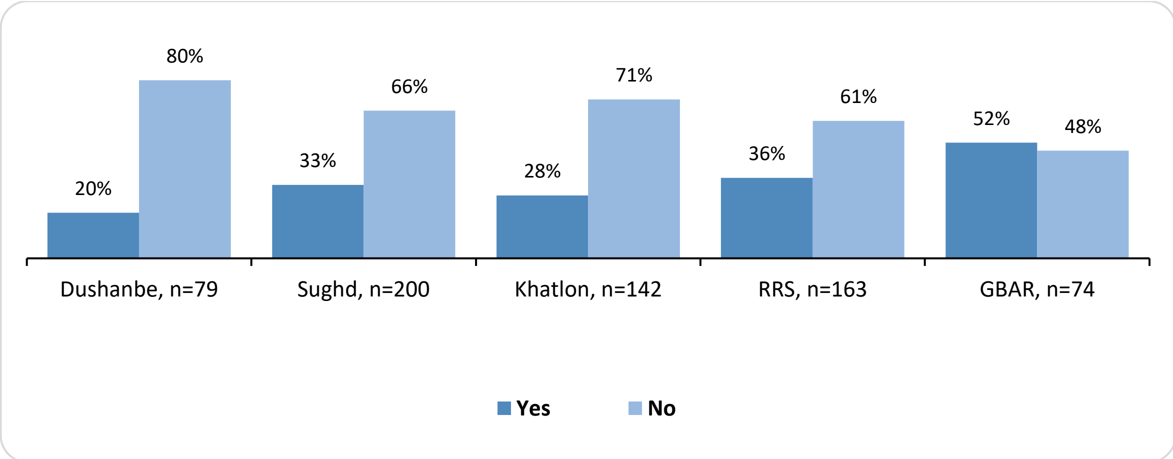
Analysis of the data for 2021 and 2023 shows that among respondents who consider the cost of services to be overpriced, the mobile Internet prevails (61-62%), followed by fixed Internet (43-47%) and tariff plans (38-56%). At the same time, one can see positive trends over the last 2 years: the share of respondents who consider costs of mobile Internet (from 62% to 61%) and tariff plans (from 56% to 38%) to be overpriced has decreased, while the share of those who consider mobile Internet prices not inflated has increased (from 36% to 38%).

Diagram 2.4.2. Mobile Internet (Do you think the price you are paying for Internet services is overestimated or not?)



Analysis of the survey data by regions of Tajikistan shows that, in general, most respondents are not ready to pay for access to interesting content. Thus, in Dushanbe only 20% of respondents are willing to pay, in Sughd - 33%, in Khatlon - 28%. Willingness to pay is somewhat higher in RRS - 36%. The only exception is GBAR, where half of the respondents (52%) expressed willingness to pay for access to interesting programs and intellectual content.

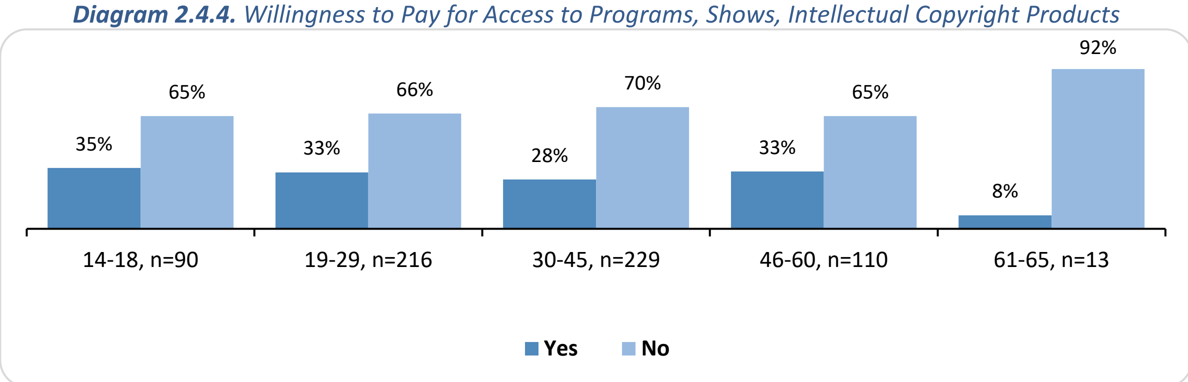
Diagram 2.4.3. Willingness to Pay for Access to Programs, Shows, Intellectual Copyright Products



Analysis of the survey data by age groups on willingness to pay for access to interesting content shows the following:

- in the younger age groups of 14-29 years old, the share of those willing to pay for content is at the same level, 33-35% answered ”Yes";
- 30-45-year-olds show a decline with only 28% expressing willingness to pay for content;
- the 46-60 age group again shows an increase, 33% are willing to pay for interesting content;
- Among those over 60, willingness to pay drops sharply to 8%.

Diagram 2.4.4. Willingness to Pay for Access to Programs, Shows, Intellectual Copyright Products



Analysis of the use of different types of **online content** shows that news is the most popular, it is consumed online by 53% of respondents. The second place is occupied by listening to music online - 51%. Online movies/TV series and educational programs are the next with an equal share of 39%. Reading books and audiobooks online is slightly less popular and accounts for 29%. 21% of respondents play online games. The least popular are podcasts (10%) and analytics (15%). Thus, news, music and video content are the leaders. Interactive and educational content is in less demand.

Based on the analysis of data on online content, for access to which respondents either already pay or are willing to pay, the following conclusions can be drawn:
- even today a significant part of the audience pays for access to premium content; with educational programs (44%) and literature in the form of e-books and audiobooks (44%). The share of those paying for access to video, music and news (37-40%) - traditionally popular entertainment and information content - is also quite high;
- at the same time, the greatest willingness to pay among those who have not yet done so is shown for literary (26%) and educational (20%) content. 15% and 13% of respondents are ready to pay for news and music, respectively. However, entertainment content, games, and podcasts arouse far less interest in the paid consumption model.

The data analysis shows that there is a clear pattern in the choice of online content that users are **willing to pay for**. The outstanding interest and solvent demand can be observed for unique premium content with high value for the audience. In particular, the largest share of users (26%) is ready to pay for access to literary works, books and audiobooks. The second popular type of paid content is educational programs (20%). This can explained by the fact that such content brings real benefit and allows acquiring new knowledge. At the same time, more traditional entertainment and news content namely, music, video, news causes less willingness to pay for its access.

Table 2.4.10. *Online Content Consumption and Payment*

	Online usage:		Already paying for access:		Ready to pay for access:	
	N	Yes	N	Yes	N	Yes
Movies/TV series	N=259	39%	N=112	40%	N=18	11%
Listening to music	N=341	51%	N=122	34%	N=35	13%
Games	N=144	21%	N=56	38%	N=9	9%
Reading books, audio books	N=194	29%	N=90	44%	N=28	26%
Listening to podcasts	N=68	10%	N=18	23%	N=5	7%
News	N=359	53%	N=149	37%	N=37	15%
Analytics	N=101	15%	N=40	35%	N=7	10%
Educational programs	N=263	39%	N=127	44%	N=31	20%

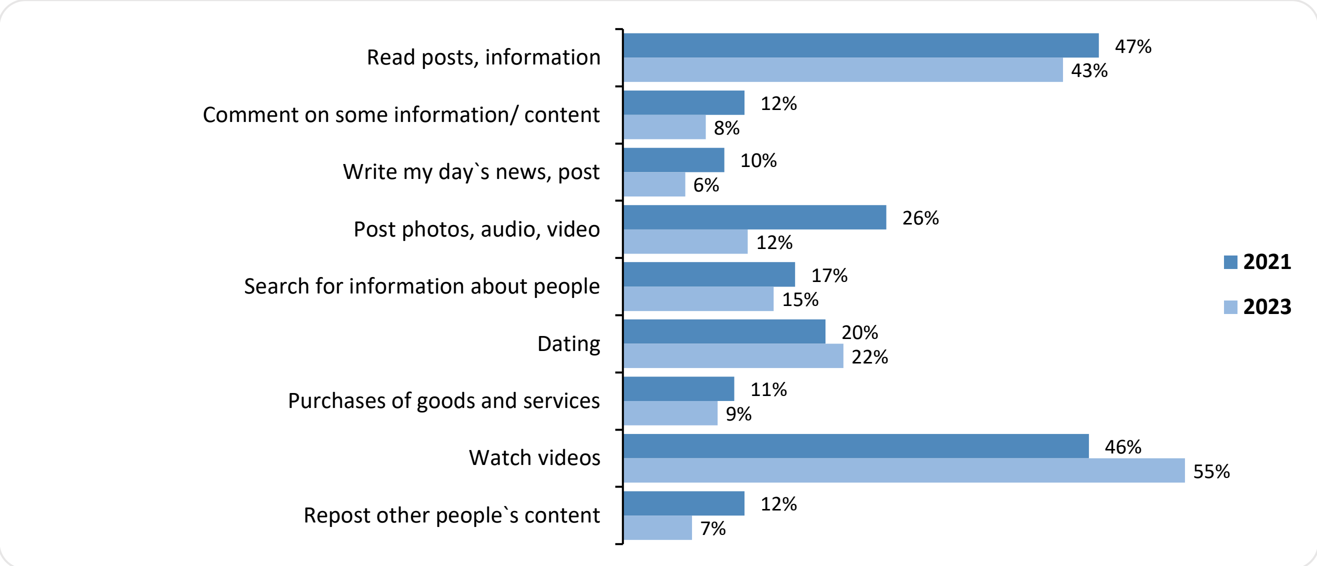
2.5. Social Networks

Data for 2023 shows that the most popular activity is watching videos, 55% of respondents. Reading posts and information takes the second place (43%). This is followed by searching information about people (15%), dating (22%) and viewing photos, audio and video (12%). Less popular are shopping and ordering goods/services (9%), commenting (8%), writing own posts (6%) and reposting (7%).

When comparing the data over the past two years, we can see that the popularity of watching videos (from 46% to 55%) and online dating (from 20% to 22%) has increased from 2021 to 2023. At the same time, activity in writing their own posts and comments decreased (from 10% to 6% and from 12% to 8%, respectively). Also, the share of those who post photos, audio and video decreased (from 26% to 12%).

Based on abovementioned trends, we can conclude that users are becoming less active in creating their own content and interacting with other users. However, consumption of ready-made entertainment content in the form of videos is growing. In addition, social networks remain a popular place for information search and dating. Overall, there is a shift from active participation to more passive consumption of content on the Internet.

Diagram 2.5.1. *Respondents' Preference in Using Social Networks*



Among respondents aged 14-18, watching videos (58%) is the most popular action, as well as dating (31%) and reading posts (38%). In the 19-29 age group, watching videos (60%) and reading posts (49%) lead the way. Respondents aged 30-45 also prefer watching videos (61%), reading posts (42%) and commenting on some information/content (11%). The older 46-to-60 age group prioritizes reading posts (43%), watching videos (37%) and searching for information about people (13%). Respondents over 60 years old give primacy to reading posts (18%) and searching for information about people (18%).
Interest in video content declines with the age. However, reading posts and news is stably popular. Young people are more active in using social networks for dating and self-expression by means of photos/videos. Older people are more likely to comment, share experiences and search for relevant information. Thus, with the age, priorities in the use of social networks change from entertainment to more practical purposes. However, in general, social networks remain in demand at all ages.

Table 2.5.1. *Respondents' Preference in Using Social Networks*

	14-18, n=91	19-29, n=218	30-45, n=229	46-60, n=112	61-65, n=13
Read posts, information	38%	49%	42%	43%	18%
Comment on some information/ content	8%	6%	11%	7%	8%
Write my day`s news, post	8%	6%	7%	3%	10%
Post photos, audio, video	24%	12%	11%	7%	3%
Search for information about people	19%	17%	12%	13%	18%

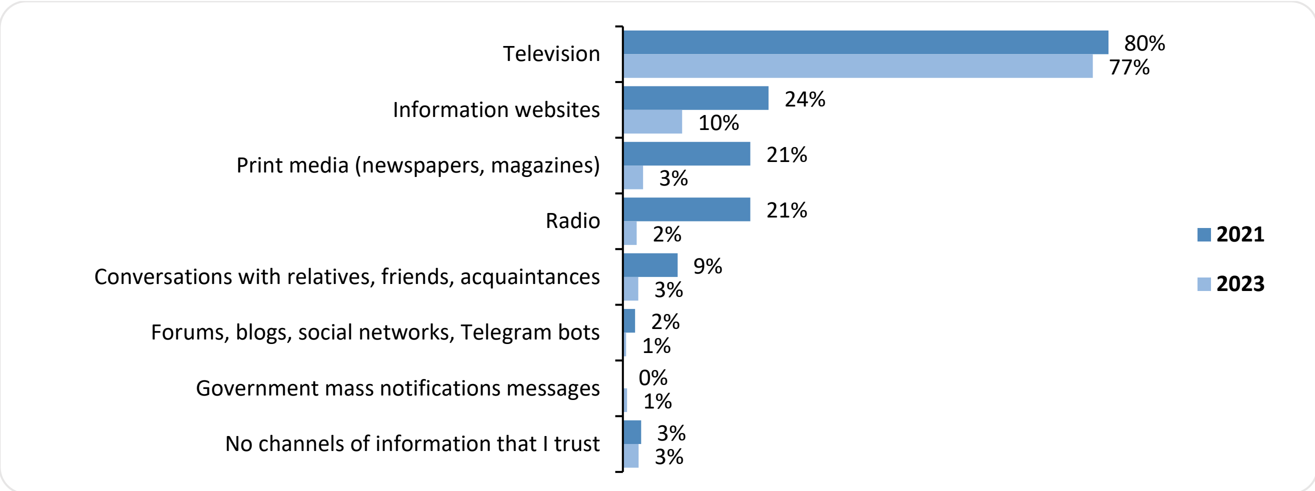
Dating	31%	27%	18%	12%	18%
Purchases of goods and services	11%	10%	9%	10%	0%
Watch videos	58%	60%	61%	37%	23%
Repost other people`s content	10%	7%	5%	8%	0%

2.6. Mass Media Credibility, Media Objectivity

The analysis of audience preferences in the choice of information sources for 2023 shows that television still enjoys the greatest credibility, it was chosen as a priority channel by 77% of respondents. Online media follow with a large gap (10%). Other traditional mass media (press, radio) have minimal trust, with 3% and 2% respectively. The level of credibility to information from personal communication and social networks is also insignificant.

Compared to the data 2021, there is a significant breakdown of confidence in online media (from 24% to 10%), press (from 21% to 3%) and radio (from 21% to 2%). The share of those who trust television has also decreased, but it makes little difference whether (from 80% to 77%).
One can see a tendency to the increased focus on TV media. Other traditional media are losing credibility in the opinion of the audience. As for online media, despite their growing influence, they carry little credibility. This may be linked with the spread of fake news and rumors on the Internet. However, in general, people are becoming more discerning in their choice of information sources.

Diagram 2.6.1. *Information Channels Credibility Level, N=1005*



Television is the leader at all ages, but its share increases with the age, from 72% among 14-18-year-olds to 92% among 61-65-year-olds. Young people aged 14-18 also use online media (14%) and radio (4%). In the 19-29 age group, internet (13%) and radio (1%) are declining in popularity. Middle-aged respondents (30-45yrs) prefer television (77%), and use the Internet (8%) and radio (4%) less frequently. Respondents over 45 years practically do not use online media and radio. Television dominates with a share of 85% in the group aged 46-60 and 92% in the group aged 61-65.

Table 2.6.1. *Information Channels Credibility Level, N=1005*

	14-18, n=148	19-29, n=295	30-45, n=336	46-60, n=190	61-65, n=36
Television	72%	74%	77%	85%	92%
Information websites	14%	13%	8%	5%	0%
Print media (newspapers, magazines)	3%	4%	3%	3%	2%
Radio	4%	1%	4%	0%	0%
Conversations with relatives, friends, acquaintances	3%	3%	3%	2%	0%
Forums, blogs, social networks, Telegram bots	0%	1%	1%	1%	0%
Government mass notifications messages	0%	1%	1%	1%	0%
No channels of information that I trust	2%	1%	3%	4%	6%

According to data 2023, the most popular social media in Tajikistan is WhatsApp messenger, trusted by 42% of respondents. It is followed by Instagram with 15% and Telegram with 8%. Other networks have a significantly smaller share, from 3% for Facebook to 0% for Twitter.

Analysis by region shows that WhatsApp is leading in all parts of the country. In Dushanbe, Instagram, Telegram and Facebook are also popular. In Sughd, Instagram and YouTube are widespread. In RRS, Instagram and YouTube are leading networks. Facebook is popular in GBAR. In Khatlon Province, 44% of residents do not trust social networks at all.
In general, one can see a tendency where the audience focus more on one or two of the most popular services. The growing popularity of messengers is associated with the necessity for more private and individual communication.

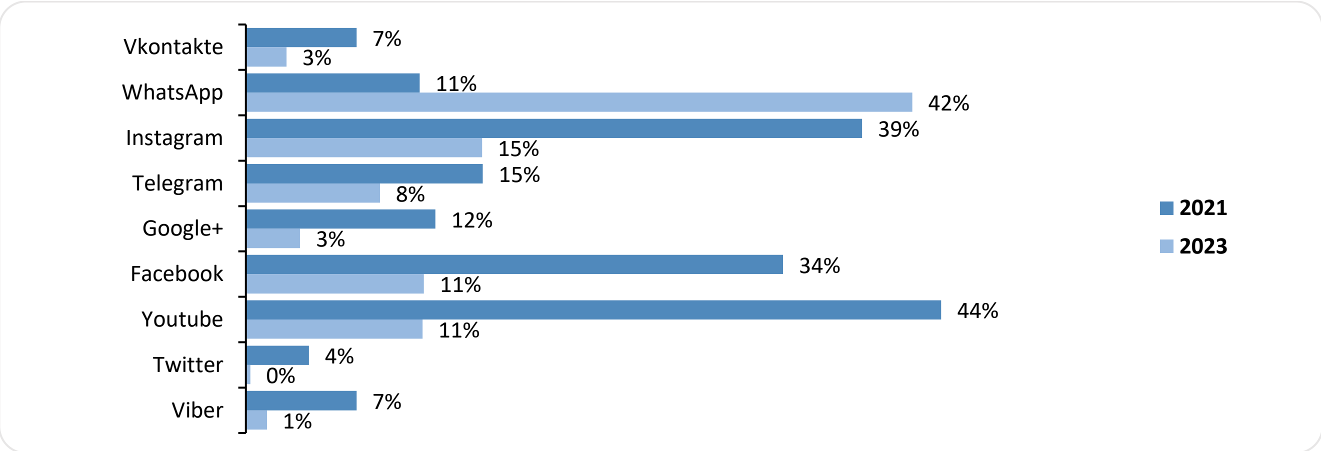
Table 2.6.2. *Social Media Credibility of Respondents*

	Dushanbe, n=91	Sughd, n=300	Khatlon, n=323	RRS, n=211	GBAR, n=80
VKontakte	1%	4%	1%	3%	11%
WhatsApp	56%	43%	29%	53%	59%
Instagram	25%	12%	8%	25%	17%
Telegram	15%	10%	3%	10%	18%
Google+	1%	6%	1%	4%	7%
Facebook	20%	12%	5%	12%	36%
YouTube	7%	10%	10%	17%	12%
Twitter	1%	0%	0%	0%	1%
Viber	0%	2%	1%	1%	2%
No social media that I trust	**9%**	**7%**	**44%**	**14%**	**0%**

According to data 2023, the most popular social media in Tajikistan is WhatsApp messenger, trusted by 42% of respondents. It is followed by Instagram with 15% and Telegram with 8%. Other networks have a significantly smaller share, from 3% for Facebook to 0% for Twitter. When comparing to 2021, the popularity of WhatsApp has increased significantly (from 11% to 42%). At the same time, Instagram (from 39% to 15%), YouTube (from 44% to 11%), and Facebook (from 34% to 11%) decreased.

Over the two years, there has been a considerable refocusing of users from entertainment and social networks on messengers. This may be related to the growing necessity to exchange personal messages and fatigue from the public nature of classic social networks. Additional to this, messengers provide more privacy in communication. In general, there is a trend towards more private use of social media.

Diagram 2.6.2. *Social Media Credibility of Respondents*

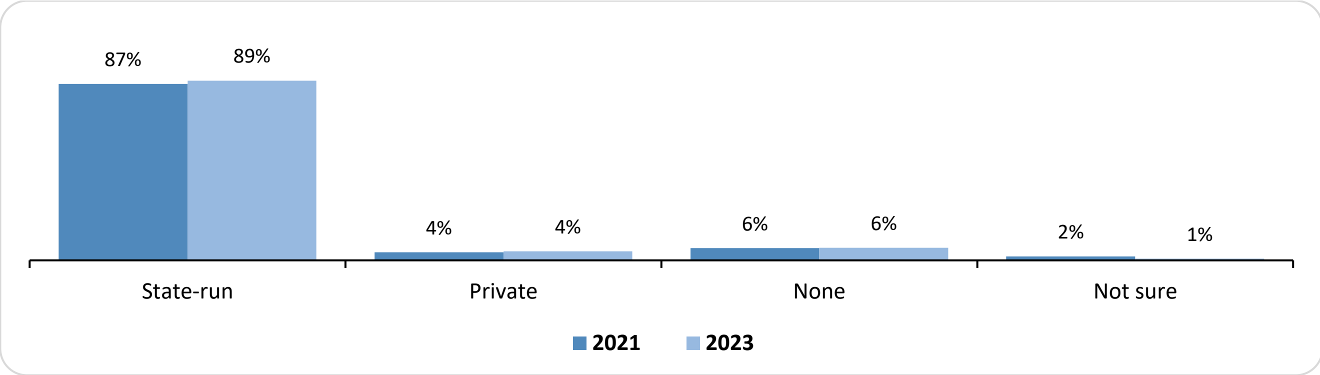


Alongside with social networks, respondents were also asked about the credibility to public and private media.

Analysis of the data for 2023 shows that respondents have the highest level of credibility to state sources of information, 89% of respondents trust them. Only 4% of respondents trust private media. 6% of respondents do not trust any information sources.

Compared to 2021, there is a slight increase (2%) in credibility to public sources of information. The share of those who trust private sources and those who do not trust any sources remained the same. The share of respondents who found it difficult to answer has decreased by 1%.

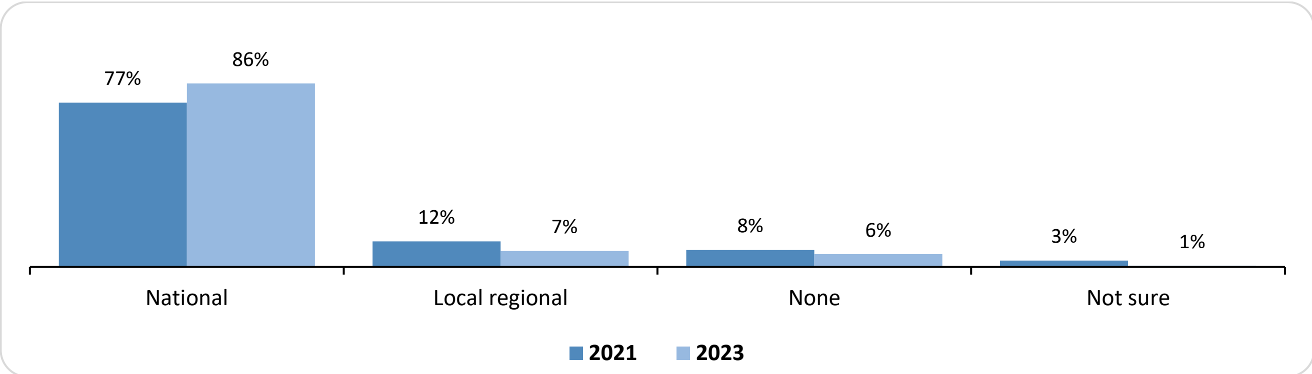
Diagram 2.6.3. *Credibility to State-Sponsored/Private Media*



The analysis of data 2023 shows that the overwhelming majority (86%) of respondents have the highest level of credibility to information from national sources. Trust in local regional sources is significantly less (7%). 6% of respondents state that they do not trust any sources of information.

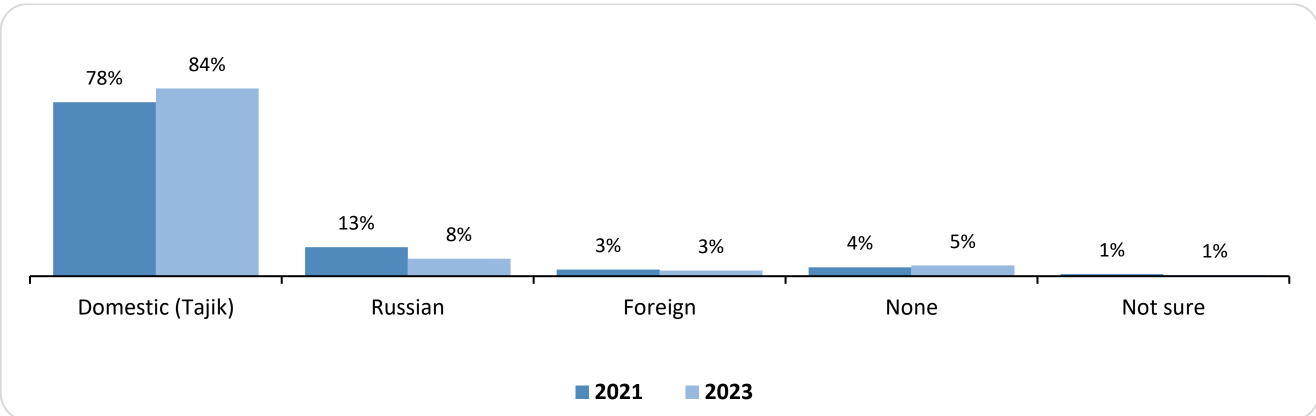
Compared to 2021, there is a noticeable increase (by 9%) in credibility to the republican sources of information. At the same time, trust in local regional sources decreased (by 5%).

Diagram *2.6.4.* *Credibility to National/Local Regional Media*



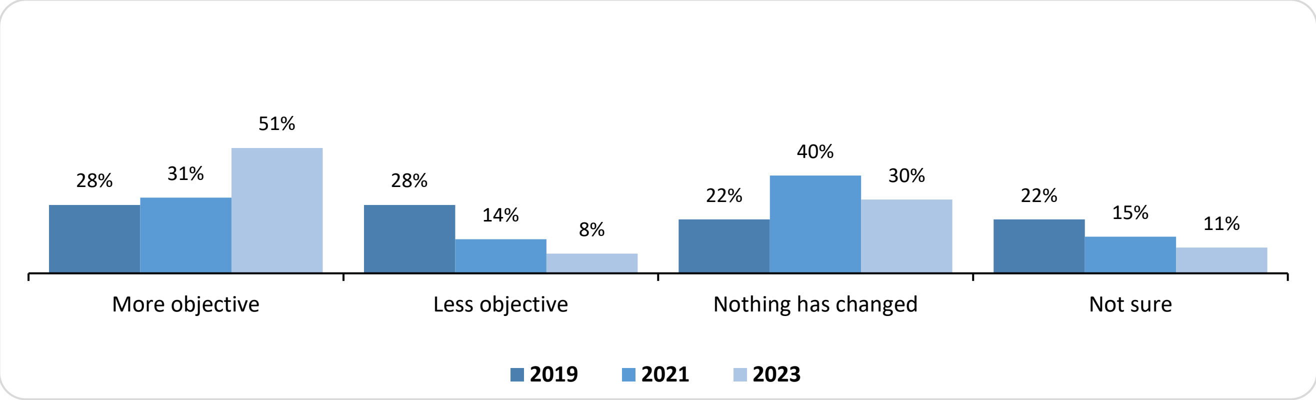
Analysis of data 2023 shows that the vast majority of respondents (84%) have the highest level of credibility to domestic (Tajik) sources of information. Significantly fewer respondents (8%) give preference to Russian media. The share of those who trust foreign sources and those who do not trust any sources is small, with 3% and 5% each, respectively.
Compared to 2021, credibility to domestic media increased (by 6%), while trust in Russian media decreased (by 5%). The share of those who trust foreign media has not changed.

Diagram 2.6.5. *Credibility to Domestic/Foreign Media*



Based on the data provided on respondents' assessment of the objectivity of media news coverage in Tajikistan for 2019, 2021 and 2023, the following trends can be identified:
- significant increase in the share of respondents who believe that the media have become more objective in covering news, with 28% in 2019 and 51% in 2023;
- the share of respondents who believe the media have become less objective has reduced drastically, from 28% in 2019 to 8% in 2023;
- the share of respondents who did not notice a change in the objectivity of news first increased from 22% in 2019 to 40% in 2021, and then decreased to 30% in 2023;
- the share of respondents who found it difficult to answer decreased, from 22% in 2019 to 11% in 2023.

Diagram 2.6.6. *Dynamics of Objectivity in the Tajik Media Compared to 2 Years Earlier*



2.7. Media Information Literacy. Critical Skills and Understanding of Online Safety Risks

In 2019, the most commonly used skill was the ability to gather information from a variety of sources (54%). About 1/4 of respondents knew how to formulate search queries (27%). Less developed skills were analysis and verification of information. 30% found it difficult to select any skills.

By 2021, the situation has improved somewhat, with increase in the proportion who understood the age rating of TV shows (28%) and could identify hidden fees (9%). However, the ability to gather information from different sources declined (37%).

The negative trend continues in 2023, with only 26% of respondents able to work with multi-source information. However, the ability to navigate the age rating of TV shows continues to increase (29%). 39% found it difficult to select any media literacy skills.

Table 2.7.1. *Respondents' Skills in Dealing With Information*

	2019	2021	2023
Gather information from different sources to get a full picture on the topic of interest to me	54%	↓37%	↓26%
Formulate search queries to find relevant information on the Internet	27%	↑31%	↓23%
Identify the differences between information and other messages, including but not limited to opinions, judgements, critics	14%	= 14%	↓11%
Determine whether the information found on the Internet is correct and credible	20%	↓17%	↓14%
Distinguish a bot/troll from a real discussant	0%	↑ 9%	↓ 4%
Can understand that a certain TV program is suitable for children and adolescents	10%	↑28%	↑29%
Identify hidden information about additional payments for services	4%	↑ 9%	↓ 6%
None of the above	**30%**	**28%**	**39%**

In Dushanbe and GBAR, the percentage of those who know how to gather information from different sources is relatively high - 22% each. In other regions this indicator is lower, 18% in Sughd and 25% in RRS. In terms of ability to formulate search queries, GBAR is the leader with 34%, followed by Dushanbe and Khatlon with comparable 22-24%. In Sughd and RRS this skill is less developed - 19-23%. The ability to understand differences between information and opinions is more pronounced in Khatlon (14%) and Sughd (10%). In other regions, this indicator varies from 6% in GBAR to 9% in RRS. As for the ability to determine the reliability of information online, the regions show similar results, 12% in Sughd and 16% in GBAR. The ability to recognize that a TV program is intended for children is most developed in Khatlon (43%). This is followed by GBAR (27%), RRS (24%), Sughd (23%) and Dushanbe (15%). Differences between the regions with respect to other skills are not significant. In general, we can note a higher level of media literacy in GBAR and Khatlon, as well as relatively good indicators in Dushanbe. In RRS and Sughd, skills are less developed. A significant share of respondents in all regions (28-43%) found it difficult to select any of the specified skills.

Table 2.7.2. *Respondents' Skills in Dealing With Information*

	Dushanbe, n=91	Sughd, n=300	Khatlon, n=323	RRS, n=211	GBAR, n=80
Gather information from different sources to get a full picture on the topic of interest to me	22%	18%	36%	25%	22%
Formulate search queries to find relevant information on the Internet	22%	23%	24%	19%	34%
Identify the differences between information/facts and other messages, including but not limited to opinions, judgements, critics	7%	10%	14%	9%	6%
Determine whether the information found on the Internet is correct and credible	15%	12%	15%	13%	16%
Distinguish a bot/troll from a real discussant	5%	3%	5%	2%	8%
Can understand that a certain TV program is suitable for children and adolescents	15%	23%	43%	24%	27%
Identify hidden information about additional payments for services	4%	7%	7%	5%	1%
None of the above	**38%**	**43%**	**38%**	**38%**	**28%**

Analyzing the data by age groups one can reveal the trends as below:

- in younger age groups (14-18 and 19-29 years old) the share of those who know how to formulate search queries is relatively high, 27-28%. In older groups, this indicator decreases, especially among 61-65-year-olds (1%);
- ability to gather information from different sources is most pronounced among respondents aged 61-65 (41%), and is also quite high among 19-29-year-olds (28%);
- ability to distinguish between facts and opinions increases with the age, from 7% in the group aged 14-18 to 20% in the 61-65 age group;
- the proportion who can determine the reliability of information online decreases with the age, from 17% among 19-29-year-olds to 6% among 61-65-year-olds;
- respondents in the older age groups, especially those aged 46-60 and 61-65, are better able to recognize whether a TV program is intended for children;
- remaining skills do not differ much by age groups.
- significant proportion at all ages (36-45%) found it difficult to choose any of the skills specified.

Table 2.7.3. *Respondents' Skills in Dealing With Information*

	14-18, n=148	19-29, n=295	30-45, n=336	46-60, n=190	61-65, n=36
Gather information from different sources to get a full picture on the topic of interest to me	21%	28%	25%	27%	41%
Formulate search queries to find relevant information on the Internet	27%	28%	23%	15%	1%
Identify the differences between information/facts and other messages, including but not limited to opinions, judgements, critics	7%	12%	11%	11%	20%
Determine whether the information found on the Internet is correct and credible	14%	17%	14%	10%	6%
Distinguish a bot/troll from a real discussant	1%	7%	4%	2%	0%
Can understand that a certain TV program is suitable for children and adolescents	24%	30%	31%	28%	46%
Identify hidden information about additional payments for services	4%	8%	5%	7%	6%
None of the above	**38%**	**38%**	**37%**	**45%**	**36%**

The analysis shows that respondents' awareness of various aspects of information security has been changing over the past years. If we compare the data for 2019, 2021 and 2023, we can see both an increase in awareness in some areas and a decline in others.

For example, misinformation knowledge has reduced from 71% in 2021 to 32% in 2023. At the same time, awareness of fake news increased from 16% in 2019 to 32% in 2023. Knowledge of propaganda peaked in 2021 (76%), and by 2023 the figure has fallen to 23%.

The survey showed a declined interest in information war issue, from 65% in 2021 to 19% in 2023. At the same time, media literacy became more relevant for the audience, its knowledge increased from 49% in 2021 to 32% in 2023.

One can also see a low level of awareness of such phenomena as factchecking, trolls and bots on social networks. Only about a quarter of respondents are aware of financial fraud on the Internet.

It can be stated that attention to some aspects of information security (misinformation, propaganda) has decreased and interest in others (media literacy, fakes) has increased. It shows the necessity to raise user awareness across the whole range of issues for more effective counteraction to information threats.

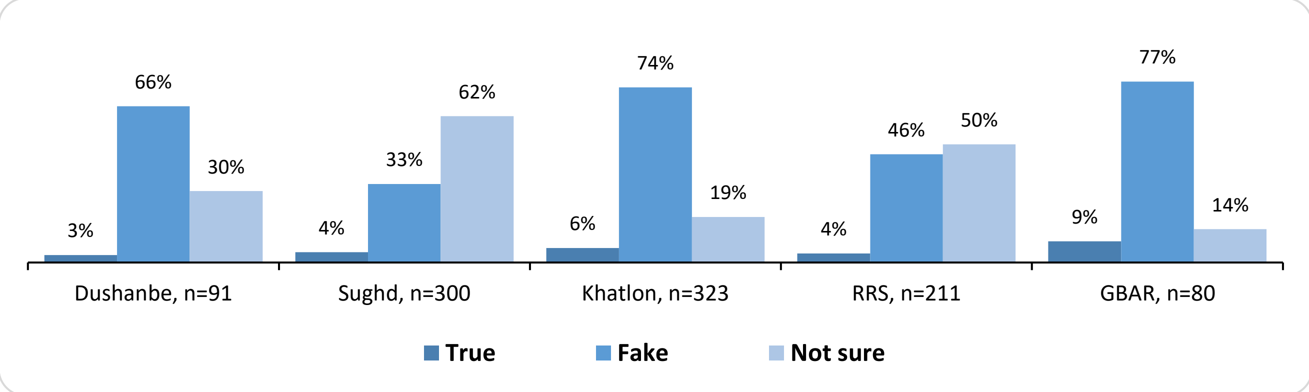
Table 2.7.4. *Knowledge of Media Literacy Concepts*

	Know		
	2019	2021	2023
Disinformation	-	71%	32%
Propaganda	34%	76%	23%
Compromising information	17%	79%	14%
Internet addiction	28%	79%	31%
Information war	28%	65%	19%
Fake news	16%	76%	32%
Media literacy	-	49%	32%
Fact-checking	-	36%	12%

Troll, bot	-	52%	5%
Social media algorithms	-	36%	12%
Financial fraud	-	-	23%

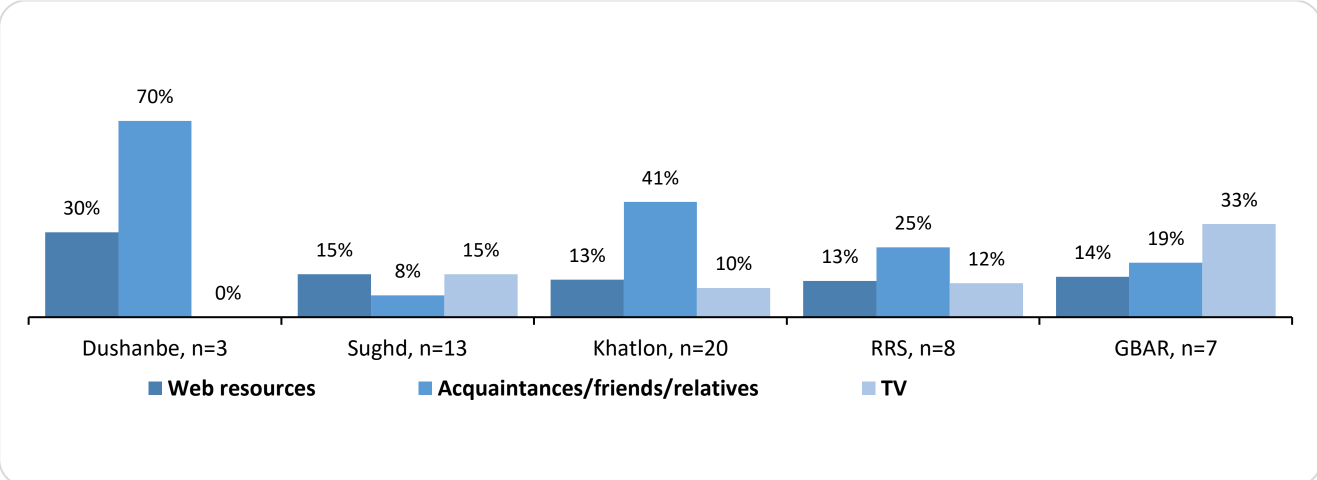
Across all regions, one can observe the prevailing opinion that information about payments to labor migrants is a fake. This indicator is especially high in GBAR (77%) and Khatlon (74%). The smallest share of those who believe that the information is fake is in Sughd (33%). Here one can also see the highest percentage of those who found it difficult to answer (62%). The opinion that the information is true is most widespread in GBAR (9%). In other regions this indicator does not exceed (6%).

Diagram 2.7.1. *By presidential edict, labor migrants who have returned from migration or are unable to migrate will receive a lump-sum cash assistance in the amount of 12,000 somoni*



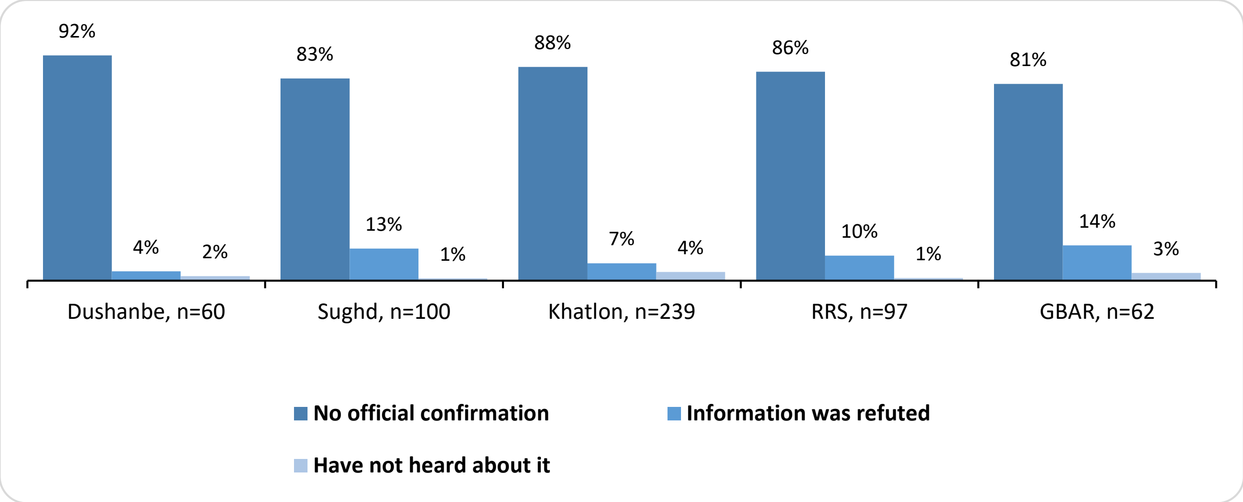
In Dushanbe, the vast majority (70%) learn the news from acquaintances, friends and relatives. Only 30% of respondents use Internet resources; television is not mentioned as a source. In Sughd, television (15%) and the Internet (15%) prevail. Information from personal communication is much less widespread (8%). In Khatlon, personal contacts are leading (41%), followed by the Internet (13%) and TV (10%). In RRS, acquaintances are mentioned more often (25%), as well as the Internet and TV (12-13% each). In GBAR, 33% of respondents learn the news from TV, 14% - from the Internet, and 19% - from acquaintances.

Diagram 2.7.2. *Sources Where Respondents Could Find This Information: "By presidential edict, labor migrants who have returned from migration or are unable to migrate will receive a lump-sum cash assistance in the amount of 12,000 somoni"*



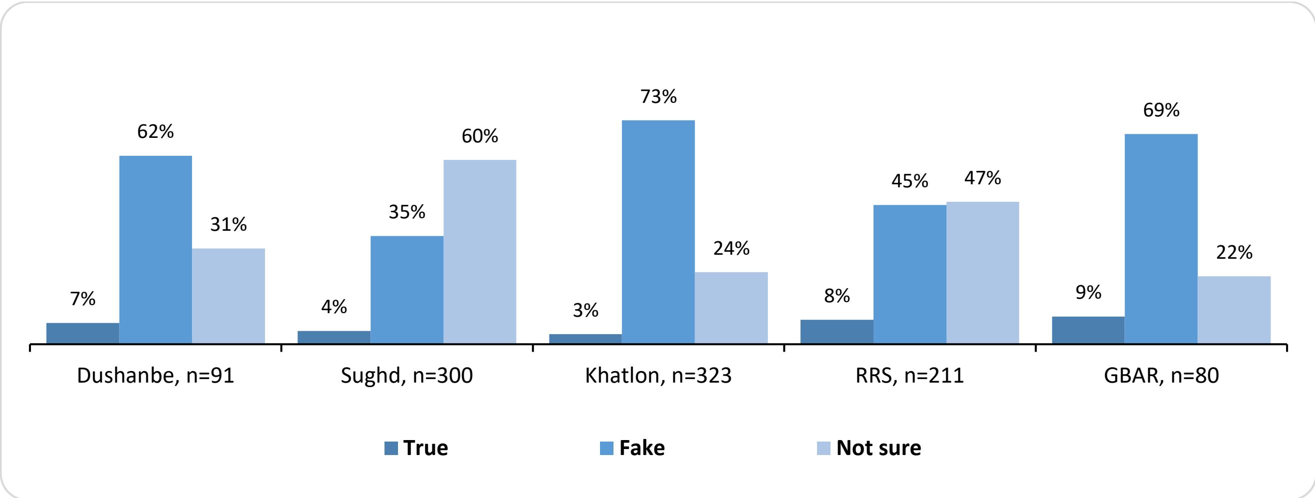
In all regions, the overwhelming majority (81-92%) explained their opinion by lack of official confirmation of this information. The highest shares of respondents who chose this option are in Dushanbe (92%) and Khatlon (88%). References to the fact that this news was denied are more common seen in the answers of respondents from Sughd (13%) and GBAR (14%). In other regions this option was chosen by 4-10% of respondents. An insignificant part of respondents (1-4%) noted that they had not heard about this news.

Diagram 2.7.3. *Why this information according to respondents is a fake "By presidential edict, labor migrants who have returned from migration or are unable to migrate will receive a lump-sum cash assistance in the amount of 12,000 somoni"*



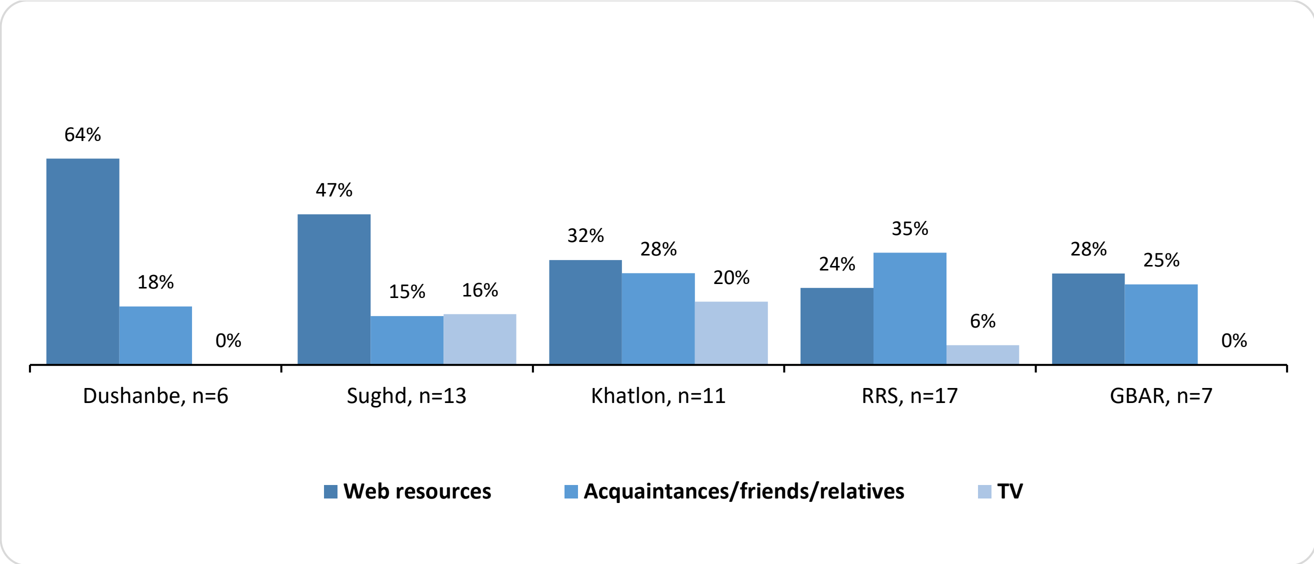
The majority of respondents in all regions considered information about the expansion of Gazprom's activities in Tajikistan to be a fake. The highest proportion of those who chose the "fake" option is in Khatlon (73%) and GBAR (69%). The least number of those who considered the news to be a fake is in Sughd (35%). Opinion about verity of the information is most widespread in GBAR (9%) and RRS (8%). The majority of respondents in Sughd (60%) and RRS (47%) found it difficult to identify a fake. Thus, across Tajikistan, 55% of respondents considered the news to be a fake, and 40% found it difficult to answer.

Diagram 2.7.4. *Gazprom expands its activities in Tajikistan and provides the residents of Tajikistan with an opportunity to earn a quick income by receiving dividends from the purchase of the company stock*



In Dushanbe, the majority of respondents (64%) learned the news from Internet resources. The share of those who received information from acquaintances is much lower (18%); television was not mentioned. In Sughd, the Internet prevails in the abovementioned context (47%), followed by television (16%), then personal contacts (15%). In Khatlon, acquaintances prevail (28%), followed by the Internet (32%) and TV (20%). In RRS, relatives and friends were mentioned more often (35%), followed by the Internet (24%) and TV (6%). As for GBAR, the Internet and personal contacts were mentioned much the same (28% and 25%), TV was not mentioned.

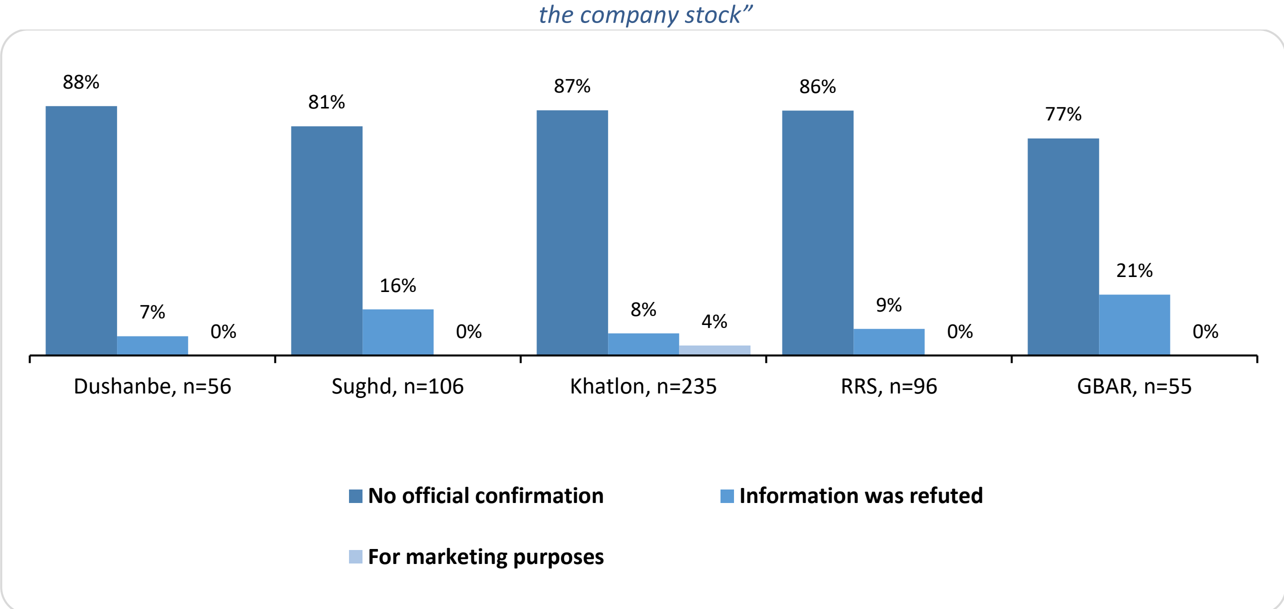
Diagram 2.7.5. *Sources where Respondents Could Find the Information: "Gazprom expands its activities in Tajikistan and provides the residents of Tajikistan with an opportunity to earn a quick income by receiving dividends from the purchase of the company stock"*



Analyzing the respondents' answers about the reasons to consider the news about Gazprom to be a fake, the following trends can be distinguished:

- in all regions, the vast majority (77-88%) mentioned the lack of official confirmation. This option was more frequently marked in Dushanbe (88%) and Khatlon (87%).
- references to refutation of information are more typical for Sughd (16%) and GBAR (21%). In other regions this option was chosen by 7-9% of respondents.
- option "*for marketing purposes*" was chosen only in Khatlon (4%), in other regions this option was not mentioned.

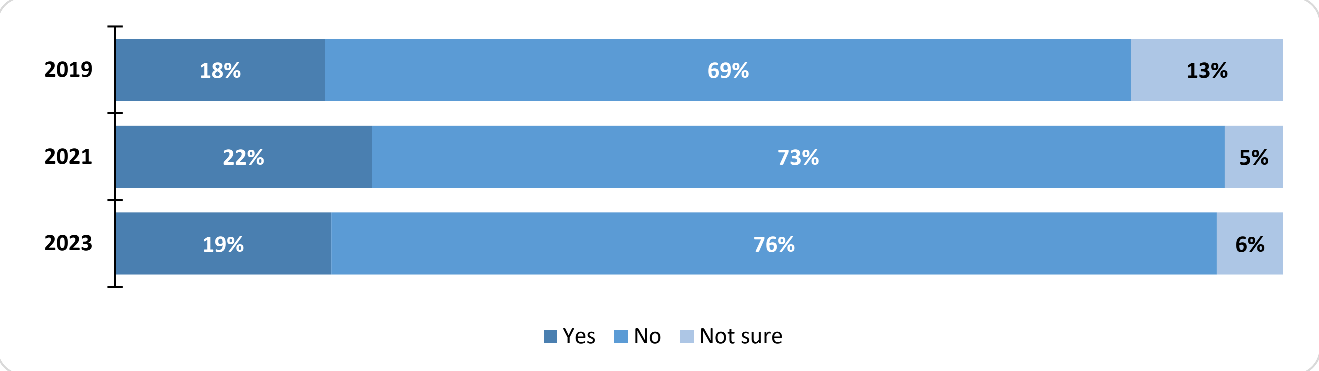
Diagram 2.7.6. *Why this information according to respondents is a fake: "Gazprom expands its activities in Tajikistan and provides the residents of Tajikistan with an opportunity to earn a quick income by receiving dividends from the purchase of the company stock"*



In 2023, 76% of respondents said they did not encounter contradictory media coverage of the same political event; 19% noted that they had such cases.

Comparing by years, we can see that the proportion who have not encountered contradictory media coverage of politics is increasing, from 69% in 2019 to 76% in 2023. The share of those who have encountered it increased from 18% to 19%. This may indicate some decrease in the level of inconsistency and bias in the media coverage of political events in Tajikistan over the last years. However, the problem remains relevant, given that 19% of respondents in 2023 still mention the presence of disagreements in political news feed.

Diagram 2.7.7. *Diverse Coverage of Political Events in Different Information Sources*



Over the period 2019-2023, one can see a positive trend: the share of those who have not encountered diverse coverage of the same political events in different media sources is growing. This may indicate to a certain decrease of bias and manipulation in news. However, there is still about 19% of respondents in 2023 who note the presence of such contradictions. This indicates that the problem of propaganda still remains as well as the necessity to improve the media objectivity.

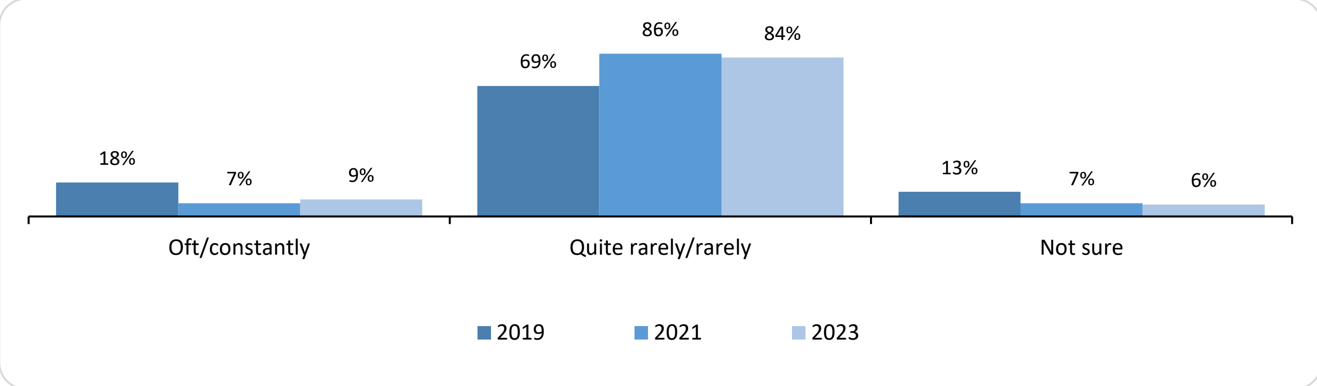
As for the population's reaction to contradictory information, there is a growing involvement in analyzing and comparing data from different sources. The share of those who discuss news with friends and acquaintances is growing.
However, a significant part of the audience (about 29%) still trusts only one source. This shows an insufficient level of media literacy among the citizens.

Table 2.7.5. *Actions in Case of Different Coverage of the Same Political Event*

	2019	2021	2023
Share my observations on social media	12%	11%	10%
trust only one source of information from which I always get information	29%	27%	29%
I ask the opinion of friends, relatives, acquaintances and make my own conclusion	20%	16%	22%
Compare information with what is written/shown in other media sources and make my own conclusion	17%	26%	21%
Do not take any steps	22%	17%	16%
Not sure	-	2%	1%

Analyzing the data for 2023, it can be noted that the vast majority of respondents (84%) only occasionally experience the feeling of being deceived or having a point of view imposed when watching/reading news; and 9% experience it frequently or constantly.
Comparing results of different years, one can observe a positive trend: the share of those who rarely experience manipulation in the news increased from 69% in 2019 to 84% in 2023. At the same time, the share of respondents who encounters it frequently decreased from 18% to 9%.

Diagram 2.7.8. Frequency of Experiencing Deception When Receiving Information from Media



Analyzing the data for 2023, one can say that the most popular activity to check unreliable information is to contact friends and acquaintances, with 43% of respondents say so. 32% of respondents prefer to search on the Internet, 19% - in print media, 14% - on the radio, 8% contact the editorial office of the source. 22% are not going to take any steps.

Comparing responses from different years, we can see that the proportion of those seeking clarification from friends and acquaintances is growing, from 25% in 2019 to 43% in 2023. The proportion of those who prefer to turn to the Internet is decreasing, from 38% to 32%. The proportion of respondents who are not going to take any steps is decreasing, from 25% to 22%.

Table 2.7.6. Sources for Verification/Clarification of Information

	2019	2021	2023
Search for information online	38%	38%	32%
Turn to friends, relatives, acquaintances	25%	27%	43%
Search for information in newspapers or magazines	35%	14%	19%
Search for information on TV channels	-	-	32%
Listen to the news on the radio	-	-	14%
I will seek clarification from the editorial office of the source of dubious or incomplete information (i.e. editorial office of TV, radio, newspaper, website)	4%	4%	8%
I won't do anything/I won't waste time checking and clarifying the information	**25%**	**34%**	**22%**
Not sure	**11%**	**2%**	**1%**

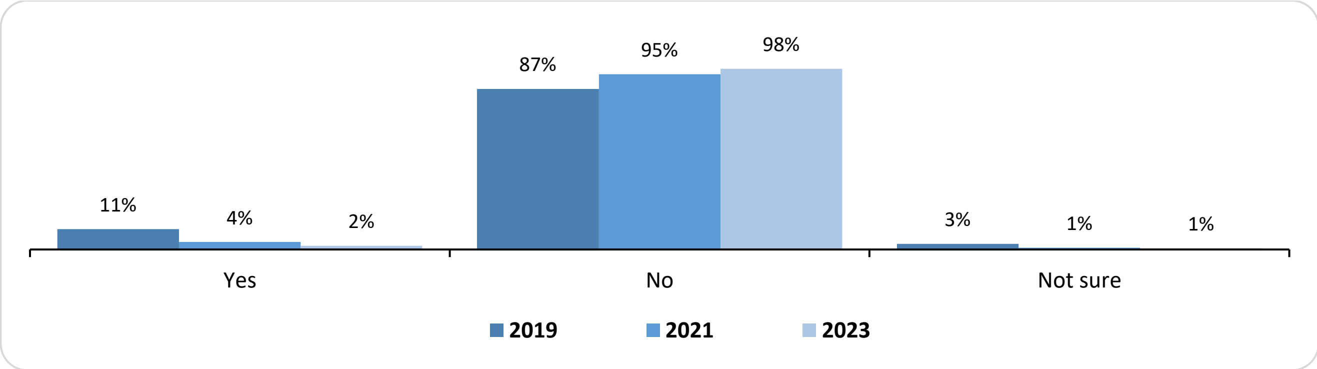
At all ages, the leading trend is to contact friends and acquaintances, 38% among 46-60-year-olds and 45% among 19-29-year-olds. Internet search is the most popular among respondents aged 14-29 (39-40%), and decreases with the age to 0% among the older group of 61-65 year olds. Television is more often chosen by respondents over 30 years old. The share of those watching TV grows from 23% in the 14-18 age group to 40% among 46-60-year-olds. Radio is more often mentioned by older respondents, 33% among 61-65-year-olds. Appealing to the editorial office of a source is the least popular, but it is more often chosen by young people under 18. The share of those who do not make any verification is stable at all ages of about 20-22%.

Table 2.7.7. Sources for Verification/Clarification of Information

	14-18, n=148	19-29, n=295	30-45, n=336	46-60, n=190	61-65, n=36
Search for information online	39%	40%	33%	20%	0%
Turn to friends, relatives, acquaintances	44%	45%	43%	38%	43%
Search for information in newspapers or magazines	16%	19%	18%	22%	32%
Search for information on TV channels	23%	31%	31%	40%	36%
Listen to the news on the radio	10%	13%	14%	13%	33%
I will seek clarification from the editorial office of the source of dubious or incomplete information (i.e. editorial office of TV, radio, newspaper, website)	11%	7%	8%	7%	12%
I won't do anything/I won't waste time checking and clarifying the information	20%	20%	22%	22%	37%

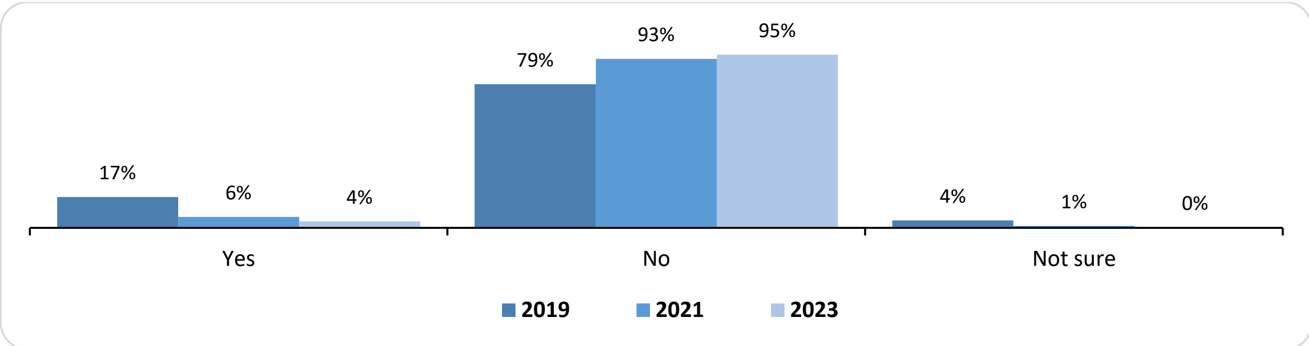
Analyzing the data 2023, one can see that the overwhelming majority of respondents (98%) did not contact media outlets to verify the information. Only 2% of respondents have had such experience. Comparing the results from different years, there is a significant decrease in the share of those who contacted editorial offices: from 11% in 2019 to 2% in 2023. At the same time, the share of those who did not take such actions increased from 87% to 98%.

Diagram 2.7.9. *Apply to Editorial Offices of Mass Media*



Analyzing the data 2023, one can see that the vast majority (95%) did not call-in live radio or TV. Only 4% of respondents had such experience. Comparing the different years, there is a rapid decline in the proportion of those who have called-in live radio or TV: from 17% in 2019 to 4% in 2023. At the same time, the proportion of those who have never done this has grown, from 79% to 95%.

Diagram 2.7.10. *Appeal to Live Programs or TV Shows*



Qualification of Information Literacy and Digital Competencies

This section examines the level of information literacy and digital competencies of the respondents. For more detailed analysis, this section can be divided into two parts:

1. Information literacy skills and competencies
2. Information literacy and digital competencies index.

In the first part, we will analyze what kind of information security skills and digital competencies the respondents know how to apply in practice. Respondents were asked what specific measures they undertake to ensure the security of their personal data. The following three options were given: “Can do it”, “Can apply in practice” and “Cannot do it”. In this part of the section, we will assess the percentage of respondents who selected the option “Can do it” to determine how widespread these skills are among the Tajik audience.

1. Information literacy skills and practices

Analyzing the data for 2023, we can see that the most commonly used skills are changing passwords (29%), cleaning a computer from unnecessary files (32%), and creating backup files (28%). Less than 10% of respondents know how to recognize online extortion (8%) and use parental controls (18%).

Compared to previous years, the share of those who know how to make backup files (from 12% to 28%), clean a computer (from 22% to 32%), and use parental controls (from 6% to 18%) increased. At the same time, the share of those who know how to delete the history of online activity decreased (from 35% to 26%). No significant changes are observed for other skills.

Table 2.7.8. *Availability of Skills to Ensure Data Security by Age*

I can:	2019	2021	2023
Clean my history of online activity	35%	27%	26%
Change passwords on the computer and on online services	20%	28%	29%
Change settings for access to your information in social networks for different groups of users	12%	12%	13%
Create multiple user accounts for the same computer	13%	7%	16%
Clean my computer from unnecessary files	22%	18%	32%
Scan my computer for viruses	18%	17%	25%
Back up files stored on the computer	12%	10%	28%
Use the parental control features on my computer	6%	5%	18%
Detect the situation of cyber extortion	5%	5%	8%
Determine the security level of personal data transfer when using online services	9%	7%	15%

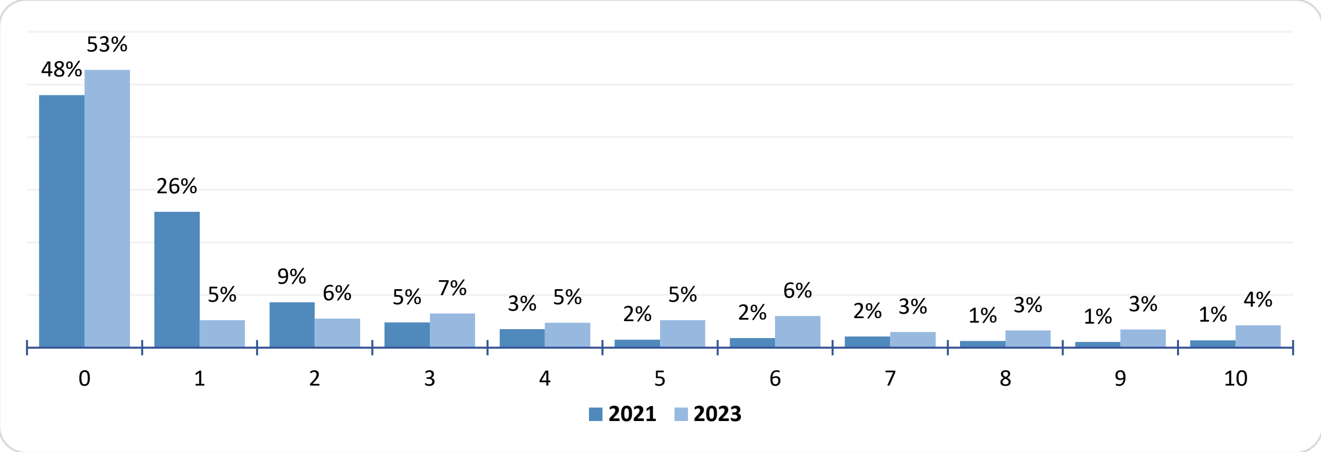
2. Information Literacy and Digital Competencies Index

In this part of the section, we analyze the index of information literacy and digital competencies. This index was formed on the basis of respondents' answers to 10 statements related to information security skills and digital competencies. Each respondent received an individual score equal to 1 if he/she selected the options “Can do it” and “Can apply in practice” and 0 if he/she selected “Cannot do it”. Thus, we will determine the index of information literacy and digital competencies of each respondent, which can range from *0* to *10.* This index will allow us to assess more accurate the level of digital literacy and competence of our respondents. In order to identify changes and dynamics in the level of information literacy, we will also conduct a comparative analysis of indexes for 2021 and 2023.

Thus, the analysis results of indexes for 2023 show insignificant positive dynamics in the level of information literacy and digital competencies of the population of Tajikistan. In particular, if in 2021 the absolute majority of respondents (82%) scored from 0 to 2 points, then in 2023 this indicator has slightly improved, where more than half of respondents (64%) scored from 0 to 2 points. The share of those who scored the maximum 10 points also increased from 1% to 4%. However, the proportion of respondents who scored 0 points increased from 48% in 2021 to 53% in 2023. This indicates a persisting high proportion of the population with extremely low level of digital competence. At the same time, the countrywise average score increased slightly from 1.4 to 2.4. This shows some progress, but overall level of information literacy in Tajikistan remains extremely low.

Countrywise average score:
2021 – 1,4
2023 – 2,4

Diagram 2.7.10.1. *Distribution of Respondents by Index in Terms of Information Literacy and Digital Competency (Percentage Share in Terms of Index Value)*

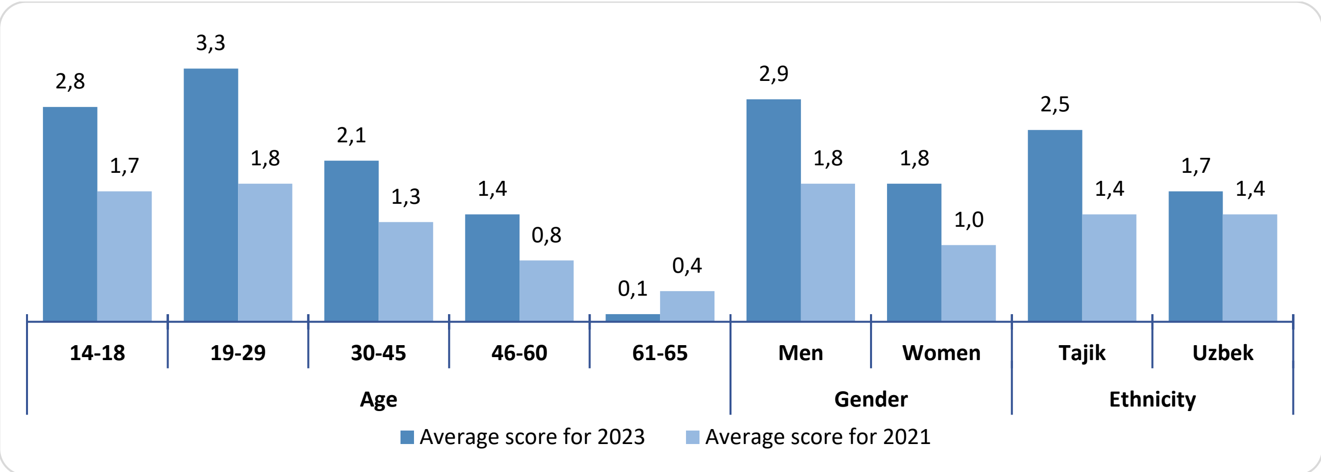


Having analyzed the data of the index with regard to information literacy and digital competencies in the context of age groups, gender and ethnicity, the following conclusions can be drawn:

- The highest indicators of information literacy are traditionally demonstrated by young people aged 14-18 (growth from 1.7 to 2.8) and middle-aged people of 19-29 years old (growth from 1.8 to 3.3) – the leadership of these age groups was held both in 2021 and 2023. The level of information literacy naturally decreases with age, and this trend is still on in both 2021 and 2023. The lowest indicator (0.1 point) is noted in the older group aged 61-65.
- Positive dynamics is observed in increase of the level of information literacy both among men (from 1.8 to 2.9) and women (from 1 to 1.8) compared to 2021. At the same time, the growth is particularly noticeable among men whose level of information literacy was also higher in 2021.
- By ethnicity, Tajiks are the leaders, whose average score increased from 1.4 in 2021 to 2.5 in 2023. Uzbeks living on the territory of Tajikistan also show positive dynamics (growth from 1.4 to 1.7).

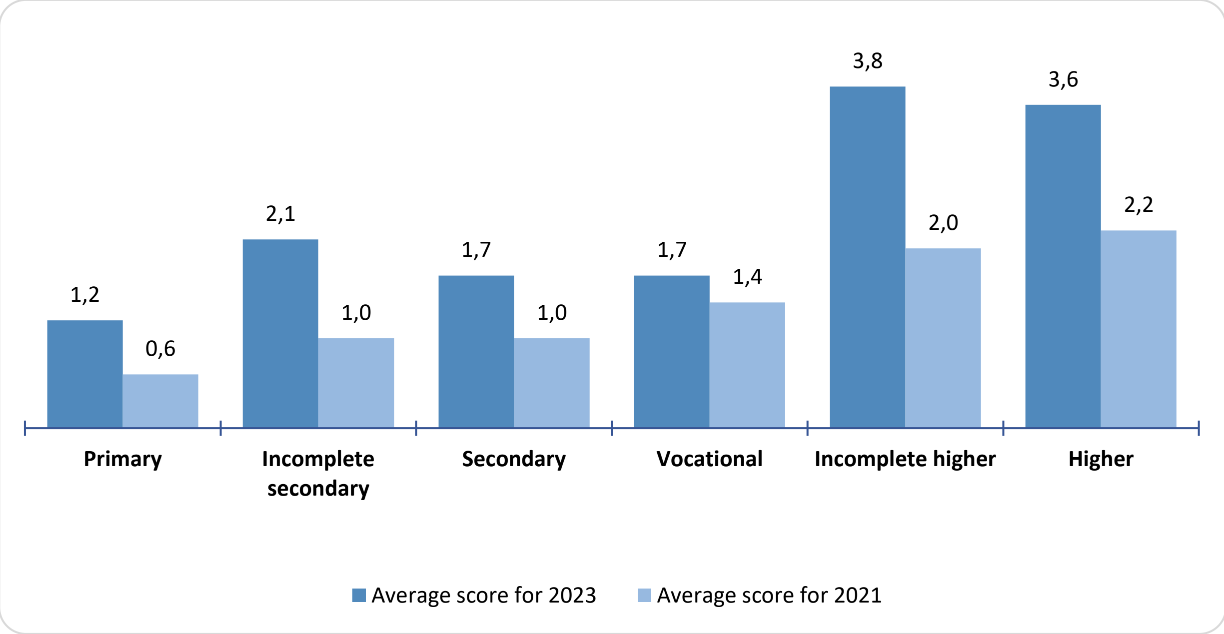
Thus, the most *vulnerable* groups in Tajikistan are the elderly and women. Targeted programs are needed to improve their information literacy and overcome the digital divide.

Diagram 2.7.10.2. *Average Score of Respondents on Media Literacy and Digital Competency Index by Age, Gender and Ethnicity*



Analyzing the data on information literacy level in the context of respondents' education, we can note the following: there is a relatively positive dynamics of growth of the average score in 2023 compared to 2021 in all groups by education. The highest rates and growth of digital competencies are observed among those with incomplete (3.8) and complete higher education (3.6). Respondents with primary education (1.2 points) demonstrate the lowest level of information literacy in 2023. Thus, the higher the level of education, the higher the digital skills. However, one can still see positive dynamics in all groups.

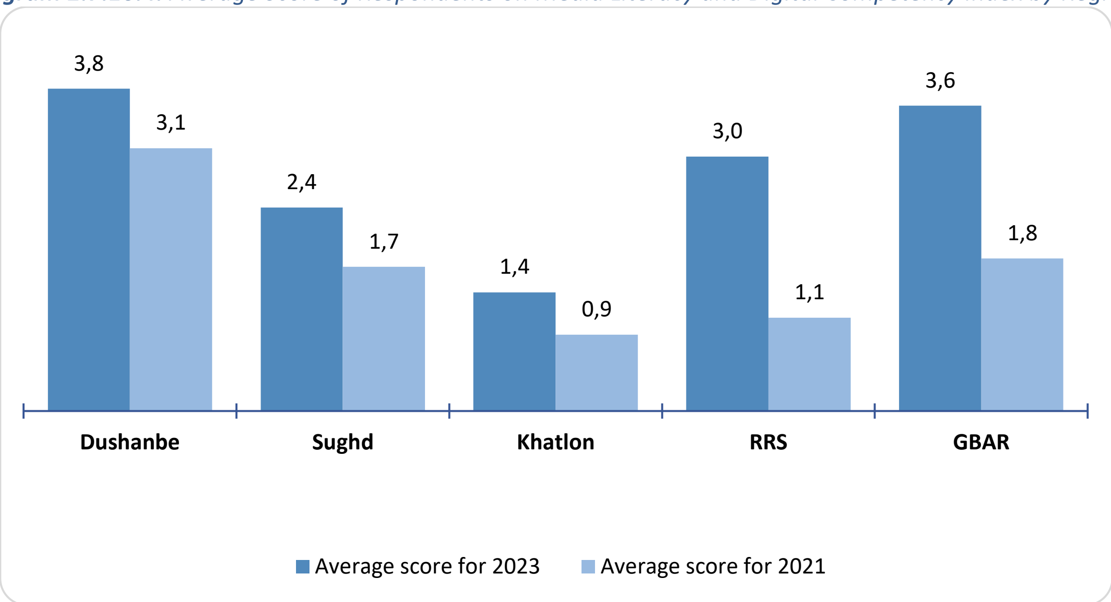
Diagram 2.7.10.3. Average Score of Respondents on Media Literacy and Digital Competency Index by Educational Level



Having analyzed the data on information literacy level in the context of regions of Tajikistan, it can be noted that in almost all regions there is a positive dynamics of growth of the average score from 2021 to 2023:

- The highest information literacy scores are traditionally in the capital city of Dushanbe, 3.1 points in 2021 and 3.8 points in 2023.
- Significant increases are noted in GBAR (up from 1.8 to 3.6) and RRS (up from 1.1 to 3).
- Relatively low scores remain in Khatlon (1.4), and this trend is seen in both 2021 and 2023.

Diagram 2.7.10.4. Average Score of Respondents on Media Literacy and Digital Competency Index by Regions



Internet Threat Perception

Analyzing the data for 2023, we can see that 56% of respondents say that they are not concerned about anything on the Internet. 27% of respondents are concerned about malicious sites and viruses, 24% - about the abundance of unfair advertising. Less than 10% mention concerns about personal information, religious or malicious content.

Comparing to previous years, one can see an increase in the proportion of those who do not have any concerns, from 75% in 2019 to 56% in 2023. However, concerns about viruses (from 47% to 27%), pseudoscientific propaganda (from 14% to 3%), and religious content (from 10% to 5%) have decreased.

Table 2.7.9. *Internet Threat Perception*

	2019	2021	2023
Malicious websites (viruses)	21%	47%	27%
Resources with negative and illegal content	6%	13%	8%
Posting personal information that can be used by intruders	4%	17%	7%
Ignoring the real problems, smoothness of a common picture	-	7%	4%
Abundance of deceptive advertising	-	26%	24%
Pseudoscientific propaganda	-	14%	3%
Excessive religious content	-	10%	5%
Obtruding a point of view, e.g. when reporting on conflicts	-	-	3%
Do not use the Internet	**-**	**-**	**2%**
Nothing causes concerns	**75%**	**29%**	**56%**

Most respondents agree that Tajikistan has both state and private media (76%), that the Internet is primarily for entertainment (64%), and that online publications can have a negative impact on reputation (59%). At the same time, only 17% believe it is acceptable to share personal passwords, and 26% believe that the Internet allows to remain anonymous.

Comparing the data over the last 3 years, the following trends are seen:

Awareness of the diversity of media landscape in Tajikistan is growing; the percentage of the agreeable has increased from 48% in 2019 to 76% in 2023.Belief in online anonymity decreased from 30% to 26%. Willingness to share sensitive data decreased from 21% to 17%. Persistently high share of respondents are sure that publishing online affects the reputation.

Table 2.7.10. *Perception of Mass Media and Internet*

	Percentage of Agreeable		
	2019	2021	2023
Newspapers, TV channels and Internet portals in Tajikistan are both state-run and private	48%	72%	76%
Only the state-run media can make quality products	-	75%	72%
Internet is primarily a source for entertainment and communication	31%	69%	64%
Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	26%	42%	34%
When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	44%	40%	40%
Internet allows you to keep anonymity - the user cannot be identified	30%	41%	26%
Some messages/information posted by a person online can negatively affect his/her career and private life	52%	67%	59%
It is sometimes permissible to give someone information about your passwords, code keys (bank, internet, etc.)	21%	45%	17%

Assessment of Media Literacy Level

This section presents the results of the analysis of information obtained from respondents regarding their ability to analyze and interpret media information. Respondents were given a number of judgments with predetermined “competent” (correct) answers. Thus, as a result of analyzing the “competent” answers to the provided statements, as well as a comparative analysis between the data for 2021 and 2023, a number of trends can be identified.

According to the data, there is a positive trend in understanding the basics of media awareness among respondents in the Republic of Tajikistan over the period from 2021 to 2023. In particular, the share of respondents who gave a "competent" answer to the statement that the media in Tajikistan can be both public and private increased from 72% in 2021 to 76% in 2023. At the same time, the share of respondents who believe that not only state media can produce quality products increased from 19% to 22%.

The share of those who understand that the Internet is primarily not only an entertainment resource, but also a source of information has also increased from 23% to 28%. Awareness of the influence of media information on people's thoughts and behavior has also grown from 46% to 53%.

Moreover, there is a positive trend in understanding the basics of information security. The share of those who understand risks of password and code key propagation to third parties has significantly increased (from 10% to 75%). One can also see the increased share of those who do not believe that the Internet allows remaining anonymous (growth from 43% to 55%). At the same time, there is a decrease in the level of information security basics with regard to some judgements. For example, the share of respondents who realize the risks of posting personal information on the Internet decreased from 67% to 59%.

Table 2.7.10. *Assessment of Media Literacy Level (Quantitative Data on "Competent Answers")*

No	Judgements:	"Competent" answer	2021	2023
1	Newspapers, TV channels and Internet portals in Tajikistan are both state-run and private	*True*	72%	↑ **76%**
2	Only the state-run media can make quality products	*False*	19%	↑ **22%**
3	Internet is primarily a source for entertainment and communication	*False*	23%	↑ **28%**
4	Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	*False*	46%	↑ **53%**
5	When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	*True*	40%	= **40%**
6	Internet allows you to keep anonymity - the user cannot be identified	*False*	43%	↑ **55%**
7	Some messages/information posted by a person online can negatively affect his/her career and private life	*True*	67%	↓ **59%**
8	It is sometimes permissible to give someone information about your passwords, code keys (bank, internet, etc.)	*False*	10%	↑ **75%**

Since skills in understanding media functioning are one of the components of media literacy, a media literacy assessment index was created for each survey participant based on their individual responses. This index was formed based on judgment scores that reflect how "competent" respondents were in responding to the judgments provided.

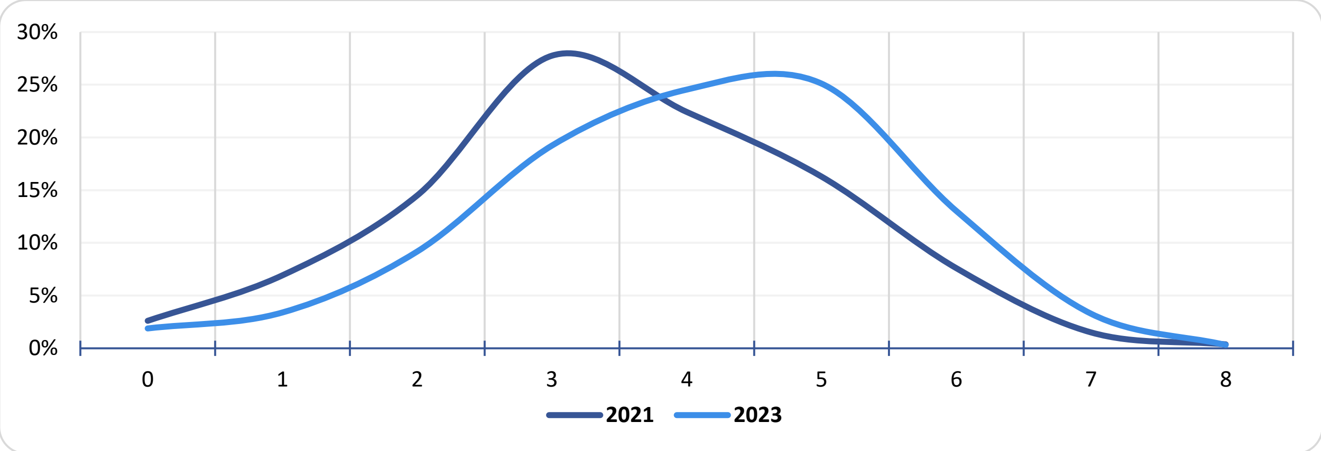
As noted above, for each of the eight judgments, a "competent" response was predetermined, corresponding to a high level of media awareness. In case the respondent's opinion coincided with the "competent" answer, he/she was awarded 1 point. Thus, based on the number of coincidences with the "reference" answers, an index of the media literacy level of each respondent was calculated. The maximum possible number of points is 8 (with 100% coincidence with all "correct" answers), the minimum - 0 (no coincidence with 'correct" answers).

Thus, the data analysis shows certain progress in increasing the level of media literacy of the population of the Republic of Tajikistan during the review period. In particular, the share of those who scored 0-3 points decreased from 52% in 2021 to 34% in 2023. At the same time, the share of respondents with high scores varying from 4 to 8 points increased from 48% to 66%. Moreover, if in 2021 the highest proportion of respondents scored 3 points (28%), then in 2023 the group where respondents scored 5 points (25%) took the lead. None of the respondents scored maximum 8 points.

As a result, **the countrywise average score increased from 3.5 in 2021 to 4.1 in 2023,** indicating an increase in the media literacy level of the population of Tajikistan.

Countrywise average score:
2021 – 3,5
2023 – 4,1

Diagram 2.7.10.5. *Distribution of Respondents by Media Literacy Index (Percentage Share in Terms of Index Value)*

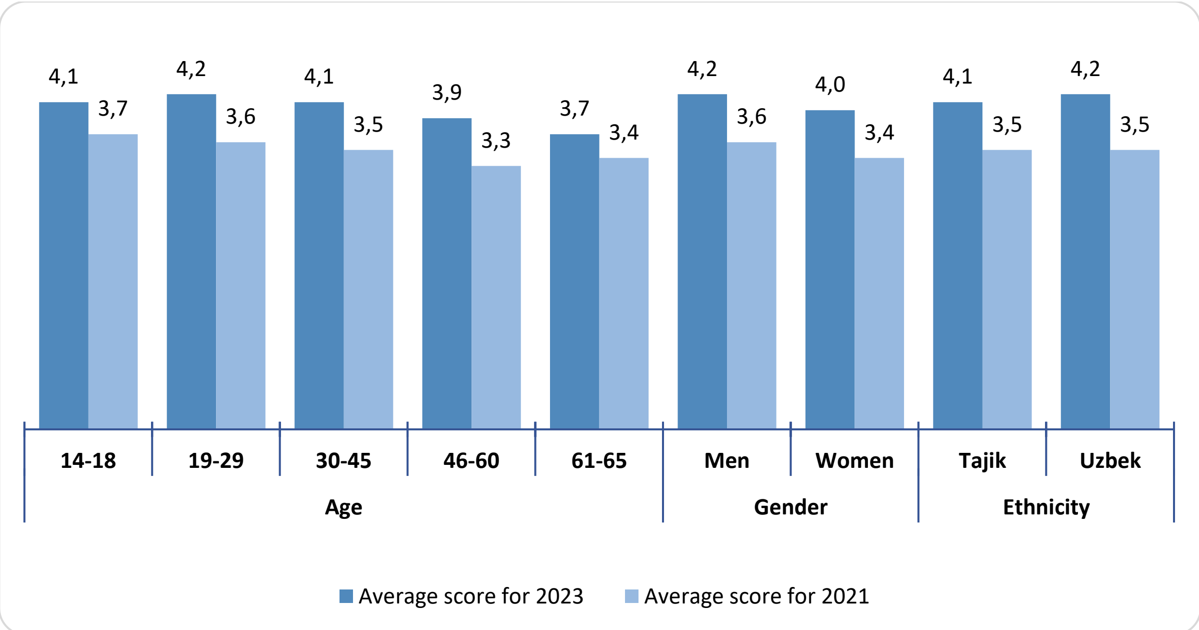


Data by age group, gender and ethnicity allow us to analyze more thoroughly the dynamics of media literacy among the population of Tajikistan.

- Positive dynamics in assessing the level of media literacy can be seen in all analyzed age groups. The highest growth of the indicator is noted in the groups aged 14-18 (from 3.7 to 4.1 points) and 19-29 years old (from 3.6 to 4.2 points).
- Media literacy level increase is also observed among men and women. At that, men demonstrate higher indicators than women both in 2021 (3.6 vs. 3.4 points) and in 2023 (4.2 vs. 4.0 points).
- Representatives of ethnic groups - Tajiks and Uzbeks - demonstrate similar growth pattern of media literacy. However, in 2023 the average score among Uzbeks is slightly higher (4.2 vs. 4.1 for Tajiks).

Thus, the greatest increase in figures is observed in young age groups. Nevertheless, the persistent gender gap requires the development of measures to increase media literacy among the female population.

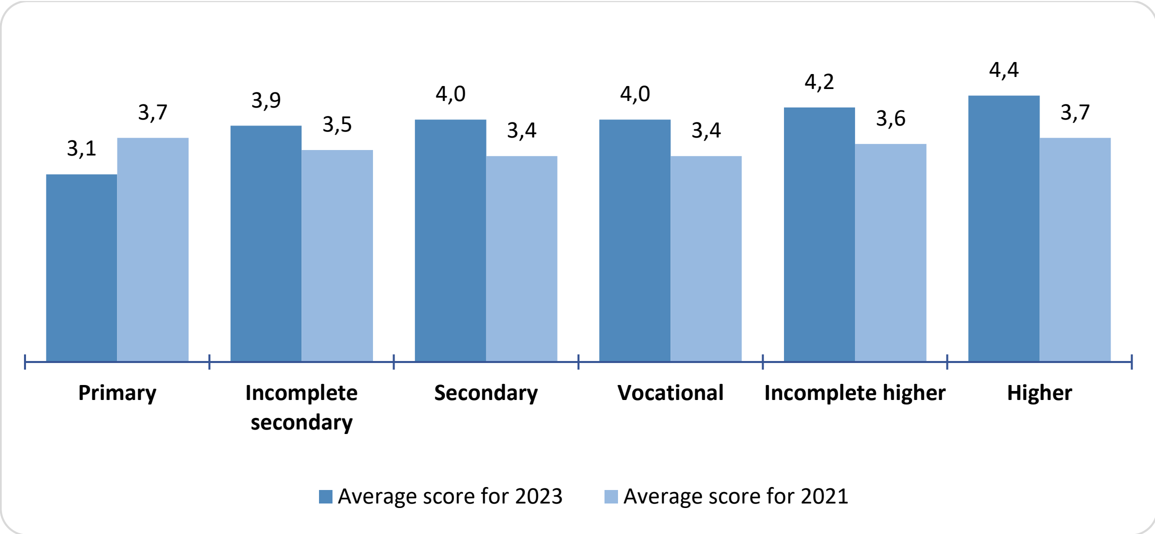
Diagram 2.7.10.6. *Average Score of Respondents on Media Literacy Index by Age, Gender and Ethnicity*



Analysis of the media literacy dynamics by educational groups shows the following:

- There is a direct relationship between the level of education and the media literacy index: the higher the level of education, the higher the score on this index.
- The highest positive dynamics can be traced in the groups with incomplete higher education (from 3.6 to 4.2) and complete higher education (from 3.7 to 4.4).
- In contrast, the group with primary education shows a decrease in the media literacy index in 2023, from 3.7 to 3.1.

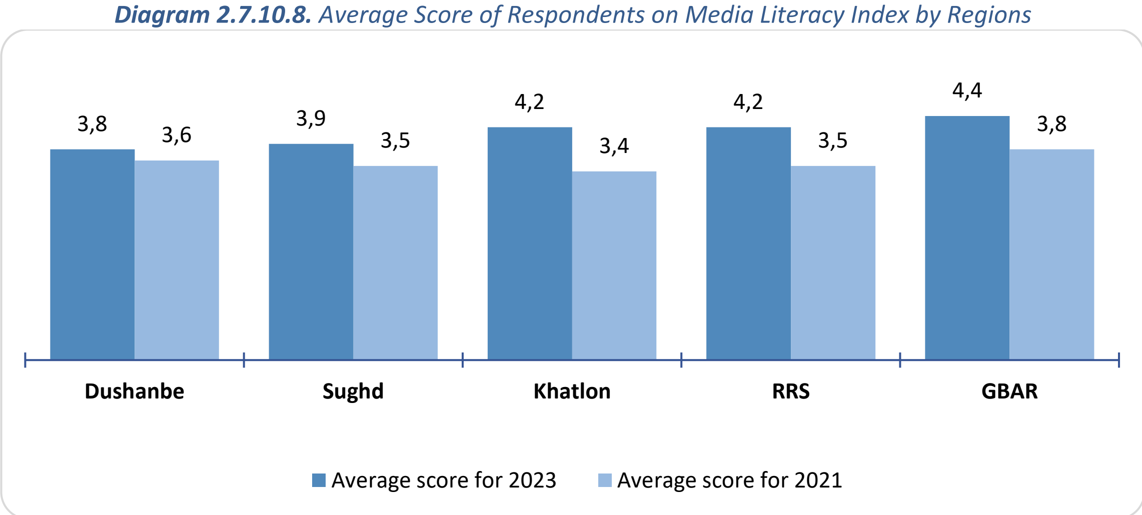
Diagram 2.7.10.7. *Average Score of Respondents on Media Literacy Index by Education*



Analysis of the dynamics of media literacy level of the population by regions of Tajikistan for the period 2021-2023 reveals the following trends:

- All regions of the Republic of Tajikistan have a growth pattern of the average score with respect to the media literacy index during the period from 2021 to 2023.
- In 2021, the highest media literacy level was demonstrated by residents of GBAR (3.8 points), the lowest - by residents of Khatlon (3.4 points). By 2023, the gap between regions has narrowed: although GBAR is still the leader (4.4 points), Khatlon (from 3.4 to 4.2 points) and RRS (from 3.5 to 4.2 points) have shown a significant increase in figures.
- The lowest increase is noted in Dushanbe (from 3.6 to 3.8 points).

Diagram 2.7.10.8. *Average Score of Respondents on Media Literacy Index by Regions*



Assessment of Media Literacy and Information Culture Level

Comparing the data over the last 3 years, one can see the tendencies as below:

- Understanding the importance of using different sources of information increased from 65% in 2019 to 83% in 2023;
- At the same time, the proportion of those who tend to analyze media with respect to their interest decreased from 44% to 29%;
- Information overload fatigue increased from 34% to 41%;
- Social media content filtering skills increased from 0% to 49-53%.

Table 2.7.11. *Assessment of Media Literacy and Information Culture Level*

	Percentage of Agreeable		
	2019	2021	2023
I can easily and quickly find any information I need	64%	74%	58%
Usually I know where (in what source) I can find the relevant information	60%	75%	67%
I often compare information from different sources to verify it	31%	47%	46%
I can easily determine what information contains advertising	27%	47%	46%
There are media (TV channels, newspapers, magazines, radio stations, etc.) that I trust and those I do not trust	51%	69%	69%
The media should report only the facts, and what these facts mean, everyone will decide for his/her own	54%	74%	60%
I think the more different sources of information, the better	65%	78%	83%
Information reports from different sources often contradict each other	39%	56%	48%
To assess the information from newspapers, magazines, TV, radio, etc., I try to find out whose interests this media represents, who is behind it	44%	40%	29%
Media should be responsible for poor quality information just as the producer is responsible for poor quality products/services	58%	83%	80%
I'm used to believing what the newspapers say, what they say on TV and radio	31%	63%	60%
I often ask relatives or acquaintances to find the information I need	36%	40%	58%
There have been instances where I have lost time or money due to incorrect information in the media	20%	19%	12%
I often experience fatigue from a loads of information	34%	40%	41%
Different media often repeat the same information, little different from each other	51%	62%	63%
I know how to arrange my social media feed to read only information that interests me	-	46%	49%
Having received a friend request in the social network from a stranger, I first check the profile, and then make a decision	-	54%	53%
When posting other people's content (information, pictures, videos, etc.) on social media it is necessary to give a link to the source	-	47%	44%

2.8. Qualitative Survey Results

2.8.1. Media Consumption

As follows from the analysis of experts' answers about the characteristics of modern media consumption in Tajikistan, the following conclusions can be drawn:

Firstly, there are significant differences between urban and rural areas; consumption of the Internet and social networks prevails in urban areas, while in rural areas people prefer watching TV and listening to the radio.
Secondly, there are generational differences: young people prefer online media, while the older generation prefers traditional media.
Thirdly, in general, there is a tendency towards decrease in interest in television, radio and newspapers and increase in the popularity of the Internet and social networks.
Fourthly, media consumption directly depends on people's education and their access to media resources.
Fifthly, there are significant regional differences in audience preferences, which requires a differentiated approach to media content. In general, according to experts, there is a low level of media consumption in the country, only 30-40% of the population is interested in the news.

"Media consumption in our country differs from the developed countries. In most cases, young people prefer to consume information online, and the older generation uses the Internet less, they prefer to consume information on TV and radio. One can say that level of consumption depends upon the age. I think that in our country media consumption is not really relevant for people who have ordinary life, I mean housewives, construction workers as well as those who are employed in the field of agriculture. Ordinary people who have a simple life without any significant changes. I would say that we have a maximum of 30 to 40% of people in our country who are interested in news, and etc."

"We have a very complicated system of media consumption in the country; interests and necessities with regard to media consumption in the cities differ completely from those in the regions; in different locations people read different media. That is, people have different interests; preferences in the cities differ a lot from regional preferences, and in remote regions the situation looks quite another. Media consumption depends on the region and on people's education, as well as on their access to certain resources, I mean the Internet, television, newspaper, etc. In general, if we summarize all the data, it should be noted that this issue is complicated, because, I would like to repeat, that all the parameters differ by regions, the audience is different as well. Television is different from social networks, social networks differ from websites, websites differ from newspapers and we have to make content for different audiences. Having summarized the abovementioned, one can state that today we see social media user growth. On social media the audience gets the necessary information. It is also worth noting that the audience using websites has started to decrease, fewer people visit websites, while the audience of social networks has started to increase. If we talk about traditional media (newspapers, TV, radio), they are also losing popularity, including websites and Internet portals. People are less often willing to turn on TV and switch channels, as it is more convenient to find and watch/read the necessary information in social networks, messengers and telegram channel".

"In rural areas people prefer TV, they watch it in the evening; few people surf the Internet, because penetration of the Internet is not so high. Moreover, they use the Internet most often to stay connected with relatives, not to consume any information. In the cities people use the Internet more often. TV is watched mainly by older people aged over 50. The younger generation still consumes information via the Internet".

The population's engagement with different types of content. The population is most interested in news about various accidents, incidents and disasters, as well as political events. The most popular sources of information are social networks, news websites and telegram channels, although television is still in demand, especially in rural areas. At the same time, online media is growing in popularity among young people. In addition, experts note a tendency to the interest in entertainment content, crime news, family dramas, instead of analytical materials. Thus, according to experts, there is a shift in audience preferences towards light entertainment formats, which reflects the general low level of media literacy among the population.

"Usually our population is more interested in incidents, disasters and political events. According to my observations, I can say that people consume information more from Facebook and Parviz TV, but Parviz TV is not media, it is just an information source for people. Additionally, Asia Plus, Radio Ozodi. People watch television as well, but mainly in rural areas. Young people almost don't watch TV".

"Continue answering the first question about what people watch and read most often, it should be noted that it is criminal news and comedies, family dramas and disagreements between daughters-in-law and mothers-in-law, etc. Thus, this suggests that media consumption depends on the level of education. Taste of the Tajik audience is changing from day to day, that is, if earlier you could see people who consume and prefer serious content: politics, analytics, economics, etc., now their number has decreased, while the number of people, who pay more attention to entertainment and interesting stories, light crime topics, murders, etc., is increasing. In general, people began to perceive and be interested in light reading materials, easy topics".

Peculiarities of media consumption in terms of age, language and region. Based on the comments above, the following general aspects of media consumption in Tajikistan can be identified by age, region and language:

In general, consumption of Tajik-language content is predominant, especially for news and topics related to Tajikistan. However, Russian-language media have more credibility.

One can see interest in incident news and yellow press, especially among young people. In the meantime, the older generation is more interested in political and economic topics. In big cities and the capital, media access is wider and content is consumed in different languages. In rural areas, television is often the main source of news.

With the development of the Internet, young people are increasingly moving to online media and social networks. At the same time, there is a demand for educational and practically useful content. Mass media have not yet taken into account differences in interests of the audience by age, region and other factors. One should better study audience necessities and adapt the content to them. In general, there is a trend towards personalization and fragmentation of media consumption with the growth of the Internet and social networks.

"In any case, in Tajikistan people read and consume the content mainly in the Tajik language, although they trust the Russian-language media more. What they prefer to read, I think it is probably about any emergencies, incidents, yellow press rather than economic or political news. Everything that is related to emergencies, incidents (what, for example, Parviz TV currently broadcasts) is consumed better than what the official media present (already verified information, etc.)".

"We have a demand for the Tajik segment, because many people know the Tajik language well, but they do not have opportunity to get the necessary information, because we have very few Tajik media. For example, there is radio "Zomin", but it is not our national radio, there is a Tajik service "Asia-Plus" and that is all, I mean no other online resources. Now we are talking about reading online resources that attract people, such as Ozodi news, Asia-Plus.
Nowadays many people speak Russian and content in the Russian language has more coverage because the whole region of Central Asia and in Russia reads it. However, if we talk only about Tajikistan, an increasing number of people want to receive information more in Tajik and less in Russian. The problem of our mass media is that they do not know what our audience wants; they should know its preferences and deliver the necessary information in a language preferred by the audience. The consumer, i.e. a person, if he/she wants to learn French, he can do it, if not – he/she must not, the same applies to other languages.
As for age, we have already said that older people read in Russian and they are more interested in serious social economic and political topics, while the younger audience is more interested in so-called "light topics"; it is not topics about food, or games, but in general easy presentation of information. They are often interested in educational opportunities, financing courses, how to go with a car to the right direction, etc.
The issue of regions is quite serious and the most difficult, because as I have already mentioned above the necessities differ depending on the city, region, or village. In this regard, it turns out that in several developed cities the opportunities for media consumption are wider, including the capitals, where people read in Russian, English and Tajik, have good Internet connection, access to newspapers, and to all other nonpopular media. Despite the low popularity of TV, in remote regions there is still access to television. Thus, one can say that Tajik state TV is more used in the regions because they do not have

any choice. However, young people there have also learned to use the Internet and consume the information of their interest".

Reduction of television role in favor of the Internet. According to experts, there is a tendency in Tajikistan to decrease the popularity of television and increase the popularity of the Internet as a source of information and entertainment. However, this process is going on slowly and irregularly.

On the one hand, in big cities, especially among young people and people with high incomes, the number of those who prefer Internet to television is growing. This is due to the fact that the Internet provides more opportunities for obtaining up-to-date information and entertainment. On the other hand, for the country as a whole, television is still the most popular source of information. This is explained by the fact that television is more accessible to the population, especially in rural areas. In addition, it broadcasts in the Tajik language and has popular local content such as movies, TV series and shows.

High costs of Internet services in Tajikistan also restrain its growth. Therefore, in the coming years, television will retain its leading position as the main source of information and entertainment for the majority of the population. However, as costs of the Internet decrease and the population's income grows, its popularity will steadily increase, especially among young people.

"For example, my family, or I personally, hardly ever watch TV. The main source for me is the Internet. There are families in Dushanbe who can afford the Internet and usually these families watch less TV. I should say, there are also families that have less opportunities and less access to the Internet, such families prefer TV.

"Analyzing our country with respect to Internet service costs, it is in the top ten countries with the most expensive Internet costs. Therefore, not everyone can afford paying for quality Internet to watch both videos and news. In other developed countries people watch less TV, and even if they do, they choose TV channels, I mean the media, which deal with news on TV, they watch them because these channels provide the most reliable and relevant information. Examples of such channels: BBC, Euronews, Aljazeera - this is television, they are the first to provide actual information, so people watch them. We also have such a tendency, but for several reasons, television is still more popular here, because it broadcasts in Tajik and is more accessible to everyone. Since in the cities you have to pay for cable TV, but in the regions TV is generally free. The Internet comes to the fore; however television still exists, because there is the content on TV preferred by the audience, for example, feature films, TV series, movies, interesting programs, etc."

"In any case, television has more audience and credibility, and in Tajikistan, for at least next 5 years, its positions will be as high as 90%".

The language preference for social networks and media. In Tajikistan, there is a steady demand for media content in Tajik despite the spread of the Russian language on the Internet and social networks. In particular, content in Tajik is more popular in social networks and when reading news. Information in Russian is consumed mainly by those who live outside Tajikistan. Within the country, the Tajik language is favored because it is used by the vast majority of the population. At the same time, the Russian language is still associated with a higher level of education and is a kind of "verification" of information reliability. Therefore, educated part of the population of Tajikistan is often bilingual. Numerous radio stations also broadcast in Tajik, especially in the regions. This is due to the fact that radio remains popular among the older generation as well as motorists.

"The content in Tajik is more widely read, listened to and watched, and we can even judge by ourselves that Tajik-language materials are better consumed than Russian-language materials. People read more Russian-language materials related to traditions and culture, and most likely people read them being outside Tajikistan in order to know a little more about Tajikistan. The fact is that social networks are better at working with the Russian-language edition and that is why people believe that the Russian-language edition is like the highest resource, and can be trusted. If suddenly something needs to be checked, people turn to Russian-language sources. Thus, such an opinion that 'Russian-speaking' means more educated still exists in our society. Everyone tries to send their children to Russian-speaking school, because they think that those who know Russian are more educated. Thus, here we can observe such a situation, that social networks in the Russian language

are more consumed. It also depends on educational level of the population: those who use social networks, they can more or less use gadgets, and, consequently, they are usually bilingual, they live in the city, so they consume so and so".

"Of course, there exist Russian and Uzbek TV, but citizens want to receive news only in Tajik. Many people read information in Uzbek and other languages, it is mainly those who live in regions with Uzbek borders, or in some regions where ethnic Uzbeks live, but the preference remains for the Tajik language".

"Radio is one of the traditional media, and despite the decline in popularity, many people still listen to the radio in our country, mainly motorists in big cities, as well as in regions. Older people often use radio; it is some kind of a habit when they had no other source of information except for radio. They continue to listen. There are private radio stations, mainly in Sughd region, they broadcast completely in Tajik, and though have only several programs in Russian. I think that all radio programs are mostly in Tajik, and audience is satisfied with this".

According to experts, local news and analytical programs as well as Russian media are the most popular in Tajikistan. The vast majority of the population prefers local media because they broadcast in Tajik and cover events within the country. Regional TV channels are particularly popular, for example, in Sughd Province. Russian media are also in persistently high demand throughout Tajikistan due to the close historical relationship between the two countries. Foreign news and analytical programs (such as Euronews) are watched by only a small part of the population, mainly in large cities. The main interest in foreign channels is focused on entertainment content such as movies, TV series and cartoons.

"Our news is not different from each other, they are similar. Russian programs are also in demand. There are also people who watch Euronews or other foreign news and programs, but their share is smaller, I would say it is about 10% throughout the country. As for foreign channels, people watch movies, TV series, children's channels with cartoons".

"I am sure that in Sughd everyone watches local TV channels, because there are several of them; more than seven or eight private TV channels in Khujand, they also cover neighboring cities such as Gafurov and Istaravshan, so people there prefer watching regional TV channels. As for Russian programs, we can say that they are watched everywhere, it is impossible to even mark any region, because everywhere they watch Russian TV, read online Russian Internet resources; apart from Russian channels, we have Uzbek, Turkish channels, etc.".

Foreign media to be reduced or increased in Tajikistan. In general, experts believe that the role of Tajikistan's national media needs to be strengthened so that they can compete with foreign sources of information. For this purpose, it is important to develop private TV channels alongside with the state ones so that the media landscape becomes more diverse.

At the same time, one should not completely ban foreign broadcasting, as this would deprive citizens of the opportunity to receive alternative information and analyze the situation by themselves. Particularly in case with Russian media, which are actively engaged in propaganda, it is important to ensure parallel broadcasting of national and foreign channels.

Such a comprehensive approach, combining the increase of domestic media and presence of foreign sources, will create a media landscape where Tajik citizens can receive objective information from different sources and make conscious choice. This is important for developing critical thinking in society and countering manipulation by certain foreign media.

"I think that the presence of Russian media should be increased. They have a lot of propaganda about Ukrainian events now. Russia shows programs for its own benefit, so that people believe in Russia. But I should, they don't always show the truth. Our citizens see it and believe it."

"It is necessary to make parallel broadcasting, so that the national media can operate as a counterbalance to the regional media and people can understand, make a choice and analyze by themselves. Of course, that's no good when propaganda of other countries openly work and prevails in our country, especially Russian propaganda, but we cannot completely shut it down. The best option is to strengthen our national media so that they can counter Russian channels and not only Russian, but also American, European and Chinese channels. However, at the moment the situation is quite different, because foreign, Russian and American media that broadcast in Tajikistan have a freer position than the national one, and this negatively affects the society."

"It is necessary to increase local TV channels and make them private, because we have no private TV channels at all now. There are only state TV channels. There are private TV channels in the north and they are all regional, none of them has a license for republican broadcasting."

According to experts, Russian media and content in the information field of Tajikistan have a high level of penetration. This is due to a number of factors shown below.

Firstly, the population has become used to watching Russian TV channels and programs over a number of years. Russian content is considered to be of higher quality and more attractive than local content.

Secondly, there is a competitive weakness of national media and poorly developed domestic information products.

Thirdly, pro-Russian bloggers and opinion leaders play an active role in disseminating the Russian agenda, building social media trends.

We need a comprehensive approach to remedy the situation. It is important to increase the media literacy of citizens so that they can distinguish objective information from propaganda. It is also essential to develop competitive national media and improve the quality of domestic content. We should strengthen the state control over the activities of bloggers and opinion leaders who disseminate pro-Russian narratives. Taken as a whole, decisive and coordinated actions are required to strengthen the country's information sovereignty.

"The fact is that many people in our country only switch from one channel to another and then go straight to Russian channels out of habit. For example, I grew up with Russian TV programs. We have good analysts who could somehow inform our people and explain where the truth is and where the lie is, we could bring it to light and let citizens know it."

"It should be noted that Russia and any other country in the world, including the West (Iran, Turkey), which work well enough in this direction, spread their propaganda with the help of media, for example, movies, programs; generally it is typical to media and no one can forbid it. To say that Russia spreads propaganda only in other countries, including Tajikistan, is wrong, but the percentage of our citizens dependent on Russian TV channels is very high. It is necessary to give opportunities for new alternatives."

"It is very important that the state starts controlling the so-called "bloggers". They conduct very active, aggressive propaganda of the Russian media on the Internet, on Tik-Tok, Instagram, Telegram – this is what the state should control. Nowadays there are a lot of such bloggers and they are quite aggressive. I consider that it is no good when any foreign state tries to rouse some kind of public opinion with the help of bloggers, because you don't know what kind of direction they will take tomorrow. In any case, I believe that it is the influence of a foreign state on public opinion in the country and it should be controlled today. Now there is no control."

Willingness to pay for access to interesting programs, shows, intellectual products. According to expert opinions, the general population of Tajikistan is not yet ready to pay for access to quality intellectual and author's content in the media. This is due to a number of factors as below:

Firstly, people are used to free content and are not inclined to change their media consumption habits.

Secondly, due to low standard of living, most people give preferences to primary needs rather than paying for media content.

Thirdly, there is a lack of interest in intellectual analytics on the part of mass audience.

At the same time, there is a certain potential for paid models. Urban educated residents are willing to pay small amounts. There is also demand for analytics from business and international organizations. As prosperity grows, the number of potential subscribers may increase.

A gradual transition to paid models in Tajikistan's media is possible, but requires the study of the target audience. Currently, free content prevails.

"I think that many people are not yet ready to pay for access to programs and intellectual products. And as for paid author's content, no, we have everything for free."

"This is a very controversial issue, we have been discussing this point throughout the year in our company to make some of our products paid, but so far we have not decided to do it and probably will not come to this decision in the near future, because our citizens are not ready to pay for any information. If some part of population is ready to pay, then it would be a low share of those. There are two influencing factors and I do not think that any project can be implemented despite the fact that the poverty level is decreasing and the number of poor people is decreasing, too, but many people earn only for living and they think first of all about food and their children, not about news. The second factor is, certainly, the interest of the Tajik audience in news generally. We have paid news in English, where the buyers are international organizations."

"I have conducted some research for my thesis, where I found out that people living in cities are ready to pay monthly up to 100 somoni on average to get some exclusive information, and in villages they are not ready for it, because the level of living is lower, they are sure that what they have is enough for now. Intelligent population living in cities earns more, and correspondingly, they are ready to pay on average up to 100 somoni, not more, from 50 to 100 somoni per month, that is 5-10 dollars. It would also be good for the media, but unless the number of those who are ready to pay is small, no one has thought about making paid content. We don't sell content. We make it to order for some private companies and so on, but we don't sell it."

Top 5 products for which users are willing to pay. According to experts, the leading position is occupied by entertainment content. In particular, residents are willing to pay for access to music, movies and games. This point of view is supported by two experts at once, who put this product in the first or third place in the rating. The second place by popularity is occupied by educational content. According to experts, students and schoolchildren willingly pay for access to online courses, learning platforms and other educational resources. This position is shared by two respondents.
Next in the rating are audiobooks and other entertainment content. According to expert opinions, a part of the audience is also ready to pay for it. As for news and analytical content, opinions vary. One expert believes that there is still potential for paid products in this area, while others are skeptical about people's willingness to pay for such information.

"I believe that people are surely willing to pay for education. I think educational programs are the most important. As for exclusive investigations, people perhaps will pay for it as well, but only a small number of them. With regard to news and analytics, I think people are ready to pay for it. That's the second thing. Now the third –please switch on the news, and from entertainment content – games."

"Our population is not ready to pay for news, perhaps only 5-6%; educational programs can take the second place, as for news - it is in the last place, audiobooks take, probably, the fourth place."

"In Dushanbe, the first place is occupied probably by music or movies. Educational information takes the second place; it may be students and schoolchildren who most often use educational websites. It can be foreign language study or reading books. The third place is occupied probably by games; now many people have mobile games, even adults have games. News is in the fourth place. In the fifth place, I don't know what else you can say, well, probably entertainment information. It can be cooking, i.e. information about household problems and needs."

Most trusted information channels. The question about which sources of information are more trusted by the residents of Tajikistan does not have an unambiguous answer. According to experts, television still holds the leading position. Despite the rapid growth of Internet popularity, especially among young people, television remains the key channel for receiving news and information for many people. This is especially true in regions where access to the Internet is still limited. At the same time, the Internet as a source of information is rapidly gaining momentum. According to experts, online news spreads much faster than on television. This trend is especially noticeable among the young population in large cities.
As for traditional media, the radio, according to one of the respondents, may be ahead of the printed press in terms of credibility. Newspapers and magazines, despite their retaining authority, are becoming less of an issue in the eyes of the audience. Experts note an interesting fact that mass text messaging from government agencies have a high degree of credibility. This is probably due to their official status.

“If we talk about information, then I should say that our society prefers the Internet to television. News spreads faster online than on television. Since I don't watch TV, the source for me is naturally the information websites on the Internet. Most of my friends, colleagues and relatives prefer the Internet as well. Therefore, I personally have more credibility to information websites. Print media can also be considered as reliable, but, you see, many people don't read newspapers anymore. Print media need more time to publish the news and information, and when it comes out, the news can already irrelevant. With every passing day, the authority of newspapers is decreasing. I also trust the radio, but not all sources. I fully trust mass text messaging of government agencies”.

“Now many people trust information websites, for example, the website Asia plus as well as our site Vecherka have readers. According to the research, television as a source takes the first place. I agree, more people trust, probably, television, because one can watch information on TV for free, first of all, and secondly, everyone has a TV set, while not everyone has Internet access in the regions. I consider that the third place is occupied by the radio rather than printed press. In most cases people prefer watching TV, consequently, I think that the highest level of credibility is to television.”

Credibility to media

Analyzing the experts' statements, we can identify several key points about credibility of population to various sources of information.

Firstly, state and republican mass media are the most trusted. This is explained by the fact that they are perceived as official sources of information from the authorities.
Secondly, regional media are also trusted, especially in those regions where there are developed local media (in Sughd, for example).
Thirdly, privately-owned domestic media have a certain audience, although their consumption is less than that of the state media.
Fourthly, people have less credibility to foreign, particularly Russian, media, considering their information to be not always reliable.
Fifthly, today one can see growing credibility to Internet websites as a source of information. At the same time, the radio audience is reducing.

“Naturally, state and republican TV channels have the highest level of credibility. In the first place we have state and republican channels. If, for example, we consider the Sughd region, where broadcast regional media and they are well developed, then, I think, people have more credibility to them than to state ones. In Khatlon there are no such sources, so the state media is prevailing there, but in Sughd region there are state and regional media, I think they trust the regional media more.”

“Whether we want it or not, the state media is more trusted and occupies the first place; the second place is occupied by different media, and then follow, probably, foreign and Russian media. Most likely, if we analyze it, the quantitative data will look like that".

“Of course, as a citizen of the republic, many people trust their country and “State” information will occupy the first place. Today one can also see the high level of credibility to the press on the Internet. Radio can be trusted as well, but there are not so many listeners. Mostly radio listeners are taxi drivers or motorists. Unfortunately, our people trust Russian information, too, although this information is not always reliable.”

Results of the study show a trend of declining public credibility to the media in Tajikistan.

Firstly, there is increasing control and restrictions on journalists, which leads to poor quality of journalism and decline of public`s trust.
Secondly, there is a growing gap between information in the media and real situations in the country. People understand that the media, including private ones, do not fully cover and analyze social causes.

Thirdly, state media, due to their policy, present information in a biased manner, and private media cannot be fully objective as well.
Fourthly, surveys show that many people believe that journalists distort the truth and are not trustworthy.

"Our trust in media is decreasing, the ratings are low. There are still competent journalists and specialists in our republic, but they are restricted in many ways. Our media is growing with the state information, the tables in this research clearly show it."

"Credibility to media, both state and private, is decreasing, because people see that real life differs a lot from what is shown and told by the media, including private media, for example, Asia-Plus. It is clear that state media have a different policy and naturally they do not show all the problems of the society, while private media prefer talking about their own problems. Media cannot cover many issues, including politics, authorities; they can't tell the whole truth for some reasons and that is why the overall credibility is decreasing. I want to note that once a month I try to communicate with strangers on the streets, with taxi drivers or people I meet on my way to work. I try to find out how much they are interested in media, how much they trust; in these circumstances I do not say that I am a journalist, practically everyone says that all journalists lie and hide the truth, it just shows the level of credibility and it is decreasing dramatically."

Analyzing opinions of experts, we can state a tendency of decreasing objectivity of events coverage in Tajik media for the last 2 years. This is due to the increasing censorship and new taboo topics. The situation has worsened in many regions because of increased restrictions for journalists.

Experts emphasize the importance of media literacy development among the population starting from school age. This will help people to critically evaluate information in the media. To increase media literacy, it is necessary to hold educational events, masterclasses and trainings with the involvement of educational institutions and government agencies.

There is a shortage of media literacy specialists, but available experts can be involved in special training programs. Thus, the experts propose a comprehensive set of measures to develop media literacy in order to solve the problem of declining objectivity of the media.

"Media in Tajikistan cover events less objectively today than they did 2 years ago because censorship still exists."

"So, it concerns regions, and I will answer this question: the situation has become much worse than 2 years ago, our media cover events less objectively, because there are new red lines in the media, new taboo topics, new faces about whom it is forbidden to write any information, so taking the abovementioned into account as well as the restrictions that we have had over the last 2 years, it is worth noting that the coverage has become much worse.
Once we talked with teachers and professors about education; a talk show on similar topics was held, where the issues of media literacy were discussed, experts said that media literacy simply needs to be integrated in school curricula, and in fact it is very important."

"Our citizens should start learning financial literacy and media literacy from school-days. If we wait for everyone to grow up, we will lose a whole generation. To eliminate such problems, it is necessary to hold more interesting programs, more offline meetings, as well as conduct trainings in universities and state institutions using agitation; it can also be useful to arrange tours. There are few specialists in Tajikistan dealing with this, but if there are organized programs, then they are ready to give lectures or provide training. It is necessary to consider this issue and discuss the organization and implementation of such training programs."

2.8.2. Media Literacy of Population

Media Literacy Concept

Due to rapid development of AI technologies, the concept of media literacy needs to be expanded and reconsidered.

First of all, as AI tools become more accessible to people at large, it is necessary to develop practical skills of their usage. People need to understand the capabilities of these technologies and be able to apply them competently in everyday life.

However, what is more important is to promote critical thinking and an informed approach to information. Abilities to call in question, analyze sources, distinguish between the work of AI and human creativity are the key media literacy skills today. This applies to both texts and images generated by neural networks.

There is a necessity for systematic awareness-building of the population relating to principles of AI functioning. People should understand strengths and weaknesses of these technologies, as well as possible risks and threats. It is important to learn how to correctly formulate tasks for AI in order to obtain qualitative results.

Expanding media literacy with a focus on human-AI interaction is the need of the hour. It will help to avoid many dangers and take advantage of technological progress for the development of individuals and society.

"I would like to emphasize this point, because access to artificial intelligence tools among the population is increasing. I promote this at trainings and workshops and often tell people that they should already use them.
The key to media literacy is critical thinking. It's not the knowledge how to set up a camera, but the ability to bring the information you receive into question, as well as understanding how this content is produce, for example, with help of generative neural networks - it is artificial intelligence, a type of what we call artificial intelligence. For example, how to understand that this photo was generated by a neural network, and another photo was taken with a real camera by a real person. How to recognize all these peculiarities, how to interpret photos, i.e. we often have an intuitive understanding of what is in the photo; for example, we look at a photo and understand whether it is beautiful or not, good looking or not good looking, but if you analyze it more thoroughly, you can get a lot of data from one photo. For example, we teach this at factchecking trainings, even such small things as, for instance, how the shadow of a pole falls can tell us what time of day the photo was taken. There are also online resources for such purposes, which will help to identify the time a photo was taken, to identify these objects. This is what most people do not know, even those who are professionally engaged in content production. I mean journalists, bloggers, etc."

"We have two resources that operate actively: Mediasor.tch, which belongs to our organization Public Organization "Media Literacy and Digital Culture" and Factchecking.tch. There are other organizations that do some activities in the field of media literacy and digital literacy and promote their materials through social networks. However, except from accounts in various social networks, we have electronic resources, certain websites that are dedicated to this topic. But it is not enough, as a lot of people are still far from media literacy. Artificial intelligence tools is a new phenomenon for Tajikistan as well. With this regard, it is also necessary to conduct targeted, explanatory work and awareness-building among the population relating such issues as: what is artificial intelligence, why do we need it, what it can do. People should also learn the main skills such as: how to ask the right question to get the right answer from artificial intelligence, i.e. tips for writing prompts. I believe it is going to be one of the main directions in media literacy in the future."

Credibility to Russian Mass Media

Based on the following expert statements, it can be concluded that historically a significant part of the population in Tajikistan received information from Russian media and trusted them more than local media, as Russian media seemed to be more professional and of higher quality. However, recently, especially after the start of Russia's war against Ukraine, one can see a trend of decreasing credibility to Russian media, primarily among young people who have access to the Internet. Young people have become more critical of information from Russian sources, considering it more as propaganda than facts; they are looking for alternative media. At the same time, the older generation, which is mainly television-oriented and has limited access to other sources of information, has a relatively high level of credibility to the Russian media. Thus, the decline in trust occurs unevenly in different audience groups and mainly depends on age, language skills and technical capabilities of access to alternative sources of information.

“Well, you know, historically the population of Tajikistan mainly received information from local and Russian media, since they do not have access to other alternative independent sources. On the basis thereof, it means that Russian media are considered to be more professional and of higher quality compared to local media. So, one can say that for the last 50-70 years Russian media were favored. That's why the situation still looks like that and many people, not all, of course, but a lot of them prefer Russian media. However, there is a certain part of the population that already has realized that there are less facts and more propaganda in Russian media and these people are looking for other alternative sources of information."

“I don't think there has been a significant increase. Perhaps one sees fluctuations that happen from time to time, i.e. after some events it increases, after another events it decreases, but it applies more to the point of view of young people who have access to the Internet and actively use it. I have noticed that they stop trusting them, especially after Russian invasion of Ukraine.”

“It should also be mentioned that different age generations have different attitudes towards critical thinking in general and critical attitudes towards information consumption; so the younger generation has a little bit more understanding of critical thinking, while the older generation, which watches only TV, has less. It depends upon language skills as well, because the older and younger generation can speak and understand Russian a bit, but it is not widespread among the younger generation. However, there are people who, except for Russian and Tajik, also know English and understand something at least on the basic level. When they see English-language content, they can consume it to a greater or lesser extent, which also somehow affects their level of perception of the content which is disseminated in social networks."

Media literacy rate

The population of Tajikistan is vulnerable to propaganda a lot (6 points out of 7). This indicates that the media market is actively used to promote a certain agenda and point of view. The level of perception of misinformation is quite high (4.5 points), and it shows that media manipulate public opinion through publishing false information or distorting facts. The population of Tajikistan is exposed to influence from information wars in the media to an average degree (5 points). Compromising information has the least impact (3 points).

***Table 2.8.2.1**. Society Susceptibility to the Below Mentioned Phenomena on a Seven-Point Scale*

	Point
Misinformation	4,5
Propaganda	6
Compromising information	3
Information wars	5

Based on the data presented in the table, the following conclusions can be drawn with respect to media literacy level of the population of Tajikistan:

- Experts give 4 points out of 7 for the ability to recognize fake news, which indicates that the population has this skill on an average level.
- Ability to use fact-checking tools to verify the reliability of information is at a rather low level, 3 points.
- Ability to distinguish between trolls and bots in social networks is estimated at 4 points, which means that the population can deal with this skill on an average level.
- Understanding of the social media algorithms and their influence on the narrative is also at a low level, 3 points.

Thus, according to experts, the weakest points in the media literacy of Tajikistan's population are factchecking skills and understanding of the social media algorithms. This points to the necessity to develop critical thinking and media education.

***Table 2.8.2.2.** Media Literacy Skills of Population*

	Point
Can identify fake news	4
Possess skills of factchecking	3
Can distinguish trolls and bots from real network users	4
Understanding of the social media algorithms and their influence on the narrative	3

According to experts, almost all media outlets in Tajikistan, both state and private, are engaged in spreading disinformation, often unknowingly. This is due to the fact that professional standards of journalism as well as international standards are ignored. As a result, the population is exposed to misinformation. Instead of professional journalism, propaganda, both positive and negative prevails in the country.

Investigative journalism and work with compromising information are poorly developed, as they require deeper analysis and a balanced approach. According to one of the experts, there are only singular example of such work, in particular, the Center for Investigative Reporting.

In the meantime, many journalists and media managers believe that they possess factchecking skills and know how to analyze data and check facts. However, in reality, most of them are not familiar with modern verification tools. There is only one professional resource on factchecking in the country.

The situation is similar with the ability to recognize Internet trolls and bots; these skills are practically absent among the population.

Despite the assurances of media professionals, the level of media literacy in Tajikistan remains extremely low. Journalists and the society should learn more actively the modern approaches to information analysis and fact-checking.

According to experts, the level of credibility of Tajikistan's population to domestic media is extremely low.
In the early 2000`s, credibility to media was higher, but in the last decade the situation has deteriorated considerably. State television remains the main source of information for citizens due to absence of alternatives. Trust in Russian media is somewhat higher than in Tajik media. This is linked with the fact that Russian media, according to experts, present information in a more balanced way, mentioning both positive and negative aspects of the life in the country, while Tajik media focus solely on the positive points, slur over the problems. Such one-sidedness causes distrust of the audience.

“Almost all media, both state and private, spread misinformation consciously or unconsciously. This comes from the fact that professional norms are ignored, international standards of journalism are ignored, too. Therefore, nowadays misinformation has a great influence on the population. The population is susceptible to misinformation. Taking into account the fact that professional and international standards of journalism are absent in our country, the propaganda prevails. It can be seen here there and everywhere, both negative and positive.

Regarding compromising information, it is more analytical activity, particularly, one should find it, weigh one argument against another, analyze it and present to the public. We have very few people dealing with it. There are some, including the Center for Investigative Reporting, the main task of which is to find compromising information.”

"Look, we have a very interesting situation in Tajikistan, in other neighboring countries I have not noticed it. Many of our journalists, owners of media, editors-in-chief, they state that they know all about fact-checking and we should not tell them about it. They are sure that fact-checking is just a new term, while the practice has already existed before; they say they were engaged in data analysis and fact-checking. But the problem is, when you talk to them about available tools we could use, a lot of the abovementioned people don't know them. Based on that, I would like to say that we have only one resource – Factchecking.tch.”

The situation is exactly the same with the skills to differentiate between trolls and bots. The bulk of them can't do it, we have to work on strengthening these skills among the population. When they improve these skills, then they can do it on their own.

Media literacy development in Tajikistan

According to experts, the development of media literacy in Tajikistan is rather slow and faces a number of problems.

The ecosystem of media literacy is very extensive and covers many areas, however only 2-3 of them are developing with the support of international organizations. In these circumstances it is not clear how the materials they have developed will be integrated into the educational process. Many important areas (library literacy, social media literacy, critical thinking) remain actually undeveloped.

Even in the few areas where some activities are carried out (e.g., film literacy), it is often ad hoc from the moment of getting one grant award to another, it lacks systematic approach and in-depth analysis. According to experts, Tajikistan is slightly behind other countries in terms of media literacy.

In order to promote media literacy in Tajikistan, a comprehensive and systematic approach is necessary, working in all directions rather than on one-time project. Every direction should be developed consistently and brought to a high level. This is the only way to make significant progress in this important field.

"Media literacy is actually developing with difficulties, because in most cases only international organizations invest in it, conduct trainings, workshops and elaborate textbooks. When I worked at Internews, we developed a textbook on media literacy for universities, i.e. the process is going on, but whether this textbook is integrated in university curriculum is still unclear."

"The media literacy ecosystem covers more than twenty different areas. We work mainly with two-three areas. For example, no one is dealing with library literacy; few activities conducted on social media literacy improvement. The situation is similar with critical media literacy, visual and digital literacy. People cannot differentiate between digital literacy and internet literacy; these are different things, different areas. Certain work is being carried out in the area of film literacy.

In one way or another, I take part in the development of this field, but I have come to the opinion that we have just started this work. When you start to learn and develop a new field, it is not so easy to understand how you should start and which direction you should take. I came up with opinion that in the area of film literacy we have to do our work over again. We should explain where misinformation is used in movies, how to identify and recognize it. Film literacy should get to the next level of development. As for data literacy, no active works conducted in this direction. Literacy in the field of artificial intelligence technologies is at zero level. We have a lot of work to do. So, we should not do the same work again. Everyone should find a field of interest for him/her and work on it. For example, if we are engaged in film literacy, we should bring this work to perfection, and not give it up upon completion of the grant award program. I think, that media literacy development in Tajikistan, compared to other countries, is poorly developed."

Principal barriers to the development of media literacy

In this expert statement, several principal barriers to media literacy development in Tajikistan can be identified.

Firstly, there is a lack of specialists who speak the Tajik language and understand media literacy issues. This significantly limits the opportunities to educate and train various groups of the population on this topic in their native language.

Secondly, it is necessary to train such specialists and actively involve them in implementation of media literacy programs. Without building expert capacity, it will be difficult to achieve progress.

Thirdly, the expert believes that it is necessary to involve government agencies in this task. Without support from authorities and state participation, it will be difficult to count on systemic and large-scale changes.

Fourthly, there is a lack of learning materials and manuals on media literacy in Tajik. They need to be adapted for different target groups of the population.

Finally, the importance of raising public awareness of necessity for media literacy and providing access to educational resources in native tongue is emphasized.

Thus, the principal barriers are language, personnel, institutional and information problems. Their solution requires the consolidation of efforts of the state, expert community and concerned public organizations.

“The bulk of our population speaks Tajik. We have very few specialists who know the field of media literacy in Tajik and can explain it to the audience. They have to learn it, first of all. We should involve the state structure, both international and local public organizations. It is impossible to go further without the government support for media literacy development. I know perfectly well that it is a difficult job, but it must be done. We have textbooks ready, but one has to put the finishing touches on them so that people can get the manuals and use them.”

Necessary measures to promote media literacy.
In general, according to the expert, a systematic and coordinated approach involving all the parties concerned is needed to effectively promote media literacy in Tajikistan.

Firstly, it is necessary to develop a unified national concept or strategy for media literacy development. This will help to ensure comprehensive and systematic development of this sphere.

Secondly, the government sector, business and civil society should be involved as well. Their participation is important at the stage of both strategy development and its implementation.

Thirdly, it is essential to establish coordination between international organizations so that their efforts supplement each other and are not duplicated.

Fourthly, it is important to take into account the regional specifics of media literacy development. In some regions (e.g., Sughd Province) it is at a higher level.

Finally, it makes sense to use the potential of the Internet and social networks to promote media literacy, as they allow reaching a wide audience.

Such a comprehensive and coordinated approach, according to the expert, can ensure effective promotion of media literacy in Tajikistan.

“All parties involved in this issue should work as a team. For this purpose, a certain concept for media literacy development should be advanced in Tajikistan. However, the public sector should be involved to create this concept or strategy. Here again we come to the fact that we have to involve state bodies, now the third sector is dealing with this. So, we have to involve the public sector and the business sector as well. Then we can move to elaboration of a document, and according to this document we can promote the development. As long as we do not have this document, we will have chaotic development. If we compare by regions, media literacy is well developed in Sughd compared to other regions. Everyone knows about it. The resources we talked about are created by fellows from Sughd. Thank God there is the Internet, where there are no borders. It is worth noting that international organizations should also coordinate their activities so that the same works are not done twice.”

Differences in the attitudes towards interethnic conflicts
Experts identify several reasons that influence the way people treat interethnic conflicts.

Firstly, influence of propaganda plays a meaningful role. People react strongly to propagandistic messages, which hinders mutual understanding and constructive dialog.
Secondly, general level of education and literacy of people influences their attitude towards conflicts. Less educated groups are more susceptible to manipulation and incitement to hatred.
Thirdly, religiosity is an important factor, as religious views are closely linked to ideas about homeland and national identity.
Fourthly, general range of interests and knowledge of culture of other peoples mean a lot as well. People with a broader worldview tend to be more tolerant.
Finally, the ability to think critically plays an important role. Educated and literate people are able to analyze information and can resist propaganda.

"People, both in our country and in other countries, are susceptible to the influence of propaganda. Taking this into account, they always consider interethnic issues with strong emotions. If people have emotions, then mutual understanding is impossible. As for intelligence, it is quite another concept. One should use it to get reliable and objective information."

"I believe, it depends as well on the literacy level of people, their level of education and religiosity, because the concept of homeland is closely connected with religious belief, if we talk about Islam, as it is the most widespread religion.

An intelligent person always thinks critically. I would say that education is connected to the breadth of worldview of a person, i.e. how much he/she knows, and it is not necessary to travel to other countries, but at least he/she knows that besides his/her village there are dozens of other villages, there is a region, a country, other countries with their own habits and principles. This is already a broad worldview, in my opinion."

2.9. Main Conclusions

- Over the past three years, the position of television has strengthened among both young people and older generation. The Internet is in strong demand by young people, but is less popular among older people. Legacy media such as radio and print mass media are gradually giving up their positions.
- By 2023, almost all categories of digital devices and content (TV, video, Internet, gadgets, e-books) have become available to the vast majority of Tajikistan's population. Print media and books also retain their audience.
- Video content is mainly created for personal/family purposes. Civic engagement and educational projects are not yet widely used.
- Age does not have its influence on creation of family videos. At the same time, young people more often shoot content for social networks and for educational purposes.
- The population of Tajikistan maintains a steady demand for content from national Tajik-language media. One can observe a trend towards slight decline in the popularity of Russian media.
- By 2023, the audience of entertainment and sports channels decreased. Interest in the state-run TV channel Bahoriston increased.
- By 2023, the Internet audience refocused from information search to consumption of ready-made online content, primarily video and social media.
- In the capital city and GBAR, the Internet is actively used for communication. In the regions, the share of those who do not use it for communication is higher, especially in Khatlon. The primary sources of communication within the country are messengers.
- With the age, one can observe a tendency to decreased use of online communication in favor of offline communication. But in general, messengers are leading at all ages as the most convenient way to keep in touch online.
- Instagram and Telegram have seen significant growth over 2 years. YouTube is in the lead, despite the general trend of declining popularity of video hosting services. The positions of Russian social networks VKontakte and Odnoklassniki are stable, but far behind other social networks.
- The market leaders in video conferencing in Tajikistan are Google Meet and Zoom. These two platforms together cover more than half of the audience.
- WhatsApp dominates in all regions of Tajikistan. IMO is in second place, especially popular in RRS and Khatlon.
- Mobile internet access is available in all age groups, although its share is declining. The number of people having no Internet connection is growing, especially among the elderly. Fixed internet and bundled tariffs are not widespread.
- In Tajikistan as a whole, unwillingness of the audience to pay for content prevails, except for GBAR region, where the situation is the opposite.
- The greatest loyalty to paid content is observed in the middle age group (46-60 yrs.). Young people (30%) also demonstrate their willingness to pay for content. The lowest interest in paid content is among those over 60 years old.
- With the age, credibility to traditional TV increases markedly, while new digital media are losing their audience. It shows us that there is a digital generation gap.
- Over the last two years, there has been a significant refocusing of users from entertainment and social networks to messengers. In addition, messengers provide more privacy in communication. In general, there is a trend towards more private and personalized use of social media.
- The highest rates of media literacy are demonstrated by respondents aged 19-29 and 61-65.
- Population of GBAR and Khatlon shows the highest level of critical thinking and the ability to recognize inaccurate information. Residents of Sughd are less confident in assessing the news credibility. A significant proportion of respondents found it difficult to detect a fake.
- Oral communication prevails in the capital and Khatlon. In Sughd and GBAR respondents rely more on official media. These peculiarities should be taken into account when choosing communication channels.
- In all regions, people mostly determine the unreliability of information based on the lack of its official confirmation. Residents of Sughd and GBAR more often refer to refutation of news as a reason to consider it fake.
- The Internet plays a major role in spreading this news, especially in the capital and Sughd. But personal relations in Khatlon and RRS play also an important role.
- In the vast majority of cases, respondents determine the information as fake due to absence of official confirmation. Residents of Sughd and GBAR mention more often the refutation of information. This may indicate to greater attention to official information in these regions.
- Despite the slight progress, the problems of media manipulation and critical perception of information by the audience remain relevant and require further systematic work.

- With the age, preference of the audience for Russian media increases, while loyalty to local and republican Tajik media remains stable, except for decline for the latter at older ages.
- With time, people place more reliance on the opinion of their inner circle when assessing the reliability of information in the media and less on online sources. This may indicate to the growing importance of personal connections and skepticism towards the Internet as a channel for data verification.
- With the age, Internet popularity decreases, while importance of traditional media with regard to information verification increases. But in general, respondents at all ages give preference to the opinion of their inner circle.
- The practice of verifying the reliability of information by contacting media editorial offices has decreased. This may be due both to the growing trust of the audience and disappointment in the effectiveness of such appeals. In general, direct interaction between citizens and media is becoming less common.
- Compared to 2019-2021, one can see less user concern relating to online threats in 2023. This may indicate increased credibility to Internet environment, but at the same time requires further provision of information about the risks.
- Over the last 3 years, awareness of diversity of media landscape in the country has grown. At the same time, people have become more cautious about data privacy and online reputation. This indicates an increase in the media literacy level of the audience.
- Over the last 3 years, awareness of importance of information diversity has grown, while critical attitude towards media has decreased. People have become more digitally literate, but often feel fatigued due to information overload. This requires further systematic work to improve the media literacy of the audience.

3. UZBEKISTAN

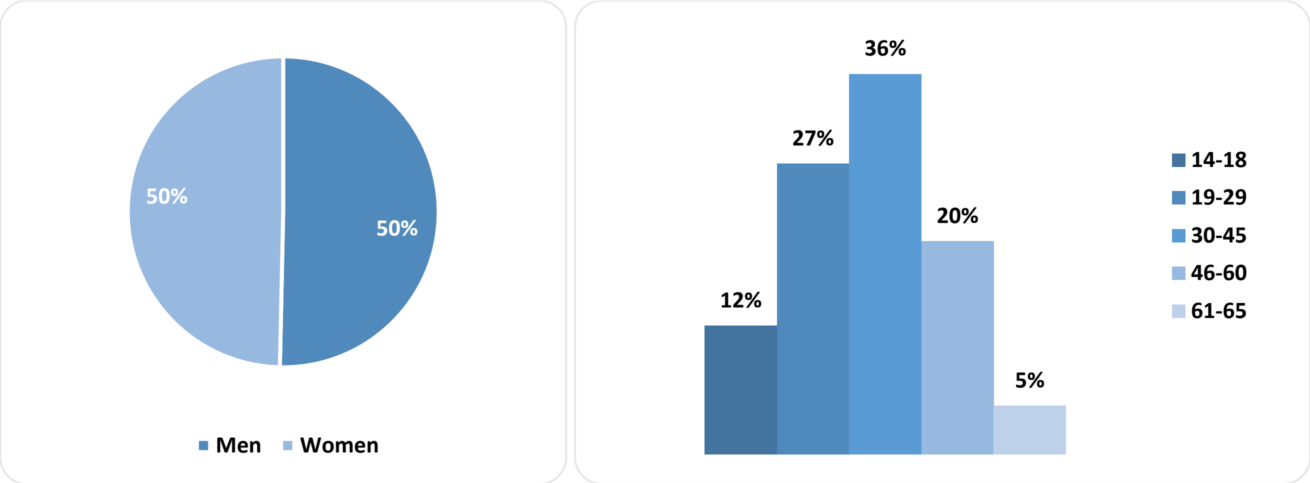
3.1. Socio-demographic Parameters of Respondents

The study involved respondents distributed into 5 age groups

- **14-18 years** – 12% (N=125)
- **19-29 years** – 27% (N=277)
- **30-45 years** – 36% (N=363)
- **46-60 years** – 20% (N=204)
- **61-65 years** – 5% (N=49)

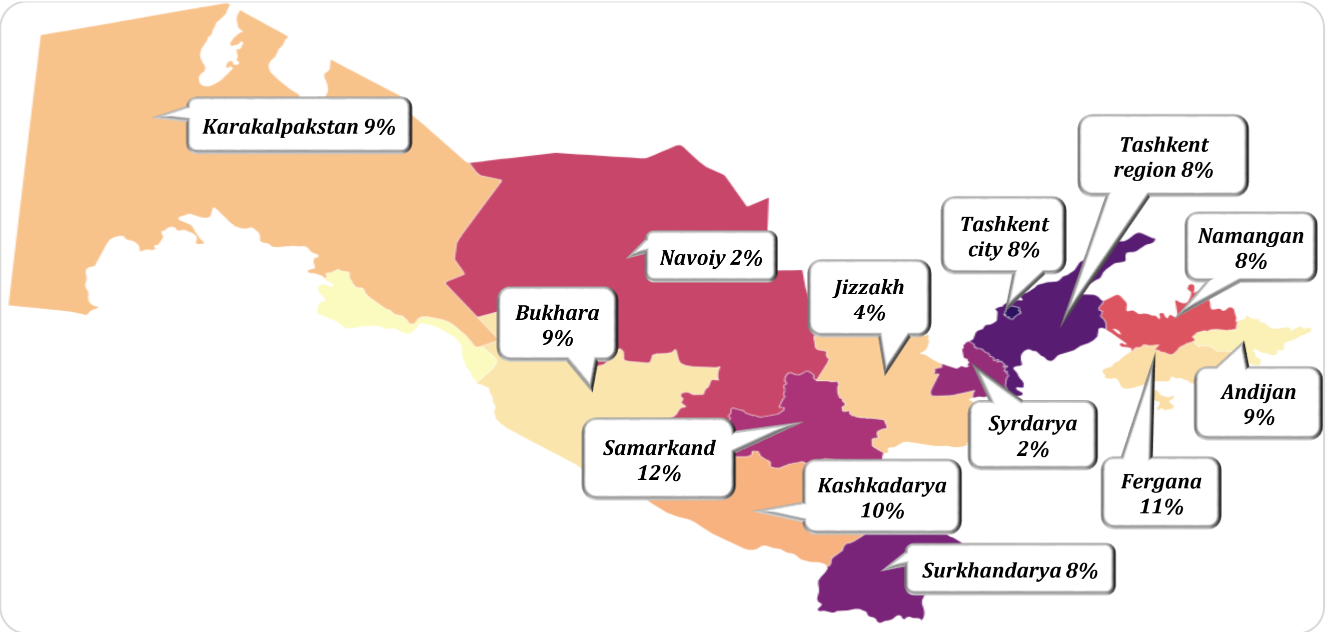
By gender: 50% (N=509) men and 50% (N=509) women.

Diagram 3.1.1. *Gender and Age of Respondents (N=1018)*



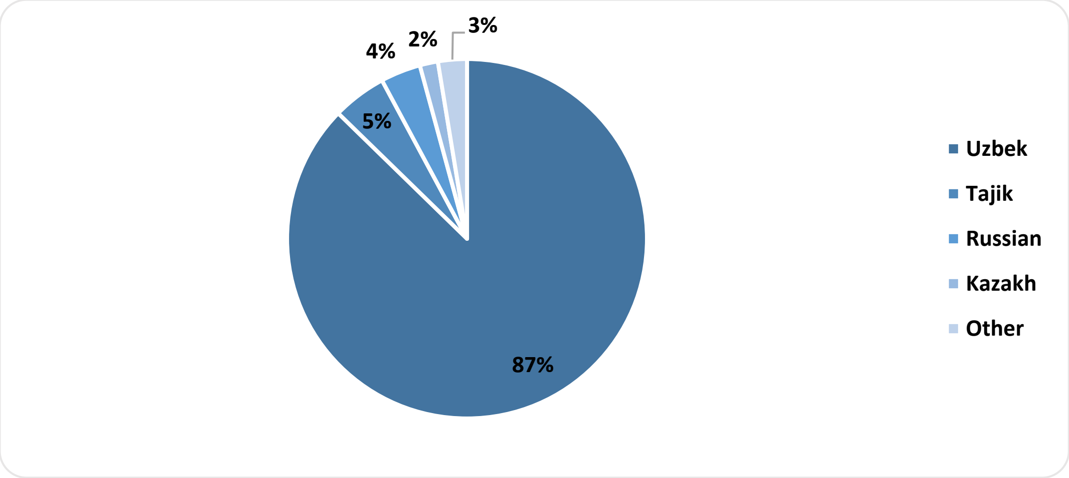
The distribution of respondents by regions within the framework of this research is as follows: Samarkand region - 12%, Fergana region - 12%, Kashkadarya region - 10%, Andijan region - 10%, Namangan region - 9%, Tashkent region - 9%, Tashkent city - 9%, Surkhandarya region - 8%, Bukhara region - 6%, Republic of Karakalpakstan - 6%, Jizzakh region - 4%, Navoiy region - 3% and Syrdarya region - 3%, respectively.

Diagram 3.1.2. *Regional Distribution of Respondents (N=1018)*



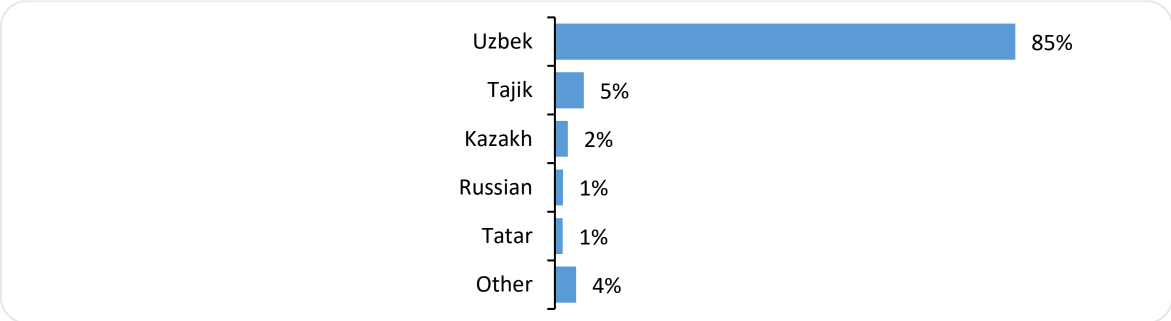
The largest share of respondents (87%) prefer to communicate in the state language, Uzbek. Next comes Tajik language, it was chosen as the language of communication by 5% of respondents. Russian language was preferred by 4% of respondents, Kazakh - 2%. Other languages account for 3% of the respondents.

Diagram 3.1.3. *Percentage of Respondents by Language Preference (N=1018)*



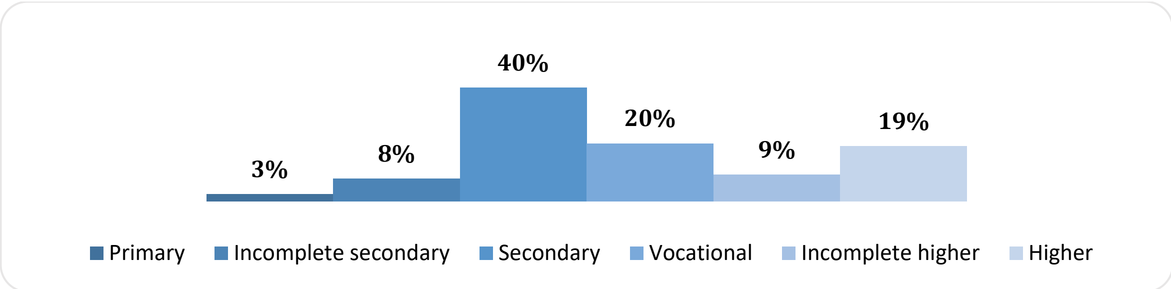
Representatives of the following ethnic groups took part in the sociological survey: Uzbeks - 85%, Tajiks - 5%, Kazakhs - 2%, Russians - 1%, Tatars - 1%. Other ethnic groups account for 4%.

Diagram 3.1.4. *National Affiliation of Respondents (N=1018)*



This survey involves respondents with different levels of education. The largest number of respondents has secondary education - 40%, then follows vocational education - 20%, higher education - 19%, incomplete higher education - 9%, incomplete secondary education - 8% and primary education - 3%.

Diagram 3.1.5. *Educational Level of Respondents (N=1018)*



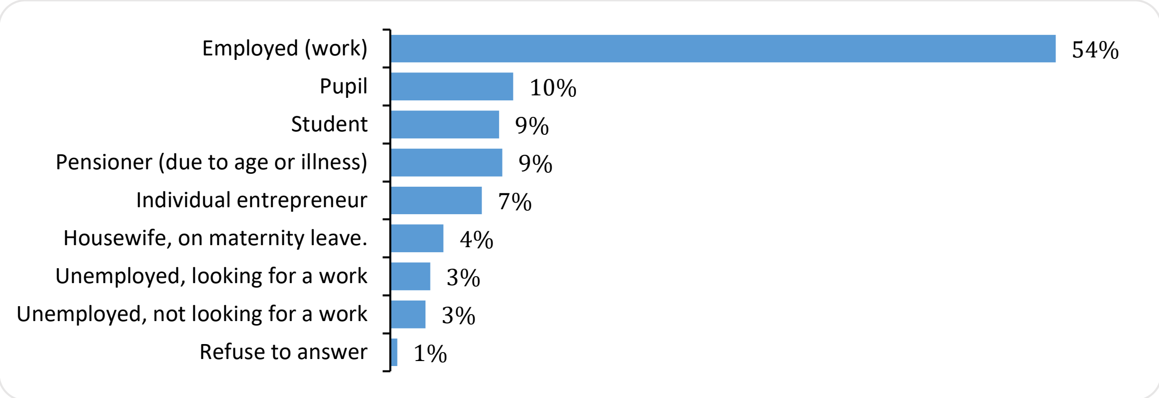
As for financial status, one-third of respondents report that they can buy basic household appliances, but purchasing a car would be difficult for them (32%). 18% of respondents can buy food and clothing, but buying household appliances would be difficult for them. Also 18% report that they have enough money for everything, except for large purchases, such as buying an apartment or a country house. 20% of respondents do not have any financial difficulties.

Table 3.1.1. Financial Condition of Respondents

Answer options	2019	2021	2023
We do not have any financial difficulties. If necessary, we can buy an apartment or a house	1%	7%	20%
We have enough money for everything (expensive clothing, car, etc.), except for expensive purchases such as an apartment or a country house	8%	11%	18%
We can by the necessary household appliances but we can`t afford to buy a car	33%	30%	32%
We have enough to buy food and clothing but it will be difficult for us to buy a TV, refrigerator or washing machine	39%	28%	18%
We have enough money to buy food but to buy clothes for us is a serious problem	7%	7%	5%
We do not always have enough money even for food	1%	3%	3%
Don`t want to answer	11%	14%	3%
Total	**100%**	**100%**	**100%**

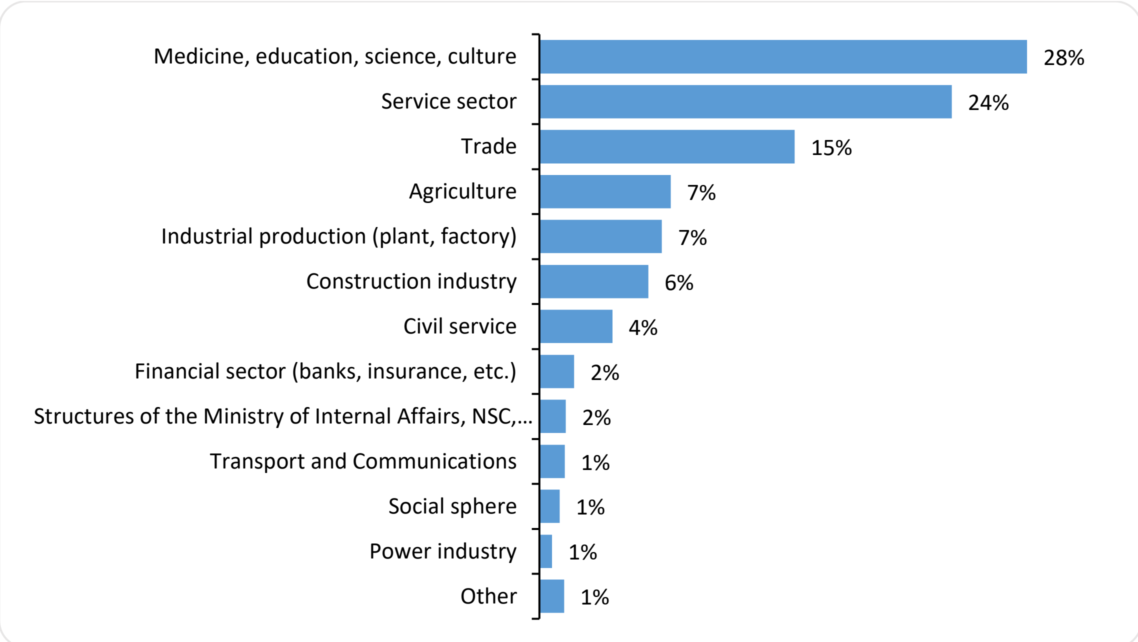
More than half of the respondents (54%) were employed. The rest were schoolchildren (10%), students (9%), pensioners (9%), etc.

Diagram 3.1.6. Social Status (N=1018)



The table below shows professional spheres of respondents.

Diagram 3.1.7. Employment Sectors of Respondents (N=624)



The share of public officers in this survey amounted to 4%.

3.2. Media Consumption: Main Sources, Preferences, Consumption Language

Sources of Information

The main goal of the first part of the survey was to identify main sources of information among the residents of Uzbekistan. The results of the survey show that 59% of respondents put TV programs first in terms of popularity, especially high figures can be seen in Andijan (73%), Fergana (71%) and Syrdarya regions (71%). The second popular source among the population is social media, which account for 47% of the total. Relatively high demand for social networks is seen in Jizzakh region (66%) and Syrdarya region (54%).

Analyzing the data for 2023, we can conclude that, as of today, television, despite some decline in figures compared to previous years, retains the leading position among the sources of information, its audience makes 59% of respondents. At the same time, there is a rapid growth of social networks popularity; they were chosen as the main information channel by 47% of respondents. This indicates that social networks are actively entering the everyday life of people and begin to compete with television for audience attention. Internet websites (40%) and personal communication (27%) continue to play a significant role. At the same time, print media and radio show a decline in popularity, being sources of information for only a small percentage of the population (5-8%). In general, there is a trend towards a gradual move from traditional media to online resources.

While conducting a comparative data analysis over a space of three years, we can highlight the following key trends in the dynamics of sources of information:

- Over the period under review, there is a steady decline of television role: if in 2019 its share was 77%, then in 2023 it has decreased to 59%. At the same time, there is brisk growth of social networks popularity as a source of news and information. If in 2019 social networks were used by only 16% of the audience, then in 2023 their share has increased to 47%.
- A certain stability is demonstrated by websites, whose audience has grown insignificantly over the three years, from 26% to 40%. There is also a slight increase in the importance of personal communication for obtaining information (from 18% to 27%).
- At the same time, the role of traditional media such as newspapers, magazines and radio continues to decline steadily. If in 2019 their total audience amounted to 16%, then by 2023 it has decreased to 13%.

Table 3.2.1. *Main Information Sources for Nationwide News*

	2019	2021	2023
From social media	16%	34%	47%
From web sites	26%	40%	40%
From other people, relatives, friends, acquaintances or colleagues	18%	16%	27%
From television broadcast	77%	66%	59%
From newspapers, magazines	10%	13%	8%
From radio broadcasting	6%	8%	5%

However, if we treat this question in terms of age, we can see that television role increases among older generations. A more detailed data analysis for 2023 shows the following preferences described below.

For 14-18-year-olds, social networks are leading (43%) alongside with television (53%). For respondents aged 19-29, social media (65%) retains the lead, although television (42%) and websites (45%) are also popular. In the middle age group 30-45, television (58%) leaves social networks behind (46%). For the 46-60 age group, television (80%) is an absolute favorite. And finally, for respondents aged over 60, TV is practically the only source of news (98%).

Considering the data in the table over the last three years, we can note the following key trends in the sources of information for different age groups. For 14-18-year-olds, there is a gradual decline in the role of social media (from 61% (N=116) in 2019 to 43% (N=125) in 2023) in favor of TV, with its share rising from 46% to 53%. A similar trend can be seen in the 19-29 age group: one can see a noticeable increase in the share of social networks (from 55% to 65% (N=298)) with a slight decline in television popularity (from 48% to 42%). In the 30-45 age group, decline in the role of social networks is less seen (from 49% to 46%), while the leading position of television remains at the level of 58-60%. Fast growth of TV popularity (from 71% to 80%) is typical for people aged 46-60, amid decrease in the share of Internet websites (48% to 28%). And in the older group aged 61-65, television becomes almost the absolute leader (98%). The role of radio grows with the age, though insignificantly. Newspapers are also losing their audience. Internet sites retain their position among young people, but weaken in older age groups. In general, we can state the strengthening of the role of television and some decline in influence of social networks. Thus, one can say that with the age, Internet sources are gradually being replaced by television.

Table 3.2.2. *Main Information Sources for Nationwide News*

Answer options	Year	14–18	19–29	30–45	46–60	61–65
Social media (in 2023 N=471)	**2023 N=471**	43%	65%	46%	34%	18%
	2021	54%	63%	45%	28%	27%
	2019 N=160	61%	55%	49%	31%	20%
Web sites (in 2023 N=408)	**2023 N=408**	39%	45%	46%	28%	17%
	2021	38%	38%	50%	39%	32%
	2019 N=255	66%	57%	56%	48%	20%
Other people, relatives, friends, acquaintances or colleagues (in 2023 N=267)	**2023 N=267**	28%	30%	27%	25%	20%
	2021	34%	20%	21%	21%	20%
	2019 N=179	36%	40%	41%	46%	46%
Television broadcast (in 2023 N=601)	**2023 N=601**	53%	42%	58%	80%	98%
	2021	13%	17%	29%	53%	58%
	2019 N=771	46%	48%	60%	71%	77%
Newspapers, magazines (in 2023 N=84)	**2023 N=84**	7%	5%	7%	12%	21%
	2021	3%	4%	5%	10%	28%
	2019 N=99	4%	6%	9%	17%	23%
Radio broadcasting	**2023 N=54**	2%	3%	5%	10%	17%
	2021	3%	2%	5%	4%	9%
	2019 N=60	4%	4%	6%	8%	4%

Use of Mass Media and Media Technologies

The survey also shows us how often respondents take pictures using different devices, and as follows from the analysis, 24% of respondents use a camera or any other device almost daily. The highest figures are seen in Syrdarya Province (36%). In Namangan Province respondents take photos slightly less often (39%), and in Tashkent the majority do not take photos at all (50%).

Making videos, as the results of the analysis showed, turned out to be less popular pastime than taking photos. Only 13% of the total number of respondents shoot video on a daily basis, of which the highest figures are in Navoiy Province (30%). More residents chose to shoot video one or more times a month (21%), especially in Namangan Province (32%). However, 47% of respondents never shoot video, with comparatively high indicators in Samarkand Province (62%).

The survey also included questions about reading books (paper version) to analyze media literacy among Uzbek citizens. As it turned out, respondents prefer to read books a couple times a week (23%) rather than daily (18%). Comparatively high figures are in Navoiy region (45%), where people read several times a week, while in Syrdarya region they prefer not to read paper books in general (52%).

E-books proved to be less popular than paper books, as only 11% of the total number of respondents read electronic versions daily. Most often it can be seen in Andijan region (18%) and the Republic of Karakalpakstan (18%). In Namangan and Samarkand regions respondents read e-books less frequently (21%), several times a week. However, the prevailing majority (63%) do not read online books at all, especially in Samarkand region (73%).

__Table 3.2.3.__ Usage Frequency of Mass Media and Media Technologies (N=1018)

	Daily or almost daily	One or more times per week	One or more times a month	Less often than once a month	Never
Watch TV	60%	22%	4%	3%	10%
Watch video records (CDs, videotapes)	5%	5%	4%	6%	79%
Listen to the radio (at home, in car, on public transport, etc.)	20%	18%	8%	5%	48%
Use computers, laptops, tablets	28%	9%	3%	2%	57%
Go online using any device	63%	8%	2%	1%	26%
Be using the cell phone/smartphone	88%	6%	1%	0%	4%
Read newspapers and magazines (paper editions)	7%	24%	11%	8%	50%
Read newspapers and magazines, web sites (digital and/or online format)	11%	14%	7%	4%	63%
Read social media	57%	14%	3%	1%	24%
Listen to audio records (mp3, mp2, IPod, including podcasts, music and books)	40%	18%	4%	3%	36%
Take photos from any device	24%	23%	9%	6%	37%
Make videos	13%	21%	13%	6%	47%
Read book (print)	18%	23%	13%	9%	38%
Read books (e-books)	11%	14%	6%	5%	63%

Analyzing the table data on the frequency of creating different types of video content, one can draw the following conclusions:

- the most regular, i.e. every day or almost every day, users make family videos (23%). This can be explained by the fact that such content reflects people's everyday life. The share of those making family videos at least once a week is 14%, and once a month is 35%.
- the second most regular is entertainment content for social networks, it is posted daily by 6% of respondents. However, the vast majority (76%) do not create such videos at all.
- educational videos and videos for thematic blogs are made with approximately the same frequency, with 6% of respondents doing it daily.
- the least regular users create videos on socially important topics and to protect their rights, 85-93% do not do this at all.

__Table 3.2.4.__ Content Filmed by Respondents (N=544)

	* With varying frequency	Daily or almost daily	One or more times per week	One or more times a month	Less often than once a month	Never
Make family videos (kids, holidays, family events, etc.)	**23%**	14%	35%	30%	12%	**8%**
Make entertaining videos for Tik-Tok, Instagram	**6%**	7%	9%	5%	2%	**76%**
Make videos about social problems of a city/village aiming herewith to solve the issue	**4%**	3%	4%	4%	4%	**85%**
Make videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	**2%**	1%	1%	2%	2%	**93%**
Film educational videos, advices, coaching	**6%**	6%	9%	5%	4%	**75%**
Make videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	**6%**	4%	8%	5%	5%	**76%**

Analyzing data on the types of video content created by users in terms of age groups, the following trends can be identified:
- the most popular format for all ages is family video, its share is 22-25% and does not change with the age. This is explained by the universality of this topic.
- entertainment videos for social networks are most in demand among young people aged 14-29 (8%), which is associated with active use of Tik-Tok and Instagram. The share of such content drops sharply by the age of 30.
- educational videos and thematic blogs are more popular in the younger age groups (14-29 years) (6-9%), and then their share decreases.
- in the middle and older age groups of 30-60 years old, interest in videos on socially important topics is growing (3-5%), which indicates that this audience is more aware of social issues.

Table 3.2.5. *Content Filmed by Respondents (N=544)*

	14-18	19-29	30-45	46-60	61-65
Make family videos (kids, holidays, family events, etc.)	22%	23%	23%	22%	25%
Make entertaining videos for Tik-Tok, Instagram	8%	8%	4%	1%	4%
Make videos about social problems of a city/village aiming herewith to solve the issue	2%	3%	4%	5%	0%
Make videos about violation of rights and laws for protection purposes (lodging complaints with government agencies)	1%	2%	1%	3%	0%
Film educational videos, advices, coaching	6%	7%	5%	6%	7%
Make videos for thematic blogs / Featured videos: food, travelling, beauty, etc.	9%	7%	4%	4%	7%

Consumption Language

Having analyzed the data presented in the table on the use of various sources of information in Uzbek and Russian languages, **the following conclusions can be drawn**:
- in all categories under review (television, radio, print media, Internet websites, social networks) one can see significant predominance of content consumption in Uzbek language. The share of those who use only Uzbek varies from 59% to 70% depending on the type of source.
- the highest share of "Uzbek-only" content is observed in print media - 70%, the lowest - in Internet websites - 59%.
- consumption of content in both languages accounts for 14-24%, depending on the source. The predominance of Russian-language content is noted by only 3-5% of the audience.

Table 3.2.6. *Language Preferences for Consuming Information Among Respondents*

	Watch TV, n=914	Listen to the radio, n=520	Read newspapers / magazines (print and online), n=629	Browse the Internet, n=779	Use social media, n=772
Only in Uzbek	60%	68%	70%	59%	62%
More in Uzbek than in Russian	7%	5%	5%	6%	5%
In Uzbek and Russian equally	24%	18%	14%	23%	23%
More in Russian than in Uzbek	4%	4%	4%	4%	4%
Only in Russian	3%	3%	4%	5%	4%
Other language	1%	1%	2%	1%	1%
Not sure	1%	2%	2%	1%	1%

Analyzing the data in the table, we can identify the following trends in language preferences between men and women when consuming information from different sources:
In general, both male and female audiences are characterized by the predominance of content in the Uzbek language. At the same time, the share of the Uzbek language is slightly higher among women. Thus, in 2021, 80% of women watched TV only in Uzbek, while men account for 61%. A similar situation can be seen in other categories of information sources.
In the space of 2 years, the share of the Uzbek language among male audience has slightly decreased with respect to watching television (from 61% to 55%), using the Internet (from 88% to 55%) and social networks (from 76% to 59%). At the same time, among women one can see an increase in the share of the Uzbek language with respect to radio listening (from 59% to 73%).

Consumption of content only in Russian language is low both among men and women. But in the female audience this indicator is even lower (1-4% vs. 3-12% for men).

Table 3.2.7. *Language Preferences for Consuming Information Among Men and Women*

	Consumption Language	Men		Women	
		2021	2023	2021	2023
Watch TV	**Only in Uzbek**	**61%**	**55%**	**80%**	**65%**
	Only in Russian	3%	4%	2%	2%
Listen to the radio	**Only in Uzbek**	**64%**	**64%**	**59%**	**73%**
	Only in Russian	3%	2%	1%	4%
Read newspapers/magazines (print and online)	**Only in Uzbek**	**59%**	**67%**	**80%**	**73%**
	Only in Russian	3%	3%	4%	4%
Browse the Internet	**Only in Uzbek**	**88%**	**55%**	**97%**	**63%**
	Only in Russian	12%	6%	8%	5%
Use social media	**Only in Uzbek**	**76%**	**59%**	**82%**	**66%**
	Only in Russian	10%	4%	6%	4%

Preferences in News Sources and Analytics by Country/Region

Conducting a comparative analysis of the data for 2021 and 2023, several important trends in the choice of information sources by the audience can be identified.

Firstly, there is a clear tendency to strengthen the role of the republican Uzbek media. Their share has grown almost across all channels: radio from 53% to 58%, print media from 54% to 59%, Internet from 44% to 57%, and TV from 69% to 70%. Thus, the national republican media of Uzbekistan are strengthening their leading positions.

Secondly, influence of Russian media is decreasing; their share fell from 9% to 7% on radio, from 7% to 5% in the press, from 10% to 8% on TV. Slight increase is seen only on the Internet, from 11% to 13%. Nevertheless, on the whole, the role of Russian media is weakening.

Thirdly, the audience's interest in foreign sources of information is growing. Their share has increased across all channels - on radio from 1% to 4%, in print from 1% to 4%, on the Internet from 3% to 6%, and on TV from 1% to 2%.

Finally, the number of those who do not use traditional media, radio and newspapers, at all is increasing. This indicates a growing importance of the Internet.

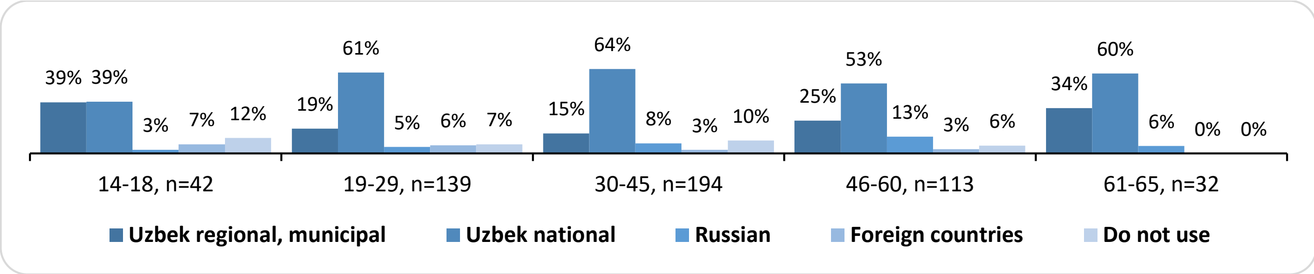
Table 3.2.8. *Preferred Sources of News and Analytical Programs in Different Media*

Answer options	Radio		Newspapers/magazines		Websites		TV	
	2021	2023	2021	2023	2021	2023	2021	2023
Uzbek regional, municipal	32%	21%	34%	22%	14%	13%	19%	17%
Uzbek national	53%	58%	54%	59%	44%	57%	69%	70%
Russian	9%	7%	7%	5%	11%	13%	10%	8%
Foreign countries	1%	4%	1%	4%	3%	6%	1%	2%
Do not use	0%	8%	0%	9%	12%	5%	0%	3%

Analyzing the preferences of information sources in different age groups, the following trends can be identified:

Republican Uzbek radio stations are leading in all ages, their share varies from 39% in the youngest group aged 14-18 to 64% in the 30-to-45 age group. The only exception is the youngest audience, where influence of regional and national media is the same (39% each). The role of foreign radio sources is more noticeable among young people aged 14-29 (6-7%) compared to older ages. The interest in Russian radio stations increases with the age, from 3% in the group aged 14-18 to 13% in the 46-60 age group. The share of those who do not use radio is higher among young respondents (14-18 yrs.) - 12% and 10% in the 30-45 age group.

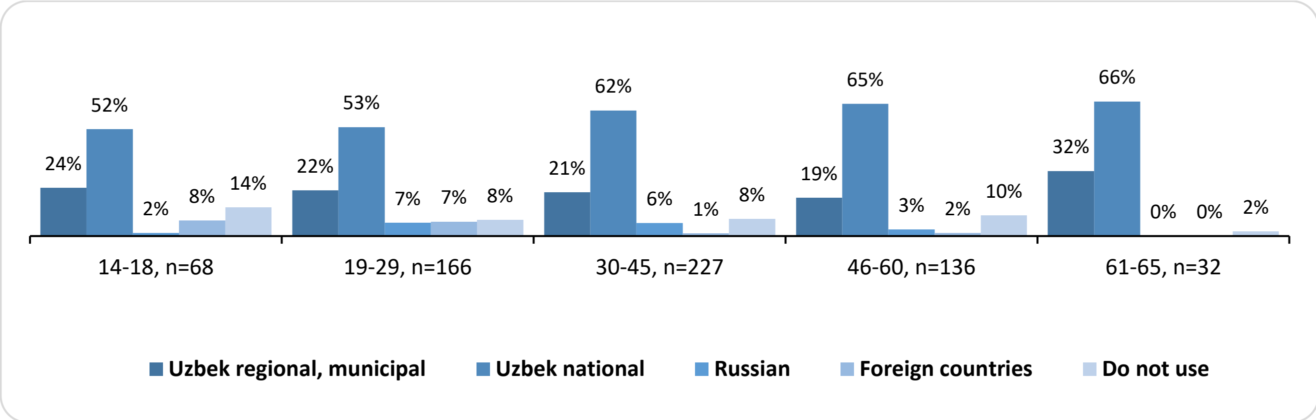
Diagram 3.2.1. Preferences by Country/Region When Listening to News and Analytical Programs on the Radio



Analyzing the preferred information sources with respect to newspapers and magazines in different age groups, it can be noted that national Uzbek sources are leading in all ages, their share varies from 52% in the youngest group (14-18 yrs.) to 66% in the older group (61-65yrs.). Role of foreign sources is more noticeable in the group aged 14-29 (7-8%) compared to older ages.

Interest in Russian mass media is most seen in the 19-29 age group (7%), while in other ages their share is small (0-6%). The share of those who do not use any of the abovementioned sources is higher in the young group (14-18yrs.) - 14% and 10% in the 30-45 age group.

Diagram 3.2.2. Preferences by Country/Region When Reading News and Analytical Articles in Newspapers and Magazines



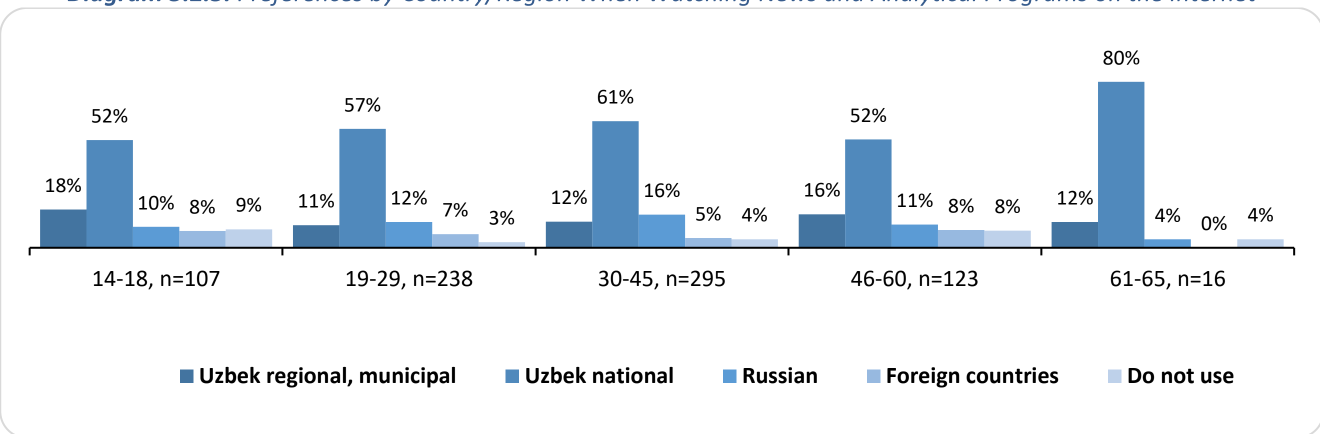
Analyzing the presented data by age groups, we can identify several key trends in the choice of information sources on web sites.

Firstly, online national Uzbek media are leading in all ages, their share varies from 52% among young people to 80% in the older group (61-65yrs.). This indicates their leading role in the country's media landscape.

Secondly, it is interesting to note the high popularity of foreign sources among the audience aged 14-29 (7-8%), which indicates that the younger generation is oriented towards the global information field.

Thirdly, there is a tendency towards decline in interest in traditional media in younger age groups, their share among non-users rises to 9% among 14-18-year-olds.

Diagram 3.2.3. Preferences by Country/Region When Watching News and Analytical Programs on the Internet

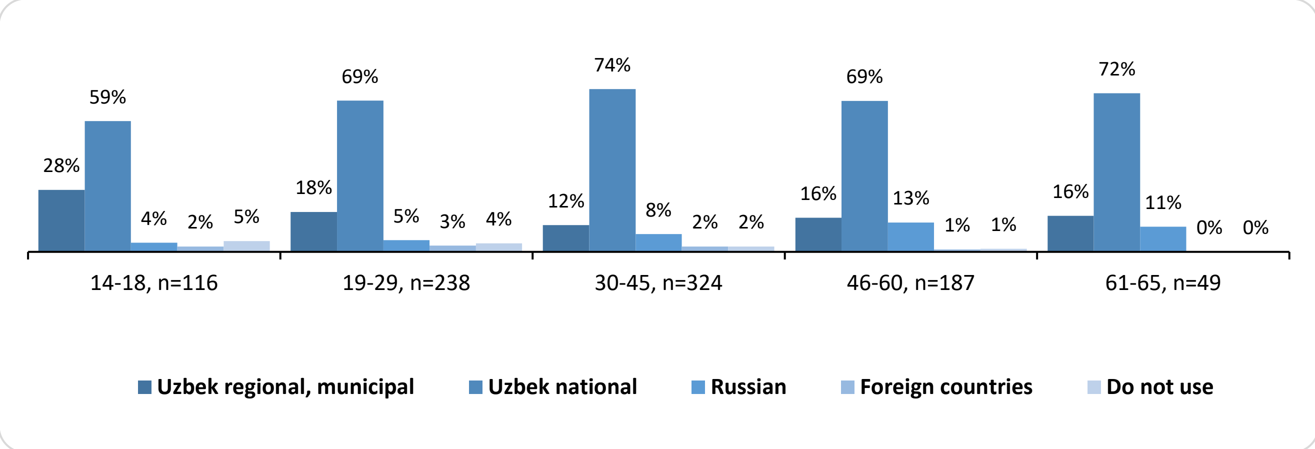


Regarding TV sources, Uzbek national TV channels are leading in all ages, with its share ranging from 59% among respondents aged 14-18 to 74% among 30-45-year-olds.

It is interesting to note the relatively high interest in foreign TV among 14-29-year-olds (2-3%), which indicates the orientation of the younger generation to the global information field.

However, one can see a clear tendency of the reduced consumption of traditional media among respondents aged 14-18, the share of non-users reaches 5%.

Diagram 3.2.4. *Preferences by Country/Region When Watching News and Analytical Programs on TV*



3.3. TV Broadcast

Based on the data presented in table with regard to the share of audience of different Uzbek TV channels, the following analysis can be made.

The leading position is held by Zor TV channel, reaching more than half of the audience (54%). This indicates its leading role in the national television market. The second place is shared by Milliy TV and Sevimli TV with the same share of 42%. They can be considered major players in the country's media landscape. Next are TV channels with medium audience coverage: Sport (11%), UzReport (9%), YOSHLAR (9%). They occupy a niche of more narrowly specialized resources. The least popular channels are My5, FTV and Aqlvoy (2-3% of the audience). They can be classified as small entertainment projects. In general, one can see high concentration of the audience around a few large players of national television and fragmentation of the rest of the market between small narrowly focused channels.

Table 3.3.1. *Uzbek TV channels Watched by Respondents in the Last Week* ***(****N=914)*

	%
Milliy TV	42%
Zor TV	54%
Mening Yurtim	28%
Sevimli TV	42%
YOSHLAR	9%
O'zbekiston	10%
Kinoteatr	7%
Mahalla	3%
UzReport	9%
Sport	11%
My5	3%
FTV	2%
Aqlvoy	2%
Other	9%
Did not watch Uzbek TV channels in the last week	6%

The overwhelming majority of respondents (76%) stated that they have not watched Russian channels in the last 7 days. This indicates the extremely low popularity of Russian television in Uzbekistan. The most popular Russian TV channel is Russia-1 (10% of the audience). Other federal TV channels have coverage from 2% to 7%. Entertainment channels STS and Pyatnitsa are practically not watched (0-2%). In general, there is a very low involvement of the Uzbek audience in watching Russian TV. Only a couple of federal channels have a small coverage. Thus, Russian TV is not popular in Uzbekistan and is inferior to local national channels.

Table 3.3.2*. Russian TV Channels Watched by Respondents in the Last Week (N=914)*

	%
NTV	7%
TNT	2%
Russia-1	10%
TV-3	2%
Match TV	3%
Channel One	5%
Russia 24	7%
STS	0%
Zvezda	2%
Pyatnitsa	0%
Other	3%
Did not watch Russian TV channels in the last week	76%
Not sure	3%

- Most of respondents (88%) did not watch foreign TV channels in the past week. This points to the fact that popularity of foreign TV is extremely low in our country.

- BBC, Disney and Discovery are the most popular foreign TV channels, though their percentage is low (3% of the audience).
- Such influential foreign channels as CNN, Euronews and Al Jazeera are hardly ever watched (0-1%).
- Entertainment and sport foreign channels are also not popular (1-2%).

Table 3.3.3. *International TV Channels Watched by Respondents in the Last Week (N=914)*

	%
BBC	3%
Nickelodeon	1%
Disney	3%
Euro News	3%
Al Jazeera	0%
Discovery	3%
National Geographic	2%
CNN	0%
ESPN	0%
India TV	1%
GEM TV	0%
Other	1%
Did not watch foreign TV channels in the last week	88%
Not sure	2%

The survey also includes information on media preferences and takes into account respondents' requests. In this survey respondents were also asked about media of other countries, namely which of them they want to reduce and which to add in Uzbekistan. As a result, the data indicates a positive attitude toward adding Central Asian media in Uzbekistan, with 49% voting in favor. The highest figures are seen in Tashkent region (59%). However, 26% of respondents want to reduce Central Asian broadcasting, especially in Samarkand region (39%). 24% find it difficult to answer. As for Uzbek media rating, the results are negative, as 54% of the total number of respondents want to reduce Uzbek broadcasting, and only 16% agree to add it. 30% of respondents do not have definite answer. The highest share of those who vote against adding Uzbek media is in Navoiy region (80%), while the highest share of those are against the reduction is seen in Surkhandarya region (30%).

As follows from the analysis, Russian media are in high demand among Uzbek residents, as 58% of respondents from all regions of Uzbekistan answered that they would like to add Russian broadcasting. Comparatively high figures on this issue are in Navoiy region (70%). At the same time, 26% would still like to reduce this broadcasting, with the highest proportion of respondents in Samarkand region (42%).

Most of respondents (58%) would like to reduce Persian media, and only 11% vote in favor of adding them. In Tashkent, 21% of respondents, what is comparatively high compared to other regions, would like to see Persian TV broadcasting, while in Navoiy Oblast 90% would like to reduce them.

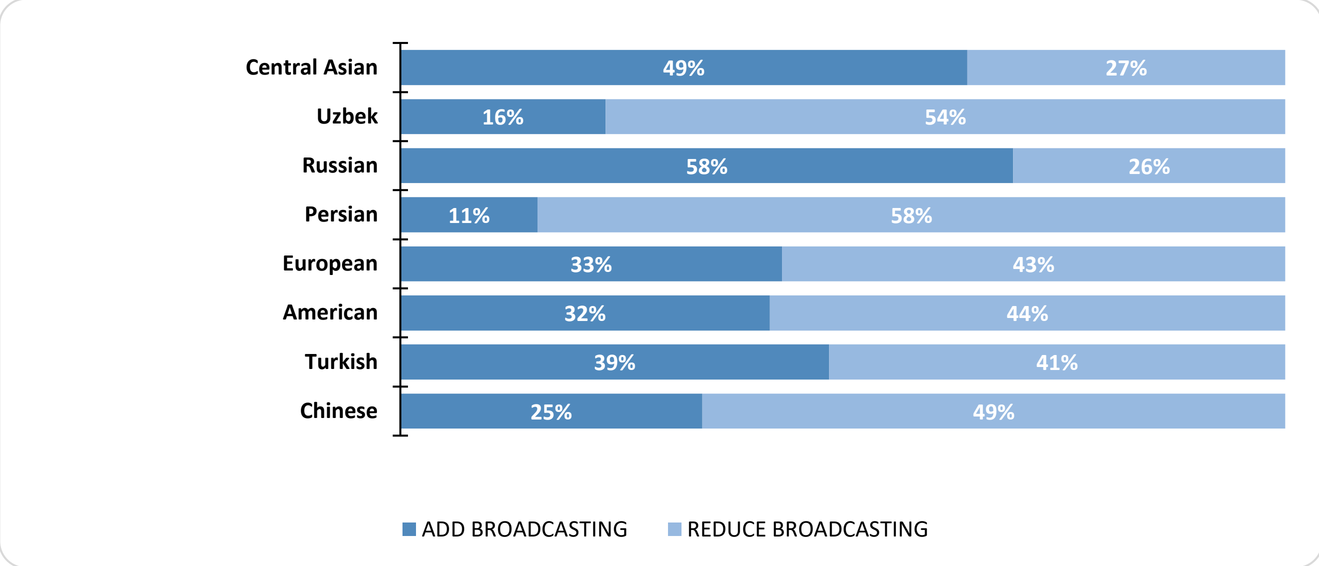
European media are not so popular among the residents of Uzbekistan; 33% of the total number of respondents said they would not mind adding them. Navoiy Oblast has the highest proportion of those who vote in favor, while 43% still want to reduce European media, for example, the share of those in Fergana region is 52%.

In terms of gender, most men vote in favor of adding foreign European media (37%), while women say they want to reduce (46%).

American media are also in demand, with 32% of respondents want to add them, especially among residents of Tashkent city (46%). However, the majority (44%) would still like to reduce these media in Uzbekistan, especially in Bukhara and Surkhandarya regions (58%).

Considering this issue by age, we can say that the youngest group of respondents aged 14-18 vote most in favor of adding American media (56%), while the highest share of those who want to reduce their broadcasting is seen in the group aged 46-60 (54%).

__Diagram 3.3.1.__ Media Preferences by Countries the Respondents Would Like to Add/Reduce (N=1018)



Analyzing the data for 2023, we can note the following **television viewing preferences of the audience**:
- news on Uzbek channels are leading (68%), which indicates the priority of national news for viewers.
- sports broadcasts (40%), entertainment programs (27%), and morning programs (29%) have high rates. This demonstrates an interest in entertaining and positive content.
- share of educational (26%), children's (23%), religious (17%) programs is noticeable. This indicates demand for useful and educating content.
- analytical programs (18%), movies and TV series (51%) are of less interest with the audience.

Analysis of the dynamics of TV content preferences over the last three years allows us to identify several key trends:
Firstly, one can see an increase in the audience's interest in news on Uzbek TV channels, from 62% in 2019 to 68% in 2023. This suggests increased attention to the national information field.
Secondly, popularity of sports broadcasts is growing, from 25% to 40%. The percentage of those who watch entertainment and comedy shows is increasing as well, from 17% to 27%. Thus, we see an increased interest in feel-good content.
Thirdly, demand for educational and children's programs is increasing. If in 2019 only 8-10% of the audience watched them, then by 2023 the share has increased to 23-26%.
In contrast, the share of feature films and TV series in the structure of TV viewing is decreasing, from 63% to 51%.

__Table 3.3.4.__ Respondents' Preferences, What They Usually Watch on TV

	2019	2021	2023
News on Uzbek central TV channels	62%	60%	68%
News on Russian TV channels	-	13%	17%
News on international TV channels	35%	15%	16%
Morning shows	12%	27%	29%
Entertainment (comedy) shows, telegames, completion shows	17%	18%	27%
Sportscast, broadcasting	25%	32%	40%
TV series and feature films	63%	48%	51%
Analytical programs, talk shows	10%	13%	18%
Educational shows	10%	18%	26%
Children's programs, animated cartoons	8%	19%	23%
Cooking shows	16%	8%	24%
Science TV shows, documentaries	16%	12%	15%
Music shows, concerts	31%	36%	41%
Religious programs	12%	6%	17%
Reality shows	6%	7%	15%

3.4. Internet

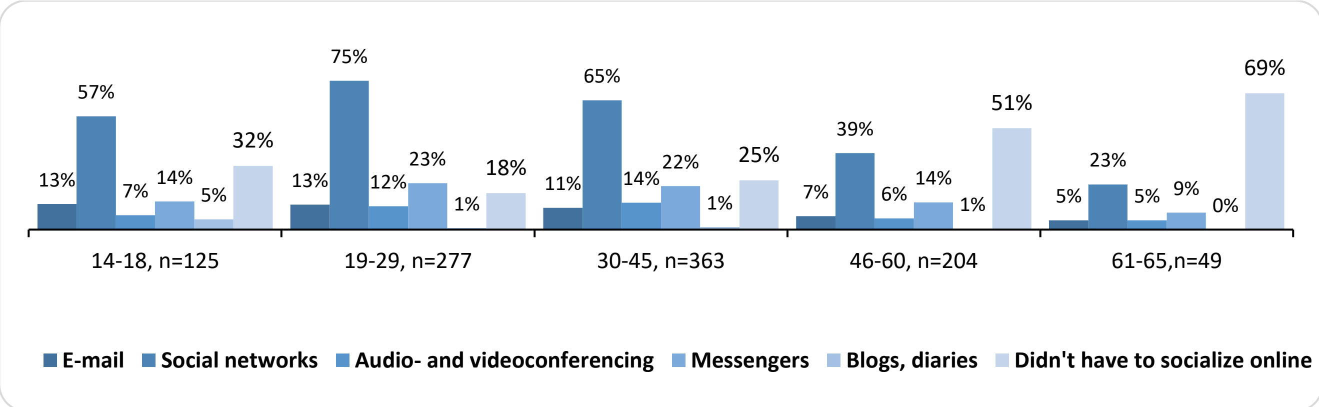
This section describes the activity of respondents on the Internet and social networks. As it was found out, over the last month 94% of respondents watched TV programs online, especially in Jizzakh region (100%) and the Republic of Karakalpakstan (100%). 66% read news on the Internet, most of all respondents from Navoiy and Andijan regions (82%). The third place is occupied by communication in social networks (47%), the highest figures are seen in Fergana region (60%).

Table 3.4.1. *Online Activities of Respondents in the Last Month (N=748)*

	2023
Reading online news	66%
Social networking	47%
Watching TV series/ movies	39%
Using search engines (Yandex, Google, etc.)	29%
Downloading, music listening, watching video	32%
Posting personal photos and videos	13%
Reading books online	28%
Job search online	10%
Using cloud services (Yandex Disc, Google Disc, etc.)	10%
Purchasing goods, services, tickets online	12%
Personal blogging	3%
Applying for government services online	10%
Managing bank account online	18%
Personal financial management (including but not limited to credit facilities, mortgage loans, investments)	12%
Payment for goods/services with e-money (Yandex.Money, QIWI Wallet, Web Money, etc.)	11%
Studying online	20%
Watching TV shows	94%
Online work	9%
E-participation in civic engagement (create/sign online petitions, participate in discussions about laws before they are passed)	5%
Visiting thematic web portals (hobby, business, parenting)	5%

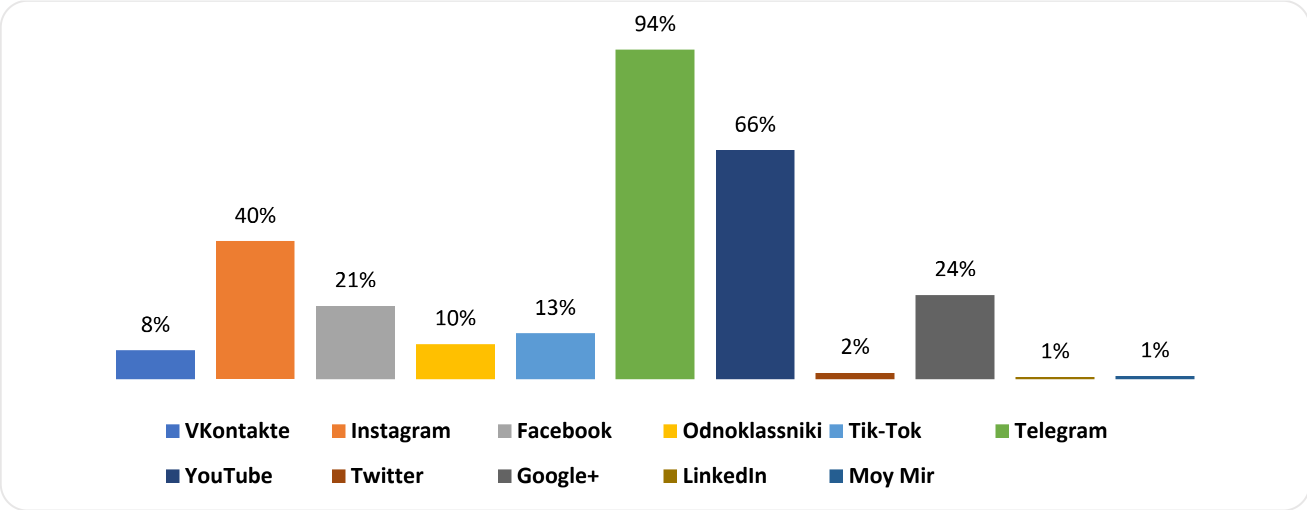
59% of the total number of respondents use social networks as the main way of online communication, comparatively high figures are in Namangan region (78%). 31% of respondents state that they do not communicate online in general. 19% use messengers, especially in Namangan region (31%). Blogs and diaries are used the least (1%). In terms of age categories, almost all respondents prefer social networks, especially the group aged 19-29 (75%). The older generation (61-65yrs.) are least likely to communicate via social networks (69%). 23% of respondents aged 19-29 communicate via messenger (23%).

Diagram 3.4.1. *Ways of Online Communication Used by Respondents in the Last Month (N=1018)*



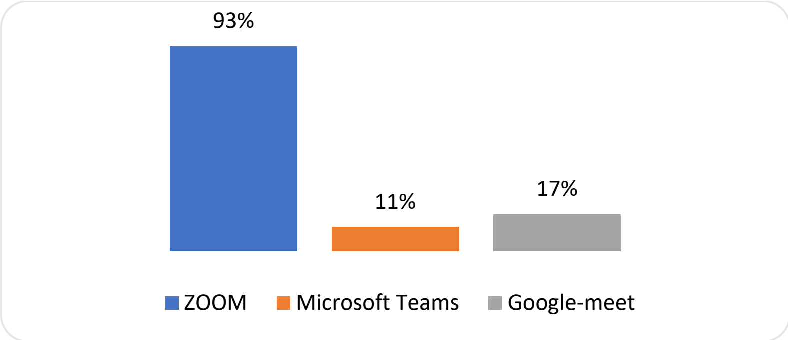
94% of the total number of respondents choose Telegram as the main platform for online communication, with the highest shares of respondents from Jizzakh, Navoiy and Surkhandarya regions (100%). The second place is occupied by YouTube (66%), especially in Andijan and Surkhandarya regions (82%). Instagram holds the third place with 40% of votes, especially in Tashkent region (53%).

Diagram 3.4.2. Use of Different Social Networks and Apps for Online Communication (N=595)



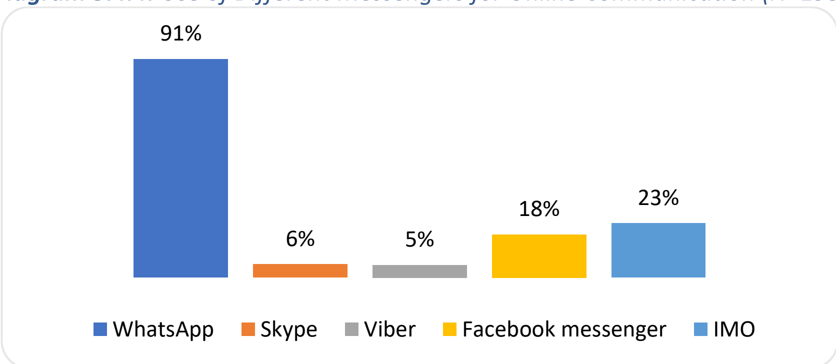
We have also considered services used for audio- and videoconferencing, such as ZOOM, Microsoft Teams and Google-meet. As the analysis showed, 92% use ZOOM; relatively high rates of using this server are seen in Andijan, Bukhara, Jizzakh and other oblasts (100%). 17% use Google-meet, especially in Syrdarya region audio- and videoconferencing on (50%). Microsoft Teams is used by only 11% of respondents, with the highest share of respondents from Navoiy Province (48%).

Diagram 3.4.3. Use of Different Audio- and Videoconference Services (N=100)



Messengers were also considered more detailed, as they were among the top three most demanded and used servers for online communication. 91% of respondents place WhatsApp ahead of others, especially in Bukhara, Namangan, Navoiy and other regions (100%). 23% use IMO more often, with the highest number of votes in Syrdarya region (53%). The third place is occupied by Facebook Messenger (18%), the highest figures are seen in Jizzakh oblast (66%). The least used are Skype and Viber (5%).

Diagram 3.4.4. Use of Different Messengers for Online Communication (N=193)



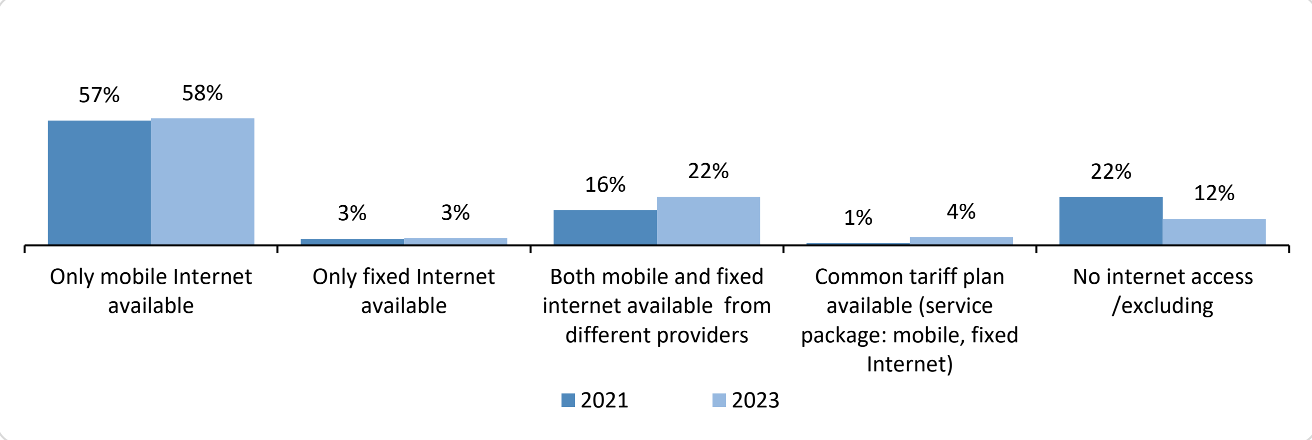
58% of the respondents state that they have only mobile Internet. Respondents from the Republic of Karakalpakstan have the highest rate (73%). Mobile and fixed Internet from different providers (22%) occupy the second place in terms of

popularity, especially in Navoiy region (60%). 12% of respondents generally do not have any access to the Internet. Less popular types of internet connection are a common tariff plan (4%) and only fixed internet (3%).
The analysis of changes in the types of internet connections among respondents for the two periods of time, 2021 and 2023, demonstrates interesting trends in internet use in Uzbekistan.

Based on the survey results, we see the following:
- share of mobile internet users remained more or less stable at 57% in 2021 and slightly increased to 58% in 2023.
- share of users with fixed internet also remained small and unchanged at 3% in both 2021 and 2023.
- interesting changes are seen in the group of users with both types of internet connection from different providers: their share increased from 16% in 2021 to 22% in 2023. This may indicate a growing diversity of connections and services provided.
- share of users with a common tariff plan (service package: mobile, fixed internet) also increased from 1% in 2021 to 4% in 2023. This growth may reflect the increased popularity of bundled offering from providers.
- significant decline is observed in the proportion of those without any internet access (excluding cases where absence is due to technical reasons), from 22% in 2021 to 12% in 2023. This may indicate an increase of available internet-based technologies in the country.

The abovementioned changes in the types of Internet connections may reflect the increasing availability of mobile Internet technologies, expansion of alternative connectivity options and growing influence of bundled tariff plans.

Diagram 3.4.5. *Distribution of Internet Users with Different Connection Methods (N=1018)*



Analysis of the types of Internet connections in different age groups from 2021 to 2023 revealed the following changes: The share of users with only mobile internet decreased: in the 14-18 year old group from 64% to 61%, in the 19-29 age group from 62% to 64%, in the 30-45 age group from 63% to 60%, in the group aged 46-60 from 44% to 49%, and in the 61-to-65 age group from 21% to 39%. The proportion of users with only fixed internet remained low and has not actually changed. The share of users using both mobile and fixed Internet from different providers increased: in the group of 14-18 years old from 18% to 21%, in the group aged 19-29 from 19% to 24%, in the 30-45 age group from 14% to 26%, in the group aged 46-60 from 16% to 15%, and in the 61-65 age group from 7% to 14%. The proportion of users using a common tariff plan also increased in all groups. The share of those without Internet access (excluding cases where the absence is due to technical reasons) decreased: in the group aged 14-18 from 14% to 9%, in the 19-29 age group from 14% to 5%, in the 30-45 age group from 19% to 7%, in the 46-60 age group from 36% to 25%, and in the group aged 61-65 from 67% to 44%. These changes may show the growth of available Internet technologies and diversity of connections in all age groups.

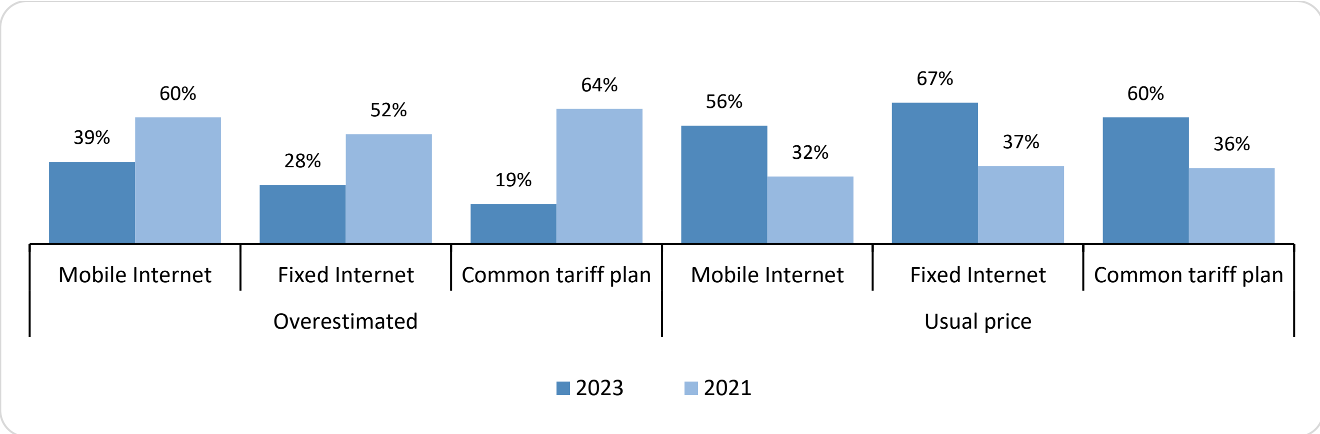
Table 3.4.2. *Distribution of Internet Users with Different Connection Methods by Age (N=1018)*

	Year	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
Only mobile internet available	**2023**	61%	64%	60%	49%	39%
	2021	64%	62%	63%	44%	21%
Only fixed internet available	**2023**	4%	1%	2%	7%	3%
	2021	2%	3%	3%	3%	3%
Both mobile and fixed internet available from different providers	**2023**	21%	24%	26%	15%	14%
	2021	18%	19%	14%	16%	7%
Common tariff plan available	**2023**	5%	5%	3%	4%	0%

	2021	1%	1%	1%	0%	0%
No internet access /excluding/	**2023**	9%	5%	7%	25%	44%
	2021	14%	14%	19%	36%	67%

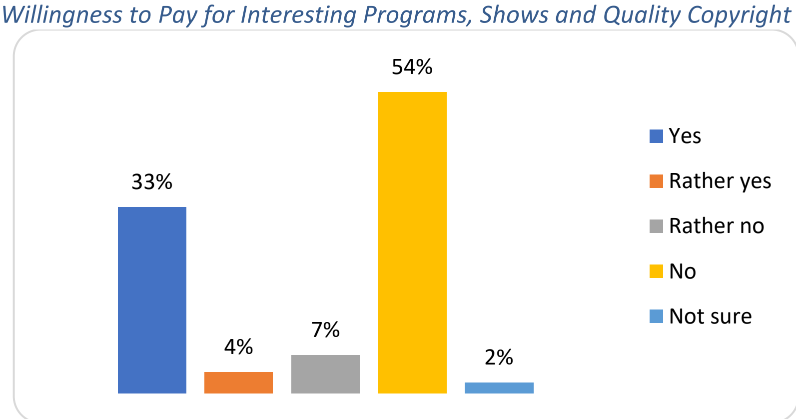
In 2023, the share of users paying overestimated price for mobile internet decreased significantly from 60% (2021) to 39%. The share of users paying overestimated price for fixed internet decreased as well, from 52% to 28%.
At the same time, the proportion of users paying normal price for mobile internet increased from 32% (2021) to 56%. The share of those paying normal price for fixed internet also increased from 37% to 67%.
Costs for a common tariff plan has remained relatively stable, although there is a slight decrease in 2023 compared to 2021. These changes may indicate improved availability and competition in the internet services market, which has led to reduced prices for internet.

Diagram 3.4.6. *Opinions of Respondents on Internet Services Costs*



37% of respondents expressed their willingness to pay for access to interesting programs, shows and intellectual copyright products. On the other hand, 61% of users expressed another opinions: 7% were rather not willing to pay, and 54% explicitly stated that they were not willing. This indicates a mixed interest in paid author`s content. At the same time, a significant number of respondents express hesitation or refusal to pay for access to such content. This may be due to availability of free alternatives, assessment of the value of the content and their own financial capabilities.

Diagram 3.4.7. *Willingness to Pay for Interesting Programs, Shows and Quality Copyright Products (N=897)*



Next, we consider the online use of and access to certain types of content. The main sections of the survey are divided into 3 parts: determination of online platforms for watching or listening to media content, quantification of respondents who already pay for these online platforms and respondents who are willing to pay for the content they are interested in.
Having analyzed the data one can see that the majority (54%) of respondents do not watch movies and TV series for which they have to pay, especially in Fergana region (71%), while 46% use paid services to watch TV series and movies, especially in Jizzakh region (77%). Considering the same respondents, 72% of them do not pay and are not going to make paid subscriptions to watch movies, while 28% of respondents already pay or are ready to pay for their viewing. The highest figures of those using paid versions are seen among residents of Kashkadarya Province (71%), while respondents from Andijan Province (94%) are least willing to pay.

When listening to music, 64% of the total number of respondents use online music streaming services, especially in Jizzakh region (89%), while 36% of respondents prefer not to use these platforms, especially in Fergana and Andijan regions (53%). Of these individuals, 31% of respondents already have paid subscriptions for music streaming apps, especially in Kashkadarya Province (67%). Majority (69%) do not pay for such streaming services, with comparatively high figures on this issue in Navoiy Province (93%). It was also noticed that only 17% are ready to pay for music content, and these are mostly residents of Bukhara region (34%). 83% are not ready to spend money for listening to music.

Table 3.4.3. *Online Content Consumption and Payment*

	Online usage:	Already paying for access:	Ready to pay for access:
Movies/TV series	46%	28%	18%
Listening to music	64%	31%	17%
Games	24%	32%	13%
Reading books, audio books	39%	44%	37%
Listening to podcasts	10%	25%	24%
News	74%	33%	26%
Analytics	30%	33%	27%
Educational programs	46%	45%	42%

Online gaming platforms are not in high demand, as only 24% say that they play online, especially in Fergana Province (84%). The majority of respondents (76%) do not use these platforms; respondents from Jizzakh oblast (49%) are the least likely to play. Of this number of respondents, only 32% are already paying, and most of them are from Tashkent region (50%). 68% do not pay and 87% are not ready to pay for online games, with comparatively high figures in Navoiy, Andijan, Syrdarya Oblasts and Tashkent City (100%).
Reading books or audiobooks online has a poor demand (39%), most of all in Surkhandarya Province (58%). At the same time, the majority (61%) do not use e-books platforms; the most votes for this option are seen in Jizzakh region (74%). Of the 351 respondents, 44% already pay to read books online, this is particularly common in Kashkadarya Province (81%). While 56% do not have paid subscriptions to online reading platforms; the lowest figures of respondents who already pay are in Navoiy Province (87%). A survey of 192 individuals shows that only 37% are willing to pay, with the highest share in Namangan Oblast (52%); 63% are not willing to pay, the majority of whom are residents of Syrdarya Province (100%).
90% of respondents do not listen to podcasts, and only 10% use online services to listen to them, especially in Bukhara Province (20%). 25% of the total number of respondents already pay for listening to podcasts, mostly residents of Bukhara oblast (20%). 75% do not pay and are not going to pay. 24% are ready to subscribe, and most of them are respondents from Kashkadarya region (53%).

Use of online news platforms has more positive indicators, as 74% read news online, especially in Jizzakh region (91%). 26% say they do not read news online, with the lowest share in Andijan Province (36%). Of the 665 survey participants, only 33% already pay for access to online news, with the majority of users from Kashkadarya Province (70%). Of the remaining 439 respondents, 26% are willing to pay for news, especially residents of Bukhara Province (36%).
Analytical information is in poor demand in Uzbek society, as 70% of 897 respondents say they do not use online analytical platforms, with minimum demand in Navoiy region (84%). The remaining 30% use platforms to analyze information, especially in Jizzakh oblast (49%). Of the 275 respondents selected for additional survey, 33% already pay for access to analytical servers, with the highest figures in Syrdarya Province (72%). Of the rest 186 respondents, 27% are ready to pay for subscriptions, with comparatively high share in Jizzakh oblast (50%).
Educational content is used by 46% of respondents, with the highest figures in Navoiy region (63%). At the same time, 54% do not use these online platforms, especially in Andijan region (63%). Out of 407 respondents, 45% already pay for access to online educational programs, especially in Syrdarya region (77%). Of 223 respondents, 42% are willing to pay for this content, with comparatively high rates in Surkhandarya Province (63%).

Table 3.4.4. *Online Content Consumption and Willingness to Pay*

	Online usage		Ready to pay for access:	
	2021	2023	2021	2023
Movies/TV series	30%	46%	32%	18%
Listening to music	44%	64%	36%	17%

Games	12%	24%	26%	13%
Reading books, audio books	17%	39%	77%	37%
Listening to podcasts	3%	10%	32%	24%
News	54%	74%	59%	26%
Analytics	7%	30%	36%	27%
Educational programs	12%	46%	71%	42%

The table above shows the following:
All types of online content show an increase in usage from 2021 to 2023. For example, the share of users using online music streaming services increased from 44% to 64%, podcast listening increased from 3% to 10%, and analytics usage increased from 7% to 30%.
The growing interest in online educational programs stands out in particular, the share of users consuming such content increased from 12% to 46%. The use of movies/TV series, games and books reading also increased significantly. The share of users receiving news online increased from 54% to 74%.
These changes reflect the dynamics of changing user interests and behavior in the online space, which can be linked to technological development, content accessibility, and changing preferences.
Users' willingness to pay for access to different types of online content decreased in 2023 compared to 2021. For example, the percentage of those willing to pay for movies/TV series decreased from 32% to 18%, for listening to music from 36% to 17%, and for news from 59% to 26%.
Willingness to pay for access to analytics remained relatively stable, but share of those who are ready to pay for access to educational programs declined from 71% to 42%.
Fewer users are willing to pay for access to reading books, audiobooks and listening to podcasts, but interest still remains. These changes may occur due to various factors, including availability of free content, economic situation, and competition in the online content market.

3.5. Social Networks

This section describes activity of respondents in social networks. It was found out that the majority (57%) of 906 respondents prefer to watch videos, especially in Namangan region (83%). The second most popular activity is purchase of goods and services online. Comparatively high figures for this activity are in Tashkent (30%).
Studying the dynamics of user activity in social networks for two time periods - 2021 and 2023 - reveals interesting trends in online behavior.
Looking at the data, we see the following changes:
- share of users commenting on content and information remained at 13% in 2021 and increased slightly to 14% in 2023.
- decrease in the proportion of those who publish their own news and posts - from 13% in 2021 to 11% in 2023. This may indicate a more passive attitude towards active content publishing.
- proportion of users posting photos, audio and video decreased from 20% to 12%. This is likely due to increase in specialized platforms for multimedia content.
- share of users searching for information about other users increased from 15% to 17% in the space of 2 years, which may indicate a growing interest in social ties.
- dating remained stable at 13%, indicating a balanced interest of users in this aspect.
- significant increase in the share of users ordering goods and services in social networks - from 13% to 19%. This factor reflects the increasing commercial interest and convenience for users when making purchases in social media platforms.
- share of those who watch videos increased markedly from 46% to 57%, reflecting the growing popularity of video content in social networks.
- the share of those who repost other people increased from 10% to 14%, emphasizing greater engagement with other members' content.
These changes may reflect the evolution of user interests, adaptation to changes in the media environment and increased commercialization on social platforms.

Table 3.5.1. *Respondents' Preference in Using Social Networks and Messengers (N=906)*

	2021	2023
Comment on some information/ content	13%	14%
Publish my news, post	13%	11%

Post photos, audio, video	20%	12%
Search for information about people	15%	17%
Dating	13%	13%
Purchases of goods and services	13%	19%
Watch videos	46%	57%
Repost other people`s content	10%	14%

3.6. Mass Media Credibility, Media Objectivity

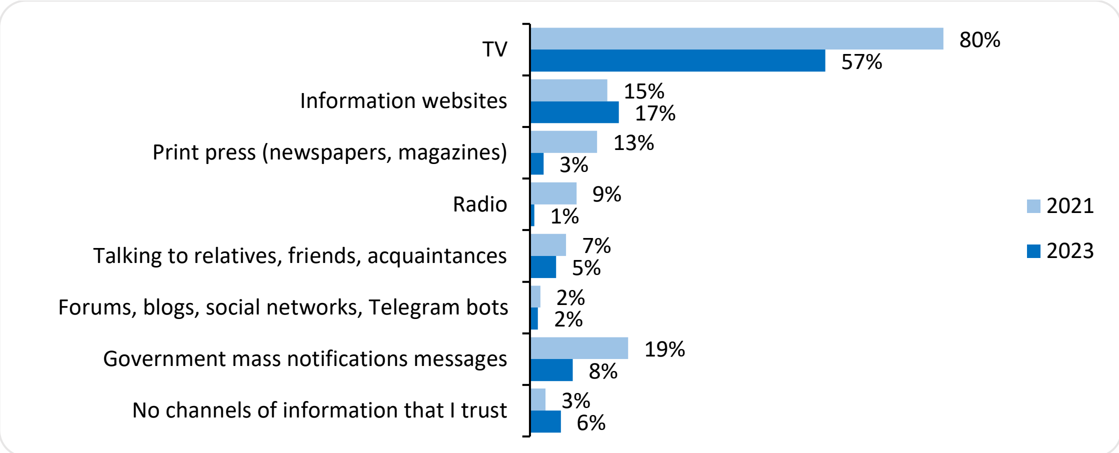
The next describes the main channels and sources trusted by respondents. As it was found out during the analysis, 57% of respondents have credibility to television, especially residents of Syrdarya region (73%). Then, 17% rely on information websites, relatively high rates of credibility to the Internet are seen in Navoiy region (30%). The third place in terms of credibility is occupied by government mass notifications messages (8%), especially trusted by respondents from Tashkent region (12%). Radio (1%) and forums, blogs, social networks and telegram bots (2%) turned out to be the least trusted by the people.

Analyzing the data in general for 2023, it can be seen that in Uzbekistan the most trusted source is television - 57% of respondents mentioned it as the main source of information. 17% of respondents have more credibility to online media.

Compared to data 2021, one can point out the tendencies as below:

- credibility to television has noticeably decreased - from 80% to 57%.
- share of those who trust print media has fallen sharply - from 13% to 3%.
- number of respondents who rely on government mass notifications messages has decreased from 19% to 8%.
- percentage of those who state that there are no credible channels has increased from 3% to 6%.

Diagram 3.6.1. *Information Channels Credibility Level (N=1018)*



Analyzing the data in terms of age groups, the following patterns can be seen:

Young people aged 14-18 years old most often trust Internet sources (19%), as well as information from friends and relatives (11%).

Respondents aged 19-29 also prefer online media (25%), but rely less often on their social circle (6%).

Middle-aged group (30-45yrs.) is more oriented towards television (59%), while its credibility to other sources is lower.

The older generation (46-65yrs.) almost unanimously mentions television as its main source of news (71%-88%). The credibility to the Internet is minimal. The older the respondents are, the more they trust television and less trust new online media.

Table 3.6.1. *Information Channels Credibility* Level by Age *(N=1018)*

	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
Television	50%	43%	59%	71%	88%
Information websites	19%	25%	17%	9%	4%
Print media (newspapers, magazines)	3%	4%	2%	2%	0%
Radio	2%	0%	1%	0%	0%
Conversations with relatives, friends, acquaintances	11%	6%	3%	4%	2%
Forums, blogs, social networks, Telegram bots	0%	3%	1%	2%	0%
Government mass notifications messages	9%	11%	8%	5%	5%
No channels of information that I trust	3%	8%	6%	6%	0%
Not sure	1%	1%	2%	1%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Considering social networks as a reliable source, it can be seen that 49% trust Telegram, especially residents of Namangan region (67%). The second place is occupied by YouTube (19%), which is trusted by residents of Syrdarya region (36%). Instagram takes the third place as it is trusted by 14% of respondents, most of all residents of Jizzakh region (33%).
According to the data provided we can see that in 2023 the most popular social network among the population of Uzbekistan remains *Telegram,* with the share of use of 49%. The second place is occupied by *WhatsApp* (7%), while the popularity of *Instagram* decreased to 14%. *YouTube* also showed a marked decline from 43% to 19%. It should be noted that *Facebook, LinkedIn, Twitter* and *Viber* are losing popularity and practically cease to be used.
Two-year comparative analysis:
When comparing data between 2021 and 2023, several interesting trends are seen:
Growth of Telegram: Showing the highest growth, Telegram increased its share by 26 percentage points over two years, indicating a significant increase in the popularity of this platform among the population.
Decline of Instagram and YouTube: Instagram and YouTube show a decline in popularity from 27% to 14% and from 43% to 19%, respectively. This may indicate a change of user interests and, probably, market saturation.
Decline of Facebook and other platforms: Facebook, LinkedIn, Twitter and Viber are also experiencing a significant decline in popularity or even almost cease to be used. This may be due to the fact that new platforms provide more opportunities for socializing and interesting content.
Decline of trust in social media: there has been an increase in the percentage of those who do not trust any platform, from 0% to 8%. This may indicate growing user awareness of data privacy issues and trust in social media in general.
In general, the data analysis indicates dynamic changes in preferences and trust of the Uzbek population in various social networks. Growth of Telegram and declining popularity of older platforms may indicate that users are looking for new ways of communication and have new necessities. At the same time, growing distrust may reflect an increasing awareness of privacy protection.

Table 3.6.2. *Social Media Credibility of Respondents (N=1018)*

	2021	2023
VKontakte	-	2%
WhatsApp	4%	7%
Instagram	27%	14%
Telegram	73%	49%
Google+	11%	11%
Facebook	19%	8%
YouTube	43%	19%
LinkedIn	4%	0%
Twitter	4%	0%
Viber	-	0%
Tik-Tok	-	1%
Moy Mir	-	0%
Odnoklassniki	-	1%
No social media that I trust	-	8%
Not sure	-	21%

According to data provided, it can be seen that Telegram has the highest level of credibility among both men and women. WhatsApp and Instagram also have a relatively high level of trust. YouTube has the highest level of credibility among women and Facebook has the highest trust level among men. The option “No social media that I trust” has the same share among both genders.
The general conclusion from this data can be as follows: Telegram remains the most trusted platform among both genders; some differences between genders are seen in the attitude towards other platforms such as WhatsApp, Instagram, YouTube and Facebook.
Data analysis on credibility of Uzbek population to social media with a breakdown into age groups, shows interesting dynamics and trends. The below mentioned points can be singled out:
Telegram advantages: Telegram dominates in all age groups, especially among young people (14-18 years old - 54%, 19-29 years old - 60%). This platform is distinguished by its reliability and functionality, making it preferred by users of all ages.
Youth and visual content: Youth aged 14-29 has high trust in visually-oriented platforms such as Instagram (23%-22%) and YouTube (24%-19%). This may indicate its interest in visual content and sharing experiences.

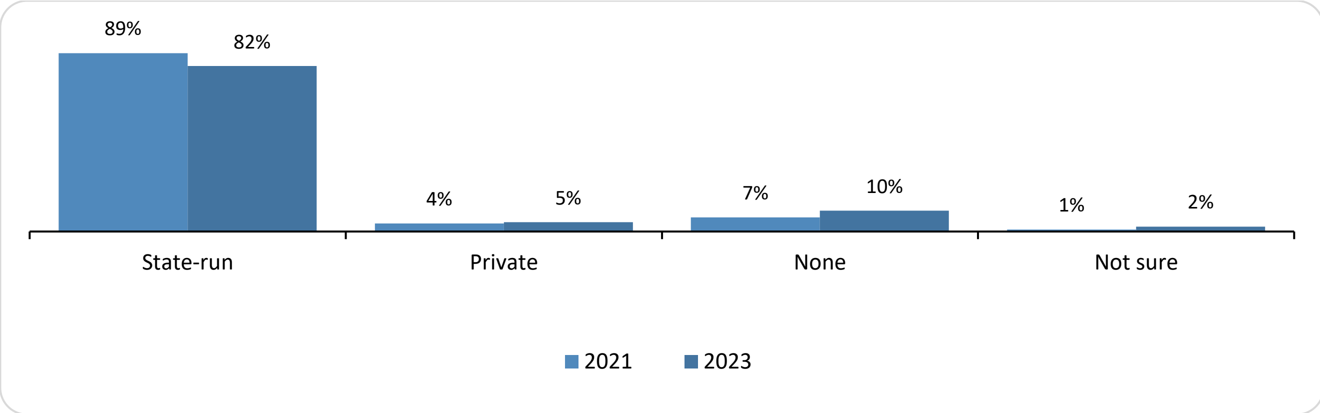
Declining interest with the age: Credibility to platforms declines with the age. For example, trust in Telegram drops from 54% in the 14-18 age group to 27% in the 61-65 age group. This may be linked to less active participation of older age groups in the digital environment.
Consolidation of Facebook and VKontakte: Platforms such as Facebook and VKontakte show reduced trust; it can be especially seen in young groups where their engagement is declining. This may reflect a shift in youth interest towards more innovative platforms.
No social media that I trust: The percentage of those who do not trust any platform increases with the age. This may be a result of increasing awareness of users relating to online risks and threats.
Overall, the analysis highlights the growing popularity of Telegram and young people's interest in visual content, as well as shows that credibility to platforms can vary significantly with the age. These trends emphasize the importance of adapting social media to different needs and providing safe and secure environment for users of all ages.

Table 3.6.3. *Social Media Credibility of Respondents by Age and Gender (N=1018)*

	Gender		Age				
	Male, n=509	Female, n=509	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
VKontakte	2%	2%	8%	1%	2%	0%	3%
WhatsApp	6%	9%	9%	9%	6%	7%	2%
Instagram	17%	11%	23%	22%	11%	7%	2%
Telegram	49%	50%	54%	60%	52%	33%	27%
Google+	11%	11%	18%	15%	11%	5%	0%
Facebook	9%	7%	3%	8%	10%	7%	2%
YouTube	17%	21%	24%	19%	20%	18%	7%
LinkedIn	0%	0%	0%	0%	0%	0%	0%
Twitter	1%	0%	1%	0%	1%	0%	0%
Viber	0%	0%	0%	0%	0%	0%	0%
Tik-Tok	2%	1%	2%	2%	1%	1%	0%
Moy Mir	0%	0%	0%	0%	0%	0%	0%
Odnoklassniki	1%	1%	1%	1%	1%	2%	3%
No social media that I trust	8%	8%	3%	4%	9%	13%	16%
Not sure	20%	22%	12%	14%	18%	36%	48%

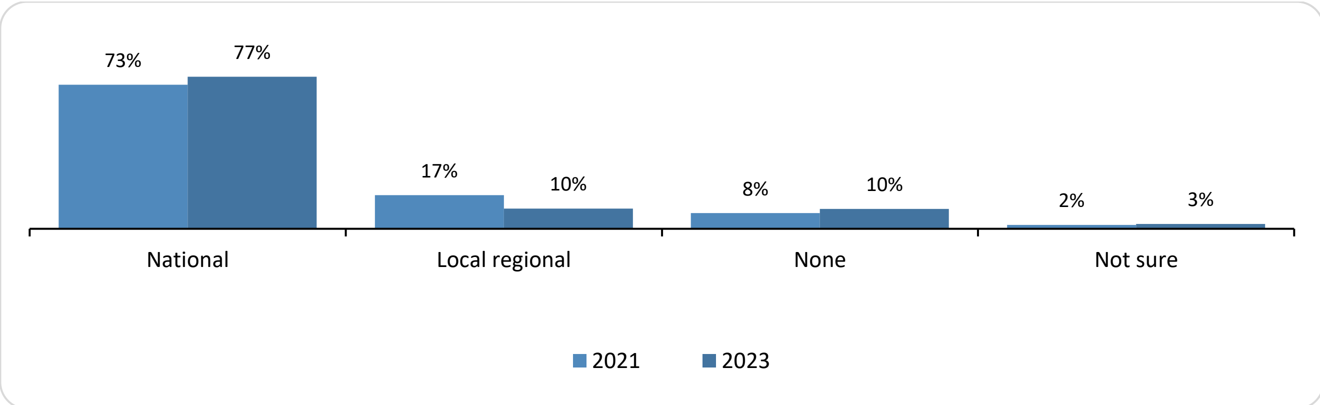
The table below shows the following changes in credibility to information sources from 2021 to 2023:
Government sources: Trust in government sources of information decreased from 89% to 82%. This may reflect an increase in critical attitudes towards official information and possible increase in access to alternative sources via the internet.
Private sources: Credibility to private sources of information increased slightly from 4% to 5%. This may be due to the growth of independent media resources and alternative sources of information.
Lack of trust: The proportion of those who do not trust any source increased from 7% to 10%. This may indicate increased skepticism and awareness of information manipulation.
Changes in credibility to information sources may be related to increasing access to a variety of sources via the Internet, proliferation of alternative views, as well as increasing awareness of distortions and manipulations in the information environment.

Diagram 3.6.2. *The Most Trusted Information Sources (TV Channels, Press, Websites) (N=1018)*



Analysis of data on credibility to different information sources for two time periods - 2021 and 2023 - revealed interesting trends. In the period from 2021 to 2023, trust in republican sources of information increased from 73% to 77%, indicating growing credibility to official and central sources. However, trust in local regional sources decreased from 17% to 10%; it has occurred possibly due to the growing influence of national and republican sources. The share of those who do not trust any source increased from 8% to 10%, which may reflect a stable discontent or skepticism towards information sources. These changes may reflect the growing importance of national and republican resources, influence of online media and social networks on credibility to information, as well as changes in the dynamics of preferences and trust of the Uzbek population in different information sources.

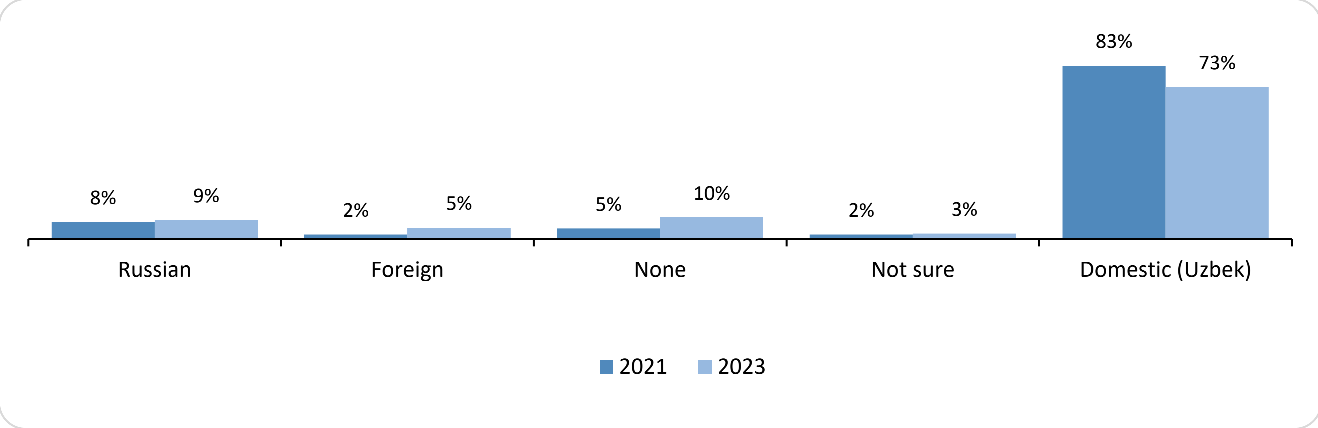
Diagram 3.6.3. *The Most Trusted Information Sources (TV Channels, Radio, Press, Websites) (N=1018)*



Analysis of data on trust in different sources of information for two time periods - 2021 and 2023 - shows interesting changes in preferences of the population of Uzbekistan.

Comparing the data between 2021 and 2023, we can see that trust in different sources of information has undergone significant changes. The share of trust in domestic (Uzbek) sources of information decreased from 83% to 73%, which may reflect greater access to alternative information resources and influence of foreign sources in the country's media landscape. In the meantime, credibility to Russian sources of information increased slightly from 8% to 9% and trust in foreign sources increased from 2% to 5%. These changes probably show a higher interest in international news and events. However, the percentage of those who do not trust any sources increased from 5% to 10%, and the percentage of those who are not sure increased from 2% to 3%. These figures may indicate an increasing level of skepticism and awareness of information perceived. The abovementioned changes in trust in information sources may occur due to different factors such as internet access, global events, and changes in the information environment. This analysis demonstrates how the diversity of sources and increasing awareness of media dynamics can shape people's views and preferences.

Diagram 3.6.4. The Most Trusted Information Sources (TV Channels, Radio, Press, Websites) (N=1018)



72% believe that Uzbek media have become more objective in their coverage of events, with the highest figures in in Fergana Province (85%). 14% think that nothing has changed, Tashkent residents support this opinion most of all (26%). 8% think that domestic mass media have become less objective over the last 2 years, with the highest share in Jizzakh region (17%).

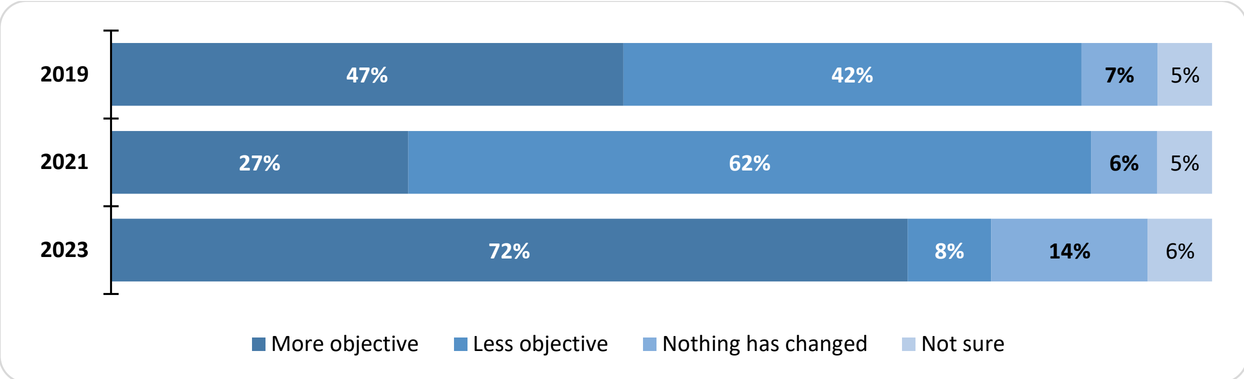
The table shows the following dynamics in the perception of objectivity of Uzbek media:

The share of those who believe that Uzbek media cover events more objectively has increased significantly from 47% in 2019 to 72% in 2023. This may imply the growing credibility to media and their more balanced information coverage.

However, the share of those who believe that Uzbek media cover events less objectively decreased from 42% in 2019 to 8% in 2023. This may indicate a decrease in criticism and more neutral assessment of media work.

The proportion of those who believe that nothing has changed relating to media objectivity has increased slightly from 7% in 2019 to 14% in 2023. It can mean that a portion of respondents still assess the media situation as stable. Changes in perceptions of the objectivity of Uzbek media may reflect improvements in media environment and efforts to cover the information in a more balanced way, which is seen in respondents' changing attitudes towards media work.

Diagram 3.6.5. Dynamics of Objectivity in the Uzbek Media Compared to 2 Years Earlier (N=1018)



3.7. Media Information Literacy. Critical Skills and Understanding of Online Safety Risks

This section aims to establish the level of media literacy of respondents. Within the framework of the survey, general skills of media literacy were analyzed. It was found out that 42% know how to collect information from different sources to get a full picture of the topic they are interested in. Comparatively high figures relating to gathering information in media are seen in Navoiy Province (70%). The second most popular is the ability to formulate search queries to find the necessary information on the Internet (34%), with the highest share of residents from Namangan region (54%). 25% of respondents do not have any of the abovementioned skills. 20% know how to determine whether the information found on the Internet is correct and trustworthy, respondents from Surkhandarya Province show the highest share (30%). The least common skill turned out to be the ability to distinguish a bot/troll from a real discussant (5%).

The data for 2023 shows that the highest percentage of respondents (42%) chose the option “Collect information from different sources”. The percentage of those who chose “Formulate search queries” is also high (34%). A significant percentage of respondents (25%) stated they could not do any of the above.
When comparing the data for three years, the following trends can be identified:
The proportion of those who can gather information from a variety of sources has remained relatively stable at around 40% in all three years.
There has been a notable increase from 2019 to 2021 in the proportion of respondents who can formulate search queries (from 21% to 34%), and this remains at the same level in 2023.
Significant decline is seen from 2019 to 2021 in the proportion of those who can notice differences between information and other messages (from 15% to 8%), but this figure has increased to 18% by 2023.
From 2019 to 2021, one can also see a growth in the proportion of respondents who can determine the reliability of information (from 16% to 24%), but by 2023 this has fallen to 20%.
There was a noticeable increase by 2021 in the share of those who can distinguish bots/trolls from real participants in discussions (from 4% to 14%), but this figure fell to 5% by 2023.
Overall, we see an upward trend in the proportion of respondents who cannot perform any of the activities specified: from 0% in 2019 to 25% in 2023.

Table 3.7.1. *Respondents' Skills in Dealing With Information (N=1018)*

	2019	2021	2023
Gather information from different sources	39%	43%	42%
Formulate search queries	21%	34%	34%
Identify the differences between information and other messages	15%	8%	18%
Determine whether the information found on the Internet is correct and credible	16%	24%	20%
Distinguish a bot/troll from a real discussant	4%	14%	5%
Can understand that a certain TV program is suitable for children and adolescents	20%	16%	17%
Identify hidden information about additional payments for services	5%	27%	9%
None of the above	0%	3%	25%

In general, women show slightly higher levels of media literacy than men. For example, 45% of women indicate that they are able to gather information from a variety of sources, compared to 39% of men. Women are also more likely to be able to determine credibility of information (22% vs. 19% for men) and identify age ratings of TV shows (18% vs. 16%). At the same time, men slightly outperform women in their ability to formulate search queries (36% vs. 33% for women) and identify hidden information about additional payments (10% vs. 8%). As for other indicators, the differences between men and women are not significant. For example, comparable equal shares of respondents of both genders can notice the difference between information and other messages (17% of men and 19% of women), and distinguish between bots and trolls in online discussions (6% and 4%).
The highest scores for most media literacy skills are demonstrated by young people aged 14-29. For example, 47-48% of 14-18 and 19-29-year-olds can gather information from different sources. 47% of 14-18-year-olds and 46% of 19-29-year-olds know how to formulate search queries.
In the 30-45 age group, the results for media literacy are also quite high, but slightly lower than for young people. Thus, 44% of respondents in this group can work with information from different sources, and 32% can formulate queries.

The level of media literacy decreases noticeably with the age. In the group aged 46-60, 30% of respondents can gather information and 20% can formulate search queries. Among pre-retirees aged 61-65, these indicators are even lower - 33% and 9%, respectively.

The rest of the parameters show similar age dynamics. Thus, young people demonstrate the highest level of media literacy, which decreases with the age. Therefore, it is necessary to improve media competencies among older generations.

Table 3.7.2. *Respondents' Skills in Dealing With Information Among Different Age Categories (N=1018)*

	Gender		Age				
	Men, n=509	Women, n=509	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
Gather information from different sources	39%	45%	47%	48%	44%	30%	33%
Formulate search queries	36%	33%	47%	46%	32%	20%	9%
Identify the differences between information and other messages	17%	19%	14%	19%	18%	16%	21%
Determine whether the information is correct and credible	19%	22%	26%	27%	19%	15%	5%
Distinguish a bot/troll from a real discussant	6%	4%	4%	8%	5%	2%	0%
Can understand that a certain TV program is suitable for children and adolescents	16%	18%	14%	21%	16%	17%	9%
Identify hidden information about additional payments for services	10%	8%	8%	11%	10%	6%	1%
None of the above	23%	27%	14%	19%	25%	34%	49%

Analyzing the data 2023, it can be noted that the largest percentage of respondents (49%) chose the option *Propaganda*. The share of those who indicated *Fake news* is also high (43%). A significant percentage (38%) answered *Financial Fraud.*

When comparing the figures between 2021 and 2023, the following trends are seen:

One can see significantly increased concern about propaganda (from 39% to 49%) and fake news (from 24% to 43%).

There has been a noticeable decrease in the proportion of those concerned about misinformation (from 46% to 14%).

The attitude to such phenomena as Internet addiction, information wars, factchecking, and activities of trolls and bots has remained almost the same.

Financial fraud on the Internet (38%) is a new challenge that is included in the top of burning issues by 2023.

Table 3.7.3. *Knowledge of Media Literacy Concepts*

	Percentage of those who know the concept	
	2021	2023
Disinformation	46%	14%
Propaganda	39%	49%
Compromising information	15%	13%
Internet addiction	36%	35%
Information war	27%	32%
Fake news	24%	43%
Media literacy	28%	33%
Fact-checking	15%	16%
Troll, bot	12%	10%
Social media algorithms	13%	15%
Financial fraud	-	38%

From a perspective of locality, urban residents are more aware of such a concept as misinformation (16%) than those in villages (12%). This trend is also observed in other issues, for example, 51% of urban respondents know what propaganda is, compared to 47% in villages. The meaning of compromising information is the least known to respondents, only 16% in urban areas and 10% in rural areas.

The following indicators show that 35% of respondents know what *Internet addiction* is, especially in Tashkent region (49%). 32% have a notion of *information wars*, with comparatively high figures in Namangan Province (48%). 43% know about *fake news*, the highest figures (64%) are seen in Tashkent.

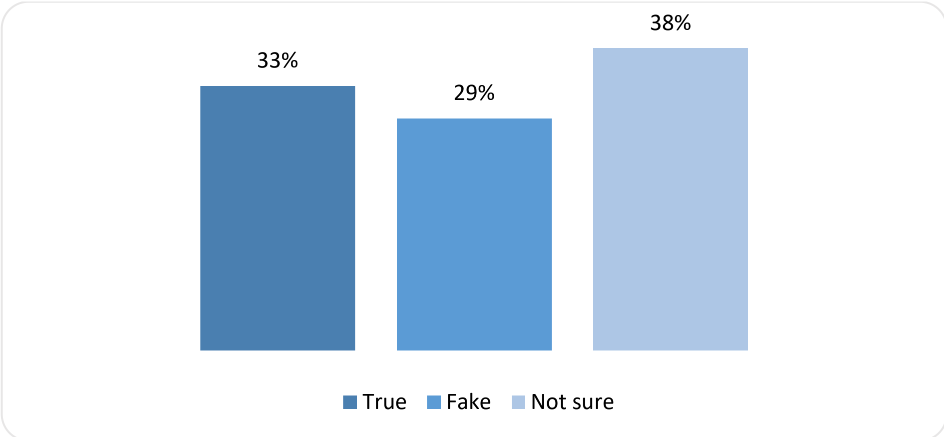
33% of the total number of respondents in the regions of Uzbekistan know what *media literacy* is, especially in Syrdarya Province (48%). *Factchecking* is less familiar, as only 16% of respondents know about it, while 26% of respondents in Tashkent region know about it the most. Such a concept as *troll/bot* is known only by 10%, residents of Namangan region and Tashkent (20%) are most aware of it.
15% of respondents know such a concept as *social media algorithms*, of which 25% are from Navoiy region. 38% know about *financial fraud*, and residents of Andijan Province (51%) are most aware of it.

Ability to Identify Fake News

Within the framework of the survey, the respondents were given the news that is widely spread in the society. However, not everyone can distinguish whether it is true or fake. One of the objectives of the survey was to determine the proportion of respondents who can distinguish between fake and truth.

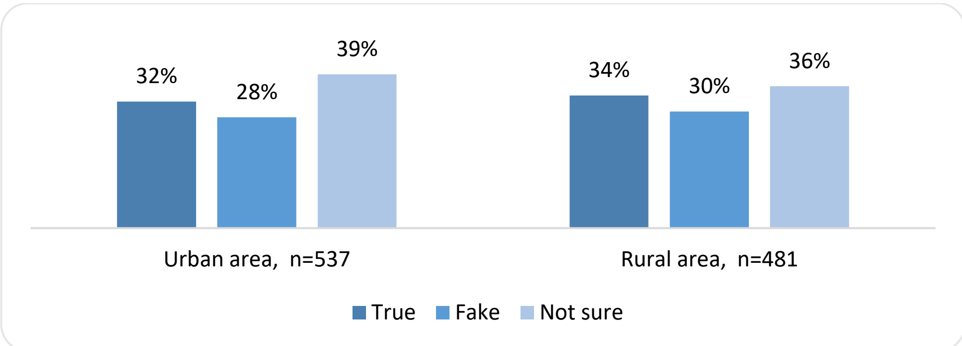
One of the news items is: "By presidential edict, it is reported that all students studying abroad are allowed to transfer their credits to Uzbekistan." The votes are divided into three main opinions: 33% believe it to be true, 29% - fake and the majority (38%) cannot positively identify. Residents of Navoiy Province are the most likely to believe it is true (45%), while those in the Republic of Karakalpakstan are the most likely to believe it is fake (52%).

Diagram 3.7.1. *By Presidential Edict, it is Reported That All Students Studying Abroad are Allowed to Transfer Their Credits to Uzbekistan (N=1018)*



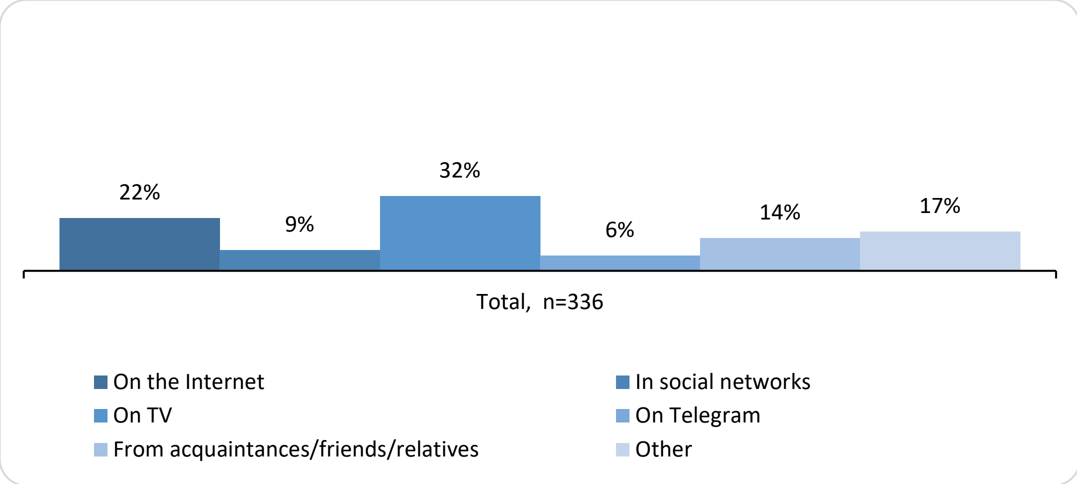
From a perspective of locality, no differences in the rates between urban and rural areas are noticed, as 32% of urban and 34% of rural residents, consider the news to be true. However, 28% of urban respondents and 30% of rural respondents consider it fake.

Diagram 3.7.2. *By Presidential Edict, it is Reported That All Students Studying Abroad are Allowed to Transfer Their Credits to Uzbekistan*



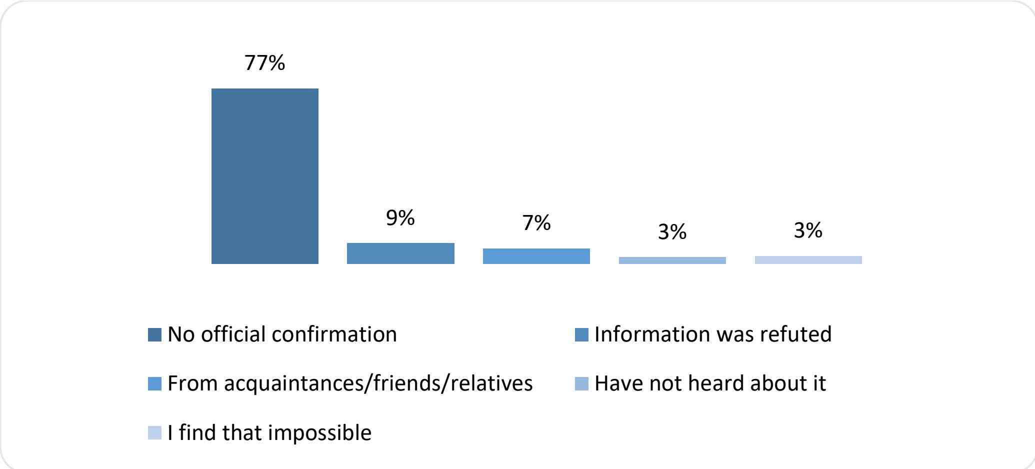
Of those 33% (336 respondents) who believe that the news is true, another survey was conducted on the source of this news. 32% of the remaining respondents claim to have seen the news on TV. 22% say they saw it on the Internet, and 14% heard the news from acquaintances/friends/relatives.

Diagram 3.7.3. *Please, specify where you may have seen this news:* By *Presidential Edict, it is Reported That All Students Studying Abroad are Allowed to Transfer Their Credits to Uzbekistan (N=336)*



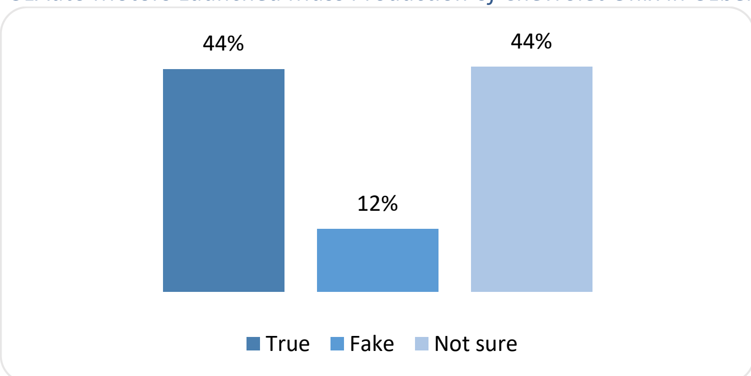
Of the 301 respondents who believe this information is fake, 77% do not believe it because there is no official confirmation. 9% state that the information has been refuted and 7% have heard refutations from friends and acquaintances.

Diagram 3.7.4. *Please, specify why this information is a fake: By Presidential Edict, it is Reported That All Students Studying Abroad are Allowed to Transfer Their Credits to Uzbekistan (N=301)*



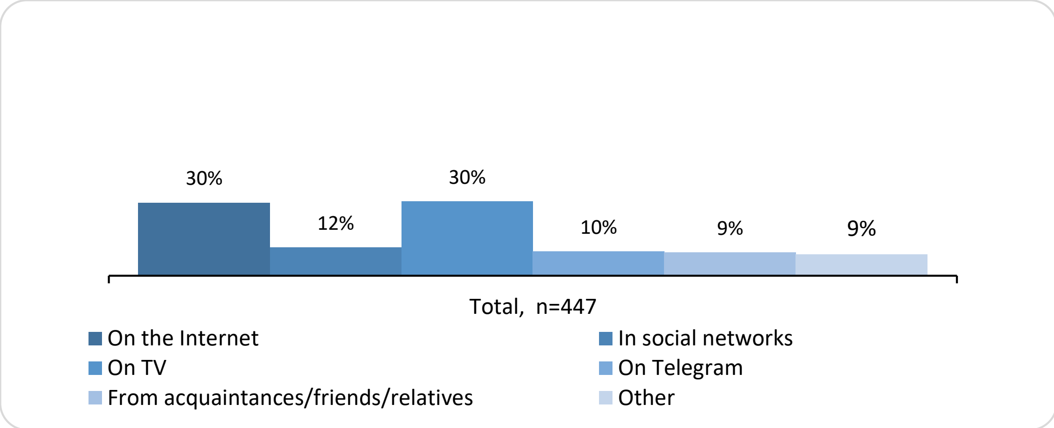
The second news about launching production of Chevrolet Onix cars in Uzbekistan seemed more credible than the previous one. 44% believe that this news is real, especially in the Republic of Karakalpakstan (51%). The same number of respondents find it difficult to answer, but 12% still believe it is a fake, the majority are respondents from the Republic of Karakalpakstan (20%).

Diagram 3.7.5*. UzAuto Motors Launched Mass Production of Chevrolet Onix in Uzbekistan (N=1018)*



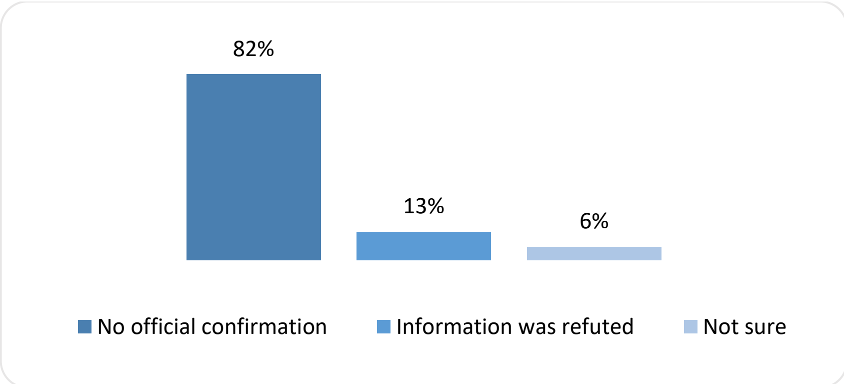
Of the 447 respondents who believe the news to be true, 30% claim to have seen the news online. Another 30% say they watched it on TV, 12% read it on social media, and 10% saw it on Telegram.

Diagram 3.7.6. *Please, specify where you may have seen this news:*
UzAuto Motors Launched Mass Production of Chevrolet Onix in Uzbekistan (N=447)



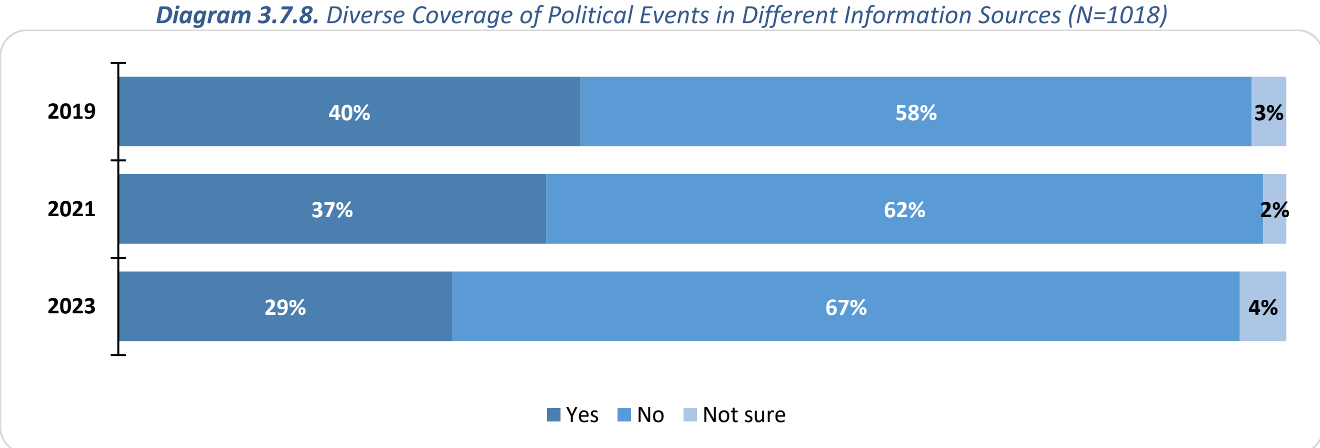
Of the 128 respondents who believe the news is fake, 82% say there is no official confirmation and 13% say the information has been refuted.

Diagram 3.7.7. *Please, specify why this information is a fake:*
UzAuto Motors Launched Mass Production of Chevrolet Onix in Uzbekistan (N=128)



In 2023, only 29% of respondents have experienced a situation when the same political event was interpreted differently in the media. The vast majority (67%) did not face such situations. This suggests that in 2023, the majority of respondents did not notice an apparent difference in political news coverage.
Analyzing the dynamics from 2019 to 2023, we can see a gradual decline in the share of those who have experienced conflicting media coverage of politics - from 40% to 29%. At the same time, the number of those who have not faced it is growing, from 58% to 67%.

Diagram 3.7.8. *Diverse Coverage of Political Events in Different Information Sources (N=1018)*



Analyzing the respondents' answers for 2023, we can see that the largest share (32%) chose the option “I compare information with what is written/shown in other media”. 24% of respondents indicated that they would not take any steps. 16% trust only one source of information.
Analyzing the data of 2019 and 2023, the following trends can be seen:
The share of those who will compare information from different sources is growing - from 22% in 2019 to 32% in 2023. People are more likely to be critical and willing to see different perspectives.
The percentage of respondents who defer to opinions of other people and form their own opinions thereupon is decreasing (from 23% to 16%).
The percentage of those who will not take any action decreased from 29% to 24%. People have become more involved and interested in analyzing information.
In general, the activity of citizens in comprehending and comparing political news from different sources is increasing.

Table 3.7.4. *Actions in Case of Different Coverage of the Same Political Event (N=293)*

	2019	2021	2023
Share my observations on social media	11%	8%	10%
I trust only one source of information from which I always get information	14%	27%	16%
I ask the opinion of friends, relatives, acquaintances and make my own conclusion	23%	20%	16%
Compare information with what is written/shown in other media sources and make my own conclusion	22%	34%	32%
Do not take any steps	29%	11%	24%
Not sure	-	0%	2%

Analyzing the data for 2023, we can see that 44% of respondents have very rarely or never experienced the feeling of being deceived by the media. 30% noted that they had experienced this quite rarely. 11% have experienced the intrusion of false information or viewpoints quite often. 9% have experienced this very often or constantly.
Analyzing the dynamics from 2019 to 2023, the following trends can be emphasized:
- percentage of those who very rarely or never experienced the feeling of being deceived by the media decreased from 68% to 44%.
- percentage of respondents who have quite or very often felt the intrusion of false information or viewpoints increased from 12% to 20%.
- percentage of those who found it difficult to answer decreased from 6% to 3% in 2021.

Table 3.7.5. *Frequency of Experiencing Deception When Receiving Information from Media (TV shows, Radio, Newspapers and Magazines, Online Media) (N-1018)*

	2019	2021	2023
Very often or constantly	7%	5%	9%
Quite often	5%	11%	11%
Rather rarely	15%	31%	30%
Hardly ever or never	68%	51%	44%
Not sure	6%	3%	6%

42% of respondents answered that they would search for information on the Internet, residents of Andijan region maintain this principle the most (52%). 27% will not take any steps in this regard. 23% will ask the opinions of friends and relatives, especially respondents from Namangan region (34%). 22% of respondents will search for information on TV channels. The least popular ways were reading about information in newspapers (8%), listening to news on the radio (6%) and contacting the editorial office to clarify the situation (5%).
Analyzing the data for 2023, we can see that 42% of respondents will use the Internet to verify the facts when faced with incomplete or unreliable information in the media. 22% will look for confirmation on TV, 8% - in print media. 27% will not take any actions to clarify the information.

Analyzing the dynamics from 2019 to 2023, the following trends can be highlighted:
- share of those who will use the internet to verify information is growing - from 28% to 42%. The Internet is becoming the main source for data verification.

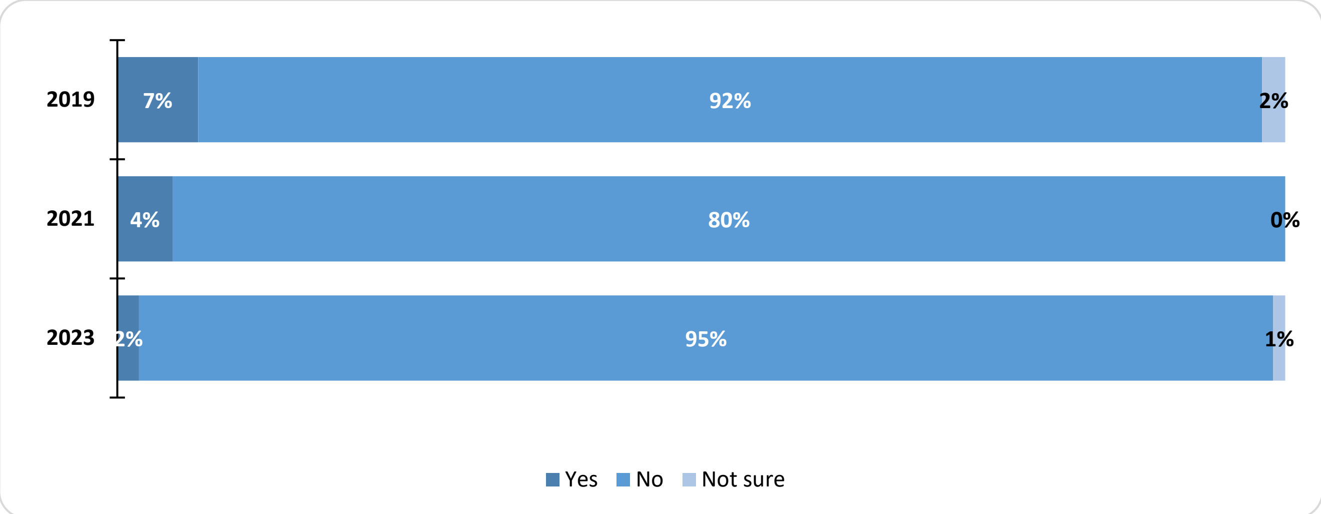
- percentage of respondents who will not take any steps decreased from 41% to 27%. People have become more motivated to seek credible information.
- percentage of those who will ask for clarification in the editorial office of the source of unverified information decreased from 8% (in 2021) to 5% (in 2023).

Table 3.7.6. *Imagine that you heard a news story that was important for you in one of the media outlets, but the information was incomplete or unreliable. What will you do to clarify or verify this information? (N=1018)*

	2019	2021	2023
Search for information online	28%	40%	42%
Turn to friends, relatives, acquaintances	20%	28%	23%
Search for information in newspapers or magazines	-	-	8%
Search for information on TV channels	-	-	22%
Listen to the news on the radio	-	-	6%
I will seek clarification from the editorial office of the source of dubious or incomplete information (i.e. editorial office of TV, radio, newspaper, website)	1%	8%	5%
I won't do anything/I won't waste time checking and clarifying the information	41%	29%	27%
Not sure	5%	2%	3%

Then the respondents were asked a question to find out whether they go to the editorial office of a newspaper or magazine, TV channel or radio station to find out the credibility of information, to complain or report a problem. 95% have not had to contact the editorial office, only 2-3% have written to the editorial office a couple of times.
Based on the data 2023, it can be seen that the vast majority of respondents (95%) have never contacted media editorial offices to verify information, complain, or report a problem. Only 2% have done so.
Studying the dynamics from 2019 to 2023, the following trends can be noted:
- percentage of those who have contacted media editorial offices decreased from 7% in 2019 to 2% in 2023.
- percentage of respondents who have never done so increased from 92% to 95%.
- percentage of those who found it difficult to answer decreased from 2% to 1%.

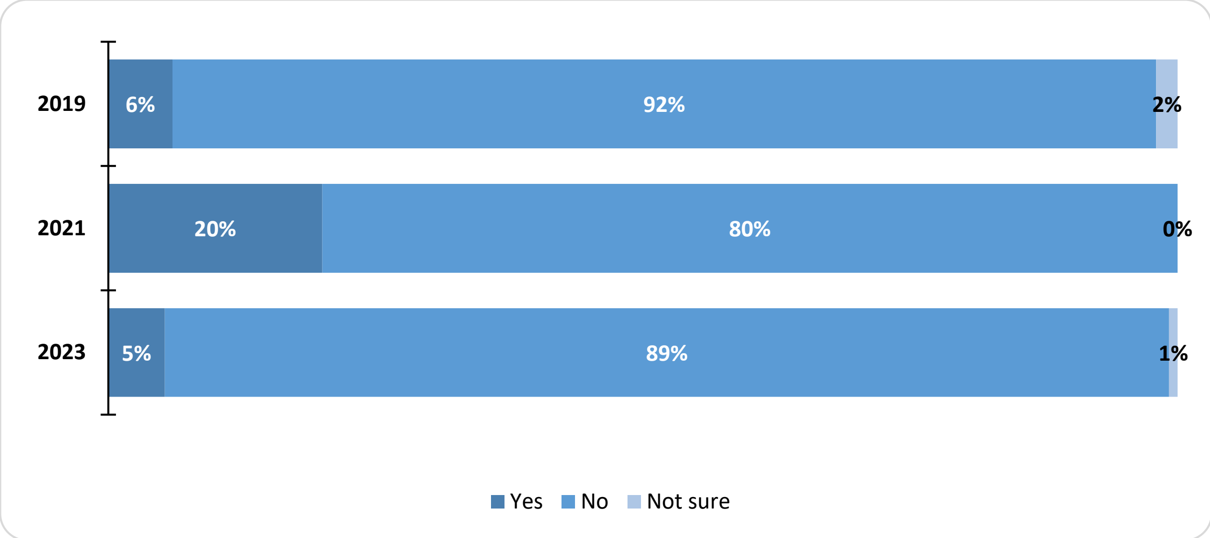
Diagram 3.7.9. *Have you ever contacted a newspaper or magazine editorial office, TV channel or radio station to ask for accuracy of information, to complain or report a problem? (N=1018)*



89% of respondents did not call on live radio or TV programs. Only 7% did call a couple of times, and most of them are residents of Navoiy region (20%).
Analyzing the 2023 data in more detail, we see that the vast majority of respondents (89%) have never called on live radio or TV programs. Only 5% of respondents had experience of participating in interactive programs.
The dynamics of recent years shows interesting trends. In 2019, the percentage of those who call on live radio or TV programs was 6%, rose to 20% by 2021, and then dropped sharply back to 5% in 2023.

This sharp increase in calls in 2021 was probably due to some significant events in the information field that triggered a strong audience reaction. However, with the course of time, the situation returned to normal and the level of citizen engagement in interactive broadcasting returned to its previous low levels.
In general, the overwhelming number of people remain passive observers, not seeking direct participation in the media. This may indicate a lack of motivation, habit of public speaking or lack of trust in the effectiveness of such form of interaction.

Diagram 3.7.10. *Participation of Interactive Formats of Mass Media (Call-in Shows, Voting, Messages from Viewers, Entertainment) (N=1018)*



Assessment of Information Literacy and Digital Skills Level

In this section we analyze the level of information literacy and digital competencies of respondents. For more detailed analysis, this section is divided into two parts:

1. Information literacy skills and competencies
2. Index of information literacy and digital competencies.

In the first part, we will analyze what information security skills and digital competencies respondents can use in practice. Respondents were asked what specific measures they take to ensure the security of their personal data. Responses were shown in the form of three options: “Can do it”, “Can apply in practice” and “Cannot do it”. In this part of the section, we will assess the percentage of respondents who selected options “Can do it” and “Can apply in practice” to determine how widespread these skills are among the Uzbek audience.

1. Information literacy skills and competencies

As follows from the survey, 45% know how to delete their online activity history, especially residents of Jizzakh region (69%). 35% say that they know how to change passwords on the computer and on online services, with the highest figures in Jizzakh region (64%). As for changing settings of access to their information in social networks for different groups of users, only 30% of 1018 respondents know how to do it, with the highest proportion of respondents in Tashkent region (43%).
Analyzing the results of the survey, we can conclude that the majority of respondents do not have sufficient skills and do not take necessary actions to ensure the safety of personal data on the Internet.
Thus, only 17-45% of respondents know how to perform various operations to protect information online: delete activity history, change passwords and privacy settings in social networks, clean the computer from unnecessary files. However, only a few people actually use these skills, from 1% to 5% of respondents.
The indicators for such important aspects of information security as creating backup files (30% know how to do it, 3% use it in practice) and recognizing Internet fraud (21% and 1%, respectively) were particularly low.

Table 3.7.7. Availability of Skills to Ensure Data Security (N=1018)

	Can do it:	Do it:	Cannot do	Not sure
Clean my history of online activity	45%	5%	47%	3%
Change passwords on the computer and on online services	35%	4%	58%	2%
Change settings for access to your information in social networks for different groups of users	30%	4%	63%	2%
Create multiple user accounts for the same computer	17%	2%	79%	2%
Clean my computer from unnecessary files	39%	4%	55%	2%
Scan my computer for viruses	31%	3%	64%	2%
Back up files stored on the computer	30%	3%	66%	2%
Use the parental control features on my computer	19%	2%	76%	3%
Detect the situation of cyber extortion	21%	1%	74%	4%
Determine the security level of personal data transfer when using online services	22%	2%	72%	4%

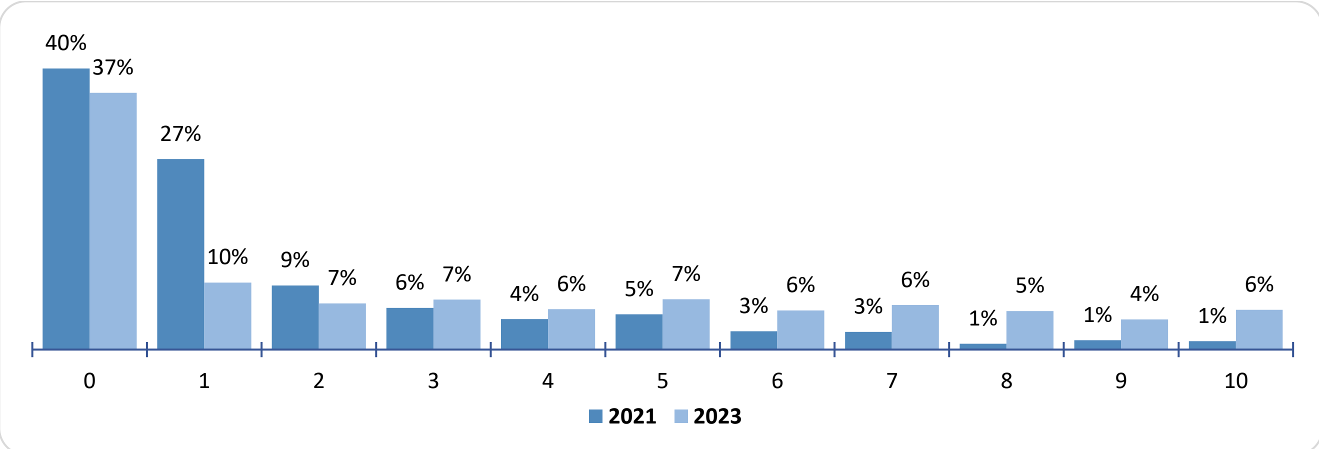
2. Index of Information Literacy and Digital Competencies

In this part of the section we will analyze the index of information literacy and digital competencies. This index was formed on the basis of respondents' answers to 10 statements related to information security skills and digital competencies. Each respondent received an individual score equal to 1 if he/she selected the options "Can do it" and "Can apply in practice" and 0 if he/she selected "Cannot do it". Thus, we will determine the index of information literacy and digital competencies of each respondent, which can range from *0* to *10.* This index will allow us to assess more accurate the level of digital literacy and competence of our respondents. In order to identify changes and dynamics in the level of information literacy, we will also conduct a comparative analysis of indexes for 2021 and 2023.

Thus, the analysis results of indexes for 2023 show positive dynamics in the level of information literacy and digital competencies of the population of Uzbekistan. In particular, the share of respondents who scored *0* points decreased from 40% in 2021 to 37% in 2023. It is also interesting to note that if in 2021 the absolute majority of respondents (76%) scored between 0 and 2 points, then in 2023 this indicator has slightly improved, more than half of respondents (53%) scored between 0 and 2 points. The share of those who scored the maximum score of 10 points increased as well, from 1% to 6%. At the same time, countrywise average score increased slightly from 1.7 to 3.2. Thus, despite the persisting high percentage of the population with extremely low digital literacy, in general one can see a positive dynamics of growth in the level of information literacy and digital competencies of the citizens of Uzbekistan.

Countrywise average score:
2021 – 1,7
2023 – 3,2

Diagram 3.7.10.1. *Distribution of Respondents by Index in Terms of Information Literacy and Digital Competency (Percentage Share in Terms of Index Value)*

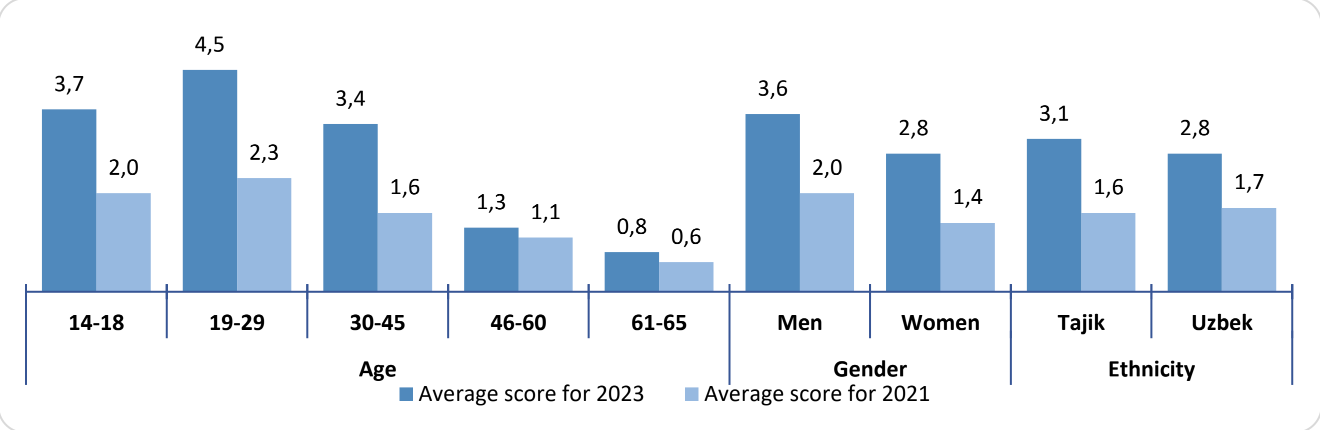


Having analyzed the data of the index with regard to information literacy and digital competencies in the context of age groups, gender and ethnicity, the following conclusions can be drawn:

- The highest indicators of information literacy are traditionally demonstrated by young people aged 14-18 (growth from 2 to 3.7) and middle-aged people of 19-29 years old (growth from 2.3 to 4.5) – the leadership of these age groups was held both in 2021 and 2023. The level of information literacy naturally decreases with age, and this trend is still on in both 2021 and 2023. The lowest indicator (0.8 points) is noted in the older group aged 61-65.
- Positive dynamics is observed in increase of the level of information literacy among both men (from 2 to 3.6) and women (from 1.4 to 2.8) compared to 2021. At the same time, the growth is particularly noticeable among men whose level of information literacy is higher in both 2021 and 2023.
- By ethnicity, Uzbeks are the leaders, whose average score increased significantly from 1.6 in 2021 to 3.1 in 2023. Tajiks living in Uzbekistan also show positive dynamics (growth from 1.7 to 2.8).

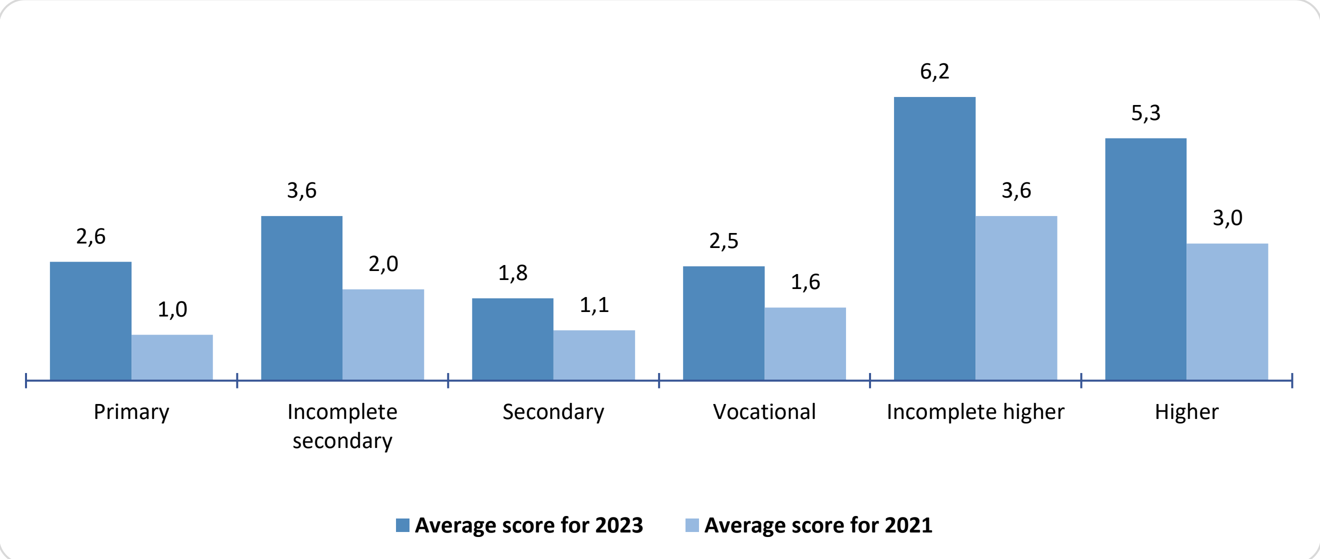
Thus, the most 'vulnerable' groups in the field of information literacy and digital competencies in Uzbekistan are the elderly and women. Special-purpose programs are required to improve their information literacy and overcome the digital gap.

Diagram 3.7.10.2. *Average Score of Respondents on Media Literacy and Digital Competency Index by Age, Gender and Ethnicity*



Analyzing the data on the level of information literacy in Uzbekistan by education, it can be noted that in all educational groups there is a positive dynamics of growth of the average score from 2021 to 2023. Thus, the highest rates and growth of digital competencies are observed among those with incomplete (from 3.6 to 6.2) and complete higher education (from 3 to 5.3). The lowest level of information literacy is shown by respondents with secondary education (1.8 points).

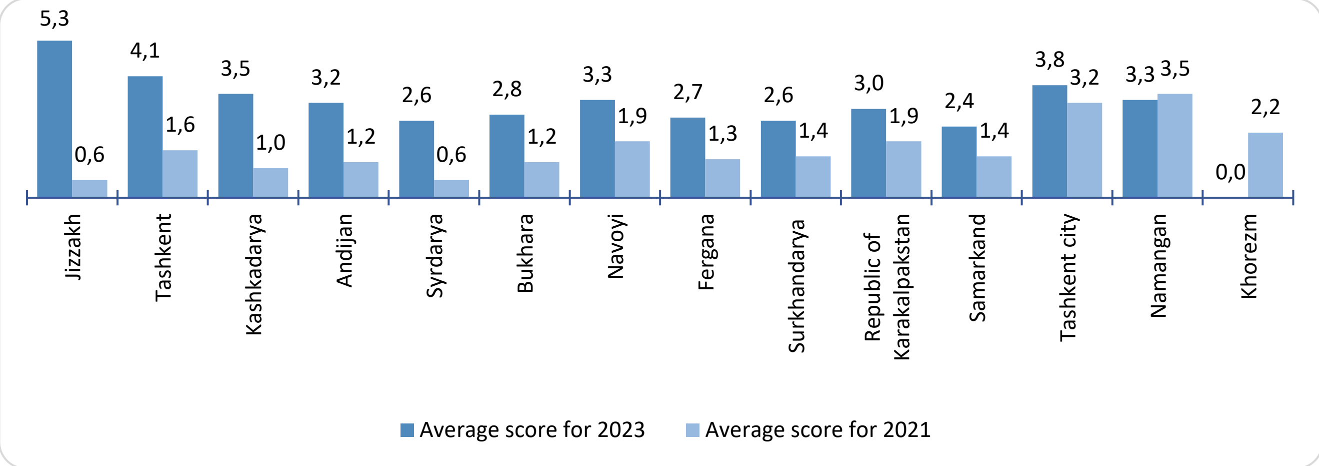
Diagram 3.7.10.3. *Average Score of Respondents on Media Literacy and Digital Competency Index by Educational Level*



Having analyzed the data on the level of information literacy in the context of regions of Uzbekistan, it can be noted that in almost all provinces there is a positive growing dynamics of the average score from 2021 to 2023:

- The highest scores and significant growth of the information literacy index are observed in Jizzakh (from 0.6 to 5.3) and Tashkent Provinces (from 1.6 to 4.4), as well as in the capital city of Tashkent (3.8).
- The lowest results in 2023 are seen in Samarkand (2.4), Surkhandarya (2.6), Syrdarya (2.6) and Fergana provinces (2.7).

Diagram 3.7.10.4. *Average Score of Respondents on Media Literacy and Digital Competency Index by Regions*



Internet Threat Perception

As it was found out, 40% are concerned about malicious sites with viruses, especially residents of Syrdarya region (74%). 35% are not concerned about anything when using the Internet. 28% do not like the abundance of advertising, this opinion is supported most by respondents from Namangan region (45%). 21% are concerned about resources with negative and illegal content. The least concerning factor is intrusion of viewpoints, for example, when covering conflicts (8%).
Analyzing the data for 2023, we can see that users (40%) are most worried about malicious sites and viruses on the Internet. 28% of respondents are concerned about excessive amount of unfair advertising online. This is followed by concerns about resources with negative content (21%), as well as possible private data theft (19%).
The dynamics of recent years shows increased concerns about all major aspects of internet security. If in 2019 only 26% bewared of viruses, then by 2023 the share has risen to 40%. Concerns about identity theft have also increased, from 3% to 19%.
Along with this, the percentage of those who are not worried about anything on the Internet increased from 15% to 35%. This may be due to the increased confidence of some users in their own security ensuring skills. Nevertheless, in general, there is a tendency towards increasing concern about various aspects of Internet security. This requires further improvement of media literacy with respect to risks in online environment.

Table 3.7.8. *The Most Pressing Issues About the Internet (N=1018)*

	2019	2021	2021
Malicious websites (viruses)	26%	30%	40%
Resources with negative and illegal content	4%	16%	21%
Posting personal information that can be used by intruders	3%	14%	19%
Ignoring the real problems, smoothness of a common picture	-	8%	9%
Abundance of deceptive advertising	-	30%	28%
Pseudoscientific propaganda	-	13%	13%
Excessive religious content	-	15%	14%
Obtruding a point of view, e.g. when reporting on conflicts	-	-	8%
Nothing causes concerns	15%	30%	35%
Not sure	2%	5%	0%

Analyzing the data of the survey conducted in Uzbekistan, one can trace differences in the perception of Internet risks among different age groups.

Young people aged 14-29 are most afraid of malicious sites and viruses (50%). They are also concerned about abundance of unfair advertising online (24-34%) and possible identity theft (21-25%).
Middle-aged respondents (30-45yrs.) are also primarily concerned about viruses (40%), but to a lesser extent about advertising (32%) and data theft (20%).
People over 45 years old are significantly less likely to indicate technical aspects of Internet security, more than half of them (51%) said they are not concerned about anything on the Web.

Table 3.7.9. *The Most Pressing Issues About the Internet Among Respondents (N=1018)*

	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
Malicious websites (viruses)	50%	50%	40%	24%	20%
Resources with negative and illegal content	23%	26%	21%	11%	18%
Posting personal information that can be used by intruders	21%	25%	20%	13%	8%
Ignoring the real problems, smoothness of a common picture	8%	12%	7%	7%	7%
Abundance of deceptive advertising	24%	34%	32%	20%	14%
Pseudoscientific propaganda	10%	17%	12%	10%	9%
Excessive religious content	16%	15%	15%	10%	6%
Obtruding a point of view, e.g. when reporting on conflicts	4%	10%	8%	8%	6%
Nothing causes concerns	29%	29%	32%	51%	51%

Next, respondents were asked to make certain judgments related to media and mass media, and the task is to understand whether they agree or disagree with them. The first judgment is as follows: "Newspapers, TV channels and Internet portals in Uzbekistan are both state-owned and private". According to the analysis results, 75% agree with this statement, 88% of them are residents of Fergana Province. The second judgment says: "Only state media can make quality products". 61% of respondents agree with it, with the highest figures in the Republic of Karakalpakstan (82%).
Other judgments were also given, such as: "Internet, first of all, is a resource for entertainment and communication". This news is considered true by 56% of respondents, of which the majority of votes fall on Jizzakh region (79%). The second statement: "Thoughts and behavior of a person by no means depend on the information he/she consumes in mass media" was approved by 58% of respondents, with comparatively high figures in Navoiy Province (80%).
Analyzing the data for 2023, we can see that the majority of respondents agree that the Internet is primarily a means of entertainment and communication (56%), and that information published online can negatively affect a person's reputation and career (72%).
At the same time, there is a tendency to overestimate the possibilities of being anonymous on the Internet; 37% believe that it is possible to remain anonymous online, and 21% believe it is acceptable to pass on personal passwords to third parties.
Analyzing the dynamics from 2019 to 2023, one can see increased assurance of respondents that only state media can make quality content (from 71% to 61%). The share of those who see the Internet as a mere entertainment increased as well (from 22% to 56%).

Table 3.7.10. *Do You Agree or Disagree with the Judgement (N=1018)*

	Percentage of those who agree		
	2019	2021	2023
Newspapers, TV channels and Internet portals in Uzbekistan are both state-run and private	41%	79%	75%
Only the state-run media can make quality products	-	71%	61%
Internet is primarily a source for entertainment and communication	22%	60%	56%
Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	33%	53%	58%
When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	42%	56%	45%
Internet allows you to keep anonymity - the user cannot be identified	33%	36%	37%
Some messages/information posted by a person online can negatively affect his/her career and private life	55%	72%	72%

It is sometimes permissible to give someone information about your passwords, code keys (at the bank, in the Internet)	16%	26%	21%

Analyzing the data by age, one can identify certain patterns in the perception of various aspects of media literacy.
Young people aged 14-29 demonstrate a higher level of understanding of Uzbekistan's media landscape; about 70% of them know that there are both state and private media. At the same time, more than half of this group shares the opinion that state media are superior.
Middle-aged respondents (30-45yrs.) are most sure that the Internet is primarily used for entertainment (64%), as well as that threat of personal data leakage online is high (49%). They are also more likely than others to have concern about negative impact of publications on reputation (77%).
People over 45 years of age showed less awareness of information security issues. More than half of them share the opinion about superiority of state media. 21-35% in this group believe in online anonymity.

Table 3.7.10. *Do You Agree or Disagree with the Judgement (N=1018)*

	Percentage of those who agree by age				
	14-18, n=125	19-29, n=277	30-45, n=363	46-60, n=204	61-65, n=49
Newspapers, TV channels and Internet portals in Uzbekistan are both state-run and private	70%	76%	77%	75%	72%
Only the state-run media can make quality products	56%	56%	63%	67%	70%
Internet is primarily a source for entertainment and communication	55%	54%	64%	48%	41%
Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	49%	61%	61%	55%	48%
When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	43%	50%	49%	37%	32%
Internet allows you to keep anonymity - the user cannot be identified	37%	38%	40%	35%	21%
Some messages/information posted by a person online can negatively affect his/her career and private life	74%	70%	77%	66%	52%
It is sometimes permissible to give someone information about your passwords, code keys (at the bank, in the Internet, etc.)	25%	24%	20%	16%	12%

Assessment of Media Literacy Level

This section presents the results of the analysis of information obtained from respondents regarding their ability to analyze and interpret media information. Respondents were given a number of judgments with predetermined “competent” (correct) answers. Thus, as a result of analyzing the “competent” answers to the provided statements, as well as a comparative analysis between the data for 2021 and 2023, a number of trends can be identified.

According to the data, for the period from 2021 to 2023, the following trends with respect to changes in the level of media awareness of the Uzbek population can be noted:

- The share of respondents who gave a “competent” answer to the judgement that the media in Uzbekistan can be both state-owned and private decreased from 79% in 2021 to 75% in 2023. At the same time, the share of those who believe that not only state media can produce quality products increased from 24% to 33%.
- Slight increase is demonstrated by the indicator of realizing that the Internet is primarily not only an entertainment resource, but also a source of information - from 34% to 38%. There is also a noticeable decrease in the share of those who do not believe that mass media influence the thoughts and behavior of the audience - from 42% to 29%.
- As for the basics of information security, the situation is ambiguous: on the one hand, the share of those who understand the danger of passing passwords and codes to third parties has grown significantly (from 67% to 74%). On the other hand, the share of those who do not believe that the Internet allows to keep anonymity has decreased (from 51% to 47%), as well as those who believe that personal data is collected when using electronic means of communication (from 56% to 45%).

Thus, we can speak about the ambiguous and contradictory dynamics of the level of media awareness in Uzbekistan: along with certain progress in some aspects, there is a decline in other areas.

Table 3.7.10.1. *Assessment of Media Literacy Level (Quantitative Data on "Competent Answers")*

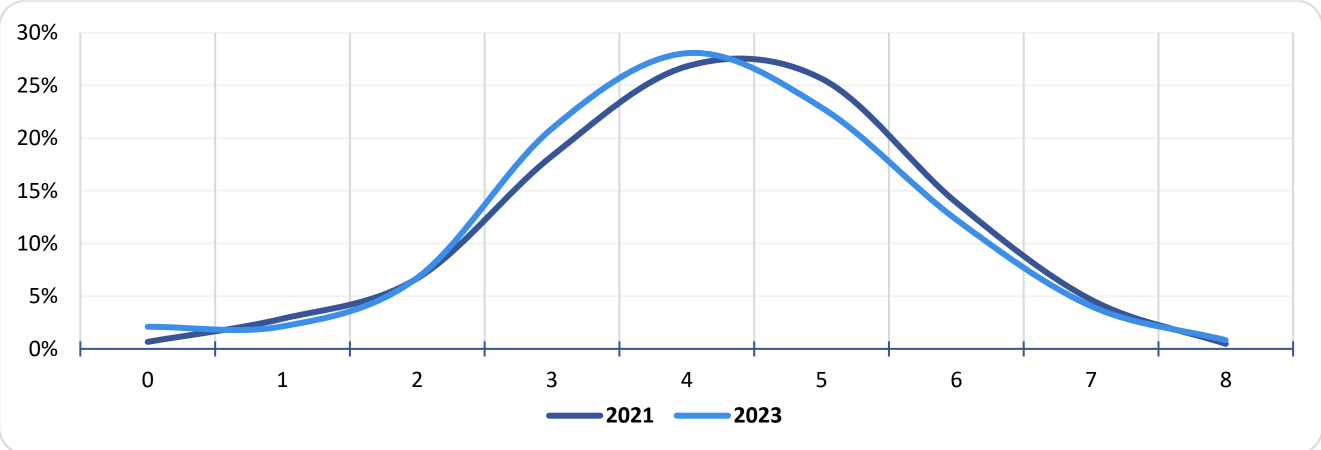
No.	Judgement:	"Competent" answer	2021	2023
1	Newspapers, TV channels and Internet portals in Uzbekistan are both state-run and private	*True*	79%	↓ **75%**
2	Only the state-run media can make quality products	*False*	24%	↑ **33%**
3	Internet is primarily a source for entertainment and communication	*False*	34%	↑ **38%**
4	Thoughts and behavior of a person are completely independent of the information he/she consumes in the media	*False*	42%	↓ **29%**
5	When using electronic means of communication (websites, social networks, etc.), personal data of users is always collected	*True*	56%	↓ **45%**
6	Internet allows you to keep anonymity - the user cannot be identified	*False*	51%	↓ **47%**
7	Some messages/information posted by a person online can negatively affect his/her career and private life	*True*	72%	= **72%**
8	It is sometimes permissible to give someone information about your passwords, code keys (at the bank, in the Internet, etc.)	*False*	67%	↑ **74%**

Since skills in understanding media functioning are one of the components of media literacy, a media literacy assessment index was created for each survey participant based on their individual responses. This index was formed based on judgment scores that reflect how "competent" respondents were in responding to the judgments provided.

As noted above, for each of the eight judgments, a "competent" response was predetermined, corresponding to a high level of media awareness. In case the respondent's opinion coincided with the "competent" answer, he/she was awarded 1 point. Thus, based on the number of coincidences with the "reference" answers, an index of the media literacy level of each respondent was calculated. The maximum possible number of points is 8 (with 100% coincidence with all "correct" answers), the minimum - 0 (no coincidence with "correct" answers).
So, the data analysis shows a slight decrease in the level of media awareness of the population of Uzbekistan. Over the period from 2021 to 2023, the share of respondents with an average level of media awareness (3 points) increased most noticeably, from 18% to 21%. At the same time, the share of respondents with higher scores (5-6 points) decreased from 40% to 35%. In general, the average score for Uzbekistan decreased slightly from 4.3 in 2021 to 4.1 in 2023. Thus, the data indicate some backslide towards average media awareness and decrease in the share of respondents with a high level of media awareness.

Countrywise average score:
2021 – 4,3
2023 – 4,1

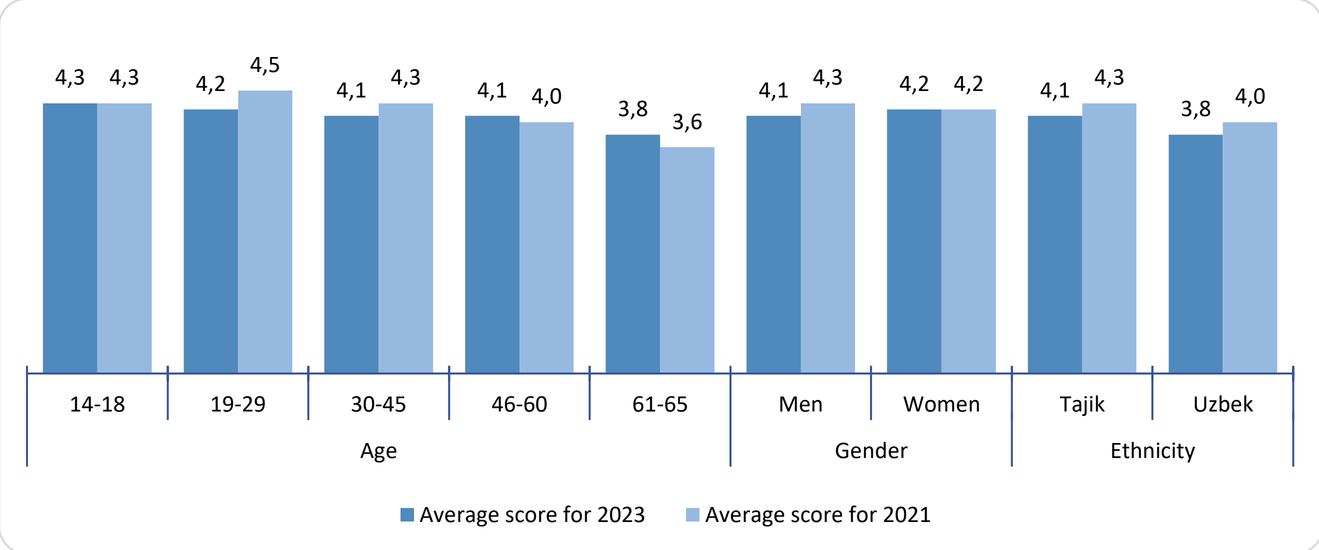
Diagram 3.7.10.5. *Distribution of Respondents by Media Literacy Index (Percentage Share in Terms of Index Value)*



Data by age groups, gender and ethnicity allow us to analyze the dynamics of media literacy of the population of Uzbekistan more thoroughly. It should be noted that even though the differences in the dynamics of indicators between groups are not so significant, these small changes nevertheless deserve attention and more detailed consideration:

- There is a slight decrease in the media awareness index in the age groups of 19-29 years old (from 4.5 to 4.2) and 30-45 years old (from 4.3 to 4.1). Among respondents aged 14-18, the index is stable (4.3 points). Meanwhile, there is a slight increase in the level of media awareness among respondents aged 46-60 (from 4 to 4.1) and those over 60 year olds (from 3.6 to 3.8).
- In terms of gender, the figures did not change significantly.
- -Ethnically, there is a decrease in the average score for both Uzbeks (from 4.3 to 4.1) and Tajiks (from 4 to 3.8).

Diagram 3.7.10.6. *Average Score of Respondents on Media Literacy Index by Age, Gender and Ethnicity*

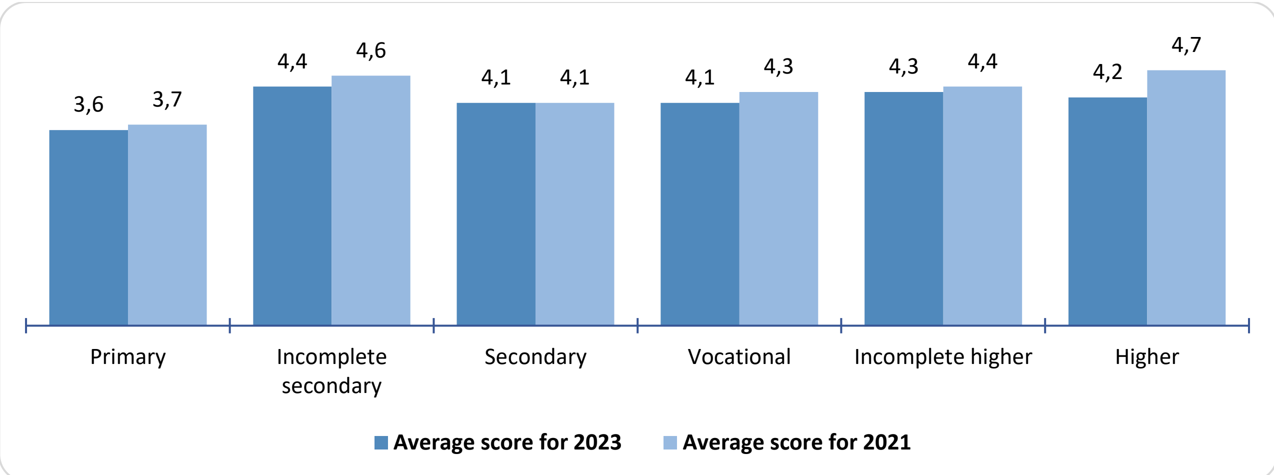


Analysis of the media literacy dynamics by educational groups shows the following:

- Almost in all educational groups there is a decrease in the average media literacy score in 2023 compared to 2021.
- The most significant decrease is seen in the group with higher education (from 4.7 to 4.2 points).
- Consistently low scores are demonstrated by the group of respondents with primary education (3.7 in 2021 and 3.6 in 2023).

Thus, the decline in the level of media awareness is peculiar to all educational groups, which requires a comprehensive approach to solving this issue at all levels of education.

Diagram 3.7.10.7. *Average Score of Respondents on Media Literacy Index by Education Level*

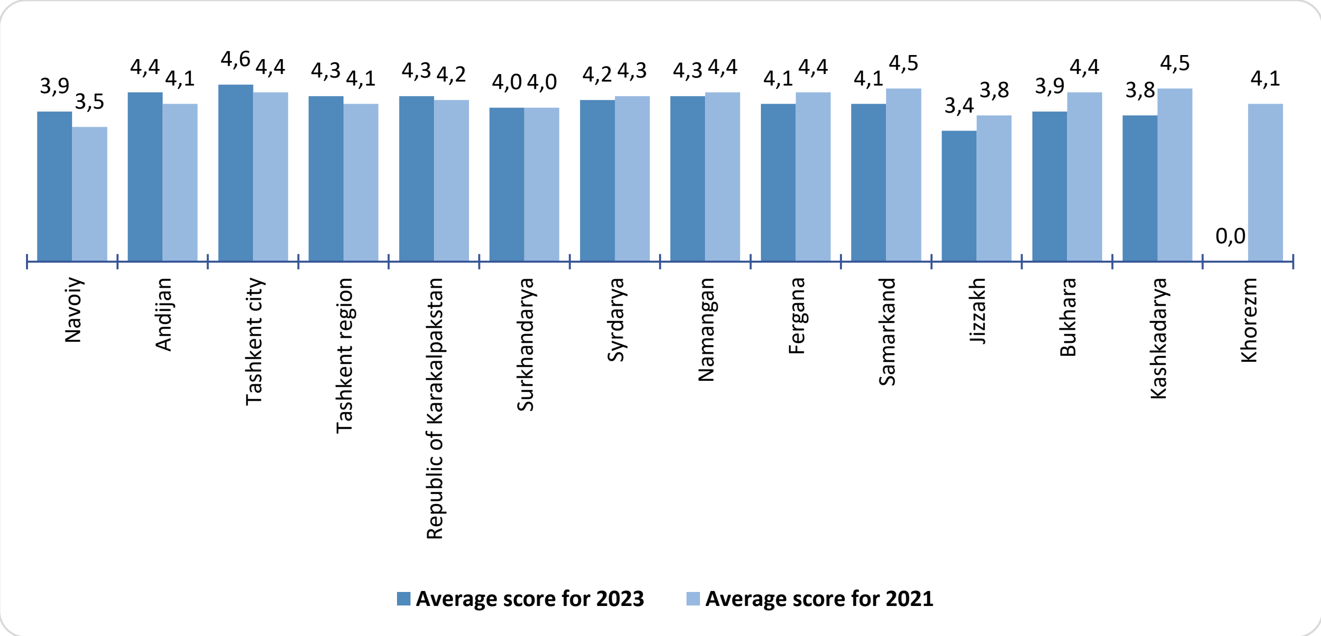


Analysis of the dynamics of media literacy level of the population by regions of Uzbekistan for the period 2021-2023 reveals the following trends:

- In most regions there is a decrease in the average score of media literacy in 2023 compared to 2021.

- The exceptions are Navoiy, Andijan and Tashkent regions, Tashkent city and the Republic of Karakalpakstan, where slight growth of the index is observed.
- Samarkand, Jizzakh, Bukhara and Kashkadarya Provinces showed the greatest decrease.
- In general, there is a significant dispersion of indicators by regions and their uneven dynamics.

Diagram 3.7.10.8. *Average Score of Respondents on Media Literacy Index by Regions*



Assessment of Media Literacy and Information Culture Level

Analyzing the data for 2023, it can be noted that the majority of respondents are still confident in their information search skills (70-74%) and in importance of diversity of sources (75%). At the same time, only half of the respondents (50%) trust traditional media.

Looking at the dynamics from 2019 to 2023, the following key trends can be seen:

- percentage of those who easily identify the advertising nature of information (from 46% to 37%) and analyze media positions is decreasing (from 35% to 20%).
- percentage of respondents who note the inconsistency of messages from different sources is increasing (from 57% to 68% in 2021).
- share of those who are used to trusting traditional media decreased from 63% to 50%.
- respondents are less likely to turn to friends and acquaintances for help in data search (from 49% to 42%).

Despite confidence in their skills, the audience's critical attitude towards the media is growing and trust in their objectivity is decreasing.

Table 3.7.11. *Do You Agree or Disagree with the Judgement (N=1018)*

Answer options:	Percentage of those who agree		
	2019	2021	2023
I can easily and quickly find any information I need	75%	72%	70%
Usually I know where (in what source) I can find the relevant information	69%	76%	74%
I often compare information from different sources to verify it	54%	48%	54%
I can easily determine what information contains advertising	46%	38%	37%
There are media (TV channels, newspapers, magazines, radio stations, etc.) that I trust and those I do not trust	63%	71%	61%
The media should report only the facts, and what these facts mean, everyone will decide for his/her own	79%	69%	69%
I think the more different sources of information, the better	84%	85%	75%
Information reports from different sources often contradict each other	57%	68%	54%
To assess the information from newspapers, magazines, TV, radio, etc., I try to find out whose interests this media represents, who is behind it	35%	22%	20%
Media should be responsible for poor quality information just as the producer is responsible for poor quality products/services	80%	84%	80%
I'm used to believing what the newspapers say, what they say on TV and radio	63%	66%	50%
I often ask relatives or acquaintances to find the information I need	49%	56%	42%
There have been instances where I have lost time or money due to incorrect information in the media	30%	32%	22%
I often experience fatigue from a loads of information	37%	41%	40%
Different media often repeat the same information, little different from each other	55%	74%	63%
I know how to arrange my social media feed to read only information that interests me	-	60%	56%
Having received a friend request in the social network from a stranger, I first check the profile, and then make a decision	-	55%	57%
When posting other people's content (information, pictures, videos, etc.) on social media it is necessary to give a link to the source	-	63%	49%

3.8. Qualitative Survey Results

3.8.1. Media Consumption

Experts note several important trends characterizing modern media consumption in Uzbekistan.

Firstly, one can see a rapid growth in the popularity of video content, especially on video hosting service *YouTube*. Video is increasingly replacing text as the main source of information for the population.

Secondly, leading positions in media consumption are occupied by social networks, primarily Telegram, where various information is actively spread. Social networks are successfully competing with traditional media for the audience's attention.

Thirdly, despite attempts of the government to control the Internet, the population is actively using tools for bypassing blocking (VPN) to get access to the necessary information.

Fourthly, there is a demand for reliable and credible information rather than propaganda.

"Uzbekistan has always been looking for truthful information, the most plausible and reliable information. I will try to organize and sort out the main sources of information in Uzbek society. The first one is YouTube. There is too much variety of information on YouTube. Today the main part of information is presented by video content. For example, Kun.uz, Ozodlik, BBC, etc. These sources produce mainly video information. There are at least more than 10 million registered Uzbek users on YouTube. The largest social network, in my opinion, is Telegram. Of course, Telegram does not have such a variety of video information as YouTube, but nevertheless it is a fixed element in communication options, that is why Telegram is well developed in Uzbekistan. From time to time, up-to-date information is blocked by the authorities. Then people look for this information using VPN. Recently Ozodlik made some content with respect to the second administration of the authorities. This content was blocked due to the use of copyrighted videos. On the one hand, Uzbeks were using VPN en masse. On the other hand, this video was already spread on Telegram. Within a week this video has already been watched by at least 4-5 million people. More than 3 million citizens of Uzbekistan watched it on YouTube".

"Our population mainly consumes information in social networks. These are Telegram, YouTube, Facebook, Instagram and Tik-Tok. Despite the fact that Tik-Tok is blocked, a large number of young people use this service. I think social networks have long won the competition with news sites, as an example I can mention one of the most popular sites, kun.uz. Earlier, when I cooperated with them, our articles on the site were read on average 200-300 thousand times, and now, for example, when we publish our material, it is read about 10-30 thousand times. It turns out that interest in websites has decreased by about a factor of 10".

Interest of the population in different types of content.

In recent years in Uzbekistan there has been a tendency towards greater social and political activity of people. This is especially noticeable in large cities such as Tashkent, Samarkand, and the Fergana Valley. Interests and needs in media content differ depending on age and region. Young people are more interested in education, migration, and science. Middle-aged people are more interested in social and political problems and ecology. Main media consumption languages in Uzbekistan are Uzbek (70%) and Russian (20%). Russian is read mainly in large cities, as it is a more open audience. Young people use Internet sources more, while the older generation prefers traditional media (newspapers and magazines).

"I suggest that there is some social activation in Uzbekistan. Till 2016 we had a kind of hibernation. We were very afraid to show our interest in social or political life of society. Since 2016, especially within the period of 2019-2020, the authorities have become more liberalized. Now being within Uzbekistan, it is possible to criticize. There is some red line relating to criticism borders, but nevertheless it is possible to discuss real problems. Regionally, of course, Tashkent is the most

politicized place, because it is the capital. Samarkand is also the largest region of Uzbekistan, as well as Fergana Valley. However, one can see now some gradual socialization going on everywhere in Uzbekistan".

"People are interested in getting something newsworthy, something exclusive. Look, everything depends on the target audience, age category, and region. You have also mentioned the consumption language. For example, for Tashkent residents it is important to have more informational materials, for example, where to find something, or where to buy, how much it costs, new opened places/restaurants/shops".

"According to my estimates, about 70% of our information is in Uzbek and probably 20% in Russian. There is also a small percentage of information in English and Karakalpak language. Thus, we can say that two main segments are Uzbek and Russian. One can say that the language determines, firstly, forms of information transmission, secondly, position of the authors of publications and degree of perception by the reader; for example mainly the residents of Tashkent and a number of other large cities read in Russian, and as a rule, the Russian-speaking reader is more open to information and less aggressive towards information analysis.

As for age, in my opinion, we have more young people on the Internet, and various issues are more popular among young people, mainly such as migration abroad, and very narrow topics related to science, education and so on. Middle-aged information consumers, according to my observations, discuss more social problems, politics, life, science, problems related to ecology, health care and so on. Since I focus more on the Internet use analysis, I can't say exactly about the older generation, because, as far as I understand, most of them use newspapers and magazines. I can't comment on consumption habits of the older generation, what topics they are interested in, etc."

Reduction of television role in favor of the Internet.

There is a generation of people who are used to television and continue to watch it. For them, it is convenient and requires no special efforts. The younger generation prefers the Internet, as you can find content that is interesting to you personally. However, content search on the Internet requires a lot of efforts. From time to time, the older generation go out to the internet and social networks, but generally gets information from television. Complete rejection of television is not expected in the near future. Even in developed countries, television still exists. Most likely, there will be a convergence of television and Internet resources. They will supplement each other.
The implication is that television will retain its position thanks to the older generation, but share of the Internet will grow thanks to young people. Both channels of information will coexist.

"I think – no, because there is a generation that is already used to television. First of all, it's convenient and doesn't require much effort. There's just a stream of information on television. It's not synchronous. It's asynchronous. That is, you turn on a TV channel, and everything is already going on there. While the Internet is other: you have to know what you are looking for. As for YouTube, it depends entirely on your preferences. For example, I've been using YouTube for a long time, because it's more convenient for me. I believe that the Internet is better for the younger generation. However, there is a generation that is already used to TV. They switch on TV from time to time, use YouTube and social media. But in most cases they prefer to get information on TV. In the near future I don't expect that it will change. Television is still existing everywhere, even in America and in Europe. Television becomes a social part or some kind of harmonious component of the Internet, YouTube, and social networks".

Language preferred in social networks and media.

The majority of the population of Uzbekistan prefers to consume media content in Uzbek, as not everyone has a good command of Russian. In large cities such as Tashkent and Samarkand, where there is a large bilingual population, people who speak Russian and Uzbek prefer the Russian language for media viewing. According to experts, the choice of language also depends on educational level, i.e. the higher it is, the higher the likelihood of preferring Russian-language content. Even those who do not speak Russian well can understand Russian speech and watch TV channels. The Russian-speaking population in large cities, especially Tashkent, is more critical of Russia`s policies.
Thus, the choice of language depends on the region, level of education and personal preferences. But in general, the Uzbek language prevails, though Russian is also widely used.

“We mostly prefer the Uzbek language, because most of the population of Uzbekistan is Uzbek, after all and not everyone speaks Russian well, and people in turn choose the easiest way. And as for bilinguals, even in Tashkent, Samarkand, who speak Uzbek and Russian well, they mostly prefer to use Russian and read in Russian. That is, if a person knows Russian and Uzbek, he/she usually prefers Russian”.

“I think it depends on education. Even if the majority of the Uzbek population can't speak Russian, they still can understand it. They just consume information with simple language, they don't have perfect knowledge of Russian. The situation is similar in the regions, I know it from my relatives and acquaintances. If you try to talk to them in Russian they do not know how to answer you. However, when they just turn on Russian TV channels and watch, then they do understand it. I would like also to mention that it is exactly the Russian-speaking part of the population in Tashkent that is more critical of Putin and the Kremlin. They are more critical of Putin, Kremlin, as well as current Russian regime”.

According to experts, residents of Uzbekistan prefer different sources of news and analytical programs depending on their needs.
To obtain official government information people most often watch the state TV channel *Uzbekistan 24*, which covers activities of authorities and the president. At the same time, TV channels like *Davr, Yoshlar Ozbekiston* are more oriented towards entertainment content and do not focus on serious items.
As for objective analysis and independent assessments, people prefer online resources such as *Kun.uz*, which invites independent experts and tries to avoid censorship.
In general, central TV channels, which have resources to create attractive content with participation of famous stars and expensive shows, are more popular. Local TV channels in the regions usually lack strong content (except for news) to compete with the central media.
Thus, Uzbek residents choose news sources depending on their information needs: official information on state TV channels, entertainment on commercial TV channels, and independent analysis on the Internet.

“For example, if you want to get official information you need to turn on Uzbekistan 24. There is analytics and information flow there. Let's say one can find there some information about a meeting or schedule of the president. Who he met with, how it was. The others TV channels we consider are Davr, Yoshlar or Uzbekiston. They give information, but not so detailed. Each TV channel has its own character. If you want an objective in-depth analysis, you have to take into account Kun.uz, our website. We invite experts and try to lower the level of censorship control as much as possible”.

“First of all, people watch central TV channels. The main interest of citizens is news, what is happening around in Uzbekistan and by regions; if there are powerful media outlets with many subscribers, people watch them as well. The situation with television is clear, people watch those who have quality content, who have more interesting content. Here again I can make a comparative analysis: there is a strong team of Tashkent television, which receives many billions of dollars of funding and they make some shows with the involvement of stars and at 8 p.m. this show is on this channel, they make prize drawing, there is some interesting performance, etc. Therefore, in other regions of Uzbekistan no one will watch local news, or some movie or program that will be broadcast on the TV channel at 8 p.m. There are a lot of questions here. Those TV channels who are well financed, who have a good, professional team, editorial team, director's team, cast and so on, they are strong and they will reach a wider audience. Well, I should say that on local channels I haven't seen any popular TV show for a long time, except for news releases”.

Top popular TV channels.

The popularity of TV channels in Uzbekistan is determined by a number of factors. Leaders of the rating are non-state entertainment channels. *Sevimli TV* is on the first place, followed by *Zor TV, Milliy TV* and *My5*. Their competitive advantage is bright emotional content - music and talk show programs, and a minimum of political news.
Russian TV channels are in the second place in terms of popularity. However, their availability is uneven across the regions of Uzbekistan. Thematic channels such as children's *Aqlvoy* and educational *Dunyo bo'ylab* are also in demand.
State TV channels, such as *Uzbekistan 24*, are second to entertainment channels in terms of emotional intensity and entertainment content, although they remain an important source of official information.

Thus, audience preferences in Uzbekistan are primarily given to interesting entertainment channels, while the state media perform more informational function.

"According to my data, non-state channels Zor TV, Milliy TV, Sevimli TV are in demand now. There is also TV channel My5 which, according to my inquiries and observations, is less popular than the abovementioned three TV channels. As for foreign TV channels, we don't have them, but I think Russian channels are on the second place again. It is difficult for me to suggest which channels exactly, because in Tashkent there is a very large choice of Russian channels, but such choice is not available everywhere, For example, some channels that are popular in Tashkent may not be popular in the Republic as a whole.

Sevimli TV, Zor TV, Milliy TV, Dunyo Bo`ylab and the children's channel Aqlvoy have a wide audience".

"In fact, Uzbeks primarily watch Sevimli TV, it occupies the first place in terms of audience size, as far as I know. Zor TV comes second, My5 is in third place.

They have very powerful entertainment content, less politics, more emotional, good music. They also have a lot of talk shows, analysis, their information content is good. But they broadcast more brightly than Uzbekistan 24".

Foreign media to be reduced or increased in Uzbekistan

According to experts, Uzbekistan needs to strengthen its independent and competitive information field, relying primarily on national media. As the expert rightly remains, the country's leading TV channels, such as *Channel One, Yoshlar* and *Uzbekistan 24*, have so far avoided covering important world events such as the war in Ukraine. This may be due to the authorities' fear of touching on hard-hitting and contentious topics. However, the situation is gradually changing - a number of independent media outlets such as *Qalampir, Kun.uz* and *Azon* are already raising these issues in their publications and programs. This is a positive sign of the development of freedom of speech in the country. Nevertheless, in order to truly strengthen Uzbekistan's information presence, emphasis should be placed on improving the quality and influence of the national media by giving them greater autonomy and professionalism. This is the only way to ensure that the Uzbek point of view is conveyed both inside and outside the country.

«Uzbekistan must have its own independent genuine competitive information field. As for Channel One, Yoshlar, Uzbekistan 24, there are no words or information regarding the war in Ukraine at all. It's been almost a year and a half. So it is a kind of fear, the authorities are very afraid to touch this subject. They were in despair for the first three months, then three months later they allowed independent media to cover it. For example, Qalampir, Kun.Uz, Azon – they discuss these issues now. However, the first Uzbek official TV channel still does not report on this subject, until now. So I am in favor of strengthening our channels".

Experts suggest a balanced approach to Uzbekistan's policy towards the Russian media. On the one hand, given the country's geopolitical position, supporting the Russian media presence has a rational justification. However, as it was rightly pointed out above, it leads to excessive influence of the Russian agenda and sometimes even obvious propaganda.

At the same time, a sharp break with the Russian media is also undesirable - it may have negative political consequences. In this regard, it is suggested to maintain a truly neutral and balanced position, which would allow preserve constructive relations with Russia without losing independence.

To strengthen the national information field, experts recommend developing the Uzbek media, primarily television. This will require a gradual softening of censorship rules and introduction of greater plurality of opinions when covering important domestic and foreign policy issues. Such liberalization may contribute to the growth of critical thinking in society, which will require increasing the efficiency of the state machine in responding to citizens' demands.

Thus, a well-thought balance between national and foreign media, gradual liberalization of the media environment while strengthening state institutions is a reasonable development path for Uzbekistan, as experts recommend.

"I think, in general, given our capabilities and geopolitics, it's actually not bad that Russian media is supported here. However, in fact we see a close contact between the countries, that is, even our neighbors have a lot of Russian influence. I would like the state of Uzbekistan to have a neutral attitude towards Russia not only on paper, but also in fact".

"After all, we should get rid of censorship. Why do TV channels have so much influence? Because only TV channels have a general coverage of all republican news. All Uzbek TV channels. There is Yoshlar, Madaniyat va Marifat, Tarix, Uzbekistan 24. All Uzbek TV channels reach about 95% of the population of Uzbekistan. But there are no vigorous debates there. One can also see strict censorship relating to geopolitical issues. If we look at European countries or Russia, there is a lot of discussions on their TV channels. There are a lot of information battles there. If we have something similar in our country, the population will more often watch TV. But the authorities are afraid, because free information is followed by critical thinking. Therefore, if there is no censorship, people will have a more critical attitude, more open relationship with authorities. This means that the state must have a very developed bureaucracy, so that our bureaucracy can understand the demands of the population and offer solutions to social issues of the society".

Internet penetration within the country.

Internet coverage is high – 31 million people or about 80% of the population. However, there are problems with its quality. Internet prices are assessed as not overestimated and more stable compared to the past. They are lower than in some developed countries, but higher than in the neighboring countries (Kyrgyzstan, Kazakhstan).
Internet quality is higher in large cities than in remote areas. It is often only limited access to social networks and messengers there. Mobile Internet costs are still quite expensive for the population.
To expand the Internet audience, it is necessary to reduce prices and improve quality, especially in the regions. This will allow more people to use all the possibilities of the Internet.

"As for prices, I would not say that they are too expensive, for example, abroad, our neighbors have higher Internet services costs. We travel around the regions and visit other countries, it should be said that our Internet costs are cheaper, however, our salaries are much lower, so it all depends on the family budget for each case".

"If the prices are lower, that is, the average, then naturally there will be more consumers, more Internet users, the audience will increase. If Internet costs are more expensive, then, therefore, the audience will decrease, so it is interdependent".

"There are 31 million Internet users in Uzbekistan. It is about 80% of the population of Uzbekistan. The figures are high, but I have already said several times that we do not have high-quality Internet everywhere. So not all people have a good Internet access, with about 1 million people using all the opportunities of the Internet. In particular, in many peripheral areas where I have been, the Internet is mostly used in a limited way, for example, Telegram channels, social networks and so on. Wi-Fi and good Internet providers are not available everywhere, although we have high level of Internet penetration, I think the quality of the Internet is still poor".

"I think that Internet service costs are not so high in Uzbekistan. Earlier they were higher and seemed to be overestimated, but now they are more stable and affordable. Of course there are many countries where the Internet is much cheaper than in our country, but in my experience you have to pay a lot for Internet services in many developed countries. Thus, I believe that prices for Internet services in general are not bad. It is worth noting that Wi-Fi connection is better than mobile Internet which is still expensive, more expensive than in Kyrgyzstan and Kazakhstan".

Willingness to pay for interesting author's content.

In big cities of Uzbekistan (Tashkent, Samarkand, Navoiy, Fergana), there is already an audience which is ready to pay for content: television, video streaming services, and e-books.
There are the first experiments of bloggers and media on paid subscription, which showed that a small audience (hundreds of people) is ready to pay for access to information.
Users will pay for very interesting and unique content, primarily sports and political content. But in general, the audience willing to pay for content is still small.

We need to conduct further experiments with paid content to identify audience segments willing to pay and types of content in demand. As solvent demand develops, the audience of paid subscribers will grow.

“Let's say that many people, at least in Tashkent, Samarkand, Navoiy, Fergana, pay for television, Internet TV, ID TV and they pay approximately 15-20 thousand soms per month and have 70 TV channels. It is a symbolic amount, but nevertheless they pay. Now cinemas and paid video platforms are popular, where you can watch new movies, TV series; it means there is an audience in the urban environment which is willing to pay for the content. And another example is Asahii, it launches the production and people pay for books, i.e. they do not wait for PDF-format (soft cover) to appear, but buy them immediately. And finally, journalist bloggers have long been discussing the creation of some channels, websites with paid subscriptions, but no one does it, they are afraid that no one will pay for it. However, recently three of our colleagues have tried to do it and they have succeeded in some issues. Of course, it is not yet the result, but at least a few hundred people donated, paid for access to information. So, experiments are going on and some small audience is already there”.

“If it's going to be very interesting content or very interesting video, then a certain number of users, but not a lot, will pay for it. So, there will be interest, but it will be with a small audience. If we talk about sports broadcasting, then of course people will pay more; if it is something related to politics, for example, I have witnessed such a situation when 20, 30, and 50 million Internet users were gathered in a few hours as part of a contest or a campaign”.

Top 5 Products for Which Users are Willing to Pay.

Based on the provided expert opinions, the following top products and services for which users in Uzbekistan are willing to pay can be identified:

Analytics and expert assessments on topical political and social topics. Quality sports content such as match games broadcasts, news, analytics, sports betting. Video content on YouTube, for example, creative and quality videos, travel blogs, podcasts, E-books; movies and TV series; online courses and trainings, online consultations of lawyers in online mode. Reference services for goods and services - where to buy something, what to choose or the best offers.

It can be said that generally users are willing to pay for unique content, expert evaluations, entertainment and useful practical information. The greatest interest is in sports, online education, and legal advice.

“Analytics – yes, because we have an informational voice in Uzbekistan, I should admit, as a political scientist, I even get tired of it. People ask so many questions on Telegram, Facebook, so many people take offense”.

“First of all is sports content, secondly is qualitative content on YouTube. These should be some videos and the main requirement is that they should be qualitative and creative; it can be travel blogs or podcasts. Thirdly, in my opinion, are books, the fourth place is occupied by movies and TV series, and on the fifth place are courses and trainings”.

“It is sports, athletes, sports betting and etc., though they still have some nuances, but they do have many alternatives in the sports sector.

This is also legal sector, law enforcement information, on an on-going basis, online advocacy. Online advocacy is used to send questions or inquires for consultations. In order to get that done, one should send some amount of money over text messages and in 15-20 minutes you will get a consultation. One more point is some kind of service in consumer sector, i.e. where to go, where it is cheaper to buy goods or services, where to eat, what to buy, from whom to buy, something like that, such a help desk, so to say”.

Uzbeks` Trust in Mass Media

Based on the provided opinions of experts, the following analysis can be made relating to trust in information channels and top social networks in Uzbekistan:

Everyone trusts official sources (state media). Independent experts and lawyers in social networks are also highly trusted. Among foreign media, the most credible are unsympathetic channels like *Ozodlik, BBC, Voice of America*, which provide a lot of negative information about authorities. However, according to experts, they are not always objective.

The majority of the population still trusts television and newspapers, especially in the regions. Young people in big cities are oriented more towards social networks and authoritative independent media like *Gazeta.uz*. Top 5 social networks: Telegram, Facebook, Odnoklassniki, Instagram, Tik-Tok.

Thus, credible leaders are both official and dissident media. Social networks also play a major role in informing the population.

"Official channels are trusted by everyone, without exceptions. Here, I can mention Channel of Lawyer Khushnudbek Khudayberdiev – Khushnud, and Davletov.uz, this is legal information "Rasmiy Khabarlar" - official news".

"I collect information from different sources. Then I do some kind of synthesis and analysis. The overwhelming majority of respondents in Uzbekistan like all kinds of critical information. Ozodlik comes first, followed by BBC, then Voice of America. These are the sources where one can find critical information, i.e. where they criticize the authorities; people think that this information is reliable, but in fact it is not. There is credible and reliable information there, but it is not always so, while Ozodlik and/or BBC have their own tasks".

"I think verbal communication plays a big role as well, a lot of people trust their friends. Probably, I suppose, if we analyze on the whole within the country, a large percentage of the population trusts television and print media. As for big cities and young people, they probably trust more, first of all, social networks, secondly, some authoritative publications and platforms. These can be publications in Gazeta.Uz or official channels of government agencies.

I think the top 5 include Telegram, Facebook, Odnoklassniki, Instagram and Tik-Tok".

Credibility to domestic/foreign/private media.

The study shows that credibility of the Uzbek population to information sources depends largely upon political preferences.

Most citizens trust the official media inside the country, such as state TV channels and popular news websites. Among foreign media, Russian state media are the most authoritative in the opinion of many people and are considered to be more objective.

At the same time, a part of the population with liberal and opposition views prefers independent and unsympathetic international media like *BBC, Euronews, Ozodlik*. They trust neither official domestic information nor Russian state media.

Thus, the level of credibility is closely related to the degree of loyalty of a media outlet to Uzbek and Russian authorities. The higher the level of criticism, the more trust on the part of the opposition-minded part of the society.

"There again, people trust the information that they read in official sources, usually on television, from resources, government agencies, as well as various Internet sites that are already popular, well, let's say, for example, Kun.uz. Many people trust this website, there are such sites. As for foreign media, I think that we follow Russian media more, only a small part of the audience follows the media of other countries, and usually credibility to Russian channels is very high, both TV channel and websites. Sometimes, it depends on the real professionalism of Russian media, and sometimes on their public image. People believe that our journalists try to report on some burning issues, but our government suppresses the truth, while Russian media report the whole truth".

"Let's say we have a Russian-speaking part of the population. For them the most plausible information is on Russian TV channels. They trust Putin, they trust the Kremlin. What people say in Russia, what is under the Kremlin's control, is sacred to them. We also have liberals in Uzbekistan. They trust neither the authorities nor the Russian media. Most of all they watch Euro News and BBC. We also have an opposition population groups that are very critical of the authorities. Such people prefer watching primarily Ozodlik, etc."

In recent years, there has been a trend of decreasing public trust in traditional media in Uzbekistan.

In 2016-2020, the level of trust was higher, people focused on national media like *Kun.uz.* However, recently, credibility has been falling due to increased censorship. Citizens more frequently use independent foreign media such as *Ozodlik* and *BBC*. Interest and trust in state TV channels, which do not offer new formats and critical materials, is also declining. Credibility to online media outlets and bloggers dealing with political topics is declining due to censorship and harassment of journalists.
At the same time, anonymous publics in social networks grow in popularity as sources of alternative information. Thus, the general trend shows decreased credibility to traditional media and growing interest in anonymous and foreign sources.

"I think that level of credibility to TV channels and information in 2016-2020 years was higher than today. Over the last two or three years a critical thinking and distrust are growing, because censorship rules are getting stricter.

For example, in 2016-2020 people were more oriented towards Kun.uz and our channels. Now again, Ozodlik and BBC have more influence on the audience."

"Interest is decreasing, because there is nothing new, for example, studios or new formats. I have already mentioned that they have vast resources, but for some reason they do not use them. Well, I do not know, maybe everything is already set, I do not know. They don't have that kind of, you know, enthusiasm, like correspondents of other private TV channels, I mean information coverage. It is also decreasing. So, I mean here only informational aspects".

"Unfortunately I don't have exact information, but I have some suggestions from what I've been following, monitoring social networks and media. Thus, I have got the impression that trust in online media outlets, bloggers who cover public and political life is decreasing gradually, while credibility to all kinds of anonymous groups on Facebook, Odnoklassniki, VKontakte and etc. is growing, that is again my experiences for the last six months. There is such a point that censorship is getting gradually stricter and stricter; over the last year a large number of bloggers and journalists either went to jail or were fined, and with due regard hereto there is less criticism of popular channels and websites. Therefore the audience began to trust more some informal sources, let's say, citizen journalism".

In recent years, there have been fluctuations of level of censorship in the Uzbek media, which affects the objectivity of coverage.

A few years ago, Uzbekistan media reached a high level of proficiency. However, when Karimov was in power, censorship was stricter and the media were under absolute control of the authorities. In 2020-2021, censorship was softened. However, since 2022, amid growing massive protests, it has been tightened again.

Even independent media have to observe certain limits and avoid some topics. The authorities ae scared that criticism in the media could lead to mass protests. Thus, completely uncensored coverage is still limited. However, there are online media outlets that maintain professionalism.

"Approximately 7-8 years ago Uzbek media reached a high level of proficiency, but, unfortunately, over the last two years they have not grown. In general, the quality has probably decreased but there are still a few media outlets and bloggers who maintain a good level".

"Uzbekistan is a centralized state. In the Islam Karimov years, we lived in harsh dictatorship. No a single bird could twitter without permission from the central government. Your questions are just a bit funny. In Uzbekistan, I do not talk now about Kun.uz, but from time to time there are issues that we cannot discuss in any way, even in social networks, we cannot publish some information on Facebook about it. Say nothing of Kun.uz or Qalampir. So there has always been censorship in Uzbekistan, but in the 2020s it was not so strict. Onward 2020, especially in 2022-2023 the censorship has greatly increased. Amid Kara-Kalpak and energy crisis last winter, people in Tashkent, Fergana Valley and other big cities were ready to take to the streets because the heating facilities were not working. The authorities were really scared because of this. This is a

real problem. So when you give someone a freedom of speech, it's not only the will, I would say. Let's say if you are in power and you let people talk about their problems, like insufficient gas, electricity or just technical problems, and people talk about it calmly all the long, the next day million protesters can be out on the streets. This has already happened several times in the post-Soviet space, so it's not only a matter of political will, it's a matter of survival or stability in the state".

3.9. Main Conclusions

Based on the quantitative and qualitative data obtained, the following conclusions can be drawn:

- There is a general trend towards the shift from television to online sources, primarily social networks, as well as declining importance of traditional media.

- Older people are more likely to watch TV programs. The age of 30-45 years old can be considered some kind of border. Radio and print media play a secondary role.

- The highest activity is seen in making everyday family and entertainment content.

- Age affects the thematic preferences of user video content, namely entertainment is popular among young people, while more serious content is consumed more by adults.

- There is a steady tendency for the Uzbek language to prevail when consuming information from various sources. This is explained by the peculiarities of the language situation in Uzbekistan. At the same time, there is also a significant share of bilingual information consumption.

- One can see a tendency towards predominance of the Uzbek language, more pronounced among women, although with some decline over the last two years.

- Over the past two years, the position of national Uzbek media has strengthened and interest in foreign media has grown amid decline in the influence of Russian sources and traditional channels.

- In general, there is a stable dominance of national Uzbek sources when reading newspapers and magazines.

- Foreign TV channels along with Russian are not so popular among Uzbek audience and are significantly inferior to national channels. Only a few brands have a small reach.

- Over a space of three years one can observe refocusing of preferences from TV series content to national news, sports, entertainment and educational programs.

- Over the past two years, credibility of citizens to traditional media - television and print press - has significantly decreased in Uzbekistan. People have become more critical of information from official sources.

- Over the past two years, citizens' concerns about propaganda and fakes in the media space have greatly increased; new threats such as Internet fraud have emerged. This calls for intensified efforts to improve the media literacy of the population.

- More and more people take a critical approach to the media and seek a more objective picture.

- Over the past three years, the audience's distrust in objectivity and reliability of information in the media has grown. An increasing number of people feel the manipulative influence of the media.

- There is a growing strive of the audience for critical evaluation of information in the media and search for alternative data, mainly on the Internet.

- Over the past three years, the audience's activity in interacting with media teams has significantly decreased. The vast majority of people do not turn to the media to verify information or solve some issues. This may indicate a decline in credibility to traditional media and search for alternative sources of information.

- Most users lack basic knowledge and skills to protect their personal data online from theft and unauthorized use. This points to the need to increase the level of media literacy with respect to digital security issues.

- The older the respondents are, the less they are concerned about the technical aspects of the Internet and the higher their trust in the online environment. Therefore, it is necessary to increase media literacy among older generations.

- Critical perception of media space and awareness of the risks of the information environment decreases with the age. This requires strengthening media literacy in older age groups.

4. CROSS-COUNTRY ANALYSIS OF SOCIOLOGICAL SURVEY RESULTS

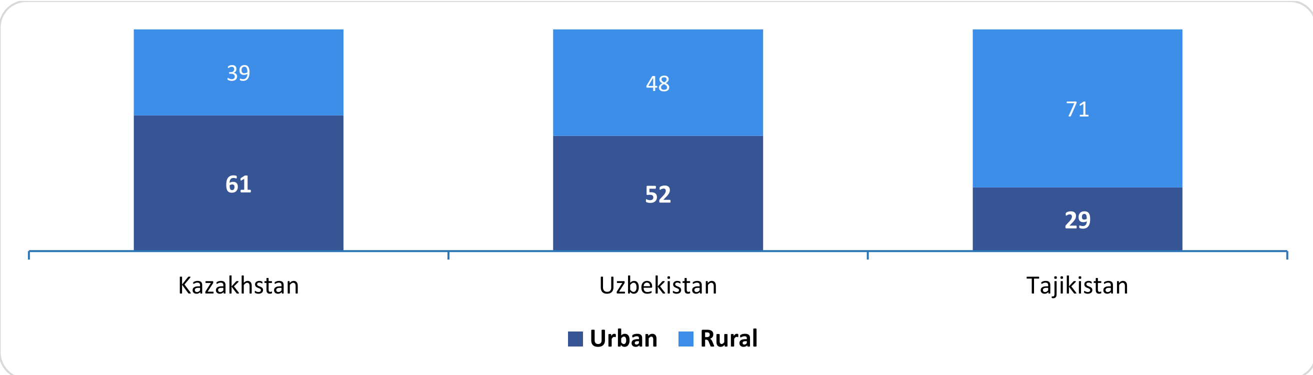
4.1. Comparative Portrait of Central Asian Citizens

Discussing the results of the research, it is necessary to focus on the cross-country analysis in order to identify commonalities and differences observed among the countries under review in the context of media literacy and media consumption.

It should be emphasized that the study was conducted for each region in all three countries and reflects distribution of the population according to the general population of each country.

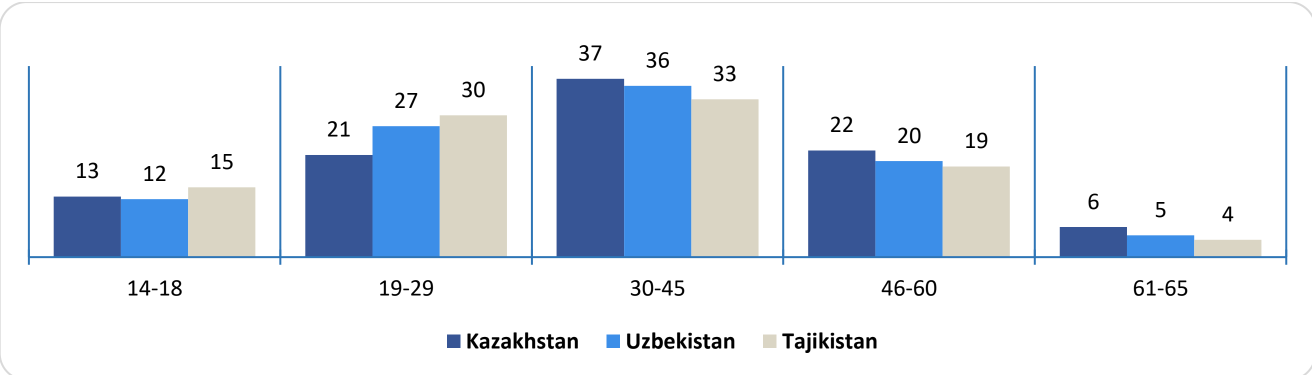
The distribution of respondents by type of settlement shows that, Kazakhstan is the most urbanized of the three countries under consideration, with an urban population share of 61%. In Tajikistan, on the contrary, the rural population predominates with a share of 71%. Uzbekistan occupies an intermediate position, where urban and rural populations are represented in approximately equal proportions - 52% and 48%, respectively.

Diagram 4.1.1. *Urban-Rural Differential Ratio by Countries (in percentage points)*



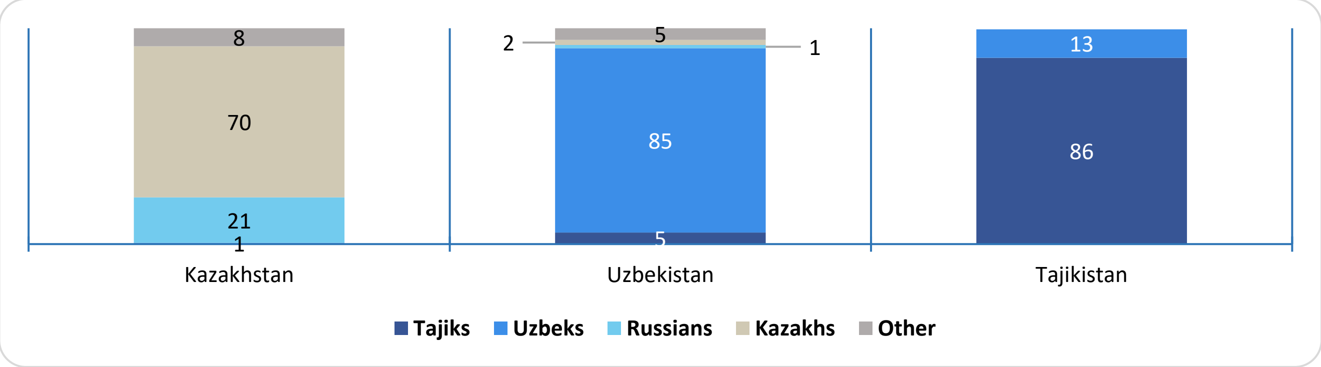
Age pattern of the population of the three Central Asian countries has both common features and differences due to the demographic situation in each country. In particular, Tajikistan has a relatively high proportion of young people under 29 years of age, which may indicate a higher birth rate compared to the neighboring countries. In contrast, Kazakhstan has a slightly higher proportion of persons belonging to older age groups. At the same time, the largest group in all three countries is aged 30-45 (33-37%), reflecting the predominance of able-bodied adults.

Diagram 4.1.2. *Age Distribution of Respondents by Countries (in percentage points)*



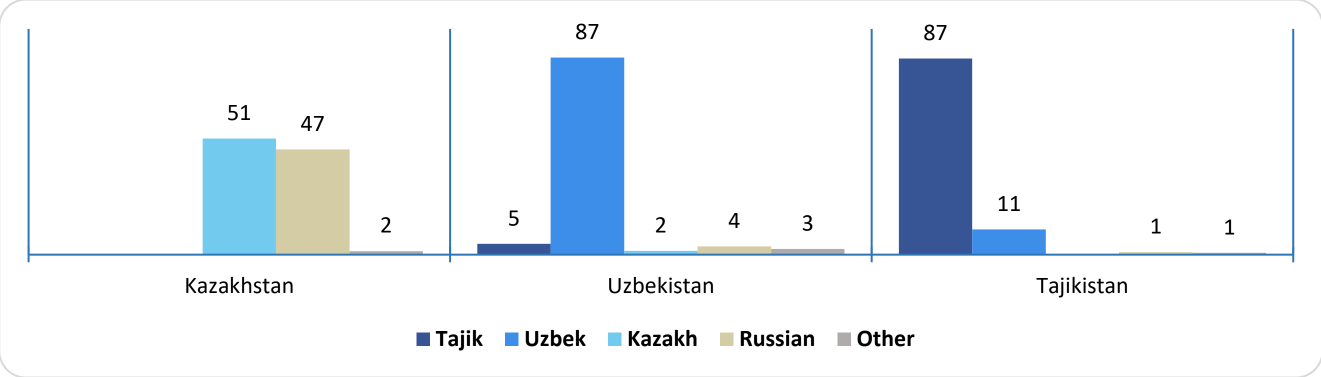
Ethnic composition of the sample in each country is generally representative of the ethnic structure of the population, with the titular nation predominating in each country - Kazakhs in Kazakhstan, Uzbeks in Uzbekistan and Tajiks in Tajikistan. However, at the same time, Kazakhstan demonstrates the least homogeneous national composition of the population. Along with 70% of Kazakhs, there is a significant share of Russians - 21%, as well as representatives of other ethnic groups - 8%. The dominance of the titular nation in Uzbekistan and Tajikistan is more overwhelming: Uzbeks account for 85% of respondents and Tajiks for 86%. Thus, Kazakhstan is represented in the study as the most multinational state.

Diagram 4.1.3. Ethnic Composition of Respondents (in percentage points)



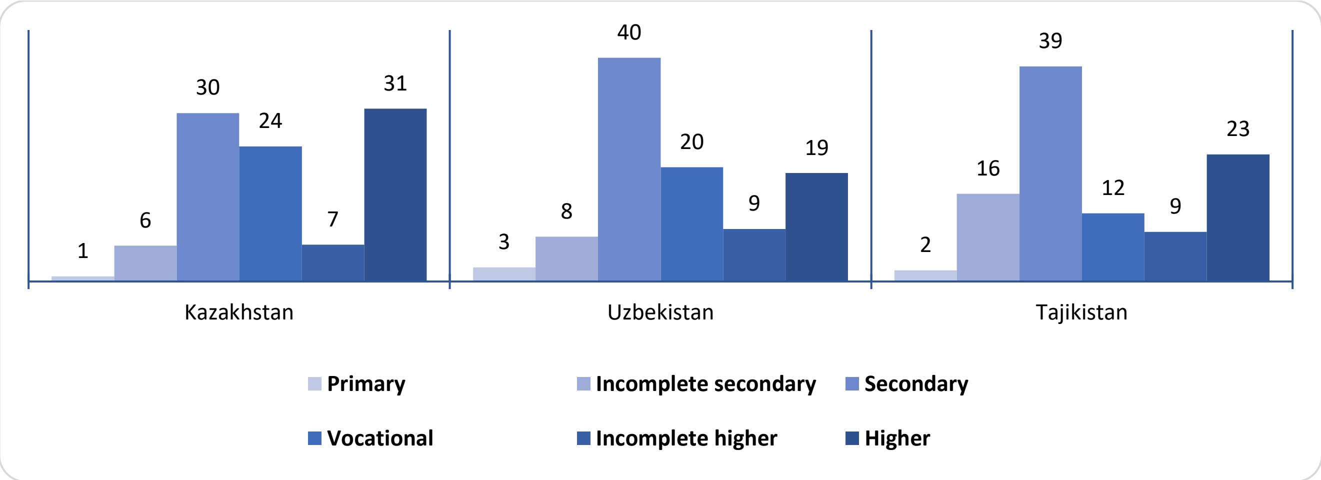
Language preferences in the home environment in each of the countries under review reflect the ethnic composition of the population. For example, Tajikistan and Uzbekistan are dominated by a more stable linguistic homogeneity corresponding to their titular nations, namely Tajik (87%) and Uzbek (87%) respectively. Kazakhstan stands out for its greater heterogeneity in the linguistic sphere: Kazakh (51%) and Russian (47%) are used in roughly equal proportions among respondents. This indicates the bilingual nature of the country, where two languages remain important in everyday life and communication.

Diagram 4.1.4. Languages Used (in percentage points)



Distribution of respondents by educational level demonstrates quite high figures in the education sector of the countries under review. At the same time, one can see some differences between the countries. In particular, Kazakhstan has the highest proportion of the population with higher education - 31%, while Uzbekistan and Tajikistan have a higher proportion of respondents with secondary education - 40% and 39%, respectively. In the meantime, the share of people with primary or incomplete secondary education in all three countries is low.

Diagram 4.1.5. Educational Level (in percentage points)



The study identified three levels of material well-being:

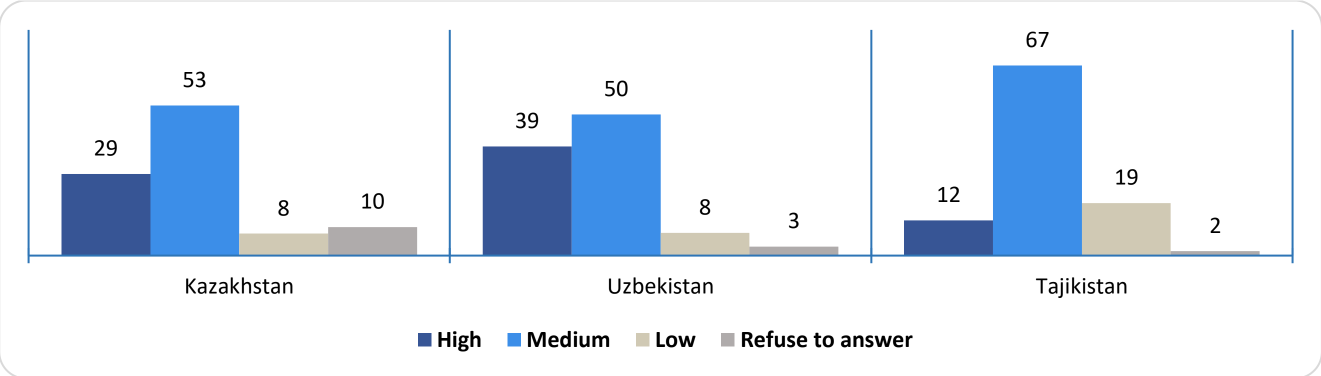
- ***High**:*
  – *We do not have any financial difficulties. If necessary, we can buy an apartment or a house.*
  – *We have enough money for everything (expensive clothing, car, etc.), except for expensive purchases such as an apartment or a country house.*
- ***Medium**:*
  – *We can by the necessary household appliances but we can`t afford to buy a car.*
  – *We have enough to buy food and clothing but it will be difficult for us to buy a TV, refrigerator or washing machine.*
- ***Low**:*
  – *We have enough money to buy food but to buy clothes for us is a serious problem.*
  – *We do not always have enough money even for food.*

Analyzing the level of material well-being of the population of the three countries, we can note both general trends and significant differences:

- Firstly, in all three countries the bulk of the population classifies itself as a middle-income class - from 50% in Uzbekistan to 67% in Tajikistan.
- Secondly, the highest indicators of living standards are seen in Uzbekistan, where 39% of respondents assess their well-being as high.
- Thirdly, the highest proportion of poor people is observed in Tajikistan - 19%. For comparison, in Kazakhstan and Uzbekistan this indicator is 8%. It should be mentioned that only 12% of respondents in Tajikistan have a high level of wealth.

Thus, Uzbekistan is the leader in terms of living standards, while Tajikistan is in a more difficult situation.

***Diagram 4.1.6.** Level of Material Well-Being (in percentage points)*



Analyzing the sector of employment of the employed population of the three countries, it can be noted that public service remains one of the most important spheres of activity in each of the countries. At the same time, there are some differences in the employment structure among the countries. In particular, in Kazakhstan, along with civil service (19%), the leading spheres are trade (20%) and services (16%). In Uzbekistan one can see that along with the public sector (24%), medicine and education (21%) and services (17%) dominate. In Tajikistan, medicine and education (29%) dominate together with the civil service (29%).

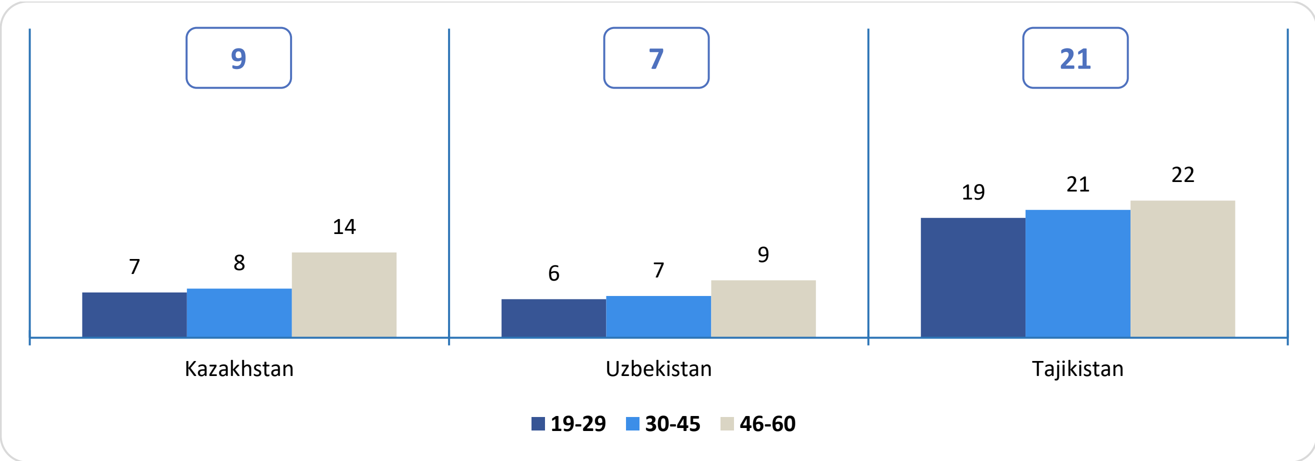
***Table 4.1.1.** Employment Sector*

	Kazakhstan	Uzbekistan	Tajikistan
Public service	19%	24%	29%
Industrial production (plants, factories)	8%	7%	3%
Medicine, education, science, culture	6%	21%	29%
Trade	20%	14%	10%
Transport and communications	8%	1%	2%
Service sector	16%	17%	5%
Construction sector	8%	6%	8%
Resources industry	1%	0%	0%
Energy industries	1%	1%	0%

Structures of Ministry of Internal Affairs, National Security Committee, national defense forces, etc.	0%	1%	0%
Financial sector (banks, insurance, etc.)	2%	1%	1%
Farming sector	4%	7%	7%
Mass media, advertising	0%	0%	0%
Social sector	1%	1%	1%
IT	1%	0%	0%

Analyzing the unemployment rate among the able-bodied population of the three countries, the most difficult situation is in Tajikistan. In particular, overall unemployment in Tajikistan is 21%, while in Kazakhstan it is 9% and in Uzbekistan is 7%. At the same time, the highest unemployment rate in all countries is observed among people of pre-retirement age (46-60yrs.), especially in Tajikistan - 22%. The figures are also high among young people aged 19-29 in Tajikistan - 19%, while in Kazakhstan and Uzbekistan it accounts for 7% and 6%, respectively. Thus, Tajikistan experiences the most acute problems in employment sector.

Diagram 4.1.7. *Unemployment Rate Among Able-Bodied Population Aged 18-60 Years (in percentage points)*

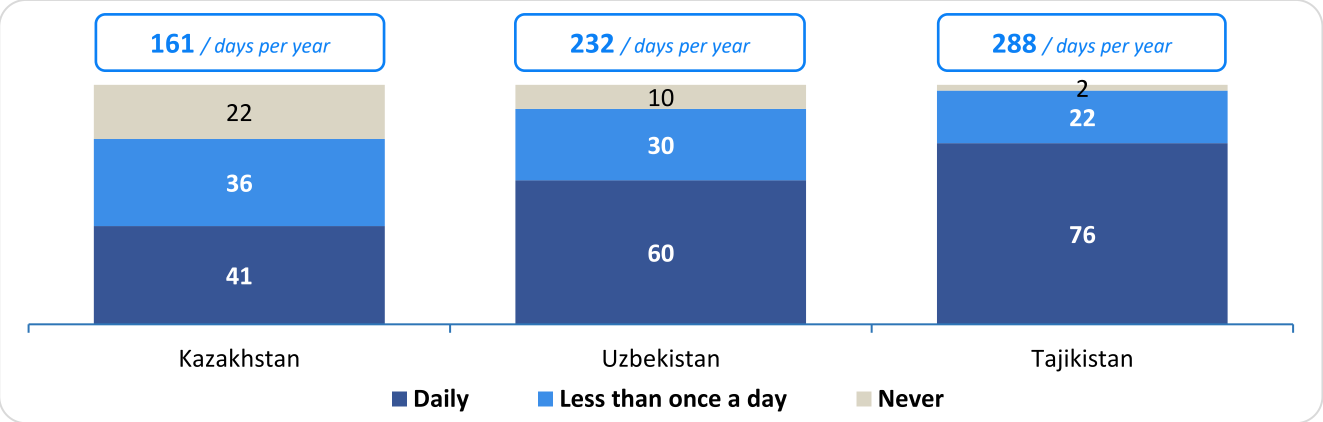


4.2. TV Consumption Comparison

4.2.1. Frequency of TV Consumption

Having analyzed the frequency of TV consumption one can see that there are marked differences in the level of TV viewing among the three countries. In particular, Tajikistan has the most intensive consumption of TV content: 76% of respondents watch TV daily; the average number of days of TV viewing per year is 288. In Uzbekistan, 60% of the audience also watch TV daily, with an average of 232 days per year. In Kazakhstan, TV viewing rates are noticeably lower: 41% of respondents watch TV every day, with an average of 161 days per year. Moreover, Kazakhstan has a relatively high proportion of those who do not watch TV - 22%. Consequently, Tajikistan is the leader in terms of frequency of TV consumption, followed by Uzbekistan, while Kazakhstan demonstrates a lower level of audience's interest in TV.

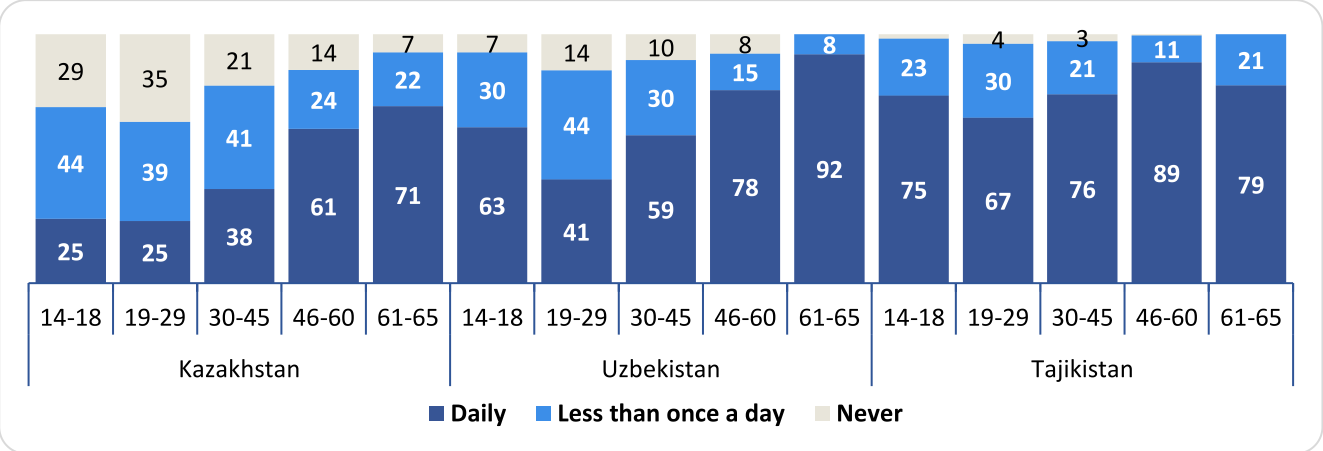
Diagram 4.2.1.1. *Ratio of TV Viewing Frequency by Countries (in percentage points)*



Analyzing the data on frequency of TV viewing in different age groups in the three countries, the following trends can be identified:

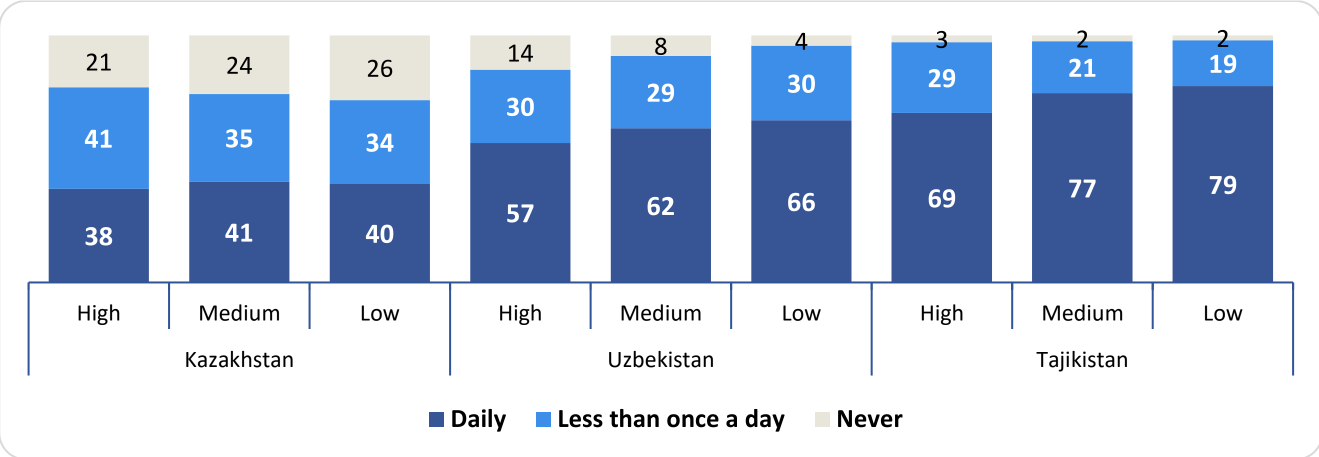
- **Increase in the proportion of daily viewers with the age**. In all three countries one can see a tendency for frequency of watching TV content to increase with the age. If in the group aged 14-18 years this figure ranges from 25-63% depending on the country, then by age 61-65 it reaches 71-92%.
- **Gap in consumption frequency between different age groups**. In Kazakhstan and Uzbekistan, the gap in viewing frequency between age groups is more pronounced.
- **Low interest of young people in TV in Kazakhstan**. It should be noted that Kazakhstan has the largest share of young people aged 14-29 (29-35%) who do not watch TV on a daily basis, while in Uzbekistan and Tajikistan this indicator does not exceed 14%.
- **Daily TV viewing in older age groups**. The highest share of those who watch TV daily is seen in the older age groups of Tajikistan (79-89%) and Uzbekistan (78-92%).

Diagram 4.2.1.2. *Viewing Frequency by Age, Percentage by Country (in percentage points)*



The data analysis of the frequency of TV viewing in different groups with different levels of material prosperity revealed a certain pattern: as wealth decreases, the intensity of TV consumption increases. Thus, we can identify a trend according to which a lower level of material well-being is associated with increased television viewing activity in the countries under consideration.

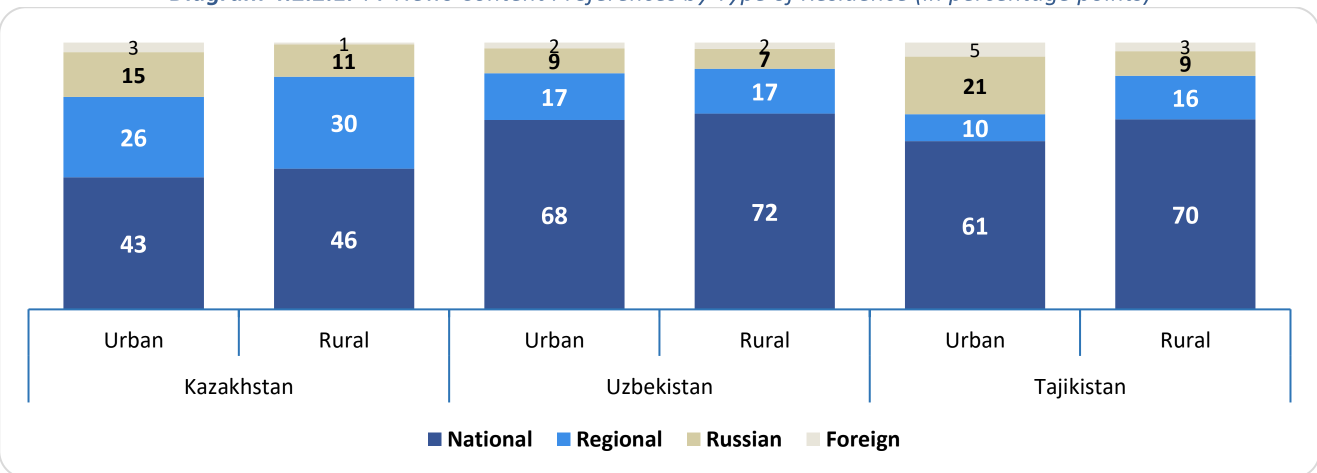
Diagram 4.2.1.3. *Viewing Frequency From Joint Income-Wealth Perspective by Country (in percentage points)*



4.2.2. Preferences in Choosing TV Channels for Watching News and Analytical Programs

The analysis of preferences in the choice of TV channels for watching news and analytical programs in the three countries shows the dominance of national television with some differences among the countries. For example, in Kazakhstan, the role of regional TV companies is noticeable along with the popularity of national channels. In Uzbekistan and Tajikistan, the overwhelming majority of respondents prefer national TV. At the same time, importance and viewing frequency of national channels is slightly higher in rural areas of all three countries than in urban. It is also worth noting that Russian TV channels are relatively popular in Tajikistan and Kazakhstan, especially in urban areas, which is not the case in Uzbekistan. In general, despite some influence of external media, national television is the most attractive source of news and analytical content for Central Asian viewers.

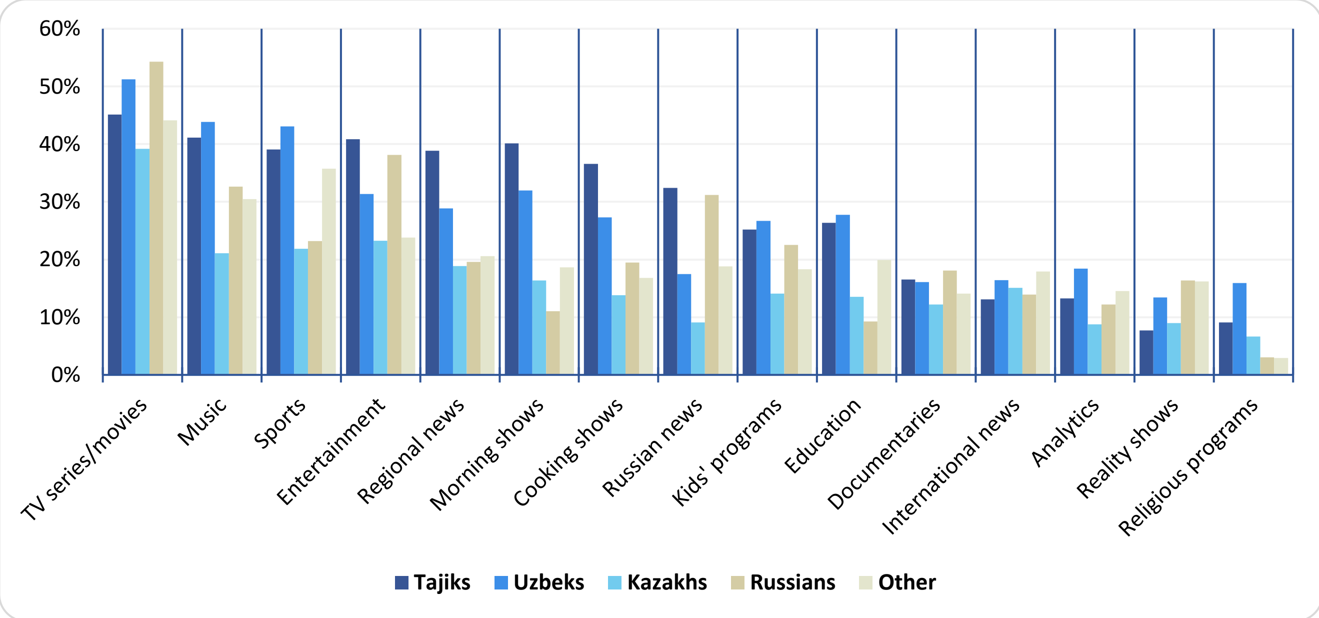
Diagram 4.2.2.1. *TV News Content Preferences by Type of Residence (in percentage points)*



4.2.3. TV Preferences of Viewers

The analysis of television preferences of ethnically diverse audience in the Central Asian region reveals both common trends and specific features. In general, all ethnic groups are characterized by an increased interest in entertainment content, primarily in TV series, movies and music programs. However, there are also differences. In particular, Tajik and Uzbek audiences are more interested in regional and morning news, educational and religious programs. Kazakh and Russian audiences show less interest in such content, giving greater preference to entertainment genres. Summarizing, it can be noted that Tajik and Uzbek audiences demonstrate a higher interest in the proposed thematic areas compared to Kazakh and Russian audiences. Here it should be mentioned about Russian news: Russians (31%) and Tajiks (32%) are more likely to consume Russian content, compared to Uzbeks (17%) and Kazakhs (9%). Thus, along with the general interest in entertainment content, preferences of the audience of different nationalities have their own specifics.

Diagram 4.2.3.1. *Content Consumption by Nationality (in percentage points)*

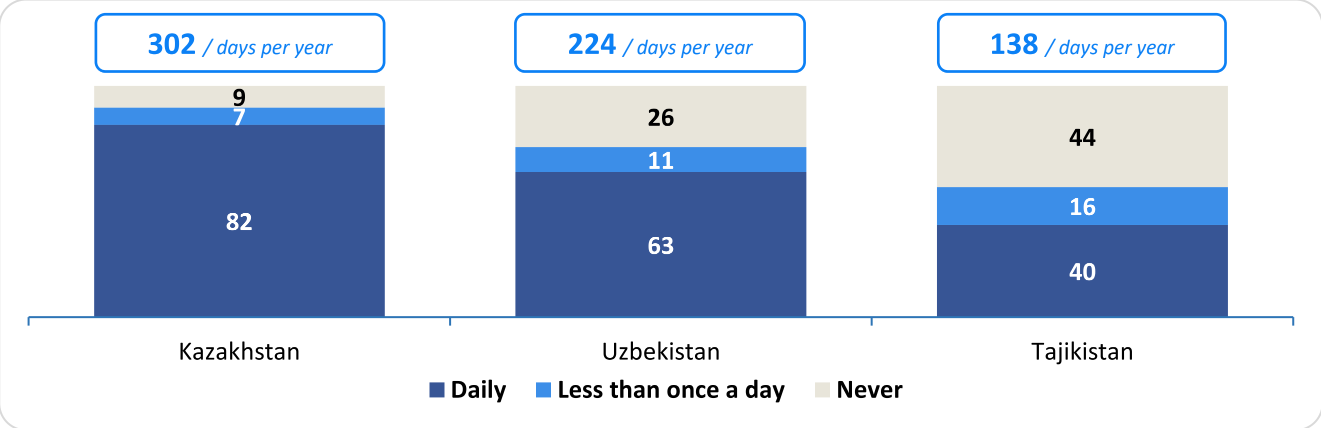


4.3. Comparison of Internet Consumption

4.3.1. Frequency of Internet Consumption

Analysis of the Internet consumption rate in the three countries shows significant differences in both the frequency of Internet use and the average number of days of online activity per year. In particular, Kazakhstan has the highest level of daily online presence - 82% of the population. The average number of days of Internet use is 302 per year, indicating long-term and constant Internet consumption. In Uzbekistan, 63% of the audience go online every day, with an average of 224 days per year. The lowest Internet consumption rate is noted in Tajikistan: only 40% of respondents use the Internet daily, and the average number of days of online activity per year is 138. Thus, Kazakhstan leads in the level of digitalization of the population with higher indicators in both the frequency of daily use and the average number of days of Internet use per year, while Tajikistan shows the lowest engagement of the audience in the Internet environment.

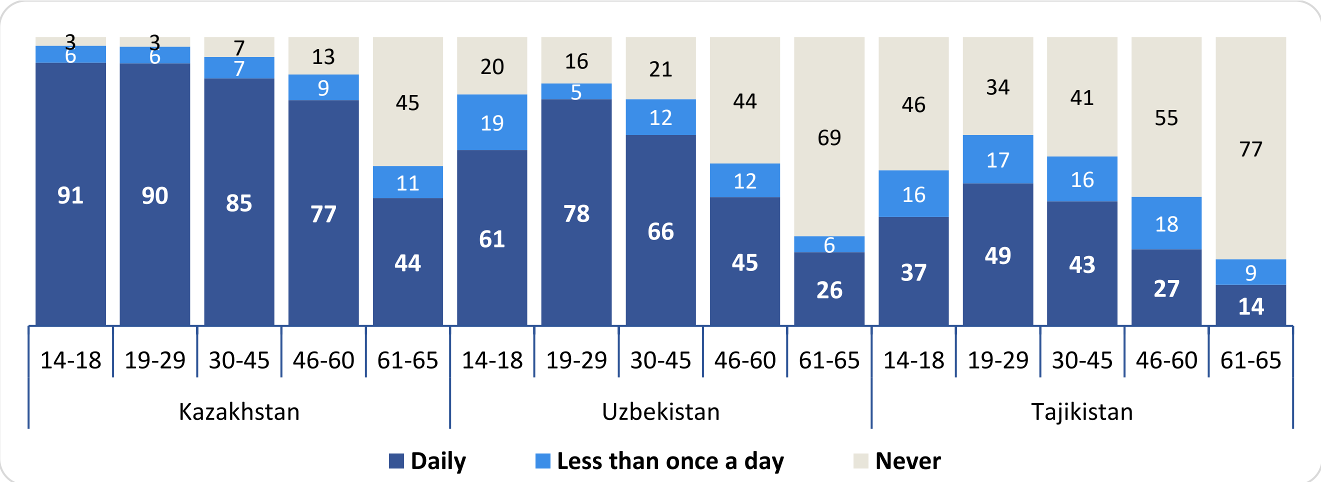
Diagram 4.3.1.1. *Frequency of Internet Consumption by Country (in percentage points)*



Analysis of the frequency of Internet use in different age groups of the three countries reveals the following patterns:

- In all three countries, the share of daily Internet users decreases with the age, while the share of non-users increases.
- A high proportion of daily Internet users in Kazakhstan (over 77%) remains up to the age category of 46-60 years. In Uzbekistan and Tajikistan, there is a sharp decline in Internet consumption after the age of 30.
- The maximum of daily Internet use in Uzbekistan and Tajikistan is seen in the 19-29 age group, while among younger and older respondents the share is noticeably lower.

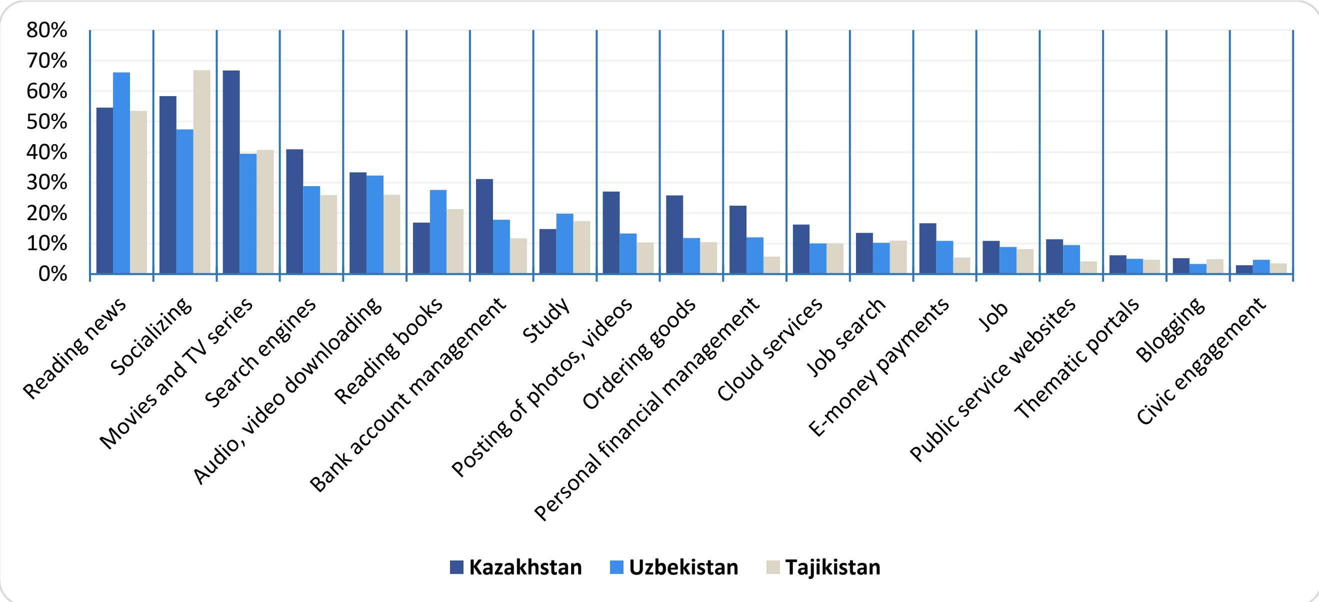
Diagram 4.3.1.2. *Frequency of Internet Use by Age and Country (in percentage points)*



4.3.2. Online Activities

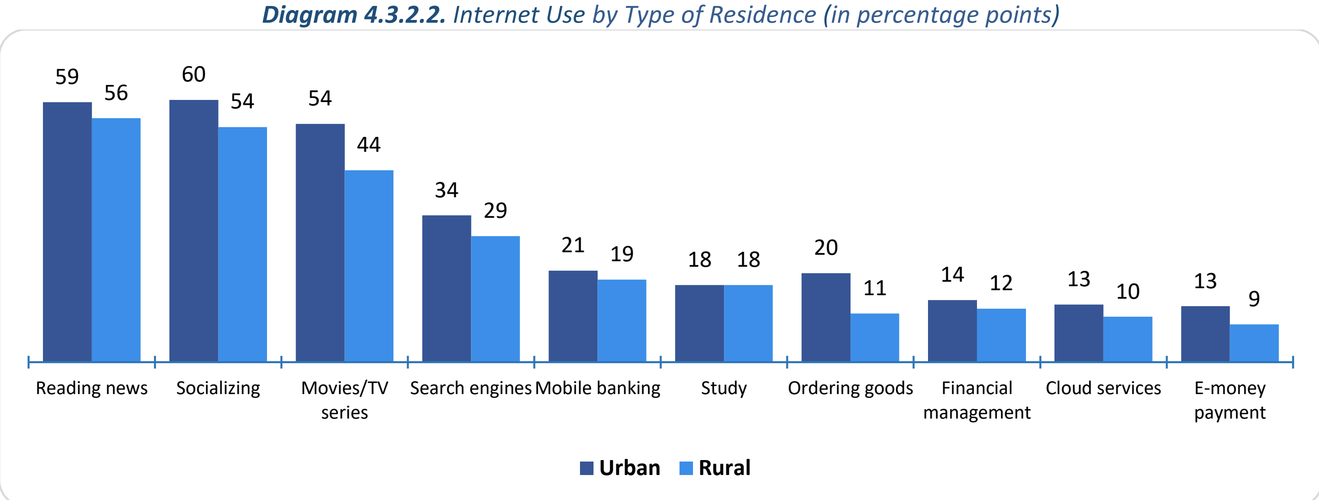
Analyzing online activity structure in the three countries under study, the following features can be highlighted: the most popular online activity in Kazakhstan is watching movies and TV series (67%), while in Uzbekistan - reading news online (66%), and in Tajikistan - social networking (67%). In addition, Kazakhstani Internet users demonstrate greater involvement in financial transactions (managing a bank account - 31% and personal finances - 22%), as well as online shopping (26%). In general, the Internet audience of Kazakhstan is characterized by a higher level of use of the network for various purposes. Thus, along with the general trends towards content consumption, communication and entertainment, the structure of online activity has its own specifics in each of the three countries.

Diagram 4.3.2.1. *Purposes of Internet Use by Country (in percentage points)*



Analyzing the Internet activity of urban and rural residents, it can be noted that, in general, the structure of online practices is similar. Thus, in both urban and rural areas the most popular online activities are reading news, social networking and watching movies/TV series. At the same time, some differences are also noted. In particular, urban respondents are somewhat more likely to make online purchases and pay for goods with electronic money. Thus, despite the commonality of basic Internet practices, the urban population demonstrates a slightly greater involvement in online commercial and financial transactions. In general, urban residents go online more often for different purposes, with the exception of educational aims.

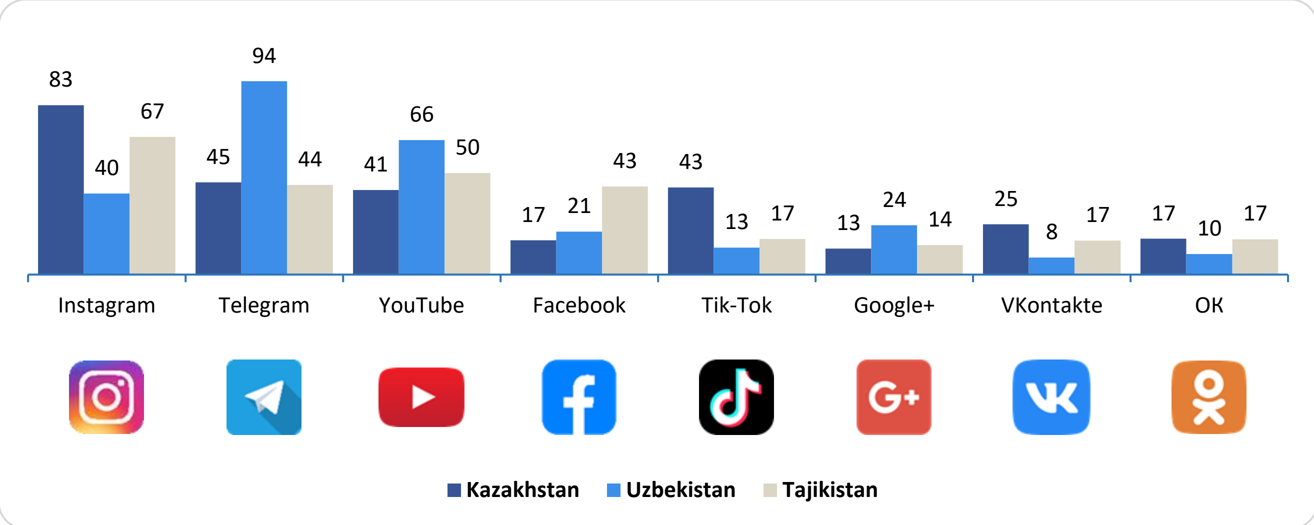
Diagram 4.3.2.2. *Internet Use by Type of Residence (in percentage points)*



4.3.3. Popular Platforms of Online Communication

The most popular online communication platforms in the three countries are the social network Instagram, Telegram messenger and video hosting YouTube. One can see as well some differences in audience preferences. In particular, Instagram is the leader in Kazakhstan, while in Uzbekistan the first place by popularity is occupied by Telegram messenger. In Tajikistan, Instagram and Facebook are the most popular. YouTube is also among the top 3 services in all three countries, indicating the demand for video content in the region. At the same time, Kazakhstan stands out for the high popularity of Tik-Tok.

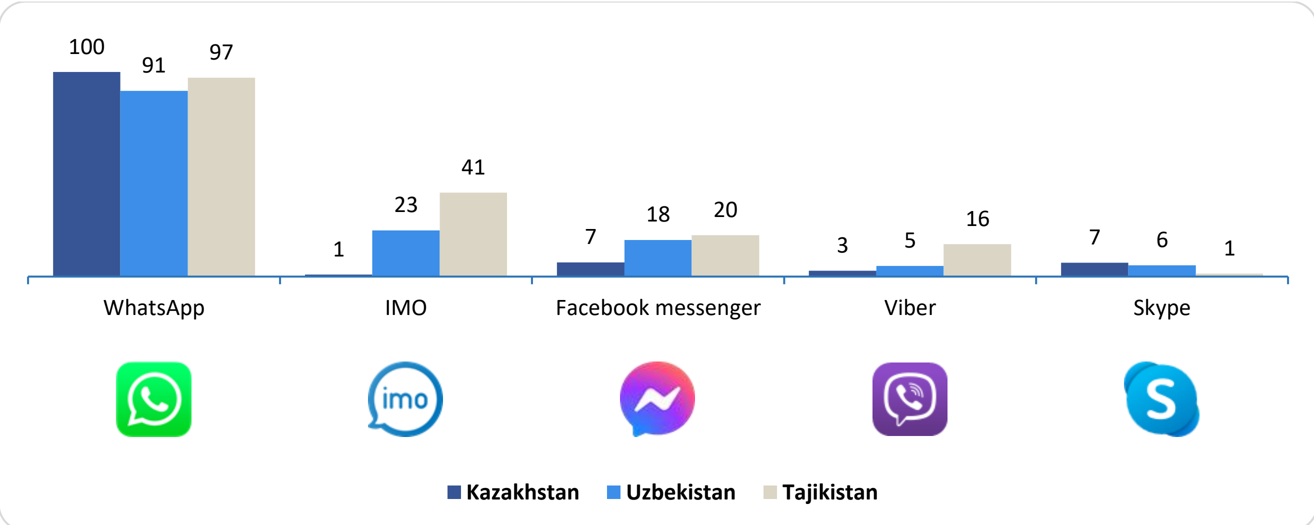
Diagram 4.3.3.1. *Use of Different* ***Social Networks*** *for Online Communication in the Last Month as From the Date of Survey, by Country (in percentage points)*



Analyzing the use of different messengers for online communication in the three countries, the following trends can be noted:

- WhatsApp is the most popular messenger in all three countries, covering from 91% to 100% of the audience.
- In Uzbekistan and Tajikistan, IMO messenger has high figures of 23% and 41% respectively.
- Facebook Messenger is also popular in Uzbekistan (18%) and Tajikistan (20%).
- The role of Skype in Kazakhstan is more prominent (7%) than in other countries.
- Viber retains its position in Tajikistan (16%).

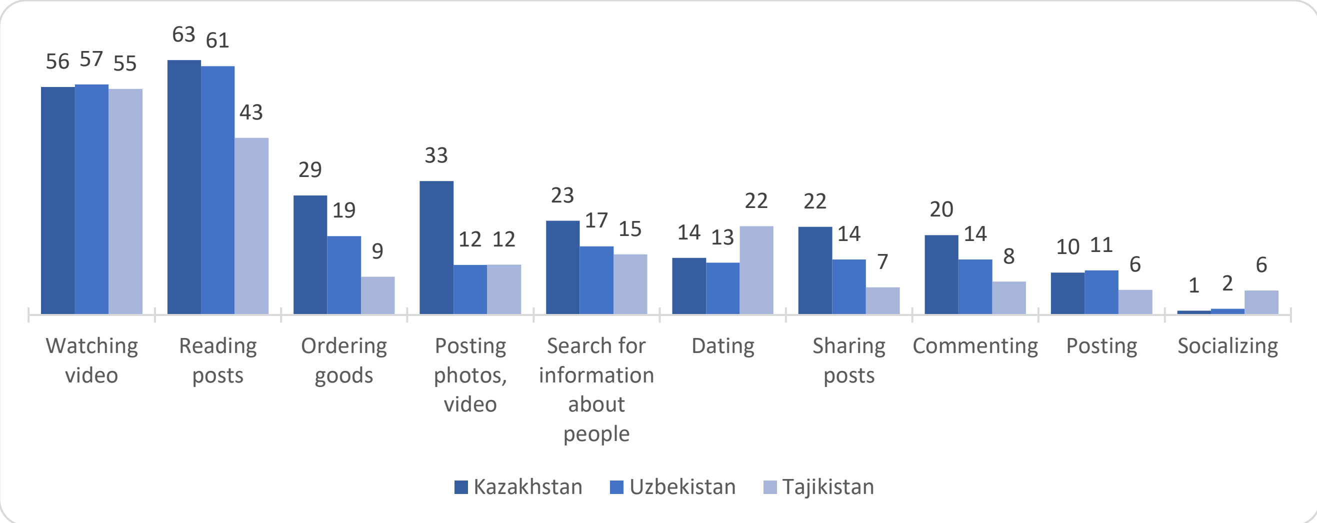
Diagram 4.3.3.2. *Use of Different* ***Messengers*** *for Online Communication in the Last Month as From the Date of Survey, by Country (in percentage points)*



4.3.4. Typical User Behaviors in Social Networks

The most common social media activities are watching videos and reading posts, indicating the role of social media as a source of content. However, one can see as well differences among the countries. In particular, Kazakhstan has a higher share of those who use social networks for online shopping and publishing photos and videos, while in Tajikistan dating is more popular. Thus, social networks fulfill not only a communicative function, but also play a role in commercial and entertainment aspects of users' lives, with national peculiarities and preferences that may differ from country to country.

Diagram 4.3.4.1. *Typical User Behaviors in Social Networks by Country (in percentage points)*

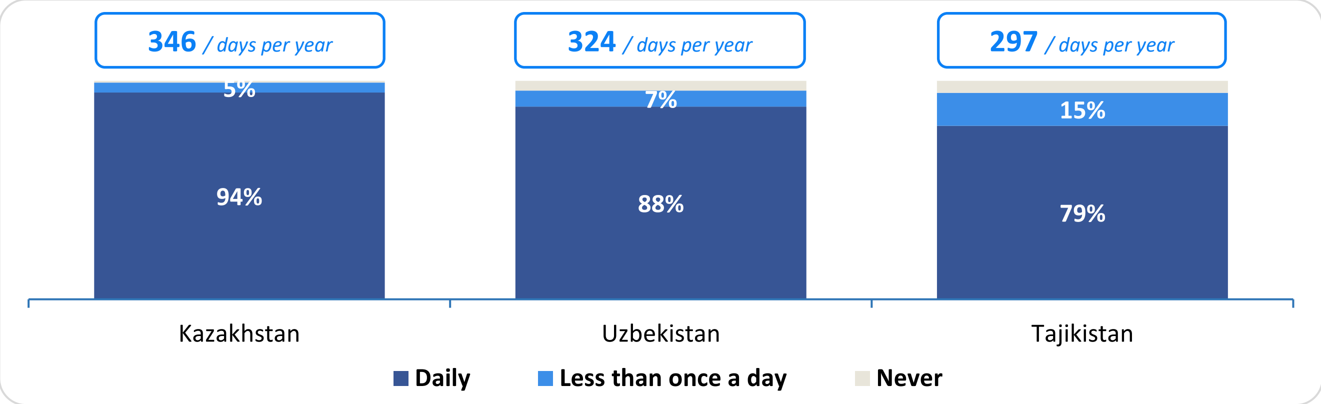


4.4. Comparison of Mobile Phones Use

4.4.1. Frequency of Mobile Phones Use

Analyzing the frequency of mobile phone use in the three countries studied, we can note a deep involvement of the audience with some differences among the countries. In particular, in Kazakhstan, mobile communication is used daily by 94% of the population, on average 346 days a year. In Uzbekistan, 88% of the audience use cell phones daily, on average 324 days a year. Whereas, in Tajikistan the share of daily mobile users is 79% and the average frequency of mobile phones use a year is 297 days, which is lower than in Kazakhstan and Uzbekistan. Hence, despite the fact that mobile technology is widespread in all three countries, there are also notable differences in the frequency and regularity of its use, with Kazakhstan demonstrating the highest frequency of use and Tajikistan slightly lower.

Diagram 4.4.1.1. *Frequency of Mobile Phones/Smartphones Use by Country (in percentage points)*

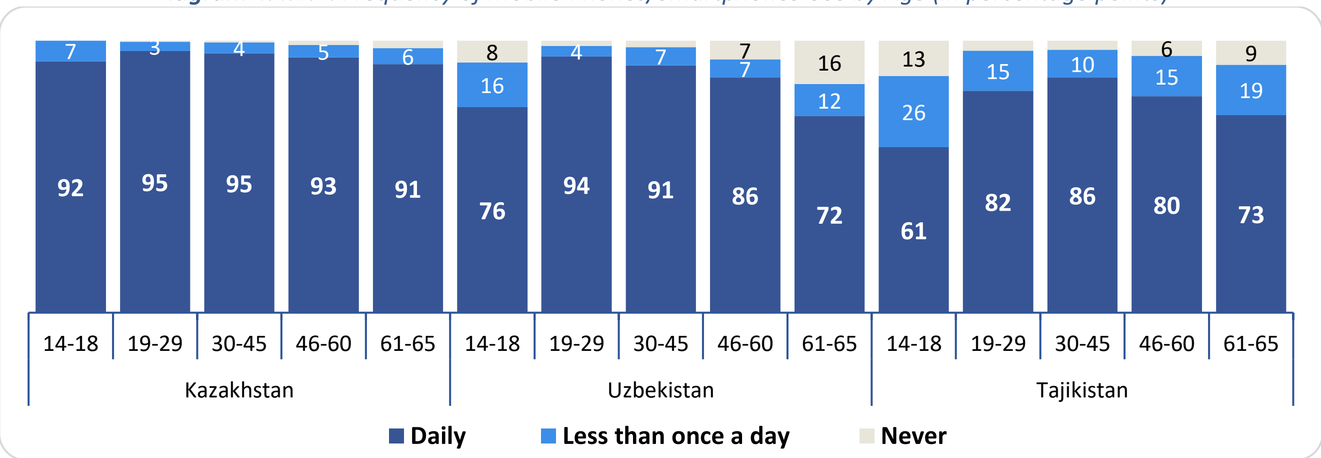


Analyzing the frequency of mobile phones use in different age groups in the three countries, the following conclusions can be drawn:

- There is a tendency in all three countries to decrease the daily use of mobile communication as the age of respondents increases.
- In Kazakhstan, even in the older group aged 61-65 years, 91% use mobile communication on a daily basis. In other countries, this figure is much lower in this age category.
- In Tajikistan and Uzbekistan, the highest proportion of daily mobile phones use is observed in the 19-45 age group, while among younger and older groups this figure is noticeably lower.

Thus, Kazakhstan has the highest level of mobile phone penetration among different age groups. The highest activity in using mobile communication in Tajikistan and Uzbekistan is seen among middle-aged people.

Diagram 4.4.1.2. *Frequency of Mobile Phones/Smartphones Use by Age (in percentage points)*

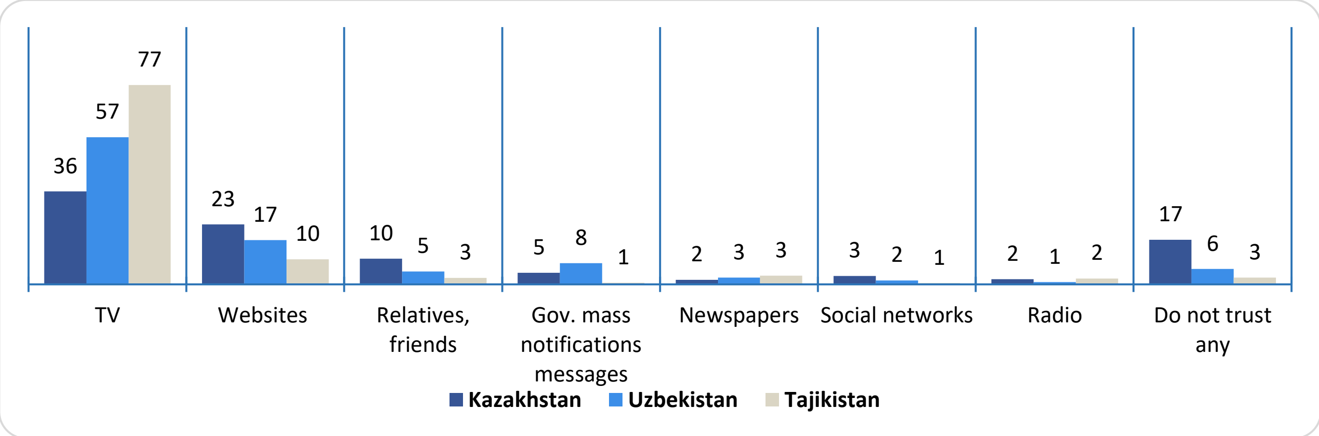


4.5. Factors of Credibility to Media Sources

4.5.1. Credibility to Information Channels

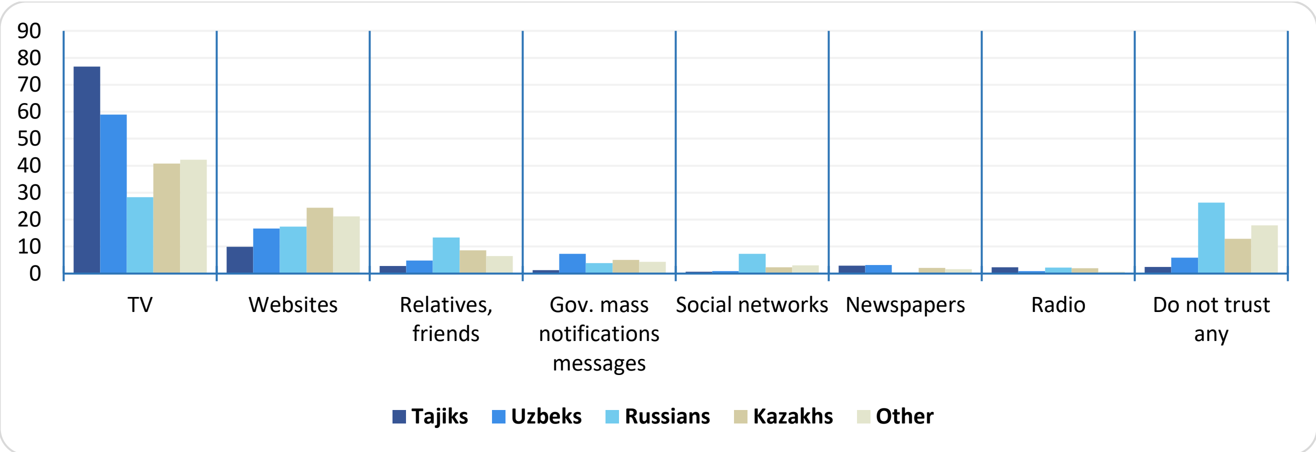
Considering the issue of credible information sources, it can be seen that television continues to be the leading channel of information transmission in the three countries. At the same time, there are also noticeable differences among the countries. In particular, in Tajikistan the overwhelming majority (77%) prefers television as the most reliable source of information. In Uzbekistan this indicator is also high - 57%. However, in Kazakhstan the leading positions have information websites (23%), while trust in TV is noticeably lower (36%), compared to other countries under review. In addition, in Kazakhstan there is a significant share of those who do not trust any media (17%). Consequently, Tajikistan and Uzbekistan demonstrate greater loyalty to television, while Kazakhstan is characterized by greater media skepticism.

Diagram 4.5.1.1. *Credibility to Information Channels by Country (in percentage points)*



Ethnic composition of the population has a significant impact on the level of credibility to different media in the countries. Tajik and Uzbek audiences retain the maximum level of trust in television (77% and 59% respectively), as they remain the dominant ethnic groups in their countries. In Kazakhstan, with its more mixed ethnic composition, the situation is different. Russians living in the country have lower trust in TV (28%) and high media skepticism (26%) than ethnic Kazakhs. At the same time, the Kazakh audience shows more trust in information from websites, compared to the Russian audience.

Diagram 4.5.1.2. *Distribution of Information Sources by Nationality and Country (in percentage points)*



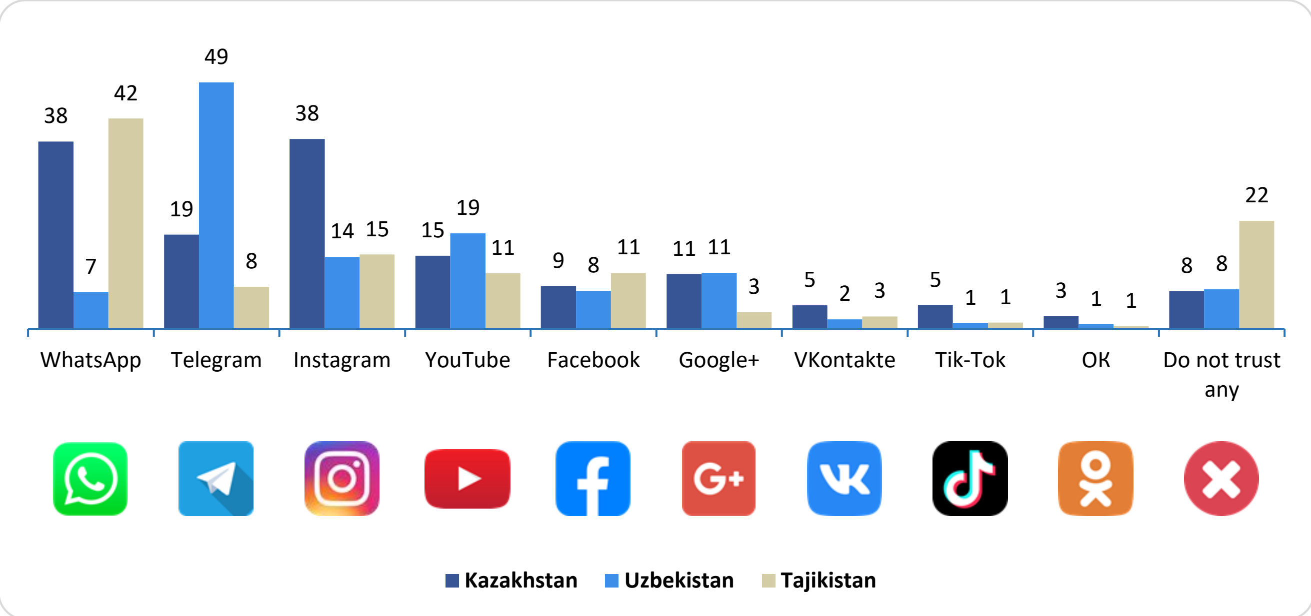
4.5.2. Credibility to Social Networks

Analyzing the survey data with respect to credibility to various social networks in Kazakhstan, Uzbekistan and Tajikistan, the following patterns can be noted.

- In Kazakhstan, the highest level of credibility of the audience is noted to the social network Instagram (38% of respondents), followed by messenger WhatsApp (38%), video hosting platform YouTube (15%) and messenger Telegram (19%).
- The leading position In Uzbekistan in terms of trust is held by Telegram (49%), followed by YouTube (19%), Instagram (14%) and WhatsApp (7%).
- In Tajikistan, the highest level of credibility has WhatsApp (42%), followed by Telegram (8%), Instagram (15%) and YouTube (11%).
- The high level of distrust of social networks in Tajikistan is noteworthy - 22% of respondents reported absence of trust. These figures are significantly higher than in Kazakhstan and Uzbekistan (8%).

Thus, Instagram and WhatsApp are leading in Kazakhstan in terms of credibility, Telegram occupies the first place in Uzbekistan, while in Tajikistan WhatsApp is prioritized.

Diagram 4.5.2.1. *Credibility to Social Networks by Country (in percentage points)*



Comparative analysis of popularity and credibility to online platforms. A comparative analysis of popularity and credibility will allow for a more detailed assessment of the specifics of media consumption and audience attitudes towards online platforms in each country. Thus, conducting a comparative analysis, we can emphasize several key points:

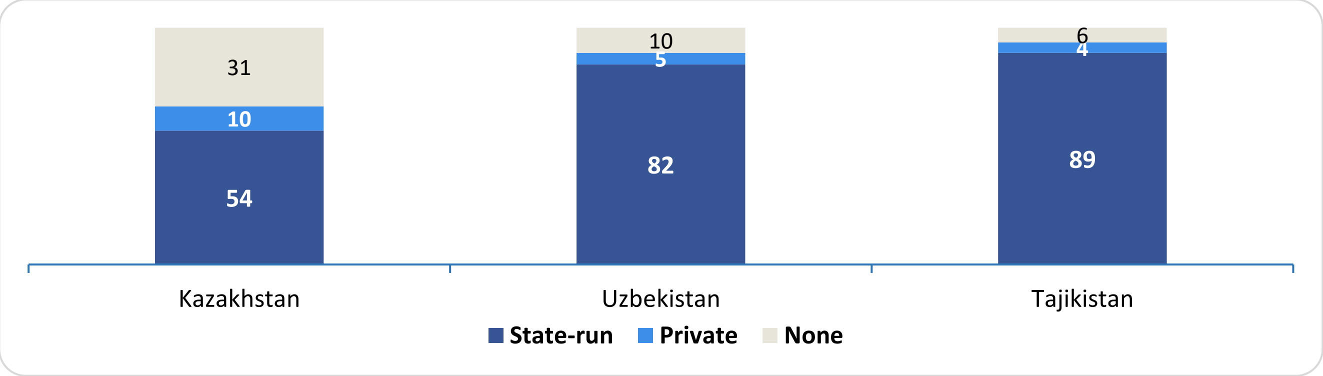
1. Instagram is the most popular platform in Kazakhstan (83%), while the level of credibility to it is much lower (38%).
2. In Uzbekistan, Telegram is leading in popularity (94%), but the level of trust in it is slightly lower (49%) than its popularity.
3. Tajikistan has an interesting situation, where the most popular platform is Instagram (67%), and the most trusted is WhatsApp (42%).
4. YouTube is among the top 3 popular platforms in all three countries (41-66%), but the level of trust in this resource is slightly lower - 11-19%. Perhaps, the audience treats YouTube more as an entertainment platform rather than an information platform.

Thus, the observed disparity between popularity and credibility to online platforms can be explained by several factors, including content quality and information credibility, relevance, user experience, and media environment. Some platforms may attract audiences with interesting content, even if it is not always reliable. In such cases, popularity may be higher but trustworthiness may be lower because users may view the platform as entertainment or entertainment-informative.

4.5.3. Trust in Various Types of Information Sources

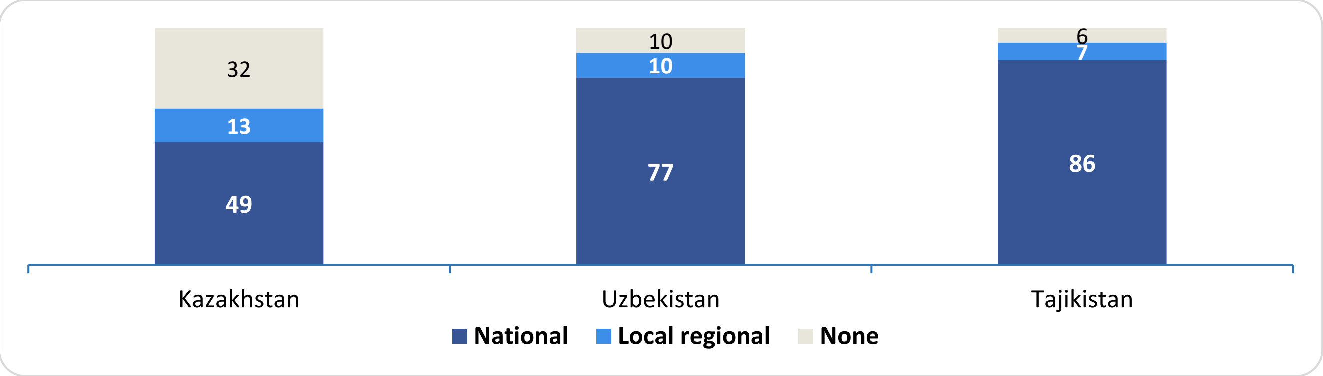
Trust in state-run/private media. In all three countries, trust in state media is predominant. The highest figures of credibility are recorded in Tajikistan - 89%. In Uzbekistan this indicator is 82%, and in Kazakhstan it is much lower - 54%. The level of trust in private media is significantly lower in all countries. At the same time, the highest level of distrust in both types of media is seen in Kazakhstan - 31%. Thus, the analysis suggests a predominance of trust in state media in all three countries of the region. However, in Kazakhstan the level of trust in media is lower and the share of distrust is higher than in Uzbekistan and Tajikistan.

Diagram 4.5.3.1. *Trust in Public/Private Media by Country (in percentage points)*



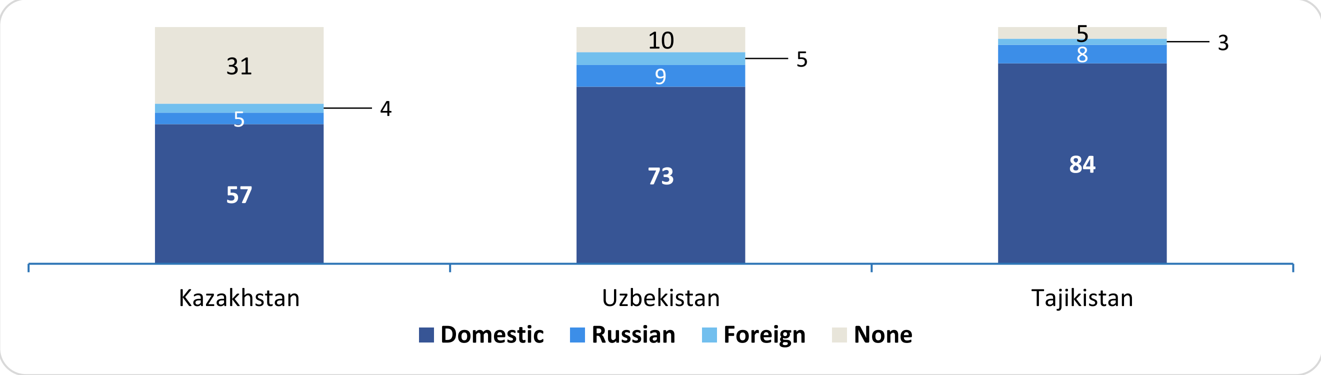
Trust in national/local regional media. The highest figures of trust in national media are noted in all three countries. The highest level of trust in them is recorded in Tajikistan - 86%. In Uzbekistan this indicator is 77%, and in Kazakhstan - 49%. Trust in local regional media is significantly lower in all countries. At the same time, the level of trust in Kazakhstan (13%) is higher than in Uzbekistan (10%) and Tajikistan (7%). Kazakhstan demonstrates the highest level of distrust in both types of media - 32%. Based on the analysis, we can speak of obvious dominance of trust in republican media in all three countries. However, in Kazakhstan, just like in the case of state media, the level of trust is lower than in Uzbekistan and Tajikistan.

Diagram 4.5.3.2. *Trust in National/Local Regional Media by Country (in percentage points)*



Trust in domestic/foreign media. Similar to the abovementioned cases, trust in domestic media is the leading indicator in all three countries. This indicator is particularly high in Tajikistan - 84%. In Uzbekistan, 73% of respondents expressed trust in domestic media, in Kazakhstan - 57%. The level of trust in Russian (5-9%) and foreign media (3-5%) is significantly lower in all countries. The highest proportion of respondents who do not trust either domestic or foreign media is again observed in Kazakhstan (31%). Thus, in all three countries one can see obvious predominance of trust in domestic media. At the same time, Kazakhstan has a lower level of such trust and a higher level of general distrust in the media. This may indicate a higher level of media literacy and critical attitude to information in the Kazakhstani society.

Diagram 4.5.3.3. Trust in Domestic/Foreign Media by Country (in percentage points)

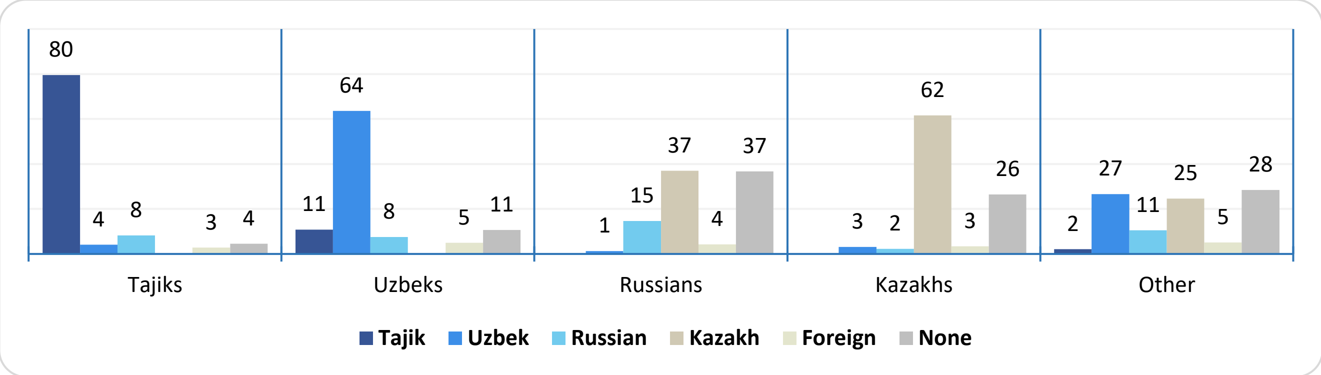


Trust in national/foreign media depending on ethnicity. Analyzing trust in media among representatives of different ethnicities in Kazakhstan, Uzbekistan and Tajikistan, the following trends can be noted:

- Titular ethnic groups of each country are characterized by a higher level of trust in the media of their ethnicity compared to the media of other countries.
- Uzbek audience demonstrates greater trust in Tajik media (11%) than Tajiks in Uzbek media (4%).
- Russians living in Kazakhstan show more trust in Kazakhstani media (37%) compared to Russian media (15%).
- Kazakhs (26%), Russians (37%) and representatives of other ethnic groups (28%) show a higher degree of skepticism towards media sources compared to Tajiks (4%) and Uzbeks (11%).

Thus, despite the general trend of greater trust in *"their"* national media, there are also nuances due to historical and socio-cultural factors of the region.

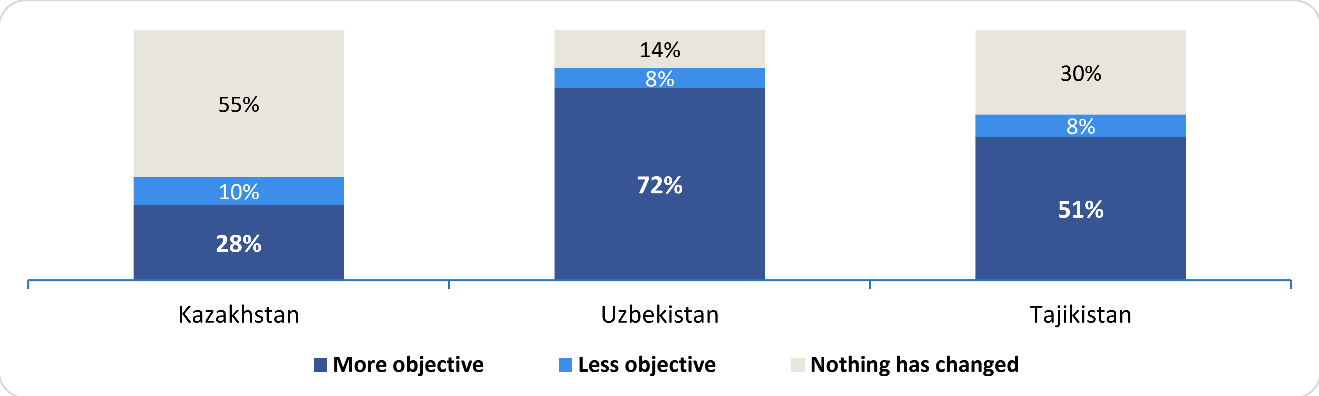
Diagram 4.5.3.4. Trust in National/Foreign Media by Ethnicity (in percentage points)



4.5.4. Objectivity in Information Coverage

Viewing an issue of objectivity of media coverage compared to the similar 2-years old situation, we can note significant differences in assessment of this aspect by the respondents of the three countries under study. In particular, the highest percentage of respondents who believe that the media in their country have become more objective in coverage is in Uzbekistan - 72%. In Tajikistan this indicator is also quite high - 51%. In Kazakhstan, the share of respondents holding this view is much lower - 28%. The most widespread opinion in Kazakhstan is that nothing has changed in terms of media objectivity over the past two years - 55%. In Tajikistan and Uzbekistan this indicator is lower - 30% and 14% respectively. As for the opinion that the level of objectivity in media coverage has decreased, then one can say that differences between the three countries are not so significant: this position is shared by 8-10% of respondents. Thus, the most positive dynamics of media objectivity is noted by respondents from Uzbekistan, while in Kazakhstan the opinion about lack of changes prevails.

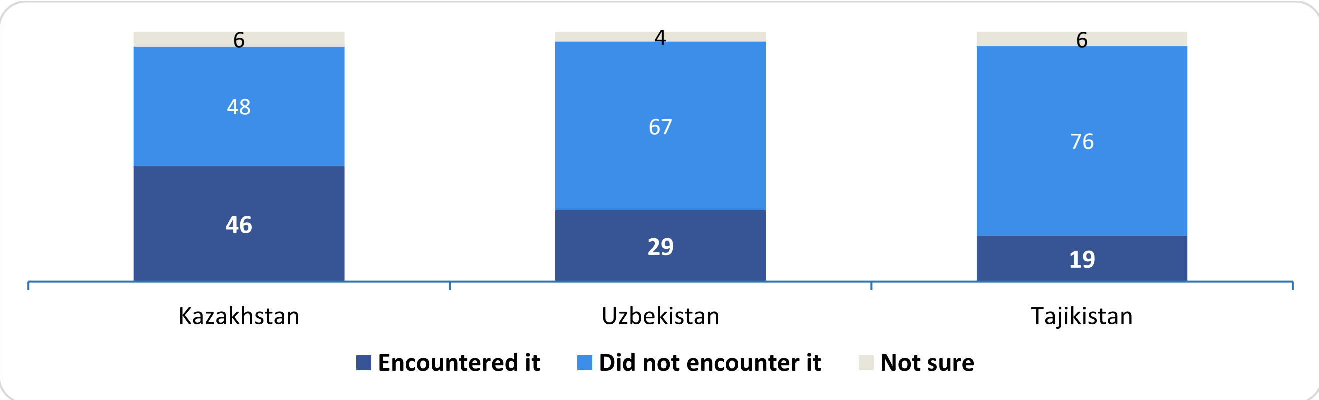
Diagram 4.5.4.1. *Dynamics of Objectivity in Media Coverage Compared to 2 Years Earlier (in percentage points)*



4.5.5. Diverse Coverage of the Same Political Event

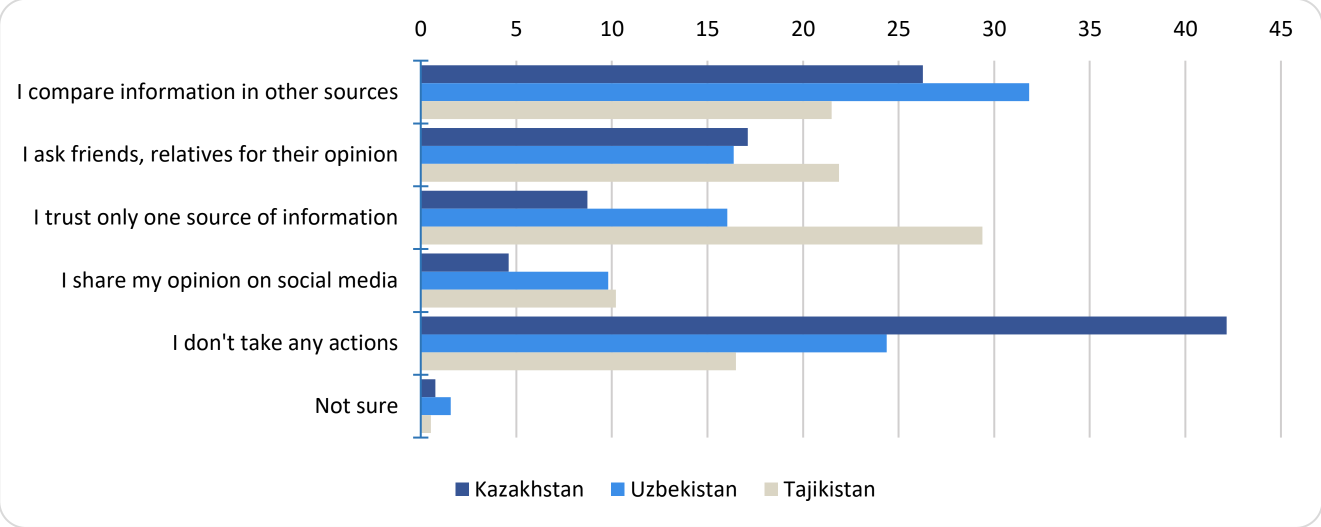
In Kazakhstan (46%) the citizens more often note facts of bias in the coverage of political events by various media. In Uzbekistan (29%) and especially in Tajikistan (19%), respondents are much less likely to experience it. This may indicate a greater pluralism and diversity of political information in the Kazakhstani media, as well as a higher level of homogeneity and similarity of news presentation in the media of Uzbekistan and Tajikistan.

Diagram 4.5.5.1. *Diverse Coverage of Political Events in Different Information Sources (in percentage points)*



In Kazakhstan and Uzbekistan, the most widespread reaction to different media coverage of the same political events is a critical approach, i.e. comparing information from different sources (26% and 32% respectively), which suggests the intention to verify data and form a true picture. However, 29% of respondents in Tajikistan trust only one source in similar cases. From media literacy development perspective, such a position is suboptimal, as it indicates uncritical trust in information from a particular media outlet. Also noteworthy is the high percentage of respondents in Kazakhstan (42%) who state that they do not take any actions when faced with contradictory information, which may indicate a passive attitude of part of the population to this problem.

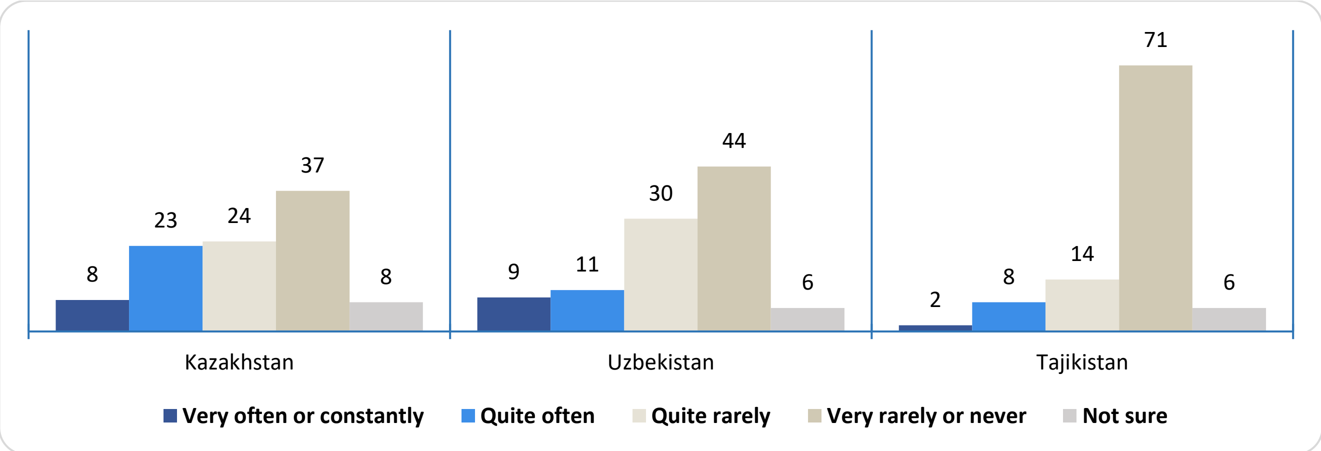
Diagram 4.5.5.1. Actions in Case of Different Coverage of the Same Political Event (in percentage points)



4.5.6. Ability to Critically Evaluate Information

Analyzing respondents' evaluation of the frequency of encountering inaccurate information in the media, it can be noted that in all three countries the prevailing opinion is that there are few or no cases of deception or imposition of a certain view point in the media. However, a closer look reveals significant differences among the countries. In particular, in Kazakhstan and Uzbekistan, a fairly significant proportion of respondents (31% and 20%, respectively) say that they face inaccurate information in the media quite often or very often. In Tajikistan, however, only 10% of respondents encounter inaccurate information in the media, while the overwhelming majority (85%) points the absence or rarity of such cases.

Diagram 4.5.6.1. Frequency of Experiencing Deception When Receiving Information from Media (in percentage points)



4.5.7. Use of Alternative Sources of Information

The analysis of respondents' preferences in the three countries regarding the search for alternative information when facing unreliable news in the media shows both common trends and significant differences. In particular, the leading strategy in all three republics is search for additional information online. However, in Kazakhstan this indicator is the highest - 54%. In Uzbekistan and Tajikistan, 42% and 32% respectively use the Internet in such cases. At the same time, in Tajikistan, friends and relatives are a popular source of alternative information, with 43% of respondents turn to them for explanations. In Kazakhstan and Uzbekistan this figure is lower - 21% and 23%. In addition, Tajikistan has a relatively high percentage of those who turn to traditional media - TV, radio and print media (19-32%). In other countries, these channels are used less frequently.

Thus, the most active use of the Internet for data verification is noted in Kazakhstan, while in Tajikistan traditional media and opinions of the close environment are more popular. At the same time, it is impossible not to note a rather large percentage of respondents in each of the countries who stated that they would not take any action to verify dubious information. This figure ranges from 22% in Tajikistan to 29% in Kazakhstan. Such data may indicate a certain level of passivity and uncritical trust of part of the audience with regard to the media.

Diagram 4.5.7.1. *Sources for Verification/Clarification of Information (in percentage points)*

4.6. Media and Information Literacy Assessment

This section describes the results of a comparative analysis of information obtained from respondents regarding their self-assessment of information literacy. An information literacy self-assessment index was created for each study participant based on their individual responses.

The information literacy self-assessment index was created based on ratings of judgments reflecting these skills. The table below shows a set of 18 judgments that were used as practical indicators of these skills.

Table 4.6.1. *List of Judgments to Assess the Level of Information Literacy*

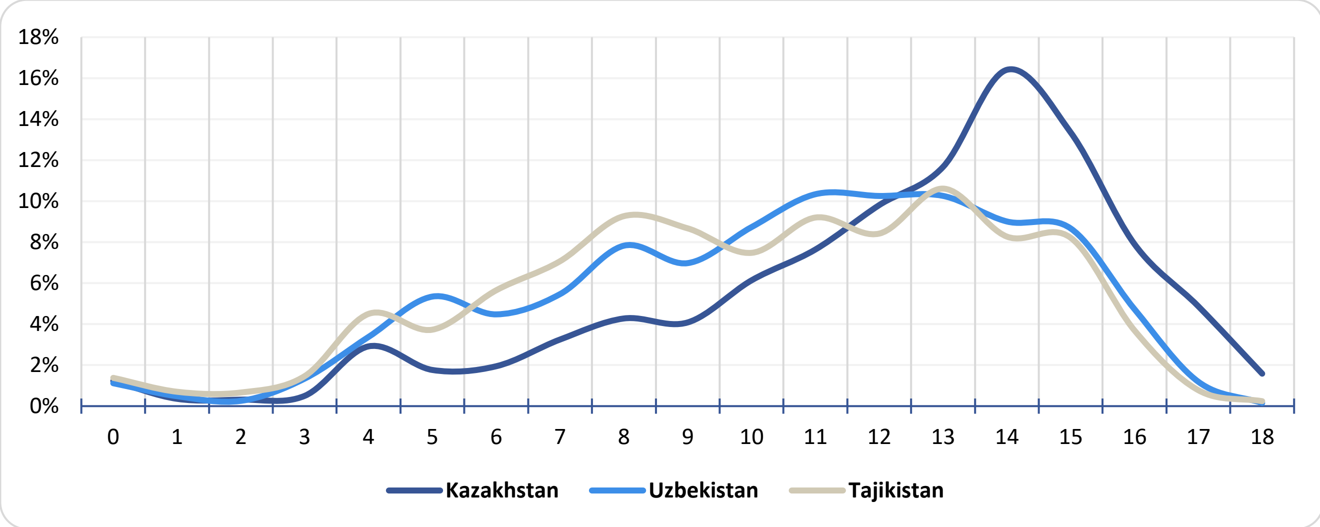
No.		"Correct" answer
1	Media should be responsible for poor quality information just as the producer is responsible for poor quality products/services	Agree
2	I think the more different sources of information, the better	Agree
3	Usually I know where (in what source) I can find the relevant information	Agree
4	The media should report only the facts, and what these facts mean, everyone will decide for his/her own	Agree
5	I can easily and quickly find any information I need	Agree
6	Different media often repeat the same information, little different from each other	Agree
7	There are media (TV channels, newspapers, magazines, radio stations, etc.) that I trust and those I do not trust	Agree
8	Having received a friend request in the social network from a stranger, I first check the profile, and then make a decision	Agree
9	Information reports from different sources often contradict each other	Agree
10	I know how to arrange my social media feed to read only information that interests me	Agree
11	I often compare information from different sources to verify it	Agree
12	When posting other people's content (information, pictures, videos, etc.) on social media it is necessary to give a link to the source	Agree
13	I can easily determine what information contains advertising	Agree
14	To assess the information from newspapers, magazines, TV, radio, etc., I try to find out whose interests this media represents, who is behind it	Agree
15	I'm used to believing what the newspapers say, what they say on TV and radio	Disagree
16	I often ask relatives or acquaintances to find the information I need	Disagree
17	I often experience fatigue from a loads of information	Disagree
18	There have been instances where I have lost time or money due to incorrect information in the media	Disagree

Each judgment has a predetermined "correct" answer corresponding to a high level of information literacy. If the respondent's opinion coincides with the "correct" answer, he/she gets 1 point - for consent with each of judgments No. 1-14 and for non-consent with each of judgments No. 15-18. Thus, the information literacy index of each respondent was calculated by a number of matches with *reference* answers. The maximum possible number of points is 18 (with 100% coincidence with all correct answers), the minimum - 0 (not a single coincidence with correct answers - complete lack of information skills).

Let us consider in more detail the distribution of respondents from the three countries by the number of points scored:

1. **In Kazakhstan**, the largest share of respondents (16%) scored 14 points out of 18 possible ones. At the same time, the highest concentration of respondents from Kazakhstan (51%) is observed in the range from 12 to 15 points. These are quite high scores, indicating that a significant proportion of the population has developed skills when dealing with information. As for the maximum score of 18 points, Kazakhstan has 2% of such respondents, the highest figures among the three countries.
2. **In Uzbekistan** one can see another situation. Here, a group scored 11-13 points stands out - 10% each (i.e. there is no strongly pronounced modal value). The highest concentration (40%) is in the range of 10-13 points. This range is slightly lower than the similar peak in Kazakhstan. None of the respondents reached the maximum score of 18 points in Uzbekistan.
3. **In Tajikistan**, the leading group with 13 points accounts for 11% (modal value in this distribution). The highest concentration (54%) falls in the range of 8-13 points - slightly lower than in Uzbekistan and Kazakhstan. No one scored the maximum 18 points either.

__Diagram 4.6.1.__ Distribution of Respondents by Information Literacy Self-Assessment Index (Percentage share based on index value)



It is also worth noting that respondents who scored:

- **0 to 9 points** in Kazakhstan account for 21%, in Uzbekistan - 37%, in Tajikistan - 43%.
- **10 to 14 points** in Kazakhstan are 52%, in Uzbekistan - 49%, in Tajikistan - 44%.
- **15 to 18 points** in Kazakhstan are 28%, in Uzbekistan - 15%, in Tajikistan - 13%.

Summarizing the analysis of respondents distribution of the three countries by a number of points in the information literacy index, we can conclude that Kazakhstan has the highest level of high scores and the highest percentage of respondents with the maximum score, while Uzbekistan and Tajikistan have more diverse distribution among the respondents, without a strongly pronounced modal value and with a lower percentage of high scores.

5. COMPARATIVE ANALYSIS OF INDEXES

5.1. Comparative Analysis of Media Literacy Indexes in Central Asian Countries

This chapter presents the index computation according to the method of media literacy measurement (ML) developed by the ZIRCON Research Group, based on the system of ML indicators adopted in the Russian Federation (ZIRCON, 2014). Thus, self-assessments of respondents' media skills were broken down into 5 categories (groups), and the so-called *private indices* of media literacy were built on the basis of this breakdown. A total of 59 elementary indicators were included in the integral index: seven in the first and third categories, eight indicators in the second category, 19 indicators in the fourth and 18 in the fifth category. The maximum value of each private index corresponds to the number of unique indicators in the corresponding category.[4] Calculation formula of media literacy composite index (MLCI) is as follows:

MLCI = I1 + I2*7/8 + I3 + I4*7/18 + I5*7/19
Varies from 0 to 35

Table 5.1 below presents average values of the private indices based on the parameters of each group, as well as the maximum possible values that these indices can take. Based on the data provided, it can be noted that average values of the private indices in 2023 have generally changed slightly compared to the data 2021 for all three countries.

- In particular, in **Kazakhstan** there is a slight decrease of the majority of private indices compared to 2021 (by ~0.3 points), except for index No. 2 (ability to protect yourself against malicious content), which increased from 3.2 to 3.5.
- **Uzbekistan** is characterized by a slight growth of indices No. 1, 2, 4 and 5 compared to 2021 and a slight decrease of index No. 3 (ability to verify and critically evaluate information). At the same time, Uzbekistan came close to the level of Kazakhstan in index No. 1 (information search) (3.0 vs. 3.5).
- In **Tajikistan**, most of the private indices remained roughly at the 2021 level, except for indices No. 2 (ability to insure oneself against malicious content), which increased and normalized to its 2019 values and No. 1 (information search), which decreased from 3.0 to 2.3 - the lowest indicator among all countries.

Table 5.1. *Average Values on Media Literacy Private Indices*

No.	Media Literacy Component	Year	Kazakhstan	Uzbekistan	Tajikistan	Max.
1	Ability to effectively search and find relevant information	**2023**	↓ **3,5**	↑ **3,0**	↓ **2,3**	*7*
		2021	3,8	2,9	3,0	*7*
		2019	3,3	2,7	3,0	*7*
2	Ability to protect yourself from malicious and redundant content	**2023**	↑ **3,5**	↑ **2,2**	↑ **2,3**	*8*
		2021	3,2	2,0	1,6	*8*
		2019	2,8	1,9	2,2	*7*
3	Ability to verify and critically evaluate information using alternative sources	**2023**	↓ **4,2**	↓ **3,7**	↑ **3,9**	*7*
		2021	4,5	3,9	3,8	*7*
		2019	3,1	3,5	3,2	*7*
4	Ability to adequately perceive information and use it effectively (competently)	**2023**	↓ **7,7**	↑ **5,5**	= **4,5**	*19*
		2021	8,0	5,0	4,5	*19*
		2019	7,6	4,6	4,8	*18*
5	Ability to disseminate information efficiently and correctly, subject to applicable law	**2023**	↓ **6,8**	↑ **5,1**	↑ **4,2**	*18*
		2021	7,0	4,6	3,9	*18*
		2019	6,4	3,6	4,4	*18*

In general, it may be concluded that the dynamics of private media literacy indices in 2023 has not shown any dramatic changes compared to the previous period. Kazakhstan is still the leader, demonstrating higher index values than Uzbekistan and Tajikistan.

[4] The method of index computation is t out in the article: D. V. Maltseva, L.V. Shubina, Yu.L. Voynilov "Media Literacy Level of the Russian Population: current status and prospects of change / XVII April International Scientific Conference on Economic and Social Development

Media Literacy Composite Index

Based on the presented private indices, an integral (composite) index was calculated (the 2nd, 4th and 5th private indices were normalized and set to a seven-point scale). Thus, the maximum possible index value amounted to 35 points.

The diagrams below show how the distribution of the integral (composite) index of media literacy shifts. In 2023, Kazakhstan's graph shifts slightly to the left - to medium and even low levels of media literacy. It should be noted as well that the graphs of Uzbekistan and Tajikistan remain almost the same as in 2021.

***Diagram 5.1.** Distribution of **MLCI 2023** by Country (in percentage points)*

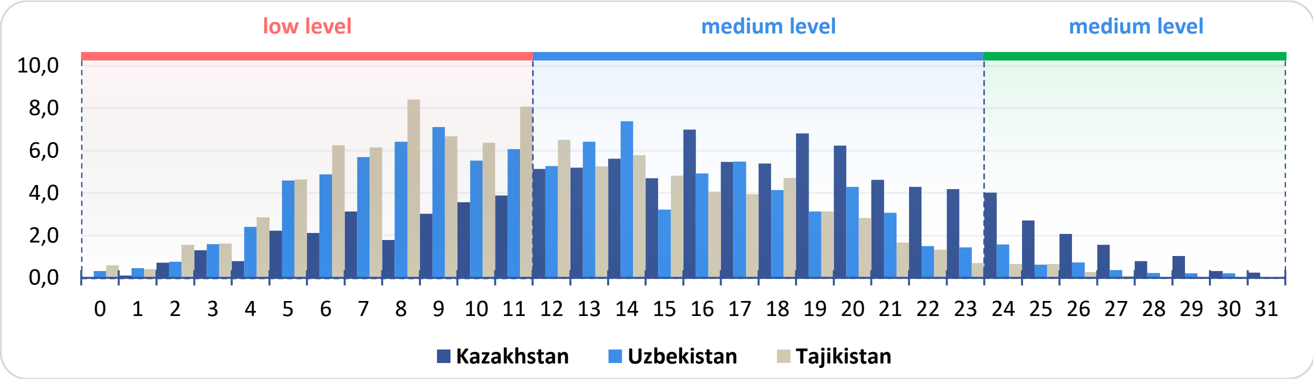


***Diagram 5.2.** Distribution of **MLCI 2021** by Country (in percentage points)*

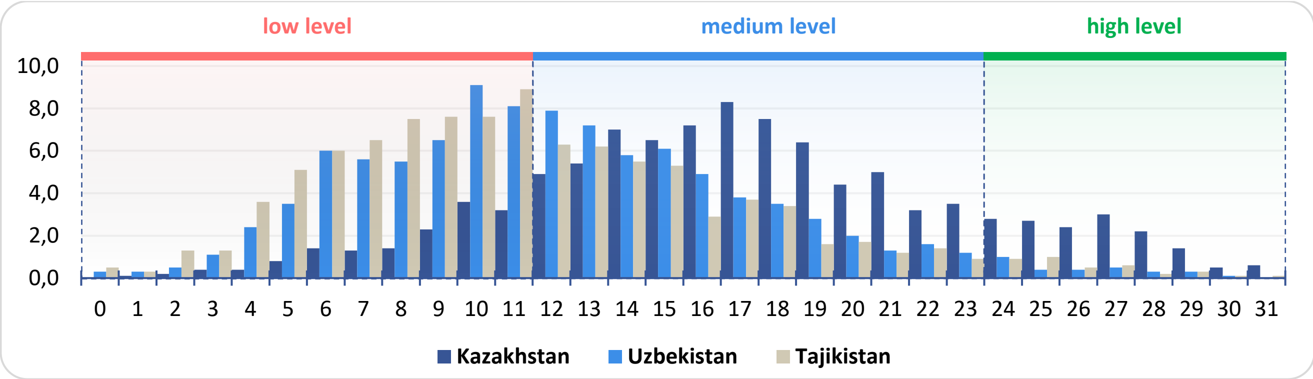


***Diagram 5.3.** Distribution of **MLCI 2019** by Country (in percentage points)*

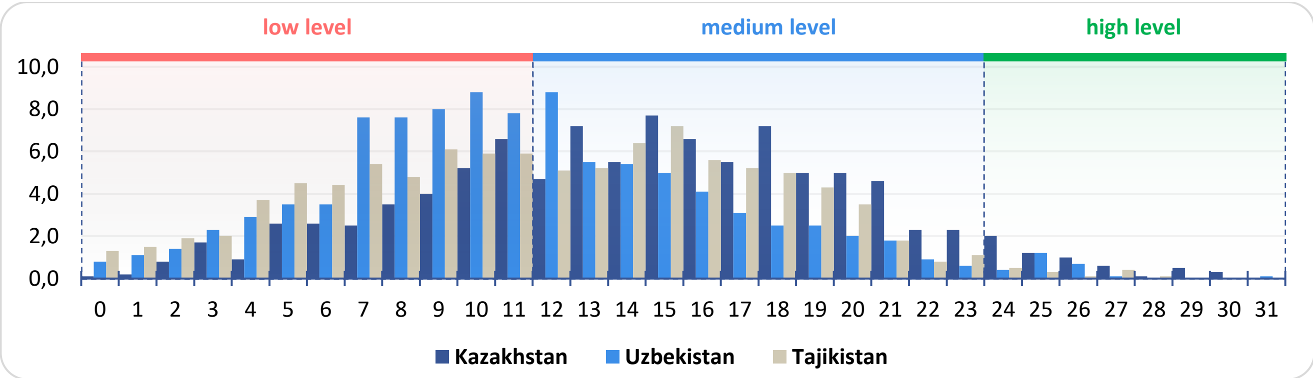


Diagram 5.4. *Distribution of MLCI in **Kazakhstan;** Comparing 2023, 2021 and 2019 yy. (in percentage points)*

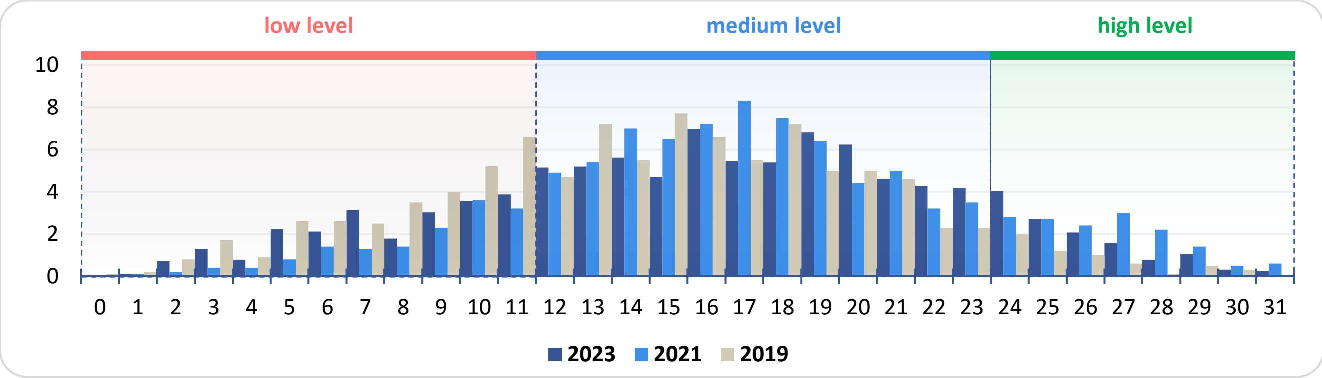


Diagram 5.5. *Distribution of MLCI in **Uzbekistan;** Comparing 2023, 2021 and 2019 yy. (in percentage points)*

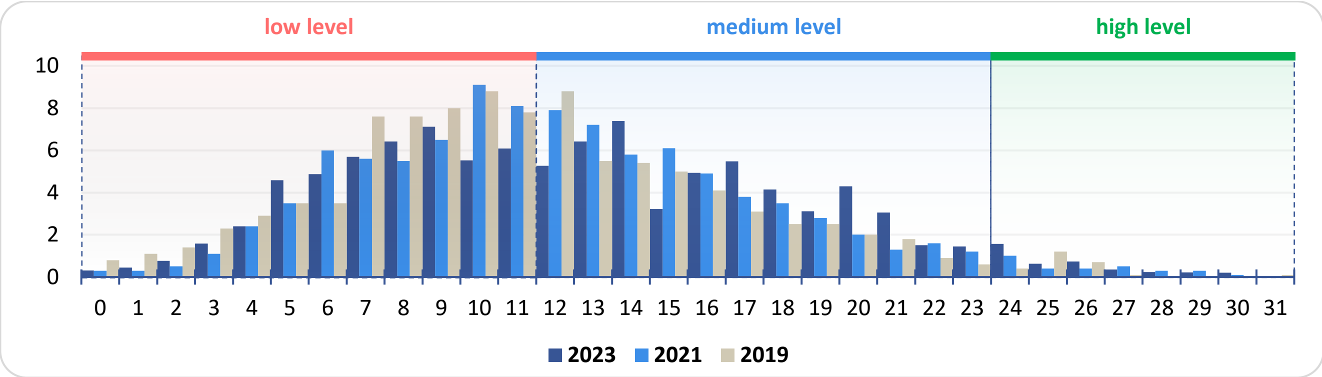
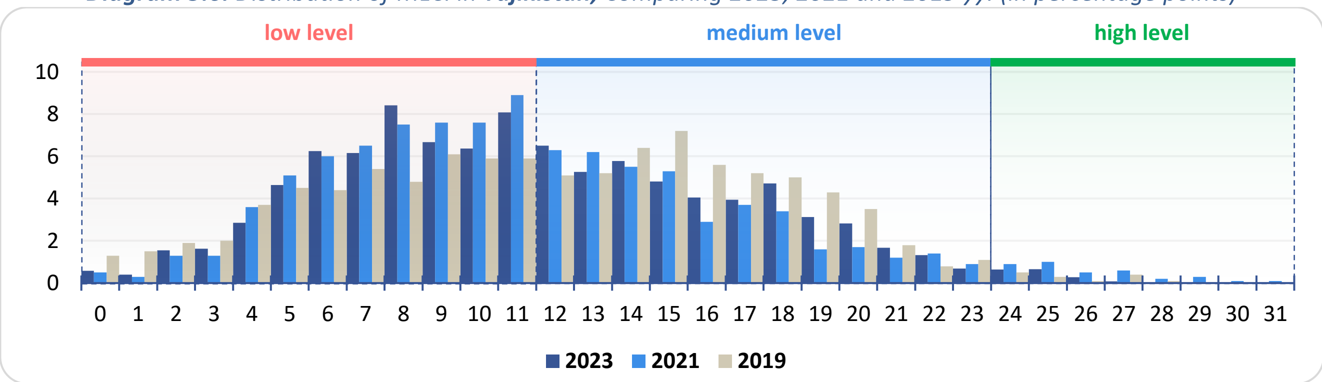


Diagram 5.6. *Distribution of MLCI in **Tajikistan;** Comparing 2023, 2021 and 2019 yy. (in percentage points)*



Breakdown of Respondents Into Three Levels of Media Literacy

Further, all respondents were broken down into three conditional groups according to the level of media literacy:
1. low level of media literacy (0-11 points);
2. medium level of media literacy (12-23 points);
3. high level of media literacy (24-35 points).

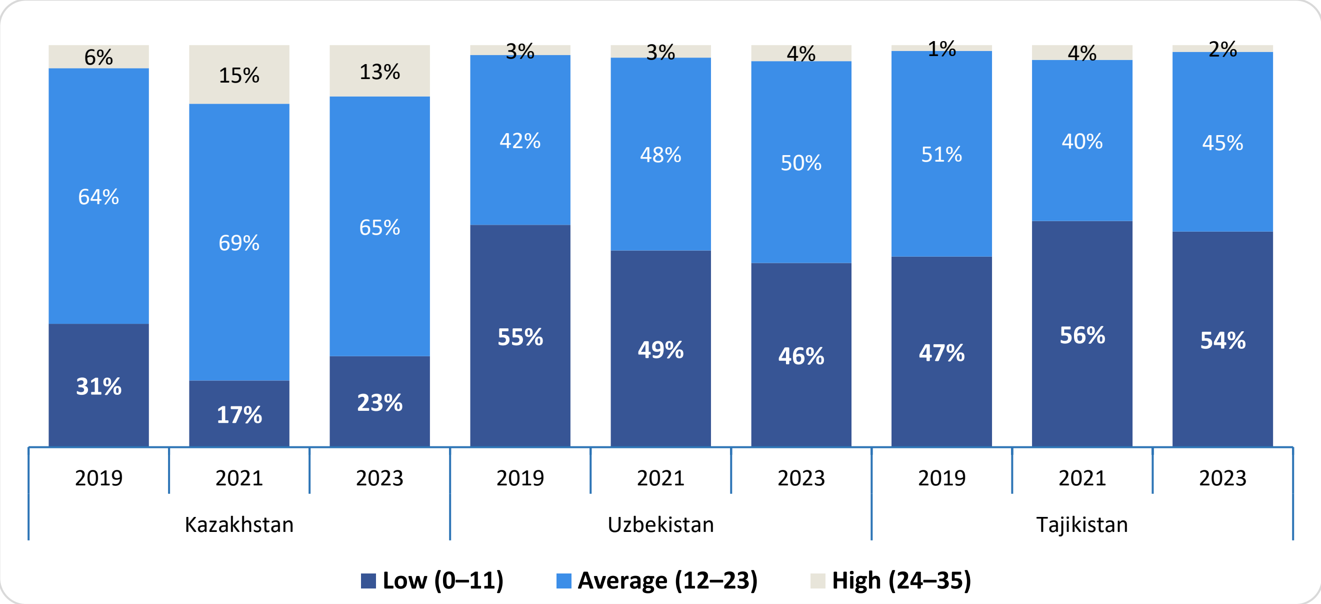
Based on this gradation, the shares of respondents characterized by each of the defined ML levels were calculated. Based on the figures obtained, the following can be noted:

- Kazakhstan is experiencing a slight decrease in the level of media literacy - the share of the population with low media literacy skills increased from 17% in 2021 to 23% in 2023. At the same time, the share of citizens with high (from 15% to 13%) and medium level (from 69% to 65%) decreased.
- In Uzbekistan, the population distribution by level of media literacy remained actually unchanged: the share of citizens with a low level decreased from 49% to 46%, while the share of citizens with a high level remained at the same level (3-4%).

- In Tajikistan, there was an insignificant positive trend: the share of citizens with a low level of media literacy decreased (from 56% to 54%), while the share with an average level increased (from 40% to 45%). However, in general, the level of media literacy in Tajikistan has strong potential for development.

In general, the 2023 results show that Kazakhstan stays in the lead, while Uzbekistan and Tajikistan lag behind in terms of media literacy.

Diagram 5.7. *Media Literacy Levels Across the Three Countries for 2023, 2021 and 2019 yy. (in percentage points)*



Average Values of Media Literacy Composite Indices

In the most general terms, the composite index can be defined as an average performance for each country under consideration. The results obtained on the dynamics of the media literacy composite index in 2021-2023 confirm the previously identified trends. In particular, Kazakhstan shows a slight decrease in the average index score, but nevertheless, this country demonstrates a relatively high level of media literacy. In Uzbekistan, there is slight growth of the integral index, indicating positive dynamics in this area. Tajikistan's score improved by one tenth and remained practically at the same level, which may be the beginning of a great increase in the future.

Table 5.2. *Average Values of Media Literacy Composite Indices by Country for 2023, 2021 and 2019 yy.*

MLCI Average Score	Kazakhstan	Uzbekistan	Tajikistan	Max Value
2023	↓ **16,2**	↑ **12,7**	= **11,6**	*35*
2021	↑ 16,8	↑ 12,2	↓ 11,5	*35*
2019	14,6	11,3	11,9	*35*

According to the adopted grading scale, among the countries studied, the average value of Kazakhstan's composite index (16.2) can be attributed to the average level of media literacy. In Uzbekistan, the average index value amounted to 12.7 points, which is on the borderline between low and medium levels according to the adopted grading scale. The lowest average value of the composite index of media literacy was recorded in Tajikistan - 11.6 points, which corresponds to a low level of media literacy.