ABBREVIATIONS

AMDEP  Afghanistan Media Development and Empowerment Project
ANJU   Afghanistan's National Journalists Union
APL    Afghan Premier League
BSA    Bilateral Security Agreement
DFID   Department for International Development
FGD    Focus Group Discussion
HCA    Household Consumption Analysis
IWPR   Institute for War and Peace Reporting
KII    Key Informant Interview
MoIC   Ministry of Information and Culture
NGO    Non-Governmental Organization
OTI    Office of Transition Initiatives
RTA    Radio Television of Afghanistan
USAID  US Agency for International Development

ACKNOWLEDGEMENTS

This report was prepared by Holly Robinson, Arezo Malakooti, Philibert de Mercey and Eric Davin (Altai Consulting).

The field research team for the audience data was managed by Atiqullah Sahibzada (project supervisor), and undertaken by Eng. Wadood (consultant), from Noma Consulting. Key Informant Interviews with media managers were conducted by Adrien Rérolle and Rateb Nabizadeh from Altai Consulting. The ratings survey was managed by Philibert de Mercey and Kamran Parwana (Altai Consulting) and undertaken by enumerators at Noma Consulting.

Altai Consulting is grateful to the many stakeholders in the media field who informed these findings, and the Afghans who kindly shared their time and opinions to make this report possible.
# Table of Contents

## Tables of figures

### EXECUTIVE SUMMARY

#### A. Introduction

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXECUTIVE SUMMARY</td>
<td>5</td>
</tr>
<tr>
<td>A. Introduction</td>
<td>14</td>
</tr>
<tr>
<td>B. Methodology</td>
<td>16</td>
</tr>
<tr>
<td>C. The media industry in Afghanistan: Ten years of research and analysis</td>
<td>30</td>
</tr>
<tr>
<td>1. 2002-2004</td>
<td>31</td>
</tr>
<tr>
<td>2. 2004-2010</td>
<td>32</td>
</tr>
<tr>
<td>3. Since 2010</td>
<td>33</td>
</tr>
<tr>
<td>4. Focusing on audience research</td>
<td>34</td>
</tr>
<tr>
<td>5. Conclusions: current trends and future areas of opportunity for research</td>
<td>35</td>
</tr>
</tbody>
</table>

#### D. Afghan media outlets in 2014: Content, positioning and programming strategies

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Introduction: Afghan media sector in 2014</td>
<td>39</td>
</tr>
<tr>
<td>2. Positioning</td>
<td>60</td>
</tr>
<tr>
<td>3. The programming landscape</td>
<td>75</td>
</tr>
<tr>
<td>4. Competition, programming and advertisement sales strategies</td>
<td>83</td>
</tr>
</tbody>
</table>

#### E. Market share according to the ratings data

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Introduction</td>
<td>88</td>
</tr>
<tr>
<td>2. Usage rate</td>
<td>89</td>
</tr>
<tr>
<td>3. Reach</td>
<td>90</td>
</tr>
<tr>
<td>4. Audience share</td>
<td>92</td>
</tr>
</tbody>
</table>

#### F. Audience behaviour and preferences: Drivers of audience choice

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Drivers of audience choice</td>
<td>100</td>
</tr>
<tr>
<td>2. Outlet: Audience perception</td>
<td>101</td>
</tr>
<tr>
<td>3. Content: Strengths of popular programs</td>
<td>113</td>
</tr>
<tr>
<td>4. Pull factor: Outlet vs. content</td>
<td>141</td>
</tr>
</tbody>
</table>

#### G. Audience behaviour and preferences: Consumption habits

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Drivers of audience choice</td>
<td>100</td>
</tr>
<tr>
<td>2. Outlet: Audience perception</td>
<td>101</td>
</tr>
<tr>
<td>3. Content: Strengths of popular programs</td>
<td>113</td>
</tr>
<tr>
<td>4. Pull factor: Outlet vs. content</td>
<td>141</td>
</tr>
</tbody>
</table>

#### H. Cross analysis

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Areas of opportunity: Strengthening the media’s sustainability</td>
<td>163</td>
</tr>
<tr>
<td>2. Looking Forward</td>
<td>168</td>
</tr>
</tbody>
</table>
TABLES OF FIGURES

FOCUS BOXES
Focus Box 1: The Rumi Music Awards and Khurshid ..................................................53
Focus Box 2: The Roshan Afghan Premier League (APL) .................................................76
Focus Box 3: The power of the storyline: The Wadi e Gorgha example .......................145

FIGURES
Figure 1: Research approach ..........................................................................................16
Figure 2: Respondents Age Pyramid ..............................................................................21
Figure 3: Complementary segments of audience analysis .............................................22
Figure 4: Number of active media outlets, 2002-2010 ..................................................33
Figure 5: TV usage rate by hour of the day ..................................................................89
Figure 6: Radio usage rate by hour of the day ...............................................................89
Figure 7: Ownership of satellite TV equipment (2014) ................................................90
Figure 8: Average daily reach, TV ................................................................................91
Figure 9: Average daily reach, radio ............................................................................92
Figure 10: National audience share, TV .......................................................................93
Figure 11: Audience share by day of the week (TV, national) .......................................94
Figure 12: Audience share by time of the day (TV, national) .......................................94
Figure 13: Khurshid’s prime time audience by day of the week (left) and gender (right) .95
Figure 14: Audience share by native language (TV, national) .......................................96
Figure 15: Audience share by province, for selected outlets .......................................97
Figure 16: Audience share by province (Arezo, Ariana, Lemar, Tolo News) ................97
Figure 17: National audience share, radio .................................................................98
Figure 18: spectrum of TV channels according to innovation and audience reach ......101
Figure 19: Ariana’s TV reach .......................................................................................112

TABLES
Table 1: Key Informant Interviews with media managers .............................................17
Table 2: Example of an audience interview record .......................................................20
Table 3: Main characteristics of the sample, per survey ..............................................21
Table 4: Breakdown of brand and content testing FGD, by location and profile ..........25
Table 5: Example HCA Journal ....................................................................................27
Table 6: Sampling for the HCA ....................................................................................28
Table 7: Average duration of media consumption per day (minutes) .........................90
EXECUTIVE SUMMARY

1. INTRODUCTION

Internews and Altai Consulting have a long history of monitoring the Afghan media sector, through a series of studies that have been conducted by Altai for Internews and USAID since 2004; the development of a ratings tool, which began in 2012; and the regular evaluation of Internews programs by Altai Consulting over the last 10 years. This study aims to build up on the knowledge accumulated in the past 10 years, with a specific objective of focusing the attention of the media on their audience as the dynamics of audience are an ever-shifting ground that needs constant research.

This study looks at the media landscape in 2014 by focusing particularly on programming and audience and, by doing so in a manner that is immediately understandable for Afghan media, aims at encouraging them to use more of this type of data to inform their strategies and practices.

2. METHODOLOGY

In order to best examine the current media environment, this evaluation was broken down into a number of qualitative research modules that looked into the Afghan media sector and their audience. It also included a further round of ratings interviews.

Firstly, **key informant interviews (KIIs) were undertaken with media managers** from across the country and across TV, radio and Internet (29 in total: 16 TV stations, 11 radio stations, and 2 websites). Most of the findings contained in the report relate to TV, because whilst radio plays a very particular, and important role in society, TV has become the most predominant type of media used in the more densely populated urban regions of the country.

Secondly, **qualitative research was conducted with the audience**, through two separate sets of focus group discussions and a tailored approach for household consumption analysis. This module included:

- 18 brand testing FGDs, which encompassed a total of 72 respondents, across three provinces (Balkh, Kabul, and Nangarhar);
- 18 content testing FGDs, which encompassed a total of 72 respondents, across three provinces (Balkh, Kabul, and Nangarhar);
- Analysis of household consumption practices through a journaling and FGD approach, which led to case studies with 4 families in Kabul, 2 families in Mazar-e-Sharif, and 2 families in Jalalabad.
Finally, **a further round of ratings interviews** were conducted to provide the most up to date figures reflecting audience and market share with 2,793 respondents being interviewed.

### 3. **Altai and the media industry in Afghanistan: 10 years of research**

The first large-scale media survey was commissioned by USAID and conducted by Altai Consulting in 2005 and the second in 2010. The 2010 study led to the initiation of regular ratings research in order to support the sustainability of the sector. It was intended to be published quarterly but only led to four rounds. More specifically:

- **The “Afghan Media in 2005” study:** concluded that the Afghan media landscape was already fairly elaborate; that Afghan men and women were equally avid and intensive media users; that radio had a prominent role in the country, while TV was essentially restricted to urban areas; and that media had an important role in the Afghan society, not only for information or entertainment, but also for education, and was expected to take an increasing role in the future.

- **The “Afghan Media in 2010” study:** found that the sector had become a profitable industry, and that compared to 2004, television had started to replace radio as the most consumed media type in many urban centers. Whilst the sector had become more complex and professional, media outlets and advertisers had very uncertain knowledge of their audience, and media placement was far from rational. The rapid growth was also deemed to be unlikely to be sustainable.

- **The ratings research:** Four iterations of the ratings surveys have been conducted since 2012, each of them showing fading radio consumption. In terms of the market share of TV outlets, there remains one dominant player but there a number of second tier outlets who manage to obtain a good share of the market when findings are disaggregated by demographics or certain time slots.

Media research is a vast field, and while large parts of it have been covered in the past decade in Afghanistan, much remains to be looked at in detail. The increasing complexity of communication channels and consumption patterns, and a growing importance of alternative media in parallel to the continuous development of mainstream media will make the sector much less easy to understand, and will generate the need for more targeted media research.
4. **Afgahn Media in 2014**

- In 2014, competition in the Afghan media sector has increased in order to attract diminishing advertising revenue. This has led to increased professionalization and a certain degree of segmentation with the introduction of specialist, niche channels.
- The pace of development of new outlets has slowed, reflecting the challenging environment, and increasing competition: There is now an average of three TV channels created each year as opposed to the average of nine in 2010.
- The programming scene looks much like that of 2010, filled with news programming, drama series, entertainment programs and political debate, with the exception of the introduction of a significant level of sports programming.
- Production remains split between national production of a number of key genres, with a high level of internationally procured series, and movies, done so by a variety of means, largely illegal.
- Whilst there is an increasing desire for internal production, financial, social and political constraints continue to make this difficult.

5. **Market Share According to Ratings Data**

- Among media users in the sample, 62% turn their TV on, and 32% turn their radio on at some point during the day, compared to 63% and 39% respectively last year.
- The prime time for TV is still from 6pm to 10pm; it is less clearly defined on the radio, with a peak in the morning, from 6am to 10am, and a second one from 7pm to 9pm.
- As became apparent in previous surveys, the radio landscape is becoming much more diverse and spread out. Both audience share and reach for radio is spreading over an increasingly larger number of stations.
- Tolo TV has lost about 4 audience share points compared to the November 2013 survey, but is still leading. The top 8 outlets, and their audience share are: Tolo (49.8%), Lemar (9.7%), Khurshid (8.5%), Ariana (5.6%), RTA (2.9%), Shamshad (2.2%), and Yak (1.5%). The largest audience share variation observed is for Khurshid, which, with an increase of 6.6 points since last year, largely due to the channel's broadcast of Turkish series, Wadi e Gorgha.
EXE Cutive Summary

6. Audience Behavior

• For those who are outlet driven viewers, trust in an outlet is related to the period of time it has been operating. Trust in a channel is also highly linked to a viewers’ trust in the outlet’s news programming.
• A trend is emerging of viewers with far less loyalty to watching an outlet, instead drawn to channels because of their program offering. For these more nuanced viewers, program choice was affected by a number of factors, including: its educational value; having an engaging storyline; providing programming that is reflective of the Afghan society and culture.

6.1 Brand Perception of TV Outlets

• Tolo is considered a strong, modern outlet, mainly because it provides trustworthy and fast-breaking news; has a program schedule that is consistent and reliable; provides high-quality and professional broadcasting at a standard not achieved by other outlets; and constantly offers a variety of new and exciting programs. They are also popular for broadcasting without fear of repercussion, and for having a strong signal in regional areas.
• RTA is considered an outlet that serves the nation's interests, with a strong capacity to represent the audience’s culture and religion. These strengths bring about a sense of patriotism and loyalty in the viewers. RTA stands out for two key areas of programming: their women-specific programs, which respect Afghanistan's cultural and religious values; and their provision of information directly from the government. However, they are also considered old-fashioned, and the high level of regard for the channel does not necessarily translate into greater viewership.
• Yak is considered a fun, innovative channel, most recognized for their capacity to provide entertaining, humorous programs. They are highly regarded for providing a professional service, indicated by their consistent programming schedule. Despite a concerted effort to remain competitive, appealing, and relevant, Yak’s audience share has steadily declined over the various rounds of audience research.
• Khurshid is known as a fun, entertaining channel, enjoyed for their high quality programming, both in terms of signal and picture quality, and for their wide program offering. In particular, Khurshid's strategic purchase of the rights to air the follow-on season of Wadi e Gorgha, which had previously aired on Tolo, was a tactical decision that secured them a significant increase in their ratings data, and could be expected to also influence the audiences’ overall perception of the channel.
• **Ariana** is well respected, but similar to RTA, not necessarily a favorite. Ariana is known for their capacity to provide high quality content; objective news from all over the country; and is seen as an outlet that serves the national interest by representing all Afghans, and adhering to their religious and cultural beliefs. Ariana is seen to distinguish itself from other channels, including Tolo, through their strong educational and Islamic programming, and by adhering to a more traditional, cultural image of Afghan society.

• **Lemar** was observed to be a channel that was copying, or stealing from other channels, perhaps indicative of a general misunderstanding of the connection between itself and Tolo, its sister channel. Nonetheless, Lemar is known as a channel that is working hard on its offering and improving as a result, and for broadcasting without fear of repercussion. As a Pashto-channel, viewers in Pashto-dominated regions enjoy Lemar for its high quality Pashto-language programming.

• **Shamshad** is highly respected by panel members in Nangarhar who believe it has the best coverage of local news, and that it is a true local outlet. Like opinions shared of RTA, our Pashto respondents indicated that they felt proud of Shamshad as an outlet and saw it as reflecting them and their culture and values.

### 6.2 STRENGTHS OF POPULAR PROGRAMS

#### 6.2.1 NEWS PROGRAMS

News is a type of programming that audience members often watch across a number of channels, for the purpose of: verifying facts; because different outlets broadcast news at different times, allowing the audience to see the news frequently; because different outlets may be strong in news from particular regions.

- **Tolo News** was by far the most popular news program amongst our panelists mainly because it broadcasts breaking news very quickly, has a consistent broadcast schedule and professional presenters and uses video clips regularly in a way that supports the story.

- **Shamshad News** is very popular in Nangarhar for the fact that it is focuses on local news from the Eastern region and broadcasts in local languages. Its strong signal and professional reporters also impart confidence in the reliability of its content.

- **Ariana News** is respected for offering trustworthy news, an impression that is given by its wide geographic coverage. They are perceived to be seeking depth and accuracy in their news, rather than just exciting headlines.
However, Ariana was also noted for paying little attention to their studio and design.

- **Yak News** is appreciated for providing a professional news service similar to Tolo. In particular, Yak is popular for having reporters on location.
- **VOA News**, aired on RTA, is appreciated for its professionalism, and its competence in covering international news. As a pre-recorded show, VOA does not cover breaking news, allowing it to provide greater depth and investigative journalism.

### 6.2.2 Drama Series

**Tolo, and Khurshid** are considered particularly strong in their drama offering. **Tolo** is popular for its dubbing quality, its constant innovation, and for being the first outlet to produce Afghan series. **Khurshid's** innovation, and dedication to providing new dramas is seen to put it in competition with Tolo.

- **Wadi e Gorgha**, on Khurshid, is seen to be less “intrusive” than some other dramas as it is not based on families or love stories but rather on a mafia/police story. The notion of a government and its counter-power resonates with Afghans who see parallels with the Taliban.
- **Fariha**, on Tolo, predominately a class based love story, is strongly preferred by females, who appreciate the opportunity it affords them for learning about human interaction. The high quality dubbing also makes it popular.
- **Hürrem Sultan**, on Yak, provides role models by showing a time of Islam’s greatness, for both men and women. The series was noted for being slow-moving, potentially losing some its appeal to an audience accustomed to fast-paced, exciting dramas.

### 6.2.3 Entertainment Programs

In the entertainment genre, **Tolo** is appreciated for offering entertainment programs that are also educative. **Khurshid** is noted for creating programs that aim to keep the government accountable by using comedy. **Yak's** entertainment offering is seen as a driving force of their success. The audience is looking for larger educational opportunities in entertainment programs, and to see them broadcast from other parts of Afghanistan.

- **Shabkhand**, a comedic talk show on Yak, is popular for its humor, with a large part of the program's value seen in its presenter, who has the ability to make light of everyday challenges. The guests featured on the show are also well appreciated, giving the audience the opportunity to learn more about Afghan personalities.
• **Lahza ba Lahza**, a game show on Tolo, is appreciated not only for its entertainment value, but also for providing educative stimulation to the younger generation, giving them hope for success, and the opportunity to earn money.

• **59 Minute Duel**, a cooking show where contestants compete with the show’s chefs, shown on Ariana, is popular, particularly with women, for its capacity to teach fast, economic cooking techniques, and for its discussion of health and nutrition issues.

### 6.2.4 Women’s Programs

**Tolo, Ariana, and RTA** are seen as leaders in women’s programming. For **Tolo**, this is due to their capacity to carry the voice of women to people of authority and influence; for providing examples of successful female leaders; and for providing great advice for women through experts. **Ariana** is enjoyed for holistically covering the entirety of issues and aspects of an Afghan woman’s life. **RTA** is particularly commended for their skill at promoting women’s rights, but within the framework of Islam. However, women are calling for more leadership examples and for greater training opportunities in women’s programming.

• **Banu**, a talk show on Tolo which allows women to call-in and seek advice from a psychologist and a presenter is primarily popular for its interactive format, with women enjoying the capacity to directly engage with an “expert.”

• **Ashpaz Khana**, a cooking show on Khurshid, is popular for teaching audience members how to cook new foods, in an economical fashion, as well as informing them of nutrition facts.

• **Ariana dar Nima Rooz**, a women’s program on Ariana, is well loved for its capacity to cover all aspects of a woman’s life, in a magazine format.

### 6.2.5 Political Debate Programs

In the political debate genre, **Tolo and Tolo News** are considered leaders for their serious and high quality journalists, their capacity to access the right people, and for providing an interesting studio and set. **Yak** is seen as a leader for their capacity to invite guests of a high level, and who appear to be at the crux of the issues they discuss. Men amongst our sample are requesting that debate programming be more inclusive of more Afghans from different parts of the country so that everyone’s voice is heard.

• **Fara Khaber**, on Tolo, is appreciated for having the courage to ask potentially controversial questions; linking problems with solutions; and accessing key individuals to appear on the show who have the ability to make a difference.
• **Tawdi Khabari**, on Lemar, is vying for popularity with the other Pashto debate program, **Tawda Bahsuna**, on Shamshad. With most of the top debate programs fairly similar in their quality, capabilities and format, the choice to watch one program or the other relies largely on interest in the topic being aired, and the guests that form a part of the show, rather than the program itself.

### 6.3 Consumption Patterns

• Most viewers know very little about the program schedule, aware only of the time of their favorite programs, or the programs they watch regularly. This implies that if the scheduled time of a program changes, or if a program is running late, there is the potential to lose audience. It also indicates that it is difficult to introduce new shows into the audiences’ viewing habits.

• There appears to be greater awareness of the schedule of Tolo programs, mainly because Tolo has a schedule that is fixed and runs on time and advertised regularly, often within its programs.

• One of the most common ways that panel members learn of a new program is by being exposed to an advertisement of it whilst watching another show on the same channel.

• The act of honoring guests who come to stay at one’s home, by allowing them to control the remote control, can introduce families to programs they may not have otherwise seen. Talking to family and friends in other locations on the phone or in social circles is another way to learn about new shows.

### 7. Areas of Opportunity

• **Professionalism** was identified as a key factor setting the first tier apart from the rest and as having the potential to fundamentally shift an outlet’s reputation. It relates to sets and studios, presenters, and the quality of the content (signal strength and dubbing quality).

• A more content-driven audience requires a greater focus on content—outlets would benefit from investing in their content or identifying “Key” programs.

• **Capturing new viewers** can be achieved by increasing the audience’s knowledge of an outlet’s schedule. Some ways that this can be achieved include:
  o Using news programming as an opportunity to capture non-regular viewers, by advertising other programs during their commercial breaks;
o Providing a schedule that consistently runs on time, which could potentially increase an outlet's reputation for being professional, as well as their hold on their audience;

o Taking every opportunity to consistently remind the audience of the program schedule;

o Distributing scheduling information through new means.
A. INTRODUCTION

1. BACKGROUND

Internews and Altai have a long history of monitoring the Afghan media sector, through a series of studies that have been conducted by Altai for Internews and USAID since 2004; the development of a ratings tool, which began in 2012; and the regular evaluation of Internews programs by Altai Consulting over the last 10 years. This study aims to build up on the knowledge accumulated in the past 10 years, with a specific objective of focusing the attention of the media on their audience.

During past research, it was systematically observed that even the most advanced media outlets in the country had a very limited understanding of their audience, and were thus unable to use such knowledge to inform their development strategy, their programming and their commercial negotiations with advertisers. Therefore, they were lacking a key set of tools and capabilities that can improve their sustainability.

Thanks to previous studies, many of the general patterns of media consumption in Afghanistan are well understood. The dynamics of audience are however an ever-shifting ground that needs constant research. Indeed, most Afghan media users have now access to a large variety of increasingly more sophisticated channels and programs. Understanding new developments, if and how the audience is attracted to new shows for example, calls for regular audience research, both at large-scale and at very fine, qualitative levels. The ratings system can address the former; typical user group research (brand research, content testing, satisfaction surveys, non-users surveys, etc.) should take care of the latter, but is very seldom performed by media themselves.

This study, therefore, is aimed at describing the current dynamics at play, and by doing so in a manner that is immediately understandable for Afghan media, aims at encouraging them to use more this type of data to inform their strategy and practices.

To this end, this mission includes both a research component, the results of which are contained in this report, and a training component that will follow. The research component aims at understanding what Afghans listen to or watch, and for what reasons, through both quantitative and qualitative components; and how the media's perception of audience dynamics drives their programming.

Field research was conducted between September and November 2014.
2. Objectives of the Research

The overarching objectives of the research were to give an updated picture of the Afghan Media after 12 years of continuous support by the international community. It focused on better understanding audience trends, and identifying key challenges for the coming years, as well as potential areas of opportunity.

The general objective of the project was to better understand the Afghan TV audience, and to see how this knowledge informs the programming and marketing strategies of the Afghan media. The main goal of this research was to provide the Afghan media sector an opportunity to look towards their audience for a greater understanding of how to build a sustainable future. The tools used were designed as examples of tools easily attainable, that the industry itself could use to maintain a better understanding of their audience, and move towards a self-sustainable future.

A number of specific objectives were pursued:

- Bringing together all Altai research done on the Afghan media sector, and thereby telling the story of what has been done over the past 10 years, as well as tracing the development of the sector;
- Updating the ratings data available (audience data) with a new round of interviews;
- Understanding to what extent Afghan media managers know their audience, and how they use this knowledge for their programming and advertising negotiations;
- Adding breadth to the ratings exercise by adopting a qualitative module to understand the reasons behind the popularity of the programs of “top-tier” outlets, as well as the strengths and added-value of the programs of “second-tier” outlets;
B. METHODOLOGY

1. APPROACH

In order to best examine the current media environment, this evaluation was broken down into a number of qualitative research modules that looked into the Afghan media sector and their audience. It also included a further round of ratings interviews.

The study utilized both a “top-down” approach looking at the processes and perceptions of the media outlets (module 1), as well as a “bottom-up” approach, investigating the audience at the community level (module 3).

For the first module, key informant interviews (KIIs) were undertaken with media managers from across the country to understand how the programming landscape had evolved since the last media evaluation.

For the second module, qualitative research was conducted with the audience, through two separate sets of focus group discussions (FGD) and a tailored approach for household consumption analysis. The intention of this module was to understand qualitatively why some outlets performed better than others and to gain an update on preferences amongst the Afghan audience.

Finally, a further round of ratings interviews (module 2) was conducted to provide the most up to date figures reflecting audience and market share.

Figure 1: Research approach
2. **Module 1: Key Informant Interviews with Media Managers**

2.1 **Objective**

The objective of the media manager interviews was to collect key information on the evolution of programming in the Afghan media sector over the last 5 years, by looking at the strategies and vision of these outlets. This involved an open discussion on their vision of the dynamics of the Afghan media landscape, and how it has been evolving.

This module sought to investigate how media managers currently gauge their audience, and to what extent they use this information to inform their strategy, as well as providing an updated overview of the Afghan media in 2014.

2.2 **Sampling**

Table 1: Key Informant Interviews with media managers

<table>
<thead>
<tr>
<th>MEDIA OUTLET</th>
<th>Name of Respondent</th>
<th>Position at Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kabul</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Aina</td>
<td>Feridum Ilham Mahhmudi</td>
<td>General Manager</td>
</tr>
<tr>
<td>2. Arezo</td>
<td>Arash Amini</td>
<td>Marketing and Sales Director</td>
</tr>
<tr>
<td>3. Haft</td>
<td>Hamid Ahmadi</td>
<td>Operations Manager</td>
</tr>
<tr>
<td>4. Khurshid</td>
<td>Sami Sahim</td>
<td>CEO</td>
</tr>
<tr>
<td></td>
<td>Abed Khorami</td>
<td>Production Manager</td>
</tr>
<tr>
<td></td>
<td>Seyed Jamil Sadat</td>
<td>Owner</td>
</tr>
<tr>
<td>5. Moby Media Group</td>
<td>Zaid Mohseni</td>
<td>Group COO</td>
</tr>
<tr>
<td></td>
<td>Shafic Guwhari</td>
<td>CEO</td>
</tr>
<tr>
<td>6. Rah-e-Farda</td>
<td>Ghulam Abbas Agah</td>
<td>Production Manager</td>
</tr>
<tr>
<td>7. RTA</td>
<td>Abdul Rahman Panjshiri</td>
<td>Policy and Planning, and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>International Relations Director</td>
</tr>
<tr>
<td>8. Saba</td>
<td>Sayed Hewad Hashemi</td>
<td>Program Coordination Manager</td>
</tr>
<tr>
<td>9. Yak</td>
<td>Daniijela Habeck</td>
<td>Business Developer</td>
</tr>
<tr>
<td>Herat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Faryad</td>
<td>Khalil Amiri</td>
<td>CEO and owner</td>
</tr>
<tr>
<td>11. Asia</td>
<td>Nooraqa Hariwa</td>
<td>General Manager</td>
</tr>
<tr>
<td>12. Baran</td>
<td>Ahmad Wahed Eaman</td>
<td>CEO</td>
</tr>
<tr>
<td>Mazar-e-Sharif</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Setar-e-Sahar</td>
<td>Shafiullah Azizi</td>
<td>CEO and owner</td>
</tr>
</tbody>
</table>
Twenty-nine media managers representing the Afghan media landscape (16 TV stations, 11 radio stations, and 2 websites) were interviewed over the course of 2 months by an international and a national consultant across five locations:
Kabul, Jalalabad, Herat, Mazar-e-Sharif, and Kandahar. The full list of outlets interviewed is catalogued in Table 1.

2.3 **Tools**

The media manager interview was guided by a questionnaire that focused on key points of interest, such as their objective and mission, content, evolution of the programming landscape, the audience, competition, ratings and advertisement sales, and trends in the Afghan media landscape.

The interview structure was an informal discussion that allowed for free discussion outside of the boundaries of the questionnaire, encouraging an open conversation on the general state of the outlet and the media landscape.

3. **Module 2: Ratings Survey**

3.1 **Objective**

Audience research data has been made available regularly since 2010. The research capacity to perform and distribute results of regular audience surveys was developed thanks to the USAID Afghanistan Media Development and Empowerment Project (AMDEP), and first results were published in August 2013. This module was undertaken as a new iteration of the survey, using the same methodology, to gather the most up to date audience figures.

3.2 **Polling Method**

The polling method utilized the same methodology as previous rounds. The survey was run from November 10 to November 23, 2014 and gathered data about media consumption between Nov. 09 and Nov. 22, 2014. The module was based on 3 steps:

- Verifying whether existing panel members were still willing to participate in the survey, updating some socio-demographic and general media usage information, and preparing panel members to monitor their media usage;
- Complementing the panel of respondents in order to ensure a sample as large as possible, with a target of 3,500 respondents;
- Calling each of the panel members three times over a period of two weeks in order to generate a target of 10,000 interviews.

The main characteristics of the methodology are:

- Respondents were a part of a panel of media users, aged 15 and above, living in all provinces of the country. A panel means that many of the respondents for this survey also responded to the previous two surveys;
• Respondents were recruited and interviewed over the phone, and their main socio-demographic characteristics were collected during recruitment;
• The panel was recruited randomly, by generating random phone numbers, with quotas per province;
• Each panel member was interviewed three times over a period of 14 days, and asked what they had watched / listened to the previous day.

During the audience survey itself, respondents were asked to list what station or channel they listened to or watched, at what time, and for how long (in minutes). A typical audience record for a respondent would then be, as in Table 2.

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Time</th>
<th>Type</th>
<th>Outlet</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1675</td>
<td>09:00</td>
<td>TV</td>
<td>Tolo</td>
<td>90</td>
</tr>
<tr>
<td>1675</td>
<td>10:30</td>
<td>TV</td>
<td>Tamadon</td>
<td>60</td>
</tr>
<tr>
<td>1675</td>
<td>11:30</td>
<td>TV</td>
<td>Haft</td>
<td>90</td>
</tr>
<tr>
<td>1675</td>
<td>13:00</td>
<td>TV</td>
<td>Khurshid</td>
<td>60</td>
</tr>
<tr>
<td>1675</td>
<td>14:00</td>
<td>TV</td>
<td>Tolo</td>
<td>60</td>
</tr>
<tr>
<td>1675</td>
<td>15:00</td>
<td>TV</td>
<td>Haft</td>
<td>120</td>
</tr>
<tr>
<td>1675</td>
<td>18:30</td>
<td>Radio</td>
<td>Neda</td>
<td>20</td>
</tr>
<tr>
<td>1675</td>
<td>19:00</td>
<td>TV</td>
<td>Tolo</td>
<td>60</td>
</tr>
<tr>
<td>1675</td>
<td>20:00</td>
<td>TV</td>
<td>Tamadon</td>
<td>60</td>
</tr>
<tr>
<td>1675</td>
<td>21:00</td>
<td>TV</td>
<td>Tolo</td>
<td>60</td>
</tr>
</tbody>
</table>

### 3.3 Sampling

For this iteration of the survey, 2,793 respondents agreed to be part of the survey, 2,371 unique respondents were interviewed at least once, and 6,165 interviews were conducted (on average, 2.6 interviews per respondent). Based on the number of respondents, this would give a margin of error due to sample size of ±2% for national figures, ±4.7% for figures given for Kabul province (438 respondents).
**Methodology**


table

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Aug-13</th>
<th>Nov-13</th>
<th>Nov-14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondents</td>
<td>3,081</td>
<td>2,603</td>
<td>2,371</td>
</tr>
<tr>
<td>Interviews</td>
<td>8,301</td>
<td>6,607</td>
<td>6,165</td>
</tr>
<tr>
<td>Int/respondent</td>
<td>2.7</td>
<td>2.5</td>
<td>2.6</td>
</tr>
<tr>
<td>Data points</td>
<td>15,586</td>
<td>13,817</td>
<td>12,915</td>
</tr>
<tr>
<td>Points per respondent</td>
<td>5.1</td>
<td>5.3</td>
<td>5.4</td>
</tr>
<tr>
<td>Margin of error (national)</td>
<td>1.8%</td>
<td>1.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Margin of error (Kabul)</td>
<td>4.3%</td>
<td>4.7%</td>
<td>4.7%</td>
</tr>
<tr>
<td>% female</td>
<td>22.0%</td>
<td>20.5%</td>
<td>27.0%</td>
</tr>
<tr>
<td>Provinces covered</td>
<td>34</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Districts covered</td>
<td>297</td>
<td>282</td>
<td>269</td>
</tr>
</tbody>
</table>

Figure 2: Respondents Age Pyramid

Section E will provide main results of the survey, but much more complete and detailed results are available at http://ratings.altaiconsulting.com.

### 3.4 Data Collection

The call-center, which was originally designed, constructed, and equipped for this purpose, was reused for this survey. The call-center uses a state-of-the-art Computer-Aided Telephony Interviewing (CATI) system to manage the campaign and record interview results. The system allowed all conversations to be recorded into audio files for complete traceability.

Fifteen phone operators, who had been trained in previous ratings rounds on how to perform quality checks and data cleaning operations conducted the newest ratings survey, with a supervisor to compile regular updates and track quotas.
3.5 **Challenges**

As with previous surveys, the main challenges were to reach the target number of interviews. The methodology was designed to be run quarterly, and it was anticipated that from one survey to the next, the panel attrition would reach about 10%. However, the previous survey was run about a year prior to this one, and when all previous panel members were called to verify if they were still willing to participate, only 1,544 agreed – most of the other could not be reached, probably because they had changed phone numbers.

As in previous recruitment phases, it proved difficult to recruit panel members with specific demographics: respondents in Zabul, Uruzgan, Nuristan, Daykundi, and particularly female respondents in most of the southern and eastern provinces were hard to find.

Finally, not all panel members who agreed to participate in the study answered our calls: about 15% of the verified panel members could not be reached during the survey.

4. **Module 3: Audience and Content Analysis**

To gain a **deep understanding of the TV audience perception and behaviors**, qualitative research was organized into three segments:
I. **Brand testing FGD**: FGD concentrating on an investigation into audience awareness, perception, and opinions of TV channels;

II. **Content testing FGD**: FGD conducted to assess the panelists’ perception of popular TV programs, and what makes these programs popular;

III. **Household consumption analysis (HCA)**: Journaling and FGD exercise aimed at understanding families’ patterns of TV consumption, and to investigate drivers of program selection.

The three qualitative segments were treated as complementary blocks of analysis (as seen in Figure 3) to help understand how audience preferences had shifted since 2010, and to add breadth to the ratings data.

This module aimed at adding breadth to the key findings of the ratings module by firstly addressing the questions raised over the consistently positive results for particular channels and programs, but by also identifying the key strengths of “second-tier” outlets and how the audience perceives them.

The three qualitative modules were also intended to represent a type of audience analysis that is very feasible for media managers themselves to carry out regularly in order to maintain a good understanding of their audience.

### 4.1 Focus groups

#### 4.1.1 Brand testing

**Objective**

The brand-testing module was designed to analyze the panel members’ perception of a variety of TV channels, their knowledge and perception of the most popular programs on these channels, and the rationale behind this popularity. The FGD sought to uncover not only what the outlet brands represent in the opinion of the panelists, but to discuss why they formed this opinion.

**Methodology**

These FGD used a brand testing/recognition approach. A number of approaches were used, such as word association and Chinese portraits, to understand the reputation of the outlets in the minds of the panelists. The ‘Chinese Portrait’ approach asks panelists to associate brands with animals, and to explain this association. This technique is based on a psychological approach, which helps to easily overcome barriers preventing free discussion around inanimate and foreign ideas such as values and traits of a brand. The level of awareness that panelists had about the different outlets and their program offering was also explored.
Panelists were asked about specific outlets (using a range of top-tier, second-tier and less popular outlets) and their perceptions of them.

4.1.2 **CONTENT TESTING**

**OBJECTIVE**

The same 18 panels that participated in the above-mentioned brand testing FGDs were then re-interviewed in a content testing exercise. This phase was designed to capture the panelists’ program preferences, and the strengths and weaknesses of a large range of programs, as well as information on potential areas of improvement for programming in Afghanistan.

By investigating the rationale behind the attractiveness of the most popular programs, this module sought to identify what was enticing audience members to certain programs, what was keeping them watching, and what was most successful in each genre of programming.

**METHODOLOGY**

In this module, the panels were exposed to short clips of the most popular programs broken up by genre (News, Drama, Entertainment, Women’s Issues, and Political Debate) and asked a series of questions on these programs, and on the genre of programming more broadly. The questions focused not only on the most popular programs themselves, but also more generally on the strengths of outlets in the genre as a whole.

Each program was cut to a short clip to serve as a reminder to the panelists of the programs, and questions were asked about the program in general, rather than about exactly what was viewed.

**CONTENT SELECTION**

The content was selected from the most popular programs in each category over a variety of channels. The selection process involved audience feedback, ratings data, and input from key media manager and media industry professionals. The resulting list of shows was then streamlined and turned into a final list by Altai teams.

4.1.3 **LOCATIONS**

The brand testing and content testing FGDs took place in three provinces: Balkh, Kabul, and Nangarhar, in the provincial center and surrounding areas of each province. In each location, a total of 6 brand testing FGDs were conducted.

---

1 With the majority of the FGD conducted in the provincial administrative center, and some not further than 30 minutes outside of this area.
4.1.4 **Sampling**

Table 4: Breakdown of brand and content testing FGD, by location and profile

<table>
<thead>
<tr>
<th>Location</th>
<th>Brand Testing</th>
<th>Content Testing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Literate, 18-30</td>
<td>Literate, 41+</td>
</tr>
<tr>
<td></td>
<td>Men</td>
<td>Women</td>
</tr>
<tr>
<td>KABUL</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>MAZAR-E-SHARIF</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>JALALABAD</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Total Participants: 48 | 48 | 48 | 144

In each location, a total of 6 brand testing FGDs and 6 content testing FGDs were conducted - 3 with men and 3 with women - according to the following parameters:

- Four participants between the ages of 18-30 who are literate
- Four participants above the age of 41 who are literate
- Four participants between the ages of 18 and 60 (mixed ages) who are illiterate
This led to a total of 18 brand testing FGDs (which encompasses a total of 72 respondents) and 18 content testing FGDs. The total number of participants across the 2 type of FGD is 144, with an even split across gender (See Table 4).

### 4.1.5 Data Collection

One senior national consultant was in charge of coordinating all of the fieldwork undertaken for this project. A female interviewer to accompany the senior national consultant was hired in each province, and was local to the area.

The senior national consultant was trained in Kabul and travelled to the provinces to train female interviewers on location, accompanied by an Altai consultant unless security concerns prohibited it. The senior national consultant was responsible for undertaking the majority of fieldwork, as well as accompanying female interviewers, on location, throughout interviews in which he could not undertake the interview himself.

### 4.1.6 Tools

All questionnaires were prepared in English, by a team of international consultants, with the input of national consultants and then translated into Dari. Translation was then checked by a Dari speaking international consultant to ensure the cohesion of the translation, and to guarantee the appropriateness of the language for the audience.

Draft versions of the tools were then piloted in Kabul and any required adjustments were made before interviewing was conducted in the field.

### 4.2 Household Consumption Analysis

#### 4.2.1 Objective

Throughout October and November 2014, 8 household consumption analyses took place. The HCA targeted concepts that were too expansive to be assessed in the brand and content FGD.

It sought to understand the patterns of consumption, why audience members spend so much time on particular channels or programs, and what might cause them to explore a different channel or program and thereby change their consumption patterns. The underlying premise was to better understand why certain programs and outlets are more popular than others, and what factors drive time spent in front of specific TV programs, as well as how the choice of a certain program is made in a household.
4.2.2 METHODOLOGY

This process involved a family recording their daily television viewing habits in a journal throughout each day, for a week. The week of journaling was planned for a time that would be reflective of a typical week of media programming.

Table 5: Example HCA Journal

<table>
<thead>
<tr>
<th>Start time</th>
<th>Program name</th>
<th>Channel name</th>
<th>Duration (minutes)</th>
<th>Who was in the room?</th>
<th>Who decided to change the channel to this show?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each night of that week, a consultant would call the family to collect the daily journal in order to capture as much fresh detail as possible. This involved collating the data they had recorded in the journal for that day, as well as asking more detailed questions such as:

- Who was in the room during each viewing period?
- What were those in the room doing whilst they were watching?
- Who changed the channel and why?
- Did they know what program they wanted to switch to or were they just browsing channels?

At the end of the week, a FGD was held with the family in their home. Based on the information gathered throughout the week from the household consumption journals, the FGD generated a discussion amongst the family on how and why they made their choices, and the habits that inform their viewing behaviors as individuals, and as a family.

4.2.3 LOCATIONS

Household consumption analyses were conducted with 4 families in Kabul, 2 families in Mazar-e-Sharif, and 2 families in Jalalabad.

4.2.4 SAMPLING

The sampling for the household consumption analyses was purposive and targeted a good range of ethnicities, urban/rural locations, different family compositions, levels of literacy and wealth (see Table 6).
### Methodology

#### Table 6: Sampling for the HCA

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Income</th>
<th>Location</th>
<th>Literacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pashtun</td>
<td>High</td>
<td>Urban</td>
<td>Literate</td>
</tr>
<tr>
<td>Pashtun</td>
<td>Medium</td>
<td>Rural</td>
<td>Illiterate</td>
</tr>
<tr>
<td>Pashtun</td>
<td>Low</td>
<td>Peri-urban</td>
<td>Literate</td>
</tr>
<tr>
<td>Tajik</td>
<td>Low</td>
<td>Urban</td>
<td>Illiterate</td>
</tr>
<tr>
<td>Tajik</td>
<td>Medium</td>
<td>Rural</td>
<td>Illiterate</td>
</tr>
<tr>
<td>Tajik</td>
<td>Low</td>
<td>Peri-urban</td>
<td>Literate</td>
</tr>
<tr>
<td>Uzbek</td>
<td>High</td>
<td>Urban</td>
<td>Literate</td>
</tr>
<tr>
<td>Hazara</td>
<td>Low</td>
<td>Rural</td>
<td>Literate</td>
</tr>
</tbody>
</table>

#### 4.2.5 Data Collection

Two senior national consultants were responsible for undertaking the fieldwork for the HCA, with one responsible for HCA in Kabul, and the other for work in other provinces. They were both trained in Kabul. One female interviewer to accompany the senior national consultant was hired in each province, and was local to the area.

The senior national consultants were responsible for keeping track of the journaling, by calling the families each night to record their responses. At the end of the week, the FGD were undertaken by a senior national consultant and an accompanying female interviewer, with an Altai consultant present when allowed for.

#### 4.2.6 Tools

Due to the nature of this module, the tools used for the FGD were flexible to ensure they remained relevant to each family. The tools included:

- A daily journal for the family to record their viewing choices and behaviors;
- A more in-depth journal for the consultant to record the information collected when calling the families each night;
- A FGD discussion guide in which a number of themes were first identified for exploration, and was then specifically adapted to be relevant to the information provided in the week-long journal.

The discussion guide was modified at the end of the week-long journaling according to the information gathered from the journals, to ensure the most relevant and specific questions were discussed.
All questionnaires were prepared in English, by a team of international consultants, with the input of national consultants and then translated into Dari. Translation was then checked by a Dari speaking international consultant to ensure the cohesion of the translation and to guarantee the appropriateness of the language for the audience.

Draft versions of the tools were then piloted in Kabul, and any required adjustments were made before interviewing was conducted in the field.

4.2.7 CHALLENGES

Difficulties arose with retaining families throughout the entire week of journaling, with one family replaced after a number of family issues arose, indicating that their journal would not be reflective of an “average” week.

Another complexity was the affect family dynamics can have on the FGD. It was witnessed that in one of the family discussions, opinions may have been tailored to suit that of the father’s choice. However, as television is watched in a family unit, these choices were considered reflective and true of actual viewing behaviors.
C. THE MEDIA INDUSTRY IN AFGHANISTAN: TEN YEARS OF RESEARCH AND ANALYSIS

BY 2004, LITTLE RESEARCH HAD LOOKED INTO AFGHAN MEDIA USAGE AND ACCESS TO INFORMATION. HOWEVER, SEVERAL (LARGELY URBAN) MEDIA LISTENER SURVEYS HAD BEEN CONDUCTED, AND THE SECTOR WAS EXPANSIVELY DOCUMENTED BY INTERNET.

COMMERCIAL ADVERTISING REVENUE STEMMING FROM THE DEVELOPMENT OF COMPETITIVE PRIVATE TELECOMMUNICATION AND BANKING SECTORS SUPPORTED RAPID EXPANSION OF THE SECTOR, AND INFORMED THE NEED FOR AUDIENCE DATA.

THE FIRST LARGE-SCALE MEDIA SURVEY WAS COMMISSIONED BY USAID AND CONDUCTED BY ALTAI CONSULTING IN 2004-2005. IT CONCLUDED THAT THE AFGHAN MEDIA LANDSCAPE WAS FAIRLY ELABORATE; THAT AFGHAN MEN AND WOMEN WERE AVID MEDIA USERS; THAT RADIO HAD A PROMINENT ROLE IN THE COUNTRY, WHILE TV WAS ESSENTIALLY RESTRICTED TO URBAN AREAS; AND THAT MEDIA HAD AN IMPORTANT ROLE IN THE AFGHAN SOCIETY, AND WAS EXPECTED TO BE MORE SO IN THE FUTURE.

IN 2010, ALTAI CONSULTING CONDUCTED A WIDE SPECTRUM RESEARCH FOR USAID ONCE AGAIN. AMONGST MANY FINDINGS, IT OBSERVED THAT THE SECTOR HAD BECOME PROFITABLE, AND THAT TELEVISION HAD STARTED TO REPLACE RADIO AS THE MOST CONSUMED MEDIA TYPE IN MANY URBAN CENTERS. IT ALSO REMARKED THAT MEDIA OUTLETS AND ADVERTISERS HAD VERY UNCERTAIN KNOWLEDGE OF THEIR AUDIENCE, AND MEDIA PLACEMENT WAS FAR FROM RATIONAL. THE RAPID GROWTH WAS ALSO DEEMED UNLIKELY TO BE SUSTAINABLE.

USAID THEREFORE INCLUDED COMPONENTS AIMING AT INCREASING THE SUSTAINABILITY OF OUTLETS INTO THEIR PROGRAMMING, INCLUSIVE OF REGULAR AUDIENCE RATINGS RESEARCH. THIS RATINGS RESEARCH, INTENDED TO BE PUBLISHED QUARTERLY, WAS EVENTUALLY RUN FOUR TIMES.

At the collapse of the Taliban regime in November 2001, independent media in Afghanistan consisted exclusively of foreign efforts broadcast from abroad, and public media was limited to Radio Kabul, then renamed Radio Shariat, and exclusively used as a propaganda tool. In October 2001, the first media law was ratified, allowing any Afghan citizen to launch an independent publication.

From January 2002 onwards, the sector started to rebuild with the support of a number of international donors including USAID and OTI, DFID, the European
Commission, UNESCO and others; and through the efforts of media development NGOs including Internews, IMPACS, Media Action International, Aina, IWPR and Afghans for Civil Society; as well as numerous Afghan NGOs and the work of independent initiatives.

1. 2002-2004

In the summer of 2004, after a large investment in media development in the previous two years, the most cited and one of the only published documents on access to information and media usage in Afghanistan was a short case study of vulnerable Hazara women’s access to the media in a remote mountainous region of Samangan province. The study concluded, “while half of the households surveyed owned radios, women reported that broadcasts were too difficult for them to understand and hence only 12% listened to the radio. Linguistic barriers, the positioning of the radio set as part of the “man’s world,” and lack of relevance of radio programming were major factors in low listening patterns of women.”

However, several media listenership surveys had already been conducted, albeit in more urban settings. Kamal mentions that Media Support Solutions performed a thorough survey in Balkh province in 2002. In 2003, a rapid survey conducted by Internews on Kabul men found that “two new independent Afghan radio stations have taken the streets of Kabul by storm—capturing over 80 per cent of the market—leaving Afghan state broadcasting, the BBC and VOA with much smaller shares.” The radio stations in question were Moby’s Arman FM (63% audience share) and Killid (18%). Another Internews-led survey in Kunduz (2004) found that the townspeople listened to as many as 21 radio stations, with Radio Azadi leading the listenership (30%).

The sector itself was more expansively documented: in September 2003, Internews began publishing the Media Monitor newsletter, and published the first Afghan Media Directory in March 2004, which provided detailed information about media development NGOs and projects, and an extensive list of print media, a summary of past reports, as well as biographies of, and interviews with, prominent media players. A previous GIS analysis, also run by Internews, had allowed estimates of broadcast area and covered population to be computed for a large number of radio stations. Finally, and most prominently,

---

2 Kamal, S. Disconnected from Discourse, Women’s Radio Listening in Rural Samangan, Afghanistan, June 2004
3 Internews, Independent radio takes Kabul streets by storm, November 2003
the Aïna NGO published in May 2004 a very comprehensive directory of media organizations for all provinces in the country. To conclude this situation analysis, a large-scale media survey, commissioned by USAID to understand the impact of its numerous media development initiatives, was conducted between September 2004 and March 2005 by Altai Consulting (for Internews and USAID/OTI). This research had two objectives: to document more extensively the media’s availability, consumption patterns, comprehension, trust, perceptions and interactions with other sources of information; and to evaluate Internews’ community radio stations network. The study covered 15 provinces and included urban, semi-urban and rural areas. The survey concluded that the Afghan media landscape was already fairly elaborate; that Afghan men and women were equally avid and intensive media users; that radio had a prominent role in the country, while TV was essentially restricted to urban areas (37% of the population used TV); and that media had an important role in the Afghan society, not only for information or entertainment, but also for education, and was expected to take an increasing role in the future. The survey did not assess audience share, but identified the most self-declared used radio stations as the BBC, Azadi and Radio Afghanistan (used by 75% of the population) throughout the country, as well as Arman FM as the leader within its (urban) broadcast area. The most watched TV channel was RTA, followed by Iranian channels (through aerials on the border and on satellite and cable), then Ayna TV.

2. 2004-2010

The 2002-2004 period thus saw an intense development of the print media, for a large part the result of Afghan organizations and private individuals, and of the radio, with the assistance of international organizations. While donors were still involved in subsequent years, the driving force of media development was largely advertisements; either commercial or public service announcements. On the public announcement side, the 2004 presidential elections and the early voters’ registration campaign brought important revenues to the sector, with the 2005 parliamentary elections doing similarly. During the same period, the international community spent large amounts on counter-narcotics campaigns.

---

5 Aïna, Afghanistan’s Media Landscape, Peering into the Provinces, May 2005
6 Altai Consulting, Afghan Media, Three Years After, Media and Alternatives Sources of Information in the Afghan Society, March 2005
Commerically, the rapid development of private telecommunication companies was accompanied by a sizeable demand for advertising space and expenditure. As new competitors emerged in the mobile phone market, this demand subsequently increased year after year. After a few years, the banking sector also provided a large income revenue source to the sector. This led to the **ceaseless creation of new media outlets, at an incredibly rapid pace.**

**Figure 4: Number of active media outlets, 2002-2010**

The development of the advertising sector, taken in consideration with the increasing complexity of the sector, necessitated improved knowledge of both the sector and the audience. Advertising and media placement agencies were thus created, and in at least one case, a large advertiser asked its agency to perform regular monitoring of ads placed in the media and yearly audience research, in order to maximize media placement effectiveness.

At the same time, **donors not only funded messaging campaigns, but also the production and broadcasting of entire programs – even serials.** Research to evaluate the impact of their programs was therefore needed. Hence, while a large amount of research on the media and the audience was conducted during the 2004-2010 period, most of it was kept private. A rapid research done in 2011 (see below) showed that many media and advertisers relied on The Asia Foundation's yearly *Survey of the Afghan People*[^7] for media usage and preference data.

### 3. Since 2010

As USAID was preparing a new wave of media development activities, Altai Consulting was once again asked to conduct a wide spectrum research[^8] that

[^7]: Started in 2004, the survey includes questions about equipment, usage of media, most used sources of information, and (in some of the surveys) preferred media outlets. As such, it does not provide audience share information. The last survey is available at [http://asiafoundation.org/country/overview/afghanistan](http://asiafoundation.org/country/overview/afghanistan)

included a complete review of the media sector, actors and economy, an analysis of main content broadcast, and a new assessment of attitudes, behaviors and expectations of Afghans towards the media. It also involved the first completely public, national audience research in the country. Among many results, the study observed the remarkable growth of the sector in the previous few years; that the sector had become a profitable industry with advertising revenue of about $50m per year. Compared to 2004, television had started to replace radio as the most consumed media type in many urban centers. The largest TV audience share was captured by Moby media (45% for Tolo, 6% for Lemar), with Ariana in second position (19%). The audience on the radio was much more fragmented than in 2004, with the top 5 stations (RTA, Azadi, Arman, the BBC and Ashna) capturing 50% of the audience share, and the rest shared among more than 100 other stations. The study also remarked that while the sector had very rapidly become more complex and professional, media outlets and advertisers had very uncertain knowledge of their audience, and media placement practices were still far from rational.

It became apparent that such rapid growth of the sector was likely to be unsustainable, particularly considering the disengagement of foreign forces, and the possible reduction of foreign civilian assistance.

4. Focusing on Audience Research

Following the conclusions of the 2010 research, and the publication of ratings data, USAID included in the design of the Internews-led Afghanistan Media Empowerment and Development Program (AMDEP) components aimed at increasing the sustainability of existing outlets. To this end, media managers were trained in conducting their own qualitative and small-scale quantitative audience research, in order to better know their audience. The program also included the development and publication of regular audience ratings research.

For the most part, media managers and advertisers had relied on very generic data about preferred or most used media outlets, or in rare cases program types. A rapid market research conducted in 2011 showed that the sector would welcome, and could probably sustain, regular ratings research, aiming at providing detailed information about media consumption such as: what percentage of a given population watches a particular program at a particular time of the day. Large and small outlets alike considered it could help them understand their audience and prove their position in the market, while
advertisers understood it could be a tool to rationalize their media placement practices.

**Such ratings data, initially intended to be published quarterly, were eventually run four times** (once as an unpublished pilot) the last three of which were conducted in August and November 2013, and in November 2014. Despite a wide consultation about the methodology with main actors in sector, the first published data (August 2013) generated a lot of criticism from a few media managers, who felt the results were not representing accurately their perception of the Afghan audience. While results of that research were perfectly consistent with other, unpublished data, the fact that such results were made accessible to the whole sector was seen as a threat by actors who had often claimed larger audience shares than they actually had. Long discussions with main actors in the sector ensued; and another methodology was proposed and tested (December 2013), with similar results. It became quickly apparent that the current structure of the Afghan sector, with many outlets that do not essentially rely on advertisements, and one predominant media group capturing about 2/3 of the audience⁹, was going to make sustainability of a ratings service difficult.

### 5. Conclusions: Current Trends and Future Areas of Opportunity for Research

Media research is a vast field, and while large parts of it have been covered in the past decade in Afghanistan, much remains to be looked at in detail. The shift in attitudes and expectations of the Afghan population towards the media that accompanied the post-Taliban media sector burst has been broadly portrayed; current media consumption patterns of Afghans are relatively well known; and many topics important at specific times of the country’s development were explored, such as media vs. other sources of information, female access to the media, perceptions of media with a political agenda, expectations of the youth, economic sustainability, the role of media in promoting engagement in civil society, the impact of media on the electoral process, media laws and free speech, etc.

More recently, as mentioned above, an important effort was dedicated to assist media outlets in understanding their audience, with a goal to improve their sustainability. There is still a large effort to be done in this direction: **most media still have to be convinced that they need to know their audience**, and while the current ratings data is fairly informative, it is insufficient in many regards. It is

---

⁹ For further details, see Ratings Data in Section E below.
not updated frequently enough for the largest media who would prefer rapid Return On Investment analyses, and would like to capture results of experiments in near-real-time; and it is not deep enough for smaller outlets to be able to understand the structure of their core audience group. Setting-up people meters might be the only way to address both issues, but is a very costly solution that barely starts being technically feasible in Afghanistan.

In addition, to really understand audience patterns, analysis must be done by program, or at least program type, which can only be done if broadcasted content is systematically recorded and analyzed. Media monitoring services exist, and should be coupled with audience research, but they do not yet offer systematic qualitative content analysis.

In the very near future, it is expected that the introduction of Digital TV will yield important changes to the media sector, which will need to be monitored closely over the next few years.

Politically, the next parliamentary elections will be the first ones held in a context of limited foreign intervention, and could very well be the starting point of a new era for Afghan politics, with the media serving as a platform to discuss and promote such changes. How are Afghan media equipped to fulfill this role? What can they bring to the public debate?

On the longer term, media accompany and often shape changes in the society. While Afghan culture is in many respects conservative and reluctant to change, early media research showed that most Afghans thought the media should bring much needed societal changes. Future research should try and document the long-term interactions between media and Afghan culture.

The media sector has dramatically changed in the past decade, and is likely to change further still in the subsequent one. The development of the country, and better access to infrastructure and resources give increasing number of Afghans access to a much more complex offer, while new technology can lower barriers to entry in the sector for small actors. Very soon, the transition to Digital TV will still increase this complexity, and favor the development of more targeted media, a trend already witnessed in the past years, with channels dedicated to sports or cinema being created. While still very low, Internet access is increasing thanks to the development of infrastructure (fiber-optics backbone, 3G networks), the availability of cheaper terminals and the increase in literacy. Consumption of online resources as sources of information, education and entertainment is already growing, and will need to be monitored more closely in the coming years.
The increasing complexity of communication channels and consumption patterns, and a growing importance of alternative media in parallel to the continuous development of mainstream media will make the sector much less easy to understand, and will generate the need for more targeted media research. To undertake this, there will be a need to further develop the dedicated social research capacity in Afghanistan, possibly through the introduction of media research programs in Afghan universities.
D. AFGHAN MEDIA OUTLETS IN 2014: CONTENT, POSITIONING AND PROGRAMMING STRATEGIES

- A number of challenging political, economic and security events characterize the 2014 media sector. Uncertainty propelled by the lengthy presidential election process froze investment and decision-making in companies, and the withdrawal of foreign troops bore fears of decreased donor support.

- The sector has witnessed increasing professionalization, and a certain degree of segmentation with the introduction of specialist, niche channels.

- The pace of development of new outlets has slowed, reflecting the challenging environment, increasing competition, and signs of a maturing market: Since 2010, an average of three TV channels were created each year, as opposed to the average nine that were created each year in the four years earlier. The radio sector, representing around 250 channels, appears to continue on a trajectory of rapid growth.

- The Internet, whilst remaining a relatively small player in the media scene, has witnessed dramatic changes in its usage, marking a growing importance for certain portions of Afghan society. In particular, this was witnessed in its use as a tool of democratic expression throughout the elections.

- Self-censorship amongst the outlets appears to remain an inherent issue, accepted as the norm. Media law remains fairly stagnant, with the random, unregulated intrusion of the government into media affairs.

- Some TV media outlets are struggling to define their positioning, unclear about how they can best use this to strategize and attract audience.

- The programming scene looks much like that of 2010, with the exception of the introduction of a high level of sports programming.

- Production remains split, with national production of some key genres, and a high level of international procurement of others, done so by a variety of means, largely illegal. Whilst a desire for increasing internal production remains, the financial, social and political constraints have made it difficult.

- Whilst strategy use amongst the sector appears to be increasing, many outlets still lack audience data, a pivotal source of information to help transition into a more self-sustainable model.
1. Introduction: Afghan media sector in 2014

As has been consistently reported over the past 12 years, the Afghan media sector is characterized by unprecedented growth, expansion and dynamism. The difference in the media scene couldn’t be starker from 2001, when Afghan media consisted solely of the state broadcaster. Whilst this vibrancy continues, four years on from the last evaluation of the sector in 2010, media managers are naturally reporting a number of key changes in the media scene.

Television has continued to overtake the role of radio amongst urban dwellers, with those that we spoke to indicating that TV was their most important media source, by far surpassing their time spent reading press or listening to the radio. Of those interviewees who reported that radio-use still makes up a part of their media consumption, it was largely men who listen to the radio in their place of work. One respondent who characterized these responses, noted, “Those who listen to a lot of radio do so because of their job” (Male, 18-30, Mazar). It can also be said that rural, isolated people living outside of terrestrial TV / FM broadcast areas are likely to be mainly listening to the radio. Whilst we typically don’t have information about these groups, their numbers are not insignificant in a country such as Afghanistan. Whereas in some cases they may use satellite TV (when they can afford a TV set, a satellite dish, and a generator), for the others, the use of radio is likely to remain their predominant media source.

Estimations on the value of the current media market are exceptionally difficult, with the opinions of industry leaders estimating the total advertising revenue for the sector to be around $70m - $80m USD a year.

A difficult economic situation is sustaining a lot of uncertainty, with a number of simultaneous political and societal events precipitating this uncertainty. These include the slowing down of the annual growth rate, as well as the increasing departure of internationals and expatriates. This withdrawal is generating a high level of fear over decreasing international support, which has been key to the development of the Afghan media industry in the past.

Both of these issues ran concurrently with the presidential election process in 2014, which froze investment and decision-making in companies whilst they await the stability of the country.

---

The presidential elections were held in April 2014, followed by a second round in June 2014. The results were heavily contested, with allegations of fraud that saw the country deadlocked into months of political stalemate. In September 2014, a power-sharing deal was forged between the two contenders, and the President was inaugurated. This period of uncertainty, preceded by the tension in the run-up to the elections, was thought by media managers to have had an effect on investors’ trust in the Afghan market, thereby affecting the advertising revenue base. However, some of the effects of these restraints might have also been offset by the revenue generated by the Public Service Announcements and advertising campaigns made on media throughout the election.

**Security was a large issue for the media in 2014**, and a particularly deadly year for news media personnel. A reported eight journalists were killed in Afghanistan in 2014, with other cases of reported violence against Afghan journalists up 64% from 2013.\(^{11}\) With more than 40 journalists killed in Afghanistan since 2001, Abdul Mujeeb Khelwatgar, the executive director of Nai,\(^{12}\) considers that the impunity of the killers throughout this time has led to “the people behind the killings and violence against journalists brave enough to think they could do anything against journalists.”\(^{13}\) The improved capacity of national journalists, which has led to an increase in investigative reporting on, for example, government corruption, was also seen by Khelwatgar as contributing to the attacks, which, according to Nai, are more probable to come from pro-government than antigovernment forces. Journalists have reported a menacing trend of increasing violence and intimidation, with a failure by the government to support press freedom, or to investigate the threats and violence the media are facing.\(^{14}\) This is a particularly worrying trend that threatens the progress achieved in attaining media freedom in the country.

**The decrease in paid programming is also a significant change in the landscape**, with media managers noting, “Donor money has decreased” (Shamshad) and more specifically, Sharq Radio noted that for their outlet, “paid programming stopped at the end of 2013.” Haft TV also reported a breakdown of “100% private advertisers,” a noteworthy departure from 2010 when a majority of

---


\(^{12}\) Nai is an Afghan NGO established with the mission of building and supporting a strong and independent media sector in Afghanistan, for more information, see: [www.nai.org.af](http://www.nai.org.af)


\(^{14}\) “Stop Reporting or We’ll Kill Your Family”, Human Rights Watch, 21 January 2015, [http://www.hrw.org/node/131602](http://www.hrw.org/node/131602)
outlets had some portion of their revenue collected from paid programming. The decline of paid programming will no doubt be a difficult transition for some media outlets, which have significantly relied on this form of funding. However, the elimination of this practice, whereby outlets are paid to broadcast a program by donors, should be considered a positive movement for the industry at large. Such a practice has artificially inflated the sector, allowing for a number of media outlets to exist without consideration of advertisers, or their audience. The curtailing of this behavior will lead to a more efficient market, where outlets will be pushed to compete for commercially-driven advertising funds, in turn resulting in a better service for the audience.

However, despite a general idea circulating that donor money has disappeared, paid programming still exists for some media outlets, and continue to make up a significant proportion of their funding. Baran, for example, reported, “20% of our content is made up of paid programming,” and Rabia Balkhi shared, “25% of our programming is Salam Watandar.” Similarly, Faryad indicated, “40% of our revenue is paid programming from NGOs.” Other TV stations report that 10%, 20%, and as low as 1% of their programming was English paid programming.

These challenges and pressures have generated an increasingly competitive market for media players, who are confronted with the challenge of remaining sustainable in a bloated media environment. As Shamshad noted, “Total annual business for media from domestic sources could be $30 million tops, everyone will have to find their part in this. They are now considering how to survive on their own.”

As a result, media managers reported an increased push to professionalize, as well as an emerging segmentation of the industry, with quality of the content rising to the demands of an increasingly sophisticated audience. The arrival of niche-focused newcomers is seen to be at once a catalyst for this segmentation, as well as a reflection of perhaps a need for such niche-focused strategies to be competitive in the current market. Simultaneously, media managers noted that they must be more strategic to remain competitive in the market, with youth in particular emerging as a key strategic focal point. This is of course, balanced by the fact that many of the outlets do not depend on advertising for their survival, due to other sources of revenue. For example: Ariana, owned by the Afghan Wireless Communication Company; Yak, owned by Fahim Hashimi, an Afghan

---

15 Salam Watandar, originally an Internews-supported initiative, is now a fully independent radio station broadcasting and transmitting from Kabul. Salam Watandar Radio Service provides content to a network of Afghan-owned and operated radio stations. Salam Watandar supported stations must broadcast at least four hours of their content everyday.
Afgan Media Outlets in 2014: Content, Positioning and Programming Strategies

entrepreneur who owns a business conglomerate with a variety of interests; and Ayna, owned by the current Vice President General Dostum.

Despite this year’s report, which indicates signs of a nearly saturated market, through a slowing down of the massive growth of the sector witnessed in the past, optimism amongst the industry generally remains high.

Alongside these changes, a number of crucial challenges remain to building-up a sustainable sector beyond 2015. These changes and challenges will be discussed in greater detail below.

1.1.1 Television

The Afghan TV scene in 2014 is built on an environment characterized by similar traits to that in 2010. It is estimated that there are approximately 100 TV channels currently airing in Afghanistan, with at least 15 new channels created since 2010. One hefty player continues to dominate and accrue a large portion of the audience share. On average, receiving 49.8% of the national audience share, Tolo, renowned for the quality, innovation and modernity of their programming, remain firmly ensconced as the leader in terms of market and audience share.

After Tolo, there is a second tier of TV channels who manage to capture a solid amount of audience share amongst them, individually ranging from 1.5% to 9.7%, and in total accounting for a large 33% of the audience share. The second tier players include: Lemar (9.7%), Khurshid (8.5%), Ariana (5.6%), RTA (2.9%), Shamshad (2.2%), and Yak (1.5%).

These second tier outlets are characterized by competencies in certain areas. Whilst unable to compete with Tolo nationally, when disaggregating the audience data according to specific regions, timeslots or demographics, second tier outlets often demonstrate an increased share of the audience. These increases could be reflective of the second tier outlets’ niche positioning, affording them strength, for example, in a particular region, or with a specific group of the audience.

---

16 Estimates on the number of channels and radio stations should be read with caution, given the regular changes in the industry, and the limited resources offering a benchmark.
17 These figures are sourced from Altai’s ratings survey, 2014, and have a margin of error of ±2%, due to the sample size.
For example, Shamshad’s national average audience share is 2.2%. However, when considering their audience share in their key markets of the eastern provinces of Nangarhar, Paktika and Kunar, we can see their audience share rises to 17%, placing them as the third contender within this region, behind only Tolo and Lemar. This is reflective of the effect targeting a niche audience, such as the conservative Pashto-speaking community, can have on ratings data.

If we look at Lemar as another indication, we can see their audience share shifts quite dramatically when disaggregating the national data by age. Nationally, they have an average audience share of 9.7%. However, amongst 15-34 year olds, we see an increase, capturing 10.3% of this portion of the audience, indicative of their strength amongst the youth audience. Amongst this age group, their popularity sees a large spike at 11am and, another at around 20:00. At this time, Lemar are broadcasting ‘Da Mini Diwah,’ an Indian series, firstly broadcast at 20:00, and then repeated at 11am, clearly attracting significant popularity amongst the younger viewers.

There then remains a group of other outlets who are neither first nor second tier, and who in this report will be referred to as “The Others.” Taken as a group, these players individually receive less than 1.5% market share each, and in total make up 17.2% of the total national audience share.

These outlets are typically made up of small local channels, such as Arezo (0.9%), a channel based in Mazar-e-Sharif and especially strong in the North-Eastern provinces; or channels that are highly specialized in a particular niche, such as Haft TV, a channel concentrated on broadcasting movies. Outlets who are owned by political or religious leaders also fall within this category, with an audience base largely motivated along ethnic or religious lines. This includes channels such as Ayna (0.4%), owned by the current Vice President General Dostum, whose audience-base is largely concentrated amongst the Uzbek population in the Northeastern provinces.

1.1.2 RADIO

With around 250 radio channels across the country, the radio sector remains active, despite a decrease in their relative importance to Afghan lives, and the therefore declining audience numbers. Increasing access to electricity across
the country tends to fuel increased television consumption, often at the expense of radio consumption.

However, radio remains significant to particular segments of the market, in particular men, who often listen to the radio during their workday, as well as when they travel to and from the workplace. For this group, radio provides the critical role of providing news coverage throughout their day. Large portions of the country remain without access to television, principally those in remote areas with unstable, or no electricity sources. For these regions, we can suppose radio remains a highly pertinent access point for information and media. Women in these regions may make up another key user group, listening throughout the day as they do the household work.

There was also a trend amongst younger males indicating that they listen to the radio when travelling to work, largely on their phones. For example, young males indicated, “when I am free I listen to music, entertainment and social programs on my mobile” (Male, 18-30, Kabul), and “I only listen to the radio for music on my mobile” (Male, 18-30, Mazar). Many radio-listeners indicated that they used it solely for music on their mobile; an interesting trend away from the news and information based broadcasting that categorized the past.

Radio also continues to be of great importance in the provision of a few key services. Throughout the country, radio is playing an increasing role in holding the government accountable, by offering an opportunity for the people to be heard, and going directly to the government for a response. For example, ‘Safay Shaheer’ (Cleaning the City), a radio program on Arman, allows callers to air their concerns, with the presenter often directly contacting the relevant authorities to seek a response. These types of direct, audience-fuelled investigations appear to be very successful amongst radio programs, garnering both the instantaneous support and the power to instigate a reaction, and with the results aired live to the audience. Safay Shaheer is known for having an exceptional response, with government members compelled to respond given the large audience following of around 15% audience share from 7-8am on an average day.¹⁸ This role that radio can play in helping the country to progress was keenly noted by Salam Watandar, sharing that they saw media, and their radio network, as having “a huge responsibility to the people to play a more important role, through education, bringing transparency, and building the confidence of the people in their institutions.”

¹⁸ Safay Shaheer is aired from 7-8am, Saturday to Wednesday.
These factors, along with the relatively thin budget required to maintain a radio station can provide radio outlets with greater flexibility, particularly when some are still benefitting from public service campaigns. For example, Baran radio outlet reported 50% of revenue stemming from NGOs, and Killid that 30-50% of their revenue continues to be made up of NGO advertisements.

1.1.3 Internet

Internet is still a marginal player in the Afghan media scene, due to a combination of high levels of illiteracy, and very low Internet penetration rates. However, a growing youth market who are connected via mobile phones and at places of study are contributing to an increasingly important Internet sector. This is also being propelled by the introduction of 3G to the market in 2013. According to the Ministry of Communication and Information, 8% of the Afghan population is estimated having access to the Internet, projected to represent more than 15% the next few years. More significantly, however, the ways in which the Afghan market uses the Internet has changed dramatically in the past four years.

Firstly, the Internet appears to be playing an increasing role in providing news services to working men, with one interviewee sharing that “I now get almost all of my news on Facebook when I am in the office. Most people in offices do this as they are in front of the computer all day” (Male, 18-30, Kabul). In an office situation, where men may have restricted access to news from other media sources, the Internet provides an easily accessible, instantaneous connection to events throughout the day. This also corroborates past findings on internet consumption; specifically, that it is mainly the young urban elite that work with the international community, or in office environments, that tend to have access to the Internet and thus become active users.

---

One of the most evident changes in the Internet market however is the increasing sophistication of users, most evident throughout the 2014 Presidential election. Facebook, Twitter and other social media were used throughout the election process with social media campaigns initiated by activists and youth encouraging voter turnout. A number of other online resources were designed and used to foster the democratic process. For example, a pro-democracy campaign was spread online, using the slogan “Yes, I will vote,” and a number of other web-based initiatives arose to encourage election interaction. These included a website developed to allow users to find the nearest polling center; or Paiwandgāh, a citizen journalism platform developed by ‘Impassion Afghanistan’ which allowed Afghans to report campaign security issues or concerns, share campaign promises and voting experiences. Paiwandgāh is still used, and was designed to allow “Afghans all over the country to connect and contribute to the national dialogue about the most important issues facing the nation. Using Paiwandgāh, all citizens will be able to send in stories, opinions, and personal experiences through a call, SMS, or social media.” Visiting the site shows a stream of recent reports on insurgent activities, demonstrations and critiques of the government.

Civil society groups set up online competitions and campaigns to engage youth voters. For example, a presidential election anthem contest was set up, with the mission of the contest to find an Afghan voice that encapsulates the voice of the youth, with the message, Participation in the elections is cool!” Based on the ‘Rock the Vote’ campaign during the 2008 US Presidential elections, contestants in the Sola competition had to write their own lyrics and perform it over the

---

20 http://www.votehere.af/
21 Impassion Afghanistan is Afghanistan's first digital media agency
instrumental tracks provided. After submission, finalists were selected to compete on Tolo TV.\(^23\)

During and after the election, users shared images of their participation to further encourage voting, and **Twitter in particular was used to share reports of fraud or intimidation.** For example, Twitter users posted comments promoting protests being held against Afghan election fraud and shared audio videos of officials allegedly planning electoral fraud.\(^24\) This process served to amplify their voice and reach, and as this demonstrates, Afghans using social media as a means to add their voice and demands to institute accountability within the country.

Throughout the standoff between the two contenders, a high level of social debate, critique and often violent and abusive commentary was also spread online, eventually sparking fears that it could incite retributive violence. The online disputes between rivals, perhaps fuelled by the anonymity afforded by the Internet, arose so much concern that the Afghan National Security Council even discussed banning Facebook throughout the political stalemate. Speaking to the Agence France-Press in July 2014, the deputy presidential spokesman, Fayeq Wahedi, explained, *“There are people on Facebook who spread hatred and cause damage to national unity, but after talks the council decided not to ban Facebook.”*\(^25\)

**The use of social media by the Taliban** has also had some in the media calling for tighter restrictions. Fahim Dashty, Chief Executive of Afghanistan’s National Journalists Union, commented in December 2014, *“We will be calling on the new president, Ashraf Ghani, to consider blocking the sites that Taliban use for their publicity”* \(^26\) in a joint press statement with Nai,\(^27\) coming in response to an increasing number of Taliban attacks in Kabul. These two examples indicate how far the progression of the Internet has travelled in recent years, so much so that

\(^{23}\) [www.sola.af](http://www.sola.af)


\(^{27}\) Nai is an Afghan NGO established with the support of Internews, with the mission of building and supporting a strong and independent media sector in Afghanistan, for more information, see: [www.nai.org.af](http://www.nai.org.af)
the content and messaging being spread online is considered an issue by governing bodies because of its potential effect on society.

Messaging and intent aside, what these examples show is the growing importance of the Internet for certain groups of Afghan society. In particular, the role of the Internet in contributing to the vibrancy of the democratic process was highlighted, providing a space for open and free discourse.

1.2 Trends, Changes and Challenges: The Media Since 2010

1.2.1 Pace of Development

There are now approximately 15 new TV channels in comparison to 2010. The pace of growth appears to be rapidly slowing down for TV outlets, with an average of three created each year since 2010, as opposed to the average of nine that were created each year in the four years earlier. This could largely be attributed to the exhaustion of the current bandwidth, but is more likely linked to the economic concerns, and the pressures that are compelled by a maturing industry, as was predicted in the 2010 Altai report where it was noted that it was unlikely that all of the many media outlets created could survive in the long term.

As was indicated by Shamshad, the market is changing, “Many stations were established with donors for specific purposes, and many were established as publicity for warlords and drug dealers. Television became easy money. Most of these stations will not survive the next few years.” Whereas once the goals of donors and other actors may have supported the existence of such media, they will now increasingly have to concentrate on forging their own existence. With expansion and growth being supported solidly over the past years, the changes in the industry are marking out a new environment in which media outlets cannot simply survive as a result of just existing. Instead, they will require strategic and audience-based reflection in order to sustainably compete.

In comparison to 2010, there are now approximately 75 new radio stations. With an average of 19 radio outlets created each year since 2010, the radio sector, representing around 250 channels, appear to continue on a trajectory of rapid growth. However, radio managers are reporting a very difficult working environment. Jawanan, a radio outlet from Kabul, noted the media landscape is changing dramatically, “many radio [stations] have disappeared, and there is a decrease of staff and number of transmitters.” Radio managers were reporting a stringent environment in which funding is very scarce.

---


29 Similar to the trend seen in 2010, with on average 20 radio stations created each year since January 2006.
The slowdown and challenges may have been particularly evident this year, with specific challenges arising alongside the tension and uncertainty of the election year. Many managers we interviewed noted that the election year had a particular effect on stifling their opportunities and progress. For example, Setar-e-Sahar TV noted, “We want to produce Afghan series, and we have everything we need to do it, but we had to stop because of the elections.” Haft TV supported this, reporting, “the elections have frozen investment and decision making in companies” which has increased the economic pressures and uncertainties for their media outlet.

Some media managers reported the economic struggles, as outlined earlier, as significantly affecting their ability to work. Watandar radio noted, “My media is having a hard time, we lost large contracts...we used to do a lot of positive things, but now we are nothing...we did not have to ask for public funding before 2011.” As highlighted earlier, the economic challenges are manifold, with the interest of donor nations feared to drop once the large scale international presence departs, not only having an effect on the media industry, but the entire local economy. Having being boosted for so long by the international presence, the departure is feared to compound the revenue shortfalls already being experienced. This has potential to impact the revenue of advertisers also, and with corruption, insecurity, an uncertain and poorly controlled government, and the resulting unstable economy, the risk for international private investment is accentuated. Therefore, the media sector could be doubly affected: both directly, through diminishing funds from international donors; and indirectly, as a suffering local economy, assumes a diminishing media spend of local advertisers. Whilst it should be noted that the World Bank anticipate a slowed, but continued positive growth rate, driven by agricultural and mineral

30 Watandar is a radio outlet, not to be confused with Salam Watandar.
resources, neither of these industries are considered high sources of advertising money for the media.

However, despite the challenging economic situation and declining international presence, optimism amongst the sector remains high, with numerous plans to expand coverage in the future. Coming out of the end of a tough election period, media managers reported relief that the pressures of the past year may ease, along with their financial concerns. Faryad commented, for example, “It was a bad year in 2014, but for now 2015 is looking optimistic.” Baran expanded on this sentiment, “2015 is very optimistic, with a large increase in monthly revenue expected, because of new programs, and new NGOs.” It should be noted, however (and as has been mentioned previously), that some of the effects of these restraints would have been offset by the revenue generated by the public service announcements and advertising campaigns throughout the election.

This optimism was also reflected in some outlets’ plans for expansion, with switching to a digital network highlighted as a key plan of many media outlets, as well as increasing the number of transmitters. Yak, for example, shared that they would “access the digital network by April 2015.” Others reported that they would be increasing coverage by investing in new transmitters, with Baran noting, “We will expand with new transmitters because the digital network is not yet efficient. If in the future it improves, yes of course we will switch to digital.” The plans for the rollout of digital television across Afghanistan still remain unclear amongst the actors, with technical challenges forming a key question around the likelihood of ambitious government statements coming to fruition.

However, the cost of change remains a challenge for some. As Sharq TV, in Jalalabad reported, “Yes, we would like to [expand] by digital network, but the cost is too high, and there is no frequency yet available. So we have a plan to expand, but right now we have no budget for this plan.” This situation was echoed by a number of media managers.

---


32 The rollout of digital TV broadcasting was announced in September 2014, by the Ministry of Communication of Information Technology, with the aim to cover the entire country in the coming three years. Clarity over the exact plans, and how this will be achieved, however, is not yet evident. The announcement can be read online: Ministry of Communication of Information Technology, *MCIT Opens Digital TV Broadcasting*, 1 September 2014, [http://mcit.gov.af/en/news/mcit--opens-digital-tv-broadcasting](http://mcit.gov.af/en/news/mcit--opens-digital-tv-broadcasting).
1.2.2 Increasing Segmentation?

The Afghan media sector is undergoing a period of transition, one that may be increasingly challenging in the coming years. A majority of outlet managers interviewed reported the greatest change in the industry over the past four years to be increasing segmentation. This sentiment was expressed particularly well by Rah-e-Farda TV, who reported, “TV channels are more and more differentiated, with an increasing specialization of facilities and target audiences.” However, this trend is more evident amongst new and emerging TV channels. The longer standing, and higher tier outlets tend to remain fairly generalist but are targeting certain portions of the population through specific programming.

Despite indicating an increasing tendency towards market segmentation in the media sector as a whole, when asked about their own outlet’s evolution, many of the first and second tier outlets noted contrary to the trend, saying that they themselves were not changing.

For example, Yak TV in Kabul noted that they followed “the same positioning as always: generalist.” Ayna TV reported that they had been unable to specialize as they may have wished because of external pressures brought about by the recent political and economic challenges in the country. They shared that whilst the media sector as a whole has seen “more professionalization, improvements and increasing sophistication, as well as an increase in the program choice and quality,” their own strategy and evolution had been stifled because of a strategy of “starvation” as a result of the current political situation.

Moby Media Group also indicated that their channels remain generalist: “our audience is very family targeted...we make very sure that the series from 8-10 are for families.” Whilst they do have some programs targeting particular audiences, they don’t consider their channel as a whole to be catering to any type of niche. Shamshad noted the same, sharing, “I believe most programming, including news, religious, dramas and music, are targeted at most groups.”

While remaining quite generalist, most of these first and second tier outlets noted introducing programming that targets specific portions of society. Amongst these targets, second tier outlets noted a particular trend of targeting youth for certain portions of their programming.

For example, Baran mentioned they have a program to target youth by “discussing specific youth issues such as joblessness, marriage, drugs, activities, lifestyles.” Another, Setar-e-Sahar shared, “We target youth and women through talk shows on topics such as obligatory marriage.” Faryad also explained, “we target
mainly youth, through HD and showing new songs, and also through a program that presents Hollywood and Bollywood actors.”

As this demonstrates, whilst there was a lot of talk amongst managers of specialization and segmentation increasing in the media environment, the actual changes appear to be largely seen in newly emerging channels, such as 3Sport, a channel dedicated to sport. New channels are entering the market with a highly niche offering, with Haft TV another such example, as a channel solely broadcasting movies. Saba TV, however, was the exception, as an already instituted channel that noted the strength of their specialization, “because we are specialized in some programs, like programs for disabled people and street children, there is no competitor.”

The emergence of specialized channels is hardly surprising in a market with so many players. When coupled with the decreasing international support, and thus a greater competition to attract audience share and advertisers, it is clear why specialization as a strategy to compete has emerged and may continue to characterize the environment in the future.

1.2.3 PROFESSIONALIZATION

The professionalization noted in the 2010 report continues. Outlet managers outside of the first tier mentioned that since 2010, they have witnessed higher levels of professionalization in the sector, challenged to do so by the increasingly savvy audience. For example, Saba TV noted, “At the beginning, the media were not doing much to improve on their quality, and now to be strong in the media market you have to provide quality, and choose programs based on what people like.” A mounting competition to access diminishing revenue sources has increased the pressure to attract advertisers, and thus to attract the audience. Simultaneously, the audience has become more demanding, having had many years, and a great span of offering to choose from.

Both Killid radio, and Salam Watander also reported that professionalization was their key priority. Killid shared, “It is my objective to become 100% professional. I have to manage this radio even if I don't know yet how to do it...it is a duty for me to be committed, it is a mission. At the beginning, I found only 12 people who were ok to work for my radio, and now they are all 100% professional.” In this case, Killid is indicating a dedicated effort on their behalf to have professional staff to cater for the demands of the radio station, something they are wholeheartedly dedicated to in order to survive. Similarly, Salam Watandar has concentrated on increasing the capacity and professionalization of their staff and business processes, recognizing that, “changes in content aren't possible unless you
professionalize the business itself.” This has involved, for example, implementing an electronic human resources management system to cut the time and energy used in administration; as well as training their staff on communication for development, to ensure all their employees “feel a part of Salam Watandar and our objectives.”

A number of improvements taken together were cited to indicate professionalization, including: increased sophistication of programs; more strategy use amongst channels; a move towards specialization of outlets; and an expansion of the program offering.

The sophistication level of programs was thought to be lifting, driven by the demands of the audience, who see dubbing quality, creative storylines, and picture and sound quality, as contributing to their viewing preferences. Outlet managers reported a greater need for providing a higher level of sophistication in their programming, dedicated to providing a superior experience for the viewer.

In order to resourcefully compete with other channels for a diminishing resource base, a higher use of strategy was also noted. Outlet managers reflected that a greater use of strategy amongst the players was evident, and was being used as a means to remain competitive. Strategy changes were cited as one means to stay afloat and relevant in the current environment.

A move towards specialization, and the emergence of niche channels, as noted earlier, was also taken as a sign of professionalization. Niche channels represent a strategic choice to target a very specific set of the audience, a level of reflection not always seen in earlier years. The shift towards targeted programming, aiming for specific portions of society, is another signal of this specialization, whereby outlets are channeling particular programs to attract a certain segment of society, instead of aiming for general programming for everyone, all the time.
Additionally, an expansion of the program offering was seen as key to professionalization, dictated by an audience accustomed to a constantly innovative, exciting program offering from the leader Tolo. In order to compete, outlets report trying to think laterally, in order to provide original content that will attract the audience. This includes the expansion of genres making up Afghan television environment to include new content such as sport. Or for example, the innovation of Khurshid in offering live boxing programs, or becoming the exclusive media partner and broadcaster of the Rumi Music Awards, (see Focus Box 1).

Outside of a naturally maturing industry, an increasingly demanding audience was seen as pushing the shift towards professionalization. For example, Baran acknowledged, “the offer in programs has increased as the audience has more knowledge about programs and national issues.” Another, Lahza radio from Mazarae-Sharif, noted, “people are paying greater attention to the content of the programs and not only to music. The people are getting more talented.”

In this way, an increasingly savvy audience is requiring that media outlets be more creative. Sharq radio noted, for example, “We broadcast different kinds of programs, because if we broadcast the same programs we lose our audience.” Shamshad agreed, commenting on the progression of the industry, “there is now more attention paid to the quality of productions.” In order to keep the audience captivated and entertained, outlets have to increase the variety, as well as the quality, of their offering.

Rabia Balkhi radio noted that the landscape has also changed to allow greater access for women to work in the media, “At the beginning, women working in media were not allowed, but now the media sector is opening up to newly skilled and wealthy women...because the media has informed the population.” The cycle of the media providing education, which is then used by the audience to formulate their demands upon the media, is an interesting trend that informs the mounting pressure on the industry to professionalize in order to keep up with the sophistication of the audience. So far, such quality amongst the industry was seen to be lacking by some, with RTA noting, there are still “Only a few channels are able to produce quality...because of a lack of regulation and industry standards, and no code of broadcasting.” Salam Watandar also shared that, “Whilst there has been more emphasis on professional content, there are a limited number of outlets concentrating on this.”

However, what managers did not mention was the effect that Tolo, as the standout contender in the sector, was having on their need to professionalize. Whilst the audience was seen to be pushing outlets to increase their quality, and
to offer great program choice, the pull factor of Tolo was not specifically indicated. The audience’s expectations could be partially driven by the options available to them – and when they are presented with the quality, innovation and creativity of Tolo’s offering, it increases their expectations of other channels. Having one outlet with a very high level of quality puts pressure on competitors to offer either an element of differentiation, as was discussed in the section on segmentation, or, to provide a similar level of quality.

These examples demonstrate how the capacity for media outlets to transform into professional, quality-driven media channels could dictate their success. At the beginning, with such a dearth of media in the country, the very existence of programming was successful in itself. However, with the current level of competition, and diminishing revenue sources that is putting pressure on the industry to transform into a self-sustainable entity, quality is being pushed as a priority. For Moby Media Group this is a natural trend that will, over time, weed out those media outlets for which media is secondary to their main business priorities. Moby Media Group envisages a future of Afghan media compelled by professional, commercially motivated, and proficient broadcasters.

1.2.4 SOCIAL MEDIA

Despite the relatively small number of internet users in the country, the traditional media sector has taken notice of the power of those who have developed their social media presence over the past four years. As was discussed earlier, the importance of the Internet amongst its user group appears to be growing, with particular reference to their use of social media.

Many of the outlets we spoke to, across all tiers, are investing in their social media presence online. They reported use of YouTube, Facebook, Twitter, and websites.

Media outlets currently represent some of the most powerful online presences for the Afghan Internet user. For example, the ToloNews Facebook page is the most liked Facebook page by local fans, with over 400,000 Afghan fans.

YouTube is also very popular, with some TV channels streaming their programs online. Yak TV, for example, has over 40,000 subscribers, and as of December 2014, had over 29 million uploaded video views.

33 As noted earlier, estimated to be around 8% of the population, Ministry of Communication and Information Technology website, Telecom’s Sector Recent Achievements, http://mcit.gov.af/en/page/4876/6005
Outlets have also set up separate YouTube channels for popular programs, such as ‘The Voice of Afghanistan’, where viewers can stream the show at a time of their convenience, allowing them to digitally keep up to date with their favorite programs.

In recognition of the particular challenges facing radio outlets, as consumption decreases, and television and internet use increases, Salam Watandar has strengthened and improved their online programming, “in the hope that the final product will be able to be a means of financial income. We like to be prepared for the future, we have to evolve and be one step ahead of the game.”

Outlets reported using social media as a key feedback mechanism, linking them directly to their audience. For example, Khurshid commented, “Social media is very important for feedback.” Saba TV reported the same, that they use social media for “getting feedback, posting new programs and introducing the audience to our programs.”

1.2.5 INDEPENDENCE

While for the most part the media seem untouched by government interference, they do try to exert their influence from time to time, both in softer approaches whereby they release “suggestions” through letters and press releases; and in hardline tactics that involve directly shutting down certain media activities. For example, in 2012, the government requested that female presenters wear headscarves and minimal make-up, through a letter distributed

---

by the Ministry of Information and Culture (MoIC). In early 2014, the Afghan government (under President Karzai) also cracked down on advertisements that were promoting the retention of U.S. troops in Afghanistan after 2014. As a result, advertising spots were shut down, and advertisements were stopped from airing.

**RTA also reported that as the national network, a lack of independence is an issue for them,** as they are sometimes sent pre-packaged news by the government, leaving no room for their own interpretation. This role stifles their capacity to act as an independent media entity and instead relegates them to the role of spokesperson.

Having said that, however, **there are also visible changes in this regard.** Arezo TV for example, noted that, “Tolo is recognized for pushing the frontiers in this respect.” Shamshad also reported, “Media is relatively more free than it has been, and the media challenges the government more than it used to.” Tolo is commonly known for pushing the boundaries of the accepted norms, presenting modern, challenging programs and representations formerly foreign to Afghan media and they have received criticism for this in the past (for example, ‘Afghan Star’).

**More independent than neighboring countries**

**Media managers repeatedly cited the lack of regulation in Afghanistan as a clear indication of their independence,** with self-censorship seen, in their opinion, as the only form of censorship. Afghanistan’s managers felt that this is unique when compared to countries in the region, particularly when compared to Iran, who is limited by government censorship, and Pakistan, who is affected by military pressure. For example, Rah-e-Farda noted, “Afghan media are more independent: Media is monitored by the government in Iran and in Pakistan there is military pressure. In Afghanistan, there is no regulation on production apart from self-censorship.”

**Some outlet managers went as far as saying that a comparison to Iran or Pakistan was obsolete given the absolute freedom of the media in Afghanistan.** Instead, it was contended that Afghan media should be compared to Turkey, with Salam Watandar, for example, reporting, “Of course, we should not be compared to Iran or Pakistan, but with Turkey. With all the money that has been spent, we should have Turkey as the model for our media sector.”

---

36 Ferris-Rotman, A. Afghan government asks for headscarves, less make-up on TV, 14 Feb 2012, Reuters Online, http://www.reuters.com/article/2012/02/14/us-afghanistan-headscarves-tv-idUSTRE81D11720120214
This relative freedom was seen to provide more space for innovation; however, the industry is still stifled by self-censorship in a maturing regulatory environment.

Censorship

From the media managers’ perspective, censorship is not considered an issue in Afghanistan. However self-censorship is openly accepted as the norm. The very sensitive political, cultural, and societal pressures that are specific to Afghanistan has seen that little has changed in this regard since 2010.

In 2010 it was concluded that there appears to be a clear understanding of what the media can and cannot talk about. This sentiment was strongly supported by the findings in 2014, with a number of managers noting that taking into consideration their audience and the society within which they broadcast leads to some self-censorship. Rah-e-Farda shared, “As far as I know, censorship has stayed the same from the beginning until now. The media is not afraid to go and ask questions to a high official government member, and the government is not requesting that we don’t ask questions from them. In that way, the media is free to ask them any kind of question…but in some cases we do censor things because we know that our audience may not like some of the content without censorship.” Similarly, Saba reported, “Usually we do censorship based on what is good for the country and the people. For us, our audience are important, and we know what they would like, and not like, to be censored.”

However, it is debatable whether such an approach to content creation truly underpins an independent media. For example, Sharq radio explained, “All our programs are prepared with Afghan culture in mind, so we don’t need censorship in our programs.” Whether this reflects a sense of self-censorship that limits media from touching on pertinent issues, or whether it reflects a media that creates content relevant to its audience is debatable.

Self-censorship was a noted tactic of survival for journalists, who have reported suffering increasing levels of threat when conducting their work. With a large number of attacks on journalists or media outlets left without government investigation or punishment, violence appears to be escalating, bolstering the brazenness of those individuals threatening the media. Journalists have therefore reported avoiding reporting on dangerous topics, such as land grabbing by government officials, corruption, and violence against women, using self-censorship as a survival method.38

38 Stop Reporting or We'll Kill Your Family”, Human Rights Watch, 21 January 2015, http://www.hrw.org/node/131602
This study also indicated instances where self-censorship by the industry as a whole was explicitly discussed and collective decisions made. Yak TV reported that **TV channels would sometimes come together to discuss whether they would cover certain issues, as a form of internal broadcasting policy.** Such cases included the rape case in 2014\(^3^9\) where media outlets came together to discuss whether they should report on the issue, given the heightened emotions around it and the potential for it to incite violence or other problems. Another example pertains to the 2014 Presidential elections where media outlets collectively decided to not report on Taliban attacks in order to avoid a situation where people would be too scared to take part in the vote. More recently, Afghan journalists have made the common decision to restrict their reporting on Taliban attacks, in order to diminish their effect. Afghanistan's National Journalists Union (ANJU), released a joint press statement with Nai, indicating they were taking a collective response to the saturation of the media with Taliban imagery in response with an escalating number of Taliban attacks in Kabul in December 2014.\(^4^0\)

**Media law**

The regulatory environment remains fairly stagnant, with little significant developments since the report in 2010. Media managers reported that the law has not changed since 2010, but an interesting insight by Arezo TV was, **“the law does not change, but the spirit of the law may be changing thanks to big players like Tolo.”** By pushing the boundaries of the norm, Tolo may challenge accepted practice.

The Mass Media Law, which was adopted in 2009, prohibits censorship and guarantees the right of Afghan citizens. However, many of the provisions included in the 2009 law are still not in place. For example, the Mass Media Commission, and High Media Council (to which the commission would report) to develop a complaints process is still not functioning. In its place, a Media Violations Investigation Commission is operative, which concentrates largely on

---

\(^3^9\) The Paghman rape case, in which seven men were convicted and sentenced to death in September 2014 for gang raping four women, arose high levels of national anger when it was extensively covered in the news. Their trial was even televised live. For more information, see: Norland, R. and F. Muzhary, *Afghan Court Wastes No Time Sentencing 7 to Death in Rape Case*, The New York Times, 7 September 2014, http://www.nytimes.com/2014/09/08/world/asia/afghan-court-sentences-7-men-to-death-in-rape-case.html?_r=0

the complaints of officials against journalists, hardly supportive of the development of further media freedoms.\textsuperscript{41}

In 2012, a draft media law to replace the 2009 media law was circulated to government bodies for comment by the Ministry of Information and Culture. This law, which was never passed by parliament, would have significantly expanded the powers of the government to interfere in, and provide oversight of the media. Concerns were raised about the impact the law could have on the freedom of the media that had been so long considered a success story, perhaps contributing to the law never being put before a vote at parliament.

In 2013, an electoral Media Commission was created, charged with monitoring the media's coverage of the elections, 60 days before the poll, to ensure fair and balanced election coverage.\textsuperscript{42} The responsibilities of the commission included monitoring, dealing with complaints, and ensuring media compliance with the 48-hour media blackout before the election.

While the existence of a media law is an achievement in and of itself when compared to countries in the region, the next challenge for the development of Afghanistan's media regulatory environment seems to be the application and enforcement of this law.

2. Positioning

2.1 Current positioning of the various TV channels

The Afghan television sector looks remarkably like that of 2010, with a few distinguishing characteristics. A majority of the channels can be divided amongst the six overlapping categories identified in 2010:

1. Private generalist channels
2. Language specialists
3. Religious channels
4. Party-backed channels
5. Regional channels
6. Governmental outlets, made up of the sole broadcast government network, RTA.

\textsuperscript{41} Stop Reporting or We'll Kill Your Family", Human Rights Watch, 21 January 2015, http://www.hrw.org/node/131602

Private generalist channels and language specialists are generally funded through commercial advertising; Religious channels and party-backed channels tend to be funded by a mix of commercial advertising and support from their private backers.

However, in 2014, we also see the emergence of a very small but notable category of channels targeted at providing a precise service (outside of the linguistic target groups). These channels, such as Haft TV, who only broadcast films, are positioned to provide a niche service to the audience, differentiating themselves through specialization.

Another change witnessed since 2010 is the expansion of some regional stations into other provinces. Whilst a majority of regional channels clearly position themselves as an outlet designed specifically for their province, others have ambitions of expansion, which could significantly change their positioning and thus offering in the future. For example, Asia, beginning in Herat, has now expanded to Balkh, and will reportedly soon start broadcasting in Nangarhar, using a Killid style model of regional integration.43

In another change, but to the reverse, Moby Media Group report looking to expand into more local markets, sharing that they aim to set up radio stations in provincial areas that have locally-targeted content, such as regional news broadcasts. These ambitions hope to attract local, private-sector investors.

2.1.1 Positioning amongst second tier outlets

Second Tier outlets,44 with the exception of RTA, are a mix of commercially driven private generalist channels and language specialists. These channels aim for national coverage, and whilst still supported by a mix of public and private clients, are largely competitive, commercially ambitious outlets.

This subset of channels position themselves on a language split akin to the national representation of languages, allowing them to be nationally attractive, broadly representative outlets, without any heavy indication of aligning themselves to one particular ethnicity.

Yak TV was introduced in 2010 as one of the most recent private channels, and was considered a bold

---

43 The Killid model refers to the Killid radio group, who began broadcasting in Kabul, and then structured itself as a network of semi-independent stations based in the main cities. A portion of programming is common to all Killid stations, with the remainder produced locally, and with regular deliveries of content to the affiliates who can choose what to broadcast

44 As indicated in the introduction to the Afghan media sector in 2014, they are: Lemar (9.7%), Khurshid (8.5%), Ariana (5.6%), RTA (2.9%), Shamshad (2.2%), and Yak (1.5%).
and competitive new addition to the market. However, since the ratings began, they have seen a sharp decline in audience share, particularly in the last year (from 4% in November 2013 to 1.5% in the latest November 2014 round).

In 2014, Yak still aims to compete with leading channels, with a clear vision of itself as a provider of "general entertainment," with a target of national appeal. In terms of evolution, Yak considers itself as offering the same positioning as always, to be a national provider of entertainment, without a particular niche, "but with more locally produced programs than in 2009."

As a fully independent station, Yak is currently broadcasting 70% Dari and 30% Pashto content, with aims to "increase our Pashto share within the next few years." Their self-identified top 5 programs include a range of entertainment programs, news and a debate program. This offering is wholly consistent with their vision, and sees them firmly instituted as a national, generalist, and commercial channel with a well-rounded offering. With a range of high-level commercial advertisers consisting of banks, Telco companies and large food conglomerates, Yak's reputation is clearly aligned with their vision, seen to have widespread appeal and audience share. A significant 30% of their revenue is still made up of funding from international NGOs.

Khurshid, founded in February 2011, is a relative newcomer to the media scene, successfully entering the commercially competitive market by capturing 8.5% of audience share in the latest round of ratings.

Khurshid positions itself as a generalist, national channel differentiated through innovation, noting, "Tolo is more experienced, but we try to innovate more." They report having "many innovations, such as live boxing and the Afghan cinema award."

Their wide variety of program offering is made up of 20% Pashto, 75% Dari, 5% English.

Khurshid appears to have an energetic push to compete and expand their foothold, noting, "we are the first channel switching to the digital network" and "we will soon launch 2 new channels: Khurshid News and Khurshid Sport," reflecting a clear ambition to compete nationally with the biggest contenders.

Despite their vision to be innovative, they also noted, "we use any kind of strategy, but we mostly try to copy Tolo's successful shows." Whilst not exactly consistent with their vision for innovation, as has been discussed earlier, their acquisition of the rights to broadcast Wadi e Gorgha, which was previously aired on Tolo, was in
fact a very successful strategy, helping them gain an extra 6.6 points in audience share since the last ratings in November 2013. Whilst it may be unlikely they will be able to repeat this strategy, it may have provided the original boost they required to generate an audience following, and switch to providing high quality original content on their own.

Their revenue is largely commercial, with only 10-15% from NGOs, and they report, “since the last couple of years, our revenue has covered our costs.” Their advertisers are made up of the big commercial players: banks, Telco, food conglomerates, and with the interesting additive of newcomers such as energy drinks, perhaps reflecting their reputation for being dynamic and young.

RTA, much the same as in 2010, consists of national and provincial level television and radio. Improvements, indicated to be a key opportunity for RTA to gain audience share in 2010, do not appear to have been implemented so far.

As the national broadcaster, RTA provides a balanced content offering, with a representative language breakdown of 40% Dari, 40% Pashto, and 20% minority languages.

RTA itself is aware of being stymied by its lack of creativity, noting, “We have great capacity, and tight links with foreign channels, but no creativity,” but they hope for changes in 2015 with an indicated change in strategy, reporting “We currently have no competition with other TV channels, but this may come with next year’s shift in strategy.”

They also note the constraints under which they function, whereby they remain somewhat stifled by their position, “we are currently the mouth of the government, whilst ideally we would be delivering a public service.” The issues associated with this position were noted, “sometimes we are sent already packaged news by the government or parliament, with no room for interpretation by RTA.” Ideally, the noted forthcoming changes in strategy would address these issues.
Shamshad’s positioning remains steady from 2010: an almost entirely Pashto channel aimed at Pashtun communities that they believe have traditionally been excluded from the media’s reach. They shared the story, “Afghanistan is very traditional, and there is low literacy, especially in Pashtun areas. When television started in Afghanistan, it was mostly concentrated in major urban areas, but a majority of the population was in the countryside. We want to educate these people in order to bring them to the table, promote moderate Islam, and prevent them from pushing towards a different tradition. We had to start with tradition-based programming, and walk the population using baby steps toward this goal.”

With their strongest coverage in the South, East, Centre and some of the North, Shamshad concentrates on having reach in the entirety of the provinces they broadcast, “in provinces where most stations would have one transmitter just for the city, we often have two in order to cover the full province.”

Their content breakdown, consisting of 60-65% news, education and society, is consistent with their vision to be an educational, informative, serious media outlet. Interestingly however, the country of origin of imported programs has shifted from 2010 when a large proportion was bought from Pakistan and the Middle East. In 2014, they report that the 20% of imported content (which is largely cartoons, dramas and documentaries) are “mostly from Turkey, with some from India and Pakistan.” This appears consistent with the trends seen in the wider industry.

Despite priding themselves on reaching a predominately rural audience, Shamshad still strives to remain modern and competitive, reporting that they have “begun implementing a plan [of how to be self-sustainable] with the help of experts from the Philippines and India,” and they stream all of their content online.

2.1.2 The positioning of the others

Other channels make up a broad variety of offering, constructed of party-backed, religious, regional, and specialist channels.

Private generalists

**Saba TV** presents a very interesting composition, as one part of the Saba Media Organization, the TV sector is actually made up of two channels, with one channel covering 9 provinces, and broadcasting 24 hours; and the second broadcasting from Tirinkot, Uruzgan province for 12 hours daily – double what they were providing in 2010.
Their programs have a strong focus on Afghan traditions and cultural heritage, as well as on human rights and education, with the aim “to open the window to the horizon” (to give hope to the people).

Their content breakdown has a heavy focus on investigative content, with many of their top programs being documentaries. They aim to provide content that “no other TV have programs like those for the disabled, children who do heavy labor, and education programs...we are specialized in some programs where there is no competitor.” They see this specialization as key to attracting their audience, as being exclusive providers of content.

Despite the growth indicated by an increase in broadcast hours, in 2014 they reported financial difficulties, with some of their key programs no longer in production due to budget constraints.

Their revenue stems 60% from NGOs and the public sector, and they report their main advertising clients to be NGOs, the international community, communication companies and banks, which is fairly consistent with their unique human rights/educative based program offering.

**Party-backed**

*Ayna*, owned by General Dostom, the leader of Jumbesh-e-Milli, and current Vice President, are unsurprisingly positioned to target the political supporters of their owner.

Through both their broadcast language as well as their geographic spread, Ayna are specifically positioned to broadcast to their key markets in the North of the country. They broadcast 80% of their content in Dari, 20% in Uzbeki and 1% in Turkmen, and reported a diminishing number of provinces in which they broadcast; “We broadcast in 11 provinces at the beginning including Kandahar and Herat, but now we are only in Jawzjan, Faryab, Sari Pol, Balkh, Samangan, Kunduz, and Kabul.” With such a specified audience, broadcasting in markets without significant numbers of Dostum’s political supporters would be difficult to sustain.

They report their news program as “the key driver of differentiation,” as it is targeted at the Uzbek population. However the most recent ratings data indicates that at 16:30, they reach a peak of 31.4% of the native Uzbek-speaking audience, which is when they broadcast ‘Chance’, an entertainment program.
Rah-e-Farda, created by Mohammed Mohaqiq, the leader of Hezb-e-Wahdat, is far less politically overt than Ayna, explicitly reporting “we don’t have a political affiliation, as you know the outlet belongs to Mr. Mohaqiq, but it does not mean that we broadcast anything for his party or his ideas.”

Their positioning however is not entirely clear. They reflect that they are not commercially motivated, but rather are working for “public awareness.” However two out of three self-reported top shows were sport news and Korean series. Their third, political debate programming, is more consistent with that ideal. There has, however, been an evolution in their programming, moving away from their initial core programming of sports news, to become more diversified in their offering.

Regional

Sharq, as a channel concentrated in Nangarhar, is positioned as a generalist, with a local concentration. Their language choices: 50% Pashto, 30% Dari, 20% other languages, support their vision to connect their audience with the government. They consider their direct relationship with the local people to be their differentiation strength, however in 2014, they are reporting financial difficulties, “We are not profitable, for the last 2 years we don’t have a good income.”

In 2010, Arezo, as a local channel of Mazar-e-Sharif and only three years into their broadcasting, was broadcasting largely Tajik movies and music videos, and was reportedly covering a significant part of its costs through advertising.

In 2014, their content offering shows significant change with Arezo reporting a vision of “education through entertainment,” and an offering spanning a much wider variety of content, with a greater share made up of entertainment than of movies. Whilst they note films are still an important slot in their content, the country of origin is now India and the US, rather than Tajikistan.

Faryad is a local TV station of Herat that broadcasts 100% Dari content. With an exposure to broadcast media second only to Kabul,45 Herat has seen a flourishing media sector in past years. Faryad has entered this market fairly recently, beginning in 2012, and is positioning itself as a channel strongly focused on delivering to the local youth population. Their advertising-base reflects this

reputation, with Faryad reporting that their advertisers are largely made up of NGOs and small businesses from Herat.

Whilst Faryad recognizes that they “mostly target youth,” their stated vision is to be a “bridge between the people and the government.” Their programming breakdown however is more indicative of their focus on attracting the youth audience, with over 50% of their content made up of movies and series, and another 30% music. They reported broadcasting no news programming, and the final 20% include some social, community and political programming, which could potentially be referring to that “bridge.”

**Setar-e-Sahar** presents another interesting example of how a channel’s vision may be at odds with their offering. Setar-e-Sahar reported their vision as “increased leadership for youth, and gender parity.” However, their content breakdown consists of 75% series, movies, entertainment, music and sport. Similarly, their most important shows consist of wrestling, and two public service campaign programs (anti-corruption and anti-drugs).

Only one of the shows they reported as their most important appeared to be linked to their vision – an investigative show on women and society. Their strategies involve counter-programming by showing, for example, wrestling, when Tolo’s most popular shows are airing. These factors, whilst perhaps indicative of an astute use of strategy to capture audience share, is also indicative of a distinct fissure between their vision and reality.

**Hewad TV** is based in Kandahar and its owner, Afghan Azad, also owns a local radio station, as well as a number of press outlets, all in Kandahar. Their advertisement revenue is made up of a mix of private (50%), public (40%), and military advertisements (10%). Taken with the TV’s reported vision to provide a full service of programming, the commercial ambition driving this group is evident, aiming to position themselves as a powerful regional media influence. The ratings confirm this. As a locally established TV channel, Hewad commands a sizeable audience share of 36.4% in Kandahar, leading the way over Lemar (34.8%) and Khurshid (9.8%).

The security concerns that they noted in 2010 still exist, with some of their journalists encountering threats from the Taliban.
Asia, whist currently broadcasting only in Herat province, reports they will soon be expanding to Jalalabad through the Killid model of networking.\(^{46}\)

Interestingly, despite these plans, they still report being Herat-centric, noting that “we are the best for local issues in Herat,” and a large proportion of their advertising clients made up of smaller local businesses, with some bridging money from their owner.

### Niche Positioning

Haft, created in 2010, is representative of what could be the start of an emerging market of specialist channels in the Afghan media scene. Haft only broadcast films, and aims to “encourage the improvement of Afghan cinema.” To enter the expansive Afghan media scene in 2010 with a niche offering differentiating themselves from the many other players was a very strategic move.

They currently cover only Kabul city, but plan to increase if they find the funding. They “mostly target youth,” with their most successful programs self-identified as American action movies and Bollywood movies. They rightly explain that they “are in a niche, as a cinema and movie channel, with low means but a clear strategy.”

However, they are currently losing money, and report that without a license for their movies, no big advertisers will invest in them.

As a few of these examples demonstrated, there is a discrepancy that currently exists between some of the Afghan channels’ visions, their strategies, and their performance. Sustainability, intrinsically linked to a channel’s capacity to attract an audience, is perhaps encouraging channel’s with this issue to move away from their vision, to provide content they believe to be more popular. Clarity on positioning, as well as the capacity to align an outlet’s vision, offering and audience, could help the sector to transition more successfully by demonstrating a capacity to use this to guide their strategy and program offering.

#### 2.2 Current Positioning of the Various Radio Stations

As the relative importance of radio in the media landscape declines with the increasing power of television, the radio sector is reporting particularly difficult financial times in 2014. From those outlets interviewed, positioning remains similar to that in 2010. These include:

- International stations such as BBC, Azadi and Ashna;\(^{47}\)

---

\(^{46}\) The Killid model refers to the Killid radio group, who began broadcasting in Kabul, and then structured itself as a network of semi-independent stations based in the main cities. A portion of programming is common to all Killid stations, with the remainder produced locally.
Stations catering to a niche audience such as women, or youth are emerging, perhaps reflective of a shift required in the industry to remain relevant in a changing landscape.

Killid is structured as a radio network, with a number of semi-independent stations in the main cities. Whilst each local station has its own team, and own programming strategy, a portion of programming is common to all Killid stations, with the remainder produced locally. Aside from the direct Radio Killid network, The Killid Group (TKG) also have a relationship with affiliate stations across the country, with regular deliveries of content made to the affiliates, who can choose what to broadcast. TKG were established and operate under the Development and Humanitarian Services for Afghanistan, and also run two weekly nation-wide magazines.

Killid see itself as “Your radio,” strongly dedicated to providing a media service with a purpose, not just as “loud speakers,” but as a vehicle for change. They report being financially profitable since 2005, and as they run on a non-profit business model, profits are reinvested into increasing the coverage area of existing provincial stations, as well as investing in new local stations.

Since 2010, they have gone online, with Radio Killid Online, which they report is also listened to in the US and Europe. The amount of common content has decreased from the approximate 25% reported in 2010, to 5-10% in 2014, across their network of stations. The cultural focus noted in 2010 also appears to have decreased, with a higher concentration on news, live entertainment and political talk show programs, and recorded drama and political programs. Killid now cover 17 provinces, with their profit reinvested into the expansion of their network.

Approximately 30% to 70% of their revenue was reported to come from private advertisement, with the other 30% to 50% coming from NGO advertisements, demonstrating a good mix of commercial and public clients.

Killid don’t see itself as competing with any local stations, and has a strong dedication to professionalization, seeing their positioning as competitive with the BBC. Killid report that they try to differentiate themselves with BBC by offering

47 None of which take advertisements, so don’t compete for commercial advertising revenue.
faster reporting of breaking news, because of their many local reporters directly in the field. Killid remain strong, at seventh position in audience share as of the last ratings round, with a total share of 2.3%.

**Watandar** Radio has increased their coverage significantly since 2010 when they covered only Kabul and Herat. In 2014, they also cover Kandahar, Mazar, and Jalalabad.

However, Watandar reported significant financial difficulties over the past 5 years with Watandar group having to sell some of their key assets. They reported that they lost some primary contracts with Roshan and Etisalat and as a result, had to sell Rumi radio, Alexis FM, and Watandar TV. They also recently stopped broadcasting in Kundoz and Ghazni.

They report that whilst between 2010 and 2013, Watandar Kabul was able to finance local Watandar stations, it is now very difficult and affecting their ability to run large-scale nationwide campaigns such as the 2007 electricity campaign they ran to “call for more efficient electricity distribution in the country, which was supposed to have had a great impact on political decision making.”

In 2014, they broadcast 50% music, 50% vox populi, which appears to be a successful formula of “music, talk, music, talk.” They reported that when trying to innovate outside of this formula, by producing their own shows, their audience dropped and so they stopped.

They also see themselves as unable to compete with the large institutional radio stations, reporting that “Arman is a big institution, we are not, and we don’t want to fight them by copying them.” This implies that they prefer to aim for their own, perhaps smaller, audience rather than putting themselves in direct competition with the big players.

**Salam Watandar**, originally an Internews-supported initiative, is now a fully independent radio station broadcasting and transmitting from Kabul. Salam Watandar not only have their own station, but operate over a network of local stations, who broadcast at least two hours of Salam Watandar content in the morning and two hours in the evening; giving it the unique operating stance of having the capacity to reach a national audience.

Having being inaugurated as an independent NGO in 2012, Salam Watandar has implemented significant changes in order to, as they explain, “prepare us to address the challenges of the external environment, which is not in our hands.”
Faced with the upkeep of steep financials in 2012, they had to “determine how to stay afloat, and vigorously looked at ways of funding.” They chose to focus on attracting donor money, and the management team made concerted efforts to professionalize the business in order to remain sustainable by forging strong relationships with donors, based on better communicating the quality and impact of their programming. As an NGO, any profit is reinvested into the organisation and the partners, and their endeavours to professionalize have seen great success, having reported that they are sustainable for the next three years on current projects alone.

Salam Watandar Radio Service now provides content to a network of 67 Afghan-owned and operated radio stations, in 34 provinces, significant growth from 2010 when they were partnered with around 40 outlets in 27 provinces. Their staff numbers have also grown, from 31 staff and 8 to 9 provincial reporters in 2012, to today's 100 staff, and 18 provincial reporters. This includes an increased number of female staff, rising from 5 in 2012, to 20-25 today.

Salam Watandar supported stations must broadcast at least four hours of their content everyday, an increase from the three hours required in 2010. This change was a business decision implemented in order to give them “ample opportunity to attract more clients.”

They see their role as providing an important function in society, sharing that “we have the ears of millions of Afghans, and we have a huge responsibility to the people to educate them towards a brighter and more developed future.”

Rabia Balkhi is an example of a very niche radio station, which has been around for some time. Rabia Balkhi is a radio station local to Balkh province that very specifically targets women. The vision of the radio station is both to “broadcast the voices of women” as well as focus on capacity development for women by hiring and training a mainly female staff (currently 60% of their staff is female).

They report covering 75% of the districts of Balkh province and broadcast for 16 hours daily. There content is broken down into a variety of programs including 25% Salam Watandar content, 25% of their own programs in health, investigation, law, economics and politics; 25% programming from the civil society network in Balkh that uses the radio as a tool for advocacy; with the remaining 25% made up of music, call-ins and advertisements.

While in general the outlet has been evolving favorably, this year has been particularly difficult from a financial perspective. Rabia Balkhi initially started with broadcasting 2 hours within a 4km radius, which grew to a peak in 2013 of
20 hours over a 60km radius. However, this dropped to 16 hours in 2014 as a result of their financial difficulties.

**Jawanan** is another example of a radio station dedicated to a niche offering. Created in 2009, Jawanan was bought by the Awaz Media Group$^{48}$ in 2012 and renamed “Youth FM.”

With a vision of being the “voice of the new generation,” Jawanan is broadcast on a single frequency, currently covering 13 provinces, with live broadcasting on their website.

Their content includes music, gossip, sports and entertainment, with a heavy focus on engaging with their audience, even with production, “all shows are produced after audience focus group discussions led by the marketing department.” They have a strong online presence, with a well-designed, attractive website.

With a modern, hip image, Jawanan is perhaps representative of the new generation of radio programming in Afghanistan, transitioning away from the news-based programming of the past, into an entertainment and sports-based appeal. A growing advertisement sector appears to support this, having moved from no advertisement in 2012 to being almost profitable in 2014 thanks to telecommunications firms and banks, a trend in reverse from the declining revenues reported by most other radio stations. This could be reflective of their successful strategy to target a growing youth audience interested in a more modern, stylish radio station.

The remainder of the channels we spoke to are largely smaller, ultra-local stations that are reporting similar financial struggles to many noted above. They largely position themselves as local generalists, such as Sharq in Nangarhar, and Sanga in Kandahar, with the exception of Nargis who positions itself similar to Rabia Balkhi, as a channel for women, but in Nangarhar.

---

$^{48}$ Awaz Media Group was founded in 2004 and currently has a portfolio including Jawanan radio station as well as 5 community internet platforms. It is also a production company, producing a variety of programs from news to fiction.
2.3 **Current positioning of the internet sector**

Of the Internet managers that we spoke to, a very particular story was told of their role in the Afghan media environment.

In the already highly saturated media environment, Pajhwok, the leading news agency in Afghanistan, see its role as providing inroads to the wider world, and has a strong focus on encouraging the transparency of the Afghan government. They report their role as providing a stronger voice for the people than other media, and being an outlet “fighting for change.”

Their main website averages 700,000 views per month, with 250,000 unique visitors, but numbers for indirect readership are difficult to collect because of the spread of their content to many other media outlets. As a news agency, Pajhwok functions to gather, write, and report news, that they then sell to subscribers around the world. These subscribers, generally made up of news outlets, NGOs, government ministries and the likes, use Pajhwok as a supplier of objective news throughout the day. Therefore, Pajhwok's capacity to measure their indirect readership, with their reports published by other news outlets around the world, is impossible to collect. However, they believe that more than 60% of content related to Afghanistan broadcast internationally is originating from them.

Despite this success, taking into consideration advertising (5%) and subscription revenue (40%), the agency does not break even. Rather, funding from media development projects covers the gap (60% of their funding), but this funding is on the decline.

They report a large readership abroad, with only 50% Afghan readership, followed by the USA, Pakistan, and India. They position themselves with the aim of producing the best news in the country, with a quality control team regularly comparing their reports to their competitors.

Since 2010, Pajhwok reports a number of changes, including a huge jump in the number of journalists in their network around the country, from 45 in 2010, to a reported 120 in 2014. The language breakdown has also shifted. Whereas Pajhwok then produced reports equally in Dari and Pashto, with around half of the content translated into English, in 2014 all content is provided in English, Dari and Pashto, making information accessible to a very large audience. Interestingly, they report that their “English readership is by far the largest,” not

---

49 This refers to all traffic on the site, irrespective of country of origin.
only because of an English speaking audience made up of foreigners, and Afghans abroad, but also because their local audience has a propensity to read news in English. They have also expanded, with the addition of specialized websites such as their election website,\(^{50}\) and a mining website.\(^{51}\)

Their subscription service has also diversified, in reflection of the challenges of securing subscriptions from organizations that are suffering financial difficulties. Individual subscriptions now form a bigger part of their business, forming a much larger part of their revenue. Pajhwok has been reactive and creative in responding to these challenges, for example, in consideration of the small number of Internet users, Pajhwok started an additional SMS service in partnership with Etisalat, which provides the top 5 headlines of the day via SMS for 3.5 AF/day.

As they shift to attracting an audience of individual readers, content has also shifted somewhat, to include a greater share of non-security-related news. As an example, during the football and cricket world cups, they created an SMS service to deliver news directly related to these events.

**Yakja**, an Afghan social media website, aims to provide a service filling the gaps they saw in Facebook, such as the capacity to connect to everyone, not just friends; uploading audio files; creating a service for job announcements within the site; and creating an online store integrated into the service. They were also inspired by what they saw as the success of Kabuljan, another social media website in Afghanistan who identify themselves as “the first Afghan national social network, we hope this project will unite all Afghans around the world.”\(^{52}\) Yakja differentiate themselves by offering their content entirely in Dari, whereas Facebook and Kabuljan offer a number of languages (Kabuljan is in Dari, Pashto and English). With such a high usage of Facebook around the world, Yakja was prompted to start their website to, in the same vein as Kabuljan, “bring together all Afghans around the world.” As many in the media industry, they also report financial difficulties, with ambitious plans to expand given the financial means to do so. As of October 2014, they reported 1300 users as having joined and created a profile.

The emergence of Afghan-based websites such as Yakja are representative of a changing scene, whereby the Internet is beginning to take an interesting role in society, even if amongst a small percentage of the population.

\(^{50}\) [http://elections.pajhwok.com](http://elections.pajhwok.com)

\(^{51}\) [http://mines.pajhwok.com/](http://mines.pajhwok.com/)

\(^{52}\) According to KabulJan’s description, found on their website terms of service, at: [http://kabuljan.af/](http://kabuljan.af/)
3. The Programming Landscape

The genres taking up space in the programming landscape of Afghan media in 2014 look much the same as 2010, with a few notable exceptions.

The importance of news to the Afghan population, and in particular its relative importance to their media consumption habits has been well established in previous studies. This remains largely unaffected, with news making up around 10-40% of the programming. Whilst the majority are broadcasting news somewhere within this range, there were a few channels that reported a different programming model. Pajhwok, for example, reported, “There has been a shift from strictly security and political news to covering more business, entertainment and culture in our news.”

Saba TV reports an interesting breakdown, with only 2% of their programming made up of news, and a very large proportion, 21%, made up of investigative programming. They also have 10% political programming. The interest in investigative journalism has been consolidated in the industry since 2010, with some outlets such as Saba aiming to provide more in-depth analysis on specific issues. For example, one such program, ‘Adalat Baray Hama’, “investigates women related issues and broadcasts them for public awareness. Going into the details of each case study is the main purpose of this program.” Moby Media Group also indicated a shift towards investigative journalism, sharing, “For news, we want to move towards more investigative journalism, with a new show, but also in our current news programs.”

Faryad TV also offers a content breakdown different to the traditional model, reportedly broadcasting 0% news. With a strong drive to target youth, they instead concentrate on movies, music and series, with 20% covering the “hot topics of Herat.” This content structure reflects their desire to create a niche positioning as a channel for the local youth of Herat, rather than to mimic the generalist content breakdown of other channels.

Outside of news, a wide variety of genres are being broadcast, including politics, religion, entertainment, culture, education, and Islamic programming. Series continue to make up a large proportion of the content, with media managers that we spoke to reporting a range of 0-50% of their content in a week being made up of series and movies.

The most striking change from 2010 is the introduction and growing importance of sports programming to the scene. A high demand for sports in Afghanistan gained traction after two major events; it sparked off with the win of
Afghanistan's first Olympic medal in 2008 and was consolidated with the beginning of the Roshan Afghan Premier League (APL) in 2012.

Afghanistan won their first Olympic medal at the Beijing Olympics in 2008 through a bronze medal in the men's Taekwondo. The following Olympics, in 2012, were broadcast live around the country, and viewers avidly followed the Taekwondo matches. Their national star, Rohullah Nikpai, won bronze again, this time watched and supported by much of the country. His success in 2008 may have been the catalyst for such a national fervor for sports programming. With the introduction of the APL (see Focus Box 2) this enthusiasm was cemented into the media landscape.

Olympic success and the national unity brought about by the APL has been part of a story that has seen sports programming grow so significantly that a dedicated sports channel, 3Sport, began broadcasting at the end of 2012.

Today, a number of media managers reported sport or sport-related programming as one of their top 5 most important programs. Those media that we spoke to indicated that sport now makes up 5-10% of their content, and the broadcasting of international sports programs, in particular, football leagues, was an increasing priority amongst internationally procured shows.

The Afghan TV scene, much like in 2010, is still made up of both locally produced, as well as internationally procured programming. The following sections will provide a deeper analysis of what media managers are reporting the television landscape to look like in 2014.

Focus Box 2: The Roshan Afghan Premier League (APL)

The APL represents an interesting partnership between media and society, with the league itself co-founded by Moby Media Group and created by players selected after competing on a reality TV program on Tolo, named 'Maidan-e-Sabz', or 'Green Field'.

Now in its third year, the APL is made up of eight competing regional APL teams who compete in Kabul.

The league was met with incredible interest by the country, and has potentially contributed to the increasing demand for sports news and programming from the audience.

Moby Media Group's two channels, Lemar and Tolo, had the exclusive rights to air the matches, with their radio channels Arman FM and Arakozia FM providing live commentary.
3.2 **Main types of locally produced TV content**

The range of internally produced content amongst those media outlets we spoke to was from 0% to 100%, with a majority lying between 60-85%.

**The range of internally produced content was wider for TV outlets than radio stations**, with internal production accounting for 70% to 100% of content for radio stations, with the exception of one channel, that reported only 25% of content consisting of internal production.

**For TV, the majority indicated a model of on average, 80% internal production.** A few exceptions to this were noted. For example Haft TV, as a channel specialized in the broadcast of movies, has no internal production, and Faryad indicated they only produced 20% of their content. Music, series and sport, three genres that are typically procured from international sources, make up the remaining 80% of their content.

Amongst this internal production, the most commonly produced genres were:

- News
- Politics
- Religion
- Entertainment
- Education

These genres include shows such as political debate, comedy talk shows and game shows. Since 2010, little has changed in terms of the broad genres of internally produced programming. Rather, it is perhaps the quality of the content changing, with for example, Moby Media Group noting, *“From a quality point we are now much better, and for content, it just gets better and better.”*

Whilst most of these genres are composed of shows entirely designed and produced in Afghanistan, **locally produced entertainment is divided into two models,** either those shows entirely designed and produced in Afghanistan, for example ‘Shabkhand’, a comedy program on Yak TV; or those purchased under license internationally, and then produced in Afghanistan, such as ‘The Voice’ on Tolo. This is demonstrative of one key genre where internationally influenced programs compete with 100% local programs. Each hold a particular place in the landscape and can be very successful, with Shabkhand and The Voice both being extremely popular.

A smaller subset of programs are **designed internally, and yet produced externally.** For Arezo, this makes up a large 80-85% of their programming and is often motivated by the desire to move production to a more stable and safe
environment, particularly when it involves inviting guests to a studio. It may also indicate their desire to specialize as a broadcaster, and not a producer.

3.2.1 CHALLENGES AND LIMITATIONS

A number of key challenges were raised when discussing the barriers to locally producing programs that are currently purchased from international sources. Largely, this discussion focused around the desire to produce more Afghan series. For relevant outlets, had they the funds, they would increase internally produced series and rely less on foreign ones.

The cost was one such barrier, with media managers explaining that to produce a series in Afghanistan is very expensive. For example, Faryad noted, “If we had the budget, all the resources are available in Afghanistan, it is only an issue of money.” Another, Rah-e-Farda, indicated, “it is very expensive to internally produce series.” Whilst internal production may not be that expensive, in comparison to the western standards, it remains unaffordable to a majority of channels, when comparing with their advertising revenues per episode.

Others disagreed with the notion that the challenge is purely financial. They cited difficulties in finding good local actors, directors, and screenwriters. Moby Media Group reported, “The biggest challenge is to find not only actors that are good, but also those who are willing to appear on television. The second is finding screen writing capacity.”

This was noted in conjunction with a lack of facilities to produce such programs, as well as a lack of the technical capability. As Baran shared, “there is a lack of facilities to produce such programs.” A second manager, from Ayna reported, “We have issues with the technical side, such as cameras, and lights.”

Security was also mentioned as a concern for some, with Asia TV indicating that “there are skilled professionals available, such as cameramen working for NGOs, and the same for screen-writers...but security still remains the main issue.”

The major exception was Moby Media Group who indicated a strong dedication to increasing and improving their locally produced series, supported by the financial means to do so. Moby Media Group reported that around 80% of their content was designed and produced internally, with the remainder composed of purchased Turkish series, and a small number of programs that were under license but produced internally, such as The Voice. A few times a year, they also broadcast programs that they have bought the rights to, such as the World Cup Cricket.
Whilst Moby has produced and broadcast their own series before, their current strategy involves a committed effort to increasing the number of, as well as the quality of, Afghan series that they produce. They indicated a concerted effort to achieve this, noting, “Content changes include a heavy concentration on the development of Afghan series. We want the quality of our series to compete with Turkish series – that’s the level we want to reach. With the new ones we have planned, they might not be at that standard yet, but gradually we are aiming for that.” Most interestingly, they shared that popularity was not the only objective, “Yes our previous Afghan series have been popular, but it’s not just about that, but about quality.”

As is indicated by this example, even with a strong financial backing, there are persisting difficulties to achieving the quality available in internationally purchased shows, particularly in some genres such as series.

The trends of internal production in 2014 show no significant difference to the trends found in the 2010 study, indicating that whilst the desire for internal production to increase may remain, the financial, social and political constraints have made it difficult to change.

3.3  THE PLACE OF INTERNATIONALLY PROCURED TV CONTENT

3.3.1 CONTENT

A large proportion of television content in Afghanistan is still purchased from abroad, with a sizeable percentage of this composed of international series, and to some extent, movies.

However since 2010, Afghan TV outlets have started to venture into the purchase of new genres of internationally procured content: cartoons, documentaries and, most significantly, sport and music. As Shamshad shared, “we import some cartoons, dramas, and documentaries, mostly from Turkey and some from India and Pakistan.”

The rising interest in sport has been discussed earlier, and includes the procurement of international sport events, largely concentrated around football leagues. An increase in internationally sourced music, whilst already popular in 2010, is likely linked to the growing power of the youth audience. The youth of Afghanistan are increasingly exposed to world music trends through the Internet, satellite TV and in some cases, radio outlets that focus on contemporary music.
music. It may also be driven by an aim to attract women, a key audience throughout the daytime, who is also more likely to enjoy music.\textsuperscript{53}

As for changes amongst international series, in 2010, it was noted they were largely purchased from India, with a growing amount from Turkey, and some from Iran, the US and Korea. However in 2014, we can see media managers noting a shift in the proportion of series coming from different countries of source. From those media managers that we interviewed, series were mentioned to be primarily coming from Turkey; with others from Iran, India, South Korea, and even Germany.

**The rise of Turkish series as seen in 2010 has continued into 2014**, where Turkish series are now emerging as the key source of purchase, well surpassing mention of the Indian series that dominated Afghan television in 2010. The cultural resemblances of life in Turkey perhaps make these series more agreeable to the Afghan audience. Moby Media Group also noted, when talking about their Turkish series, that whilst there is “still resistance to foreign shows, there is not as much as in the past.” The Afghan audience, increasingly exposed to a variety of television programs from abroad, consistently and over so many years, may become more accustomed to the differences seen in programming purchased from abroad. With Turkish series not only culturally similar, but also offering interesting storylines, they appear to be taking over the current offering of international series.

In 2010 Iranian series were present, but rare, and were thought to have the potential for greater success, given the proximity with Afghan culture and language. However, it appears that in 2014 they still remain marginally important, and only in geographically significant regions, such as Herat. A number of factors could contribute to this. Primarily, the state restrictions on the production of Iranian television may make the storylines less appealing to an Afghan audience who has been exposed to the more exciting, stimulating stories amongst Indian and Turkish series. The Iranian accent and vocabulary may also contribute to deterring viewers outside of those more exposed to it, such as the population in Herat, or those how have some opposition to it.

**South Korean series**, as in 2010, also remain on the fringe, but are still present on the scene amongst some channels. Rah-e-Farda reported they chose to air South Korean dramas for three reasons, “One, they need less censorship or cutting; two, they are playing with swords, and horses and it is a way to motivate people into

---

sports; and three, there is less violence in these series, for example if someone cuts another, no blood is showing.”

3.3.2 PROCUREMENT TECHNIQUES

The acquisition of international programs is affected in a number of ways. Purchasing licensing for international programs was one such option. As Moby Media Group reported, “We don’t have any illegal broadcasting, and we are very careful about it.” Another, Yak TV indicated, “we pay licensing, but not all TV channels do.”

However, whilst this model did exist, the majority uses a variety of different means to illegally purchase and broadcast international content. Certain outlets shared that they recorded international programs off satellite. Others indicated they either download or purchase content off the Internet. Mehr, for example, reported, “55% of our content is downloaded from the internet as an individual.” Another, Setar-e-Sahar, shared, “We buy our HD movies and series online.” Asia TV stated, “Sometimes we buy off the Internet as a package, for example sometimes we buy a whole season of Iranian series.” Outlets also reported purchasing content in the bazaar, for example, Sharq TV noted, “30% of our content is bought in the bazaar,” and another, Ayna, explained “10% of our movies and music is bought in the bazaar, from Bollywood, Hollywood, Uzbekistan and Iran.” Sharq TV even commented that they were often “given programs for free or cheaply by Indian friends and connections.”

As these examples indicate, a lack of licensing is still ubiquitous in the Afghan market, and it appears that whilst some outlets are trying to rigidly apply copyright and broadcasting fees, on the whole they are still rarely paid. Yak TV, mentioned this as one of their biggest frustrations, “we pay licensing, but not all channels do. We need media and copyright laws.” However Haft TV also noted the troubles they faced by not having a license for their content, “by having no license it means that no big advertisers can invest, which means that we have no rate card strategy.” There are signs, however, of changes in the accepted functioning of the industry in this way. For example, broadcasting only programs they have the right appears to be fundamental to the functioning of a few lead outlets, such as Yak, noted earlier, Moby Media Group, and Khurshid. The process in which Wadi e Gorgha, a Turkish series that was airing on Tolo, was taken over by Khurshid, is one such evidence to these changes. Khurshid appears to have won the rights to broadcast the series, a very interesting example of a shift amongst some players in the industry really aiming to function in a professional environment.
Media and Copyright law remain a considerable challenge in Afghanistan, with licensing not being paid across the board, and therefore creating inconsistencies in the competition, but also creating issues for securing investment. However, the current method of broadcasting large amounts of unlicensed material from abroad may provide some transitional benefits. Whilst unsustainable, this system of procurement could be considered a provisional step, that accustoms the Afghan audience to a particular level of programming, in turn framing their expectations of their national outlets.

3.3.3 Nationalizing the international

Broadcasting foreign programs can require a lot of work by media outlets to make the content compatible with their Afghan audience. This process includes cutting, dubbing, blurring and occasionally subtitling.

As Arezo TV reported, “There are big costs, especially dubbing which has to be of high quality, and costs at least $2000 USD per episode. The vocabulary has to be intelligible for the Afghan audience, and this reflects the failures of our education system,” implying that the language cannot be too sophisticated for a largely uneducated Afghan audience.

Khurshid also shared, “It takes a lot of work, including changing text, dubbing blurring and cutting.” For Moby Media Group, they have an entire department looking at it, “For international shows, we have a QC department, who looks at words and sentences. We are very proud of our dubbing,” which is reflected in audience perception, with Moby often being noted as a leader in quality when it comes to dubbing. This has often been cited as a contributor to their high reputation. Whilst potentially not the most important element in decision-making, dubbing can influence audience members’ in their perception of an outlet, and in their subsequent program choice. For example, when asked why they prefer an outlet, respondents often shared responses that included their dubbing quality. For example, “I like Tolo because they have good dubbing of their drama series” (Female, 18-30, Jalalabad), “I prefer Tolo as it has good presenters, and they have great dubbing” (Male, 18-30, Mazar), and “Khurshid is my favorite as it has good dubbing” (Female, 18-30, Mazar). There was a tendency for this to be heard more often from the younger respondents, indicative perhaps of a greater demand for quality production from the younger audience. Having being exposed to modern television programming for a large proportion of their lives, as well as having greater access to the Internet, younger viewers are potentially more likely to expect programming to reach a higher standard.
The level of work required depends on a few issues, ranging from the channel’s reflection on what is appropriate, to the country of origin. For example for Faryad, that broadcasts Iranian series, the workload is less, “As it’s already in Farsi, we have no dubbing.” Rah-e-Farda mentioned that they prefer to show South Korean dramas because “they require less cutting, they act the same way with weapons and they are less violent.”

The amount of work required may also influence choice of content, with Sharq TV sharing, “We broadcast Urdu language movies, without a license, and with no additional cost because we don’t need to dub it.”

However, despite the challenges of making international content appropriate for the Afghan audience, procuring content from abroad remains an important source of content for Afghan TV. Regardless of the costs of dubbing, cutting and the like, it appears that international content can remain a fairly inexpensive alternative to the insecure, costly and difficult process of internal production.

4. Competition, Programming and Advertisement sales strategies

4.1 Understanding the Afghan audience

In general, media managers reported a pervasive lack of sophisticated knowledge on audience figures and reach. Most did not have information on audience share or even means to try and obtain it and those that did talked of very anecdotal means based on impressions. Additionally, some managers demonstrated a lack of understanding on the potential implications of this data and ways in which it could benefit them.

Externally gathered data

For those who did have methods for understanding their audience, a broad array of measures was shared. A few media managers reported using ratings or surveys conducted by external parties. For example, Arezo TV shared, “We use Altai ratings, and Promo-Fix ratings.” Another, RTA, noted, “We are ranked third by a BBC survey,” and yet another, Asia TV, “We know our TV reach by the BBC survey.” However, few had their own systematic methods for this.

Advertisers are also providing survey data, as Khurshid commented, “We don’t know our audience share, but we do know we are number two after Tolo, because of a Roshan survey and their ad investments.” Rabia Balkhi supported this idea, “From the contracts we get from clients, we know our audience.” There is a trend of outlets becoming exposed to audience/ratings data indirectly through advertisers who seem to be the main clients for this information at present.
Similarly, some outlets are given information from paid programming. For example, Faryad indicated, “We have no exact data, but know that we are first in market share in Herat. We know this from World Child paid programming, where they had five TV channels broadcast the program, and they then followed the audience.”

**INTERNAL METHODS**

In terms of internal methods for understanding their audience, most outlets spoke of unsophisticated and very anecdotal means: “We do observation surveys in shops and bazars” (Khurshid), or “We get feedback in the street or on the phone” (Sharq). For Ayna, they reported that the political results were indicative of their viewership, saying, “We don’t know our audience, but we know it is more than 3 million because we know 2 million voted for the party.” Moby, however, shared that they conduct surveys for their big shows with the aim of gathering feedback from the audience. Jawanan Radio also reported, “We don’t know numbers, but we get feedback from Facebook fans, phone calls, SMS, and focus group discussions every 6 months.” Yak TV also conducted a survey of mobile phone subscribers to judge the viewership of their coverage of the Afghanistan-Pakistan T20 cricket match in 2013.54

**Social media was a growing source of information,** with some media managers indicating that they get a sense of their audience by observing traffic on their social media sites. Some radio managers also indicated that they monitor the number of people that call them within their interactive programs as a way to gauge the scope of their audience.

However, even those managers undertaking quite significant studies feel like they don’t have a proper grip on their audience. For example, Killid noted, “I don’t know my audience. But what we do is a daily survey with a questionnaire designed to take 5 min, and to target people in the bazaar, street or shops. After one month, we do a synthesis to assess audience expectations. Every province has its survey. Plus we take thousands of calls during our show every day.”

Moby Media Group also reported a limited grasp on their audience, reporting that their own staff was the best measure they could use, “We have amazing staff with a good taste for the audience. We employ over 800 people, who come from all different parts of society, and they advise, make comments and are invested in improving our programs.” However, they have also made significant use of the Altai ratings.

---

54 Yak TV Press Release, Record Breaking 75% of Afghan Television Viewers Tune into 1TV Coverage of the Historic Twenty20 Afghanistan Vs Pakistan Cricket Match on Sunday 8 December 2013, 10 December 2013

**AFGHAN MEDIA OUTLETS IN 2014: CONTENT, POSITIONING AND PROGRAMMING STRATEGIES**

February 2015

Understanding the Audience

84
Salam Watandar, however, indicated a clear recognition of the value of audience feedback, sharing “we have introduced more feedback mechanisms, so that we can use audience feedback to improve. Many of the changes we made in content have come about through audience feedback. This focus is trying to get connected with what our audience needs.”

From the outlets we spoke to, it would appear the Internet sector is particularly savvy at understanding their audience and reflecting on it, in the most part supported by the easy access to online analytics. Pajhwok indicated they use a number of tools, “Google analytics, Google Adsense, Twitter analytics, Facebook data, but most importantly, we have a database with the details of all of our subscribers over the past ten years.” This direct interaction with their audience gives them the capacity to rapidly and consistently reflect on, and respond to, their audience’s behaviors and preferences in order to cater to their needs and desires.

What we can see from this range of answers is a persistent lack of audience data amongst media outlets in 2014. Whilst attempts are being made, many outlets appear to lack the knowledge on how to efficiently and inexpensively collect and analyze audience data, and then use it to inform their programming strategies.

### 4.2 Programming and scheduling strategies

Discussing programming and scheduling strategies with Afghan media was particularly interesting. A number of outlets highlighted using a “counterprogramming” strategy with Tolo in order to capture a greater proportion of the primetime audience. Counterprogramming, referring to the strategy of scheduling popular programs at the same time as your competitors in order to attract audience share away from them, was most often the strategy indicated by outlets, who reported, for example, “We use counter programming, for example we show wrestling programs at the same time as Tolo’s programs and series” (Setar-e-Sahar TV).

Some local outlets however, reported the opposite, choosing to broadcast their most popular programs when the big national outlets were not. For example, Arezo TV shared, “We broadcast our top shows when Tolo, Yak and Ariana are not.” By employing this scheduling strategy, local outlets ensure they can capture the local audience interested in their programs, without losing them to national heavyweights during their very popular primetime offerings and indicates a
resignation to the fact that they most likely would not be able to compete with the big players.

Numerous outlet managers shared that their main strategy was to “copy Tolo,” which includes assessing the schedule of Tolo, and broadcasting the same program just before, in the hope of capturing part of Tolo’s audience by making the same offering earlier. More broadly, they were also referring to attempts to assess Tolo’s strategy, and to try and compete by replicating it. This could help explain trends in, for example, the source country of series. If Tolo changes their tactic, other outlets may do the same, endeavoring to compete and keep up. If we look at the example of Wadi e Gorgha, we can actually see how successful the strategy of copying Tolo can be. Khurshid won the rights to broadcast Wadi e Gorgha, a Turkish series previously broadcast on Tolo in a competitive bid, outbidding Tolo in the process. Their audience ratings increased dramatically following this acquisition, fairly indicative of the success of their strategy to capture some of the Tolo audience by acquiring the rights to one of their popular programs.

A smaller number of media managers indicated, “Other TV channels are not seen as competitors” (Rah-e-Farda) and therefore they didn’t report using any particular strategy to compete for market share. Rather, these outlets see themselves as having such a niche offering that competition is not relevant to them. This included outlets such as Shamshad, who reported, “Very few stations are broadcasting in Pashto, and even fewer are reaching the predominantly rural audience Shamshad does.” Another, a radio station, indicated that they used their positioning as a youth-targeted outlet to differentiate their programming, “We offer youth vs. generalist programming and 60% of the population is young” (Jawanan Radio).

Innovation was also marked out as a programming strategy, with Jawanan radio, for example, employing the technique of asking themselves, “How can we be different?” in order to strategically compete. Saba TV shared their strategy of providing a unique offering; “We buy new series from the main companies in Turkey, because we do not want other channels to be broadcast it at the same time. We make sure it is only our right to broadcast those series.” In this strategy, we can see how providing innovative, new and unique series, is seen to be attractive to the Afghan audience. Khurshid also explained, “Tolo is more experienced, but we try to innovate more.”

Finally, some media outlets we spoke to employ smaller and different strategies to compete in the current market. For example, Haft TV indicated that they use bridging strategies in order to retain audience between programs. For example,
they broadcast music videos “We use bridging tactics - music from the movies is broadcast as clips between two movies in order to retain audience in the 10 - 15 min gaps.”
E. **Market Share According to the Ratings Data**

- This latest audience survey was run from November 10 to November 23, 2014.

- Among media users in the sample, on an average day, 62% turn their TV on, and 32% turn their radio on at some point during the day, compared to 68% and 39% respectively last year. If we assume that the panel represents about 80% of Afghans, for a total population of 16.2 million of Afghans aged 15 and above, this would represent approximately 8 million people who turn on their TV on any given day, and 4 million for the radio.

- The prime time for TV is still from 6pm to 10pm; it is less clearly defined on the radio, with a peak in the morning, from 6am to 10am, and a second one from 7pm to 9pm.

- As became apparent in previous surveys, the radio landscape is becoming much more diverse and spread out. Both audience share and reach for radio is spread out amongst an increasingly larger number of stations.

- A local radio station, Sanga, is within the top 10 most listened to nationwide, thanks to its 20% audience share in Kandahar. This evidences how volatile the ranking can be around and below the 1% audience share threshold.

- Tolo TV has lost about 4 audience share points compared to the November 2013 survey, but is still leading. The largest audience share variation observed is for Khurshid, which, with an increase of 6.6 points since last year, largely due to the channel's broadcast of Turkish series, Wadi e Gorgha.

- One of the main socio-demographic factors of variation is the native language, with regional results following linguistic characteristics: Tolo comes first in all regions but Pashto-dominated ones.

### 1. Introduction

As noted in Section C, audience research data has been made available regularly since 2010. The research capacity to perform and distribute results of regular audience surveys was developed thanks to the AMDEP project, and first results were published in August 2013.
During the audience survey itself, respondents were asked to list what station or channel they listened to or watched, at what time, and for how long (in minutes).

The last audience survey was run from November 10 to November 23, 2014, so gathered data about media consumption between Nov. 09 and Nov. 22, 2014.

2,371 unique respondents were interviewed, and 6,165 interviews were conducted (on average, 2.6 interviews per respondent). Based on the number of respondents, this would give a margin of error due to sample size of ±2% for national figures, ±4.7% for figures given for Kabul province (438 respondents).

This section will provide main results of the survey, but much more complete and detailed results are available at http://ratings.altaiconsulting.com.

2. Usage rate

The methodology excludes, on principle, non-media users from the sample. Among media users in the sample, on an average day, 62% turn their TV on, and 32% turn their radio on at some point during the day, compared to 63% and 39% respectively last year. At peak times, the maximum share of media users watching TV is 39% (at 8pm) and 10% for the radio (at 10am). As the charts below illustrate, there is no significant change in usage since last year’s survey.

The prime time for TV is still from 6pm to 10pm; it is less clearly defined on the radio, with a peak in the morning, from 6am to 10am, and a second one from 7pm to 9pm.

On average, respondents watch TV for 131 minutes per day (2 hours and 11 minutes) and listen to the radio for 45 minutes per day. These figures are almost exactly the same as one year ago. This is taking into account days where people did not watch TV or use the radio. On average, when people declared any TV consumption, it was for 164 minutes (2 hours and 44 minutes).
Table 7: Average duration of media consumption per day (minutes)

<table>
<thead>
<tr>
<th>Survey</th>
<th>2013-08</th>
<th>2013-11</th>
<th>2014-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>118</td>
<td>131</td>
<td>131</td>
</tr>
<tr>
<td>Radio</td>
<td>43</td>
<td>48</td>
<td>45</td>
</tr>
</tbody>
</table>

About 15% of the respondents have access to satellite TV, with a proportion naturally much higher in the mostly rural provinces which have less access to the terrestrial TV signal: Ghor (67%), Day Kundi (65%), Badghis (57%), etc.

3. Reach

In the following, reach is defined as the percentage of the population of TV (resp. radio) users who watch a given channel for any amount of time on an average day. An average daily reach of 21% for Ariana means that on an average day, 21% of TV users have watched Ariana at least once.

As mentioned above, on an average day, 62% of the panel turns their TV on, and 32% turn their radio on, for any duration. From this, we can't immediately infer a number of Afghans, as the panel represents only media users living in mobile phone coverage area. However, if we assume that the panel represents about 80% of Afghans, for a total population of 16.2 million of Afghans aged 15 and above, this would represent approximately 8 million people who turn on their TV
on any given day, and 4 million for the radio. In the following, we will take these approximate figures as a base for conversion.

3.1 Television

On an average day, Tolo reaches 75% of TV users (6 million), slightly lower than last year. The largest change in reach since 2013 is by far that of Khurshid, with an increase by 20 percentage points, from 9% up to 29%. This, as will be explained later, is largely due to the channel’s broadcast of a Turkish drama, *Wadi e Gorgha*.

![Figure 8: Average daily reach, TV](image)

Tolo News also increased its reach importantly thanks to its increase in geographic reach for its terrestrial broadcast, now covering the five major cities. Ariana, RTA and 1TV (Yak) show significant losses in this survey. It remains to be seen if these losses are a long-term trend or a particular issue with the period of the survey.

3.2 Radio

As became apparent in previous surveys, the radio landscape is much more diverse and spread out. Azadi dominates as usual, with on average 31% of radio users throughout the country who listen to the station at least once per day. Arman FM has seen the largest increase in reach since November 2013, with an additional 4.6 points, which leads the station ahead of the BBC. Bayan lost 4.7 reach points in the period.
4. Audience Share

In this document, we define *audience share* as the equivalent for media of a market share: for a particular TV channel (resp. radio station) it is calculated by dividing the total amount of time spent watching that channel (resp. listening to that station) by the total amount of time spent watching TV (resp. listening to the radio). The audience share can be computed on a particular segment of the population (along geographic or socio-demographic variables), and/or a given time interval.

4.1 Television

At national level over the period of the survey, Tolo TV has lost about 4 audience share points compared to the November 2013 survey. Lemar continues a slow growth and stays in second position, with now close to 10% audience share. The largest audience share variation observed is for Khurshid, which, with an increase of 6.6 points since last year, becomes the third most watched channel in the country.
The increase in Khurshid's audience can be explained at least partially by the fact that the channel secured the broadcast rights for *Wadi e Gorgha* (*Valley of the Wolves*), a popular Turkish drama previously broadcasted by Tolo: the largest increase in audience share for Khurshid is located on Sunday to Wednesday between 9 and 10pm, where the channel reaches more than 20% audience share.

Variations for other channels are smaller, and may be within the statistical margin of error, so should be taken with caution. 1TV (Yak) has lost 2.6 points since the last survey and falls behind Shamshad, which shows a slight increase (0.3 point). Ariana and RTA also lost about 2 points. Tolo News gains 1.1 points thanks to an increase in terrestrial broadcast area.

Other channels between 1 and 2% of national audience share include (in decreasing order) Noor, Tamadon, Noorin, and Arezo, followed, below 1%, by Haft, Ayna, Hewad and Zhwandoon.

### 4.2 By day of the week, hour of the day

Average daily audience share does not present a lot of variation during the week, but more during the day: while Tolo is ahead of all other channels throughout the day, Ariana comes close at 3pm. Khurshid’s peak of audience is between 9pm and 10pm, at the time of broadcast of *Wadi e Gorgha*. 

---

*Figure 10: National audience share, TV*
4.3  **The Wadi e Gorgha Effect**

To analyze better the *Wadi e Gorgha* effect, we can have a closer look at Khurshid's audience share by time and day. Clearly, the channel's audience rises sharply every weekday at 9pm, and drops dramatically on Fridays when the series is not broadcast.
To be noted as well, the show is much more attractive to male (across all age groups).

### 4.4 Socio-Demographic Characteristics

One of the main socio-demographic factors of variation is the native language. Among native Pashto speakers, Lemar comes first (31%), followed by Tolo (25%) and Shamshad (9%), Lemar and Shamshad being the two main Pashto-language channels, and as such, nearly never watched by Dari speakers (respectively 1.9% and 0.7% audience share).

Tolo is the most watched channel by Uzbeki speakers (42%), but they watch Ariana (16%), Khurshid (13%) and Ayna (5%) more often than the average.

Turkmeni speakers largely watch Tolo (62%), and watch Khurshid (12%) and Noor (5%) more than the average in Afghanistan.
### 4.5 Regional Results

Regional results follow linguistic characteristics: Tolo comes first in all regions but Pashto-dominated ones.

In the East (Laghman, Nangarhar, Kunar and Nuristan), Lemar comes first (33%) followed by Tolo (19%) and Shamshad (14%). Lemar finds its largest audience share in the South-East (Khost, Paktya, Paktika, 48%) where Shamshad is less present (10%). Similarly in the South (Helmand, Kandahar, Uruzgan and Zabul), Lemar is far ahead (43%), followed by Hewad, which gets 28% of audience share in Kandahar province. Unsurprisingly, Shamshad’s top provinces are close to the border with Pakistan: Nangarhar and Kunar (18% each), Paktika (17%), Paktya (12%).

All other regions are dominated by Tolo, but local channels do appear in their provinces albeit with less success than Hewad in Kandahar: Gharghasht reaches 11% in Khost, Ghaznawian 5% in Ghazni, Arezo (3%), Mehraban (2%) and Setar-e-Sahar (1%) in Balkh, etc.
Figure 15: Audience share by province, for selected outlets

Figure 16: Audience share by province (Arezo, Ariana, Lemar, Tolo News)

Arezo

Ariana

Lemar

Tolo News
4.6 **Radio**

Similarly to reach, audience share for the radio is much more shared across a larger number of stations. Killid stayed ahead with an increasing share. Arman climbed ahead of the BBC thanks to the largest increase in this survey (3.7 points). Ariana and Bayan both lost about two points. As in previous surveys, a local radio station is within the top 10 most listened nationwide – this year, Sanga, thanks to its 20% audience share in Kandahar – showing how volatile the ranking is around and below the 1% audience share threshold.

![Figure 17: National audience share, radio](image-url)
F. Audience behaviour and preferences: Drivers of audience choice

Key takeaways

- Outlets can have a favorable reputation, but not necessarily be noted as a favorite (e.g. RTA). This is usually linked to a dichotomy between the type of channel that the audience thinks they should support (for example, those that are strongly Islamic, very focused on education, or representative) and the type of channel they actually enjoy watching.

- Key contributors to brand preference include: high quality programming, (most often associated to Tolo’s dubbing and video quality); a strong signal in regional areas, (e.g. Shamshad in Jalalabad); a constant variety of new and exciting shows, (e.g. Tolo); consistency in program scheduling, (e.g. Tolo and Yak), and providing trustworthy news programming.

- With news programming, the capacity to have reporters on location and to provide professional video clips makes the difference (e.g. Tolo News).

- Drama series are loved for their storylines. Audience members were captivated by stories they could identify with, (eg. Wadi e Gorgha) and which offered them learning opportunities to reflect on their behaviors and relationships (e.g. Faraha). Often a strong storyline will be favored over quality. There is still a call for more Afghan series.

- Entertainment programming is enjoyed for its social and political commentary, (eg. Shabkhand, a comedic talk show on Yak), and for providing opportunity for the youth to learn and earn money (Lahza ba Lahza on Tolo).

- Women are enjoying the current offering of women’s shows but are looking for greater leadership examples and role models in them.

- Men prefer political debate programs that have the courage to ask the right questions, invite the right guests, address the right issues, and provide objective debate (eg. Tawdi Khabari on Lemar). Men requested that debate programming become more inclusive of Afghans from all over the country.

- For those who are outlet driven viewers, trust in an outlet is largely linked to how long it has been operating (e.g. RTA or Tolo) and is sometimes derived from habit but the audience is becoming more content driven than outlet driven.
A key question underlying the ratings results, is what drives the audience to be watching a certain channel at a certain moment? Whilst a lot of research into the Afghan media has been conducted, little has been offered to explain how it is viewers come to be watching a specific program, what has drawn them to it, and why they keep watching it.

The choice to watch a program can be affected by a multitude of factors, with two governing at the forefront: the pull or reputation of the outlet, and the pull of the program itself. That is, are Afghan viewers drawn to a certain program because of loyalty to the channel it is broadcast on; or is there a more nuanced explanation for program choice, driven by the content and performance of the programming? Also, what relationship does each of these factors have with one another? This line of inquiry guided the two sets of FGDs (brand testing and content testing).

This module was designed to provide depth and context to the data collected from the ratings survey by providing constructive information on what second tier outlets are doing well, and in what areas they could improve. Having one dominating outlet (in terms of market share) does not necessarily signify that smaller outlets are irrelevant, but rather, that they should concentrate on the strengths in their offering in order to build a solid following amongst a particular section of the audience.

This section will introduce our panel members’ perception of the outlets, before discussing their views on the strengths and weaknesses of the most popular programs on Afghan TV in 2014. Finally, it will conclude by juxtaposing these two driving forces, to understand their relative importance in decision-making processes.

1. **Drivers of audience choice**

A key question underlying the ratings results, is what drives the audience to be watching a certain channel at a certain moment? Whilst a lot of research into the Afghan media has been conducted, little has been offered to explain how it is viewers come to be watching a specific program, what has drawn them to it, and why they keep watching it.

The choice to watch a program can be affected by a multitude of factors, with two governing at the forefront: the pull or reputation of the outlet, often driven by a force of habit; and the pull of the program itself. That is, are Afghan viewers drawn to a certain program because of loyalty to the channel it is broadcast on;
or is there a more nuanced explanation for program choice, driven by the content and performance of the programming? Also, what relationship does each of these factors have with one another?

This line of inquiry guided the three sets of FGD, seeking to identify what was most influential in the panel member’s choices; and to evaluate to what extent the value of the outlet brand is significant, and to what extent an interest in the program content itself is more powerful in choice.

This section will introduce our panel members’ perception of the outlets, before discussing their views on the strengths and weaknesses of the most popular programs on Afghan TV in 2014. Finally, it will conclude by juxtaposing these two driving forces, to understand their relative importance in decision-making processes.

2. **Outlet: Audience Perception**

![Figure 18: spectrum of TV channels according to innovation and audience reach](image)

When it came to brand perception of the outlets, our interviewees recorded a variety of opinions on the outlets themselves, as well as on the importance of this perception to their program choice. This section will discuss some of the key
takeaways that emerged around brand preferences, and several central elements contributing to these preferences.

Some major consistencies existed amongst certain brands, particularly the first tier, with a huge diversity of personal interpretation seen for the others. What is interesting to note is that an outlet can be perceived strongly but not necessarily noted as a favorite.

There is a spectrum that also becomes apparent in terms of those that are considered innovative and those that are considered traditional (with both types having a place in the landscape), and those that appeal to a rule audience and those that appeal to an urban audience. This is delineated in Figure 18 above.

2.1 Tolo

Unsurprisingly, as the dominant player in the current Afghan environment, opinions of Tolo were fairly consistent. Tolo was considered as a strong and modern outlet that offered programs of high quality and variety. Across regions, gender and age groups, our panel members had a strong preference for Tolo.

This was for a multitude of reasons. Tolo was described as being popular, clever, loyal and strong, and largely without comparison, with respondents noting things such as, “If we compare to Tolo, other channels cannot do anything better” (Male, 41-50, Jalalabad), “We cannot compare to Tolo, because Tolo is the best” (Male, 18-30, Mazar). Respondents felt that Tolo is within a league of its own, at a level so different to the others that it makes little sense to try and compare.

In particular, Tolo was noted for:

Providing trustworthy and fast breaking news. Tolo’s news was respected for being trustworthy, which often extended to a general sense of trust in Tolo’s broadcasting. This good level of trust in their news was founded upon two main qualities: the fact that it is updated and reported swiftly, and the fact that they tend to deliver news and voices from all over the country. Respondents stated, “Everything is true on Tolo” (Male, 41-50, Jalalabad), “I like news on Tolo because it is broadcasting swiftly, they always tell the truth, and everyone can understand the news very easily” (Male, 18-30, Kabul). While this is a quality that was mainly acknowledged and favored by men in our sample, it was also acknowledged by women in some cases: “Tolo broadcasts breaking news very fast, and it is always accurate.” (Female, 31-40, Kabul). The professionalism of their journalists and anchors was also cited as a factor in the trustworthiness of their news. This is discussed further below.
Having a program schedule that consistently ran on time. This was a significant factor because not only did it indicate a certain level of professionalism but also, and more importantly, it allowed viewers to easily follow their programs. That is, if an outlet follows a clear schedule and sticks to it, then its viewers start to memorize their program grid and know what time to turn on the TV to catch the programs that they like. “I like Tolo as their programs are broadcast on their scheduled time” (Male, 18-30, Jalalabad), and “I tend to watch Tolo programs because they stick to a schedule, so it’s easy to follow their programs” (Female, 31-40, Kabul). Panel members shared that in their experience, other channels did not stick to their schedule, and were often running late in their programming, which made it difficult to follow their programs. For example, if a viewer turns on the TV to watch a particular program but the outlet is running late in its broadcast schedule, they may flip the channel while waiting and be pulled in by another show in the meantime. Similarly, if the schedule has changed, and the viewer is not aware of the new timing of the program, their viewership may be lost.

Providing high quality, professional broadcasting was well appreciated by the panel members. Tolo was seen as offering a level of quality not achieved by other outlets: “Other TV channels try to have the same programs, but they don’t have the same high quality as Tolo” (Male, 51+, Kabul). When respondents were prompted further, it became clear that this quality was often perceived through the strength of their dubbing. In fact, dubbing quality in TV series was seen to be a strong indicator of the quality of an outlet. However, quality was also gauged by the audience through the amount of money an outlet was perceived to have spent on a program. That is, if a program was seen to have been ‘expensive’ then it was seen to be of high quality: “I like Tolo as they spend a lot of money on their programs so they are high quality” (Female, 18-30, Jalalabad). Thus, it is not surprising that Tolo is seen as providing high quality programs. Taken further, audience members felt that an outlet that is able to spend a lot of money on their programs is most likely to be able to expose them to modern programs and the most recent programming from abroad. Thus, quality is linked to modern and state of the art programming.

A constant variety of new and exciting shows are in fact a major driver for the preference for Tolo. The audience members shared that they saw Tolo as making a constant effort to provide new programs: not only for variety, but also for innovation. That is, Tolo brought them new shows and genres that they had never been exposed to before. Many panelists shared this sentiment, for example, sharing “They bring new shows to Afghanistan, like Afghan Star and Voice
A strong signal in regional areas was clearly a differentiator for panelists in more remote areas and linked intimately to the idea of quality. These audience members reported that they felt the signal of Tolo was stronger, sharing, “I like Tolo because it has a stronger signal than other channels” (Male, 18-30, Jalalabad) and “It has a good signal and so I like Tolo” (Female, 31-40, Mazar). Evidently, if a channel’s signal is stronger than others, program clarity and the quality of the experience is improved, and therefore respondents were more likely to watch programs on this channel.

Broadcasting without fear of repercussion was also a strength in Tolo’s programming for some of our panelists, particularly men, who enjoyed news and political debate programs that were not appearing to be stymied by threat or fear of repercussion. Respondents indicated, “I like Tolo because it has modern technology, a good signal, and they are not scared of anyone” (Male, 41-50, Jalalabad) and “Tolo is not afraid of broadcasting anything” (Male, 18-30, Kabul).

Amongst the insecurity of Afghanistan, audience members felt that some outlets restrained their content or questioning of panel members, for example, in order to not outrage the government, powerful members of society, or other groups. Tolo, however, was seen as acting without fear, unafraid to broadcast challenging or controversial topics. For example, Tolo’s satirical program, Zang-e-Khatar, is a show of comedic skits that mock government corruption and inefficiencies, in an attempt to hold them accountable to the people. They report having received many threats from government officials, including death threats, investigations by the attorney general’s office, and arrest warrants. However, Tolo continues to air the program, standing by their aim and intentions. Not only does this make Tolo stand out as being above the rest, but it also contributes to the audience’s high level of trust in what they broadcast.

An interesting strength noted by the audience was Tolo’s frequent changing of sets and stages on their programs. Panelists shared comments such as “Tolo is the most innovative, they change their stage every six months” (Male, 51+, Jalalabad). By regularly updating the staging of programs, Tolo are imparting on the

audience an impression of being up to date, interesting and dynamic. It demonstrates to the audience an effort to reflect on ways to improve, and has Tolo appearing progressive, innovative and interesting.

The dominance of Tolo as a preferred channel in the FGD was relatively less evident in the respondents from Kabul however, with Kabul interviewees showing a greater range of preferences than those in Mazar and Jalalabad. While this is very likely linked to the greater variety of choice available to the audience in Kabul it could also be linked to the relative importance of the strength of signal. Respondents in both Mazar and Jalalabad referred to the strength of the signal as a big factor in their choices and preferences, for example noting, “The important thing for us is that it has a good signal and is clear. If the signal is not clear then I won’t watch it, as it’s bad for our eyes. Tolo has the best signal for us” (Male, 41-50, Mazar). Tolo was noted for their strong signal in these areas, potentially increasing their popularity, whereas in Kabul, the strength of the signal was rarely mentioned as an issue.

2.2 RTA

RTA was referred to with nostalgia, and affection. When asked to describe RTA, nearly all respondents, cutting across gender, age and regional divisions, were positive.

There was heavy reiteration of RTA as a strong, loyal outlet that serves the national interest; and there was some sentiment that it was innocent and honest. For example, respondents commented: “It has served the country,” (Female, 18-30, Kabul) and “RTA thinks about the country, it is patriotic, loyal and honest” (Male, 18-30 Kabul). Respondents enjoyed watching a channel that they felt was serving both them and the growth of their nation, and a channel that was invested in their progress. In a way, it arouses a sense of patriotism and loyalty.

Another noted strength of RTA was their capacity to represent the audience’s culture and religion. For example, respondents shared, “I watch RTA the most as it has Islamic programs in all languages” (Female, 41-50, Kabul), and “It has good Islamic programs, and broadcasts programs according to the rules of Government. It considers all people of the community, and broadcasts programs in different languages” (Female, 18-30, Jalalabad). That is, as it is the national broadcaster, it is seen to be representative of all cultures present in Afghanistan (which is likely to be significant in a fragmented media landscape like Afghanistan that has a history of outlets aligned on political or ethnic lines) and was perceived as being safe and trustworthy in terms of not deviating from people’s culture and beliefs.
RTA was also respected for having **women-specific programs that respected cultural and religious values**. Once again, this perceived strength needs to be understood in the context of a media landscape where some outlets have been pushing the boundaries in terms of gender constructions and roles, which has sometimes offended segments of the audience (for example, the “Afghan Media in 2010” study found that Indian TV series were criticized for influencing the opinions of women in an “un-Islamic” way). More specifically, their women-specific programming was seen to be informative for women, aiding in their education, while also respecting their religious values. As one respondent shared, “RTA has women’s programs which teaches us, but it ensures it educates us according to Sharia and Islam” (Female, 41-50, Jalalabad).

**RTA was also seen to offer information directly from the government,** and in a way, to be the mouthpiece of the government, given that it is the national broadcaster: “It broadcasts government activities with details that other channels do not” (Male, 41-50, Jalalabad), and “Most of their programs discuss the activities of the government, making us aware of these issues” (Male, 31-40, Mazar). That is, rather than being seen as an outlet that holds the government accountable, it is seen as uniquely providing the official line of the government and providing the facts and details of their decisions and policies.

However, RTA was also **notably critiqued for being old-fashioned**, and for not changing to suit the times. RTA was seen as stuck in a previous era. It was noted for failing to modernize, and to keep up with other channels’ innovation in quality and programming.

Moreover, a high level of regard for the channel did not necessarily translate into greater viewership, as aptly expressed by one respondent: “As it is the national broadcaster, we feel like we have a share in it, so it is our responsibility. However it is very old so I don’t really like it” (Male, 41-50, Kabul). This is an important distinction that has been noted in previous media studies by Altai in Afghanistan: just because a channel is respected or seen to be important, it doesn't necessarily translate into greater popularity.

### 2.3 Yak TV

Yak had **higher brand value amongst young males**, with a much higher tendency amongst this group to recognize Yak as one of the most famous channels in Afghanistan, with women much less likely to indicate Yak as a channel they would turn to, for any type of programming. However, the ratings

---

indicate similar levels of audience share amongst the genders (male: 1.8%, female: 1.1%).

Generally, Yak is considered a fun, innovative channel, most recognized for providing humorous shows. For example, respondents noted, “Yak is an innovator” (Female, 41-50, Jalalabad), and “They make people happy” (Male, 31-40, Mazar). Others shared, “Their programs are always happy” (Male, 18-30, Kabul), and that they have “very funny programs” (Female, 18-30, Kabul). This could quite possibly be linked to the high level of support Yak have for their current comedic talk show, Shabkhand, which had great success amongst our panelists, and in the ratings, with Yak receiving an average 3.5% audience during the hours it airs (as opposed to 1.4% audience share during primetime in general). This also suggests that Yak is potentially carving out a niche for itself in the market.

Providing a regular and consistent program schedule, something that Tolo is well known for, is also appreciated about Yak and this reliability is likely to bode well for their viewership. One woman shared, “Their program procedures are kind of like Tolo - their programs are well timed, and are consistent and reliable” (Female, 18-30, Kabul). Whilst she still preferred Tolo, because she felt like their service was of a higher standard, she appreciated that Yak was reliable in this way and mentioned that it led to her watching some of their shows from time to time because she always knew when they would be airing.

In 2010, when the last major mapping of the media sector was conducted by Altai Consulting, Yak was identified as the most promising contender to Tolo and was ranked as the fifth most preferred channel in the audience survey and the sixth best known, despite the fact that it was the most recent of the private channels at the time. Since that time, Yak has extended its broadcast area, worked heavily on its content over the past two years and rebranded its channel in the past year in order to remain competitive, appealing and relevant. As noted above, it has also carved out a niche for itself (whether intentional or not) and is seen as being quite professional, in terms of its program scheduling, by the audience. However, despite these great efforts to move forward, its audience share has steadily declined over the various rounds of audience research (and significantly, from 4% in November 2013, to 1.5% in November 2014). Audience members interviewed for this study also noted that they felt that Yak was failing somewhat to keep up with the industry- this was particularly noted by young

---

57 Average audience share of Yak, 8-9pm Thursday and Friday.
58 With primetime defined as 6pm – 10pm.
men in Kabul, who constitute Yak’s primary audience. Why this is the case is not entirely clear.

Perhaps part of the explanation lies in the fact that it is not currently airing any popular TV series during primetime, which has proven to be a driver of audience share in Afghanistan. It is not clear exactly why Yak’s offering of TV series has not taken off, but some of our respondents shared the opinion that Yak started to repeat some of their TV series and so they lost interest.

2.4 Khurshid

Khurshid’s was recognized by women and men alike for being a fun, entertaining channel. Having a wide variety of programming, offered at a high quality, was driving preference for this channel amongst its fan base.

A number of the panelists enjoyed watching Khurshid, citing it as their favorite, or most watched channel. For some respondents, spread throughout the sample, both in terms of geography, and gender, this was because Khurshid offered high quality viewing, in terms of signal and picture quality. For example, sharing, they “have entertaining programs, a clear picture and good signal” (Male, 41-50, Kabul).

Khurshid’s strategic purchase of the rights to air the follow-on season of Wadi e Gorgha, that had previously aired on Tolo, was a tactical decision that secured them a significant increase in their ratings data, as noted earlier. Taking a program that already had a strong fan base, as a way to attract a portion of the audience onto your channel, was a particularly powerful move by Khurshid, who managed to jump 6.6 percentage points in audience share from 2013 to 2014. This move, reflected in the ratings, should be expected to also influence the overall perspective of the audience of the channel, even if only to increase awareness of their offering.

For others, Khurshid’s strength lies in their program offering, in terms of having a wide variety of programs and, for those outside of Kabul, for their 24-hour broadcasting, and strong signal. These respondents shared comments such as, I like Khurshid because, “it broadcasts 24 hours a day, and they have programs for people of all different age ranges” (Male, 41-50, Mazar), “Khurshid has interesting and high quality entertainment and news programs” (Male, 31-40, Mazar), or “I like Khurshid because it has a good signal, and critically, they offer programs that are aimed at the improvement of the community” (Female, 18-30, Jalalabad). Interestingly, these comments show that a range of programs is liked, from their entertainment, to their news and social programming.
2.5 Ariana

Ariana, despite being well recognized across the panels for being one of the most famous TV channels, was less likely to be chosen as a favorite or most watched outlet. This is similar to RTA, who was well respected but not necessarily a favorite.

For those who did prefer Ariana, it was for a variety of reasons, but many included references to their capacity to cover the situation from all over Afghanistan. These reasons included, “I like Ariana as it broadcasts programs which inform us of the situation in the entire country” (Male, 51+, Jalalabad), “they have the most coverage, and provide truthful programs” (Male, old Mazar) and “I like Ariana because they have good educational programs, and factual news from all over Afghanistan” (Female, 18-30, Mazar).

Ariana was described by the panelists as harmless and inoffensive, that is, offering programing that is sensitive to cultural and religious norms, and as providing a loyal service to the country. That is, it is seen as an outlet that serves the national interest by representing all Afghans and adhering to their religious and cultural beliefs. This was particularly acknowledged by older members of our panel and shows that not much has changed in terms of Ariana’s reputation since 2010.

Much the same as RTA, Ariana was also well liked for providing good educational and Islamic programming. For example, one respondent shared, “They have question-and-answer educational Islamic programs, they provide good, factual news, they air the least music programs, and more educational programs” (Female, 18-30, Mazar). As we can see from this comment, Ariana is appreciated for offering more traditional, functional programs such as Islamic and educational programming. Even more so, it is liked for not offering music, a genre disliked by some of the more traditional parts of Afghan society. In this way, Ariana is holding fast to a traditional, cultural image of Afghan society, and reflecting this back to their viewers, which is well appreciated, and considered a strength by a certain group of the audience.

Others shared this sentiment, well expressed by one man in Jalalabad, when he shared, “Ariana has educational programs on Islamic subjects that Tolo doesn’t have” (Male, 41-50 Jalalabad). The implication here is that by being strong in Islamic programming, Ariana is distinguishing itself from other channels, including Tolo, and thereby carving out a niche for itself in terms of audience, instead of competing for the same audience as big players like Tolo.
Some respondents also attested to the **high quality** of Ariana's programming, particularly its trustworthiness, by comparing it to Tolo. For example, one man stated, “The news is up to date and trustworthy, like Tolo” (Male, 41-50, Jalalabad). As Tolo is often seen as a leader in terms of trustworthiness and accuracy, especially in its news programming, this is quite a compliment and demonstrates a high level of regard for the outlet. The ratings suggest that the high regard for Ariana, indicated amongst some of the panelists, could actually be much higher amongst the northern provinces, and in particular, some of the north-eastern provinces. Whilst capturing 5.6% national audience share, this jumps to 8.2% for the North-West. In the North-Eastern regions, this reaches 10.45%, second after Tolo. Their reach\(^{60}\) in these regions, with the exception of Badghis,\(^{61}\) are also significantly higher, as seen in Figure 19.

![Figure 19: Ariana's TV Reach](image)

2.6 **Lemar**

Across all regions and genders, there was an idea that Lemar was copying, or stealing from other channels. A number of respondents made comments such as, “Lemar steals the programs of other channels and broadcasts them in Pashto”

---

\(^{60}\) An outlet's reach represents the percentage of the population of TV users who watch a given channel for any amount of time on an average day. An average daily reach of 21% for Ariana, thus means that on an average day, 21% of TV users have watched Ariana at least once.

\(^{61}\) The exception of Badghis could be influenced by their relatively low ownership and viewership rates, identified in the 2010 Altai report, which in turn indicates lower number of respondents in the ratings survey. Badghis viewers in this rating round show a high tendency to be watching Tolo, with a reach of 96.9%.
(Female, 18-30, Kabul), and “All their programs are emulations of Tolo TV” (Female, 18-30, Mazar). Lemar, as the sister channel to Tolo, does broadcast some of the same programs as Tolo, but in Pashto. However, a large portion of their programming is also unique to Lemar, demonstrating either that viewers are only aware of the programming that is run on both Tolo and Lemar, or that there is just a general misunderstanding of the connection between Tolo and Lemar.

However, despite this, Lemar was still noted by panelists for being successful. It is particularly seen as a channel that is working hard on its offering and positioning and improving as a result: “It is constantly improving and is very successful” (Female, 51+, Mazar), and “It works hard and it shows in its offering” (Male, 41-50, Jalalabad). Panelists shared this view across regions, even in those that are not traditional strongholds for Lemar, implying that its reputation in this regard is strong.

Lemar was also noted for being bold and courageous and broadcasting without fear of repercussion: “Lemar is strong, and no one can prevent them from broadcasting anything” (Female, 18-30, Kabul). Not surprisingly, this was a quality appreciated in Tolo as well.

As can be expected, for viewers in the Pashto-dominated regions (such as Jalalabad), Lemar was identified as a favorite for the fact that it disseminates high quality programs in Pashto language: “Most of its programs are in the Pashto language, which can be easily understood” (Male, 41-50, Jalalabad), and “It broadcasts most of the Tolo’s programs, but in the Pashto language, which is easily understood by me” (Female, 51+, Jalalabad).

2.7 Shamshad

Shamshad was very well respected by panel members in Nangarhar, which constitutes the outlet’s core audience. All panel members in Nangarhar, apart from young literate women (who had a preference for Tolo, or RTA Nangarhar), recognized Shamshad amongst the top Afghan TV channels. The ratings reflect this preference, with Shamshad capturing 16.2% of the audience share in Nangarhar (compared to 2.2% nationwide).

Amongst their core audience in Nangarhar, Shamshad was respected and valued for a few primary reasons: like Lemar, the fact that they are a Pashto language channel bodes well for their viewership in the Pashto speaking regions. Shamshad was also perceived to have the best coverage of local news and to be a true local outlet that represents the people of the area. This was
shared with comments such as, “I prefer Shamshad as they provide their programs in our local languages, and most of the news is related to our region” (Female, 41-50, Jalalabad), “It broadcasts the news from the area very quickly, and it also has active news reporters in the region” (Male, 31-40, Jalalabad), and “It broadcasts news which is more related to the eastern region” (Female, 41-50, Jalalabad). Moreover, coverage of the local region was a criterion that emerged as being particularly relevant to respondents from Nangarhar when selecting their favorite news program. They were much more likely to identify this criteria than respondents from Mazar or Kabul.

Another reason for Shamshad’s popularity in Nangarhar lies in the fact that it is perceived to respect local traditions and values in its programming. This relates not only to types of programs and topics covered in their programming, but also to their presenters and the way they are dressed and the language that they use. For example, respondents shared, “I prefer it as all their staff are dressed according to our culture” (Male, 18-30, Jalalabad). As seen in previous sections of the report, this can prove quite significant for certain segments of the population in their choice of television channel, particularly in Pashto-areas.

In Nangarhar, the ratings indicate Shamshad (16.2%) competing with both Lemar (23.8%) and Tolo (21.8%) for audience share. As the two largest competing Pashto language channels in the region, it is reasonable to consider Shamshad in direct competition with Lemar. However, their positioning is very different, with Shamshad aiming to capture a more rural, traditional audience; and Lemar offering a relatively modern TV offering, as the Pashto sister-channel of Tolo. This is reflected in the ratings, with Lemar capturing a large share of the prime-time audience in Nangarhar, (28.7%, compared to Shamshad’s 16%) with their more modern offering of Turkish series, and entertainment shows.

Amongst other regions, whilst unsurprisingly not approaching the level of appreciation as in Jalalabad, Shamshad was still influential amongst some panel members. Shamshad was less consistently noted, but still referred to as amongst the most popular channels.

Much like the opinions shared of RTA, our Pashto respondents indicated that they felt proud of Shamshad as an outlet, because it really strove to represent them as a group of people. Our panelists indicated that they felt that Shamshad was dedicated to imbibing their culture and heritage, and representing them as a group. Whereas Lemar, on the other hand, they saw was simply a Pashto version of Tolo – it was a linguistic representation, but nothing else. For example, respondents noted, “Shamshad is independent, and representative of us as Pashto speakers. And Lemar, it just takes everything from Tolo, it is not doing anything for
 AUDIENCE BEHAVIOUR AND PREFERENCES: DRIVERS OF AUDIENCE CHOICE

February 2015

Understanding the Audience

113

itself or for us” (Male, 31-40, Jalalabad), and “Shamshad is trying to capture the Pashto people, it is designed specifically for us, whereas Lemar is just dependent on Tolo” (Male, 41-50, Jalalabad).

However, an interesting tension arose between the discussions, and the ratings, with Lemar gaining significantly more audience share than Shamshad. When bringing up this distinction, panelists admitted that whilst they were proud of Shamshad, and they therefore liked to talk up the channel, that, they “don’t actually like watching it” (Male, 31-40, Jalalabad). This is very similar to the phenomenon experienced around RTA: while a respect for the channel certainly exists, the audience is still driven to watch the modern, exciting offering of other channels.

3. CONTENT: STRENGTHS OF POPULAR PROGRAMS

The 2014 Afghan TV programming landscape offers viewers a large variety of genres, as well as content choice amongst these genres. This section was designed in order to understand the popularity behind the most popular programs, and the strengths and weaknesses of the different programs on offer, across a number of genres, as a way to shed light on the nuances of the programming landscape and thereby add breadth to the ratings data.

3.1 NEWS PROGRAMMING

3.1.1 TOLO NEWS

Tolo News was by far the most popular news program amongst our panelists, with the exception of respondents in Jalalabad, where, although Tolo News is still very popular, is surpassed by Shamshad News.

The speed at which Tolo News broadcasts breaking news is well appreciated; with respondents noting that they thought Tolo News did better than the others for, “broadcasting breaking news very fast” (Male, 51+, Mazar), and “providing news very soon after events” (Male, 31-40, Kabul). That is, Tolo is seen as the go to network for the most up to date and reliable news coverage. This quality was also seen to lend itself to high levels of trust in the news that is being broadcast.

The consistent broadcast schedule of Tolo, which was mentioned as a reason for Tolo’s popularity in general, was also mentioned as a reason for the popularity of their news program. Other channels were reported as often running late, which is frustrating for viewers who want to be able to plan their evening or day around their TV viewing preferences. One respondent explained: “I don’t watch other news programs as they don’t start on time, their time is not fixed like it is on Tolo” (Male, 31-40, Mazar).
Having professional presenters was also highlighted as a key differentiator, with respondents noting of Tolo, “the presenters know how to present the news and are professional, and so they speak confidently” (Female, 41-50, Jalalabad). Having journalists who are skilled and present the news with confidence and proficiency indicates a level of professionalism that engenders trust amongst the panelists and makes them feel like they are receiving unbiased information from a trustworthy and neutral source. Whilst a number of suggestions were noted as ways to improve Afghan news programming, most significantly, respondents noted they desired professional reporters, indicated with comments such as, “first of all we should have good reporters” (Male, 51+, Mazar), and “professional local reporters should be available in the field” (Female, 18-30, Jalalabad), indicative of how very important they considered this element to be.

Finally, panelists preferred Tolo News because they use video clips to document the news, as a form of validation. They shared comments such as, “it presents accurate news while showing video clips that belong to that news item” (Female, 51-60, Jalalabad), “they show images which prove the reality of the news” (Male, 31-40, Kabul), and “all of their news stories are followed with video documentary, which gives us proof” (Male, 51+, Jalalabad).

While many of the outlets use video footage within their news broadcast, Tolo’s use of video clips was seen to be superior. This is firstly because clips on Tolo are perceived as being of better visual quality, that is, they are brighter and more clear. Secondly, Tolo were said to weave clips well into their stories in order to highlight key points, whereas other channels are seen to sometimes just add video for the sake of having a visual, without really considering whether it is relevant or if it aids the understanding of the viewer. For example, one respondent noted, “For some other TV outlets, the video clips are not of a good quality. They show parts that are not interesting, and do not tell us anything about the news story” (Male, 18-30, Kabul).

As these examples have shown, the strengths of Tolo’s News programming is manifold. Tolo News is namely preferred for their capacity to broadcast breaking news very quickly, professionally, and with video proof from the location. One respondent summed this up succinctly, sharing, “They broadcast real and correct news on time, and it has both clear images and professional reporters” (Male, 18-30, Mazar).

3.1.2 Shamshad News

Shamshad news is well respected in Jalalabad, and whilst it emerged as the favorite over Lemar’s Pashto-language news service in the FGD, the ratings
indicate otherwise. During the evening Pashto news program, aired at 7pm, Shamshad captures 18.5% audience share, whilst Lemar, airing their Pashto news at the same time, captures 34.7% of the audience. As was discussed earlier, a discrepancy between the ratings and the rhetoric of the audience members can be explained by the pride and dedication to Shamshad as a channel they feel represents their culture, despite the fact that they actually prefer to watch Lemar’s offering. This pride was evident in the discussion around Shamshad’s news programming, with respondents from Jalalabad sharing that they felt Shamshad’s news offering was more representative of the Pashto-speaking community.

Whilst Tolo News was still by far the most popular news program in the region, those respondents who preferred Shamshad did so because it is focused on local news from the Eastern region and broadcasts in local languages. As was mentioned previously, this is a strong pull factor for respondents in Nangarhar. Respondents stated, “Shamshad is great because it has reporters in every corner of our region and so is able to give us full coverage of all the news happening in the region” (Female, 31-40, Jalalabad), and “Shamshad has accurate and clear news from all parts of Jalalabad, and moreover, has reporters in all parts of the province. Most importantly, they present the news in our local language” (Female, 18-30, Jalalabad). Shamshad was particularly noted for their capacity to provide news coverage of the local area, to a depth not achieved by other national outlets.

Whilst their biggest strength was consistently noted to be their better coverage and capacity in providing detailed local news, respondents in Jalalabad also shared that Shamshad news has a strong signal, and professional reporters. The strong signal ensures their news has clarity both visually and aurally, key to news programming, which is intently watched by the audience. Secondly, their reporters were noted for being skilled, professional, and in place all around the region. They were respected for presenting the news in a dedicated manner that imparted confidence in the reliability of their content.

### 3.1.3 Ariana News

Ariana, whilst less consistently preferred, still had a set of followers who favored their news programming. For these followers, Ariana were preferred for offering trustworthy news. This was linked to factors such as their news being unbiased, strong advertising of their news channel and a reputation for in-depth news.
Among its fan base, Ariana has a reputation for providing unbiased news: “Ariana, in all of the time they’ve been broadcasting, have never got anything wrong. They have never been caught broadcasting a story that wasn’t true, which Tolo has” (Male, 18-30, Kabul). Tolo was seen by some as chasing exciting, overhyped headlines for their news, regardless of it being factually correct; whereas Ariana was appreciated for providing a more balanced, objective view of the news that was underpinned by a committed effort to know it is correct before broadcasting it. For example, respondents shared, “Tolo is looking for the big headlines in what they want to broadcast, they don’t look so much at whether it is right or not. Ariana on the other hand, always makes sure they’re broadcasting the truth” (Male, 18-30, Kabul), and “Ariana broadcast the reality of events, and even though they broadcast breaking news very fast, they research the news and ensure it’s true before broadcasting it” (Male, 31-40, Kabul).

Respondents also shared that advertisements of the Ariana News channel led to greater trust in their news programming. Ariana has two channels, Ariana News and Ariana. Respondents noted that the advertisements run on Ariana about their news programming produced by Ariana News, built up trust in their capacity. The Ariana advertisements, differing from other networks, display their large studio and offices, with a big team working in it. This gave audience members the feeling of Ariana being well equipped, with a team dedicated to providing accurate news, and with a transparent process. Whereas for other channels, advertisements often concentrated on their most famous presenters, which didn’t give the audience insight into their process, or the idea of transparency.

Finally, trust was felt by Ariana’s dedication to providing in depth, accurate news, rather than just “hot” or exciting news. This was explained through a number of facets. Primarily, Ariana was seen as providing more detailed reporting on news events, rather than just headlines, achieved by having smaller advertising breaks throughout the program. Respondents shared, “Ariana gives the same news, but with more details” (Male, 18-30, Kabul). They were also seen as paying attention to all news in an equal manner, rather than concentrating on sensationalized topics that could be overhyped to attract attention. In this way, they are seen as “just broadcasting the truth” (Male, 41-50, Jalalabad). Respondents who shared this explained that whereas Tolo chooses to broadcast the most exciting news, and will make it into a larger issue through graphics and hype, Ariana cover every news story with the same approach, leading to a feeling of it being more balanced.
Finally, Ariana was preferred amongst these viewers for offering a wide geographic coverage of news. For example, panelists who preferred Ariana said, “They have truthful news from all parts of Afghanistan” (Female, 18-30, Mazar), and “They directly broadcast programs from inside and outside of Afghanistan. They also have reporters who arrive on the scene as soon as an event happens” (Male, 18-30, Kabul). Once again, we can see that a news channels’ capacity to provide news coverage, from the scene, and from all over Afghanistan, is a great strength for viewers. This capacity to offer greater external coverage could be reference to their unique offering of having a permanent correspondent in Washington, who covers news relevant to Afghanistan from the USA or Europe.

However, Ariana was also noted for paying little attention to their studio and design, presenting a rather dark image overall, which lay in comparison to studios such as Tolo and Yak who were commended for being bright, and have engaging design.

3.1.4 Yak News

Yak news was appreciated for providing a professional news service, considered similar to Tolo’s offering. The panelists found Yak to have particularly skilled reporters, who were professional and well-trained. The quality of the program was considered high, with a bright, well-designed studio, and a high quality picture.

In particular, some noted Yak as being unique in sending reporters to the location, to make special reports of ongoing events. For example, they shared that “If something is ongoing in a different province, Yak will be the one to send a reporter straight into the location to make a special report, and to continue updating us on it” (Male, 18-30, Kabul). The panelists appreciated this capacity to go straight to the source, and to provide them high quality reporting from the field. Their follow-up reports were also noted as unique, offering the audience insight into an event after the fact, to bear witness to any changes that may have occurred.

3.1.5 VOA News

VOA news, aired on RTA, was well loved for its capacity to broadcast a professional news program, run by experienced presenters that were shared to be “well known for their skills, all around Afghanistan” (Male, Kabul, 18-30). VOA’s presentation of global news was well appreciated, and their position, broadcasting from Washington DC appeared to lend greater trust in their programming, with respondents sharing that they thought because it was a “global news program,” that it was more trustworthy. Their competence in
covering international news, to a greater depth than some of the national channels, was noted as a particular strength of their programming. In particular, the depth to which they covered issues was preferred. For example, it was shared, “VOA give more background information to us before presenting an issue. These details make issues clearer to the people” (Male, 31-40, Kabul).

Their direct access to experts was noted as a unique trait, which was well liked by the audience, giving them the impression of a news program that could offer them the highest level of expertise. Whilst other channels also offered call-ins with experts, the video reporting via Skype offered by VOA, for example, was preferred, indicating a tacit trust gained by visualisation by the audience.

As it is a pre-recorded show, VOA is not looked to for breaking news. However, this element actually gave them the unique position of being able to offer more investigative reporting, adding to the depth of their reports. Panelists enjoyed the opportunity to know they could turn to VOA to get this greater depth, having heard the brief outline of the breaking news on other channels.

### 3.2 TV Series/Drama

After news, a second set of content that appeared as highly important in the panel members’ preferences was television series or dramas. As was elucidated in the Afghan Media in 2010 report, dramas, while at times controversial, are quite popular amongst the Afghan audience and an outlet’s offering of dramas has the potential to drive its popularity in general. This study confirms the continuing importance of TV series in the preferences of the audience.

In the content testing focus groups, while respondents were asked about a variety of TV series, they were shown clips of the following three:

**Fariha, on Tolo:** is a Turkish drama based around a young girl who lives in the basement of an apartment in an upper class neighborhood. Her father is the janitor of the building. The story centers around her life as she attends a private university on a full scholarship.

**Wadi e Gorgha, on Khurshid:** is a Turkish action show centered on a mafia group that is being pursued by the special forces of the government.

**Hürrem Sultan, on Yak:** is also a Turkish drama. It is a historical drama based on the Ottoman Empire. It tells the story of Sultan Suleiman trying to take on Alexander the Great, as well as improving the culture and economy of the cities under his rule.

In these focus groups, respondents listed a number of other dramas that they follow, outside of the above three, and the sheer number of those mentioned
further confirmed how very popular series are as a genre amongst the audience. The most referenced were: Karadayi and Qesa hai Zindagi on Tolo, Khosran Samar on Khurshid, Shamim Eshq and Zeman on Lemar.

The subsections below set out the main strengths of the three series aired during the content testing focus groups, as identified by the respondents.

### 3.2.1 Wadi e Gorgha (Khurshid)

Wadi e Gorgha was exceptionally popular amongst male respondents in our sample and the key feature for its popularity is its storyline. As noted in Section E, the ratings data supports this popularity, with Khurshid gaining 24% of the audience share when this drama is aired. The drama was originally broadcast on Tolo in 2013 and then Khurshid won the rights for the next season, which began broadcasting in 2014.

**The storyline is very much enjoyed because it is seen to be relevant and appropriate to Afghanistan.** This is because of two main reasons. Firstly, the series is set in Turkey and follows the story of a country's fight against a large mafia group that is vying with the government for power. Many of the men interviewed saw a parallel between this struggle and the struggle between the Taliban and the Afghan government. In that way, many felt that it reflected their own national struggle and thus, aroused their interest. Another element of the storyline that was liked and seen to reflect the realities of Afghan society, is the fact that the story is set in a Muslim country (Turkey) and reflects the tensions and struggles of retaining tradition in the face of modernization. When explaining their preference, men noted things such as, “It shows events that are relevant to our country, and our people should be aware of what is happening in our country” (Male, 18-30, Kabul), and “It is directly related to the political situation we are experiencing” (Male, 18-30, Jalalabad). Others shared, “It is the same as our country’s current situation, and the characters are successful in overcoming many of the tensions they face in this situation” (Male, 51+, Jalalabad).

What is also interesting about the popularity of the Wadi e Gorgha storyline is that it is less “intrusive” than those of some of the other dramas that are either on offer or have been on offer in Afghanistan. In 2010,62 it was found that

---

dramas that focused on families and romantic relationships were sometimes quite confronting for the Afghan audience because they dealt with topics that Afghans did not relate to or did not feel should be aired in a public forum. For example, storylines about girls falling in love and eloping with their lovers, or husbands cheating on their wives were seen as foreign to the lives of Afghans and somehow in contradiction with their values. It was also found that something as simple as including scenes that take place inside a woman's bedroom or kitchen could be confronting for the audience as these are spaces that should be very private and not open to everybody. Wadi e Gorgha, by focusing on an essentially mafia storyline, moves away from these kinds of storylines and offers something that is seen as more acceptable within the bounds of Afghan culture and is even seen as relevant. Large amounts of violence or illicit activity, while sometimes controversial in other countries, are not necessarily seen as problematic in Afghanistan. For example, one respondent shared, “Fariha is a love story and it directs people in the wrong way, but Wadi e Gorgha is showing politics and policies of modern countries in the world” (Male, 18-30, Jalalabad). These views were also shared by some women in our sample: “It does not have several marriages of one character, like other dramas, and besides that, it also teaches us modern politics” (Female, 41-50, Kabul), and “There is no challenging elements in this drama like there is in Fariha- instead, it is compatible with Afghanistan’s current condition” (Female, 51+, Kabul).

As Wadi e Gorgha follows the nation’s struggle to push back the mafia, it trails a very nationalistic theme, with one of the main characters charged with infiltrating the mafia in order to bring them down for the country. This sense of patriotism was also quite appealing to the audience. The impression is that patriotism appeals to the audience because of their desire for media to foster a national identity in Afghanistan and contribute to national unity- something that was also identified in 2010. Respondents said, “This is a political drama, that teaches us homeland love” (Male, 41-50, Mazar), “it shows the experiences of war, and teaches loyalty to one’s country” (Male, 51+, Mazar) and, “it shows loyal and patriotic people who serve their country” (Male, 31-40, Jalalabad).

Whilst the dubbing on Khurshid was noted by audience members to be of a lower quality than when it was aired on Tolo, the devotion to following the storyline appeared to be of greater concern. This will be discussed in greater detail in Focus Box 3, when looking into pull factors for the audience.
3.2.3 Fariha (Tolo)

Fariha was definitely the series that was strongly preferred by female respondents across regions and age groups. Our ratings data also indicates that, achieving 46% audience share, and reaching a higher percentage of women in particular during its airing in primetime (59% of the female audience, and 40% of the male).

Many women also reported watching the repeats of the show throughout the day.

Fariha follows the life of a young and beautiful girl from a poor family, who lives in an upper class neighborhood, attending a prestigious university by virtue of a scholarship. Fariha lies about her background, posing as a wealthy and privileged girl, and the series follows the story of her falling in love with a wealthy boy in her class, underpinned by her struggles derived from the fact that the relationship is formed on her lies.

Women appreciated the simplicity of the storyline of Fariha and the opportunity it affords for learning about human interactions. The plot, following Fariha through her daily life, including her interactions with her family and her friends, and the implications her lies put her in, are appreciated as learning opportunities for Afghan women. While some of the concepts of the show may seem contradictory to the local culture (falling in love with someone out of your class, lying and deceit), they are seen as lessons on what to avoid, rather than as promoting unfavorable behavior. Women made statements such as, “This series offers us a guideline for living, we learn good lessons that can help us in our lives” (Female, 18-30, Kabul), “it teaches us the right behaviors to have with both our family, and relations outside of the family” (Female, 41-50, Jalalabad), “it teaches love and sincerity between family and friends” (Female, 31-40, Jalalabad) and “It has positive lessons for me based on my culture. It teaches me how to best live with people in my family, and in the community” (Female, 18-30, Jalalabad). It is interesting to note that Wadi e Gorgha is appreciated for its storyline by men and Fariha is appreciated for its storyline by women- men connect with concepts of courage, power, serving a greater interest, and societal interactions, whereas women connect with concepts of love, fidelity and family.

---

63 Tolo’s average audience share, Saturday to Thursday, 8-9pm.
Fariha was also appreciated for providing a high quality viewing experience, particularly from the perspective of high quality dubbing. The quality of the dubbing of foreign TV series into Dari has emerged as an essential indicator of the quality of a TV show amongst the Afghan audience and it appears to be of more importance to women than men in our sample. That is, women are more likely than men to identify that as a reason for their preferences.

While women were more likely to be watching Fariha and to identify it as a favorite, those men who preferred Fariha expressed similar sentiments to those identified above. That is, they highlighted the learning possibilities it affords them and their families. For example, they noted, “there is no violence and it teaches us lessons on how to deal with family issues, and how to behave in society” (Male, 51+, Jalalabad), and “The negative points in Fariha can teach Afghan women lessons, by demonstrating to them the outcome of bad decisions, and encouraging them not to do the same thing” (Male, 18-30, Kabul), and “There is a lesson for families in this drama. The positive points give us examples that we can teach our children” (Male, 31-40, Kabul). This is important to note as previous studies have found that when a family consumes media collectively, the male head of the household often interprets what is being viewed for the rest of the family. Some men in our sample identified that when they watch Fariha with the rest of their family, they highlight the moral lessons for their wives and children and encourage them to reflect on how these lessons can be incorporated into their own lives.

3.2.4 Hürrem Sultan (Yak)

Hürrem Sultan was much less popular amongst our sample in the FGD. However, Yak’s audience share increases when Hürrem Sultan is aired, from its average rate of 1.5% to 2.4%.  

The storyline was once again the main pull factor for those that favored this show. In particular, respondents noted that they enjoyed the fact that it “shows us the history of Islam in the past in all of its greatness” (Male, 18-30, Kabul). This was particularly identified by young Afghans in our sample, and particularly by young men. It gives rise to the impression that Afghan youth are attracted to examples of a time when Islam was great and that perhaps this is linked to issues of identity. This is supported by previous findings that highlighted the need for role

---

64 Average audience share for Yak, 2.30-3.30pm, Saturday to Thursday.
models for Afghan youth on the media. Learning of Islamic history through a drama was attractive for some of the audience members, who found that “it can be easier to learn history when it is in the form of a drama” (Female, 18-30, Herat).

Women who favored the show also indicated a sense of identifying with the characters as role models. As the show also follows the wife of the Sultan, it also explores the world of women in this Islamic empire. Women across age groups made statements such as “the women on the show demonstrate how a good Muslim woman should behave with elders, and how she should be dressed” (Female, 18-30, Jalalabad).

The series was noted however, for being slow-moving, and thus loses some of its appeal to an audience accustomed to fast paced, exciting dramas with storylines that constantly provide new peaks of interest. For example, one respondent noted, “It is very good quality - it has good dubbing, and good actors and I like the history - but I lost interest, it is very long, and it was not exciting, the storyline just dragged on” (Female, 18-30, Herat).

3.2.5 Outlet strengths in drama programming

**Tolo**

Tolo was unanimously recognized as the most innovative outlet in terms of TV drama. This was for a number of key reasons.

Firstly, their **dubbing quality** was highly praised by respondents. They shared comments such as, “They have such good dubbing that sometimes you cannot know that the series has been dubbed” (Male, 18-30, Kabul), “Their dubbing department is very successful, and the technology they use is very professional” (Male, 18-30, Jalalabad), “the dubbing is great, and the voice is compatible with the characters” (Female, 18-30, Kabul), and “the dubbing of dramas are very good, and they select the voice of everybody according to his or her face and character” (Female, 51+, Kabul). Whilst this may not be the predominant driver for viewers, as will be seen in the Wadi e Gorgha example, where storyline was seen to trump dubbing quality, it is still quite a significant factor in audience choice and preferences.

They were also well respected for their capacity to **innovate**, in terms of constantly bringing new dramas to Afghanistan. As has been well covered, storyline is of key importance to the Afghan viewer, who is driven to watch television series by a storyline that captures them. Tolo is recognized for bringing new and interesting series, with strong storylines, into the mix. Panelists shared, “they change their programs every 6 months” (Male, 51+, Jalalabad), “I like Tolo series because they bring series to Afghanistan that we have never seen before” (Male, 41-50, Kabul), “Every 6 months they change and start
broadcasting innovative new series. They bring dramas here which are currently being played in Turkey” (Female, 18-30, Jalalabad), and “They buy and broadcast new educational series“ (Male, 18-30, Mazar).

Moreover, innovation was recognized and appreciated in Tolo’s capacity to be the first outlet to produce Afghan series, with praises such as, “Tolo is the first TV that produced series locally” (Male, 18-30, Mazar), and “Tolo make some Afghan series as well, and these show us the culture of Afghanistan” (Female, 18-30, Kabul). Given the audiences’ preference for storylines that respect and reflect their culture, as seen above, producing dramas in Afghanistan that reflect Afghan stories sets Tolo apart from the rest. Moreover, some of our respondents shared that they enjoy Afghan series for their capacity to teach them something about their own culture, acting in a way as a conduit for teaching and learning about their own country and culture.

All of this, Tolo’s strengths in their capacity and dedication to produce innovation, high quality, and local series were seen to be possible by their financial strength. For example, respondents shared, “Tolo have spent a lot of money purchasing new and exciting dramas” (Male, 51+, Mazar), “Tolo has a solid financial situation, which lets them buy great series, and also do great dubbing work” (Male, 18-30, Jalalabad), and “They are spending a lot of money to broadcast new series, and also to try and make Afghan dramas” (Female, 18-30, Jalalabad). The audience members appeared to respect the financial outlays Tolo were willing to undertake in order to provide them with the very best.

Despite Tolo’s absolute dominance in terms of being innovators in the drama genre, both Khurshid and Yak had a few supporters amongst our panelists.

For those who identified Khurshid as most innovative, their capacity to broadcast new programs saw them in competition with Tolo. For example, respondents shared, “Khurshid buy new series and are in good competition with Tolo TV” (Male, 18-30, Mazar), and “they do not broadcast repeat dramas, and when Wadi e Gorgha stopped on Tolo, they made the innovative step and started to broadcast it” (Male, 51+, Jalalabad).

These responses also highlight another point: the importance of offering new drama and not repeating ones that the audience is already familiar with. This has also emerged as a key factor in being popular in the drama/TV series genre, a genre that has the potential to drive ratings.

Also, Khurshid’s decision to air Wadi e Gorgha after Tolo dropped it was an extremely strategic move and yet another indicator of the importance of TV
series to audience share. Taking on a series that not only had an existing following, but that was associated with a strong outlet like Tolo, raised the profile of Khurshid. This is reflected in the ratings data, which, as seen earlier, jumped a large 6.6 points in audience share from November 2013 to November 2014.

As is clearly indicated amongst these examples, our respondents are strongly compelled to watch series by a storyline that appeals to them, that fits with their daily realities, that offers a learning opportunity, and which doesn't drift too far from their traditional and social norms. The audience members we spoke to indicate a high preference for high quality, innovative offerings that allow them access to popular shows outside of the country, but at the same time appreciate those series that are produced in Afghanistan.

3.2.6 THE FUTURE OF DRAMA PROGRAMMING

The critiques heard from the audience in 2010 remain consistent today. Cutting across genders, all regions and education level, respondents called for television dramas to be in line with the Afghan society and culture. The demands for “dramas that are compatible with Afghan culture and that are educational” (Male, 18-30, Jalalabad) were heard across all of the panels.

This desire for series to be more aligned with their Islamic culture was highly linked to the educative potential of dramas. Respondents noted requests such as, “They should be broadcasting Islamic series to encourage our children to study” (Female, 51+, Mazar), “Series should be in touch with our culture, and enhance the knowledge of our people” (Male, 41-50, Kabul), and “they should broadcast Islamic and Afghan dramas. The mind of a child is like white paper and must be filled with great things” (Female, 41-50, Kabul). However, despite these criticisms that persist from 2010, for dramas to be more Islamic, more Afghan, and more conservative, series remain incredibly popular. For example, Fariha is somewhat controversial in its storyline, telling the love story of a young girl. It does not teach Islamic, or conservative lifestyle ideals, apart from indicating that bad morals can get you into trouble. Yet, it remains incredibly popular amongst the Afghan audience who claim they want to see more traditional stories. Again, not very different to the findings in 2010.

Even more so, respondents shared that they wanted to see a greater number of series from Afghanistan itself, which would counter the need to blur-out or cut scenes which were offensive. For example, panelists shared, “They should provide series which are from our country, not other countries, because each country should

---

make series for their own people” (Male, 18-30, Mazar), “Dramas should be made in Afghanistan to develop the capacity of our actors, and that way we can produce better dramas, for less money” (Female, 18-30, Kabul), and “Series should be concentrating on traditional Afghan stories, because they would provide better education for our children” (Male, 51+, Kabul).

However, whilst the demands remain consistent, changes in the industry have occurred, with the slow emergence of more Afghan produced dramas.

### 3.3 Entertainment

The entertainment genre remains another dynamic and vibrant sector of the Afghan TV scene. For the purposes of this report, “entertainment” refers to a mix of game shows, cooking shows and talk shows. That is, programming focused on entertainment outside of TV dramas.

In the content testing focus groups, while respondents were asked about a variety of entertainment shows, they were shown clips of the following three:

- **59 Minute Duel, on Ariana**: is a cooking show where contestants come in to compete with the chefs on the show. Each episode, different Afghan personalities are brought in to judge the program.

- **Lahza ba Lahza, (Minute to Win it) on Tolo**: is a game show where the contestants are given an arbitrary task to complete in sixty seconds. They have the chance to win prizes up to one million AFS. Each of the tasks is designed to require minimal skill, allowing anyone the chance to win.

- **Shabkhand, on Yak**: is a personality talk show. A comedian, Asif Jalali, hosts the show which has segments on jokes about current affairs, as well as an interview segment where interviews are conducted with celebrity guests.

The panelists reported a fairly equal split between preferring either Shabkhand or Lazha ba Lahza, with 59 Minute Duel far less selected, and only amongst women. Interestingly, the entertainment genre was the only genre where some respondents indicated they had no interest at all in watching these types of programs. For example, one noted, “I don’t trust them and I don’t follow them, I have a lack of interest in these programs” (Male, 18-30, Kabul). Another shared, “Before I used to watch that program [Shabkhand] but now I don’t like to watch it. I liked it previously as it was educational, and entertainment shows are no longer educational” (Male, 41-50, Kabul). For these viewers, who were all men, entertainment programs were a waste of time, as they have no interest and are considered void of educational opportunity.
Outside of those shows aired during the content testing FGDs, a number of other programs were mentioned as favorites amongst the panelists. These include: Noqta-e-Josh on Khurshid; 100 Sania, Zang-e-Khatar, and Qab Goftago on Tolo; and Shoma wa Million on Yak.

### 3.3.1 Shabkhand (Yak)

Shabkhand was an exceptionally popular program amongst the panelists. As a truly entertaining program, the panelists enjoyed Shabkhand for its humor. Receiving 3.5% average audience share when aired, this signifies a significant jump from the 1.4% Yak usually receives during primetime viewing.

A large part of the program’s value for the audience lies in its presenter, Asif Jalali: “His face and character are funny, and all of his acts and speeches are funny. It is a really entertaining program” (Female, 51+, Kabul), and “The presenter is a great comedian and I love his character” (Male, 18-30, Jalalabad). He was also noted for finding the humor in daily life and in daily challenges, “he manages to make a joke of all of the gaps that exist in the community. It makes the presenter a great comedian” (Female, 41-50, Kabul), and “Asif Jalali is a comedian who manages to present negative points in a comedic way, through irony” (Male, 18-30, Mazar). The humor Jalali brings into Afghan households is loved not only for its pure entertainment factor, but also for being intelligent humor that allows them to laugh at the challenges they may face in their daily lives.

Of course, the general capacity for the program to entertain the panelists, and bring laughter into their households was also a primary reason indicated for their preference. For example, some noted, “It is completely comedic and brings happiness to the people” (Male, 18-30, Jalalabad), “in general it keeps us happy and brings us fun and entertainment” (Female, 31-40, Mazar) and “the presenter is bringing laughter to the audience at every moment, and so it is a good entertainment program” (Female, 18-30, Kabul).

The guests that are featured on the show are also well appreciated. The audience members appreciated being given the opportunity to learn more about the personalities who were a part of the show, giving them greater access to

---

66 Since the FGD and ratings survey, the presenter of Shabkhand has changed, and is no longer Asif Jalali, who was so well-loved by the audience.
Afghanistan’s most well renowned people. For example, one respondent shared, “We don’t know anything about their life, how they live, what their character is like, or the nature of the person” (Male, 18-30, Kabul).

3.3.2 Lahza ba Lahza (Tolo)

Lahza ba Lahza was also well liked amongst the panelists, while not quite as popular as Shabkhand, it still achieved a high rating. Shown at 8-9pm on Fridays, it receives around 45.5% audience share.

As a game show that requires little skill, but offers great opportunity to the young contestants to win cash prizes, Lahza ba Lahza was appreciated for providing educative stimulation to the young generation; that is, encouraging them to think constructively, and giving them hope for success: “I like this program for its ability to expand the minds of the youth” (Male, 51+, Kabul), “this program is very encouraging to youth” (Male, 41-50, Mazar) and “I enjoy it for teaching the younger generation new techniques, while also being entertaining” (Female, 18-30, Jalalabad).

This was also seen in the preference for Lahza ba Lahza because of its capacity to provide opportunities for the youth of Afghanistan, not only through learning potentials, but also in giving them a chance to earn money. Some panelists noted for example, “It is great for developing the capacity of our youth, and for providing financial support for them too” (Female, 51+, Kabul), “it is useful for the youth as it teaches them something, and at the same time they are given the opportunity to earn money” (Female, 18-30, Mazar), and “It helps the youth financially, which encourages them to participate” (Male, 31-40, Jalalabad).

Finally, as an entertainment program, Lahza ba Lahza was also remarked on for providing enjoyment and fun, and giving opportunities for the family to enjoy themselves together. For example, respondents noted, “I like it for its learning opportunities, and for creating fun between friends. It allows for intimacy and friendship at home by giving us the opportunity to play their games together at home” (Male, 18-30, Kabul), and “It is entertaining, and at the same time it is educational” (Male, 18-30, Jalalabad). Viewers of Lahza ba Lahza can participate in the program by mocking up the challenges amongst themselves when they are watching, providing a sense of interaction, fun and engagement. Some viewers enjoyed this opportunity, and the capacity it can build, offering new ways of engaging with friends and family at home.
3.3.3 **59 Minute Duel (Ariana)**

59 Minute Duel was significantly less preferred, but still had good popularity in the FGD, amongst women in particular. The ratings however, indicate that whilst women may prefer the program, 59 Minute Duel is largely watched as a family, with men and women receiving similar viewing rates, attracting a total of 6.1% audience share. This program was preferred mainly for what it taught the panelists, rather than for its pure entertainment value.

As a cooking show, Duel was clearly preferred for its capacity to teach new cooking techniques, but more specifically it was liked for providing **fast and economic cooking techniques, making it realistic for many of the viewers.** For example, women noted, “it is good for teaching us how to cook new foods for a lower cost” (Female, 18-30, Kabul), “It is an educational program which teaches me about new foods I can cook. I learn from this program how to cook meals in a short time, and in economical ways” (Female, 51+, Mazar) and “it teaches how to cook different food, in a short period of time” (Female, 51+, Jalalabad). Men with a preference for Duel also indicated the same, sharing, “It teaches us how to cook new dishes, and besides cooking, it also teaches us ways to save money” (Male, 51+, Mazar).

It also introduces the audience to new ingredients, and discusses **health and nutrition issues**, of interest to some women. For example, respondents shared, “This program shows us the ways we should cook to make best use of vitamins, protein and other elements that are contained in the food we are making” (Female, 51+, Jalalabad). That is, women expressed enjoying the program for its information on topics that are relevant to their daily lives and that relate to their ability to take care of their family. As noted earlier, the ratings indicate that the program is watched as a family, and so these lessons are actually imbibed by the family as a whole, with women just more likely to express their appreciation for this type of programming.

---

67 Ariana's average audience share, Friday 8.30-9.30pm.
3.3.4 Outlet strength in entertainment programming

Tolo was again considered, by significant margins, the most innovative in their entertainment offering by our panelists, but with Yak and Khurshid also indicated to be leading the charge by a selection of respondents, more so in Jalalabad than other regions.

**Tolo**

Much as in the other genres, Tolo was seen as doing particularly well at providing a variety of entertainment programs, which are always fresh, exciting and new. Respondents shared that they preferred Tolo for entertainment because, “Every 6 months they change their entertainment programs and bring new ones. Also, they invite interesting artists onto their entertainment programs” (Female, 51+, Kabul), and “they are always creating new entertainment programs” (Male, 18-30, Mazar). One respondent even noted, “Every new [entertainment] program is started on Tolo first” (Female, 41-50, Jalalabad). Tolo’s tendency to invite new, interesting and captivating guests was also highly appreciated. Their position in the market may offer greater capacity to attract interesting guests.

Tolo was also noted for offering entertainment programs that are also educative, with respondents sharing, “Besides entertainment, their programs also teach us interesting things” (Female, 18-30, Kabul), “Their fun programs are also educational and helpful” (Female, 18-30, Mazar) and “They have more comedic programs that keep people happy, but that also help to educate the youth” (Male, 51+, Kabul). Lazha ba Lazha is one key example, but another of their game shows, 100 Sania (100 Seconds), which has teams of contestants working together to answer questions with the aim of winning money, was also mentioned in this regard.

**Khurshid**

For those who identified Khurshid as most innovative, a variety of reasons were cited. They were seen to be progressing in the industry, and noted for creating programs that aim to keep the government accountable by using comedy to point out weaknesses and flaws. For example, respondents shared, “they have good, funny, educational programs in which they use satirical comedy to make a point” (Male, 18-30, Mazar) and “they have critical and entertaining programs that remind officials of their responsibilities, and the gaps which they still have to fill” (Male, 51+, Jalalabad). This is an interesting finding, given that in 2010 it was found that some of the “critical” shows that keep the government accountable had a tone that was too harsh and confronting for the Afghan audience. The sensational and confrontational tone of these programs often turned the audience off them, as it was seen to be contradictory to an Afghan way of doing
things. It seems that by using comedy, Khurshid has found the right balance and the right tone for these kinds of programs.

Some of the audience members felt that Khurshid was distinguishing itself as an entertainment specialist, rather than competing as a complete generalist against other channels. They made comments such as, “Khurshid is still in a phase of growth, and it wants to differentiate itself from other channels by making entertainment programs” (Male, 41-50, Jalalabad).

Yak

Yak was another channel considered to be competitive in the entertainment section by some panelists. Their current offering was well appreciated, with one panelist, for example noting, “Shabkhand and Shoma wa Million are the two most successful programs on Yak. They are becoming increasingly well known, and are educational too” (Male, 31-40, Jalalabad). Yak’s entertainment offering is seen as a driving force of their success.

Some segments of the audience see Yak as having a social conscience, and of reflecting on the requirements of the audience in order to produce entertaining, and yet useful shows: “Yak manages to, for example, make the situation of joblessness into a satirical joke, at the same time reminding the government of their accountability” (Male, 18-30, Jalalabad) and “They know the community’s desires, and are making programs based on that” (Male, 51+, Jalalabad).

3.3.5 The future of entertainment programs

The Afghan audience we spoke to are largely looking for greater educational opportunities in entertainment programming, noted with comments such as, “mostly they should consider the knowledge growth of our children” (Male, 41-50, Jalalabad), “The educational section should increase” (Male, 41-50, Mazar), “The entertaining programs should also include practical education for children” (Female, 18-30, Mazar) and “Educational sections should be considered in entertainment programs” (Female, 18-30, Kabul). Whilst the educational value of many of the current entertainment programs is appreciated, the panelists are insistent on their desire to see an increase in this regard.

There was also an interesting trend for panel members outside of Kabul to share their desire for entertainment programming to be broadcast from other parts of Afghanistan in order to increase their knowledge of different parts of the country and to allow a greater variety of people to participate in them, particularly for shows that allow contestants to win money. For example, respondents said, “Such programs should be produced in all different parts of Afghanistan, so that we can get to know each part of the country” (Female, 18-30,
Jalalabad), “They should produce programs in all of the provinces. This would give a chance to youth in other provinces to participate” (Female, 41-50, Jalalabad) and “If security allows, they should go to different provinces to produce the programs” (Male, 31-40, Mazar).

3.4 WOMEN’S PROGRAMMING

Women’s programming is a key genre in the Afghan market, particularly given the amount of time women spend with the television on throughout the day and the fewness of avenues for their education. The women we spoke to reported a number of motivations for watching this type of programming, with the main one being a desire to learn.

This learning ranged from informing themselves about women’s rights, “I want to know about our rights, and how to defend them” (Female, 41-50, Mazar), to “becoming aware of the situation of other women” (Female, 18-30, Jalalabad) in order to learn from their experiences, and finally, to “know the ways to solve women’s problems, and how to live in the community” (Female, 18-30, Kabul).

A range of women’s programming is currently aired on Afghan TV. The female panels were exposed to three of the most popular women’s programs showing on Afghan TV in 2014:

**Ariana dar Nima Rooz, on Ariana:** is a talk show that focuses on different aspects of a woman’s life such as health, cooking, decoration, etc.

**Banu, on Tolo:** is a 30-minute daily talk show hosted by Dr. Yassin, a psychologist, and Farzana Samini, a female presenter. Each day, the program features one topic around the daily life of Afghan women. Women can call-in to seek advice and pose questions to Yassin and Samini.

**Ashpaz Khana, on Khurshid:** is a cooking show. The chef chooses one type of food for each program and shows the audience how to cook it.

Over half of the women selected Banu as their favorite women’s program, with an even mix of Ashpaz Khana and Ariana dar nima rooz amongst the others.

3.4.1 Banu (Tolo)

*Banu was considered most popular primarily for its interactive format;* that is, being able to directly call-in to the studio with issues, which experts then address. This type of programming produces immediate benefits that the respondents appreciate. They shared that they enjoyed Banu as it, “considers women’s issues and provides solutions for them, increasing our experience in terms of life as a woman” (Female, 18-30, Kabul), “it provides great and understandable advice to families directly through a question-and-answer format” (Female, 41-50, Jalalabad).
Mazar), and “the doctor provides good advice that can help solve many women’s problems” (Female, 51+, Jalalabad).

Moreover, by **allowing direct engagement and interaction**, this format allows the women to feel as though they have a voice, which is rare for some of the women that it reaches. For example, women shared, “*Banu gives women the opportunity to call directly into the studio to ask for a solution to their problems. They are provided answers to their question immediately, offering them a venue of expression they sometimes don’t have at home*” (Female, 41-50, Jalalabad).

The presence of an “expert” on the show (i.e. the doctor) is also significant as it makes many of the women feel as though they have access to a professional, which is a very new and rare experience for many of these women, particularly those that are less educated and living in more rural areas. Cleverly, there is a female presenter that supports the male expert, which would alleviate the concerns and hesitations of the more rural/conservative female viewers and gives them the option of speaking through a woman if necessary.

A number of women also valued Banu for **introducing them to women’s rights**. They shared, “*Banu makes women aware of their rights*” (Female, 51+, Jalalabad), and “*they inform us of the rights of women*” (Female, 40-50, Mazar). Without means to otherwise engage with women’s rights, women’s television programming is a key opportunity to provide this type of education, an opportunity women enjoyed. Moreover, the fact that this was not the focus of the show but an ancillary benefit, made it easier to digest for some viewers who would normally feel timid about a show that is overtly pressing them to assert their rights as a woman.

### 3.4.2 Ashpaz Khana (Khurshid)

**Ashpaz Khana** is a cooking show run by a chef, who demonstrates how to cook one type of food in each program. Beyond just teaching cooking, Ashpaz Khana was recognized as providing interesting health and cooking related information to women, such as, “*it teaches me sophisticated decorating skills to be used in the kitchen, and also techniques for better hygiene*” (Female, 51+, Jalalabad) and “*it teaches sanitation and cleanliness in the kitchen, and also how to decorate*” (Female, 18-30, Mazar). Women appreciated these tips on how to better their daily existence.

Women also shared that **they enjoyed the show for teaching them how to cook new foods, in a cheap fashion**. In comparison, they found that the food cooked on Tolo was often too expensive. Ashpaz Khana was recognized for providing a reliable program in which a very experienced chef could teach them
in a clear and concise manner. Women shared, for example, “the chef always gives a very clear description of all of the ingredients, and everything he does as he cooks. So it means that nothing is missing if I try to use the same recipe myself” (Female, 31-40, Kabul).

3.4.3 ARIANA DAR NIMA ROOZ

Ariana dar Nima Rooz is a women’s program that is broken up into different sections that try to cover the entirety of a woman’s life. This includes segments such as shopping, make-up, health, fashion, decoration, women’s issues, and cooking. As a daily program (airing six days a week), the program doesn’t include all segments in every show, but rather mixes it up throughout the week. The format differs according to the segment. For example, for the health segment, doctors are invited in as guests, and people can call in and directly ask questions. For other sections, it may just be the presenter or the presenter and a guest.

Ariana dar Nima Rooz was preferred for their capacity to cover all aspects of a woman’s life. For example, respondents noted, “They cover almost all aspects of a woman’s life, meaning that women can solve their problems by getting advice for many things, including decoration, how to keep food, and how to be fashionable” (Female, 18-30, Kabul), and “I prefer it as it is more educational” (Female, 51+, Kabul). Women enjoyed that the program tried to encapsulate their entire existence as a woman, rather than focusing on a certain section of their life.

The varying subject matter keeps women attentive, ensuring they are never bored with the content. Women shared, for example, “Compared with other women’s programming, Ariana’s is more entertaining. It does not make you bored, because the topic is changing every day, and changes all throughout the show” (Female, 18-30, Mazar). Another noted, “Compared to Tolo, which sticks to one topic, this program has more segments. This brings difference to the program, and so I do not get bored” (Female, 30-40, Kabul). The range of options also has effect on who they can attract, with women citing a variety of different sections as their favorite.

3.4.4 OUTLET STRENGTH IN WOMEN’S PROGRAMMING

Whilst Tolo was, one again, consistently named the most innovative broadcaster of women’s programming, both RTA and Ariana also achieved a number of supporters.

TOLO

Tolo was recognized as being the most successful outlet in women’s programming, praised for a variety of strengths in this regard.
Tolo was considered as a provider of great advice for women, particularly because they have experts providing advice, which leads to greater confidence in the advice being given: “It is educational, and we can ask for help with our problems directly to their programs” (Female, 51+, Mazar), “They are providing great advice that solves most women’s problems” (Female, 41-50, Jalalabad), and “Having presenters as psychologists means they have the expertise to take care of questions, and provide good advice” (Female, 18-30, Kabul).

Tolo was also believed to have a greater ability to carry the voice of women to people of authority and influence, given its relative size and consequent impact: “Our voices can be heard better by the authorities through this channel” (Female, 18-30, Mazar), “It reaches women’s voices to people around the globe” (Female, 41-50, Jalalabad), and “Their shows manage to reach women’s problems to the governmental authorities” (Female, 51+, Kabul).

Finally, a dedication to improving the lives of women by providing examples of successful female leaders was appreciated, with respondents sharing, “Tolo wants to strengthen women in their life. They invite women who have a good education for the education of other women” (Female, 18-30, Mazar), “They are making women aware, and trying to engage them in social activities” (Female, 18-30, Jalalabad), and “Tolo knows women and their problems, and make programs according to their needs” (Female, 41-50, Kabul). This is a great achievement by Tolo, given the fact that previous studies by Altai identified this as a role that the media would do well to play for Afghans.

**Ariana**

Ariana was also selected by a number of women as providing the most innovative women's programming. Ariana were indicated to have a particular strength in covering all facets of a woman's life. For example, women shared, “In Tolo they only discuss women’s problems, but in Ariana they consider every aspect of a woman’s life” (Female, 18-30, Kabul), and “It gives information to women for all different parts of their life” (Female, 31-40). Rather than specifically concentrating on one type of women’s programming, Ariana was preferred for their capacity to holistically cover the entirety of issues and aspects of an Afghan’s woman’s life. This was largely referred to in comparison to Tolo’s Banu, which concentrates solely on addressing women’s problems. Ariana dar Nima Rooz, however, provides a comprehensive, expansive covering of a variety of subjects that may interest women in their life. This ranges from decoration techniques, to advising on product selection in supermarkets, to health tips. Women enjoyed the

---

capacity of Ariana to offer their audience, as women, a complete package of topics and segments, from which they could learn and gather advice from.

Another particular strength, noted by women in Jalalabad, was Ariana's educational programs dedicated to assisting women. For example, respondents noted, “It has educational programs for women that help make them self-sufficient” (Female, 51+, Jalalabad), “They care about women, and try to make them aware of their rights” (Female, 18-30, Jalalabad), and “They encourage women to take part in governmental activities beside men” (Female, 18-30, Jalalabad). These respondents shared a preference for Ariana because of its programs aimed at educating women to the aim of empowerment, increasing awareness of their rights and encouraging them to participate in daily life. Women from Jalalabad shared that they felt Ariana was invested in their wellbeing, and thus designed their programs in an effort to uplift women.

**RTA**

Older women in particular selected RTA as the strongest outlet in terms of women's programming. There was appreciation for RTA's women's programs both at the national level and at the regional/provincial level.

RTA was seen as promoting women's rights but within the framework of Islam. For this reason, it is seen as less threatening. This allows more conservative women in the sample to become open to considering such concepts, which is important, as they may be averse to this kind of discussion if it is not seen to be in line with Islam and local culture. It seems that RTA's link to the government is mainly responsible for giving this impression of being in line with local traditions.

Also, when RTA airs discussion on women's rights, it gives viewers the impression that the government is prioritizing these things: “RTA belongs to the government, so when we see these programs on RTA we know that the government is respecting women's rights” (Female, 51+, Mazar). This reveals an important role for RTA to be aware of.

### 3.4.5 The future of women's programming

Across the panels, women felt like women's programming was missing a few crucial elements that they would like to see improve in the future. Women's shows were highly appreciated for their capacity to reach women, but they were still lacking the educational value women were looking for.

The women interviewed from Kabul and Mazar asked for programming to increase their learning potential, but in two main ways: Women want to see more leadership and examples of successful women that give them hope and
precedence to strive towards and they want to learn skills (vocational training) that can offer them the chance to participate in the economy of the country. This was reflected in comments such as, “they should make women aware, and help them participate in work beside their brothers” (Female, 51+, Kabul), “vocational training should be broadcast for women via special programs” (Female, 31-40, Mazar) and “they should invite as guests expert women so that we can learn from them” (Female, 31-40, Kabul). The desire for role models has emerged over and over again as a request of the Afghan populace from the media, as it was also identified in 2010. It seems that Tolo has made some progress in this regard but it is something that the audience is still calling for more of.

The women that we interviewed from Jalalabad also requested further learning, but not in terms of vocational opportunities. Rather, they spoke of learning that would help their daily lives, such as “Public awareness to stop violations against women” (Female, 41-50, Jalalabad), and issues such as “guidance for women that can show how they should walk in the city with a Hijab” (Female, 18-30, Jalalabad). These are interesting requests from a traditionally more conservative area of the country and suggest a possible emergence of new ways of thinking about the role of women.

3.5 POLITICAL DEBATE

A whole new set of political talk shows make up the scene in 2014, when compared to 2010, and they remain a particularly popular genre, especially amongst men.

During content testing, male panel members were exposed to clips of:

**Tawdi Khabari, on Lemar**

**Tawda Bahsuna, on Shamshad**

**Fara Khaber, on Tolo News**

These programs are all formatted similarly; they invite guests, largely political, onto the show to discuss the hottest issues of the day.

Respondents in both Mazar and Kabul had a high preference for Fara Khaber, with respondents from Jalalabad preferring the Pashto-speaking programs, both Tawdi Khabari and Tawda Bahsuna.

3.5.1 FARA KHABER (TOLO NEWS)

Fara Khaber was seen to pinpoint the most pertinent issues and to have the ability to make an impact on them. This was because of three main reasons: having the courage to ask big, and potentially controversial, questions; linking
problems with solutions; and accessing key individuals to appear on the show who have the ability to make a difference.

Fara Khaber was seen as a show that pinpointed the most pertinent issues of the day without being afraid of potential repercussions. It is seen as having the courage to ask the right questions, even if they are controversial or sensitive. Respondents made comments such as: “they cover hot topics and so it is my favorite” (Male, 41-50, Kabul), “It makes a very serious effort to find the truth, with very careful questioning” (Male, 41-50 Kabul), and “They ask the big questions without fear of any kind” (Male, 18-30, Kabul). Tolo, as an outlet in general, also carried this reputation for our sample, a reputation that is most likely formed through the way it approaches its programming.

Fara Khaber was also seen as a show that goes beyond just talking about a problem to also findings solutions: “They go deeper into a question to find the real answers” (Male, 18-30, Mazar), and “They not only talk about political and security issues, but they want to find a way to solve these problems in the community” (Male, 18-30, Kabul). Such a characteristic has the ability to really set a show apart from the rest, particularly in a genre where there is not a lot of room for differentiation in format.

Further to the idea of solutions, Fara Khaber was seen to have access and the capacity to invite key individuals implicated in a discussion- individuals who are key for either shedding light on the issue at hand or for being able to impact the solution. This was noted in comments such as, “They invite as guests the key people who are responsible for the matter that is being discussed, and they ask questions of people both in and outside of the government” (Male, 18-30, Kabul) and “for all events they invite the responsible people to respond” (Male, 41-50, Mazar).

3.5.2 Tawdi Khabari (Lemar)

In Jalalabad, the two Pashto speaking programs were vying for popularity, with Lemar’s Tawdi Khabari receiving higher recognition in the FGDs.

Tawdi Khabari was well liked for similar things to Fara Khaber: inviting the right guests “They invite all of the responsible officials“ (Male, 18-30, Jalalabad); asking the right questions, “they continue pushing the issue up until the end” (Male, 31-40, Jalalabad), and having good intentions, “they have more guests and are trying to find a solution for an issue with better ideas“ (Male, 18-30, Jalalabad).

Tawdi Khabari was praised for offering to viewers the potential to gain a greater understanding of the full picture of political affairs in the country, by inviting the right participants, and by pushing them to respond to their questions.
3.5.3 Tawda Bahsuna (Shamshad)

Despite a slight preference for Tawdi Khabari in the FGD, panelists also noted that **most of the top debate programs are fairly similar in their quality, capabilities, and format**. Because of this, the choice to watch one program or the other relies largely on their interest in the topic being aired, and the guests that form a part of the show.

Tawda Bahsuna was respected for inviting the right guests, for addressing the hottest topics of the day, and for their dedication to getting real answers from their guests. Respondents shared, “**Tawda Bahsuna always pushes the question until they find the real answer, and they will ask questions from a few guests to ensure they get details from all angles**” (Male, 31-40, Jalalabad) and “**They are not afraid to criticize the guests directly in trying to find the solution, which makes everyone consider their responsibility**” (Male, 18-30, Jalalabad).

3.5.4 Outlet Strength in Political Debate Programming

As was previously noted, respondents indicated that the quality and format of debate programming is now so similar amongst leading channels that viewing choice is largely linked to their interest in the topic of discussion on the day. Despite this, however, respondents still shared that some channels were particularly strong in their offering, for a number of reasons.

**Tolo and Tolo News**

Tolo and Tolo News were considered especially strong for their political debate programming.

Details such as the **strength of the presenter and the look of the set and studio** have the ability to greatly impact a genre that can be quite dry (such as political programming), given that it talks of serious subjects and is mainly studio based. Tolo was noted as being quite strong in both when it comes to political programming, and in particular was noted for having presenters that are strong in both Dari and Pashto. Respondents made comments such as: “**They change the stage and look of the studio every 6 months, and they also have very serious presenters**” (Male, 51+, Jalalabad), and “**They have great and professional presenters for both Dari and Pashto languages**” (Male, 51+, Jalalabad).

Tolo was also noted for having **very serious and high quality journalists** in their political programs that are dedicated to the ethics of unbiased journalism and manage to get to the heart of an issue. Respondents shared: “**they know the journalism rules well**” (Male, 41-50, Mazar), “**They have sovereignty over their anchor and question without bias**” (Male, 18-30, Mazar), and “**They ask the right questions**
Their capacity to access the right people was also appreciated, a point that was also made in the discussion on the strengths of their show, Fara Khaber. Respondents shared that “they invite high level government officials and make sure that their guests are providing answers to the people” (Male, 18-30, Jalalabad).

**Yak**

Yak was seen to be an innovative provider of debate programming for their capacity to invite guests of a high level, and who appear to be at the crux of the issues they discuss. For example, respondents shared, “Yak always finds the reality in the issues they discuss, and they invite highly ranked government officials” (Male, 18-30, Jalalabad) and “Yak's presenters prepare good questions, they try to dig deeper than other shows” (Male, 31-40, Kabul).

**Ariana**

Ariana was commended for their capacity to bring clarity to often complex political issues, and for ensuring guests answer their questions. Respondents shared, “Ariana does not allow participants to talk themselves out of a discussion, they have to talk only on the issue at hand. They make sure they get the right information out of them” (Male, 31-40, Jalalabad), and “Ariana really works hard to find the details, rather than just asking basic questions” (Male, 18-30, Kabul). They were also seen as being entirely neutral, working independently from any parties or groups, and therefore bringing a level of objectivity to their debate programming not always seen from other channels.

3.5.5 **The future of political debate programming**

Men called for debate programming to be more inclusive, with some sharing, “At the moment, the discussion is limited to a specific segment of society” (Male, 41-50, Kabul). They asked for this to be improved, demanding things such as, “All the channels should have these type of programs to get ideas from everybody in the community” (Male, 41-50, Jalalabad), “Each class should have the possibility to contribute to these discussions” (Male, 51+, Kabul), and “They should collect the ideas of the people into the program” (Male, 18-30, Mazar). With men recognizing the importance of this type of programming, they simply wanted to see it expanded to include as much of society as possible, both as viewers, and with having their opinions considered.
4. **Pull Factor: Outlet vs. Content**

Having examined preferences as shared by the panelists, both in terms of their outlet, and the content, the following section will be juxtaposing these two drives to discuss which factor is more influential on choice. This section will begin by looking at outlet as a driver, and then content, before comparing which one appears to be most influential in choice.

A number of themes emerged, beyond specific opinions shared on the outlets, which appeared to guide or highly influence their judgments. These will be discussed below:

4.1 **The Pull of the Outlet**

4.1.1 **Trust with Age**

The clearest trend amongst outlet driven viewers appeared to be the idea of **having greater trust in an outlet that has been on the scene for a long period of time**. This was particularly identified amongst older viewers. For example, respondents made comments such as: “These channels are old, and everyone is familiar with their names. People have watched so much programming on them, and so they trust them” (Male, 18-30, Jalalabad). Tolo was often mentioned in this regard, with respondents sharing: “All people like this channel, and they trust it because it is the oldest channel” (Male, 51+, Jalalabad). Another mentioned, “I like Tolo because it has been here a long time, so I know I can trust it” (Female, 31-40, Jalalabad).

The linkage of age to trust was also indicated with reference to RTA. One respondent, for example, stated that they liked RTA because “we watch it because it is the oldest TV channel” (Male, 41-50, Kabul), and “We like it because it is the first channel broadcast in Afghanistan” (Female, 41-50, Jalalabad). Despite the opinions noted earlier of RTA struggling to modernize and remain relevant in today's market, a remarkable amount of the audience members we spoke to remain loyal to the channel, with the age of the channel noted as one contributor to why this might be so.

It was also seen to sometimes just **derive from a habit**; that is, you started watching a particular outlet and it became a habit. Again, Tolo was mentioned in this regard; Tolo was the first incomer after RTA, and it provided a modern, exciting alternative to everything the audience was used to. As they were happy with the service, they have stuck with it from then on. For example, respondents made comments such as: “After RTA, Tolo was the first to be established. We started watching it from when they first aired, and then we stayed with it. I like it because it
has always been there” (Male, 41-50, Mazar), and “At the beginning we watched Tolo, and then we just kept on watching it. It was the first channel after RTA, and had better programs, so we just kept watching” (Female, 31-40, Mazar).

This sample suggests that for these viewers, the length of time the channel has been around is linked to trust and that outlets that have been in operation for longer periods of time benefit from habits having been established with them. For some of these respondents, this trust was enough to dictate their program choices. Knowing, trusting and believing in the channel meant they would most often turn on the television to watch this channel, whatever they might be broadcasting.

4.1.2 News Programming and a Channel’s Legitimacy

For many of those we interviewed, trust in the channel appears to be reflected in the trust they have in their news programs. That is, a channel’s capacity to deliver high-quality, on-time and un-bias news could frame a consumer’s perception of the entire channel itself.

When asked about why their favorite channel was the strongest in their perception, a large number of people responded with information about the channel’s news programs. For example, responses included “It has fast and correct news”, (Male, 31-40, Kabul), “They provide truthful news from all over Afghanistan, and they always have the fastest breaking news” (Female, 18-30, Mazar), or “they are broadcasting the most reliable news of the region” (Male, 18-30, Jalalabad), and “they have great news, and broadcast information about daily tragedies” (Female, 51+, Kabul).

These responses were noted in all three provinces and by men and women alike, but with a higher tendency to be heard from men. As these examples indicate, the predominance of news in the audiences’ lives sees strong ties formed between how an individual rates a news program, and how they perceive the channel as a whole.

4.2 The Pull of the Content: A Move Away from Brand Fidelity

On the contrary however, there were those viewers who showed far less brand loyalty. There was a tendency for these viewers to be drawn to channels because of their program offering, and not solely because of the channel that it was broadcast on. This share of the audience is driven to watch television by the program content alone. For example, one respondent asked, “Why are you asking me about channels? We don’t care anymore, we care about the program” (Male, 18-30, Mazar).
This set of viewers reported comments such as, “The channel is not important for me, the guests which come on the program are important for me” (Male, 18-30, Kabul), or “It doesn’t matter which channel this program was on, I would watch it” (Male, 18-30, Mazar). Another reported, “I am more interested in the program than the channel” (Female, 31-40, Kabul), and “We care about the program, not the channel” (Male, 41-50, Jalalabad).

With the panelists mentioning this more concentrated amongst the younger generation, this could have an increasingly great effect on viewership numbers in the future, as the younger generation of viewers begins to take control of the remote and thus viewing behavior of the family. This is particularly important when noted in conjunction with the insights seen in Section G.1.2, which discusses the relevance of children’s preferences in family television viewing behaviors.

However, whilst a prevalent view, it was not held across all youth that were a part of the study. For example, one young male interviewee reported, “Tolo has become like family” (Male, 18-30, Kabul), and one young female, when discussing why she watched one program, “I like Tolo, so I watch it” (Female, 18-30, Mazar).

### 4.2.1 Key elements affecting program choice

Beyond the starker examples of content or outlet driving the audience, as seen above, a number of more subtle elements arose as key to affecting program choice. These will be catalogued below.

**Educational value**

The desire for more educational programming on television as identified in 2010, was strongly affirmed by the panels in this study, with their responses adding breadth to the understanding of what is intended by the idea of *learning* in relation to television.

Across the genders, locations and age groups, interviewees used the term “educational” as an explanation for many of their preferences. However, the connotation behind this term was not mainstreamed. Rather, the word “educational” was used to describe a number of factors. Most specifically, it was referring to:
• **Education in the traditional sense, learning something tangible:** This was in reference to activities, such as learning to cook, but largely, in relation to the learning potential for children. Respondents were looking for television to teach their children not only moral and Islamic lessons, as noted below, but skills and lessons that could help them progress in areas that might traditionally be taught at schools.

• **Learning opportunities for the family on how to deal with relationships and challenges faced in life:** Many of the programs were preferred for their capacity to teach family members how to deal with issues they might face in their own daily life, and particularly moral teachings. For example, respondents shared, *“Dramas are a good way for our kids to learn about the comparison between good and bad”* (Female, 41-50, Jalalabad).

• **Vocational learning, in particular for women (and requested by mainly women):** Women expressed the desire to learn tangible skills from TV programming, particularly to help them engage in economic activity: *“Vocational training should be broadcast for women via special programs”* (Female, 31-40, Mazar).

• **Islamic education:** As has been seen in previous studies, a call for greater Islamic education was heard across the panels. Panelists wanting to retain their cultural heritage and traditions and saw television as playing a role in providing this knowledge, also as a facet of prohibiting the acculturation of their children into modern, “un-Islamic” teachings they may receive from newer television programs. For example, panelists shared, *“There should be more programs teaching us about our Islamic culture and heritage”* (Female, 18-30, Mazar).

**THE STORYLINE**

As was covered earlier, TV dramas have a particularly powerful place in the Afghan media scene and can drive ratings. The findings of this study indicate that the storyline is the most important factor driving the popularity of a TV drama.

**A strong storyline has the ability to capture an audience** so that they become so caught up in it that they cannot stop watching it. For example, some of our panel noted, *“The storyline of the program is getting more interesting, and I want to know what will happen at the end of the story”* (Female, 31-40, Kabul), or *“I wanted to see what type of story it would have. When I first watched it, it was interesting, so I was absorbed in the story and continued watching it”* (Female, 31-40, Jalalabad). Others indicated, *“It is interesting, and I am in the middle of the story, so I don’t want to leave it”* (Male, 18-30, Kabul), and *“I keep watching because there are*
political issues that are not resolved. Nothing would make me stop watching this show, I will watch it until the story ends” (Male, 31-40, Mazar).

More importantly, a strong storyline makes viewers loyal to the show, rather than the outlet. Many indicated that if they enjoy watching a drama, they would watch it on whatever channel it was aired. For example, “Yes we would still watch this show on another channel, even though this channel has the best dubbing. If you cut the show from this channel, we would still watch it as we have no choice” (Male, 31-40, Kabul).

In the example of Wadi e Gorgha (see Focus Box 3), we can see a direct indication of the power of storyline in series. This example underscores the heavy importance the audience put on an engaging storyline.

Focus Box 3: The power of the storyline: The Wadi e Gorgha example

The responses collected told a particularly powerful story for the Wadi e Gorgha series. Wadi e Gorgha, a Turkish series, was first aired in Afghanistan on Tolo in 2013. The success of Wadi e Gorgha is phenomenal, with all but three male respondents and a high majority of women indicating they knew of the show, and a large majority as regular watchers of it.

In 2014, Tolo stopped airing the show when Khurshid won the rights to continuing broadcasting the story from where it had finished on Tolo. The ratings indicate that it has been a key contributor to Khurshid's jump in the audience ratings, rising a large 6.6 points from the rating round in November 2013, to the most current in November 2014.

A number of respondents indicated that they had begun watching the show on Tolo, and followed it to Khurshid when Tolo had stopped airing it. Amongst these respondents, it was mentioned that the dubbing was better on Tolo, and yet they continued to watch it because they liked the story. For example, a viewer's wife indicated that the dubbing on Wadi e Gorgha was better on Tolo. His response was “I don't care about dubbing, I just want to know what is happening” (Male, 31-40, Mazar). Another respondent reported “I don't like the channel, it has bad translation, but I have to watch it as it has Wadi e Gorgha on it” (Male, 41-50, Mazar).

“Afghanization”

The audience we interviewed also highly appreciated shows that reflect their Afghan culture, society, challenges and realities. Whilst the storyline was indicated to be of high importance in series, there was a particular call for “Afghan” storylines.

Men indicated that they like shows that are relevant to their situation, that reflect their traditional community and that show political and economic realities that they are familiar with. Respondents shared, for example, “It is a political series which shows what is happening right now in our country” (Male, 18-30, Mazar), and “They show events that would be credible in Afghanistan” (Male, 41-
50, Mazar). Others noted, “the story is compatible with our current condition” (Male, 51+ Jalalabad), and “it shows events that are relevant to our country” (Male, 18-30, Kabul).

**Women prefer to see programs that reflect family and household issues and inform their daily life.** For example, women noted, “I like this series, the story provides me with lessons for how to live my life” (Female, 18-30, Kabul), “It teaches us how to deal with inter-family relations, and how we should work as a family” (Female, 41-50, Mazar), and “I prefer this drama as it teaches me how to solve our family problems” (Female, 31-40, Mazar).
G. Audience Behaviour and Preferences: Consumption Habits

- The focus was narrowed in on consumption habits around outlets and programs specifically.
- Women report watching TV actively when they finish all their work. For their favorite programs, they often schedule work around the broadcast time, so that they can watch it without distraction (actively). For some women, TV is only consumed actively, as the TV is switched off when they are busy.
- Men generally watch TV actively at night, unless urgent work arises. Active consumption is also dependent on their control over the remote control.
- Most viewers only know the time of their regular programs; implying that if the scheduled a program changes, or is running late, they may lose audience.
- Amongst our panelists there is greater awareness of the schedule of Tolo, as their schedule is fixed and runs on time, increasing familiarity; and also because Tolo regularly advertises its schedule.
- Some viewers turn on the television without a specific program to watch in mind, and flick between channels to find what to watch. Flicking channels is also done during commercial breaks, as a way to see what else is on. Some flick between only a specific group of channels.
- Panel members commonly learn of a new program by seeing an advertisement of it on the same channel. This provides insight into the way that certain channels may have self-perpetuated their viewership by advertising new offerings on their own channel.
- Learning about new programs can occur in a number of ways: visiting guests often control the remote, and can thus introduce families to programs they may not have otherwise seen. Talking to family and friends on the phone or in social circles is another way to learn about new shows.
- News is watched on a variety of channels, as a way to verify facts. By advertising other programs during their news program, outlets could increase knowledge of their programming schedule amongst a portion of the audience who only watch their news program, potentially attracting people to their other shows.
The week-long journaling exercise completed with 8 families in different parts of the country was conducted to understand family consumption habits. As previous Altai studies have looked extensively at habits around media consumption, this time the focus was narrowed in on consumption habits around outlets and programs specifically. That is, why do audience members spend so much time on particular channel or program, and what might cause them to explore a different channel or program, and thereby change their consumption patterns. The underlying premise was to better understand why certain programs and outlets are more popular than others and what factors drive time spent in front of specific TV programs, including how the choice of a certain program is made in a household.

1. **General TV Consumption Trends**

1.1 **Reminder**

As general consumption trends have been explored extensively in previous Altai studies, this section seeks only to outline some of the main trends, as a reminder, and in order to set the context for the further discussions that follow on consumption habits.

- Television consumption in Afghanistan often occurs collectively, particularly during prime time when everyone returns home and dinner is consumed together, most often in front of the television.
- Control of the remote normally rests with the head of the household when the family is consuming together as a unit. When the head of the household is absent, it is often the children that will have control over the remote (and thus, what is watched). Women very rarely are given the capacity to make this choice. Amongst the children it usually falls with the eldest and/or the boys.
- Women may be home alone at certain points in the day, in which case they may have control over what they are viewing.
- In situations of collective consumption, the head of the household will often interpret what is viewed for the rest. Sometimes discussion may ensue.
- It is typically when information broadcast by the media is discussed and debated in social circles that it takes root in Afghan communities – behavior changes collectively not individually – and it is common for things viewed on the media to be discussed in social circles.
- The TV is often kept in the room of the home where guests are received. This means that in the more traditional areas, if the family is hosting
guests that are not family members, the women will not have access to the television.

1.2 A Typical Day

The household case studies confirmed the habits around consumption, as they had been previously understood, but also gave some insight into the types of programs that are filling up the viewing repertoire of an Afghan family on an average day and who gets to select them.

In the morning, the husband will generally control the remote control, with a propensity to be watching either news or the morning talk show, ‘Bamdad Khosh’ on Tolo. In households where the male doesn’t watch television in the morning, because of leaving too early, women and older children are also likely to turn on the television, with a large majority of these viewers also watching ‘Bamdad Khosh’.

Once the husband has left the house, women are largely in control of the remote, turning the television on and off throughout the day. Television is more likely to be watched by women while they are eating lunch and in the afternoon when they have finished their chores. The shows women have a preference for throughout the day tend to be the cooking show, ‘Ashpazi’, the series ‘Fariha’, and the women’s call-in talk show, ‘Banu’; all of which are broadcast on Tolo. ‘Banu’ was by far the most consistently watched and liked program by the women in the household case studies.

If there are children in the family, however, and they are also at home with the mother during the day, they are more likely to control the remote control and dictate what will be watched. Children watch a variety of programs throughout the day. These largely included music shows (such as Music Night, on Yak; or Music and You, on Tolo), drama series (for example Grimm, on Saba; Khusran Semar, on Khurshid; or Qalb e Sard on Tolo), movies (usually on Haft), and entertainment programs, and were watched over a wide variety of channels. Children tend to demonstrate less brand loyalty.

In the afternoon, younger children often watch 30 minutes to an hour of cartoons, usually starting at 5pm, when the housewife begins to prepare dinner, and before the husband comes home again and takes control of the remote. Children watched cartoons on a variety of channels, from Mitra, Sama, Mehraban, Aria, and Noorin. Whilst cartoons were occasionally watched at other times, sporadically throughout the day, 5pm was the most consistent hour and respondents noted that their children chose the show.
Throughout the evening, the male head of the household in our study generally again took control of the remote. Most often, our respondents noted that the husband returns from work and watches the 6pm news. The family then proceed to watch television as a family throughout the night, first of all eating dinner whilst watching television, and then either having tea or just watching the television. Following the 6pm news, a combination of series and entertainment shows are largely consumed. Often, news is again watched at 10pm on Tolo, primarily by the husband, before being turned off when the family go to sleep.

1.3 Passive v. Active Consumption

As has been discovered in earlier studies, TV consumption in Afghan households is sometimes active and sometimes passive; that is, sometimes the TV may be on in the background as the family is engaged in other activity (like cooking, studying, chatting, etc.) and so they consume it passively, whereas active consumption refers to the state of being fully engaged with the program one is watching. As can be imagined, the hours of passive consumption normally far outweigh the hours of active consumption. Understanding the types of programs and the types of outlets that may be passively consumed by our audience helps to give some further context to the ratings data. That is, perhaps there are some that are viewed actively and intensely for short periods of time and others that are viewed passively and with little engagement for very long periods of time. In such scenarios, time spent in front of the TV is not necessarily an indicator for preferences, nor the best indicator for impact.

However, the consumption studies didn’t identify major trends that exist around particular channels or shows that are watched passively. Rather, the responses in this study seemed to indicate that for men, whether a show is watched passively or actively is less to do with the program itself, and more to do with the amount of work the person has to do.

For women however, they largely told the story of watching television actively for two reasons: when their favourite shows were playing, and when all of their work for the day was finished.

1.3.1 Women’s Patterns of Behavior

Women shared that they would ensure they had time to watch shows that they particularly liked. For their favourite programs, they would schedule their work around the broadcast time, in order to have the time to watch it without distraction. For example, women shared comment such as, “For the shows that I like, I make sure I have the time to watch until the very end” (Female, 18-30, Kabul),
and “When I have free time then I will watch any TV, but for the programs that I like, I specifically try to make time to watch them at the time they are broadcast” (Female, 18-30, Kabul), and “I watch this show [Banu] and do nothing, because I like this show” (Female, 31-40, Jalalabad). These types of comments indicate the priority and importance women place on certain programs, designing their life around ensuring they can watch it, also demarking women as a particularly loyal subset of the audience.

Secondly, women reported that they would also watch television actively when they had finished all the work for the day. Once they have completed their tasks and chores, women are largely left without too much to do, and will therefore spend their time watching television. They shared, for example, “I try to finish my work, and then with a calm mind I can sit and watch TV with my full concentration” (Female, 31-40, Jalalabad), and “Usually when I am free I will actively watch TV” (Female, 41-50, Kabul), and “I will watch TV actively when my work is finished” (Female, 31-40, Mazar). At this time, television provides something to keep them entertained, and gives them something to do.

At other times, women displayed a few different viewing behaviours. For some, the television would be on, but it may be more passively consumed in the background as they did other things, and their children may or may not be watching. For example, one woman noted, “During the day when I am watching TV I am often taking care of the children, helping them with their lessons, or doing the housework at the same time” (Female, 41-50, Kabul). There was no particular shows or outlets that this would be done in front of. Rather, it was based on the timing in which these events would occur. Often, if women had the TV on whilst they were occupied, the children would be choosing the channels, and watching the programs they preferred.

For others however, the television was switched off during periods when they were busy doing other activities. For these women, television was only on when they were watching more actively. This ranged from purely active watching, when they were doing nothing else, to consuming it fairly actively, but at the same time as doing a task that requires little concentration, such as eating their lunch. For the women who watched TV only during periods when they could concentrate on it, they shared that the very point of that time was to watch television, for example, “Usually I don’t watch too much TV, but when I am watching, I am just watching TV” (Female, 18-30, Kabul), and “When I am busy with work then we stop watching TV and turn it off. When I am not busy, then I will continue just watch TV” (Female, 18-30, Kabul).


1.3.2 Men’s patterns of behaviour

For men, those we spoke to generally explained that at night when they come home from work, they watch television actively, unless urgent work arises. For these viewers, night was a time for relaxation, achieved through watching television. With work over for the day, men largely reported having little duties to do once back in the household. Their active consumption of television was rarely disturbed unless some urgent work arrived, or occasionally when they had to help their wife or their children. Men reported, for example, “Usually I watch TV and do nothing” (Male, 51-60, Kabul), and “When I come home, I do not have any work to do, so I just watch TV. Sometimes it happens that I need to help my wife, and so I do that at the same time as watching TV” (Male, 41-50, Jalalabad). Another noted, “I don’t have any specific work at home, so I just watch TV programs, and sometimes we discuss about family matters” (Male, 41-50, Jalalabad).

However whilst this was generally the case, a secondary reason for men being less active consumers arose, beyond being disturbed by tasks needing their attention. This was largely dependent on their control over the remote. If a man had complete control of the remote and chose shows based entirely on his preferences, which as discussed earlier was found most likely, then he would consume all of the shows actively. However, if the family had a different dynamic regarding control of the remote, or over choice of programs, and they watched some shows that he didn’t like, then the men usually reported watching more passively, without much engagement in the program. Whilst in these cases they usually reported still being in the room, they were not engaged with the story or content, but rather just partaking in the company of their family. For example, one man reported, “I don’t like watching this show, so I don’t really watch it, I just like that I am sitting with my family at this time. We watch it because my wife really likes this show” (Male, 41-50, Jalalabad). Whilst it was fairly rare for this to occur amongst our panellists, it did arise, and could play quite a significant role if power dynamics in the household began to change.

2. Consumption habits around programs: Learning about programs

In order to better understand how families or individuals end up watching a particular program, one focus of the consumption study was to examine how panel members learn about new programs.

2.1 Knowledge of programming schedule

Largely, interviewees were unaware of the full program offering at any specific time. It was quite rare for respondents to know what other outlets were playing
at the same time at which they were watching their favourite shows, or the programming schedule in general of any of the outlets.

A variety of respondents indicated that whilst audience members weren't aware of the full programming schedule, they did know the schedule of their favourite programs. For example, one woman shared “For those shows that I like and follow, I know their time and schedule” (Female, 31-40, Mazar), and a male, “I know only the time for Wadi e Gorgha, my favourite show, and for the rest I just flick channels to find something interesting to watch” (Male, 31-40, Kabul). For these viewers, habitual viewing has reinforced a schedule that they remember or memorise. The implications of this are that if the scheduled time of a program changes, or if a program is running late, there is the potential to lose audience. It is also difficult to introduce new shows to their viewing habits.

There also appeared to be greater awareness amongst those we spoke to of the schedule of Tolo shows. This is because Tolo has a schedule that is fixed and runs on time so viewers are more likely to become familiar with its schedule. For example, one respondent explained, “I only know the schedule for Tolo, because they have programs that are regulated in terms of time - the timing of their programs do not change” (Female, 18-30, Kabul). The second reasons is that Tolo advertises its schedule regularly and often within other programs. For example, one viewer also explained that he knew his daily choices from being made aware of the day’s programming in Tolo’s morning show. He shared, “I know which shows I want to watch from the morning, because during the morning show, outlets will indicate which programs they will show during the day. So, I either know what I will watch for the day from that, or from knowing the schedule of my favourite shows” (Male, 51-60, Kabul). This also demonstrates how content can pull viewers to particular outlets. That is, if they are hooked on particular shows, during those shows they may hear about other offerings on the same channel and choose to watch them, keeping their viewing limited to that particular outlet.

2.2 Flicking channels

Flicking channels formed a large part of the behaviours of viewers who were not driven to watch a program because of a loyalty to an outlet. They largely reported flicking between channels for two separate and specific reasons, discussed below.

Some viewers turned on the television without the knowledge of a specific program to watch in mind. In this case they would flick between channels to find what they were most interested in. For example, one interviewee noted, “I will watch TV based on the time that I have, and as it is not normally forecast what
time I will have, I will flick when I have the time to find out what’s on” (Male, 41-50, Kabul), another noted “If I don’t have a favourite show on at the time I have to watch television, then I just flick through to find interesting programs” (Female, 18-30, Kabul). For these viewers, programming is sought to match the time they have, and the mood they might be in at the time. The ultimate choice of program appears to rely little on the channel, and largely on the content, which they find to be most appealing at that specific moment. Without knowledge of the programming schedule, or even perhaps of the time they might have free to consume television, they are left to just skim through the channels and make a decision.

A second set of flicking behaviour was reported to be during commercial breaks of programs being watched, at which time many of the audience members we spoke to flick between channels to see what else is on. For example, respondents shared, “In between the commercial breaks I flick to other channels to find out what is playing” (Female, 31-40, Jalalabad). This is not always just a quick process, with one respondent noting, “This show has a lot of advertisements, and so in this time I watch other shows” (Female, 41-50, Jalalabad). This behaviour was often noted as the sole means for being aware of what might be programmed simultaneously to shows they regularly watch.

There was a range of behaviours beyond that. Some people responded that they flicked between only a specific group of channels, sharing, “Mainly, we flick between Ariana, Saba, Tolo, Shaq and Shamshad. We don’t flick between other channels because they don’t have a good signal in our house” (Female, 41-50, Jalalabad). Others, however, would flick through the entire set of channels to have the full range of options, particularly when they were flicking to find a program. For example, one respondent noted, “For some programs, we follow multiple shows that might be playing at the same time, and choose the most interesting one at the time” (Male, 18-30, Kabul). This range of examples demonstrates how despite being unaware of the programming schedule, many of the audience members are exposed to other channels’ offerings through a process of skimming through the channels throughout advertisement breaks.

2.3 Advertisements

One of the most commonly shared ways that our panel members learnt of a new program was being exposed to an advertisement of it whilst watching another show on the same channel. For example, audience members noted, “About two months ago there was a different series playing. During the commercial break, they showed an advertisement telling us of the next series that was coming” (Female, 31-40, Jalalabad). Another respondent mentioned the same, sharing, “We were
following the previous drama and learnt about it in an advertisement” (Male, 41-50, Mazar).

This provides some insight into the way that certain channels, particularly those early to the scene, may have self-perpetuated their viewership by consistently consolidating their audience share with new offerings advertised on their own channel. By announcing new offerings in the advertisement breaks of their current programming, TV outlets expose their current audience to upcoming options in the same genre, sparking interest amongst those most interested. As explained above, this keeps their viewing limited to that particular outlet.

A few of the younger interviewees also mentioned seeing advertisements on the Internet, stating, “I find out about new shows through advertisements on TV, Youtube and Facebook” (Male, 18-30, Kabul), and another, that “I get this information from the channel’s website” (Male, 18-30, Kabul). The Internet may be serving as a newly emerging way to attract audience, however certain advertisements using these avenues are still only relevant to attracting already interested viewers. Whilst advertisements and information on social media websites can appear for any number of users, advertisement on an outlet website, for example, are largely only attracting those interested enough in the channel to seek out this information, again potentially acting to self-perpetuate and hold attentive their current viewers.

2.4 FAMILY, FRIENDS, AND HOUSEHOLD VISITORS

An individual's immediate community was also found to be a source of information on new programs.

Visiting relatives and friends were indicated as a key source of information for learning about new programs. One interviewee told the story of his mother coming to visit: “My mother came to visit us from Mazar. She was a guest in our house and suggested that we should watch this drama” (Male, 41-50, Kabul). From then on, his family watched this drama regularly. Another shared a similar story, saying, “Sometimes our relatives come from Kabul and we discuss different programs, they often give us information about new shows we haven’t seen. And sometimes as a sign of respect you give the remote to visitors to choose what they would like to watch, and so we learn about new programs in this way” (Female, 41-50, Jalalabad).

The act of honouring the guest by allowing them to feel at home and therefore control the remote can introduce families to programs they may not have
otherwise ever seen. As one responded shared, “One of our family members were invited to our house and in the morning they were watching this program. I saw it then for the first time, and then I watched it myself when I came home” (Male, 51-60, Kabul). His family now watches this show every morning, indicative of the ease in which once exposed to new programs, audience members can change their habits.

Speaking with relatives via the telephone was noted for a similar affect. For example, one respondent in Mazar noted, “At the time Shabkhand started, there was only RTA, Ariana, and Tolo. My brother called me from Kabul and told me to search the TV for another channel starting to broadcast called Yak, that also has good programs. When we searched for it, we found Shabkhand, and now we watch it all the time” (Male, 41-50, Jalalabad). Another shared, “About 2.5 months ago, one of our relatives told me about this program and asked me to watch it, and so I started to watch it. I’ve been watching it ever since” (Female, 18-30, Kabul). The shared preferences and opinions of family members are well trusted, and are considered valuable sources of information, and thus worth investigating.

Friends and colleagues at work/school were also denoted as a key point of information on television programming, most often noted by male respondents. For example, one male shared that “My friends told me that Ghani would have a live conference” (Male, 41-50, Kabul), and when he got home, he turned on the television to watch this conference. A young male noted that “Most of the time my friends tell me about the timing of shows” (Male, 18-30, Kabul). Another young male, when speaking about how he first learnt about a program, said, “At first I heard from my school classmates, and then I also watched its ads” (Male, 18-30, Kabul).

2.5 News Programs: An opportunity to capture a new audience

As has been identified in previous studies, Afghans are avid and sophisticated news consumers. Watching and consuming news takes up a large proportion of their media consumption, and given the Afghan preoccupation with security and development, access to information is paramount to their daily lives. Consumption patterns therefore, are interesting to dissect around such an important genre.

Despite having favourite news programs, most of the panel members, and in particular the male members, watched a large number of different news programs. This was indicated for a number of reasons. As was revealed in the
2010 study, and confirmed amongst our panellists, there was a tendency for community members to require verification of the information they heard in the news. Some participants reflected this in comments such as, “I compare news from different channels until I know the truth” (Male, 18-30, Kabul), “Sometimes I compare news from one channel to another. If both broadcast the same thing then I am 100% sure it is true” (Male, 41-50, Jalalabad), and “The broadcasting time of each channel varies, so we watch the news programming of different channels to be aware of the real situation” (Female, 31-40, Kabul). Only two respondents indicated they only watched one news program, with both solely watching Tolo news, and seeing no reason to watch any other.

However, beyond just the trust and confirmation issue as described above, others reported additional reasons for watching more than just their favourite news program. In some cases, men reported watching different news programs simply because of the timing. For example, “I am out all day so might not have access to a TV or other news sources, so I try and watch this news program to be aware of what is going on in the news...there is no other news at this time” (Male, 51+, Kabul).

This demonstrates an opportunity for outlets to be able to increase their audience through their news programs. That is, there may be a segment of their audience that only watches their news programming. By advertising their other programs during their news program, they would increase the audience's knowledge of their programming schedule and potentially attract people to their other shows.

---

H. CROSS ANALYSIS

- Despite a general lack of well-defined brand positioning, many of the major channels’ perception of themselves was fairly well aligned with the audience’s perception of them. For example, RTA is well aware of the challenges noted by the audience, which include modernizing to remain competitive in the future.

- Professionalization is being propelled by the audience, with many panelists referencing indicators of professionalization as a determining their choices. This demand is perhaps pushed by a comparison with the offering of Tolo.

- Whilst outlets are providing genres that the audience prefer, they are missing some of the content structure the audience are pushing for. This includes, greater education, an increase in Afghan produced series, and a greater dedication to achieving objective, professional news programming.

- In order to address these demands, outlets should consider increasing the educative prospects in all genres of programming, dedicating resources to challenge the domination of Tolo series, and supporting the changes required in the industry to allow journalistic freedom to flourish.

- The cross analysis of the two major modules has revealed a gap between the demands of the audience, and what the outlets are currently providing. Principally, the Afghan media suffer from a persistent lack of understanding of their audience. It seems that part of the reason for this relates to a lack of understanding on what audience data can offer media outlets.

This section comprises a cross analysis of the results found from the media manager interviews and the audience modules, as determined by the qualitative research that informed those sections above, and supported by data from the most recent ratings exercise. The main objective is to look at how the positioning of the brand differs from the way the brand is perceived by the audience, as well as analyzing the extent to which the outlets are delivering upon the expectations of the audience.

1. BRAND POSITIONING v. BRAND PERCEPTION

Brand positioning amongst the outlets in general did not seem to follow a strong strategic direction, other than in a few exceptional cases. In comparison, the panelists’ perception of the outlets was fairly well established. Despite this
general lack of well-defined brand positioning, **many of the major channels were fairly well aligned with the audience’s perception.**

Despite aiming for a general family audience, **Tolo** has greater popularity amongst women than men. When disaggregating the data by gender, it is seen that amongst women, Tolo have 58.4% share, whilst amongst men it is 43.2%. This is potentially linked to the tendency for men to concentrate on news programs, often on multiple channels. Whereas women are more likely to watch serials, entertainment and women’s programming, with many of the most popular of these programs aired on Tolo. It is also likely to be influenced by the popularity of Tolo’s daytime content, a time when women constitute the majority of the audience. Overall however, Moby Group, striving to remain top of the field in their entertainment offering, was seen to be achieving their goals. The audience supported their vision of being a highly professional, quality provider of innovative, fresh and exciting content. They were consistently noted for pushing the boundaries, for introducing new and exciting content, and for being willing and able to pay the costs required to deliver stimulating and professional programming.

**RTA** were very well aware of the challenges they face in modernizing and in improving their offering in order to compete in an increasingly competitive environment. Whilst continually supported by the audience, somewhat linked to a patriotic pride in their national channel, the audience appeared to appreciate RTA largely in principle, but without high rates of viewership, capturing 2.9% audience share. RTA are doing particularly well at providing a service that the audience are dependent on – offering an important channel of information from the government, to the people. However, increasing independence and restructuring could further increase their potential to retain the support of the audience into a new generation of viewers who may be less patriotically compelled.

**Yak’s** positioning was fairly imprecise, but indicated they were aiming to be a national, broadly enjoyed provider of entertainment. Their difficulties in maintaining the strong position they gained when they first entered the market are echoed by the audience’s impression of Yak as struggling to compete. Yak was enjoyed for their capacity to provide fun and entertaining shows, and had particular brand strength amongst the younger, male audience members. Concentrating on these strengths could offer Yak a potential to regain their lost ground. By specializing in entertaining, youth-oriented programming, they could consolidate and possibly re-expand their audience share.
Khurshid appears well adjusted in terms of a clear understanding of their positioning that lies in line with the audience’s perception of them as a young, innovative and exciting new proposition. However, they were noted by some of the audience members to be lacking in certain quality, such as their dubbing, in relation to Tolo, and it would be worthwhile for them to address such challenges in order to remain competitive. Their strategy dedicated to innovation could see them further succeed in coming years, with a concentration on critical, or satirical entertainment programs perhaps an emerging niche.

Shamshad are well in tune with their audience perception, positioning themselves as providers of serious informative programming to a Pashto audience. Their audience supported this, appreciating Shamshad for its capacity to provide reliable, objective news and programming aligned with their culture and traditions. They are successfully attracting an audience concerned with their local region, and who are interested in seeing their social and cultural norms reproduced on the programming they consume.

2. Assessing the gap between what the media outlets provide, and what the audience expects

The perception noted by many of the media managers, that the audience was expecting higher quality, and a greater professionalization is supported by the audience response. The audience members we spoke to referenced many indicators of professionalization as a determining their choices.

As was indicated earlier however, the media so far appear to be unaware that the high level of quality and professionalization offered by the Moby Group channels is propelling this demand. The audience explains that they prefer Tolo because its quality, entertainment, professionalism and innovation provided is incomparable. This sets in place a level of expectation well above that which most of the other channels are capable of fulfilling and thus, drives a push for excellence in order to compete.

2.1 Content: The achieved and the missing

In general, the genres that outlets are concentrating on reflect those that the audience prefers. Series and news were by far the most appreciated programming, with entertainment programs, women's issues programs and political debate programs also playing an important role in their preferences.

However, a gap exists when looking at the content and make-up of these programs. The audience is demanding higher levels of educative prospects, an
increase in Afghan produced series, and for a greater dedication to achieving objective, professional news programming.

2.1.1 **Education**

The primary call amongst all panelists was to **increase educative prospects in all genres of programming**. This was nearly entirely unheeded by media managers, who made no mention of education amongst the interviews. Outlets could address this by integrating education amongst their strategy for new programs, aiming to capture a large part of the audience interested in these possibilities. For example, entertainment programs based on facts and knowledge were highly appreciated, and could be expanded. Women’s programming could be designed to meet the demand for greater educative prospects for women at home. Storylines in series could integrate moral teachings about modern living in an Islamic society, and about everyday relationships and families. Specific programs designed for education of young Afghans could also be created to satiate this demand for education.

2.1.2 **Series**

The panelists appeared particularly pleased with the current offering of series. However, the most popular series are highly concentrated on Tolo, with the exception of Wadi e Gorgha. **In order to capture some of the evening viewership, other channels require a dedicated attempt to challenge the domination of Tolo**, by offering entertaining, interesting series, at a high quality. Men in particular were looking for storylines reflective of their life and society. Offering a political drama based in a similar society would be an effective way to try and capture some of this viewership. Outlets do appear particularly aware of the demand for an increase in Afghan produced series, to which a response is slowly being instituted, led by Tolo. Financial challenges, rather than a lack of desire, are impacting the capacity for other outlets to follow.

2.1.3 **News**

The panelists were strongly interested in receiving objective, high-quality and professional news programming. They **pushed for greater respect and support for journalists, as a precedence for allowing this objectivity to occur**. This process would involve freedom of movement and speech, access to key events and issues, an acceptance of ethical journalistic standards, and standards of quality ensuring the information broadcast are meeting these standards.

Whilst Afghanistan is currently provided with a plurality of news programs, which is supported by an increase in investigative journalism, certain practices and
restraints impinge on a free and objective media truly taking hold. Citizens can freely access the news, without restriction. However, the practice of self-censorship, so well acknowledged amongst media managers, is one such practice. Whilst self-censorship in the news programming is largely linked to security issues for journalists, it poses a significant restraint on the capacity for journalists to work in a fair and objective manner. The capacity for the media to cover a broad spectrum of interests, a value underpinning a free and fair media, is questionable in the current environment, not always dictated by the outlets themselves, but the difficult security environment in which they function.

2.2 CONCLUDING REMARKS: A RESIDUAL LACK OF UNDERSTANDING

The cross analysis of the two major modules has revealed a gap between the demands of the audience, and what the outlets are currently providing. Principally, the Afghan media suffer from a persistent lack of understanding of their audience. Without conducting any form of audience research, they remain unaware of the nuanced expectations and furthermore, the consumption behaviors that frame this viewing.

It seems that part of the reason for this relates to a lack of understanding on what audience data can offer media outlets. Without any attempt to turn towards their audience, media managers are losing out on the opportunity to swiftly and inexpensively gain pointed advice on their achievements, their challenges and their prospects.

The cross analysis demonstrates that whilst there is some general awareness amongst the media managers of the broad pressures and expectations they face from the audience, there exists an overall lack of strategy and structure to address these challenges.
I. AREAS OF OPPORTUNITY: STRENGTHENING THE MEDIA’S SUSTAINABILITY

As has been seen throughout this report, the Afghan media is in a moment of transition, facing challenges both economic and structural. With the decline of international support, and a subsequent shift towards greater reliance on commercial advertising; along with the pressures produced by an industry naturally reaching a stage of maturity, outlets are forced to reconsider their current standing in order to best form a strategic path for a sustainable future.

As predicted in 2010, the incredible growth witnessed in the earlier years of the media industry in Afghanistan is slowing, largely unsustainable both from a financial and technical perspective. Whilst the opening up of the digital network may relieve some technological pressures such as the saturated bandwidth, sustaining this growth is still unlikely, given the increasingly sophisticated audience who has expectations of high quality and engaging content.

The current media landscape is inflated, full of a large variety of players. Many of these outlets are currently functioning without return on their financial investment, a situation unlikely to be sustainable for the majority of independent outlets. Newcomers face a highly competitive, challenging environment in which they must offer not only a high quality array of content, but also some form of expertise, which is seen in the niche offering of some of the newer channels.

The days where media outlets could emerge without serious consideration of the audience, sustained by the artificial economy of international support, are dwindling. Instead, media outlets are being forced to compete for relatively smaller media advertising revenue budgets. Currently, they are doing so without the tools or expertise on which to base this competition. Without an understanding of their market share, of their audience, or of their positioning, outlets are floundering on how to increase their hold on the market, and attract the advertising pool away from what could be considered the safer, and more stable bet of the bigger outlets.

The media industry, in particular the larger, more commercial outlets, are responding to these challenges with increasing professionalization; an attempt

---

to diversify and improve their offering; and in some cases, by specializing to cater to a niche market.

Finally, **Youth appear to be a growing influence on choice within the family**, and will, as they age, soon become the next generation of primary viewers. Having grown up with increasingly modern technology, and differing societal structures to their parents, the youth are representative of a potential gradual shift towards content driven, time specific viewing, whereby choices are made more spontaneously according to available time, rather than as dedicated and loyal channel specific viewers.

Given these challenges, and the tough competition they engender, the Afghan media are now situated at a moment of key importance, whereby a concerted effort to focus on improving their capacity to compete is required. The use of relevant audience data, such as that canvassed in this report, can help guide the media in a number of ways. What will follow are key areas of opportunity as identified throughout this study that media managers could explore in order to best frame their future. Taken from the qualitative research undertaken with both media managers and the audience, these opportunities are expressed as potential openings for further exploration.

As has been discussed in this report, an **understanding of the audience can help outlets devise a strategy that most effectively reflects the needs, desires and expectations of their audience**. This helps equip outlets with information to not only capture greater audience, but also advertising revenue. Instead of allowing advertisers to rely on their perception of the strongest outlets, as is currently done, the media should be able to learn to harness their strengths to provide a strong case for advertisers to diversify their media spending.

**1. The importance of professionalism in one’s reputation**

The report has demonstrated that professionalism is one of the factors that sets the first tier outlet apart from the rest. It emerges as something that has the potential to fundamentally shift an outlets reputation and thus, following. Professionalism is indicated by a number of factors, many of them driven by technical or aesthetic indicators, according to our audience:

- Having professional **sets and studios**, that are often updated and improved or changed and adapted to particular programs bears greatly on the outlets air of professionalism (see Tolo);
• Having **presenters that are professional** not only increases the appeal of a particular program and can drive trust in that program, but also affects the reputation of the outlet in general;

• **Quality and professionalism are intertwined:** quality is perceived by strong signal and consequently, good picture, and quality dubbing of international shows and dramas. Something that looks expensive, or looks as though a lot of money has gone into it, also gives the air of quality for the Afghan audience (see Tolo).

2. **A MORE CONTENT DRIVEN AUDIENCE AND THE IMPORTANCE OF ENGAGING CONTENT**

Primarily, outlets require a set of content that engages their audience, encouraging them not only to keep watching the entire episode, but also to return each episode to continue watching. Providing engaging content to the audience perhaps sounds fairly self-explanatory but **what outlets are currently failing to understand is what makes a program engaging for their audience, and more so than that, what compels them to keep watching.**

Amongst the audience members we spoke to, there appeared to be a shifting trend towards content-driven viewership, in which brand loyalty towards a channel as the defining element in choice is on the decline. This, alongside the high importance our panelists placed on the storyline of series in capturing their viewership, indicates a prospect for media outlets to capitalize on their content offering. In some cases, it was found that an engaging storyline was more important than quality. That is, the audience would deal with bad dubbing or a bad signal if the storyline was engaging enough.

The Wadi e Gorgha example has also shown that investing in a key program has the ability to greatly improve your audience share. By investing in a program that they knew was popular, because it had already been aired by Tolo, Khurshid managed to capture an audience that was already loyal to the show and thereby, increase its market share.

3. **CAPTURING NEW VIEWERS: INCREASE THE AUDIENCE’S KNOWLEDGE OF YOUR PROGRAMS AND OFFERING**

However good your programming may be though, outlets must firstly manage to engage some portion of the audience into this program for them to even be aware of the offering. As the consumption pattern studies have shown, once a small group of viewers are aware of, and enjoy the program, there is a potential for this to have a flow-on effect whereby they share this new program with their
friends and relatives. It is therefore the initial engagement that outlets should concentrate on achieving. A number of key opportunities for this engagement could be considered.

3.1 **Use your news programming**

Information gathered in the audience research indicated the importance of an outlet's news program to how a channel is perceived in general. It also reconfirmed the propensity for viewers to watch news programming over many different channels. These insights offer up three distinct points for outlets to take note of:

- News programming should be considered as a key asset amongst a channel's offering; something that has the potential to pull in a greater audience.
- There is an opportunity for outlets to use their news timeslots as an opportunity to advertise their other programs because it is during this time that they generally have the greatest number of viewers and non-regular viewers;
- Outlets could also consider the timing of their news program, strategically airing it at an hour that will capture a solid audience following.

**Channels with a regional concentration have a chance to cater to their niche.** Instead of aiming to compete with national news programs on large commercial channels, these channels could offer complementary news services, refining their offering to cater to the local audience. In depth, on-the-ground accounts of the events most relevant to their audience could be an attractive way to specialize their news offering and increase audience share.

3.2 **Provide a consistent schedule that runs on time**

The study has demonstrated that a consistent programming schedule (ie. Programs that always start on time) is rare in Afghanistan but also that such consistency has the potential to increase your reputation for being professional and your potential to hold on to your audience:

- Many respondents cited that Tolo was their favorite channel because it was always on time.
- It was also seen that if the audience turned on the TV to watch a particular show and it was running late, they would often surf other channels while waiting for their show to begin, which sometimes ended up in the channel losing its audience.
• Having a programming schedule that always runs on time and that is not changed frequently, also leads to the audience knowing an outlet’s programming schedule, allowing them to base their consumption habits around a programming timetable. This, of course, leads to a regular audience.

3.3 Promote your schedule

In an environment where very little of the audience are aware of program scheduling, outlets should take every opportunity to consistently remind the audience of what is showing, and at what time. It may serve outlets to think of new ways in which they can increase this knowledge—whether it be on social media, within newspapers, on sheets of paper handed out at grocery stores, or through advertising on radio.
J. Looking Forward

Many of the trends emerging in 2014 are likely to continue into the future. The growing awareness amongst media managers of the need to offer professional, exciting and innovative content will be obligated to eventuate into action. Those without the financial means or support to do so are likely to struggle, and eventually disappear.

Professionalization and attempts by outlets to improve their market standing will need to accelerate. The move towards specialization noted by so many managers, and yet apparently resisted by a lot of the previously existing channels may need to increase, and the emergence of further niche channels likely to occur. This may be particularly likely with the opening up of new bandwidth on the digital network.

Moby Media Group’s hold over the market remains steady and is likely to do so in the foreseeable future, given their strategic and concerted effort to consistently improve their quality and content. With the competition introduced by younger players such as Yak failing to take hold, Tolo has been given the opportunity to solidify their unrivalled position in the market. However, the entry of young, exciting newcomers such as Khurshid, who appear dedicated to challenging this position, offers a promising alternative for the current market dynamics. The entry of further competition would require newcomers to be highly dedicated, proficient and with substantial financial means to support an initial push into the market.

Meanwhile, for radio, the market appears to be further diminishing, particularly in urban areas. Radio’s key areas of audience share will in all likelihood remain predominantly amongst the rural areas of Afghanistan. Whilst outside of the scope of this report, electricity and television signal issues remain highly problematic in rural Afghanistan, impeding their access to television and thus boosting their reliance on radio as their sole media source.

The rise of office-based work will likely further weaken radio’s hold over the working male’s media consumption throughout the day, as they look to the Internet for their news and information. The predicted increase in the urban-rural divide noted in 2010 still appears highly likely, with no sizeable change in the current situation predictable over the coming years. However, the changing focus of radio stations to provide a more modern, entertaining offering, such as that seen with the transformation of Jawanan Radio into a youth-targeted content provider, could offer an opportunity for a small sector of the radio to
break into a more commercially viable, populist programming model that is listened to by choice rather than necessity.

The economic difficulties and security concerns that continue to plague Afghanistan raise concerns over potential progress in the advertising sector, which could have the largest influence on the capacity of truly independent media to survive in the long-term without financial support.

**A continuing responsibility of the international community**

Beyond the call for media outlets to forge for themselves a greater opportunity in the future, a challenge remains for the international community to ensure the great success story of the Afghan media industry is not whittled away by a reckless retraction of their support. Having helped lay the foundations for a free and open Afghan media, donors must now move towards engendering a sustainable future, which is possible, provided we plan accordingly.

Whilst diminished support is both expected and necessary, to do so without recognition of the challenges that remain would be to undermine all of the dedication and funding they offered to this industry in the first place. The risk of losing the smaller, independent media who function without the support of private backers, is a very real one, and one that is harmful to all of the work the media’s supporters have sustained so far. Unfortunately, loss of these channels is already happening, without a clear option on how to prevent this. However, what is clear, is that without the education, funds and support to evolve and confront the current challenges, it is likely we will witness the continuing loss of some of those channels most dedicated to providing independent content.

A decline in funds has helped to stimulate the industry to recognize their commercial responsibility to professionalize, modernize and improve in order to remain competitive. However, the support required to enable this transition should not be underestimated. This is not to say that all media outlets will survive this evolution, or that they should. However, in order to ensure a vibrant, healthy and socially responsible media exists in the future, the media and their support base should work together to reflect on the most effective and efficient way to move forward.