

AFGHAN MEDIA – THREE YEARS AFTER

Executive Summary

Key Findings

- **Most of the Afghans surveyed are intensive media users:** high frequency and length, high number of media known and used.
- **Radio has a predominant role in the country,** with very high ownership and usage rates.
- **Media usage is sophisticated:** information sources are chosen according to content, which is then cross checked with other sources.
- **Cultural barriers to media usage are rare.** Women and children can usually listen to the radio or watch television.
- **Media are trusted more than other sources of information.** Traditional sources are still used, playing complementary roles and often relaying information obtained from the media.
- **Media have a very positive image:** it is seen as a source of education and progress throughout the country.
- **Sensitive topics can – and are expected to be – discussed in the media,** but in the proper way and by the appropriate individuals.
- **Media are expected to be a tool for progress in society.** They are doing so, in the first place, by providing people with a forum to discuss their problems.
- **Public information campaigns are most effective when they combine various media and direct interaction with the community.**
- **Media are a primary source of education for women,** who have specific and high expectations.

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1. Background

Since early 2002, a large number of initiatives have worked to restore and develop media in post-conflict Afghanistan. At this point, it is important to understand to what extent and how media are being used by different *strata* of the Afghan society, from urban centers to remote villages.

Altai Consulting was mandated by USAID to conduct a study of the Afghan media and other sources of information, and to evaluate the direct impact of the local radio station network set up in Afghanistan by Internews, a non-profit media development organization.

1.1 Research questions

What is the outcome of three years of media development?

- What types of media do Afghan people have access to, and which ones do they use?
- Which stations and programs are appreciated?
- Is content understood and trusted?
- How are media perceived and integrated in community life?

What are the other sources of information in the Afghan society?

- What are the most important and influential sources?
- What kind of information is disseminated?
- How do traditional sources and the media interact?
- Which sources are most trusted?
- How do media influence opinions and behavior?

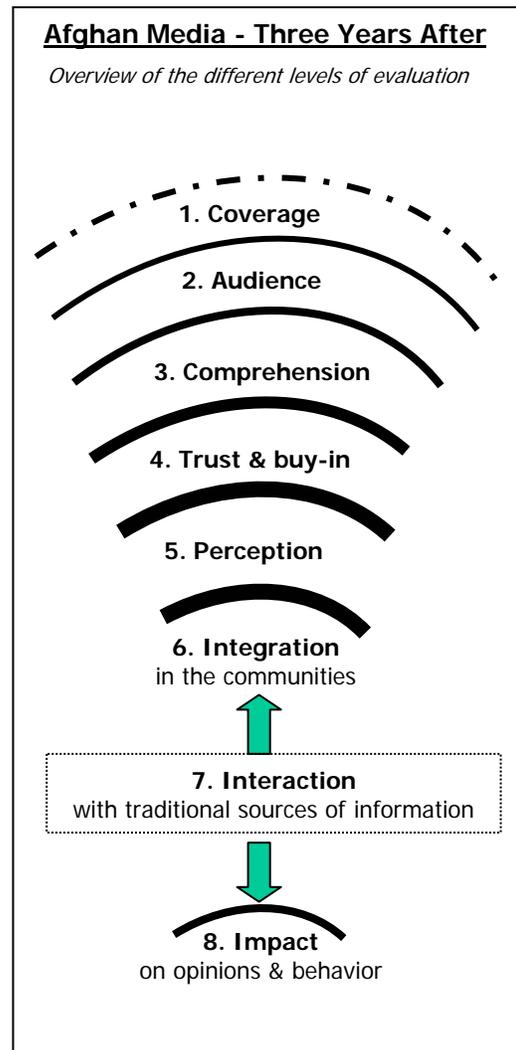
1.2 Tools and limitations

The field work was conducted from September 2004 to February 2005 in 15 Afghan provinces outside Kabul, based upon the impact areas of Internews-supported radio stations. In each province three different types of locations were surveyed: provincial centers, nearby villages and remote villages.

Research tools combined direct observations, unstructured interviews, semi-structured debates and focus groups, as well as 1,507 structured interviews and radio content testing.

Demographic challenges limit the extrapolation of the survey results as a definitive national

sampling¹, however the results provide a substantive picture of media usage in various regions of Afghanistan.



¹ Urban dwellers, young and literates are slightly over-represented in the sample. A complete description of the methodology used and its consequent limitations can be found in the complete report under *1-2. Media and Other Sources of Information in Afghan Society*.

2. Coverage

Radio is the leading medium with a variety of stations available:

- Foreign stations with Afghan production and nationwide coverage (the BBC, Azadi/Radio Free Europe, Voice of America).
- Radio Afghanistan state network: AM national broadcast, partial FM relay.
- Commercial radio stations available on FM in Kabul: Killid and Arman, the latter also being available in Herat, Mazar-e-Sharif and Kandahar.
- Local independent radio stations on FM (Internews, IMPACS, Sayara and a few private initiatives).
- Foreign stations transmitting from neighboring countries on AM (Radio Iran, Mashad, Radio Free Europe Iran, Radio Pakistan, Radio Tajikistan).

Broadcast and cable television are limited to the large provincial centers, but are quickly expanding.

- State: Television Afghanistan (Kabul based + provincial stations and relays)
- Private stations: Afghan TV, Aina TV, Tolo TV, Ghorian TV (Herat)
- Foreign broadcast television (border areas)

Satellite television: signals available everywhere.

Cable television is available in half of the provincial centers visited, and anecdotally in some rural locations

Press is available in most provincial centers, but scarce in rural areas.

- The privately owned Nye Network (Killid) distributes newspapers and magazines on a weekly basis to provincial centers, and to the district level when not too remote.
- Some local publications are available, and ad-hoc distribution by commuters and transporters provide additional access.

Public Internet access (Internet cafés) is available in the **five main urban centers visited** (Kabul, Herat, Kandahar, Jalalabad, Mazar).

Additional access points are being developed in smaller cities such as Bamyan and Khost.

Alternative information channels (mobile cinema and theater) have been experimented with during the last three years for educational and public information purposes. They were not observed during this research.

3. Audience

Equipment

Penetration figures for media devices confirm the **dominance of radio** and the growing rate of television ownership, which closely follows the pattern of public power development.

- Radio ownership rates are fairly even across the country

| <i>Equipment</i> | |
|--------------------------|-----|
| Radio | 83% |
| Television | 37% |
| Internet in the vicinity | 6% |

- Television

ownership reaches 40% in urban centers (Herat, Mazar, and Kandahar cities) but is much lower in remote provinces.

- The poor are still lagging behind in terms of equipment, including radio sets (58% of the poorest interviewees have radios, compared to 95% of the well-off).

Consumption

| <i>Media Consumption</i> | | |
|------------------------------|-----|-------|
| | Men | Women |
| Listen to radio | 89% | 77% |
| Watch television | 38% | 34% |
| Read newspapers ² | 31% | 19% |
| Connect to Internet | 3% | 2% |

- Audience rates follow device ownership patterns.

- Female usage rates are similar to male, with the exception of print media, due to lower levels of literacy. Many women have someone who can read to them from time to time.

- Media deprived: poor and illiterate women living in remote areas constitute the **most isolated segment** of the population with a 31% radio listenership rate and no access to television.

- **No major cultural barriers** to media consumption were observed, with the exception of the most conservative areas where television was sometimes criticized as being “non-Muslim”. However, in most places, it was observed that as

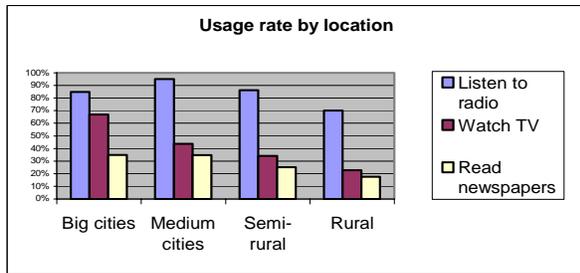
² “or have someone reading for me”. It should be noted that the sample gives larger weight to urban, literate people. This tends to explain the surprisingly high scores of newspaper and television usage. As for the press, a number of semi-literate interviewees tend to say they read the press even when they rarely have access to a newspaper. This is often an issue of pride.

soon as television becomes available, even the most reluctant end up watching it.

Usage habits and behavior

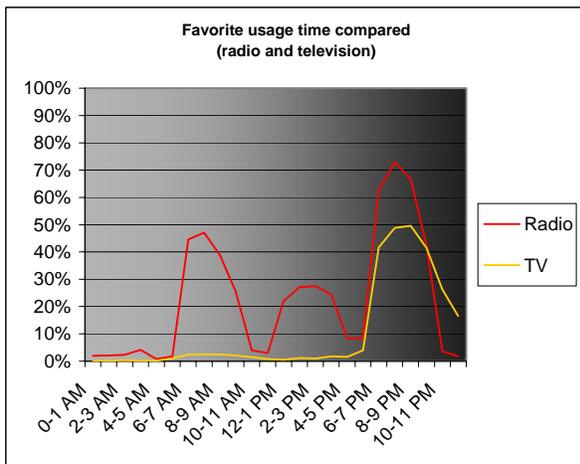
Media usage is **frequent, mostly at home and with relatives.**

- 63% of radio listeners and 73% of television viewers tune in everyday. Newspapers are usually read on a weekly basis.



- Of women readers, 25% read newspapers in schools. 27% of men read them in shops.

- Radio and television are used **intensively**, but



not always attentively.

- Users regularly switch between several stations.
- Favorite listening times show three peaks for radio: early morning, early afternoon and evening.
- Television is watched in the evening, when electricity is available and families gather at home. This is in phase with programming of most television channels.
- Women and the less educated often listen to radio while doing other activities.

There is a **relative freedom** among family members, including women, to turn on the radio and television.

- 59% of women and 85% of men state that they turn the radio on by themselves.

For television, only 37% of women turn it on by themselves, but 22% of them have their children do it for them, and 15% their spouse.

Preferences

Four networks dominate the radio landscape outside Kabul: the BBC, Azadi, Radio Afghanistan and the network of local independent stations.

- A tight group of three stations – the BBC (76%), Azadi (75%) and Radio Afghanistan (74%) - is followed by VOA (33%) in terms of declared listenership among the 1,507 surveyed people.

- The local independent stations are the most listened to by interviewees (79%) within their more limited coverage areas.

- In the two locations where Arman FM was already broadcasting at the time of research, it was among the top stations listened to (by 63% of interviewees in Mazar-e-Sharif and 56% in Herat).

- Language is a factor in radio station preference. Among Pashto speakers Azadi has a clear edge on Radio Afghanistan and the BBC, due to more Pashto programming according to interviewees.

Television Afghanistan (national and local) is the leading television channel outside Kabul.

- In the sample, 64% of responses go to Television Afghanistan.

- The audiences of other channels are limited by their broadcast areas.

- Satellite usage was still too marginal to build an audience breakdown of the channels.

Press readership is highly dispersed (60 publications cited by 181 respondents), partly due to distribution patterns.

- Two leading magazines, *Killid* and *Mursal* (Killid group) are the notable exceptions.

Internet usage is limited and mainly consists of e-mail, chat and a few information sites.

- Women suffer from a severe lack of internet access, mainly because of the absence of spaces dedicated to women.

Preferred Programs

National news, local news and music are the most preferred programs across gender and age groups

- Music and entertainment are clearly preferred by the youngest audience.

- All segments of the population indicated a desire for programs that **discuss societal changes** (e.g. *You are the Judge*³, listeners' letters).

- Programs covering news and daily life in other regions are popular and more are requested.

- **Educational programs** are greatly appreciated, and interviewees feel that more are needed.

- *New Home, New Life*⁴ was found to be a very popular program in the surveyed provinces. Its format covers many aspects of daily life, including social and health issues. The program was found to stir debate and changes in households.

- **Advertising** is raising interest, as it is bringing information about available products and prices. Since most Afghan consumers are not familiar with many brands, the current main advertisers have quickly established name recognition nationally (Roshan, Alokozai, AWCC).

- Radio listeners are **sophisticated in their listening behavior** and, depending on content, normally choose and verify information between several stations.

- **Locally-based news and other programs** (culture, music, announcements) are listened to on local stations. National news is listened to on Radio Afghanistan, and international news on the BBC, and to a lesser extent, on Azadi.

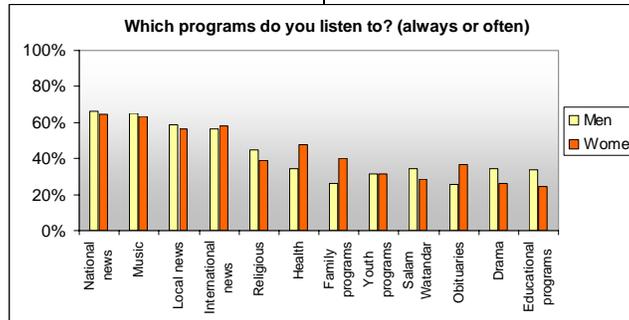
Less geographically specific programs split their audience between stations. Despite some regional variations, local radios are generally preferred for health and religious programs, as well as for music. The BBC is praised for its dramas and Azadi for health and educational programs. **The pattern for preferred television programs** is similar to radio. News and music shows are most

³ *You are the Judge*, produced by Awaz, broadcasted on Internews network stations on the *Salam Watandar* program.

⁴ *New Home, New Life* is a daily program broadcast on the BBC for over a decade.

popular, followed by movies and religious, health, and youth programs.

- In Kabul, the young people prefer **Tolo TV** for its entertainment features and for the quality of its news bulletins. One program, *Danesyar*, was highlighted for its innovative investigative approach.⁵



- **RTA (Television Afghanistan)** was considered as a good compromise, offering a combination of entertainment programs and quality

news, music, and educational programs. Women and adults often cited it as the best channel in general, though some felt that it is not innovative enough.

4. Comprehension

General comprehension levels of media are good within the surveyed population, but **some difficulties** were found in specific cases.

- 20% of the surveyed population admitted having some problems understanding radio programs. The stations easiest to understand are local. The most difficult is the BBC. However, its sophisticated content is still valued for the amount of knowledge and learning it conveys.

- Radio content testing identified further issues, beyond acknowledged comprehension problems. Limited **vocabulary** (particularly for understanding foreign words and concepts), lack of **basic education**, and general **inattentiveness**.

5. Trust

Trust in media is generally high with differences based on the type of media, proximity, past record, and perceived level of resources and independence from outside influences.

Trust, listenership and programming preferences are closely related to each other.

- The BBC is the most trusted source for international news (57%).

⁵ See the pilot research conducted on ten families in III-1-5. *Television in Kabul*.

- Radio Afghanistan ranks first for national news (54%), although it is perceived to be aligned with the central government.
- Azadi has a fair balance in trust between international (48%) and national news (31%).
- Local independent stations tend to be trusted in their coverage area for provincial and local news (56%), as well as health (29%) and religious issues (37%).
- Provincial state stations have been able to build a high level of interest and trust among local audiences, often despite their natural bias.

Television penetration remains too low to compete with radio in overall trust, but is highly regarded by viewers.

- Television is highly trusted by people who watch it (44%), particularly **international news (76%)**.

Trust in the press is less consistent.

- Readers express that newspapers have a greater responsibility than radio and television, but are often more politically aligned than broadcast media.
- Overall the press is highly trusted by its readers on international news (62%), but less so on other subjects.

Lack of independence does not mean loss of trust: self-censorship is often accepted as unavoidable. People may trust certain media sources for their news, even if these sources cannot criticize local powers because it could put journalists at risk.

Radio Afghanistan is perceived as being controlled by, and often biased towards, the central government, but remains a **national symbol** in which many Afghans want to believe. It is the station that brings “all Afghans” the national news.

6. Perception and reservations

General perception

Media have a strong positive image throughout the country and are seen as a:

- reliable source of information that brings new and good ideas.
- major provider of education, particularly in rural areas and for women.

- vehicle of progress and social development. It helps to highlight and develop the positive aspects of Afghan society, while eliminating the negative.

- major tool to enhance accountability of political, social and military leaders, as well as the international community.

Active media users are considered with respect by their peers.

Expectations from the media are higher in rural areas than in cities.

- Rural communities generally have few alternatives for accessing information and educational programs.

- In some isolated provinces, interviewees expressed frustration at not having enough media, and would like to develop local media in particular.

Local media are seen as a way to promote local languages and identity.

- In many Pashto-speaking areas, a feeling of under-representation in the national media was noticed. This is part of a common fear that the language is dying. In this context, local media is considered as a way to preserve and promote Pashto language and culture.

Media are seen as suitable for all public.

- 86% of men stated that radio was suitable for women. However, some variability was seen: Khost province (favorable at 70%) and Herat, Balkh and Badakhshan (favorable at 95%).

Media development is considered as a major asset but not a priority among reconstruction programs.

- Most interviewees believe that it is important to support the media in Afghanistan. However, media is ranked 9 out of 10 top development priorities, such as roads, disarmament and education.

Freedom of speech and independence of the media are concerns for a significant number of interviewees. Biased media are easily identified: sources perceived as non-biased gain significant respect from users.

However, the distinction between public and private media is still blurred.

Sensitive issues

Most issues can be discussed as long as religious perspectives are respected.

- Political issues are easier to raise than social issues.

- Disarmament of local militias and criticism of the Taliban and local commanders top the list of sensitive topics that people would like more coverage of.
- Social issues must be handled more cautiously. Abortion, homosexuality and prostitution can be raised only in order to be denounced as un-Islamic. The subject of dating is also taboo in most places.
- However it appears that most topics, even those considered taboo, can be debated if the announcer, presenter or author has enough moral, religious and technical authority.

Resistance to the media

There is **no visible resistance to radio** as a whole.

- The mullahs and *shura*⁶ leaders themselves listen to radio and no criticism was noticed.
- Negative attitudes towards media were reported more from some local commanders and militia men, than from religious leaders.
- A generation gap does exist with music. More conservative and traditional listeners criticize Indian music, preferring Afghan, or even better, local singers.

The major reservations observed were for satellite television as it allows access to programs judged as contrary to Islam.

- As a consequence, access to satellite television is subject to more social control than other media.
- This medium is seen by the most religious people as potentially harmful for the integrity of believers. Usually, mullahs listen to radio like everybody else, but watch television less – sometimes fearing that they would be suspected of watching the “wrong” programs.
- Very often those without television are the most critical, but tend to change their mind once they gain access.

Resentment against the growing importation of **Indian entertainment** content is, as noted, strong among the conservative, as well as some mothers, who argue that it has a bad influence on teenagers and projects a negative image of women. Some also argue that Afghan culture is being destroyed by this “invasion”.

⁶ A *shura* is a local council of elders.

6. Integration into the Community

People often discuss information obtained from media with their friends and family.

- 83% of radio listeners, 82% of television viewers and 86% of newspaper readers talk with others about what is in the media.
- Some members of the community, who are known to be avid media consumers, relay the information to others. Most of these are men over 30 years of age that are not necessarily the most educated, but are curious and have time to listen to the radio.

Radio listeners are keen on **interacting with the local stations.**

- The use of letters from the community for feedback was observed as a popular and successful strategy. Many local stations receive several hundred letters every week.
- Listeners take part in station activities through interviews, testimonies, music requests and game shows.

On the whole, people regard media as an important asset for the community and an **integral part of their everyday lives**. As media continue to develop in Afghanistan, so too will public participation in it.

7. Media and other sources of information

Traditional sources of information are not only comprised of community leaders (elders, mullahs, shura members, maleks and commanders), but also of informal information networks through sources such as barbers, avid listeners, commuters, travelers, as well as word-of-mouth.

On average, people trust media more than other sources of information.

- Media are generally viewed as being able to give more exact information than friends, family, or neighbors because they have more resources at their disposal.
- Experts are an important alternative to media on technical aspects (for example doctors and nurses for health, mullahs for religion).
- **Mullahs are not generally consulted outside religious topics** and in some places are seen more as public servants than community leaders.

On specific fields less covered by the media, **traditional sources take over** the central role of information dissemination. This is particularly true

at the community level, where word-of-mouth plays a major role.

institution building are well received and often cited as important steps for rebuilding the country.

| What sources do you trust on these topics? | | | | | | | | |
|--------------------------------------------|--------------------|-------------|-----------------|------------|--------|----------------------|----------|---------|
| | International news | Afghan news | Provincial news | Local news | Health | Elections & politics | Religion | Average |
| Radio | 88% | 83% | 62% | 63% | 54% | 58% | 52% | 66% |
| Television | 76% | 53% | 38% | 37% | 39% | 32% | 35% | 44% |
| Newspapers | 62% | 33% | 29% | 27% | 22% | 21% | 24% | 31% |
| Family | 25% | 17% | 17% | 18% | 17% | 15% | 19% | 18% |
| Friends | 24% | 17% | 18% | 19% | 16% | 15% | 11% | 17% |
| Neighbors | 23% | 16% | 17% | 17% | 14% | 14% | 8% | 16% |
| Mullah | 11% | 3% | 3% | 4% | 4% | 4% | 40% | 10% |
| Expert | 12% | 5% | 4% | 5% | 32% | 5% | 6% | 10% |

Figures computed on the respective audiences of the different sources (1507, 1243, 441, 181)

- On reconstruction and development issues, there is a lack of dedicated programming. This relegates information dissemination to word-of-mouth, which is generally negative regarding these issues.

Mullahs and elders retain influence, but normally only on specific issues. **Male family members remain the most important and trusted figures** to the large majority of interviewed Afghans (80%).

- Although community leaders are often consulted on daily issues, they do not appear to be a strong influence on people’s final opinions, which results more from family discussions and information obtained from the media.

Traditional sources often serve as a secondary channel for disseminating information diffused by the media.

- Sometimes traditional and media sources work together. This was observed in some villages, where vaccination campaigns or poppy eradication issues were decided by the *shura*, after campaigns on the radio triggered public discussion.

8. Impact

Without historical data or former baseline research conducted in the same communities, it is difficult to get an accurate grasp of the changes generated by the media in the last three years.

Nevertheless, the enhancement of information sources, as well as the increasing educational role of the media, is considered as **a major factor of progress** by most of the people interviewed.

- Messages on issues such as democracy, return to school (particularly for girls), disarmament and

- Knowledge of different cultures and traditions (both within and outside Afghanistan) is welcomed: many see it as important to compare their lives with different but acceptable social models.

Media are acting as a **forum**, where people have, often for the first time, the **opportunity to share their concerns**.

- Many sensitive issues (forced marriage, dating, divorce, revenge killing) are brought out in social debates broadcast through the media. This often has an effect of **collective catharsis** that many media users see as a positive first step. However, acknowledging problems does not mean solving them immediately. Changes are slow.

“Before I started listening to the radio, I used to be a very conservative person. For example, I forced my sister to marry a man she did not know. Since then, I have changed and I will let my daughter marry the person of her choice.”
Saidullah, 38, shopkeeper, Parwan

- Many points of Afghan tradition are discussed and compared with, often less strict, Islamic Law. In a number of cases, **interviewees declared that they had already changed their minds**, and will probably change their behavior accordingly.

The impact of public information campaigns is clear.

- Media, **combined with other information sources**, helped to facilitate the 2004 presidential elections. Radio conveyed technical information about schedules and locations, and encouraged voting, while civic educators and local leaders focused on more direct interactions and targeting specific problems.

- In the regions where poppy growing is prevalent, the media, coupled with the support of mullahs and community elders and the use of religious arguments, has facilitated acceptance of the government ban.

“We discussed the ban on poppy growing a lot among farmers. Some of us heard on the radio that it is contrary to Islam and that the Prophet condemns the cultivation as well as the use of drugs. Therefore, we decided to stop, but now we know our economic situation is uncertain.”

Saïd, 39, farmer, Nangarhar

Overall, public information campaigns as well as social programs have been well received by media users, and often relayed by discussions and debates at the community level. **Impact** on behavior only **results from a combination of messages and sources**, which must interact with each other.

Although public information approaches should be adapted to each issue, the following recommendations can be made:

- **Multi-channel campaigns are the most effective:** radio, television, press, posters and direct community mobilization through civic educators and social workers reinforce each other.
- Various programming formats can, and should, be used as long as the message is consistent. By using more than one format, echoes are created and the audience obtains verification by hearing the same message from different sources.
- Dramas are the most accessible programs for women and the less educated, but experts, or debates also raise high interest. Programs need to be carefully adapted to the different segments of the population.
- **Traditional sources**, in particular local *shuras*, **should be targeted** and take part, when possible, in public information campaigns.

9. Women and media

Women are active media users in most areas surveyed.

- Women mostly look to media for education and entertainment.
- They show a preference for local issues and music on local radio. However, they also have a strong interest in international and national news, as well as family and health programs.

- They tend to listen to stations that use the language they understand the best.

- Women generally have **very specific expectations** concerning radio programs targeted at them. These include:

- more local programs devoted to health, presented by female doctors;
- programs on women’s rights and their social conditions, presented through roundtables featuring educated women debating important issues;
- reports on women living abroad and their ways of life, in order to become more knowledgeable of other cultures from a female perspective.

The tastes, expectations and concerns of women towards radio vary noticeably with their educational level.

- Illiterate women are more concerned with their immediate family and with life in the community.
- Educated women feel the need to broaden the scope of information available to them, so they can obtain a better outlook on society and the world, as they look to define their role in their own society.

Targeting women: radio programs designed for women should be aired during the afternoon. When providing female perspectives as a part of more general programming, it may be useful to broadcast in the evenings when the whole family listens together.

10. Conclusion

Three years after, the first phase of media development in Afghanistan can be considered a success, thanks to the efforts of many actors, from local journalist networks and private initiatives to donors and NGOs. The coordination of efforts has allowed for the development of a large variety of media covering most of the country. The majority of rural areas, however, are still limited to a few AM stations and other media require further development.

Next steps:

This study has shown the integration between media development and the rebuilding of Afghanistan. Media has long been one of the reconstruction priorities. It is now playing an integral role in the process. There are several areas where this is happening, and will need continued strengthening:

- **Entertainment** is a fundamental role for media. Care will have to be taken to accommodate the different tastes of an increasingly segmented audience.
- **News and information** dissemination has been relatively successful. However, work remains in improving provincial news and providing regular updates on reconstruction activities.
- **Educational** programs are consistently cited as useful and important, and nearly all media users are longing for more.
- **Social debates** provide a forum for the public to take part and express their opinions. These debates were found to be especially active at the community level through local radio stations. There are few subjects off limits, if treated appropriately. Such open discussions promote local ideas and solutions that are more accepted and thus often more effective.
- **Accountability of local and foreign actors** is something that Afghans would like to see the media promote. Many local managers agree but still face serious challenges and risks. Self-censorship is common and remains a necessity for the survival of many media outlets.

It is likely that the Afghan media audience will evolve faster than the country's media. Journalists, managers and media development specialists will have to use innovative approaches to meet changing and maturing demands while respecting the traditional roots of society. This will be one of the **major challenges in the next three years.**

Quotes

Education

"The communists had tried to impose education of girls and their schooling through use of force: as we know, this was a failure. Radio has adopted the opposite route, gaining acceptance gently so that from here on, most people in the region will send their daughters to school." Abdullah, 50, Village 1, Gardez.

Sensitive issues

"There is no need to talk about sex, child abuse and divorce, because it does not happen here." Tribal elder, Village 1, Khost.

Women

"As we respect our culture, we prefer that our father or our brother choose the newspaper we should read." Young teacher, Baghlan

Censorship

"As long as there are weapons in Afghanistan, there will be censorship for media." Journalist in Balkh Province.

Word of mouth

"With word of mouth, one crow becomes forty crows, as says the Dari proverb." Female interviewee, 25, Ghazni.

Reconstruction

"I'm optimistic for the future because everybody knows that if they don't help Afghanistan a lot of "September 11th" will happen again." Male interviewee, 35, Jalalabad.