



United States Agency for International Development  
Office of Program and Project Development

**USAID/Russia Independent Television Program**

In-house survey of the Program participants

Moscow 1999

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## List of abbreviations used in the report

NAT	National Association of Telebroadcasters
RTDF	Russian Television Development Foundation
MMPLC	Moscow Media, Law and Policy Center
GDF	Glasnost Defense Fund
OSI	Open Society Institute (Soros Foundation)
IRES	International Research and Exchange Board
CDC	Citizens Democracy Corps
RART	Russian Association of Regional Television
USAID	US Agency for International Development
USIS	US Information Service
NPI	National Press Institute

# USAID/Russia Independent Television Program Evaluation

## In-house survey results

### Introduction

This evaluation assesses the impact and effectiveness of the USAID Independent Television project in helping to develop the emerging Russian regional independent (non-state) television sector.

Although the program has been implemented by Internews Network (USA) and Internews (Russia) since 1992, the evaluation covers program implementation only for the past four years, from 1995 to the present.

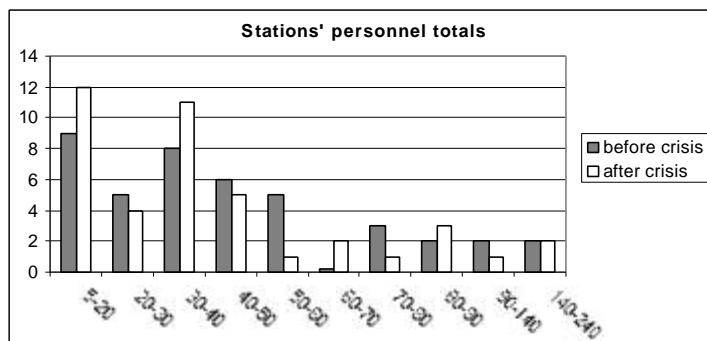
As a preliminary step of the evaluation, it was recommended that a survey of all the Internews-supported TV stations be conducted. The data collected by the survey will address some of the evaluation questions, assist the evaluator in selection of sites to visit and serve as a background for the evaluation. At the same time these results may serve as an independent source of information and a tool for further program development.

In February 1999, a questionnaire consisting of 39 questions was designed and disseminated by e-mail and fax to more than 120 independent regional TV stations, assisted by Internews. The questionnaire was designed based on suggestions from the Office of Program and Project Development (PPD), the Media Unit in the Office of Democratic Initiatives and Human Resources (DIHR) and Internews/Russia. It consists of two major sections: A. Impact of Internews assistance on the development of TV stations; and B. Client profile. Section "A" is split into two parts: questions for all assisted TV stations; and additional questions for TV stations that hosted consultants' visits.

Directors of TV stations and their deputies were chosen as the target audience for the survey. It was initially anticipated that such a high level target audience would result in a low percentage response. Hence, it was not unexpected that only 40% of all questionnaire recipients replied. USAID collected 48 valid and completed forms which were tabulated (see attached Table) in order to make further analysis possible.

### Respondents profile

The 48 stations that submitted responses vary greatly in their geographical location, size (number of employees), audience, equipment, and other factors. Such variety allows us to use collected statistics for general conclusions, even though Internews has assisted a much larger number of stations. The number of employees varies from 5 to 240 with a rough total of two

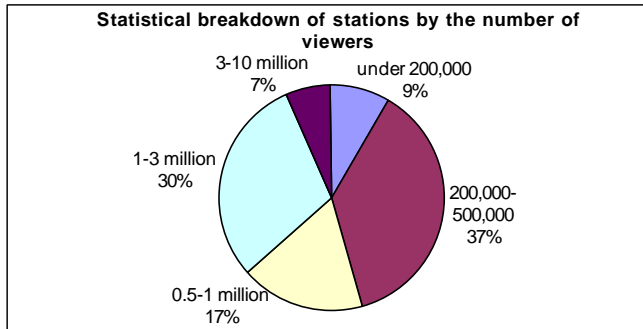


the financial crisis, most TV stations in our pool of respondents had to cut their personnel by 8.6% on average. Hence, as illustrated in the diagram on the left there was a tendency for stations to move down to categories with lower personnel numbers. This diagram shows the numbers

thousand for the whole sample. As a result of

category: 5-20 employees, 20-30 employees, 30-40 employees, 40-50 employees, etc.

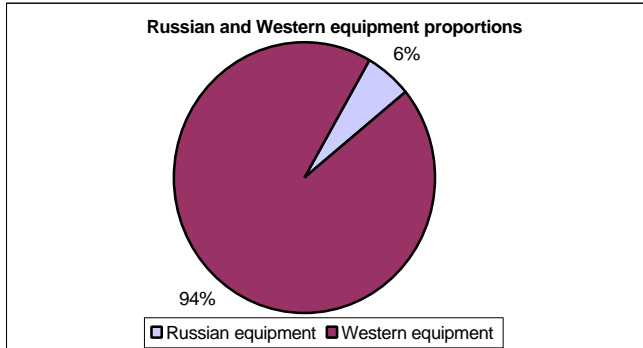
About 60% of the respondents represent small regional TV stations with staffs of less than 50 employees and with audiences of one (35%) or two cities (18%). However, among respondents there are also stations with 12 or even 20 cities in the area of coverage. The stations from the sample cover a total of 38 cities (see attached appendix with the list



of cities) and have an approximate overall potential audience of 23.5 to 61 million. As it shown in the pie-diagram on the left, most typically our sample stations have an audience of either 200 – 500 thousand people (37%), or one-three million (30%). The remaining stations have quite different ranges of viewers, i.e. from one - five thousand to

three-ten million. Such a wide variety of TV stations covered by the survey makes the data collected more broadly representative and will strengthen the possibility of further generalization of conclusions from this report.

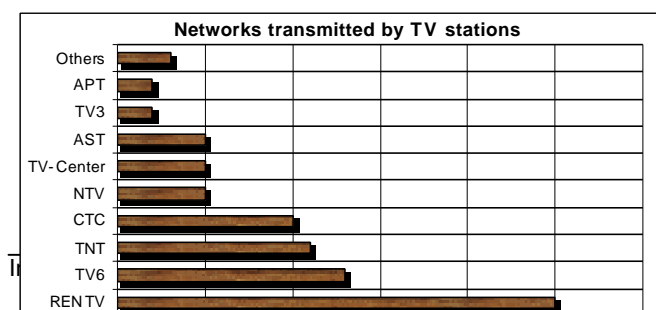
More than half of the stations (53%) use only western-made equipment but the others also use Russian-made equipment. Specifically, independent Russian regional TV stations



use Russian and western made equipment in overall proportions as shown in the pie-diagram below on the right. The responses received revealed that after the crisis some stations do not plan to buy more new equipment for a while. This might promote greater purchasing of Russian-made equipment instead of Western equipment, because the former is obviously cheaper. In fact,

one station replied that 60% of its equipment is Russian. However, the quality and reliability of Russian made TV equipment is very low, so stations strongly prefer to purchase Western equipment. Western equipment has become much more expensive in ruble terms after the devaluation in August-September 1998, so most stations must wait indefinitely before attempting to replace much equipment.

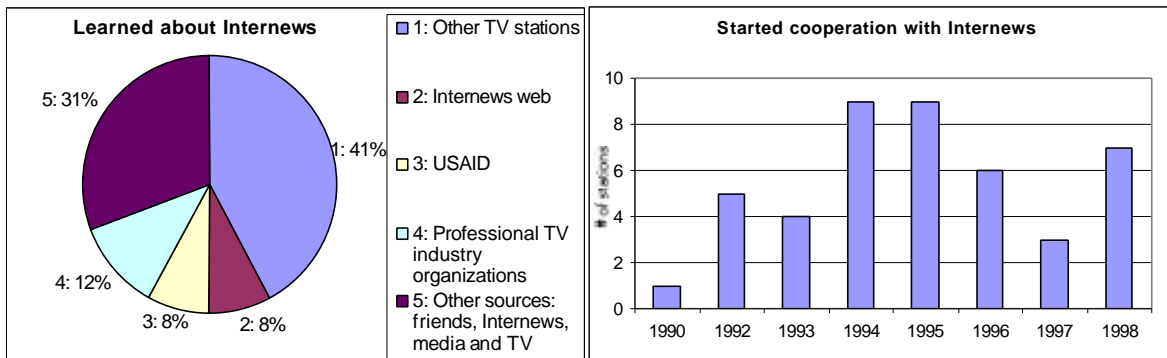
Most TV stations transmit over one, two or more networks. The most popular networks broadcast by the respondents are REN TV (56% of respondents), TV6 (29%), TNT



CTC (22%). Among other channels which are being broadcast by 3-10% of TV stations are NTV, TV-Center, AST, TV3, NVS, MUZ TV and St.Petersburg's Channel 6. The breakdown of the stations which broadcast these channels is shown in the diagram on the left. At least two of these networks, REN TV and, to a lesser extent TNT were created

(24%) and participation. As to TV stations, after they learned about Internews, they received access to its programming either separately or as part of a network. Most stations (47%) learned about the Internews activity in Russia from colleagues or friends from other TV stations. Information about the Internews program was also available from professional television industry organizations such as National Association of Telebroadcasters (NAT) and Russian Television Development Foundation (RTDF), Internews Web Page and USAID as shown in the diagram below on the left.

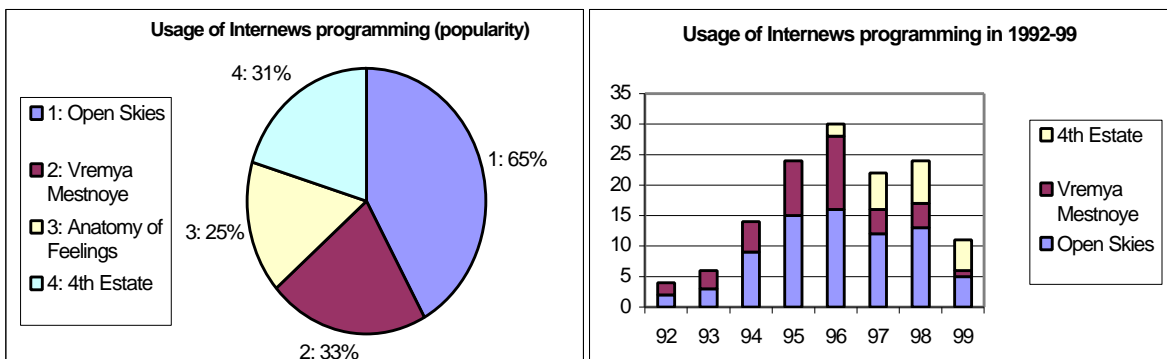
The very first station which learned about Internews started its cooperation with them in 1990. All the subsequent years until 1998 were full of new stations which started to receive assistance from the program with a peak in 94-95, when almost half of the respondents as shown in the trend below on the right began their collaboration with



Internews.

### Support with programming

In this collaboration “programming” provided by Internews was one of the most significant areas of assistance and some TV stations (25%) continue to use these programs. The most popular program among station from the sample is “Open Skies”. 65% of the stations made use of this program versus 33% for “Local Time”, 25% for “Anatomy of Feelings” and 31% for “4<sup>th</sup> Estate”. In the diagrams below there is a graphic presentation of the popularity of these programs and breakdown of their usage from 1992 to 1999.



According to the respondents, at least 56% of stations believed that as a result of Internews programming they broadened their audience, while 17% of stations attracted new advertising clients. Also, some stations identified that their image was improved, and they saved funds using free programming.

## Seminars

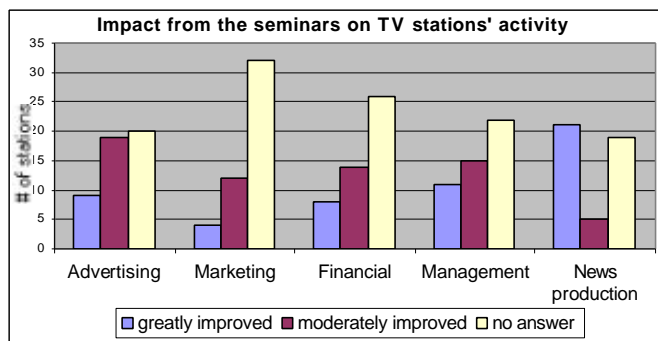
Internews also assisted TV stations through seminars addressing different TV-related topics such as:

- Journalism/News Production;
- Business/Management;
- Advertising Sales;
- Financial Management/Accounting.

See the table below for a breakdown of attendance and a rating of the impact of these seminars by the TV stations. The last column for each seminar shows how many stations would like to send their employees again to the same topic seminar plus those stations which have not participated yet but would like to.

Seminar	Participating stations	Impact (marked)	Would like to participate (again)
Journalism/News production	65%	97%	73%
Business/management	46%	95%	69%
Advertising Sales	56%	93%	63%
Financial management/Accounting	40%	92%	54%

A total of 219 employees from the stations in our sample participated in the four types of seminars. Most of them (124 specialists) participated in the journalism/news production seminars. 85% of the stations from our sample report that employees who attended these seminars were able to pass on what they had learned to other staff members. The impact on the work of TV stations in terms of overall improvements in five specific departments can be seen in the diagram below. While half of all respondents did not answer the question about the seminars' impact, those who did

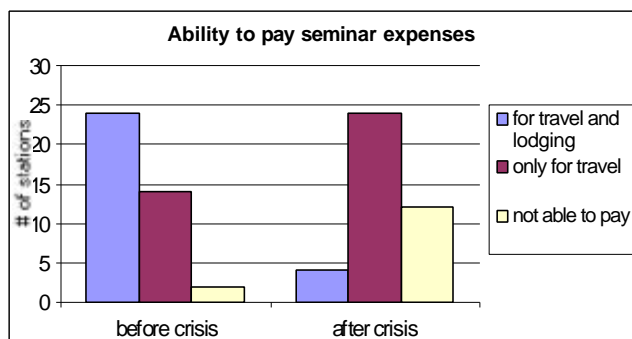


mostly think that the work of their departments was moderately improved after personnel training. At the same time 8% to 18% of stations think that the work of their departments has shown great improvement. Especially successful were "News Production" seminars from both attendance and impact points of view. 44% of stations think that the work of their news departments was improved greatly

after the seminar. Although among the collected responses there are only "moderately improved" and "greatly improved" indications but no "no improvement" at all, it should be mentioned that there is still a chance of a "polite" answer and some TV stations which are in the category "no answer" to this question could be considered as possible "no improvement" respondents.

All participants can be split into three groups based on their ability to pay: those who paid both their travel and lodging, those who were able to pay only for travel and those who were not able to pay at all due to their companies' difficult financial situation. After the crisis in Russia

the number of attendees unable to pay their expenses increased in proportion to those who still can. The diagram below shows these proportions in detail.



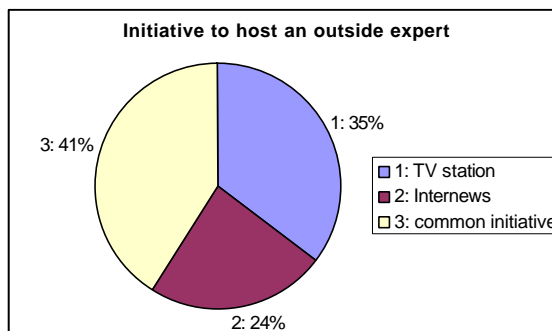
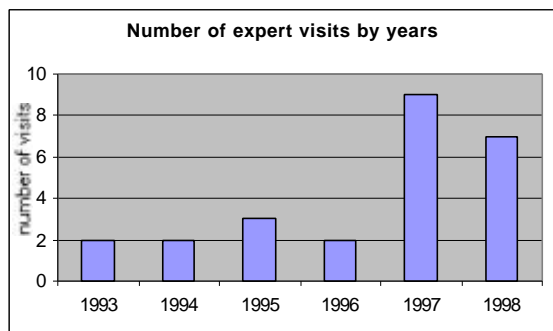
The financial crisis influenced TV stations also by reducing their staff, programs, advertising revenues and funds for new equipment purchases. Almost half (42%) of the respondents had to cut their personnel; almost all the stations (98%) reduced the number of their programs, in some cases up to 80%. Advertising revenue was cut for 46% of the companies while 6% decided not to buy new equipment.

However, 100% of the companies that responded are sure that they will survive this time of crisis and indicated that Internews' assistance is increasing their chances of survival. 75% of stations use textbooks on diverse professional topics published by Internews for their work and 58% use Internews publications for the training of their personnel. Besides Internews, 58% of respondents work with other organizations which provide technical assistance to independent media. Among these organizations there are Glasnost Defense Fund (GDF), Moscow Media, Law and Policy Center (MMLPC), Russian Association of Regional Television (RART), National Association of Telebroadcasters (NAT), and in a few cases stations indicated that they work with National Press Institute (NPI), Open Society Institute (OSI), Citizens Democracy Corps (CDC), US Information Service (USIS) and International Research and Exchange Board (IREX).

### Expert visits to stations

Another type of Internews assistance were visits of volunteer consultants to selected TV stations with specific assignments and goals. Most TV stations (27%) learned about the opportunity to host experts from the information sent out through the Internews' list serv and a few of them either from friends (6%) or from professional TV industry organizations, such as NAT and RTDF (2%).

35% of the stations in the sample have been visited by experts. In the diagram below on the left we can see a breakdown of visits from 1993 to 1998. The diagram below on the right shows where the initiative to invite outside expert lies.



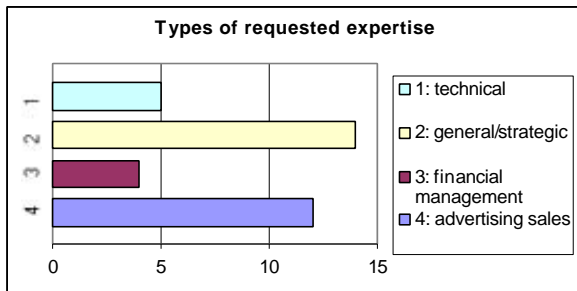
The usual time lapse between the initial request and arrival of the expert was one to five months (for 59% of stations which invited consultants). For 12% of the



companies visited it took even less than a month. There was also a four to six month time lapse (5% of firms) or even more than eight months for 12% of TV stations. Expertise provided by outside

consultants was focused on one or more topics from the four following areas:

- technical expertise (process management and innovation);
- general/strategic expertise (long-term strategy and business organization);
- financial management expertise (measuring and managing numbers to improve management or labor performance, or preparation of business plans to seek financing);
- and advertising sales expertise.



The amount of different types of expertise requested by TV stations is illustrated in the diagram on the left.

All assisted TV stations from the sample reported that experts completed their tasks and achieved the objectives of the assignment. Most stations which were assisted by the financial management

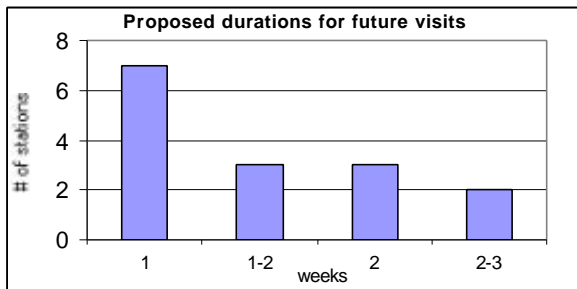
expertise (or 18% from the number of all visited) think that it helped to attract outside investors without political agendas (i.e., investors interested in TV as a profit-making business). For all visited TV stations the impact of this type of Internews' assistance on the work of their major departments or activities was as follows:

**The impact of expert technical assistance on the work of TV stations**  
(in percent to the total number of visited stations)

Department or activity	Greatly improved	Moderately improved	No improvement	No answer
Advertising revenues	24%	12%	12%	52%
Financial management system	6%	35%	6%	53%
Overall management system	29%	41%	6%	24%
Programming policy	41%	18%	6%	35%
Audience increased	41%	6%	6%	47%

An important "sign of success" of this support to regional TV stations is that almost all visited companies from those which were covered by the survey (with only one "no") said that they would like to invite another expert in the future. Their main preferences for areas of expertise are: advertising sales and production, programming and news production, marketing and

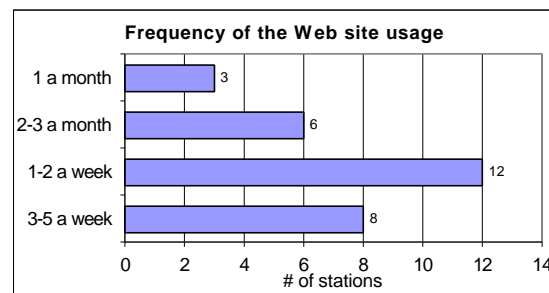
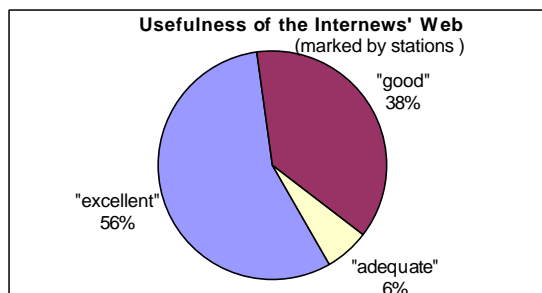
financial management. 71% of stations which want to host another expert would not be willing or can not afford to pay for their services while 24% would be ready to pay approximately \$15-50 a day. The preferences for the length of possible visits were proposed by respondents as illustrated on the left.



## Internews' competitions, Website and other assistance

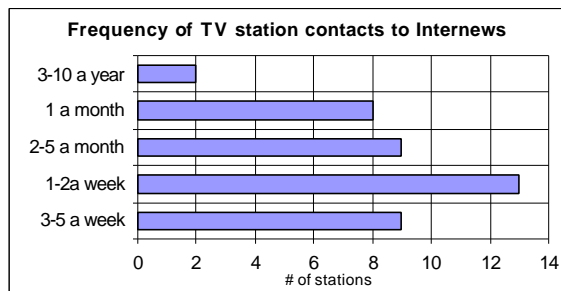
Another new activity initiated by Internews is the Regional News Competition in 1998-1999. 92% of respondents heard about this competition and 58% planned to take part in it while 16% were not interested. A total of 265 stations participated in this competition during the first year. Another new activity was the Public Service Announcement (PSAs) competition initiated by Internews as crisis-related emergency assistance. 69% from the sample took part in this activity, from which 40% submitted a scenario, 31% produced a PSA, and 67% broadcast a PSA.

According to their responses, almost all stations (96%) have access to the Internet, some of them thanks to Internews-provided equipment. In previous years Internews provided some TV stations with modems, computer graphic boards and other equipment in some cases (video cameras, notebooks, software). Modems were received by 6% of stations from the sample; computer graphic boards were received by 13% of the sample; and satellite equipment was received by 4% from the sample. Among respondents enjoying access to the Internet, 65% use Internews' Web site while 21% do not. As illustrated in the pie chart below 56% of Internet-connected stations noted the usefulness of Internews' Web site as "excellent"; 38%: "good"; and 6% as "adequate". The accompanying bar graph below on the right shows the



frequency of the respondents' visits to Internews' Web Page.

TV stations receive information from Internews not only through Internet but also by phone, fax and e-mail. 90% of stations think that the information they receive from Internews is useful and 58% have asked Internews for specific advice on legal



new equipment purchases, management and funding sources. Many respondents have marked Internews responses as "excellent" (44%) or "good" (10%). On average, the frequency of the respondents' contacts to Internews for any sort of information is illustrated on the left.

issues, taxation, training,

Media legal issues represent a high priority for TV stations, so respondents often request legal advice not only from Internews but also from other media support organizations such as MMPLC and GDF. In our sample Internews remains the leader in such support with 65% of respondents having received information or advice on legal issues. 58% received such information and advice from MMPLC, and 23% from GDF. The most vital information on legal issues is licensing, proprietary legal issues,

legal protection of journalists, law and media management, laws for children, alcohol/tobacco advertising, taxation and labor law.

Finally, the other types of support Internews gives to regional TV, not yet mentioned, were: analysis of the presidential campaign in Russia, financial support, representation of interests, meetings/conferences and video materials. From the respondents' point of view, the most beneficial and useful among all types of assistance have proven to be trainings and seminars, competitions, professional literature, programming, access to information, and financial support. More than half of the respondents (56%) think that Internews was very responsive to their needs and changes in their development and they marked it as "5" on a scale of 1-5 where one is the lowest mark and five is the highest. 25% marked Internews responsiveness as "4". One-fourth of this 25% was rejected when they approached Internews for either free of charge "Betacam" tapes or additional trainings.

Overall, most of the respondents were very positive about the assistance provided by Internews and think that it is very useful. In the section for specific recommendations of the questionnaire they propose:

- to continue Internews' activity in Russia;
- to conduct more trainings on advertisement production and sales;
- to provide TV stations with more information and trainings on computer issues;
- to provide TV stations with more information and trainings on crisis related issues;
- to provide TV stations with financial support and equipment.

**Attached:**

- Annex with the list of cities (where TV stations which responded to the survey are located)
- List of regional TV stations

**List of cities where respondents are located:**

#	City	Response assigned #	q-ty of stations	Audience numbers
1	Stavropol	1	1	
2	Sochi	2	1	
3	Petrozavodsk	3	1	
4	Samara	4	1	
5	Saratov	5, 28, 42	3	1100 1000-3000 1100
6	Ulyanovsk	6	1	
7	St.Petersburg	7, 48	2	3000-10000 3000-10000
8	Cheboksari	8	1	
9	Kazan' (14)	9, 14, 35	3	1000-3000 500-1000 1-5
10	Velikiye Luki	10	1	
11	Nizhny Novgorod	11	1	
12	Krasnodar	12	1	
13	Ekaterinburg	13	1	
14	Rostov na Donu	15	1	
15	Yuzhno-Sakhalinsk	16, 37	2	200-500 200-500
16	Cherepovets	17	1	
17	Siktivkar	18	1	
18	Kaliningrad	19	1	
19	Kirov	20	1	
20	Tambov	21	1	
21	Orel	22, 32	2	200-500 200-500
22	Ribinsk	23	1	
23	Pyatigorsk	24	1	
24	Perm'	25, 27, 40	3	500-1000 1000-3000 1000-3000
25	Zelenodolsk	26	1	
26	Tomsk	29	1	
27	Pskov	30	1	
28	Obninsk	31	1	
29	Smolensk	33	1	
30	Ivanovo	34	1	
31	Kursk	36	1	
32	Pechora	38	1	
33	Vladivostok	39	1	
34	Khabarovsk	41	1	
35	Magnitogorsk	43, 47	2	200-500 ???
36	Kostroma	44	1	
37	Irkutsk	45	1	
38	Uzlovaya	46	1	

## TV stations E-Mail list

No	Station name	E-Mail
1	Азов ТК 'Пульс'	<puls@puls.rnd.su>
2	Альметьевск ТК 'Луч'	<alex.almet@rex.iasnet.ru>
3	Архангельск ТК 'АТК'	<atk@mail.sts.ru>
4	Балаково Экспресс	<root@expres.saratov.su>
5	Барнаул ТВ-Мир	<tvmir@altgate.altai.ru>
6	Барнаул ТОО ТРИ Катунь	<Katun@glas.apc.org>
7	Бийск ТВ-КОМ	<alex@tvcom.altai.su>
8	Великие Луки Импульс ТВ	<itv@mart.ru>
9	Великий Новгород 'Триада'	<triada@telecom.nov.ru>
10	Владивосток Восток-ТВ	<vostok@vostok-tv.marine.su>
11	Волгоград 'ТРК АХТУБА'	<ahtuba@reg.avtlg.ru>
12	Волгодонск Волгодонский вестник	<nata@ktv.vdonsk.ru>
13	Воронеж '33й канал'	<vgiv@hs.comobi.ru>
14	Гагарин Орбита плюс	<nord153@glasnet.ru>
15	Екатеринбург АТН	<atn@dialup.mplik.ru>
16	Екатеринбург ТК 4 Канал	<frolov@channel4.mplik.ru>
17	Железногорск Сигнал	<signal@pub.sovtest.ru>
18	Зеленодольск 'Зеленый Дол'	<tvzed@tbit.ru>
19	Иваново БАРС	<post@bars.ivanovo.ru>
20	Иваново ТК '7x7'	<7x7@tpi.ru>
21	Ижевск Арсенал	<vadim@data.udmurtia.su>
22	Ижевск 'Новый Регион'	<dady@tv.nregion.udm.ru>
23	Иркутск ТК АИСТ	<alex@aist.irkutsk.su>
24	Иркутск ТРК АС Байкал ТВ'''	<ann@batvir.irkutsk.ru>
25	Казань ВарианТ	<variant@tatincom.ru>
26	Казань 'Канал -6'	<info@chan6.kazan.su>
27	Казань ТК Эфир	<dik@efir.ksu.ras.ru>
28	Калининград ТРК 'Каскад'	<igorros@kaskad.koenig.su>
29	Калуга ТК Ника ТВ	<nikatv@kaluga.ru>
30	Киров Гранд ТВ	<rashit@grandtv.kirov.ru>
31	Кисловодск ТРК СИФ'''	<sif@mail.narzan.com>
32	Клин Поиск	<tvklin@chat.ru>
33	Кострома Русь	<andy@kostroma.org>
34	Красноярск ТВК-6 канал	<tvk6@krsk.ru>
35	Красноярск ТРК Афонтово	<root@root.afon.krasnoyarsk.su>
36	Красноярск-26 Городское телевидение Канал-12	<slava@eridan.krasnoyarsk.su>
37	Курск ТК 'Такт'	<takt@pub.sovtest.ru>
38	Липецк ТК ТВК	<kurier@tvkmail.lipetsk.ru>
39	Магнитогорск 'ТЕРА-С'	<tera@pandora.maginfo.net>
40	Магнитогорск ТК 'ТВИН'	<Alexei@mmk.ru>
41	Назарово ТКЦ 'ТВ-Назарово'	<chulym@public.krasnet.ru>
42	Нальчик 'ТК Александр и К'''	<root@alex.nalnet.ru>
43	Невинномысск 'Телетекст'	<nsk@minas.rosmail.com>
44	Нижний Новгород 'Сети НН'	<root@setnn.nnov.su>
45	Нижний Новгород ТК Волга	<adv@volga.nnov.su>
46	Нижний Тагил 'ТК Телекон'	<secr@telecon.unets.ru>
47	Новгород ТВС-Новгород	<tvs@telecom.nov.ru>
48	Новороссийск Новая Россия	<efir@trknr.kuban.ru>
49	Новосибирск НТН-4	<info@ntn.nsk.su>
50	Норильск 'НАГО-ТВ'	<nagotv@norcom.ru>
51	Ноябрьск ТК 'МИГ'	<noyabrsk@glasnet.ru>

52	Нягань '32 канал' АОЗТ 'Сибтелеком'	<tvcsib@wscb.tmn.ru>
53	Обнинск СИНВ	<cinv@maxnet.ru>
54	Омск 'Агава'	<agava@agava.omsk.su>
55	Омск Корпорация ТелеОмск-АКМЭ	<ksi@akmetv.omsk.su>
56	Орел Истоки	<istoki@valley.ru>
57	Пенза 'Наш дом'	<nashdom@penza.com.ru>
58	Пермь ВЕТТА""	<eetta@permonline.ru>
59	Пермь Рифей ТВ	<rifvtv@perm.raid.ru>
60	Петрозаводск НИКА	<alfa@nika.karelia.su>
61	Петрозаводск Петронет	<petronet@onego.ru>
62	Петропавловск Лукоморье	<luktv@mail.iks.ru>
63	Псков 'Телеком'	<post@telecom.ellink.ru>
64	Пятигорск Канал 'Машук ТВ'	<mashuktv@megalog.ru>
65	Ростов-на-Дону ТРК 'Южный Регион'	<holdtv@rnd.rostelemail.ru>
66	Рыбинск ТК 'Экосервис'	<r40@yaroslavl.ru>
67	Рязань Прио-Эхо	<tanja@echo.ryazan.su>
68	Самара 'Рио-Эхо'	<rio@transit.samara.ru>
69	Самара ТК 'Скат'	<scat@vis.infotel.ru>
70	Санкт-Петербург 'Региональное ТВ'	<regtv@peterlink.ru>
71	Саратов ИВК 'Солнечный'	<ivk@mail.renet.ru>
72	Саратов 'Славия-Видео'	<postmaster@slavia.saratov.su>
73	Сафоново СНТ	<root@winner.smolensk.su>
74	Северодвинск 'Эста'	<osinin@esta.severodvinsk.ru>
75	Северск Ст-7	<sevadm@sevadm.trecom.tomsk.su>
76	Смоленск SCS	<scs@globus.smolensk.ru>
77	Сочи ТК Лидер связи""	<shpak@tvcenter.sochi.su>
78	Сочи ТК 'ЭФКАТЕ'	<efcate@sochi.ru>
79	Ставрополь 'АТВ'	<atv@avn.skiftel.ru>
80	Старый Оскол 'Радио-ТВ-Телефон'	<semenovp@oskolnet.ru>
81	Сургут 'Сургут Информ'	<nata@sitv.surgut.su>
82	Сургут 'Сургутинтерновости'	<kataev@tvsin.surgut.ru>
83	Сызрань ТК 'КТК-Луч'	<ktv-ray@dtc.syzran.ru>
84	Сыктывкар '3канал'	<anjela@ailant.komi.ru>
85	Тамбов Все для Вас	<Office@vdvtv.Tambov.RU>
86	Тамбов 'Олимп'	<postmaster@olimp.tambov.ru>
87	Тамбов 'Полис'	<postmast@tv-polis.tambov.su>
88	Тверь Пилот	<boss@pilot.tmts.tver.su>
89	Тверь 'Тверской проспект'	<post@tv6.tunis.tver.su>
90	Томск ТРК ТВ-2""	<tv2@tv2.tomsk.su>
91	Трехгорный ТВС	<root@trktvs.zlt36.chel.su>
92	Узловая ТК 'Каскад'	<kaskad@tula.net>
93	Ульяновск '2x2 на Волге'	<stepan@studio.2x2.simbirsk.su>
94	Хабаровск СЭТ	<dmitry@tvset.khv.ru>
95	Чебоксары ТК 'Канал 5 плюс'	<yura@kplus.chuvashia.su>
96	Челябинск Восточный экспресс	<tvvekd@chel.surnet.ru>
97	Череповец 'Провинция'	<provin@metacom.ru>
98	Югорск ТК Норт""	<nord@ttg.gazprom.ru>
99	Южно-Сахалинск 'АСТВ'	<astv@sakhmail.sakhalin.ru>
100	Южно-Сахалинск Европа плюс Сахалин""	<europa@snc.ru>
101	Якутск ТК 'Саха - ТВ'	<sakhatv@online.ru>
102	Ярославль 'Городской канал'	<root@gtk.yaroslavl.su>