



ACSOR-Surveys



D3 Systems, Inc.

Afghanistan Media Survey

Report Prepared for BBC Trust

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BBC TRUST: AFGHANISTAN RESEARCH EXECUTIVE SUMMARY

D3 Systems and its subsidiary in Afghanistan, the Afghan Center for Social and Opinion Research (ACSOR), conducted a national survey of all thirty-four provinces of Afghanistan and conducted forty-eight depth interviews with urban and rural residents of Kabul, Nangarhar, Herat, and Balkh provinces.

Readers of this report should note the meaning of “urban” and “rural” in the Afghan context. Urban residents are those living in population centers with 100,000 or more individuals. They are more likely to be places with paved roads, water and sewage systems, and access to medical or government services. Only 22% to 23% of Afghans live in urban environments. Rural residents are those living in places with less than 100,000 that are far less likely to have paved roads, water or sewage systems, access to electricity, or access to medical or government services. The majority (77% to 78%) of Afghans live in rural environments where conditions are the most basic. There is a growing divide between urban and rural residents in relation to their levels of access to services and opportunities.

BBC Presence in Afghanistan and Relevance

- **BBC listenership in Afghanistan remains strong** and the station has retained a strong brand presence. BBC radio is among the most listened to stations in Afghanistan. Over half (57%) of adults had listened within the past week at the time of the survey in January 2008. 75% of the population claimed to have heard it at some point. Eighty-nine percent of Afghans who have ever used BBC radio or TV indicated they will continue to use the BBC in the future and over three-quarters (76%) say they will recommend the BBC to others.
- **BBC Afghanistan is the service most people still turn to for news and it is the most trusted source of news on TV or radio.** Ninety-percent of BBC listeners feel they can trust the information provided by the BBC. People respect the service for being relevant, unbiased and educational.

BBC radio broadcasts impartial news and programs even from the past years when war existed in Afghanistan and has never lost its trustworthiness. [Female, Non-literate, 35-44, Housewife, Rural]

News program of radio BBC are better than other news programs because it is prepared from trustful resources and is presented with a good style.

[Male, Non-literate, 25-34, Shopkeeper, Rural]

Yes, I have been listening to BBC already. A large number of people listen to BBC radio all over the world. It is a reliable source of information for people. [Male, Non-literate, 35-44, Driver, Rural]

I think it is directed at someone like me and all other Afghans because their news is very understandable and everyone can learn something through BBC. News on BBC radio is better than on other stations because it can be heard clear, they air

breaking news stories and their correspondents are professional. [Female, Literate, 15-24, Student, Urban]

I think the current presentation style of news programs through BBC radio is good because every type of people in our society use BBC; even youngsters refer to BBC. [Female, Literate, 45-54, Housewife, Urban]

- People listen to the service for news, music and drama programmes, and generally enjoy the mix of programmes. Women also rate the women's programmes highly.

When I am listening to BBC news program then I get ready for fresh news about Afghanistan and all over the world. BBC reflects facts related to our country and all over the world it is an experienced radio channel to which our father and grandfather were interested. BBC radio covers different types of programs such as political, news, related to health, educational, entertaining, family dramas and music programs. [Male, Non-literate, 25-34, shopkeeper, rural]

- The service is highly valued but there is increasing competition which is also valued, particularly in urban areas. 53% of respondents agreed with the statement: "Other stations provide news and information that is as good as the BBC in Afghanistan these days" – only 12% disagreed.

The BBC and Afghan Use of the News

Afghans have a strong desire for news and information. The vast majority of Afghans (92%) think it is important to stay informed about current events in Afghanistan. The internal situation remains fluid, and this is a country going through a tumultuous social, economic, and political transformation. Afghans are also keen to stay informed about daily security threats to hear about the continuing struggle between the Afghan government and the anti-government elements, in particular the Taliban, for control over the future of the country.

I like following news about our country because we live in this country and we must be informed of everything which happens in our country. As well as I am interested in listening to the news which shows how real people are affected by what is happening. [Male, Literate, 35-44, Free job, Rural]

- **Afghans are also interested in international news, but mostly when it is relevant to the situation in Afghanistan**, such as decisions about international aid or plans among the international community for involvement in Afghanistan. The international news that Afghans are most concerned with hearing more about is news about neighboring countries. Events in neighboring countries have a deep impact on the economy in Afghanistan, particularly events in Iran and Pakistan. News about Pakistan is of particular interest due to the close ties to family and also longstanding animosities. Many Afghans are concerned about Pakistan's political interests in Afghanistan.

I also want to know what is going on in our neighboring countries to know its negative impact on Afghanistan and the region. As the former Prime minister of Pakistan Benazir Bhutto was killed, it had a very negative impact and prices of all goods and foods. Everything was more expensive coming from Pakistan, and

nobody was able to buy anything because of the weak economic situation it caused. [Female, Non-literate, 35-44, Tailor, Rural]

- Overall, Afghans are eager for all forms of news. They want to know what is happening and they want to be informed. There are almost no forms of news that were rejected as not being of interest, and many of the respondents in the project had a hard time distinguishing what items would be more or less important. What did differ was which sources they go to for breaking news, and which they use for more general information and analysis.
- **The BBC is not always the first source for breaking news now that other sources are available in Afghanistan.** With its frequent news updates, the US sponsored Radio Azadi, has carved out a niche with many listeners. However, BBC continues to be among the most trusted sources, and even if respondents did not seek out breaking news from the BBC, many are inclined to seek out the BBC's perspective on an event or listen for deeper analysis of a situation they learned about through another source.

I tune to radio Arman and Tolo TV for good entertainment and news programs. I listen to BBC news broadcast for better analysis and information of the news.

[Female, Literate, 15-24, Jobless, Urban]

The Rise of Television and Its Contribution to the Urban and Rural Divide

- **The programs produced by the BBC reach both the urban and rural portions of the population.** The majority of listeners (77%) are in rural areas, while 23% are in rural areas, matching the Afghan Central Statistics Office estimate that the Afghan population overall is 78% rural and 22% urban. The audience is made of up of roughly equal numbers of men and women, and attracts listeners from all age and ethnic groups.

I listen because BBC radio broadcasts good and on time news, entertainment programs and the New Home New Life drama which includes all aspects of life in Afghanistan in rural and urban areas. [Female, Literate, 15-24, Housewife, Rural]

I listen to news programs in the morning and evening. I also listen to NHNL drama after news broadcasts. I listen to BBC radio twice or three times a day. I listen to NHNL drama, but if this drama reflected the living conditions of people in the cities more accurately it would be better as well. [Male, Non-literate, 25-34, Driver, Urban]

- The growth in the television market has been exponential in the past five years. Television continues to grow as an important medium in all Afghanistan, but it remains a more urban phenomenon with 89% of urban residents having access to a television in their household, but only 26% of rural residents having the same. Only 42% of Afghans have access to any form of electricity in the home, and that access is rarely on-demand twenty-four per day access.

We go to BBC and Azadi radio stations for breaking international news stories...we don't watch TV because we don't have one. [Female, Literate, 25-34, Teacher, Rural]

- **This growing divide in terms of access to media will be more apparent as electricity in urban areas becomes more regular** and economic gains allow urban residents broader access to media equipment.
- The variety of stations available has increased markedly, and **some stations are drawing praise not only for their entertainment programs, but also for their news offerings**. Tolo TV, Ariana TV, TV Lemar, and others are making their mark, but their reach remains limited by low ownership of televisions in rural households and severe electricity shortages nationwide ((see report for television use figures between rural and urban audiences). Qualitative depth interviews with urban and rural residents in Kabul, Balkh, Nangarhar, and Herat support the findings from the surveys about issues related to access to television, and while it offers new and tantalizing options such as images direct from the scene of an event, it remains limited by economic access and electricity shortages; factors that impact ownership and use of radio less significantly.

TV is good for news programs because through TV we can watch pictures and video clips of news; when I watch clips and pictures through TV I feel that I am present in the event area. [Still], most of our countrymen in all districts and villages of Afghanistan are using radio as a source of information and news; they do not even have access to TV due to lack of electricity and other special problems. [Male, Non-literate, 35-44, Shopkeeper, Urban]

The news program which is provided by BBC radio till 08:00 is one of my favourite programs and a source of fresh and exact news, but I also like the 18:30 report which is aired through TOLO TV on Thursday night. After the Taliban regime, lots of changes have emerged in terms of media. During the Taliban regime we were just listening to radio for getting information and news. Now we are able to get information through different sources like TV, internet and satellite. TV is one of the most important sources of information. During Taliban regime we were deprived of TV. Mostly I follow TV programs at nights and in my home because in other places it is almost impossible due to the lack of electricity during the day. [Male, Literate, 25-34, Student, Urban]

The Continued Importance of Radio

- The survey results and the information from the depth interviews continue to highlight the importance of radio in the lives of Afghans. Radio is a source not only of news, but also information that people need for the betterment of their lives.
- Afghans report that they generally listen to more radio than they did two years ago, partly as a consequence of the growing variety of international and domestic stations available inside Afghanistan today.

My listening to radio has increased compared to past years, because the number of radio stations has increased and different types of my favorite informational programs are aired through these radio channels as well. [Male, Literate, 35-44, Government employee, Urban]

- **Increased media variety, but radio choice in particular, in urban areas is further adding to the urban/rural divide.** People in rural areas listen to international radio stations more than domestic: 32% v 28% daily/most days, while in urban areas it is 40% domestic daily/most days v 18% for international radio stations. This reflects the growing variety of FM stations available in urban areas, and the true rural nature of Afghanistan. While BBC is the most listened to station in rural areas the private, commercial radio Arman is more popular in urban areas.
- International radio broadcasters, in particular the BBC, continue to play an important role in the lives Afghans, especially in rural areas where listeners have fewer options and less access to information. The depth interviews reveal that **the BBC remains an important source of not just news, but also information that Afghans are not able to access easily from other sources.**

Conclusions and Recommendations

- **The research suggests that the BBC continues to fill an important need for the Afghan population.**

58% of respondents agreed with the statement: “I learn things from the BBC I cannot learn other places” (14% disagreed – the remainder had no opinion).

The survey results and the qualitative research highlight the BBC is a broadly accessed source of objective, trustworthy information that, despite the growing variety of media options available in Afghanistan, continues to provide unique information in a format that has an impact on the lives of Afghans across all demographic categories.

Yes, I heard of BBC Radio station a long time ago because it is very popular. All people know and listen to because it is a good and instructive radio station. [I listen] because it has interesting, instructive, educational and entertaining programs. I like to have a radio all the time with me. [Female, Non-literate, 15-24, Housewife, Rural]

As I told you before, my favourite news programs are on Azadi and BBC radio because they are international stations. They provide interviews and information that you can't find anything at all like them on local radio stations. [Female, Non-literate, 35-44, Tailor, Rural]

- Overall, the research also shows that **there are new realities in Afghanistan that the BBC must address** if it is to retain its position as a leading source of news, and more importantly if it is to remain a relevant factor in the continued development of Afghanistan. The increase in use of television and the proliferation of new domestic and international stations that the BBC did not have to compete with a decade ago make the Afghan media environment more complex.

- Despite a general overall satisfaction with the BBC Afghanistan service and the mix of programmes there are indications from both the qualitative and quantitative research that increased competition from other sources and exposure to new formats means that **some people are open to developments or improvements to the BBC service.**
 - Suggestions from the depth interviews for improvement to the BBC include: airing short newscasts more often, and on an advertised and known schedule. Radio Azadi, the US-sponsored broadcaster that airs from 07:00 to 19:00 daily, has carved out a loyal audience following mostly by providing these kinds of news updates on regular intervals throughout the day. This is supported by the survey which found that 85% are interested in short news bulletins or updates throughout the day at regular, planned times throughout the day – skewed towards men and urban residents.
 - Some also suggested the inclusion of more music and entertainment programs, most likely in response to the growing number of FM entertainment channels available, such as the Afghan domestic station Radio Arman.
 - Increasing the coverage of social issues and discussion of items that impact daily life, in particular programmes dealing with health, women’s and children’s issues (primarily in female respondents), would be welcome because of the high level of trust listeners place in the information provided the BBC. Female respondents in the survey and depth interviews expressed greater needs for basic information than male listeners, reflecting the continued closed nature of Afghan society that keeps many inside the home with limited exposure to education opportunities, or even social opportunities where information might be gathered outside the family structure.
 - Expansion of BBC to TV services in the future was mentioned by many respondents. While access to TV is limited, interest in TV is very high and Afghans place significant value on seeing images of the news in addition to hearing the information. Deutsche Welle previously sponsored a very popular television newscast that was rebroadcast on the Afghan state channel RTA, but it closed after Deutsche Welle could not continue to fund the program. Voice of America has introduced VOA Ashna TV, which provides a one-hour newscast rebroadcast daily on RTA in the evening (30 minutes in Dari, and 30 minutes in Pashto).
- The differences between the urban and rural audiences will continue to grow as the sharp differences in the economic status and access to information sources evolve in the coming years. The BBC should continue to monitor this situation in the future so that programming continues to reflect the realities and complexities of life in both urban and rural areas of Afghanistan. **Urban listeners, with a broader variety of media options open to them, are increasingly able to find local programming reflective of their own environment and experiences.**

- As more and more media enter the Afghan market, the **BBC will need to distinguish itself by providing context and background to news and other programming that more fully examine the complexities of Afghan life in rural and urban locations that other media, in particular domestic media, will lack the resources and expertise to provide.**

I listen to BBC because it gives information about hot issues in our country and the world in general. It has literature, music and cultural programs. It brings us things that Arman, Tolo, and Ariana do not. [Female, Literate, 25-34, Teacher, Urban]

- Television has yet to seriously dent the use of radio due to access and electricity problems, but the research shows a clear interest and desire to receive both news and entertainment from television. **BBC will increasingly face competition from domestic and international television providers in the future.** It is a force that will need to be reckoned with as it continues to reach more and more Afghans.

BBC Trust: Afghan Media Survey
December 2007/January 2008
Analytical Report by ACSOR Surveys and D3 Systems

Research Methodology

The survey was conducted by D3 Systems and ACSOR-Surveys in Afghanistan. The project was designed to provide a national sample of Afghan adults age 15 and older from all 34 provinces of Afghanistan. Fieldwork was conducted from December 29, 2007 to January 5, 2008, and 1,140 Afghan adults were interviewed.

A systematic sampling method with a multi-stage random stratified selection procedure was utilized with interviews distributed proportionally by population of province. Interviews were conducted in both urban and rural locations.

The sample is divided at the outset with half the sampling points designated for male interviews, half for female interviews. Male respondents were interviewed only by male interviewers, female respondents only by female interviewers due to the cultural restrictions in Afghanistan. ACSOR maintains a field team with both male and female interviewers to be able to meet this particular challenge.

Households were selected using a random route technique with interviewers starting from assigned locations then visiting homes at a set interval. Respondents were selected using a Kish grid to further randomize the survey process. Interviews are clustered into groups of 10 interviews per sampling point. In order to reduce the design effect due to clustering, where randomly drawn male/female sampling points fell within close proximity to each other in districts with small population sizes, the number of sampling points was doubled, also by random selection, and the number of interviews per point was halved, from 10 to five.

In total, 1,381 households were visited. Non-contacts represent 154 persons (11% of total contacts), refusals 87 persons (6%), yielding the total realized sample of 1140 (83% of all contacts).

Demographic Data

Gender and Age

The sample was divided from the beginning to provide a 50/50 male and female distribution. The age distribution in the sample reflects the young nature of the population with 63% of respondents reporting to be age 34 or younger. Relatively few respondents report being age 55 or older (6%). While there has not been a formal census in Afghanistan in several decades, estimates from the United Nations and the Afghan Central Statistics Office suggest average life expectancy is low and that the population tends to be younger in general.

Education Level

Fifty-seven percent of the respondents report having no formal education. Females are more likely than males to not have formal education (71% compared to 44%).

Urban and Rural Populations

The majority of Afghans live in rural environments and this survey reflects that reality, with 78% of respondents living in rural environments and 22% in urban environments. The sample represents a broad cross section of urban and rural environments, from apartment housing to remote villages accessed by dirt or foot paths instead of roads.

Employment Status

Afghanistan has high levels of unemployment. Only 40% of respondents report being employed. However, this figure is skewed due to the fact that the majority of women in the sample reported being either housewives or students (88%). Seventy-one percent of the men in the survey report working, while 11% of women report working.

Ethnicity

The sample was proportional to population by province and region. There is no census data on ethnic distributions, but the reported ethnicities in this survey are similar to those reported in similarly conducted surveys of Afghanistan. Overall, 37% of respondents reported to be Pashtuns, 42% Tajiks, 7% Uzbeks, 8% Hazaras, and 6% other ethnicities.

General Media Habits

It is important for the vast majority of Afghans (92%) to stay informed about current events in Afghanistan, with 58% reporting “very important”. The survey results and qualitative research show that the BBC is an important part the media landscape used by Afghans to stay informed about events both in and outside Afghanistan.

Access to Media Equipment

Radio remains the most significant medium in Afghanistan, with 86% of respondents reporting they have a working radio in their home, while only 40% claim to have a television in their home (95% claim to have access to a working radio and 61% have access to a television).

Thirty percent of Afghans reported having a mobile phone in their home. Internet access remains very low. Almost no respondents in the survey reported having access at home and only 2% reported any kind of access to the Internet. Forty-two percent of Afghans have access to any form of electricity in the home.

There are differences between urban and rural Afghans. While almost equal numbers of urban and rural Afghans claim to have a radio in their home (89% and 85% respectively), the case is not the same for television. Eighty-nine percent of urban respondents report having a television in their home, while 26% in rural environments do so. Overall, urban respondents are more likely to have in their home a television, cable connection, mobile phone, PC or laptop, a generator, a car, and electricity, compared to their rural counterparts.

Use of Radio and Television

The majority of Afghans have listened to the radio in the last month (88%), while less than half (47%) report having watched television. Only 13% of all respondents have read a newspaper or magazine in the last month.

Radio use is the same for urban and rural respondents; however, urban respondents are more likely to have watched television in the last month (93%) compared to 34% of rural respondents. However, the percent of television watching is increasing among both environments. In the January 2007 survey for Research and Learning at the BBC World Service Trust, 27% of rural respondents used television in comparison to 80% of urban residents.

In both this recent survey and previous surveys, urban respondents were also more likely to read a newspaper or magazine or access the internet. Men were more likely to read a newspaper or magazine compared to females. However, print media use is very low overall in Afghanistan in part because of the expense and also in part due to high illiteracy rates.

In the current survey, when asked to compare to two years ago, 60% of Afghans indicated they are listening to the radio more often (the rate was higher among males than females). Thirty-eight percent said they are watching TV programs more often and only 6% indicated they are reading newspapers or magazines more often.

With the exception of seeing an increase in the number of Afghans with access to and using television since 2002, the trends in radio access and use appear to remain consistent, for now despite the growing popularity of television. It means rather than replacing radio with television, Afghans are for the moment adding television to the mix of media they use without abandoning other sources.

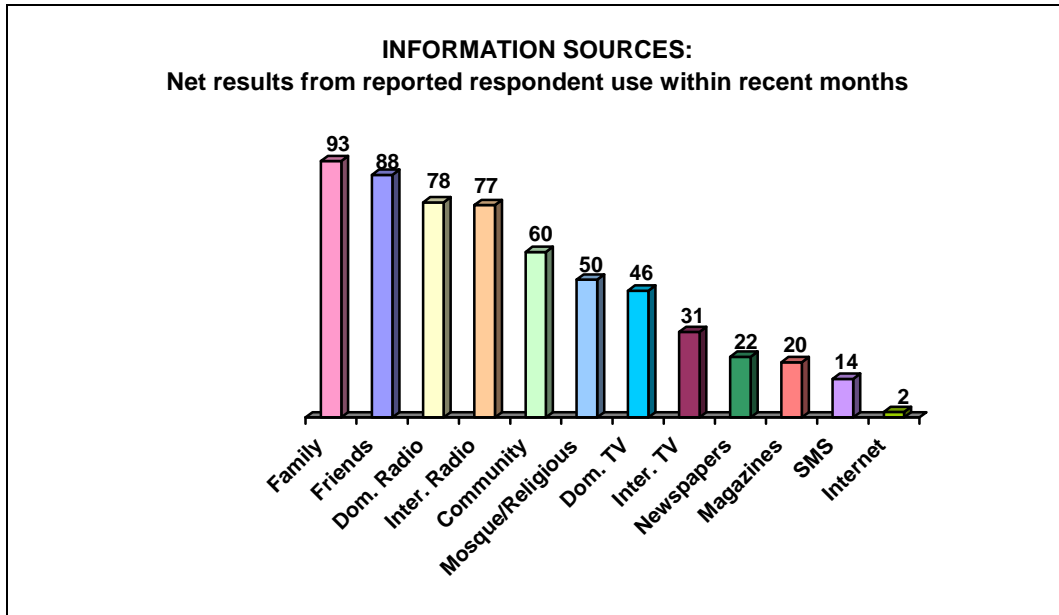
Information Sources

Afghans get information from different sources. The respondents in the survey cite family as their primary sources of news and current events, followed by friends or colleagues, radio (domestic and international), meetings in the community, and meetings at their mosque or sermons from religious leaders. The Internet, SMS and printed materials are the least common sources. There are some differences in which sources Afghans use for information. Urban respondents are more likely to use television, newspapers, SMS, and meetings in the community compared to rural respondents. Rural respondents are more likely to get their information at their mosque or sermons from religious leaders compared to urban respondents. There were no differences between urban and rural respondents in terms of the proportion getting their information from family and friends.

When comparing radio and television as sources of information, the trend is that although radio continues to dominate the media landscape, TV as a source of information is increasing among Afghans.

When asked about how much time they spend on an average day following the news on various sources, 28% spend less than 15 minutes, 44% spend between 16-60 minutes, and 22% spend more than one hour. Males tend to spend more time following the news than females. People in rural areas listen to international radio stations more than domestic

(daily/most days) 32% v 28%, while in urban areas it is 40% domestic daily/most days v 18% international radio stations. This reflects the growing variety of FM stations available in local markets, and the true rural nature of Afghanistan. Many parts of the country are not served well by FM, so MW and SW broadcasting are the most accessible in rural areas. International stations are more likely to be on MW and SW frequencies that can reach these rural areas than domestic Afghan stations.

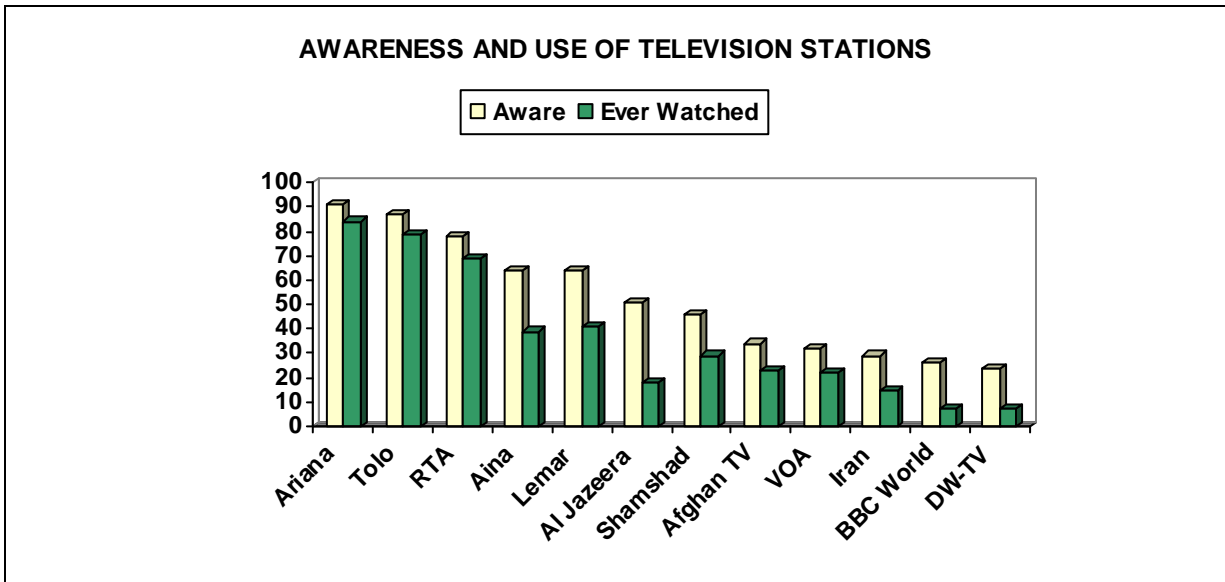


Base: Total Sample (1140)

Television Use

The top five stations that Afghans are aware of are: Ariana TV, Tolo TV, RTA (TV Afghanistan), Aina TV, and Lemar TV. Approximately 26% of Afghans are aware of BBC World. The top three stations that Afghans have watched are Ariana TV, Tolo TV, and RTA. The station watched most often by TV viewers is Tolo TV 39% followed by Ariana 22%. 7% of Afghans have watched BBC World. Almost all viewers of BBC World were also listeners to the BBC radio service as well.

Urban respondents are more likely than rural respondents to watch the following stations: Ariana, Tolo, Lamar, Aina, Shamshad, Afghan TV, VOA, Al Jazeera, and BBC World. Rural respondents are more likely to have watched Iran TV compared to urban respondents.



Base: All who have ever watched TV (629) Figures above report total awareness of stations and if the respondent has ever watched the station before. The chart represents stations that had over 10% ever watched.

Radio Use

Radio listeners, that is those who ever use radio, in Afghanistan tend to listen to the radio using short wave (55%), 52% use FM, and 46% use medium wave (AM). Sixteen percent were not sure of which waveband they listen on.

Rural listeners were more likely to use short, medium, and long wave compared to urban listeners; and urban listeners were more likely to use FM or VHF. Urban areas are more likely to have FM stations, whereas the geography of much of rural Afghanistan makes FM broadcasting less accessible in rural areas. These findings are consistent with what was found in previous BBC surveys. Although since October 2007 when the last survey was conducted to this recent survey in January 2008, short wave use has dropped by about 10%.

Most Afghans listen to the radio at home (88%), while 30% listen at a friend's or neighbor's home. Twelve percent listen at work and 10% while in the car. Men were more likely than women to listen at work and in their car. Urban listeners were more likely to listen in the car compared to rural listeners, while rural listeners were more likely to listen at a friend or neighbor's home compared to urban listeners.

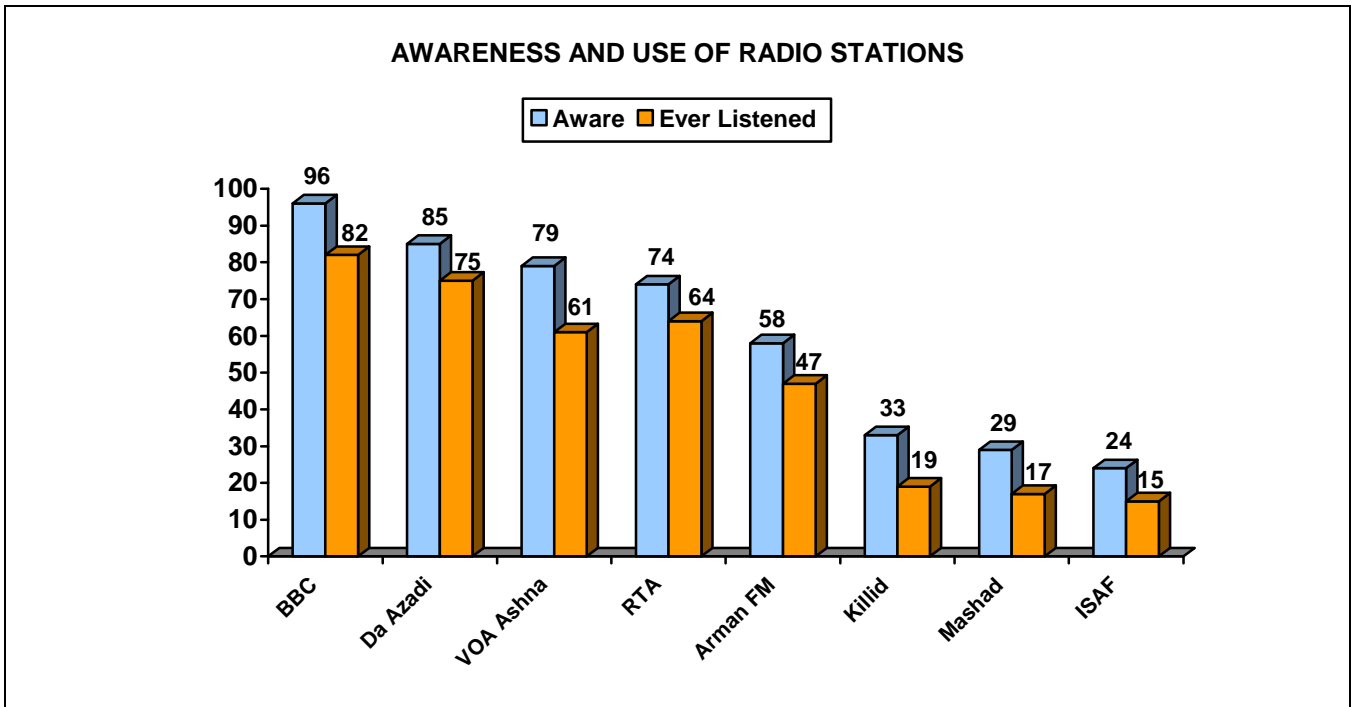
There are three blocks during the day in which more than 25% of all radio listeners are listening to the radio: (1) 7:00 am to 9:59 am; (2) 1:00 pm to 2:59 pm; and (3) 7:00 pm to 8:59 pm. There are some differences between urban and rural listeners. It appears that there is more urban listening through the morning as people may have access in cars and at work. Rural listening is higher than urban later in the day as television provides more competition.

Awareness and Use of BBC Radio Programs

The BBC has considerable recognition in Afghanistan; 96% of those who have listened to radio have heard of a BBC radio station and 82% have actually listened to a BBC program. Of those who have listened to a BBC program (864), 75% listened to the program in the last week and 84% listened in the last month. BBC radio use has remained over the past few years high, and it is among the most often used stations in Afghanistan.

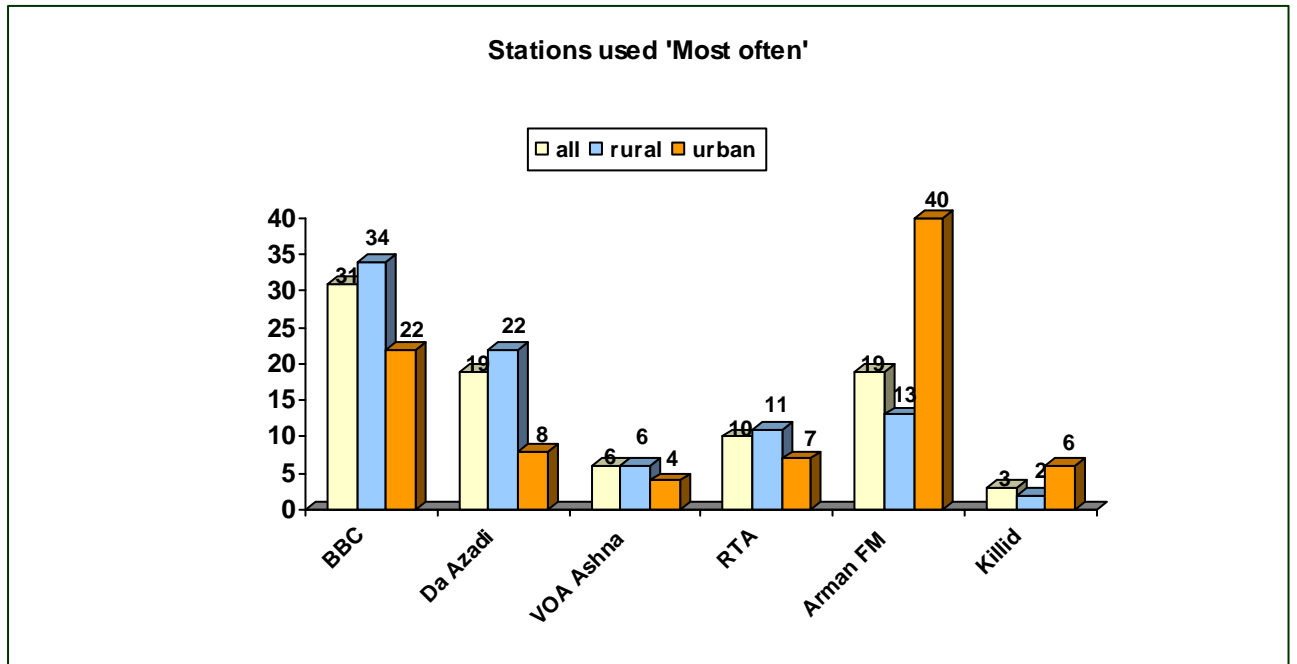
The BBC is among the most used stations in Afghanistan, with higher listenership than Da Azadi and RTA, the state sponsored station. Other stations such as Voice of America’s “Ashna” and Arman also attract large audiences. Local Afghan stations, broadcasting mostly on FM are drawing larger audiences from urban areas where their broadcast footprints are most significant.

Urban listeners are more likely than rural listeners to listen to RTA, Arman, Killid, and ISAF. BBC Radio and other international stations also gain higher listening levels in rural areas. Males are more likely to listen to VOA, Da Azadi, and ISAF than females.



Base: All who have ever listened to the radio (1048)

When asked which stations they listen to ‘most often’ the market positions become clearer. Radio Arman, a private commercial station playing a mix of news and music is extremely popular in urban areas with the BBC in second position. Rural listeners are more likely to listen to the BBC.



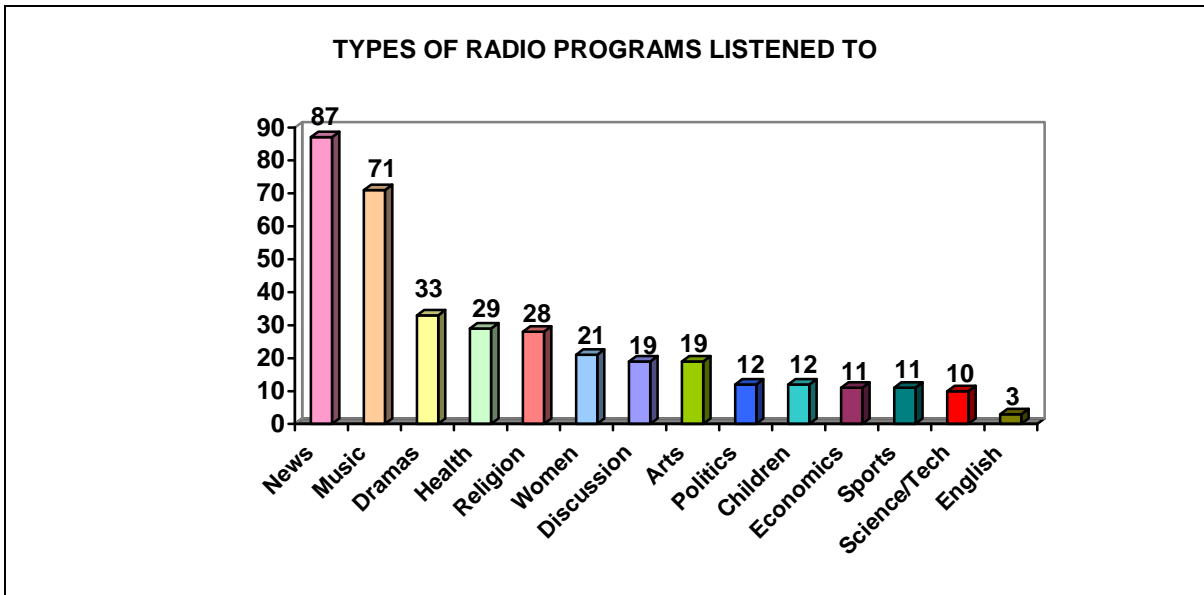
Base: All who have ever listened to the radio (1048)

Almost half of all who have listened to radio (49%) have heard a BBC program or bulletin broadcast on another station in Afghanistan. Thirty-four percent have heard a VOA program and 42% have heard a Radio Azadi program broadcast on another station in Afghanistan.

Types of Programs Listened to

The vast majority of Afghans listen to the radio for news programs (87%) followed by music (71%). 33% listen for radio dramas (although listening to the drama/soap *New Home New Life* was much higher when prompted – see later in the report), 29% listen to programs about health issues and 28% listen to programs related to religion and faith.

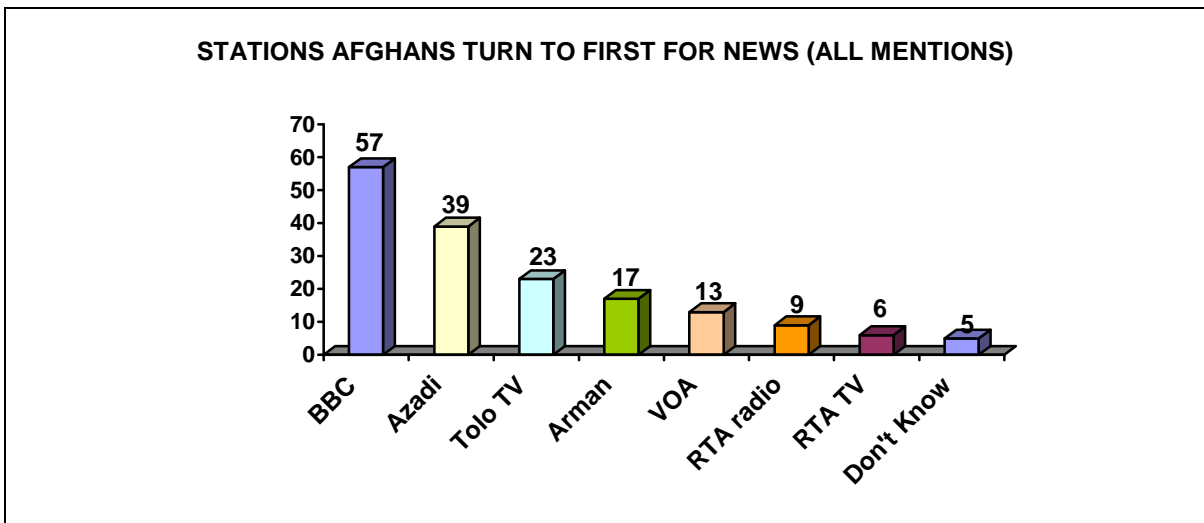
There are differences between what males and females prefer to listen to. Males are more likely to listen to programs related to news, science and technology, political issues and sports – although apart from news none of these areas were mentioned by more than 20% of men. Females are more likely to listen to music (77%) and programs for women (35%). There were no significant differences between the types of programs that urban and rural listeners prefer. The table below highlights responses to the question: “When you listen to the radio what types of programs do you generally listen to?”



Base: All who have ever listened to the radio (1048)

Image of News Programs

When provided with a list of eight television or radio stations, 43% of Afghans report that they turn first to the BBC for news, followed by Radio Azadi and Tolo TV. Respondents were asked about their first and second choice, and combined, 57% of Afghans report that they would turn to BBC first for news. Among urban respondents, however, Tolo TV is mentioned before BBC radio, and Radio Arman is the third most popular choice. For rural respondents the top stations were the BBC and Radio Azadi.



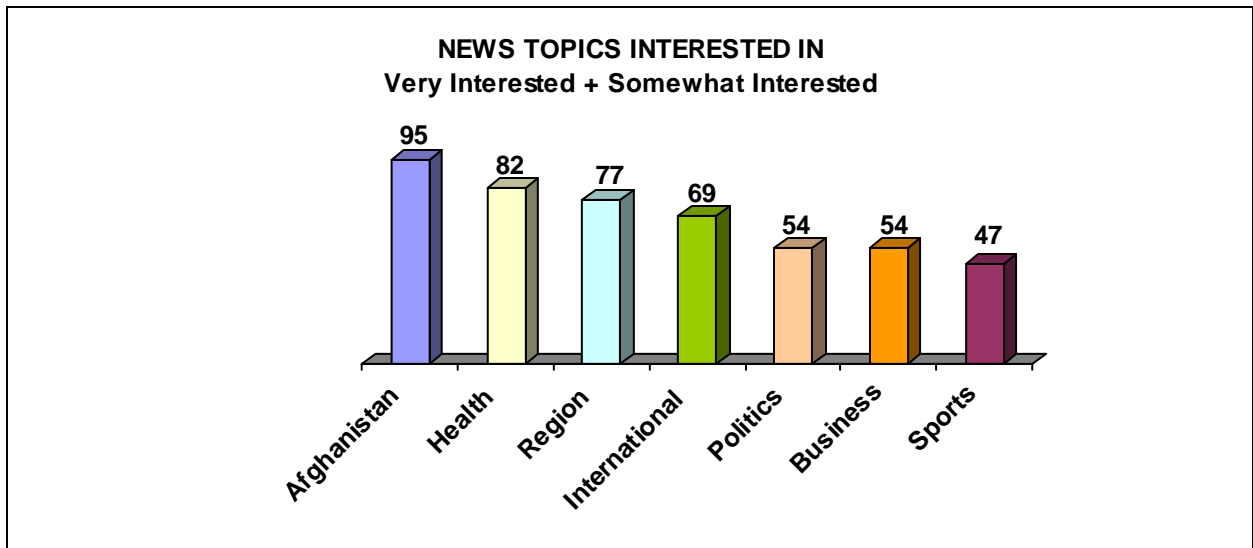
Base: 1140 – Which station would you turn to first for news?

News Topics of Interest

Afghans are interested in various types of news programs. Mostly, they are interested in news about Afghanistan followed by news about health and health care, and news about the region (countries near Afghanistan). Less than half of Afghans are interested in

sports news. News about Afghanistan is of the greatest interest: 72% said they are ‘very interested’ in this.

A similar proportion of males and females are interested in news about Afghanistan and news about health and health care; however males are more likely to be interested in all other news topics compared to females (that is, region, international, politics, business, and sports).

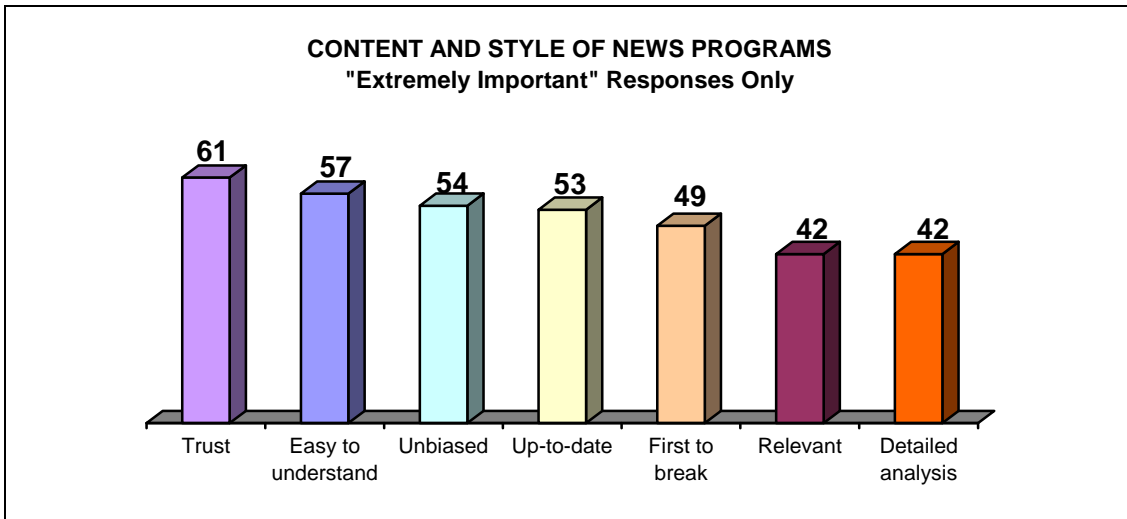


Base: Total Sample (1140) I would like to know how interested you are in news about...?

Content and Style of News Programs

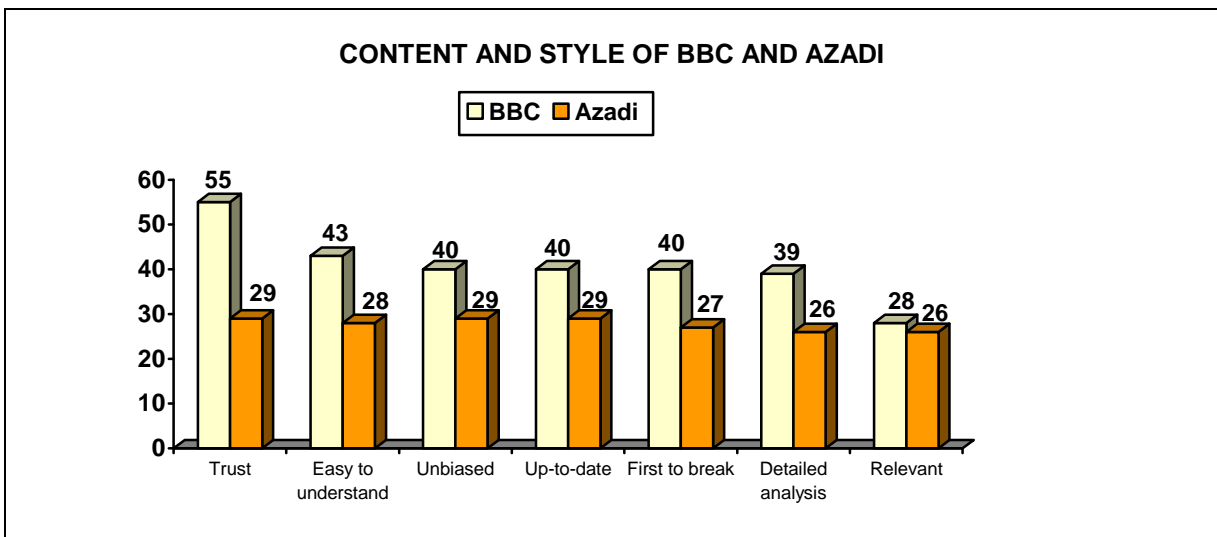
For the majority of Afghans, the content and style of news programs is important. Specifically, that news be from a source they can trust, that it be easy to understand, up-to-date, and unbiased and objective. Seventy-seven percent consider it important that a program be the first to break the news and 69% feel it is important that programs provide detailed analysis of news events.

Urban respondents generally placed more importance on all features but were more likely than rural respondents to consider the following particular aspects of content and style as important: providing news that is relevant to them, up-to-date and first to break the news. Males were more likely than females to find it important that programs provide detailed analysis of news events.



Base: Total Sample (1140) "Thinking about the content and style of news programmes in general, how important, if at all, are the following characteristics?"

Respondents were presented with a list of seven providers (radio and TV) and asked about the same aspects of content and style discussed above. The BBC was consistently rated highest in all areas, followed by Radio Azadi. Over half of Afghans feel that the BBC is a source they can trust and 43% feel it is easy to understand. One important stand out is that among urban residents, TV Tolo scores higher than BBC for being relevant, unbiased, and up-to-date. BBC scores higher among urban residents for trustworthiness, and detailed analysis and is just ahead on 'first to break news'. Both score the same on, 'being easy to understand'.



Base: Total Sample (1140) "Please tell me to which providers do you think these characteristics apply the most?"

Types of News Programs Available

Respondents were asked about their interest in seven different types of programs that are available on radio and television:

- 91% are interested in news programs with news about Afghanistan and international news with analysis of the news.
- 85% are interested in short news bulletins or updates throughout the day at regular, planned times throughout the day.
- 71% are interested in longer analysis that explains the background to the news and current issues.
- 70% are interested in phone-in programs where listeners like themselves can ask questions and discuss issues.
- 68% are interested in interviews with important people/figures in Afghanistan.
- 65% are interested in discussion programs with important people/figures in Afghanistan.

Men were more interested in all seven types of programs at higher rates than females.

Urban respondents were more likely to be interested in short news bulletins and updates compared to rural respondents, They were also more interested in interviews and there was a more enthusiastic core of people ‘very interested’ in phone ins. This all reflects the greater variety of programming available to people in urban areas.

Discussing News with Others

Thirty-seven percent of Afghans report they often discuss news about other countries with other people and 36% indicated “rarely” or “never.” Males were more likely than females to discuss news with others, and urban respondents were more likely than rural respondents to discuss news with others.

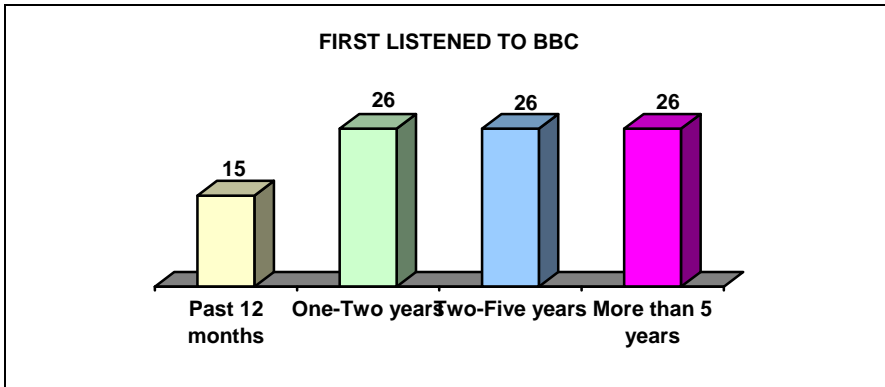
Half of Afghans feel they would be able to provide “some” or “a great deal” of news about other countries to others and 45% indicated they would be able to provide “not very much” or “nothing at all.” Men were more likely than females to feel able to provide information on news about other countries to others.

Opinions of BBC Listeners/Viewers

Eighty-nine percent of Afghans who have ever used BBC radio or TV (866) indicated they will continue to use the BBC in the future. Over three-quarters (76%) say they will recommend the BBC to others. Ninety-percent of BBC listeners feel they can trust the information provided by the BBC. Males were more likely than females to agree with these statements.

First Listened to BBC

About a quarter of BBC listeners (26%) first started listening to the BBC between one and two years ago, another 26% started listening two to five years ago, and another 26% started listening more than five years ago. Females were more likely to indicate they started listening one to two years ago and males were more likely to indicate they started listening more than five years ago. It is important to note that Afghanistan has a young population, which influences this figure of recent use, but there is also expanded access to BBC through FM and MW broadcasting in Afghanistan.



Base: All who ever listened to BBC radio or TV (866)

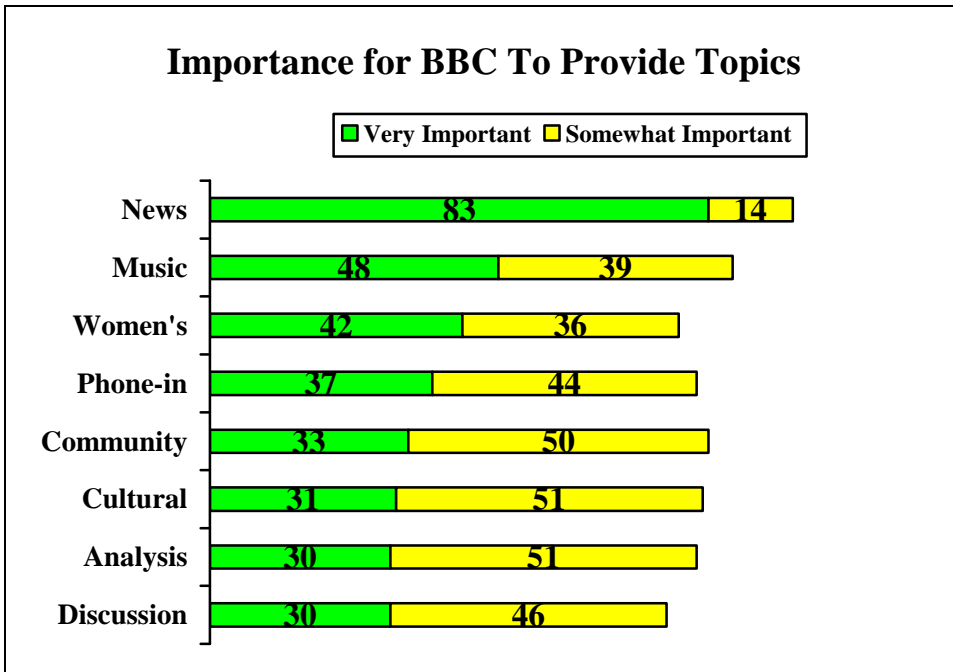
BBC Program Topics

The program topics that Afghans consider the most important are news and music; however, all other topic areas were important to the majority of BBC listeners.

There were some differences between males/females and urban/rural for some programs. Males were more likely to find news, analysis, cultural programs, community programs, discussion and phone-in programs more important compared to females; while more females indicated women's programs and programs covering social issues were important. 60% of women said women's programmes were very important and 90% thought they were important in total.

Urban listeners were more likely to find cultural programs and community programs more important compared to rural listeners. In addition to this broader discussion of topics, special programs prepared by the BBC, such as *New Home*, *New Life*, remain very popular across demographic groups.

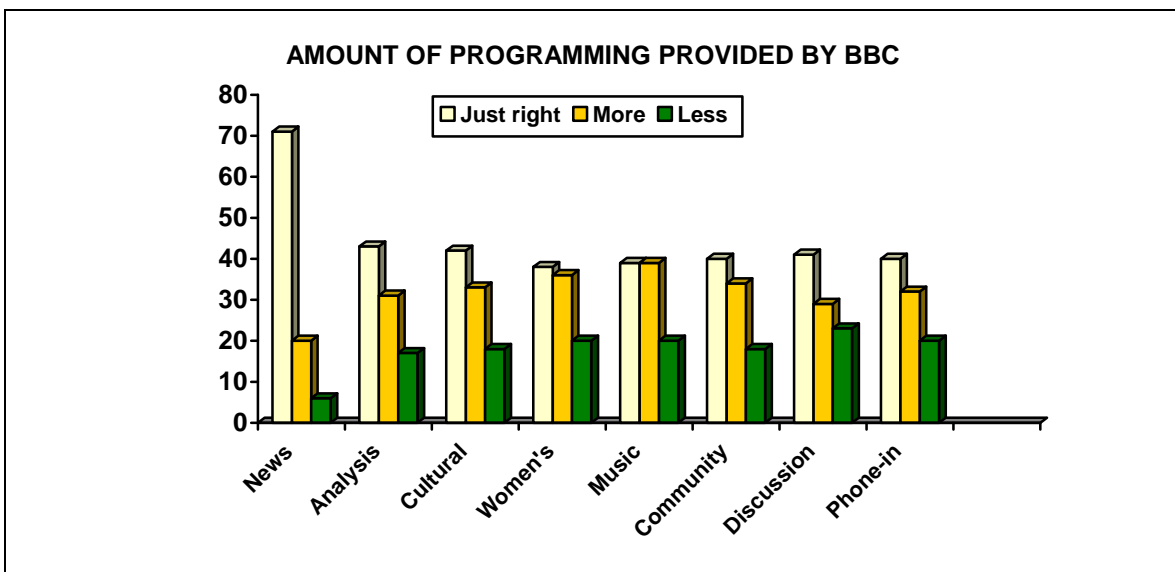
At the end of the day though, news is what continues to draw the majority of listeners to the BBC. This is an increasingly difficult niche to defend with the rise of competition from both international and domestic broadcasters, but the BBC has so far managed to hold strong position for both news and other programming.



Base: All who ever listened to BBC radio or TV (866) “How important is it to you that BBC provide the following kinds of programs?”

Amount of Programming Provided by BBC

Seventy-one percent of BBC listeners feel the amount of news provided by BBC is just right. Most listeners feel the amount of analysis, cultural programs, discussion and phone-in programs provided by the BBC are just right. Listeners are somewhat split when it comes to women’s programs, community programs and music, with an equal proportion indicating the amount is “just right” and there should be “more.”



Base: All who ever listened to BBC radio or TV (866)

When asked specifically about the news and analysis, 56% of BBC listeners feel there should be more news about Afghanistan and 29% indicated the balance is just right. There is an increased desire to hear more news about what is happening in different parts of Afghanistan.

BBC Radio Listenership

Thirty-eight percent of BBC listeners report their BBC listening has increased in the last 12 months, 25% indicated it has decreased in the last 12 months, and 34% indicate it has stayed the same in the last 12 months – so there is a net claimed increase which is in line with the survey findings. The increase has been more marked in rural areas while the numbers listening less in urban areas cancel out those listening more.

For those whose BBC radio listening has decreased, the main reasons reported were:

- Lack of time (34%),
- More choice on other radio stations (29%). This was reported more often by men and rural respondents who are just starting to get access to the variety that has been available to urban listeners for the past few years.
- Watch the news on TV (22%). This was reported more often by women and urban respondents.

BBC Radio Language

The majority of BBC radio listeners listen in Dari (72%) and 50% in Pashto. Very few listen in Uzbek or English (5% and 4% respectively). Regardless of language however, most tend to tune in for news and music and drama.

BBC Radio Programs

For listeners, whether in Dari or Pashto the most listened to news programme is the morning news programme *Dawn*. Of the non-news programmes the most commonly listened to radio programme is *New Home New Life*. The Friday interactive (phone-in) music programme is also very popular. For women, *Afghan Woman's Hour* is one of the most listened to programmes.

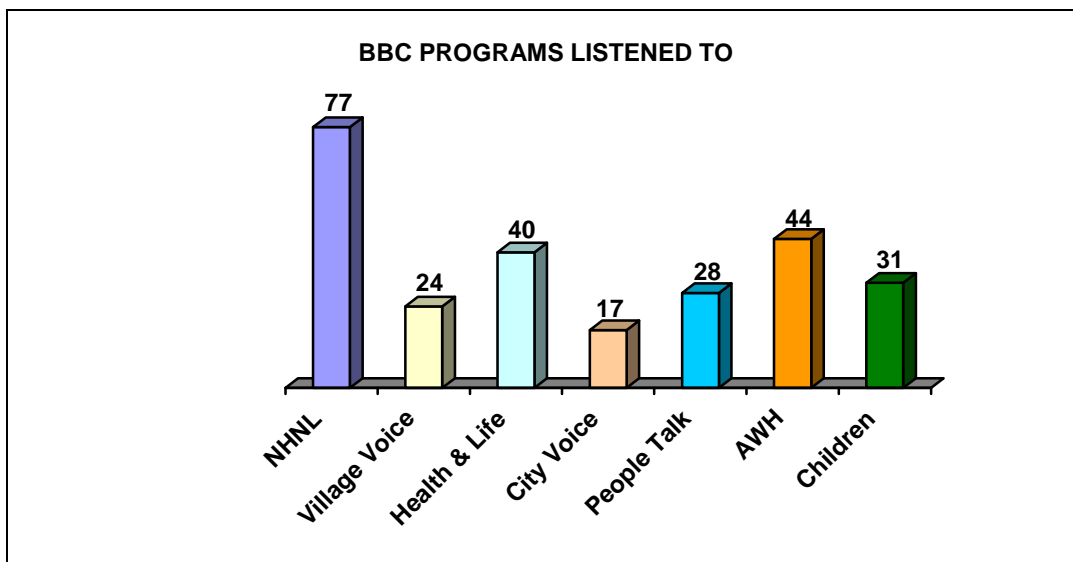
It is notable that the Friday music interactive phone-in programme has a high level of awareness and has a high claimed listenership reaching more people than the morning news programme in a week. However as the news programme is listened to the most often this suggests that it is a regular part of people's routine and listened to regularly while the interactive music programme is an appointment to listen programme.

There is a marked interest amongst younger people to the music programme, however caution should be taken in attempting to compete with local FM stations in providing music in urban areas. Rural listeners, especially younger rural listeners, may indeed be interested in more music programming.

There was some lack of awareness of programmes. Only the Interactive music programme, the morning news block and Women's Hour have more than 50% recognition when prompted amongst BBC Dari listeners for instance.

Of the non-news programmes *Health & Life* are also popular among listeners. *City Voice*, *Village Voice* and *People Talk* have smaller audiences. Approximately one-third have listened to special programs for children. Urban respondents were more likely to have listened to *City Voice* and children’s programs compared to rural respondents.

The chart below indicates the broad popularity of *New Home*, *New Life*. However, the increasing number of entertainment options available from other radio stations, television, and recorded music and video programs from India, Pakistan, and other countries available for purchase in markets across Afghanistan, will create pressure for the BBC to remain aware of changing tastes and preferences among Afghans if the programs like *NHNL* want to maintain their audiences in the future. A comparison with Afghanistan’s BBC Audience survey that was conducted in 2006 reveals that listenership of all BBC programs has increased according to the results of this most recent survey, an indication that as media access continues to expand for all Afghans, they continue to keep the BBC as part of their overall media consumption regime.



Base: All who have ever listened to the radio (1048)

Statements about BBC Radio

Radio listeners were presented with the following eight statements about BBC radio:

- I do not really know what time the BBC news is broadcast (46% agree). Women and urban listeners were more likely to agree.
- I listen mainly to hear BBC news programs (55%). Men were more likely to agree.
- I listen to BBC mainly to hear music (52%)
- I listen to BBC mainly for drama programs (55%)
- I trust the BBC news more than news from other radio or TV stations (62%). Men were more likely to agree.

- When I turn on BBC, I usually do not know what kind of program will be on (41%)
- I learn things from the BBC I cannot learn other places (58%)
- Other stations provide news and information that is as good as the BBC in Afghanistan these days (53%). Men and urban listeners were more likely to agree.
- These statements confirm the findings of other questions - that people are not aware of the programme schedule, and that news music and drama are key reasons to tune in. The service is highly valued but there is increasing competition which is also valued.

Statements about Themselves as News Consumers

Radio listeners were presented with the following eight statements about themselves as news consumers:

- I am interested in hearing different points of view on major stories in the news (86% agree)
- Gaining knowledge and becoming better informed is a priority to me (80%). Urban listeners were more likely to agree compared to rural listeners.
- I want to improve my position in life (77%)
- I actively seek to understand current events in the world (73%)
- I like to understand more about the background to current events (75%)
- I trust foreign broadcasters more than broadcasters from my own country (55%)
- I think it is important to have access to foreign news and information providers (65%)
- I need to hear news as soon as it happens (77%)

Men were more likely than females to agree with all eight statements.

PART III. Depth Interviews in Kabul, Balkh, Nangarhar, and Herat

D3 and ACSOR conducted forty-eight depth interviews with urban and rural residents of Kabul, Nangarhar, Herat, and Balkh provinces. The interviews with both male and female, literate and illiterate, as well as both Dari and Pashto speakers.

Summary of Qualitative Interviews:

1. The depth interviews reinforce the survey findings. Radio is the most widely used source of media among the respondents, followed by television and magazines. The least popular sources included newspapers and the internet. Most participants listen to the radio primarily at home with family members.
2. Participants in the depth interviews believe there have been significant changes within the past two years in media in the forms of increased program options, new channels, freedom of press, and an increased desire among Afghans to be aware of current events in Afghanistan. Television and radio are both used more now by the participants than they were in the past, but print media and the internet remain uncommon among most of the participants in the depth interviews. Although the radio is currently the most dominant media source, particularly for obtaining uncensored and relevant news, the television has increasing usage and influence among Afghans, especially in urban areas. More urban Afghans are turning to the television, foremost for entertainment, but some of the respondents noted that they now prefer the television to the radio for news. Use of television is strongly hampered by the lack of radio.

As we are in the midst of the reconstruction progress in Afghanistan, so everything changes in a positive way; positive changes have come to me by using media. I hear about things happening in our country and it gives me information I need. [Male, Literate, 35-44, Government employee, Urban]

Our consumption of specific media sources has changed in general. As you know in the few past years, radio was the only source of information and people learned about their news through radio, but fortunately now, there are different TV and radio stations. In addition, some people who have access to internet use that to learn about their news. Also still most of our people have access only to radio. [Female, Literate, 15-24, Employee of Human Rights Society, Rural]

3. The most popular radio station in general and for the news, is the BBC followed by Arman and Azadi. The most popular TV channel for both is Tolo followed by Ariana. For large national and international news stories, Afghans turn primarily to Tolo, BBC, Azadi, or Ashna.

I think radio BBC has gained enough trust of our people in past years. This is because they have professional presenters who present exact and interesting news and other types of informational programs. [Male, 25-34, Literate, Student, Urban]

BBC radio broadcast exact news on time without any kind of bias and partiality which increase its trust among audience. [Male, 35-44, Literate, Teacher, Rural]

When I am listening to BBC news program then I get ready for fresh news about Afghanistan and all over the world. BBC reflects facts related to our country and all over the world it is an experienced radio channel to which our father and grandfather were interested. BBC radio covers different types of programs such as political, news, related to health, educational, entertaining, family dramas and music programs. News program of radio BBC are better than other news programs because it is prepared from trustful resources and is presented with a good style. [Male, Non-literate, 25-34, Shopkeeper, Rural]

4. Topic-wise, most respondents are interested in current events related to Afghanistan and its surrounding countries regardless of municipality or gender. Most effective means are through news analysis, interviews with important people, and phone-in programs.
5. Most of the respondents in the depth interviews listen to BBC radio on a fairly regular basis, due to its news and entertainment programs. More than half of the respondents prefer the news to any other programs on the radio or the television. All participants are familiar to the types of programmes—news, political, educational, entertaining, informational, health-related, and children-oriented—broadcasted by BBC.

We listen to BBC radio station that is because it is relevant to Afghans and they always have a good response to our suggestions and questions. I would like to listen to news from the BBC in the future as well. [Female, Literate, 15-24, University student, Rural]

When I listen to news from BBC, the term breaking news comes to my mind. I am proud to be one of BBC Radio's listeners. [Female, Literate, 45-54, Housewife, Urban]

6. Suggestions from the depth interviews for improvement of the BBC include:
 - Airing short newscasts more often, and on an advertised and known schedule
... BBC radio is in our own language...but if they arrange their news broadcasting as Azadi radio does every hour during the day, that would be much better and everybody will be able to listen to news from BBC. [Female, Literate, 15-24, Student, Urban]
 - Inclusion of more music and entertainment programs
 - Increase of programs dealing with health, women's and children's issues (primarily in female respondents)
 - Expansion of BBC to TV services

The suggestion to have more short newscasts comes partially from the introduction of Radio Azadi, sponsored by the US Radio Free Europe / Radio Liberty which has done very well with the introduction of its daytime programming format that has regular news updates throughout the hour.

The last suggestion on the list, to expand into TV services is coming mainly from the urban respondents who now have access to Voice of America Television in

Dari and Pashto. VOA (Ashna) TV rebroadcasts a 30 minute newscast every evening on Afghan State Television. The program is produced in Dari and Pashto.

Qualitative Research Methodology

Participants in the qualitative portion of the survey were recruited from among the randomly selected participants of survey projects in Afghanistan. ACSOR tried to recruit a broad cross section of urban, rural, male, female, old, young, educated, and uneducated users of media to participate in the depth interviews about the BBC.

The interviews were conducted by trained members of the ACSOR staff. The interviews were conducted in the homes of the respondents and each interview took from one to two hours to complete. Transcripts were made from the interviews and translated into English for analysis.

List of Research Participants in Depth Interviews

Balkh

1. Male, Literate, 35-44, Shopkeeper, Urban
2. Male, Non-literate, 25-34, Shopkeeper, Rural
3. Male, Literate, 35-44, Government employee, Urban,
4. Male, Literate, 25-34, Taxi driver, Urban
5. Male, Literate, 35-44, High school graduate, Urban
6. Female, Non-literate, 35-44, Urban
7. Female, Non-literate, 25-34, Housewife, Urban
8. Female, Non-literate, 45-54, Housewife, Rural
9. Female, Non-literate, 45-54, Housewife, Urban
10. Female, Literate, 15-24, Jobless, Urban

Herat

1. Male, Literate, 35-44, Free job, Rural
2. Female, Literate, Housewife, primary education, Urban
3. Female, Literate, 25-34, Teacher, Rural
4. Female, Literate, 15-24, Employee of Human Rights Society, Rural,
5. Female, Non-literate, 25-44, Housewife, Rural
6. Male, Literate, 15-24, Jobless, Urban
7. Male, Literate, 35-44, Shopkeeper, Urban
8. Male, Non-literate, 25-34, Driver, Rural
9. Male, Literate, 25-34, Employee at private business company, Urban
10. Female, Literate, 15-24, Employee at Human Rights Association, Urban

Nangarhar

1. Male, Literate, 15-24, Student, Urban
2. Male, Literate, 35-44, Teacher, Rural
3. Male, Non-literate, 35-44, Shopkeeper, Urban
4. Female, Literate, 15-24, University student, Rural
5. Female, Literate, 25-34, Teacher, Rural
6. Female, Literate, 15-24, Student, Urban
7. Female, Literate, 25-34, Journalist, Rural
8. Male, Literate, 35-44, Engineer, Rural
9. Male, Literate, 15-24, Driver, Urban
10. Female, Non-literate, 35-44, Tailor, Rural

Kabul

1. Male, Literate, 25-34, Student, Urban
2. Male, Literate, 15-24, Jobless, Urban
3. Male, Literate, 25-34, University student, Urban
4. Female, Literate, 45-54, Housewife, Urban
5. Male, Literate, 15-24, Jobless, Rural
6. Male, Literate, 35-34, Government employee, Urban
7. Female, Non-literate, 15-24, Housewife, Rural
8. Female, Literate, 25-34, Teacher, Urban,
9. Female, Literate, 15-24, Housewife, Rural
10. Male, Non-literate, 35-44, Driver, Rural
11. Male, Literate, 25-34, Student, Urban
12. Male, Literate, 35-44, Jobless, Urban
13. Female, Literate, 25-34, Teacher, Urban
14. Female, Literate, 15-24, University Student, Urban
15. Male, Non-literate, 25-34, Jobless, Urban
16. Male, Literate, 25-34, University Student, Urban
17. Male, Literate, 25-34, Director of Radio Watandar, Urban
18. Female, Literate, 15-24, Student, Urban