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Analysis of the activities of domestic TV channels in the media market

Abstract. *The article analyzes the activities, directions, projects in their broadcast schedule, and their place in the rating table of television channels registered in the Ministry of Information and Social Development of the Republic of Kazakhstan and operating in the domestic media market. Kantar («TNS Central Asia» LLP) has been monitoring and studying the rating of republican TV channels in the media market for 20 years. Based on the research provided by the company, domestic TV stations create a media plan and broadcast schedules. This is the only company monitoring the media market in Kazakhstan.*

Considering that the study of only one company is a biased opinion, the authors conducted a special survey among TV viewers. The Kantar company and the survey data were compared and the TV viewer demand was analyzed. The analysis also takes into account the place of residence, age, gender of the viewer. Based on the results of these studies, an analysis of the activities, content, and social media accounts of several Republican TV channels was carried out.

Keywords: *Mass media, internet media, TV channel, media market, rating, monitoring, social media.*

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Introduction

Based on the official data of the Ministry of Information and Social Development of Kazakhstan, 4873 mass media were registered in the country until August 2021. Of these, 3541 periodicals, 184 TV channels, 79 radio, 792 internet media (459 news agencies, 343 network publications). Of these mass media, 4606 are domestic media, and 267 are foreign media. In the table below the index of domestic mass media by

region is given. The majority of TV channels are located in Almaty city. Main republican channels are located in Astana city [1].

Main part

In order to make a comprehensive analysis of the activity of competitive TV channels in the media market, it is necessary to first identify the competitive channels in the market of the republic. It is measured by a special rating.

Table 1. Indicators of regionalization of domestic mass media

№	Region / city	Periodical print edition	Electronic Mass media	Internet media	Total
1	Astana city	507	33	164	704
2	Almaty city	1143	67	170	1380
3	Turkestan region, Shymkent city	428	21	180	629
4	Karagandy region	282	30	30	342
5	Almaty region	157	7	38	202
6	East Kazakhstan region	138	13	26	177
7	Kyzylorda region	141	8	26	175
8	Kostanay region	118	25	12	155
9	Pavlodar region	108	10	12	130
10	Zhambyl region	89	6	55	150
11	Akmola region	97	10	17	127
12	West Kazakhstan region	93	10	11	114
13	Aktobe region	76	8	15	99
14	Atyrau region	62	4	19	85
15	North Kazakhstan region	60	5	9	74
16	Mangystau region	42	6	18	66
	Total	3541	263	802	4606

(The table was taken from the official website of the Ministry of Information and Social Development)

Kantar («TNS Central Asia» LLP) monitors and studies the media market rating of republican TV channels in Kazakhstan. Among these channels there are twenty-six TV channels (as of 2022), such as «Qazaqstan», «Khabar», «КТК», «Eurasia», «Khabar24», «Astana», «Channel 7».

The Kantar research company has been conducting marketing research in the media market of Kazakhstan, Central Asia and the Caucasus for more than 20 years. These studies make it possible to identify competitive television channels in the Kazakhstan market, projects that

Table 2. Data of October 23, 2021 year

ТОП 10 ОСНОВНЫХ КАНАЛОВ			ТОП 10 ОСНОВНЫХ КАНАЛОВ Прайм-тайм		
1	КТК	19,60	19,80	КТК	1
2	QAZAQSTAN	14,90	17,50	QAZAQSTAN	2
3	НТК	11,80	13,50	НТК	3
4	ЕВРАЗИЯ	10,20	7,20	ЕВРАЗИЯ	4
5	31 КАНАЛ	6,40	7,00	АСТАНА	5
6	АСТАНА	6,00	6,60	7 КАНАЛ	6
7	МИР	5,50	5,50	31 КАНАЛ	7
8	7 КАНАЛ	5,00	4,60	МИР	8
9	ХАБАР	2,20	1,40	ХАБАР	9
10	ALMATY TV	1,50	0,70	ALMATY TV	10

are in demand by viewers. Research in the field of television is conducted within the framework of the «TV Index 100,000+» project. It aims to study the size of the audience of television channels, the characteristics of television viewers and their preferences. The results of the research are necessary for TV channel representatives to effectively plan broadcasts and develop broadcasting systems and advertising sales opportunities. «TV Index 100,000+» data – necessary «currency» for monetization in the advertising and media market.

So, it is relevant to mention the 10 best TV channels in Kazakhstan according to the Kantar research company. As you can see from the table below, KTK, Qazaqstan and NTK TV channels lead the transition both during the day and in prime time. This means that viewers in areas where the research company’s peplemeters (portable measurement devices) are installed mainly watch these three channels.

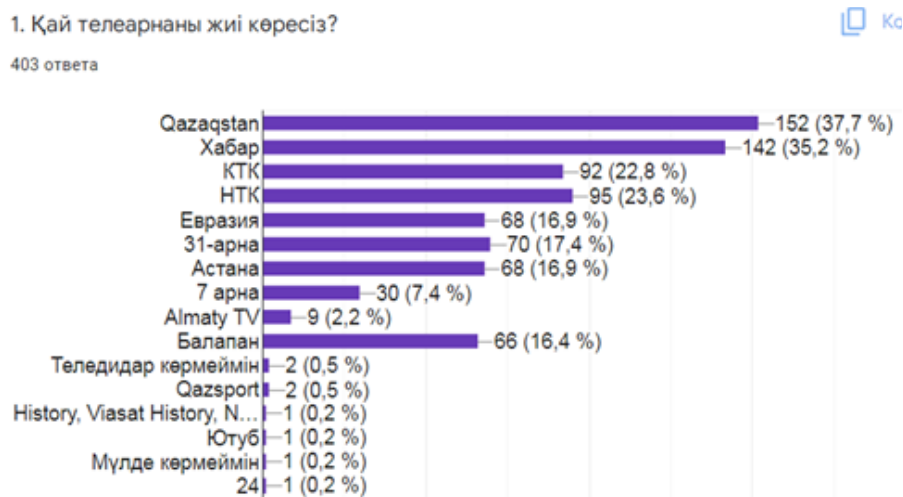
This is data from only one research company, that is, information from one source. The company’s portable measuring devices are installed in settlements with more than 100,000 inhabitants. That is, the opinion of the audience of settlements with less than one hundred thousand inhabitants is not taken into account. So that the results of our research are not biased, a survey was conducted among citizens who watch TV. In addition to residents of big cities, TV viewers living in rural areas were also involved in the

survey. More than 400 people participated in the survey. Questions were also asked about the respondents’ age, gender, place of residence, that is, whether they live in a metropolitan area or in a rural area, and what time they watch TV. All these factors directly affect the viewer’s choice of TV channel, including the program to watch. As the research scope of the Kantar research company is focused on the urban population, we tried to attract people from the region, district, and rural areas to our survey. Respondents were asked these questions: «Which TV channel do you often watch?», «Which program do you watch regularly?», «What time do you usually watch TV?»

As can be seen from Table 3, the majority of respondents watch Kazakhstan national channel (37.7%) and «Khabar» channel (35.2%). According to the rating of the survey, NTK is in third place (23.6%), followed by KTK (22.8%), Channel 31 is in fifth place (17.4%), then Eurasia and Astana (16.9%) TV channels are in sixth place. Balapan (16.4%) channel is in the seventh place.

According to the data of Kantar research company and according to the results of the survey, Kazakhstan is considered to be the most watched channel. And according to Kantar’s data, the «Khabar» channel, which is in 9th place, rose to second place according to the results of the survey. At the same time, it should be noted that the number of respondents who said «I don’t watch TV» was not few.

Table 3. Result of survey



According to Kantar's data, the KTK channel, which leads the top ten in both daytime and prime time, was ranked fourth in the survey organized by us. That's not to say that Kantar's data is wrong. There is no scientific evidence to claim that. However, researching the Kazakhstan media market should not be the responsibility of a single company. We can achieve real rating indicators only if there are several of them.

As the only media market monitoring company in Kazakhstan, we have to rely on the statistics provided by the research company Kantar. So, it is essential to analyze the work of several TV channels in the top ten shown in Table 2.

KTK is the first private commercial television channel in Kazakhstan. It was founded on November 2, 1990 by Izia Fidel. This TV channel was a new change, a new excitement for the general Kazakhstan audience. Today, the channel is officially called «Commercial Television Channel» JSC. It broadcasts to the territories of Kazakhstan, Karakalpakstan, Kyrgyzstan, Uzbekistan. 83.34% of the shares of the joint-stock company belong to the «First President of the Republic of Kazakhstan - Leader of the Nation» Private Fund, and 11.20% to «Media-invest» LLP (according to 2021 data). The main direction of the TV channel is informative and entertainment programs [2].

Due to the widespread use of social networks, television channels in Kazakhstan are opening their pages on social networks and trying to increase their television audience through those platforms. The official page of KTK TV channel on YouTube was registered on July 25, 2016. The absolute leadership among the channel's video products belongs to «Portrait of the Week», and on weekdays it can be seen that viewers prefer to watch the latest news releases. Artur Platonov's program «Khalyk kyzmetshileri» was included in the general group rating of programs only once. In total, the YouTube channel of KTK TV channel was viewed 423 million times from the date of registration until March 26, 2022. The channel shows links to all the information on KTK TV channel and invites to share opinions discussing news and projects shown on Facebook, Instagram, V Kontakte, Moimir networks [3].

Qazaqstan is a national TV channel that is a part of «Kazakhstan» Republican Television and Radio Corporation JSC. It started broadcasting on March 8, 1958. «Qazaqstan» TV channel has regional branches in 14 regions. In addition to the territory of Kazakhstan, it broadcasts to the regions of the Russian Federation, Kyrgyzstan, Uzbekistan, Turkmenistan, Mongolia and Xinjiang-Uyghur Autonomous Region. The direction of the channel can be determined from the information on the official website of the TV channel: «The leading place in the production of educational, cultural and entertainment, sports programs and the constantly developing TV channel...» [4].

The official pages of the national TV channel «Qazaqstan» were registered on the YouTube channel under several names («Qazaqstan TV channel / Kazakhstan TV / Kazakhstan TV / Kazakhstan TV) on July 1, 2010, and became the leading TV channel among the Kazakh contents on YouTube. From the date of registration to March 26, 2022, it was viewed more than 830 million times. Here are links to Instagram, Facebook, Telegram, TikTok, itube.kaztrk.kz, iOS, Android, Twitter, and VKontakte to discuss and share their news and projects [5].

NTK is a non-political, informative and entertainment television channel that broadcasts in the republic, which is in the third place in the rating table. This TV channel has been broadcasting since 1997. In most cases, the TV channel offered high-rated, popular Russian projects to Kazakhstani viewers. Among them are programs such as «Senbeysiz!», «Maximum», «Biz soyleimiz zhane korsetemiz». Today, the main goal of the NTK channel is to distribute entertainment content that gives good mood to the audience [6].

The official page of the NTK TV channel on the YouTube channel was registered on April 17, 2015. From the date of registration until March 26, 2022, more than 978 million viewers watched [7].

Khabar is a republican TV channel belonging to «Khabar» Agency. The history of the TV channel begins on October 23, 1995. Since 1997, the TV channel, created on the basis of Kazakh

Table 4. Indicator of 26.03-01.04, 2020 year

Units >>				Units >>				Units >>			
Rtg%				Rtg%				Rtg%			
Channels	[12.03.2020 - 18.03.2020]	[26.03.2020 - 01.04.2020]	Разница	Channels	[12.03.2020 - 18.03.2020]	[02.04.2020 - 08.04.2020]	Разница	Channels	[12.03.2020 - 18.03.2020]	[09.04.2020 - 15.04.2020]	Разница
ХАБАР 24	0.28	0.69	0.41	КТК	1.19	1.69	0.5	КТК	1.19	1.72	0.53
КТК	1.19	1.55	0.36	ХАБАР 24	0.28	0.65	0.37	QAZAQSTAN	0.78	1.07	0.29
ПЕРВЫЙ КАНАЛ	1.72	1.98	0.26	АСТАНА	0.58	0.86	0.28	ХАБАР 24	0.28	0.53	0.25
З1 КАНАЛ	0.73	0.99	0.26	СЕДЬМОЙ КАНАЛ	0.35	0.55	0.2	ПЕРВЫЙ КАНАЛ	1.72	1.96	0.24
АСТАНА	0.58	0.8	0.22	НТК	0.87	1.04	0.17	АСТАНА	0.58	0.79	0.21
НТК	0.87	1	0.13	З1 КАНАЛ	0.73	0.89	0.16	СЕДЬМОЙ КАНАЛ	0.35	0.55	0.2
СЕДЬМОЙ КАНАЛ	0.35	0.47	0.12	ХАБАР	0.23	0.38	0.15	ХАБАР	0.23	0.43	0.2
EL ARNA	0.08	0.15	0.07	EL ARNA	0.08	0.2	0.12	НТК	0.87	1.05	0.18
TAMASHA TV	0.36	0.42	0.06	QAZAQSTAN	0.78	0.9	0.12	EL ARNA	0.08	0.2	0.12
ХАБАР	0.23	0.29	0.06	ПЕРВЫЙ КАНАЛ	1.72	1.79	0.07	TAMASHA TV	0.36	0.48	0.12
ALMATY TV	0.13	0.17	0.04	BALAPAN	0.43	0.48	0.05	З1 КАНАЛ	0.73	0.82	0.09
МИР	0.4	0.44	0.04	TAMASHA TV	0.36	0.41	0.05	МИР	0.4	0.44	0.04
СТВ/РАХАТ	0.06	0.08	0.02	СТВ/РАХАТ	0.06	0.09	0.03	СТВ/РАХАТ	0.06	0.09	0.03
ОН-ТВ/ТАН	0.01	0.03	0.02	ТУРАН ТВ	0.02	0.04	0.02	ТУРАН ТВ	0.02	0.04	0.02
KAZAKH TV	0.09	0.1	0.01	ОН-ТВ/ТАН	0.01	0.03	0.02	ОН-ТВ/ТАН	0.01	0.03	0.02
ТУРАН ТВ	0.02	0.03	0.01	ALMATY TV	0.13	0.15	0.02	KAZAKH TV	0.09	0.1	0.01
QAZAQSTAN	0.78	0.78	0	KAZAKH TV	0.09	0.1	0.01	ALMATY TV	0.13	0.13	0
АТАМЕКЕН БУСИ	0.05	0.05	0	НОВОЕ ТЕЛЕВИД	0.01	0.02	0.01	SETANTA SPORTS	0.01	0.01	0
SETANTA SPORTS	0.01	0.01	0	МИР	0.4	0.4	0	МИР 24	0.01	0.01	0
МИР 24	0.01	0.01	0	SETANTA SPORTS	0.01	0.01	0	НОВОЕ ТЕЛЕВИД	0.01	0.01	0
НОВОЕ ТЕЛЕВИД	0.01	0.01	0	МИР 24	0.01	0.01	0	GAKKU	0.03	0.02	-0.01
QAZSPORT	0.06	0.05	-0.01	GAKKU	0.03	0.02	-0.01	SETANTA QAZAQ	0.01	0	-0.01
SETANTA QAZAQ	0.01	0	-0.01	SETANTA QAZAQ	0.01	0	-0.01	QAZSPORT	0.06	0.04	-0.02
GAKKU	0.03	0.01	-0.02	АТАМЕКЕН БУСИ	0.05	0.04	-0.01	АТАМЕКЕН БУСИ	0.05	0.03	-0.02
BALAPAN	0.43	0.4	-0.03	QAZSPORT	0.06	0.04	-0.02	ТОЙ ДУМАН	0.1	0.06	-0.04
ТОЙ ДУМАН	0.1	0.07	-0.03	ТОЙ ДУМАН	0.1	0.07	-0.03	BALAPAN	0.43	0.38	-0.05

television, has been broadcasting on a separate frequency. The channel's official website states that «Khabar TV channel in today's media space is kind of a bridge of political, socio-cultural values and traditions.» Although «Khabar» is a politically «weighty» republican-level TV channel, it ranks ninth in the rating table [8].

The official pages of the «Khabar» television channel were registered on the YouTube channel under the name «Khabar NEWS» on June 16, 2010. It contains the latest news of Kazakhstan and the world, information and analysis programs, politics, economy, business, currency exchange rates, culture, technologies, sports, interviews, special reports, events and much more. From the date of registration to March 26, 2022, it was viewed more than 119 million times. Here are links to Facebook and Twitter, where they are invited to discuss their news and projects [9].

«Khabar 24» channel, which is part of «Khabar» Agency, is not included in the top ten in the rating table. However, at the beginning of 2019, due to the epidemiological situation in the world and the country, it can be observed that domestic TV channels took the lead.

As you can see from the table, before the quarantine, the Khabar 24 channel was in 13th place in terms of share and rating. We can see that there have been significant changes in the ratings of the channels after the announcement of the quarantine situation.

The reason for such a rapid increase in the rating of «Khabar 24» TV channel can be explained by the fact that it regularly provides the latest information through hourly live news, briefings conducted by the Central Communications Service, direct connections from checkpoints, hospitals and regions. From these statistical data, we have once again made sure that citizens first of all need accurate and fast information during an emergency. It should also be noted that the demand for entertainment and concert programs, which are usually loved by the audience, decreased during the quarantine, and the rating of channels broadcasting content of this genre decreased [10].

And the «Eurasia First» channel, which was not among top rating table, was created in October 1997. In the first years of its establishment, the

TV channel broadcasted the media content of the Russian channel «Pervyi Kanal». In recent years, the share of Kazakh content has increased. However, it should be noted that the broadcast schedule of the channel today includes projects of the Russian TV channel such as «Zhyt zdoro», «Pole chudes», «Pust govoryat», «Na samom dele» [11].

«Qoslike» program, which has the highest rating among all TV channel projects in the top ten, is broadcast from this «Eurasia First» channel. According to the rating on March 30, 2022, the average share in four hours was 32.1, and the rating was 2.2.

Conclusion

The media plan and content of each TV channel is created according to the direction, activity and mission. The goal is to fight for the audience's attention, to prove competitiveness. In addition to the «competition» between TV channels, they have also been competing with social networks in recent years. Because it is known that most of the TV viewers are switching to social networks, and this trend will further complicate the TV channel's activities. However, many TV channels adapted to such innovations in time and learned to use them for their own benefit.

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Отандық телеарналардың медианарықтағы қызметіне талдау

Аңдатпа. Мақалада Қазақстан Республикасының Ақпарат және қоғамдық даму министрлігінде тіркеліп, отандық медианарықта жұмыс істеп тұрған телеарналардың қызметіне, бағыт-бағдарына, олар-

дың эфирлік кестесіндегі жобаларға, рейтинг кестесіндегі орнына талдау жасалады. Республикалық телеарналардың медианарықтағы рейтингін 20 жылдан бері Kantar («TNS Central Asia» ЖШС) компаниясы мониторинг жасап, зерттеп отырады. Компания ұсынған зерттеулерге сүйеніп, отандық телеарналар медиа-жоспар, эфирлік кестелер жасайды. Бұл – Қазақстандағы медианарыққа мониторинг жасап отыратын жалғыз компания.

Бір ғана компанияның зерттеуі біржақты пікір екенін ескере отырып, авторлар телекөрсетімдер арасында арнайы сауалнама жүргізген. Kantar компаниясы мен сауалнама деректері салыстырылып, телекөрсетім сұранысына талдау жасалған. Талдау барысында көрсетімнің тұрғылықты жері, жасы, жынысы да ескерілген. Осы зерттеулер нәтижесіне сүйеніп, бірнеше республикалық телеарнаның қызметіне, контентіне, әлеуметтік желілердегі аккаунтарына сараптама жасалған.

Түйін сөздер: БАҚ, интернет БАҚ, телеарна, медианарық, рейтинг, мониторинг, әлеуметтік желі.

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Анализ деятельности отечественных телеканалов на медиарынке

Аннотация. В статье анализируются виды деятельности отечественных телеканалов, направления, проекты в их графике вещания, а также их место в рейтинговой таблице телеканалов, зарегистрированных в Министерстве информации и общественного развития Республики Казахстан и работающих на отечественном медиарынке. Компания Kantar («TNS Central Asia» LLP) уже 20 лет занимается мониторингом и изучением рейтинга республиканских телеканалов на медиарынке. На основе исследований, предоставленных компанией, отечественные телеканалы создают медиаплан и графики вещания. Это единственная компания, осуществляющая мониторинг медиарынка в Казахстане.

Учитывая, что исследование только одной компании является предвзятым мнением, авторы провели специальный опрос среди телезрителей. Были сопоставлены данные компании Kantar и по опросу, а также проанализирован спрос телезрителей. При анализе также учитывается место жительства, возраст, пол зрителя. По результатам этих исследований был проведен анализ деятельности, контента и аккаунтов в социальных сетях нескольких республиканских телеканалов.

Ключевые слова: СМИ, интернет-СМИ, телеканал, медиарынок, рейтинг, мониторинг, социальные сети.

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