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Topical issues of increasing the share of domestic television content in the media market of Kazakhstan

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Abstract

Considering the historical, social and territorial peculiarities of Kazakhstan, television is still the most popular media. News and entertainment telecasts, programmes of art, social, political, business, intellectual, children's and educational genres, television series, films, shows of foreign and domestic production are broadcast.Numerous theories and concepts of journalism reflect the features of the existence of modern society and the multifacetedness of scientific approaches to the analysis of TV content issues. The paper is devoted to topical issues of increasing the share of domestic television content in the modern media market of Kazakhstan. The importance of the creation of competitive domestic tele products for the attraction of a viewership and potential advertisers is noted. The tendencies of increasing the volume of the state information order for the development of the domestic television industry are analysed and the author gives a number of recommendations.

Keywords: Media market, domestic television content, advertising market, state information order.

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1. Introduction

Is there a multi-level analysis in Kazakhstan on the content of the most popular telecasts—news, talk shows and television series? Is there a demand for their study by the authorities, political experts, special services or the market? Unfortunately, it's no secret that we sometimes find it difficult to answer these questions. Despite the intensive development of television day to day, in our country, it can still be said that there is no strategic programme for the development of domestic television, analytical and expert research work, which guides and directs the domestic television market. For this reason, a single ideological line, focused on common interests, has not formed in domestic TV channels. Therefore, in the future, a significant part of the tremendous work to be done in this direction remains for the domestic scientists.

Today, the Kazakh television industry has transformed itself into market relations and has started to rise to a new stage of development. In recent years, Kazakhstan TV series and adapted Kazakh versions of well-known world TV projects have appeared on TV screens. Special interest among viewers for the national product is promoted by the growth of the rating of domestic TV channels. This allows us to understand that domestic television programmes have gradually begun to move from quantity to quality. Nevertheless, there are a lot of overdue and unresolved problems in the production of TV programmes and television in our country. The problems accumulated in the agenda require scientific analysis and new approaches from specialists and experts.

2. Theoretical and methodological basis for research

In the context of globalisation and geopolitical challenges, the activities of the mass media are at the centre of attention, both foreign institutions and individual researchers. Modern trends in the development of tele content are not only the subject of journalistic research but also the focus of interdisciplinary sciences. In this regard, it is necessary to define scientific and methodological approaches to the study of issues related to the manipulation of mass consciousness through the use of different genre television programmes.

The theoretic and methodological basis of the study include works of modern domestic and foreign researchers on general and digital journalism, on theory of convergence, content production and distribution, competition issues in television and broadcasting, prepared by using materials about content market of TV system of Kazakhstan. The theoretical basis of the paper was prepared based on ideas and views of such scientists as Armstrong (1999), Beisenkulov (2001), Amos (2005), Eltzroth (2006), Tolokonnikova (2009), Evens (2010), Poluekhtova (2010), Gegelova (2011), Ernst (2012), Dondurey (2013), and Myasnikova (2013) as well as papers of other researchers involved with problems of content and advertising markets.

To solve the tasks assigned in this paper, different scientific methods were used such as: descriptive and comparative studies, content analysis, socio-empirical observation and methods of systematisation.

3. Internet TV and terrestrial television: advantages and disadvantages

New technologies and the dynamic effects of convergence are changing the way consumers access audio-visual content. This adds considerable uncertainty to business planning, in particular, concerning future demand, and implies the need to ensure a cautious and technology neutral approach in the design of regulation and the application of competition law. At the same time, the application of regulation and competition law becomes more complex as rapid technological changes and increasing demand for triple and quadruple play services complicate the process of delineating relevant markets and increase risks of overlapping regulatory jurisdictions. While the emergence of new products and services facilitated by convergence has lowered barriers to entry and rendered markets more competitive, participants to the forum provided many examples of restricted access to the market. The debate also revealed that competition authorities are increasingly aware of new competition challenges arising in the sector and have, therefore, become more active in launching policy interventions.

The television and broadcasting sector has been undergoing significant technological and structural changes, which have given consumers access to a great variety of communications and media services. Convergence is changing the way in which consumers use communication services and consume content, as it is available on new platforms and on various wireless portable devices. At the same time, technological change has impacted on regulation and conditions of competition.

The penetration of new technologies and the dynamic effects of convergence are changing the way that consumers access and view audio-visual content. Nowadays, it can be provided via multiple platforms: analogue or digital terrestrial broadcasts, satellite, cable or Internet Protocol (IP) and Over-the-top television.

A fundamental change affecting traditional broadcasting stems from the migration of networks to IP data transmission. Combined with significant broadband penetration, increases in bandwidth and the proliferation of digital devices, this has enabled different devices to use the same networks and has facilitated the ability of the communication industry to offer new and bundled services. This allows consumers to receive and decode video services across a variety of fixed and mobile devices.

Technological developments affect the conditions of competition as they alter: the range and quality of services; the underlying costs; the extent of barriers to entry (new technologies provide new means by which the market is contested); the ability of customers to switch suppliers and pricing mechanisms (technological developments allow for provision of pay per view services). Therefore, digitisation generally reduces barriers to entry (Organisation for Economic Co-operation and Development, 2013).

In addition to on-air television, intensive development of satellite, Internet and mobile television creates fierce competition for the audience in the domestic media market. At the same time, some researchers often say that the Internet supersedes television in the next 15–20 years because online resources possessing modern interactive technologies make it possible to watch the favourite programme without annoying advertisements and without time limitations of the programme broadcasting grid.

Today, 'television has turned from an ideological institution into a business' (Poluekhtova, 2010), for this reason, any channel to increase the flow of advertisers, first of all, is interested to provide its viewer with quality and new content. 'Television has also exhausted the initial opportunities in the Kazakh market, now, in order to develop it, earn, at the same time, turn it into an important factor of social development, we need to find our audience, adapt to its specific needs' (Beisenkulov, 2001).

As N. Gegelova notes, Internet TV is a daily tele system of prompt information provision to consumers living in any part of the world and at the same time, capable of preserving the archive of programmes that have passed on the air, not only providing television content of various genres and forms to various segments of the audience (Gegelova, 2011). However, despite this, traditional television plays an important role in people's lives. According to observations of sociologists, among the 500 hundred habitual actions of a person, apart from a sleep, the first place is taken by the time spent on the TV channel.

The wide spread of virtual relationships apart from real connections changed the tastes and requirements of the viewer to television production. The growth of the information flow, the intensification of intercultural ties and the more precise segmentation of the audience allow viewers to actively participate in all communication processes. However, if we take into account the incomplete provision of the country with computers, that the habit of the population to watch TV programmes through online resources is still incomplete, the high cost of high-speed Internet, the inadequate technical support of Internet TV, the incompleteness of technical parameters, the offered programmes, if one cannot always be found in the network free and available TV content, not to mention the past programmes (the time of preservation of information in the archive is limited), the value of traditional television channels are not less than that of new means of information transmission. In short, the main disadvantage of Internet TV is the restriction of tele content, which is the main reason that to this day the audience gives priority to broadcast, traditional TV channels. Russian researcher Myasnikova says: 'The list of programmes available in the network is still small. For example, TV channels consider it right to place only one known part of the television series on the site. In addition, the period of his demonstration is limited to only a few weeks, i.e., in 2 or 3 weeks, the transfer is erased from the archive or to be watched specially to subscribe' (Myasnikova, 2013).

Comparing the channel with the Internet, you cannot underestimate the role of the first in the production of content. 'A TV channel is not a way of broadcasting, it's a content team. Although a single Internet user is able to report facts of concern, write interesting texts, download exclusive videos, he is not able to create high-quality and meaningful audio-visual content that can be of interest to tens and hundreds of millions of people. A significant part of the most visited Internet content is developed by a classical team of film studios, TV channels and companies producing tele contents. This is a collective work',—says K. Ernst (Ernst, 2012).

Summarising the foregoing, it should be noted that the role of on-air television is still greater than Internet TV in many respects. This is evidenced by numerous studies conducted in our country and abroad.

4. Opportunities and problems of the Kazakh television industry in the production and promotion of domestic content

Nine out of ten people over the age of four spend at least 5 days a week for about 4 hours watching television. Domestic content is a content produced in the Republic of Kazakhstan and content that was produced in cooperation with Kazakhstan. Only television, 51% of which is the film industry, brings the explanation of any event straight to the subconscious of man. We, caught in the flow of virtual phrases, not only do not distinguish the composition, volume and structure of the ether but also do not even notice how involuntarily we fall under its influence. We not only do not think but also we do not even feel how masterfully we operate tele text.

Whatever they say, the daily broadcast shows that the technologies for producing content on Kazakhstani TV channels rely only on consumer, market-based criteria. To date, the rating has turned into the only metasystem direction in the creation of domestic television content and the issue of content should have a quantitative rather than a qualitative form. Since, under this concept, the form of telecasts is the key, which reveals the content and meaning of the TV channel.

Nevertheless, rating is just a means of measuring, consisting of the number of certain people who simultaneously turned on TV receivers. But this does not prove that they all watch TV and perceive and accept the content shown on the air. As it is known that 'except target viewing of the TV, there are types such as casual, discrete (by fits), background (being engaged in another matters) and sound (hearing only of a voice) viewing' (Dondurey, 2013). However, the leaders of all TV channels determine the results of their work on this rating; as a result of this, they achieve their main goal–super-profits. And such socially important goals as personal and national development, the formation of civic consciousness, work aimed at psychological health, etc. is completely forgotten. And this can satisfy society? Is the television product in line with the demand of the audience? In the opinion of world professional critics, moody viewers and active Internet users, in any country there is a tendency of dissatisfaction with the quality of TV content.

Commercial companies are willing to pay a huge amount for advertising: as only TV channels can capture at the same time millions of potential consumers. 'It is known that in this business, the cost of advertising is determined by rating, therefore, any TV channel applies all forces for justification of trust of audience' (Tolokonnikova, 2009).

Modern requirements show that only a dynamic, constantly changing, renewing air can adequately meet the interests of the viewer. However, not every TV channel can provide such a variety, since the tele industry itself requires considerable expenses. For this reason, the entire TV industry in the world works in two directions—as operators responsible for the quality of the disseminated signal and as developers of television programmes. Thus, they effectively use their potential and time, optimally distributing responsibilities among themselves.

The Kazakh television sphere, since its transition to market relations, has passed a quarter of a century, also works in this system. Some outsourcing companies, preparing TV programmes, managed to take their rightful place in the domestic tele market. All TV channels of the republican level, except regional TV channels, use the capabilities of companies offering almost finished products. But the problem has the other side: unfortunately, 'there are not so many producer centres and television companies that can offer high-quality products in the country' (Tsai, 2009). The consequences of this are strongly reflected in commercial TV channels that do not receive from the state.

Unfortunately, Kazakhstan's viewers still prefer foreign products, especially Russian programmes and Turkish, Indian, Korean television series. 'One of the reasons for this is that the domestic tele market cannot always offer a quality product and this free space that is in demand fills foreign content' (Veselova, 2012). For example, during the prime time, 20–40% of the programmes of Kazakhstani television channels are occupied by foreign television series (Amos, 2005).

The imbalance in the share of foreign television programmes, freely distributed in the territory of Kazakhstan, for many years, had a negative impact on our domestic television industry. First, Kazakhstan's TV channels, accustomed to foreign content, have adapted to the easy way to fill the air. The finished product does not require unnecessary costs and creative searches. As a result, domestic television channels were unable to form competitive immunity in modern conditions. Secondly, it is no secret that foreign content freely entered into our information space, largely affected the cultural, socio-political views and worldview of the local audience, from the point of view of national security. In this regard, it should be noted that in our country, to this day, there is no censorship mechanism that assesses and establishes control over foreign television programmes.

Of course, it is clear that although domestic TV channels are interested in increasing the national content, they are required to comply with the requirements of the law, rather than the spectator demand. Especially for commercial TV channels, the production of domestic tele products is unprofitable from an economic point of view, so in many cases they do not risk shooting television series and megaprojects that require colossal funds. World practice proves that for any TV channel it is much cheaper to buy finished content than to withdraw its product. For example, 'if today TV channels of our country for every series of Turkish television series with high ratings on the market pay $ 3,000 each, then at least $ 30,000 is needed to withdraw one series of the domestic television series' (Bocharova, 2013). Instead, on commercial channels, most of the national content is composed of low-cost news, talk shows and entertainment programmes.

Compared to commercial channels, state channels have a great potential in creating national content. It is obvious that state patronage in many cases, instead of creating conditions for equal competitiveness for market players, increases the hegemony of state channels. In recent years, commercial channels have also begun to receive state orders. However, managers of commercial channels say that these funds are not enough to cover the full costs of airtime. According to the former general director of the 'KTK' channel, Kanat Sahariyanov, in 2015, the KTK had the opportunity to shoot only three series, each consisting of three parts (Internet portal 'Radiotochka.kz', 2013). And the TV channel 'Kazakhstan', which has a state status, 'brought to the market in the last 3 years almost 50 serials' (Yeltaikyzy, 2015). Then, it is natural that state-owned TV channels are leading in the production of domestic television series.

When assessing the domestic television industry, one should not forget the existence of a significant influence on its development of geopolitical factors. It is impossible to remain aloof from the influence of neighbouring Russia, which is one of the 10 powerful European tele markets. For a long time, Kazakhstan is the second market for the Russian television and film industry, which is free to broadcast its TV content on the territory of our country. First, it is much more efficient to buy a quality product with fewer expenses than spending a lot of money to remove a television programme with a low quality. Secondly, the absence of language barriers saves from unnecessary work and costs, such as translation, dubbing and making a subtitle. Thirdly, the closeness of the mentality shows that the demand from local viewers for Russian TV content, especially for serials and talk shows, is still high.

Considering that compared to Kazakhstan, the Russian TV market is more than 10 times, according to it, and the profit from advertising is also more significant. Part of the profit received from advertising is spent on large projects with high ratings. In this regard, it is clear that Kazakhstani television channels with a much narrower advertising market cannot compete with their Russian counterparts. In addition, Russian channels that freely broadcast on the territory of our country, before that, divided the domestic advertising market without any obligations and caused significant damage to the national television industry. Only from the advertising market, foreign media resources in Kazakhstan received a profit of over 4 billion tenges every year. Only in recent years, work in this direction has changed in the direction of the interests of Kazakhstani television channels. In our country, in accordance with the amended Law on Advertising, now a decent amount coming from advertising will be used for the production of domestic television programmes.

The law of our country 'On TV and Radio Broadcasting does not limit the preparation of local content outside of Kazakhstan'. This privilege allows TV channels to make transfers abroad in order to prepare a quality product and save money. Specialists of our country's television say that in Ukraine and neighbouring Russia, studio and decoration, technical equipment and other types of services are much cheaper and at the proper level.

Nevertheless, despite the belatedness for several years, the law supporting the domestic television industry was adopted in 2012; it established the requirements for the proportion of foreign and local content that goes on the air. In accordance with the Law of the Republic of Kazakhstan 'On Television and Radio Broadcasting', domestic television and radio broadcasts in the volume of weekly television and radio broadcasting of television and radio channels should be from:

- 1 January 2014—not less than 30%.
- 1 January 2016—not less than 40%.
- 1 January 2018—not less than 50%.

The state programme 'Information Kazakhstan–2020' in order to ensure the competitiveness of the domestic information space provides for an increase in 2020 of television production in the domestic industry to 60%.

State policy in support of the domestic product immediately began to bear fruit. According to the research of the company 'J'son & Partners Consulting', domestic content prevails in the broadcasting structure on Kazakhstan's TV market nowadays. Such tendency hasn't been changed for several years. Domestic content's share in the air of the largest TV channels by the number of titles was around 53% in 2014.

If to refer to the research of J'son & Partners Consulting, three TV channels broadcast most actively foreign content: '31 Channel' (69.5%), 'Astana TV' (68.4%) and 'First Channel Eurasia' (65%). These channels continue to provide their viewers with foreign drama movies and TV series.

It is worth to mention that First Channel Eurasia is sublicensor of a global network of First Channel (JSC First Channel owns around 20% of shares) and '31 Channel' is the sublicensor of TV Stations Networks (STS)—STS Media owns around 20% of shares.

Foreign content has only 13% of air time on 'Kazakhstan' Channel and is being presented mainly by TV series. The prevailing of domestic content over foreign one is being explained by the fact that the channel has a government status. 'Khabar' took the second position by share of domestic content—72.3%, 'Seventh Channel' is following with 60.7%.

Largest national TV channels' broadcasting networks have various contents: from different TV and talk shows till informational programmes and drama movies. Broadcasted content depends mainly on the TV channel format and targeted audience.

'NTK' channel has a position of entertainment channel; entertainment programmes have 44% of the broadcasting network and around 33%—TV series. Other TV channels—'First Channel Eurasia', 'NTK', 'Astana TV' and '31 Channel' are positioning themselves as TV channels of general topics, and in contrast with NTK provide various content for TV viewers.

Entertainment programmes, shows (Sketch-show, TV show, talk show, reality show etc.), drama and TV series are being broadcasted by all TV channels. All channels, excluding 'NTK' broadcast news content.

Several topics with the lowest share got into other category: leisure (TV programmes about renovation, cuisine, medical programmes, etc.), music, sport, TV shops and others.

According to experts' data of J'son & Partners Consulting, TV series (39%), entertainment programmes (12%) and drama movies (11%) have the largest shares by the number of titles among researched topics on national Kazakhstan's TV channels.

According to J'son & Partners Consulting, First Channel Eurasia is the most popular channel among terrestrial TV channels with a share of 19.6% as of December 2013. KTK is the second —16.8%, and the third most popular is 31 Channel—11.7%. TOP programmes of Kazakhstan's TV are being broadcasted by First Channel Eurasia and KTK. Genres are news, entertainment programmes and TV series. By overview, the content's diversification, the following tendency can be seen: replacement of foreign content by a domestic one.

TV market in Kazakhstan is developing very dynamically. By J'son & Partners Consulting estimations, market volume was 164 million USD in 2013.

Among domestic TV channels, the trend of inviting foreign specialists is also widely spread. The main reason for seeking help from foreigners is the lack of professional specialists in the country who can make high-quality TV shows. The shortage of personnel in this sphere does not fulfil the same demand of all participants in the tele market. General Director of the 'Seventh Channel', Aziza Shozheyeva, says that she often invites foreign specialists and consultants to Kazakhstan to train his employees (Bocharova, 2013). The Kazakh television industry still needs assistance from foreign creative agencies, especially when developing adaptations of known world formats.

5. Conclusion

In the sphere of information security, the issue of the development of domestic TV content in quantitative and qualitative ratio remains relevant at any time. In order to resist the continuous cultural expansion of the developed countries of the world, the state protecting the information space from external factors must create fair and equal conditions for all domestic TV channels in accordance with the law of market relations. For this purpose, we believe that the Ministry of Information and Communications of the Republic of Kazakhstan should carefully study the following wishes and recommendations to:

- Reduce broadcasts of foreign TV channels in Kazakhstan.
- Consider mechanisms of the taxation of the TV channels relaying foreign content according to the timekeeping and genre.
- Create the special working group on verification of the contents of foreign television programmes under the Ministry of Information and Communications of the Republic of Kazakhstan.
- Provide tax incentives to domestic television channels for the development of the TV series industry.

Most importantly, it is desirable for authorised bodies, along with the imposition of obligations in the information policy, to be able to correctly apply mechanisms of stimulating TV channels at the legislative level.

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