

FINDINGS

Media Survey 2002 in Ulaan Baatar, Mongolia

A comprehensive media survey was conducted from 25 April to 10 May 2002 in Ulaan Baatar. The purpose was to make a reliable city-wide survey to determine the media use of Mongolians living in Ulaan Baatar. Media questions included media ownership and use as well as sources of news. A total of 1,000 personal interviews were conducted, representing the six most populated districts of the capital.

ROSS JAMES
EILA ROMO-MURPHY

The first systematic face-to-face media survey was conducted in spring 2002 in Ulaan Baatar, the capital city of Mongolia. One thousand interviews were conducted in six mostly-populated districts of Ulaan Baatar, representing the whole of Ulaan Baatar city residents. The purpose of the survey was to research city resident's ownership and use of media technology, readership of newspapers and listening of domestic and international radio and watching television, as well as the status of cable and Internet penetration. Health Communication Resources of Australia initiated the survey to define media consumption and usage patterns in order to design health-promoting radio programme strategies. This article deals with the results of media consumption. A second article (James and Romo-Murphy, 2003: in press) presents the findings of health-related aspects of the study.

Media Studies in Mongolia and UB2002

A search of the literature and the Internet found that some Mongolian media studies had been conducted previously.

The Press Institute of Mongolia monitored the development of Mongolian media and published annual

reports of newspaper circulation, radio and TV stations and some local commercial research agencies had conducted economic and voting polls.

Several Internet sites reported organization-sponsored media initiatives, particularly in the Mongolian rural areas, but none provided comprehensive media patterns for Ulaan Baatar, the capital city. See, for example,

- http://www.unesco.org/webworld/news/2001/011003_mongolia.html (13 Nov 2001)
- http://global2.sansibar.fi/uutiset/teksti_popup.php?id=889 (13 Nov 2001)
- <http://www.eurasianet.org/resource/mongolia/links/mongtrip.html> (16 Nov 2001)

Although Myagmar et al. (2001: 3–13) described the Mongolian media scene, they noted the lack of reliable figures on media ownership and consumption patterns.

The survey in Ulaan Baatar in April 2002 was the first reliable, systematically conducted media survey conducted in Mongolia. It resulted in a detailed assessment of newspaper readership, radio and television use and their audiences, as well as ownership of media technology at the household level.

Methodology

A questionnaire comprising three sections (media, health and demographics) was constructed in the English language and then translated into the Mongolian language. The questionnaire was pre-tested and revised several times before being approved. The instrument, comprising 63

Dr. Ross James is Director of Health Communication Resources and Adjunct Research Fellow in the School of Public Health at Curtin University. Eila Romo-Murphy is a researcher with Health Communications Resources.

questions, took an average of 30 minutes to administer.

Face-to-face personal interviews were conducted by 26 interviewers who were fourth-year sociology research students. The interviewers underwent a three-day training course to administer the questionnaire. The interviewers practised first with another interviewer and then in their own neighbourhood, with observers present to check their performance. Interviewers were authorized to proceed with actual questionnaires after their practice questionnaires had been checked for accuracy. Interviewers travelled to randomly-selected residential areas by public transport. For safety reasons, the interviewers operated in pairs.

Observers validated the interviewing procedure and the random selection of household by observing 5.7 per cent of the interviewers, representing standard validation requirements for this type of survey. A follow-up team also phoned 38.7 per cent of all surveyed households to verify that the questionnaire had in fact been completed at that household. All questionnaires were returned for thorough checking before the interviewer was allowed to proceed with the next set of questionnaires.

The Mongolian National Statistics Office (NSO) provided the locations of randomly sampled Primary Sampling Units, blocks of households in *komisses* (residential sub-districts). We applied the fifth-door rule to randomly select a household inside the blocks that had been randomly sampled by the NSO. All members of the household aged 15 years and above were listed in order of descending age and a kish grid selection of one respondent was made. If the randomly chosen respondent was not available at that time, the interviewers returned to the same household later to administer the questionnaire to the randomly-selected respondent. If the chosen respondent was not available after three attempts, the interviewers were allowed to choose another interviewee from a different household.

Table 1 lists the six districts of Ulaan Baatar that were surveyed along with the population of each district as of December 2001, the share of each district from the total population of districts, the number of the Primary Sampling Units for each district, and the share each district had of all interviewees.

Since the most recent census for Ulaan Baatar was completed in 2000, the NSO provided updated population

projections for 2001 for the Ulaan Baatar population.

The questionnaire used the same census categories as the NSO for all data except for education, which were not available at the time of the survey. As the education categories were received after the interviews were conducted, we could not weigh the data with the same education categories as the NSO. However, the data were weighted by sex and district.

We had to assume that the demographic breakdown of the population in April–May 2002 was not significantly different from that projected by the NSO for 2001, and therefore the 2002 survey represents the UB population as of spring 2002. The unofficial estimates of the Ulaan Baatar population are higher because people who move into the city ger areas do not always register their arrival with local authorities.

The strengths of this survey is that it was organized and managed as a team approach with the involvement of WIND (Salkhi) FM, a local community radio station. The Mongolian NSO provided the sample representing the Ulaan Baatar population. Interviews were conducted by trained, local interviewers under the supervision of an experienced media researcher. Observers conducted checks to validate the interviews and the coding of data was continuously checked to avoid errors.

One organizational difficulty of this survey was that sufficient translators were not available to assist foreign supervisors during the training of interviewers and the cross-checking of the questionnaires. Although this lengthened the communication process unnecessarily at times between the interviewers and the supervisors, it had no effect on the results.

Findings

Media ownership

The most commonly owned medium in Ulaan Baatar was the colour TV, owned by 82.6 per cent of households, followed by the radio (77 per cent) and the cassette player (66.4 per cent). Telephone came next, with half the households having fixed-line phones and half having

Table 1
Ulaan Baatar districts, sampling size and interviewed households

<i>District</i>	<i>Population</i>	<i>Percentage of population</i>	<i>No. of primary sampling units</i>	<i>Percentage of interviews</i>
Songinohairhan	111,818	22	22	23.8
Bayanzurh	109,811	21	21	22.1
Bayan Gol	103,051	19	19	18
Chingeltei	78,516	15	15	14.4
Suhbaatar	71,718	13	13	12.2
Khan Uul	52,425	10	10	9.6
Total	527,339	100	100	100

cellphones. Some had both fixed-line phones and cellphones while some households did not have a fixed-line phone but had a cellphone. Ownership of other media technology included black and white TVs, VCRs, CD players and car radios; each of these owned by 20–30 per cent of households.

The finding of this study strongly indicate that TV ownership generally (and of colour TV sets specifically) has increased markedly since 1990 when, according to Myagmar and Nielsen (2001), 41 per cent of households had television but with no determination of whether the TV sets were colour or black and white.

Media use

Two-thirds of households in Ulaan Baatar (65 per cent) listened to the radio “yesterday” and one-fourth (23.1 per cent) within the previous seven days. Watching TV was more frequent with almost every household watching TV daily (91.3 per cent) or weekly (7.7 per cent).

Figure 1 shows the consumption patterns of radio and TV for respondents who tuned in “yesterday”. Listening to the radio stayed at the same level throughout the day; from 0700 to 2400 hours, with between 10 and 15 per cent of households listening at any time. Even in the evening, radio listening remained fairly steady with only a small decline in numbers when TV viewing leapt dramatically at 1800 hours.

Radio and TV times overlapped each other from 2400 to 0600 hours until the morning radio block from 0600 to 0900 hours, which was radio’s best time since every tenth household in Ulaan Baatar was listening to the radio and not watching TV. From 0900 to 1300 hours radio and TV times overlapped. The period of 1300 to 1700 hours was radio’s second ‘best’ listening time, when more people listened to the radio than watched TV.

Radio stations

In spring 2002, there were 14 FM stations in Ulaan Baatar, broadcasting mainly in Mongolian with the exception of

FM103.1 (BBC) and FM106.6 (VOA) which broadcast in English, and a few stations broadcasting in Japanese or Russian. The four most known stations, each reported by 80 per cent of households, were FM102.5, FM107, FM107.5 and Relay Radio Mongol* (the state-owned relay station).

The same stations that were most well known also had the largest regular audience, on the basis of “listening at least once a week”. The three most well known radio stations each had regular audiences of almost 60 per cent of households. Six other FM stations each had a total of 40 per cent of households listening them regularly.

TV stations

Ulaan Baatar has terrestrial television stations as well as cable television systems. Cable systems provide between 14 and 33 channels of predominantly foreign television. The questionnaire surveyed the viewing of five television stations: the national Mongolyn Undesnii, three local stations (UBS TV, MN Channel 25 and Eagle TV) and one community station, ORT (Russian Community Television). Noyan TV was not included since it can only be received by some parts of Ulaan Baatar.

The national television channel, Mongolyn Undesnii, was the most watched with 97 per cent of households tuning in at least once a week. This was followed by MN Channel 25 (95.8 per cent), UBS TV (90.5 per cent), Eagle TV (86.7 per cent) and ORT (72 per cent).

Cable services

A total of 42 per cent of households subscribed to cable service. However, 79.8 per cent of households reported they had watched cable either at home or at a friend’s or relative’s house. The cable company most subscribed to was Sansar with 26.1 per cent of households. Khiimore was subscribed to by nine per cent, followed by Medeelel (four per cent) and Suljeeone (two per cent). Other cable services had a smaller share of the market.

The survey asked for the frequency of watching 16

Figure 1
Listening to radio and watching TV “yesterday”, UB2002

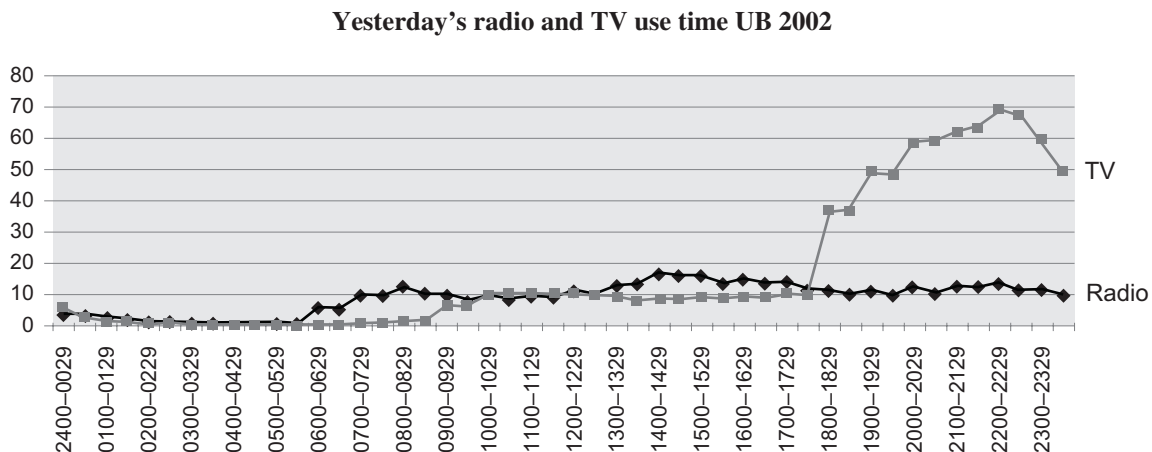


Table 2
Watching frequency of cable channels, UB2002

Channel	At least <i>Less often</i>		Never	DK/NA
	once a week	than once a week		
Inner Mongolian TV	43	22.7	0.3	34
ORT	41.2	17.3	0.2	41.3
MTV	36.4	14.9	0.3	48.4
TV3 Russian TV	33.3	15.2	0.4	51.1
Arirang TV	30.2	13.3	0.6	55.9
NHK	26.3	18.1	0.4	55.2
National Geographic	24.9	10	0.4	64.7
Star TV Prime sports	22.4	11.5	0.4	65.7
Star TV Movies	21.4	12.8	0.6	65.2
Cartoon Network	20.5	10.5	0.8	68.2
Channel V	16.5	10.7	0.5	72.4
DW	15.5	11.2	0.8	72.5
BBC World	15.1	12	0.6	72.3
Other 1	12.7	3.6	0.1	83.6
CNBC	10.7	6.1	0.5	82.6
ABC Asia Pacific	6.6	4	0.5	88.9
Worldnet/VOA TV	6	3.2	0.4	90.4
Other 2	4.7	2.1	0.1	93.2

channels. Table 2. shows that Ulaan Baatarians liked to watch the cultural programming of Inner Mongolian TV, which has the highest daily and weekly audiences. Russian influence is seen in the presence of several Russian channels (ORT, TV3 Russian TV and PTP Russian TV, mentioned most often in “other 1” channel). Asian channels enjoy higher audiences than Western channels. Channels most often mentioned in the “other” category were: PTP Russian TV, Fasion, MTV Russia, Ren TV, Shara India, Hollywood, HTB, CCTV Chinese, Video, TV6 Russia, Cinema and MSM.

Source of news

Domestic TV appeared to be the source most accessed for both Mongolian and international news. The Mongolian newspaper was the second most important source for both local and international news and it took a small lead over domestic radio. Word of mouth was more often a source of Mongolian news rather than international news.

When asked “What is the one most important source of

news”, 75 per cent of respondents said TV, for both local and world news. Foreign radio was the most important source for international news for only 0.8 per cent of Ulaan Baatar households, foreign TV for 7.4 per cent, and the Internet for 3.7 per cent of households.

Newspapers

Newspapers were almost as important as the radio as a source of national and international news. However, only 40 per cent of households read newspapers daily while 60 per cent of households turned to the radio daily for their news. Weekly use of the radio and newspapers was at the same level—about 80 per cent of households read the newspaper or listen to the radio at least once a week.

About two-thirds of households had read *Seruuleg* (a weekly paper), *Udriin Sonin* (a government daily paper), *Unuudur* (a private daily paper) and *Humuus* in the previous 12 months. Another government daily, *Zuuny Medee*, was read by half the households during the previous year. *Udriin Soniin* and *Unuudur* were each read daily by almost 20 per cent of households, followed by *Zuuny Medee*, *Seruuleg* and “Others” with just under 15 per cent of households each.

The list of “other” newspapers volunteered by respondents without prompting was quite lengthy, reflecting the multitude of newspapers and magazines that are published. “Other” newspapers or magazines mentioned most often were *High Society*, *The Life of People*, *Secondary School News*, *Companions*, *Mongolian Appearance*, *Your Photograph* and *Super Newspaper*.

Place of access to selected facilities

The survey asked about access to several facilities: cable, satellite dish, PC, the Internet and e-mail. From these facilities, cable was most common with four-fifths of households having access to cable TV—about 40 per cent at home and about 40 per cent at friend’s or relative’s house. On the other hand; ownership of satellite dishes is not common. Two per cent of households had cable at home and another 2.5 per cent had cable at a friend’s house.

Half of the households had access to a PC, which was most often available at a work or study place. Every sixth household had a PC, but only five per cent of households were able to use the Internet or e-mail from home. Internet cafes and work or study places are used both for web surfing and e-mailing. All in all, every third household had

Table 3
Place of access to selected facilities, UB2002

	Home	Friends	I-net café	Work/study	Cell	No access
Cable	42.9	39.1	0.4	2.9		21.7
Satellite dish	2	2.5	0.5	1.6		86
PC	14.6	9.5	11.2	25.2		51.7
I-net access	5.5	4.2	19.2	14.4	0.5	62.5
e-mail service	5.1	3.7	17.8	11.7	0.8	64.1

Internet access and every third household had e-mail access.

Few had Internet (0.5 per cent) and e-mail access (0.8 per cent) on their cellphone, even though half of the households had a cellphone each, or two to three cell phones.

One-third of households had used the Internet sometimes. The Internet was used daily by 6.3 per cent of households and weekly by 15.2 per cent of households. The rest, 11 per cent of households, had used the Internet within the past month or the past 12 months. The most often mentioned reasons for Internet use were e-mail (25.6 per cent of households), gathering news and information (19.2 per cent of households), and browsing the World Wide Web (7.1 per cent of households). Other reasons for Internet use were school or study assignments, chatting, listening to audio, or other reasons, each mentioned by around four per cent of households or less.

Conclusions

The 2002 Ulaan Baatar media survey provides, for the first time, comprehensive details of media access and usage by Ulaan Baatar households. No other survey has such complete data with which to compare its results. It shows that there is a high level of media ownership in the city, which equals to that of Indonesia and other medium-developed countries in Asia. (Fortner, 1996: 7; Mytton, 1993: 224–225, Sanyoto, 2002: 84).

One unique finding from the survey was that people in Ulaan Baatar households have a fairly constant pattern in listening to the radio throughout the day which does not decline rapidly in the evening when television viewing dominates, unlike the patterns seen elsewhere. For example, surveys conducted in 10 Chinese cities and Buenos Aires, Argentina, showed radio listening peaking in the early morning from six to seven a.m. and stayed low after that during the day. A survey in Cambodia showed noon and late evening peaks and lowest listening figures in the evening until 10 p.m. (Fortner, 1996: 19; 1998: 1; Mytton, 1993: 157)

Although television viewing in the evening is extremely high, as in elsewhere, the levels of radio listening remain fairly constant until midnight and at about the same levels in the daytime. The most regularly accessed medium was the television, followed by the radio and newspapers.

Changes in the Mongolian constitution since 1992 have provided a positive climate for media to grow freely and the evidence can be seen in the number of FM stations and

weekly newspapers. Television stations have not increased greatly. However, cable subscriptions have become more popular with half of the households subscribing to cable services. The most watched cable channels are Inner Mongolian and Russian-language channels with English language and other foreign channels watched the least.

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Mongolia's daily newspaper circulation was 27 per 1,000 inhabitants in 1996, compared to Russia's 105. From Asian countries, Pakistan, Tajikistan and Sri Lanka were about at the same level in 1996. Lower figures, as low as four per 1,000 inhabitants of daily circulation, are found in Laos, Myanmar and Vietnam. Nepal and Kyrgyzstan had a ratio of 15 per 1,000.

In electronic media, Mongolia's ratio of 142 for radio receivers per 1,000 was in 1997 close to ratios in India, North Korea, the Philippines, Tajikistan and Vietnam. Similarly, Mongolia's ratio of 47 for television receivers per 1,000 is close to that of Indonesia, North Korea, Kyrgyzstan, the Philippines and Vietnam. In 1997, Russia had 417 radio receivers and 410 television receivers per 1,000 inhabitants.

In Mongolia, there was a rise in television, from 3.4 receivers in 1980 to 24 receivers per 1,000 inhabitants.

Endnote

In Mongolian language this is called "shugamyn radio". Elderly people especially distinguish between "radio" and "FM radio". For them, radio means first of all the Mongolian radio that is transmitted by relays, and is therefore called "Relay Radio Mongol". Relay Radio Mongol is actually the same as Radio Mongolian AM, the state-owned radio. They transmit on two separate channels. However, the programming hardly differs from each other. Relay Radio Mongol is more well-known than Radio Mongolian AM (35 per cent of household were aware of the Radio Mongolian AM).

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