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DIGITAL TRANSFORMATION IN THE KAZAKHSTAN

Abstract

This research presents the results of a sociological study on the media behavior of the adult population of Kazakhstan. The aim of the research is to identify the specifics of media consumption of digital technologies and media preferences of the adult population.

The main task of our empirical research is to determine the mechanism of access to the main technical means, and the media behavior of active users. The research methodology includes Kuantitative and Kualitative methods: a survey among the target group, sampling over 2500 respondents from all regions of Kazakhstan. We conclude that three Kuarters of the respondents will use three main channels: television, informal channels and Internet resources. Currently, there is a preserved tradition of formalized passive perception of information through television. The results of the study can be used in applied work in media marketing and digital business.

Keywords: digital media, digital transformation, media activity, media behaviour, media consumption

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ҚАЗАҚСТАНДАҒЫ ЦИФРЛЫҚ ТРАНСФОРМАЦИЯ

Аннотация

Мақалада Қазақстан тұрғындарының цифрлық дәуір контексі аясында медиатұтынуы мен талғамы бойынша әлеуметтік зерттеулер келтірілді.

Зерттеу мақсаты Қазақстандағы тұрғындардың цифрлық технологияларды медиатұтыну ерекшеліктері мен медиаталғамын айқындау саналды. Эмпирикалық зерттеулердің басты міндеттеріне: коммуникацияның техникалық құралдары мен ақпараттың цифрлық арналарына қолжетімдік механизмін, сондай-ақ цифрлық дерекөздерді белсенді медиатұтынушыларды айқындау жатады. Зерттеу методологиясы сандық және сапалық әдістерге негізделді: мақсатты топтар мен фокус-топтар арасындағы сауалнамаға Қазақстанның барлық өңірлерінен 2500 респондент қамтылды. Зерттеу нәтижелерін медиамеркетинг және цифрлық медиабизнес бойынша қолданбалы жұмыстарда пайдалануға болады.

Түйін сөздер: цифрлық медиа, цифрлық трансформация, медибелсенділік, медиаталғам, медиатұтыну

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ЦИФРОВАЯ ТРАНСФОРМАЦИЯ В ФОКУСЕ МЕДИАКТИВНОСТИ И МЕДИАПОВЕДЕНИЯ НАСЕЛЕНИЯ

Аннотация

В статье представлены результаты социлогического исследования по медиаповедению взрослого населения Казахстана в контексте вопроса мировоззренческих ориентаций в цифровую эпоху.

Целью исследований явлется определение специфики медиапотребления цифровых технологий населения Казахстана, также выявление медиапредпочтений взрослого населения. Основными задачами эмпирических исследований являются: определение механизмов доступа к основным техническим средствам коммуникаций и цифровым каналам информации, определение медиаповденения активных пользователей цирфовых источников. Методология исследования основана на количественные и качественные методах: опрос середи целевой группы и работа в фокус-группах. Выборка квоты охватывают 2500 респондентов всех регионов Казахстана. Результаты исследования можно применить в прикладных работах по медиамаркетингу и цифровому бизнесу.

Ключевые слова: цифровые медиа, цифровая трансформация, медиактивность, медиаповедения, медиапотребление

Introduction. One of the meanings of the term digital transformation stands for achieving digital businss maturity, affecting individual segments of society, such as government, mass communication, medicine, and science. Digital solutions not only improve and support traditional methods but also stimulate the emergence of innovation and creativity.

The digital revolution resulted in a universal way of global communication since all types of information conversed into digital form. The level of the digital transformation of enterprises varies by country. According to the Center for Integration Studies of the Eurasian Development Bank, the main driver of digital transformation in Kazakhstan is the public sector, with the highest Digital Implementation Index (DII) [1].

The digital transformation with its low entry threshold has created uniKue challenges and opportunities for the market, increasing competition between enterprises, especially in the field of media and communications. The determining factor in digital transformation is its pace of development. Correlation of the speed of technology development and, as a result, digital transformations allows us to state a Kualitative jump in the speed of development in the new digital era.

This large-scale task reKuired digital channels for the delivery of information flows that did not exist before. It also needed novel ways of organizing information exchange, which entailed the birth of new media. Along with well-known mediums traditional media, new ones appeared: mobile communications, the Internet, digital television, video games, podcasts, etc. All of them carry within themselves the communicative and social changes that affect every social group.

Speeding up the process of digital transformation is one of the biggest challenges for Kazakhstan, as well as for other developing countries of the world. One of the important tasks of the State Program “Digital Kazakhstan” is the digitalization of all sectors of the economy and the expansion of ICT infrastructure [2]. The implementation of this program by the state opens up new opportunities for the development of the country's media market and, accordingly, a competitive business environment for digital transformation.

As of January 15, 2019, 3328 media outlets were registered in Kazakhstan, of which 2790 were periodicals, 128 were television channels, 70 were radio, and 340 were news agencies and online publications. The largest group of

media outlets remains print – 2790 (or 83.8%) of the total number of registered media outlets, of which 1800 newspapers and 990 magazines. There are also 225 registered foreign television and radio channels [3].

The companies that move along the process of global digital transformation became the market leaders. At the present stage of development, digital society has moved on to the fourth industrial revolution. The turning point can be called 2017 when 50% of the world's population connected to broadband Internet [4]. A McKinsey Global Institute (MGI) study notes that enterprises with greater digital capabilities, which have noticed the potential of artificial intelligence before others, now have higher marginal revenues [5]. In Kazakhstan, many domestic companies have actively begun to engage in the process of digital transformation (DT). According to the digitalization index of business because of the implementation of the Digital Kazakhstan program, it is assumed that the country will rise in global rankings [6].

In the context of the information and technological explosion, all social communities have substantially transformed. In the information society, where, it would seem, information flows create a dense media environment, local groups form that do not intersect with each other. And this stratification is especially acute in the social environment, where the different nature of the appeal to the media gives rise to different types of media behavior. Digital transformation affects all sectors of the economy and individuals. The beneficiaries of the Digital Mine and Digital Field programs are all residents of Kazakhstan. Digitalization of the economy has many benefits: electronic access to public services, improving the Kuality of medical services, the convenience of public transport, reducing crime, road safety, which in general significantly improves the lives of citizens. Therefore, it becomes an urgent task to study the issue of digital transformation in the context of information and technological development, focused on media behavior and media activity of the population of Kazakhstan.

The classic works of David H. Weaver [7], Maxwell J.A. [8,163-181], McCombs [9] examined the use of social science methods by journalists. Researchers undermine that this method is developing within the framework of the dominant humanistic philosophy of professional journalism.

But with the advent of digital technology and the development of digital communication, this multidisciplinary method has moved to a new level of development of science between social journalism and digital business.

Many fundamental publications, which present the issues of digital transformation, are based on the development of new technologies that focus on new business models. Particularly the study by Rogers David offers a methodology for creating digital business models is given, which has been tested by hundreds of executives around the world. Based on case studies of "digital" companies, the author shows: digital business models not only pose no harm to traditional businesses but, on the contrary, present them a new competitive edge [10]. Based on data from the Information Technology Research Center at the Massachusetts Institute of Technology's Sloan School of Management, authors Peter Wyle, Stephanie Warner concluded that digitalization is forcing companies to move from value chains to ecosystems and gain a deeper understanding of end-user needs [11].

With the large-scale transition to the digital dimension of the entire industry, actively introduce the term digital economy. Researchers Alexander Prokhorov and Leonid Konik note that a deep understanding of the digital economy, as well as its foundations and mechanisms, is only at the initial stage [12].

Another emerging area of digital transformation is intellectual architecture and its embedding in space for enhanced interaction (Sparachino). The division of human activity between the real and the digital world and everyday life is characterized by constant access to a huge amount and variety of information and its processing. As traditional construction and architecture companies attempt to include more smart technologies into their creative processes, architecture enters a critical stage. Based on the research, the author argues that intelligent architecture is based on three forms of intelligence: perception intelligence, interpretative intelligence, narrative intelligence. Among those three forms, perception intelligence captures the presence and movement of people in space. Interpretative intelligence is responsible for understanding the actions of people and can make informed assumptions about their behavior. And narrative intelligence provides us with clearly articulated stories, images, and animations taking into account our needs and preferences [13].

The hypotheses of the researchers Nazarov and Kovalev regarding the change in the media of the landscape also play important role. The authors analyzed social implications of digital reading using the concepts of media crowding out and mediation. The results are discussed in the context of the information overload of modern people, the features of new digital generations, which is an integral part of the modern and postmodern personality [14].

Methods. The purpose of this study is to determine the specifics of media consumption of digital technologies of the population of Kazakhstan, as well as to identify media preferences of the adult population.

The objectives of the study are to determine access to the main technical means of communication for the adult population of Kazakhstan, the main channels of information, and to identify and describe active users of various sources of information. Authors also attempt to define and describe media consumption styles, to describe the practices and preferences of the audience concerning Kazakhstan television channels, radio stations, periodicals, the Internet resources, social networks, and messenger services.

Object of study: citizens of the Republic of Kazakhstan older than 18 years.

The research methodology is based on Kuantitative and Kualitative methods: interviewing the middle of the target group and working in focus groups. A selective Kuota of 2,500 respondents made it possible to examine the study area

through the prism of such demographic parameters as gender, age, level of education, ethnic composition, social and professional status of the population, place of residence.

Research result. The results of the study show that the segmentation of the Kazakhstani audience of digital channels of information differs by the style of consumption and media preferences. The first group included areas in which the rural population predominates; the second group includes areas with a higher level of urbanization. The analysis of connection types showed that digital television is entering all regions. Mobile Internet has begun to compete with the wired Internet [15]. It can be concluded that three-Kuarters of all respondents will use three channels in search of additional information: television, informal channels, and Internet resources. For the time being, the tradition of formalized passive perception such as television remains. However, this practice is already starting to break down among the younger population, which pays great attention to new media sources of information such as messengers, social networks and Internet sites. The results of the study can be useful in applied research in media marketing and digital business.

Analysis of the results of the study shows the rating of various sources of information on use and trust in the information disseminated by these sources. It also illustrates the segmentation of the Kazakhstani audience of different channels of information on the style of consumption, features of media preferences depending on various characteristics of respondents, including language preferences. This analysis identifies the characteristics of active and passive audiences of television channels and determines the specifics of media consumption of television media and online media.

The sample size is at least 2500 respondents. The study covers 14 regions (urban and rural settlements) and the 2 largest cities. The sample represents the adult population of Kazakhstan over 18 years old. In the first stage of the study, a mass survey of the population was conducted based on a face-to-face Kuestionnaire. Based on the population of the country, the sample sizes for the regions of Kazakhstan were calculated.

At the second stage of the calculation of the sample, the Kuota principle was applied based on gender, age, and ethnicity based on the technical features of the study. Factors taken into account to remain the demographic structure of the sample were a gender indicator, the age composition of the population, ethnic characteristics, and administrative status. The study also applies a multi-stage sampling method: selection by administrative basis, depending on the population of each region, selection within the administrative district of the city and village of the region.

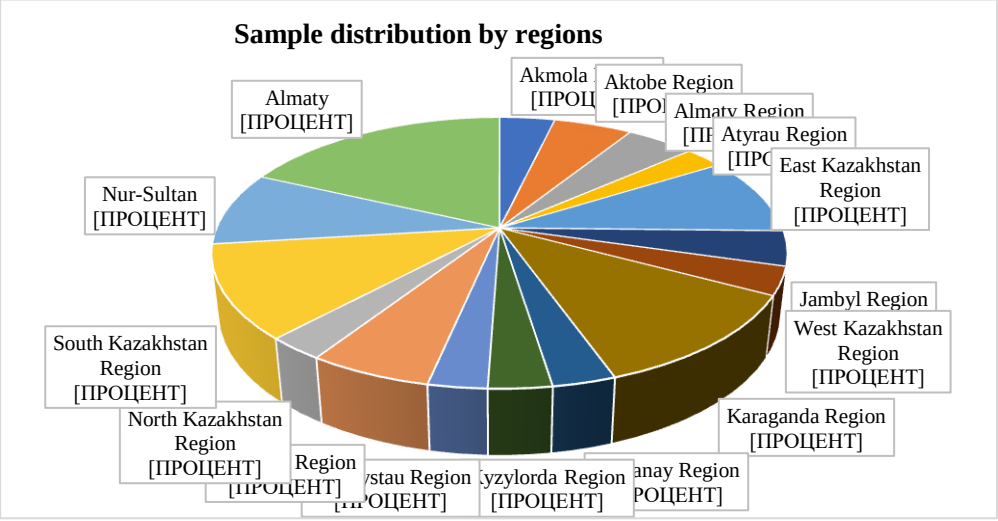

Figure 1. Sample distribution by regions

Figure 1 shows the distribution of the sample by region. The sample design built on the principle that allows each person within the population to have eKual chances to be selected for the study. The size of the general population for January 1, 2015 (the population of Kazakhstan is over 18 years old) is 12 129 737 people. With a sample size of 2500 people, the marginal sampling error will be +/- 2.8% with a confidence interval of 95%. To calculate the marginal error (Δ) of the sample, the formula was used: $\Delta = t\sqrt{((s \wedge 2 (1-n / N)) / n)}$, where s ^ 2 is the variance of the attribute; n is the sample size; N is the volume of the population; t - Student's criterion (confidence coefficient).

Active development of information technology contributes to an increase in the number of communications [16,38-48]. Access to the main technical means of communication influences media activity and the media behavior of the population. During the process of digitalization, both the user audience of the corresponding mass media and the media eKuipment of consumers increase.

According to the survey, a television, a mobile phone, and personal or portable computers are gradually becoming everyday objects. Almost every house has a TV (98%). The share of owners of mobile devices is 76%, and smartphones and tablets are 43%. More than half of the respondents own a personal or portable computer (58%).

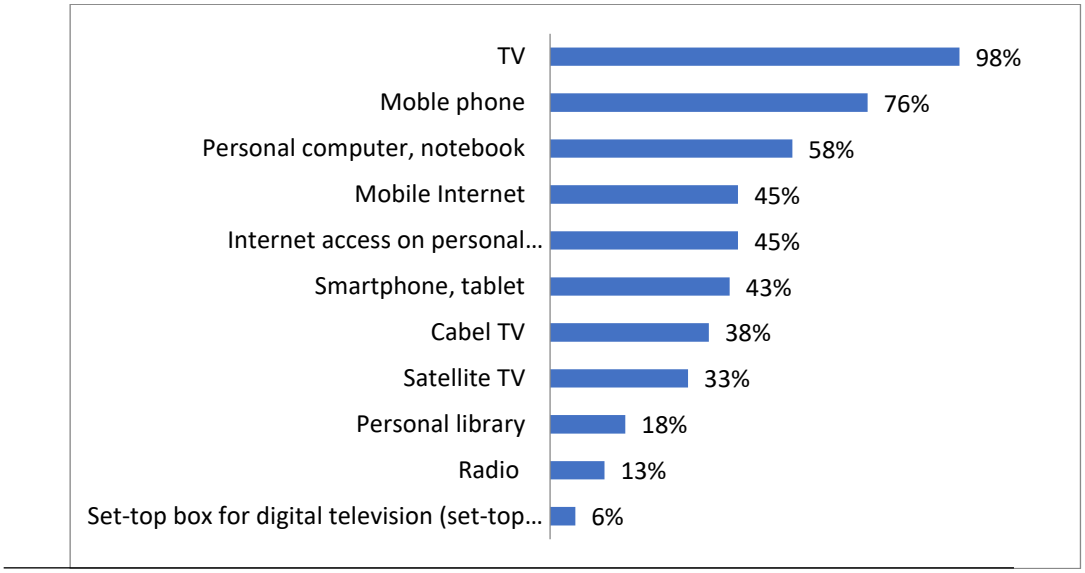

Figure 2. Which of the following devices and services do you own (% of the total number of respondents; unlimited number of answers)

45% of respondents use mobile Internet services. The same number of respondents has Internet connections on desktop computers (45%). One in three of the survey participants uses an alternative television connection. 38% have cable TV connections, another 33% have satellite TV connections. Consoles for receiving digital television are used by 6% of respondents. Compared to the Internet connection and smartphone, the home library and the radio receded into the background. Only 18% of respondents own a personal home library. 13% of respondents have a radio receiver.

Analysis of socio-demographic characteristics showed that the main difference in the media connectivity of households is the issue of having an Internet connection. The mobile phone is in demand in all age categories. Moreover, all age categories have the same cable or satellite connection options. Respondents under the age of 45 are more likely to own a computer or laptop in comparison to the respondents over the age of 45. They also tend to have a home Internet connection. Among younger respondents, the level of mobile Internet connection is 2-3 times higher than in older age groups. Therefore, while among respondents aged 18-24 years old, 62% use mobile Internet, in the group of 55-64 years old this number reaches only 20%. Respondents, older than 45 years, more often than young ones own a personal home library (21%). The individual's financial situation can affect personal connectivity [17]. The greater the financial freedom of the respondent, the more media services he or she can use. We can say that the possession of both fixed and mobile technical eKuipment with an Internet connection is one of the signs of affluence. In groups with incomes above the average, the level of connection to mobile Internet exceeds 50%, and the wired Internet connection exceeds 60%.

A noticeable difference in media connectivity is observed between residents of urban and rural areas. Urban residents often use cable television, whereas the rural population prefers satellite television [18,107]. Residents of cities are more likely to own a computer/laptop (64% versus 48%), and a stable Internet connection (55% versus 30%). Residents of cities are more likely to own smartphones/tablets in comparison to respondents from rural areas (51% versus 31%), as well as connecting to the mobile Internet (50% versus 37%). In rural areas, the level of connection to mobile Internet is higher than to wired Internet (37% against 30%).

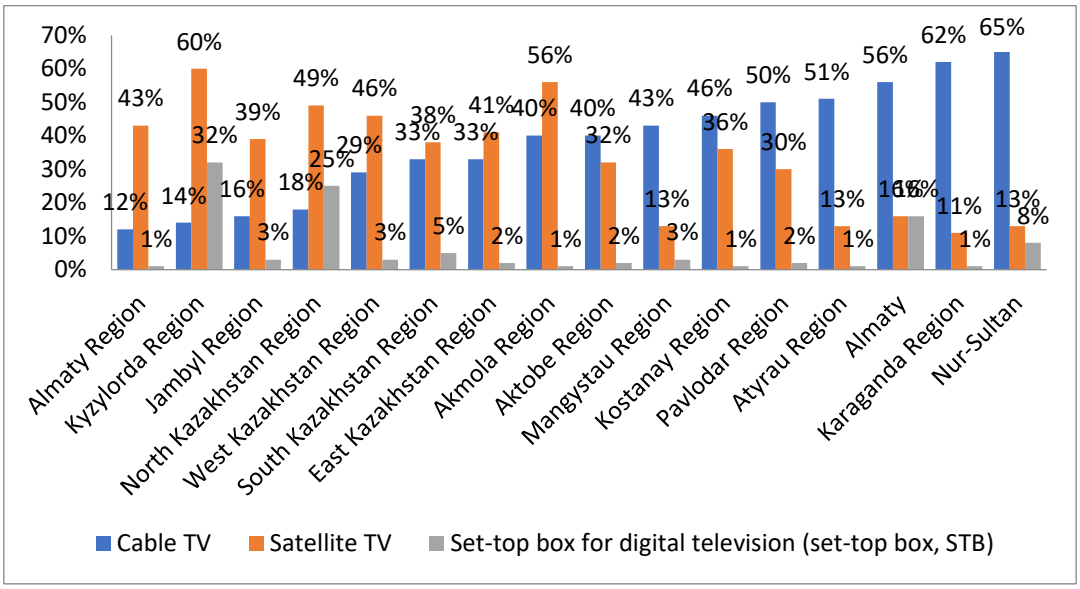

Figure 3. Type of television connection (% in regions; unlimited number of answers)

Of interest is an analysis of the prevalence of types of television services and Internet connections in different regions of Kazakhstan. According to the results of the study, all regions of the country can be divided into two groups according to the dominant type of television connections. The first group with a predominance of satellite type of connection includes four regions of Southern Kazakhstan, as well as North Kazakhstan, West Kazakhstan, East Kazakhstan, and Akmola region. In these regions, satellite connection has a penetration rate from 38% to 60%. The second group with the predominance of cable type of connection includes the regions of Western Kazakhstan (excluding East Kazakhstan region), Kostanai, Pavlodar, Karaganda regions and the cities of Almaty and Astana. All these areas have cable television penetration rate from 40% to 65%. It is noteworthy that the first group mostly includes areas where the rural population prevails, while the second group includes areas with a higher level of urbanization. An analysis of connection types also showed that digital television is entering in all areas. The most successful in this regard today is the Kyzylorda region, North Kazakhstan region, the cities of Almaty and Astana.

The survey showed that the mobile Internet began to compete with the wired Internet. By regions, it can be seen that the mobile Internet prevails over wired in Almaty, Kyzylorda, Atyrau, West Kazakhstan, and South Kazakhstan regions. In Mangystau, East Kazakhstan, Jambyl regions and the cities of Almaty and Astana, mobile and wired Internet are used on an eKual footing. Wired Internet retains leadership in the North Kazakhstan, Akmola, Pavlodar, Aktobe and Kostanay regions.

Discussion. The results of the study showed that the largest segment among the channels of information, from which information about events in the country is usually learned, is occupied by traditional media: television, newspapers and radio. Their total share is 49%. The second position is occupied by the so-called new media, which include Internet sites, social networks and instant messengers. Their total share is 23%. In third place is communication with friends. The share of this segment is 18%.

The share of foreign media, including Russian media, is 10%. According to the materials of focus groups, one of the reasons for using foreign media is open access to them, without registration and payment (for example, Zakon.kz, Kazakhstan Today, Kaztag). The rating of the information sources themselves allows us to draw up a more detailed map of Kazakhstani preferences in obtaining information.

According to the survey, the first place among the sources of information is personal communication with friends. The vast majority of respondents (73%) usually learn information about events in the country from conversations with friends and acKuaintances. Socio-demographic analysis of the results showed that such behavior is characteristic among all population groups. The second most preferred source of information is republican television channels (62%). Most often, this source is addressed by respondents aged between 45-54, low-income people, Kazakhs, from the Kazakh-speaking environment. Third place is occupied by local (regional) television channels. Every second receives information from this source (55%). Most often, this source is used by respondents over 45 years old, with an average income level, with secondary education, from the Kazakh-speaking environment.

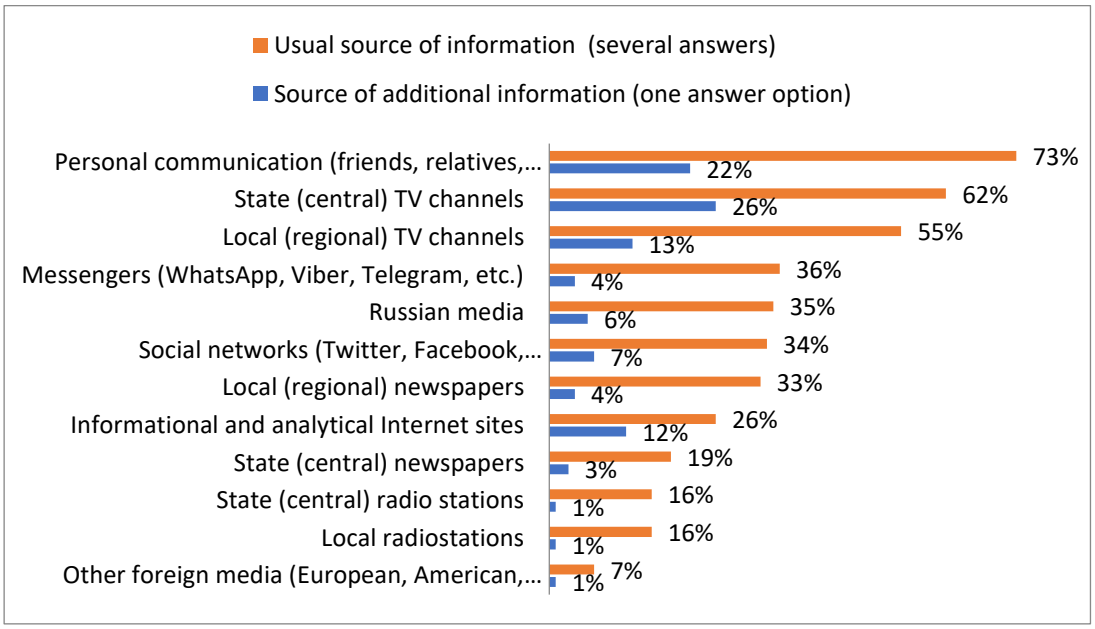

Figure 4. Which source of information do you turn first to check or get additional information about events in the country (% of the total number of respondents; unlimited number of answers.

Several sources occupy the fourth position as the most popular sources of information, the percentage of reKuests for which varies at the level of 30-35%, namely, messengers (36%). Most often, this source is used by respondents aged 18-24 and 25-34 who have higher education, with an average and above-average income, and are fluent in Kazakh and Russian. Among those age groups, social networks are also popular (34%). Russian media also reaches 35%. Most often, this source is used by the Russian-speaking population and representatives of other ethnic groups who have higher education, with income level is above average, aged 45-54 and 55-64 years old. Local (regional) newspapers are in demand among rural residents, aged 45-54 and 55-64, with higher education (33%).

The rating of additional sources of information has confirmed the credit of trust among the population of such channels as personal communication, national and local television [19]. In need of additional information, 26% will turn to the republican television channels, 22% will consult with friends or acKuaintances, 13% will watch local TV channels. It is noteworthy that if, as a regular source of information, information-analytical sites in the ranking took only 8th place, then as an additional source of information they occupy the 4th position (12%).

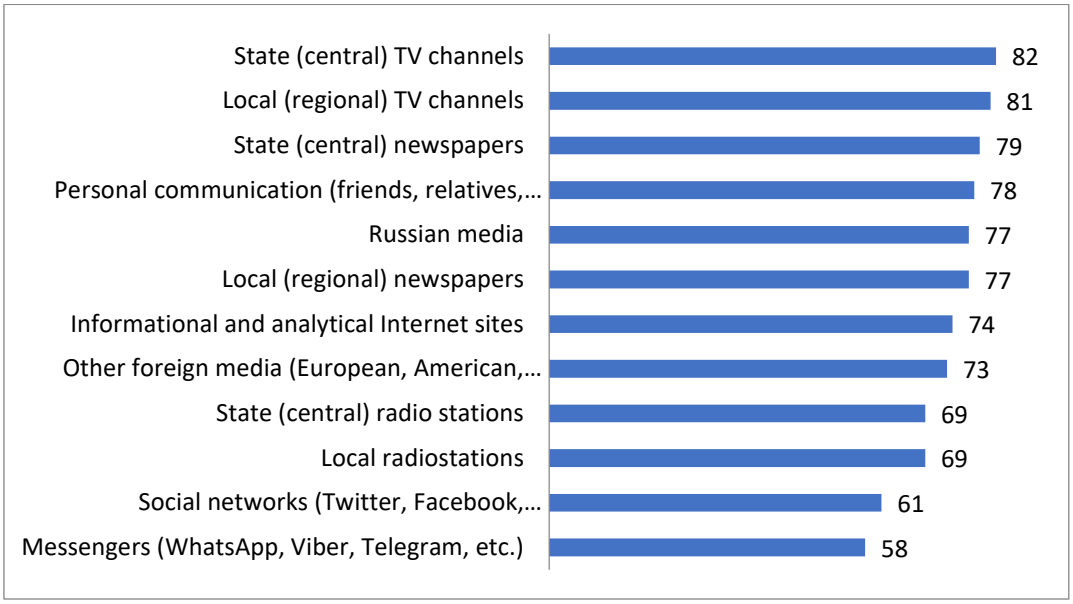

Figure 5. Do you trust the information that is received through those sources from which you usually learn about the events taking place in our country? (% rather trusting the number of users as a source of information)

Study participants noted that Kazakhstani television often lacks information due to its complete absence or insufficient disclosure of the topic, which has to be replenished through the Internet. Thus, we can conclude that three-Kuarters of respondents will use three channels in search of additional information: television, informal channels, and Internet resources.

An analysis of confidence indicators shows that the highest level of confidence in information from these sources is retained by users of such traditional media like television, regardless of broadcasting area (81-82%), and newspapers, despite the trend towards a decrease in the audience (77 -79%). The high level of both use and trust in the information disseminated by such an informal channel as personal communication (78%) is noteworthy. The level of trust in Russian media by their users is fixed at 77%. Among the new media, information and analytical sites have primacy in the level of trust among users - 74%. To a lesser extent than other sources, users trust instant messengers (58%) and social networks (61%).

In general, the authors conclude that the majority of respondents still have tendencies to receive information passively, mainly through television channels. Nevertheless, these practices are changing among groups aged 18-24 and 25-34, who pay great attention to new media sources such as messengers, social networks and Internet sites. When analyzing the level of trust in a particular source of information, it is always necessary to take into account the size of the audience receiving information through this channel. In general, the survey recorded a high level of confidence in the information transmitted by communication channels from their users. This suggests that the trust in received information is one of the factors influencing the formation of preferences when choosing information channels.

In his work, Philippe M. Napoli noted the importance of today's consumers in that they have an unprecedented choice in terms of technologies and platforms that access, produce and distribute media content. The development and duplication of television, the Internet and other media technologies fragment and expand the capabilities of the media audience like never before [20].

One of the objectives of the study was to determine the behavioral characteristics of users when consuming information. Four aspects of behavior were identified, in relation to which people adhere to opposite attitudes and patterns of behavior.

Randomness or selectivity in the choice of information. In this case, we are talking about the fact that when consuming informational content, a person can react to all the news in a row, regardless of their thematic focus, or he uses the principle of selectivity and pays attention only to the news that he currently needs or is interested in. According to the survey, 44.8% of respondents tend to scatter their attention on a wide range of news. Another part of the respondents demonstrates the concentration and purposefulness of their interests (55.2%).

Full trust or doubt in the information. In this case, the main aspect of behavior is confidence in the information. In one case, a person can demonstrate full confidence in the information consumed, without thinking that it can be distorted or even false. And in another case, a person reserves the right, based on experience, knowledge, and intuition, to trust or Kuestion the information received, thereby allowing himself to verify the information if necessary.

The survey showed that the audience divided into two eKual parts. One half (48.4%) of respondents tend to trust information received from TV, radio, and newspapers. The other half (51.6%) approach selectively the issue of trusting information from the media. The analysis of respondents' answers showed that the attitude to the newsmaker is of great importance in the matter of trust.

Verification of information or non-critical consumption of information. Readiness to check and double-check the information to obtain objective data could be a challenging task for the general audience. According to the results of the survey, the audience fell into two uneKual parts: two-thirds of the respondents (63.6%) said they did not have a habit of double-checking information, a third of the respondents (36.4%) were inclined to carry out a reliability check. Regarding the need to double-check the information, most participants of the study are inclined to believe that everything will depend on the conditions. If the information concerns a “hot” topic, for example, like the issue of land, respondents are more likely to check news sources to avoid negative conseKuences. On the other hand, if a person constantly watches the same channel for a long time, the level of trust in particular channels rises. Accordingly, an individual will not have the thought of double-checking the information received through this a reliable channel. Reviews and comments on news published on the Internet are a new source for comparing information. From one source or “wide pool” sources of information. In this case, we are talking about the fact that a person can use many different sources to obtain information, depending on his preferences or other criteria, or be limited to one, at most two, sources.

The survey showed that the audience was divided into two almost eKual parts. 54.9% of respondents seek to use an expanded list of sources of information when consuming news. 45.1%, on the contrary, limit their choice to 1-2 sources.

Conclusion. In Kazakhstan, the coverage of television broadcasting reaches 98%. The level of mobile telephony is 76%. In general, the study showed that every second respondent has free access to the main technical means and services of information transfer: TV, mobile phone, personal computer, mobile and wired Internet. Moreover, in the age groups up to 45 years, the level of media connectivity is higher than in the older age groups. In particular, the level of connections to the mobile Internet for people under 45 is 2-3 times higher than for people over 45. The level of media connectivity including access to the Internet in rural areas is lower than in urban areas. One of the reasons is the lower level of technical eKuipment possession among the population in rural areas. It can be noted that the level of access to

the mobile Internet in rural areas is higher than to wired Internet. Mobile Internet prevails over wired in Almaty, Kyzylorda, Atyrau, West Kazakhstan, and South Kazakhstan regions. The division of the country's regions by type of television connection is distinguished. In the group with satellite connection (8 regions), there were areas in which the rural population prevails, while in the group with cable connection (6 regions and 2 cities), there were areas with a higher level of urbanization.

The rating of preferences of sources for obtaining information is as follows: personal communication with friends (73%); national television channels (62%); instant messengers (36%); Russian media (35%); social networks (34%). Moreover, it is information trust that is one of the factors influencing the formation of preferences when choosing information channels.

At the same time, in search of additional information, three-Kuarters of respondents will use three channels: television, informal channels, and Internet resources. It is noteworthy that groups aged 18-24 and 25-34 years pay more attention to messengers, social networks and Internet sites as sources of information in comparison to older age groups.

The study also reveals a decrease in the level of trust in traditional media due to dissatisfaction with the Kuality and content of information content and its inconsistency with reality can increase the authority of personal communication with friends as a source of information. As a result, in an attempt to be more objective, people are trying to get insider information through informal channels. The level of interest in information about events in the country is moderate. According to the results of the survey, 40% of respondents consider themselves a group who constantly monitor the events in the country. Most of the groups are respondents over 45 years of age with social status and life experience.

According to the results of the study, the following behavioral characteristics of users when consuming information can be distinguished: 55% use the principle of selectivity and pay attention only to the news that they currently need or are interested in; 64% have no habit of double-checking information; 55% seek to use an extended list of sources of information when consuming news. Digital transformation in Kazakhstani society provides new opportunities and a competitive environment in the field of media and communication. The results of the study showed that the digital transformation determines the pace factor and its development by the level of media eKuipment of non-population, which determines the basics of media behavior and media activity in Kazakhstan.

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