MEDIA USE IN THE MIDDLE EAST 2015

A Six-Nation Survey

NORTHWESTERN
UNIVERSITY
IN QATAR

Northwestern University in Qatar was founded in 2008 by parent organization Northwestern University in Evanston, Illinois, in partnership with Qatar Foundation. NU-Q draws on Northwestern University's distinguished schools of communication, journalism and liberal arts to educate students for leadership positions in the rapidly evolving global media industry. As part of its active role in the development of a 21st century knowledge-based economy in Qatar, NU-Q engages in research, thought leadership and service relevant to Qatar, the Middle East and the global community.

MEDIA USE IN THE MIDDLE EAST 2015

A Six-Nation Survey

Conducted by:
Everette E. Dennis, Justin D. Martin, and Robb Wood
Northwestern University in Qatar
In association with Harris Poll

NU-Q has made data from this survey publicly
and easily accessible in a custom-built interactive
platform that allows both professionals and
casual users to explore the results by nationality,
demographics, and attitudinal variables.
Find the interactive and the online report at

mideastmedia.org

TABLE OF CONTENTS

INTRODUCTION

Tracking people's use of and attitudes about the media in the Middle East is a systematic means of understanding the region itself that goes beyond news headlines and subjective commentary. How people use media—and what they think about them—offers insights about the social and political climate itself as well as the state of freedom of expression.

Since 2013, Northwestern University in Qatar has conducted survey research on media use in the region to better know, appreciate, and work with these vital social institutions. This annual study, conducted in January and February 2015, is the third such effort by NU-Q. As a school that educates communication, journalism, and media professionals, it is our obligation to "know the territory" within which we teach and study. Moreover, how people use media in everyday life, and what they think of their relationship to society and government, is a barometer for assessment with useful cues for charting change. Such intelligence is vital in an era of massive media disruption in which the online digital world has challenged and surpassed what we now call legacy media.

Of course, the whole concept of media keeps changing with the flurry of new social and digital media in which any person can be a communicator with less "mediation" of what they do, see, and create. Between 2013 and 2015, the media landscape globally and in the Middle East changed significantly, with new players and brands now being used by our respondents.

NU-Q's second media use study in 2014, tracked entertainment media in the context of changing use of leisure time in the internet era, thus broadening our view of media and people in the region. Now with a commitment to long term media tracking or longitudinal studies, we present the latest findings in this series: *Media Use in the Middle East, 2015.*

As with the 2013 study, this project contributes to the World Internet Project and adds to that global effort by ensuring that the Middle East is not skipped over as in many other multinational research projects, and by providing points of comparison with other parts of the world. And this time, our work is generously funded by the Qatar National Research Fund, in addition to our own resources. We have excluded countries like Syria and Iraq where the ability to conduct survey research is difficult to impossible. However, in probing media use in Egypt, Tunisia, Saudi Arabia, Lebanon, the United Arab Emirates, and Qatar, we examine large and small countries from North Africa to the Gulf, some that are quite stable, some more turbulent; media-rich and media-poor with different regimes and degrees of freedom of expression and media regulation.

We recognize, of course, that the mood in any country is conditioned by current developments there and in the region. With roiling civil wars in Syria and Yemen, the high profile of ISIS (Islamic State of Iraq and Syria), with its barbaric beheadings of journalists and humanitarian workers, and dustups among some GCC members, many factors affect media habits, attention span, and attitudes. Within the realities of access and funding, we've tried to present a representative picture where norms across the region can be compared with data from each country. Thanks to an interactive website, users of this study can do their own probes and comparisons.

This is rapid-response research, something rarely attempted by academic institutions, in which we frame our study, settle on emphasis and questions, then go immediately into the field in the six countries, gathering data, analyzing it and preparing it for publication in less than four months. We are concerned with fresh information, and in connecting that information to the academic and professional media communities, as well as others, with dispatch. Changes in the field suggest that this is necessary to avoid perishable information. At the same time, we recognize that radical changes over a two year period are not likely, so it is the incremental contours of the study that tell the story of new developments. Even subtle changes, however, can be instructive as they will likely affect tens of thousands, if not millions, of viewers and users, not to mention the economic impact and social consequences that a small movement of the media metric dial can have.

This study has a trove of new data, some analyzed here, and some that will benefit from the secondary analysis of others who are welcome to use these findings.

Some of our findings are striking and might seem counterintuitive, while others are not remarkable on the surface, but can signal stability or subtle change that is important. Especially notable in the 2015 study is that most people access the internet on their phones rather than by laptop or desktop computers. That is true in every country in our sample except Egypt, where an ailing economy has slowed the adoption of new technologies common elsewhere in the region and most dramatically in the Gulf states of UAE and Qatar. In a few short years, people now spend more time on the internet than any other media, including the all-powerful television and radio (the most popular media worldwide). The gap between the internet and other media grew from 2013 to 2015. Another dramatic change since 2013 is that the internet application WhatsApp has soared in use as some 93% of those in the study send direct messages compared with 84% who use e-mail, which is clearly losing ground.

In 2013, we reported that respondents across the Arab world said the quality of news reporting in their country had improved in the aftermath of the "Arab Spring". Perhaps, we thought, that the massive coverage of the uprisings and regime changes by local and international media might be the cause. This time, results were more mixed. When asked whether "the quality of news reporting in the Arab world has improved over the past two years," people in Egypt, Tunisia, and the UAE said it had not, while those in Lebanon, Qatar, and Saudi Arabia were affirmative. At the same time, watching news and commentary was eclipsed by viewers who prefer comedy, thus suggesting a modest, but important, migration from hard news. The equation grows more complex as the study shows that belief in the statement "news media in your country are credible" is on the rise. Overall these data suggest more discerning readers who attest to credibility of news, but they are still not satisfied with the trajectory of change and improvement in a region not known for quality journalism.

As in other countries, Arabs are sensitive about how their country and the region is portrayed in international news coverage, especially now that major networks like Al Jazeera, BBC, CNN, and many others from Iran, Russia, and China broadcast in the region. By and large, people in the region believe that international news coverage of their country is either favorable or fair while the belief that they are "biased against" varies widely. Countries where there is more turmoil seem to have less confidence in international media, as witnessed in Lebanon, Tunisia, and Saudi Arabia, while tiny percentages in Qatar and UAE assert that global media are "biased against" them. This will seem ironic to close observers of elite attitudes toward international news coverage in both countries where international incidents and controversies about labor issues and the World Cup (in Qatar) have driven negative news coverage in major outlets such as *The Guardian* and *the New York Times.* While the leaders in both countries may seethe about such coverage, most Qatari and Emirati citizens don't agree: just 7% in Qatar and 3% in UAE lament negative bias against their country. Why this is so deserves a deeper dive and analysis than quantitative data can provide. Whether citizens agree with the tone and nature of international coverage of their country, or simply don't watch or care, is not known.

The state of support for freedom of expression, a central feature of multiple Arab uprisings, seems to have cooled somewhat across the region; where in 2013, 59% agreed that people should be able to express their ideas on the internet, "even if they are unpopular," the figure dropped to 52% in 2015. Only in the UAE and Qatar were slight increases reported. Decreases of 10 and 20 percentage points were reported in Saudi Arabia and Tunisia, respectively, while declines in Egypt were modest and Lebanon was flat. At the same time, support for internet regulation has dropped since 2013 while people still worry about "government checking what I do online." It is possible that the latter concern is related to a wave of cybercrime laws that have been enacted across the region, some with draconian provisions that prohibit the spreading

of negative news about a country, even if it is true. These laws have been widely publicized, as have some high profile prosecutions in Saudi Arabia, UAE, and Egypt.

In a region so long constrained by authoritarian governments and wary of media intrusions, the rise of social media is truly remarkable. But since these disruptive social media were instigators of action in Arab uprisings, some of whose victories have gone south, it is understandable that unfettered freedom is sometimes met by caution and pulling back. That is true globally, too, including in the West where cybercrime laws and concerns about children, sex, and violence also lead to support for more regulation.

This study is not meant to take sides or push political agendas, but simply to report on what the citizens and residents think about their media— and how they use them. "Their media," however, are no longer confined within national borders, but extend everywhere and embrace almost every form and source of human communication. This study, those that preceded it, and those to follow represent our institutional appointment at NU-Q and our commitment to report what we see for our students, colleagues, media industries, government ministries, institutional leaders, leaders, and anyone interested.

We are ever grateful to our colleagues at Harris Poll, especially Kerry Hill, David Krane, Nira Colonero, and Adam Gross, who have not only orchestrated the fieldwork, but have been invaluable participants in the year-round conversation about how we collect and report these data. We are proud to have worked closely with Column Five Media since 2013 on the survey website, including the signature element of the report, an interactive display of the findings, that has made these data accessible and useful to academics, policymakers, industry professionals, and the general public.

My thanks to the Qatar National Research Fund and its National Priorities Research Program for their support, as they accorded this project one of their highest and most competitive awards,

selected by outside referees. I am grateful to my colleagues Justin Martin and Robb Wood who do the lion's share of the work on this project over many months. Special thanks to Najwa Al Thani, a member of NU-Q's Class of 2015 who has been a research assistant on this project. And always, this work would not go forward without the interest and support of members of the NU-Q community—students, faculty and staff.

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OVERVIEW

Media Use in the Middle East, 2015, is the third iteration of an annual study by Northwestern University in Qatar that studies media use and cultural and political attitudes in Arab countries. More than 6,000 respondents across six Arab countries were selected and interviewed via randomized sampling procedures, constituting nationally representative samples in Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates.

The 2015 survey replicated many questions asked in 2013, so for the first time in the life of this project, we are able to see how things have changed over a two-year period. As in any longitudinal study, the historical context in which the data were collected should be considered. Examples in our case would include the intensity of political turmoil in Egypt and Tunisia in 2013, and the death of Saudi Arabia's King Abdullah bin Abdulaziz in 2015, which occurred approximately two weeks before our fieldwork began.

With that historical context in mind, we do see significant changes not only in how people use media, but also in attitudes toward related cultural and political issues. Our interactive interface displays these changes with clarity and precision, allowing the reader to explore and discover results customized to any specific interest. It is available to anyone interested in making their own discoveries in these data.

Among the findings that stood out was a strong and consistent rise in the number of respondents who said they thought their country was headed in the right direction: between 2013 and 2015, agreement with this statement went from 42% to 64% in Egypt, and 27% to 42% in Tunisia. Saudi Arabia was the only country in which this number decreased (from 79% to 67%), but responses to this question may have differed prior to the death of King Abdullah just weeks before. Notably, cultural conservatives are far more likely to say their country is headed in the right direction than progressives (57% vs. 35%), while cultural progressives are far more likely than conservatives to say their country is on the wrong track (54% vs. 33%).

Along with region-wide optimism about national progress came a general decline in comfort with individual political expression. Support for the idea that people should be able to criticize governments on the internet also fell, and remains the lowest among all nations as reported by the World Internet Project in recent years.

This report explores how diverse countries in a volatile region are turning toward national media, content shared via social media networks, and the Arabic language, and distancing from pan-Arab news and English language content:

• Saudis are twice as likely to say international news is biased against their country vs. toward it (38% see bias against, 17% toward), with similar views in Lebanon (48% see bias against, 26% toward); in the Gulf nations of Qatar and UAE, more say their countries are recipients of favorable bias than negative bias (in Qatar, 19% see bias toward vs. 7% against, UAE 48% vs. 3%, respectively).

• Perceived credibility of national news media rose 5 percentage points since 2013 (39% to 44%), and the belief that media in their country can operate independently without interference from officials rose 7 percentage points (35% to 42%). At the same time, 6 percentage points fewer saw improvements in the quality of reporting in the Arab world (56% to 50%).

• Use of media in English has decreased among all age groups, especially on the internet; fewer people (by 8 percentage points) say they use English to access the internet (41% to 33%).

Findings may reflect a general desire for stability among people in the region who have seen the Arab uprisings go increasingly sour, alongside resilient, connected, and politically empowered online cohorts:

• Egypt, the most politically tumultuous of the countries surveyed, is the only country in which there was an increase in support for tighter internet regulation among the total population (42% to 49%).

• People don't necessarily think the "democratizing" effect of the internet is a good thing: nationals who think online activity can increase political influence are 12 percentage points more likely to want tighter regulation of the internet (62% vs. 50%).

• Those who consider the internet a source of political empowerment may still be exercising that power, as they are more active on social media (13 percentage points more likely to post on social media daily: 71% vs. 58%) and are 18 percentage points more likely to share news content on social media than those who don't (68% vs. 50%).

The report contains a wide range of new information about the changing nature of social media use in the region:

• Facebook and Twitter users each declined by around 5 percentage points, while Instagram users more than quadrupled.

• The direct messaging service WhatsApp is not only the most used social media platform in most countries surveyed, it has been adopted in equal numbers across all age groups.

This report, Media Use in the Middle East, 2015, *is a collaborative institutional effort led and directed by Northwestern University in Qatar. The project team benefits greatly from the contributions of faculty, students, and staff. We also benefit from the expertise and cooperation of collaborating institutions. Harris Poll conducts fieldwork and data management under our direction, while also offering helpful consultation on a variety of topics throughout the many stages of the project. The data visualization firm Column Five Media worked intensively with NU-Q and Harris Poll to build not only the report's website, but also the custom interactive platform that has made findings widely accessible, engaging, and we hope, useful.*

FREEDOM OF SPEECH AND POLITICAL EMPOWERMENT

Those who consider the internet politically empowering are more likely to support free speech, share news, and be concerned about government surveillance online

In this chapter

- Support for freedom of expression online falls in Tunisia and Saudi Arabia, unchanged in other countries

- Those who see internet as politically empowering share more news online

- Online surveillance by governments concerning to those who believe internet is politically empowering

Support for freedom of expression online falls in Tunisia and Saudi Arabia, unchanged in other countries

Support for freedom of speech online dropped in Saudi Arabia and Tunisia

Percent who agree: "It is okay for people to express their ideas on the internet, even if they are unpopular"

2013
2015

	KSA	Lebanon	UAE	Qatar	Egypt	Tunisia	Average
2013	74%	61%	59%	57%	48%	57%	59%
2015	64%	61%	61%	58%	45%	37%	52%

Base: Nationals Only
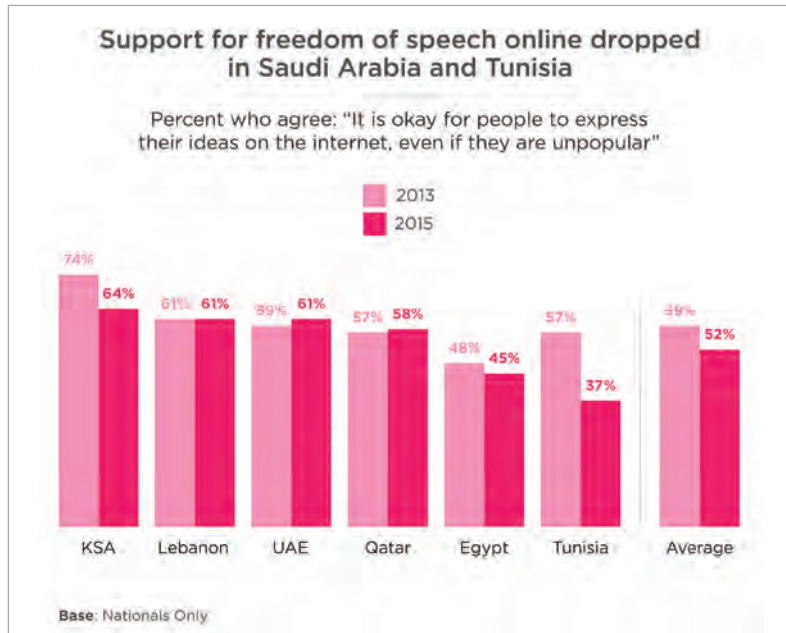
Support for free expression online remains unchanged since 2013 in Lebanon, Qatar, UAE, and Egypt. An "average" drop in support for free expression online was mostly due to significant drops in Tunisia, where residents are still witnessing the re-establishment of social and political order after a tumultuous revolution, and in Saudi Arabia, where their king had died only weeks before this survey's fieldwork began.

Most respondents who use the internet post messages and comments on social media, repost links and content generated by others, search for news content, and share news with others online. Despite the internet being an important communication tool for many, most nationals believe there should be limits to online expression. Support for the idea that people should be able to criticize governments online fell in Saudi Arabia, Tunisia, and UAE.
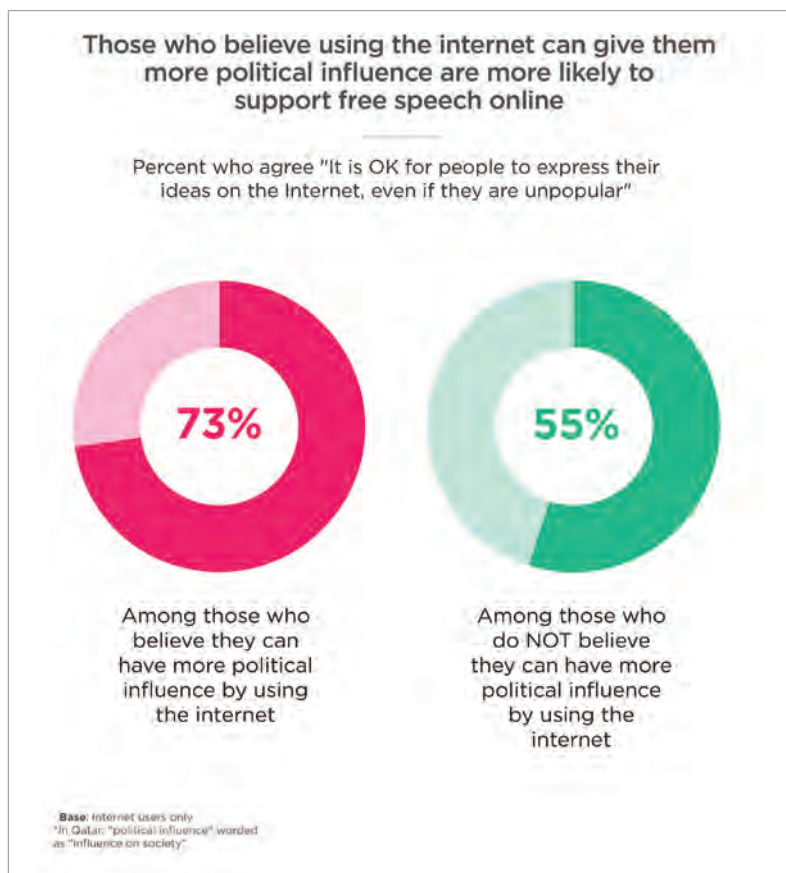
Supporters of freedom of expression online are more likely to believe they can have political influence by using the internet (54%), compared to those who disagree with freely expressing ideas online (33%). They also worry more about government surveillance (44% vs. 28%), although this does not appear to have curtailed their internet activity.

Those who believe using the internet can give them more political influence are more likely to support free speech online

Percent who agree "It is OK for people to express their ideas on the Internet, even if they are unpopular"

73%
Among those who believe they can have more political influence by using the internet

55%
Among those who do NOT believe they can have more political influence by using the internet

Base: Internet users only
*In Qatar: "political influence" worded as "influence on society".

Support for tightening internet regulation increased in Qatar, Egypt and UAE; decreased in Lebanon, Saudi Arabia and Tunisia

Percent who agree: "The internet in my country should be more tightly regulated than it is now"

2013
2015

	Qatar	Lebanon	Egypt	Tunisia	KSA	UAE
2013	50%	63%	42%	51%	58%	29%
2015	67%	54%	48%	44%	42%	35%

Base: Nationals Only

Support for freedom of expression online rises with level of education

Percent who say it is OK for people to express their ideas on the internet, even if they are unpopular

Primary or Less	Intermediary	Secondary	University or Higher
27%	45%	58%	65%

Base: Nationals Only

A narrow majority of nationals (52%) agree that it is OK for people to express their ideas on the internet, even if these ideas are unpopular. This represents a decline from 59% in 2013. A plurality say people should be free to criticize governments online (44%), while about one in four (24%) disagree. Saudis and Tunisians, in particular, show a decline in support for freedom of expression over the past two years.
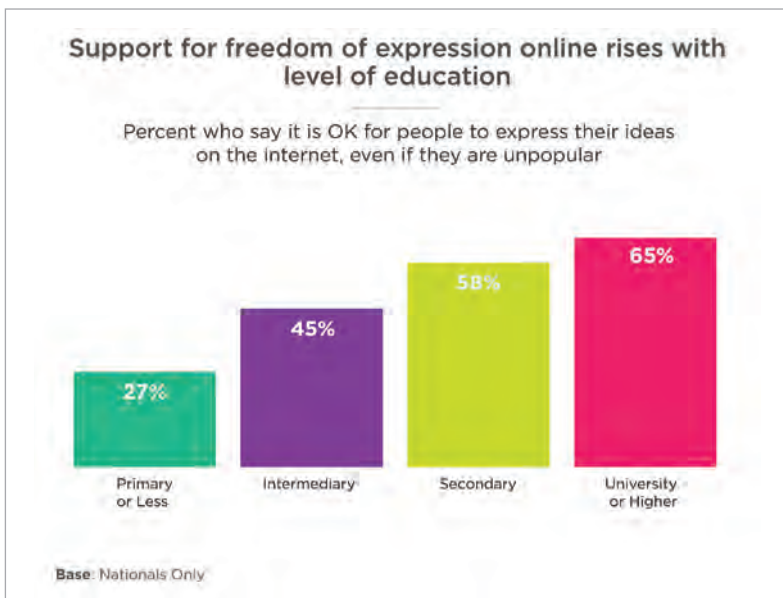
Arab nationals are concerned about what is advisable to do online. About two in five nationals feel comfortable saying what they think about politics (39%), down slightly from 44% in 2013. Additionally, fewer than half (45%) think it is safe to say what one thinks about politics, compared with 48% in 2013. Since 2013, Egyptians' and Tunisians' comfort talking about politics has sharply declined (43% in 2013 vs. 33% in 2015 in Egypt), (44% in 2013 vs. 34% in 2015 in Tunisia). Tunisians, along with Saudis, are also less likely to believe it is safe to talk about politics online compared to two years ago (58% in 2013 vs. 49% in 2015 in Saudi Arabia), (46% in 2013 vs. 37% in 2015 in Tunisia).

Forty-eight percent of nationals feel the internet in their country should be more regulated than it is now. Desire for more regulation varies from 67% in Qatar to 35% in the UAE. Half of the surveyed countries support more internet regulation compared to 2013 (Egypt, Qatar, and UAE), but support decreased in the other half (Lebanon, Saudi Arabia, and Tunisia).

Younger nationals, who spend more time online in general, express substantially more support for freedom of speech online than the oldest age group (60% for 18-24; 38% for 45 and older). They are also more likely to support freedom to criticize governments online (49% vs. 34%) and to believe candid expression of political opinions and beliefs online is safe (51% vs. 34%).

Those who see internet as politically empowering share more news online

People who feel the internet increases their political influence share more news content online

- Share news content via social media
- Share news content via direct message
- Share news content via email

Among those who believe they can have more political influence by using the internet

55%	32%	14%

Among those who do NOT believe they can have more political influence by using the internet

|	
39%	22%	7%

Base: Internet users only
*In Qatar: "political influence" worded as "influence on society"

Belief that the internet increases political influence falls in Egypt, Qatar and UAE; largely unchanged in other countries

Percent who agree: "People like me can have more political influence by using the internet"

- 2013
- 2015

	KSA	Egypt	Qatar	Tunisia	Lebanon	UAE
2013	55%	59%	56%	39%	37%	36%
2015	53%	52%	51%	43%	35%	19%

Base: Nationals only; internet users only
*In Qatar: "political influence" worded as "influence on society"

People who say that being online can give people like them more political influence are more supportive of freedom of expression, including the right to criticize governments online (59% vs. 37%) and to express unpopular ideas on the internet (73% vs 55%). They are also more likely to share news content.

There is a close association between the belief that the internet can provide greater political influence and support for free expression online. While support for online free expression is more common among those who believe the internet can increase political influence, and the reverse is also true: belief that the internet can provide greater political influence is more common among those who support online free speech.

Belief that the internet allows for more political influence fell among nationals in Egypt, UAE, and Qatar, but held steady in Lebanon, Saudi Arabia, and Tunisia.
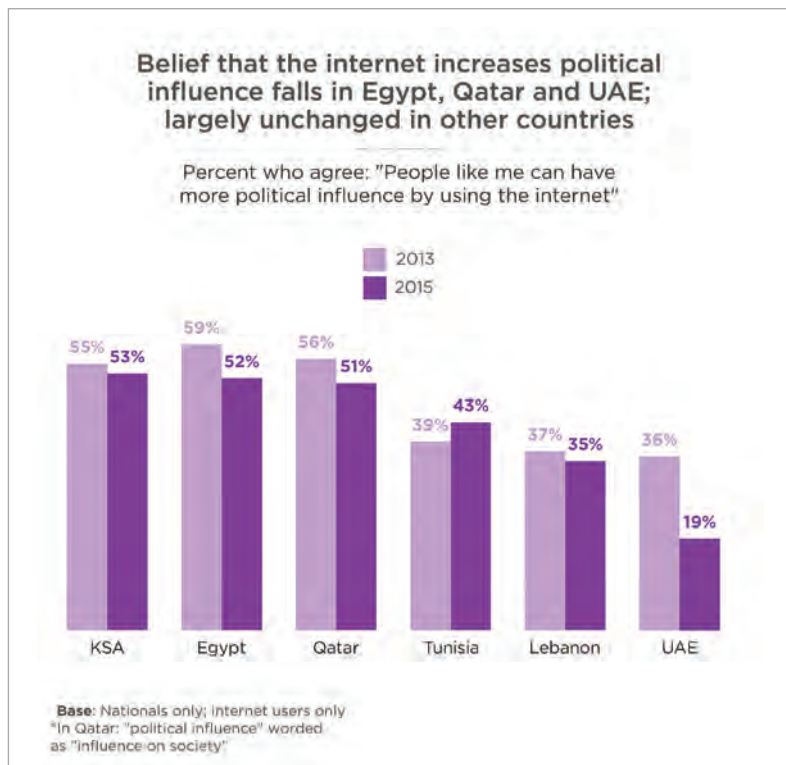
Nationals who believe the internet allows them political influence are more likely than those who don't to say it has also increased their contact with those who share similar political views (59% vs. 26%). Progressives are more likely than conservatives to believe in the internet as a tool of political empowerment (50% vs. 43%)

Online surveillance by governments concerning to those who believe internet is politically empowering

Worry about online government surveillance more common among those who feel the internet increases their political influence

■ Those who feel internet increases political influence
■ Those who do NOT feel internet increases political influence

Percent who agree: "I am worried about governments checking what I do online"

26%

47%

Base: Internet users only
*In Qatar "Governments" worded as "powerful institutions"
*In Qatar "political influence" worded as "influence on society"

Active social media users and heavy news users worry more about government surveillance online

Percent who agree: "I am worried about governments checking what I do online"

■ Social Media Activity
■ News Consumption

41% — Post once or more a day
34% — Post less than once a day
46% — Follow news closely
36% — Follow news somewhat
28% — Do not follow news closely

Base: Internet users only
*In Qatar: "Governments" worded as "powerful institutions"

Sizable minorities worry about governments and companies checking their online activities (38% each), a figure unchanged since 2013. Adults in Saudi Arabia worry most about government surveillance (47%), while Egyptians and Lebanese are generally less concerned (26% each). Qataris and Tunisians express more concern about government surveillance in 2015 than they did two years ago.

Concerns about government surveillance of online activity appear correlated to support for citizens' freedom of speech and political efficacy. Those who feel the internet offers political empowerment tend to worry about governments checking their online activities, as are those who want more internet regulation.

People active on social media, posting comments or messages on a daily basis, worry more about government surveillance than those who are not active on social media. Similarly, those who pay close attention to news worry about surveillance. Those who worry about governments watching their online activities are also more likely to share news content online than those who don't (70% vs. 51%).
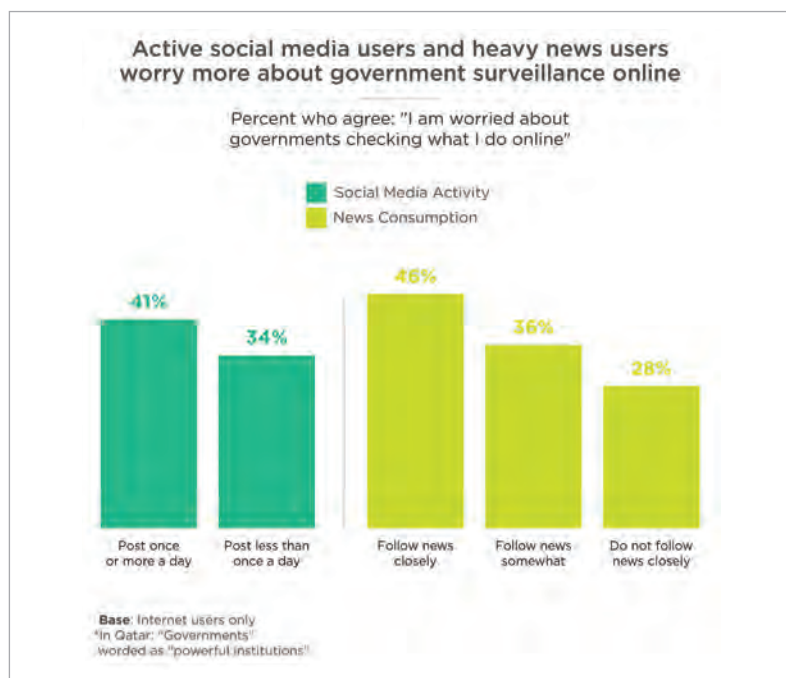
Non-Arab expatriates, particularly those from Asian and western countries, worry more about government monitoring of their online activities than nationals. Arab expats are equally unlikely to be concerned about online surveillance by governments. Arab countries' reputation for being among the most censorial in the world, whether true or not, may lead non-Arab expatriates to have an inflated fear of government surveillance than Arabs themselves.

DISCUSSION:
Freedom of Speech and Political Empowerment

Comfort with political expression dropped most in post-revolutionary countries. The two countries most affected by the Arab uprisings, Egypt and Tunisia, saw the biggest drops in individuals who said they felt comfortable expressing their political opinions. Tunisia had the biggest drop in respondents who said it is safe to say whatever one thinks about politics; in Egypt, authorities did not allow the question to be asked at all.

More Qataris and Tunisians worry about governments checking their online activity in 2015 than two years ago. A new omnibus cybercrime law was introduced in Qatar in 2014 which allows criminal prosecution for online defamation, even if the offending speech is true, and prison sentences for the vaguely-defined offense of harming, "principles of social values" with online speech. Prior to 2011, Tunisia's online government surveillance and censorship was among the strictest in the world. It is therefore curious that Tunisians are increasingly concerned about online monitoring.

A belief that the internet can increase one's political influence fell in Egypt, Qatar, and the UAE. Continued government persecution of online rights activists in Egypt since 2013 may have had a chilling effect on beliefs of the internet's political utility. Qatar instituted a cybercrime law in 2014 with formidable criminal penalties for online dissent, and the UAE enhanced enforcement of a cybercrime law in 2012. In March 2013 (at least a month after our survey fieldwork was conducted that year), 94 political activists in the UAE were put on trial in a much-discussed ordeal in Abu Dhabi.

SOCIAL MEDIA

Sharing information and connecting online nearly universal

🔖 **In this chapter**

- Social media ubiquitous, more used than email

- WhatsApp leads the direct messaging revolution

- As a source of news, social media trailing only TV and internet in importance

- Those less comfortable expressing political opinions less likely to use social media

- Women spend at least as much time socializing online as they do in person; not so with men

Social media ubiquitous, more used than email

More people send direct messages than check email

93%

Percent who send
direct messages
at all

84%

Percent who
check e-mail at all

Base: Internet users only

Instagram exploded in popularity between 2013 and 2015; use of Facebook and Twitter fell

Percent using social media platform

2013
2014
2015

Facebook
88%
89%
83%

Twitter
45%
48%
40%

Instagram
8%
24%
28%

Base: Nationals, internet users only
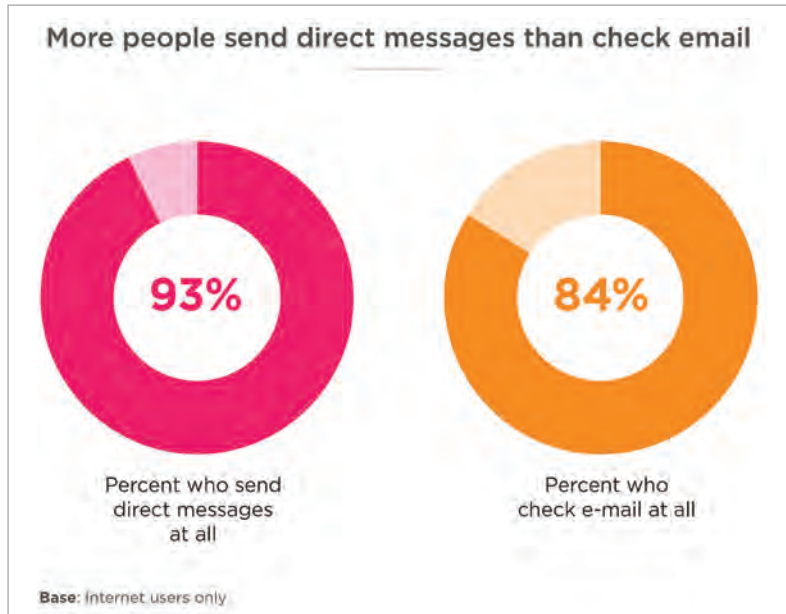
Social media have become almost synonymous with the internet in the Middle East. Nearly all internet users (95%) use legacy social media or direct messaging; this finding is uninfluenced by nationality, gender, or age. Staying connected and constantly "checking in" pervades Arab culture, as demonstrated by nearly eight in ten (79%) using social media or direct messaging at least once a day. Furthermore, nearly seven in ten (69%) use the internet daily with the express purpose of learning the latest happenings and events from friends and family, often checking in multiple times a day.

Use of social media has surpassed other activities on the internet; people use social media far more than they look for news (55% daily) or download or stream videos (40% daily). Moreover, direct messaging is the more likely tool used to connect with others compared to email, among other activities online.
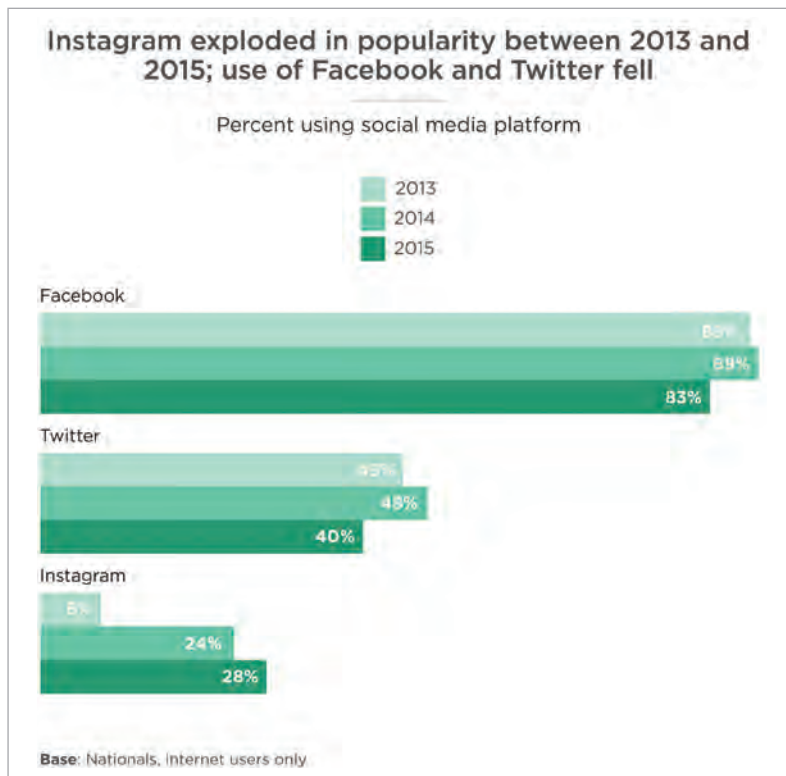
Facebook remains one of the more dominant social media platforms by a wide margin among nationals who use the internet, although usage has declined since 2013. Use of Twitter and Google+ has also waned, while Instagram has risen sharply in popularity, particularly among younger adults.

The sphere of what might be considered "social media" is expanding, as people increasingly turn to instant and direct messaging services.

WhatsApp leads the direct messaging revolution

Top 3 social media platforms per country, by percent used

WhatsApp more popular than Facebook in most countries

- Facebook
- WhatsApp
- YouTube
- Viber
- Instagram
- Twitter
- Skype

Egypt: 97%, 87%, 81%, 70%, 58%, 49%
Lebanon: 89%
Qatar: 94%, 62%, 52%
KSA: 91%, 86%, 81%
Tunisia: 58%, 52%
UAE: 100%, 88%, 73%

Base: Nationals, internet users only
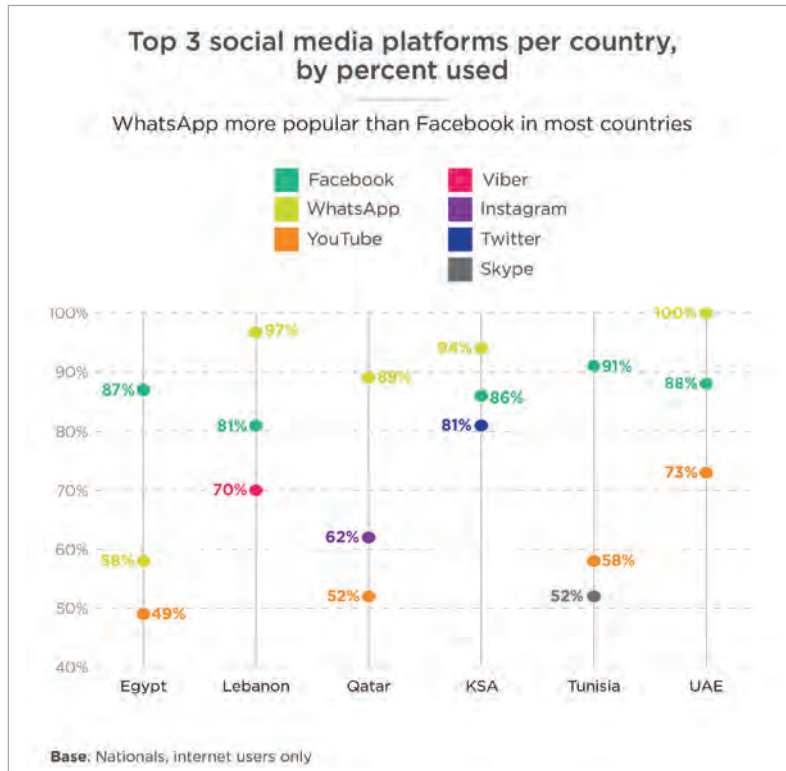
Facebook and WhatsApp are the dominant social media platforms in the region, both sites used by more than three in four respondents. High use of these platforms is consistent regardless of gender or age. WhatsApp has become nearly ubiquitous in UAE, Lebanon, Saudi Arabia, and Qatar. WhatsApp is less common in Egypt and Tunisia, where Facebook is the dominant social media platform.

Younger adults spend more time online than older adults, and perhaps consequently are more likely to use multiple social media platforms. WhatsApp, though, crosses generational divides and exhibits robust popularity among all age groups.

Unlike other social media, direct messaging use similar across generations

Percent who use each social media platform, by age group

	WhatsApp	Viber	Facebook	Youtube	Twitter
18-24	75%	45%	87%	58%	45%
45+	75%	38%	70%	40%	25%

Base: Nationals, internet users only

1 in 3 direct messages is sent to a group list

- Groups
- Individuals

Percent of direct messages sent to...

32%
68%

Percent who belong to following message groups

Friends and family
83%

News & Information
30%

Hobby/Interest
22%

Work/Professional
19%

Religious/Spiritual
13%

Base: Use direct messaging

Text messaging has traditionally been a form of personal, one-on-one communication, but direct messages are also used to communicate with larger groups of people, thus expanding its appeal as a form of social media. Approximately one-third of direct messages (sent or received) are among groups. Almost six in seven belong to a direct messaging group, primarily friends and family, and three in ten belong to news-related direct messaging groups. Lebanese direct messaging users are the least likely nationals to belong to a group (67%), contrasted with 96% of Emiratis who belong to at least one direct messaging group. Younger and older adults use group messaging similarly.

As a source of news, social media trailing only TV and internet in importance

Younger adults are far more likely to rely on the internet - especially social media - for news and information

Percent who say source is important for news and information

■ 18-24
■ 45+

	18-24	45+
Social Media	75%	40%
Internet	84%	52%
News Apps	55%	37%
Newspaper	40%	47%
TV	73%	86%
Radio	40%	55%

Base: All respondents

People who feel the internet increases their political influence are far more likely to share news content online than those who don't

Percent who share news content online

68%
Those who feel internet increases their political influence

48%
Those who do NOT feel internet increases political influence

Base: Internet users only
*In Qatar: "political influence" worded as "influence on society"

Social media are not used strictly for socializing; respondents see social media as important sources for news and information (62%). However, there are clear reservations about the reliability of information on social media and direct messaging (46% and 45%, respectively, consider reliable). By comparison, roughly two in three consider TV a reliable news source and just under half consider newspapers reliable. The extent to which social media are used for news and information is strongly correlated to age. Younger adults are much more likely to rely on social media as an important source of news and information (75% 18-24 year olds vs. 40% 45 and older) and are more likely to consider it reliable (53% vs. 30%).
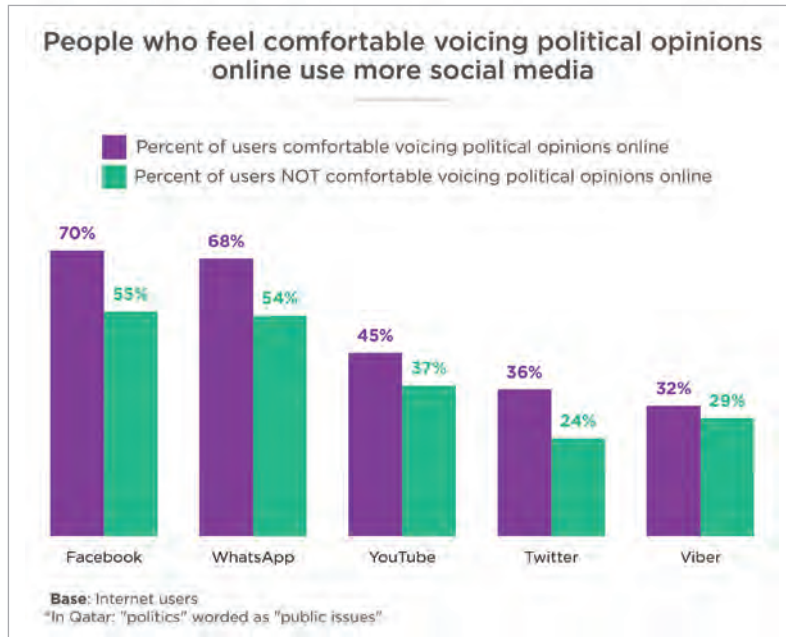
Only a handful of social media users in the region are "passive" internet users who do not post. Nine in ten post messages or comments, repost content generated by others or share their original multimedia content (89% each). Younger social media users are more active than their older counterparts; nearly all (95%) ages 18-24 post messages or comments on social media compared to 76% of those ages 45 and up.
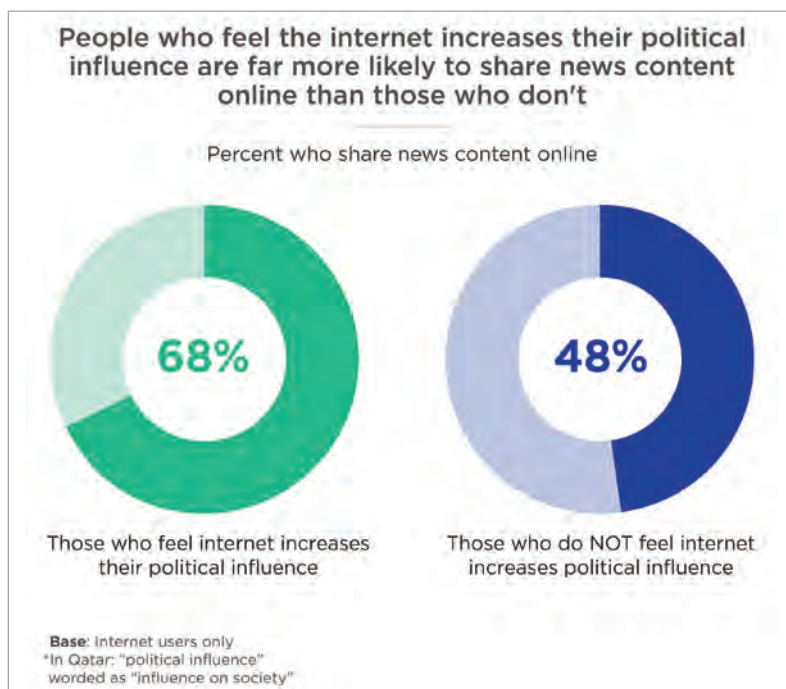
Not only are people sharing personal content, they also use social media to disseminate news. Six in ten (60%) nationals share news content online, and nearly half (49%) do so via social media. However, sharing news varies widely within the region; about three in four in Egypt and Saudi Arabia share news content while only one in three Qataris share news content online.
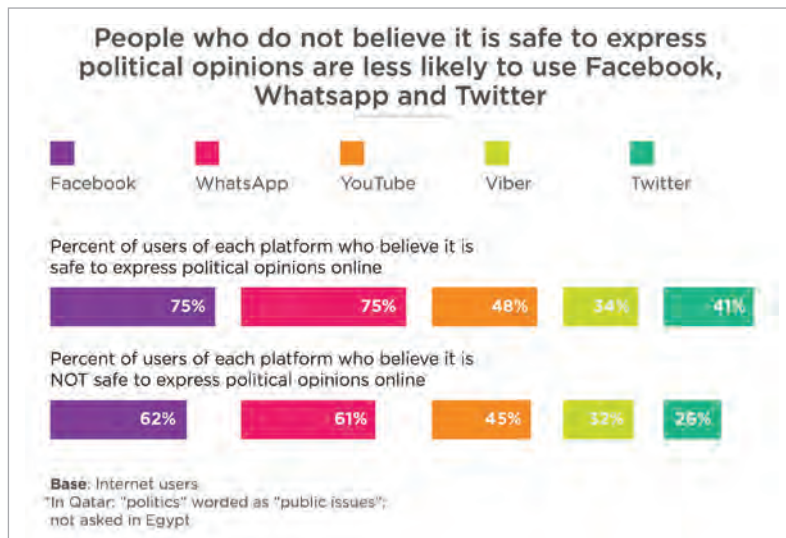
Forty-seven percent of internet users in the region feel increased personal political influence through their internet use. Those who feel politically empowered by the internet are significantly more likely to share news content than those who don't.

Those less comfortable expressing political opinions less likely to use social media

People who feel comfortable voicing political opinions online use more social media

- Percent of users comfortable voicing political opinions online
- Percent of users NOT comfortable voicing political opinions online

	Facebook	WhatsApp	YouTube	Twitter	Viber
Comfortable	70%	68%	45%	36%	32%
NOT comfortable	55%	54%	37%	24%	29%

Base: Internet users
"In Qatar: "politics" worded as "public issues"

People who do not believe it is safe to express political opinions are less likely to use Facebook, Whatsapp and Twitter

- Facebook
- WhatsApp
- YouTube
- Viber
- Twitter

Percent of users of each platform who believe it is safe to express political opinions online

Facebook	WhatsApp	YouTube	Viber	Twitter
75%	75%	48%	34%	41%

Percent of users of each platform who believe it is NOT safe to express political opinions online

Facebook	WhatsApp	YouTube	Viber	Twitter
62%	61%	45%	32%	26%

Base: Internet users
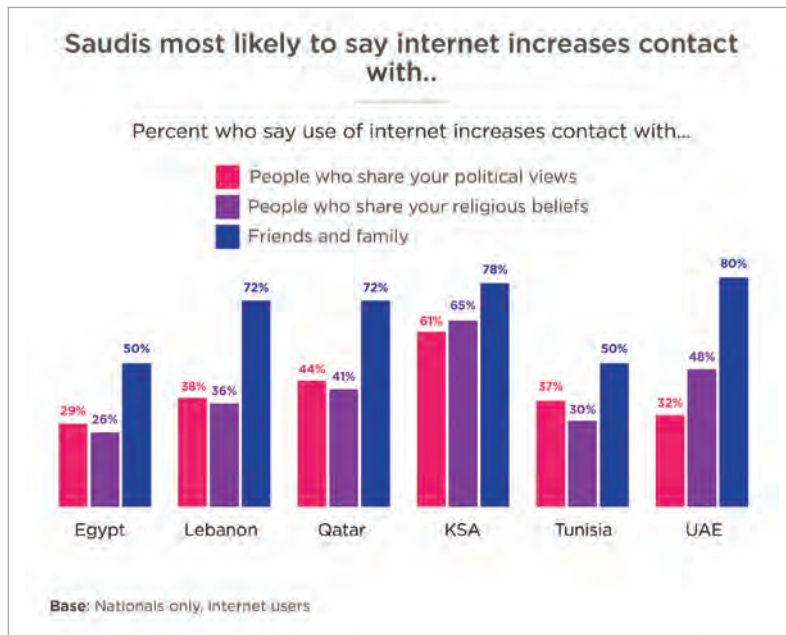"In Qatar: "politics" worded as "public issues";
not asked in Egypt

Many in the region feel the internet is an effective amplifier of one's political opinions. Those comfortable discussing politics in general and who feel it is safe to say what they think about politics on the internet generally are more likely to use social media platforms. However, attitudes appear to be associated only with the level of use of these services, and not necessarily preferences for one platform over another. Regardless of respondents' support for political freedom of speech, WhatsApp and Facebook remain the most popular services.

Despite their daily use of social media, many internet users express concerns about government surveillance of their online activities. One-third of respondents who use the internet (35%) worry about governments checking their online activities. Users of multiple social media platforms, especially Twitter, are more likely worried about governments checking their online activities than non-users, yet this does not appear to curtail their use of social media.

Women spend at least as much time socializing online as they do in person; not so with men

Saudis most likely to say internet increases contact with..

Percent who say use of internet increases contact with...

- People who share your political views
- People who share your religious beliefs
- Friends and family

Egypt: 29%, 26%, 50%
Lebanon: 38%, 36%, 72%
Qatar: 44%, 41%, 72%
KSA: 61%, 65%, 78%
Tunisia: 37%, 30%, 50%
UAE: 32%, 48%, 80%

Base: Nationals only, internet users

Men spend more time socializing with friends face-to-face than online; women more evenly split

Percent of time spent socializing with friends

- Online
- Face-to-face

Men: 56%, 44%
Women: 48%, 52%

Base: Nationals only, internet users

Nearly sixty percent of nationals who use the internet say it increases their contact with friends and half say they have more contact with family (59% and 50%, respectively). The internet increases contact with people who have similar political and religious beliefs according to four in ten respondents (41%).

Saudis are most likely to say the internet positively impacts their contact with others, especially those with similar interests. The perception of increased social contact due to the internet is less pronounced among Egyptians and Tunisians.

Arab nationals spend considerable time socializing online. On average, nationals spend about 12 hours per week interacting online with friends, and another seven hours interacting with family. Younger adults, ages 18-24, spend more than twice as much time socializing with friends online than those 45 and older (15 hours vs. seven hours). The younger segment also socializes with friends more offline (17 hours vs. 12 hours). Both age groups, though, spend similar amounts of time with family online (seven hours for younger adults and six for older adults), but older adults are slightly more likely to socialize in-person with family (27 hours for younger adults vs. 31 for older adults).

Women spend a greater percentage of their time socializing with friends online, while men spend more of their time socializing in person.
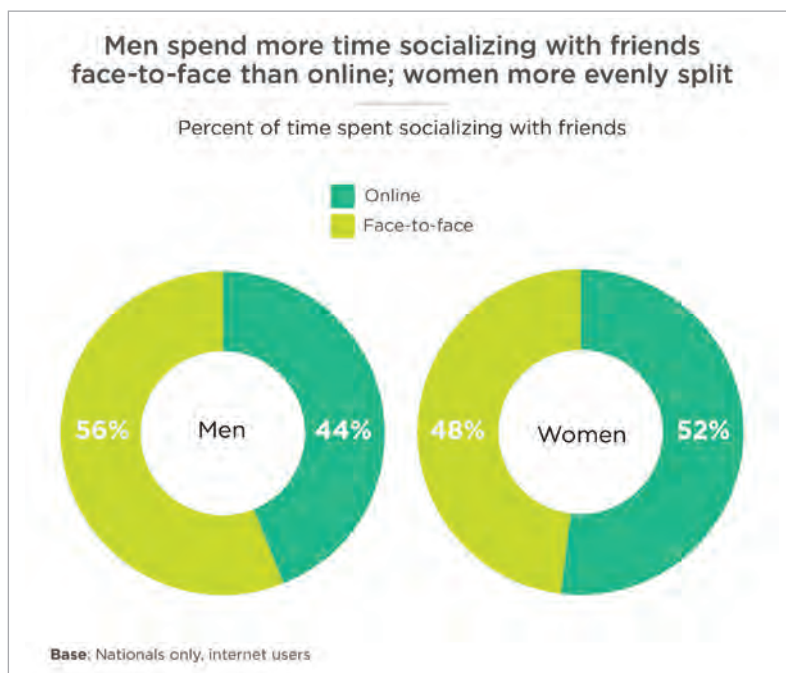
DISCUSSION:
Social Media

Frequent users of social media give higher ratings to news media - a sign of discernment? Respondents cite social media as an important source of news but express reservations about the quality of the information. As social media contain content of all sorts, including professionally produced journalism, amateur material that goes viral, as well as personal information and hearsay from friends and family, it is problematic to consider platforms such as Facebook, Twitter, or WhatsApp a single source. The quality of the information one receives via social media is largely dependent on the associations made by the individual user. People who use social media the most rate the credibility of news media significantly higher — perhaps a sign that sourcing good information on social media is as much a skill as it is elsewhere.

Fear may thwart social media use. Social media use is positively associated with both a support for freedom of expression and a belief that using the internet can be politically empowering. At the same time, those who say they are not comfortable voicing their own political opinions are less likely to use social media. Similarly, those who say it is not safe to express political opinions are less likely to use social media.

Women report spending a greater portion of their time socializing with friends online, while men tend to socialize with their friends more in person. It may be worth considering the norm in some Arab countries, particularly the Arab Gulf, that encourages women to spend less time in the public sphere, while groups of men will gather in cafes and plazas.
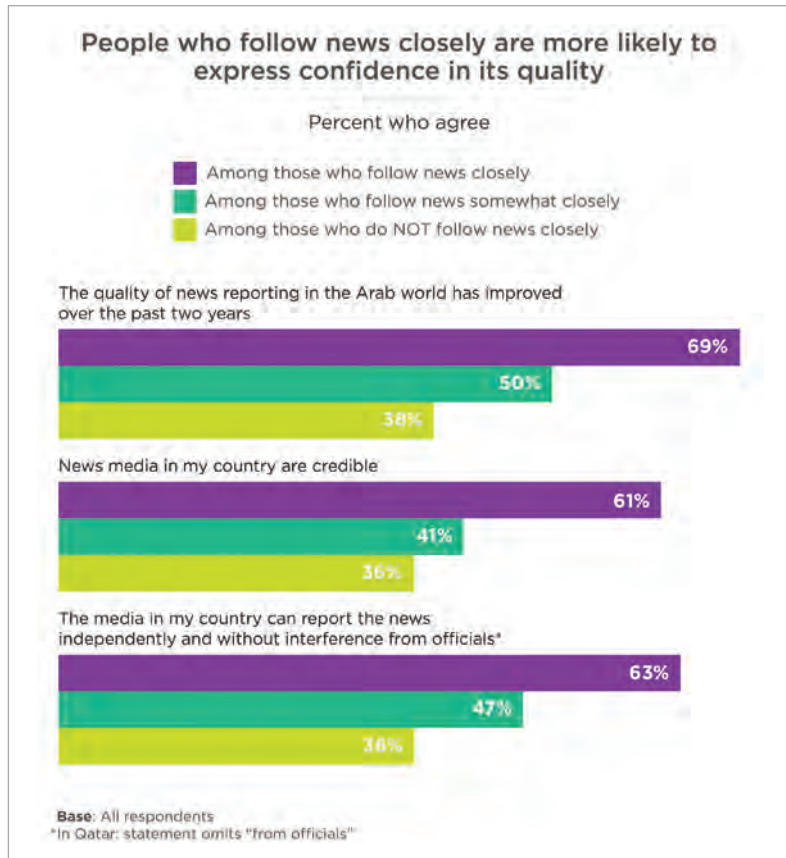
CREDIBILITY OF NEWS MEDIA

Trust in media holds steady across the region, while more choose national over pan-Arab news

🔖 **In this chapter**

- General trust in mass media holds steady

- Credibility of national media rises amid lower marks for news reporting in the Arab world

- Following news from foreign organizations seen as beneficial, except in Egypt

General trust in mass media holds steady

People who follow news closely are more likely to express confidence in its quality

Percent who agree

- Among those who follow news closely
- Among those who follow news somewhat closely
- Among those who do NOT follow news closely

The quality of news reporting in the Arab world has improved over the past two years
- 69%
- 50%
- 38%

News media in my country are credible
- 61%
- 41%
- 36%

The media in my country can report the news independently and without interference from officials*
- 63%
- 47%
- 36%

Base: All respondents
*In Qatar: statement omits "from officials"

University graduates just as likely to trust mass media as less educated

Percent who have trust in mass media

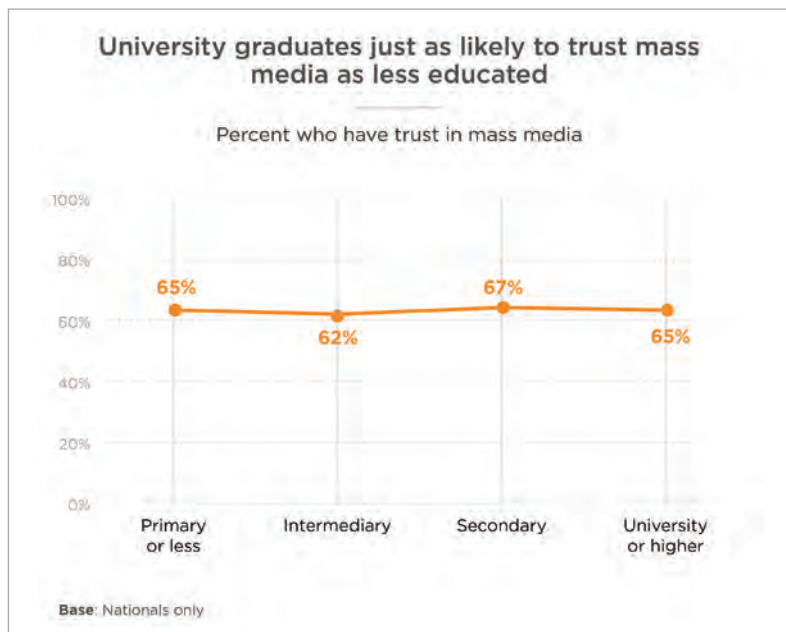|	Primary or less	Intermediary	Secondary	University or higher
	65%	62%	67%	65%

Base: Nationals only

Despite concerns about media independence and credibility in some countries, this study finds adults in the Arab countries surveyed are generally trusting of news media. Respondents believe the news media strive to report news fairly and accurately. Overall, nearly seven in ten say they have trust and confidence in mass media to report the news fully, accurately, and fairly (69%). Nearly all nationals in the UAE express trust in mass media (91%); those in Lebanon are more skeptical than others but still generally trusting (53%).

Overall trust and confidence in media correlates to perceptions of news media in each country. Those who feel their national media can report the news independently without interference from officials also have more trust and confidence in the accuracy and objectivity of the mass media (78%, vs. 52% who don't think their media are independent).
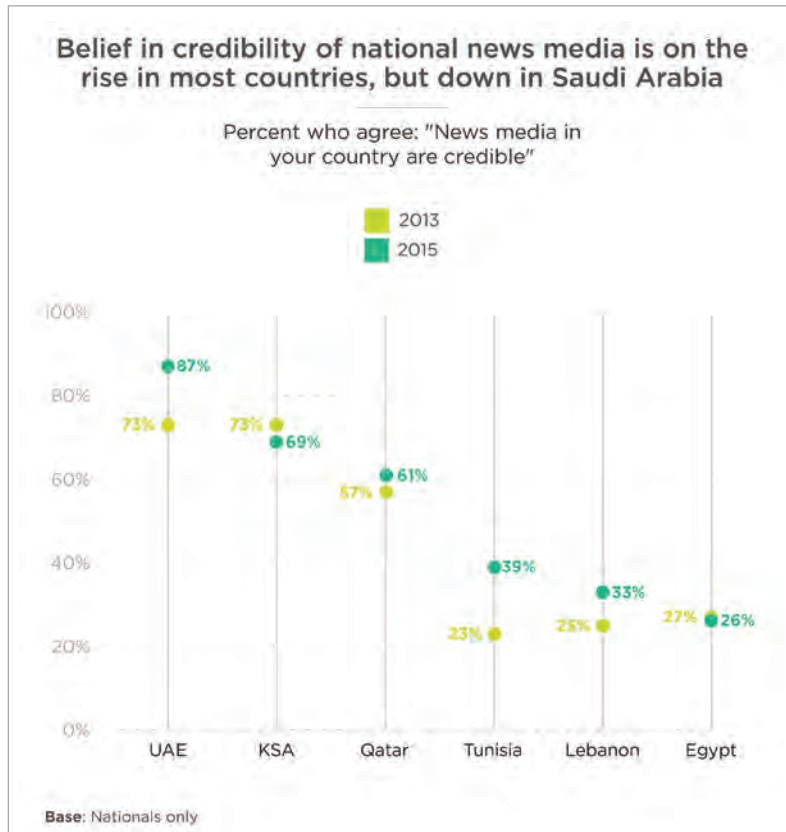
Adults who pay more attention to news are more likely to express confidence in the general quality of news media.

Most adults desire comprehensive reporting from the news media, reporting both positive and negative aspects of society. Two in three believe it is OK for news organizations to report about problems in society (66%), a sentiment expressed by majorities in all countries. Those who follow the news closely are more likely to say it is OK to report about problems in society than those who don't (81% vs. 51%).

Another consistency in the general trust of mass media is a lack of variation between education levels. Approximately two thirds of the uneducated, university graduates, and all levels in-between, trust mass media.

Credibility of national media rises amid lower marks for news reporting in the Arab world

Belief in credibility of national news media is on the rise in most countries, but down in Saudi Arabia

Percent who agree: "News media in your country are credible"

■ 2013
■ 2015

- UAE: 73% (2013), 87% (2015)
- KSA: 73% (2013), 69% (2015)
- Qatar: 57% (2013), 61% (2015)
- Tunisia: 23% (2013), 39% (2015)
- Lebanon: 25% (2013), 33% (2015)
- Egypt: 27% (2013), 26% (2015)

Base: Nationals only

Fewer people in Egypt, Saudi Arabia and Qatar say the quality of news reporting in the Arab world is improving

Percent who agree: "The quality of news reporting in the Arab world has improved over the past two years"

■ 2013
■ 2015

- Egypt: 50% (2013), 34% (2015)
- KSA: 84% (2013), 72% (2015)
- Qatar: 62% (2013), 52% (2015)
- Tunisia: 47% (2013), 43% (2015)
- Lebanon: 44% (2013), 49% (2015)
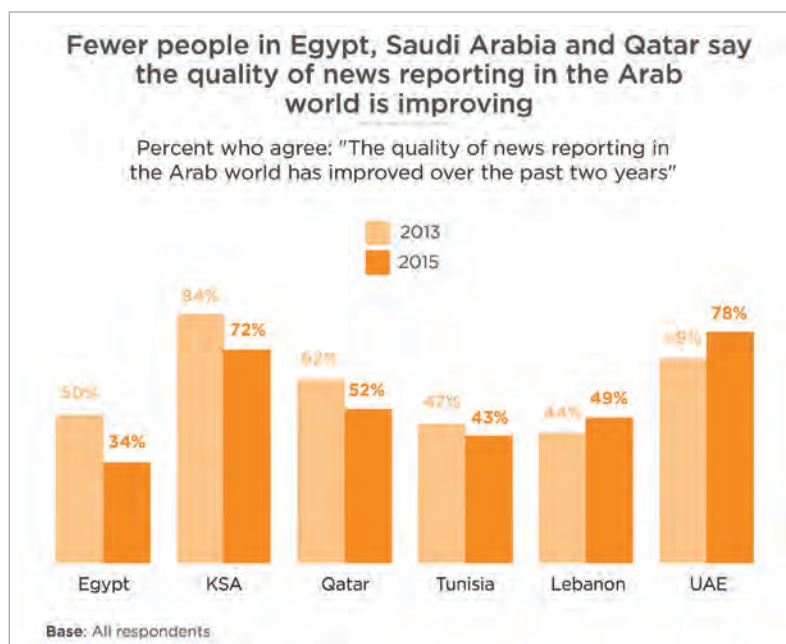- UAE: 9%(?) (2013), 78% (2015)

Base: All respondents

Opinions about the quality of national news media vary widely among countries surveyed. Nationals from the Gulf states (UAE, Saudi Arabia, and Qatar) tend to have a more positive opinion of their media: the majority say the news media in their country are credible. In contrast, those in Egypt, Lebanon, and Tunisia express less confidence in their national media, with fewer than half agreeing that news media in their country are credible. Older individuals have more trust in the credibility of media than their younger compatriots. This difference, perhaps, is related to a greater level of interest in news.

Nationals in most countries perceive national media to be more credible in 2015 than in 2013. There are two notable exceptions to this finding: perceptions of media credibility remained low in Egypt and declined in Saudi Arabia.
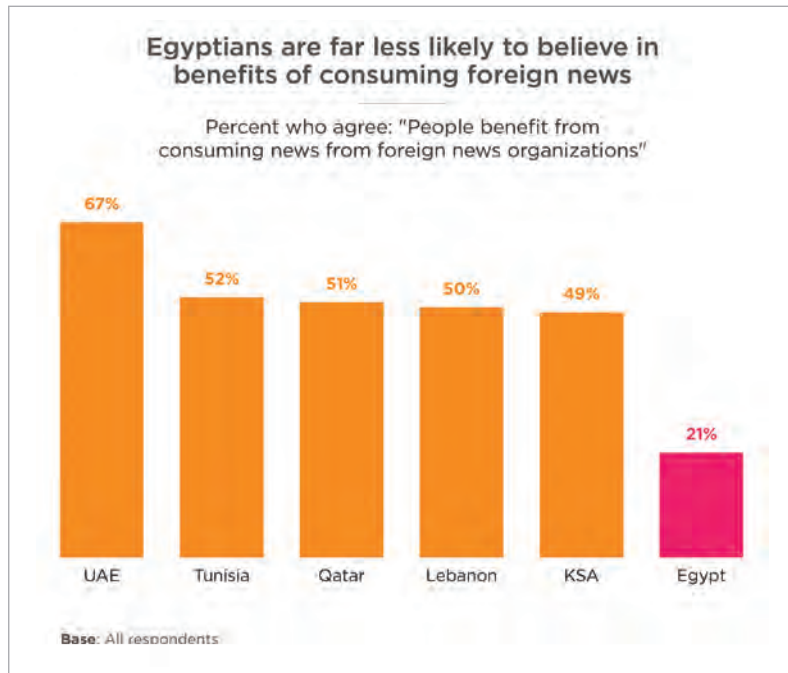
As with credibility, perceptions of media independence also vary across countries. Nationals in the Gulf states tend to believe media in their country can report news independently without interference from officials (72%, 57%, and 57% respectively in UAE, Saudi Arabia, and Qatar). Those in Egypt, Lebanon, and Tunisia, on the other hand, express more concern about government interference in news reporting. Less than half of nationals in these three countries feel news media can report the news independently (25%, 33%, and 46% respectively).

Independence and credibility are related: nationals who believe news media in their country can report without interference from officials are much more likely to find news media credible (74%, vs. 16% for those who don't believe news media are independent).

Perceptions of the quality of news reporting in the Arab world vary considerably. Most nationals in the UAE and Saudi Arabia feel the quality of news reporting in the Arab world has improved over the past two years, a finding consistent with more positive opinions of their own news media. Comparatively, a third of Egyptians surveyed feel regional news quality has improved, a sharp decline since 2013. There has been a decline in perceptions that the quality of news reporting in the Arab world has improved in four of the six surveyed countries.
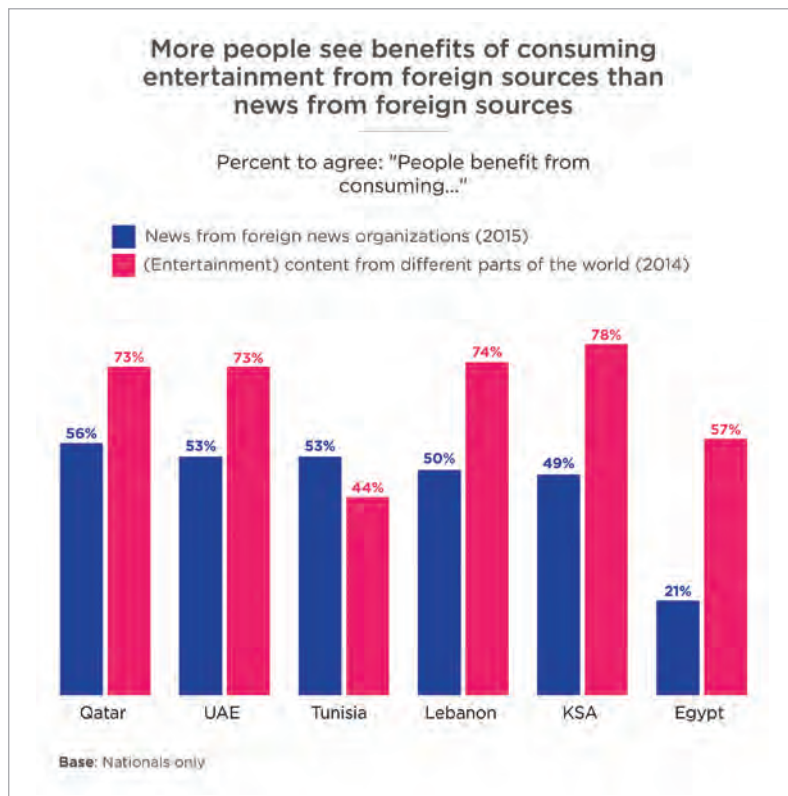
Following news from foreign organizations seen as beneficial, except in Egypt

Egyptians are far less likely to believe in benefits of consuming foreign news

Percent who agree: "People benefit from consuming news from foreign news organizations"

UAE	Tunisia	Qatar	Lebanon	KSA	Egypt
67%	52%	51%	50%	49%	21%

Base: All respondents

More people see benefits of consuming entertainment from foreign sources than news from foreign sources

Percent to agree: "People benefit from consuming..."

- News from foreign news organizations (2015)
- (Entertainment) content from different parts of the world (2014)

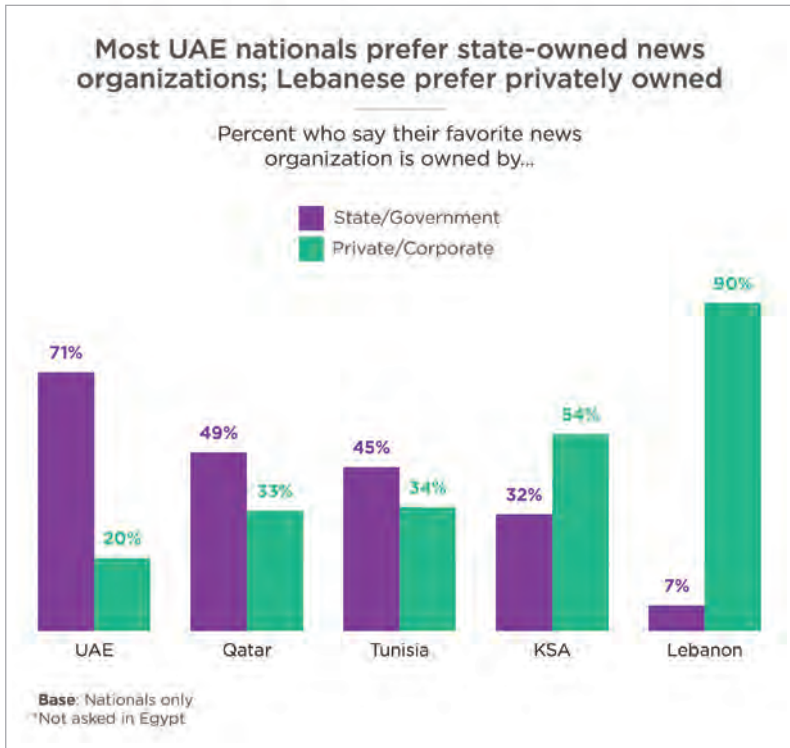|	Qatar	UAE	Tunisia	Lebanon	KSA	Egypt
News (2015)	56%	53%	53%	50%	49%	21%
Entertainment (2014)	73%	73%	44%	74%	78%	57%

Base: Nationals only

Six in ten nationals surveyed follow news in their country closely, with 43% following regional and 34% following international news closely. Saudis are the most likely to follow regional and international news closely (62% and 50%, respectively), while Egyptians show less interest (27% and 16%, respectively). More men are interested in regional and global news than women, while adults under 25 express less interest in news generally. Those who travel outside the Middle East are more interested in international news (50%, vs. 31% of those who do not travel outside the region).

About half of nationals feel there is a benefit from consuming news from foreign news organizations, while one in five Egyptians agree. Those who travel outside the region are more likely to find news from foreign outlets beneficial (61%, vs. 40% of those who do not travel outside of the region).

This survey asked respondents whether they agreed with the statement that "people benefit from consuming news from foreign news organization." In the 2014 study Entertainment *Media Use in the Middle East*, respondents were asked a similar question: whether they agreed with the statement that "people benefit from consuming entertainment content from different parts of the world." By comparison, it appears that significantly more people in the region embrace foreign entertainment than foreign news.

Most UAE nationals prefer state-owned news organizations; Lebanese prefer privately owned

Percent who say their favorite news organization is owned by...

State/Government
Private/Corporate

	UAE	Qatar	Tunisia	KSA	Lebanon
State/Government	71%	49%	45%	32%	7%
Private/Corporate	20%	33%	34%	54%	90%

Base: Nationals only
*Not asked in Egypt

Seven in ten say their favorite news organization is based in their own country. Nationals in Saudi Arabia, however, are an exception; about half say their favorite news organization is based in an Arab country other than Saudi Arabia (51%). Many nationals prefer government-owned news outlets to private news organizations, particularly in the UAE. Lebanese and Saudis prefer privately-owned news outlets.

DISCUSSION:
Credibility of News Media

More people say national news in their country are credible than did in 2013. At the same time, fewer people said the quality of news reporting in the Arab world had improved. Some may argue we are seeing evidence of an orientation away from pan-Arab content and toward a more insular nationalism, others that national news organizations are finally starting to match the quality and sophistication of pan-Arab channels such as Al Jazeera and Al Arabiya.

Prosperity and stability may be linked to perceptions of national news credibility. Egyptians, who have experienced years of political turmoil including infamous crackdowns on journalistic organizations, are less confident than others that the news media in their country are credible. In contrast, those in stable and prosperous UAE hold extremely positive views of their news media and also feel they receive favorable coverage in the international press.

After years of turmoil, crackdowns, and tough coverage, Egyptians hold negative views of many news media. It is not just their own media that Egyptians hold in low esteem, they are also the least likely to believe that people benefit from consuming news produced by foreign organizations. The long and politicized ordeal of Al Jazeera's coverage of the Egyptian revolution and counter-revolution must be considered.

Perceptions of national media credibility and independence have declined in Saudi Arabia. Coincidentally or not, Saudis are more likely to prefer news organizations from outside the country.
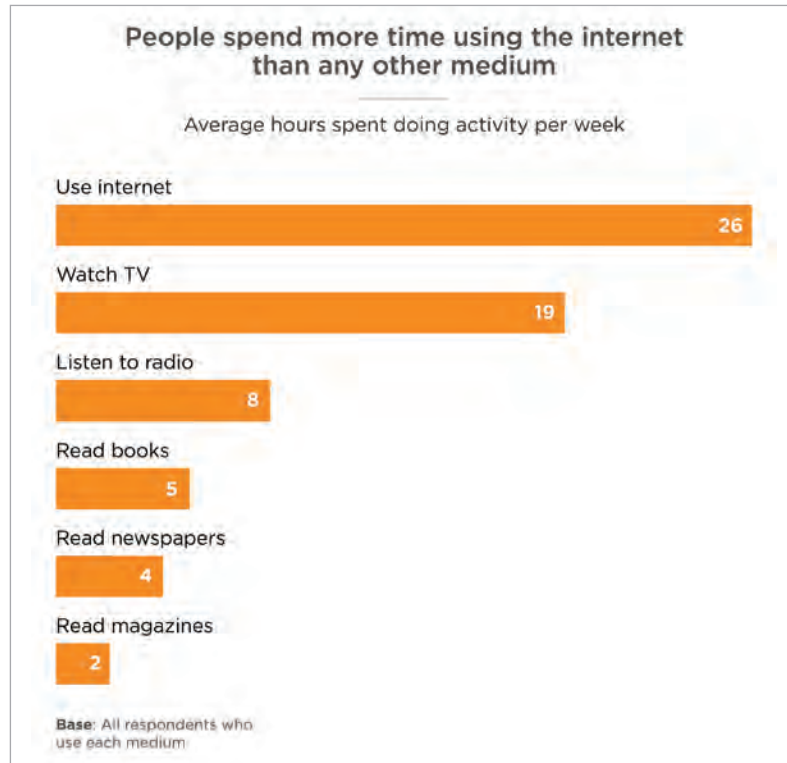
KEY INDICATORS OF MEDIA USE

TV most important source of news, passed by internet in some demographics

In this chapter

- Television remains ubiquitous, but internet users are watching less of it

- The news Arabs follow: national and international, cultural and political

- Respondents more willing to pay for online and television news content than other formats

- More nationals access Arabic internet content; reliance on English falls

- Arab world closing the digital divide; internet penetration up in most countries

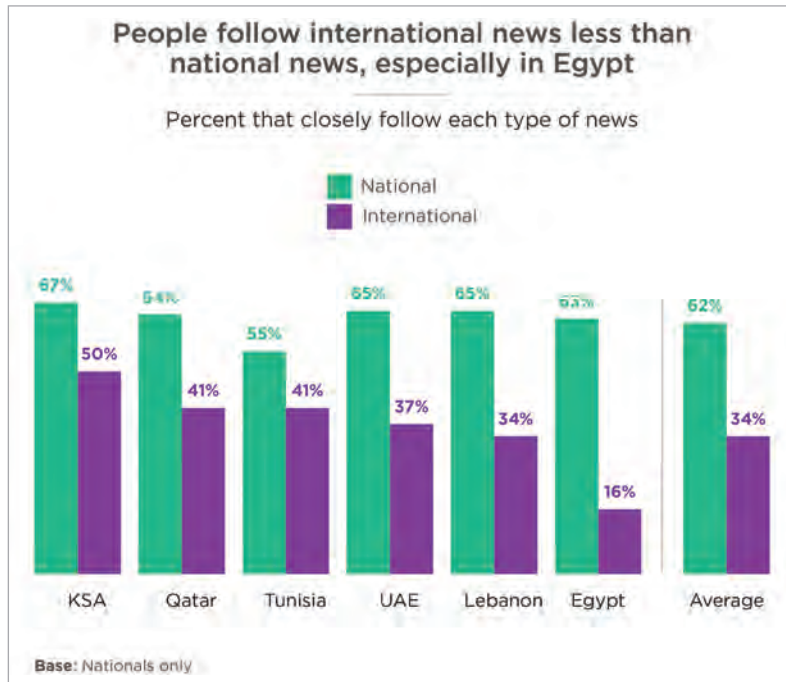- News, comedy, and religious programming top TV and online video genres

—

Television remains ubiquitous, but internet users are watching less of it

People spend more time using the internet than any other medium

Average hours spent doing activity per week

Activity	Hours
Use internet	26
Watch TV	19
Listen to radio	8
Read books	5
Read newspapers	4
Read magazines	2

Base: All respondents who use each medium

People in the region use a variety of media. Nearly everyone in the region watches TV (97%) and two in three listen to the radio (65%). Fewer read newspapers, books, or magazines (49%, 43%, and 38%, respectively). However, respondents spend the greatest portion of their time with media online. Presumably because they are spending more of their time online, internet users spend less time watching TV (18 hours vs. 24 hours) and listening to radio (7 hours vs. 13 hours) compared to those who are not online.

There is a clear distinction between younger and older nationals in how they choose to spend media time: younger adults spend more time online than watching TV, while the opposite is true of older cohorts. Each week, younger adults (18-24 year olds) are online for an average of 31 hours and spend 19 hours watching TV. In contrast, those who are 45 and older watch an average of 23 hours of television per week and are online for 19 hours.

The news Arabs follow: national and international, cultural and political

People follow international news less than national news, especially in Egypt

Percent that closely follow each type of news

National
International

	KSA	Qatar	Tunisia	UAE	Lebanon	Egypt	Average
National	67%	54%	55%	65%	65%	63%	62%
International	50%	41%	41%	37%	34%	16%	34%

Base: Nationals only

People say their favorite news organization is based in their own country, except in Saudi Arabia

Percent who say their favorite news organization is based in...

Their own country
Another country in the Arab world

	Lebanon	Qatar	UAE	Tunisia	KSA
Their own country	94%	91%	69%	60%	39%
Another country in the Arab world	5%	3%	23%	25%	51%

Base: Nationals only
*Not asked in Egypt

In all countries surveyed, nationals are active news consumers; sizeable majorities say they follow national news closely. While respondents are most interested in their national news, many also follow international news. Saudis are most likely to follow international news, while Egyptians are least interested in news outside their borders.

Nationals who follow news closely are inclined to share it online. They are inclined to follow national news (62% vs. 54% follow closely), regional news (45% vs. 37%), and international news (37% vs. 30%).
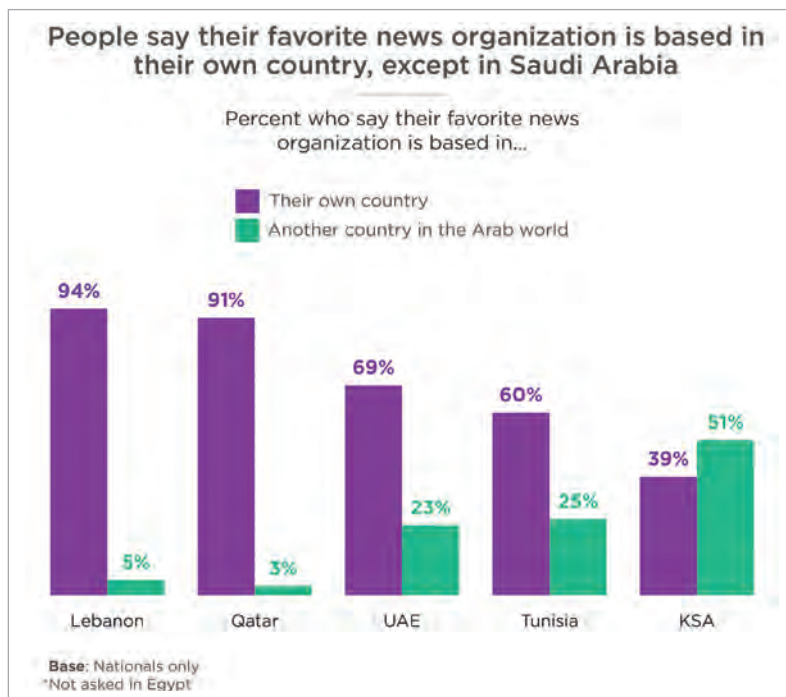
Nationals with greater international exposure tend to have a larger appetite for global news. Those who traveled outside the Middle East in the past three years are more likely to closely follow international news than those who did not (50% vs. 31%).

Majorities in all countries except Saudi Arabia say their favorite news organization is based in their own country, suggesting a strong interest in national news. Women and older nationals are more likely than their respective counterparts to favor news organizations in their country.
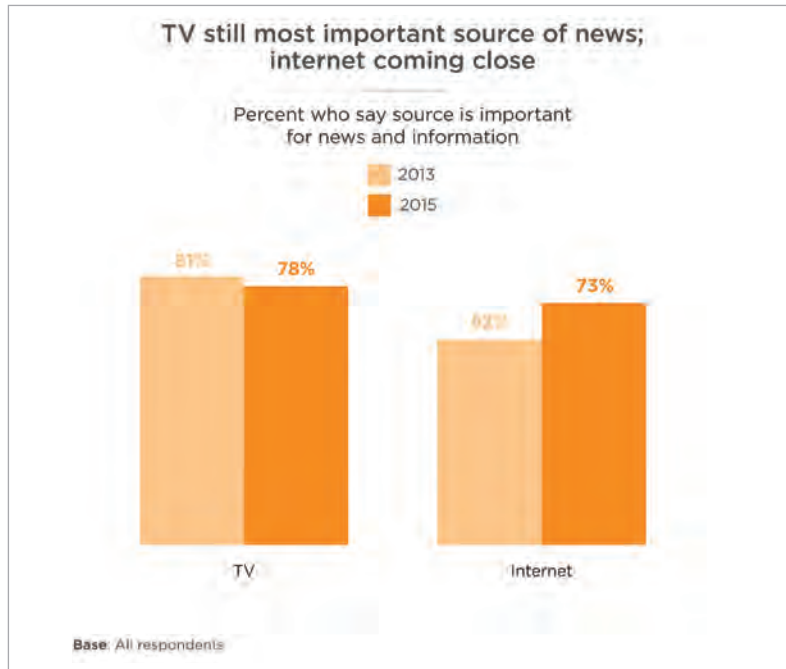
As avid consumers of news overall, nationals are interested in a variety of news genres.

Seven in ten report interest in public affairs news. Respondents also express interest in news about entertainment/culture, comedy/satire, and religious/spiritual content (65%, 61%, and 57%, respectively). Fewer are interested in sports or business/economy (45% and 35%).

Qataris and Egyptians express less interest in news of public affairs (59% Qatar, 62% Egypt), entertainment and culture (60% and 45%), and comedy and satire (52% each) than do other nationals. Qataris and Emiratis express the most interest in religious and spiritual news (77% and 70%). Gulf states also show more interest than others in sports news, as do men (68%, vs. 22% of women) and younger adults (54% 18-24 vs. 37% 45+).
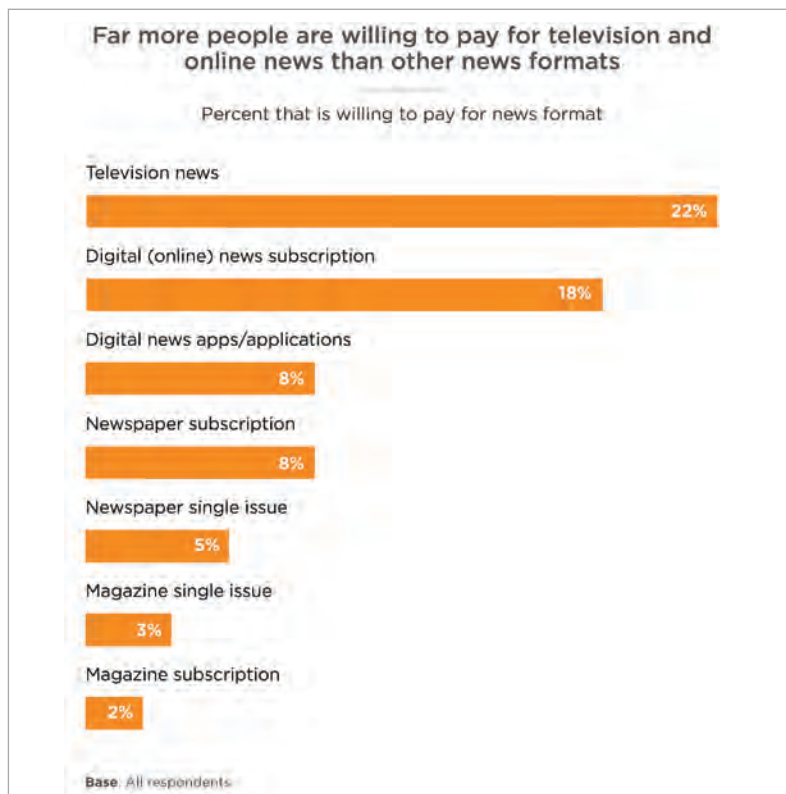
Respondents more willing to pay for online and television news content than other formats
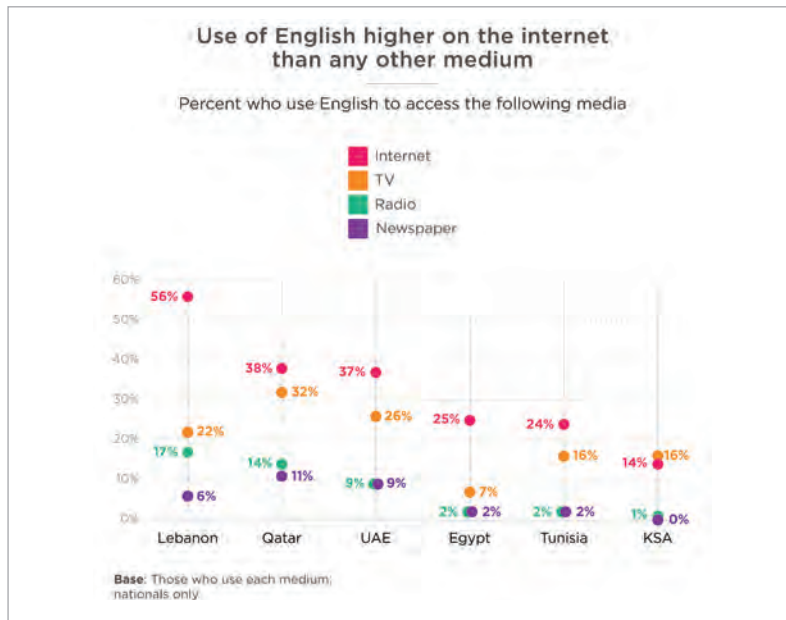
TV still most important source of news; internet coming close

Percent who say source is important for news and information

2013
2015

81% | 78% | 62% | 73%

TV | Internet

Base: All respondents

Far more people are willing to pay for television and online news than other news formats

Percent that is willing to pay for news format

Television news	22%
Digital (online) news subscription	18%
Digital news apps/applications	8%
Newspaper subscription	8%
Newspaper single issue	5%
Magazine single issue	3%
Magazine subscription	2%

Base: All respondents

People in the region look to a variety of sources for news. Three in four say TV, interpersonal sources and the internet are important for news and information, and six in ten cite social media. Those who find the internet an important news source grew from 62% in 2013 to 73% in 2015. More than half of internet users (55%) look for news online on a daily basis, compared with 48% in 2013.

Despite evident desire for news from multiple sources, nationals are largely unwilling to pay for it. About one in five respondents is willing to pay for television news (22%) and digital content subscriptions (18%), but these numbers fall for other news formats. Tunisians are less likely than those in other countries to be willing to pay for any news content (25%), while people in Qatar and UAE are more likely to pay for any news source (62% each).

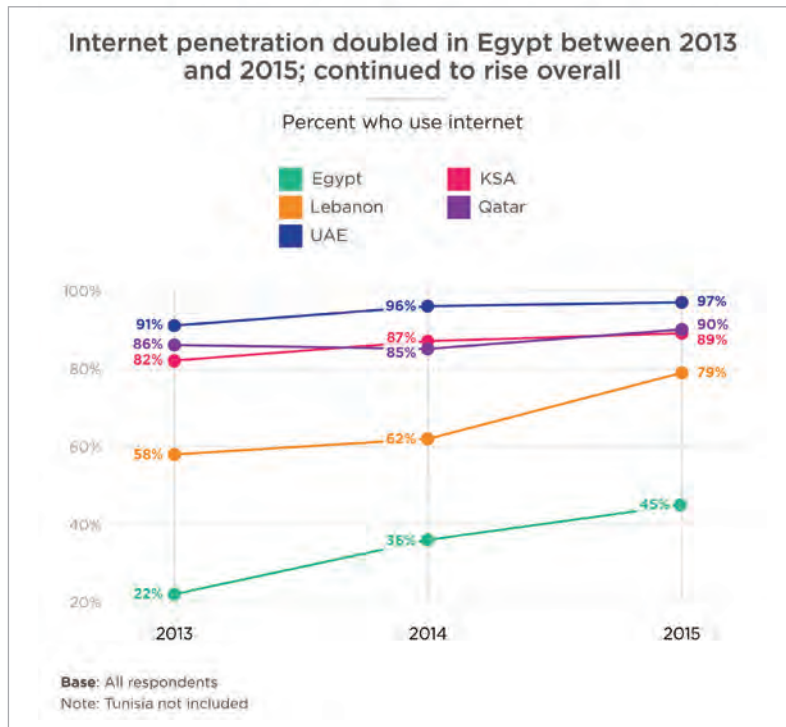# More nationals access Arabic internet content; reliance on English falls

Use of English higher on the internet than any other medium

Percent who use English to access the following media

Legend: Internet, TV, Radio, Newspaper

	Lebanon	Qatar	UAE	Egypt	Tunisia	KSA
Internet	56%	38%	37%	25%	24%	14%
TV	22%	32%	26%	7%	16%	16%
Radio	17%	14%	9%	2%	2%	1%
Newspaper	6%	11%	9%	2%	2%	0%

Base: Those who use each medium; nationals only

Aside from Arabic, English most used in Lebanon; French most used in Tunisia

Percent who use language to access the following media

Legend: French, English

Lebanon

	French	English
Internet	11%	56%
TV	6%	22%
Radio	10%	17%
Newspaper	5%	6%

Tunisia

	French	English
Internet	71%	24%
TV	32%	16%
Radio	15%	2%
Newspaper	17%	2%

Base: Those who use each medium; nationals only

Nationals access media primarily in Arabic, with more than nine in ten following all media in Arabic. English is a distant second, used more frequently for internet and television than radio or newspapers. Notably, compared with two years ago, nationals are more likely to access Arabic content on the internet (89% in 2013 vs. 93% in 2015) and less likely to access English content (41% in 2013 vs. 33% in 2015), perhaps due to greater availability of Arabic content online.

Few nationals access media in languages other than Arabic and English, with the exception of French in Lebanon and Tunisia. Tunisia is the clearest exception; most access the internet in French.

Those who say it is OK for people to express their ideas online, even if they are unpopular, are more likely than those who don't to use the internet in English (36% vs. 26%). Younger nationals are more likely to use English on the internet (38% 18-24 year olds vs. 28% 45 or older) and to watch television in English (24% vs. 8%).
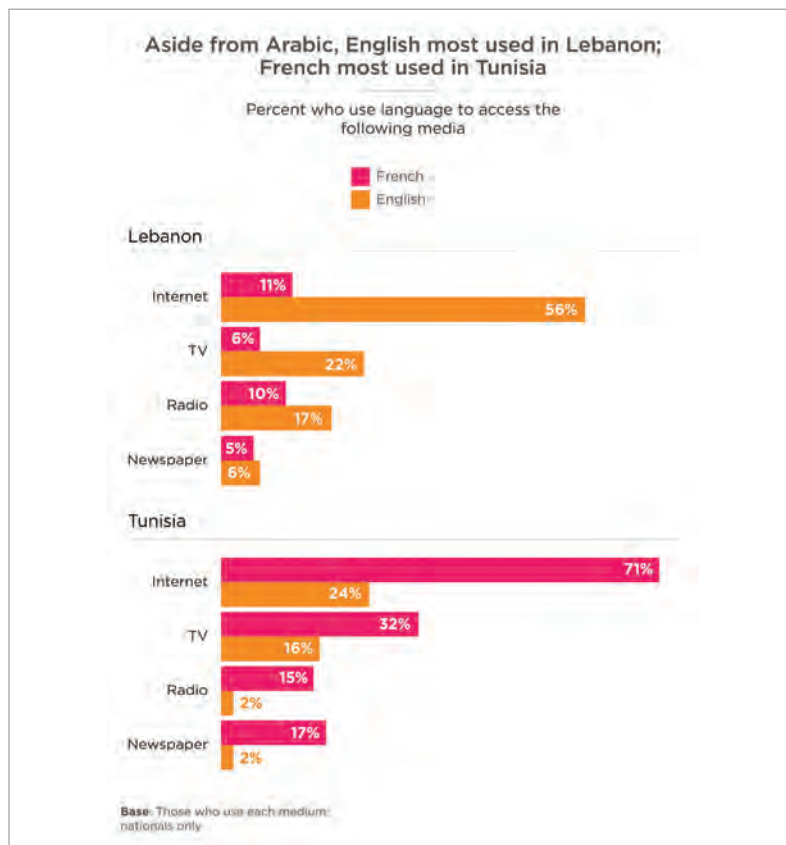
Arab world closing the digital divide; internet penetration up in most countries, doubled in Egypt since 2013
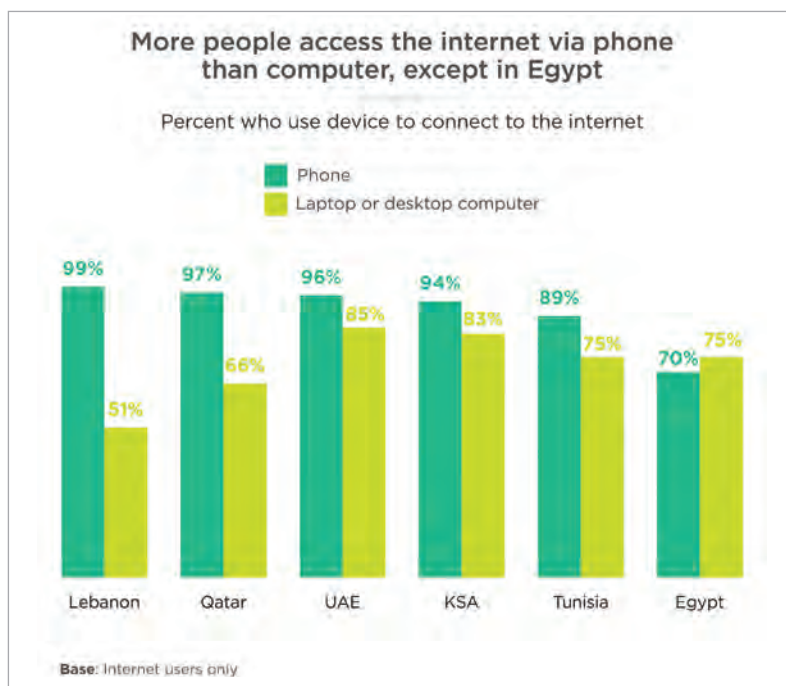

Internet penetration doubled in Egypt between 2013 and 2015; continued to rise overall

Percent who use internet

Egypt
Lebanon
UAE
KSA
Qatar

UAE: 91%, 96%, 97%
Qatar: 86%, 87%/85%, 90%
KSA: 82%, 87%/85%, 89%
Lebanon: 58%, 62%, 79%
Egypt: 22%, 36%, 45%

2013   2014   2015

Base: All respondents
Note: Tunisia not included

In internet penetration, the gap among countries is narrowing, although there remains variation across the region. Most notably, use of the internet has more than doubled in Egypt in the past two years.

Internet use is strongly correlated to education. Ninety-four percent of those who attended university use the internet compared with nineteen percent with a primary school education.

A sizeable difference is seen in all countries, but the gap is not as wide in Qatar and Saudi Arabia. Men continue to be more likely to be online than women, but that distinction is closing. In 2013 there was a 10 percentage point difference between genders in internet usage (71% vs. 61%), as compared to a six percentage point gap (77% vs. 71%) in 2015.

People in the region utilize their phones for internet more often than a computer, except in Egypt. Tablets are moderately popular in the region (31% use tablets), especially in the Gulf (41%, 40%, and 36%, respectively in UAE, Saudi Arabia, and Qatar).

More people access the internet via phone than computer, except in Egypt

Percent who use device to connect to the internet

Phone
Laptop or desktop computer

Lebanon: 99%, 51%
Qatar: 97%, 66%
UAE: 96%, 85%
KSA: 94%, 83%
Tunisia: 89%, 75%
Egypt: 70%, 75%

Base: Internet users only

News, comedy, and religious programming top TV and online video genres

Women are more interested than men in religious content

■ Men
■ Women

Watch religious/spiritual video content on TV
46%
60%

Watch religious/spiritual video content on online
25%
34%

Interested in religious/spiritual news
52%
62%

Base: Nationals only (use media)

Comedy and news/documentary are the most common types of video content watched both online and on TV.

Women are more likely than men to watch comedy (79% vs. 72%) and social satire (53% vs. 45%) on TV. Across the region, women express more interest in religious or spiritual content than men.

Younger internet users (18-24 year olds) are more likely than those 45 and older to use the internet to watch comedy (62% vs. 45%) and social satire (49% vs. 40%). The younger group is just as likely to watch news and documentaries online as TV, reflecting their acclimatization to the internet as a news source. Those 45 and older watch more news/documentaries on TV than younger people (78% vs. 61%).

DISCUSSION:
Key Indicators of Media Use

The internet may be starting to chip away at the dominance of TV. While TV is still cited as an important source of news more often than the internet, the margin is shrinking. In Qatar and Saudi Arabia, two of the three most wired countries, "only" 90% and 93% (respectively) of 18-24 year-olds say they watch TV at all, compared to nearly 100% in other countries.

Comedy is the most popular TV genre in all countries except Qatar and Tunisia, where news is more commonly watched. Notably, when asked about online video, more Tunisians and Saudis say they watch social satire than news, or even comedy itself.

The internet is mobile in the Middle East, too. As in many parts of the world, more people access the internet on a phone than on a computer in all nations except Egypt, which has the lowest internet penetration of all countries surveyed.

Book reading is on the rise. 36% of nationals said they read books, a considerable increase from 25% in 2013. Coupled with a decline in the use of English on the internet that was especially pronounced among those without a university diploma, one might consider whether these are results of improved national education systems, Arabic literacy programs, or a growing embrace of national or Arabic culture.
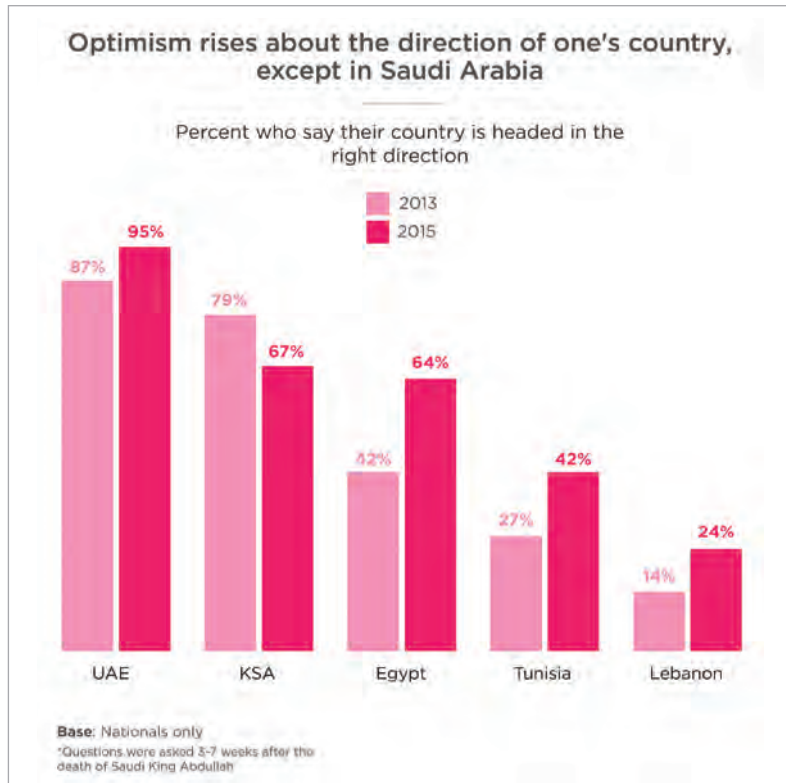
PROFILES OF MEDIA USERS

Media users by national optimism, perceived bias, age, and education


🔖 **In this chapter**

- Optimism rises about the direction of one's country

- Most see bias in international news coverage of their country; bias often seen as favorable

- Age groups and media use: differences in principle and practice

- Education level and media use: differences in principle and practice
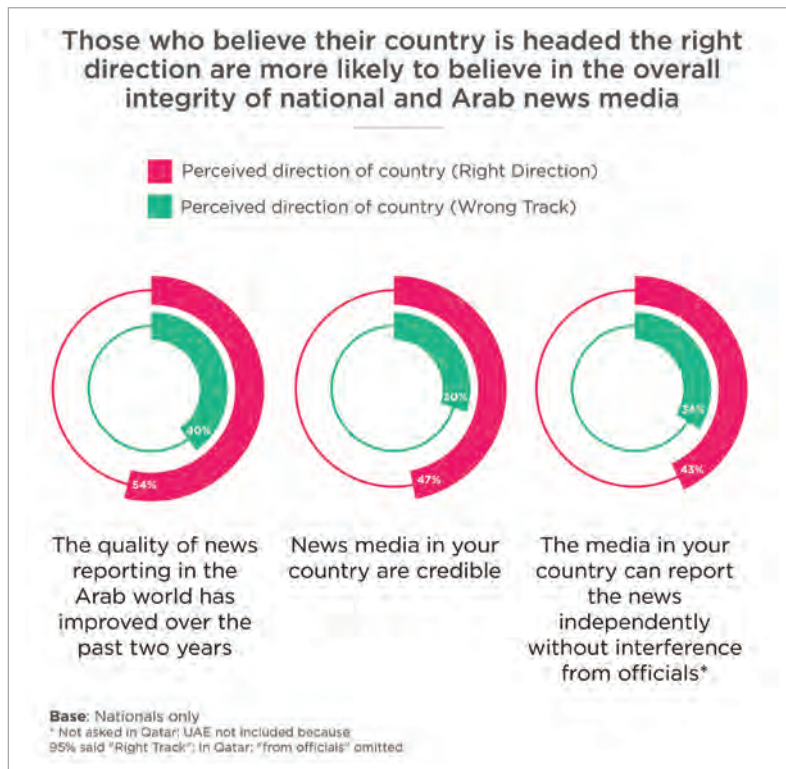
Optimism rises about the direction of one's country

Optimism rises about the direction of one's country, except in Saudi Arabia

Percent who say their country is headed in the right direction

■ 2013
■ 2015

Country	2013	2015
UAE	87%	95%
KSA	79%	67%
Egypt	42%	64%
Tunisia	27%	42%
Lebanon	14%	24%

Base: Nationals only
*Questions were asked 3-7 weeks after the death of Saudi King Abdullah

Conservatives far more likely to believe their country is headed in the right direction; progressives more likely to say things are on the wrong track

■ Culturally conservative
■ Culturally progressive

Percent who believe their country is...

Headed in the right direction
- Culturally conservative: 57%
- Culturally progressive: 35%

Off on the wrong track
- Culturally conservative: 33%
- Culturally progressive: 54%

Base: Nationals only
* Not asked in Qatar

Across the region, nationals express more optimism about their country's trajectory than two years ago. Saudia Arabia, where the king had died only weeks before fieldwork began, was the only exception. When asked, "Overall, do you think things in your country are generally headed in the right direction, or do you think things are off on the wrong track?" Egyptians and Tunisians, who are experiencing relative political stability compared to 2013, report the largest increases in national optimism. Nearly two in three Egyptian nationals (64%) feel their country is headed in the right direction compared with 42% in 2013. Forty-two percent of Tunisians feel their country is on the right path compared with 27% in 2013. Despite the decline in optimism in Saudi Arabia, two-thirds still feel the country is headed in the right direction. Officials in Qatar did not approve this question for fieldwork.

Taken as a whole, 56% of all nationals said their country is headed the right direction (a rise from 47% in 2013), and 32% said their country was on the wrong track (a decline from 40% in 2013). Progressives are far more likely to say their country is on the wrong track, while conservatives say their country is headed the right direction. Accordingly, those who say their country is headed in right direction are far more likely to be conservative, and those who say their country is on the wrong track are more likely to be progressive.
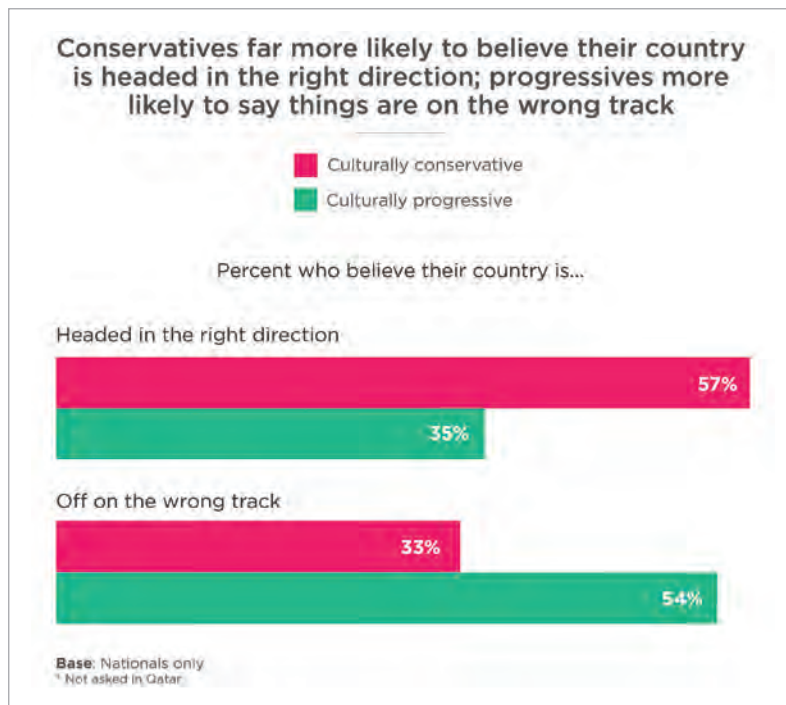
Optimism appears related to general news consumption, particularly consumption of national news. Those who believe in their country's progress are considerably more likely to trust mass media to report the news fully, fairly, and accurately than those who don't (79% vs. 49%). They are also more likely to feel the quality of news reporting in the Arab world has improved over the past two years (57% vs. 40%), describe their own nation's news as credible (51% vs. 30%), and believe their nation's media report independently of official interference (56% vs. 34%).

Optimists are almost twice as likely to say their favorite news organization is run by their government (41%, vs. 21% of those who say wrong track), while those who feel the country is on the wrong track.
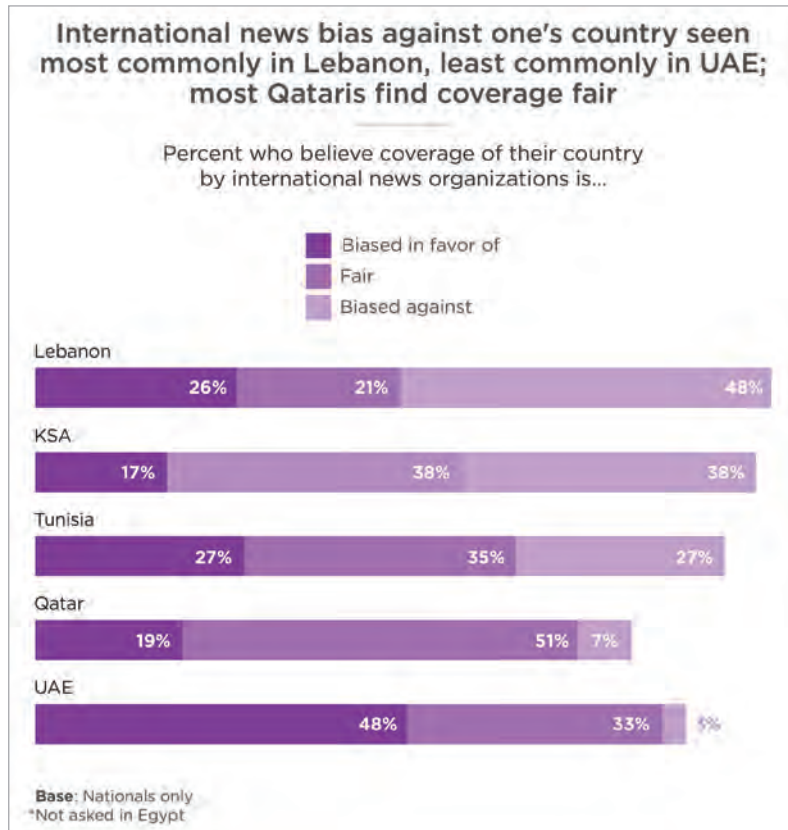
Those who believe their country is headed the right direction are more likely to believe in the overall integrity of national and Arab news media

Perceived direction of country (Right Direction)

Perceived direction of country (Wrong Track)

The quality of news reporting in the Arab world has improved over the past two years — 54% / 40%

News media in your country are credible — 47% / 40%

The media in your country can report the news independently without interference from officials* — 43% / 34%

Base: Nationals only
* Not asked in Qatar; UAE not included because 95% said "Right Track"; in Qatar; "from officials" omitted

Nationals optimistic about their country tend to follow national news more closely than those less optimistic (66% vs. 59%). Additionally, they are more likely to read online news daily (62% vs. 45%). Perhaps consequently, optimists are more likely to share news online with others (67% vs. 56%). They are more inclined to share news via social media (58%) and direct message (30%) than email (11%). Optimists also use Twitter twice as often as those who feel their country is on the wrong path (47% vs. 25%).

Those optimistic about their country demonstrate greater interest in religious news (62%, vs. 49% wrong track), while less optimistic nationals are inclined to comedy/social satire (67%, vs. 58% right direction), and watch more social satire on TV (56%, vs. 45% right direction).

Nationals less optimistic about their country's direction tend to believe in the freedom to criticize governments online (46%) compared to 38% of those more optimistic. However, they are less convinced public officials will listen to what they have to say online (26%, vs. 36% of those who are optimistic).
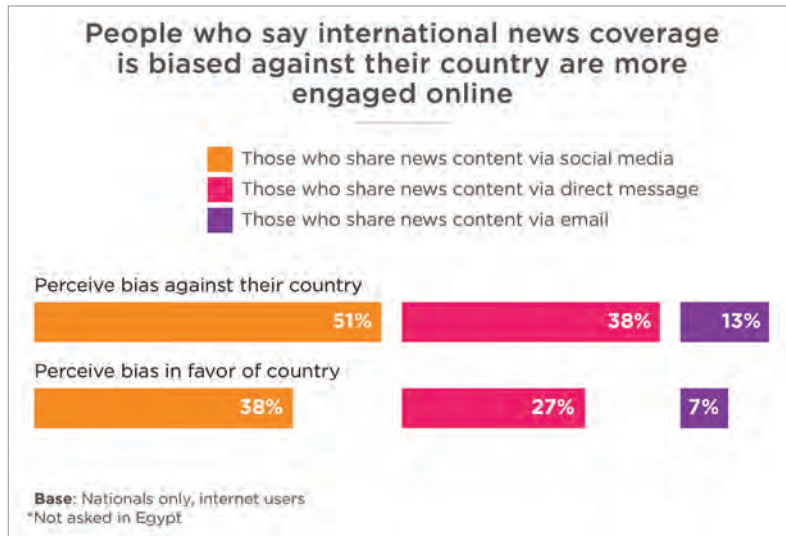
Most see bias in international news coverage of their country; bias often seen as favorable

International news bias against one's country seen most commonly in Lebanon, least commonly in UAE; most Qataris find coverage fair

Percent who believe coverage of their country by international news organizations is...

- Biased in favor of
- Fair
- Biased against

Lebanon
26% | 21% | 48%

KSA
17% | 38% | 38%

Tunisia
27% | 35% | 27%

Qatar
19% | 51% | 7%

UAE
48% | 33% | 5%

Base: Nationals only
*Not asked in Egypt

Overall, one third of nationals surveyed believe international news reporting is biased against their country, and one in four say international news organizations are biased in favor of their country (a third say coverage is fair). Perceptions of bias vary considerably by country: pluralities of Lebanese (48%) and Saudis (38%) feel international coverage of their country reveals negative bias, while nearly half of Emiratis (48%) feel international coverage favors the UAE. Most Qataris (51%) feel coverage of their country is fair. The question was not asked of Egyptians.

Those who cite media bias against their country are more likely to be culturally progressive than those who see favorable coverage (26% vs. 18%). Arab perceptions of international media bias relate to media use: those who believe there is a negative bias have greater consumption of national news compared to nationals who believe media have less bias against their country.
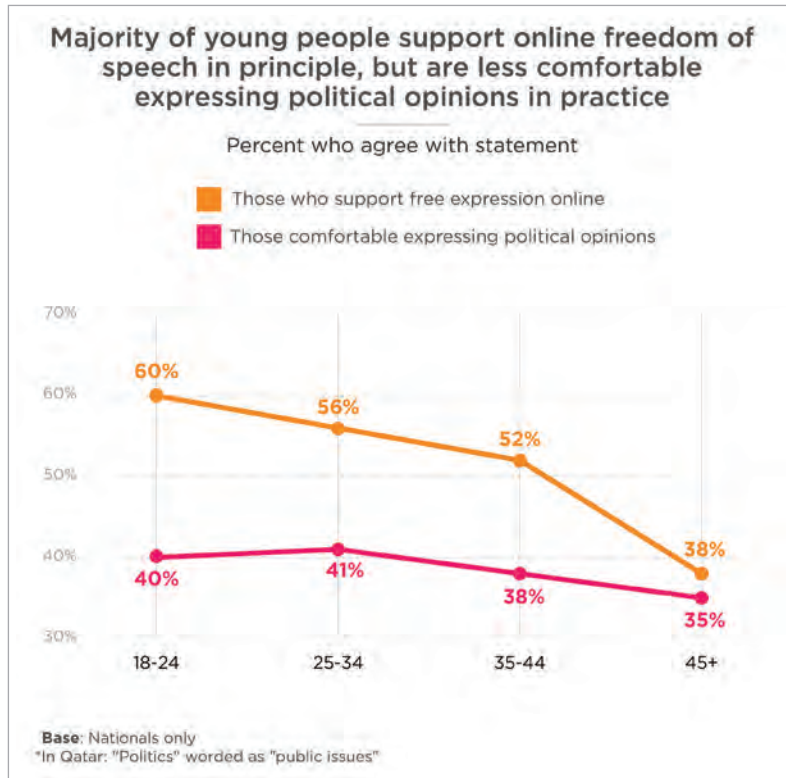

People who say international news coverage is biased against their country are more likely to follow national and international news

- Follow national news closely
- Follow news about the Middle East closely
- Follow international news closely

Biased against country
71% | 57% | 47%

Biased in favor of country
57% | 42% | 35%

Base: Nationals only
*Not asked in Egypt

People who say international news coverage is biased against their country are more engaged online

■ Those who share news content via social media
■ Those who share news content via direct message
■ Those who share news content via email

Perceive bias against their country

| 51% | 38% | 13% |

Perceive bias in favor of country

| 38% | 27% | 7% |

Base: Nationals only, internet users
*Not asked in Egypt

Nationals are more willing to pay for news content if they believe global news outlets are negatively biased toward their country (51%) compared with those who cite positive bias (42%). Additionally, belief in media bias leads to favoring privately owned news organizations (71%) over state run (18%).

Those who see international news bias against their country say people benefit from consuming foreign news more than those who find coverage favorable (54% vs. 49%). Despite little difference in social media use among the groups, skeptics of the impartiality of foreign media coverage are more likely to share news content via social media channels.

Those who see positive bias in international coverage of their country are more likely to watch online news than their more negative compatriots (49% vs. 38%). They also watch social satire (50% vs. 37%) and religious video content (28% vs. 19%) more often.

Belief in positive international news bias creates a halo effect: these nationals see media in their own country as credible (53%) and independent of government interference (54%) more than those who see negative media bias (37% and 42%, respectively).

Age groups and media use: differences in principle and practice

Majority of young people support online freedom of speech in principle, but are less comfortable expressing political opinions in practice

Percent who agree with statement

- Those who support free expression online
- Those comfortable expressing political opinions

Base: Nationals only
"In Qatar: "Politics" worded as "public issues"

Older internet users are as likely as younger users to say being online can increase political influence

Percent who agree that they can have more political influence by using the internet

Base: Nationals only, internet users
"In Qatar: "Political influence" worded as "influence on society"

Nearly all Arab 18-24 year-olds are online, compared with just one in three of those 45 and older (90% vs. 31%). Six in ten 35-44 year-olds use the internet, increasing to eight in ten of 25-34 year olds.

Perhaps due to their significant online presence, younger nationals are more supportive of freedom of expression on the internet than older respondents. Younger nationals are likely to feel it is safe to express one's political views online and believe in freedom to criticize governments on the internet. In practice, though, younger nationals are less likely to feel comfortable expressing their own political opinions than they are to support the right to express political views.

Nonetheless, perceptions of political empowerment online do not differ by age; four in ten of all nationals believe the internet strengthens political influence, and about one-third feel the internet will cause public officials to pay more attention to their beliefs.

The youngest nationals (18-24) are less interested in news than older citizens. Nevertheless, a majority of the youngest group follows national news closely (52%, 18-24 vs. 62%, 25-34 and 66%, 35-44 and 70%, 45+). There is a clear distinction between those under and over 25 with regard to attention to international news; 33% vs. 47% of those 25 and older follow regional news closely and 27% vs. 37% follow international news closely.

Preferences for news genre also vary by age; younger adults express the most interest in entertainment-based news. The younger generations show more interest in entertainment/ culture (73% 18-24 vs. 59% 45 and older), comedy/ social satire (68% vs. 55%), and sports (54% vs. 37%). The oldest adults, on the other hand, are more interested than those younger in news related to public affairs (64% 18-24 vs. 79% 45 and older) and religion (48% 18-24 vs. 69% 45 and older).

While older nationals tend to consume more news in general, they are less likely than younger respondents to express a willingness to pay for news content (47% 18-24 vs. 37% 45+).
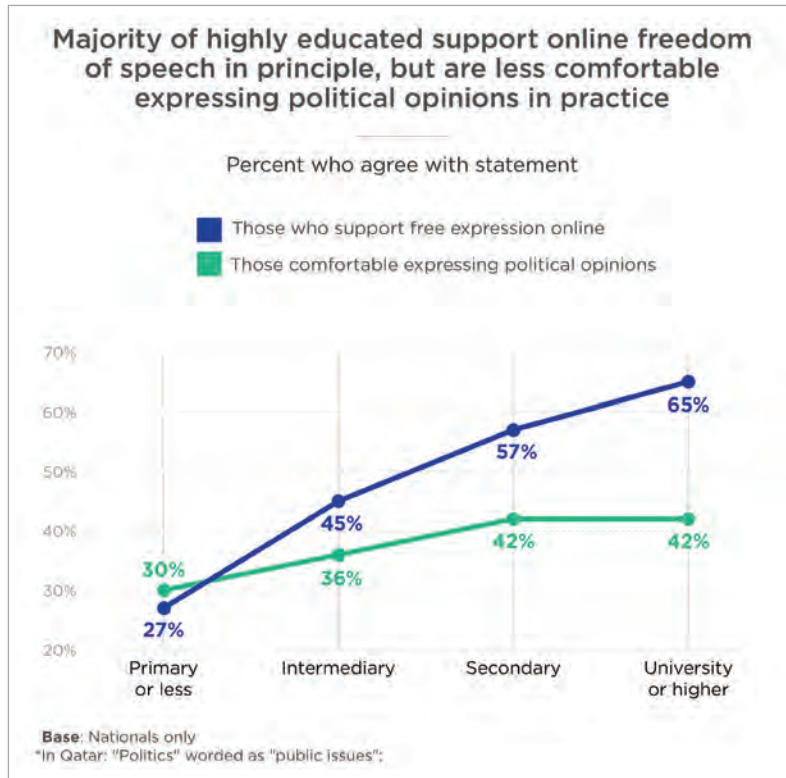
Young people are more willing to pay for news content overall, not just digital

Percent who are willing to pay for type of news content

- Any news content
- Digital news subscription

	18-24	25-34	35-44	45+
Any news content	47%	47%	45%	37%
Digital news subscription	22%	20%	16%	8%

Base: Nationals only
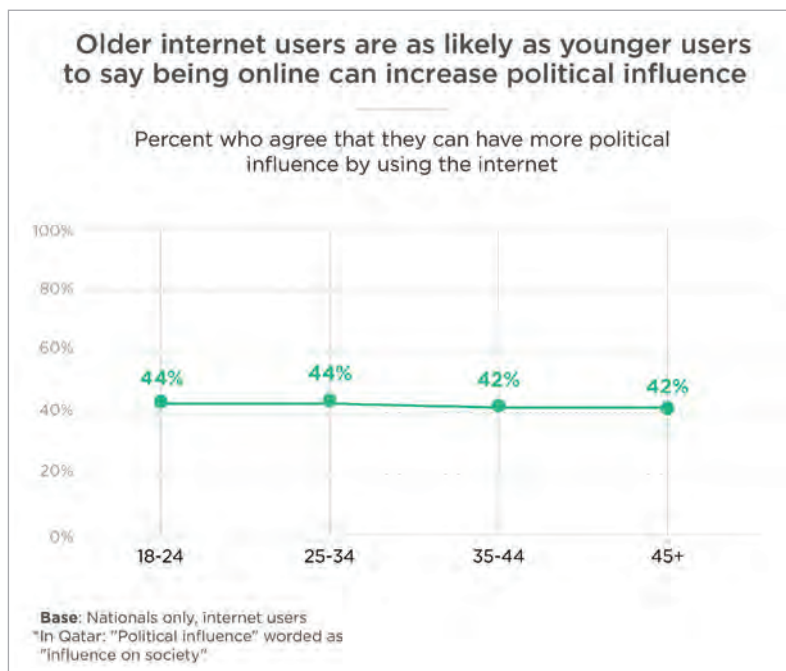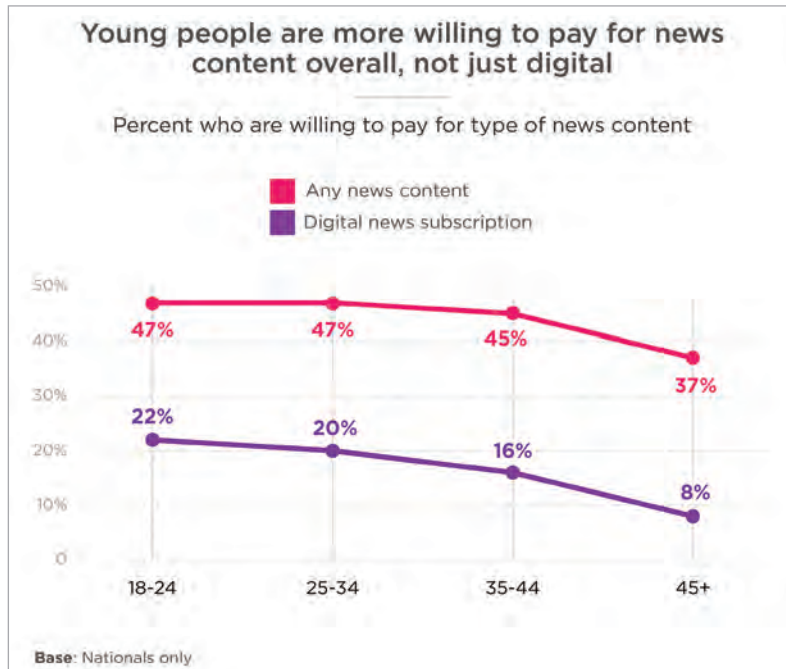
Young respondents (18-24) spend about 30 hours online per week, compared with 18 hours for those 45 and up. The younger group also spends twice as much time socializing with friends online (15 hours vs. 7 hours). Nearly all social media use trends younger, with higher use of Facebook, YouTube, Twitter, and Instagram among younger nationals, while WhatsApp is popular among all age groups. Young respondents post messages and other content far more often than their older contemporaries.

Younger nationals use the internet for entertainment, including for watching videos, listening to music, and playing games. Older Arabs, on the other hand, are more apt than those younger to look for news and information online. Comedy, social satire, and sports are accessed online by younger respondents more often than older adults, but there is little variance by age in online viewership of news and religious video content.

Education level and media use: differences in principle and practice

Majority of highly educated support online freedom of speech in principle, but are less comfortable expressing political opinions in practice

Percent who agree with statement

■ Those who support free expression online
■ Those comfortable expressing political opinions

	Primary or less	Intermediary	Secondary	University or higher
Support free expression online	27%	45%	57%	65%
Comfortable expressing political opinions	30%	36%	42%	42%

Base: Nationals only
"In Qatar: "Politics" worded as "public issues".

Importance of internet as a news source rises sharply with education

Percent who say each medium is an important news source

■ Television
■ The Internet

	Primary or less	Intermediary	Secondary	University or higher
Television	82%	80%	82%	79%
The Internet	30%	61%	77%	86%

Base: Nationals only

While highly educated individuals tend to support freedom of speech online in general, and are more likely to believe using the internet can enhance one's political influence, they report less comfort expressing their own political opinions. Those with less formal education generally show less support for freedom of expression as well as greater comfort expressing political opinions.

Nationals throughout the region, regardless of education level, are staunch consumers of news. Overall, six in ten nationals follow national news closely (58% primary school education, 64% intermediary, 63% secondary, 64% university or higher) and one in three follow international news closely (31% primary, 28% intermediary, 39% secondary, and 35% university or higher). Additionally, majorities at all education levels are interested in news about public affairs (66% primary, 70% intermediary, 74% secondary, and 73% university or higher).

How people consume news, though, does differ by education. Those with more education are much more likely to turn to the internet as an important source for news.
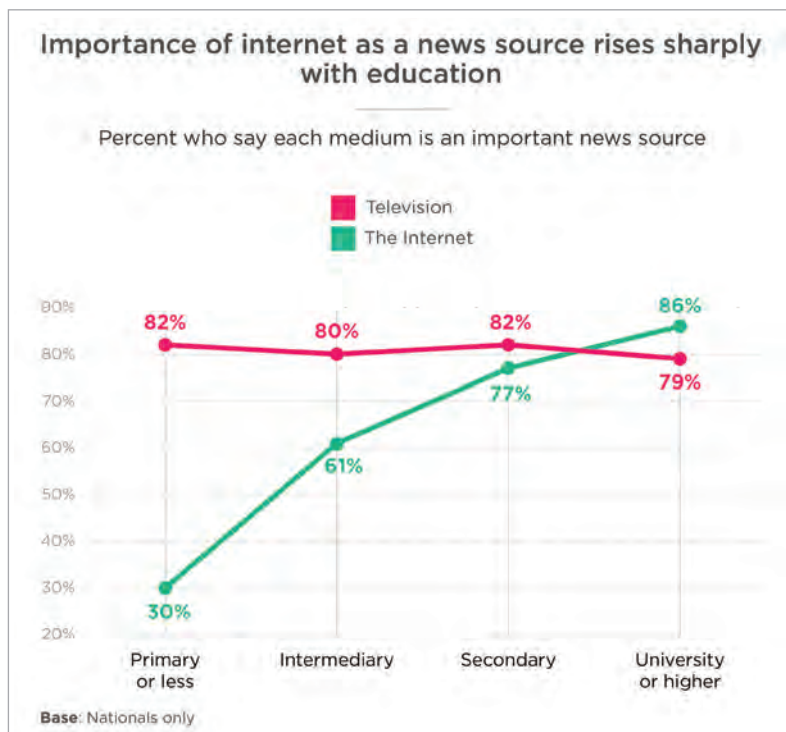
Nationals of all education levels express high levels of trust in mass media. Two in three nationals (65%) say they trust mass media to report the news fully, fairly and accurately.

University-educated nationals are far more likely than those with less education to access the internet, TV and, to some extent, radio in English. Particularly, those with a university education are twice as likely as those with an intermediary or secondary school education, and four times more likely than those with a primary school education, to use the internet in English (10% primary, 24% intermediary, 21% secondary, 47% university or higher). Few nationals, regardless of education, read English-language newspapers.

Interest in sports is lower among the less educated

■ Percent who watch sports on TV
■ Percent who watch sports on online
■ Interested in sports news

60%

52%   51%

50%

49%   49%

40%   37%

34%   36%

30%   32%   33%   31%

22%

20%   17%

10%

Primary   Intermediary   Secondary   University
or less   or higher

Base: Nationals only; TV, online
- users of medium only
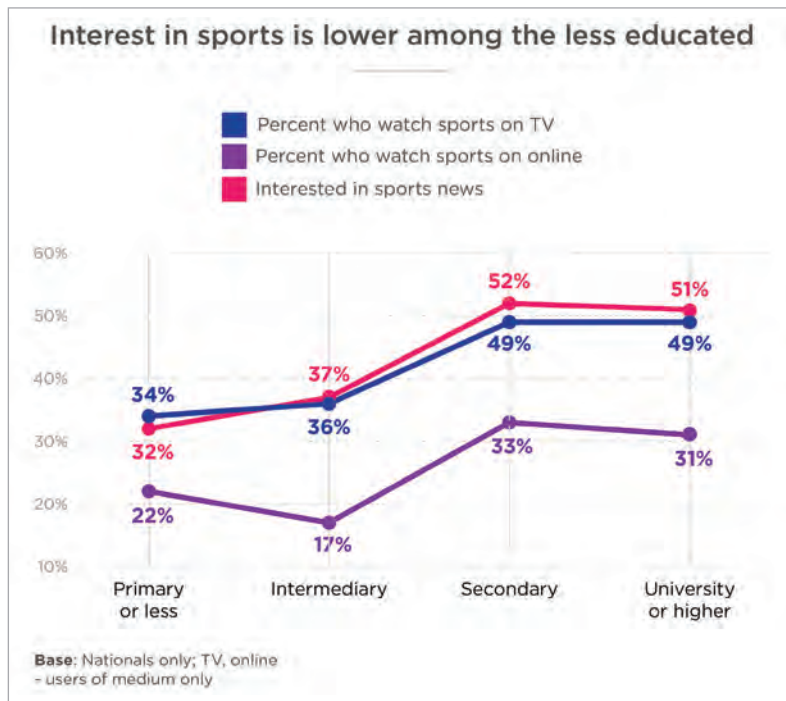
People of all education levels demonstrate a strong preference for comedy and news genres on TV. Those with the lowest education levels watch more religious content on TV (59% primary vs. 50% university or higher), while those with more education watch more sports.

Internet use differs highly according to education. More than nine in ten (91%) nationals with a university education are online, compared with 16% of those with only a primary level education. A slight majority of those with an intermediary education are online (55%) and three in four (76%) of those with a secondary school education. Those with a secondary school or university education tend to be more active on social media than those with less education. Those with a university education are also more likely to share news content (48% primary, 56% intermediary, 58% secondary, 64% university or higher).

DISCUSSION:
Profiles of Media Users

Nationals are nearly as likely to see international news bias as being tilted in favor of their country as against it. Lebanese are most likely to see bias against their country. It is possible that Lebanese feel the country's unstable political environment obscures the many desirable aspects of Lebanon which, for example, make Beirut one of the most vibrant capitals in the region. In the small, stable, predominantly wealthy Gulf countries of Qatar and UAE, nationals are more likely to think international news bias works in favor of their countries than against it.

The greatest increase in national optimism occurred in countries most affected by the "Arab Spring." Egyptians and Tunisians recorded the largest increase in belief that their country is headed in the right direction. Greater pessimism existed in Egypt in 2013, it appears, before the coup and ouster of former president Mohamed Morsi. For its part, Tunisia has been considered one of the few success stories produced by the Arab uprisings (data were collected in 2015 before the terrorist massacre of 24 people at the Bardo Museum in Tunis), which public opinion may corroborate.

There is a dissonance between supporting free speech in principle and exercising free speech in practice. More educated nationals tend to support online freedom of speech in principle, but in practice they are far less likely to say that they are comfortable voicing their own political opinions. More educated elites in some Arab countries may also have a heightened sense of the negative consequences of political dissent, especially in Egypt, Saudi Arabia, and the UAE, where dissenters are frequently under duress.

Young adults are more willing to pay for all manner of news content, despite the fact that they consume less of it than their older counterparts, they. One possible explanation for this surprising finding could be that 18 to 24 year-old respondents mostly missed the online honeymoon years when most online news content was free, and are using smartphones and tablets that cloister news behind app paywalls.

INTERNATIONAL COMPARISONS

Arab nations in a global context

Belief in the political power of the internet

Percent who believe they can have more political influence by using the internet

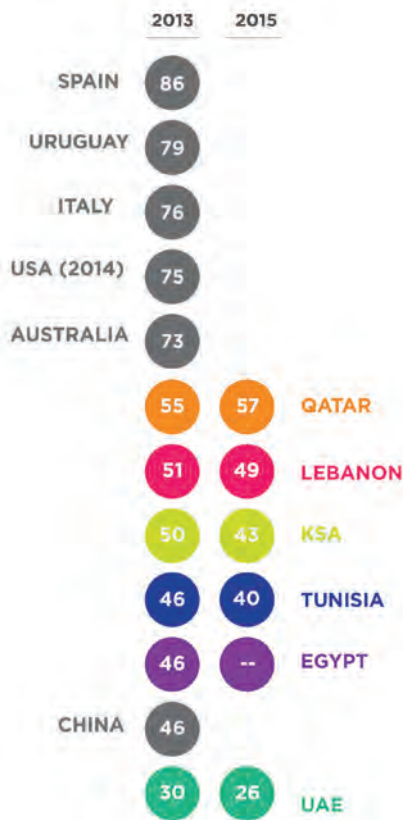| 2013	2015	
55	53	KSA
59	52	EGYPT
56	51	QATAR
CHINA 52		
SPAIN 46		
36	19	UAE
USA (2014) 42		
URUGUAY 40		
AUSTRALIA 40		
39	43	TUNISIA
37	35	LEBANON
UK 33		
ITALY 32		
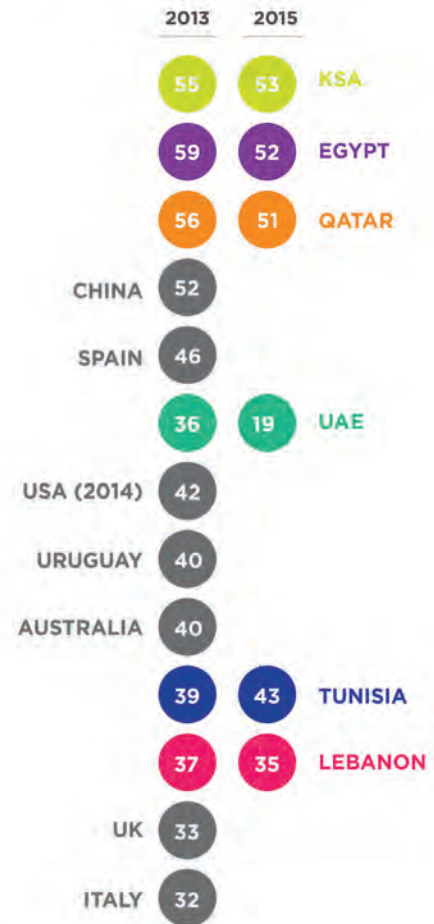
Base: Internet users only, nationals only in MENA countries

Note: in non-MENA countries "influence" worded as "power"
*In Qatar: "political influence" worded as "influence on society"

This survey included many of the "common questions" from the World Internet Project, which are asked in a variety of countries across North and South America, Europe, and Asia. Therefore we have the ability to compare not only the Middle Eastern countries in our study to each other, but also to provide points of comparison with non-Arab countries around the world. Because no other countries were able to share data collected in 2015 at the time of publishing, we used data from a variety of nations collected in 2013, the first year our study was conducted. The following charts place MENA countries into a more global context based on results from 2013. With the MENA countries in our study, 2015 numbers have been included to show how they have changed since. We look forward to seeing and similarly comparing 2015 results from other WIP countries.

Many internet users in the region feel they can increase their political influence by using the internet, even more so than respondents in some western countries. Respondents in countries ruled by autocratic governments—Saudi Arabia, Egypt, Qatar, and China—are more likely to believe in the political utility of the internet than those surveyed in countries like the UK and Italy, where democratic institutions provide established avenues for political activism and influence.
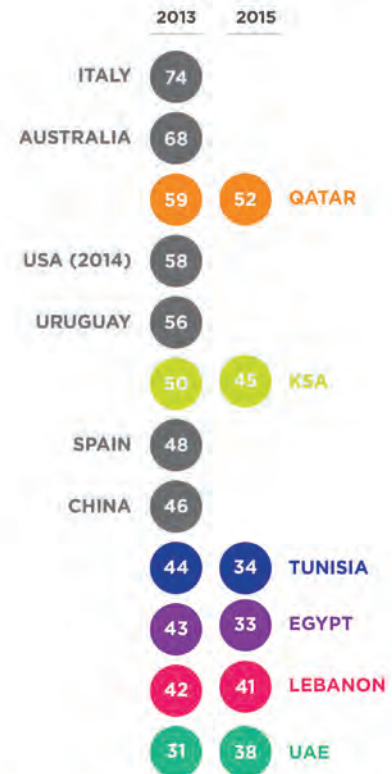
Attitudes toward political speech in principle and practice

Percent who believe people should be free to criticize governments online

	2013	2015	
SPAIN	86		
URUGUAY	79		
ITALY	76		
USA (2014)	75		
AUSTRALIA	73		
	55	57	QATAR
	51	49	LEBANON
	50	43	KSA
	46	40	TUNISIA
	46	--	EGYPT
CHINA	46		
	30	26	UAE

Base: All Respondents, nationals only in MENA countries
Note: Question not allowed in Egypt in 2015
*In Qatar "governments" worded as "powerful institutions"
*In non-MENA countries "governments" worded as "their government"

Percent who agree with the statement: "I feel comfortable saying what I think about politics"

	2013	2015	
ITALY	74		
AUSTRALIA	68		
	59	52	QATAR
USA (2014)	58		
URUGUAY	56		
	50	45	KSA
SPAIN	48		
CHINA	46		
	44	34	TUNISIA
	43	33	EGYPT
	42	41	LEBANON
	31	38	UAE

Base: All respondents, nationals only
in MENA countries
*In Qatar "politics" worded as "public issues"

Issues of free speech are often measured by the laws and institutional practices of a given nation. Instead of looking at whether people have the right or ability to speak freely about politics, here we see whether citizens themselves think people should have those rights. On the subject of criticizing governments, we again see a clear separation between autocratic and more democratic nations. The picture changes somewhat when the question refers to individual comfort with political speech.

Regulation of the internet: different responses in different contexts

Percent who say the internet should be more tightly regulated

	2013	2015	
LEBANON	63	54	
QATAR	60	67	
KSA	59	42	
CHINA	51		
UK	51		
URUGUAY	51		
ITALY	51		
TUNISIA	51	44	
EGYPT	42	49	
SPAIN	38		
AUSTRALIA	31		
UAE	29	35	
USA (2014)	23		
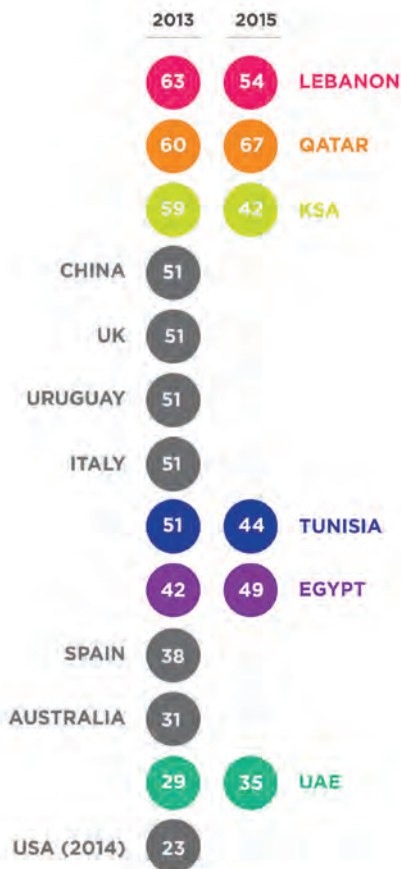
Base: Base: All respondents, nationals only in MENA countries

Percent who visit religious or spiritual websites at least once a week

	2013	2015	
KSA	63	63	
TUNISIA	42	50	
UAE	43	59	
EGYPT	64	64	
QATAR	62	79	
USA (2014)	18		
LEBANON	16	17	
CHINA	12		
AUSTRALIA	8		
SPAIN	4		
ITALY	4		
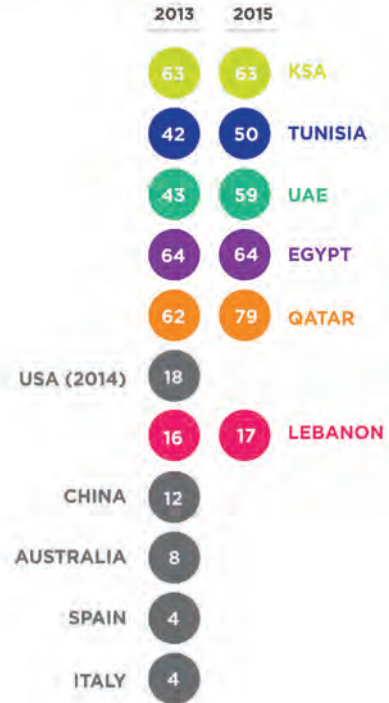
Base: Internet users only, nationals only in MENA countries.

People in the UK and Italy are more likely to want greater internet regulation than those in the UAE, Saudi Arabia, and Tunisia. What "regulation" might mean to different people in different national contexts may be a subject worthy of further inquiry. Some evidence suggests that cultural as well as political considerations should be considered. One clear indicator of cultural difference is the high use of religious content online in the Middle East. A survey of the same Arab nations in 2014, Entertainment *Media Use in the Middle East*, found high levels of support for tighter regulation of violent and romantic entertainment content.

Worry about online surveillance, official and commercial

Percent who worry about companies checking what they do online

	2013	2015	
URUGUAY	65		
USA (2014)	62		
SPAIN	52		
	44	47	KSA
AUSTRALIA	43		
ITALY	41		
	36	37	QATAR
	32	48	TUNISIA
	31	24	EGYPT
CHINA	29		
	27	25	LEBANON
	23	30	UAE
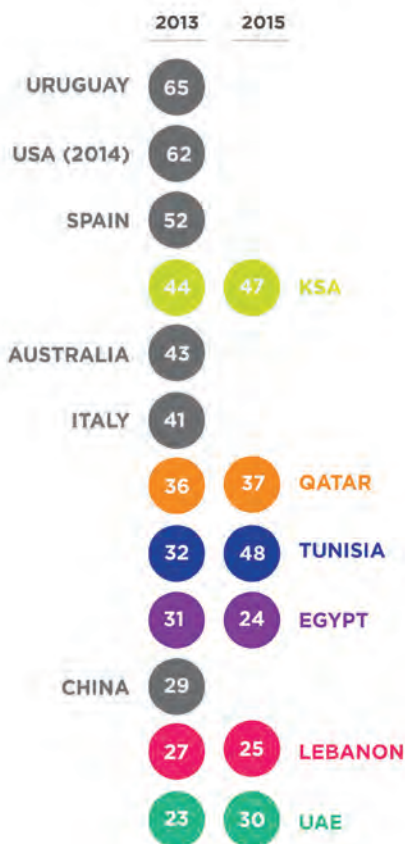
Base: Internet users only,
nationals only in MENA countries

Percent who worry about the government checking what they do online

	2013	2015	
USA (2014)	54		
URUGUAY	51		
SPAIN	46		
	46	47	KSA
ITALY	39		
	34	41	QATAR
CHINA	33		
	32	26	LEBANON
	30	42	TUNISIA
	29	26	EGYPT
AUSTRALIA	29		
	25	30	UAE
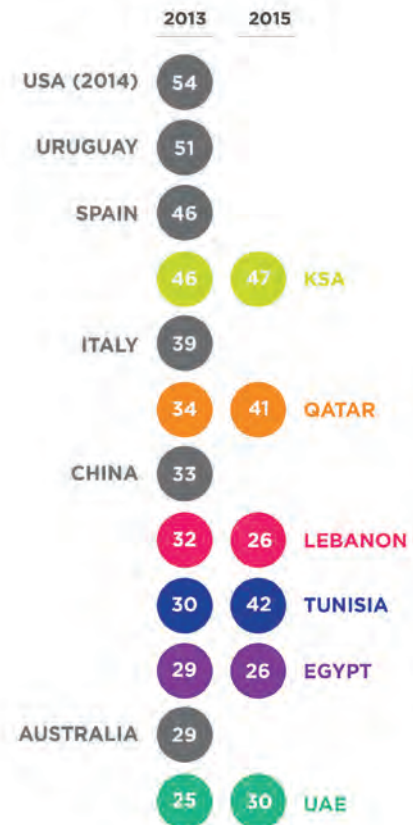
Base: Internet users only,
nationals only in MENA countries
*In Qatar: "governments" worded as "powerful institutions"

Internet users in Arab countries are less likely to fear governments or commercial entities surveilling them online than in countries like the USA and Spain. Webizens in the USA are the most concerned about governments checking what they do online, while those in the UAE are the least likely to register the same concern. In 2013, respondents in Western countries were more likely to worry about online surveillance from companies than from governments. In Arab nations, concern about government surveillance online rose modestly, if at all, in the two year period since 2013 that included major revelations about the extensive surveillance programs run by the United States government.

Turning to the internet for news without turning away from TV

Percent who say the internet is important to them as a source of news

2013	2015	
90	93	UAE
89	90	KSA
86 (URUGUAY)		
85	88	TUNISIA
84 (USA 2014)		
82	87	LEBANON
81	85	EGYPT
81 (AUSTRALIA)		
79 (SPAIN)		
75	88	QATAR
68 (CHINA)		
60 (SWEDEN)		
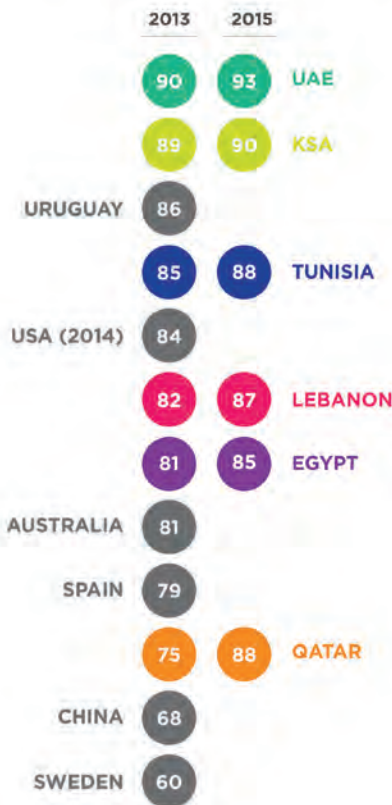
Base: Internet users only, nationals only in MENA countries

Percent who say television is important to them as a source of news

2013	2015	
93	82	KSA
91	84	UAE
87	82	LEBANON
84	63	EGYPT
71	81	TUNISIA
60 (USA 2014)		
54 (URUGUAY)		
58 (SWEDEN)		
53	66	QATAR
48 (CHINA)		
37 (AUSTRALIA)		
35 (SPAIN)		
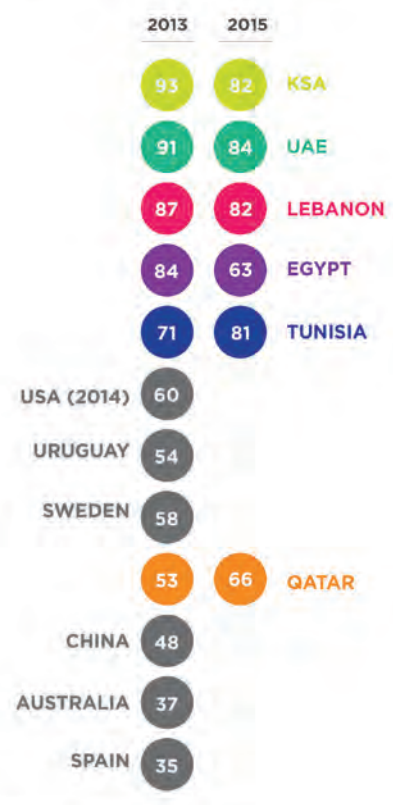
Base: Internet users only, nationals only in MENA countries

Television is overwhelmingly cited as an important source of news for people in the Middle East, even among internet users. Much more of the Arab world turns to television for information than in other regions. Television has decreased in importance from 2013 to 2015 in all Arab countries except in Qatar and Tunisia, but still more than eight in ten internet users in Lebanon, Saudi Arabia, Tunisia, and the UAE cite TV as an important source of news.

Video and music downloading most common in restrictive nations

Percent who download or stream music online at least once a week

	2013	2015	
CHINA	78		
	75	81	TUNISIA
	74	55	KSA
	61	53	UAE
	54	65	EGYPT
	52	50	LEBANON
URUGUAY	51		
USA (2014)	50		
ITALY	46		
	43	54	QATAR
SPAIN	43		
AUSTRALIA	43		
UK	40		
SWEDEN	34		
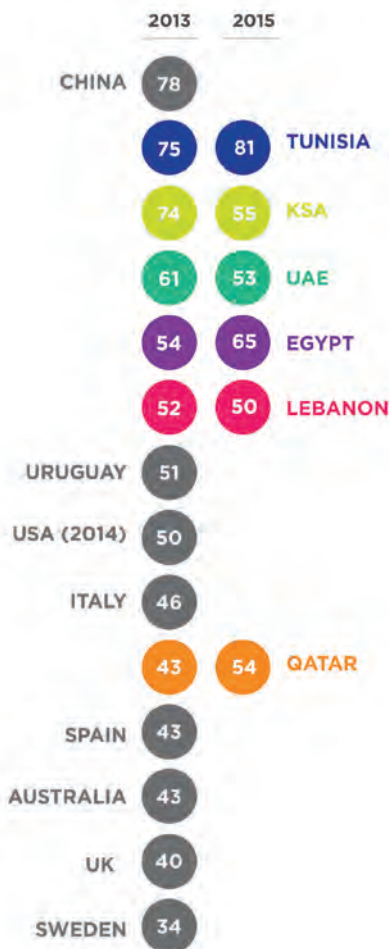
Base: Internet users only, nationals only in MENA countries

Percent who play games online at least once a week

	2013	2015	
	61	54	KSA
CHINA	59		
	52	74	TUNISIA
	52	53	UAE
	48	46	LEBANON
	46	51	EGYPT
USA (2014)	46		
ITALY	44		
UK	33		
URUGUAY	32		
AUSTRALIA	32		
	28	39	QATAR
SWEDEN	23		
SPAIN	22		
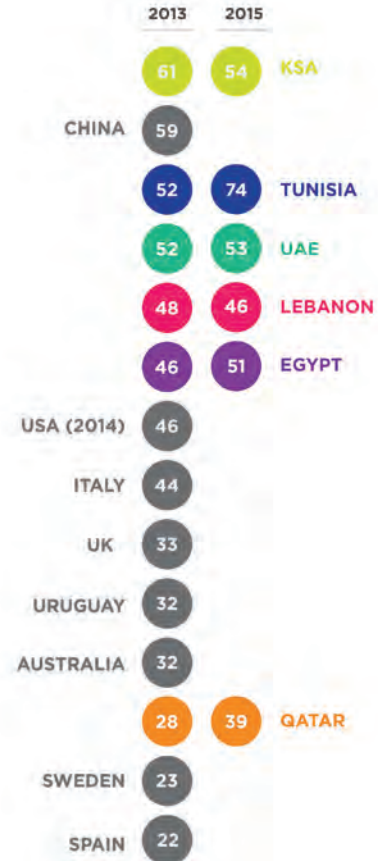
Base: Internet users only, nationals only in MENA countries

Internet users in the Arab world are far more likely to download or stream music or videos online than internet users in many other countries. One notable exception is China, which tops both lists, and which is similarly known for tight government regulation of content. Perhaps, then, it is no surprise that so many people from these restrictive countries access music and video content through the internet, which provides far more and easier ways to get around official controls.

DISCUSSION:
International Comparisons

Respondents in Arab states do not necessarily consider criticism of governments on the internet to be an assumed right. While respondents in the Arab states are among the most likely to say it is safe for individuals to discuss politics online, they are also among the least likely to support open criticism of governments on the internet.

Internet users in Arab countries are less likely to fear governments or commercial entities surveilling them online than in countries like the US and Spain. In 2013, Western nationals were more concerned about online surveillance by private companies than by governments, which was not the case in most Arab countries. The 2013 data were collected before the revelations of US surveillance programs by Edward Snowden.

As a news source, Arabs have not abandoned television. Much more of the Arab world turns to television for information than in other regions. Television has decreased in importance from 2013 to 2015 in all Arab countries except in Qatar and Tunisia. But still more than eight in ten internet users in Lebanon, Saudi Arabia, Tunisia, and the UAE cite TV as an important source of news.

People in restrictive countries rely heavily on the internet for videos and music. Internet users in China and the Arab world, where regulation of content is far stricter than in Western countries, are more likely to download or stream music or play games online than internet users in many other countries.

FOCUS ON QATAR

Unique demographics and culture, highly connected and distinct media users

In this chapter

- Qataris: the most-traveled, most conservative national citizens

- Highly connected and distinctive web users

- Use of English drops for both internet and TV use

- Highest support tightening internet regulation; mixed attitudes toward free speech

Qataris: the most-traveled, most conservative national citizens

Qataris are nearly 6 times more likely than other nationals to travel outside the Middle East

Percent who traveled outside the Middle East in past 3 years

63% Qataris
11% Average among other 5 countries

Of those who traveled outside the Middle East in past 3 years, average number of trips

5 Qataris
2 Average among other 5 countries

Base: Nationals only

Qataris more likely to consider themselves culturally conservative than others in the region

Percent who describe themselves as either conservative, progressive, or neither

- Conservative
- Neither
- Progressive
- Don't know/refused

Qataris
75% Conservative
9% Neither
16% Progressive

Average among other 5 countries
56% Conservative
23% Neither
15% Progressive
6% Don't know/refused

Base: Nationals only

Qataris share many characteristics with the region as a whole, but stand apart with several traits and preferences. Notably, Qataris travel outside the Middle East nearly six times more often than other nationals in the region (63% vs. 11% have traveled outside the region in past three years).

Despite the perception that global travel is associated with more progressive attitudes, Qataris are likely to identify themselves as more culturally conservative than other Arab nationals (75% vs. 56%).

Qataris show strong interest in religious/spiritual information, especially online content, compared to other nationals in the region. Over half of Qataris say they access religious/spiritual sites daily (54% vs. 22% of others), as well as look for religious information online daily (57% vs. 28% of others). More than half (56%) also watch religious/spiritual content on TV, similar to other nationals, but Qataris are more likely to watch religious videos online (53% vs. 28%). Additionally, three in four Qataris express interest in religious and spiritual news (77%) compared to 55% of other nationals.
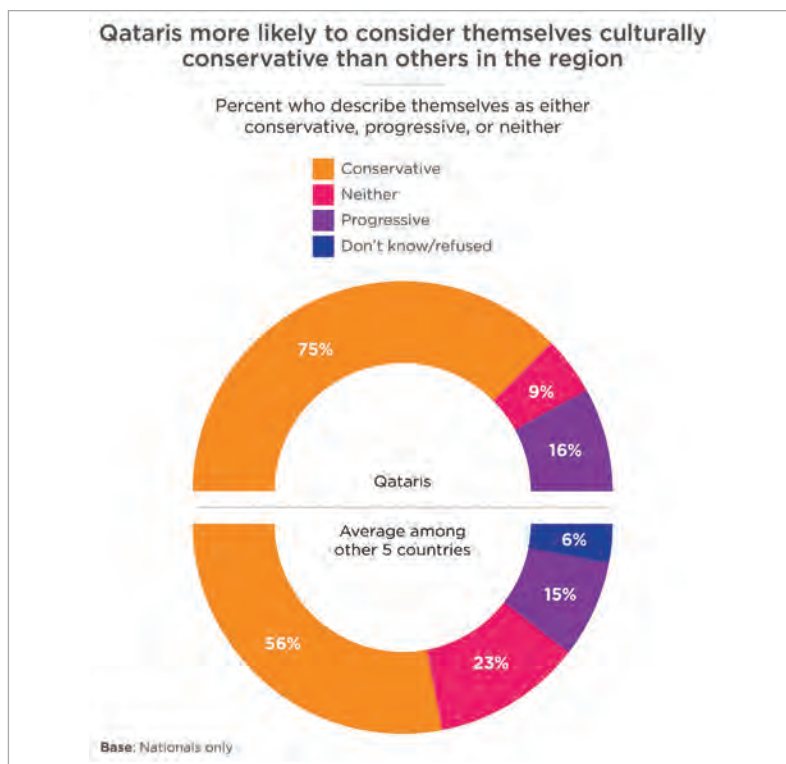
Both men and women express interest in religious and spiritual news equally, but female Qataris watch more religious and spiritual videos on television (66% vs. 46%) and online (65% vs. 42%) than males.

Highly connected and distinctive web users

Younger Qataris are more likely to use English for both traditional and digital media

Percent who use English to access media

- Internet
- TV
- Radio
- Newspaper

	Internet	TV	Radio	Newspaper
18-34	43%	37%	16%	15%
35+	29%	24%	10%	6%

Base: Qatari nationals, use each medium

Facebook use far lower in Qatar than any other country surveyed

- 2013
- 2015

	Tunisia	UAE	Eygpt	KSA	Lebanon	Qatar
2015	91%	88%	87%	86%	81%	47%
2013	99%	95%	81%	90%	92%	47%

Given the high amount of travel outside the region, it may be understandable that Qataris are also high users of English media. This is especially true of younger Qataris. Of those under 34 years old, 43% use English to access the internet, and 37% watch TV in English.

Qataris spend more time online than other Arab nationals (32 hours per week vs. 25 hours). This includes more time online socializing with family (11 hours vs. 7 hours) and colleagues (9 hours vs. 5 hours).

Similar to those in other countries, Qataris are not passive online consumers. Most use the internet daily to post messages/comments via social media, post their own multimedia content, repost or share links, and check email. Qataris are much more likely than other nationals in the region to access religious/spiritual sites daily (54% vs. 22%), seek health information (55% vs. 27%), and read/watch religious information (57% vs. 28%). Furthermore, Qataris report increases in most online activities since 2013, including downloading videos and listening to online radio.
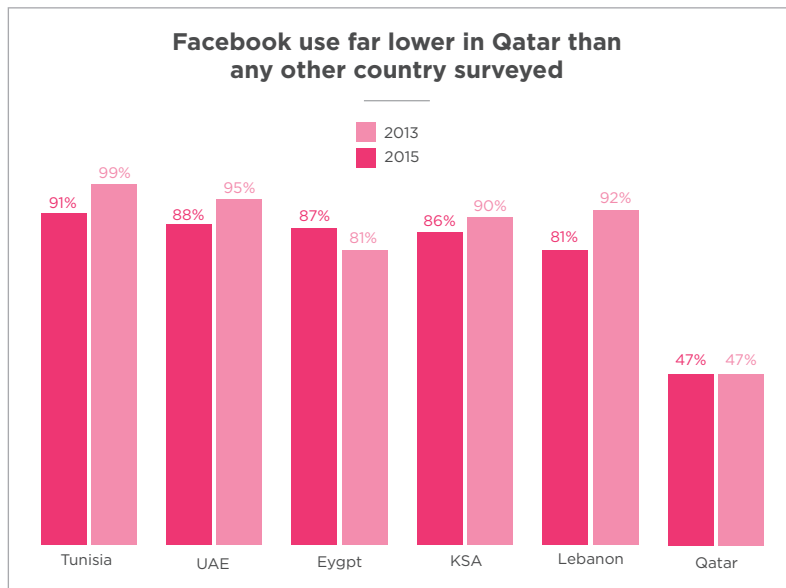
Far fewer Qataris use Facebook than other nationalities in the study (47% vs. 86%). Also, more Qataris use Snapchat (34% vs 4%) and Instagram (62% vs 25%) than other nationals. Instagram use among Qataris is up considerably from 2013 (34% in 2013 vs. 62% in 2015). Male internet users in Qatar are somewhat more likely to use Facebook than women (52% vs. 42%), and less likely to use Instagram (56% vs. 69%).

Qataris consume comedy and news/documentary internet content most often, which differs from nationals in all other countries; in the UAE, social satire tops the list, and in Saudi Arabia comedy is the top choice. Enigmatically, Qataris are among the most likely in the region to watch news online, but are least likely to share news content online (35%, vs. 62% of other nationals in the region).

Use of English for drops both internet and TV use

Use of English dropped on the internet and for watching TV among Qataris

In 2013 and 2015, percent who use English to access...

■ The internet
■ TV

56%
47%
38%
32%

2013   2015

Base: Qatari nationals, use each medium
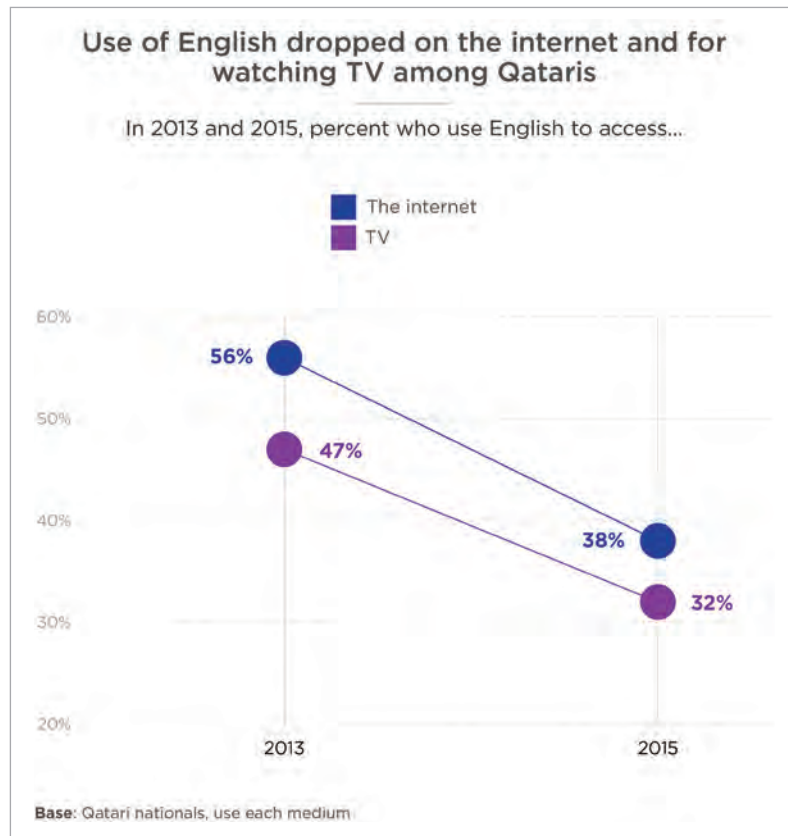
About one in three use English to access the internet and television, a considerable drop since 2013. English use for television among Qataris fell from 47% to 32% between 2013 and 2015, the biggest change of all countries surveyed. During this period, Qatar's national television stations have undergone significant overhauls and improvements, and government organizations have subsidized and promoted the production of digital content. It is possible that more and higher quality Arabic content is allowing nationals to consume satisfying content in their native tongue.

When reporting their favorite news organization, only 6% of Qatari nationals say the primary language of the outlet is English. However, this is six times higher than for any other country.

Highest support for tightening internet regulation; mixed attitudes toward free speech

In Qatar, 18-24 year-olds support free speech online but are less comfortable expressing personal views; opposite is true of 25-34 year-olds

Percent who agree with statement

- ■ It is okay for people to express their ideas on the internet, even if they are unpopular
- ■ In general, I feel comfortable saying what I think about public issues

67% (18-24) → 52% (25-34)
48% (18-24) → 60% (25-34)

Base: Qatari nationals, age 18-34

25-34 year-olds increasingly worried about being monitored online by powerful institutions

Percent who agree: "I am worried about powerful institutions checking what I do online"

- ■ 2015
- ■ 2013

18-24: 37 (2015), 36 (2013)
25-34: 51 (2015), 34 (2013)
35+: 35 (2015), 33 (2013)

Base: Qatari nationals, internet users

Nearly six in ten Qataris say it is OK for people to express their ideas on the internet, even if they are unpopular. This is more than Tunisia and Egypt but consistent with other countries. Fifty-seven percent believe in freedom to criticize powerful institutions on the internet (asked as right to criticize "powerful institutions" in Qatar, phrased as "government" in all other countries).

Qataris' support for free speech online decreases with age, but comfort expressing personal political opinions increases. Eighteen to 24 year-olds are more likely to support free speech online in theory, but they are less comfortable expressing their own personal views; the opposite is true of 25-34 year-olds. However, despite more comfort expressing their own views, 25-34 year-olds are more concerned about being monitored online by external sources like companies (33% 18-24 vs. 45% 25-34) and powerful institutions (37% 18-24 vs. 51% 25-34).

A slight majority believes expressing opinions about public issues is safe, and feel comfortable doing so (53% and 52%, respectively, more than all other countries, though "public issues" was worded as "politics" in all other countries). Qataris are somewhat less comfortable talking about public issues today than in 2013 (59% vs. 52% in 2015).
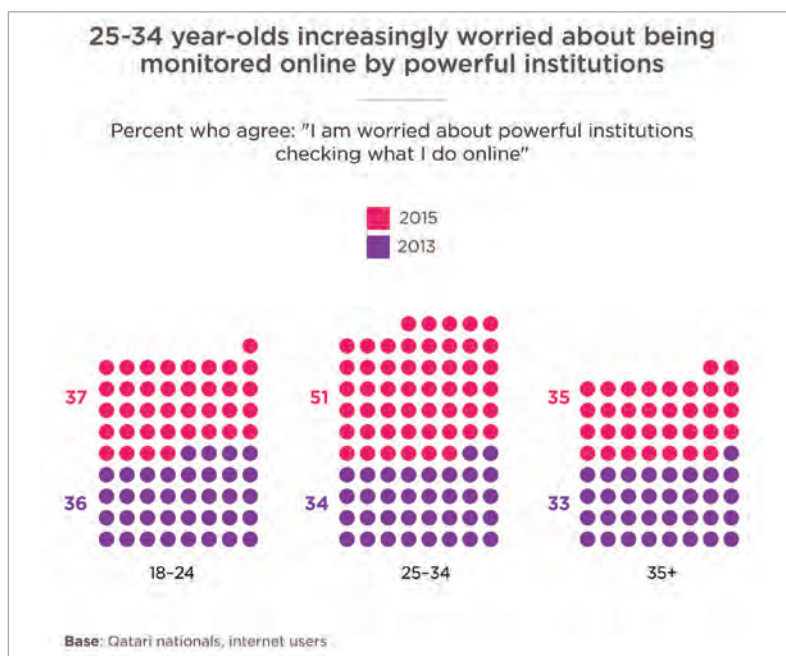
Many Qataris worry about companies (37%) and powerful institutions (41%) checking their online activity. Perhaps consequently, two in three Qataris support tighter internet regulation, higher than all other countries (67% vs. 47%). Notably, both Qataris' concern about surveillance and their support for internet regulation have increased over the past two years (60% in 2013 vs. 67% in 2015 and 34% in 2013 vs. 41% in 2015, respectively).

DISCUSSION:
Focus on Qatar

Female Qataris watch considerably more religious content on TV and online than males. In Qatar, as in other conservative Muslim countries, men tend to have more social and physical proximity to religious figures such as imams and sheikhs. With fewer opportunities to access or engage religious leaders in person, it may be possible that Qatari women seek religious programming to compensate for this lack of physical proximity.

Facebook is much less popular among Qataris than other nationals surveyed. Like many Gulf societies, Qatar is socially conservative and places particular value on familial and individual privacy. Facebook, with its reputation for lack of privacy controls, is less popular in Qatar than in other countries, and Snapchat, which presumably has greater privacy protections, is appealing and growing. Privacy has an even more important social value for women in Qatar and, correspondingly, Qatari women use Facebook less than men.

Fewer Qataris are using English content on television and online than in 2013. This reduction of English use was observed in Lebanon and Tunisia as well, and could be associated with increased availability of high-quality Arabic programming.

Qataris support online freedom of speech but also want tighter regulation of the internet. People often support freedom of speech conceptually but are more supportive of abridgment of speech in their own communities or countries. The regulation question asked whether respondents want the internet to be more tightly regulated in their country, and two in three survey participants said yes. Qataris seem to support free speech online, but with limits.

CONCLUSIONS AND DISCUSSION

This 2015 report features the first longitudinal view of media use and related political attitudes in the Middle East, as it replicates many of the questions asked in our first survey conducted in 2013. It is, however, a first view. Although comparing responses to questions at the bookends of a two-year period may bring into focus some notable insights, doing so is one step in observing a longer, incremental arc of social and behavioral change. To draw grand conclusions from these two points of reference may be a bridge too far, but we are able to observe patterns worth highlighting, discussing, and, we hope, investigating further.

Contact us with any questions or comments at *mideastmedia@qatar.northwestern.edu.*

Freedom of Speech and Political Empowerment

- **Comfort with political expression dropped most in post-revolutionary countries.** The two countries most affected by the Arab uprisings, Egypt and Tunisia, saw the biggest drops in individuals who said they felt comfortable expressing their political opinions. Tunisia had the biggest drop in respondents who said it is safe to say whatever one thinks about politics; in Egypt, authorities did not allow the question to be asked at all.

- **More Qataris and Tunisians worry about governments checking their online activity in 2015 than two years ago.** A new omnibus cybercrime law was introduced in Qatar in 2014 which allows criminal prosecution for online defamation, even if the offending speech is true, and prison sentences for the vaguely-defined offense of harming, "principles of social values" with online speech. Prior to 2011, Tunisia's online government surveillance and censorship was among the strictest in the world. It is therefore curious that Tunisians are increasingly concerned about online monitoring.

- **A belief that the internet can increase one's political influence fell in Egypt, Qatar, and the UAE.** Continued government persecution of online rights activists in Egypt since 2013 may have had a chilling effect on beliefs of the internet's political utility. Qatar instituted a cybercrime law in 2014 with formidable criminal penalties for online dissent, and the UAE enhanced enforcement of a cybercrime law in 2012. In March 2013 (at least a month after our survey fieldwork was conducted that year), 94 political activists in the UAE were put on trial in a much-discussed ordeal in Abu Dhabi.

Social Media

- **Frequent users of social media give higher ratings to news media - a sign of discernment?** Respondents cite social media as an important source of news but express reservations about the quality of the information. As social media contain content of all sorts, including professionally produced journalism, amateur material that goes viral, as well as personal information and hearsay from friends and family, it is problematic to consider platforms such as Facebook, Twitter, or WhatsApp a single source. The quality of the information one receives via social media is largely dependent on the associations made by the individual user. People who use social media the most rate the credibility of news media significantly higher — perhaps a sign that sourcing good information on social media is as much a skill as it is elsewhere.

- **Fear may thwart social media use.** Social media use is positively associated with both a support for freedom of expression and a belief that using the internet can be politically empowering. At the same time, those who say they are not comfortable voicing their own political opinions are less likely to use social media. Similarly, those who say it is not safe to express political opinions are less likely to use social media.

- **Women report spending a greater portion of their time socializing with friends online,** while men tend to socialize with their friends more in person. It may be worth considering the norm in some Arab countries, particularly the Arab Gulf, that encourages women to spend less time in the public sphere, while groups of men will gather in cafes and plazas.

Credibility of News Media

- **More people say national news in their country are credible than did in 2013.** At the same time, fewer people said the quality of news reporting in the Arab world had improved. Some may argue we are seeing evidence of an orientation away from pan-Arab content and toward a more insular nationalism, others that national news organizations are finally starting to match the quality and sophistication of pan-Arab channels such as Al Jazeera and Al Arabiya.

- **Prosperity and stability may be linked to perceptions of national news credibility.** Egyptians, who have experienced years of political turmoil including infamous crackdowns on journalistic organizations, are less confident than others that the news media in their country are credible. In contrast, those in stable and prosperous UAE hold extremely positive views of their news media and also feel they receive favorable coverage in the international press.

- **After years of turmoil, crackdowns, and tough coverage, Egyptians hold negative views of many news media.** It is not just their own media that Egyptians hold in low esteem, they are also the least likely to believe that people benefit from consuming news produced by foreign organizations. The long and politicized ordeal of Al Jazeera's coverage of the Egyptian revolution and counter-revolution must be considered.

- **Perceptions of national media credibility and independence have declined in Saudi Arabia.** Coincidentally or not, Saudis are more likely to prefer news organizations from outside the country.

Key Indicators of Media Use

- **The internet may be starting to chip away at the dominance of TV.** While TV is still cited as an important source of news more often than the internet, the margin is shrinking. In Qatar and Saudi Arabia, two of the three most wired countries, "only" 90% and 93% (respectively) of 18-24 year-olds say they watch TV at all, compared to nearly 100% in other countries.

- **Comedy is the most popular TV genre in all countries except Qatar and Tunisia,** where news is more commonly watched. Notably, when asked about online video, more Tunisians and Saudis say they watch social satire than news, or even comedy itself.

- **The internet is mobile in the Middle East, too.** As in many parts of the world, more people access the internet on a phone than on a computer in all nations except Egypt, which has the lowest internet penetration of all countries surveyed.

Book reading is on the rise. 36% of nationals said they read books, a considerable increase from 25% in 2013. Coupled with a decline in the use of English on the internet that was especially pronounced among those without a university diploma, one might consider whether these are results of improved national education systems, Arabic literacy programs, or a growing embrace of national or Arabic culture.

Profiles of Media Users

- **Nationals are nearly as likely to see international news bias as being tilted in favor of their country as against it.** Lebanese are most likely to see bias against their country. It is possible that Lebanese feel the country's unstable political environment obscures the many desirable aspects of Lebanon which, for example, make Beirut one of the most vibrant capitals in the region. In the small, stable, predominantly wealthy Gulf countries of Qatar and UAE, nationals are more likely to think international news bias works in favor of their countries than against it.

- **The greatest increase in national optimism occurred in countries most affected by the "Arab Spring."** Egyptians and Tunisians recorded the largest increase in belief that their country is headed in the right direction. Greater pessimism existed in Egypt in 2013, it appears, before the coup and ouster of former president Mohamed Morsi. For its part, Tunisia has been considered one of the few success stories produced by the Arab uprisings (data were collected in 2015 before the terrorist massacre of 24 people at the Bardo Museum in Tunis), which public opinion may corroborate.

- **There is a dissonance between supporting free speech in principle and exercising free speech in practice**. More educated nationals tend to support online freedom of speech in principle, but in practice they are far less likely to say that they are comfortable voicing their own political opinions. More educated elites in some Arab countries may also have a heightened sense of the negative consequences of political dissent, especially in Egypt, Saudi Arabia, and the UAE, where dissenters are frequently under duress.

- **Young adults are more willing to pay for all manner of news content,** despite the fact that they consume less of it than their older counterparts, they. One possible explanation for this surprising finding could be that 18 to 24 year-old respondents mostly missed the online honeymoon years when most online news content was free, and are using smartphones and tablets that cloister news behind app paywalls.

International Comparisons

- **Respondents in Arab states do not necessarily consider criticism of governments on the internet to be an assumed right.** While respondents in the Arab states are among the most likely to say it is safe for individuals to discuss politics online, they are also among the least likely to support open criticism of governments on the internet.

- **Internet users in Arab countries are less likely to fear governments or commercial entities surveilling them online** than in countries like the US and Spain. In 2013, Western nationals were more concerned about online surveillance by private companies than by governments, which was not the case in most Arab countries. The 2013 data were collected before the revelations of US surveillance programs by Edward Snowden.

- **As a news source, Arabs have not abandoned television.** Much more of the Arab world turns to television for information than in other regions. Television has decreased in importance from 2013 to 2015 in all Arab countries except in Qatar and Tunisia. But still more than eight in ten internet users in Lebanon, Saudi Arabia, Tunisia, and the UAE cite TV as an important source of news.

- **People in restrictive countries rely heavily on the internet for videos and music.** Internet users in China and the Arab world, where regulation of content is far stricter than in Western countries, are more likely to download or stream music or play games online than internet users in many other countries.

Focus on Qatar

- **Female Qataris watch considerably more religious content on TV and online than males.** In Qatar, as in other conservative Muslim countries, men tend to have more social and physical proximity to religious figures such as imams and sheikhs. With fewer opportunities to access or engage religious leaders in person, it may be possible that Qatari women seek religious programming to compensate for this lack of physical proximity.

- **Facebook is much less popular among Qataris than other nationals surveyed.** Like many Gulf societies, Qatar is socially conservative and places particular value on familial and individual privacy. Facebook, with its reputation for lack of privacy controls, is less popular in Qatar than in other countries, and Snapchat, which presumably has greater privacy protections, is appealing and growing. Privacy has an even more important social value for women in Qatar and, correspondingly, Qatari women use Facebook less than men.

- **Fewer Qataris are using English content on television and online than in 2013.** This reduction of English use was observed in Lebanon and Tunisia as well, and could be associated with increased availability of high-quality Arabic programming.

- **Qataris support online freedom of speech but also want tighter regulation of the internet.** People often support freedom of speech conceptually but are more supportive of abridgment of speech in their own communities or countries. The regulation question asked whether respondents want the internet to be more tightly regulated in their country, and two in three survey participants said yes. Qataris seem to support free speech online, but with limits.

Appendix A:
METHODOLOGY

The results for the *Media Use in the Middle East, 2015* by Northwestern University in Qatar are based on N=6,093 face-to-face and telephone interviews across six countries, conducted under direction of Harris Poll, in conjunction with Pan Arab Research Center (PARC). The survey was conducted among the general population 18 years and older in six countries in the Middle East: Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia, and the UAE. All fieldwork was conducted between February 3 and March 9, 2015. This is the third wave of the *Media Use in the Middle East* survey. The 2015 survey replicated many of the questions included in the 2013 survey; longitudinal comparisons are provided when applicable. The 2014 survey focused on entertainment media in the Middle East and is only referenced in a small number of questions.

Data in all countries were collected via face-to-face interviews, except in Qatar, where telephone interviews were employed via random-digit dialing. Multistage random probability sampling was used in Egypt, Lebanon, Saudi Arabia, Tunisia, and the UAE. The six countries were chosen to represent a broad spectrum of populations across the Arab region, including those in the Arab Gulf, North Africa, and the Levant.

Sampling procedures varied somewhat by country, but the methodology was designed to ensure representation of the national adult population in each country, which included citizens only in some countries (Egypt and Lebanon), and both citizens and expatriates in the other countries (Qatar, Saudi Arabia, Tunisia, and the UAE). Groups not represented in the sample include: visitors with no residence permit, farmers, servants, the mentally disabled, and those in army barracks, hospitals, dormitories, prisons, or labor camps. In Lebanon, residents in areas with heavy Hezbollah presence were also excluded.

The average interview length was 30 minutes, with variations based on language and number of questions asked. The total number of questions asked varied based on responses to previous questions. For example, some questions were asked only of internet users, those who used a particular type of media, or those who are employed.

A summary of completed interviews and response rates by country for 2013 and 2015 appears on page 86.

Rim weighting was applied in all countries surveyed to bring the data in line with the population in each country. The weighting factors include gender by age, age by nationality, and gender by nationality.

While data within countries were weighted to be representative, the overall sample of 6,093 was not weighted across countries. The data file includes an unweighted "average" of all survey respondents. Weighting across countries was not applied due to the large variance in population across participating countries.

Details about the sample and methodology in each of the participating countries are provided below. The descriptions show margin sampling of sampling error based on all interviews conducted in each country, supporting a 95% confidence level. For results based on the full sample in a given country, one can say with 95% confidence that the error attributable to sampling and other random effects is plus or minus the margin of error.

Country	Completed interviews		Response Rate %		Completed interviews by nationality		
	2013	2015	2013	2015		2013	2015
Egypt	1252	1071	92%	97%	Nationals Non-nationals	1252 0	1071 0
Lebanon	1256	1000	70%	54%	Nationals Non-nationals	1232 24	995 5
Qatar	1253	1000	54%	53%	Nationals Non-nationals	352 901	280 720
Saudi Arabia	1252	1005	81%	77%	Nationals Non-nationals	848 404	633 372
Tunisia	1250	1012	21%	85%	Nationals Non-nationals	1150 100	909 103
United Arab Emirates	1264	1005	70%	86%	Nationals Non-nationals	313 951	250 755
Total	**7257**	**6093**					

Total Sample
- **Sample size:** 6093
- **Gender split:** 52% male, 48% female
- **Mean age:** 35 years old
- **Margin of Sampling Error:** +/- 1.3 percentage points

Egypt
- **Sample design:** Multi-stage random probability sampling procedure. Sample derived from CAPMAS master sample of households
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic
- **Fieldwork dates:** February 13 – 21, 2015
- **Sample size:** 1071
- **Gender split:** 50% male, 50% female
- **Mean age:** 36 years old
- **Margin of Sampling Error:** +/- 3.0 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Lebanon
- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic
- **Fieldwork dates:** February 3 – March 5, 2015
- **Sample size:** 1000
- **Gender split:** 49% male, 51% female
- **Mean age:** 36 years old
- **Margin of Sampling Error:** +/- 3.1 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps, and potential respondents in areas with heavy Hezbollah presence

Qatar
- **Sample design:** Randomized sample within the household using a constant fraction sampling procedure
- **Mode:** Phone, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 11 – March 1, 2015
- **Sample size:** 1000
- **Gender split:** 56% male, 46% female
- **Mean age:** 34 years old
- **Margin of Sampling Error:** +/- 3.2 percentage points
- **Representative:** Adult population, less those in army barracks, hospitals, dormitories, and prisons

Saudi Arabia
- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 12 – March 9, 2015
- **Sample size:** 1005
- **Gender split:** 53% male, 47% female
- **Mean age:** 34 years old
- **Margin of Sampling Error:** +/- 3.2 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Tunisia

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, French
- **Fieldwork dates:** February 17 – March 6, 2015
- **Sample size:** 1012
- **Gender split:** 51% male, 49% female
- **Mean age:** 37 years old
- **Margin of Sampling Error:** +/- 3.1 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps.

United Arab Emirates

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 14 – March 6, 2015
- **Sample size:** 1005
- **Gender split:** 53% male, 47% female
- **Mean age:** 33 years old
- **Margin of Sampling Error:** +/- 3.3 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Margin of sampling error = 1.96* sqrt ((50%*(1-50%)/n)). Reported margins of error take into account data weighting.

A more detailed summary of the methodology, sample and weighting can be found at mideastmedia.org

Appendix B:
RELATED RESEARCH

There is a growing body of research on media use in the Middle East. Below are some of the studies we have found useful.

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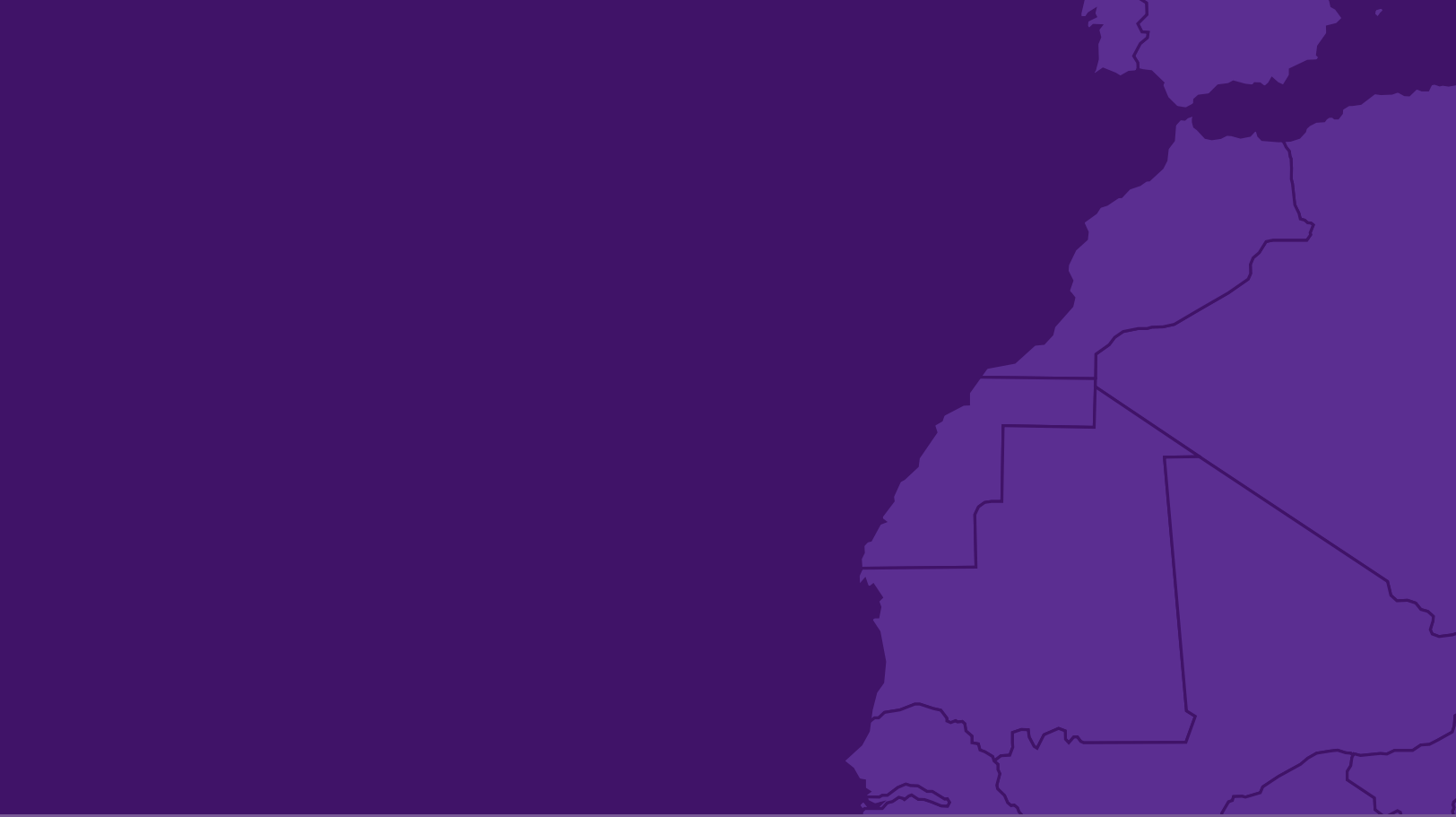
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