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DOHA FILM INSTITUTE

# MEDIA USE IN THE MIDDLE EAST 2016

A Six-Nation Survey

Northwestern University in Qatar was founded in 2008 by parent organization Northwestern University in Evanston, Illinois, in partnership with the 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.

Doha Film Institute is an independent, not-for-profit cultural organisation. It supports the growth of the local film community through cultivating film appreciation, enhancing industry knowledge, and contributing to the development of sustainable creative industries in Qatar. The Institute's platforms include funding and production of local, regional, and international films; skills-sharing and mentorship programmes; film screenings; the Ajyal Youth Film Festival; and Qumra. With culture, community, learning, and entertainment at its foundation, the Institute is committed to supporting Qatar's 2030 vision for the development of a knowledge-based economy.



# **MEDIA USE IN THE MIDDLE EAST 2016**

**A Six-Nation Survey**

Conducted by:

Northwestern University in Qatar

Led by Everette E. Dennis, Justin D. Martin, and Robb Wood,  
with Marium Saeed

In partnership with Doha Film Institute

In association with Harris Poll

Find this report and other studies on media use and media industries in the Middle East, including an interactive feature that allows custom exploration of the data, at

**[mideastmedia.org](http://mideastmedia.org)**





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# FOREWORD

Recognizing a need for systematic data to track media use and attitudes in the Middle East, Northwestern University in Qatar (NU-Q) and Doha Film Institute (DFI) undertake this study for the benefit of academia, media industries, other institutions, and the public at large. We do so both in our own self-interest as institutions devoted to learning and advancing knowledge about media and as a public service making data available to researchers and citizens everywhere.

The annual *Media Use in the Middle East* survey moves beyond an individual faculty enterprise to bring together and reflect efforts from throughout the whole school to develop and disseminate this distinctive institutional NU-Q product. It is both a research deliverable and a basis for thoughtful leadership and discussion with media experts across the Middle East region. The collaborative research process includes considerable consultation with students and with expert members of the NU-Q faculty, several of whom are noted authorities not only on media, but also on cultural and legal trends across the Middle East region.

With some oversight from Dean Dennis, the work is mostly the product of two able and energetic NU-Q colleagues, Justin Martin and Robb Wood. They were assisted this year by Marium Saeed, an NU-Q graduate. Their work, which draws from the knowledge of many constituencies, represents the best of rigorous, rapid-response research and is a model for timely, real-time results. The study is refined and conceptualized in early fall, fieldwork and data collection are carried out in winter, and by spring, results are analyzed and the report is written.

DFI's support of and work on these entertainment-focused surveys both for 2014 and 2016 represent one way to contribute the insights and professional expertise accumulated at the Institute since its founding. Institutional, hands-on knowledge of the region's entertainment industry accumulates with each project, program, and event, and

consultations on the survey throughout the year have proven an effective way to put this knowledge into a broader, useful context. We thank DFI's working group including Khalil Benkirane, Chadi Zennedine, Lauren Mekhael, and Hanaa Issa, and others who have participated in both the drafting and refinement of survey questions and in the interpretation of results.

From the beginning, the Harris Poll (now part of The Nielsen Company) has carried out the fieldwork and been thoughtful colleagues in the reporting process. Their work in securing permissions to conduct the survey is notable in a region where such authorization is not easy.

The data we gather goes well beyond Qatar and the Middle East, as it contributes to the World Internet Project of which NU-Q is a member and which provides us access to the global resources of that collaborative enterprise led by Jeffrey Cole of the University of Southern Annenberg School's Center for the Digital Future.

Each year, this study is presented at the Qatar Media Industry Forum, a group that brings together leading individuals and organizations from across Qatar's growing media sector, as well as at Northwestern's home campus in Evanston, Illinois, and at several academic meetings. Over the years, the academic audiences have included the Association for Education in Journalism and Mass Communication (AEJMC), the International Communications Association (ICA), and the American Association for Public Opinion Research (AAPOR). This year the report was previewed at the International Press Institute's World Congress and at the World Media Summit and will also be presented at AEJMC and the International Association for Media and Communication Research (IAMCR) conferences.

We are especially pleased that students and faculty members at NU-Q and at other universities are using the data for secondary analysis, creatively repurposing the material, raising new questions about the data and their meanings. Media professionals in industries ranging from satellite television to film production and the public sector, report that they, too, use the material as part of their decision-making processes.

In sum, it is our hope that this 2016 edition of *Media Use in the Middle East* will contribute to a continuing conversation among scholars, professionals, institutions, and individuals leading to a greater understanding of how people use and interact with media.

As always, we welcome comments and questions, knowing that previous comments and questions have redounded to improvements and refinements in the study.

This study and the three that preceded it, as well as our other collaborative study on the Middle East's media industries, are found along with interactive features that empower users to explore specific topics in great depth, at [www.mideastmedia.org](http://www.mideastmedia.org).



**Everette E. Dennis,**  
Dean and CEO,  
Northwestern University in Qatar



**Fatma Al Remailhi,**  
CEO,  
Doha Film Institute

# INTRODUCTION

Any understanding of the role communication media play among individuals, institutions, nation-states, and society itself requires grounding in how people use media to communicate with others and seek news, opinions, entertainment, and even commercial messages.

These objectives guide Northwestern University in Qatar's annual *Media Use in the Middle East* studies. This 2016 report continues to chart a course toward fuller appreciation of media of all kinds, from so-called legacy or traditional media to digital and social media and direct messaging. This survey, conducted in six countries—Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates—among over 6,000 individuals contributes to a portrait of regional differences and change, sometimes incremental, sometimes dramatic, and therefore is the preeminent study of media use in Arab countries. Generous funding comes from a continuing grant from the Qatar National Research Fund and from our partner in both the 2014 and 2016 surveys, Doha Film Institute.

When after a year of careful study, the first *Media Use in the Middle East* survey was published in 2013, we were conscious of the digital divide between media-rich and media-poor nations represented in our sample. In the days after the Arab revolutions of 2011 and beyond, the degree to which people could participate in the communication process and express themselves freely was and is an important indicator not just of media use per se, but of freedom of expression itself.

In 2013 and 2015 the study was titled, *Media Use in the Middle East*; the 2014 effort was designated *Entertainment Media Use in the Middle East*, reflecting different emphases of the effort in an alternate year. We alternate the focus of our *Media Use* studies somewhat each year to reflect the interests of the degree programs in our school—one in journalism and one in communication.

In odd-numbered years, the study examines news and information use as well as related cultural

and political attitudes. Among the social science indicators in those surveys are online political efficacy, perceptions of media credibility, and beliefs about media bias. In even-numbered years, the study focuses on entertainment media use, including film, television, music, video games, and many forms of digital media. We also give treatment to attitudes about government regulation of sensitive material, appraisals of the moral values in films from different parts of the world, and perceptions of benefits to viewing entertainment from outside the region.

It is too often assumed anyone can communicate via the internet or share in the benefits of easily available newspapers and free-to-air television or radio; this is not always true. Lower internet penetration and mobile broadband access in countries like Egypt and Tunisia, for example, stand in sharp contrast to that of the UAE, Saudi Arabia, and Qatar.

The 2016 report brings some good news about a narrowing digital divide between these countries, along with significant gains in internet connectivity in every country studied except Tunisia, where internet access has stagnated since 2014. Six in 10 Egyptians now use the internet, considerably more than the share of Tunisians online, but just three in 10 Egyptians have access to, or choose to use, mobile broadband. It is ironic that the two countries most closely linked to the Arab uprisings—Tunisia, where the uprisings began and Egypt, the location of the most publicized revolution—are still struggling to be fully enfranchised into the digital age.

Where access to digital content is a given, some observers express concern that the availability of news and entertainment from outside Arab countries erodes ties to one's own culture and history. While it is true people in the Middle East have more media choices than ever, this has not impaired local media creation and appeal. In fact, the opposite may be true. Interest in and consumption of media from the Arab world is increasing. Arab consumers may be intrigued by Hollywood action films, Turkish dramas, and

the pageantry of Bollywood, but they also want news and entertainment that is locally produced and sensitive to cultural norms and traditions. Furthermore, the idea that English is becoming the universal language is not borne out in these data, as almost all national respondents in our surveys continue to access content in Arabic.

Other findings of note involve media-government relations in a region where censorship and regulation have been prevalent. Tension persists between the government as a regulator of content and access on the one hand, and the ability of individuals on the other hand, to make their own content choices. As in much of the rest of the world, Arab views on regulation and censorship are mixed, and many respondents worry about government surveillance. At the same time, however, support persists for a government role in guiding people away from objectionable content.

The 2016 study that follows is people-centric, based on interviews with some 6,000 people in and across six countries, delving into significant, big-picture issues such as cultural attitudes, censorship and regulation, and perceptions of progress in one's own country, in addition to probing barometers of online and social media use, film and TV viewing, music listening, sports interest, news use, and more.

This study provides a comprehensive portrait of media use in a fast-growing region with media industries on the move. How these industries are changing is the focus of a related study released in March 2016 by NU-Q, also in partnership with Doha Film Institute. The *Media Industries in the Middle East* report draws on interviews with media leaders and executives, rather than with citizens and residents. That study measures sectors in regional as well as national markets, but it also includes in-depth data from the same six countries studied here.

Readers will note that, as always, we have a separate chapter on media use and attitudes highlighting the State of Qatar, where our university is located and where the funding for this

study is derived. While data from Qatar are found in all the other chapters of this report, we believe it is important and useful to deeply analyze our home turf, for the benefit of our students and faculty as well as for the media executives and professionals in our own community.

Qatar is also a propitious case study as a media-rich Gulf nation home to Al Jazeera, and what we call a de facto media city. Any assessment of media in Qatar, however, has connections to the rest of the region and to the global community. This work is a useful resource for the many conversations, meetings, workshops, and conferences we have in-country.

The text that follows offers, as comprehensively as possible, a unified look at media habits and relevant, related attitudes. The template here features the core questions asked in the survey accompanied by explanatory text and analysis. Commentators have called these studies the most comprehensive ever conducted in the region and on a par with similar studies elsewhere. If the yield of this work is greater understanding of dynamic and disruptive media systems in a complex region, then it will have succeeded.

*This publication was made possible by NPRP grant #7-1757-5-5261 from the Qatar National Research Fund (a member of Qatar Foundation). The statements made herein are solely the responsibility of the authors.*

For enquiries about this study, email [mideastmedia@qatar.northwestern.edu](mailto:mideastmedia@qatar.northwestern.edu).

# EXECUTIVE SUMMARY

Digital divides in the Middle East are narrowing, not only between the Gulf countries and their neighbors, but also between generations and social classes within countries. The results of the increasing ubiquity of internet use, combined with growth in other infrastructure and economic areas including satellite television and physical cinemas, are that more people are gaining access to a wider variety of media than ever before.

Results of this study suggest that increased access to content from around the world has not necessarily led to the abandonment of media from one's own nation or region. In fact, contrary to the notion of a zero-sum trade-off between traditional and global culture, we see some evidence of increased use of media specific to one's own identity alongside the expanding availability of international content.

Below are key findings from this study, which are explored in detail in the chapters that follow.

## Cultural Attitudes

- Large majorities of respondents in the six surveyed countries support both preservation of culture and integration with the modern world, while many question the possibility of doing both.
- A majority of nationals in all six countries want more entertainment media based on their culture and history, ranging from 52% of Tunisians to 80% of Qataris.
- Use of entertainment media in Arabic is widespread, but use of English is much lower and—in some countries—declining. Only about four in 10 nationals watch films or access the internet in English. Majorities of nationals consume entertainment content from Arab countries, while consumption of film, TV, and music from the U.S. decreased since 2014.
- Most nationals say their country is headed in the right direction, except for just 9% of Lebanese. Officials in Egypt did not permit the fielding of this question.

## Censorship & Regulation

- Most Egyptians and Qataris feel it is the responsibility of government to block objectionable content, whereas majorities of Lebanese, Tunisians, and Emiratis believe individuals should be able to choose to avoid such content.
- Three in 10 internet users worry about governments checking their online activity, a slight decline from 2013 and 2015. More Saudis than other nationals are worried about government surveillance.
- Though few internet users across the region report, or perhaps admit, using a VPN, those who use one express greater concern about online surveillance by governments.
- A majority of nationals supports the freedom to express ideas online even if they are unpopular (54%). Support for free speech online increased in Egypt and Tunisia from a year ago, but remained relatively stable elsewhere, except Saudi Arabia, where support declined.

## Online & Social Media

- From 2013 to 2016, internet penetration rose in all six countries surveyed, but most dramatically in Egypt, as well as Lebanon. Internet penetration in Tunisia stagnated over the past few years and is the lowest among countries surveyed. Nearly all nationals in Arab Gulf countries use the internet.
- About eight in 10 national internet users in the region use Facebook and WhatsApp, the dominant social media platforms. However, only one in five Qataris use Facebook, and significantly more use Instagram and Snapchat. Only 3% of Tunisians use WhatsApp, but all Tunisian internet users say they use Facebook. Across the region, Twitter penetration fell significantly since 2013, while Instagram penetration quintupled in the same period.

- Three in 10 nationals who use the internet worry about governments checking what they do online. However, the share of nationals region-wide expressing concern about companies checking their online activity is greater than for governments and rose steadily from 33% in 2013 to 42% in 2016. Nearly seven in 10 national internet users say they have changed how they use social media due to privacy concerns.
- Large majorities across all countries access the internet in Arabic. The share of respondents who access the internet in English fell since 2013 in Qatar, Lebanon, and Egypt. Fewer than one in five internet users in Egypt and Saudi Arabia use the internet in English, compared to nearly half of internet users in the other countries surveyed.
- Few nationals who use the internet are willing to pay for any content online (26%), and even fewer nationals paid for online content in the past year (17%).

### Film

- Television remains the most popular medium for watching films, followed by the internet. Twice as many people watched films on TV in the past six months than those who watched online (84% vs. 39%). Qatar stands out as an exception, where equal numbers watched film on television, online, and in the cinema (36% television, 38% online, 36% cinema).
- Despite the growing popularity of watching films online, only 5% of internet users paid to watch films online in the past year.
- Young people 18 to 24 years old watch far more American films than do people over 45 years old (47% vs. 18%), but this does not appear to be a cultural trade-off. Young people are just as likely to watch Arab films as the 45+ cohort, in fact slightly more likely (56% to 50%).

- More people associate positive moral influences with film and TV content from their own country than from the broader Arab world. Half of nationals say that films and TV from their own country are good for morality, while only 39% say the same about content from the Arab world in general. Tunisia is an exception; only 29% of Tunisians say that Tunisian film and TV are good for morality, while 36% say this about content from the Arab world.

### TV

- Television remains an important source of entertainment in the region, but is losing ground to the internet.
- All nationals who watch TV watch in Arabic (99%). Only one-tenth of nationals watch TV in English (11%), down from 18% in 2014.
- One-third of nationals are “binge-watching” TV content, defined as watching multiple episodes of a program in close succession. This trend is seen in all countries, with Emiratis by far the most likely to report binge-watching.
- Comedy continues to be the favorite TV genre, followed by drama and news. A notable exception is Qatar, where news, documentaries, and drama are the three favorite genres. Religious programming gained popularity since 2014 in Egypt, Saudi Arabia, and the UAE, but its popularity declined in Qatar.

### Music

- Televised music videos are highly popular in Arab countries. TV is the most common platform for listening to music across the region; three in four nationals access music on TV.
- Nearly all nationals listen to Arabic music. Western music is not highly popular. Less than one in five nationals listen to music from either Europe or the U.S.
- Most internet users stream music online. Three-quarters of internet users listen to music online in 2016 (78%) and 31% listen to online music daily.
- Most nationals listen to music for entertainment (85%). Far fewer Qataris—barely half—listen to music.

### Gaming

- Nearly four in 10 nationals in the region play video games (36%).
- Thirteen percent of nationals in the region say they play video games every day.
- Six in 10 nationals who own a smartphone play games on their phone (59%).
- Emiratis report spending more time than other nationals playing video games each week, with a median of 14 hours compared to only seven hours for other nationals.
- Sixty-two percent of males who own a smartphone play games on their phone, but nearly as many women play as well (56%).

### Sports

- Sports is reported as a top-three favorite TV genre by 22% of respondents, behind only comedy, drama, and news.
- While nationals enjoy watching sports, they are not inclined to pay to access sports online.
- Nationals who self-identify as more culturally progressive than culturally conservative tend to be sports fans. Far more progressives than conservatives enjoy attending sporting events or watching sports on TV/digitally (attend: 62% vs. 43%, watch on TV/digitally: 64% vs. 44%).

### News

- More respondents in all countries access news on TV than online, except in Qatar.
- More Emiratis and Saudis read newspapers than other nationals surveyed.
- In Egypt, the popularity of news as a favorite TV and online video genre dropped significantly.

### Children's Media

- According to adult respondents, 45% of children 0 to 6 years old in their households play games on a phone at least once a week; one in six spend time online every day.
- Saudi Arabia is the only country where children make more independent entertainment choices than have their entertainment chosen or approved for them by an adult.
- Respondents estimate that more of the entertainment media consumed by girls in their households is chosen by adults than is the entertainment consumed by boys.
- Three-fourths of respondents want government to do more to protect children in their household from certain content, down slightly from 2014 (80% in 2014 vs. 73% in 2016).



### A Focus on Qatar

- Qataris consume less entertainment media than nationals in all other countries; they are the least likely to watch TV programs, films on TV, or any online video, and to listen to music in general or online, and to play games on a phone.
- Qataris are the least likely nationals to share—specifically send or post—online content. Only 36% shared online in the last month, whereas seven in 10 or more nationals in other countries shared online recently.
- Just one in five Qataris use Facebook, while majorities use Snapchat and Instagram.
- Qataris are less likely than other nationals to say privacy concerns led them to change how they use social media (46% of Qataris vs. 70% of other nationals).
- More Qataris list news as one of their favorite TV genres than any other type of programming, including comedy, which is the most popular TV genre in the region.
- Qatar is also the only country where nationals are more likely to watch TV content on-demand or otherwise at a time different than when it is broadcast.
- More Qataris watch TV and films from the U.S. than nationals in other countries, and more Qataris watch TV in English than other nationals.
- Qataris estimate that 49% of the videos they view online are for news and information and 46% are for pure entertainment, making them the only nationals surveyed who consume more news than entertainment online.



# CULTURAL ATTITUDES

More people associate positive moral influence with content from their own country than content from the Arab world in general.



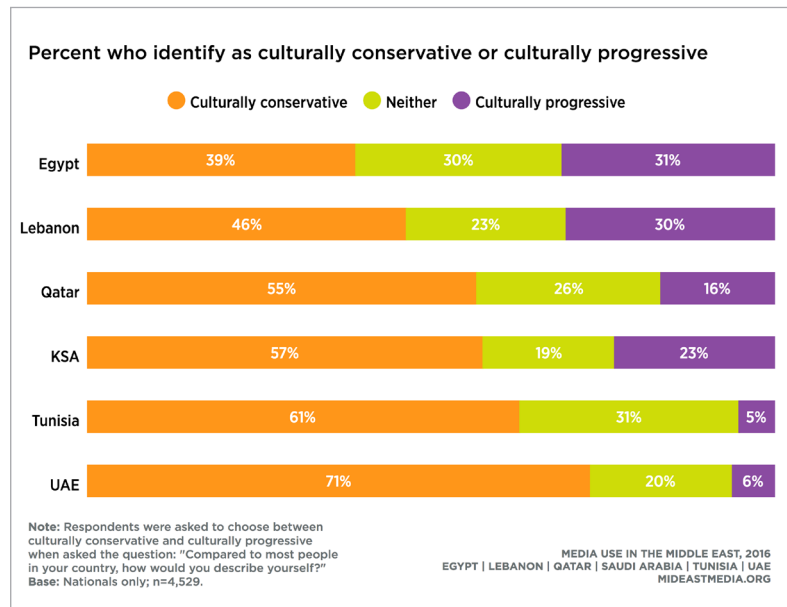
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## In this chapter

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- Cultural Preservation and Modernity
- Content Preferences
- Desirability of Arab Entertainment

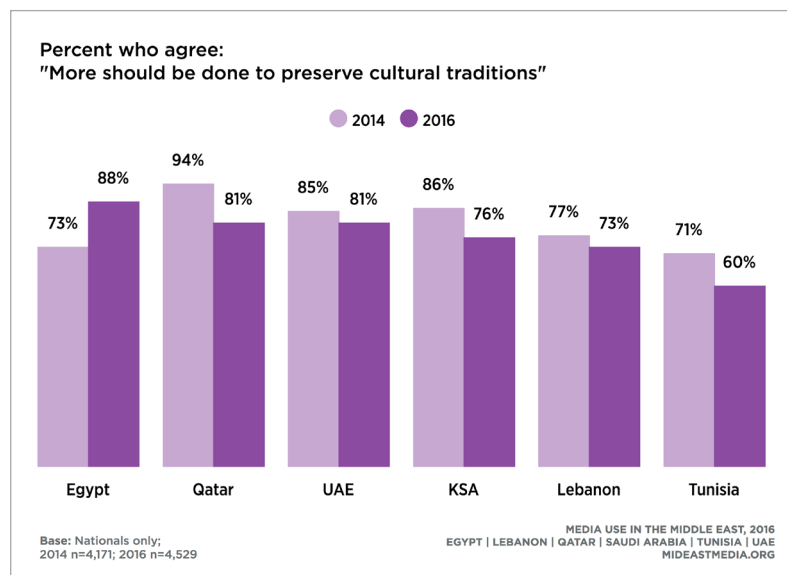
## Cultural Preservation and Modernity



Large majorities of respondents in the six surveyed countries support both preservation of culture and integration with the modern world, but many question the possibility of doing both.

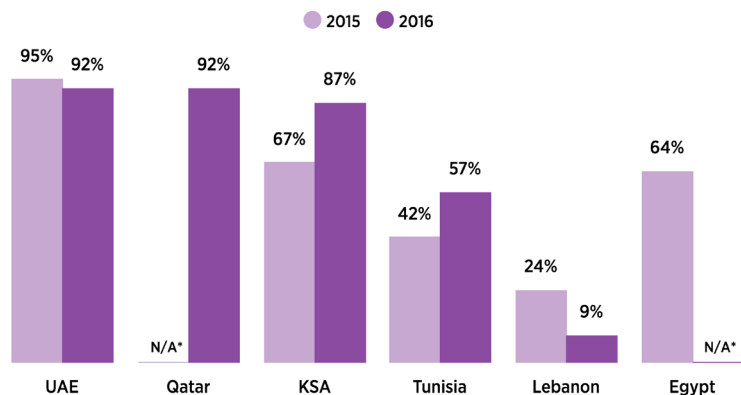
Nationals are more likely than expatriates to describe themselves as "culturally conservative" than "culturally progressive", relative to most people in their country. More Emiratis identify as culturally conservative in 2016 than in 2015. However, in 2016, fewer Egyptians and Qataris describe themselves as conservative compared to 2015.

Three-quarters of nationals say more should be done to conserve cultural traditions. While desire to preserve culture has dropped in some countries, more Egyptians want more cultural preservation compared to 2014.



Two-thirds of nationals also say their culture should do more to integrate with modern society (65%), with Qataris more likely than other nationals to agree. Nationals under 45 years old are more likely than those 45 years and older to support integration of culture with modernity. Support increases with education (54% primary or lower education vs. 69% university or higher education). Integration of culture with modern society is supported more among those who identify as culturally progressive than among the culturally conservative (74% vs. 63%).

Percent who say their country is on the right track



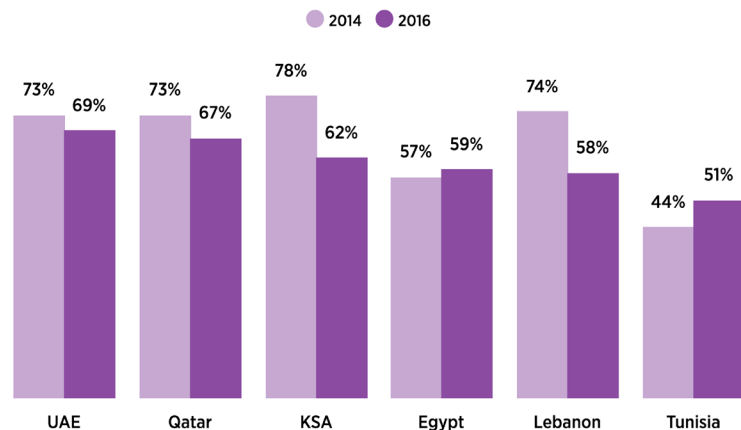
\*Question not permitted in Egypt in 2016 and Qatar in 2015.  
Base: Nationals only; 2015 n=3,858; 2016 n=3,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
EGYPT | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
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A sizeable minority of nationals say it is not possible to simultaneously preserve cultural traditions and integrate with modern society (43%). Nearly six in 10 Egyptians hold this belief, more nationals than from any other country (58% Egyptians vs. 52% Saudis, 46% Emiratis, 37% Lebanese, 31% Qataris, 31% Tunisians). The belief that preserving culture and modernity are incompatible holds steady across age and education levels.

Most nationals say their country is headed in the right direction, except for just 9% of Lebanese nationals. Officials in Egypt did not permit the fielding of this question.

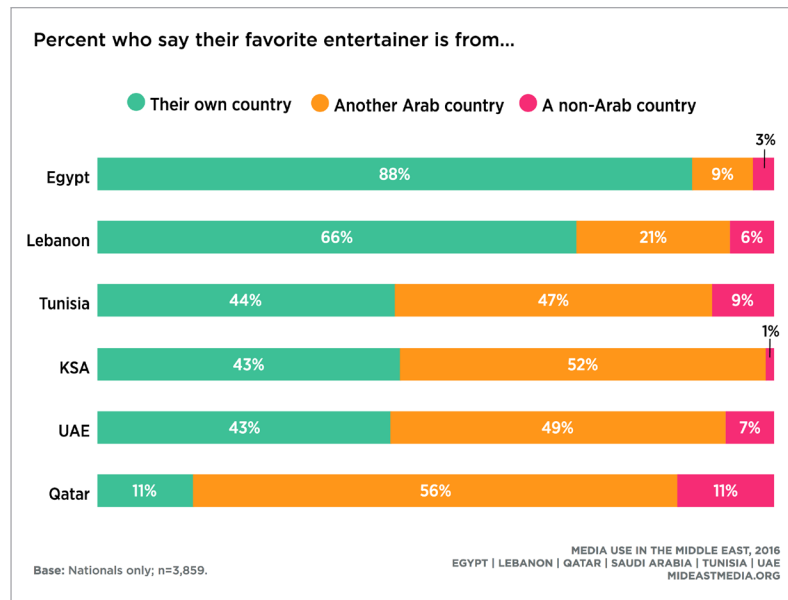
Percent who agree: "People benefit from watching content from different parts of the world"



Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

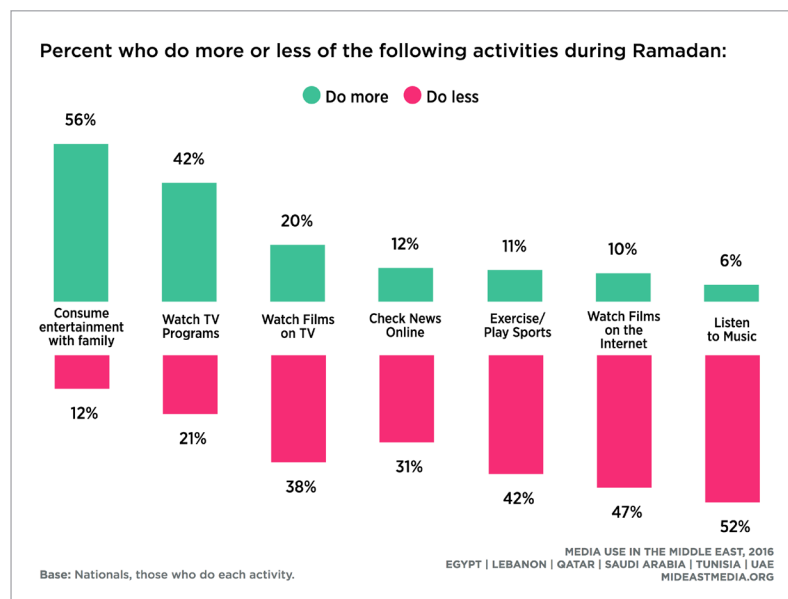
MEDIA USE IN THE MIDDLE EAST, 2016  
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## Content Preferences



Majorities of nationals consume entertainment content from Arab countries. Notably, the consumption of film, TV, and music from the U.S. has decreased since 2014. While use of entertainment media from the Arab world varies little with age, consumption of U.S. content decreases with age.

Consumption of entertainment media in Arabic is widespread, but use of English is much lower and—in some countries—declining. Only about four in 10 nationals (who use each respective medium) watch films or access the internet in English (42% films, 37% internet), and even fewer access music, print materials, and TV programs in English (30% music, 13% print materials, 11% TV programs). Nationals in most countries report a reduced tendency to watch films in English compared with two years ago, with the notable exception of Egypt, where viewing English films rose substantially. Use of the internet in English declined overall since 2013, but a few countries—Lebanon, Qatar, and Tunisia—report small increases in English internet use since 2015.

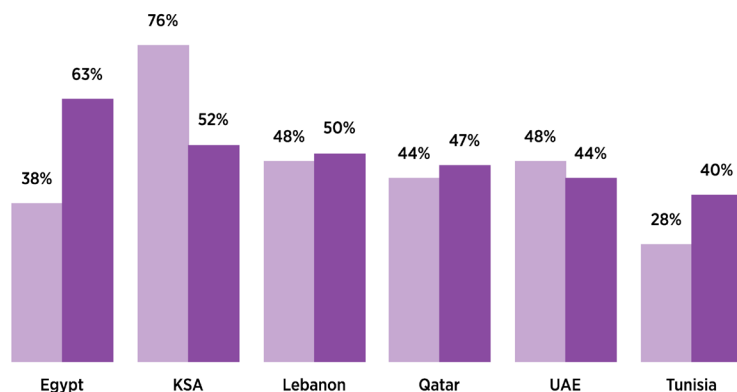


While most nationals, about six in 10, believe consuming entertainment from different parts of the world is beneficial, support for this statement fell in all countries since 2014, except in Tunisia and Egypt. Those who self-identify as cultural progressives are more likely than cultural conservatives to see a benefit in watching content from other parts of the world (66% vs. 55%). This belief is more common among the more highly-educated nationals, with proportions ranging from 45% among those with a primary or lower education to 62% among university or more highly-educated respondents.

## Desirability of Arab Entertainment

Percent who agree:  
"Entertainment media challenge rather than reinforce cultural stereotypes"

● 2014 ● 2016



Base: Nationals only;  
2014 n = 4,171; 2016 n = 4,529.

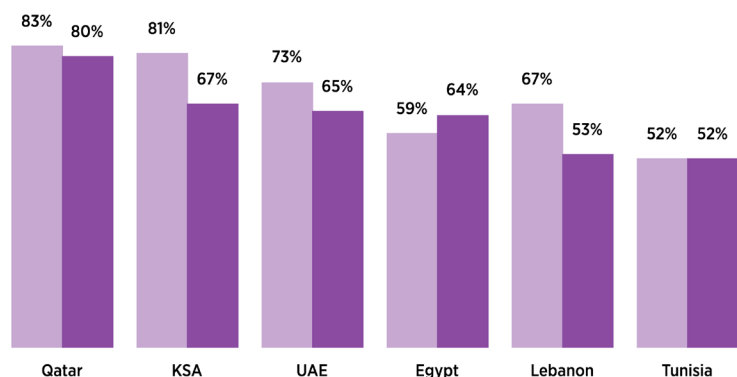
MEDIA USE IN THE MIDDLE EAST, 2016  
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Half of nationals in the six countries say the quality of entertainment produced in the Arab world has improved since 2014. Emiratis are most likely to say quality is up (67%), while Tunisians are least laudatory of Arab entertainment (38%).

Half of nationals also believe entertainment media challenge rather than reinforce cultural stereotypes. In Egypt and Tunisia, the proportion of respondents saying that entertainment media challenge cultural stereotypes rose since 2014. At the same time, however, fewer Saudis agreed with this statement. Cultural progressives are more likely than conservatives to say entertainment media counter stereotypes (59% vs. 48%).

Percent who agree:  
"More entertainment media should be based on my culture and history"

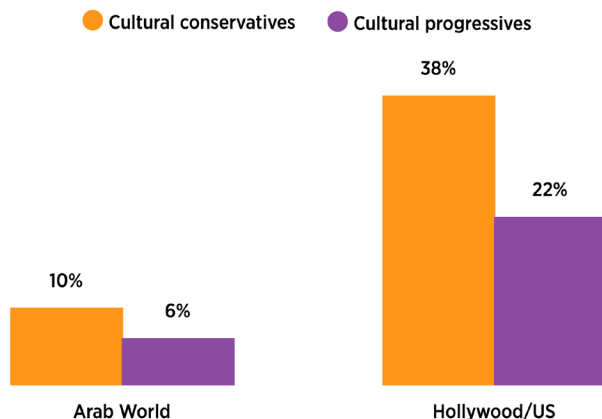
● 2014 ● 2016



Base: Nationals only;  
2014 n = 4,171; 2016 n = 4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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### Percent of cultural conservatives and progressives who say films from the Arab world or the U.S. are harmful for morality



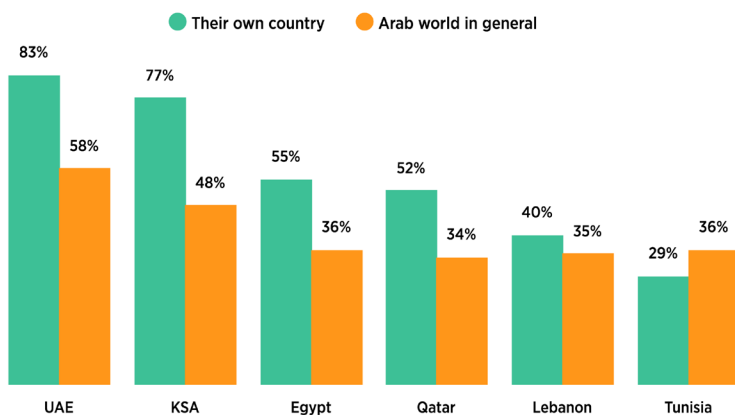
Note: Respondents were asked to choose between culturally conservative and culturally progressive when asked the question: "Compared to most people in your country, how would you describe yourself?"  
Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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A majority of nationals in all six countries want more entertainment media based on their culture and history, ranging from 52% of Tunisians to 80% of Qataris. More Egyptians and Emiratis express a desire for such culturally relevant entertainment compared to 2014, while fewer Lebanese and Saudis desire more cultural and historical content than they did two years ago. Cultural progressives and conservatives are about equally likely to believe more entertainment media should be based on their culture and history (63% progressives vs. 60% conservatives).

The majority of nationals prefer films portraying their own culture, but agreement has declined over the past two years in all countries, except Tunisia.

### Percent who say films and TV from the following places are good for morality:



Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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# CENSORSHIP, REGULATION, AND ONLINE SURVEILLANCE

More nationals worry about companies,  
compared to governments, checking  
what they do online.



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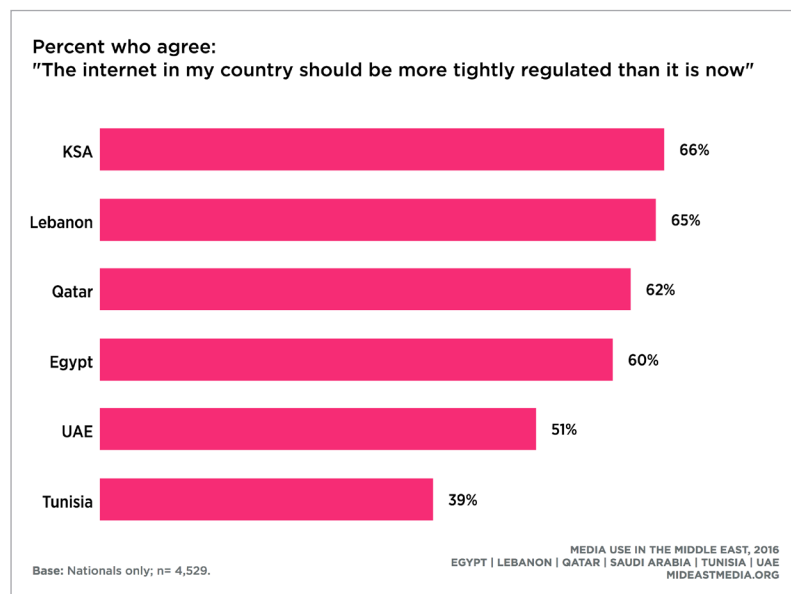
## In this chapter

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- Regulation and Free Speech
- Attitudes Toward Censorship
- Surveillance of Online Activity

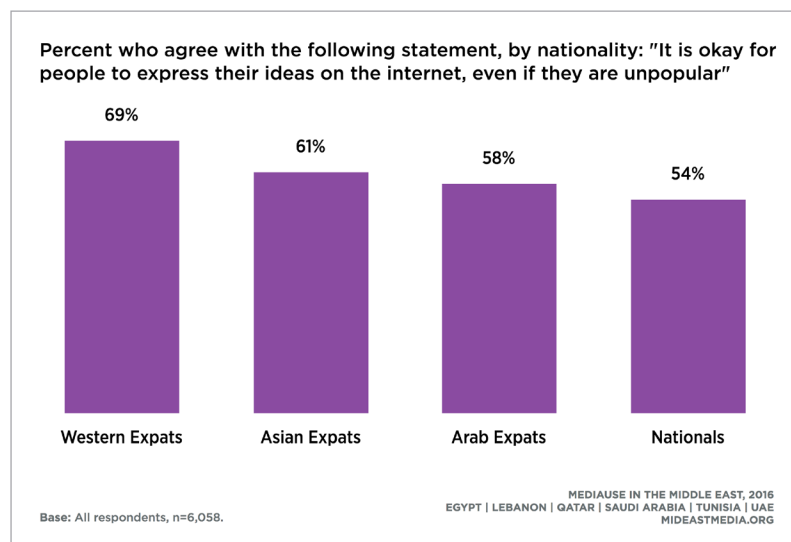


## Regulation and Free Speech

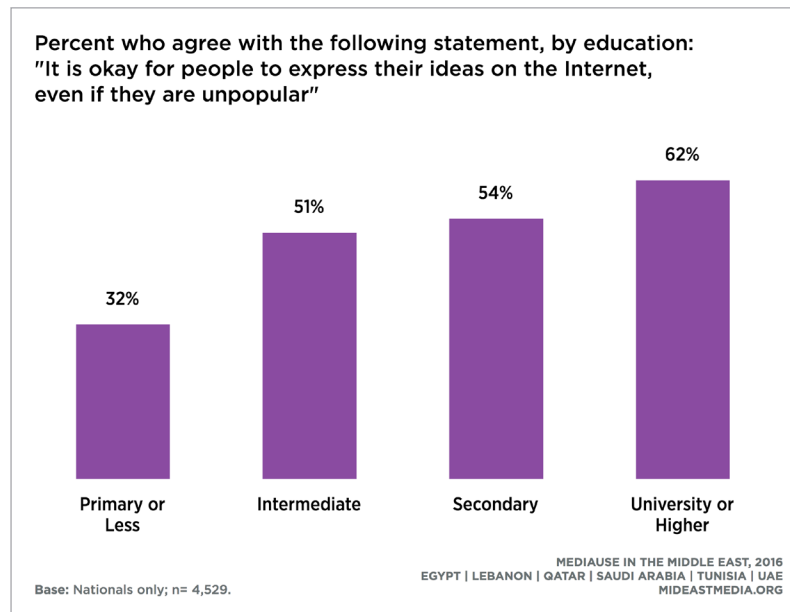


Most Arab nationals support greater internet regulation (57%), though regulation need not necessarily mean government censorship to respondents. More nationals worry about companies, compared to governments, checking what they do online, so "regulation" to some respondents could mean greater protection against corporate overreach online.

A majority of nationals also supports the freedom to express ideas online even if they are unpopular (54%). Support for free speech online increased by six percentage points in Tunisia and 14 percentage points in Egypt since 2015 (Tunisia: 43% in 2016 vs. 37% in 2015, Egypt: 59% in 2016 vs. 45% in 2015), but remained relatively stable elsewhere, except Saudi Arabia where support declined 11 percentage points (53% in 2016 vs. 64% in 2015).



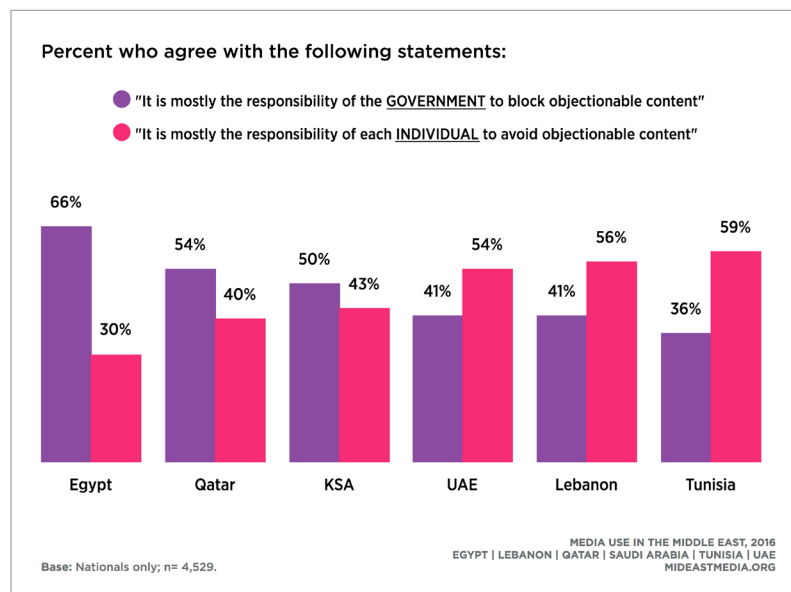
Across the region, more self-identified cultural progressives than conservatives support both greater internet regulation and freedom of speech online (internet regulation: 69% progressives vs. 53% conservatives, freedom of speech: 68% progressives vs. 47% conservatives). Qatar is the only country where more conservatives support both internet regulation and online freedom of speech (internet regulation: 72% conservatives vs. 54% progressives, freedom of speech: 62% conservatives vs. 54% progressives).



Support for both internet regulation and online freedom of expression increases with education. For example, only one-third of those with a primary education or less support freedom of speech online, compared to six in 10 of the university or more highly educated (32% vs. 62%). And only one-third of those with a primary education support more online regulation, while two-thirds of university or more highly-educated respondents say the same (33% vs. 65%).

Men are slightly more likely to support online freedom of speech than women (57% vs. 51%); only in the UAE do more women than men support the right to express unpopular speech online (61% vs. 57%). Most young adults support online freedom of speech (62% of 18 to 24 year-olds), while support falls to 45% among those 45 and older. Western expatriates are far more likely than others to support freedom of expression online.

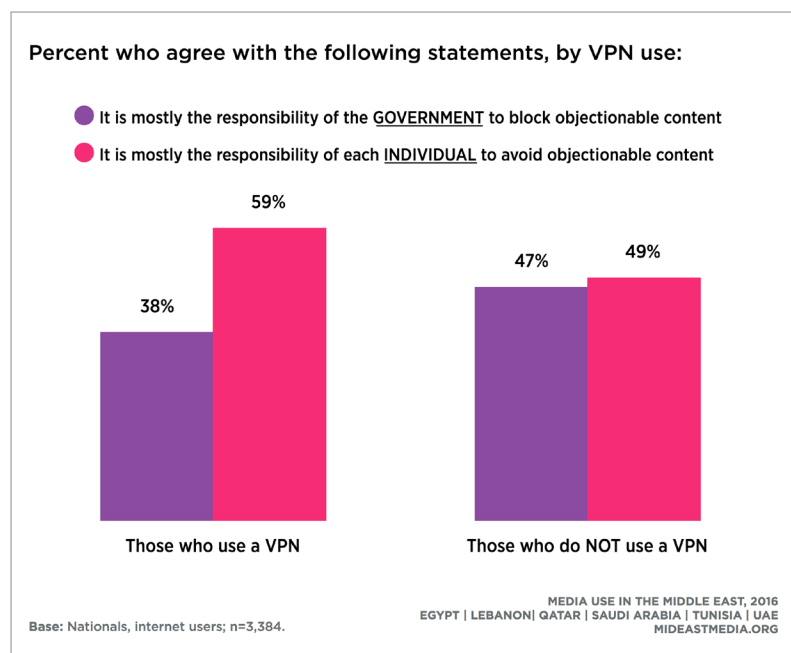
## Attitudes Toward Censorship



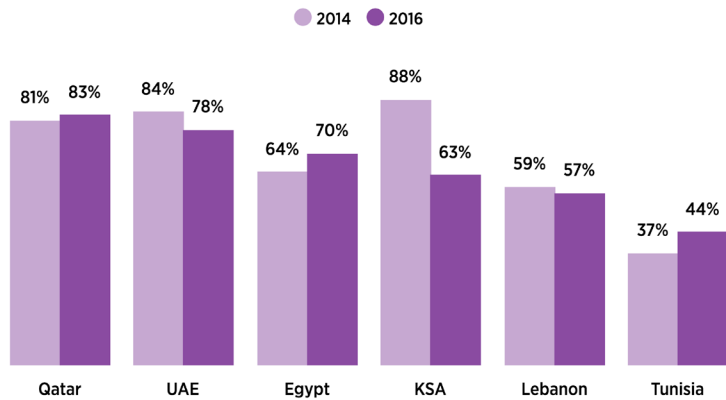
Most Egyptians and Qataris feel it is the responsibility of governments to block objectionable content, whereas majorities of Lebanese, Tunisians, and Emiratis believe individuals should be able to choose to avoid such content.

More women than men say governments should block objectionable content (51% women vs. 45% men); more men than women, however, say the choice should rest with individuals (50% men vs. 44% women). The youngest respondents (18-24) prefer individual choice over government censorship (54% individual vs. 42% government), while those 45 and older prefer governments block objectionable content (54% government vs. 40% individual).

Support for individual autonomy in eschewing objectionable content increases with education, ranging from 39% among those with a primary education or less to 51% of university graduates. Support for governments to block undesirable content is stronger among those with a primary education or less than among the university or more highly-educated (53% vs. 45%).



**Percent who agree:**  
**"Government oversight helps production of quality entertainment"**



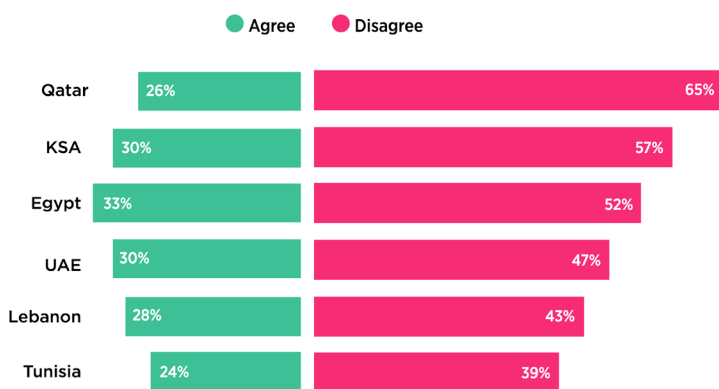
Base: Nationals only;  
 2014 n = 4,171; 2016 n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Virtual Private Networks (VPNs) or proxy services can be used to enhance online privacy and may also afford access to content from other parts of the world. While only 7% of internet users use VPNs or proxy services, those who do are more likely to say individuals should be able to avoid objectionable entertainment content (59%) compared to 49% of those who do not use VPNs.

Majorities in all countries, except Tunisia, feel government oversight produces quality entertainment. Qataris report the most agreement (83%), while fewer than half of Tunisians agree (44%); however, more of both Egyptians and Tunisians in 2016 than in 2014 say government oversight improves entertainment. Saudis, and to some extent Emiratis, are less likely to agree with the statement in 2016 than in 2014.

**Percent who agree/disagree: "Films and TV programs should be shown in their entirety even if some people find some scenes inappropriate"**



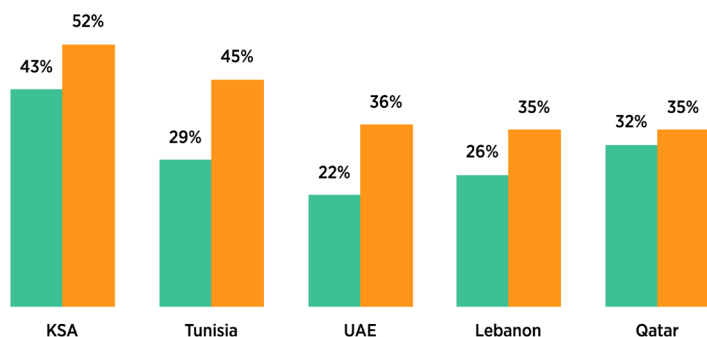
Note: Does not include neutral and don't know/refuse responses.  
 Base: Nationals only; n= 4,529.

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## Surveillance of Online Activity

Percent who agree with the following:

- "I am worried about GOVERNMENTS checking what I do online"
- "I am worried about COMPANIES checking what I do online"



Note: Question not permitted in Egypt.  
Base: Nationals, internet users; n=2,801.

MEDIA USE IN THE MIDDLE EAST, 2016  
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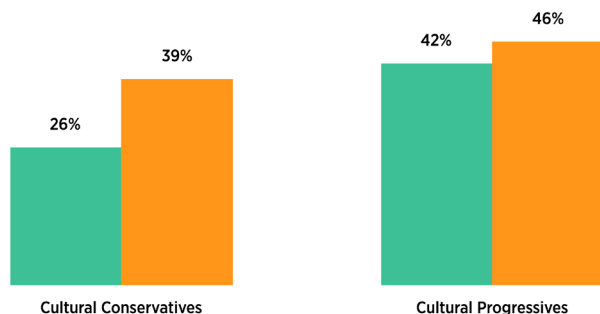
One in three internet users worries about governments checking what they do online, a slight decline from 2013 and 2015. More Saudis than other nationals are worried about government surveillance (43%), while only one in five Emiratis say the same (22%).

However, the share of those expressing concerns about companies checking what they do online rose from about one-third in 2013 and 2015 to 42% in 2016. Approximately one-third of national internet users in Lebanon, Qatar, and the UAE worry about online corporate surveillance, compared to nearly half in Saudi Arabia and Tunisia.

More cultural progressives than conservatives report concern about online surveillance by both governments and companies.

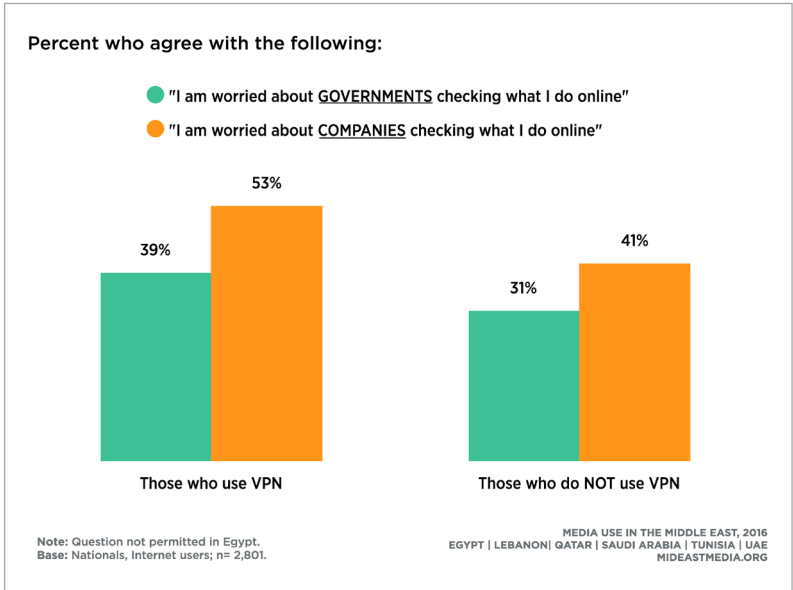
Percent of cultural conservatives and progressives who agree with the following:

- "I am worried about GOVERNMENTS checking what I do online"
- "I am worried about COMPANIES checking what I do online"



Note: Question not permitted in Egypt. Respondents were asked to choose between culturally conservative and culturally progressive when asked the question: "Compared to most people in your country, how would you describe yourself?"  
Base: Nationals, internet users; n=2,801.

MEDIA USE IN THE MIDDLE EAST, 2016  
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VPN users also express greater concern about online surveillance and perhaps use VPNs for an added level of privacy from surveillance.

Expatriates from outside the region express greater concern than Arabs about government surveillance of online activity, but the share of respondents expressing concern has fallen slightly among all national classifications, from 50% to 45% among Asian expatriates, 47% to 41% among Western expatriates, 36% to 32% among Arab expatriates, and from 37% to 31% among Arab nationals.





# ONLINE AND SOCIAL MEDIA

Nearly seven in 10 national internet users say they changed how they use social media due to privacy concerns.



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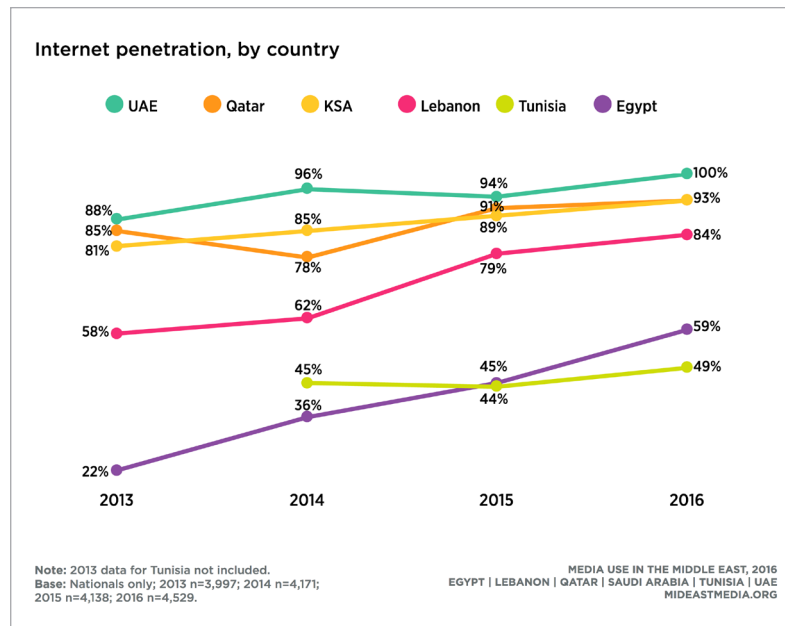
## In this chapter

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- Internet Penetration
- Social Media Platforms
- Social Media Behavior
- Online Privacy
- Time Online
- Online Video



## Internet Penetration



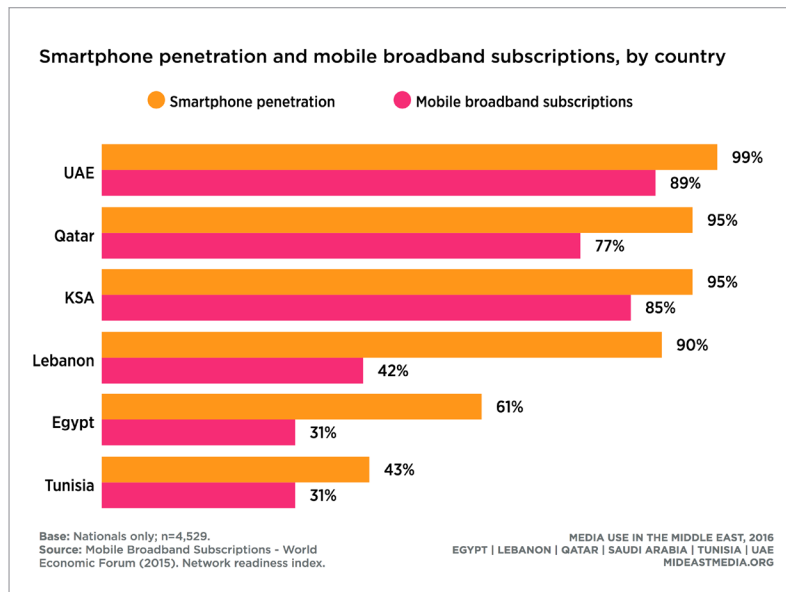
From 2013 to 2016, internet penetration rose in all six countries surveyed, but most dramatically in Egypt and Lebanon (Egypt: 22% to 59%, Lebanon: 58% to 84%). Internet penetration in Tunisia has stagnated over the past few years and is the lowest among the countries surveyed (49%).

Internet penetration increased among all age groups between 2014 and 2016. Not surprisingly, younger nationals are more likely to use the internet; 93% of 18 to 24 year-olds are online, compared to 85% of adults 25 to 34 years old, 72% of 35 to 44 year-olds, and 39% of respondents 45 years and older. Internet penetration increases sharply with education (14% primary school or less, 56% intermediate, 79% secondary, 94% university or higher).

Men are more likely than women to use the internet in Egypt and Tunisia (Egypt: 63% vs. 54%, Tunisia: 54% vs. 43%). The trend reverses in Lebanon, where more women than men are online (88% vs. 81%). Internet penetration is similar among men and women in the three Arab Gulf states in the study.

Arab, Asian, and Western expatriates are all more likely than Arab nationals to use the internet (97% Arab expatriates, 98% Asian expatriates, 97% Western expatriates vs. 73% Arab nationals).

Smartphone ownership tracks closely with internet penetration in the six countries surveyed. Nearly all nationals in the Gulf states and Lebanon use a smartphone—nine in 10 or more—compared to 43% of Tunisians and 61% of Egyptians. Smartphone ownership is highest among young respondents; 89% of nationals 18 to 24 years-old own smartphones compared to 85% of 25 to 34 year-olds, 71% of 35 to 44 year-olds, and only 49% of those 45 years or older.



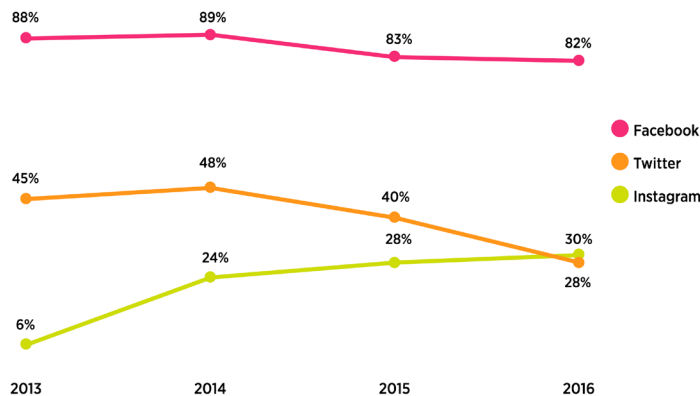
Mobile broadband penetration is not nearly as high in Lebanon, Egypt, and Tunisia as in the Arab Gulf countries. Large majorities of the populations in Gulf countries have mobile broadband access, but just 42% of Lebanese, 31% of Egyptians, and 31% of Tunisians have mobile broadband subscriptions, according to data from the World Economic Forum and displayed in the chart to the left.

Smartphone penetration increases with both education and frequency of international travel. Only 19% of those with a primary education, compared to over 90% of university-educated respondents, have a smartphone. About nine in 10 nationals who have traveled outside the Middle East in the past three years own smartphones, compared to about seven in 10 who have not traveled (87% of those traveled outside Middle East have a smartphone vs. 69% of those who did not travel outside Middle East).

Men and women own smartphones equally, except in Tunisia, where 49% of men and 37% of women own smartphones. Nearly all expatriates own a smartphone, compared to three-quarters of Arab nationals (98% Asian, 97% Arab, 97% Western expatriates vs. 74% Arab nationals).

## Social Media Platforms

Percent who use the following social media platforms:



Base: Nationals, internet users; 2013 n= 2,856; 2014 n=2,427; 2015 n=2,764; 2016 n=3,355.

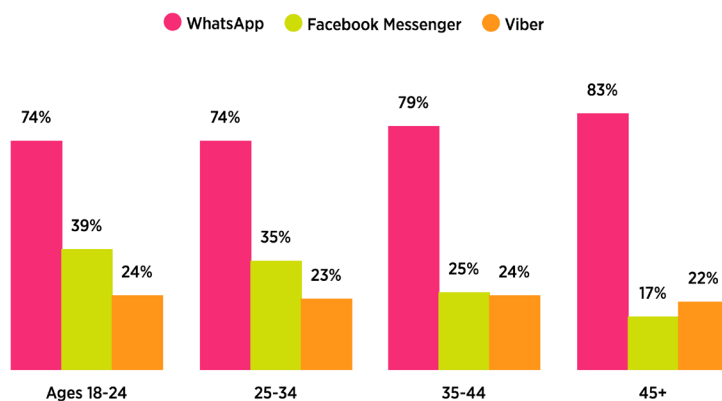
MEDIA USE IN THE MIDDLE EAST, 2016  
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About eight in 10 national internet users in the region use Facebook and WhatsApp, the dominant social media platforms (82% and 77%). However, only one in five Qataris use Facebook, but more rely on Instagram and Snapchat (22% Facebook vs. 60% Instagram and 55% Snapchat). Only 3% of Tunisians use WhatsApp, but all Tunisians use Facebook (100%).

Facebook's penetration in the region has declined since 2013 (88% in 2013, 89% in 2014, 83% in 2015, 82% in 2016). Twitter use in the region fell sharply in the past year (40% 2015 vs. 28% 2016). Neither LinkedIn nor Pinterest have a foothold in the Arab countries surveyed (2% and 1%).

Though more young nationals use social media in general, WhatsApp is more popular among the oldest group (45+) than the youngest group (18-24) (83% vs. 74%).

Percent who use the following social media platforms, by age:

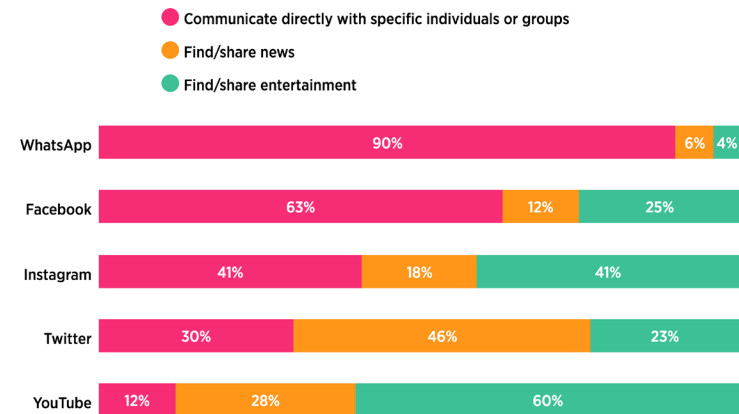


Base: Nationals, internet users; n=3,355.

MEDIA USE IN THE MIDDLE EAST, 2016  
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A significant majority of each platform's users use it daily, except LinkedIn, for which fewer than one-third of its users access it daily. More than nine in 10 Facebook and WhatsApp users are daily users (94% and 93%). However, while only 17% of nationals use Snapchat, 83% of them use it daily.

### Users of each social media platform who say they use it most often to...



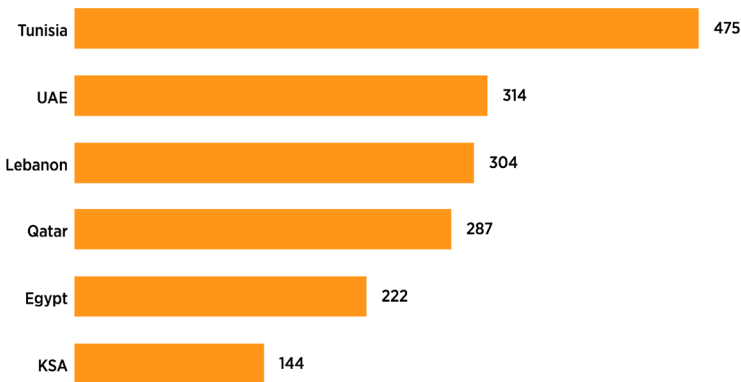
Base: Nationals, users of given platform.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Communication with others is the primary purpose for nationals to use both Facebook and WhatsApp (63% and 90%). The primary purpose of YouTube, however, is finding and sharing entertainment (60%), while Twitter users primarily use that platform to find and share news (46%). In both cases, more to find than to share content. An equal proportion of Instagram users name both communication and entertainment as the primary use of the platform (41% each).

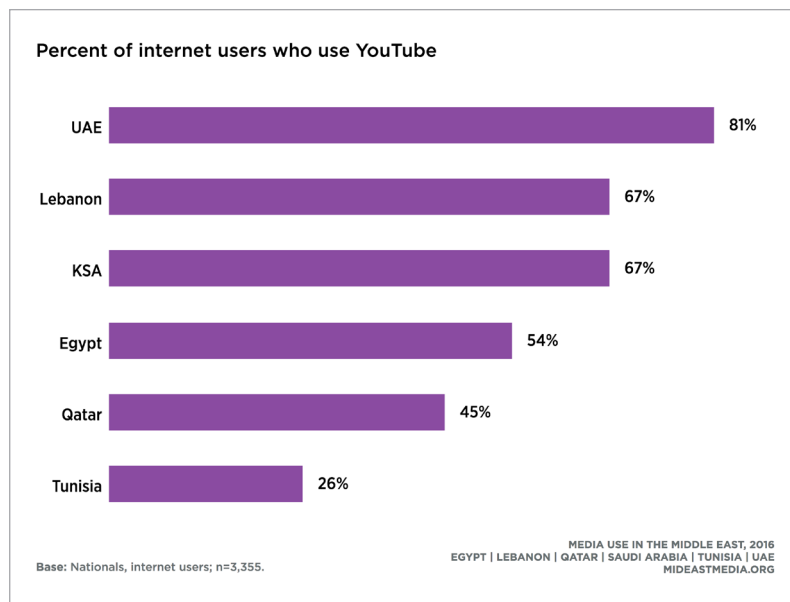
Facebook users in the region report a median of 160 friends. About one-third report fewer than 100 friends and 16% have 500 or more Facebook friends. The median number of Facebook friends ranges from the highest in Tunisia to the lowest in Saudi Arabia (332 vs. 60). Men report a higher median number Facebook friends than women (200 vs. 140).

### Average number of friends people say they have on Facebook



Base: Nationals, Facebook users; n=2,601.

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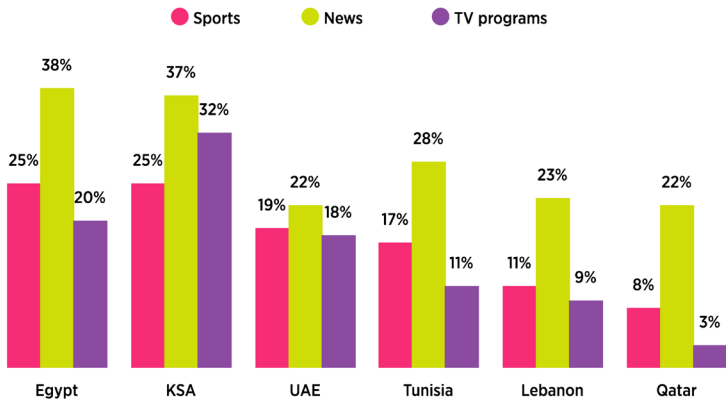


The median number of Facebook friends decreases with age, from 230 among 18 to 24 year-olds to only 80 among those 45 years and older. Cultural progressives report a higher median number of friends than cultural conservatives (200 vs. 150).

Half of nationals say social media influence their entertainment choices, and more Emiratis agree with that statement than any other nationals. The share of respondents who say their choices are influenced by social media ranges from 64% of 18 to 24 year-olds to 28% of those 45 years and older. Forty-five percent of nationals say direct messaging or email helps them make entertainment choices, with proportions ranging from 53% of 18 to 24 year-olds to 31% of those 45 years and older.

## Social Media Behavior

Percent of internet users who sent or shared content or comments online related to the following topics in the past month:



Base: Nationals, internet users; n=3,384.

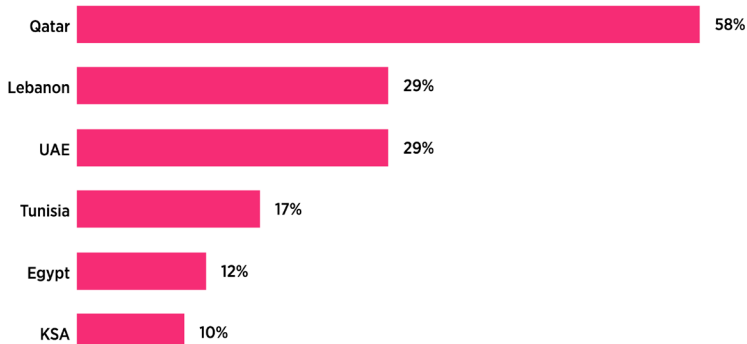
MEDIA USE IN THE MIDDLE EAST, 2016  
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Three in four internet users have shared—sent or posted—content or comments online in the past month; videos, news, and music are the most shared topics (43% videos, 30% news, 25% music). This pattern holds across all countries except Qatar, where 58% of nationals do not share online, a proportion twice that in Lebanon and the UAE.

More men than women share about news and sports (news: 33% vs. 26%, sports: 30% vs. 5%). More women than men share content about music (28% vs. 22%). Online sharing increases with education.

More of the youngest (18-24) than the oldest (45+) internet users share content online (78% vs. 63%). The 18 to 24 year-olds are twice as likely as those 45 years and older to share content about sports online, and more than three times as likely to share music-related content. Sharing or commenting on videos is more common among the youngest (18-24) than the oldest (45+) age group (49% vs. 30%).

Percent who have not sent or shared content or comments online in the past month

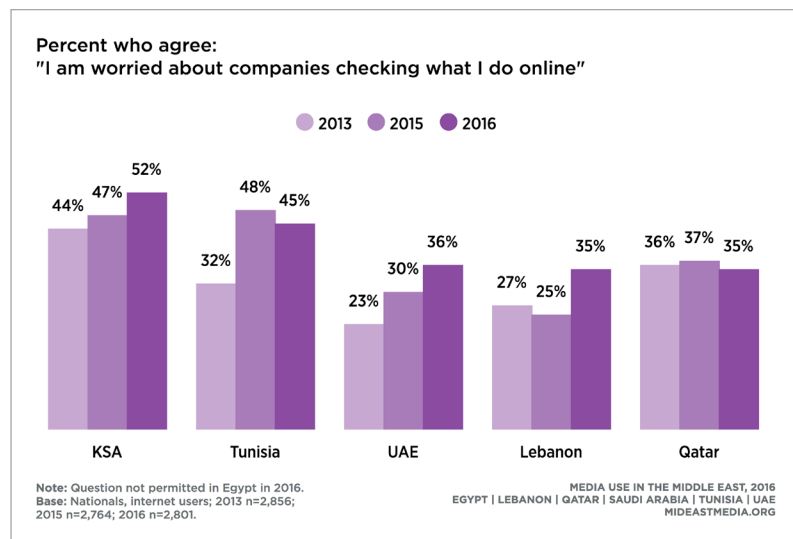


Base: Nationals, internet users; n=3,384.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Sharing content online becomes more common the more social media platforms nationals use. Overall, among nationals using only one social media platform, 65% shared or commented online about any content in the past month. This proportion increases slightly to 67% among those using two to three platforms and jumps to 83% among those using four or more social media platforms. This pattern holds across content types; for example, only 25% of nationals using one social media platform share videos online compared to 53% of those using four or more platforms. The same percentages rise from 20% to 32% for music and from 24% to 33% for news.

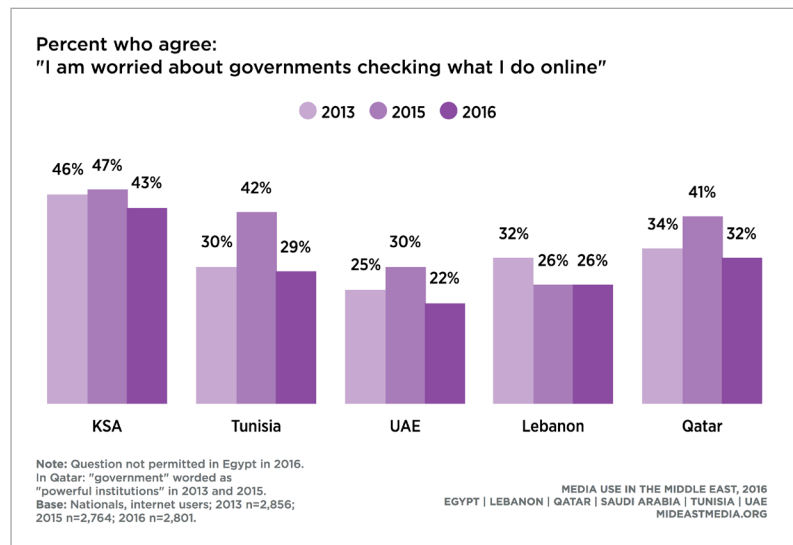
## Online Privacy



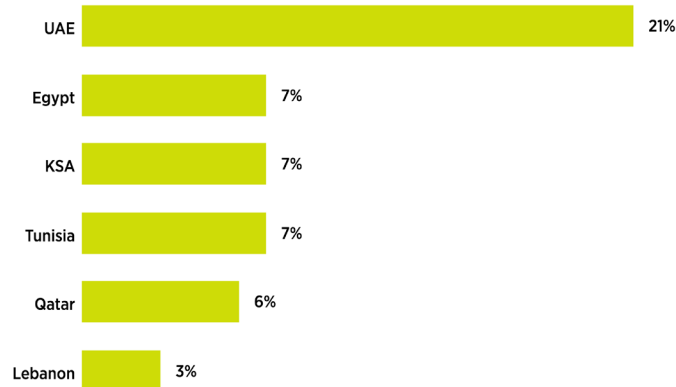
Three in 10 national internet users worry about governments checking what they do online, a slight decrease from previous years (37% in 2015 and 35% in 2013). Saudis are more likely to express concern than other nationals (43%), while one in five Emiratis say the same (22%). However, the share of nationals region-wide who express concern about companies monitoring online activity is higher than for governments, and rose steadily from 33% in 2013, to 37% in 2015, and to 42% in 2016. Corporate surveillance concerns more Saudis and Tunisians than any other nationals (52% and 45%), while one in three Emiratis, Lebanese, and Qataris worry about surveillance by companies (36% Emiratis, 35% Lebanese, 35% Qataris).

More cultural progressives than conservatives express concern about online surveillance by both governments and companies (governments: 42% progressives vs. 26% conservatives, companies: 46% progressives vs. 39% conservatives). In 2015, however, the overall level of concern with company surveillance was not only lower than in 2016, but more conservatives, not progressives, were concerned (38% vs. 32%). In 2015, about one-third of each group expressed concern with government surveillance.

Between 2015 and 2016, concern for governments monitoring online activity decreased from four to six percentage points among Arab nationals and expatriates, Asian expatriates, and Western expatriates. Still, more Asian and Western expatriates than Arabs worry about government surveillance (45% Asian expatriates and 41% Western expatriates vs. 32% Arab expatriates and 31% Arab nationals).



#### Percent of internet users who say they use a VPN or proxy service



Base: Nationals, internet users; n=3,384.

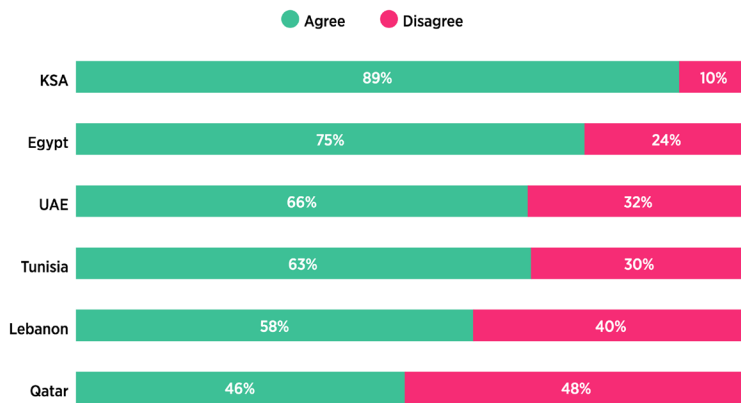
MEDIA USE IN THE MIDDLE EAST, 2016  
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Those using a VPN or other proxy service are more likely to worry about both types of surveillance. More VPN-using nationals worry about governments and companies checking what they do online (governments: 39% VPN vs. 31% no VPN, companies: 53% VPN vs. 41% no VPN).

Overall, only 7% of internet users use VPNs, though the figure is one in five among Emiratis (21%). Even among the youngest and most educated nationals, just one in 10 nationals use a VPN or other proxy service. Expatriates are slightly more likely to use VPNs than nationals (16% Asian expatriates, 12% Western expatriates, 10% Arab expatriates vs. 7% nationals).

Nearly seven in 10 national internet users say they changed how they use social media due to privacy concerns, with proportions ranging from 89% of Saudis and 75% of Egyptians to 46% of Qataris.

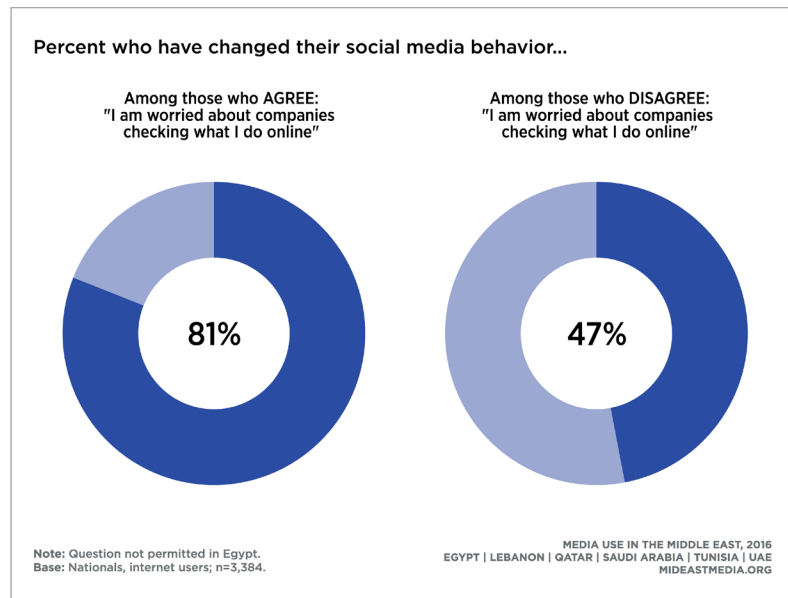
#### Percent who agree/disagree: "Concerns about privacy have changed the way I use social media"



Note: Does not include don't know/refuse responses.  
Base: Nationals, internet users; n=3,384.

MEDIA USE IN THE MIDDLE EAST, 2016  
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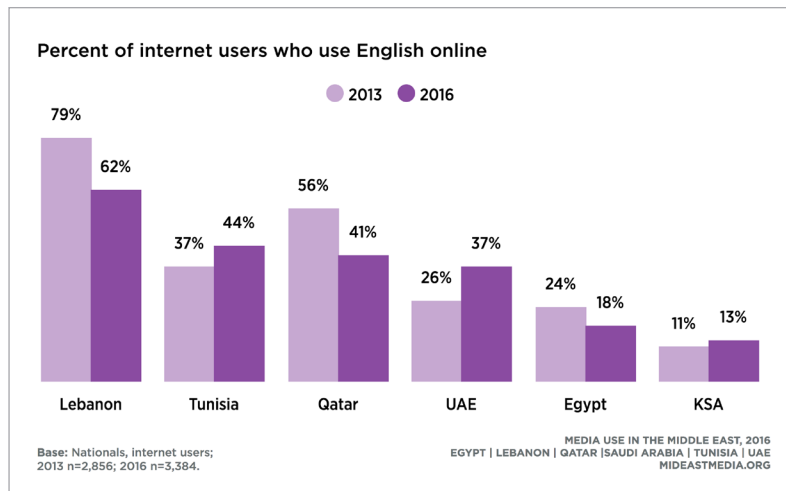




Over eight in 10 of those concerned with government or corporate surveillance of their online activity say they have changed their social media habits due to privacy misgivings, compared to about half of those without such concerns.

More Asian and Western expatriates than Arabs have changed social media habits due to privacy worries (76% of Western expatriates and 83% of Asian expatriates vs. 62% Arab expatriates and 68% Arab nationals).

## Time Online

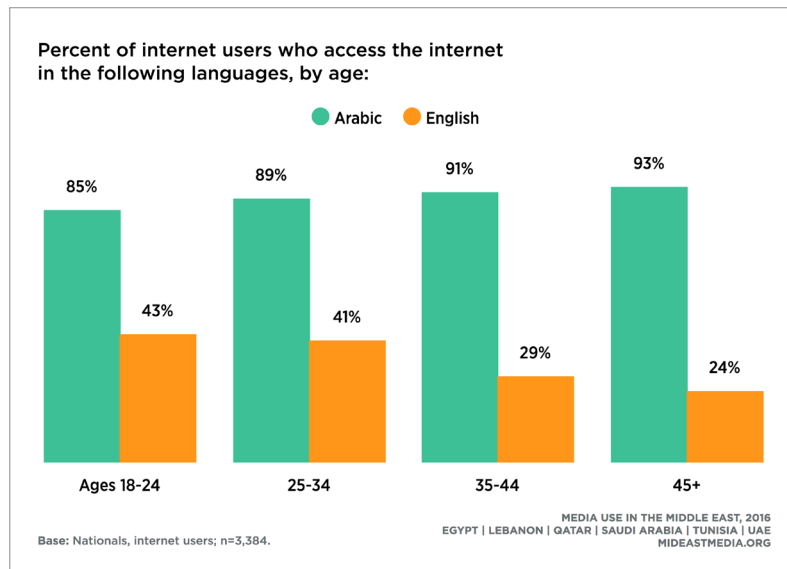


Majorities of internet users spend time online for entertainment, including watching video, listening to music, and watching films (90% video, 78% music, 68% films). Most national internet users pass time online daily, and more do so now than in 2014 (74% vs. 63%). Regionally, four in 10 nationals watch online video daily and three in 10 listen to music online every day (42% and 31%). One in 10 watch films online daily (12%). Checking the news online is also popular; 85% of nationals generally check news online and 40% check daily.

Young adults (18-24) are more likely than any other age group to pass time online daily (79% of 18 to 24 year-olds vs. 67% of those 45 years and older). The youngest adults (18-24) compared to the oldest adults (45+) are twice as likely to watch online video daily, four times as likely to listen to music daily, and four times as likely to watch films online daily (video: 53% vs. 24%, music: 46% vs. 10%, films: 17% vs. 4%). Checking online news daily is least common among those 45 years and older (33% vs. 39% of 18 to 24 year-olds, 42% of 25 to 34 year-olds, 45% of 35 to 44 year-olds).

Internet users with at least a university education are more likely than those with less education to engage in online activities daily such as checking news, listening to music, and watching video content (news: 44% university vs. 29% primary, music: 36% university vs. 20% primary, video: 46% university vs. 32% primary).

Across the region, four in 10 nationals who access music, news, and films do so online. Emiratis are most likely to access music and films online (64% and 57%). While fewer nationals access TV online, Emiratis and Saudis are the most likely to do so (23% overall vs. 29% each Emiratis and Saudis). More Qataris than other nationals access news online (56%). Tunisians are least likely to access a variety of media online (38% music, 34% news, 17% TV). Only one-third of Egyptians access films online. Broadband limitations may play a role in Tunisia and Egypt.

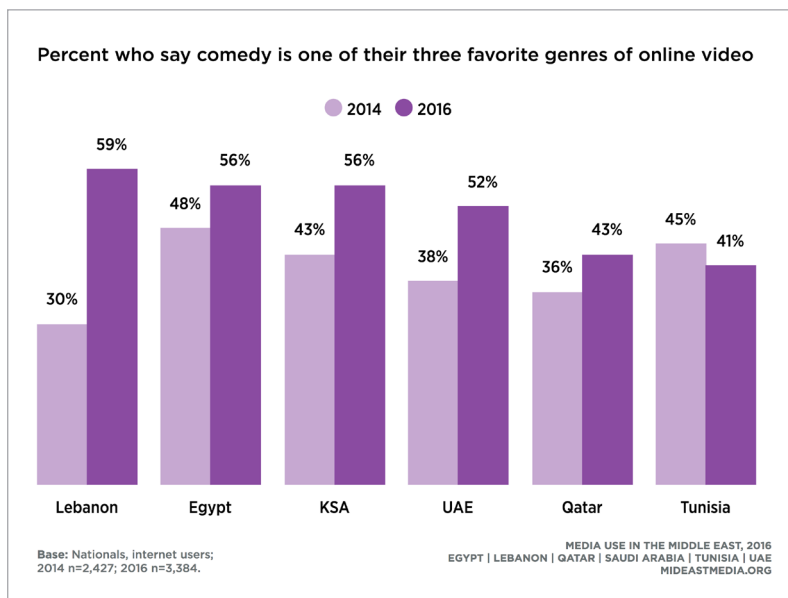


Approximately three to four times as many respondents ages 18 to 24 access music, news, films, and TV programs online than those 45 years and older. Only 8% with a primary education or less access music online compared to 28% of those with intermediate, 51% with secondary, and 62% with university educations. The pattern is similar for accessing both news and film online. More than 10 times as many university-educated nationals access TV programs online as those with the lowest education (34% vs. 3%).

Large majorities in all countries access the internet in Arabic, from 99% in Egypt, Saudi Arabia, and the UAE to 94% in Qatar, 81% in Lebanon, and 68% in Tunisia. A majority of internet users in Lebanon use English online (62%), as do about four in 10 internet users from Tunisia, Qatar, and the UAE (44% Tunisia, 41% Qatar, 37% UAE). A majority of Tunisians access the internet in French (84%), compared to few or none in other countries. English use online varies by country, but from 2013 to 2016 it declined in Lebanon, Qatar, and marginally in Egypt (Lebanon: 79% vs. 62%, Qatar: 56% vs. 41%, Egypt: 24% vs. 18%). English use remains low in Saudi Arabia (11% 2013 vs. 13% 2016). Accessing English on the internet is on an upward trend in the UAE (26% in 2013 vs. 37% in 2016).

Forty-three percent of internet users ages 18 to 24 years old access the internet in English, compared to 24% of those 45 years and older. Those with at least a secondary education are more likely to access the internet in English than the least-educated respondents (46% university or higher and 30% secondary vs. 24% intermediate and 16% primary or less).

## Online Video

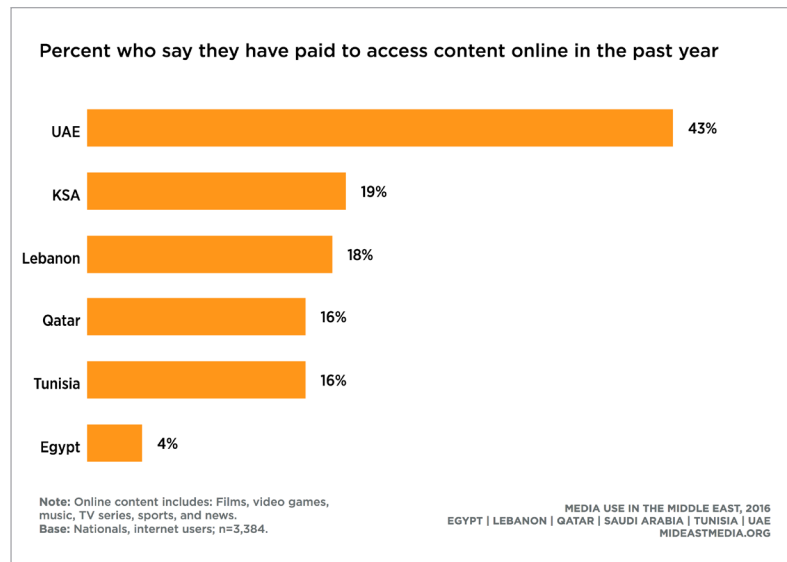


Comedy, news, and music were respondents' three favorite online video genres in both 2014 and 2016. Compared to 2014, more respondents in 2016 list comedy as one of their three favorite genres in Lebanon, Egypt, Saudi Arabia, and the UAE (Lebanon: 30% to 59%, Egypt: 48% to 56%, KSA: 43% to 56%, UAE: 38% to 52%). The popularity of music videos remained steady everywhere except Tunisia and the UAE where they grew in popularity between 2014 and 2016 (Tunisia: 32% to 51%, UAE: 19% to 30%). Favor for news dropped in Egypt, but increased in Saudi Arabia and Tunisia over the same two years (Egypt: 41% to 25% vs. KSA: 17% to 31% and Tunisia: 30% to 38%).

More men than women cite sports, news, and documentaries as favorite online video genres (sports: 37% vs. 5%, news: 32% vs. 24%, documentaries: 22% vs. 18%). Women more frequently than men list drama, fashion, and children/family-oriented content as favorite online videos (drama 26% vs. 20%, fashion: 24% vs. 5%, children/family: 12% vs. 7%).

More cultural conservatives than progressives favor news and religious/spiritual programming (news: 31% vs. 23%, religious/spiritual: 20% vs. 11%). However, more progressives than conservatives cite online comedy and music videos among their favorite content (comedy: 57% vs. 50%, music: 36% vs. 28%).

Nationals who believe their country is headed in the right direction are more likely to report religious/spiritual programming among their three favorite online video genres (20% vs. 8% wrong track), whereas more of those who say their country is on the wrong track prefer documentaries (25% vs. 19% right track). However, both groups are equally likely to cite comedy, music, and news as their top three favorite online video genres.



Of the video content national internet users access online, 53% is related to entertainment compared to 38% related to news and information, according to respondents' best estimates. Qataris are the only nationals to say they watch more news than entertainment online (49% news/informational vs. 46% entertainment). Qatari, Saudi, and Tunisian internet users report small increases from 2014 to 2016 in estimates of the portions of their online video diets filled by entertainment (Qataris: 37% to 46%, Saudis: 53% to 56%, Tunisians: 47% to 51%). Between 2014 and 2016, the proportion of time spent watching news/informational videos decreased among Lebanese, Saudis, Tunisians, and Emiratis (Lebanese: 41% to 34%, Saudis: 37% to 34%, Tunisians: 46% to 39%, Emiratis: 45% to 41%).

Watching entertainment videos online is more common among 18 to 24 year-olds than those 45 years and older (59% vs. 45%). The oldest respondents (45+) watch more news and information videos than any other age group (43% vs. 41% of 35 to 44 year-olds, 38% of 25 to 34 year-olds, 34% of 18 to 24 year-olds).

Few nationals are willing to pay for any content online and even fewer said they have paid for online content in the past year (willing to pay: 26% and have paid: 17%). More Emiratis are willing to pay for online content than other nationals (47%). More men than women are both willing to pay for and have paid for online sports content in the past year (men willing: 15% and men paid: 10% vs. women: 2% either willing to or have paid).

Eighteen to 24 year-old national internet users are much more willing than those 45 years and older to pay for films, video games, and music online (films: 14% vs. 4%, games: 11% vs. 4%, music: 11% vs. 2%). While more of the youngest adults (18-24) have paid for digital content than older respondents, the proportions remain low: 6% to 9% of 18 to 24 year-olds have paid for music, sports, and video games in the past year, compared to 2% to 4% of those over 45 years old.



# FILM

Young people's interest in American films does not appear to reduce their interest in Arab films. They are more likely than older people to watch films from all regions, including their own.



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## In this chapter

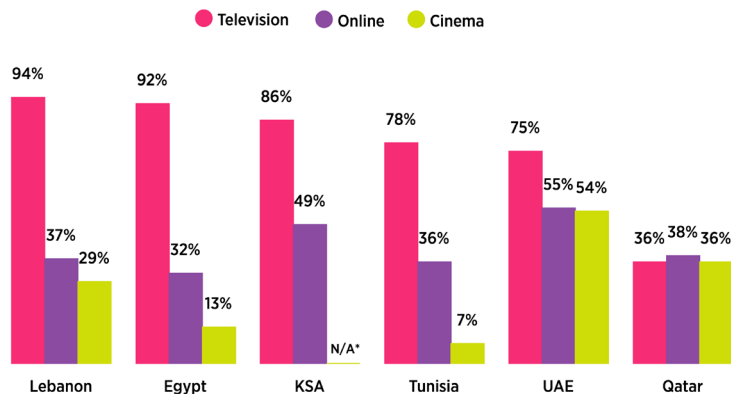
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- Platforms: Television, Cinemas, and the Internet
- Languages and Origins of Films
- Cultural Attitudes and Preferences



## Platforms: Television, Cinemas, and the Internet

Percent who watched films on TV, online, and in the cinema in the past six months



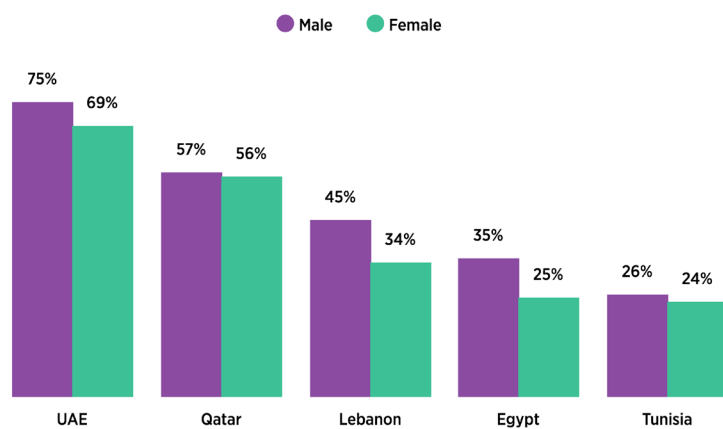
\* Question not asked because there are no official cinemas in Saudi Arabia. Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Films remain a major form of entertainment in the Middle East, but the way people watch them is changing. Television continues to be the most common medium for film distribution, with nine in 10 people watching films on TV. However, only six in 10 Qataris say they watch films on TV, down from eight in 10 in 2014. Qataris are turning to other methods for their film viewing; they are now as likely to watch films online as on TV (62% each), and more Qataris watch films at the cinema in 2016 compared to 2014 (56% in 2016 vs. 43% in 2014).

Cinema attendance is highest, and increasing, in the UAE. More than seven in 10 Emiratis attend the cinema, up five percentage points from 2014 (72% in 2016 vs. 67% 2014). This is perhaps not surprising given the comparatively large number of cinemas per capita in the UAE. In comparison, only a quarter of Tunisians attend the cinema, which might be considered high given Tunisia has fewer than 10 cinemas in the country. Cinema attendance remains steady at three in 10 in Egypt (30% in 2016 vs. 28% in 2014), despite a relatively small number of cinemas per capita. Lebanon is the only country that saw a decline in cinema attendance (39% in 2016 vs. 46% in 2014). Men in the region are more likely than women to attend the cinema (40% vs. 33%)—this gender gap is most pronounced in Lebanon and Egypt.

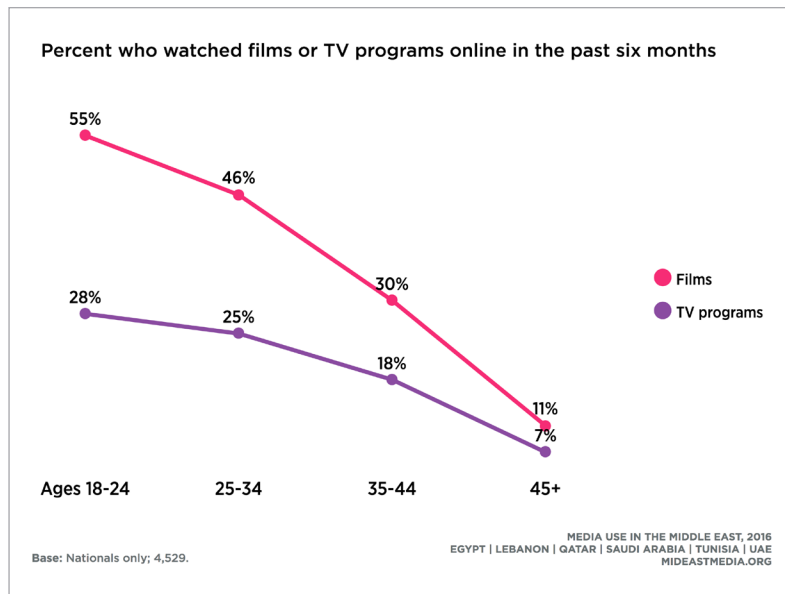
Percent who watch films in the cinema, by gender



Note: Question was not asked in Saudi Arabia. Base: Nationals only; n= 3,913.

MEDIA USE IN THE MIDDLE EAST, 2016  
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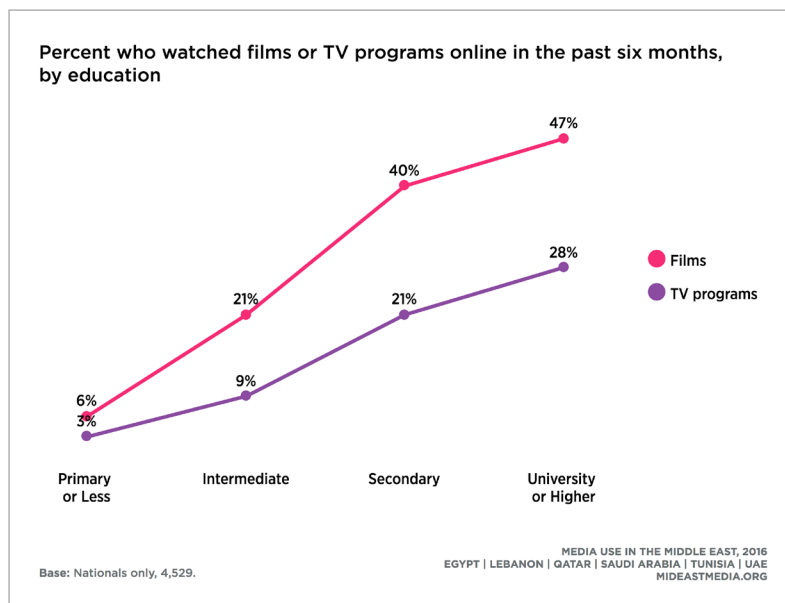
While film viewing overall remained relatively stable since 2014, the frequency with which people watch films declined in some countries. Fewer Egyptians, Lebanese, and Saudis watch films online on a weekly basis, with steep declines in Egypt and Saudi Arabia between 2014 and 2016 (Egypt: 51% vs. 42%, Saudi Arabia: 63% vs. 37%). Overall, fewer nationals are watching films on TV on a weekly basis compared to 2014 (70% in 2016 vs. 76% in 2014). This decline is driven by Qatar, Saudi Arabia, and Tunisia; watching films on TV remains steady in Egypt, Lebanon, and the UAE. On the other hand, Qataris and Emiratis are far more likely to watch films online in 2016 compared to 2014 (Qatar: 31% vs. 50%, UAE: 20% vs. 38%).



Films play a larger role in the entertainment of young adults. The 18 to 24 year-old age group is most likely to watch films on all platforms, including TV, online, and in the cinema. Most notably, half of 18 to 24 year-olds watch films online on a weekly basis, more than any other age group (39% of 25 to 34 year-olds, 30% of 35 to 44 year-olds, 17% of those 45 years and older). This pattern is observed in all countries.

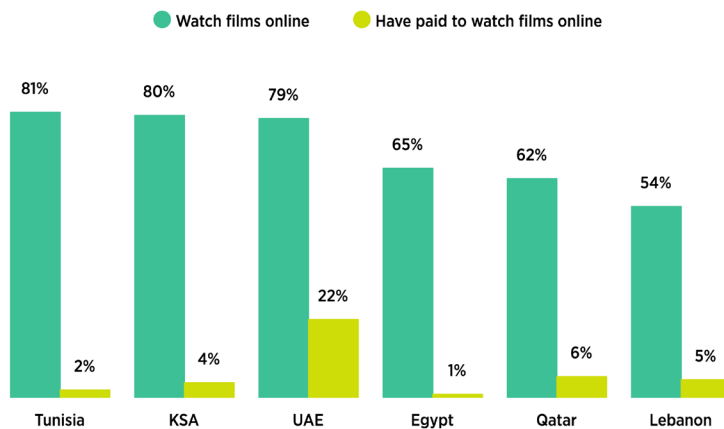
Nationals in the Gulf States are more likely to watch films online than those in Egypt, Lebanon, and Tunisia, which may have more to do with greater broadband speeds than with interest levels.

Similar patterns emerge among nationals watching film as emerge among nationals for accessing TV, music, and news content. For example, young adults are more likely to go online for all forms of entertainment, including films. Six in 10 18 to 24 year-olds watch films online, compared to half of 25 to 34 year-olds, one-third of 35 to 44 year-olds, and only 14% of those 45 years and older. This pattern is observed in all countries. Young adults also watch films at the cinema more frequently. People with higher levels of education are more likely to use the internet to access all forms of entertainment, including film. More than half of university-educated nationals who watch films do so online, compared to less than one-tenth of those with a primary school education or less (57% vs. 7%).





Percent who watch films online vs. percent who pay to watch films online



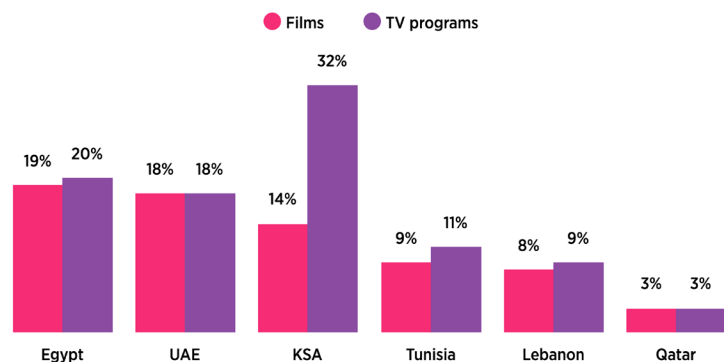
Note: Respondents were asked if they have paid to watch films online in past year.  
Base: Nationals, internet users; n=3,384.

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While many nationals turn to the internet for entertainment, relatively few are willing to pay for online content. Only 26% of nationals would be willing to pay for any online content, and just 17% of internet users have paid for any kind of online content in the past year. Even fewer, only 8%, would be willing to pay for films online and just 5% of internet users paid to watch a film online in the past year. Emiratis are an outlier, as one in five paid to watch films online and one in five would also be willing to do so. Overall, however, those who say they watch films online are not paying for films and are unlikely to pay for them (6% have paid, 12% willing to pay).

Films are also not being discussed online as much as other types of content. Only 12% of nationals report sending, sharing, or posting about films in the past month. This contrasts with three-fourths of internet users sending, sharing, or posting content about news or entertainment overall online in the past month. Films are also discussed less online than videos, news, music, sports, advertising, and TV programs (43% videos, 30% news, 25% music, 18% sports, 17% advertising, 16% TV programs).

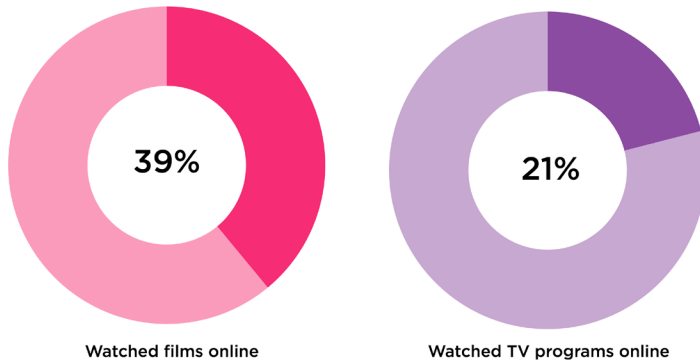
Percent of internet users who sent or shared content or comments online related to the following topics in the past month:



Base: Nationals, internet users; n=3,384.

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Percent who have watched films and TV programs online in the past six months



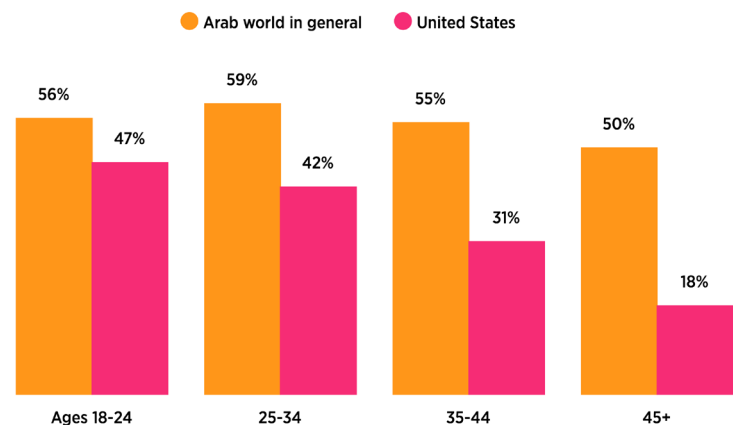
Base: Nationals only; 4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Some cultural views are associated with consuming entertainment online. Watching films online is more common among those who see benefits in watching international content than those who do not (44% agree vs. 36% do not agree). Similarly, self-described cultural progressives are significantly more likely than conservatives to access films online (51% vs. 35%). This wide disparity is common across all countries for both perceived benefits of international content and cultural leanings.

## Languages and Origins of Films

Percent who watch films from the following regions, by age:



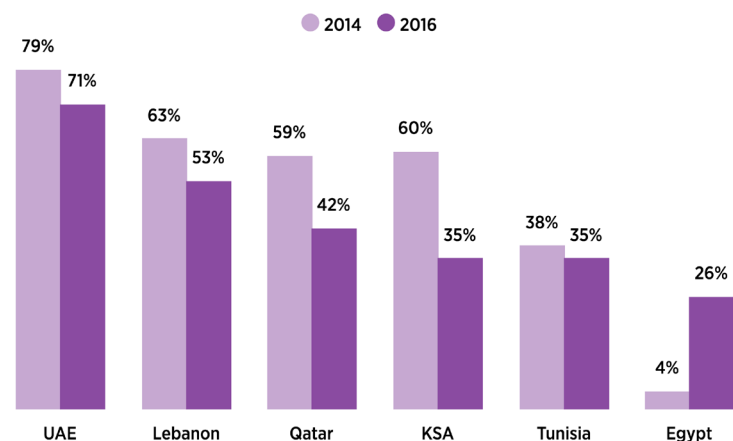
Base: Nationals only; n= 4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Young people ages 18 to 24 years old are more likely to watch American films than do people over 45 years old (47% vs. 18%), but this does not appear to be a cultural trade-off. Young people are just as, or slightly more, likely to watch Arab films compared to the oldest adults (45+) (56% vs. 50%).

Nearly all nationals watching films watch in Arabic (96%). Two-fifths watch films in English, a slight decline from 2014 (42% in 2016 vs. 46% in 2014). Watching English-language films declined in all countries, except for Egypt, which experienced a significant increase (4% in 2014 vs. 27% in 2016). Even with that jump, people in Egypt, still the most prolific film production hub in the region, are less likely to watch films in English than other nationals in the region. Viewing English-language films remains most popular in the UAE despite a modest decline (74% in 2016 vs. 80% in 2014).

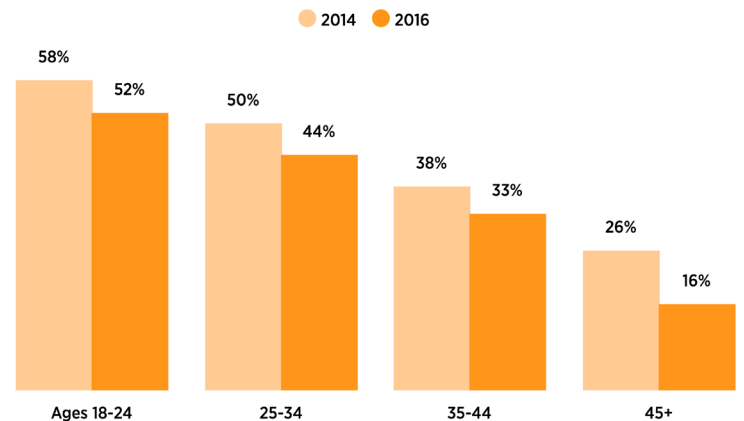
Percent who say they watch films in English



Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Percent who watch films in English, by age



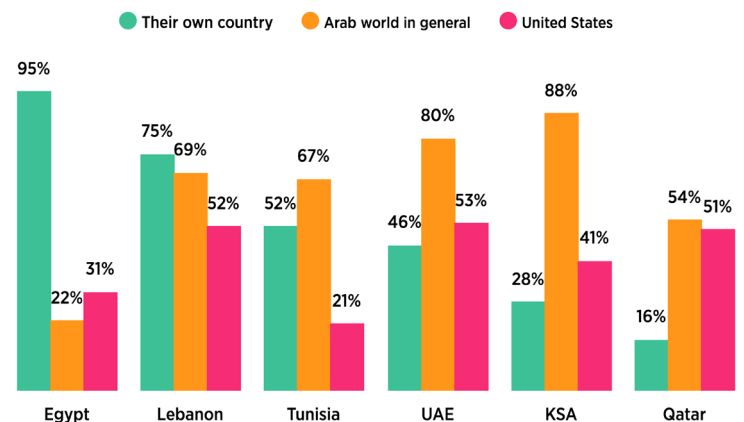
Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Men, young adults, and university-educated nationals are more likely to be watching English-language films than their respective counterparts. Watching films in English is also more common among nationals who watch films online and among those who attend the cinema. Nationals who believe people benefit from watching content from different parts of the world are more likely to watch films in English than those who do not see benefits to international exposure (48% agree vs. 34% do not agree).

Egypt is the top producer of mainstream film content in the region, and Egyptian theatres show a much higher proportion of domestic films. Ninety-five percent of Egyptians watch domestically-produced films, and that number climbs to 99% among Egyptians who watch films online. Only in Egypt and Lebanon do more people say they watch films from their own country than films from the Arab world in general.

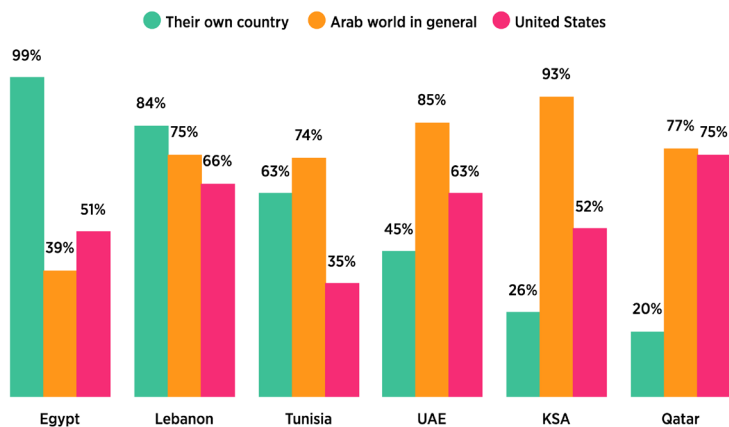
Percent who say they watch films from...



Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Percent of those who watch films online who watch films from...



Base: Nationals, online film viewers; n=1,756.

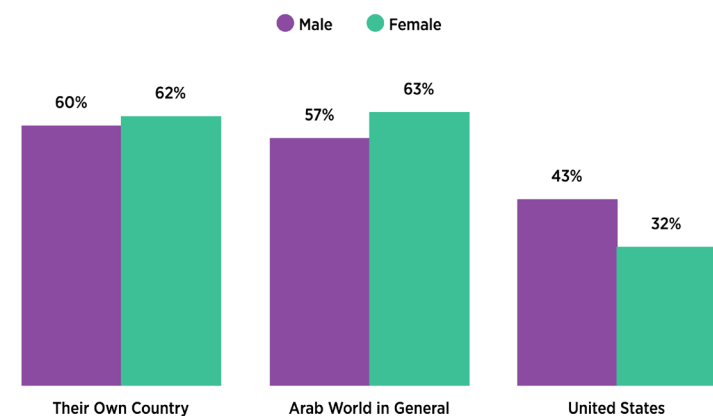
MEDIA USE IN THE MIDDLE EAST, 2016  
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Domestic films also generate the majority of box office revenues in Lebanon, where 78% of film watchers watch Lebanese films. In the UAE, on the other hand, Emirati films comprise a much smaller proportion of titles screened at the box office. Emirati nationals watch Arab-region and U.S. films more than Emirati films (83% Arab, 55% U.S., 48% Emirati).

Across the region, two-fifths of nationals watch films from the United States, down from 2014 (40% in 2016 vs. 46% 2014), but the trend varies by country. The proportion of nationals watching U.S. films decreased in Lebanon, Tunisia, and the UAE. Men are more likely than women to watch U.S. and European films, while more women than men watch Arab, Indian, and Turkish films.

A sizeable minority report that some of the films and TV programs they want to watch are not available in their country (43%), and it appears that nationals are turning to the internet to access films from around the world. Those who watch films online are far more likely than those who don't to watch films from the U.S. (54% vs. 31%), India (42% vs. 28%), Europe (40% vs. 20%), and the Arab region (72% vs. 58%), but nationals who both do and do not watch films online watch domestically produced films in similar proportions (63% vs. 67%).

Percent who watch films from the following regions, by gender:

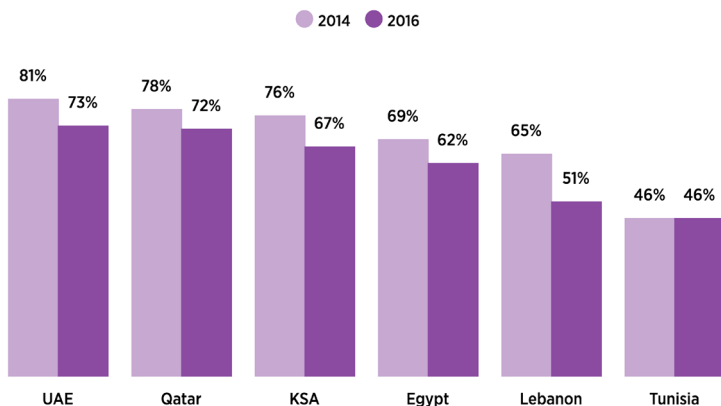


Base: Nationals only; n=4,529.

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## Cultural Attitudes and Preferences

Percent who agree:  
"I prefer to watch films that portray my own culture"



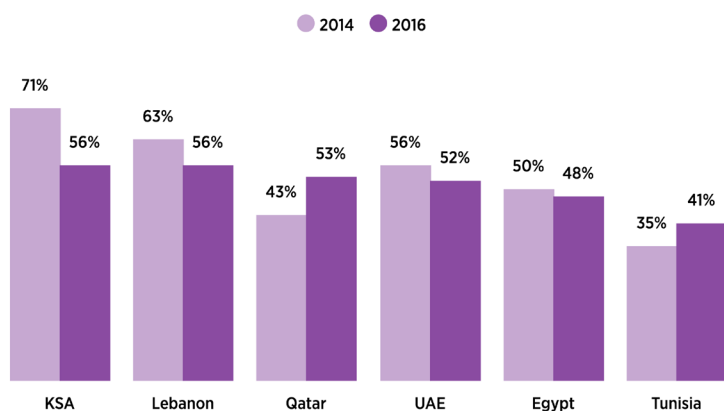
Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

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Fifty-eight percent of nationals prefer watching films portraying their own culture, down from 65% in 2014. This decline is observed in all countries except Tunisia. Qataris and Emiratis are the most likely to prefer films about their own culture, but this preference declined (Qatar: 78% in 2014 vs. 72% in 2016; UAE: 81% in 2014 vs. 73% in 2016). Tunisia remains the only country where a minority express a preference for films about their own culture (46% in 2014 and in 2016).

Interest in entertainment based on national culture and history eroded some in Lebanon, Saudi Arabia, and the UAE. However, interest in entertainment about one's culture and history held quite steady in Tunisia and Qatar, and even increased in Egypt. Qataris are significantly more likely than nationals from any other country to be interested in more entertainment media based on national culture and history (80%). Interest in nationally particular content is also higher among those with a secondary or higher education (55% primary or less and 56% intermediary vs. 63% secondary and 61% university or higher).

Percent who agree:  
"Films are an important source of information about one's own culture"

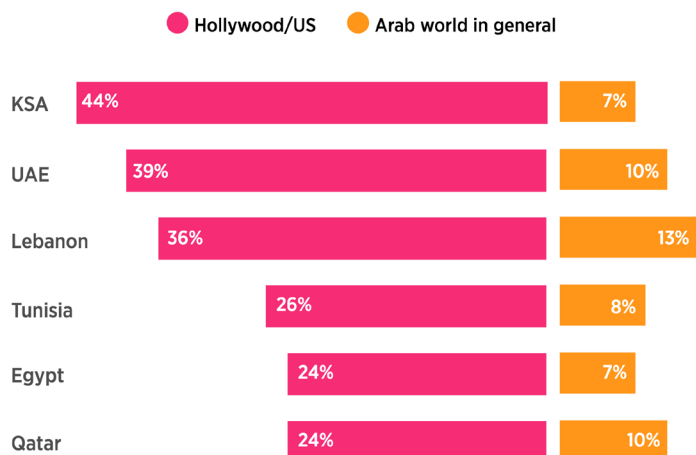


Base: Nationals only;  
2014 n= 4,171; 2016 n= 4,529.

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Overall, half of nationals feel films are an important source of information about one's own culture, similar to 2014 (50% in 2016 vs. 53% in 2014). Lebanese and Saudis are now less likely to agree that films provide information about culture than in 2014, while Qataris and Tunisians are more likely to agree. Cultural progressives are more likely than conservatives to feel films provide information about one's culture (62% vs. 48%).

### Percent who say films from Hollywood or the Arab world are harmful for morality



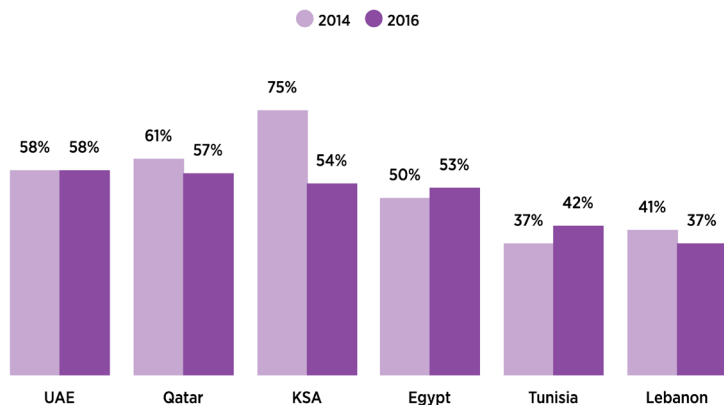
Base: Nationals only; n=4,529.

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Media from within the country or within the Arab world in general are seen by far more nationals as “good for morality” than media from the U.S. or Europe. Half of nationals feel films and TV from their own country are “very” or “somewhat” good for morality and four in 10 feel the same about content from the Arab world in general. These sentiments starkly contrast with the one in five nationals who feels content from the U.S. and Europe is good for morality. Progressives are more likely than conservatives to believe content from the U.S. and Europe are good for morality. Men and more educated nationals are more likely than their counterparts to believe content from Hollywood or the U.S. is good for morality.

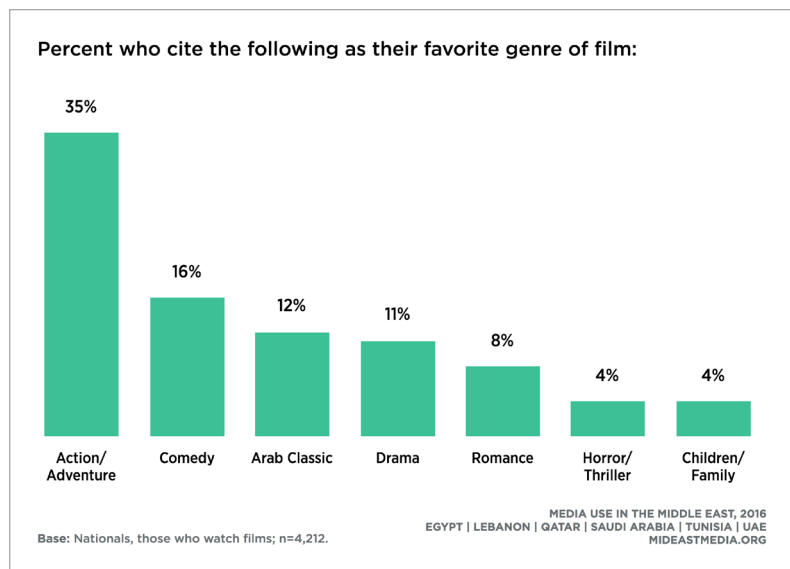
Comedy continues to dominate as the favorite film genre, followed by action/adventure and drama (62% comedy, 51% action/adventure, 41% drama). This pattern is generally consistent across the region and reflects the same preferences as in 2014. The one exception is Qatar, where horror/thriller and romance films are preferred over dramas.

### Percent who agree: “Entertainment media are an important part of my conversations with friends and family”



Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

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Strong gender differences persist in film preferences. While both genders enjoy comedy, more men are drawn to action/adventure and horror/thriller films, while more women prefer dramas, romance, and Arab classics. Nationals describing themselves as culturally conservative are also more drawn to Arab classics and are more likely to list it as a top-three genre than their culturally progressive counterparts (31% vs. 20%).







# TELEVISION

Two-thirds of Arab nationals still primarily watch TV programming at scheduled broadcast times as opposed to streaming shows online or watching them on demand.



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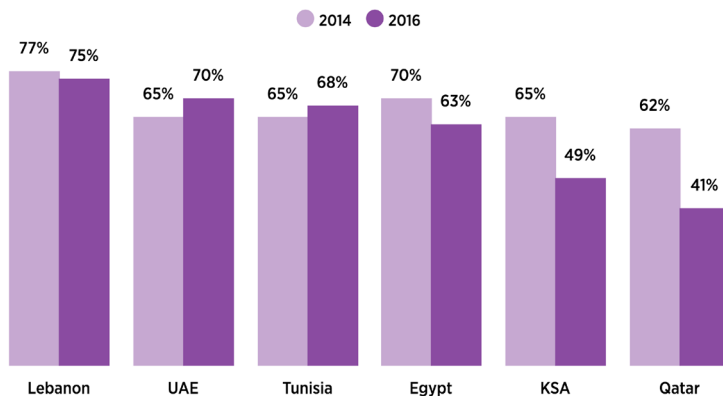
## In this chapter

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- TV and the Internet
- Languages and Origins of TV Programs
- Binge-watching
- Genre Preferences
- Regional Constraints and VPN Use

## TV and the Internet

Percent who watch TV programs every day



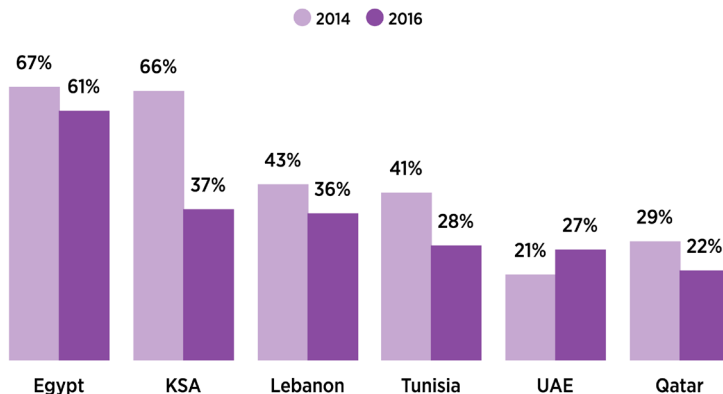
Base: Nationals only; 2014 n= 4,171; 2016 n= 4,529.

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Television remains an important source of entertainment in the region, but is losing ground to the internet. Nearly all nationals watch TV (95% in 2014 and 2016), but daily viewing has declined five percentage points since 2014 (64% in 2016 vs. 69% in 2014). The decline is most notable in Qatar, Saudi Arabia, and Egypt between 2014 and 2016 (Qatar: 62% vs. 41%, KSA: 65% vs. 49%, Egypt: 70% vs. 63%). As fewer nationals watch TV daily, more nationals spend time online daily. The share of internet users passing time online daily jumped 11 percentage points (63% in 2014 vs. 74% in 2016). More adults pass time online daily than watch TV daily in all countries except Egypt and the UAE, where an equal amount of nationals do both daily.

Women are more likely than men to watch TV every day (67% vs. 60%), while internet users of both genders are equally likely to go online every day (74% women vs. 73% men). Nearly one-fourth of nationals who watch TV have done so via the internet in the past six months (23%); this pattern is relatively consistent across countries.

Percent who watch films on TV every day

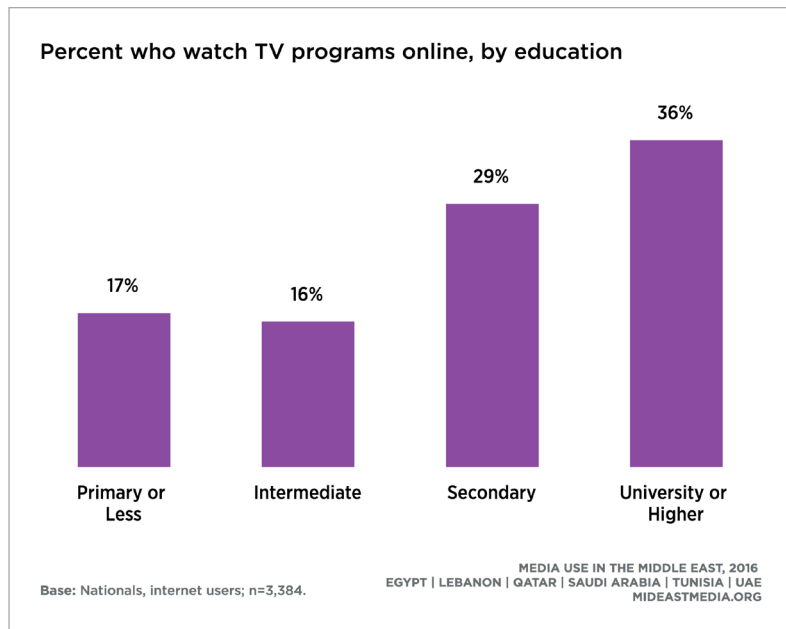


Base: Nationals only;  
2014 n=4,171; 2016 n=4,529.

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The gap between passing time online and watching TV daily is largest among 18 to 24 year-olds (79% vs. 60%)—a 19 percentage point difference favoring being online—and smallest for those 45 years and older, who watch more TV (67% online vs. 70% TV). Additionally, 18 to 24 year-old TV watchers are almost four times as likely to watch online as those 45 years and older (33% vs. 9%).

One-third of university-educated nationals who watch TV do so online (34%), compared to only 3% of those with no more than a primary education.

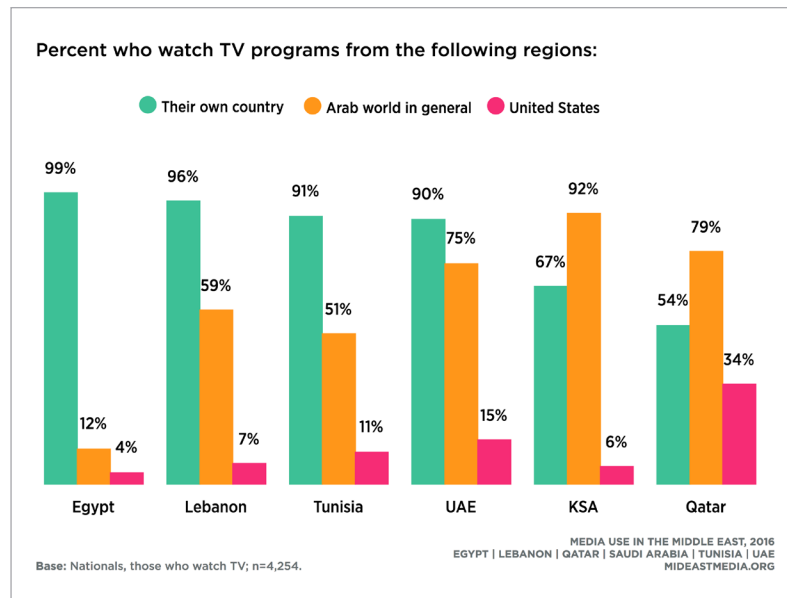


While many nationals go online for entertainment, relatively few are willing to pay for online content. Only 17% of internet users have paid for any online content in the past year, while 26% are willing to pay in the future. Just one in 50 internet users paid to watch a TV series online in the past year (2%) and only 4% say they are willing to pay. The UAE is an exception; 15% of Emiratis are willing to pay for TV content online, though only 6% have paid for content online.

Three in four internet users have shared—that is, sent or posted—about online videos in the past month. Sizeable minorities shared about news and music, but fewer shared about TV in the past month (30% news, 25% music vs. 16% TV). Saudis, Egyptians, and Emiratis are the mostly likely to share about TV programs online (32% Saudis, 20% Egyptians, 18% Emiratis).

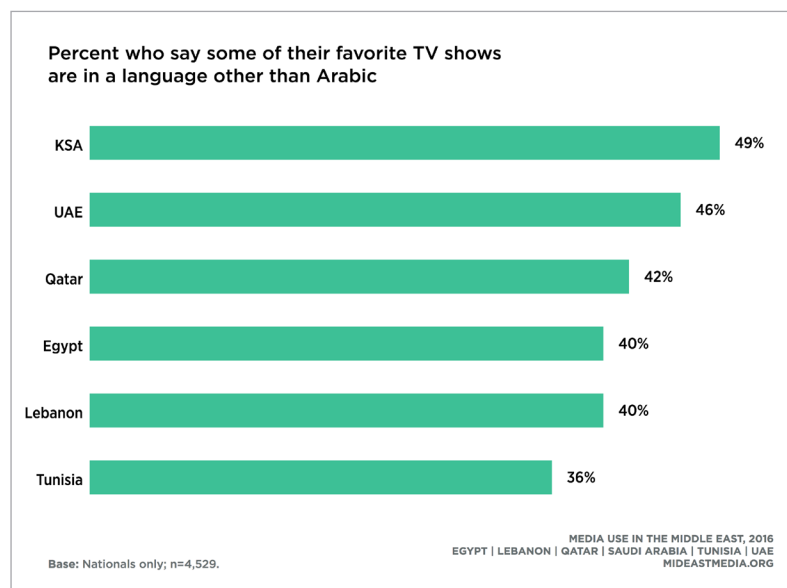
Watching TV programs—and other entertainment media—online is more common among those who see benefits to watching content from other parts of the world (26% of those who see benefits watch TV programs online vs. 17% of those who do not see benefits). Similarly, accessing TV online is significantly more common among self-described cultural progressives than among conservatives (34% progressive vs. 18% conservatives watch TV online).

## Languages and Origins of TV Programs



While most nationals watch TV in Arabic, only one-tenth watch in English (99% vs. 11%). English-language viewing is down from 18% overall in 2014, driven especially by the declines in Lebanon, Saudi Arabia, and Qatar. Use of English is less common for TV than for films, internet, and music (42% films, 37% internet, 30% music). Very few Egyptians and Saudis watch TV in English (3% and 8%); this represents a 30 percentage-point drop in Saudi Arabia, from 38% of nationals watching English-language TV in 2014. Consumption of TV in English remains highest in Qatar and the UAE (32% and 24%), despite a decline from 39% among Qataris in 2014.

Though young and university-educated nationals are more likely to watch TV in English, less than one in five are watching in English (18% of 18 to 24 year-olds and 18% of university or more highly educated).

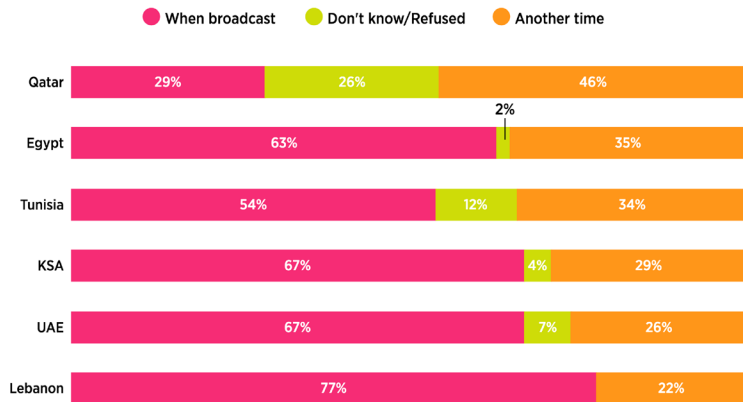


Nearly all nationals in Egypt, Lebanon, Tunisia, and the UAE watch domestic programming (99% Egypt, 96% Lebanon, 91% Tunisia, 90% UAE), reflecting the status of all of those nations, except Tunisia, as top producers of scripted TV programming in the region. Production in Qatar is limited to locally broadcast programs, and perhaps consequently, fewer Qataris watch domestic TV (54%) (Media Industries in the Middle East, 2016). Fewer Saudis watch nationally produced programming as well (67%). Saudis, Qataris, and Emiratis are among the most likely to watch TV programs produced in the Arab world (92% Saudis, 79% Qataris, 75% Emiratis). Egyptians watch Egyptian TV programming almost exclusively.

Exposure to TV from outside the Arab region is low, with just one in 10 or fewer nationals saying they watch TV content from the U.S., Europe, Turkey, or India. Qataris are the most likely to watch U.S. programming (34%). One in five Lebanese and Saudis watch Turkish TV (20% and 19%). Those who access TV content online are more likely to watch U.S. programming, especially in Qatar, the UAE, and Tunisia (52% Qatar, 28% UAE, 26% Tunisia).

## Binge-watching

Percent who usually watch their favorite TV programs when broadcast vs. at another time



Base: Nationals, those who watch TV; n=4,254.

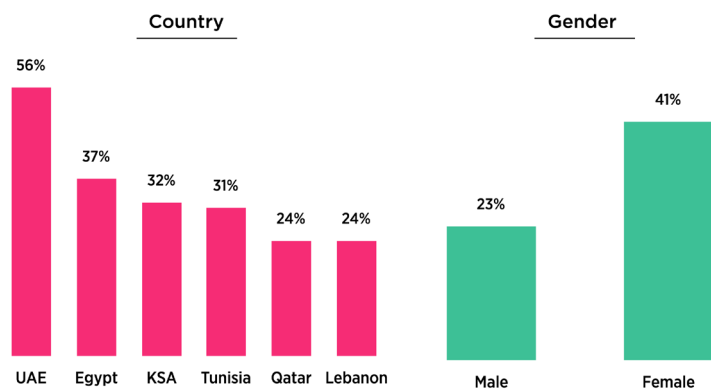
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While it is now possible for many consumers to choose when they watch TV programs as opposed to a set broadcast time, two-thirds of Arab nationals still primarily watch TV at scheduled broadcast times (64% broadcast time vs. 31% other time). Unlike other nationals, Qataris are more likely to watch TV programming at some time other than when it is broadcast (46% other time vs. 29% broadcast time).

One-third of nationals are “binge-watching” TV content, defined as watching multiple episodes of a program in close succession. This trend is seen in all countries, with the UAE having by far the most binge-watchers (56%).

Among those who watch TV, viewing at broadcast times is more common among women than men (70% vs. 58%), and binge-watching TV programs is almost twice as likely among women as men (42% vs. 24%).

Percent who say they have binge-watched a TV series in the past six months

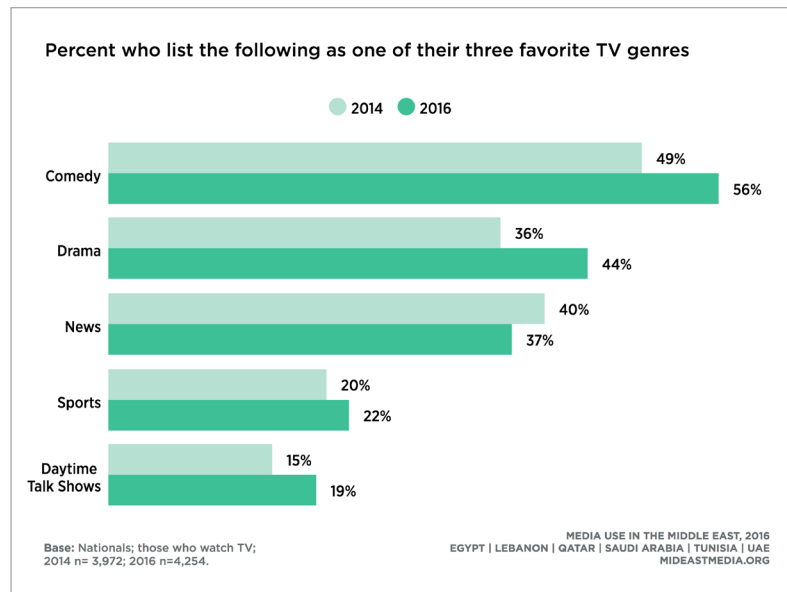


Note: Respondents were asked, “In the past six months, have you “binge watched” a television series? By this we mean watch multiple episodes in close succession. This might be online or offline using a DVR, DVD player, computer, tablet, or other video-enabled mobile device. Base: Nationals only; n=4,529.

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Expatriates—Westerners in particular—are more likely than nationals to watch TV content at a time other than when it is broadcast (Western expatriates 43%, Asian expatriates 38%, Arab expatriates 36% vs. Arab nationals 31%).

## Genre Preferences

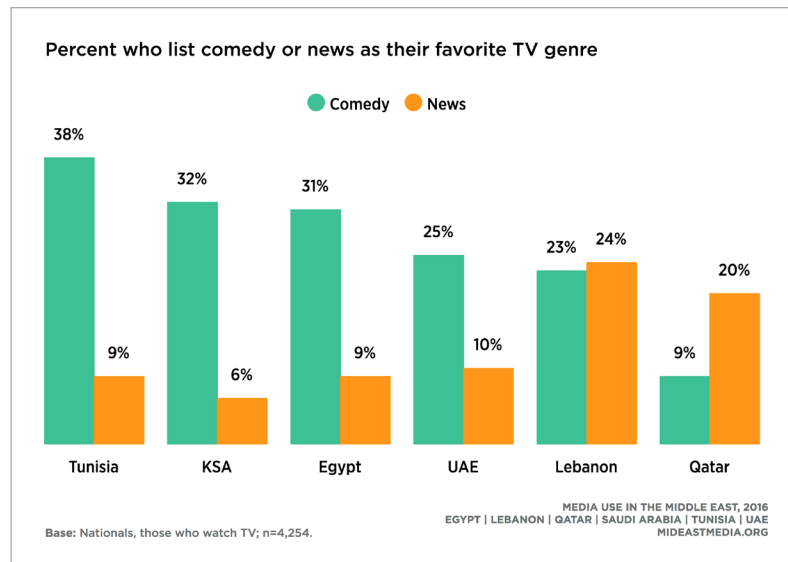


As in 2014, comedy is the favorite TV genre, followed by drama and news (56% comedy, 44% drama, 37% news). This pattern is generally consistent across the region and similar to 2014, except drama surpassed news in 2016. Three notable exceptions include Qatar, where news, documentaries, and drama are the three favorite genres (36% news, 32% documentaries, 24% drama), Saudi Arabia, where daytime talk shows are preferred over news (31% vs. 27%), and the UAE, where spiritual/religious programming is as popular as news (29% vs. 28%).

While both genders enjoy comedy on TV relatively equally (54% men and 57% women), more men than women show interest in news, sports, and documentary programming (news: 46% vs. 28%, sports: 39% vs. 5%, documentary: 23% vs. 13%). More women, however, enjoy drama, daytime talk shows, religious/spiritual, family, and fashion programming (drama: 55% vs. 33%, daytime talk: 23% vs. 15%, religious/spiritual: 20% vs. 15%, family: 24% vs. 10%, fashion: 14% vs. 3%).

Religious TV programming gained popularity between 2014 and 2016 in Egypt, Saudi Arabia, and the UAE (Egypt: 17% vs. 24%, KSA: 6% vs. 20%, UAE: 16% and 29%), but declined in popularity in Qatar (40% in 2014 vs. 22% in 2016). Similarly, sports on TV increased in popularity in Egypt, Saudi Arabia, and the UAE (Egypt: 20% vs. 28%, KSA: 15% vs. 23%, UAE: 16% vs. 27%), but declined in Qatar and Tunisia (Qatar: 30% vs. 18%, Tunisia: 29% vs. 21%).





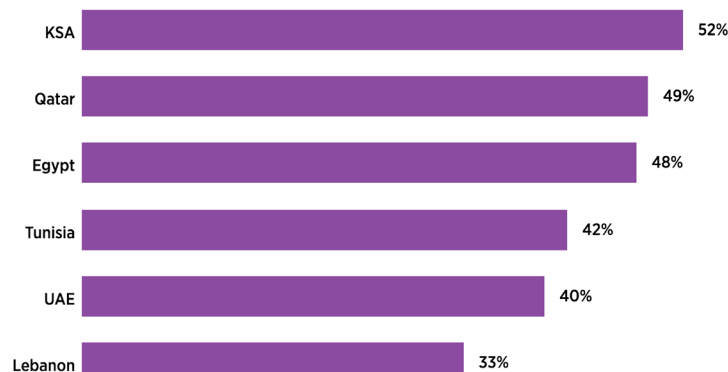
Nearly twice as many Egyptian and Qatari women compared to their male counterparts show a preference for religious/spiritual programming (Egypt: 31% vs. 17%, Qatar: 30% vs. 15%). Cultural conservatives are twice as likely as progressives to list religious/spiritual programming as a favorite TV genre (22% vs. 11%).

Lebanese continue to be the most interested in news (51% in 2014 and 49% in 2016). Egypt stands out as a notable exception to both the stable appeal of news on TV and increasing appeal of news online. The popularity of both TV and online news as favorite genres dropped significantly among Egyptians between 2014 and 2016 (TV: 42% vs. 32%, online: 41% vs. 25%). More Egyptians, however, now cite other genres such as drama, sports, children's programming, reality TV, music videos, and religious/spiritual programming among their favorite TV genres compared to 2014.



## Regional Constraints and VPN Use

Percent who agree: "Some of the films and TV programs I would like to watch are not available in my country"



Base: Nationals only; n=4,529.

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Four in 10 nationals say some of the films and TV programs they want to watch are unavailable in their country (43%). This sentiment is fairly consistent across countries, ranging from 33% in Lebanon to 52% in Saudi Arabia. Four in 10 also say some of their favorite TV shows are in a language other than Arabic (41%).

Those who agree that entertainment content from other parts of the world is beneficial are twice as likely as those who disagree to complain about a lack of availability of desired film and TV content in their country (51% of those who agree vs. 25% of those who disagree). Those same nationals also more often indicate their favorite shows are not in Arabic (52% of those who agree vs. 20% of those who disagree).

Additionally, more VPN (Virtual Private Network) or proxy service users report that some of their preferred entertainment is not available in their country (54% VPN vs. 45% no VPN), which is perhaps a motive to use a VPN.

Cultural progressives, compared to their conservative counterparts, more commonly report that shows they want to watch are inaccessible (55% vs. 42%) or that their favorite shows are not in Arabic (53% vs. 38%).

Those who worry about governments checking what they do online are also more likely to report that some content they want to watch is unavailable in their country or not available in Arabic (54% and 55%) compared to four in 10 nationals who do not express those worries (39% unavailable and 40% non-Arabic).



# MUSIC

While 78% of internet users listen to music online, only 4% have paid to do so in the past year.



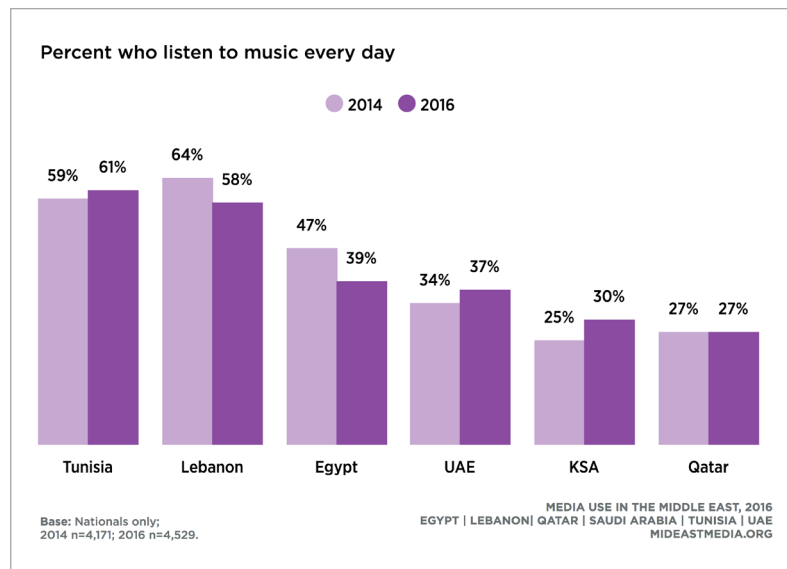
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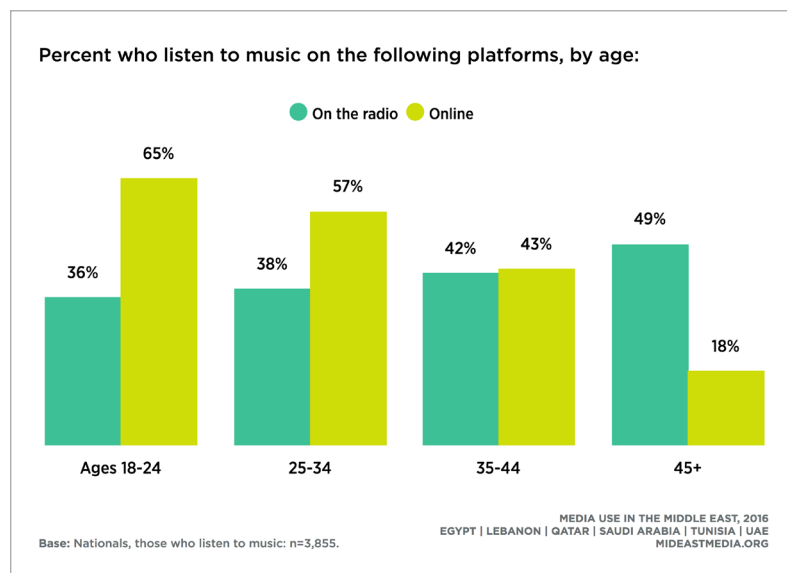
- Listening Habits
- Means of Accessing Music
- Music Preferences by Language and Origin
- Paying for and Sharing Music Online

## Listening Habits



Similar to 2014, over eight in 10 nationals say they listen to music for entertainment (85% in 2016 and 82% in 2014). More Lebanese and Tunisians listen to music than other nationalities—about nine in 10 for both years—and about six in 10 respondents from both of these countries listen daily. However, barely half of Qataris listen to music (53% in 2014 and 55% in 2016) and only one-quarter listen daily (27% in both years). Similarly, only one in three Emiratis listen to music every day.

The youngest nationals (18-24) are more likely than older respondents to listen to music at all, to listen more often, to listen to more genres, and to discuss music more online. Accessing music through multiple platforms, including digitally, is also more common among younger adults, while older adults rely more on TV.

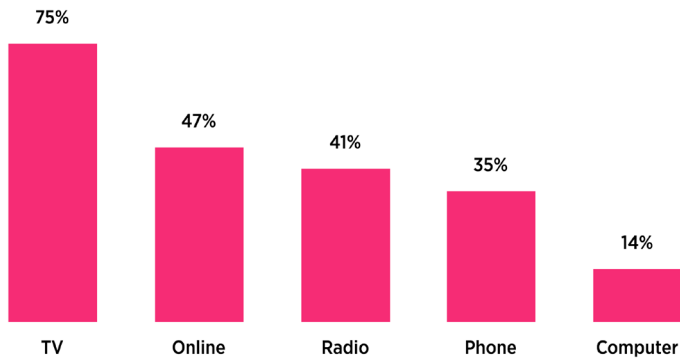


Most internet users stream music online. Three-quarters of internet users listen to music online in general and nearly one in three listen daily (78% and 31%). Tunisians are most likely to listen to online music daily (52%), while fewer Lebanese and Saudis stream music online every day (22% of each nationality).

Younger nationals listen to music online more than older nationals. Nine in 10 18 to 24 year-olds listen to music online in general and nearly half listen daily (46%) compared the oldest group (45+), of whom half listen online generally and only 10% listen daily.

## Means of Accessing Music

Percent who listened to music on the following platforms in the past six months:



Base: Nationals, those who listen to music; n=3,855.

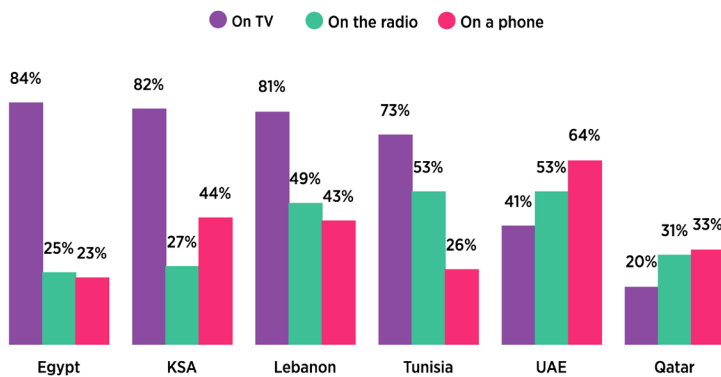
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TV is the most common platform for listening to music across the region, with three in four nationals watching music videos on TV. Music videos are very popular in all countries, except fewer than half of nationals access music on TV in Qatar and the UAE (20% and 41%).

Overall, four in 10 nationals listen to music on the radio, ranging from about one-quarter of nationals in Egypt and Saudi Arabia to half of Emiratis and Tunisians.

Nearly half of those who listen to music access it online at least some of the time (47%). This is fairly consistent across countries, yet ranges from 38% in Tunisia to 64% in the UAE. Emiratis are more likely than other nationals to listen to music on a phone (64%), while using a phone to listen to music is least common among Egyptians and Tunisians (23% and 26%).

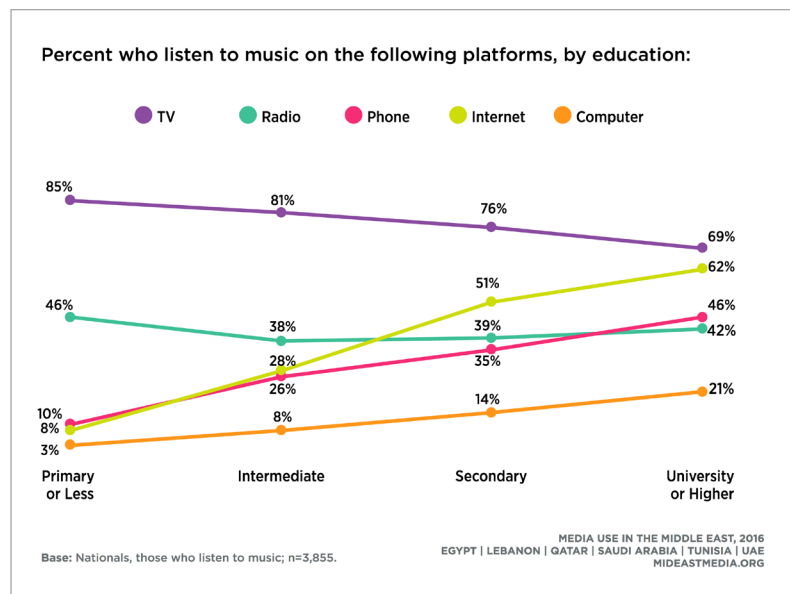
Percent who listen to music on the following platforms:



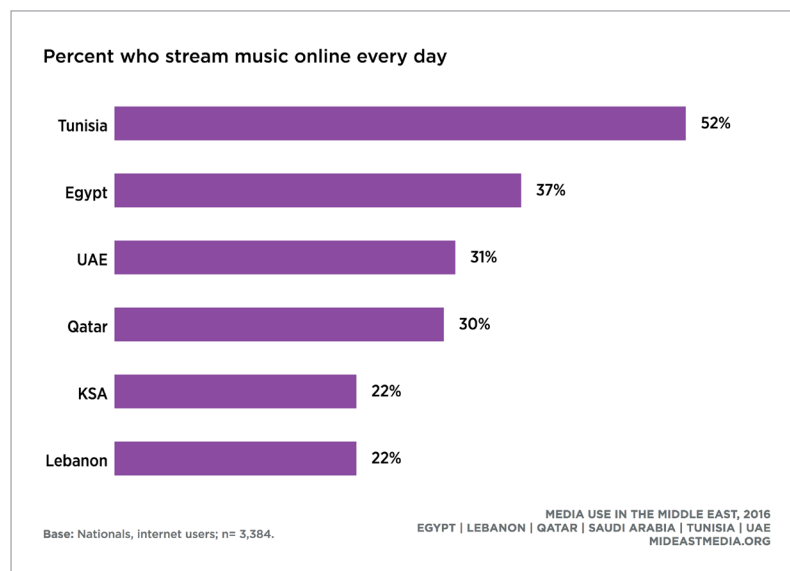
Base: Nationals, those who listen to music; n=3,855.

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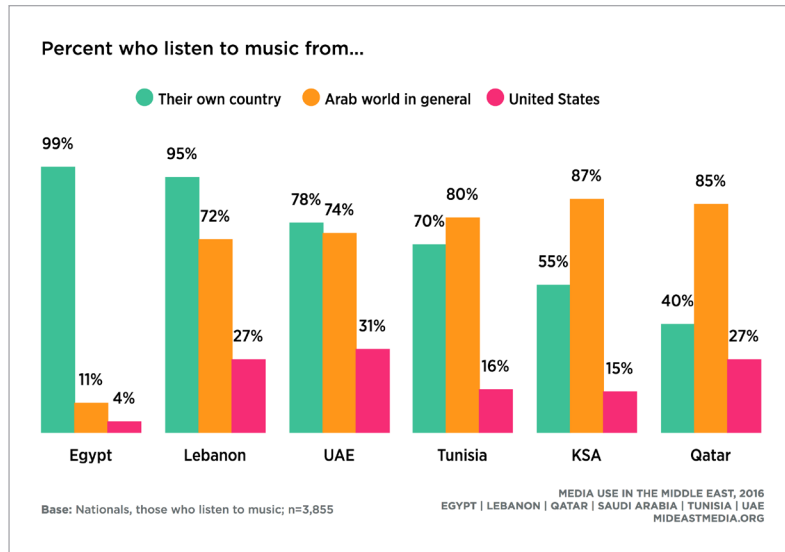
Older nationals are far less likely than younger respondents to access music digitally. While only 18% of those 45 years and older access music online, the proportion increases to 43% and 57% among the two middle age groups and rises to two-thirds (65%) of the youngest group (18-24). Similarly, the youngest nationals (18-24) are over three times more likely than the oldest group (45+) to listen to music on a phone (49% vs. 14%). All age groups use TV to access music more than any other source, ranging from 72% to 80% across age groups. The oldest adults (45+) are less diverse in their music habits, relying more heavily on traditional sources such as TV and radio.



Preferences for sources of music vary by education level. Only 8% of primary-educated nationals listen to music online, compared to over half of respondents with at least a university education (62%). The least educated, on the other hand, are more likely to listen to music on TV (85% vs. 69% university or more).



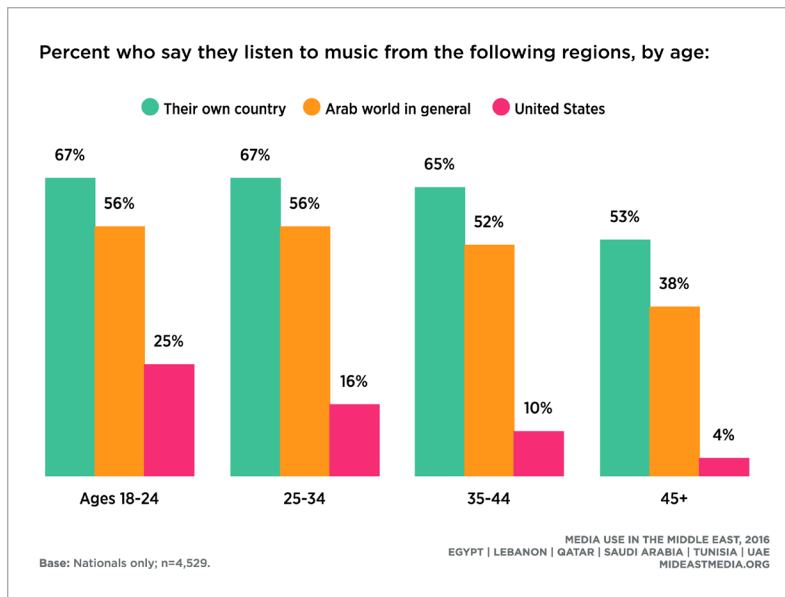
## Music Preferences by Language and Origin



Interest in English music decreases with age. Younger nationals are the most likely age group to listen to music in English, 45% in both 2014 and 2016. This contrasts with only one-third of 25 to 34 year-olds and one-quarter of 35 to 44 year-olds listening in English (35% and 23%). Only 11% of those 45 years and older listen to English-language music, down slightly from 17% in 2014.

Nationals with at least a university education are most likely to listen to music—and use any other media—in English. The proportion listening to English-language music rises from 6% of the least-educated nationals to 45% of the most-educated nationals.

While the overall proportion declined slightly since 2014, most nationals still listen to music from their own country, except Qataris and Saudis. Qataris' interest in national music is low, but rising (40% in 2016 vs. 32% in 2014). The share of Saudis who listen to Saudi music fell sharply (55% in 2016 vs. 85% in 2014). Over 70% of nationals in each country listen to music from across different Arab countries, except for Egyptians, who listen almost exclusively to Egyptian music.

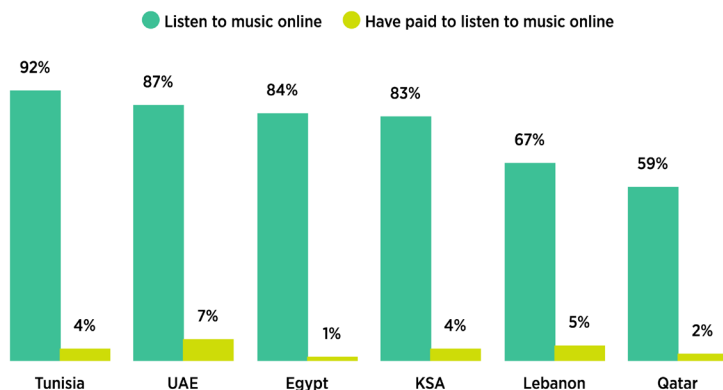


Western music is not popular in these Arab countries. Less than one in five nationals listen to music from either the U.S. or Europe. Compared to 2014, fewer respondents in most countries report listening to music from the U.S., except in Egypt, where a similarly low 4% listen to Western music. European music is most popular among Lebanese and Tunisian nationals (24% and 29%), possibly due to the strong French influence in both countries. Music from the U.S. is most popular among Lebanese, Qataris, and Emiratis (27% Lebanese, 27% Qataris, 31% Emiratis).

While nationals of all ages listen to Arab music, younger adults are far more likely than their oldest counterparts to listen to Western music (18 to 24 year-olds: 27% European music and 29% U.S. music vs. 45 years and older: 8% European music and 5% U.S. music).

## Paying for and Sharing Music Online

Percent who listen to music online vs. percent who pay to listen to music online



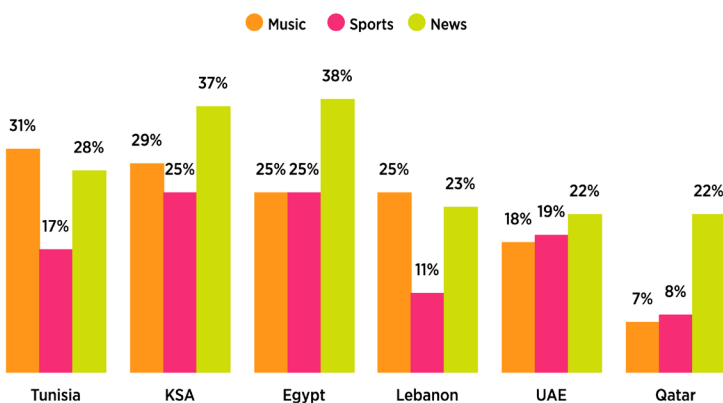
Note: Respondents were asked if they have paid to access music online in past year.  
Base: Nationals, internet users; n=3,384.

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While many nationals listen to music online, they are not inclined to pay for it, as demonstrated by the very low rates of buying any digital content, including movies and games. Just one in 25 internet users paid for music online in the past year (4%), and only 6% are willing to pay for it in the future. Younger internet users are somewhat more likely to pay for online music, perhaps because they are the primary online listeners, but interest in paying for it is low even among the youngest (18-24) respondents (11%).

About one in four internet users share—send or post—content about music online, except in Qatar, where the rate is less than one in 10. More internet users share content about online videos and news than about music, but respondents are more likely to share about music than sports, TV, or films. One-third of 18 to 24 year-olds share content about music online, more than any other age group.

Percent of internet users who shared music, sports, or news content online in the past month



Base: Nationals, internet users; n=3,384.

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Women are more likely than men to share music content online in Egypt, Qatar, Saudi Arabia, and Tunisia by five to 13 percentage points, while proportions are equal for both genders in Lebanon and the UAE. In comparison, men in every country are more likely than women to share sports content online, and both genders tend to share equally about films, TV and online videos.





# GAMES

Three in 10 smartphone users play games on their phone every day.



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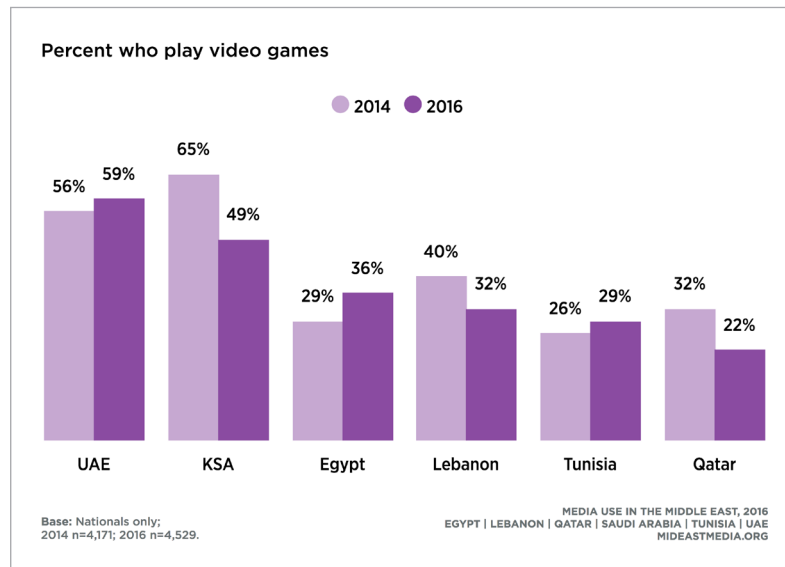
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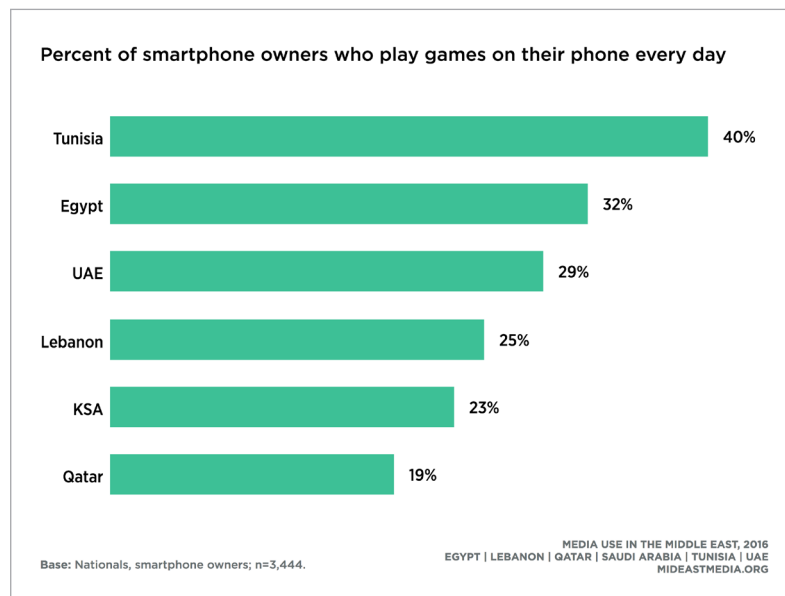
- Platforms and Behavior
- Playing Alone or with Others
- Paying for Online Video Games



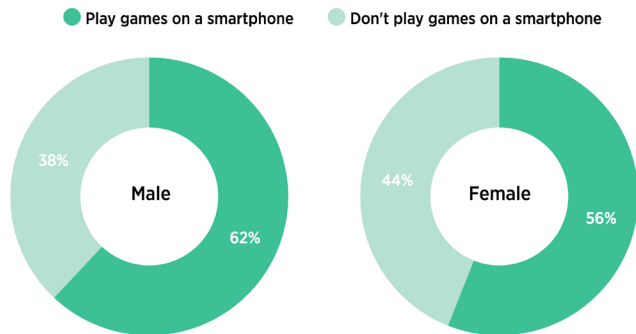
## Platforms and Behavior



Nearly four in 10 nationals in the region play video games (36%). Overall, this has changed little since 2014, though the number of nationals who play video games declined in Lebanon, Qatar, and Saudi Arabia, but rose in Egypt. Only 13% of nationals play video games daily, but nearly one-quarter play video games weekly. Emiratis and Saudis are more likely than other nationals to play video games at least once a week, and Qataris are least likely to do so (37% Emiratis and 31% Saudis vs. 24% Lebanese, 22% Egyptians, 21% Tunisians, 17% Qataris). Only Emiratis exhibit an increase in weekly gaming activity since 2014 (29% in 2014 vs. 37% in 2016). Men are more likely than women to play video games at least once a week (29% vs. 20%), and 18 to 24 year-olds are more likely than all other age groups to play video games weekly (43% of 18 to 24 year-olds vs. 30% of 25 to 34 year-olds, 17% of 35 to 44 year-olds, 6% of those 45 years and older).



Percent of smartphone owners who play games on their phone, by age

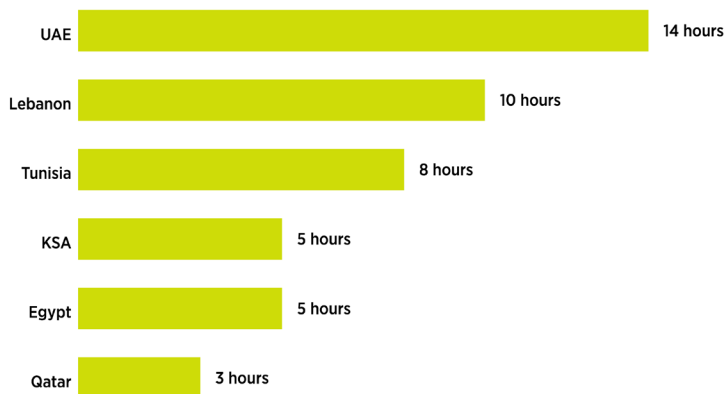


Base: Nationals, smartphone owners; n=3,444.

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Six in 10 nationals who own a smartphone play games on their phone (59%), and about half as many do so daily (28%). Tunisians are the most likely to play games on a phone every day, while Qataris are the least likely. Overall, men are more likely than women to play games on a phone at all as well as daily (at all: 62% men vs. 56% women, daily: 31% men vs. 25% women). Playing games on a phone daily declines with age, with 18 to 24 year-olds almost four times as likely as those 45 years and older to play games on a phone every day (41% vs. 11%). Playing games on a phone increases with education. Only 13% of those with a primary education or less play games on a phone each day, compared to one-third of university graduates.

Median hours spent playing video games per week, among those who play



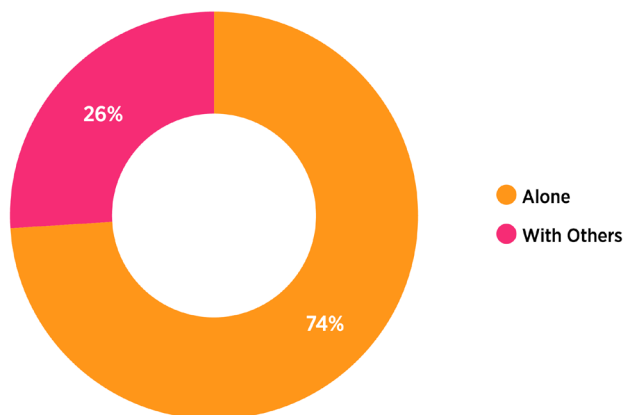
Base: Nationals, those who play video games OR play games on a phone; n= 2,201.

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Among all nationals who play video games or play games on a phone, seven is the median number of hours spent playing video games each week; the median is highest in the UAE at 14 hours and lowest in Qatar at three hours. Women who play video games or games on a phone spend as much time playing video games weekly as men (median: seven hours for both groups). Young adults (18-24) spend the most time playing video games weekly.

## Playing Alone or with Others

Percentage of time spent playing video games alone vs. with others



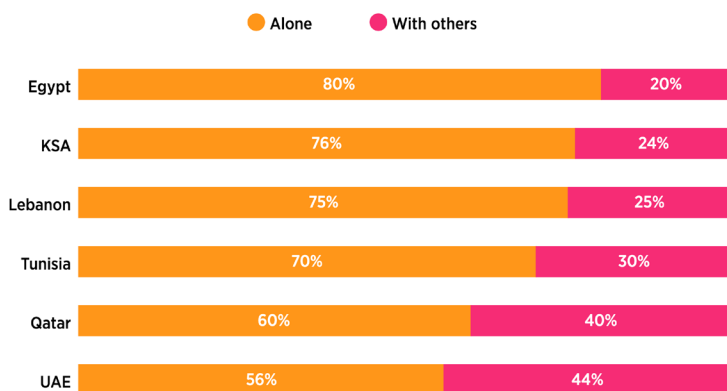
Base: Nationals, those who play video games OR play games on a phone: n= 2,201.

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On average, nationals who play video games or games on a phone report that three-quarters of their gaming time is spent playing alone, and one-quarter of their time is spent playing with others. Compared to other nationals who play video games or games on a phone, Qataris and Emiratis spend more time, on average, playing with others. In addition, Qataris and Emiratis report the highest average percentage of time playing with others online (24% Qataris and 22% Emiratis vs. 17% Lebanese, 10% Saudis, 14% Tunisians, 8% Egyptians).

Men and women both spend the majority of their gaming time alone (70% and 78%), although men are more likely than women to be playing with others overall and specifically online (overall: 30% men vs. 22% women, online: 16% men vs. 11% women). Similarly, younger adults in the region spend more time playing with others in general compared to those ages 35 and older (29% of 18 to 24 year-olds vs. 23% of 35 to 44 year-olds, 22% of those 45 years and older), as well as with others specifically online.

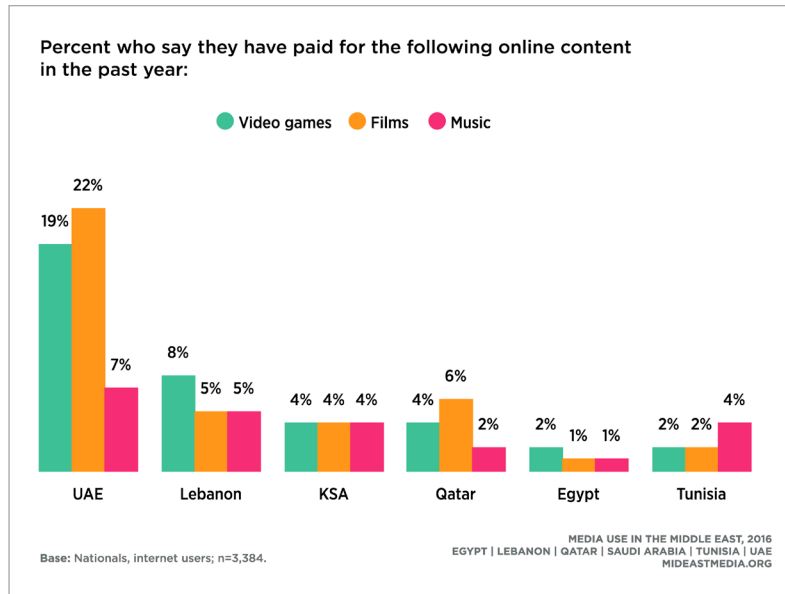
Average percentage of time spent playing video games alone vs. with others, among those who play



Base: Nationals, those who play video games OR play games on a phone: n= 2,201.

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## Paying for Online Video Games



Only 7% of Arab nationals who use the internet say they are willing to pay for online video games. Emiratis, who are the most likely to play video games, are at least twice as likely as any other nationals to be willing to pay for video games online (20% Emiratis vs. 9% Lebanese, 8% Qataris, 5% Saudis, 4% Egyptians, 4% Tunisians). Emiratis are also at least twice as likely to have paid for video games online in the past year (19% vs. 8% or less in other countries). More men than women express a willingness to pay for online video games and to have paid for video games in the past year (willing to pay: 9% men vs. 5% women, have paid: 7% men vs. 4% women), though all of these numbers are generally low. The youngest adults (18-24) are also more likely than the oldest adults to be willing to pay for online video games or to have paid for them in the past year, but still in small numbers (willing to pay: 11% of 18 to 24 year-olds vs. 4% of 45 years and older, have paid: 9% of 18 to 24 year-olds vs. 3% of 45 years and older).





# SPORTS

People are as likely to prefer watching a professional sporting event on TV or online as they are to favor attending in person.



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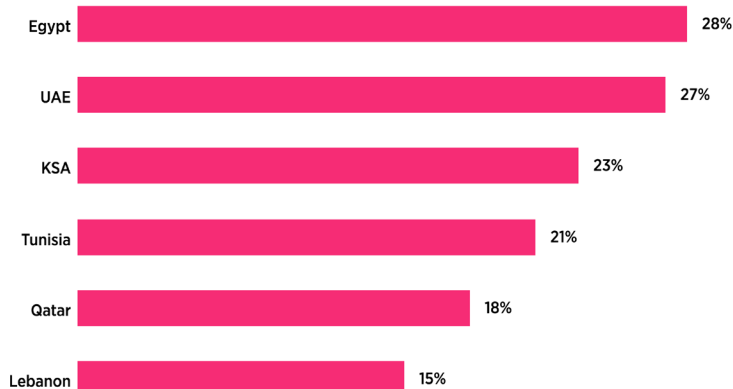
## In this chapter

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- Overall Popularity of Sports
- Popularity of Sports by Age, Gender, and Education
- Viewing and Sharing Sports Content Online

## Overall Popularity of Sports

Percent who cite sports as one of their three favorite TV genres



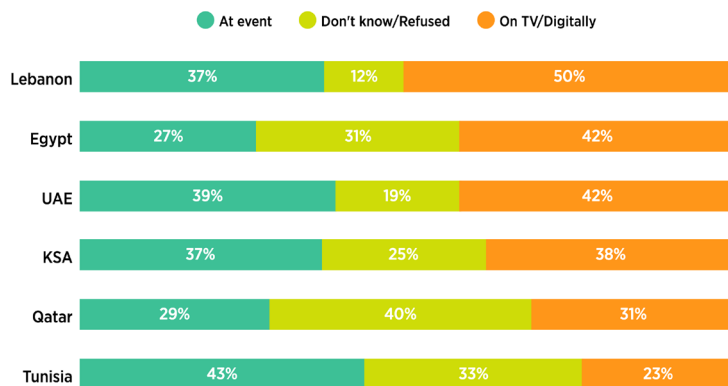
Base: Nationals, those who watch TV; n=4,254.

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Professional sports are an important part of the entertainment landscape in most countries around the world, especially among men, and the Middle East is no exception. When asked about their favorite genres to watch on TV, 22% of nationals mention sports as a top-three genre, behind only comedy, drama, and news (56% comedy, 44% drama, 37% news). Sports on TV is more popular in Egypt and the UAE compared to Lebanon and Qatar (28% Egypt and 27% UAE vs. 15% Lebanon and 18% Qatar).

More nationals who name sports as one of their three favorite TV genres are willing to pay to watch sports than other nationals. One in five of these “sports fans” are willing to pay for online sports content (21%), compared to only 5% of non-fans. In addition, sports fans are nearly four times as likely as non-fans to send, share, or post about sports online (42% vs. 11%). Respondents who play sports/exercise are also otherwise engaged in sports: six in 10 enjoy watching sports on TV and attending sporting events; one in four say sports is one of their favorite TV genres, and one in five share about sports online (61% watch/attend, 28% favorite TV genre, 22% share online).

Percent who prefer attending a professional sporting event vs. watching it on a screen

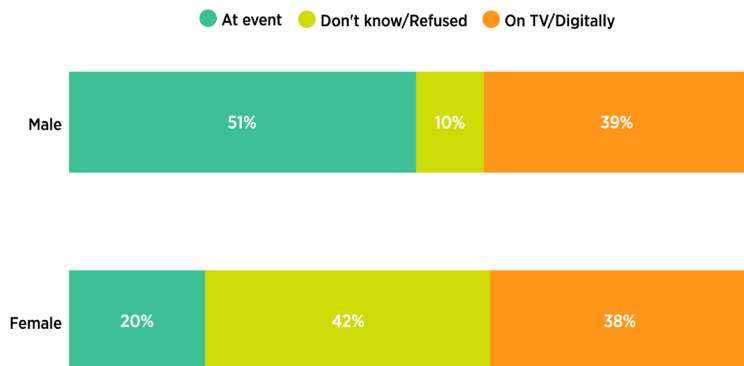


Note: Respondents were asked, “If there were a professional sporting event nearby, and you had the choice of attending the event or watching it on TV or digitally, which would you prefer?”  
Base: Nationals only; n=4,529.

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## Popularity of Sports by Age, Gender, and Education

Percent who prefer attending a professional sporting event vs. watching it on a screen, by gender



Note: Respondents were asked, "If there were a professional sporting event nearby, and you had the choice of attending the event or watching it on TV or digitally, which would you prefer?"  
Base: Nationals only; n= 4,529.

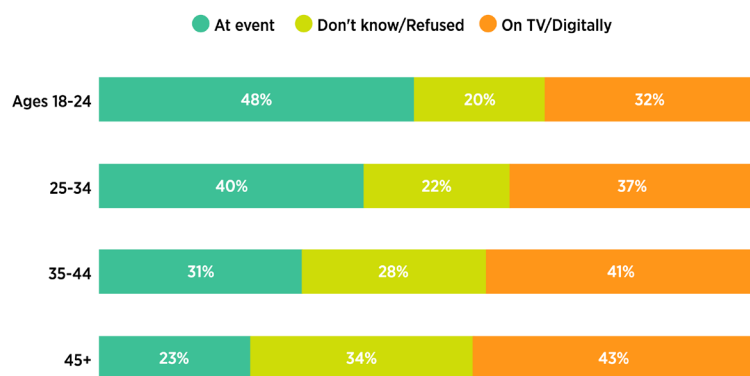
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Three-fourths of male nationals enjoy watching sports on TV/digitally, and an equal number enjoy attending professional sporting events. One-quarter of female nationals enjoy watching and attending professional sports.

Sports are an important source of entertainment among men, especially in Saudi Arabia and the UAE, but less so for men in Tunisia and Qatar. Most Saudi and Emirati men enjoy watching sports on TV (86% and 82%), while fewer Tunisian and Qatari men say the same (60% and 64%).

Age is a factor in interest in sports. Younger nationals are not only more likely to play sports and to exercise, they are also more likely to enjoy both watching sports on TV and attending sporting events. As an example, three-fourths of 18 to 24 year-olds play sports and exercise, compared to only one-third of those 45 years and older (73% vs. 35%). Additionally, six in 10 18 to 24 year-olds enjoy watching and attending sporting events, compared to about one-third of those 45 years and older. Given the choice, younger nationals prefer a live sports experience, while older nationals prefer to watch on TV/digitally (18 to 24 year olds: 48% live vs. 32% TV/digitally, 45 years and older: 23% live vs. 43% TV/digitally).

Percent who prefer attending a professional sporting event vs. watching it on a screen, by age

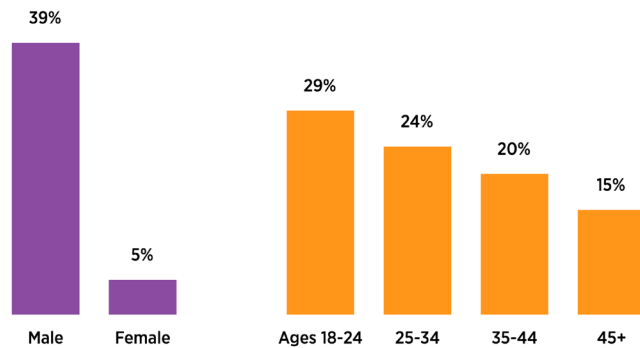


Note: Respondents were asked, "If there were a professional sporting event nearby, and you had the choice of attending the event or watching it on TV or digitally, which would you prefer?"  
Base: Nationals only; n=4,529.

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Percent who cite sports as one of their three favorite TV genres, by gender and age



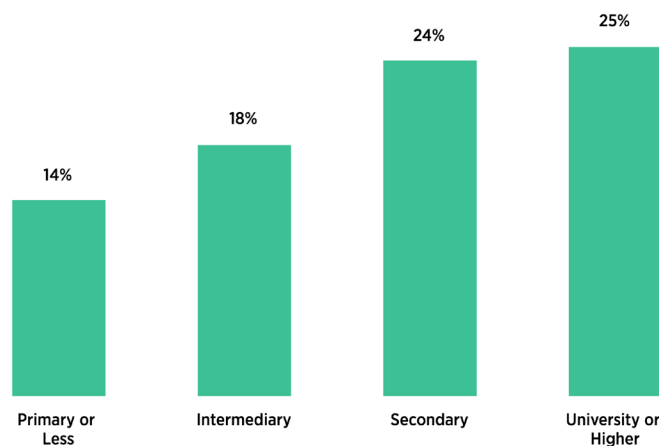
Base: Nationals, those who watch TV; n=4,254.

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When asked whether they prefer attending a sporting event held in their vicinity or watching the same event on a screen, men prefer the in-person event over watching on a screen (51% vs. 39%). This pattern holds across all countries, except Egypt, where men are evenly split between the two (43% in-person vs. 45% screen). More women prefer watching sports on a screen than in person (38% vs. 20%). However, women also generally express less interest in sports, as evidenced by the 42% of women who either refused to answer the question or indicated they did not know their preference.

Men are much more likely than women to name sports as a favorite TV genre. Nearly four in 10 male nationals name sports as a favorite TV genre, compared to 5% of women, making sports the least preferred TV genre among women.

Percent who cite sports as one of their three favorite TV genres, by education



Base: Nationals, those who watch TV; n=4,254.

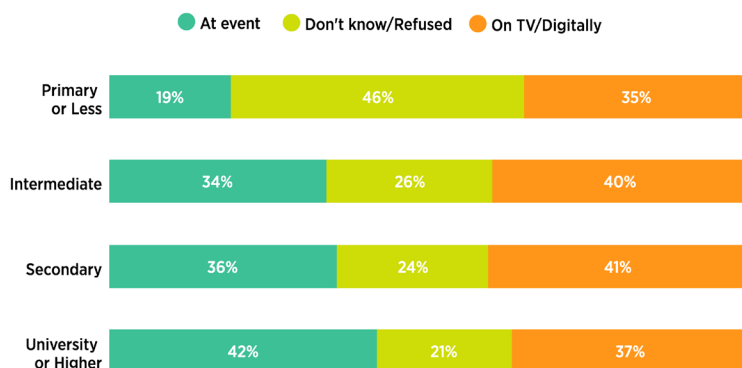
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Interest in sports varies by education, with the most highly educated nationals expressing the greatest interest in sports. The percentage of people who play sports/exercise increases dramatically with education (24% primary or less, 45% intermediate, 59% secondary, 70% university or more). The pattern is the same for enjoying watching sports on TV (29% primary or less, 44% intermediate, 54% secondary, 56% university or more). The percentage of nationals citing sports as one of their three favorite TV genres also rises with education (14% primary or less, 18% intermediate, 24% secondary, 25% university or more).

Given the choice, those with a secondary education or less prefer to watch sports on TV, while those with at least a university education prefer attending a live sporting event.

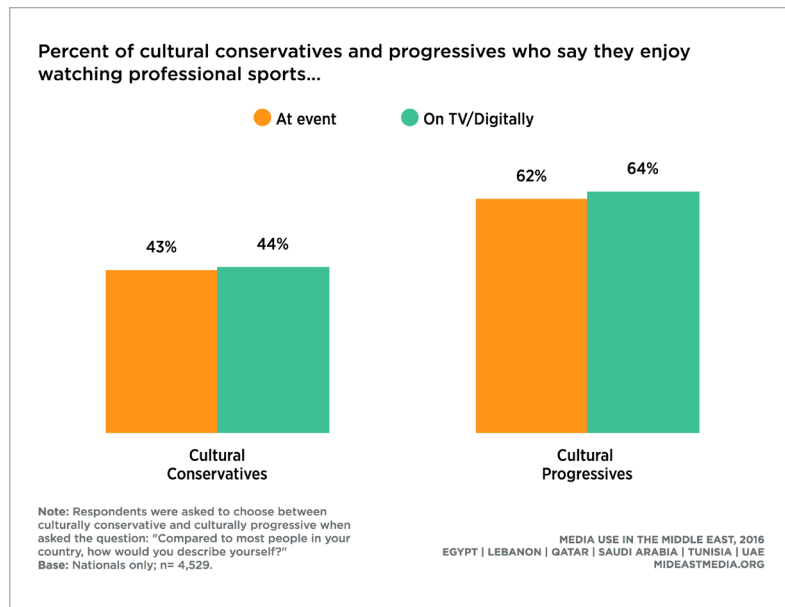
University graduates are far more likely than those with less education to share about sports online—sending or posting content and comments. In fact, university graduates are 10 times more likely to share about sports online than those with a primary education or less (22% vs. 2% primary or less, 13% intermediate, 16% secondary).

Percent who prefer attending a professional sporting event vs. watching it on a screen, by education



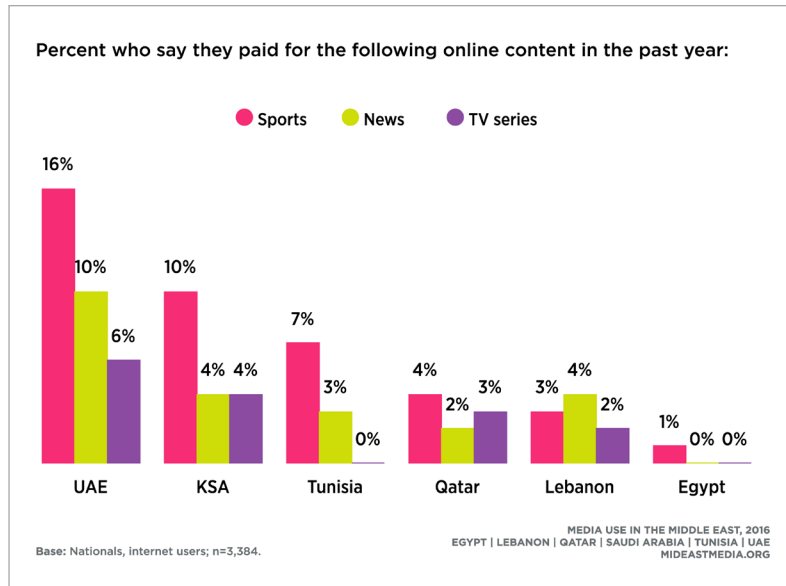
Note: Respondents were asked, "If there were a professional sporting event nearby, and you had the choice of attending the event or watching it on TV or digitally, which would you prefer?"  
Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Nationals who self-identify as more culturally progressive than culturally conservative tend to be sports fans. Far more progressives than conservatives enjoy attending sporting events or watching sports on TV/digitally (attend: 62% progressive vs. 43% conservative, watch: 64% progressive vs. 44% conservative).

## Viewing and Sharing Sports Content Online



While nationals enjoy watching sports, they are not inclined to pay for online sports access, or any other online content. Three-fourths of national internet users have not paid for any online content in the past year, and nearly as many are unwilling to pay (73% have not paid and 68% unwilling to pay). On average, fewer than one in 10 nationals are willing to pay for any single type of online content. That said, more men pay for sports online than any other online content (10% sports, 7% video games, 6% films, 4% news, 4% music, 1% TV series).

Emiratis and Saudis are more likely than other nationals to have paid for sports content online in the past year (16% and 10%), while very few Egyptians, Lebanese, or Qataris have done so (1% Egyptians, 3% Lebanese, 4% Qataris).

Nearly one in five internet users share about sports online—that is, send or post comments and content (18%). Sharing online about sports is less common among nationals than sharing online about videos, news, or music (43% video, 30% news, 25% music), but similar to the proportion of nationals sharing online about advertising and TV programs (17% and 16%).

Men are far more likely than women to share about sports online (30% vs. 5%). Men share online about both sports and news equally (33% share about news).

Younger nationals are twice as likely as the oldest respondents to send, share, or post about sports content online (22% of 18 to 24 year-olds vs. 11% of those 45 years and older).





# NEWS

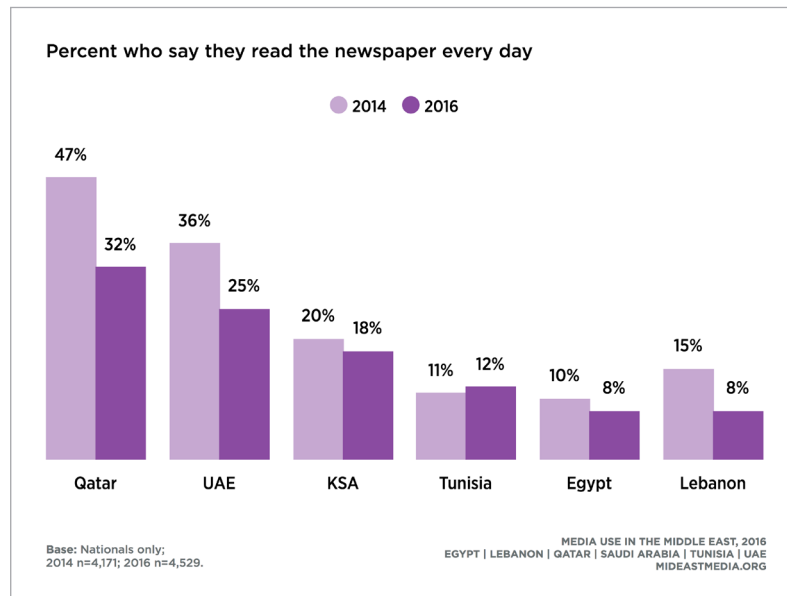
Popularity of online and TV news remained stable or increased in all countries except Egypt.



## In this chapter

- Platforms for Accessing News
- Digital News Use
- A Focus on Egypt

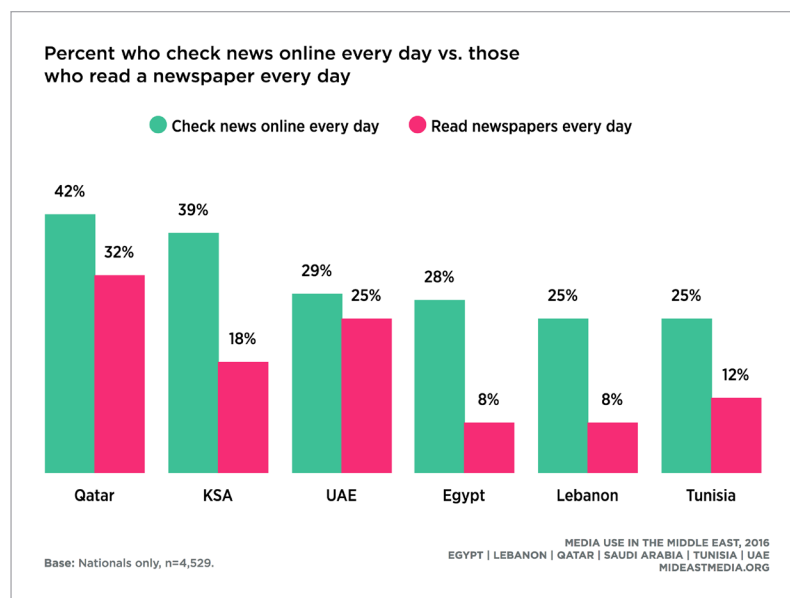
## Platforms for Accessing News



Compared to 2014, TV remains the primary source of news for most nationals, and newspaper readership is declining. The internet is an important news source across the region, especially among the young and more highly educated. Egypt is a notable exception, as consuming news—both on TV and online—dropped significantly among Egyptians in the past two years. This decrease could mean that following news is less critical due to increasing political stability ever since the most recent regime change, in 2013.

Newspaper readership dropped across the region between 2014 and 2016. Overall readership fell seven percentage points (54% vs. 47%), and daily newspaper readership decreased by four percentage points (17% vs. 13%). Reading newspapers in general is most common among Emiratis and Saudis (81% and 66%). Qataris still report the highest rates of daily newspaper readership, despite a significant drop from 2014 (47% in 2014 vs. 32% 2016).

Most national internet users check news online (84%) and four in 10 check news daily. The share of internet users accessing news online daily ranges from 30% in Lebanon and the UAE to 52% in Tunisia. Nationals overall are twice as likely to read news online every day as read newspapers daily (29% vs. 13%).



More men than women read newspapers in all countries, except in Tunisia and the UAE. Newspaper readership declined among both men and women in Lebanon and the Gulf states; readership among Egyptian and Tunisian women remained relatively stable at just over one-third in each country.

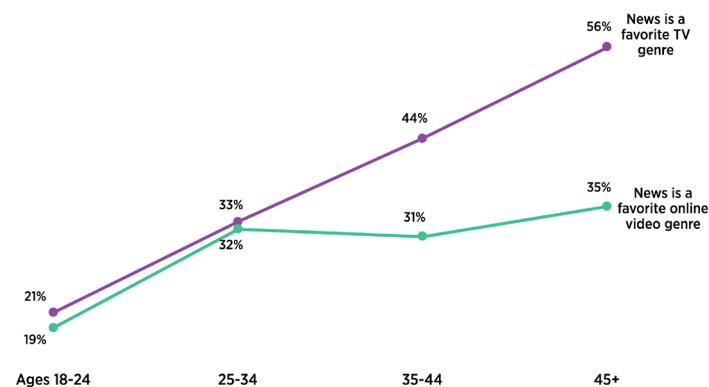
Among internet users, more men than women consume news online. The biggest gender gaps are in Lebanon and Qatar where more men than women read online news by 12 (Lebanon) and 10 (Qatar) percentage points. Egypt is the exception, where approximately 90% of both men and women check news online. Relatively equal portions of men and women read news online daily in Tunisia, Saudi Arabia, and the UAE.

The percentage of internet users checking news online rises from 60% among those with a primary education to 76% for intermediate, 82% for secondary, and up to 88% among the university educated. Similarly, the percentage of people reading newspapers rises from 17% at the primary level to 36% for intermediate, 49% for secondary, and 60% for those with a university or higher education. Reading online news daily is more common than reading newspapers daily, but both increase significantly with a secondary and a university education.



## Digital News Use

Percent of internet users who say news is one of their three favorite genres of TV or online video, by age



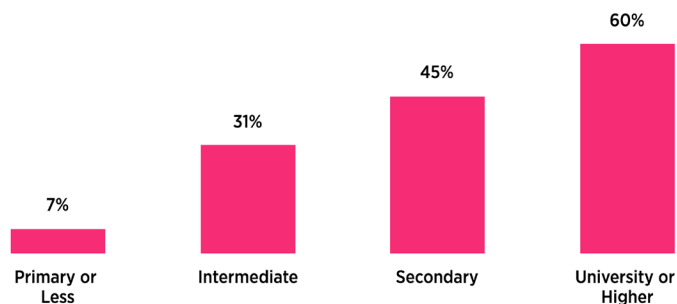
Base: Nationals, internet users; n= 3,384.

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Television is the most common news platform across all nationals (84%), with Qatar the only exception, where online news is preferred over TV (56% online vs. 40% TV). Emiratis are the most diversified news consumers, broadly accessing TV, radio, and online formats (55% TV, 50% radio, 45% online).

Younger adults are more likely than older adults to access news online. Over half of nationals under 35 years old access news online, compared to 20% of those 45 years and older. Most of the oldest nationals (45+) access news on TV, far more than get news from the radio or from the internet (91% TV, 31% radio, 20% internet). One in four respondents 18 to 24 years old accesses news on the radio, only modestly lower than radio news penetration for older respondents.

Percent who accessed news online in the past six months, by education



Base: Nationals only; n=4,529.

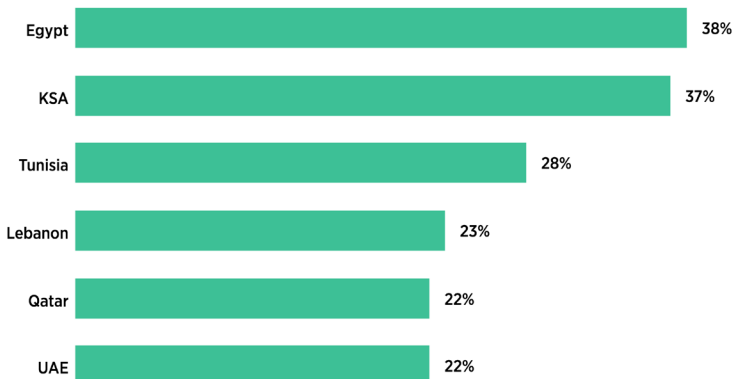
MEDIA USE IN THE MIDDLE EAST, 2016  
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Nationals with at least a university education are over six times as likely as those with a primary education to use the internet for news. While TV is the most common news platform across education groups, watching TV news is most common among those with a primary education and least common among those with a university education or higher (93% vs. 79%).

Nationals who say people benefit from consuming news from other parts of the world are more likely to access news online than those who disagree (47% vs. 36%).

News remains a top-three favorite TV genre among all respondents behind comedy and drama (37% news vs. 56% comedy and 44% drama). The popularity of news changed little across countries, but fell significantly in Egypt (42% in 2014 vs. 32% in 2016).

Percent of internet users who say they sent, shared, posted or commented on news online in the past month



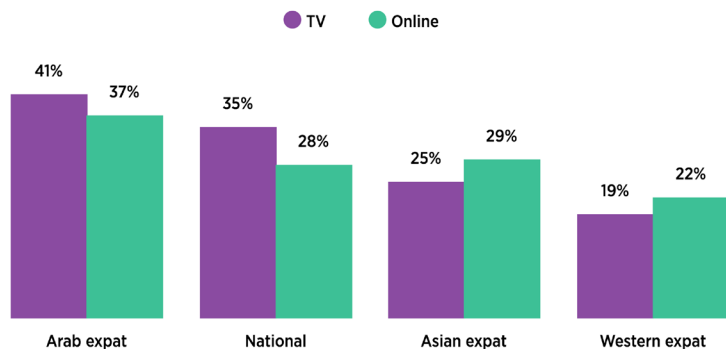
Base: Nationals, internet users; n=3,384.

MEDIA USE IN THE MIDDLE EAST, 2016  
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News is the third most popular online video genre, behind comedy and music videos (28% news vs. 53% comedy and 33% music videos) and is most popular in Tunisia (38%). As with TV news, however, online news dropped as a favorite video genre among Egyptians (41% in 2014 vs. 25% in 2016).

More men than women say news is a favorite video genre, both on TV and online. The exceptions are Saudi Arabia and the UAE, where relatively equal proportions of men and women favor news online (about 30%). The difference between genders is more pronounced for news on TV than online. The difference in proportions of men and women who list news as a favorite genre is 18 percentage points for TV (46% men vs. 28% women), but only eight percentage points for online news (32% men vs. 24% women).

Percent of internet users who say news is one of their three favorite genres of TV or online video, by nationality



Base: All respondents, internet users; n=4,858.

MEDIA USE IN THE MIDDLE EAST, 2016  
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While 37% of all nationals name news as a favorite TV genre, this percentage ranges from 21% to 54% between the youngest (18-24) and oldest (45+) age groups. Internet users 45 years and older are more likely to cite news as a favorite online genre than the 18 to 24 year-olds (35% vs. 19%).

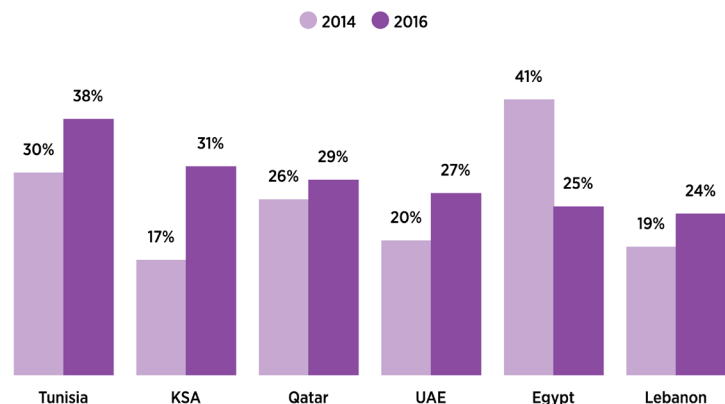
Listing news as a favorite TV genre decreases with education, but preference for online news videos is similar across education levels. Arab nationals and expatriates cite news as a favorite TV and online genre more frequently than do Western and Asian expatriates.

Internet users are generally not interested in paying for any online content, especially news. Only 3% paid for online news in the past year, and only 5% are willing to pay for it. Emiratis are the most likely to have paid for news online (10%).

Three in 10 national internet users send, share, or post about news online. Men and women in most countries are equally likely to discuss news online, except in Lebanon and Qatar, where more men than women discuss news online.

## A Focus on Egypt

Percent of internet users who cite news as one of their top three online video genres:



Base: Nationals, internet users;  
2014 n=2,427; 2016 n=3,384.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Across all countries in this study, the use of TV news is relatively consistent from year to year, and accessing internet news is either stable or increasing; Egypt presents a singular and significant exception. The popularity of TV and online news as favorite genres dropped significantly among Egyptians between 2014 and 2016 (TV: 42% vs. 32%, online: 41% vs. 25%).

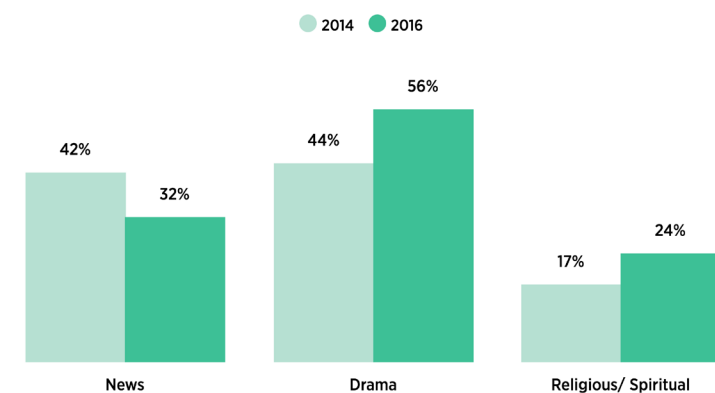
In 2014, data collection in Egypt took place just six months after military strongman Abdel Fattah el-Sisi took power from Mohamed Morsi. Since then, despite a weak economy and several high-profile terrorist attacks, power in Egypt has been stably consolidated by Sisi's regime.

In 2014, 41% percent of Egyptians listed news as a favorite online video genre, compared to 30% of Tunisians, 26% of Qataris, 20% of Emiratis, 19% of Lebanese, and 17% of Saudis. The 16 percentage point drop in 2016 puts Egyptians closer to the proportion of other nationals' naming news as a favorite online video genre: 25% of Egyptians vs. 38% of Tunisians, 31% of Saudis, 29% of Qataris, 27% of Emiratis, and 24% of Lebanese. The same is true for TV, as the proportion of Egyptians citing news as a favorite TV genre regressed to the average in 2016: 32% of Egyptians vs. 49% of Lebanese, 39% of Tunisians, 36% of Qataris, 28% of Emiratis, and 27% of Saudis.

People are more likely to follow news, especially online, during volatile times. A more predictable political situation in Egypt may help explain why Egyptians' interest in news in 2016 aligns more closely with their Arab contemporaries.

Non-news TV and online video genres gained popularity in Egypt between 2014 and 2016. Egyptians now express greater preference for drama, sports, children's programming, music videos, and religious/spiritual programming on TV, and for dramas, religious/spiritual content, comedy, and documentaries among online videos.

Percentage of Egyptians who cite the following as one of their three favorite TV genres:



Base: Egyptian nationals, TV viewers;  
2014 n=953; 2016 n=936.

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# CHILDREN'S MEDIA

Far more of the TV and video content watched by girls is approved by an adult in the home than chosen independently.



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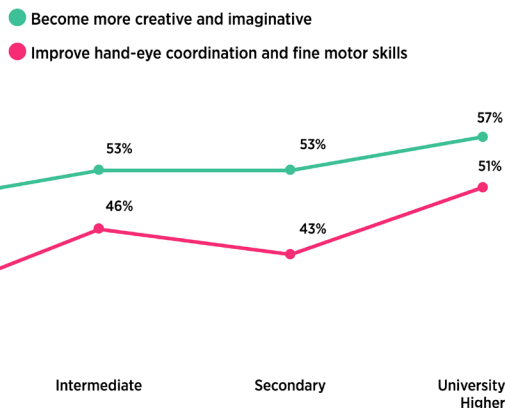
## In this chapter

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- Perceived Effects of Media on Children
- Content Choices
- Sources of Entertainment

## Perceived Effects of Media on Children

People with the following education levels who agree:  
"Entertainment that children in my household are exposed to helps them..."



Base: Nationals, those who live in a household with children; n=1,903.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Entertainment media tend to be viewed as beneficial to children, although some nationals are concerned about the perceived negative impact of entertainment on attitudes, behavior, and development. Fewer nationals in 2016 perceive positive effects of entertainment on children than in 2014.

Less than half of nationals with children in the household feel exposure to entertainment media helps hand-eye coordination (46%), down from 54% in 2014. This decline was seen in the Gulf states (Qatar: 68% in 2014 vs. 56% in 2016, Saudi Arabia: 69% in 2014 vs. 46% in 2016, the UAE: 55% in 2014 vs. 43% in 2016). A sizeable minority believes exposure to entertainment media can contribute to poor health and obesity and can cause a lack of concentration (37% health and obesity and 36% concentration). Qataris continue to be the most concerned that using entertainment media contributes to both issues (poor health and obesity: 66% in 2014 vs. 64% in 2016, lack of concentration: 68% in 2014 vs. 65% in 2016).

Percent of cultural conservatives and progressives who agree that the entertainment children in their household are exposed to...

● Cultural conservatives ● Cultural progressives

Helps them become more creative and imaginative

48%

64%

Helps them become more tolerant of other cultures

52%

61%

Helps them learn skills needed in school

45%

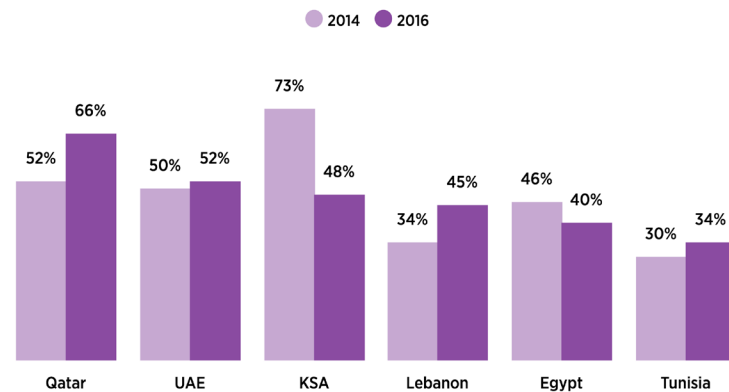
54%

Note: Respondents were asked to choose between culturally conservative and culturally progressive when asked the question: "Compared to most people in your country, how would you describe yourself?"

Base: Nationals, those who live in a household with children; n=1,903.

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Percent who agree that the entertainment children in their household are exposed to: "Helps them get a better sense of their own culture"

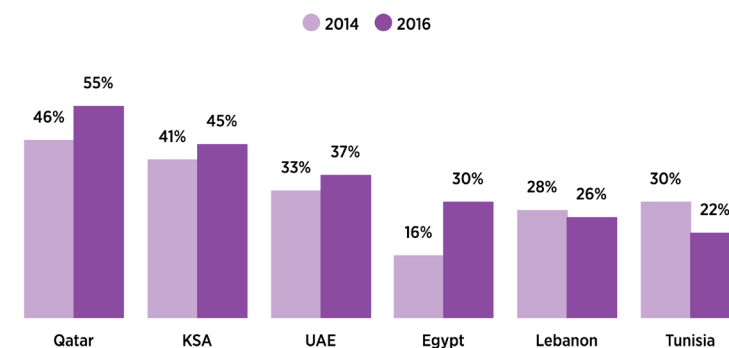


Base: Nationals, those who live in a household with children; 2014 n=2,076 ; 2016 n=1,903.

MEDIA USE IN THE MIDDLE EAST, 2016  
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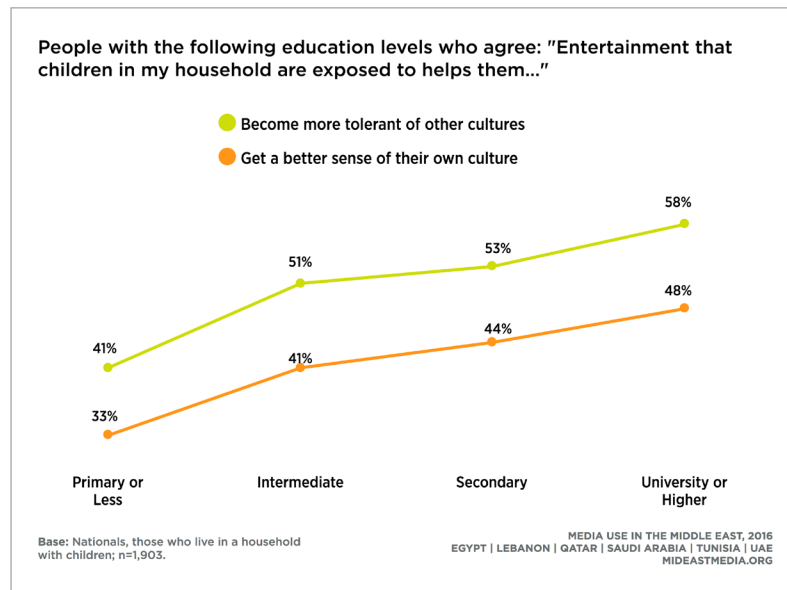
However, respondents also feel entertainment media help children become both more tolerant of other cultures and develop a sense of their own culture. Majorities in most countries, except Tunisia, believe entertainment media promote tolerance, although this view has softened since 2014 (61% in 2014 vs. 54% in 2016). More than four in 10 feel entertainment helps children get a better sense of their own culture, but again, agreement is lower than two years ago (44% in 2016 vs. 49% in 2014). In comparison, one-third feel entertainment leads children to lose a sense of their own culture, similar to 2014 (34% in 2016 vs. 31% in 2014).

Percent who agree that the entertainment children in their household are exposed to: "Causes them to lose a sense of their own culture"



Base: Nationals, those who live in a household with children; 2014 n=2,076 ; 2016 n=1,903.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Among all nationals, Qataris are the most likely to feel entertainment promotes cultural tolerance and a sense of culture among children, and more so in 2016 than in 2014 (tolerance: 77% in 2016 vs. 73% in 2014, sense of culture: 66% in 2016 vs. 52% in 2014). However, Qataris are also concerned about children losing a sense of their *own* culture due to the entertainment they consume (55% in 2016 and 46% in 2014).

Western expatriates are the most likely to believe entertainment media are beneficial to children in their household, while Arab nationals are least likely to believe entertainment has a lasting impact on children, either positive or negative. Half of both Western expatriates and Asian expatriates in the region worry children in their households lose a sense of their culture due to entertainment they consume (55% and 51%), compared with one-third of nationals and Arab expatriates (34% and 33%).

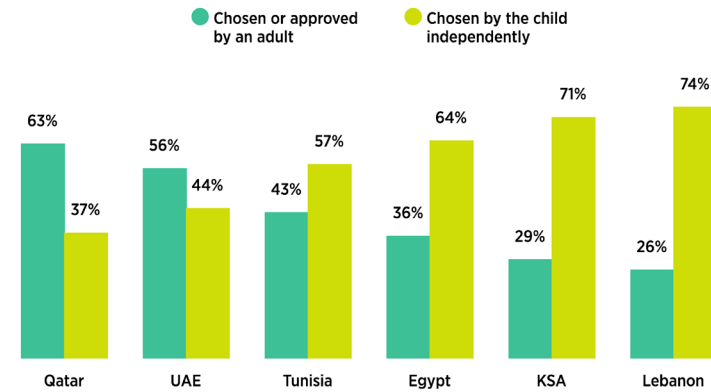
Those who describe themselves as culturally progressive are more likely than conservatives to say children's entertainment has prosocial effects, in particular regarding creativity and imagination, tolerance of other cultures, and preparedness for school (creativity and imagination: 64% vs. 48%, tolerance of other cultures: 61% vs. 52%, preparedness for school: 54% vs. 45%).

Perceptions of positive effects of entertainment on children increase with education, in particular with regard to learning tolerance of other cultures, strengthening a sense of one's culture, and inspiring creativity and imagination.



## Content Choices

Percent of TV or video content consumed by 15 to 17 year-olds that is...



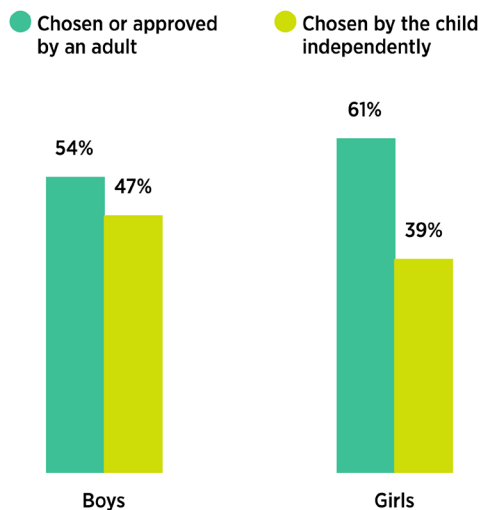
Note: Data provided by adult respondents who live in a household with children.  
 Base: Nationals, those who live in a household with a 15 to 17 year-old child; n=487.

MEDIA USE IN THE MIDDLE EAST, 2016  
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Recognizing that adults might not be aware of all the entertainment choices children make in their homes, agency in choosing children's entertainment shifts with the age of the child. When children are very young (0-6), the parents or other adults make most of the choices for the child (75% vs. 25% chosen by child). Older teenagers (15-17), on the other hand, are more likely to make their own entertainment choices (60% vs. 40% adult chooses or approves).

Regardless of age, a higher percentage of TV/video content is, according to adult respondents, chosen or approved by an adult for girls than for boys, by an average of seven percentage points (61% vs. 54% for boys).

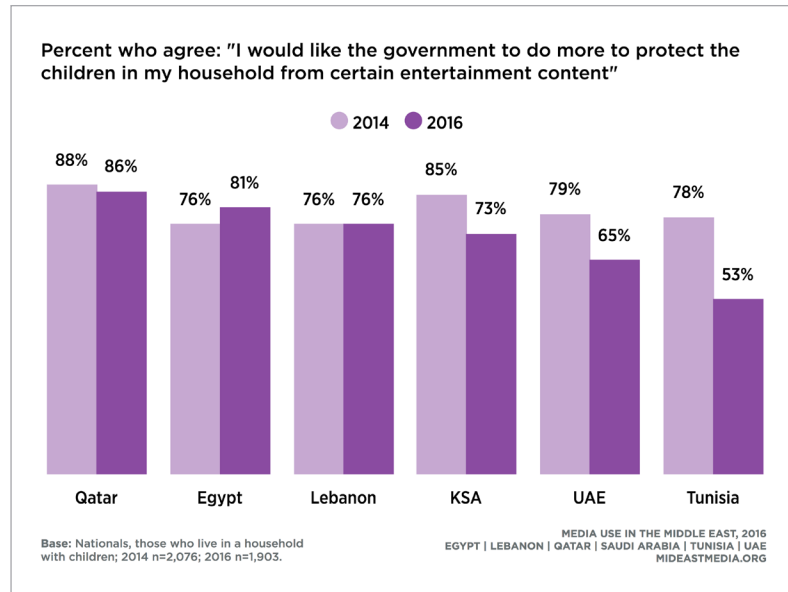
Percent of TV or video content consumed by children that is...



Base: Nationals, those who live in a household with children; n=1,903.

MEDIA USE IN THE MIDDLE EAST, 2016  
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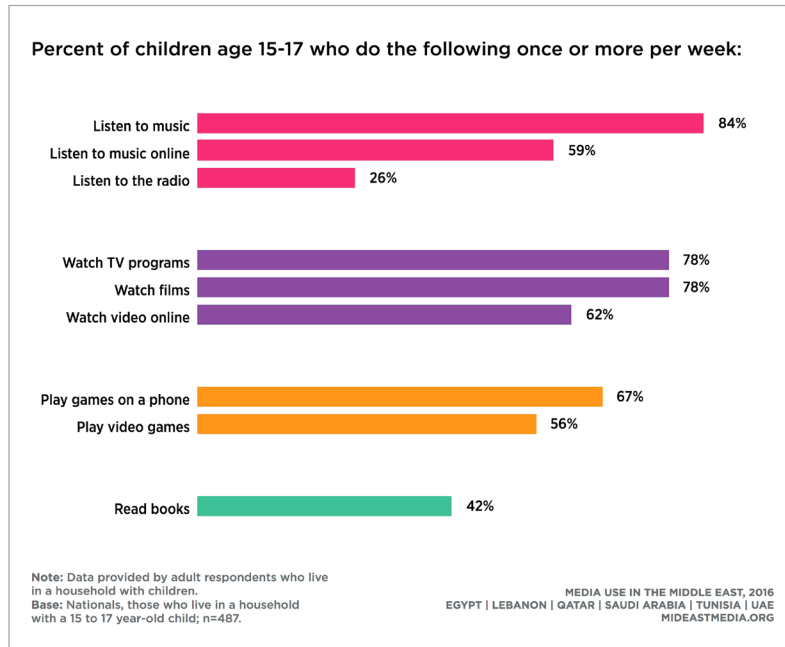




Overall, more adults in Qatar say they or other adults in the home make entertainment decisions for the children (69%), while Saudi Arabia is the only country where children are more likely than adults to make their own entertainment choices (53%).

Three-fourths of adults want the government to do more to protect children from certain content, down from 2014 (73% in 2016 vs. 80% in 2014). Support ranges from a high of 86% in Qatar to a low of 53% in Tunisia.

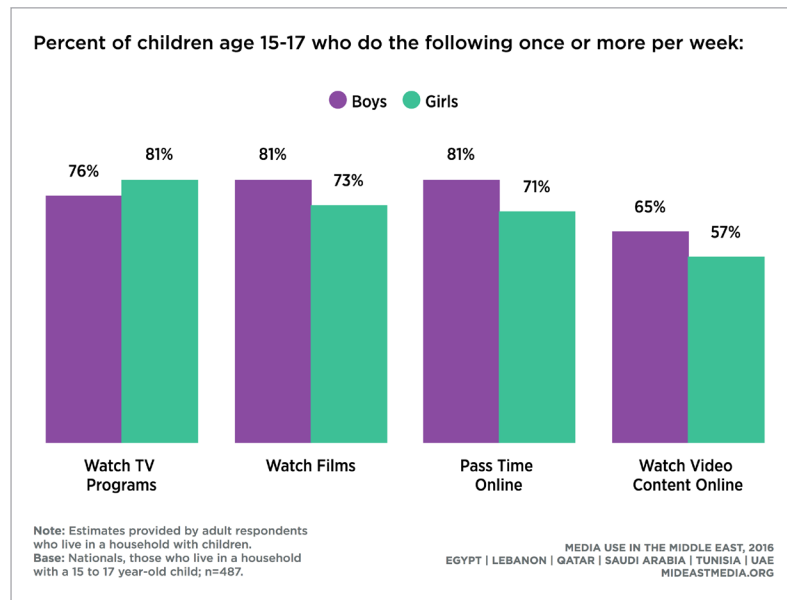
## Sources of Entertainment



In addition to exploring the entertainment habits of adults in the Arab region, the NU-Q survey also examined entertainment habits of children. Findings reported here were provided by adults with at least one child living in their household.

The most popular entertainment media for children are similar to those for adults: watching TV, watching films, and listening to music. These are the top three forms of entertainment for children regardless of age. Other entertainment media that children use, and the frequency with which they use them, varies with age.

The range of activities of the youngest age group (0-6) is more limited than that of older children. Around half watch TV, films, and listen to music at least weekly (58% TV, 45% films, 49% music), and 45% of 0 to 6 year-olds play games on a phone at least once a week. Use of other media for entertainment at least weekly drops sharply among this age group. The 0 to 6 age group is less likely than older respondents to use the internet generally, watch video content online, play games on a phone, and read books (or have books read to them).



Slightly older children use more varied entertainment media. Nearly eight in 10 7 to 11 year-olds watch TV weekly (79%) and 61% do so daily. Six in 10 or more play games on a phone (69%), listen to music (66%), watch films (66%), play video games (63%), and pass time online (62%) at least once a week.

About three-fourths of early teens (12-14) watch TV (77%), listen to music (76%), watch films (73%), and spend time online (71%) once a week or more. They are more likely than younger children to stream music online—half do so at least weekly.

Music and the internet play large roles in the entertainment diets of older teens (15-17). More than eight in 10 listen to music weekly (84%, 54% daily) and 59% listen to music online weekly. Three-fourths pass time online weekly (77%, 61% daily), and 62% watch online videos weekly, frequencies greater than those for younger children.

Seventeen percent of 0 to 6 year-olds spend time online every day, which rises to 40% among 7 to 11 year-olds, 47% among 12 to 14 year-olds, and 61% among 15 to 17 year-olds.



# FOCUS ON QATAR

**Qataris are as likely to use social media as other nationals, but are by far the least likely to post or share content.**



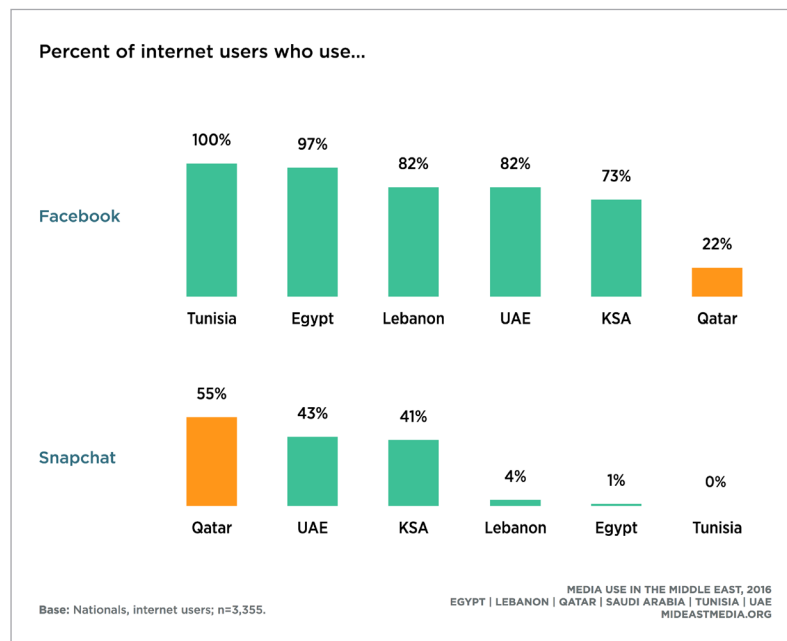
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## **In this chapter**

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- Social Media Trends
- News and Entertainment
- Cultural Attitudes and Language

## Social Media Trends

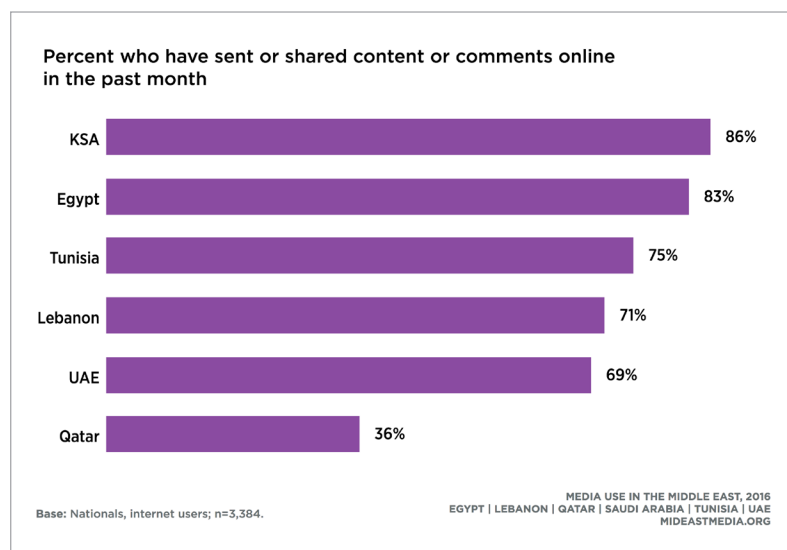


Social media use among Qataris has shifted since 2013. While Facebook penetration declined since 2013 (47% in 2013 vs. 22% 2016), Instagram's reach is increasing (34% in 2013 vs. 60% 2016). Only one in five Qataris use Facebook, fewer than any other national group; this Facebook penetration rate is well below the second-lowest Facebook usage rate, found in Saudi Arabia, at 73%. This low Facebook engagement is unique to Qatar. However, majorities of Arab, Asian, and Western expatriates in Qatar use Facebook (67% Arab expatriates, 70% Asian expatriates, 60% Western expatriates). Instead, Qataris are far more likely to use Snapchat than Facebook. Fifty-five percent of Qataris use Snapchat, the highest Snapchat penetration rate across all countries surveyed.

Qataris' social media habits are not generally consistent with patterns of social media use among other nationals. Among Qatari Facebook users, for example, 57% use the platform daily, compared to 95% for other national Facebook users in the study. In addition, less than half of Qatari Facebook users rely on the service to communicate with specific individuals (43%), fewer than Facebook-using nationals in the other countries except Lebanon, where even fewer use Facebook for communication (38%).

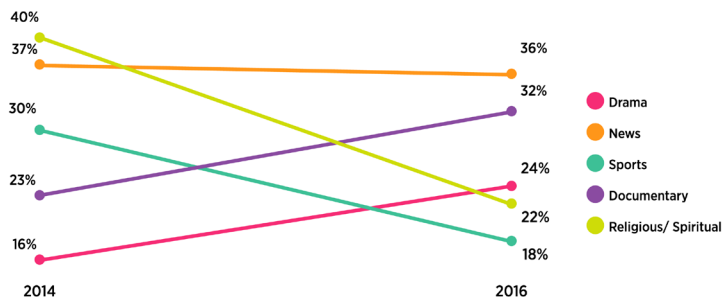
Qatari internet users are much less likely than other nationals to say privacy concerns led them to change how they use social media (46% Qataris vs. 70% other nationals).

Qataris are also the least likely nationals surveyed to share—specifically send or post—online content. Only 36% have done so in the last month, whereas seven in 10 or more nationals in other countries report sharing online recently.



## News and Entertainment

Percent of Qataris who cite the following as one of their three favorite TV genres:



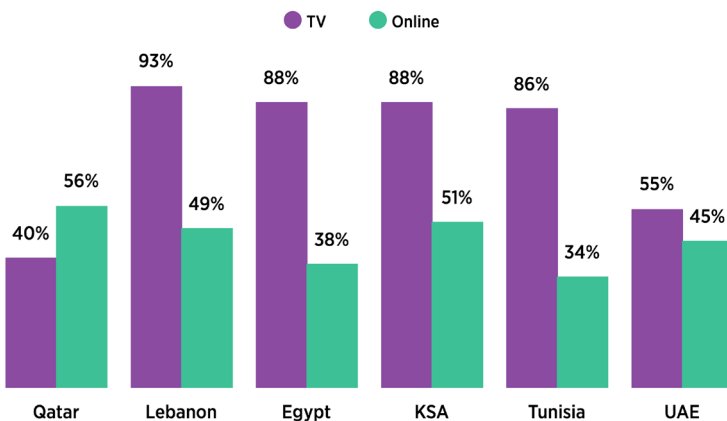
Base: Qatari nationals, those who watch TV; 2014 n=377; 2016 n=336.

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Qataris access news more than nationals in most of the other countries surveyed. More Qataris list news as one of their favorite TV genres (36%) than any other type of programming. Lebanon is the only other country where news is also listed most often as a top-three preferred TV genre (49%). The next most popular TV genres among Qataris are documentary, drama, comedy, and religion (32% documentary, 24% drama, 22% comedy, 22% religion). Fewer than one in five nationals in Qatar, forthcoming host of the 2022 World Cup, say sports is one of their favorite TV genres (18%).

On social media, Qataris also focus on news more than nationals in other Arab countries. Among Qatari Facebook users, one-third use the platform for finding and sharing news—nearly three times higher than the average of other Facebook-active nationals in the region (12%).

Percent of nationals who access news on TV and online



Base: Nationals only; n=4,529.

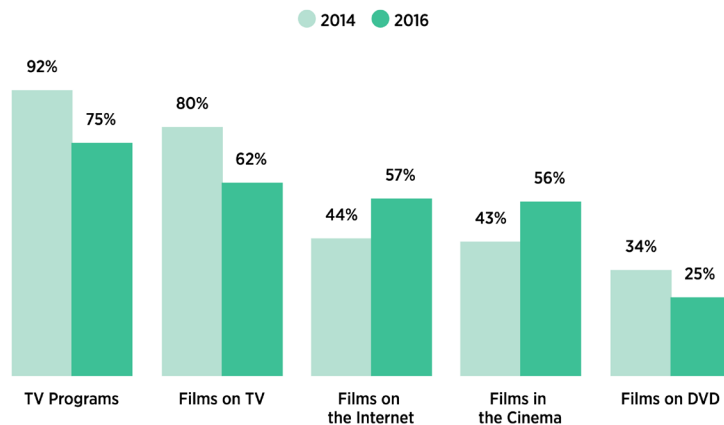
MEDIA USE IN THE MIDDLE EAST, 2016  
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Qataris estimate that 49% of the videos they view online are for news and information purposes and 46% are for pure entertainment, making them the only nationals surveyed who consume a greater percentage of news/information videos than entertainment videos online.

While Qataris are as likely as other nationals to enjoy watching sports on TV/digitally, they are less likely than the rest of the region to enjoy attending professional sporting events in person (enjoy watching on a screen: 49% Qataris vs. 50% other nationals, enjoy watching in-person: 42% Qataris vs. 49% other nationals).

When asked about their preference to watch sports on a screen or attend in person, four in 10 Qataris did not respond one way or the other, an ambivalence greater than in other countries (40% Qataris vs. 25% other nationals). More expatriates in Qatar would prefer to attend a professional sporting event than native Qataris (57% Western expatriates, 55% Asian expatriates, 47% Arab expatriates vs. 29% Qataris).

Percent of Qataris who watched the following in 2014 and 2016:



Base: Qatari Nationals only; 2014 n=407; 2016 n=504.

MEDIA USE IN THE MIDDLE EAST, 2016  
EGYPT | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
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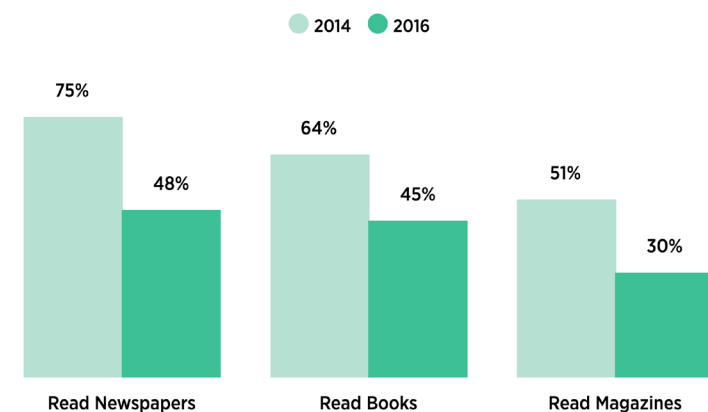
Qataris consume less entertainment media than nationals in the other five countries surveyed; they are the least likely to watch TV programs, films on TV, or any online video, less likely to listen to music in general or online, and play games on a phone (TV programs: 75% Qataris vs. 96% other nationals, films on TV: 62% vs. 92%, online video: 80% vs. 91%, music in general: 55% vs. 87%, music online: 59% vs. 80%, phone games: 37% vs. 61%).

Additionally, Qataris are trending away from certain entertainment media. As of 2016, fewer Qataris watch films both on TV and on DVD. Compared to 2014, fewer Qataris in 2016 report watching TV programs, and fewer Qataris read books, newspapers, and magazines. However, significantly more Qataris watch films in the cinema and are behind only Emiratis in moviegoing rates.

Qataris' preferences for film genres differ from nationals in other countries. Notably, fewer Qataris than other nationals list comedy, drama, and Arab classics among their top three film genres (comedy: 43% Qataris vs. 63% other nationals, drama: 25% vs. 50%, Arab classics: 5% vs. 28%). More Qataris than other nationals prefer horror/thriller films (36% vs. 25%).

While Qataris are similar to other nationals in their preference for reality shows as a favorite TV genre (12% Qataris vs. 16% other nationals), only 3% of Qataris have voted for a reality show contestant in the past two years, the lowest share of nationals in all countries (12% all other nationals). Qatar is also the only country where nationals are more likely to watch TV content at a time other than when it is broadcast (46% Qataris vs. 30% other nationals).

Percent of Qataris who read printed media



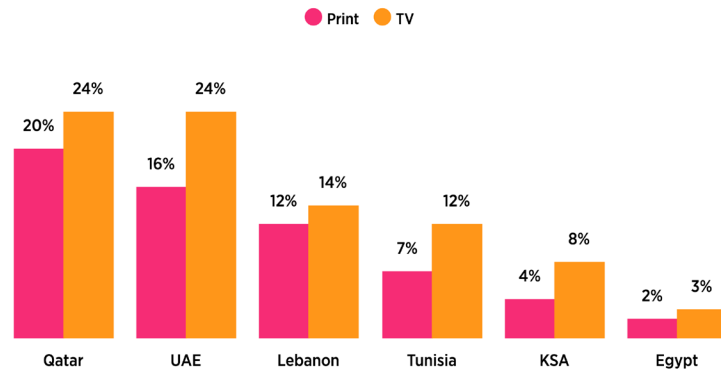
Base: Qatari nationals only; n=504.

MEDIA USE IN THE MIDDLE EAST, 2016  
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## Cultural Attitudes and Language

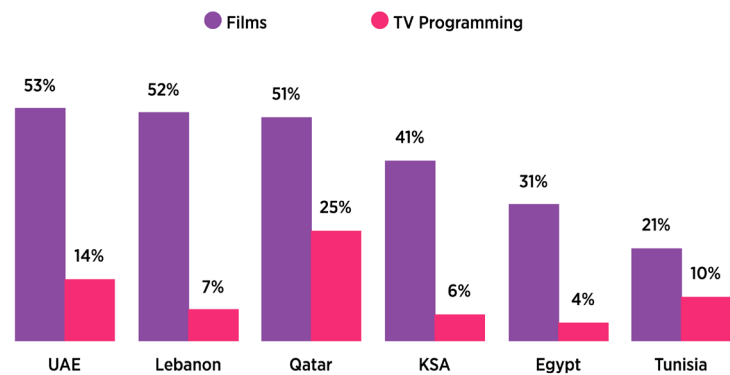
Percent who consume print material and TV programs in English



Fewer Qataris than other nationals see conflict between cultural preservation and embracing modernity. Three in 10 Qataris say it is not possible to preserve cultural traditions and integrate with modern society simultaneously, similar to the view of Tunisians (31% each), but different from Egyptians and Saudis, who are far more likely to find this integration impossible (58% and 52%). Eight in 10 Qataris want their culture to do more to integrate with modern society, more than other nationals in the region (64% other nationals). Still, most Qataris want more done to preserve cultural traditions (81%), though this figure declined from 94% in 2014.

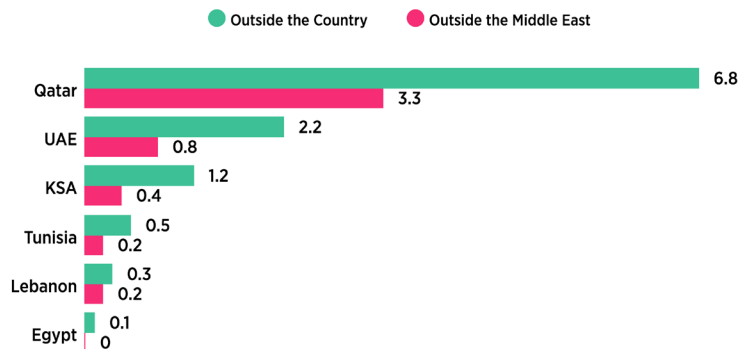
Consuming English-language programming is more common among Qataris who watch TV than their counterparts in the other five countries (32% vs. 10%). Similarly, more Qataris read print materials such as books, newspapers, and magazines in English than other nationals (31% vs. 12%). At least four in 10 Qataris who use the following media access them in English: films, music, and the internet generally (51% films, 39% music, 41% internet).

Percent who watch films or TV programs from the U.S.





### Number of times people say they traveled in the past three years (average)

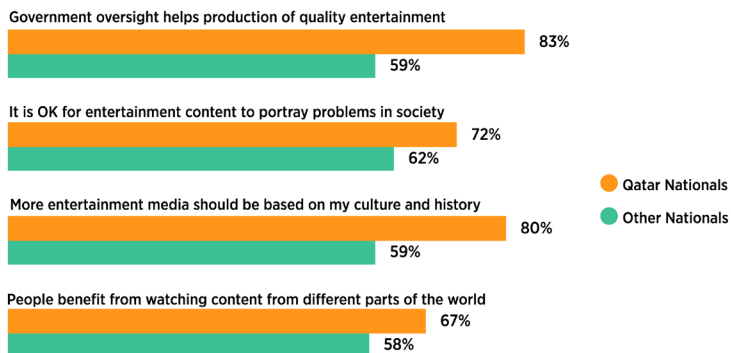


Base: Nationals only; n=4,529.

MEDIA USE IN THE MIDDLE EAST, 2016  
EGYPT | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
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Qataris travel outside their country far more than nationals of other Arab countries, including Emiratis and Saudis. Nearly half of Qataris have traveled abroad in the last three years, compared to just one in 10 of other nationals—an average that includes highly mobile Emiratis. Qataris have also taken an average of five trips outside their country in the last three years, compared to only two trips for other nationals. Perhaps partly as a result, most Qataris acknowledge benefits of watching content from different parts of the world (67%), similar to the sentiments of Emiratis, but more widespread agreement than demonstrated by nationals from other countries. Still, most Qataris also agree that more entertainment should be based on their own culture and history, and more Qataris agree with this than other nationals (80% vs. 59%).

### Percent who agree with the following statements:

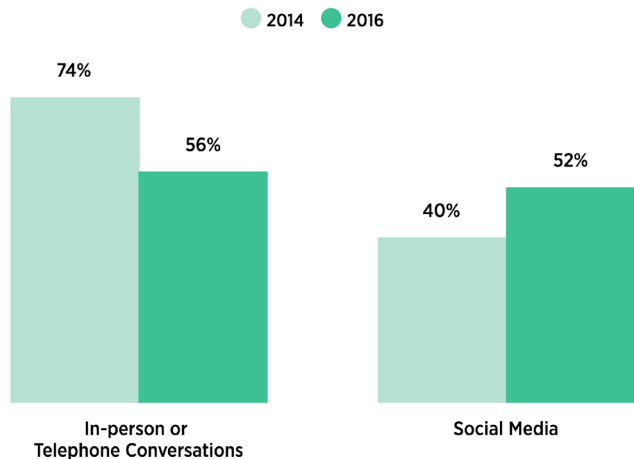


Base: Nationals only; Qatari nationals, n=504; other nationals, n=4,025.

MEDIA USE IN THE MIDDLE EAST, 2016  
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More Qataris consume TV and films from the U.S. than other Arab nationals. Sixty-three percent of Qataris watch films and one-third watch TV programs from the U.S., figures higher than other nationals in the survey. This represents an increase in use of U.S. entertainment content among Qataris since 2014 (film: 54% in 2014 vs. 63% in 2016, TV: 25% in 2014 vs. 34% in 2016). Perhaps as a result, the percentage of Qataris who say U.S. films and TV are harmful to morality dropped between 2014 and 2016 (56% vs. 24%).

Percent of Qataris who say their entertainment choices are influenced by...



Base: Qatari nationals only;  
2014 n=407; 2016 n=504.

MEDIA USE IN THE MIDDLE EAST, 2016  
EGYPT | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
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Influences on Qataris' entertainment choices have changed since 2014. Fewer Qataris rely on in-person or phone conversations to make entertainment choices, while more say social media, user and critics' reviews, and advertising influence their decisions.

More Qataris than other nationals with children in the household believe government should do more to protect children from objectionable content (86% vs. 72%). Among adults with children in the home, more Qataris than others report that children's entertainment choices are more often made or approved by an adult as opposed to decided independently by the children.



## Appendix A: METHOD

### Cite this Study

APA: Dennis, E. E., Martin, J. D., & Wood, R. (2016). *Media use in the Middle East, 2016: A six-nation survey*. Northwestern University in Qatar. Retrieved from [www.mideastmedia.org/survey/2016](http://www.mideastmedia.org/survey/2016).

MLA: Dennis, Everette E., Justin D. Martin, and Robb Wood. *Media Use in the Middle East, 2016: A Six-Nation Survey*. Northwestern University in Qatar, 2016. Web. <[www.mideastmedia.org/survey/2016](http://www.mideastmedia.org/survey/2016)>.

Chicago: Dennis, Everette E., Justin D. Martin, and Robb Wood. "Media Use in the Middle East, 2016: A Six-Nation Survey." *Northwestern University in Qatar*. 2016. <http://mideastmedia.org/survey/2016>.

Results of *Media Use in the Middle East, 2016*, by Northwestern University in Qatar in partnership with Doha Film Institute, are based on N=6,058 face-to-face and telephone interviews across six countries, conducted under direction of the *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 United Arab Emirates. All fieldwork was conducted between December 20, 2015 and February 27, 2016. This is the fourth wave of the *Media Use in the Middle East* survey. The 2016 survey replicated many of the questions included in the 2014 survey and some questions included in the 2013 and 2015 surveys; longitudinal comparisons are provided when applicable. The 2016 and prior iterations of the survey are available at [www.mideastmedia.org](http://www.mideastmedia.org).

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 all countries. For face-to-face interviews, this approach is designed to produce samples representative of the population of residents in legal households in the surveyed areas. An overall master sample design was applied in these countries. Each country is comprised of governorates or provinces, which were divided into cities, towns and villages. These were further divided into administrative units or sectors, and then into clusters, each comprised of several blocks. A block was defined as the PSU (Primary Sampling Unit). In each block a starting point was randomly selected and interviewers followed a pre-defined random path through the block. In Qatar, where telephone interviews were employed, prior to extracting a sample for the survey the records are reshuffled to keep all numbers in random sequence within each stratum, and a special extraction program is used to select phone numbers at regular intervals within the structured list. A multi-stage random probability selection of telephone numbers from the tele-database is thus performed that yields a representative sample for the interviews.

Sampling procedures varied somewhat by country, but the method was designed to ensure national representation of the adult population in each country. The samples in Qatar, Saudi Arabia, Tunisia and the UAE include citizens and expatriates. The samples in Egypt and Lebanon include just citizens due to the small number of expatriates in these countries. 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 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.

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

A summary of completed interviews and response rates by country for 2014 and 2016 is as follows:

COUNTRY	COMPLETED INTERVIEWS		RESPONSE RATE %		COMPLETED INTERVIEWS BY NATIONALITY		
	2014	2016	2014	2016		2014	2016
Egypt	1,002	1,000	48%	46%	Nationals	1,002	1,000
					Non-nationals	-	-
Lebanon	1,000	1,008	50%	49%	Nationals	1,000	1,008
					Non-nationals	-	-
Qatar	1,003	1000	52%	44%	Nationals	407	504
					Non-nationals	596	496
Saudi Arabia	1,009	1,017	78%	77%	Nationals	622	616
					Non-nationals	387	401
Tunisia	1,016	1,016	86%	89%	Nationals	906	913
					Non-nationals	110	103
United Arab Emirates	1,005	1,017	82%	70%	Nationals	234	488
					Non-nationals	771	529
Total	6,035	6,058					

Rim weighting was applied in all countries surveyed to bring the data in line with the population in each country. Rim weighting uses a mathematical algorithm to help provide an even distribution of results across the entire dataset while balancing certain characteristics to pre-determined totals. It weights the specified characteristics simultaneously and disturbs each variable as little as possible. The weighting factors include gender and age by nationality and gender by nationality.

While data *within* countries were weighted to be representative, the overall sample of 6,058 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 method in each of the participating countries are provided below. The descriptions show margin 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 a particular finding falls within plus or minus the reported margin of error.

## Total Sample

- **Sample size:** 6,058
- **Gender split:** 52% male, 48% female
- **Mean age:** 36 years old

## Egypt

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages offered:** Arabic, English
- **Fieldwork dates:** December 28, 2015 – January 18, 2016
- **Sample size:** 1,000
- **Gender split:** 50% male, 50% female
- **Mean age:** 37 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

## Lebanon

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages offered:** Arabic, English, French
- **Fieldwork dates:** December 30, 2015 – January 28, 2016
- **Sample size:** 1,008
- **Gender split:** 49% male, 51% 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, 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 offered:** Arabic, English
- **Fieldwork dates:** January 10 – February 10, 2016
- **Sample size:** 1,000
- **Gender split:** 56% male, 44% 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 offered:** Arabic, English
- **Fieldwork dates:** December 20, 2015 – February 27, 2016
- **Sample size:** 1,017
- **Gender split:** 53% male, 47% female
- **Mean age:** 33 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

## Tunisia

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus
- **Languages offered:** Arabic, English, French
- **Fieldwork dates:** January 2 – February 1, 2016
- **Sample size:** 1,016
- **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 offered:** Arabic, English
- **Fieldwork dates:** January 1 – January 31, 2016
- **Sample size:** 1,017
- **Gender split:** 53% male, 47% female
- **Mean age:** 34 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

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*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 method, sample and weighting can be found at  
[www.mideastmedia.org/survey/2016](http://www.mideastmedia.org/survey/2016).*

*In agreement with Qatar's Supreme Council of Health, The Georgetown University School of Foreign Service in Qatar is currently acting as Central I.R.B. for social-behavioral research conducted by universities in Qatar, and can be contacted at +974-4457-8472. Northwestern University in Qatar's protocol approved by the Georgetown I.R.B. is #2014-0870.*

## 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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