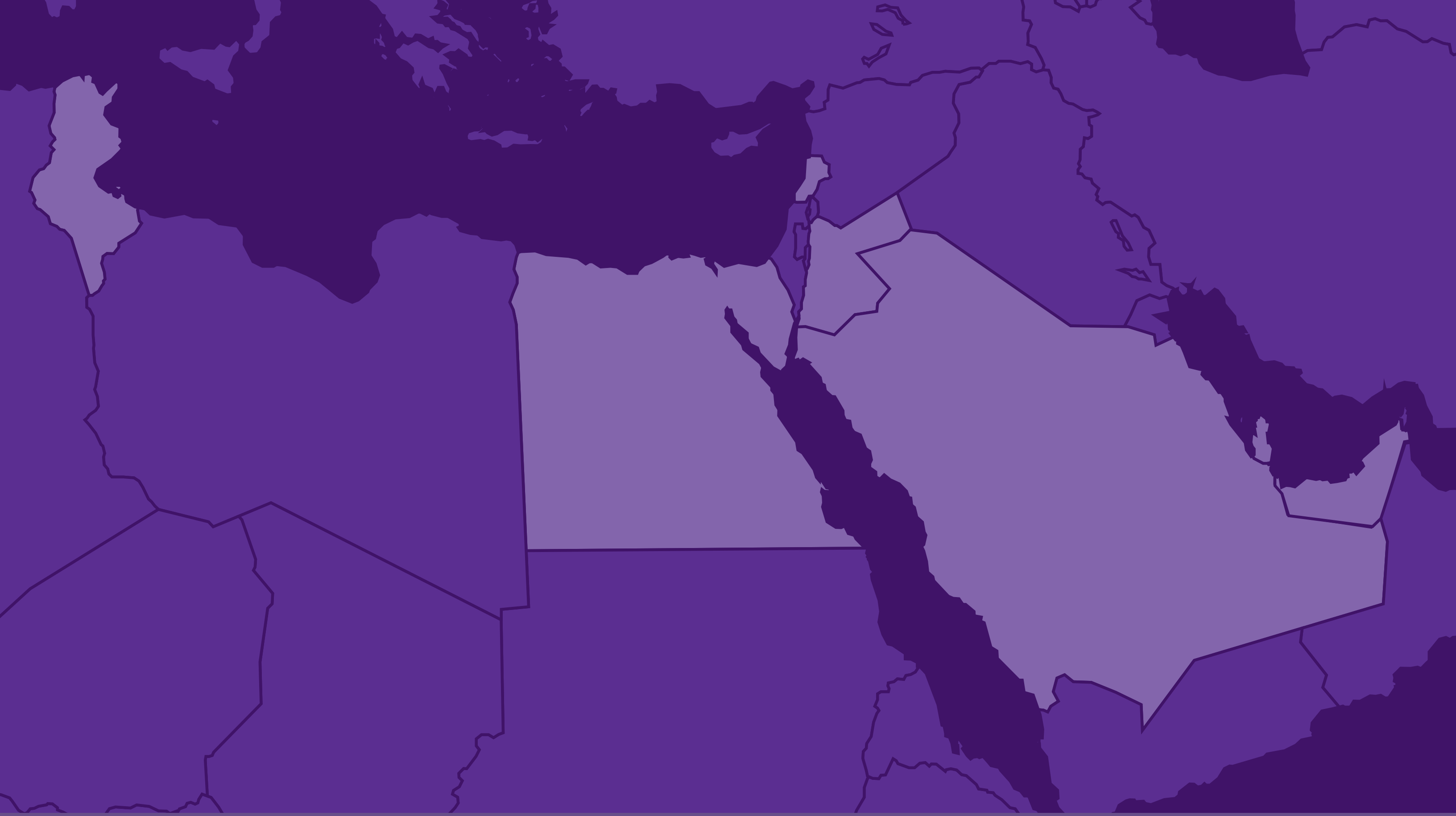

MEDIA USE IN THE MIDDLE EAST 2017

A Seven-Nation Survey

NORTHWESTERN
UNIVERSITY
IN QATAR

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

MEDIA USE IN THE MIDDLE EAST 2017

A Seven-Nation Survey

Conducted by:

Northwestern University in Qatar

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

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 customized exploration of the data, at

mideastmedia.org

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FOREWORD

For the fifth consecutive year, Northwestern University in Qatar publishes a report that takes stock of media use in a sizable number of Arab countries, this year seven. Our survey also calibrates again the state of freedom of expression and other aspects of the media's interplay with society and culture. This study is the only one of its kind in the region and one of a few such longitudinal public opinion projects in the world. It offers extensive and valuable intelligence about the media that people adopt, use, and prefer as well as their attitudes and opinions about the role, impact, and importance of mediated communication in their lives and the lives of others across the Middle East region. Since 2013, we have tracked:

- Media use by platform, comparing traditional and digital outlets;
- News consumption and preference patterns for specific sources of news and information;
- Internet use patterns and their consequences—with an emphasis on the rise and interplay of social media;
- The relevance of mobile media; as well as
- Perceptions of and opinions about free speech, online privacy, and bias and credibility across media types.

At its inception, and continuing to the present, *Media Use in the Middle East* has been an effort to better understand the evolving and transformative media and communication platforms that not only link the people within the Middle East region but also connect them with the global community. From the get-go, we have provided our data to the expansive *World Internet Project* at the University of Southern California's Annenberg School for Communication, which regularly assesses the use of media and communication in more than 20 countries.

After investigating eight countries in the first survey, in 2014 we settled on six representative nation states that together best reflect the pulse of the MENA region. From 2013 through 2016, we included Egypt because of its importance not only as the largest country in the region but also because of its contrast as a relatively media-poor society compared with the wealthier, more media-rich countries of the Gulf region. This year, we initially were unable to clear bureaucratic hurdles in Egypt. We substituted it with Jordan—one of our original eight countries in 2013. Subsequently, however, we did get permission to conduct our research in Egypt, but too late to include in our cross-country analysis. We have presented this data in its own chapter in this report.

Our survey is rigorous, drawing on interviews with over 7,000 subjects. Samples are drawn to reflect the different regions and often ethnicities of the countries studied. But the study is also conducted with dispatch during the same academic year. It involves negotiations with seven different countries. It intentionally includes interviews with citizens and resident nationals as well as expatriates—very significant in the Middle East where expats often greatly outnumber citizens. Interviews are conducted in Arabic, English, and French.

So, what have we learned in five years of probing use of and opinions about media and communication in the region? Just after the Arab Spring in 2011 and 2012, we began searching out the nuances of what audiences do and what they think in a dynamic and disruptive environment. Baselines were established for the role of traditional media such as television, newspapers, magazines, and film as well as for the fruits of the digital revolution—social media and mobile media. In crafting our portrait, in odd years (2013, 2015, and 2017) we focused on news and information. In even years (2014, 2016) we looked more closely at entertainment media. Thus, we capture the multiple functionality of media to inform, persuade, entertain, and provide a marketplace for goods and services. In 2015, we also conducted a major companion study, *Media Industries in the Middle East*. For the first time, it offered extensive insights into the "supply side" of what audiences in MENA use and prefer—the institutions that create, produce, and disseminate messages.

Not surprisingly, the findings which follow in these pages report a rise in internet penetration in every country in the region with Saudi Arabia, the United Arab Emirates, and Qatar reaching near saturation levels between 91 and 99% while Lebanon, Jordan, and Tunisia—which had lagged—reveal impressive gains. Across the region, legacy media (TV, radio, and newspapers) remain important but saw declines in their use.

The relative volatility of social media seems to reflect both fads in use as well as the differing personalities of each of these distinctive and idiosyncratic platforms. Social media platforms were once dominated by Facebook. It had claimed 90% penetration among internet users in 2013 but is now down to 74%. Even Twitter fell from 47% to 24%. Their rival, WhatsApp, however, maintains its prominence having started with 77% in 2015, the year it first appeared, and remaining at 80% in 2017. Instagram, on the other hand, grew from 6% to 39% penetration among internet users.

Interestingly, the digital revolution with its interactive and addressable capacity has not led to instantaneous or overwhelming support for freedom of expression. Tolerance for speech that criticizes government policies is robust only in Lebanon and Tunisia (66% and 48%, respectively). Among Qataris and Emiratis, supporting such free speech registers as low as 21% and 14%, respectively. Similarly, tolerance for speech offending one's religion is low as most nationals feel the government should be able to prevent such speech—the highest rate in Lebanon (89%) and the lowest rate in Tunisia (69%).

These results suggest that while social media may provide an avenue for more freedom of expression, many remain reluctant to fully embrace that opportunity. A siege mentality may, in part, explain this hesitation: increasingly more Middle Eastern nationals (except in Saudi Arabia) express the perception that international news outlets are biased against the Arab world—a shift from the earlier days of our study when opinions about the news coverage of the Arab world were more sanguine. Still, it should be mentioned that seeds of the Arab Spring are evident in social media use, disputing claims that its imprint is long gone and forgotten.

Once again, our study reinforces the value of longitudinal research. Even small gains or losses in media attention can significantly impact a competitive marketplace. In the last five years, our analyses, published as monographs and online in an interactive website, have gained currency in the region and internationally. They are used and cited by scholars and journalists as well as media entrepreneurs. Each year's report is a gift that keeps on giving—not just in the attention it receives on release but in continuous references in media reports, marketing analyses, and even public speeches by regional leaders. Our findings appear in an impressive number of academic citations.

This use and utility of our study are gratifying and prove its worth—not only in providing useful and practical information for professionals and citizens alike, but also for igniting a continuing conversation about media, press freedom, censorship, and other topics. Our study also takes measure of how policies and practices differ across the seven countries we investigate—and what that means in public policy. For example, draconian cybercrime laws criminalizing some forms of expression on the internet were introduced by those countries whose low tolerance levels were reported earlier in our study.

This signature institutional project of Northwestern University in Qatar reinforces our belief that careful assessment and calibration year by year can produce the kind of intelligence necessary for media scholars, producers, and users themselves. As always, we welcome feedback and interaction helping us strengthen and improve our continuing work.

As Dean at NU-Q, I have had the privilege of launching these studies—of course, relying on gifted and talented colleagues and collaborators to carry them out. Co-authors Justin D. Martin, Robb Barton Wood, and Marium Saeed deserve credit for much of what appears in these pages. We also value the advice, counsel, and critique of Klaus Schoenbach, Senior Associate Dean at NU-Q. Fieldwork was expertly carried out by The Nielsen Company and Harris Poll, with special thanks to David Krane and Kerry Hill, among others, including Adam Gross and Elizabeth Sklar. I also thank Humphrey Taylor, who worked on this study in the beginning and whose expertise helped launched it. Special thanks also to Jeffrey Cole, Director and CEO of the *World Internet Project*, whose friendship, support, and annual visits are greatly valued.

Funding for this study comes in part from a grant from the Qatar National Research Fund with additional support from Doha Film Institute and Northwestern University in Qatar. Our gratitude extends to all who support this longitudinal study—their annual and continued funding for such an enterprise.

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

Cite this Study:

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EXECUTIVE SUMMARY

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

Media Use by Platform

- Compared to five years ago, internet penetration rose in all six countries surveyed and most dramatically in Jordan, Lebanon, and Tunisia.
- Smartphone ownership tracks closely with internet use in the six surveyed countries. Nearly all nationals in Lebanon, Qatar, Saudi Arabia, and the UAE own a smartphone compared with 83% of Jordanians and 65% of Tunisians.
- Use of Arabic online has increased proportionally with the increase in internet users. In comparison, use of the internet in English remains essentially flat, 25% in 2013 and 28% in 2017, despite the increase in internet use.
- As internet penetration rises, nationals are less likely to be using *offline* media platforms compared with 2013. Most nationals still watch TV, but the rate declined modestly since 2013 (98% in 2013 vs. 93% in 2017). Rates of newspaper readership, however, declined more sharply from 47% in 2013 to 25% in 2017. Radio and magazines also declined in popularity since 2013 (radio: 59% in 2013 vs. 49% in 2017; magazines: 26% in 2013 vs. 19% in 2017).

News Consumption

- Digital news consumption across the Arab region is high and growing. Over three-quarters of nationals get news on their phones and two-thirds do so at least once a day (77% at all, 67% daily). Using smartphones for daily news checks is second only to accessing news on TV (78% TV).
- In Jordan, Lebanon, and Tunisia, nationals get news more frequently from TV than online sources, while larger proportions of Qataris, Saudis, and Emiratis turn to the internet more than TV for news.
- Nationals hesitate to pay for news content. Majorities in Jordan (74%), Lebanon (75%), Qatar (71%), and Tunisia (61%) are unwilling to pay for any news, be it digital, TV, newspapers, or magazines. Since 2015, their willingness to pay for content dropped by 27 percentage points in Lebanon to just 23% and by 47 points in Qatar to only 24%.
- When asked about their favorite news organization, majorities of nationals in every nation except Saudi Arabia prefer a news organization based in their home country (62% regional average vs. 38% KSA).

Internet Use

- Time spent online correlates positively with the number of years using the internet. Nationals new to the internet (1 year) spend about eight hours a week online. This jumps to 14 hours per week for those who have spent two years using the internet and again rises to about 21 hours per week among those who have been online between three to seven years. Those with 10 or more years of internet experience spend about 29 hours per week online.
- Since 2015, the percentage of nationals using smartphones to connect to the internet rose by 13 percentage points, while the percentage using laptops or computers fell by 11 percentage points.[1]
- Nearly one in four nationals say the internet increases their contact with people who hold political and religious beliefs different from their own (23% different political beliefs, 24% different religious beliefs). More highly educated internet users (secondary education or higher) are twice as likely as those with the least education (primary or less) to engage online with people who have different viewpoints on religion and politics.

1. 2015 and 2017 Middle East data do not include Jordan.

Social Media

- WhatsApp tops the list of social media used by nationals across the region with two-thirds of nationals using it, compared to a marginally lower rate for Facebook and only one-half using YouTube (67% WhatsApp, 63% Facebook, 50% YouTube).
- While stable in Lebanon, Facebook penetration declined across all other countries by at least 10 percentage points since 2015, with the most dramatic declines of over 20 percentage points in Qatar and Saudi Arabia to 22% in Qatar and 55% in Saudi Arabia.
- The broadest trust among nationals for complete, accurate, and fair news coverage is for both mass media in general and for mass media in their own country—two-thirds trust these sources—while about half trust other mass media in the Arab world, media from Western countries, or social media (66% trust mass media in general, 66% mass media in their own country vs. 52% mass media in the Arab world outside their country, 49% mass media in Western countries, 47% social media).
- Currently, group chats and messages between individuals evenly split all direct messages sent and received at 50% each. This represents a significant increase in group messaging of 15 to 42 percentage points in all countries except Qatar where the portion of nationals using group messaging decreased since 2015 (by 14 percentage points) to one-third of all direct messaging.

Mobile

- Nearly three-quarters of internet users across the region use Wi-Fi or mobile data services to connect to the internet. However, Wi-Fi use varies by country from less than half of Jordanians to two-thirds of Tunisians and nine in ten across the other nations (40% Jordan vs. 63% Tunisia, 91% Lebanon, 87% Qatar, 84% KSA, 97% UAE).
- Nationals who get news via smartphone at least once a day are also more likely to get news via other platforms—both digital and offline—on a daily basis.
- Just over half of nationals use news apps and just over one-quarter use them daily. Using news apps is most popular in Saudi Arabia and the UAE and least popular in Qatar (use at all: 85% KSA, 86% UAE vs. 52% Jordan, 49% Tunisia, 42% Lebanon, 33% Qatar).

Free Speech

- Three times as many nationals think people should be able to publicly criticize the government's policies than should be allowed to make offensive statements about one's religion and beliefs or about minorities.
- Two-thirds of Lebanese support the right to publicly criticize government policies and just one-third say the government has the right to prevent such critiques. Qatar, Saudi Arabia, and especially the UAE represent the opposite end of the spectrum, with about one-quarter of Qataris and Saudis and only 14% of Emiratis believing people should have the freedom to criticize government policies.
- Across the region, those with the lowest education (primary or less) are the least likely to agree people should be able to express unpopular ideas, criticize government, or speak their minds about politics online—by about 20 percentage points compared to those with more education.

- While younger nationals are more likely to support free speech online, higher percentages of younger nationals also express concerns about online monitoring by governments and companies (governments: 27% 45+ year-olds vs. 35% 18-24 year-olds, 39% 25-34 year-olds, 38% 35-44 year-olds; companies: 28% vs. 41%, 43%, 42%, respectively).
- Roughly half of nationals support tighter internet regulation for political content, culturally sensitive content, and cost (making sure the internet is affordable), while close to six in 10 support tighter regulation to protect the privacy of online users.

Online Privacy

- Only one in five nationals say that concerns about privacy have changed the way they use social media, ranging from three in 10 Jordanians and Emirates to half that among Lebanese (31% Jordan, 30% UAE vs. 15% Lebanon).
- Nationals who worry about governments checking what they do online are more likely to be Facebook users than those who are not worried but less likely to be WhatsApp or Instagram users (Facebook: 75% worried vs. 66% not worried; WhatsApp: 71% worried vs. 79% not worried; Instagram: 34% worried vs. 42% not worried).
- American internet users express more concern about online surveillance by both governments and companies compared with Arab internet users. Half of American internet users worry about governments and six in 10 worry about corporations checking their online activity (2015: government: 39% Middle East vs. 49% U.S.; companies: 43% Middle East vs. 60% U.S.).[2]

Bias and Credibility

- Since 2013, perceptions of news credibility increased in most countries but fell in Jordan and Saudi Arabia (Lebanon: 25% in 2013 vs. 38% in 2017; Qatar: 57% vs. 62%; Tunisia: 23% vs. 45%; UAE: 73% vs. 85%; Jordan 66% vs. 38%; KSA: 73% vs. 59%). Two-thirds of Arab nationals overall say they trust mass media such as newspapers, TV, and radio to report news fully, fairly, and accurately. In comparison, a 2016 Gallup poll revealed that just 32% of Americans trust the mass media (Gallup, 2016).
- Two-thirds of nationals say they trust mass media from their own country compared to only half who trust media from other Arab or Western countries.
- A majority of Qataris feel international news organizations' coverage of Qatar is fair (60%). Four in 10 Emiratis and Saudis say international news is fair or biased in favor of their countries, and almost no Emiratis perceive a negative bias (UAE: 42% biased in favor, 49% fair, 6% against; KSA: 40% biased in favor, 40% fair, 18% against). In contrast, more than half in Lebanon believe coverage is biased against their country (53%).

Focus on Qatar

- Snapchat's popularity grew in all countries since 2015, but Qataris remain by far the nationals most likely to use it (64% Qatar vs. 51% KSA, 51% UAE, 20% Lebanon, 16% Jordan, 7% Tunisia).
- Not only are most Qataris online, they also spend a lot of time on the internet. Qataris estimate they spend an average of 45 hours per week on the internet compared with just 27 hours among other nationals.

2. 2015 Middle East data do not include Jordan.

- Qataris are only half as likely as other nationals to express concern about companies checking what they do online. They are also less likely to be worried about online surveillance compared to expatriates living in Qatar.
- Qatar is the only country where a majority of nationals feel news coverage of their country is fair (60% Qataris vs. 35% other nationals).
- Two-thirds of Qataris get news on their smartphone, a rate lower than nationals from all other countries except Tunisia (67% Qatar, 62% Tunisia vs. 77% Jordan, 76% Lebanon, 94% KSA, 98% UAE).

Global Comparisons

- Two-thirds of Lebanese and one-half of Tunisians think people should be able to publicly criticize the government's policies, while those in the Gulf states are much less likely to agree (2017: 66% Lebanon, 48% Tunisia vs. 27% KSA, 21% Qatar, 14% UAE). In comparison, nearly all Americans believe in the freedom of people to publicly criticize the government's policies.
- Six in 10 U.S. internet users, compared with just one-third in Arab states, worry about companies monitoring their online activity.
- In a 2016 Gallup poll, just 32% of Americans said they trust the mass media compared with two-thirds or more in Jordan, Lebanon, Qatar, Saudi Arabia, and the UAE, and 58% in Tunisia.
- Nearly all nationals in Lebanon, Qatar, Saudi Arabia, and the UAE own a smartphone and nearly as many Jordanians. In comparison, only 77% of Americans own a smartphone; only Tunisians own smartphones at a lower rate (65%).
- Internet users in the U.S. use email at much higher rates than those in the Middle East. Eighty-five percent of internet users in the U.S. check email every day compared to only three in 10 in the Middle East.

Focus on Egypt

- Support for freedom of speech online fell significantly in Egypt since 2013. In that year, roughly half (48%) of Egyptians said it's okay for people to express their ideas on the internet even if they are unpopular, but just 29% of Egyptians said the same in 2017.
- Even in the digital age, Egyptians spend more time face-to-face with family in 2017 than 2013. Despite the doubling of internet penetration in Egypt since 2013, the average number of hours Egyptians report spending face-to-face with relatives increased from 9 in 2013 to 20 in 2015 and 31 in 2017.
- While Facebook penetration is falling in most other Arab countries in this study, it rose significantly among Egyptians. In 2013, 81% of Egyptian internet users said they use Facebook, but that number rose to 93% in 2017.
- Fewer than 1 in 4 Egyptians used the internet in 2013, but half of all Egyptians are online in 2017 and nearly 6 in 10 own smartphones (57%).

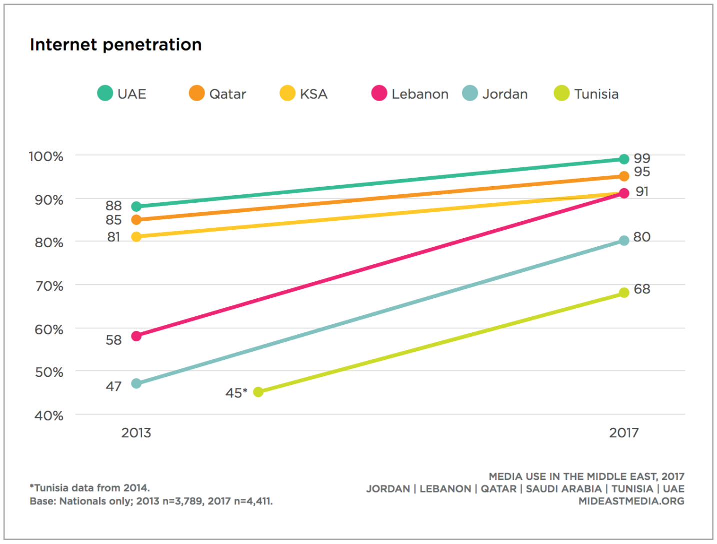
MEDIA USE BY PLATFORM

Television viewership finally showing signs of decline while internet penetration continues to rise.

In this chapter

- Internet penetration
- Socializing with others
- Languages used to access media
- A focus on sports

Internet penetration

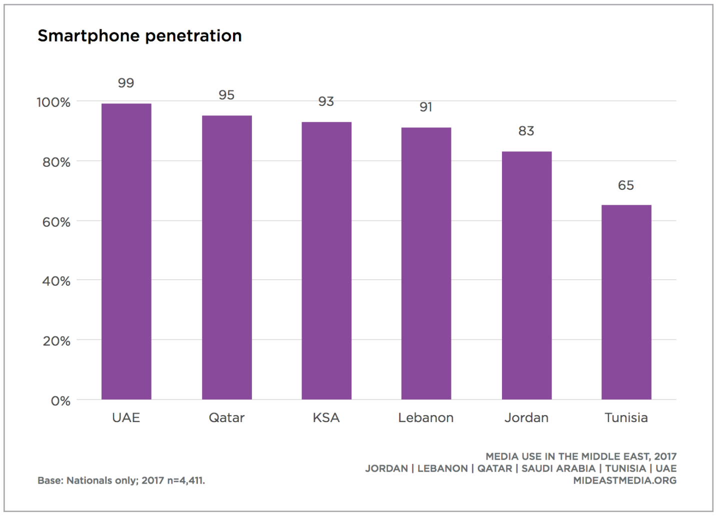


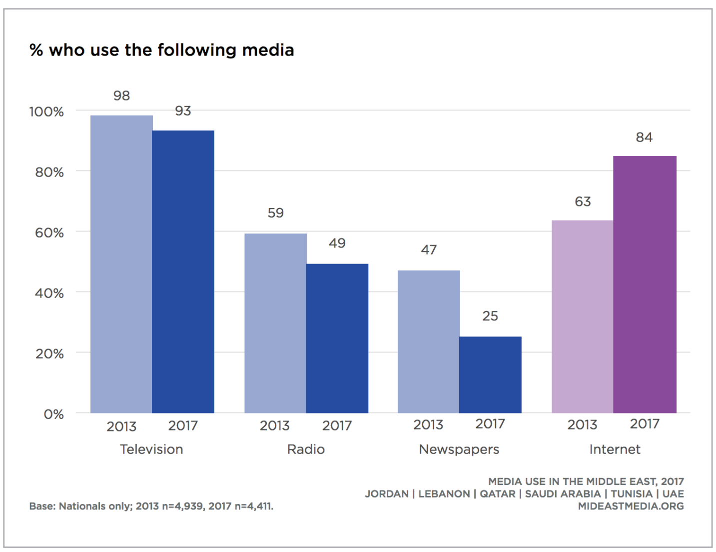
Over the past five years, 2013 to 2017, internet penetration rose in all six countries surveyed, and most dramatically in Jordan, Lebanon, and Tunisia (Jordan: 33 percentage point increase, Lebanon: 33-point increase, Tunisia: 24-point increase[1]). Even with this increase over time, internet penetration is comparatively low in Tunisia (68%), while more than nine in 10 nationals use the internet in Lebanon, Qatar, Saudi Arabia, and the UAE.

The youngest nationals (18-24) report close to 100% penetration, while the oldest nationals (45+) continue to lag far behind on internet use. Internet use is growing quickly among the middle age groups. In fact, 35 to 44 year-olds report a 36 percentage point increase in internet use from 2013 to 2017 (18-24 year-olds: 86% in 2013 vs. 96% in 2017; 25-34 year-olds: 77% vs. 94%; 35-44 year-olds: 52% vs. 88%; 45+ year-olds: 28% vs. 55%).

Internet penetration increases sharply with education, but it is the second least-educated group—those with an intermediate education—that saw the largest increase in internet use from 2013 to 2017, 39 percentage points (primary school or less: 13% in 2013 vs. 31% in 2017; intermediate: 38% vs. 77%; secondary: 71% vs. 91%; university or higher: 87% vs. 97%).

1. Percentage change in Tunisia is from 2014 to 2017.



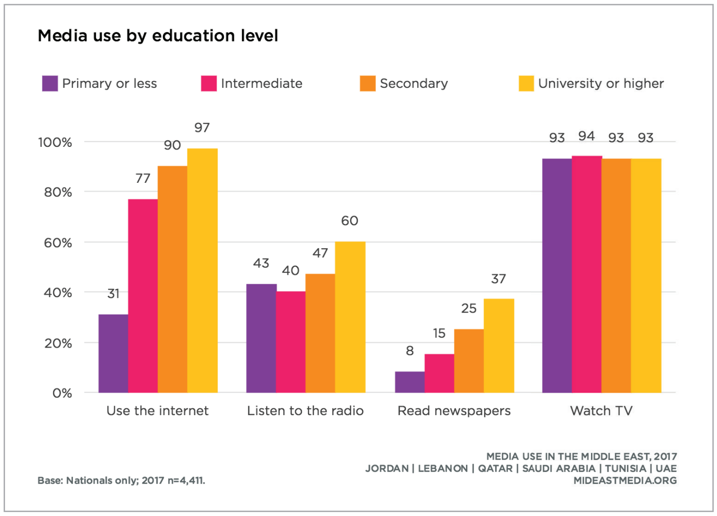


Smartphone ownership tracks closely with internet use in the six surveyed countries. Nearly all nationals in Lebanon, Qatar, Saudi Arabia, and the UAE own a smartphone—nine in 10 or more—compared with 83% of Jordanians and 65% of Tunisians. Smartphone use has increased substantially in all countries since 2013, but most notably in Jordan, Tunisia, and Lebanon (Jordan: 49 percentage point increase, Tunisia: 40-point increase, Lebanon: 38-point increase).[2]

Smartphone ownership is fairly consistent among nationals under the age of 45 but much lower among those at least 45 years old (95% 18-24 year-olds, 94% 25-34 year-olds, 89% 35-44 year-olds, 58% 45+ year-olds). Smartphone ownership also increases with education. Only one-third of those with a primary school education own a smartphone compared with nearly all university-educated nationals (31% primary or less vs. 97% university or higher).

As internet penetration rises, nationals are less likely to be using *offline* media platforms compared with 2013. Most nationals still watch TV, but the rate has declined modestly since 2013 (98% in 2013 vs. 93% in 2017). Rates of newspaper readership, however, declined more sharply from 47% in 2013 to 25% in 2017. Radio and magazines have also become less popular in the past five years (radio: 59% in 2013 vs. 49% in 2017; magazines: 26% in 2013 vs. 19% in 2017).

2. In 2017 the question was worded: “Do you own a smartphone?” In 2013, the question was worded: “Do you use the Internet through wireless handheld devices such as a mobile phone or tablet?”



The youngest cohort (18-24) uses media differently than nationals 25 years and older who are generally similar in their media use. The youngest nationals are the most likely to read books but the least likely to listen to radio or read newspapers (books: 40% 18-24 year-olds vs. 28% 25-34 year-olds, 24% 35-44 year-olds, 20% 45+ year olds; radio: 41% vs. 50%, 54%, 51%, respectively; newspapers: 19% vs. 28%, 28%, 27%, respectively). At least nine in 10 nationals across all age groups watch TV.

Media use increases with education for all platforms except TV, which is watched by almost all nationals regardless of education level. Compared to those with a primary school education, university-educated nationals are more likely to engage with all media: 43% primary school vs. 60% university-educated listen to the radio, 6% vs. 42% read books, 8% vs. 37% read newspapers, and 4% vs. 25% read magazines.

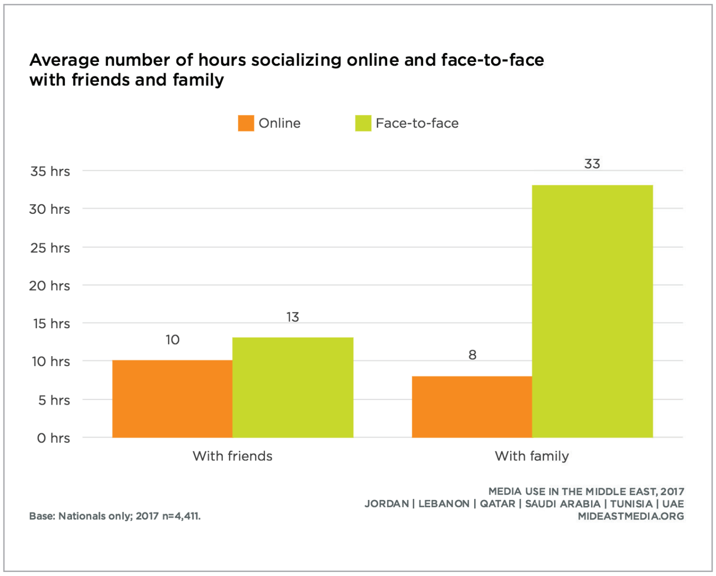
Nationals across all countries spend the greatest portion of their time online—an average of 29 hours per week—compared to 19 hours per week watching TV. The largest difference in hours spent online per week compared to watching TV is in Qatar and the smallest gap is in Tunisia (Qatar: 45 hours online vs. 15 hours watching TV; Tunisia: 25 hours online vs. 20 hours watching TV).

Interestingly, the amount of time internet users spend online per week has not changed since 2013 (28 hours in 2013 vs. 29 hours in 2017). The number of hours spent watching TV per week declined somewhat from 22 hours in 2013 to 19 hours in 2017.

There are clear distinctions between younger and older nationals in the time they spend consuming media. The number of hours spent online each week decreases with age, while time spent watching TV increases with age. Each week, younger nationals (18-24) are online for an average of 34 hours and spend 18 hours watching TV. In contrast, nationals 45 years and older watch an average of 23 hours of TV each week and are online for 19 hours.

Nationals with the least education (primary school or less) spend an average of 23 hours per week watching TV and 19 hours online. In comparison, university-educated nationals watch an average of 17 hours of TV each week and spend 30 hours online.

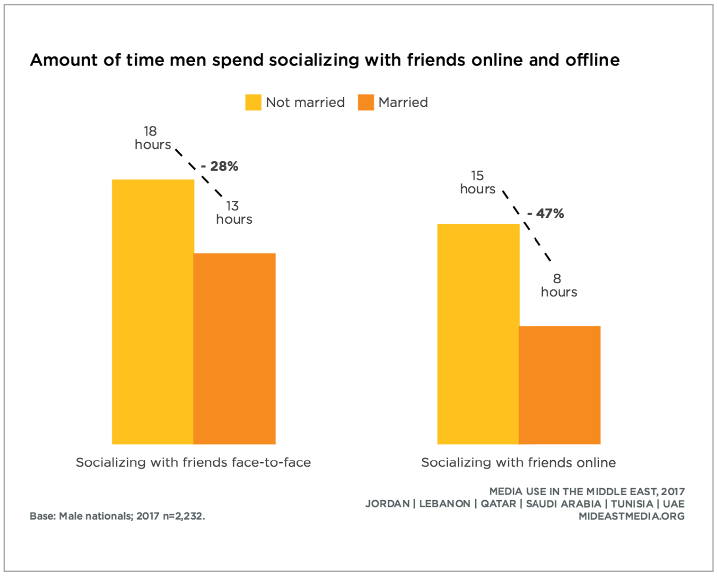
Socializing with others



Arab nationals spend nearly twice as much time socializing with family as they do with friends. In an average week, nationals spend about 41 hours socializing with family face-to-face or online, compared with 24 hours socializing with friends. Most of the socializing with family is face-to-face. On average, nationals spend 33 hours per week socializing with family in person and another eight hours socializing online. Time spent socializing with friends, on the other hand, is evenly split between face-to-face and online (13 hours face-to-face and 10 hours online).

Emiratis and Qataris spend the most time socializing with family face-to-face, while Saudis and Tunisians spend the least amount of time socializing with family in person (45 hours UAE, 43 hours Qatar vs. 28 hours KSA, 27 hours Tunisia). Nationals from all countries spend a similar amount of time face-to-face with friends ranging between 10 and 15 hours per week.

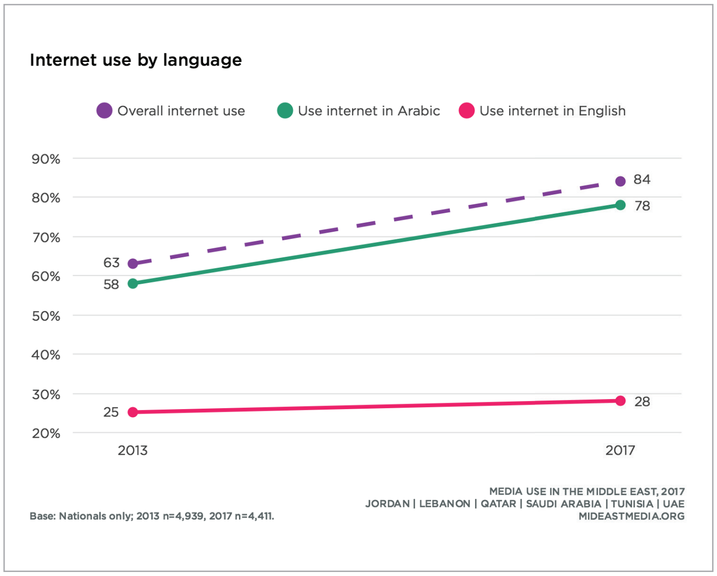
Nationals are more likely to spend their time online socializing with friends than with family. The one exception is the UAE, where Emiratis socialize online with family for an average of 17 hours per week compared with 12 hours online with friends. Interestingly, while Qataris spend nearly three times as many hours face-to-face with family as they do with friends, they are twice as likely to socialize with friends as family online (face-to-face: 43 hours family vs. 13 hours friends; online: 14 hours friends vs. 7 hours family).



As might be expected, single men and women spend more time socializing with friends than married respondents, while married men and women spend more time with family than their single counterparts. Compared to married men, single men spend five more hours per week socializing with friends in person and eight more hours per week socializing with friends online. Compared with married women, single women spend five more hours socializing with friends in person and seven more hours socializing with friends online. Married men, on the other hand, spend nine more hours per week socializing face-to-face with family than single men. Married women spend six more hours per week with family compared with their single counterparts.

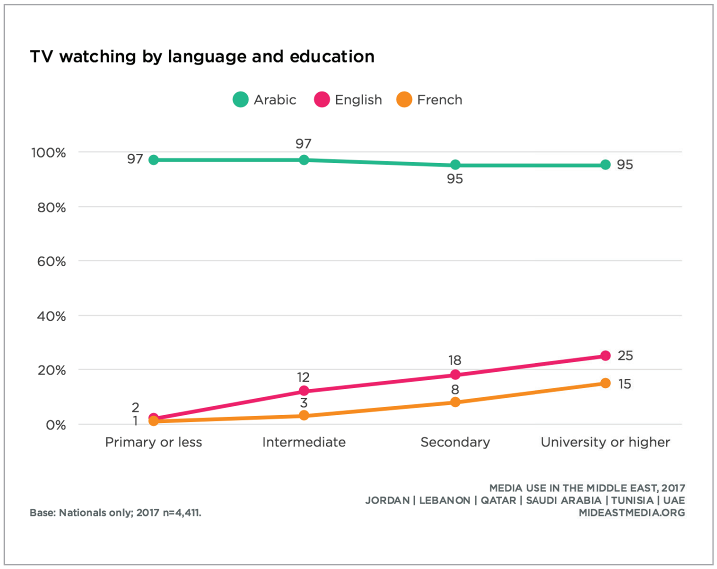
The way nationals socialize with friends changes with age. The youngest group (18-24) spends as much time every week socializing with friends online as face-to-face (16 hours online vs. 16 hours face-to-face). In comparison, the oldest age group (45+ year-olds) spends twice as much time socializing with friends face-to-face as online (11 hours face-to-face vs. 5 hours online). All age groups spend at least three times as much time socializing with family face-to-face vs. online, and for the oldest age group the difference between socializing face-to-face and online is sixfold (36 hours face-to-face vs. 6 hours online).

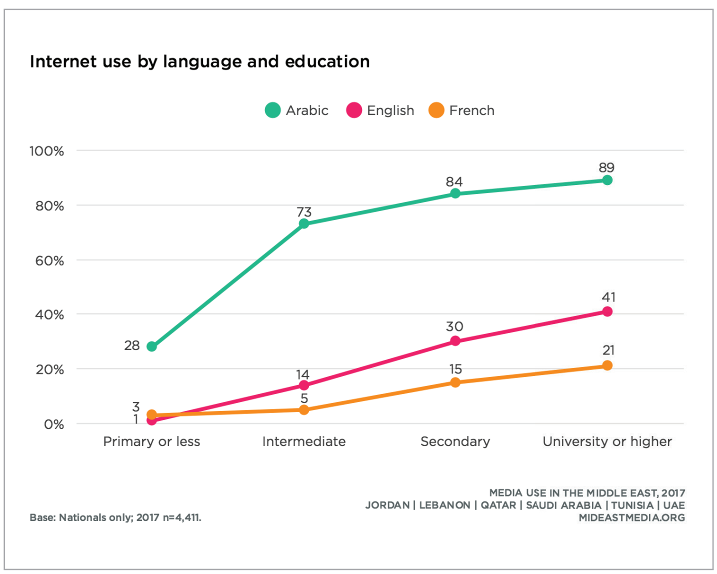
Languages used to access media



Nearly all Arab nationals access all media—internet, TV, radio, and newspapers—in Arabic, while use of English varies by medium. English is most often used when accessing the internet, followed by TV (28% internet, 17% TV). Far fewer nationals listen to the radio or read newspapers in English (4% radio, 2% newspapers). Lebanese, Qataris, and Emiratis are most likely to use the internet and watch TV in English (internet: 56% Lebanon, 49% Qatar, 33% UAE; TV: 34% Lebanon, 26% Qatar, 37% UAE). Tunisians and Lebanese also use media in French. Tunisians are more likely to use media in French than in English (TV: 27% French vs. 10% English; internet: 43% French vs. 13% English). By contrast, Lebanese nationals are less likely to access both TV and the internet in French than in English (TV: 11% French vs. 34% English; internet: 17% French vs. 56% English).

Use of Arabic online has increased proportionally with the increase in internet use over time. Sixty-three percent of nationals used the internet in 2013 compared with 84% in 2017 (a 21 percentage point increase). Fifty-eight percent used the internet in Arabic in 2013, a figure that reached 78% in 2017 (a 20-point increase). In comparison, use of the internet in English remains essentially flat, 25% in 2013 and 28% in 2017, despite the increase in internet use.



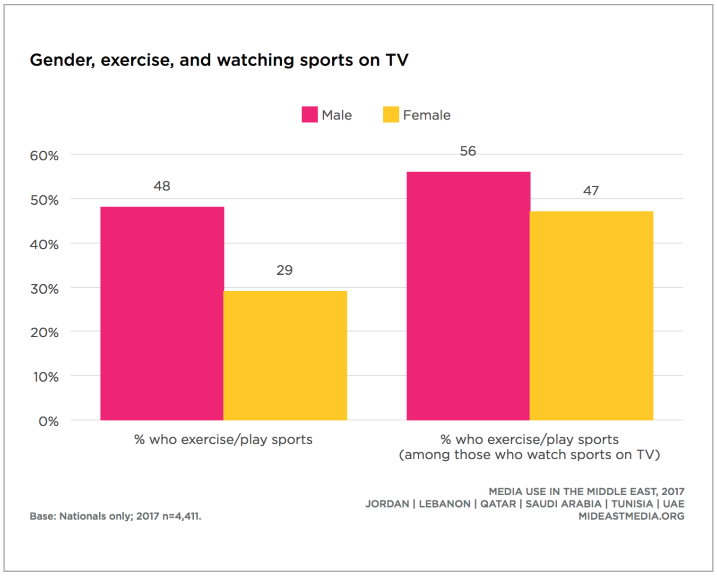


Age plays a role in which languages are used to access media. While almost all nationals across age groups watch TV in Arabic, watching TV in English decreases with age (24% 18-24 year-olds, 20% 25-34 year-olds,16% 35-44 year-olds, 7% 45+ year-olds). Similarly, while using the internet in Arabic is high for all age groups (except those 45 years and older who are less likely to use the internet at all), use in English decreases significantly with age (Arabic: 88% 18-24 year-olds, 87% 25-34 year-olds, 83% 35-44 year-olds, 52% 45+ year-olds; English: 41%, 33%, 23%, 12%, respectively).

Languages used to access media also vary with education. Education is not a factor with regard to watching TV in Arabic, but English TV viewership increases with education (2% primary or less, 12% intermediate, 18% secondary, 25% university or higher).

Use of the internet in Arabic follows the same pattern as overall internet use with a large jump between the primary and intermediate educational levels, whereas using the internet in English increases more gradually with education (Arabic: 28% primary or less, 73% intermediate, 84% secondary, 89% university or higher; English: 1%, 14%, 30%, 41%, respectively).

A focus on sports

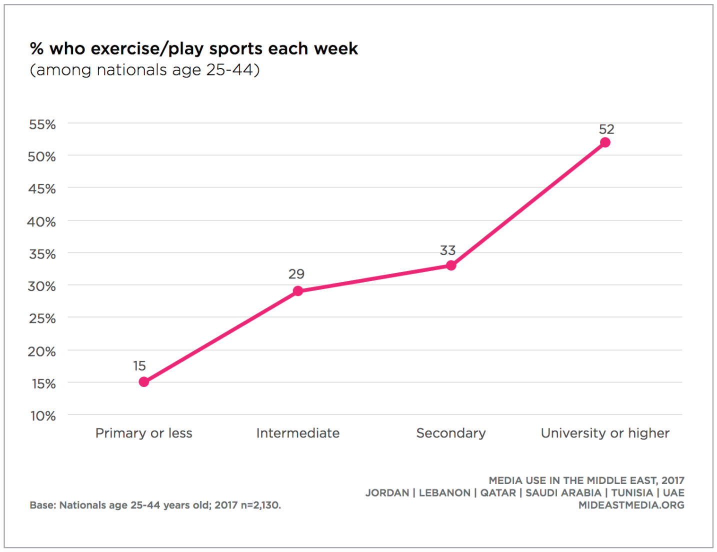


Playing sports or exercising is part of the weekly routine for nearly four in 10 nationals across the region (38%). Half or more nationals in the Gulf states and fewer in Jordan, Lebanon, and Tunisia, play sports or exercise in a typical week (60% Qatar, 54% UAE, 49% KSA vs. 24% Jordan, 35% Tunisia, 38% Lebanon). On average, nationals exercise or play sports 6.5 hours per week—about one hour a day (7.5 hours KSA, 7.3 hours Jordan, 6.3 hours Qatar, 6.3 hours Tunisia, 5.8 hours UAE, 5.6 hours Lebanon).

Weekly physical activity is less popular than watching TV or listening to the radio weekly but is a more common activity than reading books, newspapers, or magazines (38% exercising/playing sports vs. 93% TV, 49% radio vs. 29% books, 25% newspapers, 19% magazines).

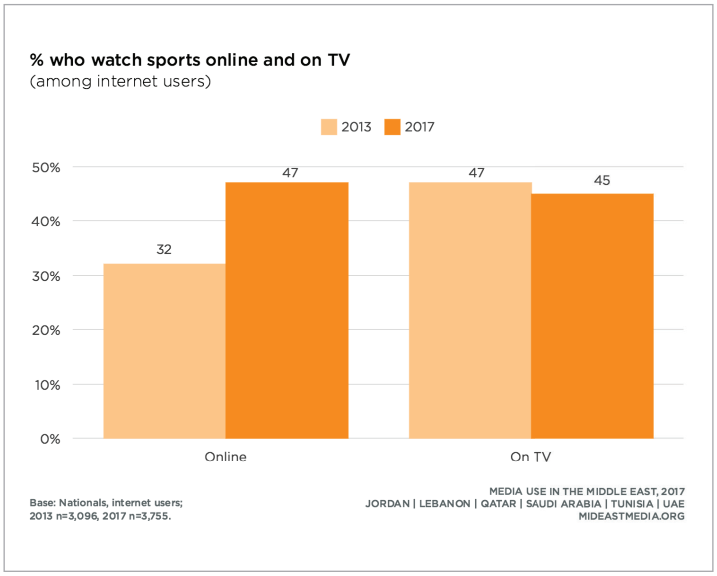
Exercising and playing sports are associated with a more general interest in viewing sports. Half of nationals who watch sports on TV or online exercise or play sports themselves, compared to only about three in 10 who exercise but do not watch sports (exercise/play sports: 52% who watch on TV vs. 31% who do not watch on TV; 54% who watch online vs. 27% who do not watch online).

Men are more likely than women to exercise or play sports—by 19 percentage points. Yet among those who do participate, both men and women invest somewhat similar amounts of time on exercise or sports (participate: 48% men vs. 29% women; hours per week: 7.1 hours men vs. 5.5 hours women).



Not surprisingly, exercise and sports participation rates are highest among the youngest age groups and decrease sharply with age (56% 18-24 year-olds, 45% 25-34 year-olds, 32% 35-44 year-olds, 18% 45+ year-olds). The number of hours spent exercising or playing sports per week, however, is fairly similar across age groups among those who participate, with less than two hours difference across age groups (7.1 hours 18-24 year-olds, 6.7 hours 25-34 year-olds, 5.3 hours 34-44 year-olds, 5.6 hours 45+ year-olds).

Participation in sports and exercise increases steadily with education with university-educated nationals five times more likely than those with a primary education to exercise or play sports (10% primary or less, 24% intermediary, 41% secondary, 51% university or higher). Those with a primary education who exercise do so two hours less per week than nationals with more education.

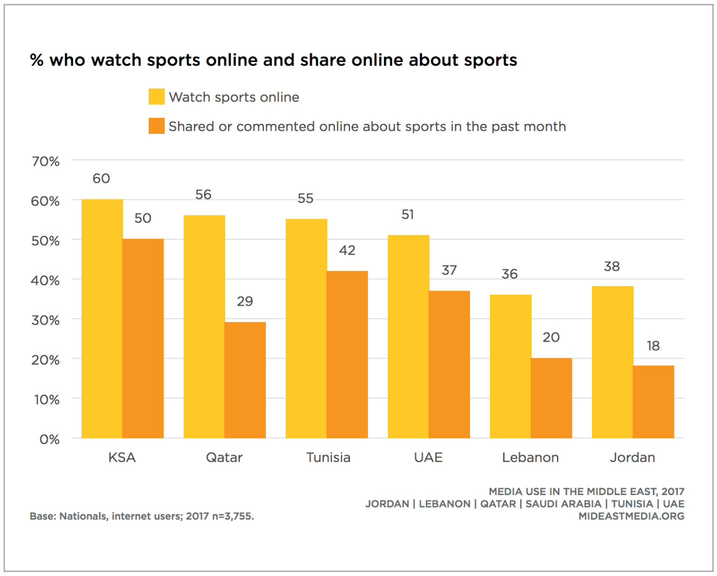


Four in 10 nationals watch sports on TV and nearly half of internet users watch sports online. While watching sports on TV remained stable since 2013, more internet users now watch sports online (TV: 41% in 2017 vs. 43% in 2013; online: 47% in 2017 vs. 32% in 2013).

Saudis and Emiratis watch sports on TV at higher rates than other nationals (55% KSA, 52% UAE vs. 44% Tunisia, 39% Lebanon, 36% Qatar, 29% Jordan). Lebanese and Jordanians are less likely than other nationals who use the internet to watch sports online (36% Lebanon, 38% Jordan vs. 60% KSA, 56% Qatar, 55% Tunisia, 51% UAE).

Patterns for watching sports are similar to those for playing sports, with younger, male, and more highly-educated nationals expressing broader interest in sports programming. Among internet users, men are three times more likely than women to watch sports, both on TV and online (TV: 65% men vs. 18% women; online: 70% men vs. 23% women).

Sports viewership decreases with age and increases with education. Nationals under 45 years old watch sports at a significantly higher rate than those 45 years and older (TV: 48% 18-24 year-olds, 47% 25-34 year-olds, 40% 35-44 year-olds, 29% 45+ year-olds; online among internet users: 54%, 51%, 43%, 32%, respectively). Sports viewership on TV and online increases incrementally with education (TV: 23% primary or less, 35% intermediate, 44% secondary, 48% university or higher; online among internet users: 28%, 33%, 49%, 53%, respectively).

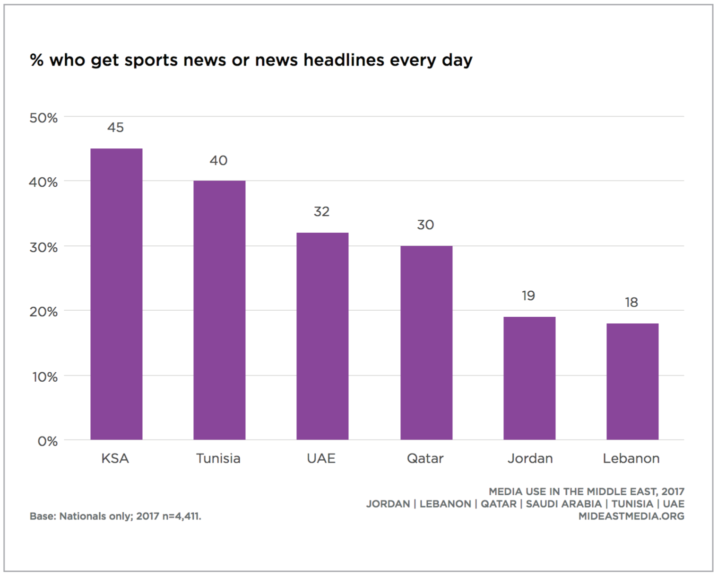


Three in 10 internet users have posted, shared, or commented on sports online in the past month, similar to rates for music and news and higher than postings about TV, films, or fashion (31% sports, 34% music, 36% news vs. 23% TV, 23% films, 22% fashion).

Posting about sports online is most widespread among Saudi and Tunisian internet users and least common among Lebanese and Jordanian internet users (50% KSA, 42% Tunisia, 37% UAE, 29% Qatar, 20% Lebanon, 18% Jordan).

As with watching sports, men are more than three times as likely as women to have posted about sports online in the past month (48% men vs. 13% women, among internet users).

The oldest and least educated internet users are least likely to post or share about sports online. Four in 10 of the youngest group and only two in 10 of the oldest group have posted about sports online in the past month (38% 18-24 year-olds, 33% 25-34 year-olds, 26% 35-44 year-olds, 20% 45+ year-olds, among internet users). The most highly educated internet users are twice as likely as the least educated group of internet users to post about sports online (16% primary or less, 19% intermediate, 33% secondary, 35% university or higher, among internet users).



Two-thirds of nationals follow news about sports and three in 10 do so every day (67% at all, 30% every day). Saudis and Tunisians are the most likely to follow sports news on a daily basis, Jordanians and Lebanese less so (45% KSA, 40% Tunisia, 32% UAE, 30% Qatar, 19% Jordan, 18% Lebanon).

Men are three times more likely than women to check sports news on a daily basis (46% men vs. 13% women). Interest in sports news also decreases with age, with the youngest group twice as likely as the oldest to check sports news daily (38% 18-24 year-olds, 35% 25-34 year-olds, 26% 35-44 year-olds, 17% 45+ year-olds). Similarly, highly educated nationals check sports news daily at double the rate of their least educated counterparts (16% primary or less, 21% intermediate, 32% secondary, 35% university or higher).

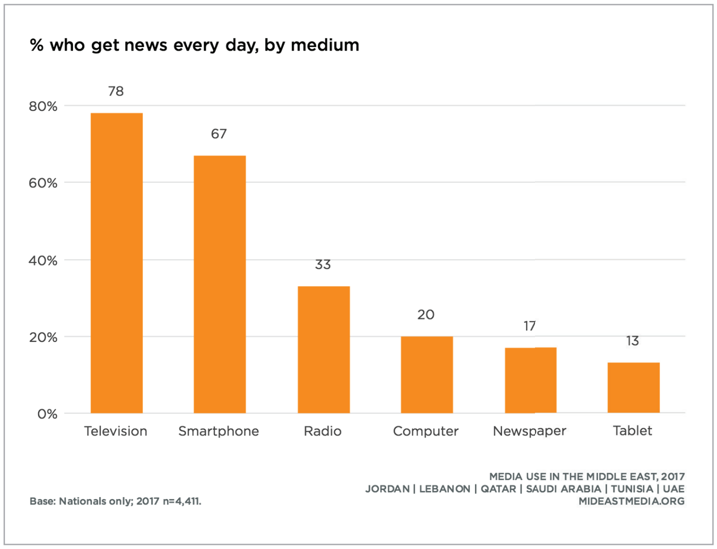
NEWS CONSUMPTION

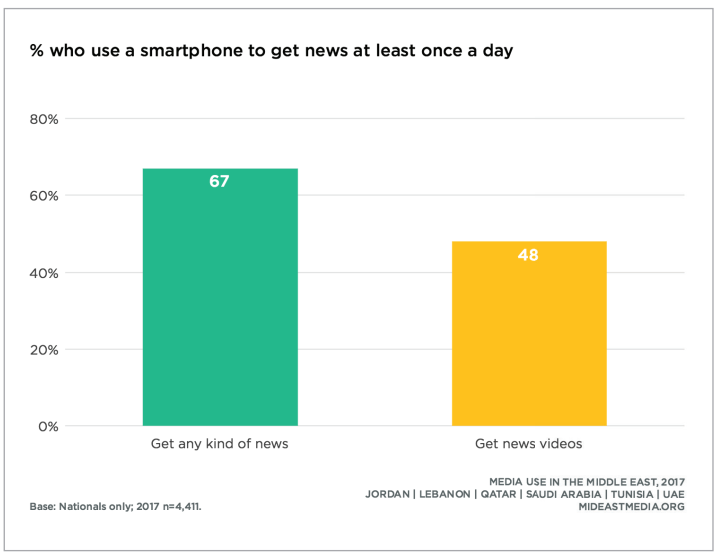
Two-thirds of nationals get news on a smartphone every day, while half watch news videos on a smartphone daily.

In this chapter

- News on smartphones
- Platform preferences
- News topics
- Preferred news outlets
- News on social media

News on smartphones

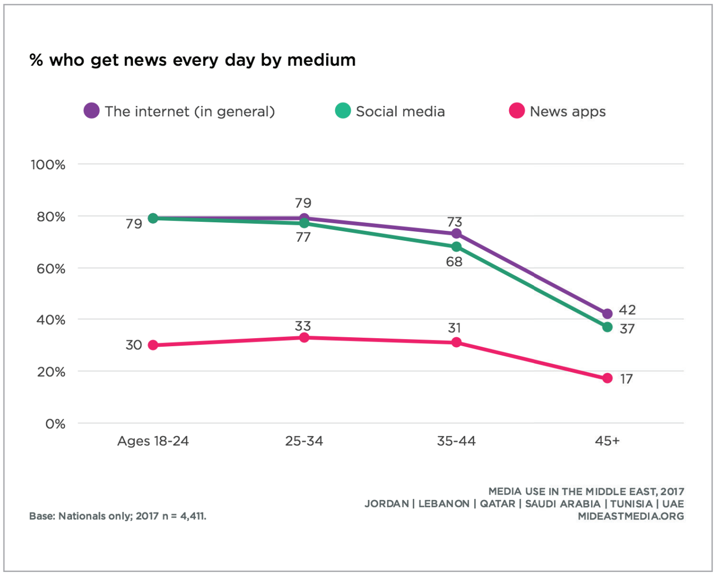




Digital news consumption across the Arab region is high and growing. People use multiple online devices to access news (e.g. computers, tablets), but none are used as much as smartphones. Almost all nationals in the surveyed countries own a smartphone—84% overall and more than nine in 10 in Lebanon, Qatar, Saudi Arabia, and the UAE. Furthermore, smartphones have become a primary source for accessing news and news headlines. Over three-quarters of nationals get news on their phones and two-thirds do so at least once a day (77% at all, 67% daily). In addition, seven in 10 nationals watch news videos on their phones and nearly one-half do so at least once a day (67% at all, 48% daily). Using smartphones for daily news checks is second only to accessing news on TV (78% TV).

Moreover, nationals of all ages use smartphones to check news and headlines daily. Among those who own a smartphone, eight in 10 of those under 45 years old check it for news at least once a day as do nearly seven in 10 of those 45 and older (78% 18-24 year-olds, 82% 25-34 year-olds, 80% 35-44 year-olds, 68% 45+ years-old).

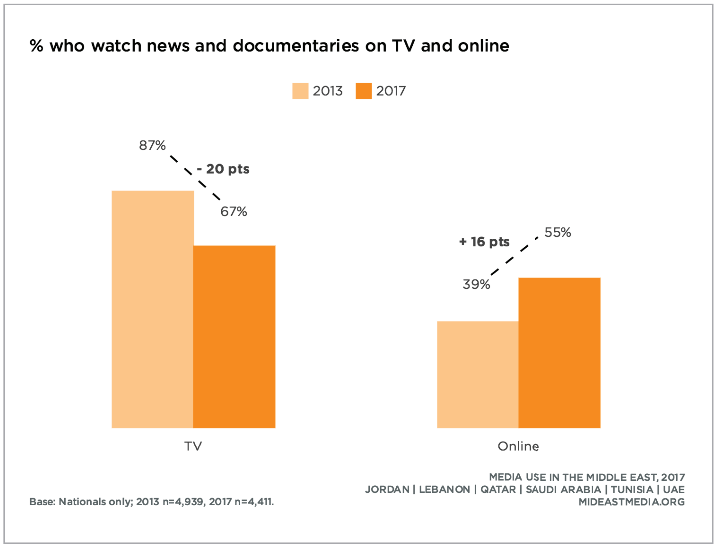
Platform preferences

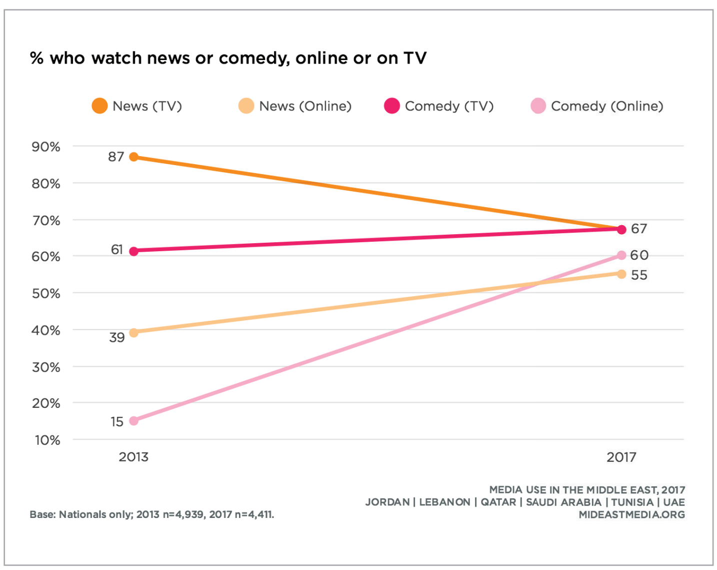


TV is the most popular news platform with 78% of all nationals watching news on TV each day. TV is followed by interpersonal interactions (online and offline) as well as the internet in general as daily sources of news. Two-thirds of nationals say they get news each day from face-to-face interactions with family and friends (68%), direct messaging (69%), social media (66%), and from the internet more broadly (69%). News apps are not as popular with 55% using news apps at all and 28% of nationals using them daily. Nearly two in five nationals listen to news on the radio each day, while less than one in five read newspapers daily (38% radio, 18% newspapers).

Sources used for news vary by country. In Jordan, Lebanon, and Tunisia, nationals get news more frequently from TV than online sources, while larger proportions of Qataris, Saudis, and Emiratis turn to the internet more than TV for news. Also, Qataris are much less likely than nationals from other countries to get news from friends and family on a daily basis (48% Qataris vs. 69% other nationals).

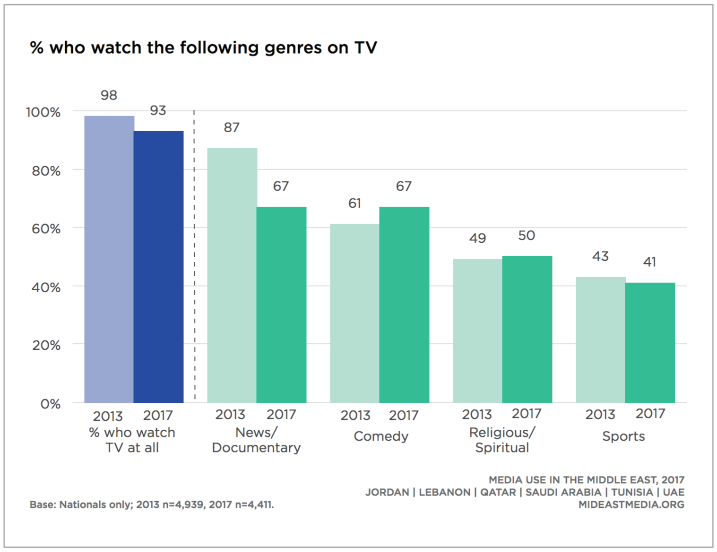
Younger nationals in particular turn to the internet for news. The youngest age group (18-24) gets news more frequently from online sources than TV, while older nationals (45+) are less likely to be online and more likely to turn to TV for daily news (18-24 year-olds: 79% internet vs. 70% TV; 25-34 year-olds: 77% internet vs. 79% TV; 35-44 year-olds: 81% internet vs. 73% TV; 45+ year-olds: 42% internet vs. 85% TV).

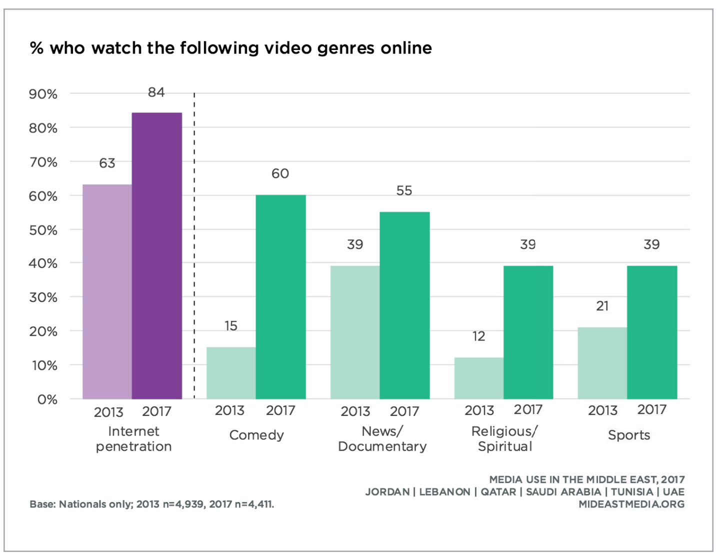




Arab nationals increasingly rate online platforms as important sources for news, and the internet is now at parity with TV and interpersonal sources with regard to its perceived importance. TV and interpersonal sources continue to be very important for news (TV: 86% in 2013 vs. 88% in 2017; interpersonal sources: 79% in 2013 vs. 78% in 2016). Over the same period, the importance of the internet for news increased 15 percentage points from 65% in 2013 to 80% in 2017. Social media and direct messaging are also broadly seen as important for news, but news apps less so (70% social media, 69% direct messaging, 50% news apps).

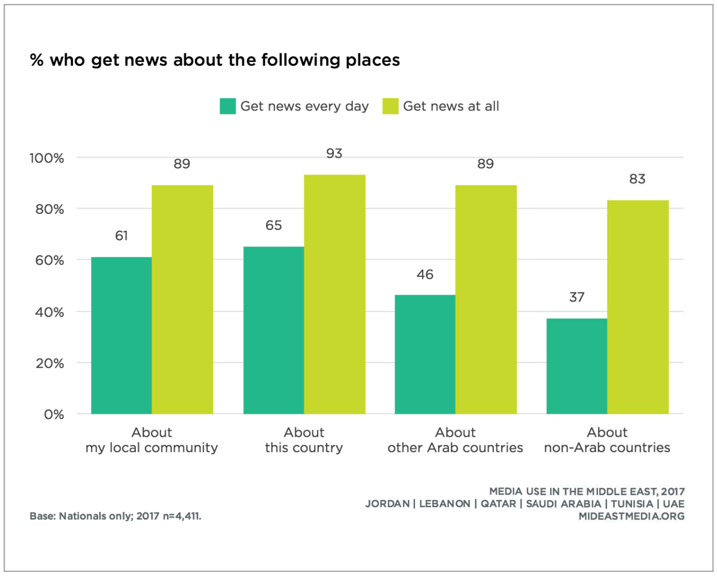
The proportion of nationals across the region citing newspapers as important news sources declined by 13 percentage points since 2013 to 38%. Jordan and Lebanon experienced the largest drops in newspaper importance over the past five years (Jordan: 61% in 2013 vs. 16% in 2017; Lebanon: 57% in 2013 vs. 32% in 2017).





In all countries except Qatar and the UAE, watching news on TV is more common than watching online. However, rates of watching news on TV are declining while online viewership rates are increasing. The news-viewing TV audience declined by 20 percentage points since 2013 with a nearly identical rise in news-viewing online. Besides news, other genres of TV programming (e.g. sports, religion) experienced relatively stable viewership over the same time period, while viewership of comedy on TV increased.

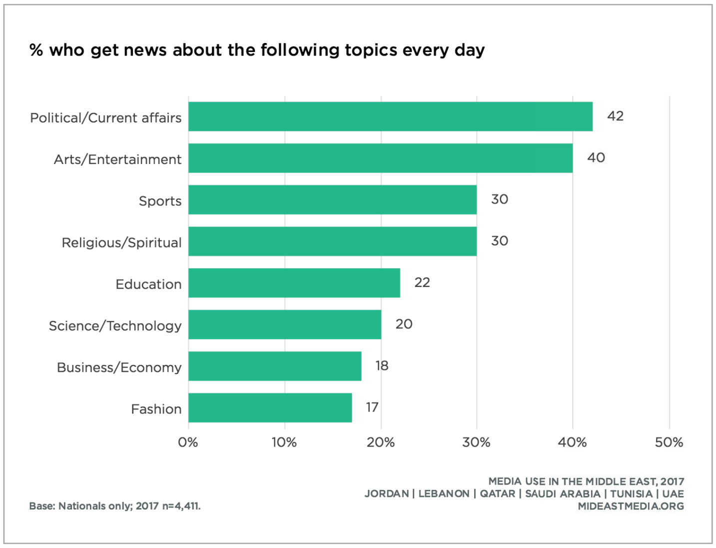
News topics



Across the region, most nationals—about nine in 10—consume both local and international news (89% my community, 93% this country, 89% Arab countries, 88% countries outside Arab region). However for daily consumption, nationals prioritize their own national and local news ahead of both news about other Arab countries and countries outside the region (over 60% get local news about their country or community on a daily basis vs. under 50% who get new about the Arab region and other regions daily). Only in Saudi Arabia do nationals consume daily news about all locations at equal rates.

These priorities and levels of engagement vary little by cultural ideology (conservative or progressive), education, gender, or age, with only a few exceptions. Education only plays a modest role in consuming news from beyond the Arab region (74% primary or less, 79% intermediate, 82% secondary, 89% university or higher). Men are slightly more likely than women to consume news about both Arab nations outside their country and the non-Arab world (other Arab countries: 92% men vs. 85% women; countries outside the Arab region: 87% men vs. 79% women).

Compared with 2013, more nationals now seek local, national, and international news on the internet—a 19 percentage points increase—from 54% in 2013 to 73% in 2017. Interestingly, among internet users, "looking for local, national, and international news" is the only activity that a smaller portion of younger people do online compared with their older counterparts (41% 18-24 year-olds vs. 52% 25-34 year-olds, 52% 35-44 year-olds, 51% 45+ year-olds).



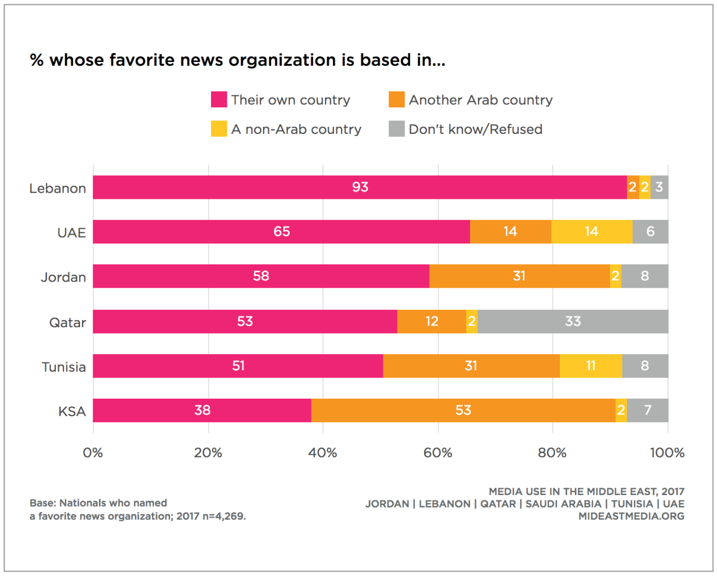
Nationals express interest in a wide array of news topics. Religious and spiritual news, along with arts and entertainment and political and current affairs, rank as the top three most widely—and equally—popular news types (85% religious/spiritual, 85% arts/entertainment, 84% political/current affairs). Two-thirds or more of nationals consume news about science and technology (71%), sports (67%), education (66%), and business and economy (65%). Fashion news is slightly less popular (56%).

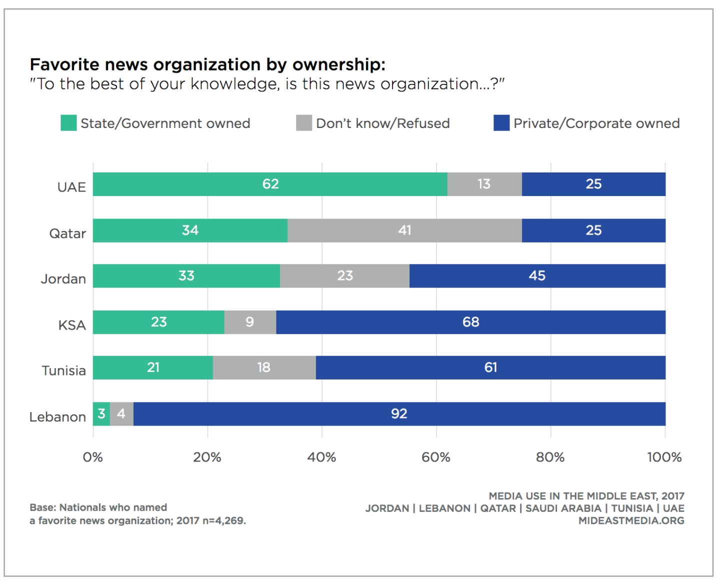
For daily news consumption, nationals prioritize political and current affairs along with arts and entertainment, with four in 10 checking news on these topics daily (42% political/current affairs, 40% arts/entertainment). Three in 10 access sports and religious/spiritual news each day (30% each). The most popular news genre consumed daily in each country is as follows: Jordan: political and current affairs (55%), Lebanon: political and current affairs (47%), Qatar: arts and entertainment (36%), Tunisia: sports (45%), Saudi Arabia: arts and entertainment (57%), and the UAE: sports (32%).

Clear gender differences emerge regarding both sports and fashion news, with men much more likely to access sports news daily and women more likely to access fashion news every day (sports: 46% men vs. 13% women; fashion: 25% women vs. 9% men). Men are also more likely to follow news about political and current affairs and business and the economy every day (political/current affairs: 48% men vs. 36% women; business/economy: 23% men vs. 14% women).

Despite the breadth and variety of the news consumed, nationals hesitate to pay for news content. Majorities in Jordan (74%), Lebanon (75%), Qatar (71%), and Tunisia (61%) are unwilling to pay for any news, be it digital, TV, newspapers, or magazines. Since 2015, their willingness to pay for content dropped by 27 percentage points in Lebanon to just 23% and by 47-points in Qatar to only 24%. In fact, on average across all nations, only one-third of nationals report any willingness to pay for news content (33%).

Preferred news outlets





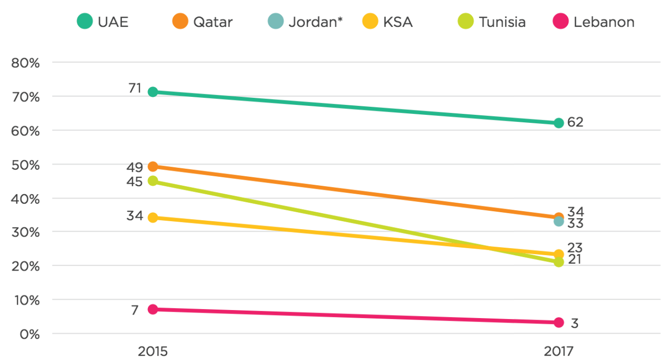
When asked about their favorite news organization, majorities of nationals prefer a news organization based in their home country, except in Saudi Arabia (62% regional average vs. 38% KSA). Over half of Saudis say their favorite news organization is based in another Arab country, and significant minorities in Jordan and Tunisia say the same (53% KSA, 31% Jordan, 31% Tunisia).

Across the region, six in 10 Arab nationals say their favorite news organization is privately—rather than government—owned (62%), but this varies widely by country. Majorities in Lebanon, Saudi Arabia, and Tunisia say their favorite news organization is privately owned—nearly all in Lebanon (92%)—while only one-quarter in Qatar and the UAE say the same.

Without exception, a clear majority of nationals say their favorite news organization is in the Arabic language—91% across all nations.

Nearly four in 10 nationals say they accessed news from Al Jazeera and Al Arabiya in the past week (39% Al Jazeera, 36% Al Arabiya). Significantly smaller proportions accessed news from either the BBC or CNN (17% BBC, 14% CNN). Nationals are far more likely to access these news outlets on TV than online. In fact, while about half of those who access these news outlets on TV also do so online, only a very few access them only online. (Al Jazeera: 36% TV vs. 14% online; Al Arabiya: 36% TV 36% vs. 15% online).

% who say their favorite news organization is state/government-owned



*Jordan not surveyed in 2015.
Base: Nationals who named a favorite news organization; 2015 n=2,779, 2017 n=4,269.

MEDIA USE IN THE MIDDLE EAST, 2017
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

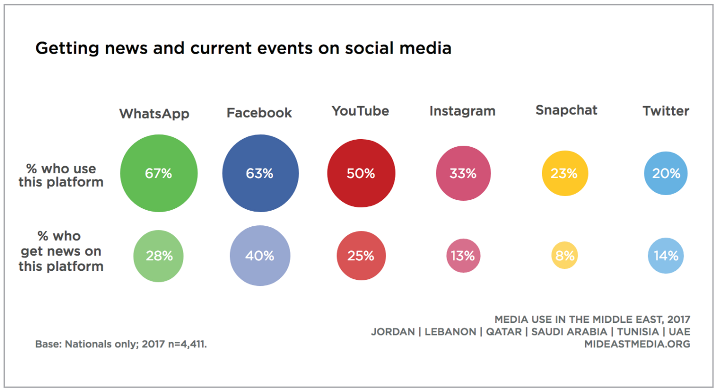
Saudis, Emiratis, and Tunisians watch the greatest variety of news networks both on TV and online. For example, CNN is watched by nationals in Saudi Arabia, the UAE, and Tunisia at or more than twice the rate of other countries (25% KSA, 20% UAE, 14% Tunisia vs. 8% Lebanon, 7% Jordan, 5% Qatar). Similarly for online sources, Saudis, Emiratis, and Tunisians view BBC video online more than other nationals (16% KSA, 14% UAE, 12% Tunisia vs. 5% Lebanon, 5% Qatar, 2% Jordan).

Age plays more of a role in platform choice than for choice of network. Younger groups favor the internet over TV for some networks. Over four in 10 of the oldest nationals (45+) watch Al Jazeera on TV compared to just one-quarter of the youngest group (41% 45+ year-olds vs. 27% 18-24 year-olds). In contrast, the youngest group (18-24 year-olds) watches Al Jazeera online more than their oldest counterparts (13% 18-24 year-olds vs. 9% 45+ year-olds).

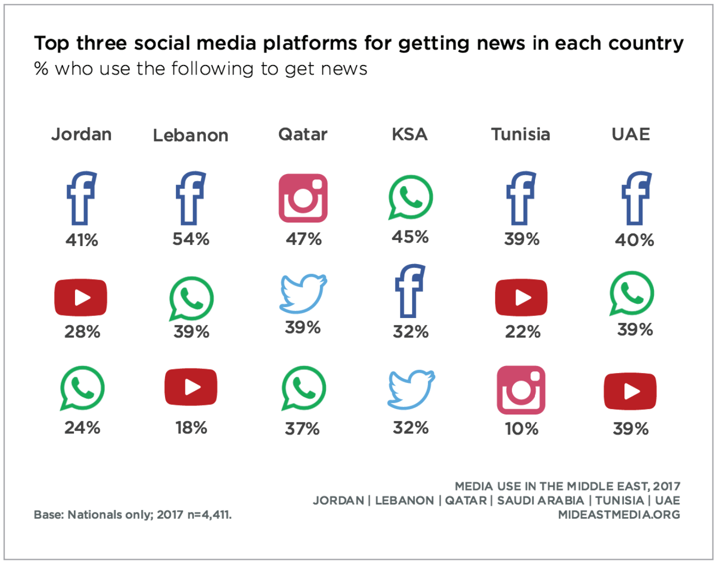
More men than women watch all of the news networks presented, both on TV and online—by an average of eight percentage points.

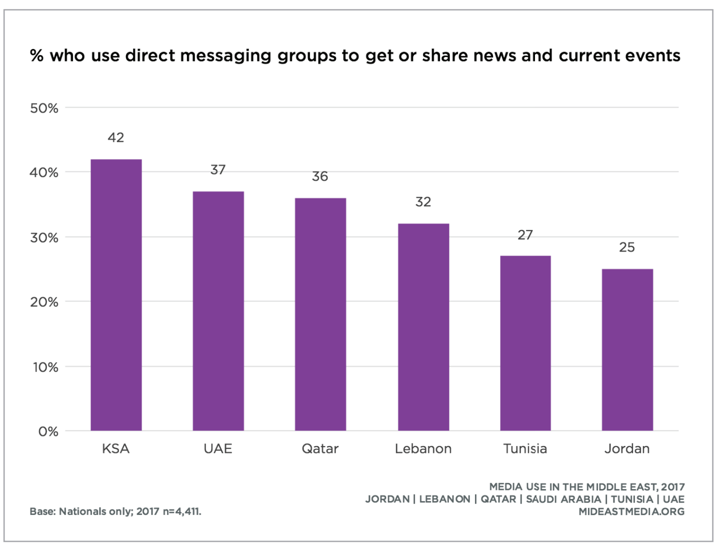
Nationals who feel their country is headed in the right direction are more likely than those who feel their country is off on the wrong track to watch Al Jazeera, Al Arabiya, BBC, and CNN—by an average of nearly nine percentage points. The largest gaps are in viewership for Al Jazeera and Al Arabiya (Al Jazeera: 43% right direction vs. 29% wrong track; Al Arabiya: 43% right direction vs. 29% wrong track). Nationals who feel their country is off on the wrong track are more likely to watch other news outlets both on TV and online (other TV outlets: 47% right direction vs. 73% wrong track; other online outlets: 30% right direction vs. 42% wrong track).

News on social media



Across all social media and messaging platforms, WhatsApp, Facebook, and YouTube lead the way not only in general use but also for getting and sharing news. While a few more nationals use WhatsApp than Facebook, Facebook holds an advantage over WhatsApp for getting and sharing news (getting news: 12-point advantage, sharing news: 8-point advantage).





Social media platforms' use for news varies by country. Using YouTube for news is most common among nationals in Jordan, Saudi Arabia, and the UAE (28% Jordan, 30% KSA, 39% UAE). Across the region, both Snapchat and Twitter attract comparatively small numbers for news consumption (Snapchat: 8% get news, 6% share news; Twitter: 14% get news, 10% share news). However, both are popular means of accessing news in Qatar, the UAE, and Saudi Arabia. In Qatar and the UAE, Snapchat is used to get and to share news by at least two in 10 nationals (get news: 33% Qatar, 26% UAE, 17% KSA; share news: 25% Qatar, 21% UAE. 14% KSA). At least three in 10 nationals in these three countries get news from Twitter and significant portions share news via this platform (get news: 39% Qatar, 32% KSA, 29% UAE; share news: 24% Qatar, 24% KSA, 14% UAE). Comparatively, under 10% in Jordan, Lebanon, and Tunisia get or share news through Snapchat and Twitter.

Nearly one-third of all nationals say they share or get news via social media or direct messaging (31% social media, 32% direct messages). However, less than one in five exchange messages in a messaging group of a news organization (17%). Saudis demonstrate the highest rates for getting or sharing news online (52% social media, 42% direct message, 36% in a direct messaging group with a news organization).

Nationals who agree that the internet provides them increased political influence are more likely than those who disagree to both share news online and send or receive news content via direct messaging (share news online: 42% of those who agree they can have more political influence vs. 27% disagree; send/receive news via direct messaging: 40% agree vs. 31% disagree).

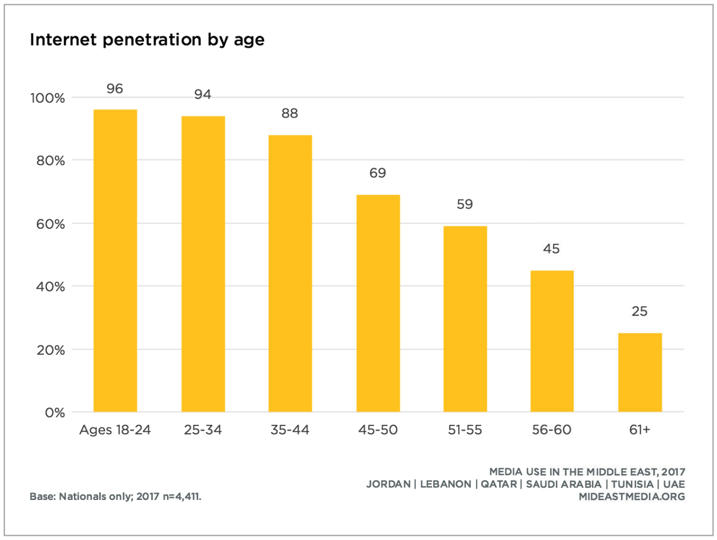
INTERNET USE

Nearly a quarter of nationals who use the internet say it increases their contact with people who have political views different than their own.

In this chapter

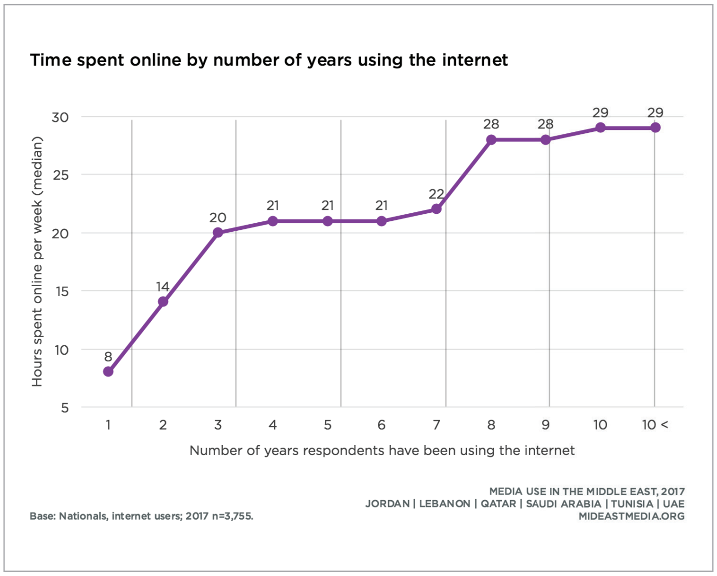
- Basic usage
- What people do online
- Connecting to different viewpoints
- Content preferences on TV and online

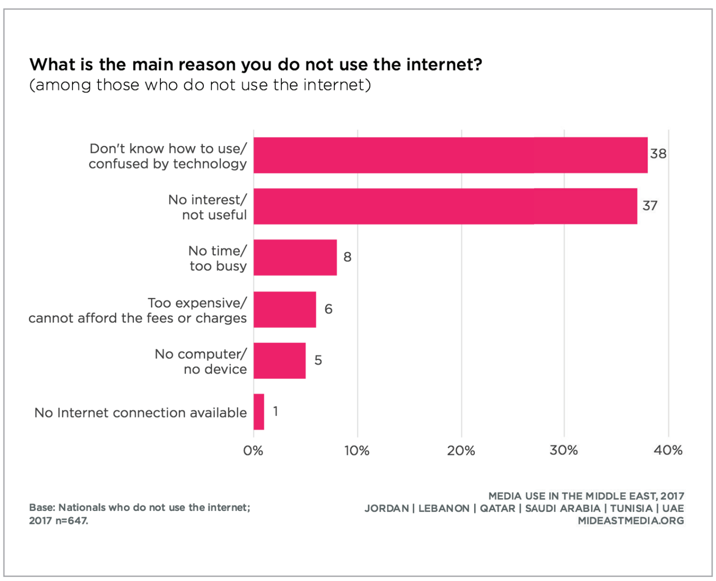
Basic usage



Since 2013, internet penetration rose by more than 20 percentage points to 84% of all nationals. The most dramatic increases in internet use are seen in Jordan and Lebanon (Jordan: 33 percentage point increase; Lebanon: 33-point increase). Currently, over nine in 10 nationals in Lebanon, Qatar, Saudi Arabia, and the UAE use the internet, while internet penetration is lower in Jordan and Tunisia despite significant increases in use over the past five years (2017: 80% Jordan, 68% Tunisia).

The most educated respondents (university or higher) are three times more likely to use the internet than respondents with the lowest level of education (97% university or higher vs. 31% primary or less). The youngest age cohort is nearly four times as likely as the oldest cohort to use the internet (96% 18-24 year-olds vs. 25% 60+ years-old).



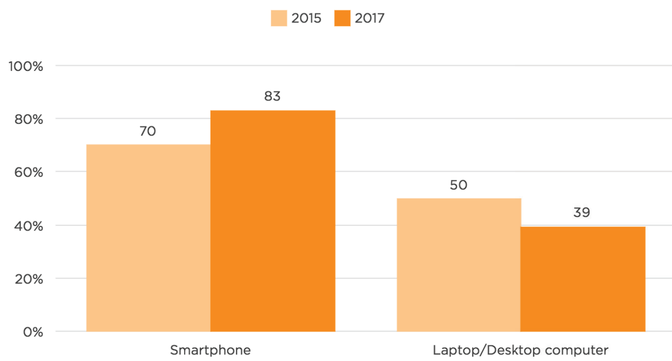


Nationals report that they have been using the internet for an average of 7.6 years, but this varies by country from about five years in Jordan to 10 years in Qatar and the UAE (5.3 years in Jordan, 6.4 in Tunisia, 8.0 in KSA, 8.6 in Lebanon, 9.7 in Qatar, 10.2 in UAE).

Time spent online correlates positively with the number of years using the internet. Nationals new to the internet (1 year) spend about eight hours a week online. This jumps to 14 hours per week for those who have spent two years using the internet and again rises to about 21 hours per week among those who have been online between three to seven years. Those with 10 or more years of internet experience spend about 29 hours per week online.

The small number of nationals who are not online cite two main reasons for not using the internet: 1) they do not know how to use it, or 2) they are not interested in using the internet/don't see a use for it (38% do not know how to use it/confused, 37% not interested/not useful). Lack of access does not appear to be a major barrier to using the internet (1% no internet connection, 5% no computer/ device, 6% too expensive, 8% too busy/no time).

Devices used to connect to the internet



*Jordan not included in calculations.
Base: Nationals only; 2015 n=3,067, 2017 n=3,530.

MEDIA USE IN THE MIDDLE EAST, 2017
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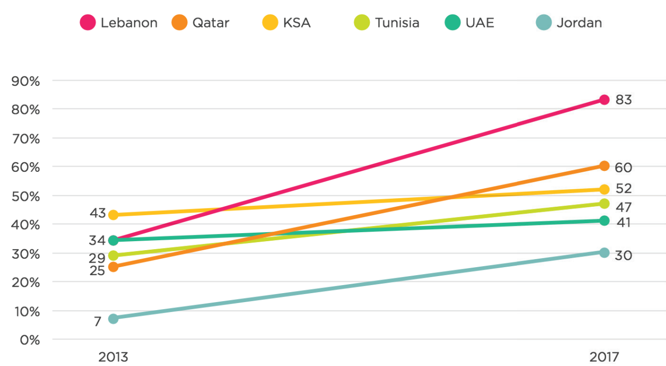
Since 2015, nationals are turning away from traditional computers and laptops to connect to the internet and are increasingly using smartphones.The percentage of nationals using smartphones to connect to the internet rose by 13 percentage points from 2015 to 2017, while the percentage using laptops or computers fell by 11 percentage points.[1] More than nine in 10 nationals in Lebanon, Qatar, Saudi Arabia, and the UAE use smartphones to connect to the internet, but fewer do so in Tunisia (63%). On the whole, tablet use remained stable from 2015 to 2017 but declined sharply in Qatar and the UAE (national average: 22% in 2015 vs. 23% in 2017; Qatar: 34% in 2015 to 18% in 2017; UAE: 50% in 2015 to 37% in 2017).

1. 2015 and 2017 Middle East data do not include Jordan.

What people do online

% who make or receive calls online at least once a day



Base: Nationals only; 2013 n=4,939, 2017 n=4,411.

MEDIA USE IN THE MIDDLE EAST, 2017
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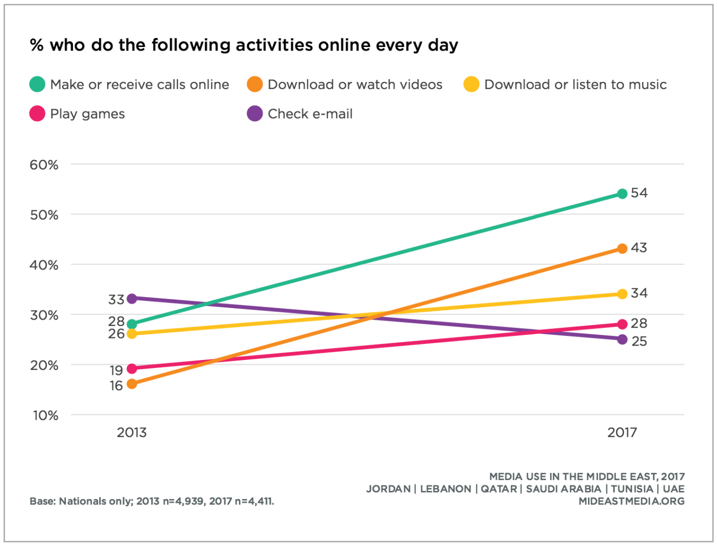
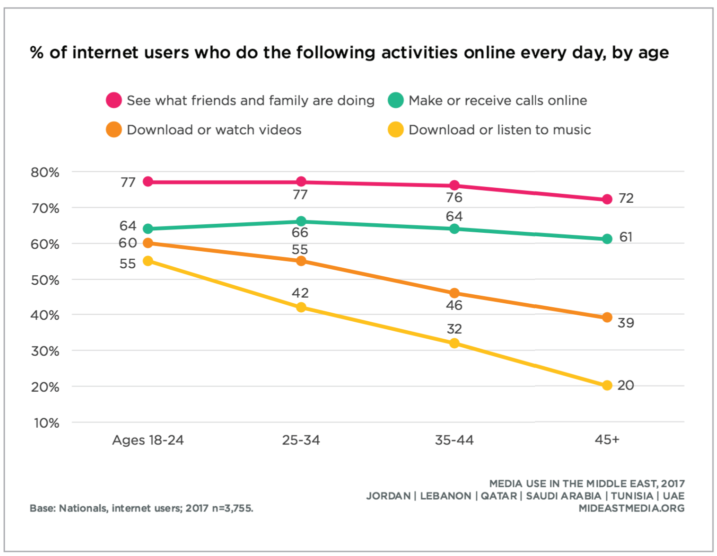
A majority of nationals throughout the region use the internet to check email, but while use of the internet for other purposes increased by 10 to 20 percentage points from 2013 to 2017, the number of people checking email has remained static (56% do at all in 2017 vs. 55% in 2013). Checking email is now one of the least common internet activities along with playing games (54% play games at all). About eight in 10 nationals make or receive calls online, check what friends and family are doing, and download or watch videos (77% make or receive calls, 80% check on friends and family, 77% watch or download videos). Seven in 10 nationals gather news and information or listen to or download music (73% news, 74% health, 70% religion, 68% music).

The share of respondents who make or receive calls, get health information, and watch or download videos online at all rose over 20 percentage points since 2013 (calls: 52% 2013 vs. 77% 2017; health information: 51% 2013 vs. 74% 2017; videos: 50% 2013 vs. 77% 2017). All other categories (except checking email) rose by at least 10 percentage points.

For *daily* online activity, about two-thirds of nationals check in with friends and family (64%); more than half of nationals make or receive calls online every day, nearly double the 2013 rate (54% 2017 vs. 28% 2013). Daily use of the internet to make or receive calls ranges from three in 10 in Jordan to more than eight in 10 in Lebanon. In Jordan, Lebanon, and Qatar, making and receiving online calls daily increased dramatically since 2013—more than 20 percentage points.



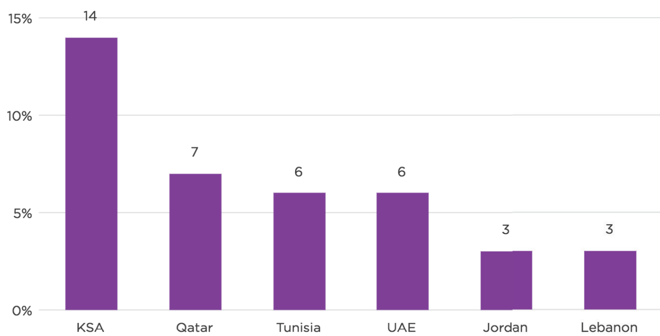


Four in 10 nationals look for news online on a daily basis, and two in 10 search for health and religious information every day (41% news, 21% health, 22% religion). This represents a 13 percentage-point increase for news and seven-point increase for health since 2013 (religious information was not included in the 2013 survey for comparison). Nationals are also consuming more entertainment online. The percent of nationals who download or listen to music or play games daily increased by nearly 10 percentage points from 2013. Nearly one in three nationals do these activities every day (34% download/listen to music, 28% play games).

Daily online activities vary more by education than by age. Looking for information (news, health, and religion) along with checking in with friends and family and making or receiving calls vary little by age. However, age does play a role in online entertainment. Among internet users, half or more of the youngest respondents (18-24) consume videos or music or play games online daily—about double the rate of the oldest group (45+).

Internet users with higher levels of education are more likely than those with less education to search for news online. Educational differences apply less to information-seeking of health and religious content, for which the lowest (primary or less) and the highest (university or greater) education groups search equally. Online socializing varies considerably by education. University-educated internet users are far more likely than those with a primary education or less to check in with friends and family or make or receive calls online on a daily basis. Compared to internet users with lower levels of education, highly educated internet users also use the internet more frequently to watch videos and listen to music, but playing games does not vary consistently with education.

Online learning:
% who say they have worked toward a certificate or degree by participating in an online course in the past year



Base: Nationals only; 2017 n=4,411.

MEDIA USE IN THE MIDDLE EAST, 2017
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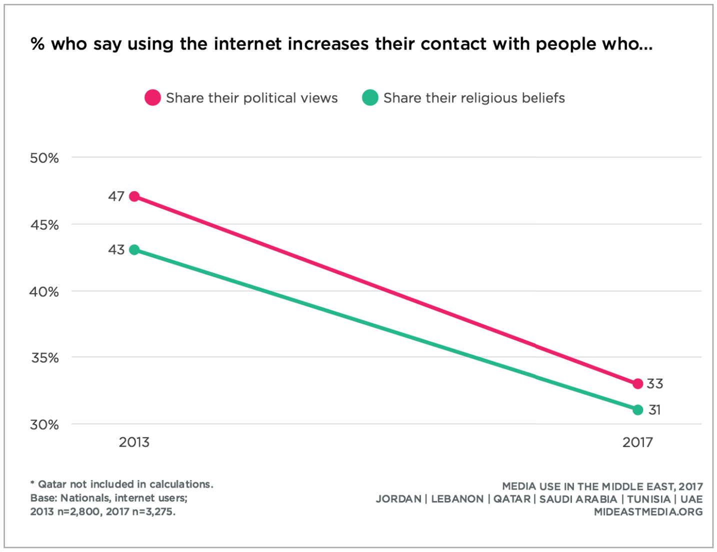
Across the region, one in 16 nationals say they worked toward a certificate or degree by participating in an online course or job training in the past year (6% online course, 6% online job training). Saudis are a notable exception. Fourteen percent of Saudis took an online course and 15% participated in online job training in the past year.

Participation in online courses and job training is highest among the youngest age group (online course: 10% 18-24 year-olds, 7% 25-34 year-olds, 4% 35-44 year-olds, 2% 45+ year-olds; online job training: 10%, 8%, 4%, 2%, respectively). Education also plays a role. One in 10 university-educated nationals have participated in an online course or job training in the past year compared with only 2% of those with a primary education or less.

Connecting to different viewpoints



For some users, the internet helps to increase contact with people who have both similar and different viewpoints. About one in three internet users say the internet increases their contact with people who share their political and religious beliefs, a drop from 2013 (share political beliefs: 47% in 2013 vs. 33% in 2017; share religious beliefs: 43% in 2013 vs. 31% in 2017).[2]

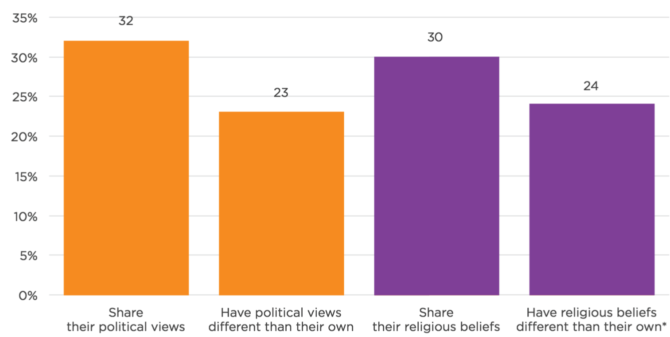
Additionally, nearly one in four nationals say the internet increases their contact with people who hold political and religious beliefs different from their own (23% different political beliefs, 24% different religious beliefs). This pattern varies considerably by country.

Saudi internet users, for example, are by far the most likely to say the internet increases their contact with people who have similar views as their own about politics and religion (KSA: internet increases contact: 57% similar political views, 53% similar religious beliefs). In contrast, less than one in five Tunisians and Emiratis say the internet increases their contact with others who hold similar political or religious viewpoints (Tunisia: 16% similar political views, 14% similar religious beliefs; UAE: 17% similar political views, 18% similar religious beliefs).

Additionally, nearly half of Saudi internet users say the internet increases their contact with people who have views about about politics and religion that are different than their own, compared with one in 10 Tunisians and Emiratis who say the same (internet increases contact: KSA: 48% different political views, 46% different religious beliefs; Tunisia: 9% different political views, 11% different religious beliefs; UAE: 9% different political views, 10% different religious beliefs).

2. Trended data do not include Qatar because the question was worded differently in Qatar in 2013.

% who say using the internet increases their contact with people who...



*Question not asked in Jordan.
Base: Nationals, internet users; 2017 n=3,755.

MEDIA USE IN THE MIDDLE EAST, 2017
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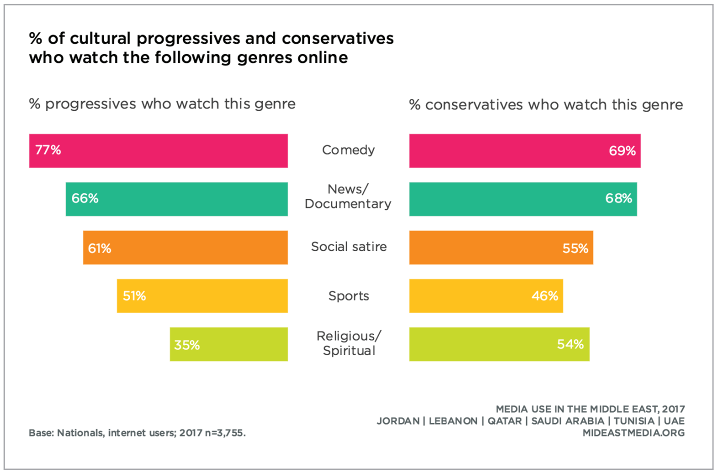
More highly educated internet users (secondary education or higher) are twice as likely as those with the least education (primary or less) to engage online with people who have viewpoints on religion and politics that are similar to their own. Higher-educated internet users are also more likely than those with less education to engage online with those who have different viewpoints on religion and politics compared with their own views.

Internet users who define themselves as progressive are more likely than self-defined conservatives to encounter people online with political views both similar to and different from their own (similar political views: 40% progressive vs. 28% conservative; different political views: 32% progressive vs. 20% conservative). While progressives and conservatives connect with people of like religious beliefs at similar rates, progressives are more likely than conservatives to engage online with people of different religious beliefs (similar religious beliefs: 33% progressive vs. 31% conservative; different religious beliefs: 29% progressive vs. 21% conservative).

Internet users who believe the internet affords political efficacy are at least three times as likely as those who do not hold this view to interact online with people who have both similar and dissimilar political beliefs (similar political views: 58% agree internet affords political efficacy vs. 8% disagree; different political views: 46% agree vs. 13% disagree).

Internet users who attend religious services weekly or more are more likely than those who do not attend services to say the internet increases contact with people sharing their religious beliefs (similar religious beliefs: 33% attend weekly services vs. 25% attend less than once a year or never).

Content preferences on TV and online



Comedy and news are the most popular genres watched by nationals in a typical week both online and on TV (online: 60% comedy, 55% news; TV: 67% comedy, 67% news). What is notable, though, is the shift in viewership by medium over time. The percentage of nationals watching comedy online jumped 45 percentage points from 15% in 2013 to 60% in 2017, yet rose only six points for TV (61% in 2013 vs. 67% in 2017). In comparison, the percent who watch news on TV declined by 20 percentage points from 87% in 2013 to 67% in 2017, while online viewership increased by 16-points from 39% in 2013 to 55% in 2017.

Nearly half of nationals watch social satire online, and four in 10 watch sports and religious/spiritual content online (47% social satire, 39% sports, 39% religious/spiritual). This represents a 27 percentage point increase for religious and spiritual content online and an 18-point increase for sports online compared with 2013 (social satire was not included on the 2013 survey for comparison).

Conservative nationals consume more religious content than progressives, both on TV and online (TV: 58% conservative vs. 37% progressive; online: 54% conservative vs. 35% progressive). Progressives, on the other hand, watch more comedy, social satire, and sports than conservatives on both platforms.

More men than women watch news and sports online (news/documentary: 60% men vs. 51% women; sports: 60% men vs. 19% women). Women watch more comedy on TV than men, but both watch comedy online at similar rates (comedy on TV: 70% women vs. 63% men; comedy online: 59% women vs. 61% men).

The youngest respondents (18-24) are least likely to watch news on TV (52% 18-24 year-olds vs. 81% 45+ year-olds). Online news consumption varies less by age, but the youngest group is also less likely to watch news online (60% 18-24 year-olds, 69% 25-34 year-olds, 68% 35-44 year-olds, 69% 45+ year-olds, among internet users).

Compared to older respondents, fewer young people watch religious programming, whether on TV or online. About one in three 18 to 24 year-olds watch religious or spiritual programming on TV or online compared with 50% or more of those 25 or older. Comedy and sports are the most popular online video genres for those under 45 years-old. About three-fourths of this group watches comedy videos online compared with 54% of those 45 years and older. About half of those under 45 years-old watch sports online compared with one-third of those 45 years and older.

Nationals of all education levels watch news on TV (70% primary or less, 74% intermediate, 64% secondary, 69% university or higher). There is, however, a 30 percentage point difference between the most and least educated internet users in watching news videos online (42% primary or less vs. 61% intermediate, 65% secondary, 72% university or higher).

Respondents with more education consume more comedy, social satire, and sports, both on TV and online, with a 15 to 25 percentage point variation between the most and least educated groups (comedy on TV: 53% primary or less vs. 69% university or higher; social satire on TV: 38% vs. 56%; sports on TV: 23% vs. 48%; comedy online among internet users: 53% primary or less vs. 73% university or higher; social satire online: 37% vs. 61%, sports online: 28% vs. 53%).

Less educated respondents are more likely to watch religious content on TV, but are equally likely to watch religious content online compared with their more educated counterparts (TV: 64% primary or less, 53% intermediate, 46% secondary, 51% university or higher; online among internet users: 48% , 45% , 44% , 52%, respectively).

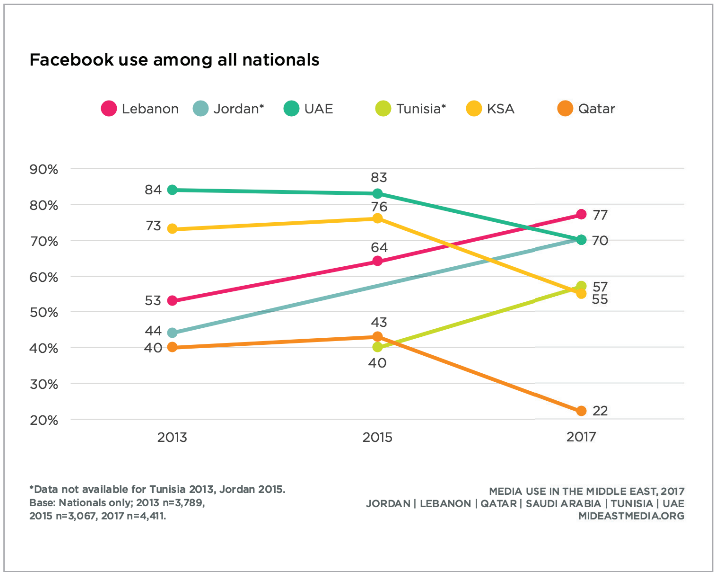
SOCIAL MEDIA

Since 2013, Facebook use has dropped in Gulf countries but risen in Lebanon and Jordan.

In this chapter

- Use by platform
- News and entertainment on social media
- Group messaging

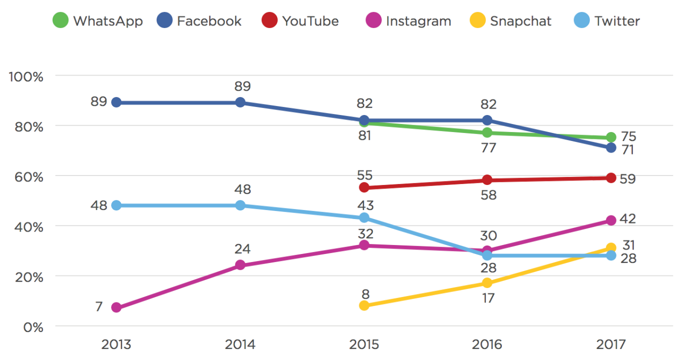
Use by platform



Arab nationals are avid social media users. WhatsApp tops the list of social media used by nationals across the region with two-thirds of nationals using it, compared to a marginally lower rate for Facebook and only one-half using YouTube (67% WhatsApp, 63% Facebook, 50% YouTube). Tunisians, however, prefer Facebook and YouTube (57% Facebook, 41% YouTube vs. 7% WhatsApp). Instagram, Snapchat, and Twitter form a second tier, with penetration rates between 20% and 35% (33% Instagram, 23% Snapchat, 20% Twitter). However, Twitter penetration is particularly low in Lebanon, Jordan, and Tunisia (13% Lebanon, 9% Jordan, 8% Tunisia). Facebook use is high everywhere except in Qatar and Saudi Arabia, where penetration dropped by over 20 percentage points since 2015 to 22% in Qatar and 55% in Saudi Arabia.

Despite general increasing social media use across the region, significant portions of Jordanians and Tunisians say they do not use any social media (20% Jordan, 30% Tunisia).

% who use the following social media platforms
(among internet users)



*Jordan not included in calculations.
Base: Nationals, internet users; 2013 n=2,610, 2014 n=2,426, 2015 n=2,247, 2016 n=3,355, 2017 n=3,068.

MEDIA USE IN THE MIDDLE EAST, 2017
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Among only internet users, Facebook penetration declined by 20 percentage points since 2013 (94% in 2013 to 74% in 2017). Most internet users, 60% to 80%, use Facebook, WhatsApp, and YouTube, while one-quarter to just over one-third of internet users use Instagram, Snapchat, and Twitter (80% WhatsApp, 74% Facebook, 60% YouTube vs. 39% Instagram, 28% Snapchat, 24% Twitter).

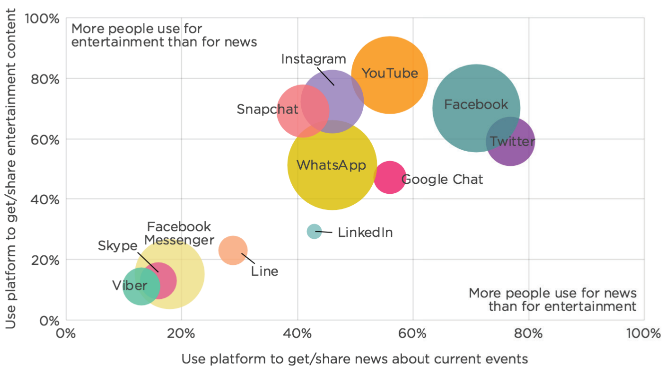
Among internet users, Facebook penetration declined across countries by at least 10 percentage points since 2015, except in Lebanon where Facebook use remains stable. Facebook penetration dropped precipitously among Qataris. WhatsApp is nearly ubiquitous, and at least two-thirds of internet users use either or both Snapchat and Instagram. While remaining steady in Qatar and Saudi Arabia, Instagram penetration since 2015 increased in Lebanon, Tunisia, and the UAE (Lebanon: 12 percentage point increase; Tunisia: 23-points; UAE: 17-points).

More than other platforms, Instagram, Snapchat, and Twitter use skew toward younger nationals (Instagram: 55% 18-24 year-olds, 38% 25-34 year-olds, 25% 35-44 year-olds, 9% 45+ year-olds; Snapchat: 41%, 28%, 16%, 5%, respectively; Twitter: 31%, 25%, 18%, 6%, respectively). WhatsApp, Facebook, and YouTube use skew younger as well, but by smaller margins because the oldest nationals (45+) are more likely to use them than other platforms (WhatsApp: 48% 45+ year-olds vs. 76% 18-24 year-olds, 74% 25-34 year-olds, 70% 35-44 year-olds; Facebook: 35% vs. 75%, 73%, 67%, respectively; YouTube: 24% vs. 65%, 60%, 49%, respectively).

Nationals who worry about governments checking what they do online are more likely to use Facebook than those who are not worried, but less likely to use WhatsApp or Instagram (Facebook: 75% worried vs. 66% not worried; WhatsApp: 71% worried vs. 79% not worried; Instagram: 34% worried vs. 42% not worried).

News and entertainment on social media

Use of social media for news and entertainment



Bubble size proportionate to penetration rate of each platform.
Base: Nationals, users of each social media platform.

MEDIA USE IN THE MIDDLE EAST, 2017
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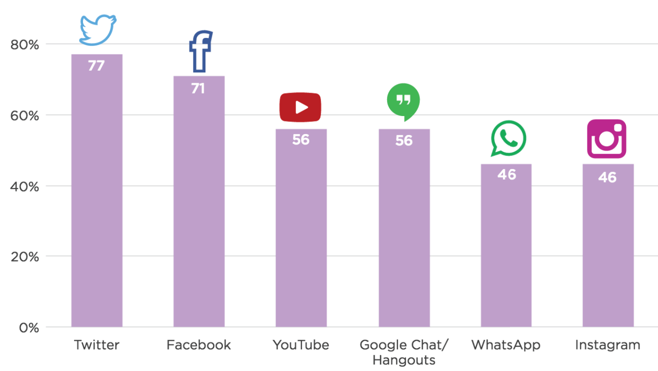
Top social media platforms to get/share news about current events



Base: Users of each platform.

MEDIA USE IN THE MIDDLE EAST, 2017
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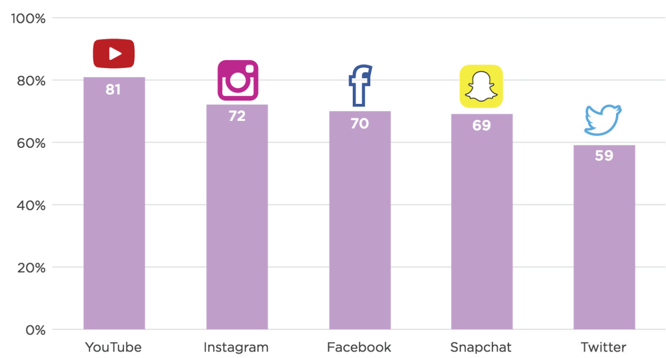
Snapchat, Instagram, and YouTube are used more often for entertainment purposes than for news. Among platform users, at least seven in 10 use Snapchat, Instagram, and YouTube to get or share entertainment, while only half or less use these platforms to get or share news content (Snapchat: 69% entertainment vs. 41% news; Instagram: 72% entertainment vs. 46% news; YouTube: 81% entertainment vs. 56% news). Twitter is used more than any other platform to get and share news, followed by Facebook (77% Twitter, 71% Facebook vs. 56% YouTube, 46% WhatsApp, 46% Instagram, 41% Snapchat). However, six in 10 also use Twitter to get and share entertainment content (59%).

Most nationals use WhatsApp but primarily for communicating with others rather than for getting or sharing news or entertainment content (96% communication vs. 46% news, 51% entertainment).

Facebook is used by nationals at a high rate for all purposes: 89% communication, 71% news, and 70% entertainment.

Nearly eight in 10 Twitter users use the service for news regardless of their age (72% 18-24 year-olds, 78% 25-34 year-olds, 83% 35-44 year-olds, 81% 45+ year-olds). The same is true for entertainment consumption on YouTube across age groups (81% 18-24 year-olds, 82% 25-34 year-olds, 81% year-olds, 78% 45+ year-olds).

Top social media platforms to get/share entertainment content



Base: Users of each platform.

MEDIA USE IN THE MIDDLE EAST, 2017
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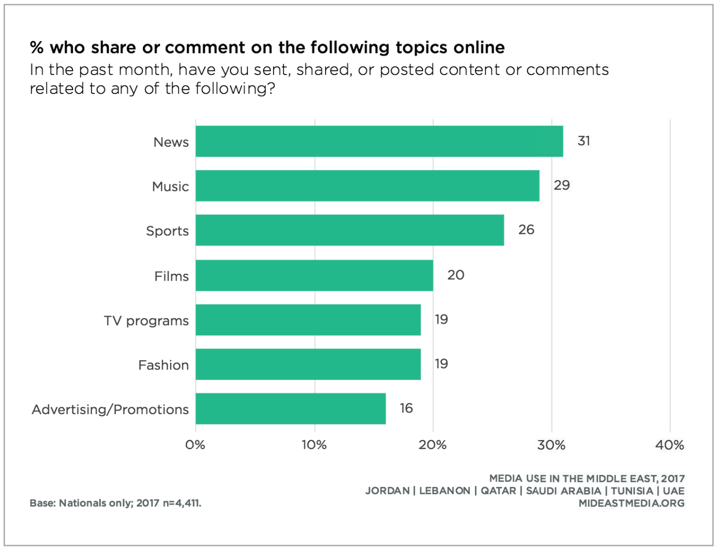
Three-quarters or more of all nationals use social media to interact with others: 80% see what friends are family are doing, 76% post messages/comments via messaging, 82% get messages via messaging, 76% post messages/comments via social media, 77% get messages via social media, 77% post/share their own multimedia content, 77% re-post/share others' links or content.

These same activities are performed by about 50% to 70% of all nationals on a daily basis (64% see what friends are family are doing, 54% post messages/comments via messaging, 70% get messages via messaging, 53% post messages/comments via social media, 62% get messages via social media, 48% post/share their own multimedia content, 47% re-post/share others' links or content).

Among internet users, these rates jump to nine in 10 doing these activities at all and between one-half and three-quarters doing them every day (do daily: 76% see what friends and family are doing, 64% post messages/comments via messaging, 84% get messages via messaging, 64% post messages or comments via social media, 75% get messages via social media, 57% post/share their own multimedia content, 56% re-post/share others' links or content).

The similarities in online activity across countries are more striking than the differences with only a few exceptions. A greater proportion of internet users in Saudi Arabia and Tunisia share their own or re-post others' content on a daily basis, while less do so in Qatar (post own multimedia content daily: 68% Tunisia, 65% KSA vs. 41% Qatar; re-post/share others' content daily: 71% Tunisia, 66% KSA vs. 36% Qatar).

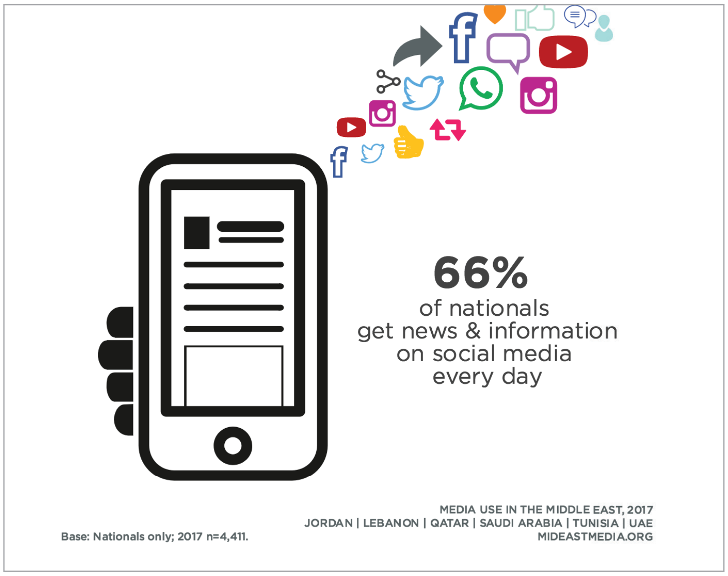


Younger internet users engage in a wide variety of social media activities on a daily basis at much higher rates than their oldest counterparts (45+). The only exception is checking what family and friends are doing on a daily basis, which all age groups do in roughly equal proportions (77% 18-24 year-olds, 77% 25-34 year-olds, 76% 35-44 year-olds, 72% 45+ year-olds). Older internet users are least likely to post or get messages or to post or share their own multimedia content on social media on a daily basis (post messages: 46% 45+ year-olds vs. 70% 18-24 year-olds, 69% 25-34 year-olds, 61% 35-44 year-olds; get messages: 61% vs. 82%, 77%, 71%, respectively; post or share their own multimedia content: 43% vs. 65%, 59%, 53%, respectively).

In terms of what content people share online, no specific type of content stands out. In a given month, 20% or fewer share about film, TV, fashion, or advertising. However, sports, news, and music are more broadly shared and at similar rates (26% sports, 29% music, 30% news/current events).

Large majorities of nationals in Saudi Arabia, the UAE, and Lebanon have shared at least some content online in past month, compared with six in 10 in Qatar, Jordan, and Lebanon (92% KSA, 89% UAE, 80% Lebanon vs. 64% Qatar, 60% Jordan, 60% Tunisia). Overall, Saudis are most likely to share online about all of the topics presented.

Social media and direct messaging have become go-to sources for news and information. Eight in 10 nationals get at least some news via these online channels, and two-thirds turn to these sources for news *every day* (at all: 79% social media, 82% direct messaging; daily: 66% social media, 68% direct messaging). Emiratis and Qataris are the most likely to turn to direct messages for news daily (87% UAE, 80% Qatar); Emiratis and Saudis are the most like to choose social media for daily news (83% UAE, 76% KSA).



Social media and direct messaging are both deemed important sources for news and information—seven in 10 agree—but still at a lower rate than for TV (83% TV vs. 70% social media, 69% instant/direct messaging). Qatar and the UAE are the only two countries where all three news sources are rated as important by similar proportions of nationals.

Since 2015, the portion of nationals finding social media and direct messaging as important news sources increased significantly in Lebanon, Tunisia, and the UAE, by up to 20 percentage points (Lebanon: 14 percentage point increase for social media, 12-points for direct messaging; Tunisia: 16-points for social media, 20-points for direct messaging; UAE: 7-points for social media, 11-points for direct messaging).

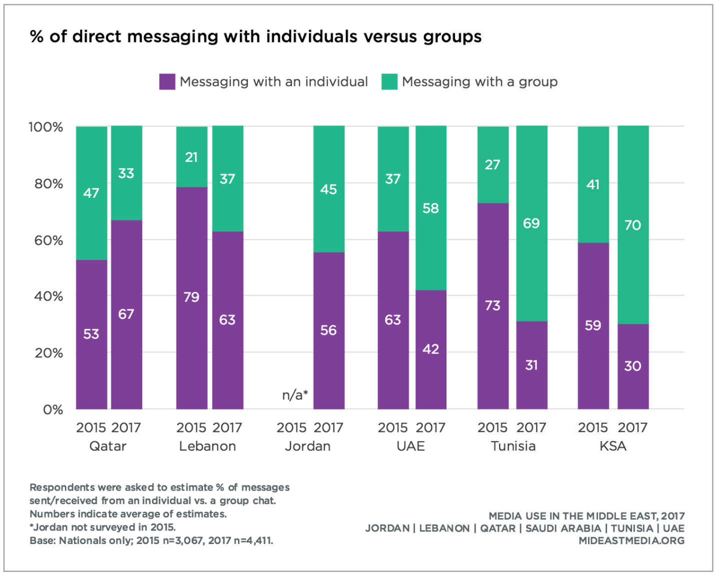
Despite broad use of social media for news and information and the broad support for it as an important source, *trusting* news from social media is less certain. Less than half say they trust news on social media and one-third do not trust this news (47% great deal/fair amount of trust vs. 32% not very much/no trust at all). Nationals from Lebanon, Saudi Arabia, and the UAE are more likely to trust social media news than those from other countries (58% Lebanon, 56% KSA, 56% UAE vs. 40% Jordan, 36% Tunisia, 35% Qatar).

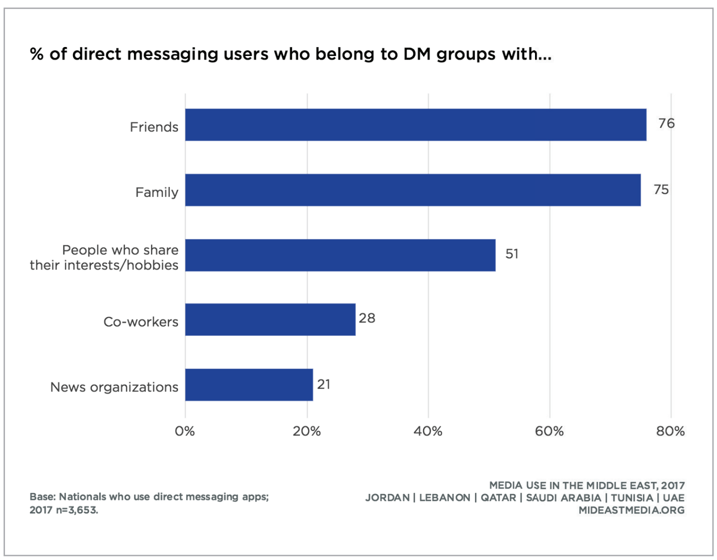
The broadest trust among nationals for complete, accurate, and fair news coverage is for both mass media in general and for mass media in their own country—two-thirds trust these sources—while about half trust other mass media in the Arab world, media from Western countries, or social media (66% trust mass media in general, 66% mass media in their own country vs. 52% mass media in the Arab world outside their country, 49% mass media in Western countries, 47% social media).

Arab Nationals who trust mass media in general are also more trusting of news on social media—at a rate of two to one over those who do not trust the mass media (trust news on social media: 59% trust general mass media vs. 24% do not trust).

Nationals worried about governments checking their online activity are less likely to trust mass media news than those who are not worried, but more likely to trust news from social media (trust mass media: 66% worried vs. 71% not worried; trust social media news: 54% worried vs. 48% not worried).

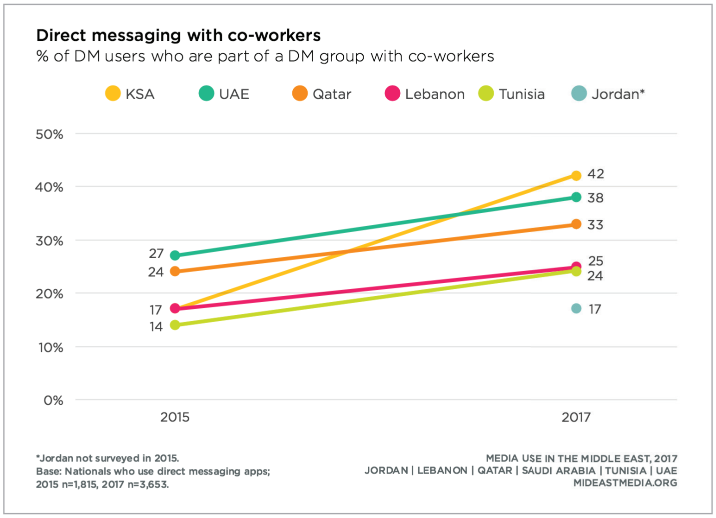
Group messaging

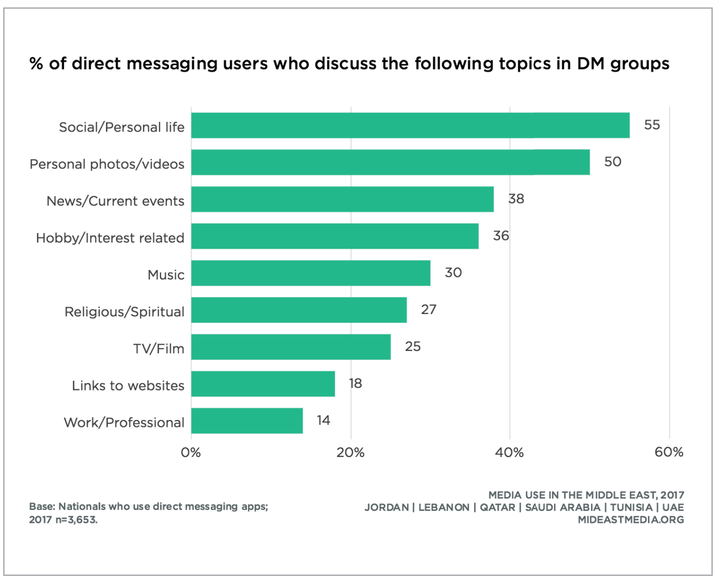




The proportion of direct messaging (DM) with groups compared to individuals shifted dramatically since 2015. Currently, half of direct messages sent and received are in group chats and half are between individuals. This represents a significant increase in group messaging—an increase of 15 to 42 percentage points in all countries except Qatar. Qatar is the only country where group messaging decreased since 2015 (by 14 percentage points) to one-third of all direct messaging. The majority of direct messaging is with groups in Saudi Arabia, Tunisia, and the UAE (70% KSA, 69% Tunisia, 58% UAE vs. 45% Jordan, 37% Lebanon, 33% Qatar).

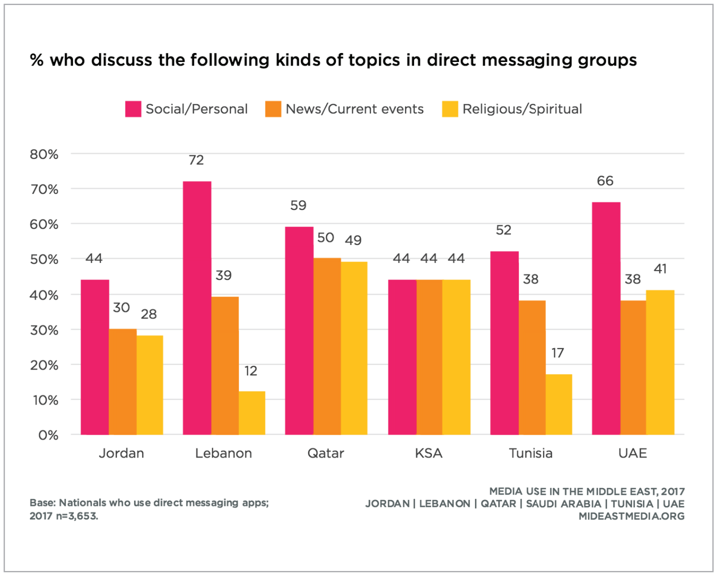
Friends and family are the most popular DM groups. Three-quarters of nationals belong to a friend or family DM group and one-half belong to a DM group with people sharing similar interests and hobbies. Co-worker and news organization groups are less popular (28% co-workers, 21% news organizations). Family and friend groups are popular in all countries, but Saudis, Emiratis, and Tunisians are far more likely to participate in DM groups with people sharing common interests and hobbies (75% KSA, 69% UAE, 55% Tunisia vs. 40% Jordan, 39% Lebanon, 29% Qatar).



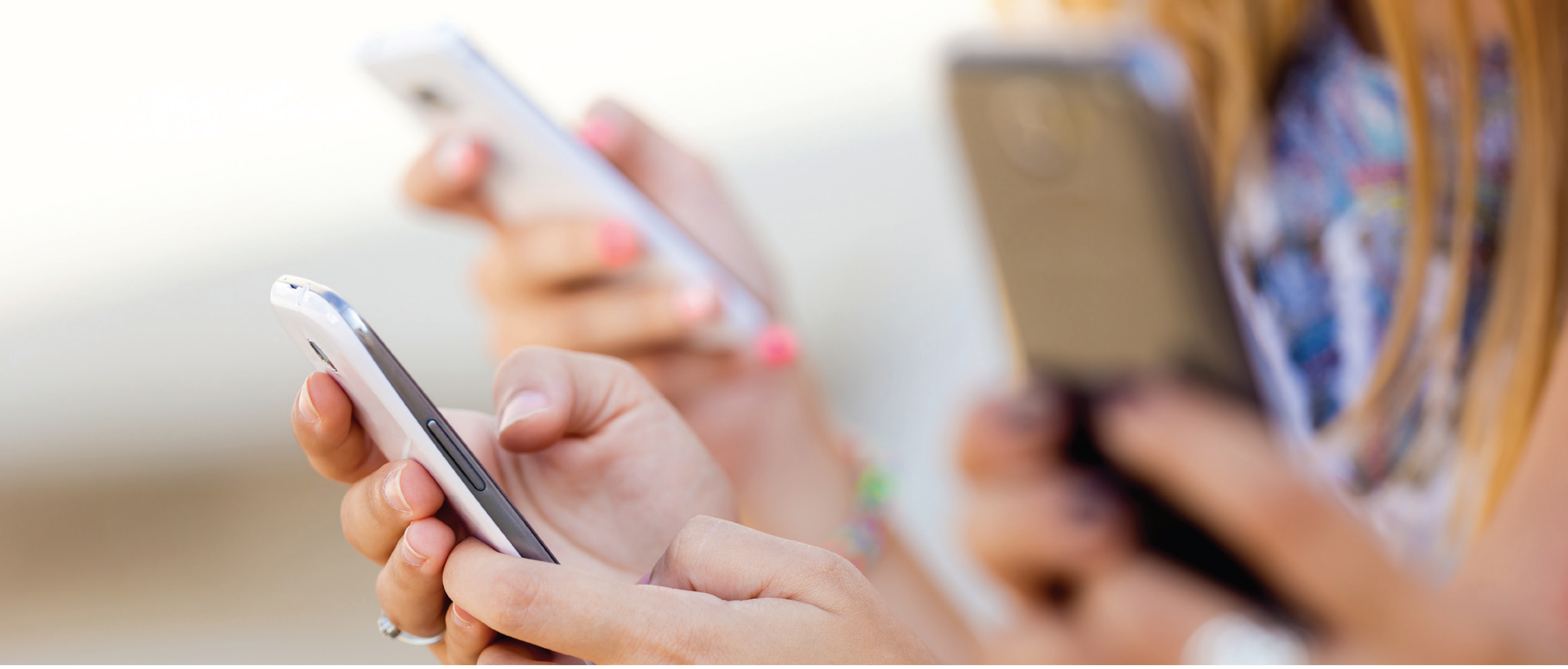


While co-worker groups are not very popular among DM users as a whole, they are popular among employed individuals. Over six in 10 employed individuals belong to a co-worker group, ranging from half in Lebanon, Jordan, and Tunisia to nine in 10 in Saudi Arabia (63% regional average, 52% Lebanon, 54% Jordan, 55% Tunisia, 60% Qatar, 73% UAE, 91% KSA).

Nationals are most likely to share personal information in DM groups, including both social/personal information and personal photos and videos. About half of direct message users share this type of information (55% social/personal life, 50% personal photos/videos). Only one-quarter share information about religion, TV, or films in group chats. However, one-third of DM users share about news and current events, their hobbies and interests, or about music in group chats (38% news/current events, 36% hobbies/interests, 30% music).



As with most social media activities, the oldest cohort (45+) is less likely than younger nationals to share about most topics in DM groups, with two notable exceptions. Among direct message users, all age groups share religious content and news and current events at similar rates (religious content: 24% 18-24 year-olds, 29% 25-34 year-olds, 28% 35-44 year-olds, 26% 45+ year-olds; news/current events: 37%, 41%, 43%, 33%, respectively).



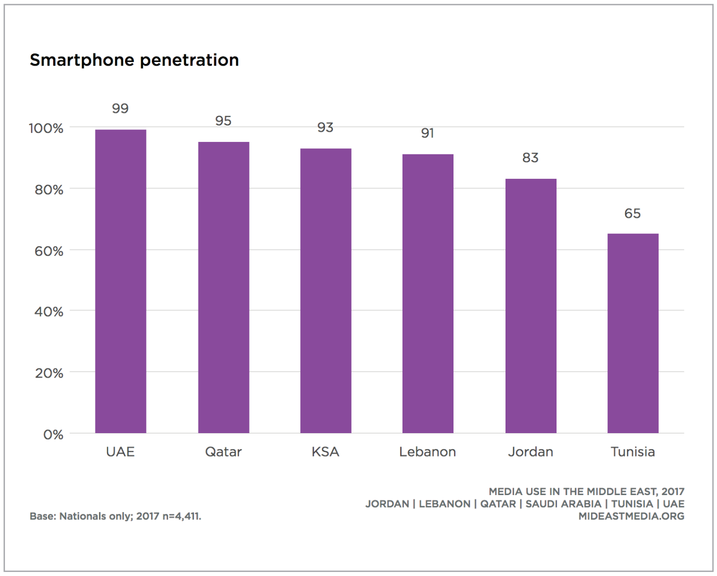
MOBILE

People who check news on their smartphone every day are also more likely to check news on other platforms daily.

In this chapter

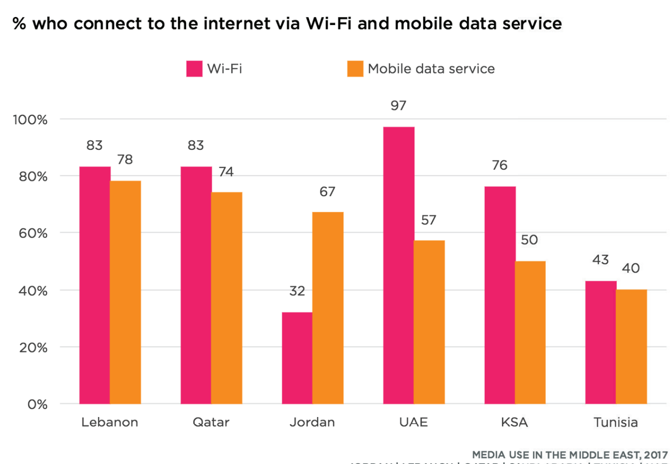
- Smartphone connections
- Getting news via smartphone

Smartphone connections



At least nine in 10 nationals in Lebanon, Qatar, Saudi Arabia, and the UAE own a smartphone as do 83% of nationals in Jordan and 65% in Tunisia. More than nine in 10 nationals under 45 years old own a smartphone compared to six in 10 of nationals 45 years or older, dropping to only one-quarter among nationals over 65 years old (under 45: 93%; 45-65: 62%, over 65: 26%).

Only one-third of the least-educated respondents (primary or less) own a smartphone, much lower than nationals of all other education levels (33% primary or less vs. 79% intermediate, 90% secondary, 97% university or higher). This holds true even among older, yet highly educated, nationals. Smartphone ownership rises with education within each age group. Among the youngest group (18-24), less than two-thirds of nationals who have a primary education own a smartphone compared with all of those who are university-educated (61% primary or less vs. 100% university or more). Even among those 45 and older, nearly nine in 10 of the most educated group own a smartphone compared with only only two in 10 of the least educated group (20% primary or less vs. 87% university or more).

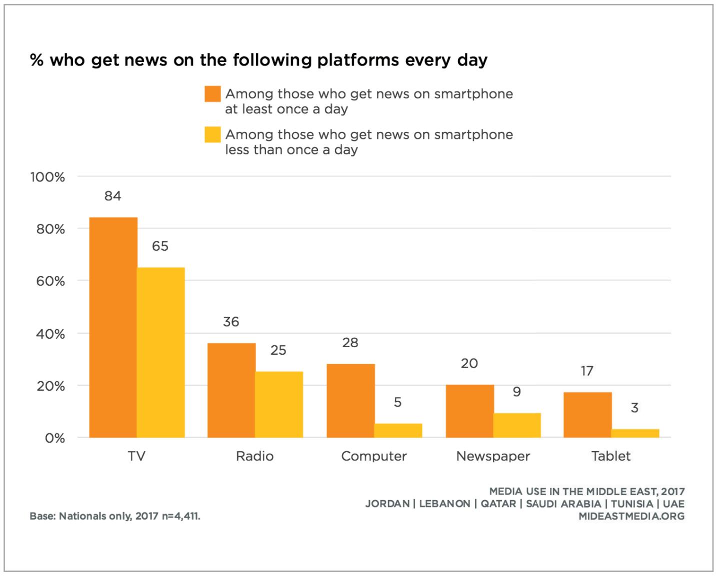


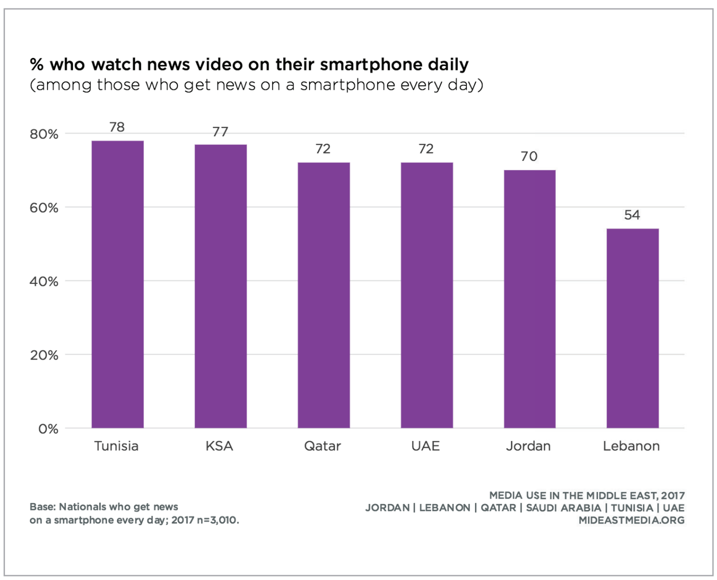
Base: Nationals only; 2017 n=4,411.

Modest gender differences in smartphone ownership exist only in Jordan, Saudi Arabia, and Tunisia (six to nine percentage points), although significant majorities of both men and women own smartphones in all countries (Jordan: 86% men vs. 80% women; KSA: 98% men vs. 89% women; Tunisia: 69% men vs. 61% women; Lebanon: 90% men vs. 92% women; Qatar: 95% each; UAE: 100% men vs. 99% women).

Nearly three-quarters of internet users across the region use Wi-Fi or mobile data services to connect to the internet (74% Wi-Fi, 72% mobile data service). However, Wi-Fi use varies by country, from less than half of Jordanians to two-thirds of Tunisians and nine in ten across the other nations (40% Jordan vs. 63% Tunisia, 91% Lebanon, 87% Qatar, 84% KSA, 97% UAE). Significantly fewer nationals in Saudi Arabia, Tunisia, and the UAE use a mobile data service, which is the primary connection in Jordan (55% KSA, 59% Tunisia, 58% UAE vs. 84% Jordan, 85% Lebanon, 78% Qatar).

Getting news via smartphone





Most nationals get news on a smartphone and do so every day (77% at all, 67% daily). Using smartphones to get news on a daily basis is especially high in Saudi Arabia and the UAE (80% KSA, 90% UAE). Majorities in the other countries get news on their smartphones on a daily basis as well (74% Jordan, 59% Lebanon, 59% Tunisia, 58% Qatar).

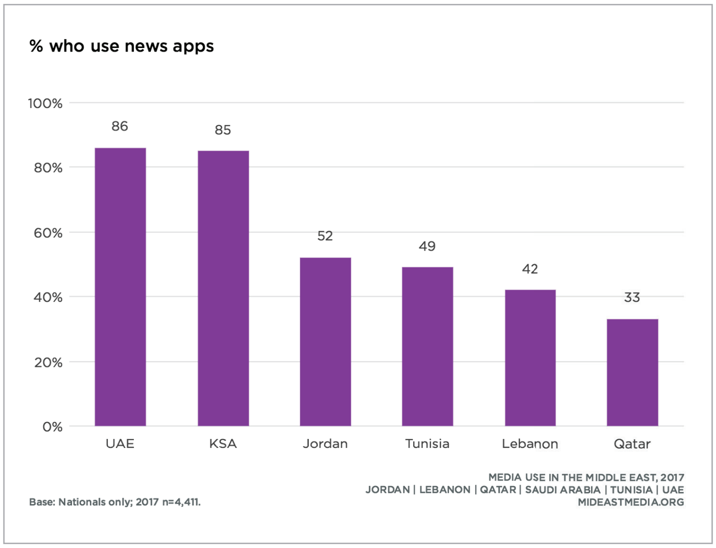
The oldest and least educated nationals are the least likely to get news daily on a smartphone (41% 45+ year-olds vs. 76% 18-24 year-olds, 78% 25-34 year-olds, 73% 35-44 year-olds; 17% primary or less vs. 34% intermediate, 51% secondary, 62% university or more). Checking news on a smartphone every day varies little by gender (70% men vs. 65% women).

Nationals who get news via smartphone at least once a day are also more likely to get news via other platforms—both digital and offline—on a daily basis.

Seven in 10 nationals watch news videos on their smartphone, and half watch them daily (69% at all, 48% daily). Lebanon is the exception with just one-third of respondents watching news videos every day on a smartphone (34% Lebanon vs. 52% Jordan, 43% Qatar, 63% KSA, 46% Tunisia, 65% UAE). Among those who get daily news on a smartphone, the proportion also watching news videos on their phone daily jumps to seven in 10 (70%).

Watching news videos on a smartphone is less common among older nationals (45+ year-olds), women, and those less educated. Nationals 45 years and older are half as likely as younger respondents to watch news videos on a smartphone every day (27% 45+ year olds vs. 53% 18-24 year-olds, 57% 25-34 year-olds, 54% 35-44 year-olds).

The disparity by education is great, with the least educated nationals (primary or less) watching news videos on a smartphone daily at rates two to three times less than their more educated counterparts (17% primary or less vs. 34% intermediate, 51% secondary, 62% university or more).



Just over half of nationals use news apps, and just over one-quarter use them daily (55% at all, 28% daily). Using news apps is most popular in Saudi Arabia and the UAE and least popular in Qatar (use at all: 85% KSA, 86% UAE vs. 52% Jordan, 49% Tunisia, 42% Lebanon, 33% Qatar).

Those who check news on a smartphone every day are not exclusively using news apps; 74% of daily smartphone news consumers use news apps and only 40% use them daily.

Half of nationals say news apps are an important source of news and information, similar to the proportion using news apps at all (55% use at all, 50% say news apps are an important news source). Only one-third of Jordanians and Qataris view news apps as an important source for news compared to more than 50% of nationals in the other countries (34% Jordan, 34% Qatar vs. 57% Lebanon, 54% KSA, 51% Tunisia, 78% UAE). While 85% of Saudis use news apps, only 54% say they are an important source for news, a 31-point difference. Similarly, 52% of Jordanians use news apps and only 34% say they are important, an 18-point difference. Comparatively, 42% of Lebanese use news apps, but 57% say they are important.

Changes in the perceived importance of news apps since 2015 are mixed; a smaller proportion of Lebanese, Qataris, and Saudis rate them as important compared with 2015, while a greater proportion of Emiratis and Tunisians rate news apps as important in 2017 (Lebanon: 57% in 2017 vs. 65% in 2015; Qatar: 34% in 2017 vs. 44% in 2015; KSA: 54% in 2017 vs. 58% in 2015; UAE: 78% in 2017 vs. 70% in 2015, Tunisia: 51% in 2017 vs. 39% in 2015).

Nationals who say consuming news from foreign media outlets is beneficial are more likely to rate news apps as an important source for news and information—by 10 percentage points over those disagreeing with the benefits of foreign news outlets (news apps are important: 58% agree foreign news is beneficial vs. 45% disagree).

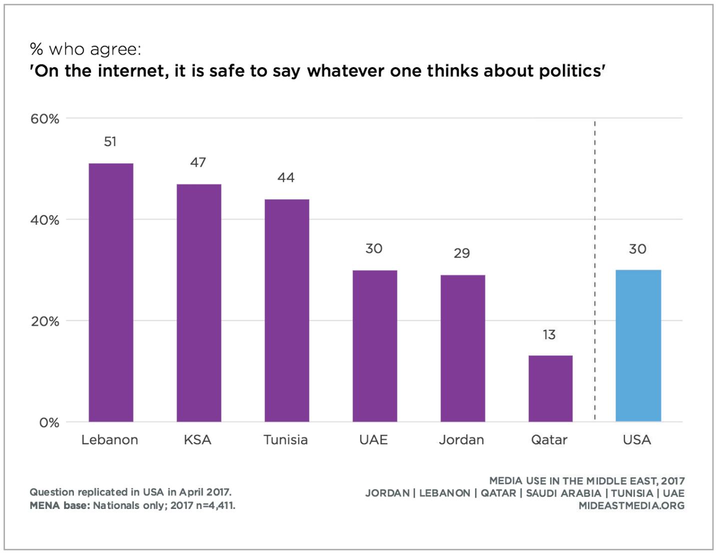
FREE SPEECH

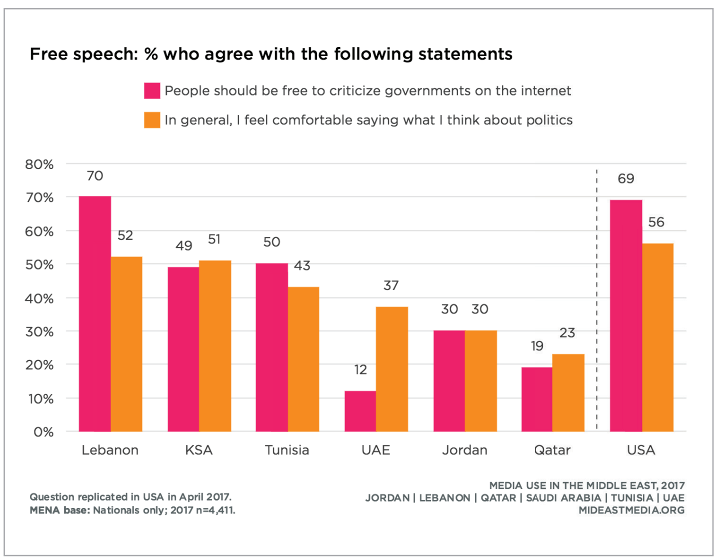
Nationals are less likely to support restrictions on speech criticizing government policies than they are of speech that is offensive to one's religion or beliefs.

In this chapter

- Free speech online
- Online surveillance
- Online political efficacy
- Internet regulation
- Restriction of speech

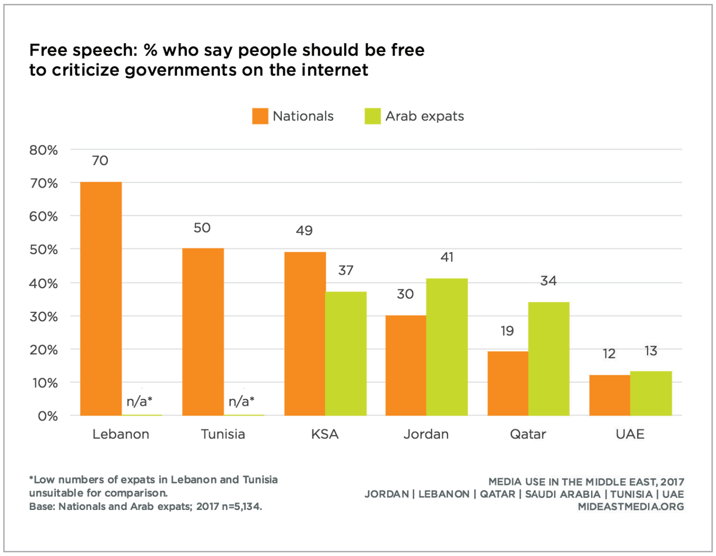
Free speech online





Nearly half of nationals say it is okay for people to express their ideas on the internet even if they are unpopular (48%) and that people should be free to criticize government online (46%). Fewer—four in 10—feel it is safe to say whatever one thinks about politics on the internet.

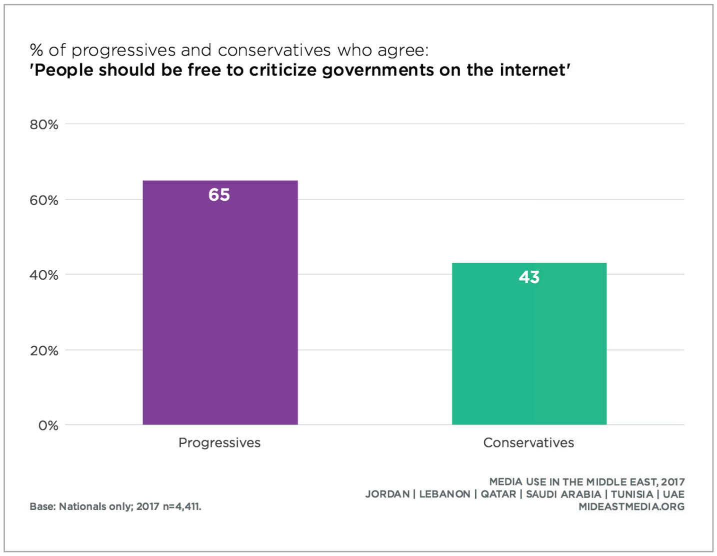
Opinions about free speech online—what people should be able to say versus what they can safely say—vary widely by country. In Lebanon, for example, far more nationals believe people should be able to criticize government online as feel it is safe to say what one thinks about politics online (70% okay to criticize government online vs. 51% safe to express political opinions online), while Emiratis are twice as likely to say it is safe to talk about politics online than to agree people should be able to criticize government online (12% okay to criticize government online vs. 30% safe to express political opinions online). Qataris are less likely than most other nationals to agree with either statement (19% okay to criticize government online, 13% safe to express political opinions online).



More Western expatriates than other groups in the region say it is okay to express unpopular ideas online (56% Western expats vs. 49% Asian expats, 44% Arab expats, 48% Nationals). In contrast, more nationals feel citizens should be able to criticize government online, by seven to 16 percentage points across groups (46% Nationals vs. 30% Arab expats, 39% Asian expats, 38% Western expats). Nationals and Western expatriates are more likely than Arab and Asian expatriates to say they feel safe discussing politics online (42% Western expats, 40% Nationals vs. 34% Asian expats, 30% Arab expats).

More Americans than Arab nationals say people should be able to criticize government online—by 23 percentage points (46% Middle East vs. 69% U.S.; U.S. data: Harris Poll, 2017). However, fewer Americans say it is safe to express political opinions online (40% Middle East vs. 30% U.S.; U.S. data: Harris Poll, 2017). Lebanese are more similar to Americans than other Arab nationals in the belief that people should be able to criticize government online, with seven in 10 in agreement.

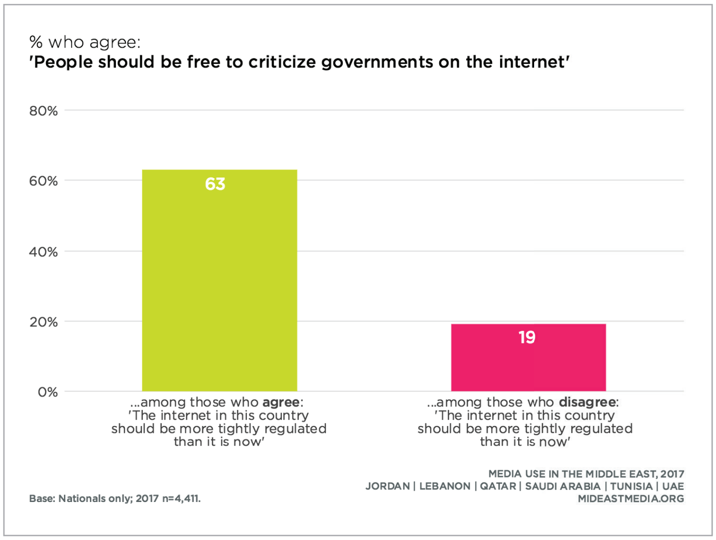
Across the region, those with the lowest education (primary or less) are the least likely to agree people should be able to express unpopular ideas, criticize government, or speak their minds about politics online—by about 20 percentage points compared to those with more education (express unpopular ideas online: 28% primary or less vs. 47% intermediate, 51% secondary, 51% university or higher; criticize government online: 24% vs. 46%, 49%, 50%, respectively; safe to express political opinions online: 20% vs. 38%, 43%, 43%, respectively).

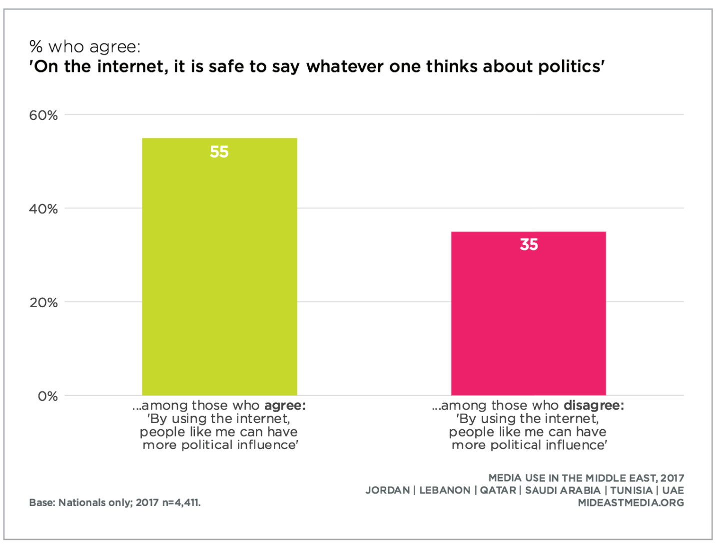


Fewer of the oldest nationals agree people should be able to express unpopular ideas, criticize government, or speak their minds about politics online—by 10 to 15 percentage points compared to their younger counterparts (express unpopular ideas online: 53% 18-24 year-olds, 50% 25-34 year-olds, 48% 35-44 year-olds, 38% 45+ year-olds; okay to criticize government online: 49%, 49%, 49%, 39%, respectively; safe to express political opinions online: 44%, 42%, 43%, 32%, respectively).

Nationals who describe themselves as progressive rather than conservative align with greater online speech freedoms for these same questions (expressing unpopular ideas online: 55% progressive vs. 46% conservative; safe to express political opinions online: 47% progressive vs. 40% conservative). Even more progressives than conservatives say it is okay to criticize government online—a difference of more than 20 percentage points.

Additionally, more of those who say their country is off on the wrong track support online freedom of speech by about 10 percentage points compared to those who feel their nation is headed in the right direction. More than or nearly half who say their country is off on the wrong track also say it is okay for people to express unpopular ideas online and that such expression is safe (express unpopular ideas online: 57% wrong track vs. 45% right direction; safe to express political opinions online: 47% wrong track vs. 38% right direction). The greatest difference between these groups concerns support for criticizing government online, growing to a nearly 20-point difference between nationals feeling their country is off on the wrong track versus headed in the right direction.



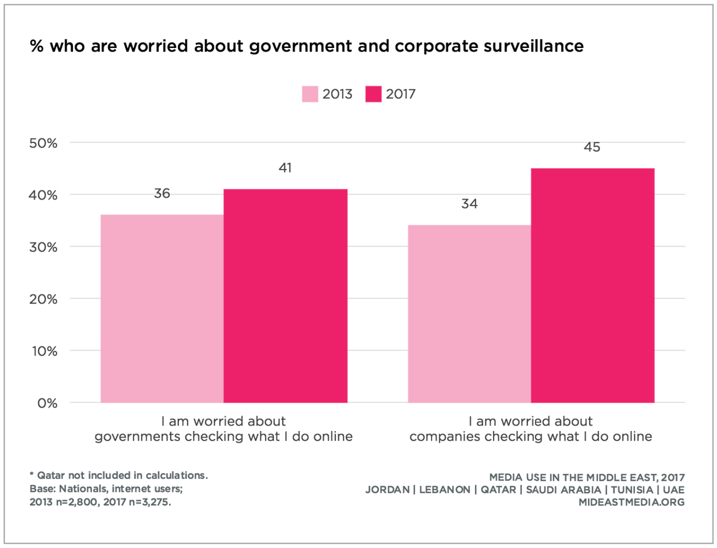


More than twice as many nationals who agree that they feel comfortable speaking about politics support the right to criticize government online compared to those who disagree (okay to criticize governments: 71% agree they feel comfortable discussing politics online vs. 31% disagree). Similarly, among nationals worried about governments checking what they do online, nearly three-quarters support the right to criticize government online—double the proportion who are not concerned about government surveilling their online activity.

Nationals who want more internet regulation in their country are three times more likely than those who do not support more regulation to say people should be able to criticize government online.

Respondents who say the internet affords them greater political efficacy are also more likely to support online freedom of speech than those who do not see the internet as increasing political influence. They are more likely to say it is okay to express unpopular ideas online (60% agree they can have political influence online vs. 45% disagree), to say people should be able to criticize government online (60% vs. 44%), and to feel it is safe to express political opinions online (55% a vs. 35%).

Online surveillance



About four in 10 internet users are concerned about either governments or companies monitoring what they do online. While fear of government surveillance is up only a few percentage points since 2013, there has been a significant increase (11 percentage points) in concern about being monitored by companies.[1]

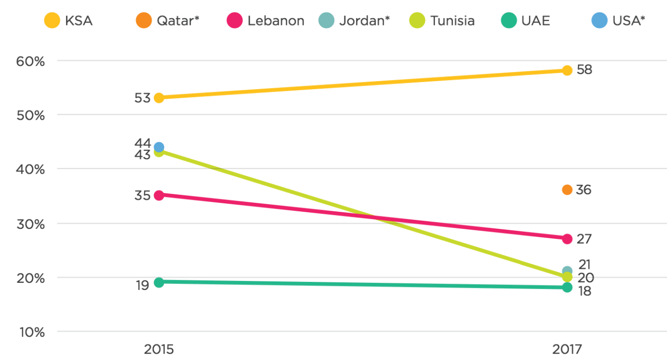
Across nations, the lowest levels of concern were reported by internet users in Qatar and the UAE, where fewer than 20% worry about governments and only 20% to 25% worry about companies monitoring their online activity, compared to the highest rates—around 50%—concerned about surveillance by both governments and companies in Saudi Arabia and Tunisia.

While younger nationals are more likely to support free speech online, higher percentages of younger nationals also express concerns about online monitoring by governments and companies (governments: 27% 45+ year-olds vs. 35% 18-24 year-olds, 39% 25-34 year-olds, 38% 35-44 year-olds; companies: 28% vs. 41%, 43%, 42%, respectively).

1. Trended data for worry about government and companies checking what I do online do not include Qatar because the question was worded differently in Qatar in 2013.

Online political efficacy

% of internet users who agree:
'By using the internet, people like me can have more political influence'



*Data not available for Qatar and Jordan 2015, USA 2017.
USA data from World Internet Project.
MENA base: Nationals, internet users;
2015 n=1,995, 2017 n=3,755.

MEDIA USE IN THE MIDDLE EAST, 2017
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

Three in 10 internet users believe they can have more political influence by being online. Internet users in Saudi Arabia and Qatar are the most likely to feel they can have influence (58% KSA, 36% Qatar vs. 18% UAE, 21% Jordan, 21% Lebanon, 20% Tunisia). This represents a sharp decline from 2013 in perceptions of political influence online in Jordan, Lebanon, Tunisia, and the UAE (Jordan: 26 percentage point drop; Lebanon: 10-point drop; UAE: 18-point drop).

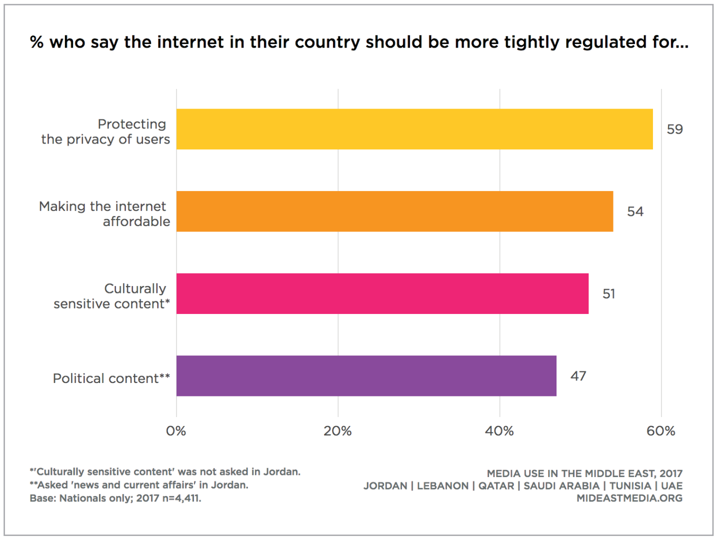
Among internet users, Western and Asian expatriates are more likely than Arabs to feel they can have more political influence by being online (39% Asian expats, 45% Western expats vs. 30% Nationals, 29% Arab expats).

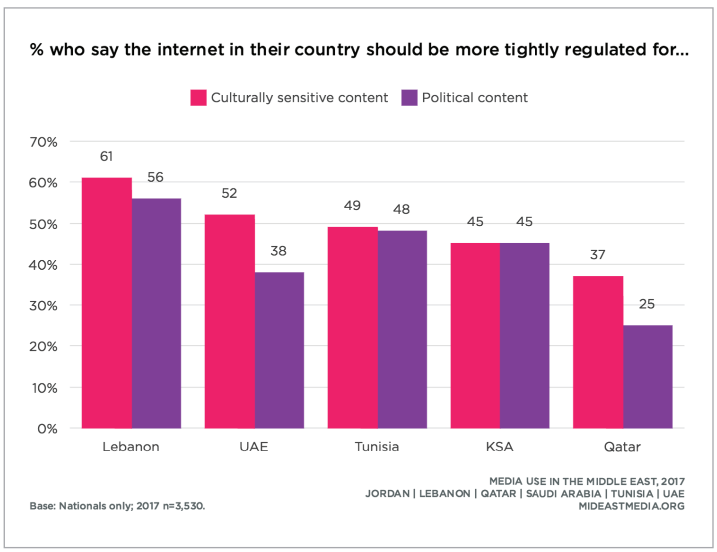
The proportion of nationals who feel they can have political influence on the internet varies little by age but rises with education (17% primary or less, 21% intermediate, 31% secondary, 33% university or higher).

Nationals who see their country heading in the right direction are more likely to see greater political efficacy in the internet (34% right direction vs. 22% wrong track).

Arab nationals who agree with free speech online and feel comfortable discussing politics online are also more likely to feel they can have political influence by using the internet (can have more political influence online: 34% agree it is okay to express ideas on the internet vs. 19% disagree; 38% agree they feel comfortable discussing politics vs. 19% disagree).

Internet regulation





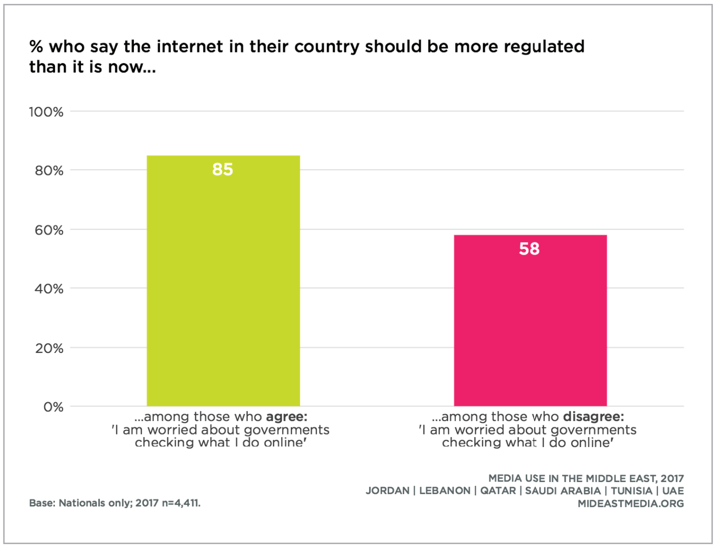
Overall, support for internet regulation is on the rise, up seven percentage points since 2013 (53% in 2013 vs. 60% in 2017). This rise across the Middle East reflects increases in Jordan, Lebanon, and the UAE (Jordan: 43% in 2013 vs. 57% in 2017; Lebanon: 63% vs. 77%; UAE: 29% vs. 41%). Otherwise, support for tighter internet regulation stayed roughly the same in Saudi Arabia and Tunisia and fell dramatically in Qatar (KSA: 59% in 2013 vs. 57% in 2017; Tunisia: 51% vs. 56%; Qatar: 60% vs. 39%).

Qatar and the UAE are the only nations where minorities of nationals favor greater internet regulation (39% Qatar, 41% UAE).

Roughly half of nationals support tighter internet regulation for political content, culturally sensitive content, and cost (making sure the internet is affordable), while close to six in 10 support tighter regulation to protect the privacy of online users.

Compared with other nationals, fewer Qataris support tighter internet regulation related to content (political and culturally sensitive), but they favor tighter regulation concerning privacy and affordability at rates similar the other nationals. Lebanese show the highest rates supporting tighter regulation, ranging from 56% for political content to over three-quarters for protecting user privacy and making the internet affordable (75% protecting user privacy, 78% making the internet affordable).

Compared to expatriate groups, more nationals favor a general increase in internet regulation (60% Nationals vs. 41% Arab expats, 36% Asian expats, 36% Western expats). However, the proportions supporting specific types of regulation (content, cost, and privacy) are more similar across nationalities, with Arab expatriates generally expressing the least support for the various forms of regulation.

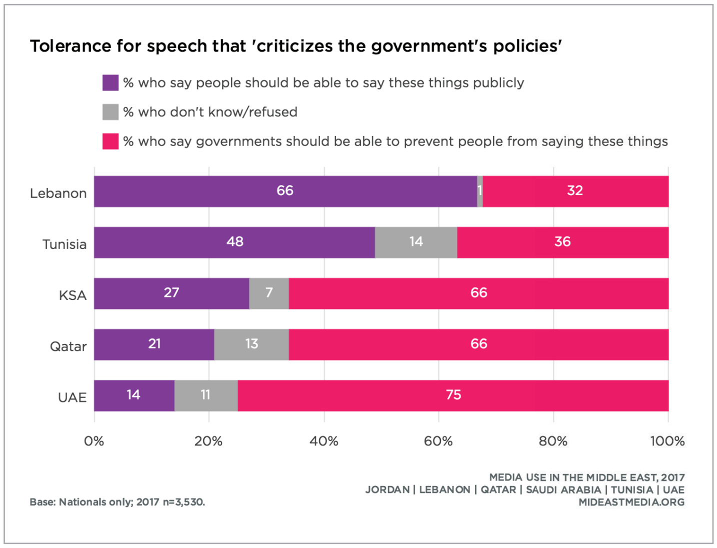


Fewer of the least-educated internet users support internet regulation, by about 20 percentage points, compared to those with more than a primary education. Half of the least-educated group want more internet regulation compared to two-thirds of those with more education (51% primary or less vs. 69% intermediate, 65% secondary, 67% university or higher). Similarly, only one-third of the least-educated internet users support more regulation of political content, compared to half of those with more education (34% primary or less vs. 47% intermediate, 50% secondary, 54% university or higher).

Respondents who worry about governments checking what they do online favor all forms of increased internet regulation in greater proportions than those who are not worried. This likely highlights their likely definition of “internet regulation” in terms of more online protections as opposed to favoring increased censorship or more restrictions of online speech (increase regulation to protect user privacy: 73% worry vs. 61% do not worry; increase regulation to make the internet affordable: 67% worry vs. 55% do not worry; increase regulation of political content: 63% worry vs. 44% do not worry; increase regulation of culturally sensitive content: 66% worry vs. 49% do not worry).

Support for increased regulation to protect user privacy and content is more common among those who agree that the internet affords more political influence online than those who disagree (support increased regulation to protect user privacy: 70% agree people have more political influence online vs. 60% disagree; for political content: 58% agree vs. 49% disagree; for culturally sensitive content: 62% agree vs. 51% disagree).

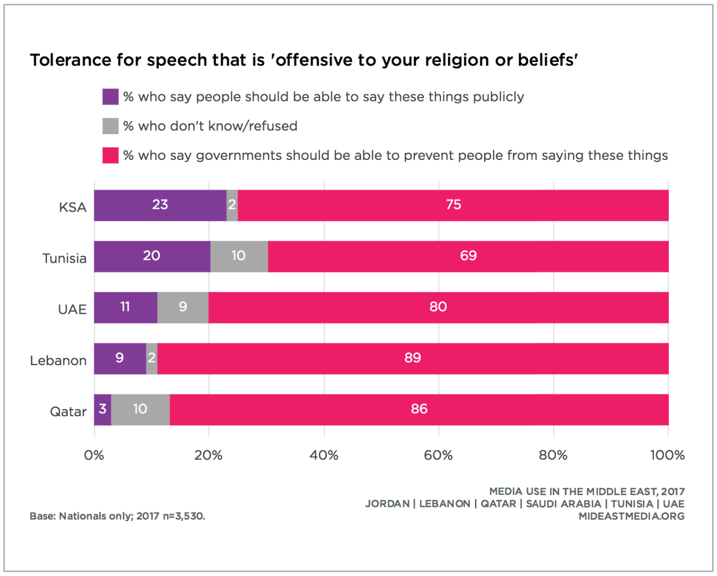
Restriction of speech

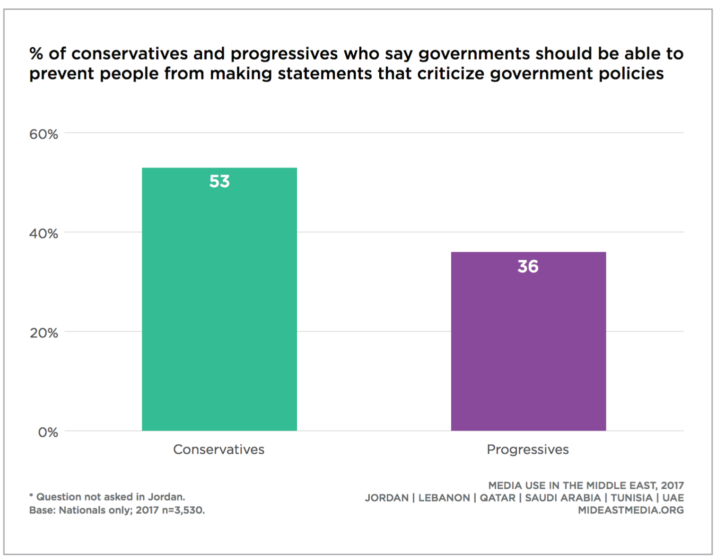


Respondents were asked if they think people should be able to speak publicly about various topics or if the government should be able to prevent people from speaking on these subjects. The topic areas included: statements that criticize the government's policies, statements that are offensive to one's religion or beliefs, and statements that are offensive to minority groups.

Three times as many nationals think people should be able to publicly criticize the government's policies than should be allowed to make offensive statements about one's religion and beliefs or about minorities. The large majority, over three-quarters of nationals, agrees the government should have the right to prevent free speech offensive to religion and minorities, as opposed to only about half who support official censorship of government policies.

Variations by country emerge. Two-thirds of Lebanese support a right to publicly criticize government policies and just one-third say the government has the right to prevent such critiques. Qatar, Saudi Arabia, and especially the UAE represent the opposite end of the spectrum, with about one-quarter of Qataris and Saudis and only 14% of Emiratis believing people should have the freedom to criticize government policies. Two-thirds of Qataris and Saudis and three-quarters of Emiratis think the government should be able to prevent public criticism.





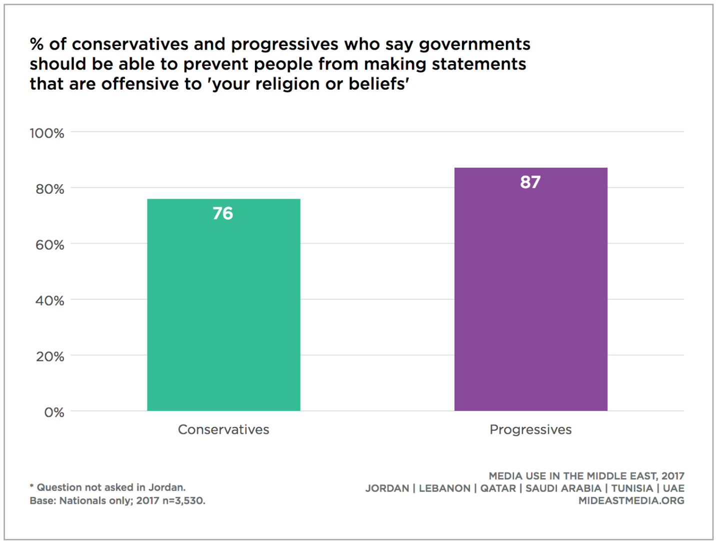
Less than one in five nationals believe fellow citizens should be able to publicly offend others' religion or beliefs, and three-quarters say government should be able to block such speech. Only a few more Saudis and Tunisians than other nationals are comfortable with public statements offensive to their religion, while less than one in 10 Lebanese and Qataris support such speech.

Similarly, a few more Saudis and Tunisians tolerate offensive speech about minorities than the regional average (should be able to make offensive statements: 25% KSA, 21% Tunisia vs. 17% regional average; government should prevent offensive statements: 72% KSA, 68% Tunisia vs. 77% regional average).

More nationals than expatriates support the freedom to criticize the government's policies (44% Nationals vs. 31% Arab expats, 30% Asian expats, 34% Western expats). Arabs, both nationals and expatriates, are less likely than either Asian or Western expatriates to tolerate speech offensive to their religion or to minority groups (offensive speech is okay against religion or beliefs: 15% Nationals, 9% Arab expats vs. 25% Asian expats, 32% Western expats; against minority groups: 17% Nationals, 10% Arab expats vs. 22% Asian expats, 30% Western expats).

A significantly smaller portion of nationals with the least education support free speech against government policies compared to more educated respondents (35% primary or less vs. 50% intermediate, 43% secondary, 47% university or higher).

Self-identified progressives are more likely than conservatives to support the freedom to criticize government policies by nearly 20 percentage points; conservatives are more likely to feel government should be able to prevent such criticism.



However, the reverse is true concerning speech offensive to one's religion or to minorities, as only half as many progressives as conservatives support speech that offends religious beliefs. Large majorities of both progressives and conservatives support government prevention of statements offensive to one's religion or to minorities, but progressives even more so than conservatives.

More nationals who say their country is off on the wrong track rather than headed in the right direction support the freedom to publicly criticize government policies (55% wrong track vs. 40% right direction).

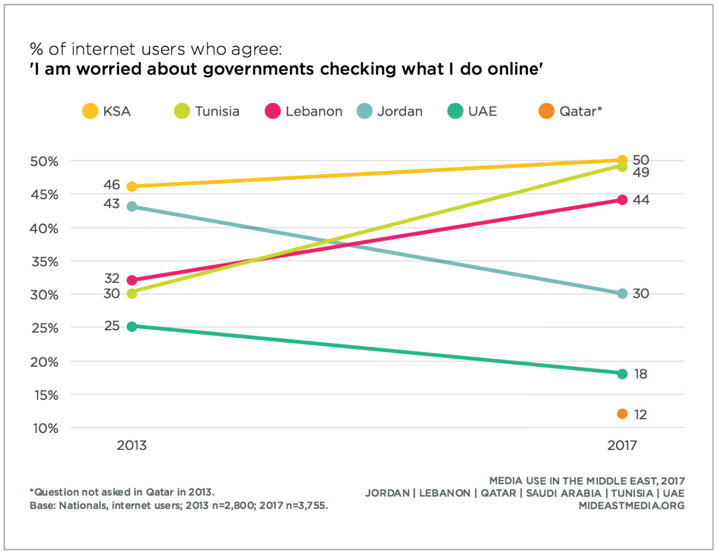
ONLINE PRIVACY

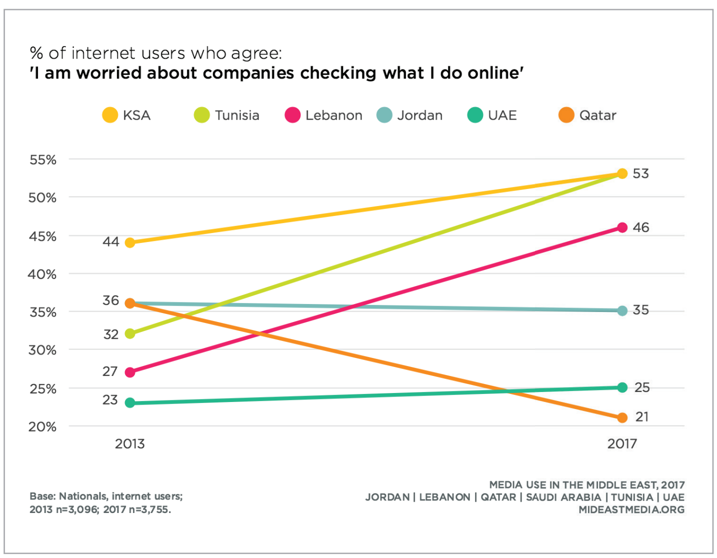
Protecting the privacy of users is the most commonly cited reason for supporting tighter regulation of the internet.

In this chapter

- Privacy concerns and online behavior
- Support for internet regulation

Privacy concerns and online behavior



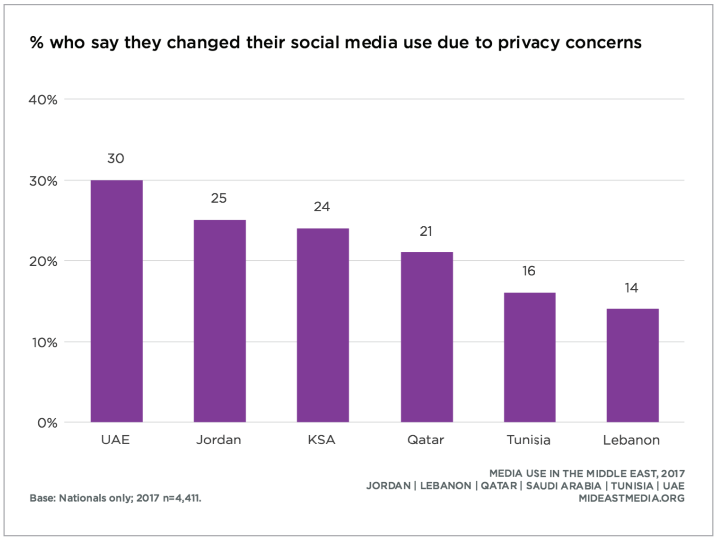


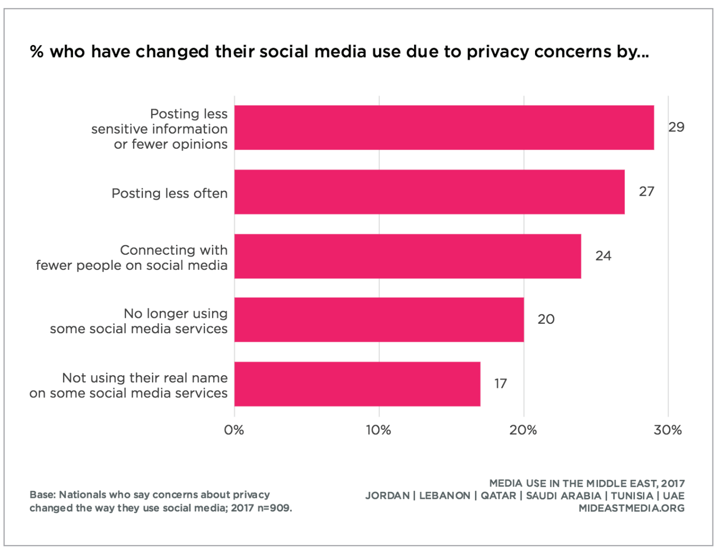
Many people think about privacy when using the internet, and in fact, a sizable minority of Arab internet users worry about governments and companies monitoring their online activity (39% government, 43% companies). Concern about companies monitoring individuals' online activity is growing at a faster pace than concern about government surveillance. Since 2013, concerns about companies checking individual online activity increased by 11 percentage points while concern about government monitoring increased by five points (companies: 34% in 2013 vs. 45% in 2017; government: 36% in 2013 vs. 41% in 2017, among internet users).[1]

Internet users in all countries express more concern about companies than governments checking what they do online. Saudis, Tunisians, and Lebanese report the highest rates of concern for both, while Jordanians, Qataris, and Emiratis have the lowest rates of concern (companies checking: 53% KSA, 53% Tunisia, 46% Lebanon vs. 35% Jordan, 25% UAE, 21% Qatar; government checking: 50% KSA, 49% Tunisia, 44% Lebanon vs. 30% Jordan, 18% UAE, 12% Qatar).

Concern about online surveillance rises with education. The most educated internet users (university or higher) are three times as likely as the least educated (primary or less) to express concern about governments and companies checking what they do online (government: 16% primary or less vs. 44% university or higher; companies: 14% primary or less vs. 39% university or higher).

1. Trended data for governments and companies checking online activity do not include Qatar because different wording was used in Qatar in 2013.





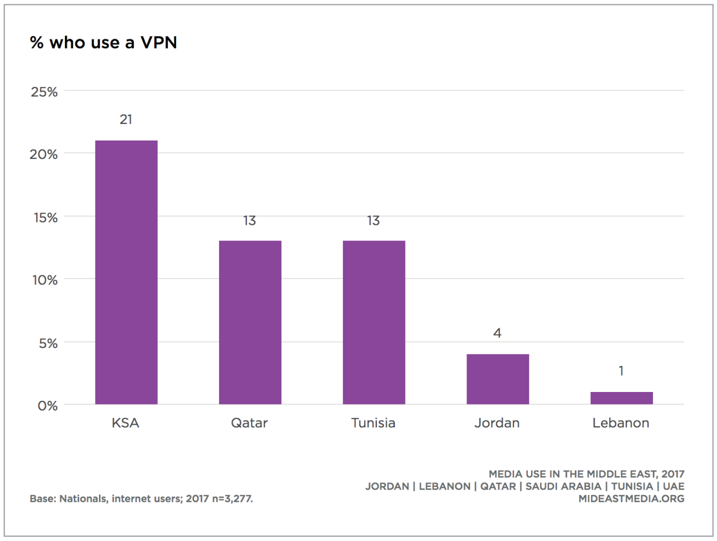
Those who advocate for more regulation of the internet are much more likely than those who do not support such regulation to express concern about online surveillance by governments and by companies—a 35 percentage point difference for both. Half of those who support more internet regulation are worried about government and corporate online surveillance, compared to only one in seven who do not support tighter regulation (government: 54% agree increased regulation vs. 15% disagree; companies: 49% agree vs. 13% disagree).

Those who agree that people can have greater political influence by using the internet are also more likely to express concern about government and corporate online monitoring compared with those who disagree—by more than 10 percentage points (government: 49% agree greater influence online vs. 37% disagree; companies: 46% agree vs. 33% disagree). Those who agree it is okay to express unpopular ideas on the internet are also more likely to be concerned about online monitoring compared with those who disagree—by nearly 20 percentage points (government: 53% agree okay to express unpopular ideas vs. 33% disagree; companies: 48% agree vs. 30% disagree).

Nationals who worry about governments checking what they do online are more likely to be Facebook users than those who are not worried but less likely to be WhatsApp or Instagram users (Facebook: 75% worried vs. 66% not worried; WhatsApp: 71% worried vs. 79% not worried; Instagram: 34% worried vs. 42% not worried).

American internet users express more concern about online surveillance by both governments and companies compared with Arab internet users. Half of American internet users worry about governments and six in 10 worry about corporations checking their online activity (2015: government: 39% Middle East vs. 49% U.S; companies: 43% Middle East vs. 60% U.S.; U.S. data: World Internet Project, 2015).[2]

2. 2015 Middle East data do not include Jordan.



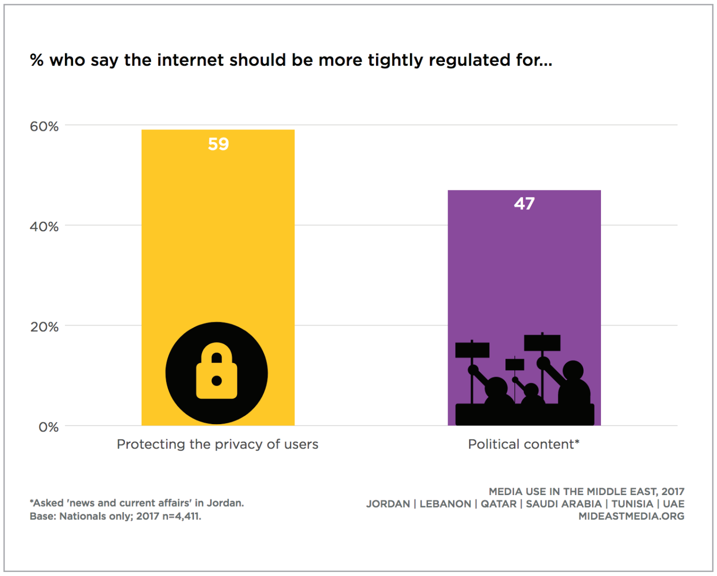
Privacy concerns have not impacted how most Arab nationals use social media; only one in five nationals say that concerns about privacy have changed the way they use social media. Jordanians and Emiratis are the most likely to say their social media behavior has changed due to privacy concerns, while Lebanese nationals are the least likely to say the same (31% Jordan, 30% UAE vs. 15% Lebanon).

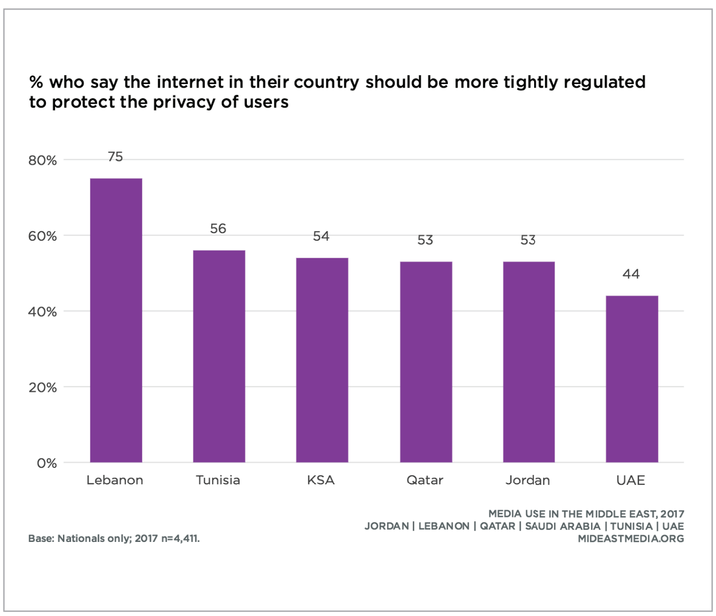
Changes in social media behavior are rare across all nationals. However, among the 23% who have made changes, the most common strategies include changing privacy settings (33%), posting less sensitive information (29%), posting less often (27%), and connecting with fewer people (24%).

Use of virtual private networks (VPN) varies widely by country. One in five internet users use a VPN in Saudi Arabia compared to almost none in Lebanon (21% KSA, 13% Qatar, 13% Tunisia, 4% Jordan, 1% Lebanon). The question of VPN use was omitted in the 2017 UAE questionnaire since its use was banned in 2016.

VPN use decreases with age (11% 18-24 year-olds, 9% 25-34 year-olds, 6% 35-44 year-olds, 3% 45+ year-olds). Long-time internet users are more likely to use a VPN than those newer to the internet (14% 10+ years online vs. 7% less than 10 years).

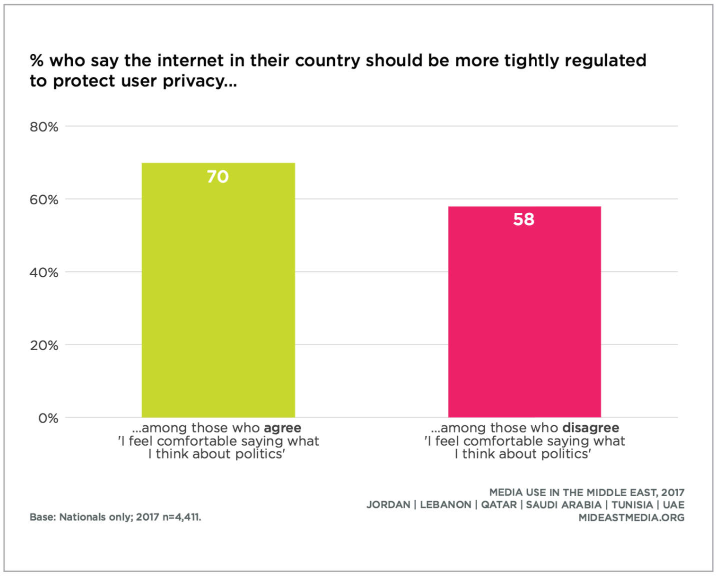
Support for internet regulation





More than half of Arab nationals feel the internet in their country should be more tightly regulated, roughly unchanged from 2013 (59% in 2013 vs. 56% in 2017). Nationals in Lebanon are twice as likely as those in Qatar and the UAE to favor greater internet regulation (80% Lebanon vs. 41% Qatar and UAE).

Drilling down into the types of regulation nationals support reveals that six in 10 believe the internet should be more tightly regulated to protect people's privacy (59%). Support for privacy regulation is highest in Lebanon and lowest in the UAE (75% Lebanon, 44% UAE). About half of Arab nationals support regulation to make the internet more affordable, for culturally sensitive content, and for political content (54% affordability, 51% cultural content, 47% political content).



Support for regulation to protect user privacy is stronger among more educated respondents. Fewer than one-third of internet users with a primary education or less favor tighter internet regulations to protect user privacy compared to nearly two-thirds of nationals with at least a university education (31% primary or less, 57% intermediary, 62% secondary, 65% university or higher).

Regulations to protect user privacy have broader appeal among nationals who feel comfortable speaking freely about politics versus those who do not—by 12 percentage points (70% agree comfortable speaking about politics vs. 58% disagree).

BIAS AND CREDIBILITY

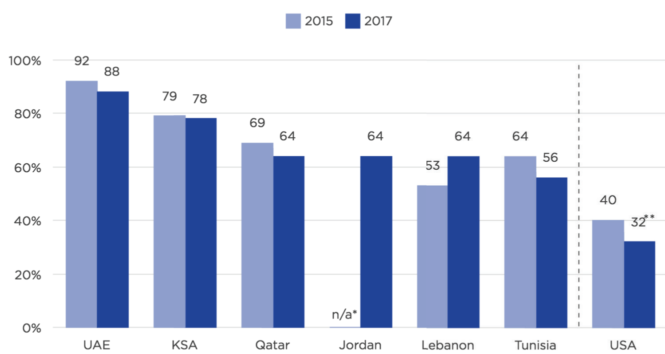
Nationals in countries surveyed are more than twice as likely as Americans to have trust and confidence in mass media.

In this chapter

- Trust in mass media
- Perceived bias
- Media independence
- Benefits of foreign news
- Gender perceptions

Trust in mass media

% who say they have trust and confidence in mass media



*Jordan not surveyed in 2015.
**USA data was collected in September 2016.
2015 and 2016 USA data from Gallup Poll:
"In general, how much trust and confidence do you have in the mass media - such as newspapers, TV, and radio - when it comes to reporting the news fully, accurately, and fairly?"
MENA base: Nationals only; 2015 n=3,067, 2017 n=4,411.

MEDIA USE IN THE MIDDLE EAST, 2017
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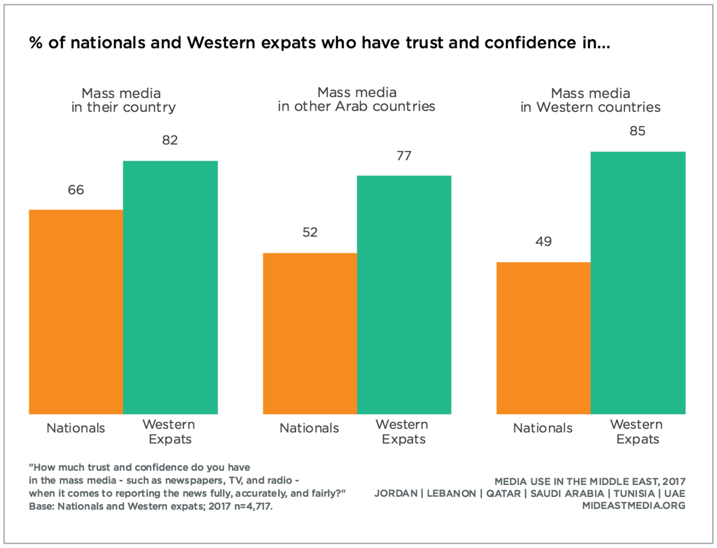
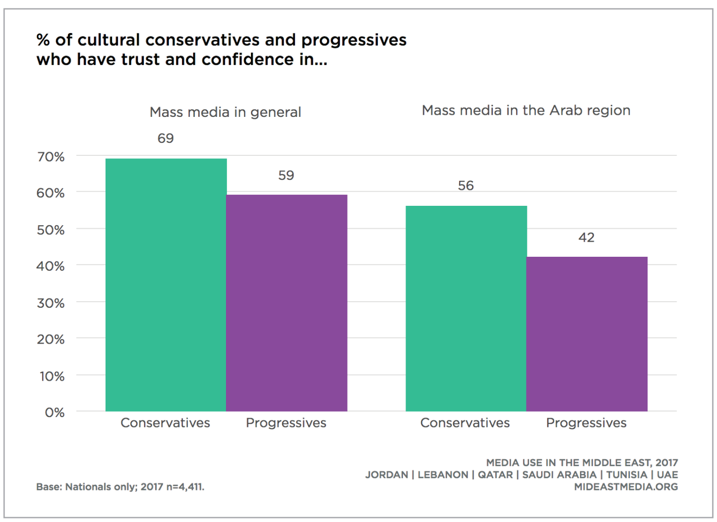
Two-thirds of Arab nationals overall say they trust mass media such as newspapers, TV, and radio to report news fully, fairly, and accurately, but there is variation by country. Ratings of media trust are very high in the UAE and Saudi Arabia and are lower—but still over half—in Tunisia (88% UAE, 78% KSA, 64% Jordan, 64% Lebanon, 64% Qatar, 56% Tunisia). In comparison, a 2016 Gallup poll revealed that just 32% of Americans trust the mass media (Gallup, 2016).

Nationals are more likely to trust mass media in their own country than to trust media from elsewhere. Two-thirds of nationals say they trust mass media from their own country, compared to only half who trust media from other Arab or Western countries (66% own country, 52% Arab world, 49% Western countries). Fewer than half trust news on social media, but this varies widely by country. More than half trust social media news in Lebanon, Saudi Arabia, and the UAE compared with about one-third in Jordan, Qatar, and Tunisia (58% Lebanon, 56% Saudi Arabia, 56% UAE vs. 40% Jordan, 35% Qatar, 36% Tunisia).

Those in Qatar and the UAE are least likely to trust news from Western countries and are even more likely to trust social media than Western media (Qataris: 35% social media vs. 28% Western media; Emiratis: 56% social media vs. 38% Western media).

Compared with 2015, more nationals in Lebanon trust mass media to report the news fully, fairly, and accurately, increasing from about one half to two-thirds (53% in 2015 vs. 64% in 2017). Conversely, trust in media declined in Tunisia (64% in 2015 vs. 56% in 2017).

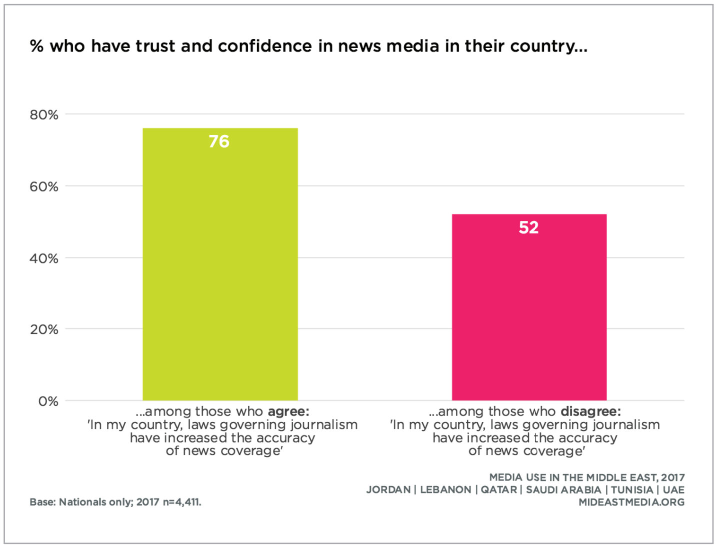




Nationals express less trust than expatriates in all mass media, including media in their own country. Eight in 10 expatriates say they trust the mass media in the country where they reside, compared to two-thirds of country nationals (66% Nationals vs. 80% Arab expats, 79% Asian expats, 82% Western expats). Arab nationals and Arab expatriates are less likely to trust mass media from Western countries compared with Asian and Western expatriates (49% Nationals, 51% Arab expats vs. 71% Asian expats, 85% Western expats).

Self-described conservative nationals are more likely than progressives to say they trust mass media in general, media in their own country, and media from the Arab world outside their country (mass media in general: 69% conservative vs. 59% progressive; own country: 69% conservative vs. 62% progressive; Arab world: 56% conservative vs. 42% progressive).

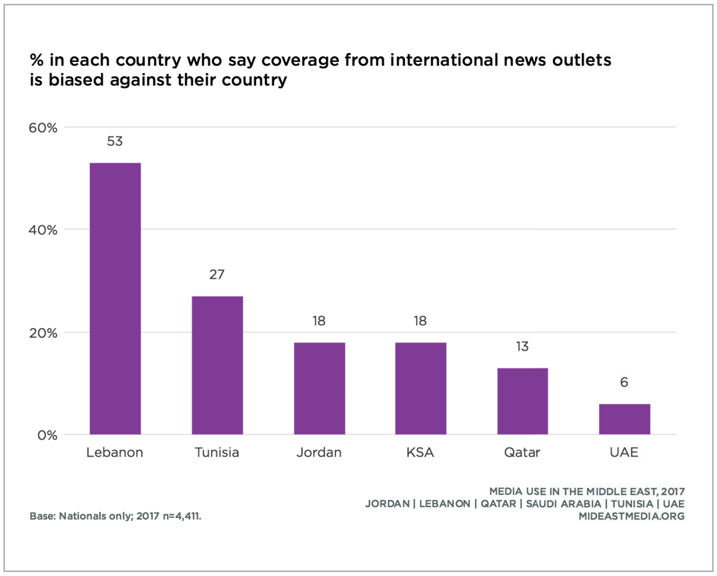
Nationals who find benefits to consuming news from foreign organizations are twice as likely as those who do not agree to say they trust mass media from Western countries (trust Western media: 60% agree in benefits of foreign news vs. 30% disagree). Those who see benefits in foreign news are also more likely to trust media from other Arab countries and from social media (mass media from other Arab countries: 56% agree vs. 41% disagree; social media: 51% agree vs. 40% disagree).



Arab nationals who say media in their country can report news without interference from officials are more likely to trust the media in their country (72% agree vs. 61% disagree). They are also more likely to trust the media from other Arab countries, from Western countries, and social media.

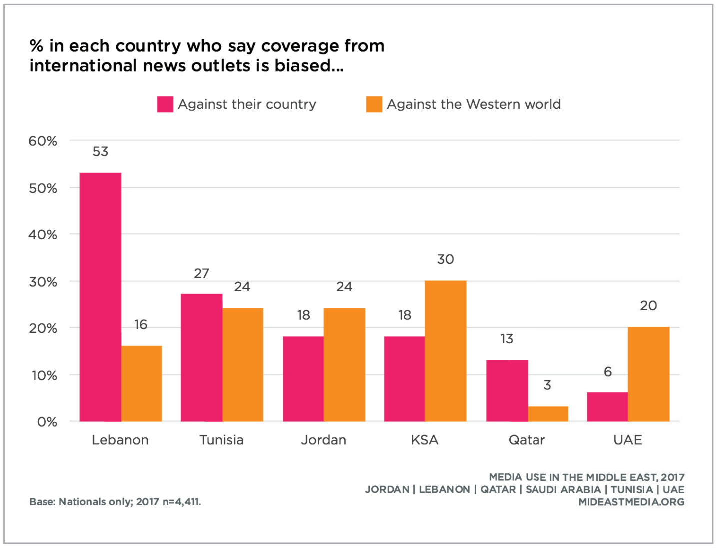
About four in 10 nationals say laws regulating journalism in their country improve the accuracy of news coverage (43%). This varies by country, however, from a high of seven in 10 in the UAE to only about one-third in Jordan. Those who feel laws in their country improve news accuracy are also more likely to trust the mass media in their country—by 24 percentage points (76% agree that laws increase accuracy vs. 52% disagree).

Perceived bias



Respondents were asked if they thought international news organizations' coverage is fair, biased against, or biased in favor of their own country, the Arab world outside their country, and the Western world. Nationals are most likely to say news coverage is biased against the Arab world followed by their own country. Fewer think coverage is biased against the Western world (33% Arab world, 28% own country, 21% Western world).

Perceptions of bias in news coverage vary widely by country. A majority of Qataris feel international news organizations' coverage of Qatar is fair (60%). Four in 10 Emiratis and Saudis say international news is fair or biased in favor of their countries, and almost no Emiratis perceive a negative bias (UAE: 42% biased in favor, 49% fair, 6% against; KSA: 40% biased in favor, 40% fair, 18% against). In contrast, more than half in Lebanon believe coverage is biased against their country (53%).



Similar patterns emerge in perceptions of international news organizations' coverage of the Arab world outside their country. Qataris are more likely than other nationals to say coverage of the Arab region is fair, while Lebanese are the most likely to feel it is biased against the Arab world.

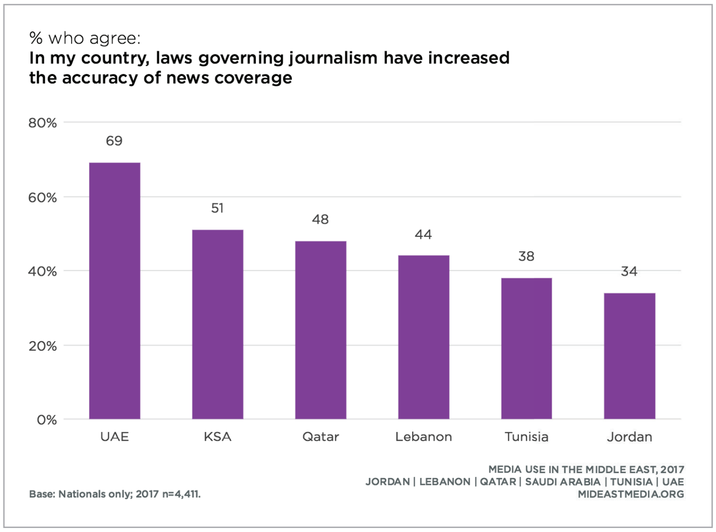
With regard to the Western world, nationals in Jordan, Saudi Arabia, and Tunisia are equally likely to say news coverage is favorable as unfavorable. Qataris are most likely to say coverage of the Western world is fair. Emiratis are twice as likely to say coverage is biased in favor of the Western world than against (43% biased in favor vs. 20% biased against). Lebanese are among the least likely to say news coverage is biased against the Western world while the most likely to say it is biased against their country and the Arab world (biased against Western world: 16%; own country: 53%; Arab world: 57%).

Cultural progressives are more likely than conservatives to say international news is biased against their country and the Arab world (biased against this country: 35% progressive vs. 26% conservative; biased against the Arab world: 40% vs. 31%).

A few notable changes in perceptions of bias have emerged since 2015. The proportion of Saudis who say news coverage is biased against their country declined from 38% in 2015 to only 18% in 2017. In all other countries, perceptions of a negative news bias increased or remained the same since 2015.

Since 2015, perception of a negative bias against the West increased in Saudi Arabia and the UAE, but declined in Qatar (KSA: 12% in 2015 vs. 30% in 2017; UAE: 8% in 2015 vs. 20% in 2017; Qatar: 26% in 2015 vs. 3% in 2017).

Media independence



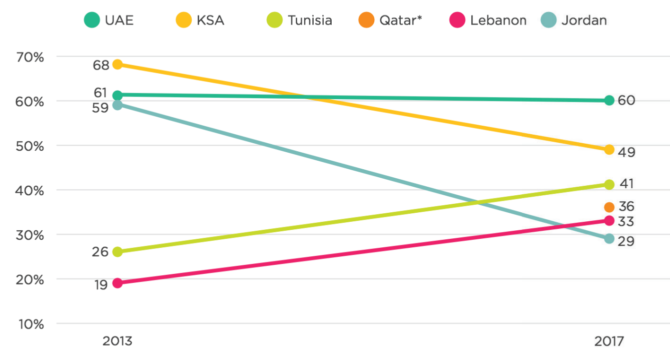
Nearly half of nationals believe news media in their country are credible (47%). About four in 10 believe that journalism laws in their country improve the accuracy of news coverage (43%) and media in their country can report news without interference from officials (38%).

Perceptions of media credibility vary considerably by country. More Emiratis, Qataris, and Saudis believe their news media to be credible than Tunisians, Jordanians, and Lebanese (85% UAE, 62% Qatari, 59% KSA vs. 45% Tunisia, 38% Jordan, 38% Lebanon). Emiratis are far more likely than other nationals to say their nation's journalism laws increase the accuracy of news coverage (69% UAE vs. 51% KSA, 48% Qatar, 44% Lebanon, 38% Tunisian, 34% Jordan).

Since 2013, perceptions of news credibility increased in most countries but fell in Jordan and Saudi Arabia (Lebanon: 25% in 2013 vs. 38% in 2017; Qatar: 57% vs. 62%; Tunisia: 23% vs. 45%; UAE: 73% vs. 85%; Jordan 66% vs. 38%; KSA: 73% vs. 59%).

The belief that media can report the news without interference from officials decreased from 2013 to 2017 in Jordan, Qatar, and Saudi Arabia, but increased in Lebanon and Tunisia (Jordan: 59% in 2013 vs. 29% in 2017; Qatar: 52% vs. 36%; KSA: 68% vs. 49%; UAE: 61% vs. 60%; Lebanon: 19% vs. 33%; Tunisia: 26% vs. 41%).

% who agree:
Media in my country can report news independently without interference from officials



*Qatar required different wording in 2013.
Base: Nationals only; 2013 n=4,587, 2017 n=4,411.

MEDIA USE IN THE MIDDLE EAST, 2017
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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Believing that laws governing journalism increase the accuracy of news varies from one-third of nationals in Jordan to nearly seven in 10 in the UAE.

A few differences emerge by nationality. A smaller proportion of nationals than expatriates view the news media in their country of residence as credible (47% Nationals vs. 66% Arab expats, 55% Asian expats, 61% Western expats). Also, nationals express skepticism more broadly than expatriates that news media in their country can report without interference from officials (26% Nationals disagree vs. 14% Arab nationals, 19% Asian expats, 15% Western expats).

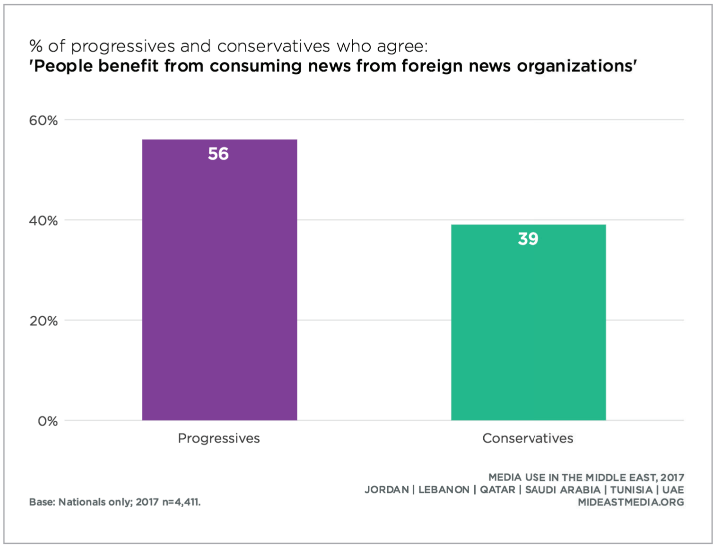
Respondents with more education are more likely to express trust in mass media (news media is credible: 43% primary or less vs. 51% university or higher; laws governing journalism increase news accuracy: 33% primary or less vs. 46% university or higher; media can report the news independently: 33% primary or less vs. 42% university or higher).

Nationals who say media in their country can report the news without interference from officials are twice as likely as those who disagree to say their news media are credible and that journalism laws have increased news accuracy (news media are credible: 68% agree vs. 31% disagree; laws increase news accuracy: 67% agree vs. 28% disagree).

Six in 10 nationals say it is okay for news to report on problems in their community with little variation across countries, slightly more agree in Qatar and the UAE and slightly less agree in Tunisia (68% Qatar, 68% UAE, 53% Tunisia).

1. The statement in Qatar in 2013 was: “The media in this country can report the news independently without interference.”

Benefits of foreign news

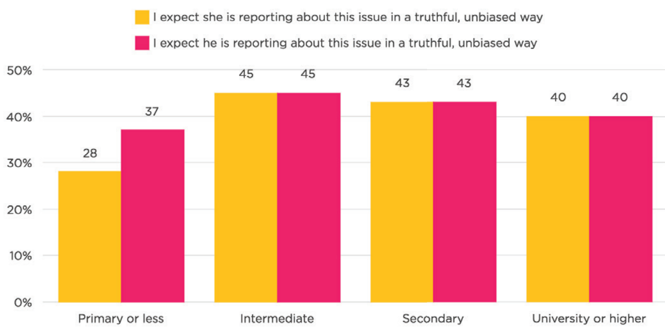


Fewer than half of nationals believe that people benefit from consuming news from foreign news organizations (43%). Lebanese, Saudis, and Tunisians are more likely to see the benefits of foreign news than Qataris, Jordanians, and Emiratis (54% Lebanon, 50% KSA, 48% Tunisia, vs. 33% Qatar, 28% UAE, 28% Jordan).

Cultural progressives are more likely than conservatives to see the benefits of consuming foreign news (56% progressive vs. 39% conservative). Belief that foreign news is beneficial increases with education level (35% primary or less, 37% intermediate, 44% secondary, 47% university or more).

Gender perceptions

Perceptions of a female/male journalist covering a story on government corruption: % who agree...



'A journalist is covering a news story about corruption in local government. The news story is about a government employee accepting bribes and stealing money. [She/He] provides [her/his] overview of the situation and [her/his] recommendations for encouraging more honest and ethical practices in local government.' Jordan not included due to different wording of scenario.
Base: Nationals only, split sample; 2017 n=3,530.

MEDIA USE IN THE MIDDLE EAST, 2017
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Respondents were randomly assigned to hear a scenario about either a male or a female journalist: *"Suppose you are watching the news. A journalist is covering a news story about corruption in local government. The news story is about a government employee who is accepting bribes and stealing money. [She/He] provides [her/his] overview of the situation and [her/his] recommendations for encouraging more honest and ethical practices in local government."*

Respondents were then asked, using a five-point agree/disagree scale, if the journalist, 1) cares strongly about the issue, 2) reports the news in a truthful and unbiased way, and 3) does not know much about the issue.

The survey revealed that the gender of the journalist does not have much impact on perceptions about the journalist. Regardless of whether the journalist was male or female, half expected the journalist cared strongly about the issue (53% female journalist, 52% male), four in 10 expected the journalist was truthful and unbiased (41% female, 41% male), and one third felt the journalist did not know very much about the issue (32% female, 33% male). This pattern of similar reactions to a male or female journalist was observed in all countries.

The least-educated nationals (primary or less) were more likely to say the male journalist cared strongly about the issue and reported about the issue in a truthful and unbiased way compared to the female journalist (cares strongly: 50% male journalist, 36% female; truthful/unbiased reporting: 37% male, 28% female).

The youngest nationals (18-24) were more likely to ascribe truthful and unbiased reporting to the female journalist than the male reporter (47% female journalist vs. 40% male), while the oldest nationals (45+) were more likely to say the male journalist cares strongly about the issue (49% female vs. 55% male).

Gender of the respondent plays a small role in perceptions. While male respondents rated the male and female journalists similarly and female respondents rated the male and female journalists similarly, female respondents rated both the male and female journalist higher on 'caring strongly about the issue' compared with male respondents (female journalist: 53% female respondents vs. 49% male respondents; male journalist: 52% female vs. 49% male). Female respondents also rated the male journalist higher than male respondents did on 'reporting the issue in a truthful, unbiased way,' but both genders rated the female journalist similarly on this attribute (female journalist: 43% female respondent vs. 41% male respondents; male journalist: 45% female vs. 39% male).

2. Jordan is not included in this data.

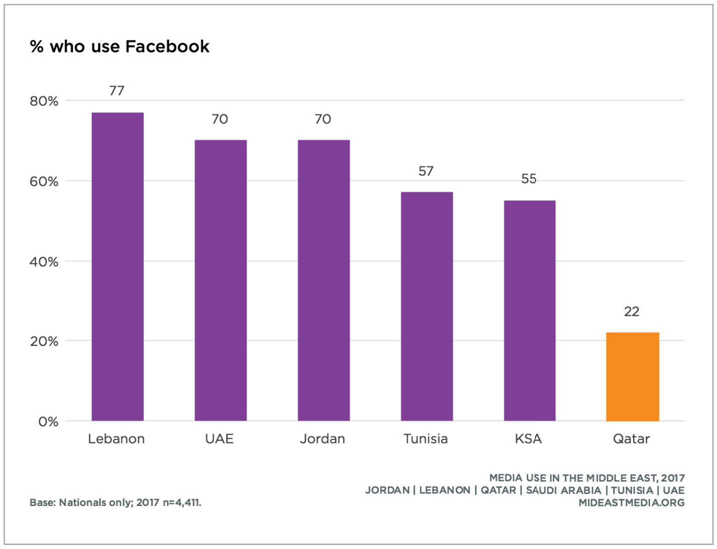
FOCUS ON QATAR

Qataris spend far more time online compared to other nationals, and are far less likely to watch news on TV.

In this chapter

- Internet and social media use
- Free speech
- Online privacy and regulation
- Perceptions of bias
- News consumption

Internet and social media use



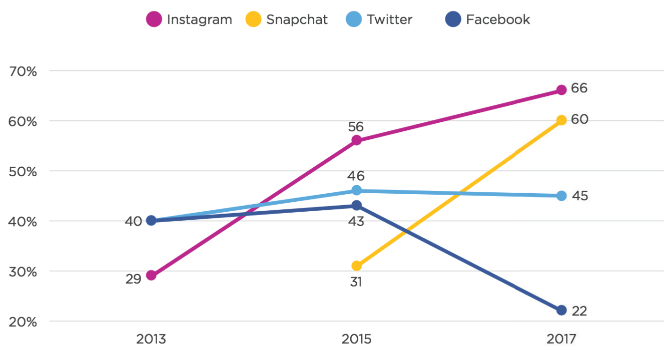
Of the six nationalities in this study, Qataris demonstrate the most unique social media use patterns. Most internet users in Qatar use WhatsApp (93%) and about two-thirds use Instagram and Snapchat (70% Instagram, 64% Snapchat). This latter percentage represents perhaps the highest Snapchat penetration of any country in the world.

However, fewer than one in four Qatari internet users use Facebook (23%), one of the lowest Facebook penetration rates among wealthy countries. Nearly half of Qatari internet users use Twitter and four in 10 use YouTube (48% Twitter, 39% YouTube). In other countries surveyed, Facebook penetration is more robust among internet users (71% UAE, 87% Jordan, 84% Lebanon, 83% Tunisia, 59% KSA). Expatriates in Qatar are also much more likely to use Facebook than Qatari nationals—by 40 percentage points (23% Nationals vs. 65% Arab expats, 80% Asian expats, 65% Western expats, among internet users).

Such low Facebook penetration among Qatari internet users reflects a significant and steady drop over time (65% in 2013 vs. 53% in 2015 vs. 23% in 2017). Other countries in this study have experienced a more modest decline in Facebook penetration since 2013.

Use of YouTube has also dropped among Qatari internet users, from 58% in 2015 to 39% in 2017, while remaining fairly stable across the region during the same period. Instagram use rose across the region since 2015, while remaining stable in Qatar. Still, more Qataris use Instagram by a wide margin (at least 27 percentage points) compared with all other nationals except Emiratis, who use Instagram at roughly the same rate. Compared with expatriates in Qatar, Qatari nationals are less likely to use YouTube but more likely to use Instagram (YouTube: 39% Nationals vs. 52% Arab expats, 73% Asian expats, 65% Western expats; Instagram: 70% Nationals vs. 44% Arab expats, 35% Asian expats, 45% Western expats, among internet users).

% who use the following social media platforms
(among Qataris)



Base: Qatari nationals;
2013 n=352, 2015 n=280, 2017 n=508.

MEDIA USE IN THE MIDDLE EAST, 2017
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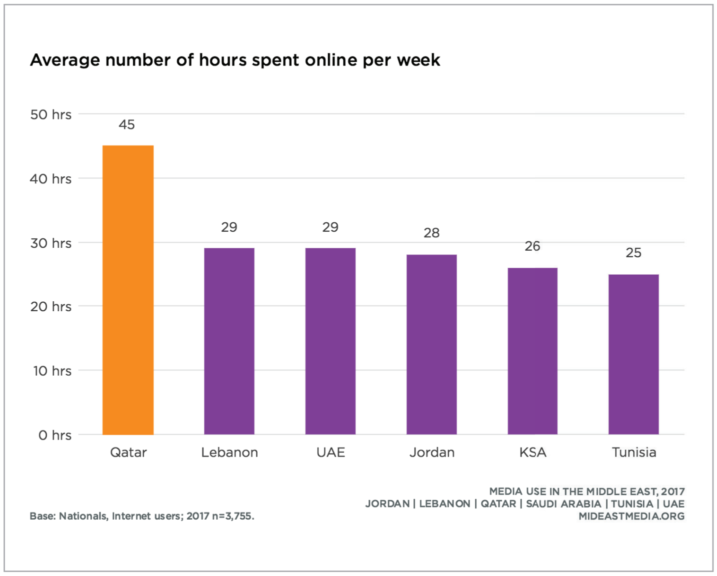
Snapchat has increased in popularity in all countries since 2015, but Qataris are still far more likely to use Snapchat than internet users from any other country (64% Qatar vs. 51% KSA, 51% UAE, 20% Lebanon, 16% Jordan, 7% Tunisia). Qatari nationals are also more likely to use Snapchat compared with expatriates in the country by a wide margin (Snapchat: 64% Nationals vs. 27% Arab expats, 25% Asian expats, 36% Western expats, among internet users).

All Qataris use direct messaging (99%). Qataris estimate that about two-thirds of their direct messaging is with individuals and only one-third is through a group chat, which is the lowest percent of group messaging across the region (group messages: 33% Qataris vs. 52% other nationals). Most Qataris belong to group chats with friends and family, similar to other nationals (Qatar: 83% friends, 86% family). Yet Qataris are less likely than other nationals—and expatriates in their country—to belong to direct messaging groups with people who have similar interests and hobbies (29% Qataris vs. 51% other nationals; in Qatar: 29% Nationals, 39% Arab expats, 41% Asian expats, 36% Western expats).

Internet penetration has risen over time and nearly all Qataris are now online (95% in 2017 vs. 85% in 2013). While internet use is lower among older Qataris—similar to other countries surveyed—eight in 10 of the oldest age group use the internet (96% 18-24 year-olds, 100% 25-34 year-olds, 97% 35-44 year-olds, 82% 45+ year-olds).



Not only are most Qataris online, they also spend a lot of time on the internet. Qataris estimate they spend an average of 45 hours per week on the internet compared with just 27 hours among other nationals. They also spend more time online than foreign nationals who live in Qatar (45 hours Nationals vs. 46 Arab expats, 41 Asian expats, 30 Western expats).

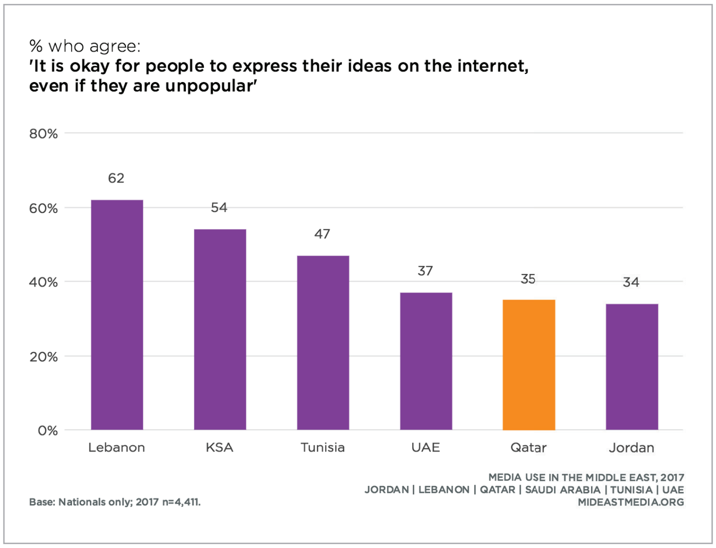
Almost all Qataris own a smartphone, more than in 2015 (94% in 2017 vs. 90% in 2015). In comparison, computer use has declined, and now fewer than half of Qataris say they connect to the internet with a computer (53% in 2015 vs. 45% in 2017). Computer use has similarly declined in all countries except Tunisia. Use of tablets also declined in Qatar, while tablet use increased or remained stable in all other countries except the UAE (Qatar: 18% in 2017 vs. 34% in 2015).

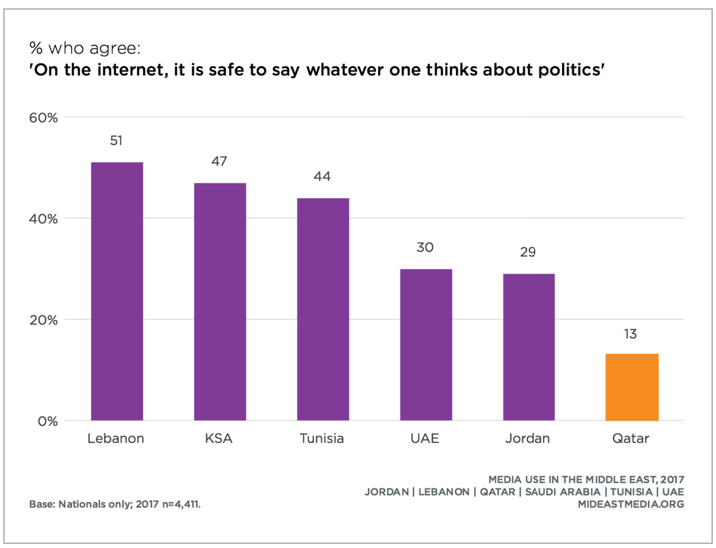
Wi-Fi and mobile data service connections are both very common in Qatar. In comparison, Saudis and Emiratis are much more likely to connect via Wi-Fi than through a mobile data service, while the opposite is true for Jordanians (Qatar: 87% Wi-Fi vs. 78% data service; KSA: 84% Wi-Fi vs. 55% data service; UAE: 97% Wi-Fi vs. 58% data service; Jordan: 40% Wi-Fi vs. 84% data service).

Qataris, along with Emiratis, spend the most time socializing with family face-to-face each week (45 hours Qatar, 45 UAE vs. 35 Jordan, 33 Lebanon, 28 KSA, 27 Tunisia). Similar to other nationals, Qataris spend far less time—13 hours per week—socializing with friends face-to-face.

Qataris spend twice as much time socializing online with friends as with family (7 hours with family vs 14 hours with friends). Other nationals, however, spend a roughly equal number of hours socializing online with family and friends.

Free Speech



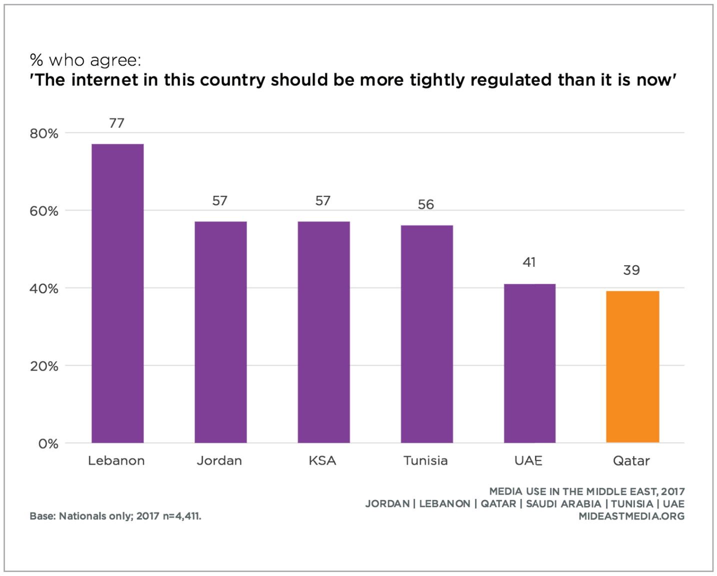


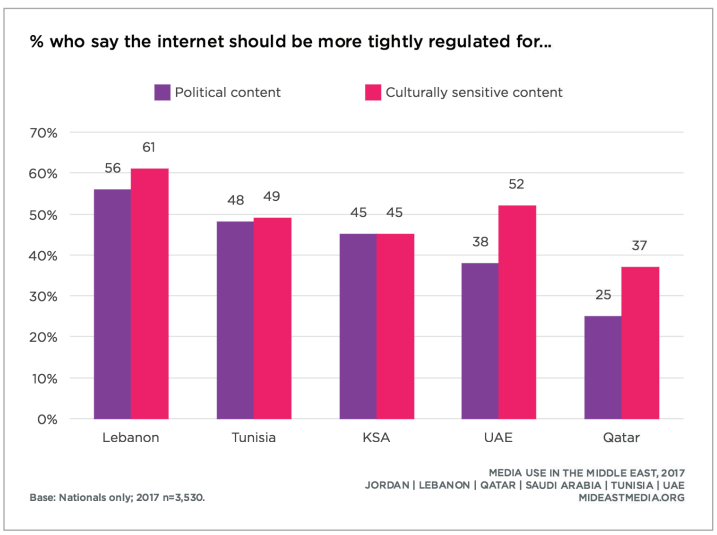
Qataris, along with Emiratis and Jordanians, are less likely than other nationals to say that it is okay for people to express unpopular ideas on the internet. Only one-third of Qataris, Emiratis, and Jordanians support such freedom of speech online.

Further, Qataris are much less likely than other nationals to say people should be able to criticize government online or that it is safe to say whatever one thinks about politics online (criticize governments: 18% Qataris vs. 48% other nationals; safe to talk about politics online: 13% Qataris vs. 42% other nationals). They are also less likely than expatriates in Qatar to agree with these statements (criticize governments: 18% Nationals vs. 34% Arab expats, 36% Asian expats, 27% Western expats; safe to talk about politics online: 13% Nationals vs. 26% Arab expats, 30% Asian expats, 21% Western expats).

Qataris are also less likely than other nationals—and expatriates in their country (especially Asian and Western expats)—to feel comfortable saying what they think about politics in general (23% Qataris vs. 44% other nationals; in Qatar: 23% Nationals vs. 28% Arab expats, 43% Asian expats, 49% Western expats).

Online privacy and regulation



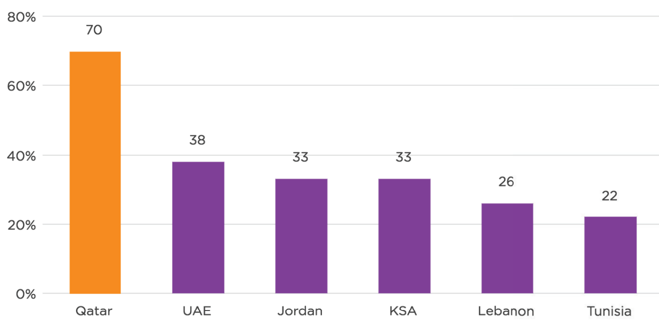


Qataris are less likely than other nationals in this study to support more internet regulation—by 22 percentage points (39% Qataris vs. 61% other nationals). This represents a nearly 30 percentage point decrease in support of internet regulation in Qatar over the past two years—the only decrease in the region (67% in 2015 vs. 39% in 2017).

Qatari nationals report a similar level of support for regulation as expatriates in their country (support more regulation: 39% Nationals vs. 33% Arab expats, 36% Asian expats, 33% Western expats).

Compared with other nationals, supporting internet regulation related to political and culturally sensitive content is less popular among Qataris, while favoring tighter regulation concerning user privacy and keeping the internet affordable is similar to other nationals surveyed (political content: 25% Qataris vs. 49% other nationals; culturally sensitive content: 37% Qataris vs. 52% other nationals; user privacy: 53% Qataris vs. 58% other nationals; affordability: 54% Qataris vs. 54% other nationals).

% who say they changed their privacy settings on social media due to privacy concerns
(among those who say concerns about privacy changed the way they use social media)



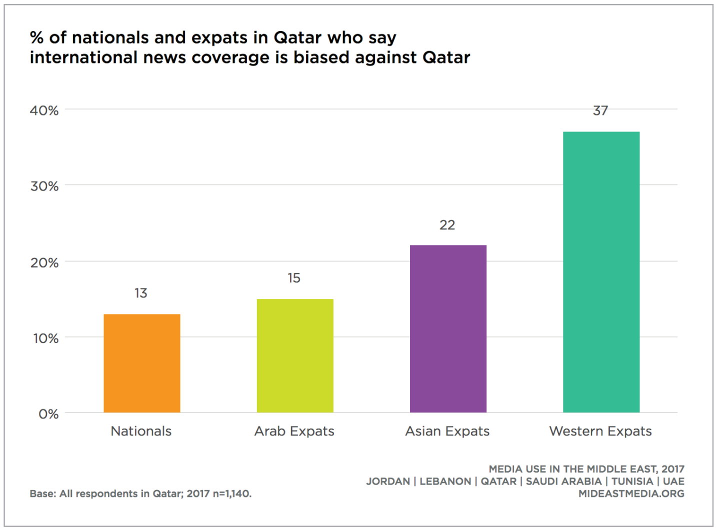
Base: Nationals who say concerns about privacy changed the way they use social media; 2017 n=909.

MEDIA USE IN THE MIDDLE EAST, 2017
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

On average, 20% of Arab nationals say that concerns about privacy changed the way they use social media, and Qataris are right at the average (21%). Of those who changed their social media behavior due to privacy concerns, Qataris are far likelier than other nationals to have changed their privacy settings.

Perhaps because of this, Qataris are only half as likely as other nationals to express concern about companies checking what they do online and three time less likely to worry about governments checking their online activity (companies checking: 20% Qataris vs. 40% other nationals; governments checking: 12% Qataris vs. 37% other nationals). Qataris are also less likely to be worried about online surveillance compared to expatriates living in Qatar (companies checking: 20% Nationals vs. 28% Arab expats, 37% Asian expats, 24% Western expats; governments checking: 12% Nationals vs. 22% Arab expats, 38% Asian expats, 31% Western expats).

Perceptions of bias



Qatar is the only country where a majority of nationals feel international news organizations' coverage of their country is fair (60% Qataris vs. 35% other nationals). Respondents were asked if they thought international news outlets' coverage is fair, biased against, or biased in favor of their own country, the Arab world outside their country, and the Western world. Most Qataris feel international news organizations' coverage of Qatar is fair, with few believing it is biased against the country (news about own country: 60% fair, 13% biased against).

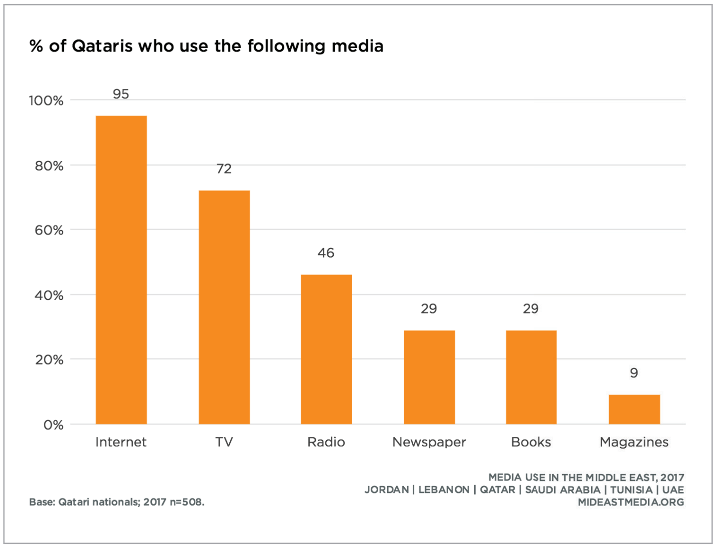
The pattern is similar regarding Qataris' perceptions of international news outlets' coverage of the rest of the Arab world. Qataris are the most likely to feel coverage is fair and the only country where more than half feel coverage is fair (54% Qataris vs. 33% other nationals).

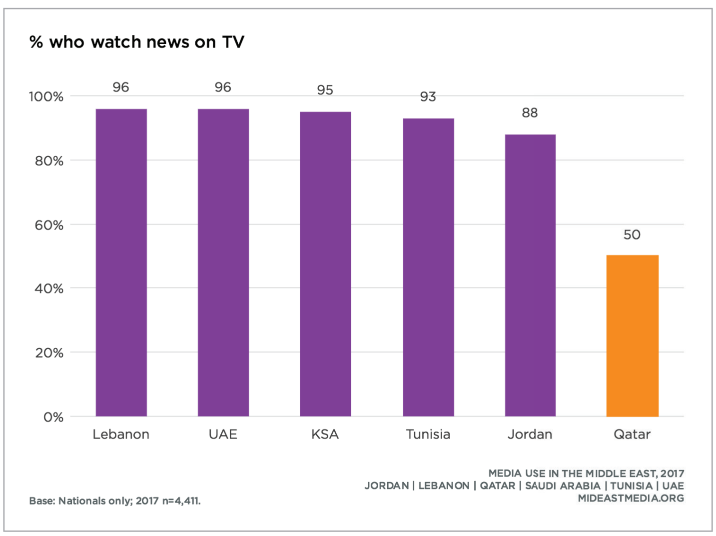
With regards to news about the Western world, Qataris are again the nationals most likely to say coverage is fair (51% Qataris vs. 31% other nationals). However, unlike their perceptions of coverage about Qatar and other Arab countries, Qataris are much more likely to say news is biased in favor of the Western world than against it (25% biased in favor vs. 3% biased against).

Western expatriates living in Qatar are much more likely than Qataris and Arab expatriates living in Qatar to say that news coverage is biased against Qatar (37% Western expats vs. 13% Nationals, 15% Arab expats, 22% Asian expats). Qatari nationals hold a very different opinion than Western expatriates about coverage of the West; few Qataris feel coverage is biased against the Western world, compared with nearly four in 10 Western expatriates who believe there is a negative bias against the Western world (3% Nationals vs. 38% Western expats).

In general, Qataris and Arab expatriates hold similar views about international news bias. One notable difference, however, is that Arab expatriates are almost twice as likely as Qatari nationals to feel international news coverage is biased against the Arab world outside Qatar (34% Arab expats vs. 18% Nationals).

News consumption





Two-thirds of Qataris get news on their phone, a rate lower than nationals from all other countries except Tunisia (67% Qatar, 62% Tunisia vs. 77% Jordan, 76% Lebanon, 94% KSA, 98% UAE).

Qataris are also much less likely to get news from TV compared with other nationals. Only half of Qataris say they get news from TV compared to nearly all other nationals (50% Qataris vs. 93% other nationals).

When asked for the locale of their favorite news organization, about half of Qataris said their favorite outlet is based in Qatar, while most of the remainder either did not know or declined to say (53% based in Qatar vs. 33% don't know or declined). When asked about ownership, one-third of Qataris said their favorite news organization is state/government owned, a quarter said it is privately owned, and four in 10 did not know or did not say (33% state/government owned, 25% private/corporate ownership, 41% do not know/declined).

Similar to other nationals, two-thirds or more of Qataris watch news and comedy videos on TV and online. Qataris, though, are the most likely nationals to watch religious and spiritual videos through either platform (online: 63% Qatar vs. 58% Jordan, 56% KSA, 56% UAE, 37% Tunisia, 29% Lebanon; on TV: 68% Qatar vs. 62% Jordan, 65% KSA, 60% UAE, 47% Tunisia, 40% Lebanon).

GLOBAL COMPARISONS

Americans are more likely than nationals in most countries surveyed to say that international news coverage is biased against the Arab world.

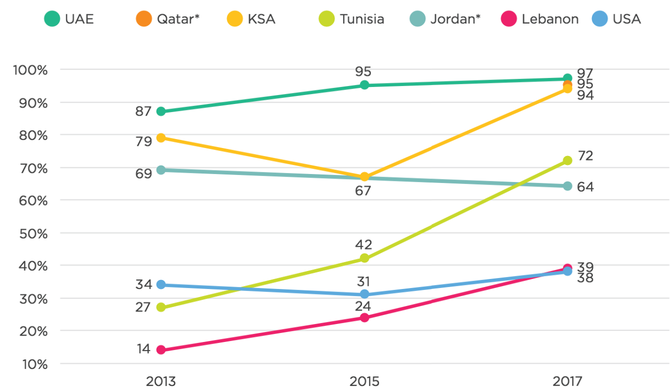
In this chapter

- National optimism
- Free speech
- Online privacy
- Credibility of news media
- Internet activities

To facilitate global comparisons with the United States, this survey includes many of the core questions from the World Internet Project, as well as surveys conducted by Pew Research Center, Gallup, and other syndicated sources. Collaboration with Harris Poll to include some of the *Media Use in the Middle East* questions in an April 2017 survey in the United States expands the scope of questions even further to draw comparisons between the Arab world and their American counterparts. When U.S. data were only available for 2015, comparisons to the Arab world are made by using the 2015 *Media Use in the Middle East* survey. All Middle East data reported in this chapter are among nationals only.

National optimism

% who say their country is headed in the right direction



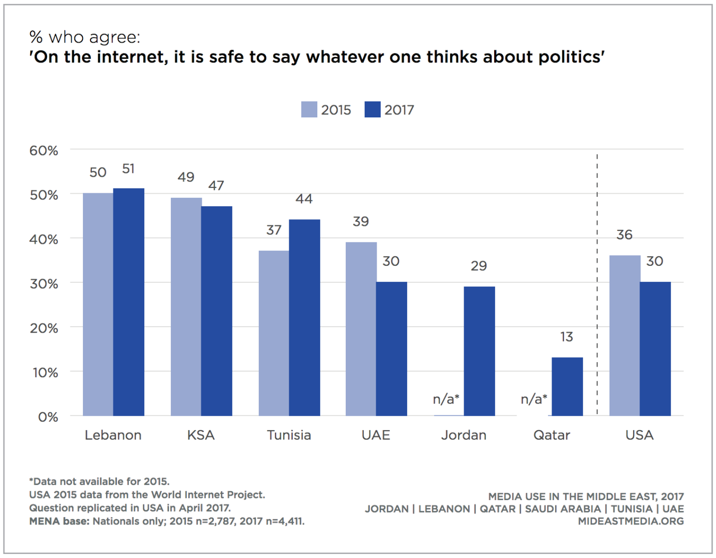
*Data not available for Qatar 2013 and 2015, Jordan 2015.
USA data based on Real Clear Politics,
March 2013, 2015, and 2017.
MENA base: Nationals only;
2013 n=4,587, 2015 n=2,787, 2017 n=4,411.

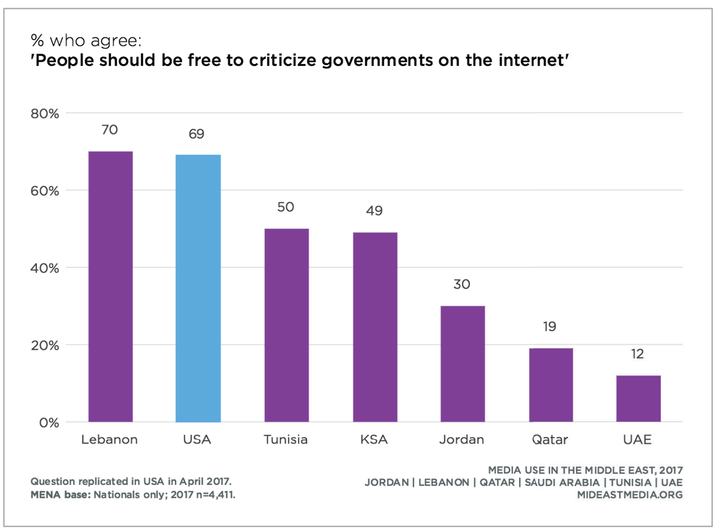
MEDIA USE IN THE MIDDLE EAST, 2017
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

The “right direction/wrong track” question is a long-standing, general measure of public perception of the well-being of one’s country. Nearly all nationals in the Gulf states say their country is headed in the right direction (97% UAE, 95% Qatar, 94% KSA). Tunisians and Jordanians are optimistic as well (right direction: 72% Tunisia, 64% Jordan). Fewer than four in 10 Americans and Lebanese, however, feel their country is headed in the right direction (38% U.S., 39% Lebanon; U.S. data: Real Clear Politics, 2017).

Optimism increased steadily among nationals in Lebanon and Tunisia (right direction: Lebanon: 14% in 2013 vs. 24% in 2015 vs. 39% in 2017; Tunisia: 27% in 2013 vs. 42% in 2015 vs. 72% in 2017). “Right direction” sentiment in Saudi Arabia sharply increased since 2015 (67% 2015 vs. 95% in 2017). Optimism that the UAE is headed in the right direction continues to be very strong among a large majority of Emiratis (87% in 2013 vs. 95% in 2015 vs. 97% in 2017). Jordanians remain steady at about two-thirds expressing such optimism (69% in 2013 vs. 64% in 2017). In comparison, optimism in the U.S. remains below 40% (right direction: 34% in 2013 vs. 31% in 2015 vs. 38% in 2017; U.S. data: Real Clear Politics, 2013, 2015, 2017).

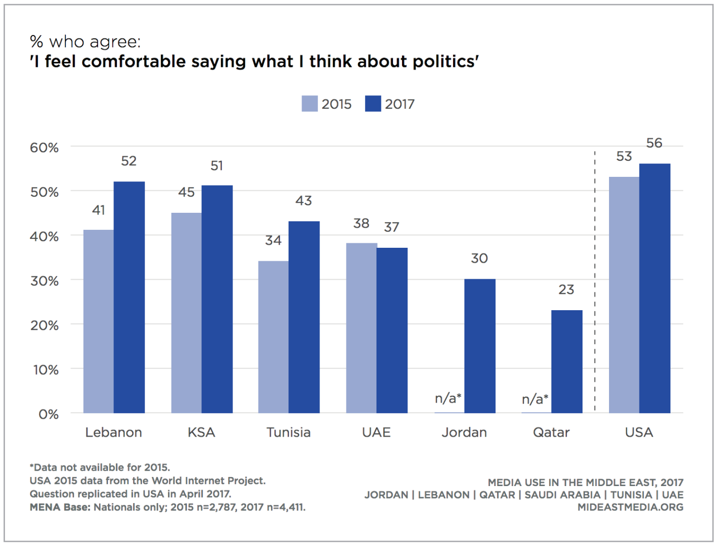
Free speech

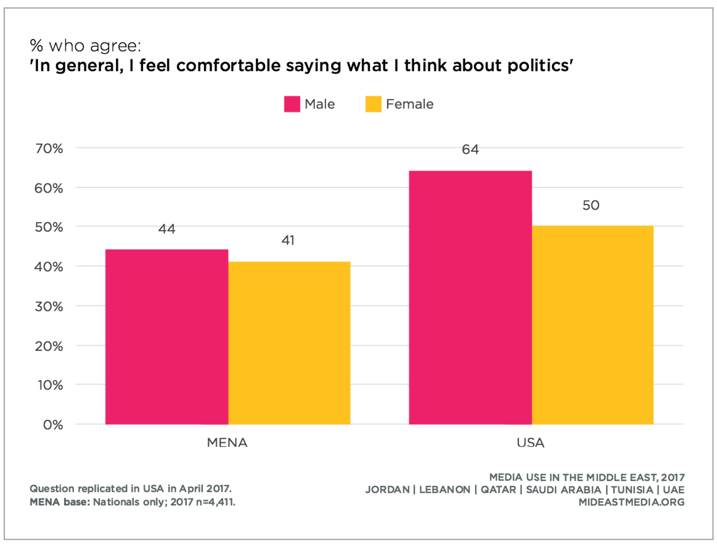




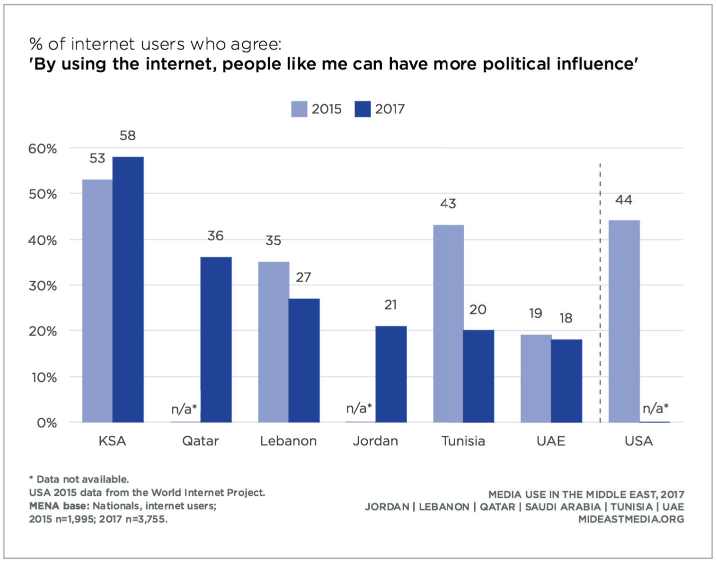
Respondents were asked whether they agree or disagree that “on the internet, is it safe to say whatever one thinks about politics.” Across the region, only four in 10 Arab nationals feel it is safe to talk about politics online, with no more than half in any country agreeing. Nationals in Lebanon, Saudi Arabia, and Tunisia are the most likely to feel it is safe to speak out about politics online and Qataris the least likely (51% Lebanon, 47% KSA, 44% Tunisia vs. 13% Qatar). Americans are somewhat circumspect and similar to Jordanians and Emiratis in their responses, with three in 10 agreeing it is safe to talk about politics online (30% U.S., 30% UAE, 29% Jordan; U.S. data: Harris Poll, 2017).

Seven in 10 Americans and Lebanese believe people should be free to criticize government on the internet (69% U.S., 70% Lebanon; US data: Harris Poll, 2017). In comparison, fewer than one in five Qataris and Emiratis agree (19% Qatar, 12% UAE). Tunisians, Saudis, and Jordanians fall in the middle (50% Tunisia, 49% KSA, 30% Jordan). More than half of Americans, Lebanese, and Saudis feel comfortable voicing their political opinions (56% U.S., 52% Lebanon, 51% KSA; U.S. data: Harris Poll, 2017). Four in 10 Tunisians and Emiratis feel comfortable speaking about politics, while fewer Jordanians and Qataris agree (43% Tunisia, 37% UAE vs. 30% Jordan, 23% Qatar).





Many internet users in the region feel they can increase their political influence by using the internet. Saudis more than other Arab nationals are likely to perceive greater political influence online, while Emiratis are the least likely to say the same (2015: 53% KSA, 19% UAE). Just under one-half of U.S. internet users think they can have more political influence online, similar to the share of Tunisians and more than nationals in Lebanon (2015: 44% U.S., 43% Tunisia, 35% Lebanon; U.S. data: World Internet Project, 2015).

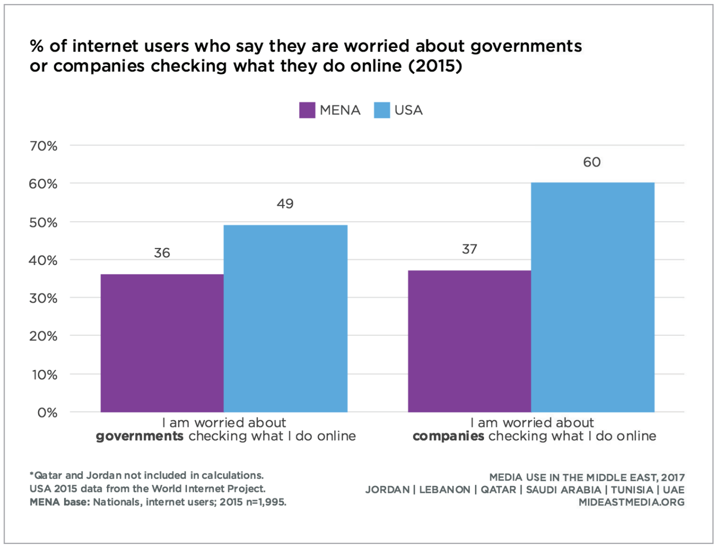


Views about the topics people should be able to discuss publicly vary widely by country. Two-thirds of Lebanese and one-half of Tunisians think people should be able to publicly criticize the government's policies, while those in the Gulf states are much less likely to agree (2017: 66% Lebanon, 48% Tunisia vs. 27% KSA, 21% Qatar, 14% UAE). In comparison, nearly all Americans believe in the freedom of people to publicly criticize the government's policies (2015: 95%; U.S. data: Pew Research Center, 2015).[1]

Very few Arab nationals, though, believe people should be able to make public statements offensive to their religion or beliefs or offensive to minority groups (2017: 15% religion/beliefs, 17% minority groups). Saudis and Tunisians are twice as likely as nationals from other Arab countries to support this form of free speech, but the rate remains low at only one in five in these countries (2017: religion/beliefs: 23% KSA, 20% Tunisia vs. 11% UAE, 9% Lebanon, 3% Qatar; minority groups: 25% KSA, 21% Tunisia vs. 12% UAE, 12% Lebanon, 6% Qatar). While Americans may not agree with statements that are offensive to their religion or beliefs or to minority groups, most still support people's right to make these statements publicly (2015: religion/beliefs: 77%; minority groups: 67%; U.S. data: Pew Research Center, 2015).[2]

1. This question was asked in 2015 in the USA and in 2017 in MENA.
2. This question was asked in 2015 in the USA and in 2017 in MENA.

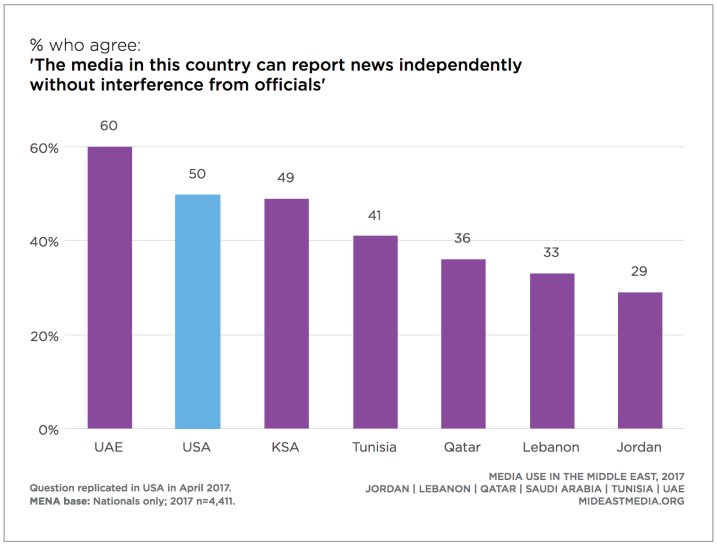
Online privacy

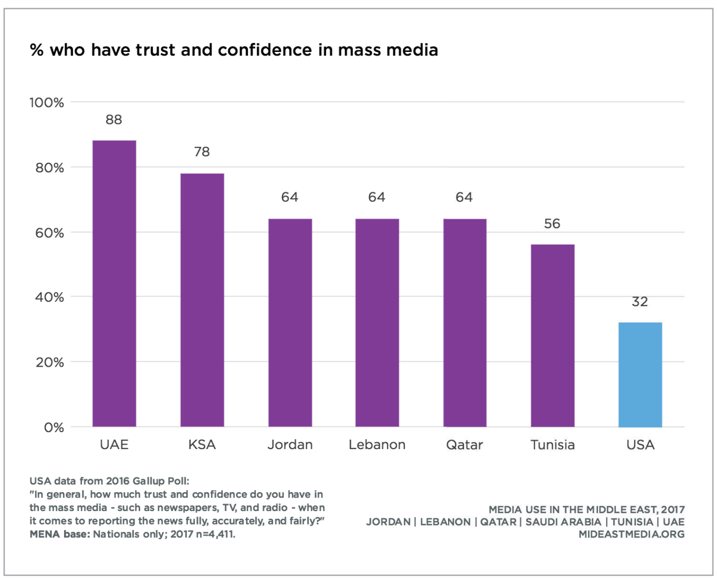


Concern about online surveillance is much more common among U.S. internet users than for those in the Arab countries in this study. One-half of U.S. internet users, compared with one-third of Arab internet, users worry about government checking what they do online (2015: 36% Middle East vs. 49% U.S; U.S. data: World Internet Project, 2015). Six in 10 U.S. internet users, compared with just one-third in Arab states, worry about companies monitoring their online activity (2015: 37% Middle East vs. 60% U.S.; U.S. data: World Internet Project, 2015).[3]

3. 2015 data for government and companies checking online activity do not include Jordan and Qatar.

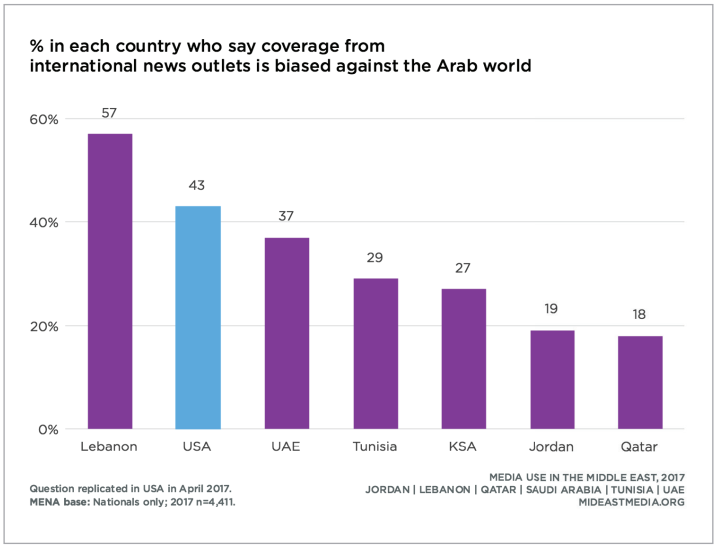
Credibility of news media





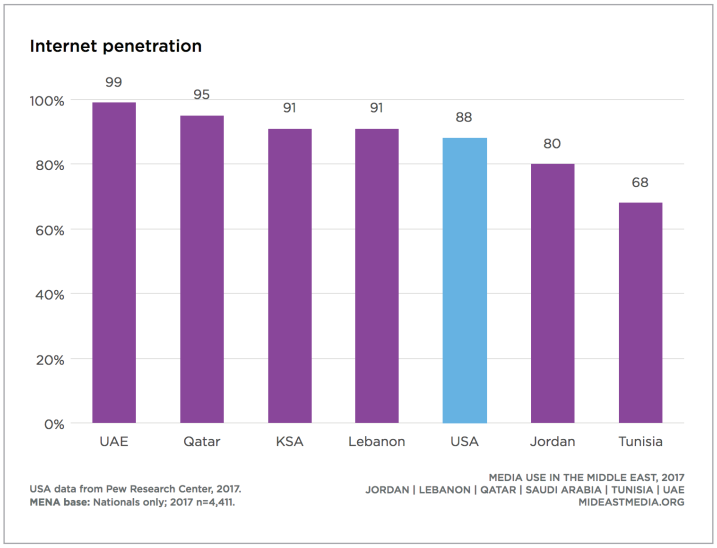
More Emiratis than other Arab nationals say media in their country can report news independently without interference from officials. Six in 10 Emiratis agree their media is independent, as do one-half of Saudis and Americans (60% UAE, 49% KSA, 50% U.S.; U.S. data: Harris Poll, 2017). In comparison, only one-third of nationals in Qatar, Lebanon, and Jordan feel media in their respective countries are free from official interference (36% Qatar, 33% Lebanon, 29% Jordan).

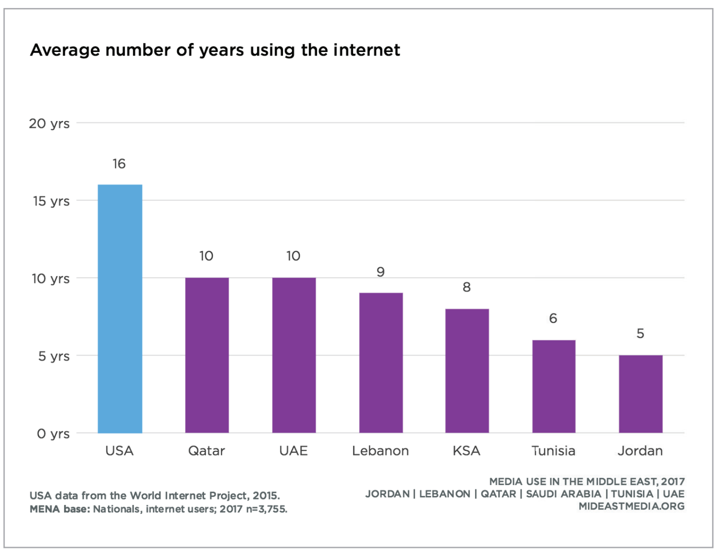
Distrust of mass media to report the news fully, accurately, and fairly is much more common among Americans than Arab nationals. In a 2016 Gallup poll, just 32% of Americans said they trust the mass media compared with two-thirds or more in Jordan, Lebanon, Qatar, Saudi Arabia, and the UAE, and 58% in Tunisia (U.S. data: Gallup, 2016).



Respondents were asked if they thought international news organizations' coverage was biased against the Arab world, biased in favor of the Arab world, or if coverage was fair. Four in 10 Americans think international news is biased against the Arab world with only Lebanese more likely to perceive such bias (57% Lebanon, 43% U.S.; U.S. data: Harris Poll, 2017). Less than one in five in Jordan and Qatar feel international coverage is biased against the Arab world (19% Jordan, 18% Qatar). One-quarter to one-third of nationals in each the UAE, Tunisia, and Saudi Arabia perceive bias against the Arab world in international news (37% UAE, 29% Tunisia, 27% KSA).

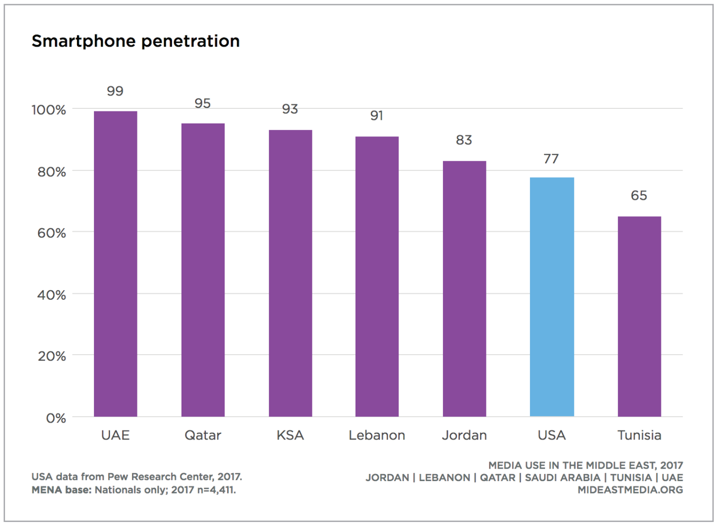
Internet activities





Nearly nine in 10 Americans use the internet, similar to the rates observed in Lebanon, Qatar, and Saudi Arabia (88% U.S., 95% Qatar, 91% Lebanon, 91% KSA; U.S. data: Pew Research Center, 2017a). In comparison, nearly 100% of Emiratis use the internet, while fewer are online in Jordan and Tunisia (99% UAE vs. 80% Jordan, 68% Tunisia).

Smartphone ownership is more prevalent in the Middle East than in the U.S. Nearly all nationals in Lebanon, Qatar, Saudi Arabia, and the UAE own a smartphone and nearly as many Jordanians (91% Lebanon, 93% KSA, 95% Qatar, 99% UAE, 83% Jordan). In comparison, only 77% of Americans own a smartphone (Pew Research Center, 2017a); only Tunisians own smartphones at a lower rate (65%).

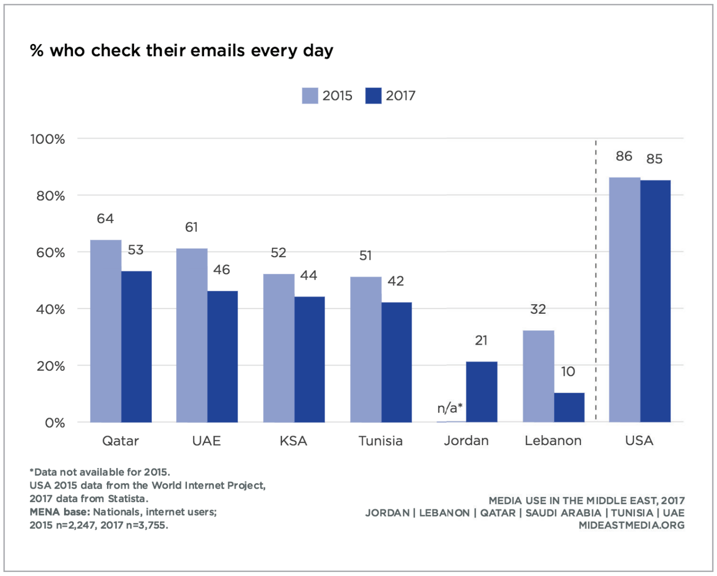


However, computers (laptops and desktops) are much more common in the U.S. than in the Arab region. Three in four Americans use a computer (78%; U.S. data: Pew Research Center, 2017a) compared to about one-half or less in the Arab countries surveyed (55% UAE, 52% KSA, 48% Qatar, 38% Tunisia, 27% Lebanon, 11% Jordan).

Tablets—owned by one-half of Americans—are also much more common in the U.S. than the Arab countries in this study (51% U.S. vs. 37% UAE, 36% KSA, 19% Tunisia, 18% Qatar, 15% Lebanon, 3% Jordan; U.S. data: Pew Research Center, 2017a). Use of e-readers is relatively low across the board. About one in five use an e-reader in the U.S. and Saudi Arabia, while penetration is much lower in the other countries (22% U.S., 17% KSA vs. 10% UAE, 9% Tunisia, 3% Lebanon, 2% Qatar, 1% Jordan; U.S. data: Pew Research Center, 2017a).

Facebook penetration among Americans is similar to that of nationals in Jordan, Lebanon, and the UAE; about seven in 10 use Facebook in these countries (68% U.S., 70% Jordan, 70% UAE, 77% Lebanon; U.S. data: Pew Research Center, 2017b). Just over one-half use Facebook in Saudi Arabia and Tunisia, while only one-quarter of Qataris use Facebook (55% KSA, 57% Tunisia, 22% Qatar).

Instagram is popular in Qatar and the UAE with two-thirds using this platform (66% Qatar, 57% UAE). Four in 10 are on Instagram in Saudi Arabia, while much fewer use Instagram in Lebanon, Tunisia, Jordan—and the U.S. (32% Lebanon, 23% Tunisia, 21% Jordan, 28% U.S.; U.S. data: Pew Research Center, 2017b).



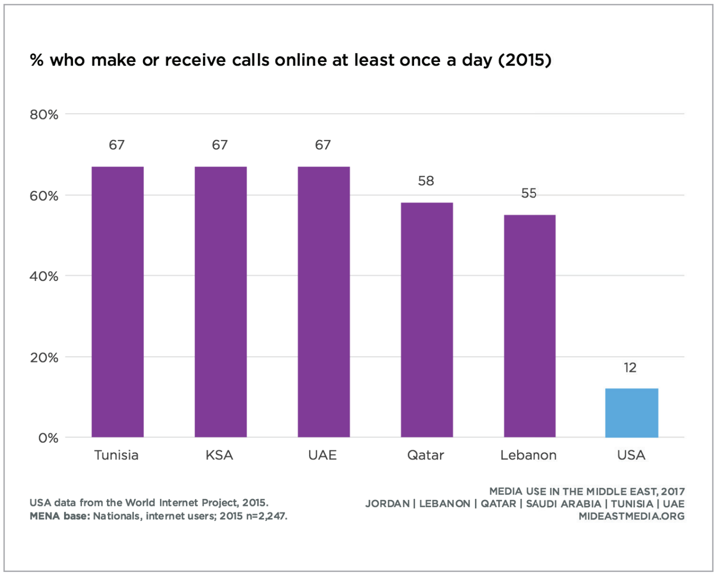
Just under one-half of nationals in the Gulf states use Twitter (47% KSA, 45% Qatar, 43% UAE), which is double the rate of Americans (21%; U.S. data: Pew Research Center, 2017b). Twitter is much less common among nationals in the other Arab countries (13% Lebanon, 9% Jordan, 8% Tunisia).

One-quarter of Americans are on LinkedIn (Pew Research Center, 2017b), but this site has yet to gain traction in the Middle East. LinkedIn has no more than 5% penetration in any of the Arab countries surveyed.

Internet users in the U.S. use email at much higher rates than those in the Middle East. Eighty-five percent of internet users in the U.S. check email every day compared to only three in 10 in the Middle East (85% U.S. vs. 30% Middle East; U.S. data: Statista, 2017). There has been a sharp decrease in daily email use among Arab internet users, from 52% in 2013 to 30% in 2017.

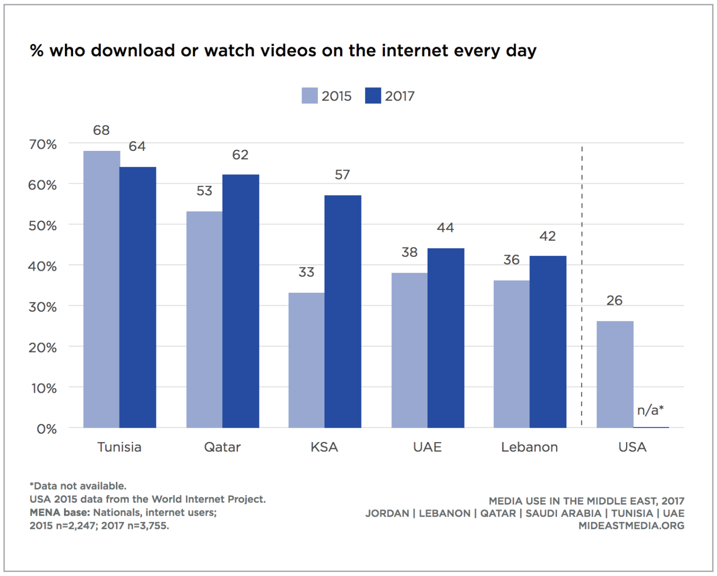
In comparison, Arab internet users are five times more likely than Americans to make or receive calls via the internet on a daily basis (2015: 62% Arab regional average vs.12% U.S.; U.S. data: World Internet Project, 2015). And VoIP use has grown in the Middle East over the past two years, with seven in 10 making or receiving calls online daily in 2017. Daily use of the internet for calls has skyrocketed in Lebanon from 55% in 2015 to 91% in 2017.[4]

4. This and subsequent data do not include Jordan.



American and Arab internet users are equally likely to get news online on a daily basis (2015: 53% Middle East vs. 48% U.S.; U.S. data: Word Internet Project, 2015). Yet those in Arab countries are four times as likely to search the internet for health and religious information every day (2015: health: 26% Middle East vs. 9% U.S; religious/spiritual: 27% Middle East vs. 6% U.S; U.S. data: World Internet Project, 2015). Qataris are by far the most likely to search for health and religious information every day (55% health, 57% religious/spiritual).

American and Arab internet users use the internet for music and games at similar rates. About one-third download or listen to music and play games online every day (2015: music: 36% Middle East vs. 31% U.S.; games: 35% Middle East vs. 32% U.S.; U.S. data: World Internet Project, 2015). In comparison, internet users in Arab countries are more likely to download or watch videos daily (2015: 43% Middle East vs. 26% U.S.; U.S. data: World Internet Project, 2015).



Internet users in Arab countries seem to be more avid users of social media than American internet users; they are nearly twice as likely as internet users in the U.S. to post messages or comment on social media every day or to re-post content from other people daily (2015: social media post/comment: 64% Middle East vs. 32% U.S; re-post others' content: 53% Middle East vs. 29% U.S; U.S. data: World Internet Project, 2015).

FOCUS ON EGYPT

Internet users have doubled in Egypt since 2013, and now 6 in 10 people have smartphones.

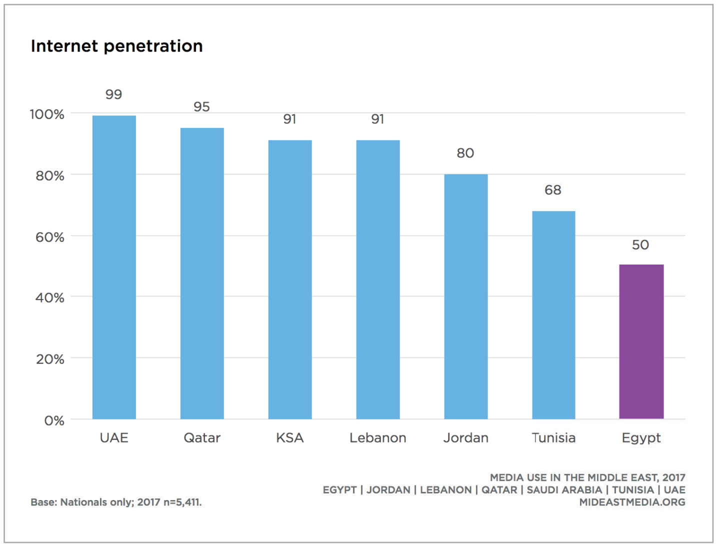
In this chapter

- Internet and social media
- Media use
- Free speech
- Online privacy and regulation
- News consumption
- Socializing with others

Permission from the Egyptian government to conduct this survey was granted too late to include Egypt in our overall analysis. This late timing and some exclusions and modifications to several survey questions means the previous chapters do not include data for Egypt.

However, since the research was completed before the printing of this report, we include this chapter covering the same content areas for Egypt.

Internet and social media

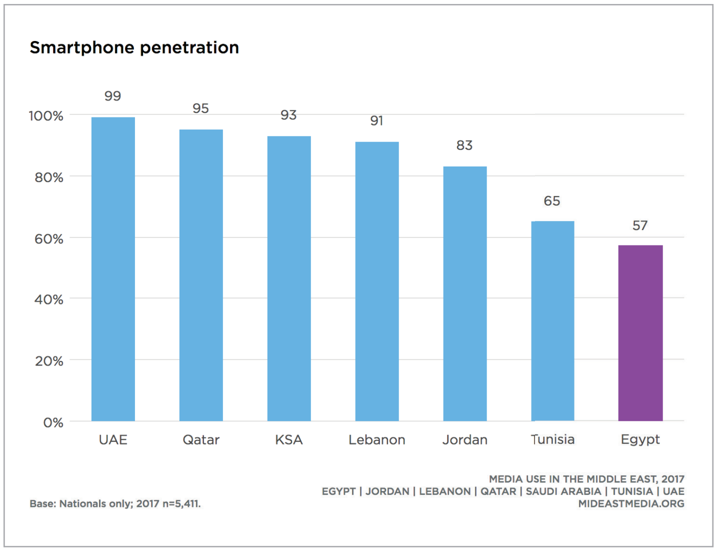


Internet penetration remains low in Egypt, with only modest gains since 2015 (22% in 2013 vs. 45% in 2015 vs. 50% in 2017). Internet penetration is also much lower in Egypt than in the other surveyed countries (50% Egypt vs. 68% Tunisia, 80% Jordan, 91% Lebanon, 91% KSA, 95% Qatar, 99% UAE). Additionally, Egyptians have been using the internet for a shorter average amount of time than other nationals (5 years Egyptians vs. 7.6 years other nationals).

Egyptians using the internet spend an average of 26 hours online per week, slightly lower than other nationals (29 hours). Average time spent online per week in Egypt, however, has increased (18 hours in 2013 vs. 23 hours in 2015 vs. 26 hours in 2017).

The primary reasons Egyptians cite for not using the internet are similar to those cited by other nationals—they do not know how to use it/are confused by technology (41% Egypt vs. 38% other nationals) or they are not interested/do not find it useful (33% vs. 37%). Few Egyptians say a lack of internet access has been a barrier (1% no internet connection; 7% no computer/device; 7% too expensive).

Consistent with internet penetration, smartphone ownership is also lowest in Egypt (57% Egypt vs. 65% Tunisia, 83% Jordan, 91% Lebanon, 93% KSA, 95% Qatar, 99% UAE). However, using smartphones to connect to the internet is rising and computer use declining (smartphones: 32% in 2015 vs. 47% in 2017; computers: 34% in 2015 vs. 20% vs. in 2017). Using tablets and e-readers remains uncommon (8% and 1%, respectively), a pattern similar to other Middle East countries.



Almost all Egyptian internet users connected to the internet via mobile phone in the past month (98%). While overall less common, rates of connecting to the internet via Wi-Fi and mobile data service are similar to each other (67% each).

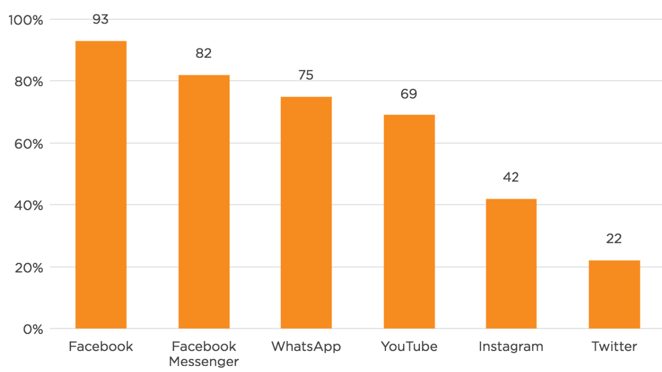
Egyptians use the internet primarily to interact with others (46% see what friends and family are doing, 46% get messages via direct message, 45% get messages on social media, 45% post messages/comments on social media, 43% re-post others' content, 42% post/share own multimedia content, 41% post messages/comments on direct message).

Like other nationals, making or receiving calls over the internet has increased over time in Egypt (8% in 2013 vs. 37% in 2015 vs. 43% in 2017). However, Egyptians report lower participation rates in all internet activities compared to other nationals due to an overall lower internet penetration rate. When looking at internet users only, the differences are far less pronounced, except the dramatically lower likelihood of Egyptians to look for health information online (68% Egyptians vs. 88% other nationals).

Four percent of Egyptians report participating in online job training or an online degree or certificate program in the past year, compared with six percent of other nationals.

Egyptians increasingly embrace social media, as evidenced by increased use of multiple social media platforms. While internet penetration increased by only five percentage points since 2015, use of Facebook increased by 8-points, WhatsApp by 12-points, YouTube by 13-points, and Instagram by 17-points (2017: 47% Facebook, 38% WhatsApp, 35% YouTube, 21% Instagram). Twitter is the only platform not experiencing broader use since 2015 (11% in 2017).

% of Egyptian internet users who use the following social media



Base: Egyptian nationals, internet users; 2017 n=471.

MEDIA USE IN THE MIDDLE EAST, 2017
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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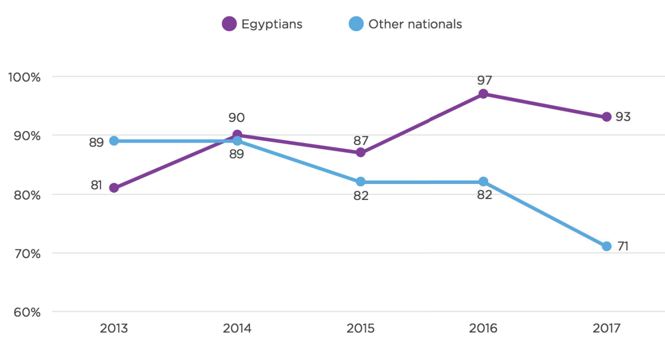
% of internet users who use Facebook



*Jordan not included in calculations.
Base: Nationals, internet users; 2013 n=2,856, 2014 n=2,426, 2015 n=2,764, 2016 n=3,355, 2017 n=3,539

MEDIA USE IN THE MIDDLE EAST, 2017
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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Rates of social media usage increased even more among internet users only. Compared with 2015, use of Facebook among internet users increased by 5 percentage points, Facebook messenger by 37-points, WhatsApp by 17-points, YouTube by 20-points, and Instagram by 32-points (2017: 93% Facebook, 82% Facebook messenger, 75% WhatsApp, 69% YouTube, 42% Instagram). Twitter is the only platform that did not increase in use—down 3-points since 2015 (22% in 2017).

Compared with other nationals, Egyptians are using Facebook at increasing rates while Facebook's popularity is declining among their Middle Eastern counterparts (Egyptian internet users: 81% in 2013 vs. 93% in 2017; other nationals using the internet: 90% vs. 74%). And stable Twitter usage across Egyptian internet users contrasts with a nearly fifty percent decrease usage rate among internet users in other counties (Egyptians: 23% in 2013 vs. 22% in 2017; other nationals: 47% vs. 24%).

Less than half of Egyptians use direct messaging (46%). Of those, the vast majority of chats are with individuals as opposed to groups (85% individual vs. 15% group). This represents not only the lowest group messaging rate across the region (50% other nationals), but also a decline since 2015 (32% in 2015). Along with Qatar, Egypt is the only country where messaging via group chat decreased over time.

Among those few using group chats, Egyptians are more likely than other nationals to group chat with friends and less likely to group chat with family (friends: 90% Egyptians vs. 76% other nationals; family: 64% vs. 75%).

Media use

Nearly all Egyptians watch TV, similar to nationals in other countries (96% Egyptians vs. 93% other nationals). However, they are less likely than other nationals in the region to use other types of offline media, including radio, newspapers, books, and magazines (radio: 33% Egyptians vs. 49% other nationals; newspapers: 16% vs. 25%; books: 16% vs. 29%; magazines: 11% vs. 19%).

As in other countries, newspaper readership in Egypt declined over time, from 25% in 2013 to 24% in 2015 to only 16% in 2017.

Egyptians consume TV almost exclusively in Arabic (96% Arabic, 6% English). By comparison, while increases in internet use in Arabic rose proportionally with overall internet use, the rate of using the internet in English remains unchanged (Arabic: 43% in 2015 vs. 49% in 2017; English: 11% in 2015 vs. 12% 2017).

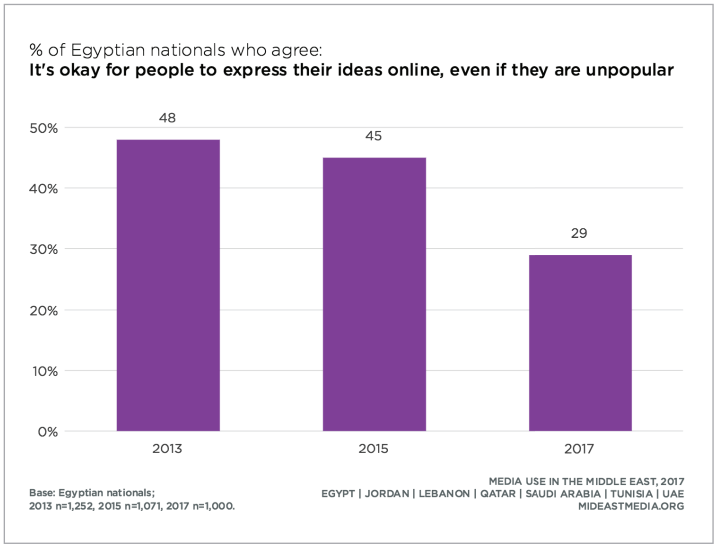
Comedy is the most popular TV genre in Egypt followed by news (77% and 61%, respectively). While comedy viewership on TV remains relatively stable over time, TV news viewership declined steadily over the same timeframe (comedy: 64% in 2013 vs. 81% in 2015 vs. 77% in 2017; news: 85% vs. 68% vs. 61%). Less than half of Egyptians watch spiritual content, sports, or social satire on TV (47%, 39%, and 30%, respectively).

Compared to other nationals, Egyptians watch more comedy on TV, but less news and satire (comedy: 77% Egyptians vs. 67% other nationals; news: 61% vs. 67%; social satire: 30% vs. 51%). Egyptians and other nationals watch spiritual content and sports in equal proportions (spiritual: 47% Egyptians vs. 50% other nationals; sports: 39% vs. 41%).

Online watching rose since 2015 across news, comedy, sports, and social satire (news: 30% in 2015 vs. 36% in 2017; comedy: 24% vs. 31%; sports: 14% vs. 24%; social satire: 13% vs.19%). Still, because of the lower overall internet penetration, Egyptians watch proportionally less content online compared to other nationals.

Considering specifically internet users, the proportion of Egyptians watching news online is relatively unchanged over time, while the rates of viewing comedy, sports, and social satire online rose (news: 76% in 2013 vs. 67% in 2015 vs. 72% in 2017; comedy: 30% vs. 52% vs. 62%; sports: 32% vs. 31% vs. 48%; social satire: 29% in 2015 vs. 38% in 2017). Even among internet users, Egyptians are more likely than other nationals to watch news online but less likely to watch comedy and social satire (news: 72% Egyptians vs. 66% other nationals; comedy: 62% vs. 71%, social satire: 38% vs. 56%).

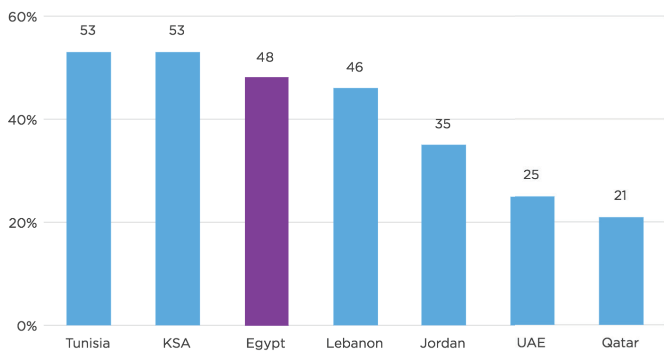
Free speech



In Egypt, the percent who feel it is okay for people to express their ideas on the internet even if they are unpopular declined sharply over the past two years (48% in 2013 vs. 45% in 2015 vs. 29% in 2017). Further, one in three Egyptians say it is safe to talk about news and current affairs on the internet (30%). One in three also say they feel comfortable saying what they think about news and current affairs in general (33%).

Online privacy and regulation

% of internet users who agree:
'I am worried about companies checking what I do online'



Base: Nationals, internet users; 2017 n=4,226.

MEDIA USE IN THE MIDDLE EAST, 2017
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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Half of Egyptians say the internet in their country should be more tightly regulated, unchanged from 2015 (42% in 2013 vs. 49% in 2015 vs. 49% in 2017). Only Qataris and Emiratis are less likely to support stronger internet regulation (39% Qatar, 41% UAE, 49% Egypt, 56% Tunisia, 57% Jordan, 57% KSA, 77% Lebanon).

Drilling down to specific types of internet regulation, nearly half of Egyptians feel the internet in their country should be more tightly regulated to protect user privacy, less than all other nationals except Emiratis (44% UAE, 47% Egypt, 53% Jordan, 53% Qatar, 54% KSA, 56% Tunisia, 75% Lebanon).

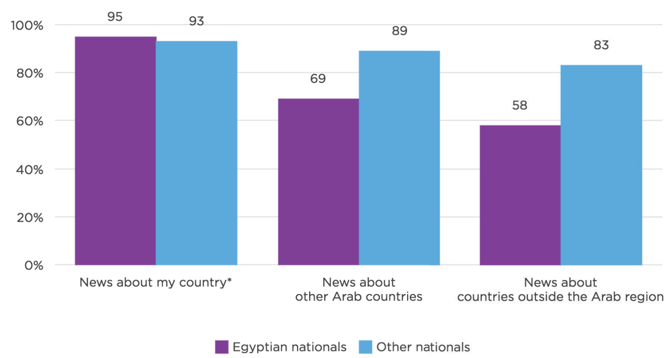
Perhaps the greater support for regulations protecting user privacy springs from the growing number of Egyptian internet users worrying about companies checking their online activity, doubling since 2015 (31% in 2013 vs. 24% in 2015 vs. 48% in 2017). Only Saudis and Tunisians show more concern about companies monitoring their internet activities (21% Qatar, 35% Jordan, 35% UAE 46% Lebanon, 48% Egypt, 53% KSA, 53% Tunisia).

Four in 10 Egyptians think the internet should be more regulated to keep it affordable and to regulate content related to news and current affairs.

On average, one in five Egyptians say privacy concerns have changed the way they use social media, similar to other nationals (19% Egyptians vs. 20% other nationals). Among those changing habits due to privacy concerns, Egyptians are more likely than any other nationals except Qataris to have changed their privacy settings but less likely to have changed or stopped using some social media services (changed privacy settings: 48% Egyptians vs. 33% other nationals, stopped using social media services: 12% vs. 20%; changed social media services: 6% vs. 15%).

News consumption

% who get news about...



*Asked 'the general local news' in Egypt.
Base: Nationals only; 2017 n=5,411.

MEDIA USE IN THE MIDDLE EAST, 2017
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

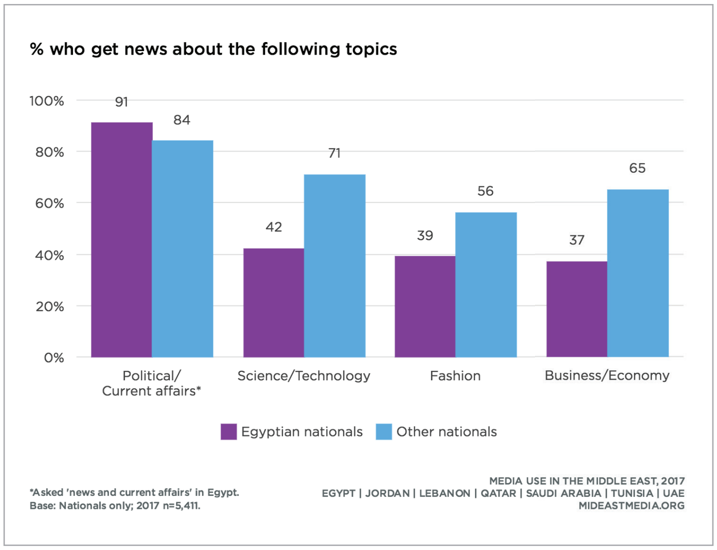
Three-quarters of Egyptians get news and news headlines from TV on a daily basis, similar to nationals from other countries (77% Egyptians vs. 78% other nationals). Driven by overall lower smartphone ownership, fewer Egyptians get news on a smartphone daily (42% Egyptians vs. 67% other nationals).

However, among the nearly sixty percent (57%) who own a smartphone, 83% get news and news headlines on their smartphone at all and 71% do so daily. Additionally, 73% of Egyptian smartphone owners watch news videos on their smartphone at all, and 46% do so daily.

Egyptians say television is by far the most important source for news and information but not as important as they indicated in 2013 (84% in 2013 vs. 75% in 2015 vs. 74% in 2017). Interpersonal sources have also declined in importance in Egypt as a source for news and information (64% in 2013 vs. 73% in 2015 vs. 54% in 2017).

Egyptians say online sources are generally as important for news and information as they were in 2015 (social media and direct messaging are slightly more important in 2017) but are far less important in Egypt than other countries due to lower internet penetration (importance for news: internet in general: 47% Egyptians vs. 80% other nationals; social media: 42% vs. 70%; direct messaging: 34% vs. 69%; news apps: 26% vs. 50%).

In terms of specific news sources, most Egyptians report watching Al Nahar (76%), Al Hayat (74%), CBC (66%), and Al Mehwar (51%) in the past week. Many fewer have watched Al Arabiya (25%), BBC (17%), or CNN (11%). While viewership rates of Al Arabiya are lower, rates of watching BBC and CNN are similar in Egypt compared to other countries. Egyptian authorities did not permit asking about Al Jazeera.

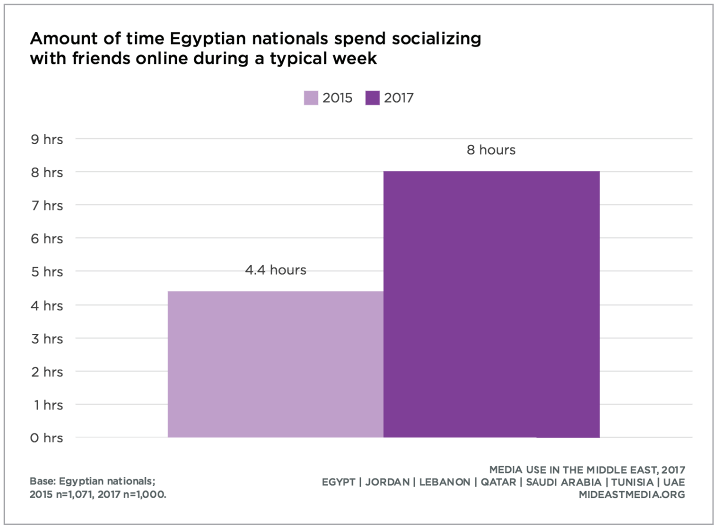


Egyptians express much more interest in local and national news than news from outside the country. Additionally, compared to nationals from other countries far fewer Egyptians follow news from outside their borders. While almost all nationals from all countries follow news about their own country and local community, Egyptians are less likely than other nationals to follow news about other Arab countries or countries outside the Arab region—by 20 to 25 percentage points (follow news about other Arab countries: 69% Egyptians vs. 89% other nationals; countries outside the Arab region: 58% vs. 83%).

Additionally, only one in five Egyptians believes people benefit from consuming news from foreign news organizations, similar to 2015, but far lower than any other nation (19% Egypt, 28% UAE, 28% Jordan, 33% Qatar, 48% Tunisia, 50% KSA, 54% Lebanon).

Egyptians are most likely to follow news about current affairs, arts and entertainment, and spirituality (91%, 78%, and 76%, respectively). Yet Egyptians are far less likely than other nationals to follow news about education (50% Egyptians vs. 66% other nationals), science and technology (42% vs. 71%), fashion (39% vs. 56%), or business and technology (37% vs. 65%).

Socializing with others



Egyptians increasingly spend more face-to-face time with family, rising from 9 to 20 to 31 hours per week across 2013, 2015, and 2017. During the same time period, face-to-face time with friends remains unchanged at about 11 hours on average per week. Egyptians' average weekly online face time with family and friends is similar to other nationals (other nationals: 33 hours with family, 13 hours with friends).

Despite relatively stable internet use over the past two years (45% in 2015 vs. 50% in 2017), Egyptians' over those same two years now spend double the number of hours per week online with friends (4.4 hours in 2015 vs. 8 hours in 2017); this is comparable to their Middle Eastern counterparts who are otherwise more likely to be online (8 hours with friends online Egyptians vs. 10 hours other nationals).

The time Egyptians spend online with family is relatively unchanged from 2015 and lower than other nationals (Egyptians: 3 hours in 2015 vs. 4 hours in 2017; other nationals: 8 hours in 2017).

Appendix A: METHOD

Suggested citations of this Study:

APA: Dennis, E. E., Martin, J. D., & Wood, R. (2017). *Media use in the Middle East, 2017: A seven-nation survey*. Northwestern University in Qatar. Retrieved from www.mideastmedia.org/survey/2017.

MLA: Dennis, Everette E., Justin D. Martin, and Robb Wood (2017). *Media Use in the Middle East, 2017: A Seven-Nation Survey*. Northwestern University in Qatar, 2017. Web. <www.mideastmedia.org/survey/2017>.

Chicago: Dennis, Everette E., Justin D. Martin, and Robb Wood. "Media Use in the Middle East, 2017: A Seven-Nation Survey." *Northwestern University in Qatar*. 2017. http://mideastmedia.org/survey/2017.

The results for the *Media Use in the Middle East, 2017 by Northwestern University in Qatar* are based on over six thousand (N=6,169) face-to-face and telephone interviews across six countries, conducted under the 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 Middle Eastern countries: Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia, and the UAE. These six countries represent a broad spectrum of populations across the Arab region. All fieldwork for this fifth wave of the *Media Use in the Middle East* survey took place between February 1 and March 29, 2017. Replicating many of the questions from the 2015 and 2013 surveys provides many longitudinal comparisons. These results draw fewer comparisons with the 2014 and 2016 surveys which focused on entertainment media and therefore share fewer questions with this 2017 survey. The 2017 and prior iterations of the survey are available at www.mediaeastmedia.org.

Data in all countries were collected via face-to-face interviews, except in Qatar, where interviewers conducted telephone interviews based on random-digit dialing. An overall master sample design governed sampling in all six nations. The multi-stage random probability sampling in Jordan, Lebanon, Saudi Arabia, Tunisia, and the UAE produces samples representative of the population in legal households in the surveyed areas. Each country's governorates or provinces were first divided into cities, towns, and villages, second divided into administrative units or sectors, and third into clusters each comprising several blocks. A block was defined as the PSU (Primary Sampling Unit). Interviewers followed a pre-defined random path through the block after first randomly selecting a starting point.

The telephone interviews in Qatar required reshuffling of telephone records prior to extracting a final sample, ensuring all numbers maintained a random sequence within each stratum. A special program then extracted phone numbers at regular intervals within a structured list. This multi-stage random probability selection of telephone numbers from the tele-database thereby yielded a representative sample.

Ensuring national representation of the adult population in each country required slight variations in sampling procedures by country. The samples in all countries, except Lebanon, include citizens and expatriates. Given the very small number of expatriates, the sample in Lebanon includes just citizens. 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 a heavy Hezbollah presence were also excluded.

Interviews lasted, on average, 30 minutes. The total number of questions asked varied based on responses to previous questions. For example, some questions applied only to internet users or users of specific social media platforms.

A summary of completed interviews and response rates for 2013, 2015, and 2017 is as follows:

COUNTRY[1]	COMPLETED INTERVIEWS (N)			RESPONSE RATE (%)			COMPLETED INTERVIEWS BY NATIONALITY (N)			
	2013	2015	2017	2013	2015	2017		2013	2015	2017
Jordan	1,250	-	1,009	75%	-	58%	Nationals	1,044	-	881
							Non-nationals	206	-	128
Lebanon	1,256	1,000	1,018	70%	54%	49%	Nationals	1,232	995	1,018
							Non-nationals	24	5	0
Qatar	1,253	1,000	1,140	54%	53%	37%	Nationals	352	280	508
							Non-nationals	901	720	632
Saudi Arabia	1,252	1,005	1,016	81%	77%	76%	Nationals	848	633	627
							Non-nationals	404	372	389
Tunisia	1,250	1,012	1,000	21%	85%	87%	Nationals	1,150	909	896
							Non-nationals	100	103	104
United Arab Emirates	1,264	1,005	1,013	70%	86%	73%	Nationals	313	250	481
							Non-nationals	951	755	532
Total	**7,525**	**5,022**	**6,169**							

1. The countries surveyed in 2013, 2015, and 2017 have varied. In 2013, Egypt and Bahrain were surveyed in addition to those listed in the table. In 2015, Egypt was included and Jordan was excluded from the research. The main report periodically makes longitudinal comparisons. In these cases, the samples compared include the six countries common across all surveys: Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia, and the UAE. Exceptions are noted.

Rim weighting each country's sample brought the data in line with the population in each country. The mathematical algorithm used in rim weighting helps 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, age, and nationality.

While the data *within* countries were weighted to be representative, the large variance in population across countries prevents weighting the overall sample of 6,169 respondents. The data file therefore includes an unweighted "average" of all survey respondents.

Details about the sample and method in each of the participating countries are provided below. The descriptions show each country's margin of sampling error based on all interviews conducted in that 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:** 6,169
- **Gender split:** 52% male, 48% female
- **Mean age:** 35 years old
- **Margin of Sampling Error:** +/- 1.3 percentage points

Jordan

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic
- **Fieldwork dates:** March 14 to March 26, 2017
- **Sample size:** 1,009
- **Gender split:** 50% male, 50% female
- **Mean age:** 35 years old
- **Margin of Sampling Error:** +/- 3.1 percentage points
- **Representative:** Adult population, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Lebanon

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic
- **Fieldwork dates:** February 22 to March 25, 2017
- **Sample size:** 1,018
- **Gender split:** 50% male, 50% female
- **Mean age:** 37 years old
- **Margin of Sampling Error:** +/- 3.1 percentage points
- **Representative:** Adult population, 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 households using a constant-fraction sampling
- **Mode:** Telephone, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 7 to March 23, 2017
- **Sample size:** 1,140
- **Gender split:** 56% male, 44% female
- **Mean age:** 34 years old
- **Margin of Sampling Error:** +/- 3.3 percentage points
- **Representative:** Adult population, less those in army barracks, hospitals, dormitories, and prisons

Saudi Arabia

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 6 to March 23, 2017
- **Sample size:** 1,016
- **Gender split:** 53% male, 47% female
- **Mean age:** 33.5 years old
- **Margin of Sampling Error:** +/- 3.2 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Tunisia

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, French, English
- **Fieldwork dates:** March 8 to March 27, 2017
- **Sample size:** 1,000
- **Gender split:** 51% male, 49% 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.

United Arab Emirates

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, English
- **Fieldwork dates:** February 1 to March 29, 2017
- **Sample size:** 1,013
- **Gender split:** 53% male, 47% female
- **Mean age:** 33.5 years old
- **Margin of Sampling Error:** +/- 3.6 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 sampling error account for data weighting.*

A more detailed summary of the method, sample and weighting can be found at www.mideastmedia.org/survey/2017.

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.

Survey in the United States

Periodically, this report references results of a survey conducted in the United States in April 2017. This survey was conducted online by Harris Poll from April 6-10, 2017 among 2,250 U.S. adults (18+ year-olds). Figures for age, sex, race/ethnicity, education, region, and household income were weighted as necessary to align with their actual population proportions. Propensity score weighting also adjusts for respondents' propensity to be online. However, because the sample is based on those who agreed to participate in our panel, no estimates of theoretical sampling error or margin of error can be calculated.

Survey in Egypt

Diplomatic hurdles delayed data collection in Egypt until well after the primary data collection described above. From June 18 to July 27, 2017, interviewers conducted 1,000 face-to-face interviews among the general population in Egypt under the direction of Harris Poll by Pan-Arab Research Center. Consistent with the methods described above, the same multi-stage sampling techniques were employed.

The average interview lasted 30 minutes, and the total number of questions asked varied based on responses to previous questions. Additionally, Egyptian authorities required deleting several survey questions and modifying a few others.

A summary of completed interviews and response rates for 2013, 2015, and 2017 is as follows:

COUNTRY	COMPLETED INTERVIEWS (N)			RESPONSE RATE (%)			COMPLETED INTERVIEWS BY NATIONALITY (N)			
	2013	2015	2017	2013	2015	2017		2013	2015	2017
Egypt	1,252	1,071	1,000	92%	97%	79%	Nationals	1,252	1,071	1,000
							Non-nationals	0	0	0

Rim weighting brought the data in line with the population in each country. The mathematical algorithm used in rim weighting helps 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.

A summary of Egypt data collection is included below.

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic
- **Fieldwork dates:** June 18 to July 27, 2017
- **Sample size:** 1,000
- **Gender split:** 50% male, 50% female
- **Mean age:** 35 years old
- **Margin of Sampling Error:** +/- 3.0 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Appendix B:
REFERENCES AND RELATED RESEARCH

The following references are either cited in this report or helped to inform it.

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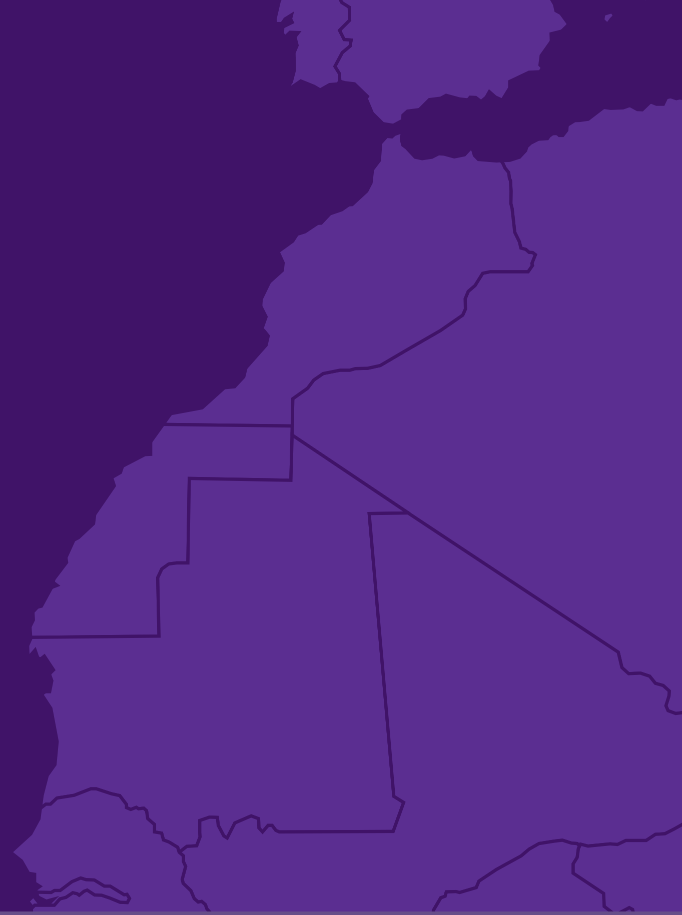

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