MEDIA USE IN THE MIDDLE EAST 2018

A Seven-Nation Survey

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MEDIA USE IN THE MIDDLE EAST 2018

A Seven-Nation Survey

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In association with The Harris Poll

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FOREWORD

Since 2013 Northwestern University in Qatar has conducted an annual survey, Media Use in the Middle East, asking the same questions year on year while adding new ones to capture and authenticate the dynamic state of public communication in the region. In 2018, we carried out our sixth such survey across seven countries, selected to approximate a reasonable representation of public opinion on media use and related topics in a turbulent and complex region. The studies were inspired by the Arab Spring, then in full flower but later to disappoint, as an effort to listen to the people of the region as they communicate among each other—and the world. As always, we make our findings public and also contribute them to the World Internet Project where they are the only source of such data from Arab countries.

We chose to assess and report on communication in the region writ large as legacy and emerging media have interacted and changed the face of the information ecosystem and landscape. Thus, serious attention to media use itself, as media were transforming themselves, and people's attitudes toward them have been essential to our storyline.

That has meant a grounding in cultural attitudes, linked to censorship and digital privacy, as our foundational underpinning. We begin with an assessment of media use by platform, and then an up-close look at film, television, music, podcasts, video games, sports, and news. In odd years (2013, 2015, and 2017) we have paid greater attention to news and information media, while in even years (2014, 2016, and 2018) we add emphasis on entertainment media and its functions. And always we take a focused look at Qatar. In 2018, we published a five-year retrospection of the work we had done to date from 2013 through 2017, a useful exercise as we prepared to launch this sixth study which is reported here.

Countries included in the study this year are Egypt, Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates, stretching across the region from North Africa to the Arab Gulf and embracing distinct cultural and national differences.

As always, this journey of discovery points to both the similarities and differences in a region often stereotyped in Western media.

In 2018, the sixth year of this continuing, longitudinal study, NU-Q celebrated its 10th anniversary as an educational institution in the State of Qatar. The year was a time to reflect on accomplishments as we engage in a critical appraisal of them. By any measure, our comprehensive and expansive studies of media use in the Middle East are among our proudest achievements. The public and scholarly attention they have generated has advanced the school's reputation for rigorous and relevant research. The studies have helped inspire, frame, and stimulate NU-Q's overall research program involving faculty, staff, and students. When the survey project was just beginning, the media use studies "bought time" for faculty research deliverables that can take years to come to fruition. This research enterprise demonstrates how such work can be done with dispatch from start to finish, producing a substantial monograph and an interactive website within a few months, despite the complexity of collecting data across seven countries.

The work in Doha has also contributed to our parent university's push toward global standing and research eminence. The studies are the beneficiary of the efforts of our research team, supportive faculty colleagues, and leadership both at the Qatar Foundation and on our home campus in Evanston, Illinois. Of course, nothing would have been achieved without support from the Qatar National Research Fund's National Priority Research Project grants and a contribution from Doha Film Institute, along with encouragement and endorsement of the Al Jazeera Media Network. Our collaborative work with The Harris Poll, which conducts the fieldwork and provides numerous other services, is also essential.

Logistics, aside, however, the great challenge in doing this kind of research about how people use media, the relationships between media use, and at times sensitive public attitudes in a region not known for a tradition of freedom of expression, is challenging, though we've been gratified that in country after country the research has been carried out without incident or onerous censorship. One of the realities of international and cross-cultural survey research is that it must meet procedural requirements of sometimes wary officials in the seven countries who, in doing their jobs, can raise issues about our questions on matters of censorship, politics, government, and religion, for example.

This, however, is not unique to the Middle East, as researchers who do cross-cultural research even in democratic states in Europe, Asia, and elsewhere have attested. Even in the U.S., some public opinion researchers report that critiques by government agencies or commercial enterprises also require modification or redaction of specific questions. We have faced that challenge, too. In a few instances, we've been asked to omit a locally sensitive question or to modify wording. While that has been rare, even in our questionnaire with hundreds of variables, when it does happen we always transparently call attention to reworded or redacted items. We are pleased that academic freedom and freedom to do research unimpeded has been our experience across the region, even in nations where freedom of expression is sometimes limited.

In presenting our findings from 2018, we first issued a news release in November 2018 with a summary of baseline findings to herald the coming of our interactive and searchable website, www.mideastmedia.org. This is now being followed by this report, which is being augmented by explanatory and interpretive essays written by leading scholars and experts.

What makes our work distinctive is its range and scope: 7,635 interviews conducted face to face (via phone in Qatar) across seven countries. That this is a longitudinal study and the only one in the region (and one of very few in the world) adds to its distinction. The report is both a public document aimed at a wide range of readers across many fields and enterprises and at the same time is scholarly work committed to the highest standards of survey research—with the goal of always being accessible to the general public.

Over the life cycle of these media use studies, we've seen the work used by students in classrooms both at Northwestern and around the world, teachers, media executives, journalists, and professionals, as well as those in commercial enterprises, diplomacy, and other institutions. The work has been showcased at press conferences and at international academic, business, governmental, and NGO meetings. The reports are frequently cited by media as a reliable source produced purely for public benefit without charge. Other researchers have also drawn on this work, using the data sets directly or to produce interpretive and analytical work that, we hope, contributes to public understanding of the changing media scene in Arab countries and how individuals interact with them and also sheds light on the life in the Middle East region and its peoples.

An especially notable consideration, we believe, goes to our original motivation for launching these studies—the political and social upheavals in the region at the time of the Arab Spring especially in late 2010 and 2011. With high expectations that those uprisings would lead to immediate and permanent change, many commentators, especially in the West, presumed the arrival of a new Middle East that did not materialize. With ongoing wars and other disarray in the region, other assumptions about the collapse of the robust communication in the legacy media were commonly made. These media use studies both overtly and in a subtler fashion have tracked the lively communication and cultural patterns across the region presenting a different and more textured picture, one that is not without optimism for change today. At the same time, as this report indicates, freedom of expression and trust in media operates on a spectrum that can shift with the relative optimism or pessimism people feel in the face of their daily lives and conditions in their country as well as the media they consume. At a time when media are under assault in much of the world, it is natural that these studies would reflect that changing temperature—and climate. As we have stated before and reiterate here based on continuing and new data and analysis—voices advancing freedom of communication are alive and well in the Middle East.

We welcome the continuing dialogue and feedback these reports have inspired and are hopeful that this one will do the same.

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EXECUTIVE SUMMARY

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

Cultural Attitudes[1]

- Fewer nationals now than in 2014 say films and TV content from the Arab region are good for morality, while the share of nationals who say such content from the U.S./Hollywood is good for morality has *increased*.
- A majority of Arab nationals say they prefer films that portray their own culture.
- However, a majority of nationals also say their culture should do more to integrate with modern society.
- Half of nationals say entertainment media challenge, rather than strengthen, cultural stereotypes.
- Most Arab nationals watch Arabic-language entertainment content, though more nationals now than in 2016 say some of their favorite TV shows are in another language.

Censorship & Digital Privacy

- Majorities of nationals in most countries support online freedom of expression generally; majorities of Qataris, Saudis, Lebanese, and Emiratis say it's OK for people to express their ideas on the internet, even if those ideas are unpopular. More Qataris express such support (68%) than do other nationals.
- And yet minorities of nationals in three countries—Qatar, Tunisia, and UAE—say people should be free to criticize governments online, whereas majorities of nationals only in Saudi Arabia and Lebanon say the same.
- Only in Egypt and Saudi Arabia do a majority of nationals say it is the responsibility of government to block objectionable content; in all other countries, a majority or a plurality says it is the responsibility of each individual to avoid objectionable content.
- Most nationals in all countries, except Tunisia, say films and other entertainment content should be banned if some people find them offensive.
- Majorities of nationals in four countries say concerns about privacy have changed the way they use social media, and this figure more than doubled since 2017 in six of seven countries surveyed (all but Egypt).
- More nationals say WhatsApp is the social media platform that provides the most privacy compared to other platforms (29% of nationals), and no other social media platform was chosen by more than 8% of nationals.

Media Use by Platform

- Use of media in the Arabic language has either increased or remained the same among Arab nationals. Approximately the same percentages of Arab nationals in 2018 say they watch TV, films, and read print materials in Arabic (92%, 87%, and 61%, respectively) as reported doing so in 2014, while the shares of nationals who listen to Arabic-language music increased in the same time period.
- More Arab nationals are paying for online media content. More nationals in 2018 than in 2016 say they paid for online music, sports, or film content in the past year, though the figures for each are below 10%.

1. Note some figures in this report do not include Egypt, Jordan, or Qatar, as officials in these countries did not permit the fielding of certain questions in some years of the Media Use in the Middle East study—Egypt and Jordan in recent years and Qatar only in 2013 and 2015. Excluded items mostly relate to censorship, government, politics, and religion. Additionally, while Jordan was surveyed in the 2013, 2017, and 2018 editions of the study, it was not included in the 2014, 2015, and 2016 editions. Therefore, Jordan data are not included when comparisons are made with the years in which Jordan was not surveyed. In all charts that do not include data from Egypt, Jordan, or Qatar, a footnote so reports.

- Slightly more nationals now say they read books, read newspapers, or read magazines than reported doing so in 2016. This may be partly related to the rapid increase in education among nationals in the surveyed countries; the percentage of nationals who say they completed a four-year college degree increased dramatically between 2014 and 2018 in four of seven countries: from 24% to 59% of Emiratis, 30% to 47% of Qataris, 5% to 20% of Tunisians, and 19% to 26% of Saudis.
- While movie cinemas struggle to attract audiences in many places in the U.S. and Western Europe, large percentages of Arab nationals in all countries, except Egypt and Jordan, go to the movies at least once a month; figures range from 24% of Lebanese to 59% of Emiratis.
- The percentage of Arab nationals who said they watched TV content on an actual television in the past six months dropped to 81% from 89% in 2016. However, the share of nationals who watched TV content on a phone in the last six months rose to 13% from 4% in the same period.

Online & Social Media

- Facebook penetration continues to fall among nationals in all countries. In 2013, 88% or more of internet users in these Arab countries used Facebook. In 2018, three countries reported Facebook penetration rates lower than 50%, including just 9% in Qatar, the lowest known figure in any high-income country.
- Other major platforms owned by Facebook also show signs of decline. WhatsApp penetration among internet users has fallen by 7 percentage points since 2015, and penetration rates for Instagram and Facebook Messenger both declined slightly since 2017 (by 3 and 4 points, respectively).
- Twitter penetration in Arab countries has plummeted. In 2013, 40% or more of internet users in five of the countries studied here used Twitter. Today, the same statement is true for only two of the countries, Saudi Arabia and the UAE, and even in those countries Twitter penetration dropped significantly in the past five years. Twitter penetration also dropped from 37% to 9% among internet users in Egypt from 2014 to 2018.
- Seven in 10 of all nationals use the internet in Arabic, while just 27% use the internet in English.
- The average number of hours Arab nationals spend with family and with friends online increased since 2017, while the amount of time nationals spend in person with family decreased during the same period.

Film

- The percentage of nationals who watch films in a cinema has increased in several countries since 2014 (UAE, Qatar, and Tunisia). Even in Saudi Arabia, where cinemas were only reintroduced to the public in April 2018, 42% of Saudis say they had recently seen a film in a cinema.
- Seventy-six percent of Saudis say they are likely to go to the cinema if/when there is one nearby.
- The percentage of Arab nationals who say they watch films in Arabic and English remains unchanged from 2014 to 2018, and Arabic films are still watched by twice as many nationals as are English films (Arabic: 87% in 2014 and 2018; English: 43% in 2014 and 44% in 2018).

TV

- The percentage of nationals who watch TV every day fell from 69% to 54% between 2014 to 2018. However, the share of nationals who watch TV at all was unchanged over the same time period (95% and 94%, respectively).
- Binge-watching TV/online content is reported by significantly more nationals now than in 2016 having increased from 32% to 40%. However, far fewer Arab nationals than people in the U.S. binge-watch content (76%).
- Most nationals in all countries, except Jordan, watch TV shows from their own country, and most nationals in all countries also watch TV shows from elsewhere in the Arab region (with Egypt and Tunisia as the only exceptions). Twenty percent or less of nationals in all countries watch TV programming from the U.S., and fewer than 10% in all countries watch content from Turkey (with Lebanon as the lone exception).
- Eighty-seven percent of the youngest nationals watch Arabic-language TV content, not much less than the same figure among the oldest respondents (92%).

Music & Podcasts

- Podcasts are popular among Arab nationals. Large majorities of Saudis and Emiratis listen to podcasts (68% and 64%, respectively), and 30% of both Qataris and Tunisians do so. The medium is less popular in Egypt, Jordan, and Tunisia.
- Arabic podcasts seem readily available. Seventy-five percent or more of nationals who use podcasts in five countries listen to Arabic content. Lebanese nationals listen to podcasts in English at the highest rate, 52%.
- Younger Arab nationals are more likely to listen to podcasts in Arabic than older nationals (under 45 vs. 45+).
- The percentage of nationals who post or comment about music online increased in most countries (specifically, the percent of nationals who posted/commented on music in the past month).
- Music videos on TV remain a popular means of listening to music. The youngest Arab nationals are the most likely age group to cite music videos as a favorite genre of TV (18-24 year-olds).
- Most nationals listen to music online, but only small percentages in each country pay to listen to music online (ranging from 1% to 11%).

Games

- Roughly the same percentage of nationals plays video games now as did in 2014, but many who play are devoting more time to it. Qatari gamers spent an average of 9 hours each week playing games in 2014, a number that increased 45% by 2018 to 13 hours. The time Lebanese gamers spend playing each week increased by 55%, from 11 to 17 hours.
- Nationals who play video games now say they spend more of that time playing alone rather than with others compared to 2014 (67% in 2018 vs. 49% in 2014), and those who do play with others now spend less of that time playing with others in-person and more time playing online with others than in 2014 (online: 51% in 2018 vs. 41% in 2014).
- Still, fewer than one in 10 video game players paid to access video games online in the past year.

Sports

- Three in 10 Arab nationals report attending a live professional football match in the last 12 months.
- More Arab nationals in 2018 than 2014 list sports as a favorite genre of TV and online video.
- More Arab nationals said they are willing to pay for sports content online in 2018 than in 2016.
- More Arab nationals in four of seven countries studied say they exercise at least once a week compared to 2014.
- In five countries, including 2022 FIFA World Cup host Qatar, more nationals prefer to watch a sporting event on TV/online rather than attend the same event. Only in Lebanon and Tunisia would more nationals prefer to attend the live event.
- A majority of nationals say they watched at least some of the 2018 World Cup. However, viewership in Tunisia and Qatar, which, respectively, played in the 2018 World Cup and will host the 2022 World Cup, was lower than several other countries.

News

- Seven in 10 or more of nationals in three countries say they often or sometimes encounter political news items online that appear entirely fake (Qataris, Lebanese, Saudis), this is equal to or more than the number of U.S. residents who say the same. This question was not permitted by officials in Egypt or Jordan.
- The share of nationals who say they watched news on TV in the past six months fell from 84% to 71% between 2016 and 2018.
- There appears to be no gender gap in news use. Roughly the same percentage of males and females say they accessed news on TV and online in the past six months (7 in 10 and nearly 1 in 2, respectively, for both genders).
- The proportion of nationals who trust news media, measured using Gallup question wording, fell significantly in six of seven countries since 2017. Only in the UAE did trust in news media stay the same, and in that country 90% of nationals reported such trust, far higher than in any other country. In two countries, Jordan and Tunisia, the share of nationals who trust news media fell below the level reported in the U.S. in 2018 (45%).
- More users of YouTube and Twitter say they use the platform to find/consume news (6 of 10 users of each platform) than users of any other platform. Half of Facebook users say they use that service to find/consume news.
- Nationals in all countries, except Qatar, estimate that more of the online video they consume is entertainment content versus news content. Only Qataris estimate that more of the online video they watch is news rather than entertainment.
- Large majorities of nationals from Arab Gulf countries surveyed say news media in their country are credible, while four in 10 or fewer nationals in Egypt, Jordan, Lebanon, and Tunisia agree. We replicated this question in the U.S. in November 2018 via The Harris Poll, and only 33% of U.S. residents surveyed said news media in that country are credible, nearly identical to the number of Jordanians who agreed with the statement and only slightly higher than Tunisians who concurred. Only in Egypt and Tunisia are rates of news credibility lower than in the U.S.

- However, minorities of nationals in five of the seven countries surveyed say media in their country can report news without interference from officials. The only countries where most nationals agree with this statement are Saudi Arabia and the UAE.

Focus on Qatar

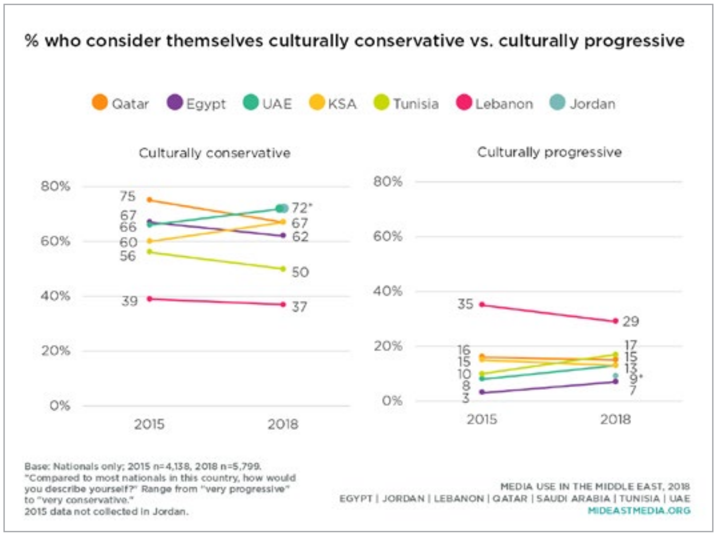
- Far more Qataris and Egyptians than nationals in other countries say they feel comfortable speaking out about politics, a figure that skyrocketed in Qatar from 23% to 72% between 2017 and 2018; the question was not permitted by officials in Egypt in 2017. Such an increase likely has numerous causes, though it's worth stating that 2017 Qatar data were collected just before the Saudi-led blockade of Qatar began, while 2018 data were gathered in Qatar about one year into the blockade.
- There have been dramatic increases among Qataris agreeing with other statements about free speech. The share of Qataris who say people should be able to criticize governments online rose from 19% to 48% between 2017 and 2018, and the proportion of Qataris who say that on the internet it is safe to say whatever one thinks about politics quadrupled from 13% to 51% since 2017.
- Qataris spend more time each week online with friends (on average 22 hours) than any other Arab nationals surveyed.
- Only in Qatar does a sizeable proportion of nationals use Netflix (30%). In all countries, Shahid is the clear leader in streaming market share, though about one in three Qataris also use Shahid.
- Since 2014, there has been a huge drop in the share of Qataris who say entertainment content from other Arab countries is good for morality (60% in 2014 to 24% in 2018), a figure that fell in other countries, though not as steeply.
- Qataris who play video games estimate that half of the time they spend playing is with other people, a significantly higher share of time than that reported by any other nationals.
- One in six Qataris paid to access sports online in the past year, more than the percentage of nationals in all other countries except Saudi Arabia (where 1 in 6 also paid for such content in the same time period).

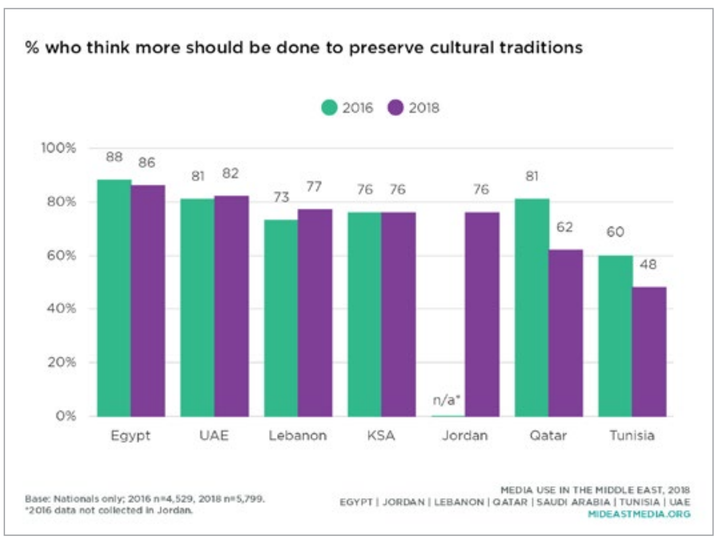
CULTURAL ATTITUDES

In this chapter

- Cultural preservation and modernity
- Ramadan media use
- Culture as entertainment
- Global influences in entertainment

Cultural preservation and modernity





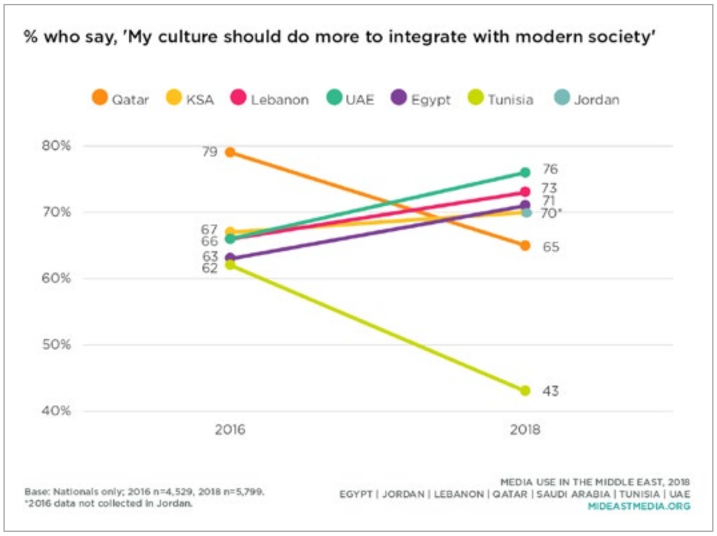
Most nationals in all countries, except Lebanon, self-identify as culturally conservative. Seven in 10 Jordanians, Qataris, and Saudis—and six in 10 Egyptians—say they are either somewhat or very culturally conservative compared to other nationals in their country. Lebanese self-identify as culturally conservative, progressive, or neither with near equivalent frequency.

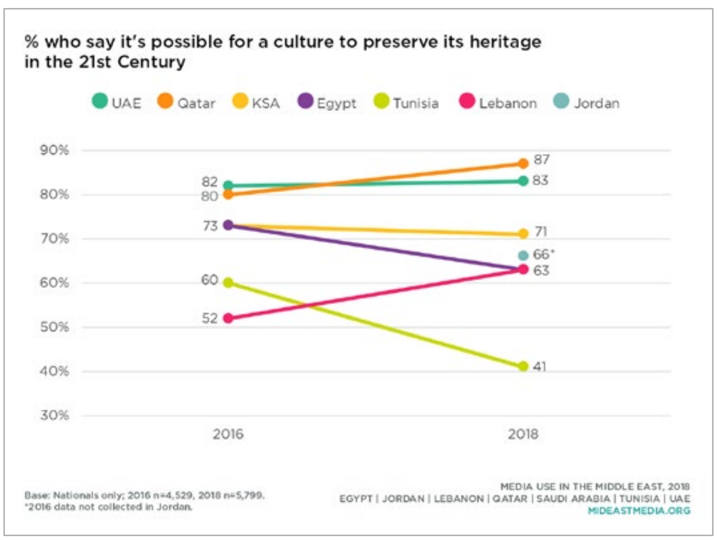
From 2017 to 2018 the proportion of cultural conservatives grew in five of the seven surveyed countries. This proportion grew somewhat in Jordan and by 20 percentage points or more in Egypt, Qatar, and Saudi Arabia. This could indicate that nationals in these countries are either becoming more conservative or nationals feel their compatriots are more comparatively liberal, or some combination of both.

Older Arab nationals are more likely to consider themselves culturally conservative than younger Arab nationals, but even half of the youngest respondents describe themselves as conservative (52% 18-24 year-olds, 56% 25-34 year-olds, 59% 35-44 year-olds, 66% 45+ year-olds). That said, nearly three times as many of the youngest cohort as the oldest age group identify as culturally progressive (21% 18-24 year-olds, 18% 25-34 year-olds, 12% 35-44 year-olds, 8% 45+ year-olds).

Arab nationals simultaneously want both greater preservation of their own culture while also saying their culture should do more to embrace modernity. Large majorities of nationals in five countries, at least three-fourths, say more should be done to preserve cultural traditions.

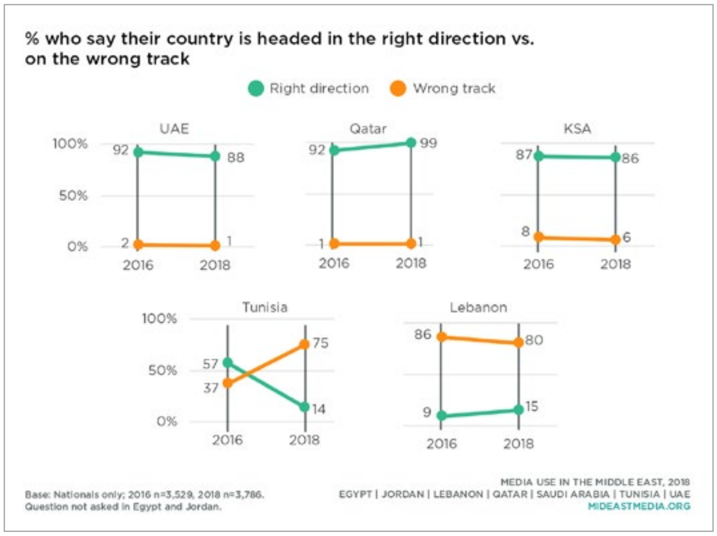
At least two-thirds of nationals in all countries, except Tunisia, say their culture should do more to integrate with modern society. Still, agreement with this statement dropped significantly since 2016 among Qataris and Tunisians, while increasing among Egyptians, Lebanese, and Emiratis.





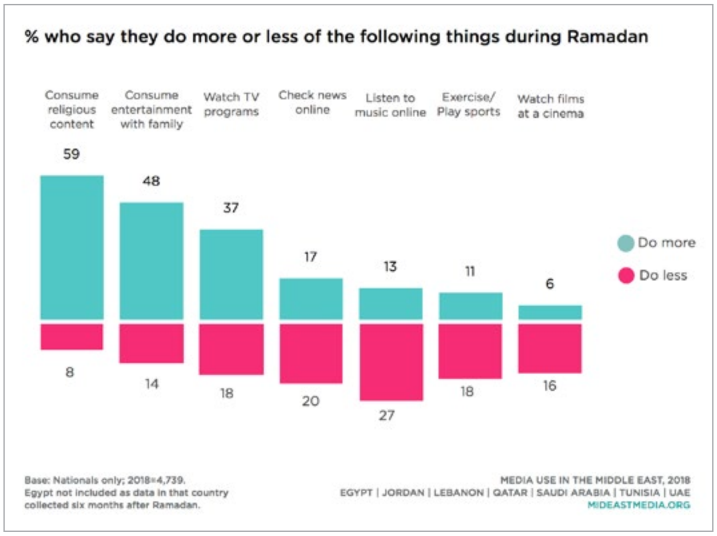
Cultural conservatives and progressives do not differ much in attitudes about preserving cultural traditions or increasing integration with modernity. Between six and seven in 10 of both conservatives and progressives say more should be done to preserve cultural traditions and also that their culture should do more to integrate with modern society (preserve cultural traditions: 74% conservative, 64% progressive; integrate with modern society: 64% conservative, 67% progressive). Fewer of the least-educated nationals (primary school or less) favor more cultural integration with modernity, but still more than half of them agree (55%).

More than half of nationals in all countries say preserving culture in modern times is possible, and agreement is highest in Qatar and the UAE. Tunisia is a lone outlier, as just four in 10 agree—a significant decline since 2016.



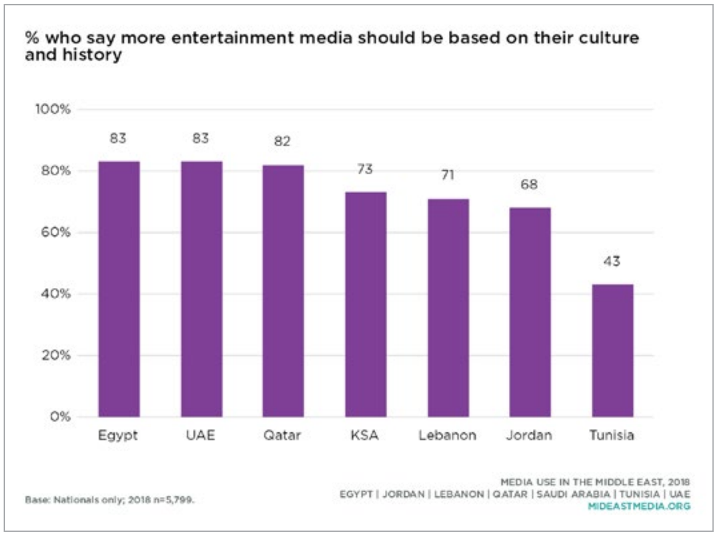
Clear majorities of Emiratis, Saudis, and Qataris say their respective country is headed in the right direction, figures that have changed little in each country since 2013. Conversely, approximately eight in 10 Lebanese and Tunisians say their country is off on the wrong track. This question was not permitted by officials in Egypt or Jordan.

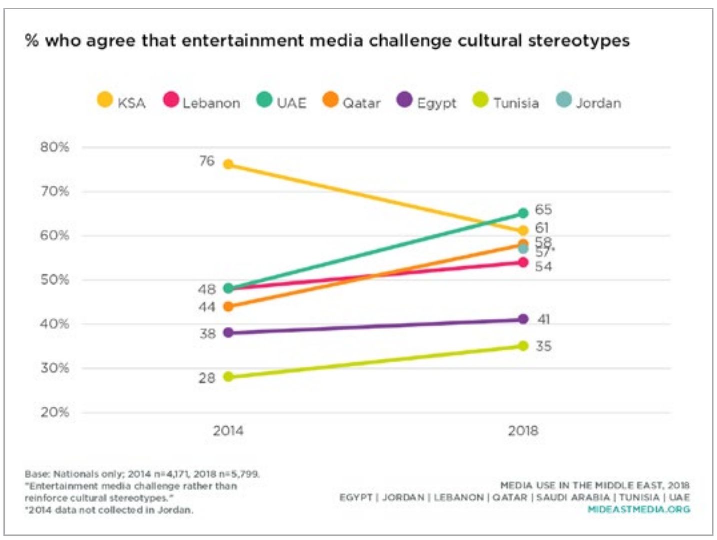
Ramadan media use



During Ramadan, content preferences shift, as a majority of Arab nationals report accessing more religious content, and close to half consume more entertainment content with family. Nearly four in 10 Arab nationals increase their TV use.

Culture as entertainment

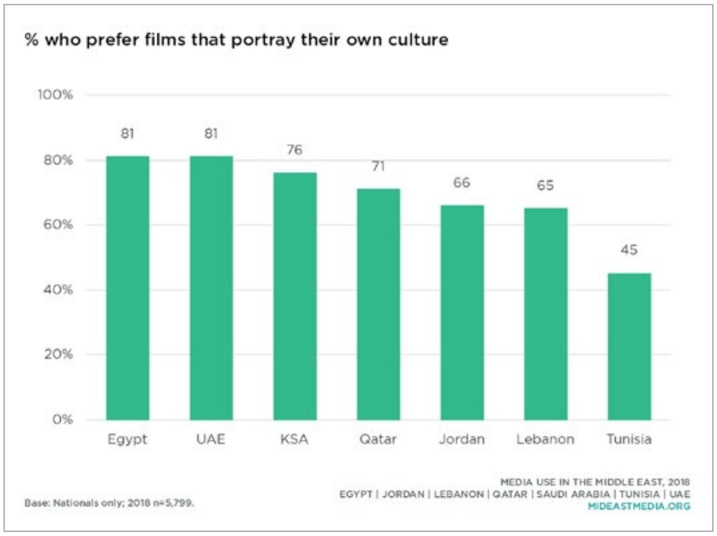




Concerning entertainment attitudes, at least two-thirds of Arab nationals, again except for Tunisia, say more entertainment media should be based on their history and culture. Egyptians, Emiratis, and Qataris are the most likely to agree.

Additionally, majorities of nationals in most countries think entertainment media challenge cultural stereotypes, a more common sentiment in most countries over the past four years. Still, fewer than half of Tunisians and Egyptians agree.

About half of both cultural conservatives and progressives say entertainment media challenge cultural stereotypes (50% conservative, 48% progressive).

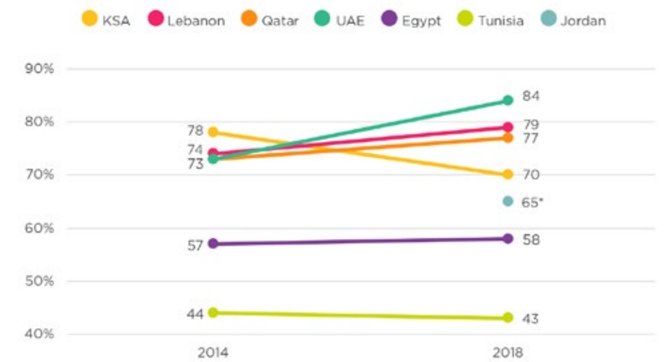


Most nationals in all countries, except Tunisia, say they prefer watching films about their own culture and that films are an important source of information about one's own culture.

While cultural progressives are a bit less likely than conservatives to prefer films about their own culture, more progressives than conservatives say films are an important source of information about one's culture (I prefer to watch films that portray my own culture: 70% conservative vs. 57% progressive; films are an important source of information about one's own culture: 58% conservative vs. 64% progressive).

Global influences in entertainment

% who say people benefit by watching content from different parts of the world



Base: Nationals only; 2014 n=4,171, 2018 n=5,799.
*2014 data not collected in Jordan.

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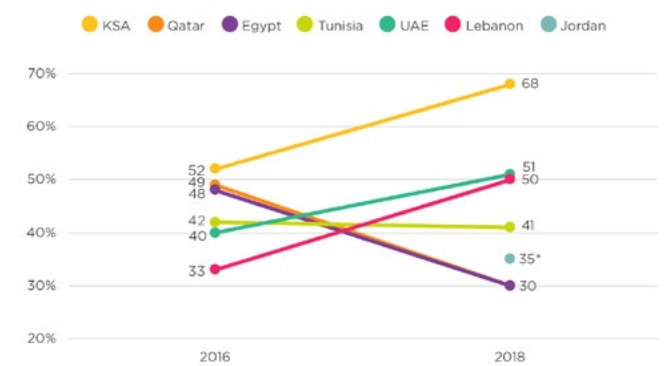
% who say some of the films/TV programs they would like to watch are not available in their country



Base: Nationals only; 2016 n=4,529, 2018 n=5,799.
*2016 data not collected in Jordan.

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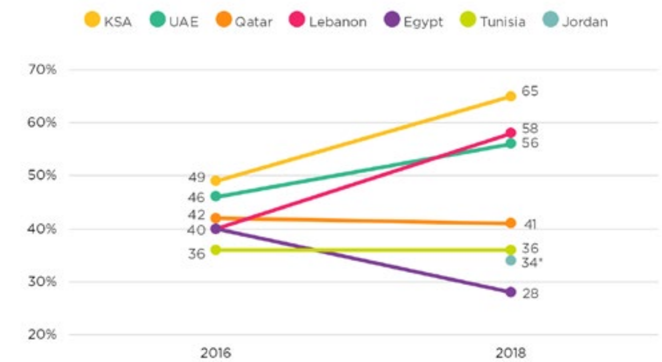
While Arab nationals prefer entertainment content about their own culture, most nationals in all countries also say people benefit from watching entertainment content from other parts of the world, including at least seven in 10 Emiratis, Lebanese, Saudis, and Qataris (Tunisia, at 43% agreement, is again the lone holdout).

Growing percentages of Lebanese, Emiratis, and Saudis say some of the films and TV programs they would like to watch are not available in their country. The proportion of Qataris and Egyptians who agree with this statement dropped sharply since 2016.

% who say some of their favorite TV shows are in a language other than Arabic



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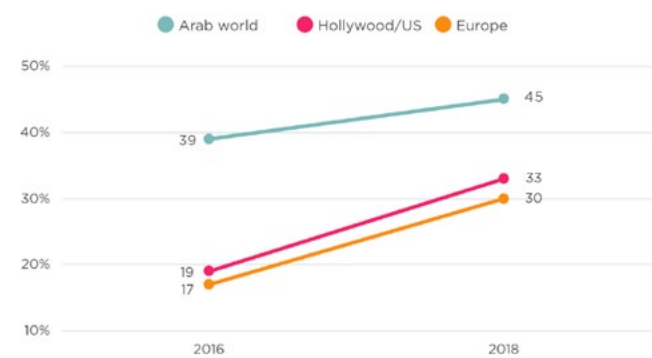
% who say films/TV programs from the following locales are good for morality



Base: Nationals only; 2016 n=4,529, 2018 n=4,846.
Jordan not included in calculations as 2016 data not collected in Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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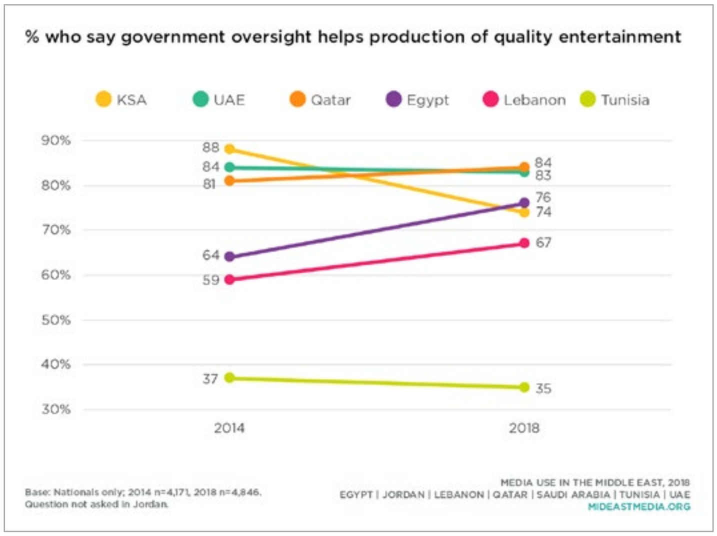
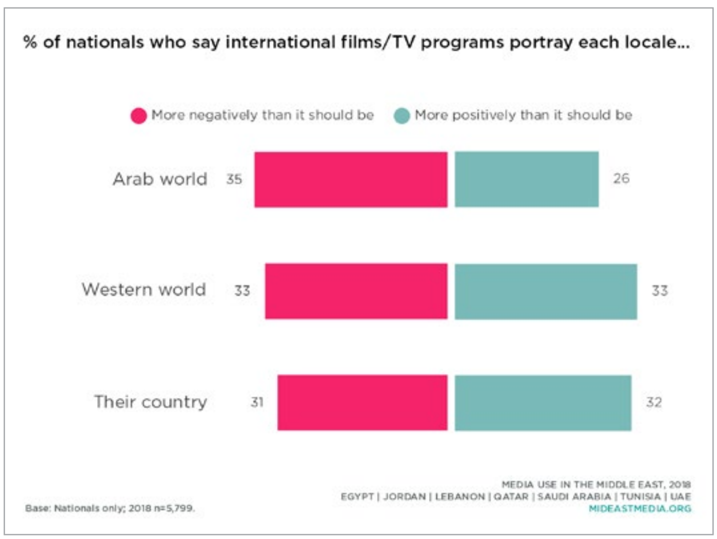
At least a third of nationals in each country say some of their favorite TV shows are in a language other than Arabic. This figure grew to over half of Emiratis and Lebanese and to nearly two-thirds of Saudis, between 2016 and 2018. The one exception is Egypt where fewer than three in 10 agree—a sharp decline from 2016.

Cultural progressives are more likely than cultural conservatives to say some of their favorite TV programming is in a language other than Arabic (54% progressive vs. 41% conservative).

Arab nationals were significantly more likely in 2018 than in 2016 to say that films and TV from the U.S. and Europe are good for morality, while they are only marginally more likely to say films and TV from Arab countries are good for morality. Still, in 2018, more nationals overall say that entertainment content from Arab countries is good for morality than say entertainment content from the U.S. bolsters morality. Egyptians stand out as being far more likely—three times more—to say entertainment from the U.S. and Europe are bad for morality than good for morality, representing a significant increase since 2016 in the number of Egyptians who say film and TV from these locales are bad for morality,

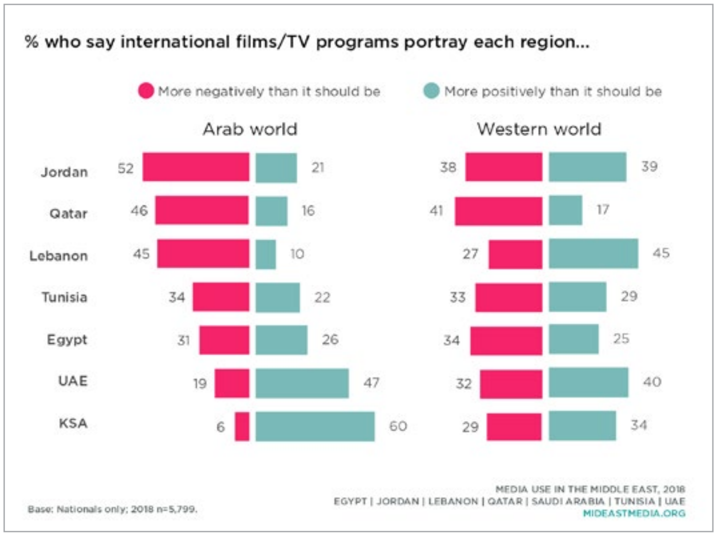




Cultural conservatives are as likely as cultural progressives to say Arab entertainment content is good for morality, but they are less likely than progressives to say content from the U.S. and Europe are good for morality (films and TV from the Arab world in general are good for morality: 46% progressive vs. 46% conservative; from Hollywood/US: 42% progressive vs. 30% conservative; from Europe: 39% progressive vs. 27% conservative).

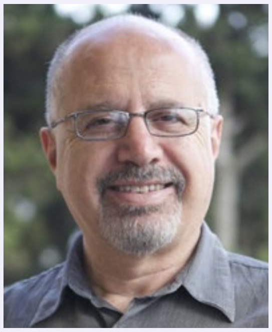
At the same time, nationals in all countries, except Tunisia, tend to agree that government oversight improves the quality of entertainment. Similar numbers of cultural conservatives and progressives agree (52% conservative, 53% progressive).

When asked about the portrayal of various locales in international film and TV, there is some variation across countries. Nationals in Arab Gulf countries are more likely to say their country is portrayed too positively than to say it is represented too negatively, while the opposite is true for nationals from the middle income countries—Lebanon, Tunisia, Egypt—who are more likely to say their country is portrayed too negatively.



Saudis and Emiratis are more likely than other nationals to say international TV and film portray the Arab world too positively, rather than too negatively, by more than two to one compared with other nationals. Perceptions of how they portray the Western world are fairly evenly split in most countries, except in Qatar and Egypt where nationals more often say the Western world is portrayed too negatively and in Lebanon where more nationals say the Western world is portrayed too positively.

Nationals with more education are more likely than less-educated nationals to say both their own country and the Western world are portrayed more positively than they should be (country of residence: 24% primary or less, 28% intermediate, 33% secondary, 34% university or more; Western world: 18% primary or less, 30% intermediate, 35% secondary, 39% university or more).



GLOBAL ENTERTAINMENT GIVEN A PASS, EVEN A BOOST, DURING MEDIA PUSHBACK

Commentary by Shibley Telhami
University of Maryland

A counter-revolution has been in full force in many parts of the Arab world in the past few years. Nowhere is this more visible than in the pushback against free media, both traditional and digital. It's true of course that media has always been either a political instrument or a target of rulers. However, the pushback that followed the Arab uprisings was more deliberate than ever; rulers and the elites around them, who have survived or recovered from the revolutionary popular revolts that began in 2010, have concluded, not incorrectly, that the information revolution—a mixture of transnational satellite television stations, the internet, and social media—has been a key factor in unleashing the masses. Sure, the public grievances had deeper economic, political, and social roots of discontent, but nothing that had not been experienced in the past; the information revolution thus explains at least the timing of the uprisings and why rulers were taken by surprise, unable to react quickly enough to mass protests. Not only has this revolution led to Arab public empowerment, but it was also instrumental in getting people out into the streets in threatening numbers without the need to rely on traditional political and social organizations. Thus, given this common conclusion about the role of media, when it comes to news and to sharing political opinions freely, many parts of the Arab world are in the middle of a dark chapter that's even darker than during the period preceding the Arab uprisings.

This, however, does not apply to entertainment, including Western entertainment. In part, entertainment has always been seen by rulers as something that distracted from politics and was thus less threatening. Moreover, many of the ruling elites in much of the Arab world see Islamists as a threat, as they tend to be more traditional and less welcoming of some forms of entertainment, including Western entertainment. The public has generally been receptive to more entertainment choices, including from the West. In this regard, the data here shed new light on this issue, particularly in mapping out change over time.

Broadly, even as most Arabs prefer watching films about their own culture, majorities in most countries say people benefit from watching entertainment content from other parts of the world—despite the finding that in all countries but Lebanon, majorities consider themselves more culturally conservative than others. Strikingly, Arab nationals are more likely now than in 2016 to say films and Western TV programs are 'good' for morality. Still, these are results that require explanation.

Majorities in all but one country (Tunisia) say that people benefit from watching content from different parts of the world, but the biggest drop from 2014 to 2018 was in Saudi Arabia (from 78% to 70%). This period coincides with the rise of cultural and social liberalization steps undertaken by the Saudi government, which emphasized these dimensions of reform, even as it clamped down on political opposition and free speech. Some of these high-profile steps included opening movie theaters and hosting musical performances by international artists. One might thus expect that there would be some pushback from conservatives, which may explain the drop. Similarly, Saudi Arabia is the only country with a noticeable drop in the number of people who say government oversight helps production of quality entertainment, from 88% in 2014 to 74% in 2018.

Asking if one's country is headed in the right or wrong direction is a tough question, as this poses a potential challenge to authoritarian governments' narratives, so public responses may be guarded. In Egypt and Jordan, this question was not even permitted. Overall, there has been little change from 2016 to 2018 in the perceptions of the direction that the countries are moving. The one exception is in Tunisia, where there was a sizable drop in the number of people who said their country is moving in the right direction, from 57% in 2016 to 14% in 2018. This is a striking finding.

Tunisia is where the Arab uprisings began, and it has been seen by many, especially in the West, as the most successful case of the Arab uprisings. It has avoided large-scale violence, undergone open elections, put in place a constitution with liberal elements, and has had a more permissive environment for free speech and media than most other Arab countries. However, a lot has changed in recent months. The internal political balance has shifted, and the government's failure to improve the economy—especially for the very young people who spearheaded the initial uprisings—has led to new, widespread protests.

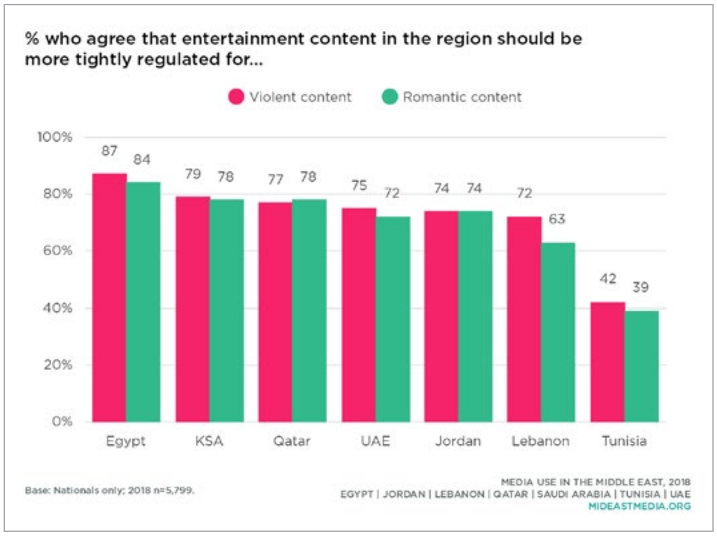
A month after former president Zine El Abidine Ben Ali fled Tunisia, I flew to Tunis in February 2011 to participate in a special episode of the Doha Debates, even as public demonstrations continued. The motion on the table was this: "This House believes that Arab revolutions will just produce different dictators." In the debate, I took the opposite position of the motion, arguing that the information revolution has ushered in a new era of public empowerment that is difficult for rulers to reverse. A large Tunisian audience was polled at the end of the debate on whether they agreed with the pessimistic motion. A majority opposed the motion, reflecting a sense of optimism that was sensed well beyond Tunisia's borders. That Tunisia today is the place where the public is especially pessimistic about the direction of the country, where 75% of those polled say the country is on the wrong track, is very telling indeed—and not in a good way.

CENSORSHIP & DIGITAL PRIVACY

In this chapter

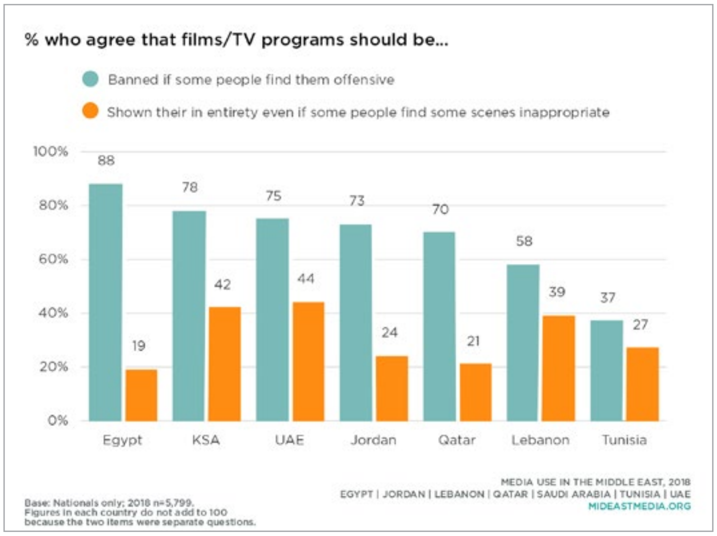
- Attitudes about censorship
- Internet regulation and free speech
- Worry about online surveillance

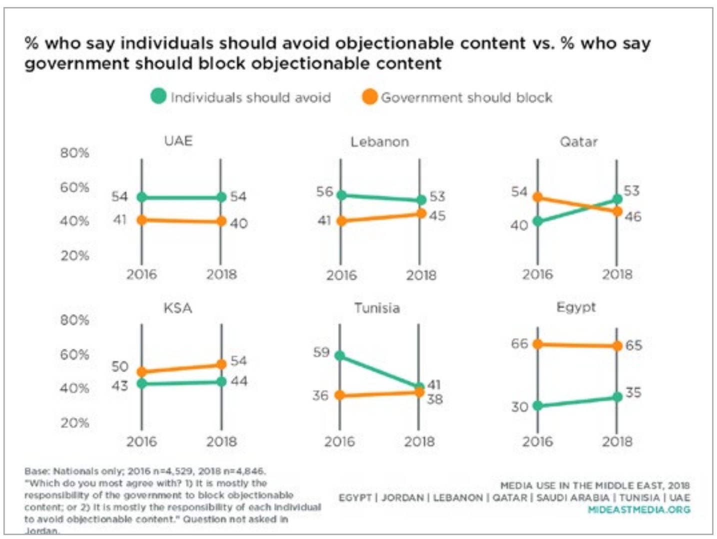
Attitudes about censorship



Large majorities of Arab nationals in each country, except Tunisia—about three-quarters or more of other nationals—believe entertainment media in the Arab region should be more tightly regulated for both violent and romantic content. Only four in 10 Tunisians agree, but it is still a sizeable minority.

Similar proportions of nationals also say films or TV programs other people find offensive should be banned—at least 70% of Saudis, Emiratis, Egyptians, Jordanians, and Qataris, and nearly as many Lebanese support such bans. Likewise, only a minority of nationals say films or TV programs should be shown in their entirety even if some people find them offensive. No more than roughly four in 10 Saudis, Emiratis, and Lebanese, and only about a quarter of Jordanians, Qataris, and Tunisians—and even fewer Egyptians—say potentially offensive content should remain available to the public.

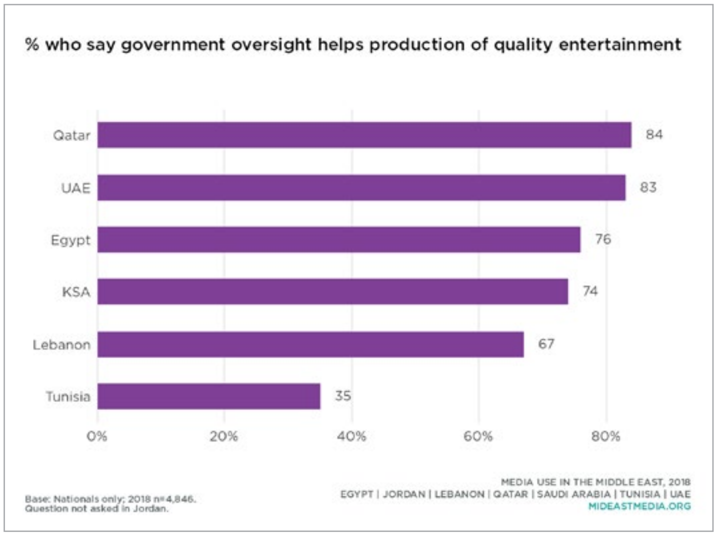


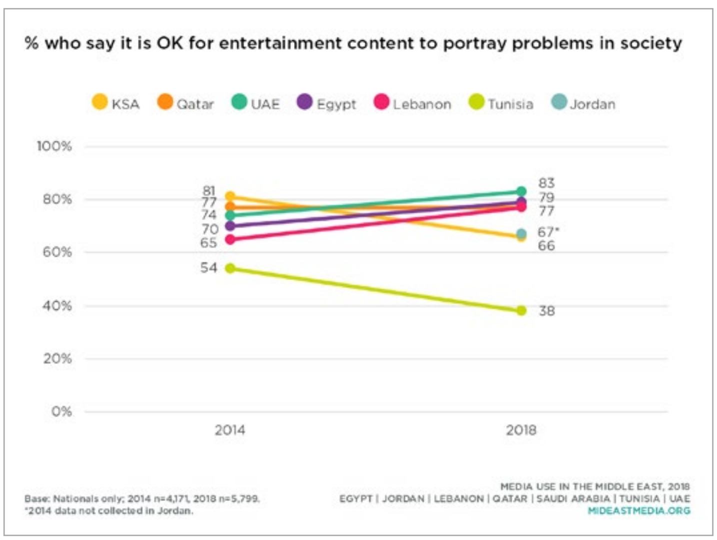


However, there has been a small decline since 2014 in the share of nationals that supports banning some films or TV programs and a modest increase in the proportion that supports showing entertainment in its entirety even if it has potential to offend (films or TV should be banned if offensive: 70% in 2014 vs. 65% in 2018; show entertainment in entirety even if offensive: 27% in 2014 vs. 31% in 2018).

Culturally conservative nationals are more likely to favor censorship than are their progressive counterparts—about seven in 10; still, about half of progressives also advocate tighter regulation of violent and romantic content as well as support deleting scenes or banning programs seen by some people as offensive.

There is no clear consensus on who should be responsible for regulating objectionable media content, individuals themselves or governments. More nationals in most countries say it is mostly the responsibility of individuals to avoid objectionable media content rather than the government's responsibility to block objectionable content, though by modest margins. Only in Egypt and Saudi Arabia do more nationals say governments bear responsibility to regulate potentially offensive content than say individuals should make such decisions themselves.



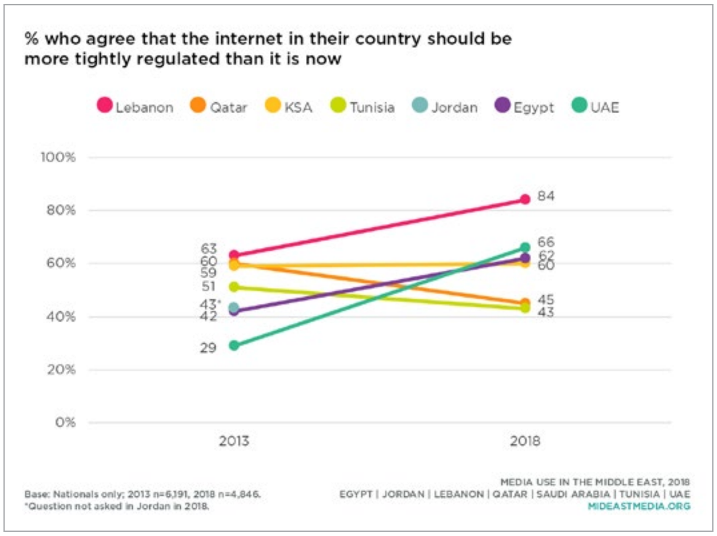


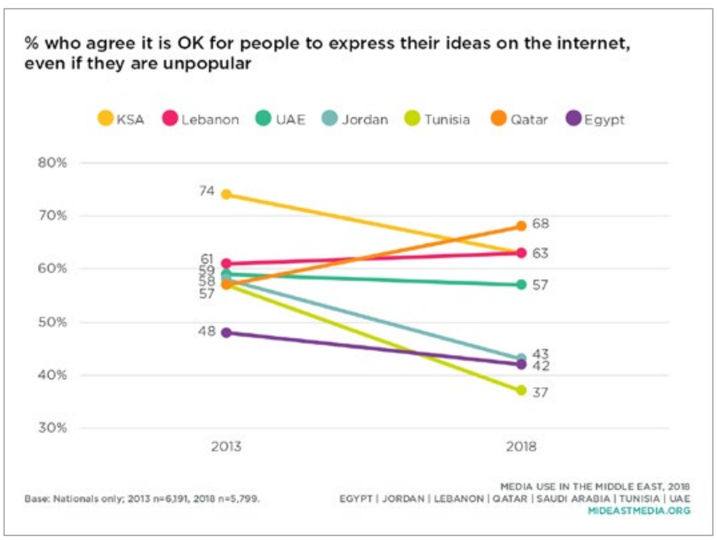
Most nationals with children in the household—three-fourths or more, except Tunisia—want the government to do more to protect children from potentially offensive entertainment content (93% Egypt, 81% Qatar, 80% KSA, 80% UAE, 73% Lebanon, 43% Tunisia).

The vast majority of Arab nationals say government oversight bolsters the quality of entertainment content; at least two-thirds of nationals in every country, except Tunisia, express this belief, especially Egyptians, Qataris, and Emiratis.

Two-thirds or more of nationals in most countries, and four in 10 in Tunisia, say it's OK for entertainment content to portray problems in society.

Internet regulation and free speech

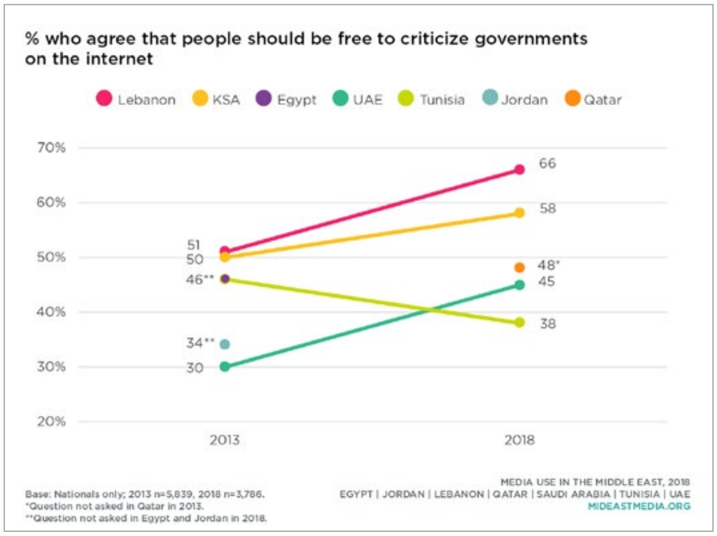


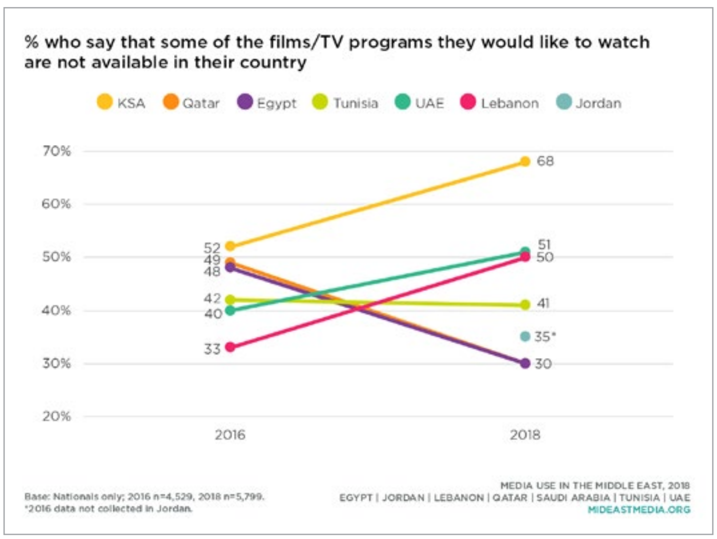


Clear majorities of nationals in four countries—Egypt, Lebanon, UAE, and Saudi Arabia—want more internet regulation in their countries, while just over four in 10 Qataris and Tunisians also support greater internet regulation.

In *Media Use in the Middle East, 2017*, respondents in the same countries surveyed in 2018 were asked what kind of internet regulation they would favor. Six in 10 nationals said they wanted more internet regulation for privacy protections, while less than half said they wanted online political content to be more regulated (47%). Large numbers of respondents in several countries also said they wanted the internet more regulated in their country in order to make it affordable (in Lebanon one gigabyte of mobile data costs around $40 USD). To many respondents in that year's survey, then, internet regulation meant providing more access to the internet, not less.

Compared to 2013, nationals in the seven countries surveyed in 2018 vary more in their support for online freedom of speech. Fewer Tunisians, Egyptians, and Jordanians in 2018 than 2013 say that people should be able to express themselves online even if their ideas are unpopular, leaving less than half of nationals in each of these countries who agree. Majorities of nationals in all other countries say people should be able to express unpopular ideas online. The highest support for free speech online as of 2018 was in Qatar, where nearly seven in 10 nationals agree people should be able to express unpopular sentiments online.





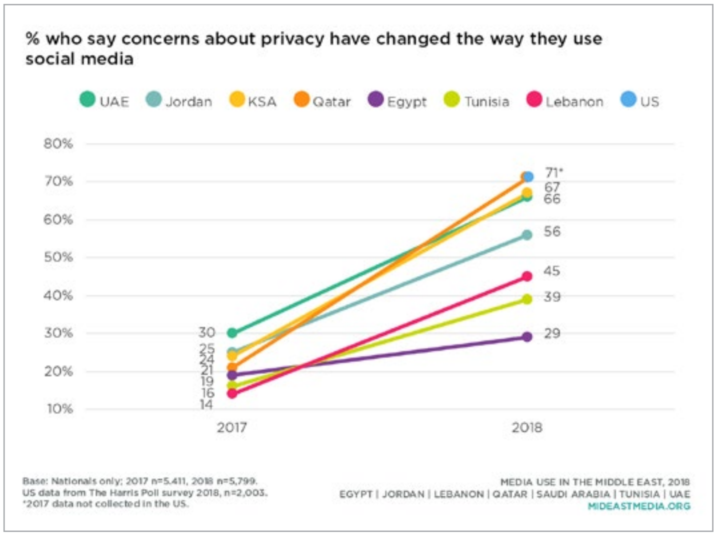
Between 38% and 66% of nationals in each country say people should be free to criticize governments on the internet (the low is in Tunisia, high in Lebanon), figures which have increased in Lebanon, Saudi Arabia, and the UAE since 2013. Support for this form of free speech declined in the same period in Tunisia, however. This question was not permitted by officials in Egypt or Jordan.

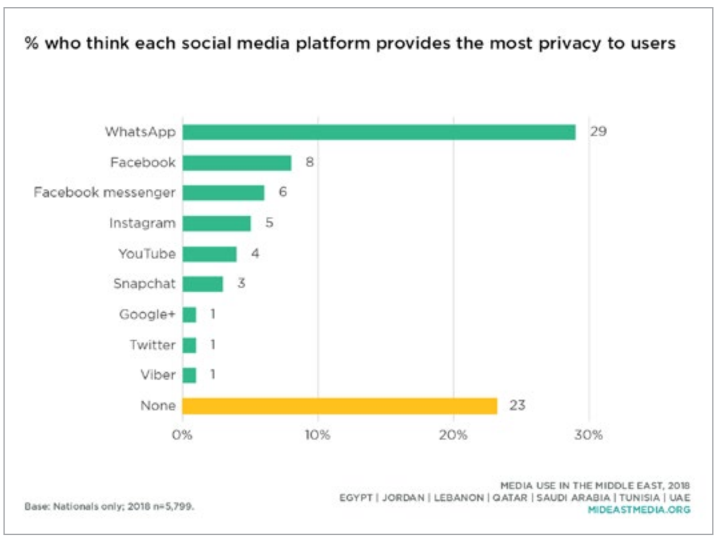
In 2018, fewer nationals in the countries surveyed—half or less—say it's safe to say on the internet whatever one thinks about politics, a decline since 2013 in all countries except the UAE (KSA: 58% in 2013 vs. 53% in 2018, Lebanon: 47% vs. 42%, Tunisia: 46% vs. 32%, UAE: 41% vs. 44%). This question was not permitted by officials in Egypt or Jordan in 2018 or in Qatar in 2013.

Majorities of Saudis, Emiratis, and Lebanese say some of the films and TV shows they want to watch are not available in their country—an increase of 10 percentage points or more in each of these countries between 2016 and 2018. Qataris and Egyptians are the least likely to say content they want to watch is unavailable in their country, and figures have fallen in both countries since 2016.

Younger nationals, VPN users, and cultural progressives are more likely to say content they want to watch is unavailable in their country than are older respondents, non-VPN users, and cultural conservatives (age: 50% 18-24 year-olds vs. 34% 45+ year-olds; VPN use: 56% yes vs. 45% no; cultural position: 51% progressive vs. 41% conservative).

Worry about online surveillance



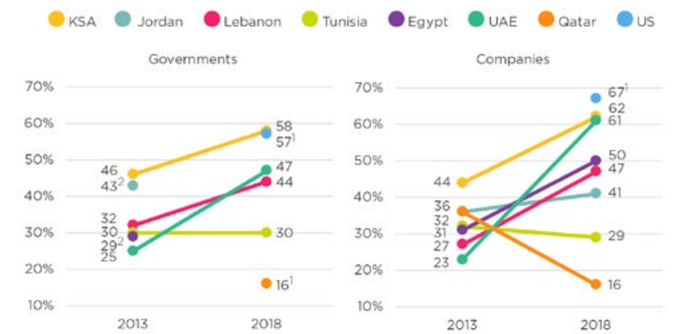


Increasing percentages of Arab nationals express concern about online privacy and surveillance, and this seems to affect their online behavior or at least their perceptions of their online behavior. Nearly half of all nationals—up from two in 10 in 2017—say online privacy concerns have led them to change the way they use social media. Sharp increases were observed in all countries. This question was replicated by The Harris Poll and Northwestern University in Qatar in the U.S. in November 2018 for comparison purposes, and seven in 10 U.S. residents also say they changed social media behavior due to privacy concerns, which is similar to the figures among Saudis and Qataris.

More highly educated nationals than less-educated nationals say they have changed their social media behaviors due to privacy concerns, but still one-fifth with a primary education or less say they altered their social media use for privacy reasons (21% primary or less, 39% intermediate, 51% secondary, 58% university or higher). Self-described cultural conservatives are more likely than cultural progressives to have altered social media behaviors for privacy reasons (52% conservative, 42% progressive).

Internet users who say they are worried about governments and companies checking what they do online are far more likely to have changed their social media behavior than those who are not concerned about such surveillance (I am worried about governments checking what I do online: 74% of those who agree vs. 43% of those who disagree say they have changed the way they use social media due to privacy concerns; I am worried about companies checking what I do online: 75% vs. 41%).

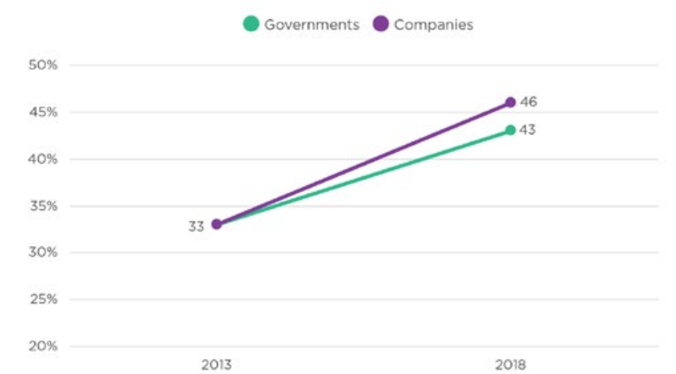
% who are worried about governments and companies checking what they do online



Base, Governments: Nationals, internet users; 2013 n=3,046, 2018 n=3,362.
Base, Companies: Nationals, internet users; 2013 n=3,342, 2018 n=4,694.
US data from The Harris Poll survey, 2018, n=2,003.
[1] Question not asked in Qatar and US in 2013.
[2] Question not asked in Egypt and Jordan in 2018.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

% who are worried about governments and companies checking what they do online



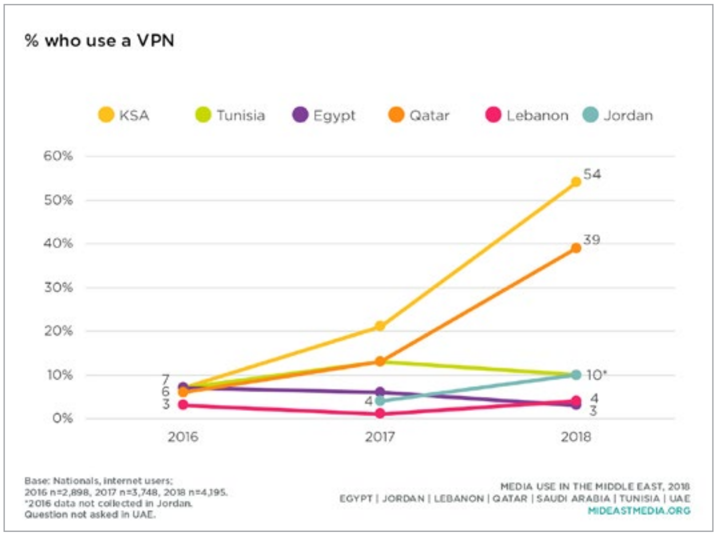
Base: Nationals, internet users; 2013 n=2,314, 2018 n=3,220. Egypt, Jordan, and Qatar are not included in the calculations as question not asked in Qatar in 2013 and in Egypt and Jordan in 2018.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

While no single social media platform is seen as a leader in terms of privacy safeguarding, a plurality of nationals—29 percent—say WhatsApp is the service that affords the most privacy. Notably, about one-quarter of nationals declined to cite any one network as the most private, perhaps reflecting a lack of confidence that social networks protect privacy generally.

Concern about online surveillance by both governments and companies varies widely by country. More Saudi, Emirati, and Lebanese internet users than other nationals worry about both governments and companies monitoring their online behavior, figures that rose significantly since 2013. About one in three Tunisian internet users expressed the same concerns, a figure unchanged since 2013.

Fewer Qataris than other nationals are worried about either governments or companies surveilling them online. U.S. residents are more concerned than Arab nationals about companies checking their online activities and are on par with Saudis with regard to concern about government surveillance.



There were large increases between 2017 and 2018 in the percentages of Saudis and Qataris who use a VPN—now at 54% and 39%, respectively—but figures are much lower among nationals in the other countries in the study, 10% or fewer nationals.

Younger and more highly educated nationals are more likely to use a VPN (age: 21% 18-24 year-olds, 17% 25-34 year-olds, 16% 35-44 year-olds, 14% 45+ year-olds; education: 17% university or higher, 20% secondary, 8% intermediate, 7% primary or less).

Nationals who say privacy concerns have changed the way they use social media are more than three times as likely to use a VPN as those who say they haven't changed their online behavior (25% vs. 7% use a VPN). Additionally, internet users who are worried about government surveillance online are more likely to use a VPN than those who are unconcerned about surveillance (29% vs. 19%, respectively).

DIGITAL PRIVACY AT RISK IN A POST-BLOCKADE MIDDLE EAST

Commentary by Kristian Ulrichsen
Rice University

The political polarization in large parts of the Middle East is reflected in several of the 2018 findings on how people in the region perceive issues that pertain to censorship and digital privacy. The results indicate not only a significant divergence in public attitudes toward freedom of expression across countries but also a sharp increase in concerns about digital privacy and online surveillance. While such patterns are observable over a five-year period since 2013, there has been an especially noticeable jump in several indicators since 2017, illustrating the depth of concern many in the Middle East have on these issues.

With many governments in the Middle East appearing more authoritarian today than they did in 2011, the 'post-Arab Spring' landscape finds expression in greater concern about government surveillance as well as wariness of presenting views openly on social media and the internet more generally.

Many more people in 2018 are worried about governments and companies checking their online activity than in 2013, with Lebanon showing that such concerns are not limited to Gulf States (Saudi Arabia and the UAE). This likely reflects greater awareness of privacy and surveillance in the wake of high-profile cases where people have been detained and prosecuted under expansive new cybercrime and terrorism legislation that has been passed in recent years.

There are some interesting differences in how respondents perceive various aspects of freedom of expression, with a clear downward trend over five years in support of people expressing their ideas on the internet versus a broadly upward trend in those who feel people should be free to criticize governments online. This is most pronounced in Saudi Arabia and illustrates the complexity of social issues facing Crown Prince Mohammed bin Salman as he consolidates political authority in the Kingdom.

Inevitably, rising awareness of the darker side of internet use has translated into differences in the ways people in the Middle East engage with each other online and interact on social media. In every state, concerns for privacy have dramatically changed the way people use social media, which has resembled a toxic battleground of accusation and abuse both by human users and electronic bots.

The proportion of respondents using a VPN more than doubled in Saudi Arabia and Qatar between 2017 and 2018 while WhatsApp was by far the most trusted social media platform in terms of privacy for users. The online 'free-for-all' that characterized social media use during and immediately after the Arab Spring has given way to deep mistrust of most platforms and acknowledgment that online interaction carries costs as well as benefits.

Several factors may account for the far higher use of VPNs in the Gulf States compared with elsewhere in the Middle East. There is a greater level of surveillance in the Gulf that intersects with an increased sensitivity over what is 'safe' to say and do in settings most assume are open to penetration by security forces. The hacking incidents that preceded and accompanied the outbreak of the Gulf crisis between Qatar and three regional neighbors in June 2017 provided visible reminders of the need for added security in internet use.

These 2018 findings provide the first real snapshot of opinion since the Gulf crisis began. Already, several clearly diverging trajectories emerge. There has been a broad rise in support in Qatar for free speech online which contrasts with the downward trajectories in Saudi Arabia, the UAE, and Egypt—three of the four states that cut ties with Qatar in 2017. This is consistent with observable notions that Qatar has responded to the crisis by becoming more open as a society while political repression in Egypt, the UAE, and Saudi Arabia has intensified.

A finding that cuts across sub-regions in the Middle East is broad support for tighter regulation of entertainment, probably because every country has socially conservative constituencies. However, this consensus breaks down with questions about tighter regulation of the internet. Significant increases in support for tighter internet regulation in Egypt and the UAE track the authoritarian turn in both countries, but there is no change in support in Saudi Arabia, despite the political crackdowns since 2017.

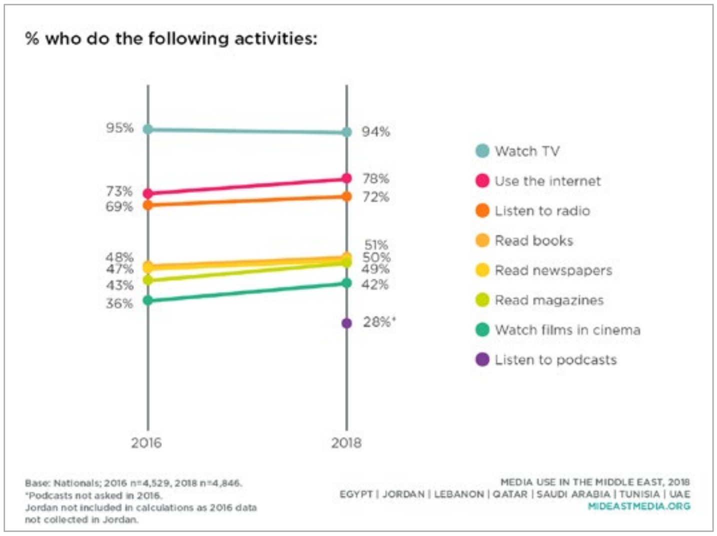
Throughout the Middle East, people are more concerned than ever about the possibility of intrusive state monitoring of online and social media activity. That some of the notable increases in concern are in Lebanon should caution observers from imagining that this is a phenomenon mostly rooted in the Gulf, although rising Gulf influence in Lebanon since 2013 may be feeding into these results.

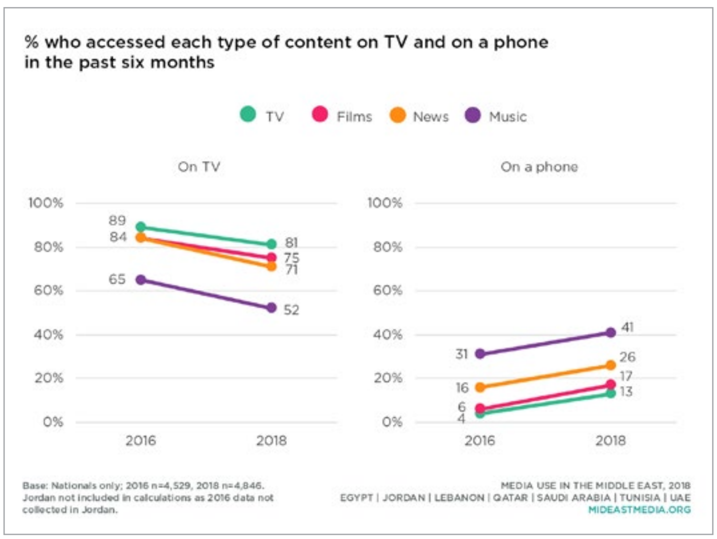
MEDIA USE BY PLATFORM

In this chapter

- Media platforms for entertainment
- Language preferences
- Paying for and sharing online content
- Socializing with others in-person and online

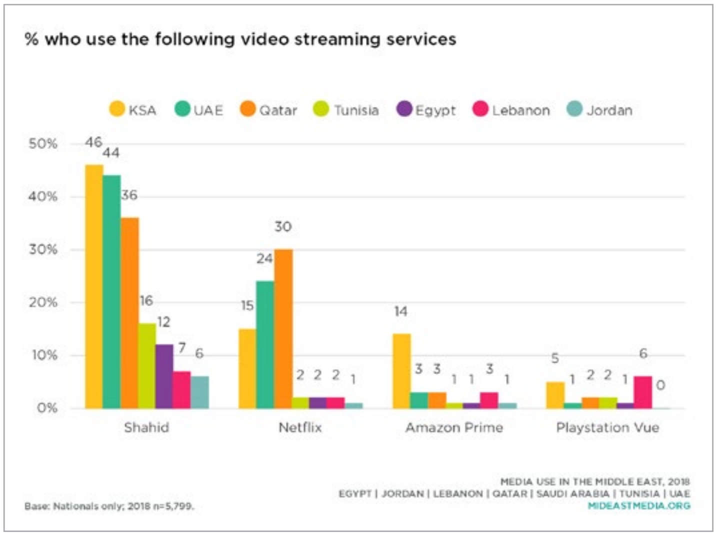
Media platforms for entertainment





The proportions of Arab nationals who regularly access entertainment are increasing across a range of digital and non-digital platforms but not for TV. While the share of nationals who watch TV is greater than that for any other medium and is close to saturation in most countries, daily use of TV fell significantly since 2016 (64% of nationals surveyed in 2016 vs. 54% in 2018), while daily use of certain other platforms rose in the same time period (watch any online video content: 30% in 2016 vs. 40% in 2018; listen to music online: 22% vs. 28%; watch films online: 9% vs. 15%).

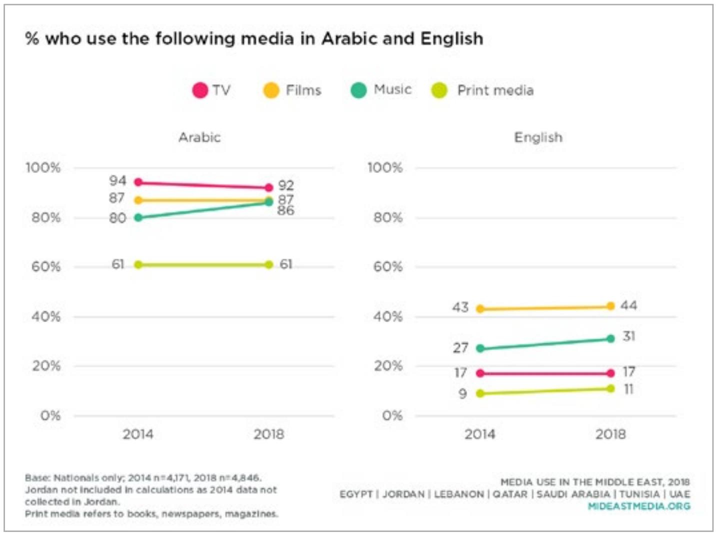
Moreover, the percent of nationals who watch specific types of TV on a TV set—series, films, news, and music—each dropped by about 10 percentage points since 2016. At the same time, the percentages of nationals who access these same media genres either online or on a phone specifically, grew by about five to 10 percentage points.



Nationals in Arab Gulf countries are much more likely to use streaming services than nationals in middle-income countries in the survey. More nationals use Shahid than any other service, while Netflix is a distant second—except in Qatar—where both are used by about one-third of nationals.

Younger and more educated nationals are more likely to use any streaming services (use any streaming service—age: 36% 18-24 year-olds, 29% 25-34 year-olds, 19% 35-44 year-olds, 9% 45+ year-olds; education: 32% university or higher, 29% secondary vs. 7% intermediate, 3% primary or less).

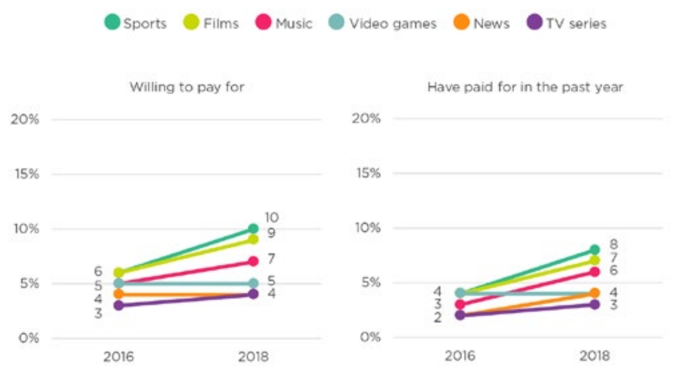
Language preferences



While media platform preferences are changing, the languages Arab nationals use to access media have not changed much. Between eight and nine in 10 nationals access Arabic-language TV, music, and film content—roughly the same proportion as in 2014. Around four in 10 nationals watch films in English, a third listen to music in English, and nearly one in five watch English-language TV, fractions all roughly the same as in 2014.

Paying for and sharing online content

% who are willing to pay and *have paid* for the following content online



Base: Nationals only, 2016 n=4,529, 2018 n=4,846. Jordan not included in calculations as 2016 data not collected in Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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A small but growing portion of nationals is either willing to pay or has paid for online content in the past year, but figures depend on the type of content. Close to 10% of nationals in 2018 said they are willing to pay or have paid for sports, films, and to a lesser degree music content online; willingness to pay for video games, news, and TV series have remained low since 2016.

Most nationals have shared or commented online about some topic in the past month, and this figure has increased sharply since 2014 (any content: 28% in 2014 vs. 54% in 2016 vs. 62% in 2018). Nationals are most likely to share or comment on online videos—one-third say they have done so in the past month—and about one in five or more have posted about music, news, and sports (34% online videos, 24% music, 19% news, 19% sports). Fewer nationals posted about films, ads, or TV programs in the past month (10% films, 9% ads, 6% TV programs).

Socializing with others in-person and online

Even as both smartphone and internet penetration have soared in Arab countries in the last several years, the average amount of time Arab nationals say they spend with family and friends in person each week has changed little since 2015 (29 hours family, 14 hours friends). Still, Arab nationals are communicating more with both friends and relatives online. The average amount of time spent each week online with friends and family each rose by five hours since 2015 (online friends: 8 hours 2015 vs. 13 hours 2018; online family: 5 hours vs. 10 hours).

Men and women spend equal time online with friends and family, about 12 hours per week online with friends and 9 to 10 hours online with family. Men, however, average five more hours per week in-person with friends, and women spend an average of seven more hours each week in-person with family (face-to-face,friends: 16 hours men vs. 11 hours women; family: 28 hours men vs. 35 hours women).

Perhaps not surprisingly, younger Arab nationals on average spend more time with friends, both in-person and online, than the oldest nationals (45+ year-olds), who spend more time in-person with family. The youngest nationals (18-24 year-olds) average five more hours face-to-face and eight more hours each week online with friends than those 45 or older (face-to-face: 17 hours 18-24 year-olds vs. 12 hours 45+ year-olds; online: 16 hours 18-24 year-olds vs. 8 hours 45+ year-olds). The oldest nationals, however, spend more time in-person with family each week than do nationals under 25, by five hours, but spend about the same amount of time online each week with family (in-person: 34 hours 45+ year-olds vs. 29 hours 18-24 year-olds; online: 8 hours 45+ year-olds vs. 9 hours 18-24 year-olds).

MEDIA SWINGS DIGITAL, BUT ARABIC LANGUAGE HOLDS FIRM

Commentary by Mohamed Zayani
Georgetown University in Qatar

Although TV remains a dominant mass medium and an important source of entertainment for Arabs, TV viewership continues to decline in the Middle East as other forms of media engagement are gaining ground. This decline means that more people are spending more time on the internet as it becomes more integrated into their daily lives. These changes are due not just to internet penetration and mobile adoption trends but also to the introduction of international streaming platforms, which constitute a growing threat to TV's ability to maintain its market share. Online streaming is booming as it offers more choice in programming to wired Arab consumers at competitive prices. Emerging partnerships between international media companies and regional Arab media entertainment companies have further enhanced the ability of streaming services to attract niche audiences and to tailor media products to Middle East market needs and expectations.

Notably, the data here also reveal that changes in media consumption habits have not affected the users' language preferences—Arabic remains the preferred language for national Arabs in their media consumption. However, it is useful to closely consider these socially favorable answers regarding language preferences. While the preference for Arabic may not have changed much, media and entertainment products increasingly defy the binary distinction between Arabic and English. For example, if we consider some music genres that are being widely consumed by Arab youth, content often consists of a blend of cultures, such that popular Western tunes are incorporated into Arabic songs. The popularity of these hybrid music genres suggests that while Arabic is consistently the preferred language when it comes to entertainment media, the Arabic language content that is being accessed is changing. The above-noted increase in accessing entertainment media on digital platforms rather than TV will likely lead to an increase in the consumption of hybrid-language content as well. In other words, media platform preferences may have more substantial cultural effects than the year-over-year consistency of Arabic language preferences suggested by the data.

By and large, digitization has had a larger effect on the platforms people use to access content than on the actual demand for Arabic content. This is evident in the greater demand for regional Arabic language streaming services than for global ones. For example, Shahid, which specifically targets Arab users with its rich repertoire of Arabic entertainment content, is far more widely used than international streaming services like Netflix.

That said, international content is increasingly finding its way to regional streaming services through agreements and partnerships with industry players who are eying a market share in the Middle East's growing subscription video market.

These findings need to be qualified by taking into consideration issues that go beyond content. For example, socioeconomic variables are important to note as demand for video streaming services in the Gulf region, with its superior ICT infrastructure capability and higher per capita income, is substantially higher than it is in other Arab countries covered by this survey. Equally noteworthy are widespread piracy issues as the number of users streaming videos illegally is rife and growing at an increasing rate. Significantly, while the apparent aversion to paid content this survey reveals accentuates the disruptive effect of piracy, it also tells us much about the disposition of telecommunication companies to adapt to shifting user needs and adjust to evolving consumer trends that are altered by digitality. Increasingly, telecom companies are offering bundles at competitive prices that cater to the growing demand for data and content consumption.

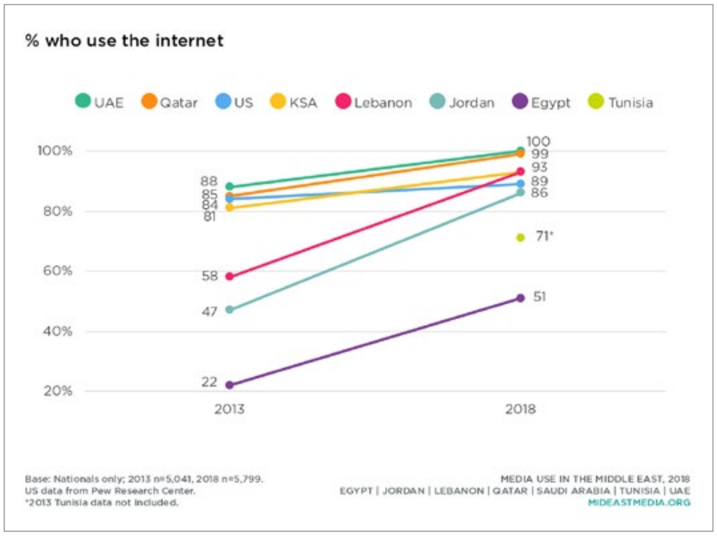
These survey data also suggest that ICT-induced changes are unfolding within a continuum of cultural practices. Better access to the internet and widespread use of smartphones have dramatically increased online activities and virtual communication in the Middle East and North Africa region, but they have not necessarily undermined traditional forms of communication or modes of sociality. Online interactions are not making real-world interactions obsolete, which is tantamount to saying that online socialization is no substitute for real-life socialization. The consistency of the survey findings tells us much about the ways in which people in the region have not only adapted fast-changing technological developments to social values and cultural practices, but also how users negotiate relationships in the digital era—though it is important to highlight that the real and the virtual worlds are not two separate spheres, as online and offline communications tend to overlap.

ONLINE & SOCIAL MEDIA

In this chapter

- Internet and smartphone use
- Language preferences
- Time spent with others online and in-person
- Social media platforms
- Online video
- Online streaming services

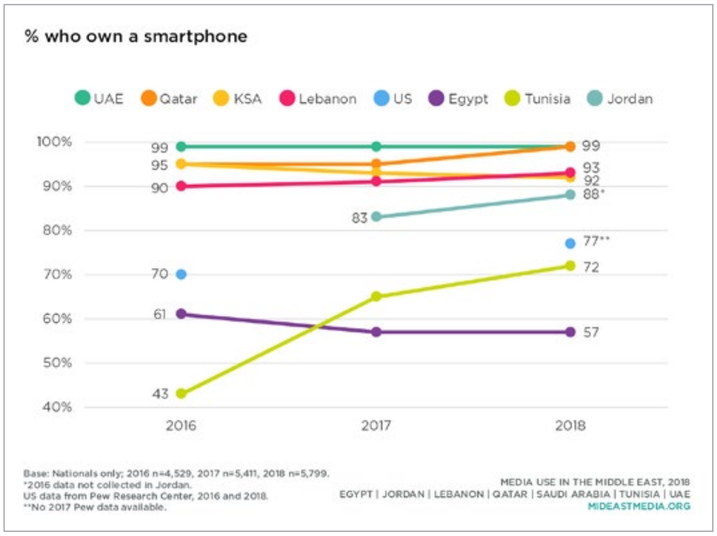
Internet and smartphone use



At least nine in 10 nationals use the internet in the surveyed countries, except Egypt and Tunisia. Internet penetration in Egypt rose from two in 10 to half of Egyptians between 2013 and 2018, and penetration in Tunisia rose from about four to seven in 10 from 2014 to 2018. More nationals in Arab Gulf countries surveyed in 2018 use the internet than in the U.S., where 89% of Americans use the internet (Pew, 2018).

Most Arab nationals 18-24 years old were online in 2014, with a moderate increase since then (83% in 2014 vs. 91% in 2018). By comparison, internet use among those 45 years and older more than doubled in the same time period, and now more than half of the oldest group are online (26% in 2014 vs. 56% in 2018).

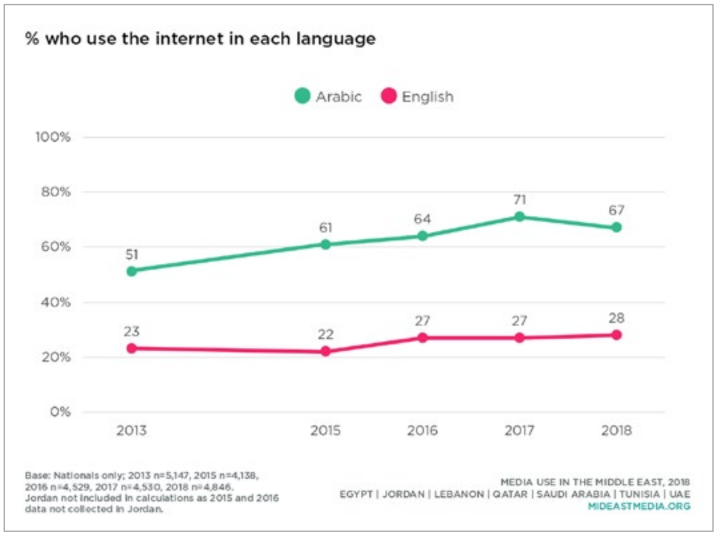
Internet use varies widely across education levels. While internet penetration among the least-educated Arab nationals increased significantly since 2014, still fewer than one-third of those with a primary education or less are online (primary or less: 14% in 2014 vs. 31% in 2018; intermediary: 40% vs. 67%, secondary: 71% vs. 86%, university or higher: 86% vs. 94%).

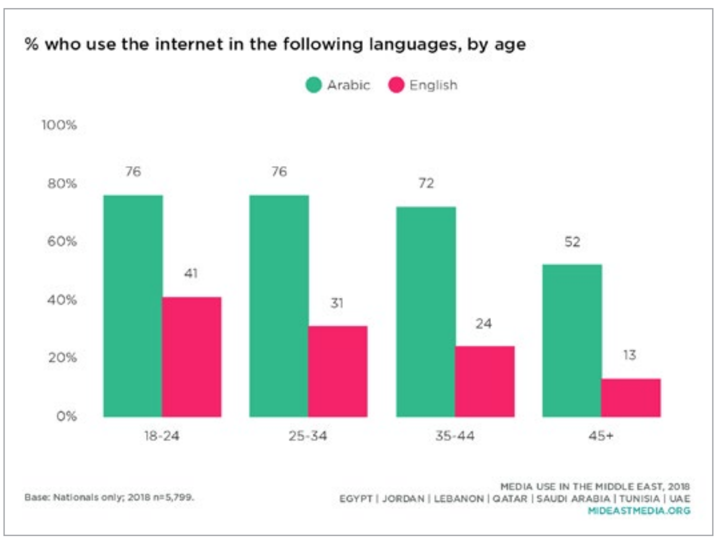


Nearly all Arab nationals own smartphones—at least nine in 10 across the countries surveyed—except Egyptians and Tunisians. Smartphone penetration in Tunisia increased by nearly 30 percentage points between 2016 and 2018, while remaining relatively unchanged in Egypt. Smartphone ownership in five of seven Arab countries studied here far exceeds the rate among U.S. residents (77% as of 2018, according to Pew).

The oldest (45+ year-olds) and least-educated (primary school or less) nationals are less likely to own smartphones, but the gaps between cohorts are shrinking. Compared to 2016, smartphone ownership rose 10 percentage points among those 45 years and older and nearly doubled among those with a primary education or less (age: 45+ year-olds: 49% in 2016 vs. 59% in 2018, 35-44 year-olds: 71% vs. 83%, 25-34 year-olds: 85% vs. 91%, 18-24 year-olds: 89% vs. 90%; education: primary or less: 19% in 2016 vs. 36% in 2018, intermediate: 65% vs. 72%, secondary: 79% vs. 87%, university or higher: 91% vs. 94%).

Language preferences



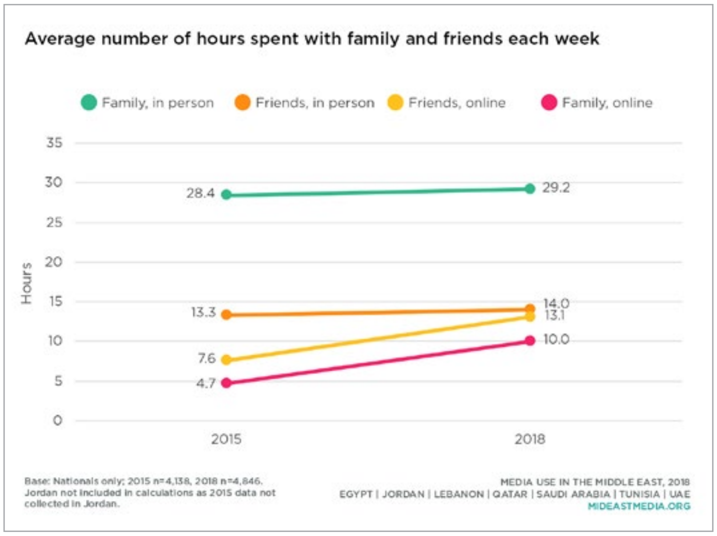


The languages Arab nationals use to access the internet have changed little since 2013 and reflect the sustained predominance of Arabic. More than two-thirds of nationals use Arabic online, while just one-third of nationals navigate the internet in English. English usage online varies widely. Majorities of nationals in Lebanon use the internet in English as do half in the UAE, but only about one in four or less in other countries access the internet in English (60% Lebanon, 49% UAE, 28% Qatar, 26% KSA, 22% Jordan, 15% Tunisia, 10% Egypt).

Additionally, while majorities of nationals in all age groups use the internet in Arabic, figures for English are lower among older respondents; four in 10 of the youngest and only 13% of the oldest nationals access the internet in English.

Not surprisingly, the percentage of nationals who access the internet in English rises sharply among more educated respondents (2% primary or less, 13% intermediate, 30% secondary, 43% university or higher).

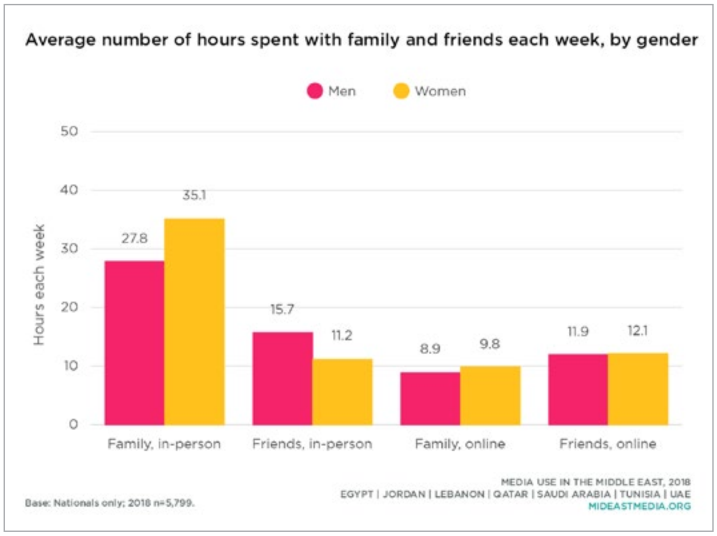
Time spent with others online and in-person



In-person time with family has not diminished in Arab countries over the last several years, despite increasing digital connectivity. Nationals consistently report spending double or more the amount of time each week in-person with family than with friends in person, with friends online, or with family online. Average time spent online with friends and family did, however, rise by a few hours since 2016.

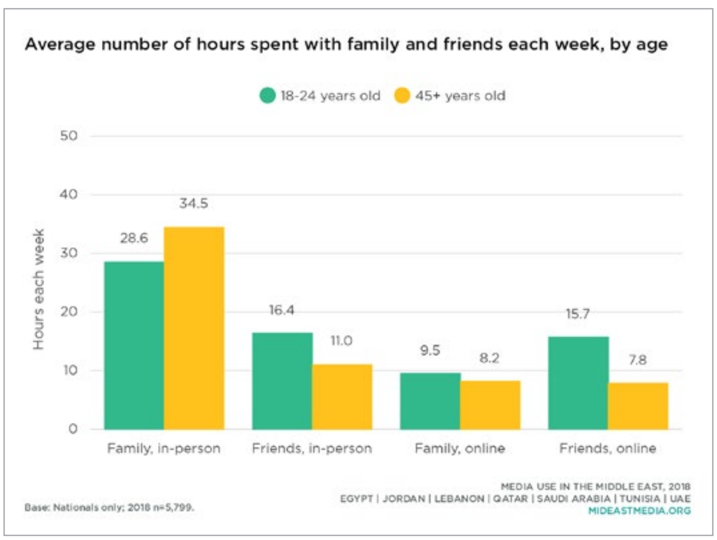
In-person time with family among Arab nationals was unchanged from 2015 to 2018 (28 hours per week in 2015 vs. 29 hours in 2018). In-person time with friends also remained unchanged (13 hours per week in 2015 vs. 14 hours in 2018). In-person time with family varies considerably by country, however; Emiratis spend nearly twice as many hours with family each week as Egyptians and Tunisians (47 UAE, 40 Jordan, 35 Lebanon, 29 Qatar, 27 KSA, 25 Egypt, 24 Tunisia). Tunisians, on the other hand, spend the most hours each week with friends (19 Tunisia, 15 KSA, 15 Qatar, 15 UAE, 14 Lebanon, 12 Jordan, 11 Egypt).

Arab nationals now spend almost as much time each week with friends socializing online as in-person given that online interactions with family and friends both increased by five hours per week from 2015 to 2018 (friends: 8 hours in 2015 vs. 13 hours in 2018; family: 5 hours in 2015 vs. 10 hours in 2018). Qataris spend the most time each week socializing online with others, both family and friends (friends: 22 Qatar, 19 Tunisia, 14 UAE, 12 KSA, 12 Lebanon, 9 Egypt, 8 Jordan; family: 15 Qatar, 13 Tunisia, 13 UAE, 13 KSA, 8 Lebanon, 7 Jordan, 4 Egypt), which may be due to the fact that Qataris spend more time using the internet for any purposes than nationals in all other countries surveyed.

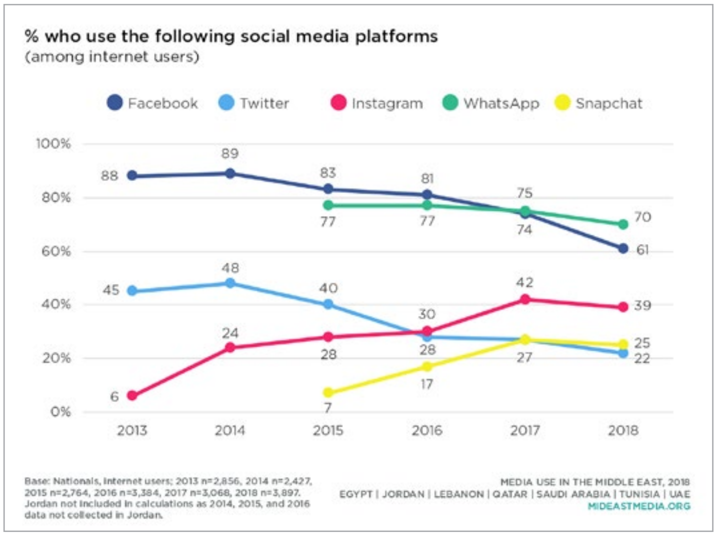


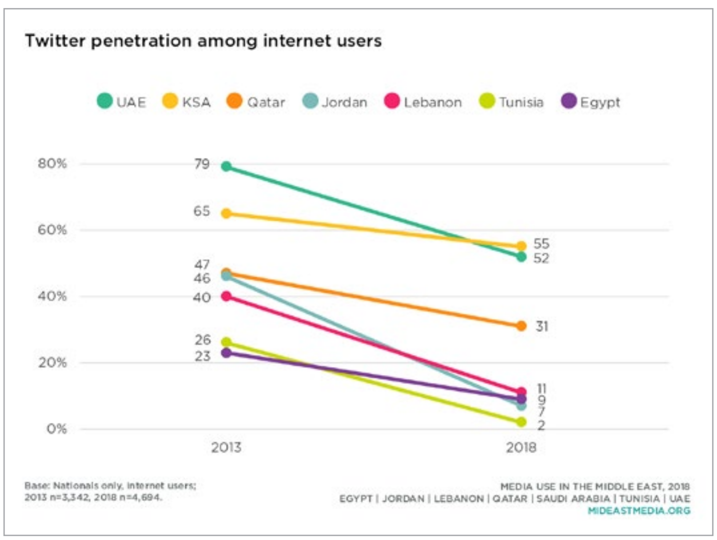
Men and women spend similar numbers of hours each week online with friends as they do with family. On average, however, women spend seven additional hours each week with family in-person than men do and five fewer hours face-to-face with friends than men.

While all age groups spend majorities of their in-person time with family, younger nationals average more overall time with friends both in-person and online than do older nationals. In contrast, nationals 45 years and older spend six more hours per week in-person with family than do those under 25 years old, on average.



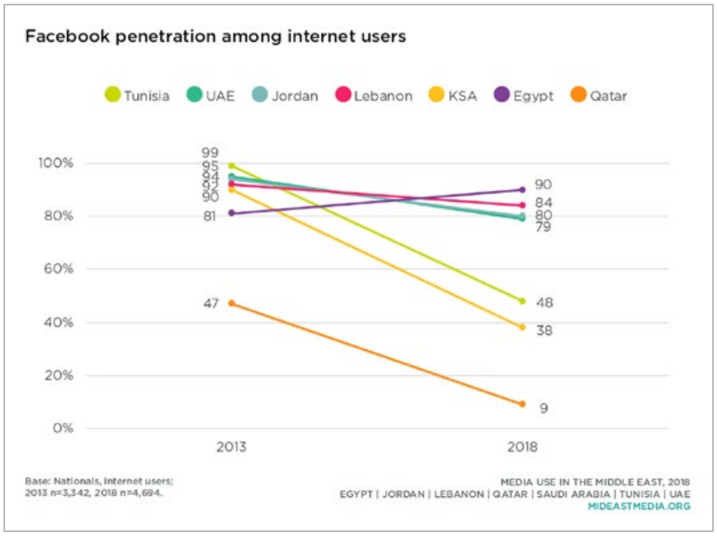
Social media platforms





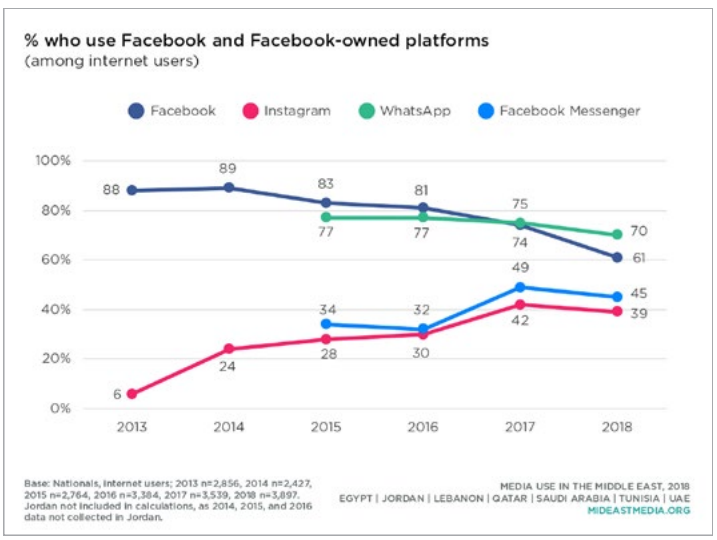
Since 2015, use rates of Facebook, Twitter, and WhatsApp have all fallen significantly among internet users. Facebook and Twitter, especially, have seen massive departures among Arab nationals. Both Snapchat and Instagram have risen in penetration since 2015, though both platforms have seemingly plateaued among Arab nationals who use the internet.

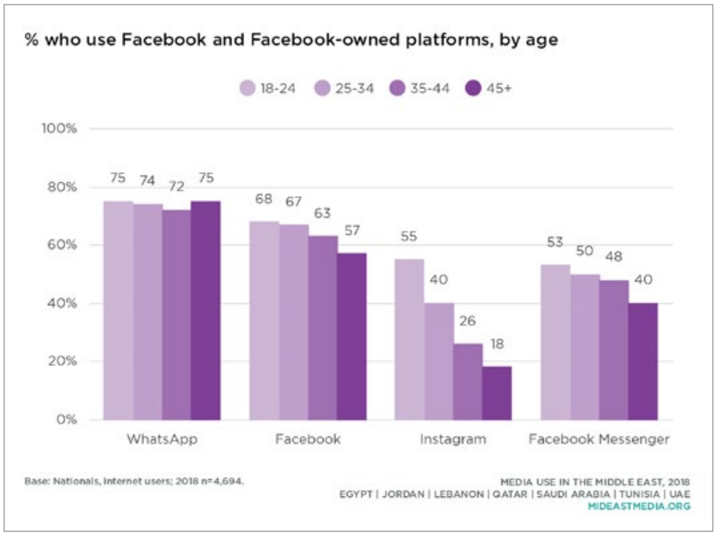
Qataris were always the least likely to use Facebook, but the share of Qataris who use the service nonetheless plummeted from about half in 2013 to 9% in 2018. The fall in Twitter penetration since 2013—use of the platform among internet users fell by half—reflects significant declines in every individual country surveyed.

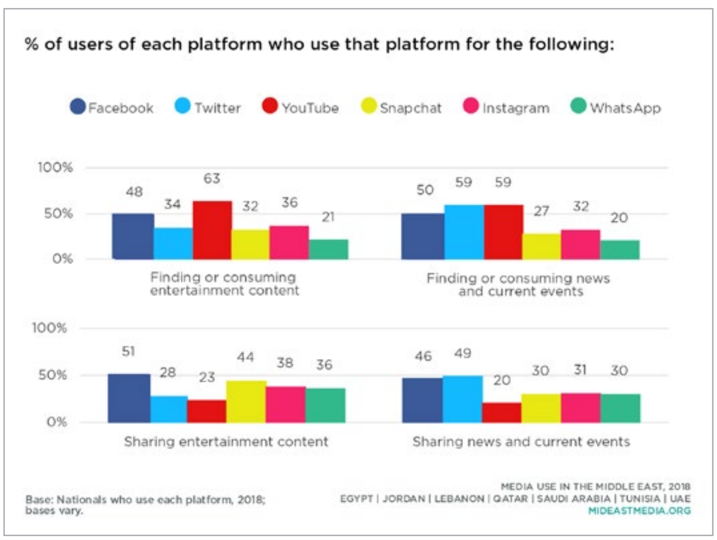


Facebook owns several major social networking sites other than Facebook proper, which employees at the company refer to as “the blue app.” Use rates for some other Facebook-owned platforms also fell among internet users in Arab countries.

WhatsApp penetration among Arab nationals who use the internet dropped by seven percentage points between 2015 and 2018. While Instagram and Facebook Messenger saw an approximate 10-point increase in the same period, use rates for both platforms are either unchanged or fell between 2017 and 2018.



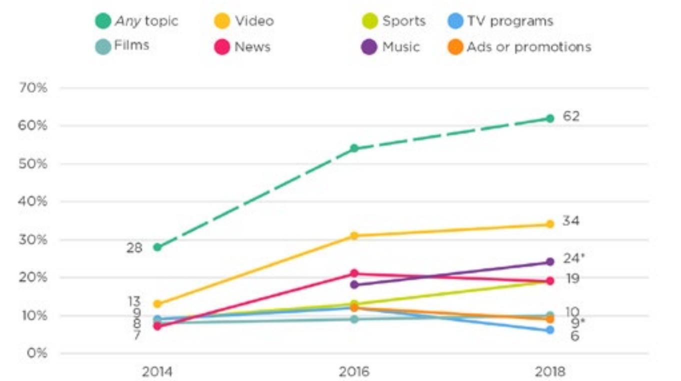




Older nationals who use the internet are no less likely than younger respondents to use WhatsApp, though Instagram and Snapchat are far more popular among the younger cohorts.

Among people who do use their platforms, Facebook and Instagram are utilized for a diverse set of reasons. Nearly half of Facebook users and 30 to 40% of Instagram users, for example, search for and share both entertainment and news/current events on the platform. Snapchat, not owned by Facebook, also serves multiple purposes among at least one-third of its users, but nearly half who use Snapchat share entertainment content on that platform, which is 14 percentage points higher than the proportion that shares news/current events on Snapchat. YouTube users, however, tend to use that platform for finding or consuming content (both news/current events and entertainment) rather than sharing content. Twice as many Twitter users get or share news on the platform as use it for entertainment.

% who sent, shared, or posted comments online in the past month about:



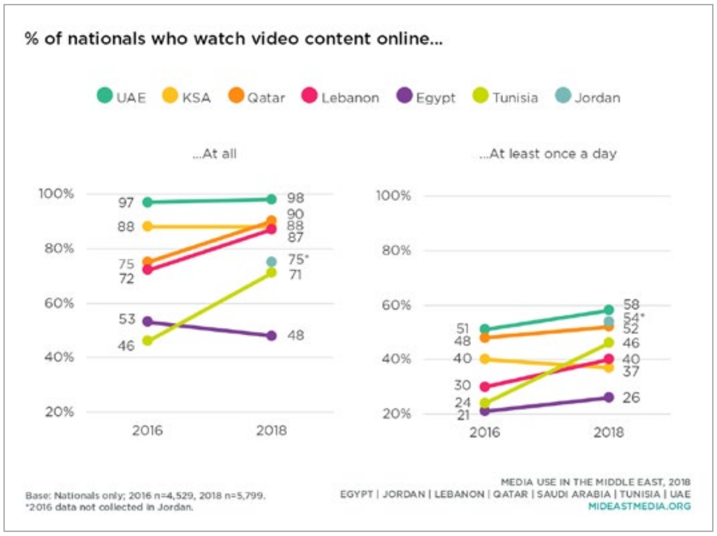
Base: Nationals only; 2014 n=4,171, 2016 n=4,529, 2018 n=4,846.
* Music and ads/promotions not included in 2014.
Jordan not included in calculations as 2014 and 2016 data not collected in Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

Between 2014 and 2018, the portion of Arab nationals who shared or commented on content online in the previous month more than doubled to six in 10. Online video remains the most shared/discussed content—by one-third of nationals—up from 13% in 2014. More nationals in 2018 than 2016 also said they shared about sports and music content in the prior month.

Majorities of men and women share content online, but men do so at a modestly higher rate than women (shared/commented in the past month: 67% men vs. 56% women). Perhaps not surprising, younger and more educated nationals are more likely to share or comment online, but, notably, even four in 10 of those 45 years and older and a quarter with a primary education have shared online in the past month (age: 73% 18-24 year-olds, 71% 25-34 year-olds, 60% 35-44 year-olds, 39% 45+ year-olds; education: 77% university or higher, 65% secondary, 51% intermediate, 23% primary or less).

Online video



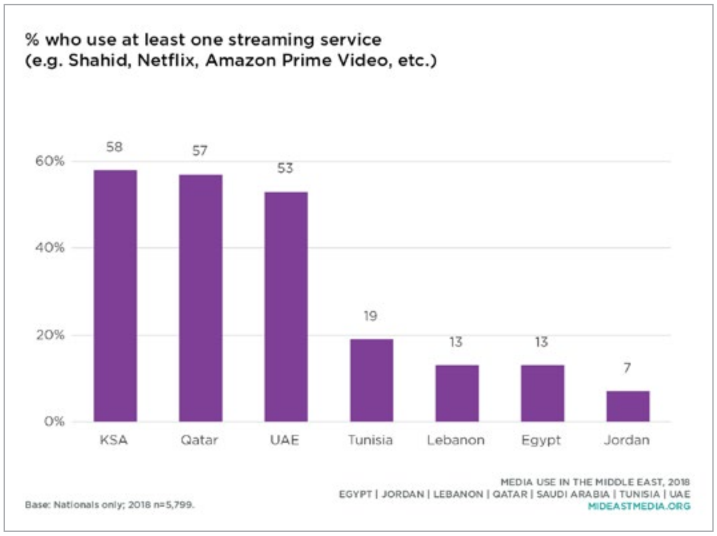
Large majorities of nationals watch online video content, and many do so every day. While almost all Emiratis and Saudis watch online video, which has been the case since 2016, the shares of nationals in Qatar, Lebanon, and Tunisia who do same have increased. About half or more of Emiratis, Jordanians, Qataris, and Tunisians watch online video content every day.

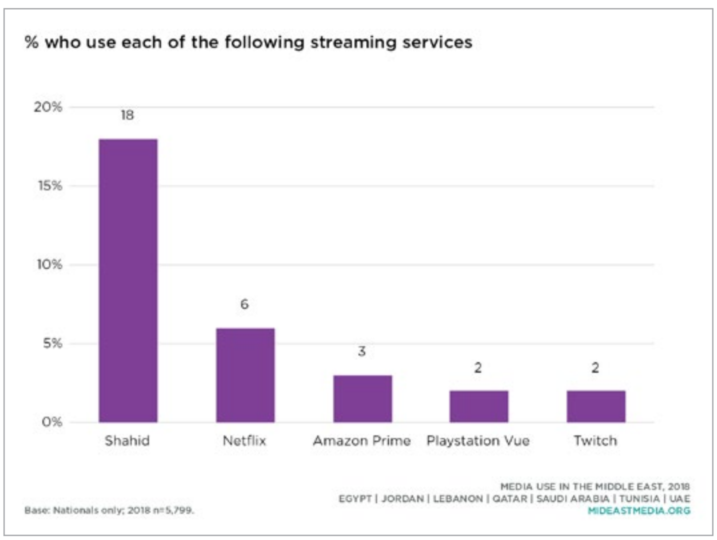
Nearly all 18-24 year-olds watch some online video, and more than half do so at least once a day (at all: 89% 18-24 year-olds, 85% 25-34 year-olds, 75% 35-44 year-olds, 49% 45+ year-olds; at least once a day: 55% 18-24 year-olds, 48% 25-34 year-olds, 41% 35-44 year-olds, 23% 45+ year-olds).

About half of nationals watched music video online in the past six months, nearly 40 percent watched films online and one-quarter watched TV content online in the same time period, representing an increase since 2016 for music and TV content (music: 41% in 2016 vs. 48% in 2018, TV: 21% in 2016 vs. 29% in 2018).

Nationals of all age groups are most likely to access music online followed by films and then TV content. Use rates for all three—music, films, and TV programs—vary by age and are higher for younger age groups (music: 62% 18-24 year-olds, 55% 25-34 year-olds, 43% 35-44 year-olds, 22% 45+ year-olds; films: 52%, 44%, 31%. 16%, respectively; TV programs: 33%, 32%, 23%, 11%, respectively). Of note: older nationals are more likely to access news online than entertainment content, though more than half of nationals in younger cohorts also access news online (52% 18-24 year-olds, 53% 25-34 year-olds, 47% 35-44 year-olds, 29% 45+ year-olds).

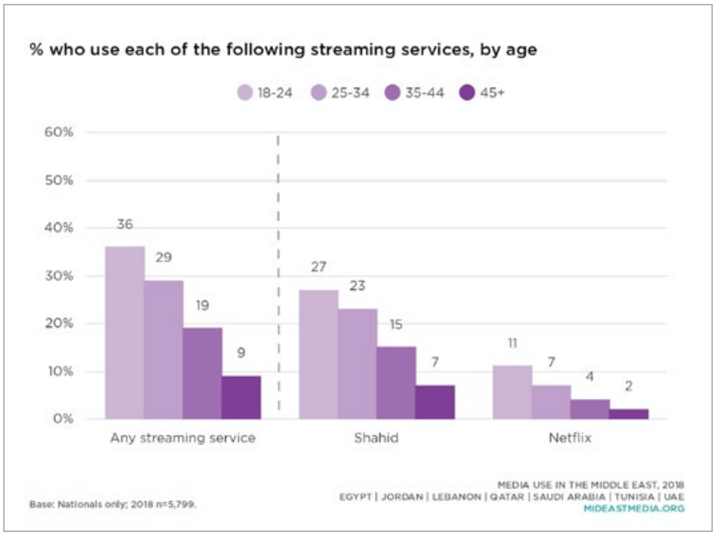
Online streaming services





Use of online streaming services varies across the region, with Shahid holding the greatest market share in all countries. Netflix is currently runner-up and is used by a larger share of Qataris than other nationals.

Nationals from Gulf countries are far more likely than other nationals to use any streaming service. It is worth mentioning that some streaming services are not available in Arab countries without a VPN, while others have been made available only in recent years. Amazon Prime Video requires a VPN, while Netflix only became available in some Arab countries in 2016. Amazon Prime Video content is also inaccessible to some non-holders of U.S. or U.K. credit cards.



Streaming services are used most widely among younger nationals. Those under 25 years old use streaming services at about four times the rate of those 45 years and older.

SOCIAL MEDIA GAINING POPULARITY IN A POST-BLOCKADE MIDDLE EAST

Commentary by Leah Harding
Al Jazeera English

Arabs are some of the most social people on the planet. Weddings and funerals last for days and social gatherings are the lifeblood in keeping culture alive. Family is first and decisions are made as if in a tribe; you consult one another and accept the majority rule. The same is especially true in the Gulf States, with tribalism only decades removed from modern society. Family is still king and the importance of each individual and how they interact has not changed. However, what has morphed over the years is the means with which these members communicate. Enter: social media.

In June 2017, Bahrain, Egypt, Saudi Arabia, and the United Arab Emirates led a blockade against Qatar. As a result, families were split, students were forced to withdraw from school, and travel times between the countries increased as airfare prices skyrocketed. With this divide, the need to communicate online increased. It is not surprising then to see an increase (even slightly) in social media use in Qatar and the UAE, perhaps as family members from both countries try to stay in touch despite their governments' disagreements.

At the beginning of the blockade, I was tasked with interviewing dozens of Qataris to ask them how life would change if the blockade continued. I used Instagram and Twitter to find individuals to speak to, though most of them felt most comfortable texting directly via WhatsApp. I did not use Facebook to reach interview subjects, as the platform's popularity in Qatar is rather low, but instead, Snapchat and Instagram are my go-to apps.

And across the region, women are more likely to decline interviews via social media, which is understandable as they are not as active on social media as their male counterparts. When women are active on social media, they gravitate toward apps like Snapchat and Instagram (specifically the Story feature) because of the time limits to posts and the increased privacy features that allow them to maintain a level of secrecy in their online accounts. Snapchat specifically appeals to women who do not want to show their faces; because of the filters they can choose to cover their faces or otherwise enhance different features on their face to hide their actual appearance.

WhatsApp is the most popular social media app among the countries surveyed. For one, it's encrypted, ensuring your government is not listening in on your conversation. Even after encrypted calls were blocked in Qatar after the blockade, the usage of these tools still went up as did the use of Virtual Private Networks (VPNs). Interestingly, Qatar and the UAE both saw an increase in WhatsApp use, likely because of the platform's speed, increased privacy options, and not needing to update a profile.

When it comes to sports, the blockade and 2018 FIFA World Cup seemed to play a role in media consumption in Qatar and Saudi Arabia. Qatar-based beIN Sports channel was the sole rightsholder for the FIFA World Cup in the region (including Egypt, Jordan, Lebanon, Tunisia, and the UAE), but in 2017, Saudi Arabia blocked access to it from within the Kingdom. Following this move, a spin-off network called 'beoutQ' started airing matches within Saudi Arabia. beIN called on Saudi Arabia to stop airing the pirate network, but Saudi Arabia maintains its innocence. Regardless, the demand for football clearly superseded politics and piracy in 2018, illustrated by the growing demand for paid sport subscriptions.

Economically it makes sense that Egypt and Saudi Arabia are the only two countries in this study that show a decline in internet and smartphone usage. Both countries have struggling economies and are experiencing tightening freedom of expression. According to the Freedom of Thought and Expression Law Firm, at least 496 websites were blocked between May 2017 and February 2018 in Egypt. Yehia Ghanem, an exiled Egyptian journalist, told Al Jazeera that Egypt's government now owns 95 percent of its TV channels.

The language Arabs choose to use online is also fascinating. The rise in Arabic and the decline in English is perhaps the opposite of what these countries want to see, especially for Qatar who invests an incredible amount into Western world-class education for its citizens. The UAE's rise in English on the internet perhaps makes it more marketable on a global stage. That being said, there is also a growing amount of Arabic content online that wasn't there before, as the Arabic language saturates more of the internet.

A sad growing trend is the amount of time Qataris, Saudis, and Tunisians are spending online instead of with their families. It is common across the Middle East to have group gatherings in parking lots, front porches, and at the majlis, and such daily social events are really the core of Arab culture in many ways. This is the time when families and friends bond and the ties between the units are strengthened. Arabs (as a whole) tend to wake up late and stay up late with many friends and family around. What has become more common, however, is to see groups together, but on their phones. I will often drive by Land Cruisers with Qataris inside while everyone (including the driver) is on their electronic device.

Social media has clearly shaped one of the most ancient civilizations on the planet, but will technology ever be able to replace social interactions for a culture that thrives on community living?

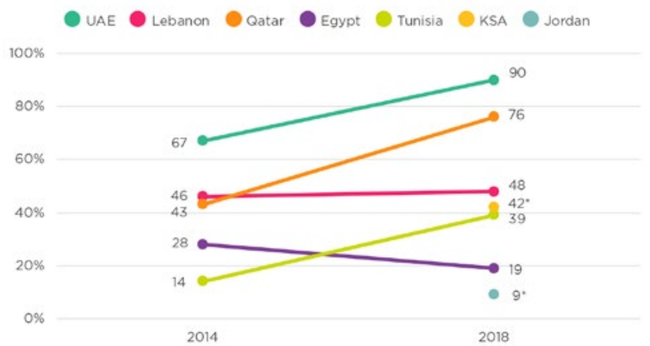
FILM

In this chapter

- Platforms for watching film; Cinema attendance
- Film languages, origins, genres
- Paying for and sharing about films online

Platforms for watching film; Cinema attendance

% who watch films in the cinema



Base: Nationals only; 2014 n=3,549, 2018 n=5,799.
*2014 data not collected in KSA or Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
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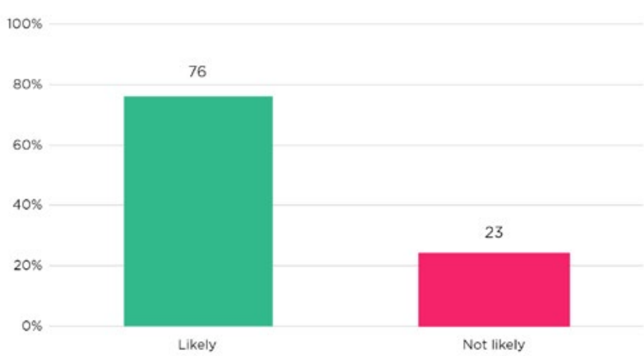
% of Saudis who say they're likely to go to the cinema when there's one nearby

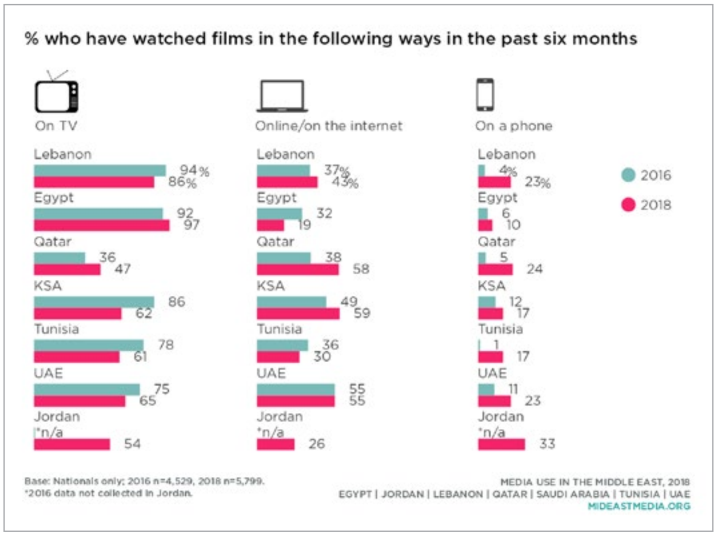


Base: Saudi nationals; 2018 n=629.
Percentages do not add to 100% due to Don't know/Refused responses.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

Films are an important source of entertainment in the Middle East, and Arab nationals are increasingly watching films via multiple channels, including on TV, online, and in the cinema. As in 2014 and 2016, nearly all nationals still watch films on TV (91% in 2014, 90% in 2016, 90% in 2018). Since 2014, though, film viewing on the internet increased by 21 percentage points and cinema attendance increased by 9 points (film viewing: 42% in 2014 vs. 50% in 2016 vs. 63% in 2018; cinema attendance: 33% in 2014 vs. 36% in 2016 vs. 42% in 2018).

An increase in online viewing and cinema attendance was observed in all surveyed countries, except in Egypt where film viewership online remained stable since 2014 and cinema attendance decreased. Cinema attendance is particularly high in the UAE and Qatar, as more than half of Emiratis and Qataris go to the cinema at least once a month (59% and 55%, respectively). Now that cinemas have reopened in Saudi Arabia, four in 10 Saudis say they go to the cinema and three-quarters are likely to do so in future. Nationals in Jordan and Egypt report the lowest cinema attendance.

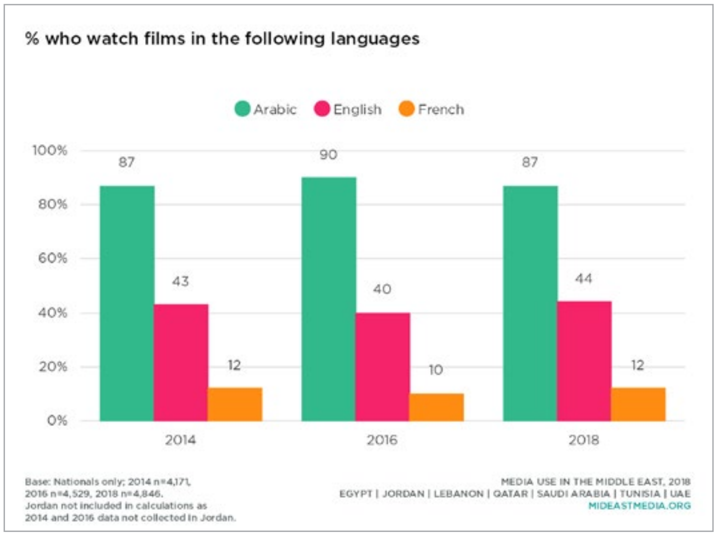


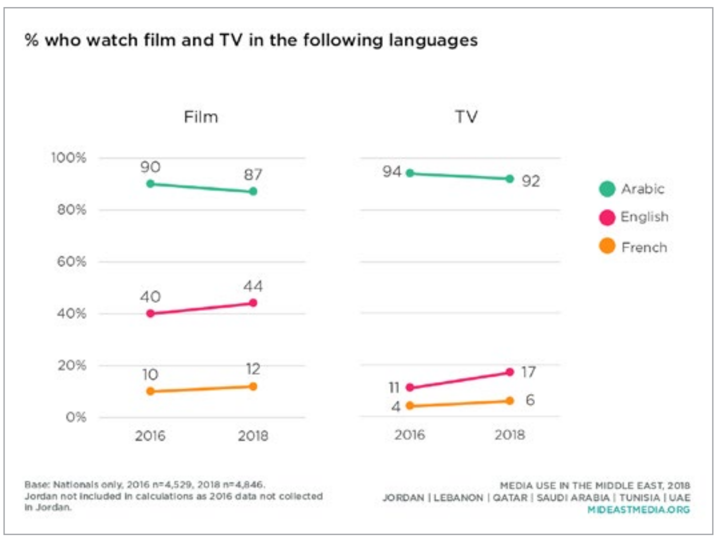
Men and women are equally likely to attend the cinema (38% men, 34% women), and nationals of all ages attend the cinema in similar proportions, apart from those 45 years and older who are less inclined to attend (45% 18-24 year-olds, 42% 25-34 year-olds, 36% 35-44 year-olds vs. 21% 45+ year-olds). Education seems strongly and positively associated with moviegoing (13% primary or less, 23% intermediate, 38% secondary, 52% university or higher).

The platforms used to watch films have changed since 2016. In most countries, nationals were less likely in 2018 than in 2016 to say they watched films on a TV in the past six months and more likely to have watched on a phone. Television, though, is still the dominant medium for watching films in all countries except Qatar; more Qataris watch films online than on TV. Only about one in five Arab nationals watched films on their phones in the past six months, but this represents a double-digit increase since 2016.

While nationals of all ages watched films on a TV screen in the past six months, younger nationals are three times as likely as those 45 years and older to watch films online or on a phone (online: 52% 18-24 year-olds, 44% 25-34 year-olds, 31% 35-44 year-olds; 16% 45+ year-olds; phone: 31%, 23%, 17%, 10%, respectively).

Film languages, origins, genres

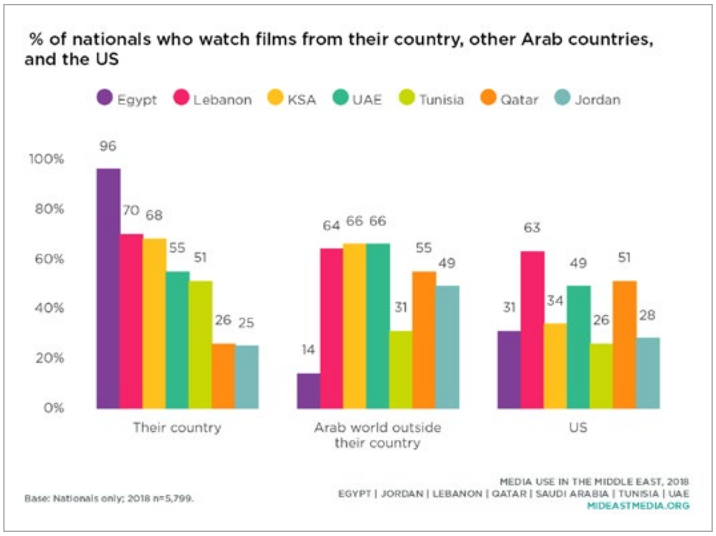


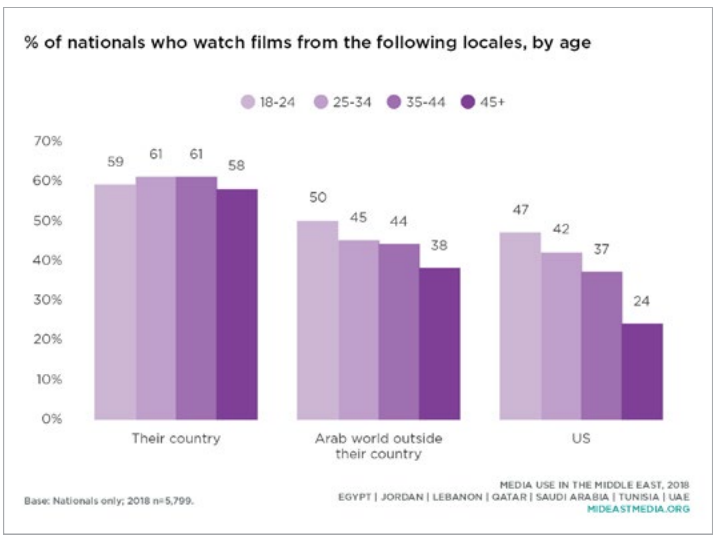


The languages in which Arab nationals watch films have changed little. Arabic remains the dominant language for films, with more than eight in 10 nationals watching films in that language. About four in 10 nationals also watch in English. Most nationals in Lebanon, UAE, and Qatar watch films in English (67%, 67% and 57%, respectively), while about one-third of Saudis, Jordanians, Egyptians, and Tunisians do so (39%, 33%, 32% and 29%, respectively).

Nearly all nationals watch both films and TV in Arabic, but they are twice as likely to watch films as TV in English. In fact, nationals are far more likely to watch films in English than to watch TV, listen to music or podcasts, or use the internet in English.

Interest in English-language films varies by key demographics. Men are much more likely than women to watch films in English (48% vs. 36%, respectively). The youngest age cohort is more than twice as likely to watch films in English as the oldest cohort (58% 18-24 year-olds, 47% 25-34 year-olds, 39% 35-44 year-olds, 23% 45+ year-olds). Furthermore, the most educated nationals are more than nine times as likely as the least educated to watch in English (58% university or higher, 46% secondary, 27% intermediate, 6% primary or less).

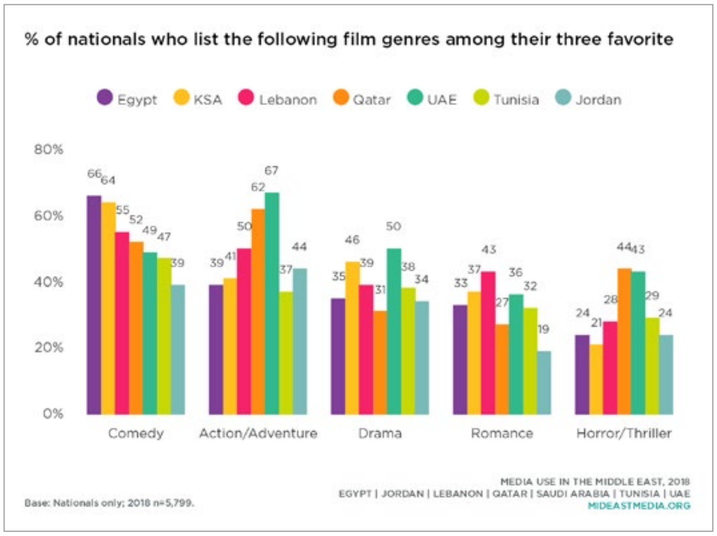




Most nationals in Lebanon, Saudi Arabia, Tunisia, and the UAE watch films produced in their own country, but only a quarter of Jordanians and Qataris watch films from their country. In fact, Jordanians and Qataris are twice as likely to watch films from other Arab countries than from their own country.

Interest in films from the U.S. varies widely across countries. Most nationals in Lebanon, Qatar, and UAE watch films from the U.S. while fewer in other countries do so. Lebanese nationals stand out for being equally likely to watch films from their country, other Arab countries, or from the U.S. Egyptians are far more likely to watch films from their country (nearly all do) than films from any other locale.

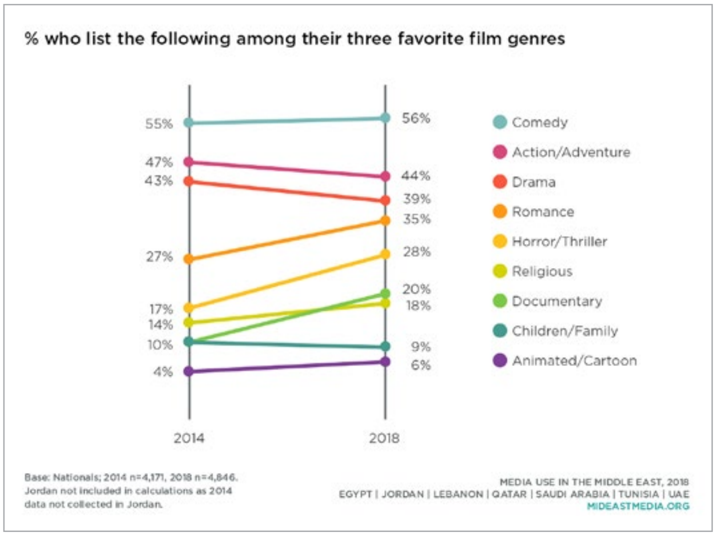
Films from the U.S. are more popular among younger nationals. Nationals 18 to 24 years old are twice as likely as those 45 years and older to watch films from the U.S.



Nationals who identify as culturally progressive are more likely than their conservative counterparts to watch films from the U.S. or Europe.

Men are more likely than women to watch films from the U.S., while more women than men watch films from their own country (U.S.: 45% men vs. 30% women; their own country: 62% women vs. 58% men). University-educated nationals are five times as likely as those with a primary education or less to watch U.S. films (54% university or more, 40%, secondary, 24% intermediate, 8% primary or less).

Comedy, action/adventure, and drama have been the genres most consistently cited by Arab nationals as among their top three favorites in each of the entertainment-observant iterations of this study (2014, 2016, 2018) (comedy: 55% in 2014, 58% in 2016, 56% in 2018; action/adventure: 47%, 48%, 44%, respectively; drama: 43%, 45%, 39%, respectively). However, interest has increased in other film genres including romance, horror/thriller, documentaries, and religious genres (romance: 27% in 2014 vs. 35% in 2018; horror/thriller: 17% vs. 28%; documentary: 10% vs. 20%; religious: 14% vs. 18%).

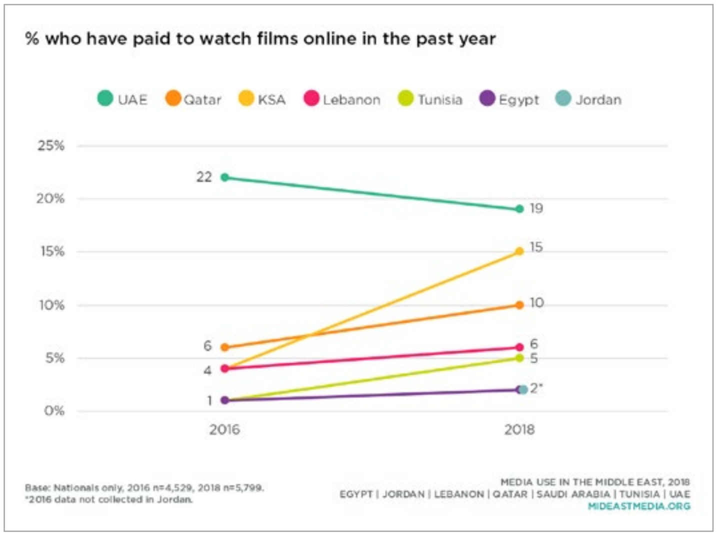


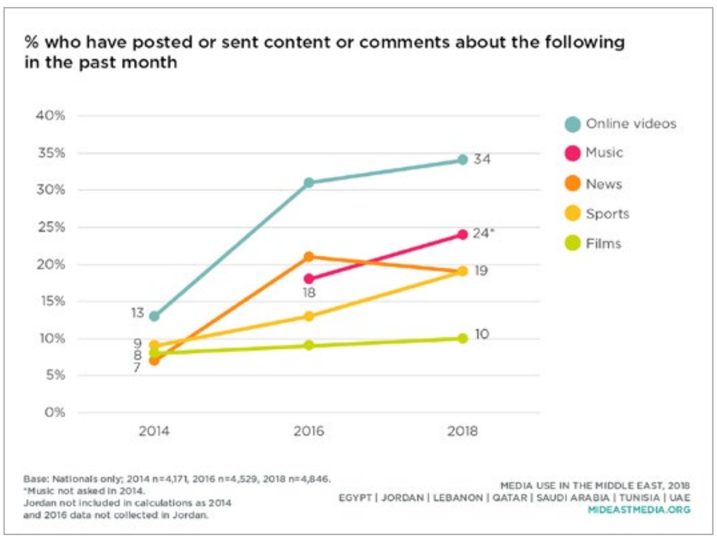
While film genre preferences are generally similar across countries, there are some notable variations. More Saudis than other nationals list comedy among their three favorite genres, and majorities of Qataris and Emiratis list action/adventure and horror/thriller as favorites. Lebanese nationals are the most likely to enjoy romance films, while Jordanians are the least likely to cite the romance genre as a favorite. Egyptians stand out as being twice as likely as nationals from other countries to name Arab classic as a favorite film genre, and the percentage increased significantly from 2016 to 2018.

Both genders frequently cite comedy among their preferred genres, though men are more likely than women to say action/adventure and horror/thriller are among their favorites; women are more partial than men to drama and romance films (action/adventure: 62% men vs. 27% women; horror/thriller: 38% men vs. 17% women; drama: 46% women vs. 31% men; romance: 44% women vs. 21% men).

Age also plays a role in some film preferences. The youngest nationals are more likely than those in older cohorts to name action/adventure, romance, and horror/thriller among their favorite film genres, while older nationals are more likely to prefer documentary, religious, and Arab classic films (action/adventure: 57% 18-34 vs. 27% 45+; romance: 40% 18-24 vs. 20% 45+; horror/thriller: 39% 18-24 vs. 13% 45+; documentary: 25% 45+ vs. 16% 18-24; religious: 31% 45+ vs. 10% 18-24; Arab classic: 33% 45+ vs. 14% 18-24).

Paying for and sharing about films online





While many nationals watch films online, paying to do so increased only moderately between 2016 and 2018. The largest increase was in Saudi Arabia, where the number who paid to access films online rose from 4% in 2016 to 15% in 2018. Qatar and Tunisia also experienced moderate increases (Qatar: 6% in 2016 vs. 10% in 2018; Tunisia: 1% vs. 5%, respectively).

While Arab nationals are generally not willing to pay for much online content, they are more likely to express willingness to pay for access to films and sports online than other content (9% sports, 8% film, 6% music, 4% video games, 3% TV shows, 3% news).

The youngest age group (18-24 year-olds) is nearly four times as likely to have paid to access films online in the previous year, compared to those 45 years and older but still only a small proportion of this group paid (11% 18-24 year-olds, 7% 24-35 year-olds, 6% 35-44 year-olds, 3% 45+year-olds).

The popularity of sending, sharing, or posting content or comments online increased over time. However, whereas films are among the least likely subjects of online posts, nationals are much more likely to share about online videos generally, and also specifically about music, news, or sports.

FOSTERING THE NEW GOLDEN AGE OF ARAB CINEMA

Commentary by Fatma Al Remaihi
Doha Film Institute

Film is a mirror in which we see ourselves and one that can change the world. The ability of film to provoke, influence, engage—and inevitably, change—perception makes it a powerful and influential medium. This insightful study by Northwestern University in Qatar on the region's media landscape accurately presents, from a unique perspective, the relevance of film in the context of individual markets. The findings in this report reiterate the important ways that film is engaging our communities—and the potential for its growth in the region as an art form.

While across the board there is strong interest in watching Arabic films, almost no viewers in the region watch locally or regionally produced films. This reaffirms the need to prioritize investment in the development of our film industry in order to increase the quality and presence of Arabic cinema. We need to establish a vibrant and sustainable ecosystem as well as a comprehensive resource hub that reflects our unique creativity and talent.

Since its inception, the Doha Film Institute has been committed to propelling Qatar's film industry through training, production, and networking initatives focused on cinema appreciation, education, and development. The Institute's efforts have seen significant successes with a consistent output of regionally and internationally acclaimed award-winning films, but there is more to be done. We all must continue to invest in emerging talent and support artistic and technical development in a meaningful way.

Another notable highlight in the study is the increasing shift in the consumption of films from traditional to digital platforms. Although television remains a strong anchor, more and more people are watching content online and on smartphones—even if only a fraction of those who watch content on mobile devices pay for the service. This highlights new challenges ahead for filmmakers as traditional models of film financing continue to evolve, creating the need to reevaluate and identify alternate and creative forms of sustainable sources of revenue in today's tech-driven era.

Online consumption of film has also democratized response to cinema—for better or for worse. In the age of citizen journalism, every Tweet, Facebook or Instagram post contributes to a massive social media voice where everyone is a critic, and films are rated, debated and commercial prospects predicted. This presents an opportunity to ensure fair representation of our narratives by promoting views and opinions from the Arab world in the online community. By fostering the sense of belonging and identity that comes from bolstering the visibility of original content from our own perspectives, we secure the growth of a relevant and current artistic community.

Taking a pragmatic view of the report, the findings predominantly point to a crucial need to align our local film industry to fill the wide gap in volume and overall quality, and great potential to fulfill a desire for Arabic content that is both meaningful and entertaining. Accurate representations of our people and the region are essential for bridging understanding and challenging stereotypes and misconceptions about Arabic culture that permeate popular art and media.

Film is a universal media that transcends typical limitations of other mass communication, bringing together people from discrete communities and disparate geographies into a common space of visual storytelling. As much as it highlights individual traits and challenges, on a fundamental level, it unites us all through common hopes, dreams, and core values. Using this unity to work towards positive change by acknowledging and respecting cultural differences and countering destabilizing prejudices, we will better address the societal ills that are pervasive in all of today's communities—regardless of geography.

Significant expansion in the local, regional, and global reach of cinema can be credited to the continued shift of media use platforms from the big screen all the way to smart screens. With this comes the requirement for more powerfully engaging content to retain audience interest—and an opportunity to put our best foot forward in showcasing our culture and creativity in an authentic way.

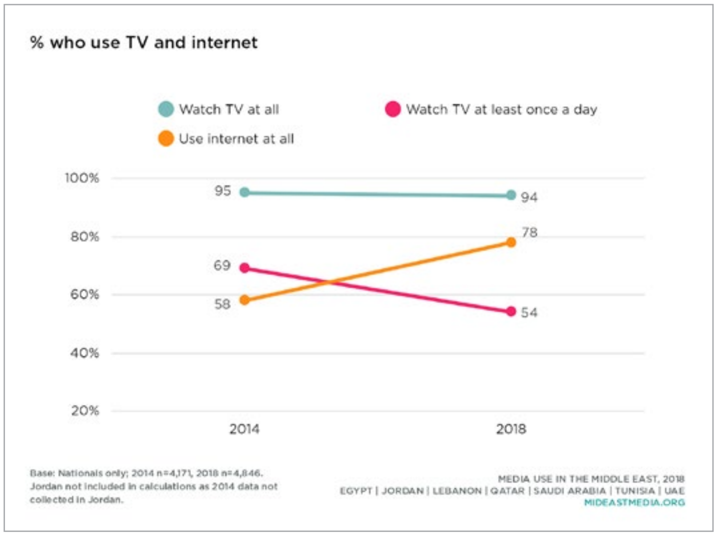
The Doha Film Institute focuses its year-round calendar of activities towards the vision of empowering the current generation of visual storytellers to have confidence in their voices and providing a solid foundation for the leaders of the next golden age of Arab cinema. The findings of this report illustrate the opportunity and necessity for a commitment to prioritize contribution to our film and creative communities. I encourage all of you who are inspired by this report to embark on your own journeys to step out; dare to dream, and make your dreams reality on the screen.

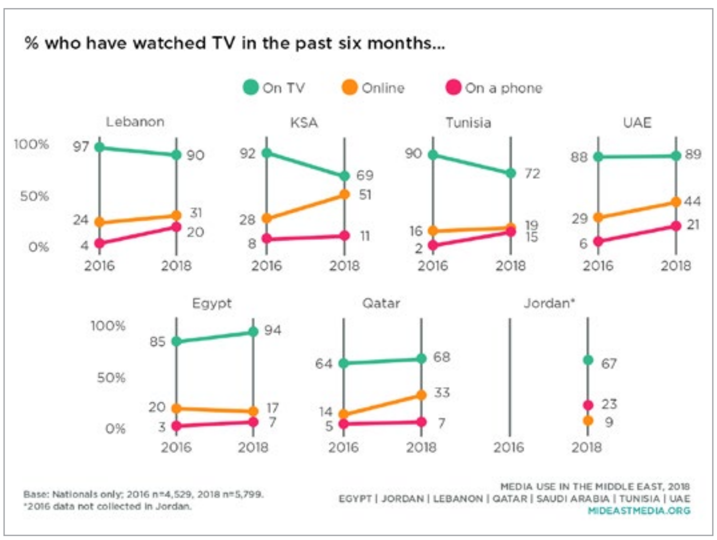
TV

In this chapter

- Basic TV habits
- Languages and geographic origins of TV content
- Genre preferences
- Posting about TV online

Basic TV habits

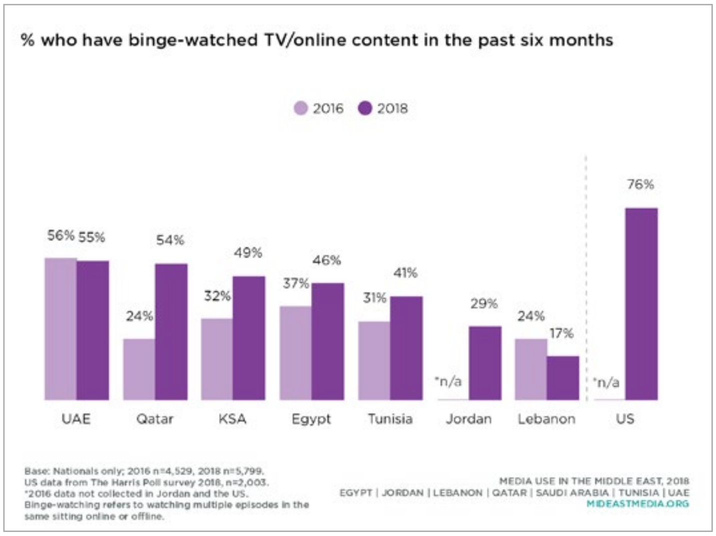




TV remains an important entertainment medium in the Middle East, but how Arab nationals watch TV and how often, is changing. Almost all nationals watch TV, but significantly fewer watch TV every day compared to 2014 (69% in 2014 vs. 54% in 2018). At the same time, nationals are now more likely to go online for entertainment on a daily basis—to watch videos, listen to music, get news, and watch films online (watch videos: 30% in 2016 vs. 40% in 2018; listen to music: 22% vs. 28%; check news: 29% vs. 34%; watch films: 9% vs. 15%).

Nearly nine in 10 nationals across all age groups watch at least some TV, but younger respondents are least likely to watch TV every day (44% 18-24 year-olds, 48% 25-34 year-olds, 54% 35-44 year-olds, 61% 45+ year-olds).

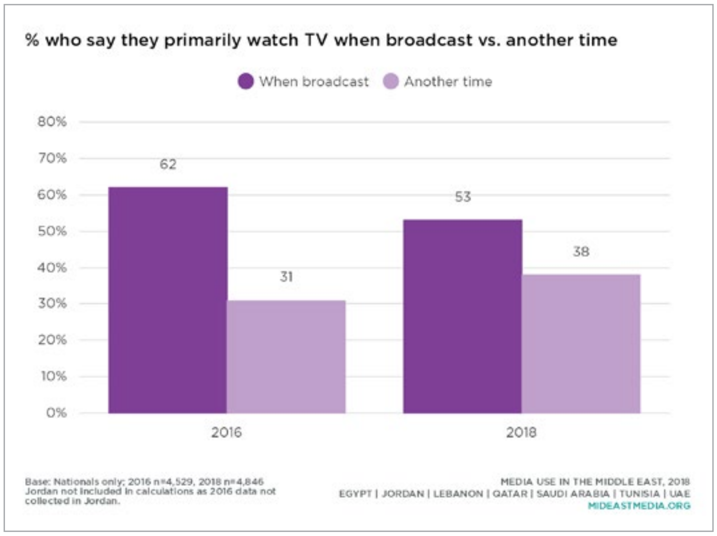
Actual TVs are the primary means nationals use to watch TV shows, but since 2016 the proportions watching both online or on a phone have increased. Online viewing of TV shows increased most dramatically in the Arab Gulf countries studied—by 15 percentage points or more in Qatar, Saudi Arabia, and the UAE.

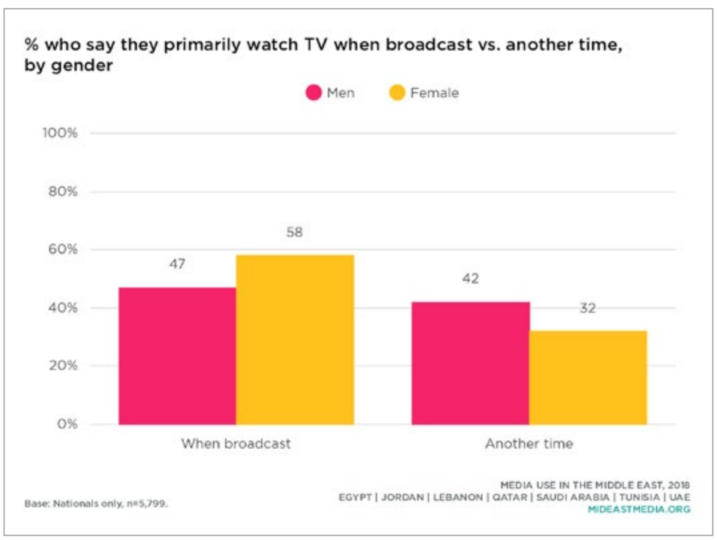


The youngest nationals watch TV online and on phones at rates double or more than the oldest age group (online: 33% 18-24 year-olds, 32% 25-34 year-olds, 23% 35-44 year-olds, 11% 45+ year-olds; on a phone: 20%, 17%, 12%, 10%, respectively).

Eight in 10 nationals watch TV on an actual television, a figure that does not change across levels of education. However, fewer than 10% of the least educated (primary school or less) watch TV online or on a phone compared to more than double that rate among those with a university education (online: 6% primary or less, 17% intermediate, 28% secondary, 34% university or higher; on a phone: 6%, 13%, 17%, 17%, respectively).

More nationals report binge-watching TV series, that is, watching multiple episodes of entertainment content online or on TV in the same sitting. Half or more of Qataris, Saudis, and Emiratis say they have binge-watched content in the past six months, which represents sharp increases in Qatar and Saudi Arabia since 2016. More than four in 10 Egyptians and Tunisians binge-watch TV but it is less common in Jordan and Lebanon. Binge-watching in all the Arab countries in this study is less common than in the United States, where three-quarters of internet users say they have binge-watched content in the past six months.

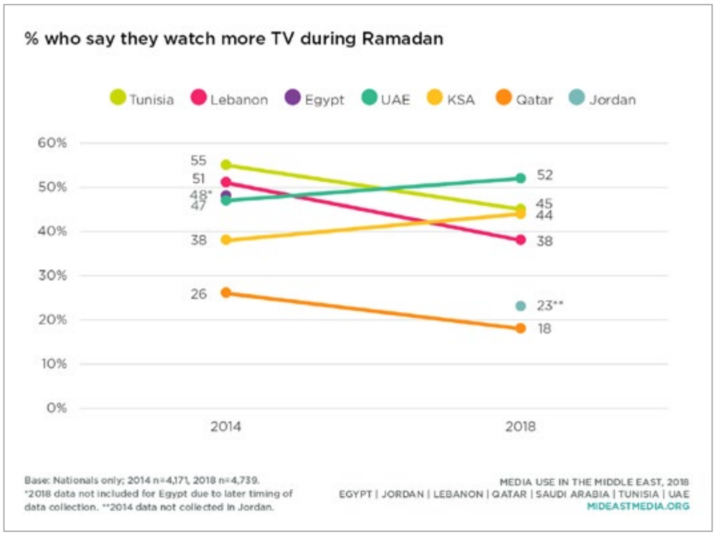




Women are more likely than men to have binge-watched a TV series in the past six months (46% vs. 30%, respectively). Binge-watching is also more prevalent among younger nationals (46% 18-24 year-olds, 41% 25-34 year-olds, 36% 35-44 year-olds, 27% 45+ year-olds).

As in 2016, Arab nationals tend to watch TV when the show is broadcast rather than at another time. Still, the gap between the share of respondents that says they mostly watch TV at broadcast time and the share that watches at their convenience has narrowed.

Women tend to watch TV shows when they are broadcast, while men are more likely to watch TV content at another time.

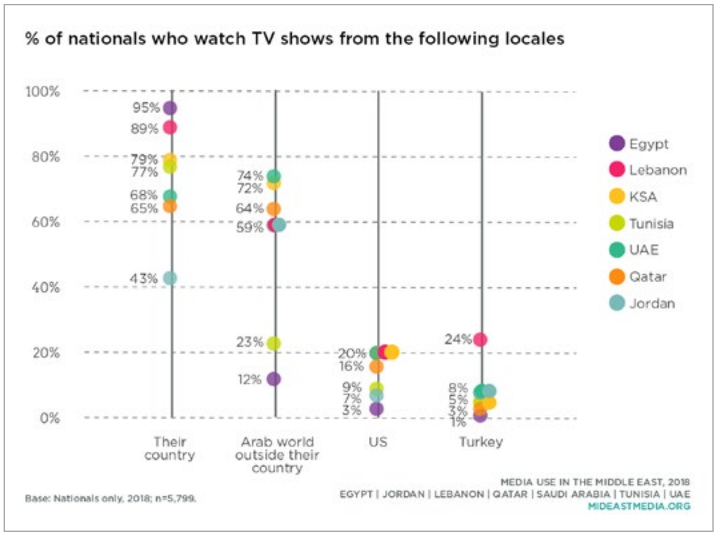


Older nationals tend to watch TV shows at the time of broadcast, but half of the youngest nationals also watch TV at the scheduled time (when broadcast: 48% 18-24 year-olds, 50% 25-34 year-olds, 55% 35-44 year-olds, 58% 45+ year-olds; another time: 42%, 40%, 36%, 29%, respectively).

Watching TV is the media activity Arab nationals are most likely to do more of during Ramadan. Nearly half of Arab nationals also say they spend more time consuming entertainment media with their families during Ramadan.

About half of Saudis, Tunisians, and Emiratis say they watch more TV during Ramadan, an increase in both Saudi Arabia and the UAE since 2014 but a decline among Tunisians. The proportion who watch more TV during Ramadan also dropped in Lebanon and Qatar.

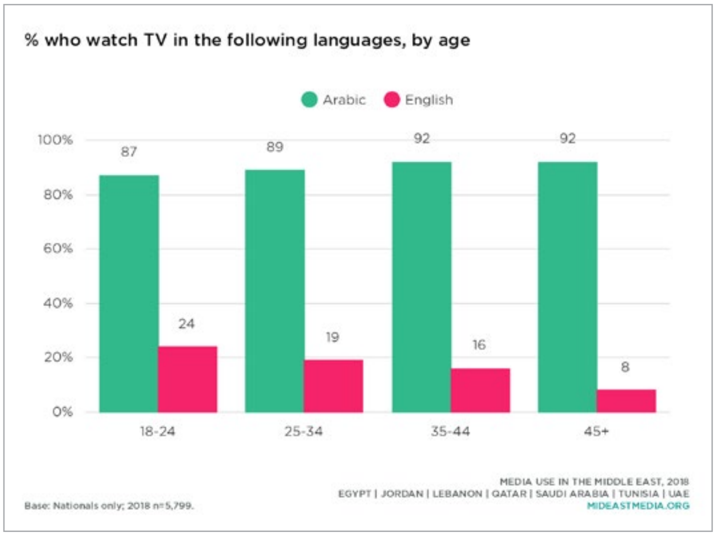
Languages and geographic origins of TV content

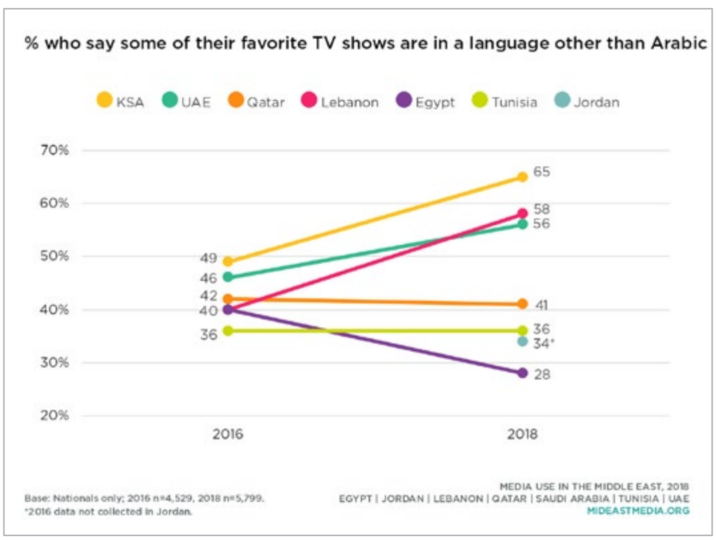


Significant majorities of nationals in each country prefer shows from their own country or from other Arab nations (except in Jordan, where only four in 10 watch such programming). Almost all Egyptians watch TV programs from their own country, but only one in 10 watch shows from other Arab countries. Emiratis and Saudis watch TV programs from other Arab nations at the highest rates. About one in five nationals in Lebanon, Qatar, Saudi Arabia, and the UAE watch TV programs from the U.S. One-quarter of Lebanese nationals watch Turkish TV content.

Education appears to be a more significant factor with regard to watching TV content from Western countries than from the Arab region. At least three-quarters or more of Arab nationals across all educational categories watch shows from their own country, and half of those with a secondary education or more watch programming from other Arab nations. Nationals with at least a university education, however, are significantly more likely to watch Western TV content than those with a primary education (U.S. shows: 19% university or higher, 13% secondary, 4% intermediate, 1% primary or less; European shows: 13%, 9%, 4%, 2%, respectively).

Nine in 10 Arab nationals watch TV content in Arabic, compared to nearly two in 10 who watch in English; figures differ considerably across countries for English content, from a high of 35% in the UAE to a low of 3% in Egypt. Tunisia and Lebanon are the only countries in which a modest number of nationals watch TV in French (16% and 7%, respectively).





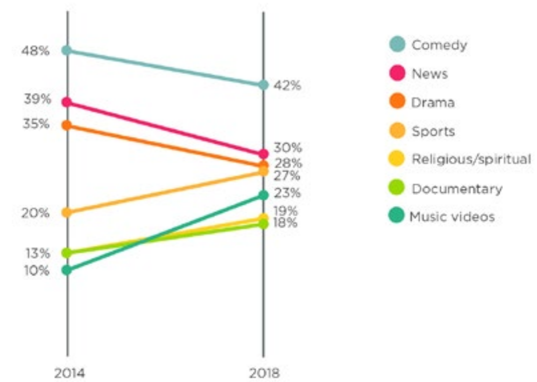
Nine in 10 nationals across all age groups watch TV in Arabic. However, nationals under the age of 45 years are two to three times more likely to watch TV programs in English than those 45 years and older.

Education is positively associated with watching TV in English. Nationals with at least a college degree are eight times more likely than the least-educated nationals to watch TV in English (3% primary or less, 7% intermediate, 19% secondary, 25% university or higher). Nationals who self-identify as culturally progressive are also more likely to watch TV in English than those who identify as culturally conservative (31% progressive vs. 14% conservative).

Nationals are far more likely to watch English-language films than English-language TV. Compared to 2016, though, more Arab nationals in 2018 agree with the following statement: some of my favorite TV shows are in a language other than Arabic (41% in 2016 vs. 45% in 2018). Majorities in Lebanon, Saudi Arabia, and the UAE say some of their favorite TV programming is not in Arabic, and at least one-third of nationals in the other countries agree. The proportion of nationals in Qatar and Tunisia whose favorite TV programs include non-Arabic content did not change between 2016 and 2018, but the figure rose among Lebanese, Saudis, and Emiratis. Egyptians are the only nationals less likely in 2018 than 2016 to say some of their favorite shows are in a language other than Arabic.

Genre preferences

% who list the following among their three favorite TV genres



Base: Nationals; 2014 n=4,171, 2018 n=4,846. Jordan not included in calculations as 2014 data not collected in Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

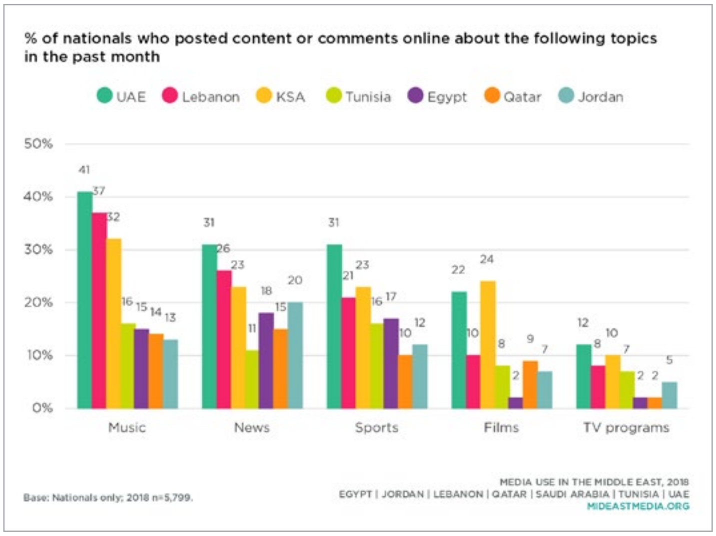
Nationals' three favorite TV genres have remained the same since 2014—comedy, drama, and news—but fewer list these genres as favorites than did so in 2014 given that more nationals turn to the internet for news and other genres have increased in popularity. The share of nationals listing music videos as a favorite TV genre increased by 13 percentage points between 2014 and 2018, those citing sports by 7 points, those choosing religious/spiritual genres by 6 points, and nationals citing documentaries as a favorite by 5 points.

Several changes in TV genre preferences are notable at the country level. The percentage of Lebanese who list news as a favorite genre fell by nearly half, from 51% in 2014 to 27% in 2018, while preferences for music videos, documentaries, and reality shows nearly doubled in the same period. Religious/spiritual content was listed as a favorite genre by 35% of Qataris in 2014, a figure that dropped to 23% by 2018. At the same time, the popularity of comedy, drama, and news all increased in Qatar.

In Saudi Arabia, interest in religious/spiritual content as a favorite genre increased exponentially from 5% in 2014 to 33% in 2018. Preferences for sports and music videos also doubled and tripled, respectively, in Saudi Arabia since 2014. The share of Tunisians citing music videos among their TV favorite genres nearly tripled between 2014 and 2018. In the UAE, sports as a favorite genre jumped from 17% of nationals in 2014 to 42% in 2018. Interest in music videos also increased significantly among Emiratis.

Genre preferences vary by gender. Women are more likely than men to list dramas, religious/spiritual programming, fashion content, and talent shows among their favorites (drama: 34% women vs. 23% men; religious/spiritual: 24% vs. 16%; fashion: 19% vs. 3%; talent shows: 19% vs. 15%). Men, on the other hand, are more likely than women to prefer news, sports, and documentaries (news: 40% men vs. 24% women; sports: 44% vs. 7%; documentaries: 23% vs. 15%).

Posting about TV online



While many Arab nationals watch TV shows online, very few paid for online TV content in the past year, ranging from the highest rates (still less than 10% overall) in the UAE to barely anyone in Lebanon or Qatar (8% UAE, 5% KSA, 4% Tunisia, 2% Jordan, 2% Egypt, 1% Lebanon, 1% Qatar).

Arab nationals are also not inclined to post about TV programs online. Only one in 10 or fewer across countries say they sent, shared, or posted content or comments online about TV shows in the past month, much less than the share of nationals who posted about music, news, sports, or films in the same time period. Fewer than 10% of any demographic group across gender, age, or education level have posted online about TV shows in the past month.

THE CHANGING TV LANDSCAPE

Commentary by Marwan M. Kraidy
Annenberg School for Communication
University of Pennsylvania

Television remains the queen of media in the Arab world, but this regal status is changing every year. Arab nationals no longer watch television every day, and when they do it is increasingly online or on their mobile device. These trends have been around for at least a half-decade, but many are now crossing thresholds that will affect the way that society and individuals relate to television.

How the new television practices will change social rituals is an issue to watch. Traditionally, television viewing in the Arab World is a family practice. This is particularly the case during the Holy Month of Ramadan when media companies air the very best in television drama, comedy, and game shows. Programming takes off as viewers break their fast with a lentil soup, continues as they sample a feast, and ends past dessert time.

How this pairing of religious ritual, festive eating, and television viewing will be challenged by online and particularly mobile viewing, goes to the heart of Arab concerns about media and changing social norms. Not having to wait for your favorite show to be broadcast has its appeal and so does the ability to watch it on your mobile device on your own while lying on your bed.

However, trends like binge-watching, which are at face value not healthy practices, risk reigniting Arab culture wars that have been dormant for years. For example, ten years ago, one of the standard lines of attack against Arab reality television in the Gulf and elsewhere, was that “it killed time” by compelling people to watch contestants’ daily lives for hours at a time. This was done first through dedicated satellite channels then online live streams. Nowadays, every middle-class Arab teenager carries a “permanent TV” interface in their pocket.

Television viewing used to punctuate the daily routine. It was a rather predictable part of one’s daily rhythm, and it typically occurred in the evening. Now there is a risk that television viewing is undergoing a disconnection from daily life; it is either completely delinked from people’s daily routines, or it totally dominates one’s day. The tempo of television watching is changing as much as the technology of access with consequences for family life, social tradition, and national cohesion.

One interesting finding in that regard is gender differences among Arab nationals watching television when broadcast versus another time. More men than women watch television at “another time,” presumably via on-demand digital platforms, whereas less than half of men compared to nearly two-thirds of women watch television “when broadcast.” This suggests that women, perhaps because they remain the primary homemakers and caregivers, have fewer opportunities than men to watch television at non-scheduled hours. Gender differences are poised to increase as digital media choices multiply.

Arab nationals’ decisive preference for television in their native language is in sync with patterns identified by researchers worldwide since the 1980s; when attractive domestic productions are available, viewers prefer watching material that resonates linguistically, socially, and culturally. The quantity and quality of Arab television productions have grown in leaps and bounds in the last quarter century, particularly in drama, comedy, and news, precisely the three TV genres that remain Arab nationals’ favorite shows.

In contrast, it is not surprising that whereas nine out of 10 Arab nationals prefer to watch Arabic-language television, they are far more likely to watch English-language films. Whether this means they prefer films dubbed in English or films originally produced in English is unclear; what is irrefutable is that the Arab film industry remains woefully underdeveloped. Some documentaries and auteur films have met critical and limited commercial success, but nowadays even Egypt—once the Hollywood of the Arab world—struggles to produce mass entertainment blockbusters.

At the same time, the rise of the popularity of platforms like Netflix is likely to accelerate a trend whereby more Arabs watch non-Arabic language television, particularly English-language productions. The fact that very few Arab nationals have paid, or are willing to pay, for online television content is likely to be one of the most formidable challenges for the expansion of Netflix and its global and local competitors. Similarly, as we have recently seen in Canada, the spread of online streaming platforms like Netflix, whose business model often does not contribute financially to the communities where its viewers reside, may lead to renewed cries of cultural imperialism.

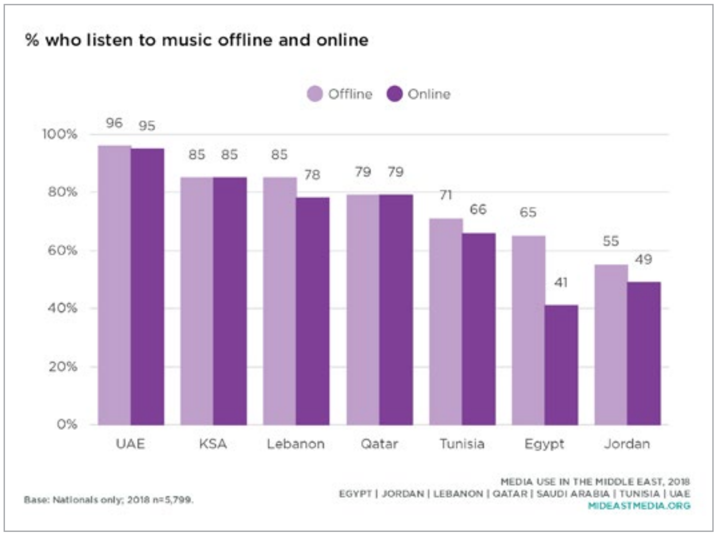
It is also interesting that screens and images now reign supreme among Arab nationals. After several years of significant declines in newspaper readership across the region, Arab societies are moving decisively into public spheres dominated by digital images. Whereas this has been the case in the West for at least a half-century, Arab nations lack the legal frameworks necessary to regulate the proliferation of images at an unprecedented scale and will need to upgrade these frameworks to keep up with changing television distribution and reception patterns.

MUSIC AND PODCASTS

In this chapter

- Music listening
- Means of accessing music
- Music preferences by geography and language
- Lasting appeal of music videos
- Paying for and sharing music-related content online
- Podcasts

Music listening



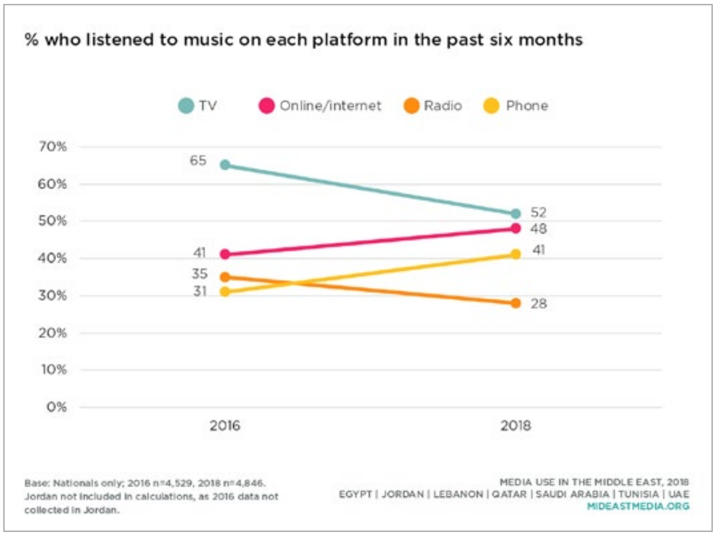
Most Arab nationals—about three-quarters—listen to music whether offline or online. Nearly all Emiratis listen to music compared to about half of nationals in Jordan and two-thirds of Egyptians. Interestingly, nationals are nearly as likely to listen to music online as offline, especially in the UAE, Saudi Arabia, and Qatar where online and offline listening rates are nearly identical. This represents an increase in listening to music online over the past two years in all countries except Egypt. The largest increases in online listening since 2016 were in Qatar, Lebanon, and Tunisia (24, 22, and 21 percentage point increases, respectively).

About three in 10 nationals listen to music online or offline every day. This rate is consistent across most countries but higher in Tunisia and the UAE where more than four in 10 nationals listen to music daily.

Music is part of everyday life for most Arab nationals, but daily listening decreases with age. About half of 18 to 24 year-olds listen to music online and offline every day, but this rate drops to a third of 25 to 34 year-olds, a quarter of 35 to 44 year-olds, and less than two in 10 nationals 45 and older. Older nationals are more likely than their younger counterparts to listen to radio every day, however this may include content other than music (20% 18-24 year-olds, 27% 25-34 year-olds, 32% 35-44 year-olds: 36% 45+ year-olds).

Education appears to play a role in music habits. Nearly four in 10 university-educated nationals listen to music online and offline daily compared to about three in 10 with a secondary education, one-quarter with an intermediate education, and less than two in 10 with a primary education or less.

Means of accessing music

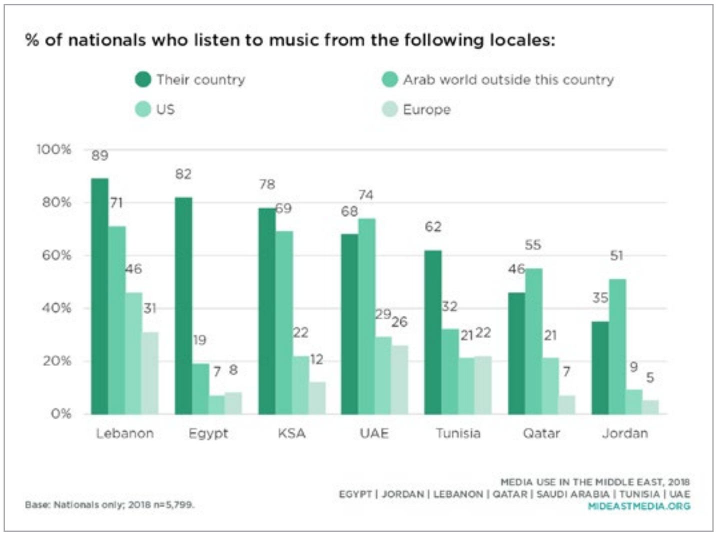


Arab nationals access music on multiple platforms: internet, TV, phone, and radio. However, habits are changing. Across the region, both listening to music online or on a phone rose by about 10 percentage points since 2016. At the same time, listening to music on TV or radio dropped by 13 and 7 percentage points, respectively.

Most Emiratis and Lebanese access music on all platforms; Qataris are most likely to use the internet generally or their phones specifically; Saudis use the internet and TV most often, while Egyptians mostly access music on TV. Fewer than half of Tunisians and Jordanians use any specific platform to access music.

The oldest age cohort (45+ year-olds) is more likely to access music on TV than online (49% TV vs. 22% online), while the youngest age group (18-24 year-olds) is more likely to access music online or on a phone than on TV (62% online, 57% phone vs. 49% TV).

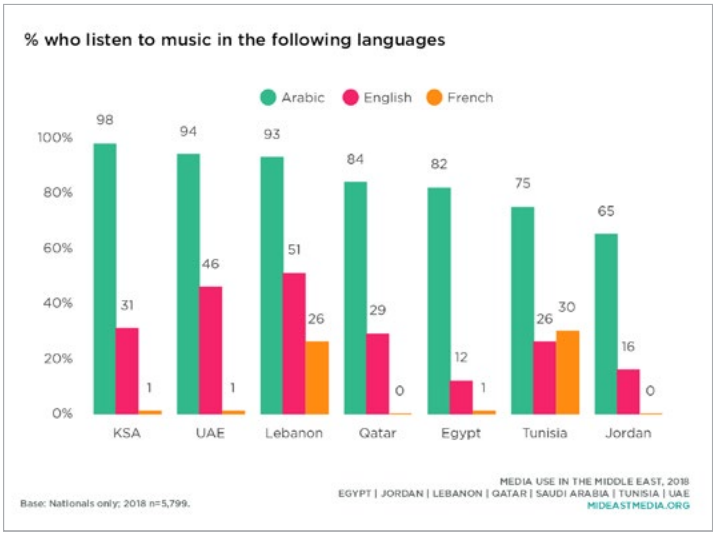
Music preferences by geography and language



Preferences for Arab music are strong—whether the music is from one's own country or another Arab country. Emiratis, Qataris, and Jordanians listen to music more from other Arab countries than their own, while more Egyptians, Lebanese, Saudis, and Tunisians listen to music from their own country than from other Arab countries. Still, a strong majority of Lebanese, Emiratis, and Saudis listen to Arab music from both inside and outside their own countries, while Egyptians listen almost exclusively to Egyptian music.

More Lebanese and Emiratis listen to Western music than other nationals. Western music is less popular among Saudis, Tunisians, Qataris, and Jordanians—among whom one in five or fewer listen to music from either the U.S. or Europe—and even less popular in Egypt, where fewer than one in 10 listen to music from these locales.

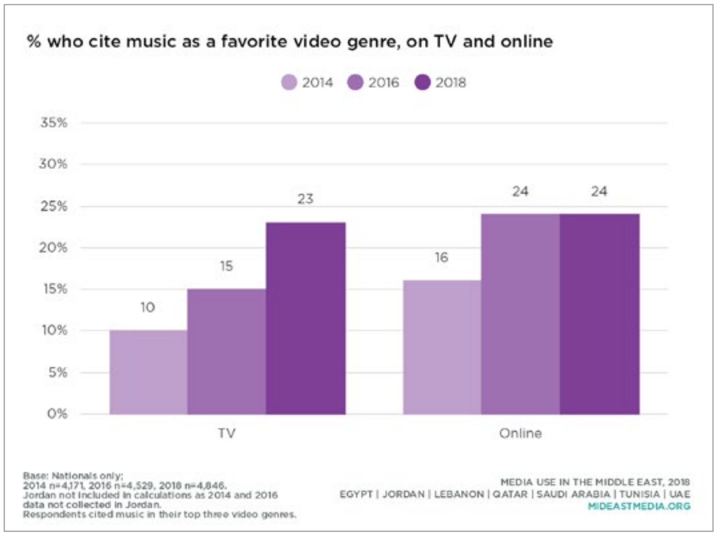
Both age and education are associated with preferences for music from the U.S. Three in 10 of the youngest age cohort listen to music from the U.S. compared with only one in 10 of the oldest cohort (31% 18-24 year-olds, 25% 25-34 year-olds, 19% 35-44 year-olds vs. 9% 45+ year-olds). Similarly, preference for music from the U.S. is higher among nationals with more education (2% primary or less, 10% intermediate, 24% secondary, 32% university or higher).

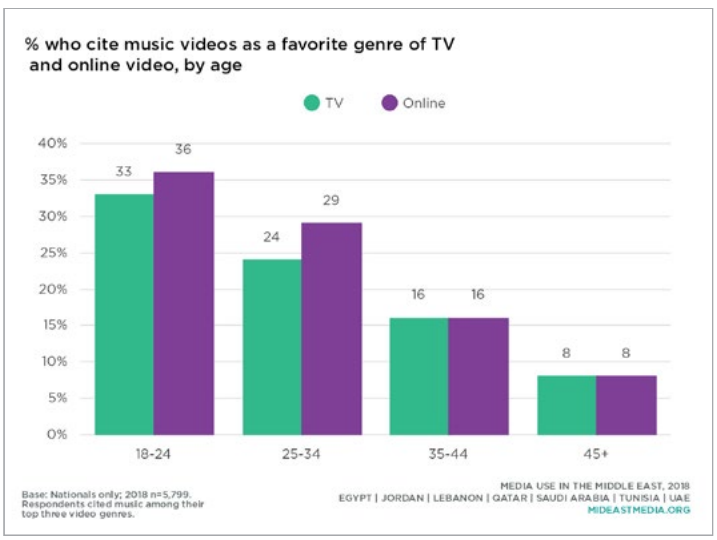


A vast majority of Arab nationals across the region listens to music in Arabic—over nine in 10 Lebanese, Saudis, and Emiratis and two-thirds or more Jordanians, Qataris, Egyptians, and Tunisians. Some nationals listen to music in English, ranging from 12% of Egyptians and 16% of Jordanians to about half of Lebanese and Emiratis. Only in Lebanon and Tunisia do some nationals listen to music in French. In Tunisia, French music is more popular than English.

Listening to music in English varies modestly by gender but more so by age and education. A few more men than women listen to music in English (30% vs. 26%, respectively). However, the youngest nationals listen to music in English at over three times the rate of the oldest nationals (43% 18-24 year-olds vs. 12% 45+ year-olds), and the most educated nationals listen in English at more than 13 times the rate of the least educated (41% university or higher vs. 3% primary or less).

Lasting appeal of music videos

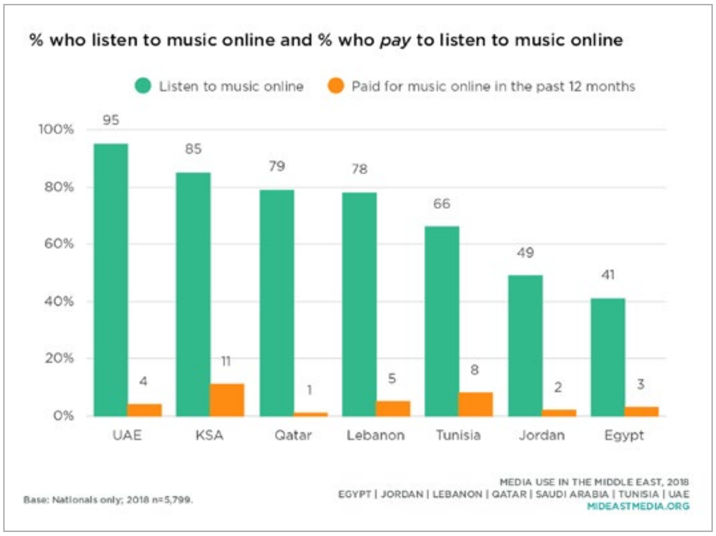


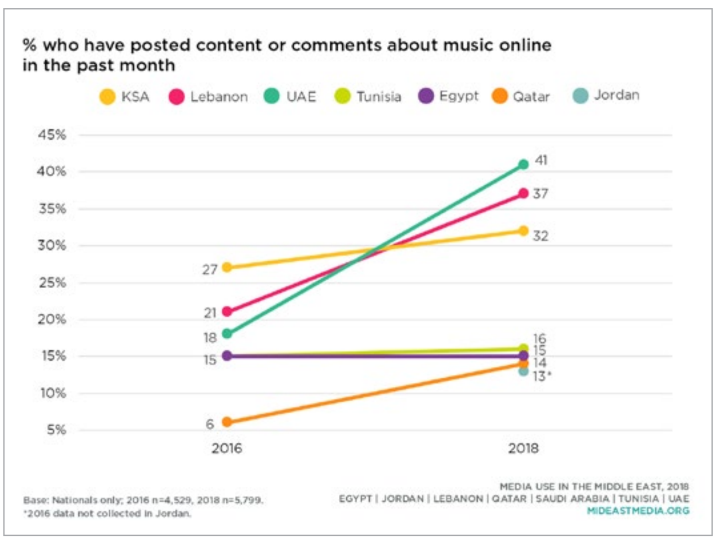


The popularity of music videos as a favorite genre continues to increase both on TV and online. One-quarter of all Arab nationals in 2018 list music videos among their three favorite genres of TV and online video. Compared with 2014, this represents 13 and eight percentage point increases for TV and online video, respectively.

The increase in watching music videos, both on TV and online, is fueled primarily by younger respondents; about four times as many of the youngest nationals (18-24 year-olds) compared to their oldest counterparts (45+ year-olds) identify music videos as a favorite on both platforms. Of note, nationals under 35 years old are more likely to name music videos as a favorite genre of online video than for TV.

Paying for and sharing music-related content online





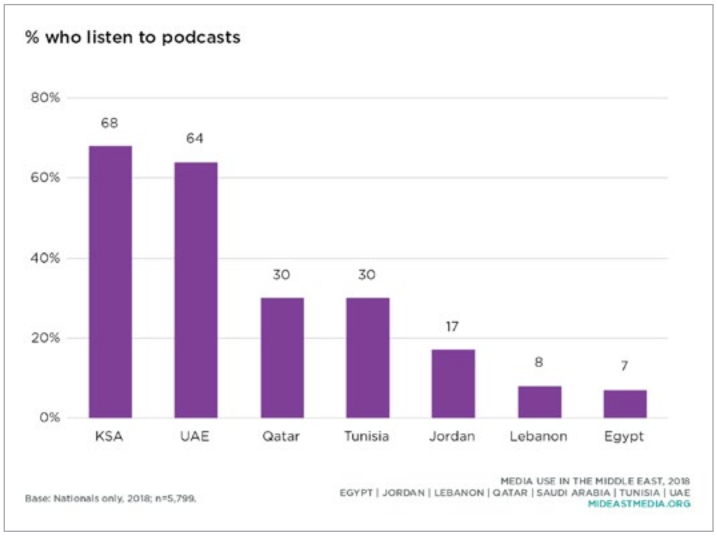
While most Arab nationals listen to music online, few pay to do so. Most Arab nationals listen to music online. However, across countries, as few as 1% (Qatar) and no more than 11% (KSA) have paid to listen to music online in the past year.

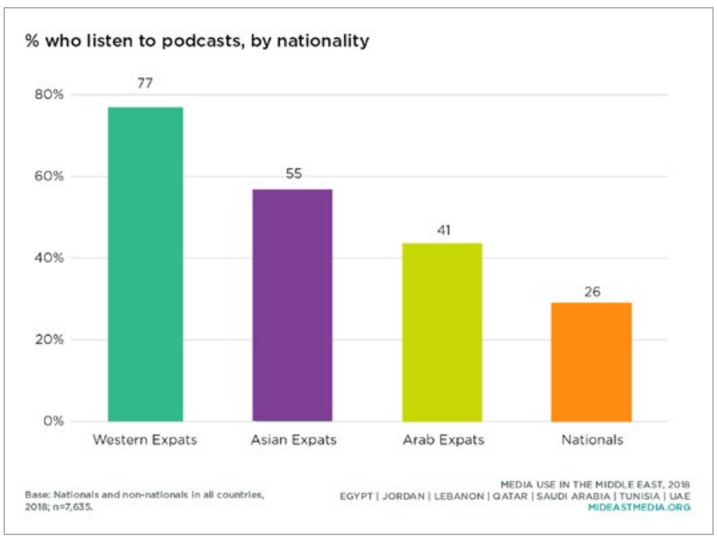
Younger nationals are more likely to be willing to pay and to have paid for music online, but the numbers are low even among this group (willing to pay: 11% 18-24 year-olds, 7% 25-34 year-olds, 5% 35-44 year-olds, 1% 45+ year-olds; have paid in the past 12 months: 8% 18-24 year-olds, 6% 25-34 year-olds, 5% 35-44 year-olds, 1% 45+ year-olds).

The portion of Arab nationals sending, sharing, or posting about music online in the past month grew since 2016 (24% in 2018 vs. 18% in 2016). This holds in every country except Egypt and Tunisia, where rates of posting about music remained low—about 15%—in each country. More Emiratis post about music than other nationals followed by Lebanese and Saudis (41%, 37%, 32%, respectively). The shares of both Qataris and Emiratis who post music-related content online more than doubled since 2016.

Posting about music is most common among the youngest nationals and decreases with age (34% 18-24 year-olds, 28% 25-34 year-olds, 18% 35-44 year-olds, 8% 45+ year-olds).

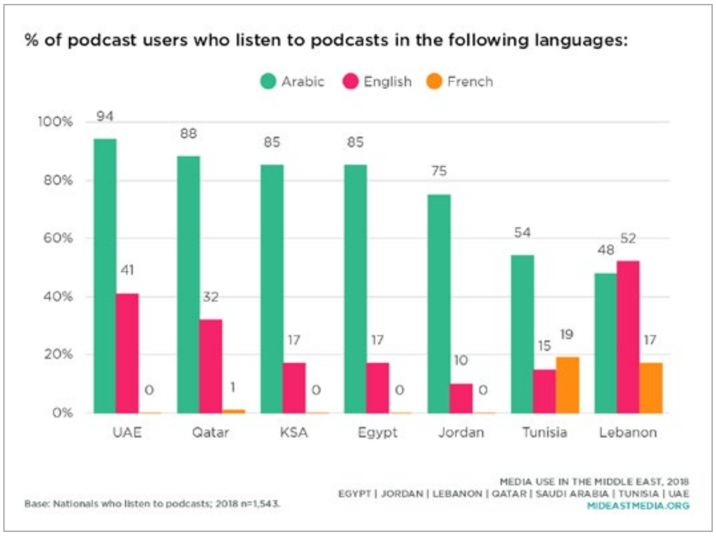
Podcasts

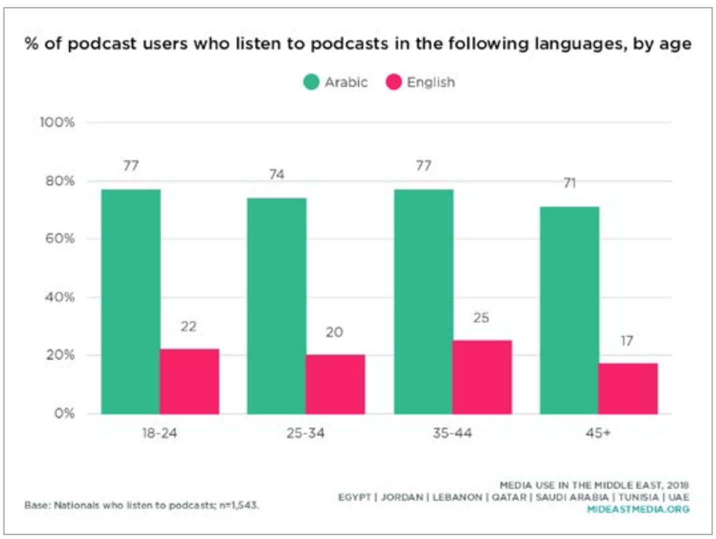




Podcasts are a common way many Arab nationals access entertainment and news. Nearly three in 10 nationals listen to podcasts. However, this average masks wide variation by country which ranges from two-thirds of Saudis and Emiratis to fewer than one in 10 Lebanese and Egyptians.

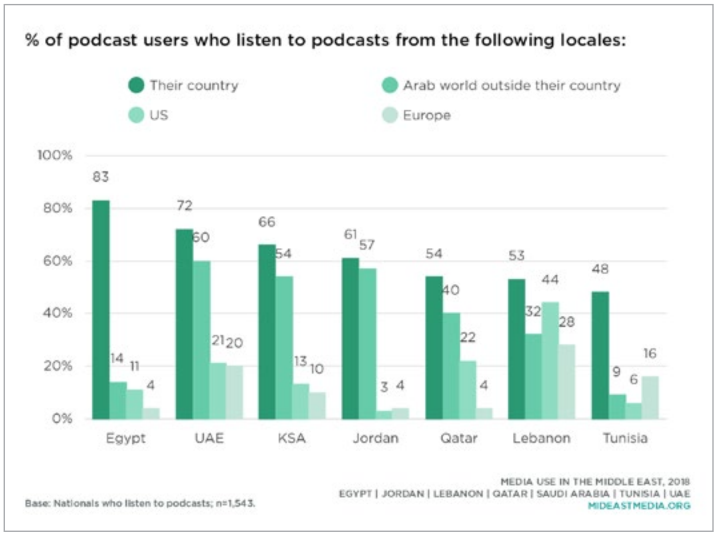
Younger nationals are twice as likely to listen to podcasts as their oldest counterparts (33% 18-24 year-olds, 31% 25-34 year-olds, 23% 35-44 year-olds vs. 15% 45+ year-olds). Additionally, highly educated nationals are much more likely to listen to podcasts (36% university or higher, 29% secondary, 13% intermediate, 8% primary or less). Furthermore, expats are far more likely than nationals to listen to podcasts; 77% of Western expats use the medium compared to 26% of Arab nationals.





The Arabic language dominates podcasts Arab nationals listen to—eight to nine in 10 of podcast users in the UAE, Egypt, Qatar, Saudi Arabia, and Jordan listen in Arabic. Half of Lebanese, four in 10 Emiratis, and three in 10 Qataris listen to English podcasts. Lebanese nationals listen almost equally in Arabic and English, with English having the slight edge. About one in five Tunisian and Lebanese podcast users listen in French.

Podcasts are one of the few areas with similar preferences across age groups. About three-quarters of Arab nationals of all ages who listen to podcasts do so in Arabic and about one-fifth across age groups listen in English. In contrast, university-educated nationals who listen to podcasts are two to five times more likely to listen in English than any other group (30% university or higher vs. 16% secondary, 13% intermediate, 6% primary or less).

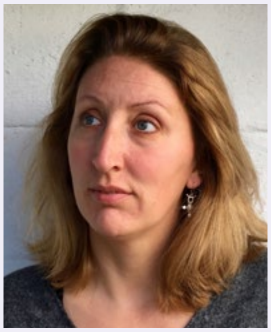


The podcasts Arab nationals listen to originate mostly from their own country or elsewhere in the Arab region. Lebanese listen to the most diverse set of podcasts; more than four in 10 originate from either Lebanon or the U.S. and about a third each from other Arab states or Europe. Listening to Western podcasts is least common in Egypt, Jordan, and Tunisia. In fact, Egyptian and Tunisian podcast users listen almost exclusively to podcasts originating from their own country.

Among podcast users, more men than women listen to podcasts from outside their country, while women are more likely to listen to podcasts from within their country (Arab world outside this country: 42% men vs. 37% women; this country: 64% women vs. 59% men). Both genders listen to podcasts from the U.S. and Europe in roughly the same proportions.

Arab nationals across age groups listen to podcasts from their own country in equal proportions—about six in 10. Younger nationals, though, are more likely to listen to podcasts that originate outside their country (Arab world outside their country: 44% 18-24 year-olds, 43% 25-34 year-olds, 31% 35-44 year-olds, 33% 45+ year-olds; U.S.: 14%, 14%, 15%, 8%, among podcast users). The likelihood of listening to podcasts from each locale rises with education level (their country: 53% primary or less, 56% intermediate, 60% secondary, 65% university or higher; Arab world outside their country: 23%, 14%, 41%, 45%; U.S.: 3%, 4%,11%, 19%, among podcast users).

Perhaps not surprisingly, majorities of Western expatriates who are podcast users listen to podcasts from the U.S. and Europe (74% and 58%, respectively).



PODCASTS POISED FOR TAKE-OFF IN MIDDLE EAST MARKETS

Commentary by Ursula Lindsey
Al-Fanar Media

In the seven countries surveyed, listening to music is widespread. It is an important daily habit, especially among young people. About three-quarters of Arab nationals listen to music, and about three in 10 of them listen to it every day. But the way people access music is changing quickly; since 2016, listening to music on a phone or online has increased by 10 percentage points, which is in line with a general shift towards accessing news and entertainment through smartphones.

In fact, in most of the countries surveyed today, respondents are as likely to listen to music online as offline. Qatar, Lebanon, and Tunisia saw increases in online listening of over 20 percentage points since 2016. Meanwhile listening to music on TV and radio has dropped by 13 and 7 points respectively. These trends are even more marked among the young (18-24 year-olds), who both listen to music most often and are most likely to do so online.

Higher levels of education also correlate with more daily music listening and with more listening to music from the U.S. and Europe, perhaps reflecting different language skills and an international outlook among the more highly educated. Arabic music is nonetheless the most popular, with large majorities reporting that they listen mostly to music from their own country or from the Arab world. But there is also a quite varied mix of music consumed in almost every country.

Nationals in the UAE, Qatar, and Jordan—small countries without a large music production industry of their own—listen to more music from the larger Arab region than from their own country. Lebanon, a country with a particularly cosmopolitan history, listens to large amounts of music from the Arab region, the U.S., and Europe. Listeners in Egypt—the most populous Arab country and home to a large domestic music industry—stand out for their high consumption of music from their own country and low level of listening to music from anywhere else. Egypt is also the country in which people listen to the least amount of music in English or French, whereas in many other countries a quarter to half of nationals report listening to music in one of those languages.

The popularity of music videos has continued to increase, especially among the young. About a quarter of all respondents cited them as a favorite genre of videos on TV and online. Music is also an increasingly popular subject of online sharing and discussion, especially in the UAE, Lebanon, Saudi Arabia, and Qatar.

However, it is worth noting that the percentage of listeners who pay to listen to music online remains quite small—in the UAE, where 95 percent of respondents said they listened to music online, only 4 percent said they had paid for such music. Accessing music online and on phones has become very common but paying for it has not.

Another emerging online medium, podcasts, has a fast-growing audience but has yet to find its business model. This survey presents some of the very first available data on podcasts in the Arab region. It shows that podcasts, a popular medium worldwide, are beginning to take off in Arab countries. Almost three out of 10 Arab nationals listen to podcasts, although there are very wide variations by country; the percentage of respondents who listen to podcasts ranges from 68 percent in KSA to 30 percent in Tunisia to 7 percent in Egypt. (Across the region, rates of podcast listening are relatively higher among Western, Asian, and Arab expats than nationals).

It appears extremely likely that the audience for podcasts will continue to grow. Already, several independent podcast production networks have sprung up, such as the Sowt network in Jordan and the mstdfr network in KSA. The first Middle East Podcast Forum was held in Dubai in September 2018. Online music distributors such as the music streaming platform Anghami are beginning to distribute podcasts, and there is also an increased interest on the part of media companies in producing podcasts.

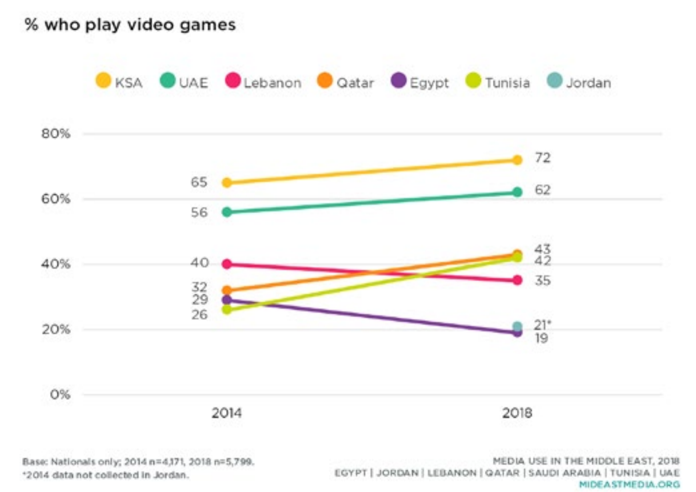
About three-quarters of all podcast listeners listen to podcasts in Arabic and about one-fifth listen to ones in English. Those who are younger and who are university-educated are more likely to listen to podcasts in foreign languages or that are from outside their countries. As the medium continues to grow, one can expect a significant increase in locally-produced podcasts. The online medium also offers listeners an opportunity to hear conversations and debates from the region and from other parts of the world—debates that are often more informal and open, in tone and substance, than what is currently aired on traditional media channels.

GAMES

In this chapter

- Who’s playing
- Playing games alone vs. with others
- Paying for online access to video games

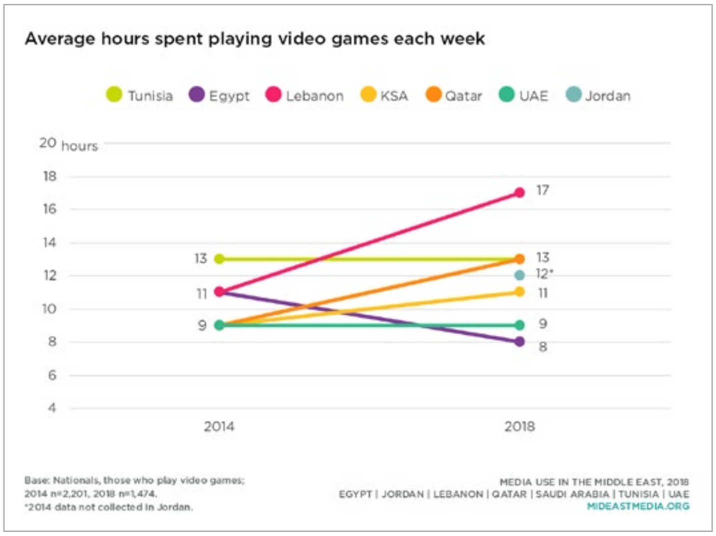
Who’s playing



Video gaming among Arab nationals has remained consistent since 2014—four in 10 nationals play games—but varies widely by country. More Saudis and Emiratis than any other nationals play video games, and Jordanians, Egyptians, and Lebanese are the least likely nationals to play.

Gaming varies by key demographics. Men are more likely to play video games than women, though three in 10 women also play (44% men vs. 31% women). More than half of the youngest nationals play video games, three times the rate of the oldest cohort (55% 18-24 year-olds, 45% 25-34 year-olds, 31% 35-44 year-olds, 16% 45+ year-olds). Similarly, the most-educated nationals are four times as likely to play video games as those with a primary education or less (46% university or more, 43% secondary, 24% intermediate, 10% primary or less).

Given the near-saturation levels of smartphone ownership in most Arab countries studied here—eight in 10 of all nationals own a smartphone—it is perhaps not surprising that over half of nationals play games on a phone at least occasionally, up from 44% as recently as 2016. Moreover, one-quarter of all nationals play on a phone daily. Majorities of nationals in all countries except Jordan and Egypt play games on a phone (86% UAE, 81% KSA, 53% Qatar, 53% Tunisia, 49% Lebanon, 38% Jordan, 37% Egypt).

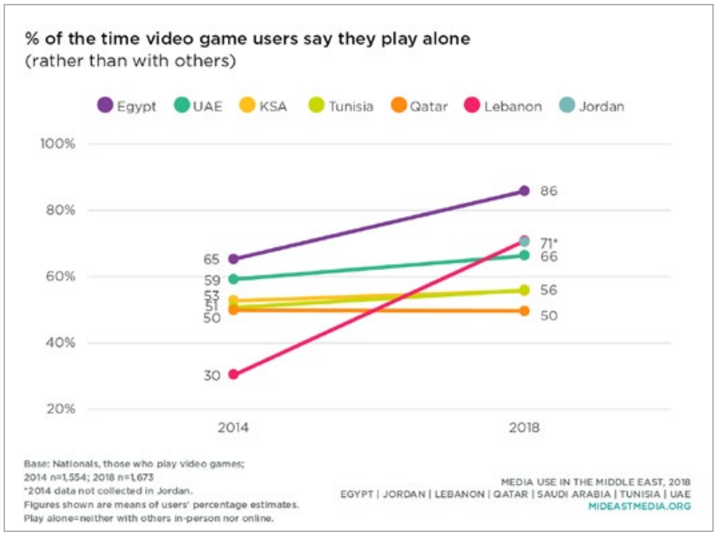


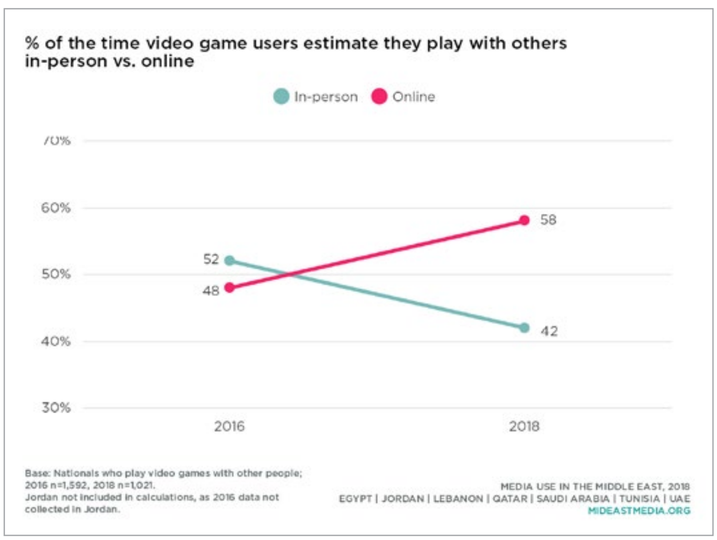
A majority of men and nearly as many women play games on a phone (56% men, 48% women), but doing so differs across age and education categories. Seven in 10 of the youngest age group play games on a phone at all (39% play every day) compared to just one-fourth among the oldest nationals (71% 18-24 year-olds, 64% 25-34 year-olds, 45% 35-44 year-olds, 24% 45+ year-olds) and the likelihood of phone gaming increases with education (20% primary or less, 39% intermediate, 58% secondary, 60% university or more).

More nationals in 2018 than 2016 said their time spent playing console video games and games on a phone both increase during Ramadan.

Nationals who play video games spend about 12 hours each week doing so, up from about 10 hours per week in 2014. There is considerable variation across countries; Lebanese gamers spend the most time playing compared to other nationals and Egyptians the least (17 hours vs. 8 hours).

Playing games alone vs. with others

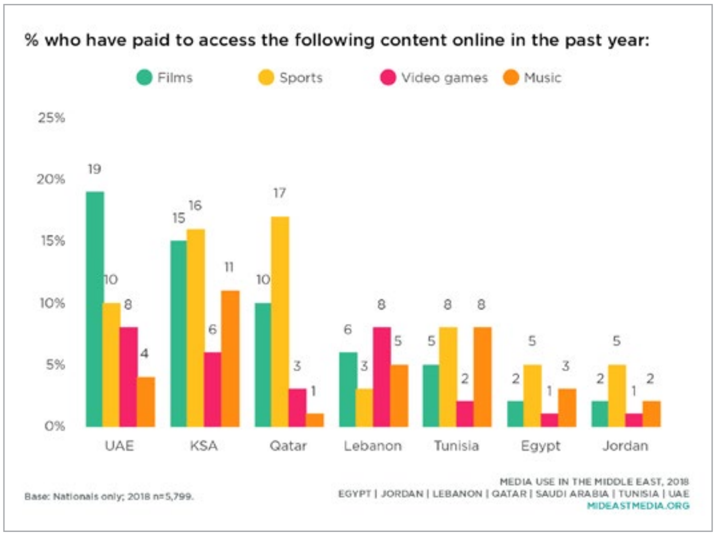




In Qatar, Saudi Arabia, and Tunisia, people are roughly as likely to play video games alone as they are to play with others, while those in Egypt, Jordan, Lebanon, and the UAE are more likely to say they play alone. In 2014 and 2016, the time spent playing video games with others was roughly equally split between online and in person. In 2018, gamers are more likely to play with others online than in person.

Women estimate that more of the time they spend playing video games is alone than with others, and the gap is greater than that among men (percent of time playing that is alone: 73% women vs. 64% men). Older gamers play alone more often than younger nationals (79% 45+ year-olds, 71% 35-44 year-olds, 69% 25-34 year-olds, 63% 18-24 year-olds). When playing video games with others, younger gamers spend a higher proportion of time doing so online (versus in person) than older respondents who play video games, but even the oldest nationals estimate that half of their time playing with other people is online (time playing with others is online: 62% 18-24 year-olds, 59% 25-34 year-olds, 52% 35-44 year-olds, 53% 45+ year-olds).

Paying for online access to video games



Arab nationals are not inclined to pay to play video games online, and fewer than one in five have paid to access online video games in the previous year. Larger shares of Lebanese and Emiratis than other nationals are open to paying for online games, but only 8% of each of these groups has done so in the past year.

The youngest age cohort—who are more likely to play video games online—is the most likely to have paid to do so in the past year, but still, fewer than one in 10 of this youngest group paid for online access to video games in the prior year (8% 18-24 year-olds, 4% 25-34 year-olds, 2% 35-44 year-olds, 1% 45+ year-olds).

GAMING GOES MOBILE

Commentary by Eric Espig
Northwestern University in Qatar

Over the past year, not only have the demographic data of gamers in the Middle East shifted significantly, but also usage data—how often and how long they play as well as their motivation to play. The most notable change in gamer user data, however, is found in the increase in the popularity of mobile gaming over console- and PC-based gaming. To understand why this shift to mobile platforms is related to a shift in the demographic data of gamers, it is helpful to look back at some of the milestones of 2018 that were a part of the video game landscape context.

Historically, a majority of survey respondents who identified as gamers has been young and male. In 2018 as in 2014, four in 10 nationals played games on console and PC platforms. However, this year, the overall demographic of gamers across mobile devices has shifted and skewed in the direction of both older and female users. Seventy-five percent of all smartphone users in the Middle East now play games on their personal devices and 25 percent do so every day. In countries where smartphone saturation nears 100 percent such as in UAE and Qatar, a significant number of women and people of all ages are playing games on their phones.

In a global context, in 2018, the video game industry achieved unprecedented growth in mobile gaming sales. Overall, the video game revenue of 2018 increased by an incredible 12 percent and totaled $137.9 billion. And even more significantly, video games for smartphones have for the first time accounted for over 50 percent of all game sales, grossing $70.3 billion. This means that over half of the market for video game developers has moved out of people's consoles and PCs, to which games were once relegated, and into people's pockets and handbags where they are always ready to play while waiting in line or during daily commutes. This demographic data of who plays games, how often, and why will continue to shift and has been captured well in the results of this survey of smartphone users.

Video games developed for smartphones are popular among casual gamers, while console-based games are predominantly developed for two groups of users. These two groups of primarily console users are commonly known as core and hardcore gamers. They play more often and for more competitive reasons. On the other hand, casual gamers are defined by a non-competitive or completion-based motivation to play. In coming years, we will continue to see the rise of casual gamers as more game products are developed for smartphones. These smartphone games are designed to be less competitive, more completion-based, and less time intensive, which makes these games more appealing to these casual gamers.

Both the increased popularity of smartphone games and the declining growth of users of console-based games are reflected in the survey results. However, among those console users, we find that nationals who play video games spent more time doing so in 2018—about 12.4 hours each week—up from 10.5 hours weekly in 2014. This can be explained in part by the massively successful products launched in 2018 for console and PC.

Console games released in late 2017 and early 2018 included many successful and highly anticipated follow-ups to established game franchises, including Grand Theft Auto, Assassin's Creed, Star Wars Battlefront, and Legend of Zelda. Blockbusters such as these likely impacted the amount of time dedicated to console gaming among core and hardcore users. This group is mostly comprised of young men, and nearly six in 10 of the youngest nationals (18-24 year-olds) surveyed in the Middle East play video games. That number is more than three times the rate of the oldest cohort (45+ year-olds).

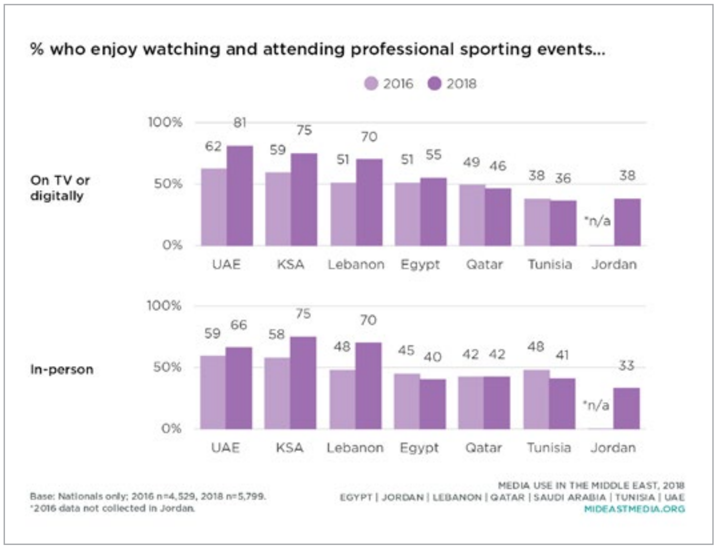
In 2019 and beyond, we should continue to see a rise in the number of casual gamers as more game products that are less competitive and time-intensive are developed for smartphones. But because the motivation to play for the primarily console-based core and hardcore gamers differs from the primarily smartphone-based casual gamers—competition vs. completion-based—we should not expect to see one-to-one growth in both groups. However, as the quality of newly released console-based games remains high—such as the record-smashing Red Dead Redemption 2, which grossed $275 million in its first three days of release in late 2018—the time these core and hardcore gamers spend playing will increase. And as the console-based games these core users traditionally play begin to cross over to the smartphone markets, the distinction between console and smartphone games will decrease, and the market growth for games that had traditionally been PC- and console-bound will likely expand, as those games reach more casual gamers on mobile devices.

SPORTS

In this chapter

- Popularity of sports
- Football: A clear favorite
- Paying for and sharing sports content online
- Exercising and playing sports

Popularity of sports

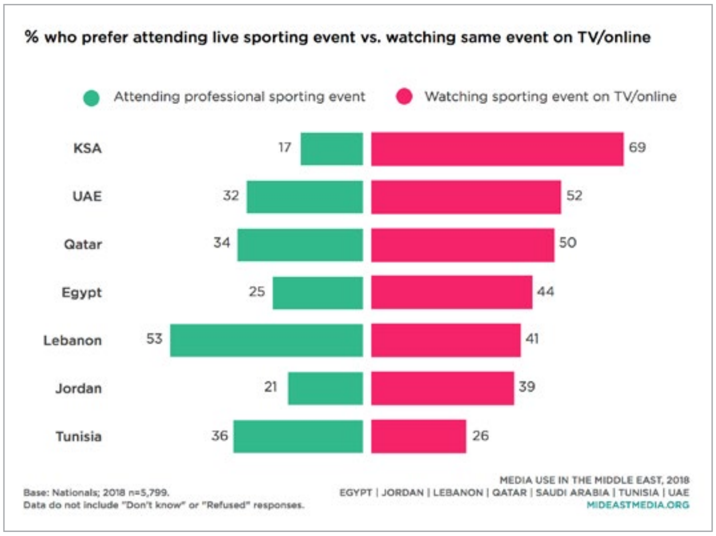


Professional sports are an important source of entertainment in many countries, including those in the Arab region. More Arab nationals now than in 2016 say they enjoy watching sports on TV/digitally or in-person at sporting events. Large majorities of Emiratis, Saudis, and Lebanese express enthusiasm for watching and attending sporting events, representing 15 percentage point increases or more in each country since 2016 in the share of nationals keen on sports viewing. Fewer than half of Qataris, Jordanians, and Tunisians, however, say they enjoy sports—figures similar to those reported in 2016. Around half of Egyptians enjoy watching sports on TV, and four in 10 enjoy attending professional sporting events.

Men are more likely than women to say they enjoy watching and attending sporting events, but a sizeable minority of women also enjoys sports (watch on TV or digitally: 71% men vs. 38% women; attend: 67% vs. 34%).

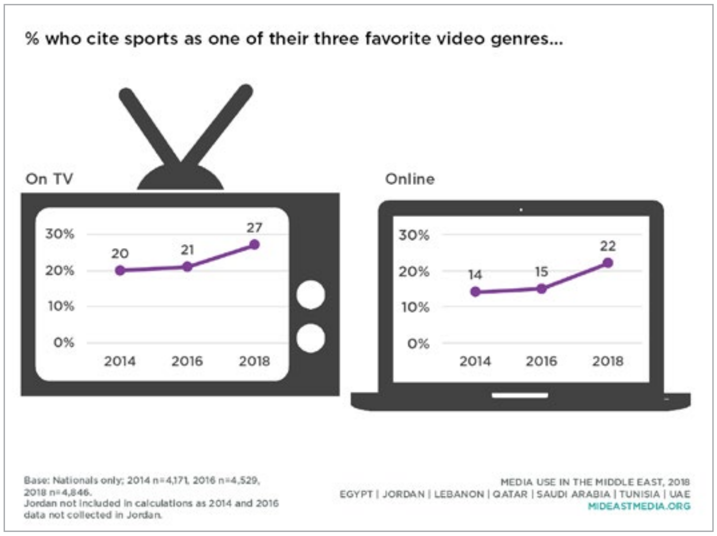
Younger nationals are somewhat more likely to say they enjoy watching or attending sporting events than older respondents, but still nearly half of the oldest group enjoys watching sports on TV (watching sports on TV/digitally: 59% 18-24 year-olds, 56% 25-34 year-olds, 53% 35-44 year-olds, 48% 45+ year-olds; attending sporting events: 57% 18-24 year-olds, 53% 25-34 year-olds, 49% 35-44 year-olds, 43% 45+ year-olds).

Educated nationals are more likely to express interest in sports viewing. Sixty-two percent of Arab nationals with a university degree or higher enjoy watching sports on TV or digitally compared to just 38% with a primary education or less. And 58% of college-educated nationals enjoy attending professional sporting events versus 30% of the least-educated group.



More Arab nationals who self-identify as culturally progressive follow sports than self-identified cultural conservatives. Six in 10 progressives enjoy attending or watching sports on TV or digitally compared with half of conservatives (attend: 61% progressive vs. 47% conservative; watch: 62% progressive vs. 51% conservative).

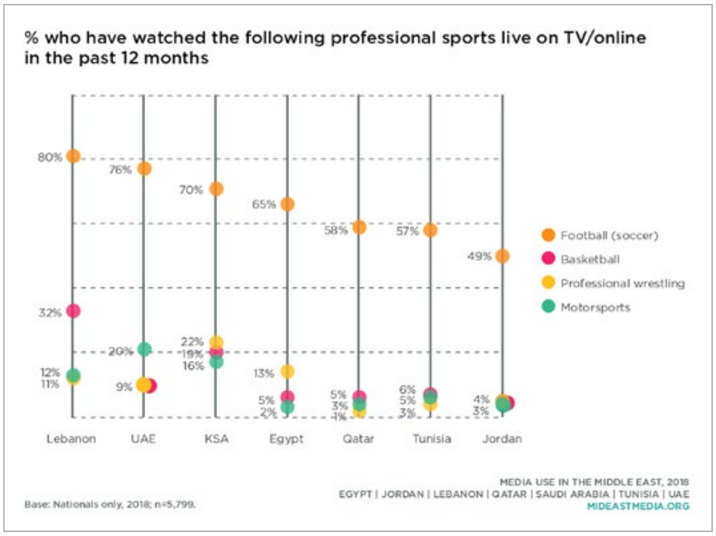
While many nationals say they enjoy watching sports on a screen and also attending sporting events, when presented with a choice of one or the other, Saudis, Emiratis, Egyptians, Qataris, and Jordanians prefer to watch on TV/digitally, while Lebanese and Tunisians prefer to attend the event. Notably though, many Jordanians and Tunisians—fewer of whom express enjoyment of sports generally—don't express a preference for either (39% and 32%, respectively say they don't know which they prefer). Such ambivalence from Tunisians is interesting, as Tunisia was among the 32 countries in the 2018 World Cup. Saudi Arabia was also in the 2018 World Cup, though considerably more Saudis than Tunisians expressed interest in both attending sporting events and watching on a screen.

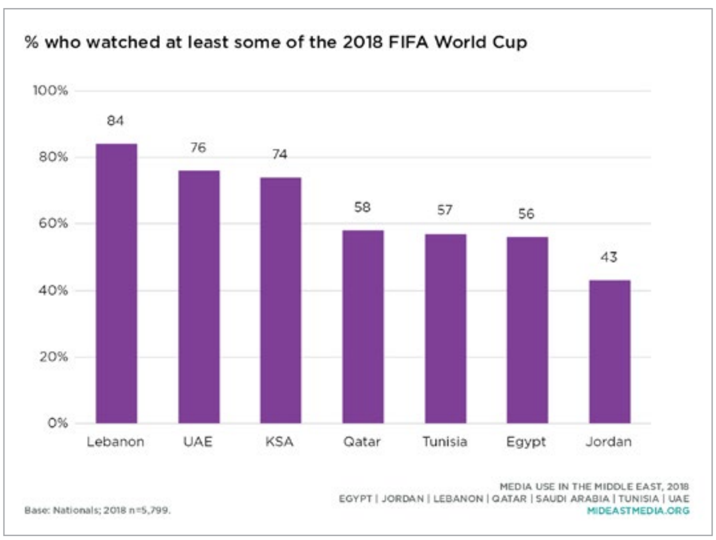


More nationals list sports as among their favorite three genres of TV and online video now than in 2016 (TV: 21% in 2016 vs. 27% in 2018; online: 15% in 2016 vs. 22% in 2018). Interest in sports as a genre is particularly high in the UAE and Saudi Arabia, where it surpasses news as a top three favorite genre both on TV and online (TV: 42% UAE, 33% KSA; online: 37% UAE, 29% KSA). Sports are less likely to be a top three genre among Jordanians and Lebanese (TV: 18% and 16%, respectively; online: 20% and 12%, respectively).

Men are six times more likely than women to name sports as one of their three favorite genres of both TV and online video. Education also plays a role; one in three nationals with a university education or higher lists sports as a top three favorite TV genre compared to 13% with a primary education or less, 20% with an intermediate education, and 27% with a secondary education. Age plays less of a role, but fewer nationals in the oldest age group (45+ year-olds) express interest in sports (TV: 30% 18-24 year-olds, 29% 25-34 year-olds, 24% 35-44 year-olds,18% 45+ year-olds; online: 27% 18-24 year-olds, 27% 25-34 year-olds, 22% 35-44 year-olds, 11% 45+ year-olds).

Football: A clear favorite



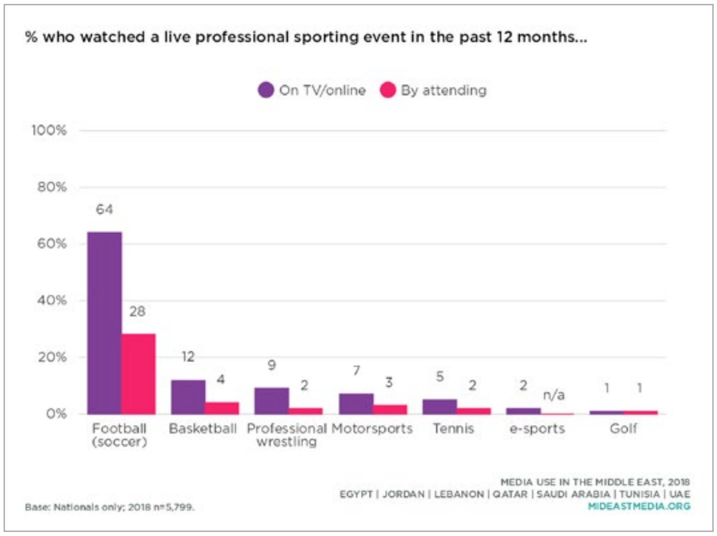


Football/soccer is by far the most popular sport to watch or attend among respondents in these samples. Most nationals in all countries watched football on TV or online in the past 12 months, ranging from 80% in Lebanon to 49% in Jordan. Measured in this way, no other sport comes close, though other sports did register moderate popularity in some countries. In Lebanon, one-third of nationals watched basketball in the previous 12 months. One in five Saudis watched basketball and professional wrestling, and nearly as many Egyptians watched professional wrestling in the previous year. In the UAE, one in five watched motorsports. In Jordan, Qatar, and Tunisia, however, no sport other than football was watched by a substantial share of the population.

Men are more likely to watch football/soccer than women, but while eight in 10 men have watched football on a screen in the past 12 months, nearly half of women have done so as well (81% vs. 47%, respectively).

The 2018 World Cup likely influenced frequencies of watching football/soccer on TV or online in the prior year, especially as three of the seven countries studied competed in the tournament (KSA, Egypt, Tunisia). Most nationals in all countries, except Jordan, watched at least some of the World Cup (84% Lebanon, 76% UAE, 74% KSA, 58% Qatar, 57% Tunisia, 56% Egypt, 43% Jordan).

The 2018 World Cup was widely popular in the Arab countries surveyed here. Among nationals in all seven countries, eight in 10 men and nearly half of women watched at least some of the World Cup (80% vs. 46%, respectively). Two-thirds of nationals under 45 years old and half of those 45 years and older watched (67% 18-24 year-olds, 66% 25-34 year-olds, 65% 35-44 year-olds, 53% 45+ year-olds). Seven in 10 of nationals with a university degree watched the World Cup as did 66% with a secondary, 58% with an intermediate, and 40% with a primary education or less.

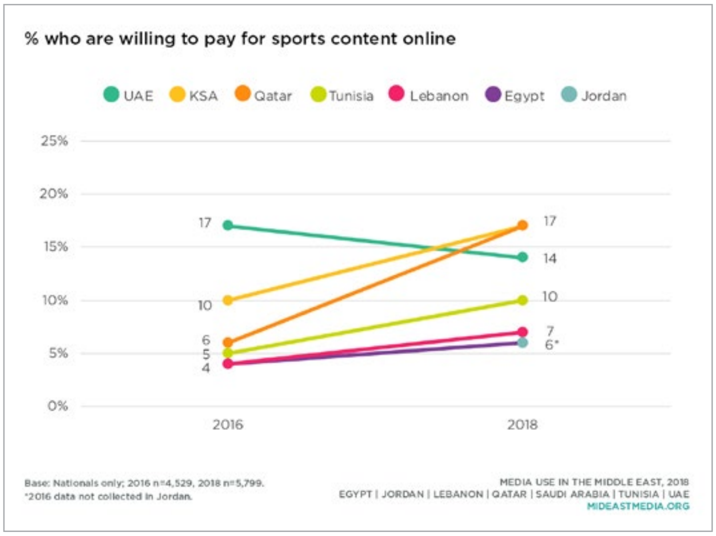


Attending sporting events varies widely by country. Nearly half or more of Saudis, Tunisians, and Emiratis attended at least one sporting event in the previous 12 months (58%, 56%, and 47%, respectively). Comparatively fewer nationals attended a sporting event in Qatar, Jordan, or Lebanon (41%, 27%, and 27%, respectively). Sporting event attendance is considerably lower in Egypt than in other Arab nations, as fewer than one in ten Egyptians attended any live professional sporting event in the past year.

Live football attracts more attendees overall in these seven countries than do other professional sports. More than four in 10 Saudis, Tunisians, and Emiratis attended a football match in the previous 12 months (46%, 46%, and 42%, respectively) compared with 33% of Qataris, 21% of Lebanese, and 19% of Jordanians. No other sporting event was attended by more than 10 percent of nationals in any country. In Egypt, only 5% said they attended a football match in the past year.

Men are more than twice as likely as women to have attended a football match in the past 12 months, though nearly one in five women did so (39% vs. 18%, respectively). One-third of nationals under 45 years old attended a football match in the past 12 months compared with one-fifth of those 45 years and older (31% 18-24 year-olds, 33% 25-34 year-olds, 28% 35-44 year-olds vs. 20% 45+ year-olds). Attendance differs by education level. Approximately one-third of those with a secondary education or higher attended a football match in the previous 12 months, compared to just one-fifth of nationals with less than a secondary education (32% university or more, 31% secondary vs. 21% intermediate, 16% primary or less).

Paying for and sharing sports content online



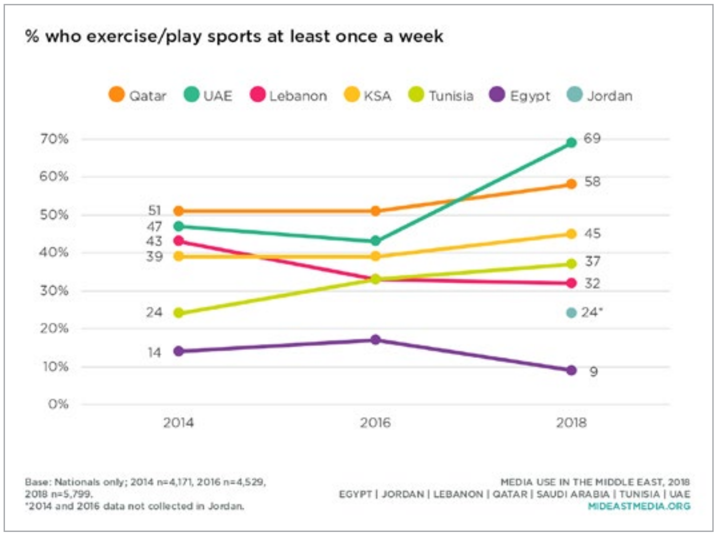
While Arab nationals are somewhat reluctant to pay for any online content, they are more willing to pay for sports and films than other content (10% and 9%, respectively). Willingness to pay for online sports content increased among nationals between 2016 and 2018 as did the share of respondents who said they paid for online sports access in the prior six months. Qatar and Saudi Arabia saw the largest increases in willingness to pay for sports online, rising from 6% in 2016 to 17% in 2018 in Qatar and from 10% to 17% in Saudi Arabia. Fewer internet users in Jordan, Egypt, and Lebanon expressed willingness to pay to access sports online—6%, 6% and 7%, respectively.

Men are far more likely than women to both watch sports online and to have paid for it in the past year (willing to pay: 17% men vs. 2% women; have paid: 13% vs. 2%, respectively).

Consistent with a greater general interest in sports viewing, more respondents say they share content or comment on sports online. Arab nationals are twice as likely in 2018 than in 2014 to have sent, shared, or posted content or comments online related to sports in the prior month (9% in 2014 vs. 19% in 2018).

Men are much more likely than women to have posted about sports in the past month (31% vs. 5%, respectively). Those under 45 years of age are far more likely to have posted about sports compared to those at least 45 years old (21% 18-24 year-olds, 23% 25-34 year-olds, 17% 35-44 year-olds,10% 45+ year-olds).

Exercising and playing sports



Fitness habits vary widely across countries. Large majorities of nationals in all countries except Egypt and Jordan say they exercise or play sports at least sometimes, but regular participation of at least once a week varies from a low of 9% in Egypt to a high of 69% in the UAE.

Physical activity also varies widely by demographics. Men are more likely than women to engage in physical activity at least once a week (39% vs. 25%, respectively). Additionally, exercise is far less common among older respondents; around four in 10 nationals 18 to 24 years old exercise or play sports at least once a week, while only 16% of those 45 years old and older do so. Education also plays a role. Nearly half of those with a university degree exercise or play sports weekly (46%). This drops to 34% among those with a secondary education, 18% with an intermediate education, and 9% of those with a primary education or less.

MIDDLE EAST RECEPTIVE TO DIVERSE SPORTS MEDIA, BUT TESTED BY PIRACY

Commentary by Craig LaMay
Northwestern University in Qatar

The sports media market in the Middle East has strong growth potential as states attempt to develop their commercial sport sectors and new streaming providers target the region's overwhelmingly young population. Historically, sport in the region has been a state-led business, and nearly every Arab country has its own state-run sports TV station. The number of private free-to-air and pay-TV sports channels has increased in the last decade, however, and according to a 2017 Deloitte study commissioned by the Josoor Institute, pay-TV subscriptions were the largest category of expenditure among football fans. Since then, according to sports marketer Sportcal, pay-TV subscriptions in the region have fallen 21 percent, the direct result of political conflict. Over the same period, subscriptions to direct-to-consumer services have increased by 50 percent, the result of improved broadband infrastructure, growing mobile penetration, and the wider availability of banking and payment cards.

The dominant pay-TV sports provider in the MENA region is Doha-based beIN, which has more than 50 percent of the market and the rights to most top-tier sports events, including the Olympics, the FIFA World Cup, UEFA Champions League, and the big five European football leagues. Smaller pay-TV providers like OSN and Abu Dhabi Media compete for second- and third-tier rights and distinctive audiences. OSN, for example, focuses on the large expat market in the region but took a hit in 2017-18 when beIN bought the live rights to cricket competitions in England, Wales, Australia, and India. In response, OSN has sought younger viewers with World Wrestling Entertainment, Ultimate Fight Championship, MotoGP, Formula E auto racing, and Ginx-TV, an e-sports channel that appeals to the growing gaming community.

Direct-to-consumer sports media are growing in the Middle East, though the industry faces challenges of non-uniform connectivity, latency, and other quality issues, as well as rampant piracy. The streaming service beIN Connect launched in 2014, and in 2017 OSN launched Wavo, a streaming application with several live sports packages. The first true direct-to-consumer services to have entered the market include UK-based Dugout, a consortium of some 70 international football clubs that streams free and exclusive Arabic-language content—game highlights, interviews, and behind-the-scenes features—but no live matches. In 2018, Texas-based FloSports announced a deal with European Professional Club Rugby to provide live coverage of its games in 19 Middle Eastern countries.

In the booming world of e-sports, the Middle East is a major player. While the Middle East represents less than 4 percent of the $109 billion global gaming market, it has the highest growth rate, led by Egypt, Saudi Arabia, and the UAE. E-sports was a demonstration event in the 2018 Asian Games (in which 11 Arab countries competed) and is bidding for inclusion in the Olympics. Independent e-sport associations exist in Egypt, Tunisia, the UAE, and Saudi Arabia.

Sports media in the Middle East have often been caught up in the region's political conflicts, most recently when Saudi Arabia banned beIN Sports —and took away 40 percent of its subscriber base— with the start of the blockade against Qatar in June 2017. At the same time, Egypt's ONTV network decried beIN's "monopoly" in the region and announced the launch, with Saudi financing, of PBS Sports, a collection of 11 free-to-air channels that would complete for beIN's most valuable football rights. Threatened, beIN in September 2017 paid almost three times its existing contract to retain UEFA rights through 2021. In June 2018, in response to complaints from Egypt (one of four Arab teams in that summer's World Cup) and pressure from FIFA, beIN announced that it would broadcast 22 World Cup matches on its two free-to-air channels, including the opening game, quarter- and semi-finals, and final. Without that agreement, the only legal way for fans in the region to watch the tournament would be to pay about US$170 per household.

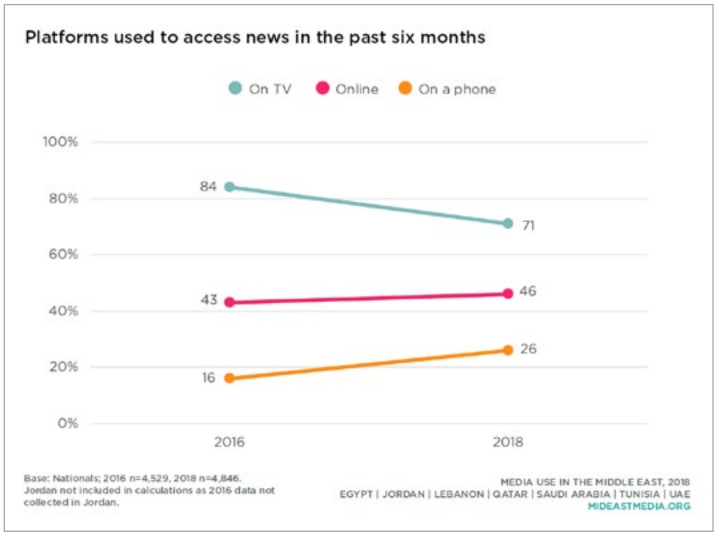
PBS has not materialized, but industrial-scale piracy has. Since Fall 2017, Saudi Arabia-based Arabsat has been decrypting beIN and reselling it as 'beoutQ,' providing both decoder boxes and subscriptions. Unable to take legal action in Saudi Arabia, Qatar urged FIFA to do so, which it finally did in 2018. Other injured rights holders—UEFA, Formula 1, La Liga, and most of professional tennis—also complained. In Fall 2018, Qatar entered a formal complaint against Saudi Arabia at the World Trade Organization, and the BBC and British broadcaster Sky urged the European Commission to take formal action. Both the Saudi government and Arabsat have denied any responsibility for beoutQ, which as of this writing continues to operate. Piracy is no more prevalent in the Middle East than anywhere else, but it is widespread. Digital security company Irdeto reports that about 20 percent of respondents in a 2017 MENA survey admitted to watching pirated live sports, mostly on P2P networks, and a third of respondents did not know piracy was illegal.

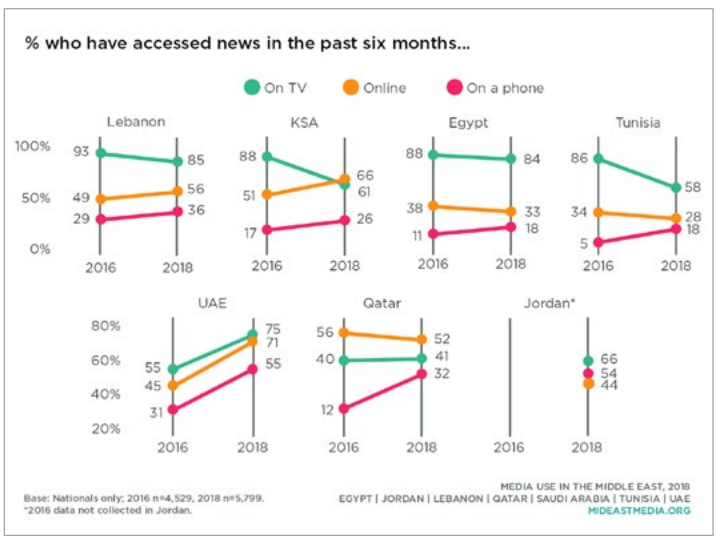
NEWS

In this chapter

- News consumption
- Using social media to get and share news
- Media credibility and independence
- Fake news

News consumption

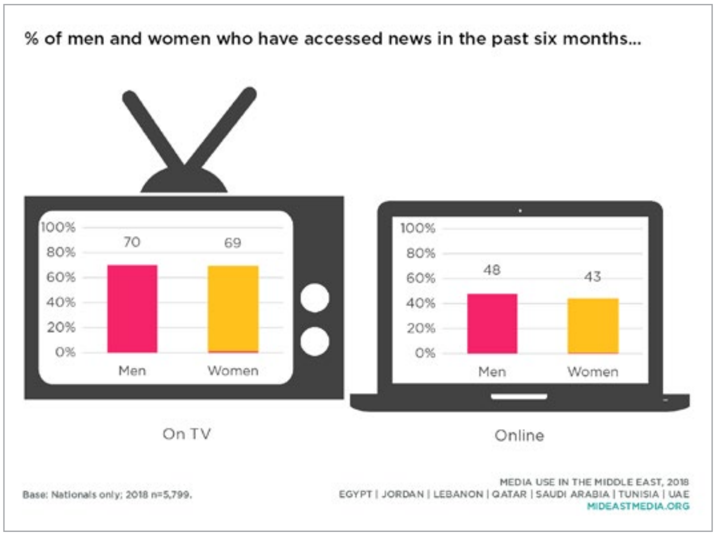




TV remains the most common source for news, but the proportion of nationals who watched news on TV in the past six months declined sharply since 2016, while the proportion who accessed news on a phone increased. In Saudi Arabia and Qatar, more nationals got news online than on TV in the past six months. Phones are increasingly used to access news in all surveyed countries.

Since 2016, accessing news on TV remained stable or dropped in every country, except the UAE, where it rose significantly (along with accessing news online and on a phone). Use rates of online news, on the other hand, increased over the past two years in the UAE, Lebanon, and Saudi Arabia. Use of phones to access news in the previous six months increased in every country from 2016 to 2018—rising to more than half of Emiratis and one-third of each Qataris and Lebanese.

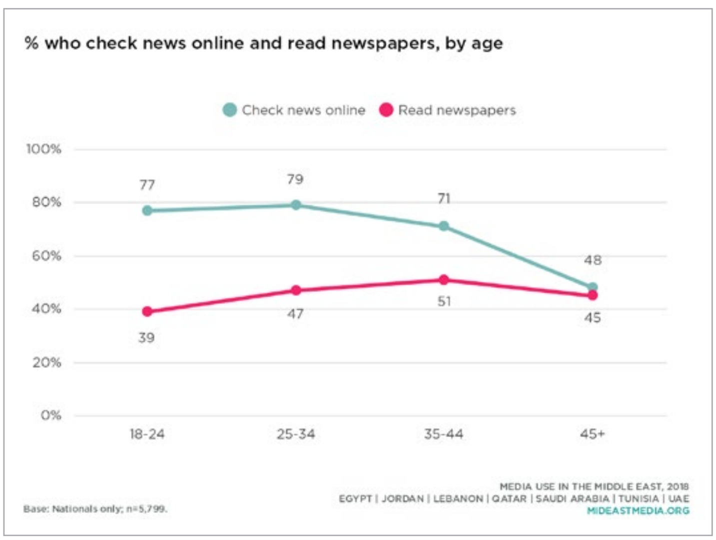
The youngest nationals (18-24 year-olds) are roughly equally likely to have used TV and the internet to access news in the past six months (59% and 52%, respectively), while the oldest nationals (45+ year-olds) are more than twice as likely to have gotten news on TV as online (80% and 29%, respectively). Interestingly, perhaps, there is little difference between age cohorts in the percentage that accessed news on a phone in the past six months (33% 18-24 year-olds, 36% 25-43 year-olds, 31% 35-44 year-olds, 25% 45+ year-olds).

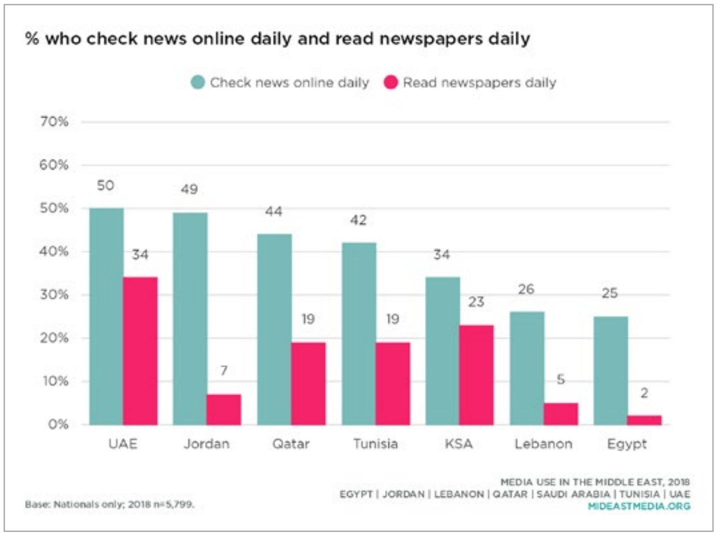


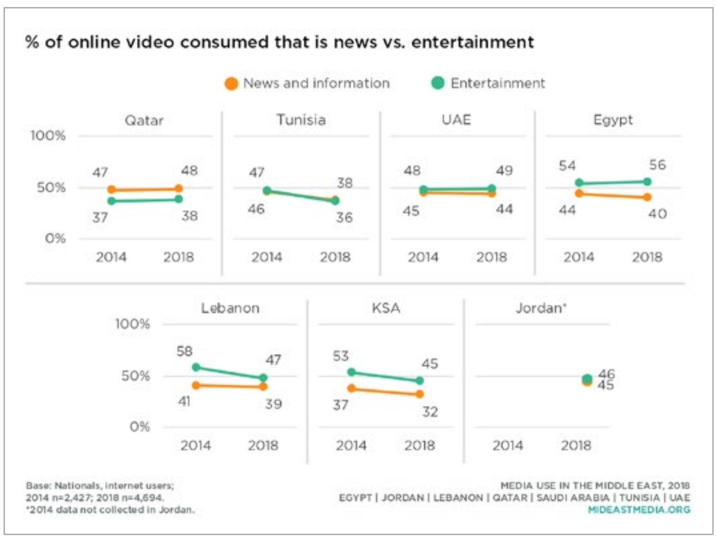
Men and women access news at similar rates both on TV and online; two-thirds of both men and women accessed news on TV, and nearly half of each group accessed news online in the previous six months.

On average, seven in 10 Arab nationals get news online at all, compared to fewer than half who read newspapers.

Nationals under 25 years old report significantly higher rates of checking news online compared to those 45 and older, while the latter read news online and in newspapers at roughly similar rates (read newspapers: 39% 18-24 year-olds vs. 45% 45+ year-olds; check news online 77% 18-24 year-olds vs. 48% 45+ year-olds).







Arab nationals are twice as likely to check news online every day as they are to read a newspaper every day. Daily use of both platforms for news is highest in the UAE and lowest in Egypt and Lebanon. No more than one-third of nationals in any country read newspapers daily.

While seven in 10 Arab nationals get news online, very few paid to access news online in the whole of the previous year, ranging from 5% in Lebanon and Saudi Arabia to only 1% to 2% in Jordan, Qatar, and the UAE. This pattern holds across key demographic groups; no more than 5% of any gender, age, or education group paid for online news in the previous year.

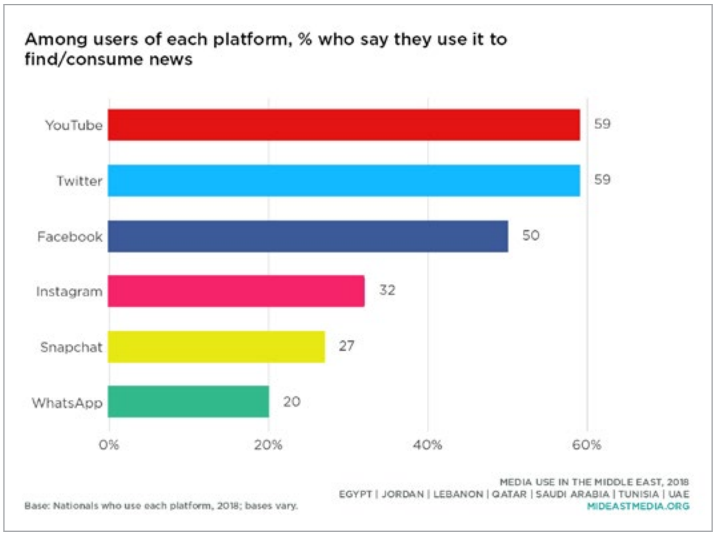
While nationals are turning to the internet more for news, they watch more entertainment video than news video online. Qataris are the only nationals who report watching more news video online than entertainment video, a pattern consistent among Qataris since 2014.

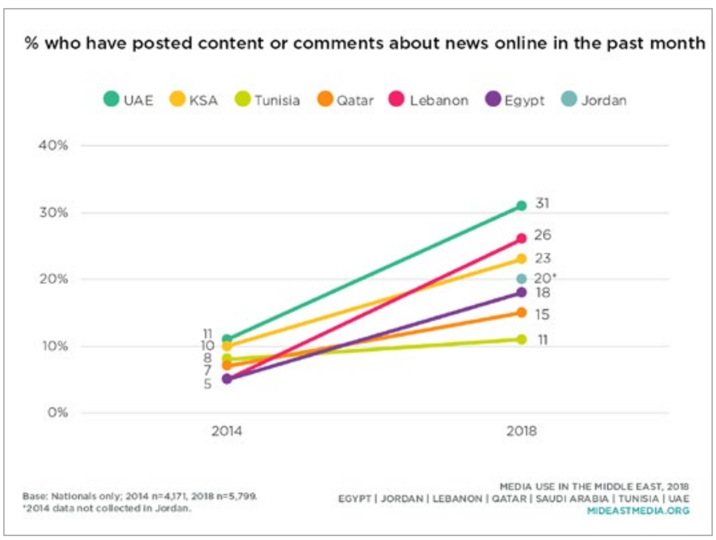
When viewing video content online, younger nationals favor entertainment video, while older nationals favor news video (18-24 year-olds: 52% entertainment vs. 34% news; 25-34 year-olds: 46% entertainment vs. 40% news; 35-44 year-olds: 45% entertainment vs. 44% news; 45+ year-olds: 40% entertainment vs. 46% news).

News remains one of the top three favorite genres of TV and online video behind only comedy. However, fewer nationals cite news as a favorite TV genre than did in 2014 (39% in 2014 vs. 30% in 2018), while news as a favorite online video genre increased in the same time period (14% in 2014 vs. 23% in 2018).

News is more frequently listed as a favorite TV genre among older nationals; nearly half of nationals in the oldest cohort cite news among their favorite TV genres, while one-fifth of the youngest group does (19% 18-24 year-olds, 30% 25-34 year-olds, 36% 35-44 year-olds, 45% 45+ year-olds). Preference for news as a favorite online genre does not differ much across age groups but is still lowest within the youngest age group (19% 18-24 year-olds, 27% 25-34 year-olds, 33% 35-44 year-olds, 24% 45+ year-olds).

Using social media to get and share news



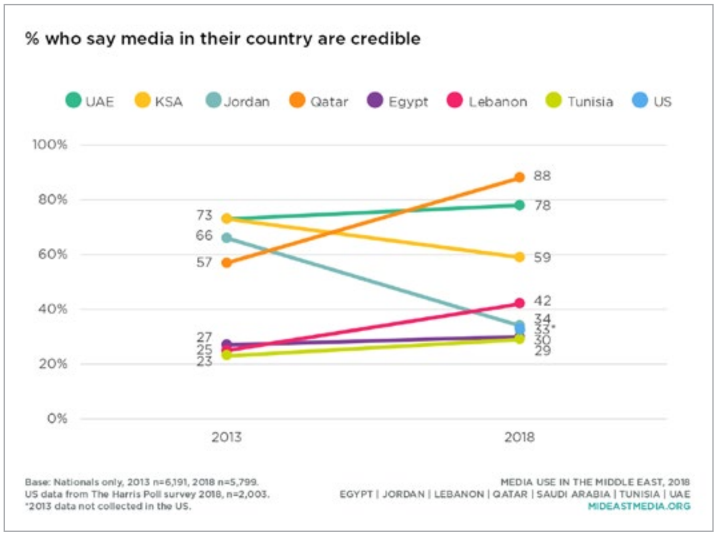


More users of YouTube, Twitter, and Facebook than users of other platforms find and consume news on those platforms. Half or more nationals use each platform to find or consume news. About a quarter or more of nationals also find or consume news through Instagram and Snapchat.

The portion of Arab nationals who have posted online comments about news or news items in the previous month grew in every country since 2014 with the most significant gains in Qatar and the UAE (21 and 20 percentage points, respectively).

Posting online about news varies little by age, and the youngest and oldest groups are the least likely to have posted about news in the past month (17% 18-24 year-olds, 22% 25-34 year-olds, 23% 35-44 year-olds, 17% 45+ year-olds).

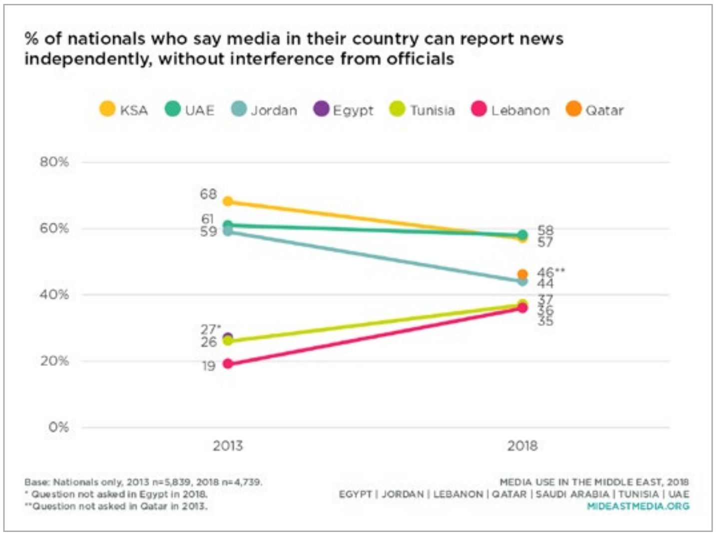
Media credibility and independence

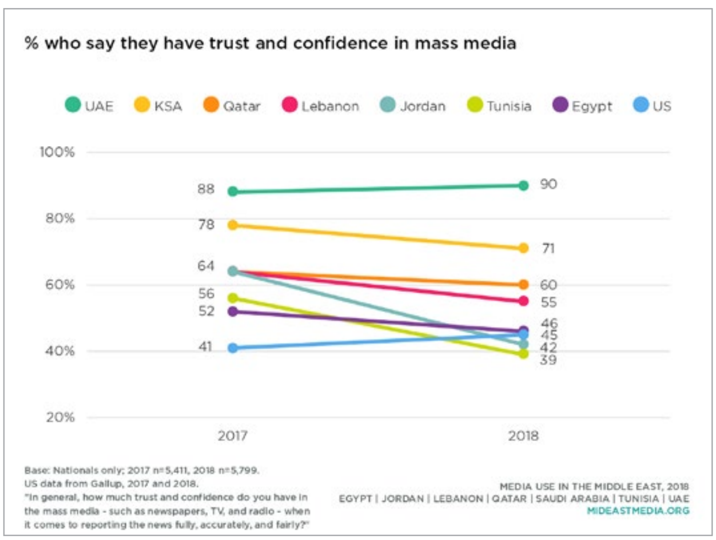


Nationals' perceptions of news media credibility in their country varies widely across nations. Qataris are the most likely to say news media in their country are credible—nearly nine in 10—a 26 percentage point increase between 2017 and 2018. Data in Qatar in 2017 were collected before the Saudi-led blockade of the country began, and it could be that following the blockade, in 2018 at least, some Qataris felt either inclined or compelled to express support for the country's news organizations. Far fewer Jordanians in 2018, though, say their news media are credible than said so in 2013, a 32 point decrease in that period.

Similar to previous years, a large majority of Emiratis say news media in their country are credible, while far fewer Egyptians, Jordanians, and Tunisians than other nationals see their country's news media as credible. One-third of Americans say news media in the U.S. are credible, similar to the shares of Jordanians, Egyptians, and Tunisians who say the same though well below Qataris, Emiratis, and Saudis.

More nationals with at least a high school education say news media in their country are credible than do less-educated nationals (36% primary or less, 40% intermediate, 43% secondary, 44% university or higher). Additionally, those who say their country is heading in the right direction are much more likely to view their country's news media as credible than those who say the country is off on the wrong track (65% vs. 35%, respectively).



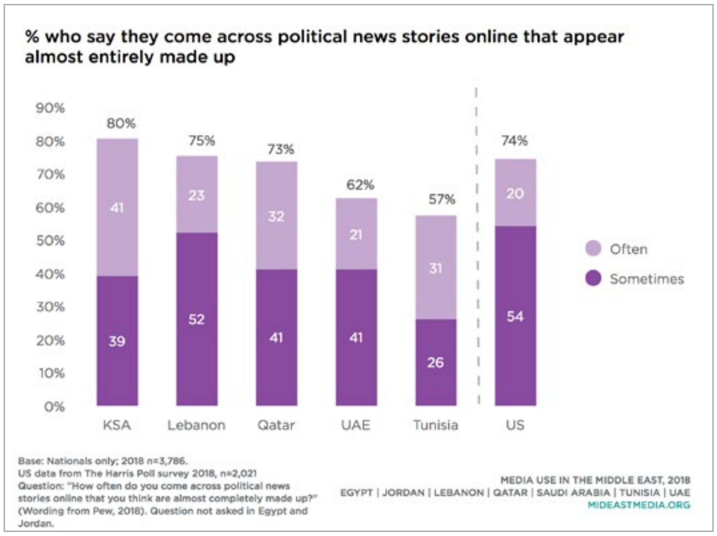


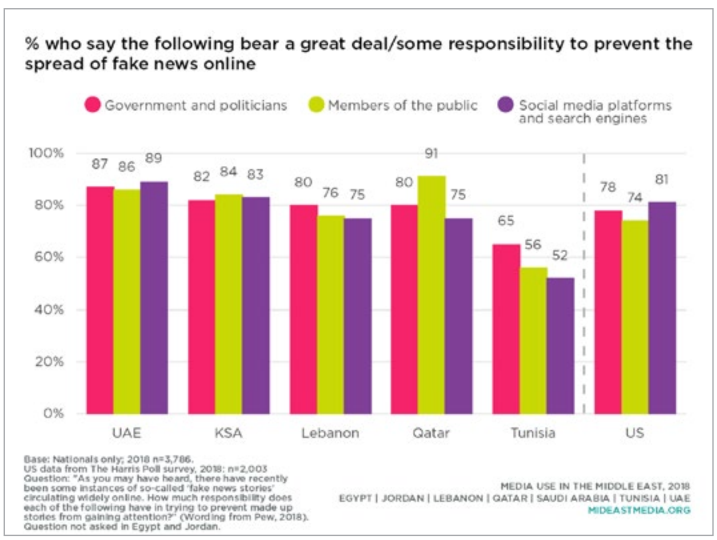
There is less variance among nationals about whether or not news media in their country can report news independently without interference from officials than there is regarding overall news media credibility. Most Saudis and Emiratis say media in their country enjoy this kind of independence (despite a decline for this figure in Saudi Arabia since 2013). Yet fewer Lebanese and Tunisians say media in their country can report without official interference. Nearly half of Qataris say news media in their country can report news without interference from officials.

Trust in mass media to report the news fully, accurately, and fairly—the decades-old Gallup polling item replicated in this study—declined in the past year in every country except the UAE where rates of trust in media are, and remain, the highest in the region. Trust in mass media in most Arab countries in this study is falling; somewhat to the contrary, from 2017 to 2018 the share of Americans who trust mass media increased modestly, from 41% to 45%.

Trust in the mass media is more common among self-described cultural conservatives than progressives (57% vs. 43%, respectively) and is more common among nationals who say their country is moving in the right direction compared to those who say it is off on the wrong track (76% vs. 41%, respectively).

Fake news





More than half of Arab nationals in all countries surveyed say they come across political news stories online they think are almost completely fake (either sometimes or often). Three-quarters of Qataris, Lebanese, and Saudis say they come across patently false news items sometimes or often—similar to the percentage of U.S. nationals who say the same.

The share of respondents who say some political news items they see online are fake increases with education, but majorities of nationals across all education levels say they come across fabricated news online sometimes or often (56% primary or less, 69% intermediate, 70% secondary, 73% university or higher). Cultural conservatives are somewhat more likely than progressives to say they have come across completely made up political news stories online (73% vs. 66%, respectively).

Similar and significant majorities of Arab nationals in all countries under study say preventing fake news from gaining attention online is at least partly the responsibility of government, the public, or social networking sites. Americans agree, but slightly more Americans say social media platforms and government, as opposed to the public, bear responsibility for stopping the spread of fake news. Questions about fake news were not permitted by officials in Egypt or Jordan.

A HYBRID, INTERDEPENDENT, AND POLITICAL LANDSCAPE: THE NEWS IS BAD, BUT STILL IMPORTANT

Commentary by Fatima el Issawi
University of Essex

Arab audiences don't have to choose between platforms to access information. They enjoy a panoply of choices, and they are making use of them in a relational, interdependent, yet competitive manner. The findings of the new Media Use in the Middle East survey confirm the hybridity of these practices while reflecting a landscape in tune with international trends. While television remains the main provider of news for Arab audiences, with very high rates of consumption, there is a steady consolidation of the habits of accessing news online. Meanwhile, the phone is confirming its role as a practical, personal, and cozy tool to get informed, across all ages.

These findings corroborate Andrew Chadwick's (2013) seminal analysis on the hybrid media system, where political communication is relational by nature and power is understood, "as the use of resources of varying kinds that in any given context of dependence and interdependence to enable individuals or collectivities to pursue their values and interests, both with and within different but interrelated media" (p. 207). In a departure from the excessive focus on social media uses and its effects on the Arab public sphere within the context of Arab uprisings, this survey's findings reflect a mitigated landscape where audiences construct their world by simultaneously using different platforms to get informed, to check information, and to either negotiate, accept, or reject it. In this new hybrid media ecology, the wide diversity of media use, as shown in the survey's findings, confirms international trends towards, "a balance between the older logics of transmission and reception and the newer logics of circulation, recirculation and negotiation" (Chadwick, 2013, p. 208). While access to news through social media and the phone is growing steadily simultaneously with the decline of newspapers' readership and radio's audiences, the survey does not give indications on the original source of the news accessed through new media platforms: is this a circulation or re-circulation of press articles, op-eds, or other news material produced by the legacy media, thus re-confirming the continuous prominent role of traditional media as the main provider of information?

The Arab public sphere, as demonstrated by this survey, is dynamic and diverse, departing from expectations of a rather dormant or fearful sphere as a result of the raging counter-revolutions in the region, accompanied by vicious pressures and limitations used to suppress dissent. While media consumption rates are high, one can notice a complex relationship of love-hate between audiences and their national media, thus confirming the intricate link between media and politics and defying the analysis that sees traditional media as a simple tool for politics in hybrid-authoritarian contexts.

It is not a surprise to see the lowest rates of trust in media in Tunisia, a country that represents a successful yet very fragile model of democratic consolidation while scoring high in recent international rankings (69 in Freedom House ranking of freedoms in the world for the year 2019, the only Arab state ranked as free) along with a slight increase in the belief in media's independence. A similar landscape can be seen in Lebanon and Jordan where, like in Tunisia, the public debate is open to a certain extent while increasingly suffering new repressions. The public attitude of suspicion towards national media in countries where levels of media freedoms are higher attests to an awareness of the political influence of media and a willingness by the civil society to monitor its activities without going to the extent of rejecting it or denying its important role. On the contrary, a remarkably high rate of trust and confidence in national media's independence is observed in most Gulf countries where the public debate is much more restricted.

This trusting attitude can be explained by the rise of nationalism in politics and media amid a tough diplomatic crisis, unprecedented in the history of the Gulf region, in which national media played a major role as a platform for political communication, fully engaged in the battle of conflicting narratives. It is quite significant to see that most Saudis and Emiratis surveyed believe their national media enjoy independence from political interference, while national media in the two countries were seriously engaged in spreading misinformation on the brutal killing of Saudi critical journalist Jamal Khashoggi.

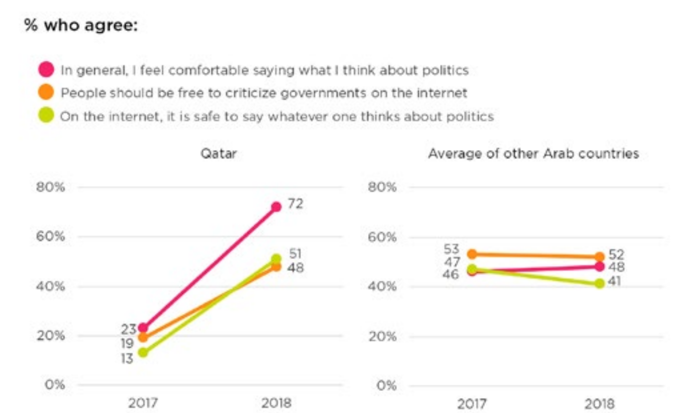
News is bad, but this did not stop the public from actively seeking to be informed or commenting on news online—for instance, a balanced interest in news and entertainment is seen in Tunisia and Jordan while the imbalance in favor of entertainment remains noticeable in Egypt but without deterring the public from following the news. Countering expectations for a decline in the Arab public's appetite for debates within an international climate of mistrust in news, widespread misinformation, and an unprecedented level of suppression of dissent amid growing nationalistic trends, patterns of media consumption as shown in this survey remain deeply political.

FOCUS ON QATAR

In this chapter

- Censorship, regulation, and freedom of speech
- Cultural attitudes
- Use of media for entertainment
- News consumption

Censorship, regulation, and freedom of speech

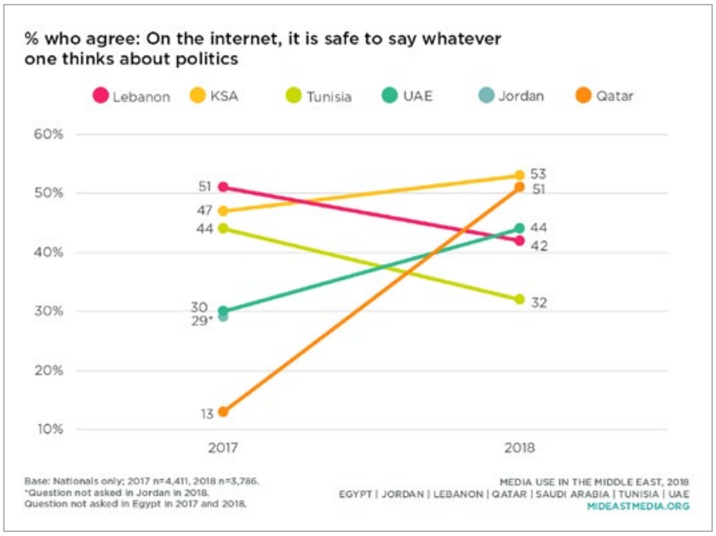


Base: Nationals only, 2017 n=3,367, 2018 n=3,786. Egypt and Jordan not included in calculations as these questions were not asked in Egypt and Jordan in 2017 and/or 2018.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

Most Qataris—nearly nine in 10—say news media in their country are credible. This represents a 26 percentage point increase in perceived credibility in just one year and is well above the average of nationals from other countries (Qatar: 62% in 2017 vs. 88% in 2018; all other nations: 39% in 2018). Only a minority of Qataris, however, say news media can report news in Qatar without interference from officials.

At the same time, more Qataris also say they feel comfortable speaking out about politics. In 2018, about four times as many Qataris say it is safe for people to discuss politics online as said so in 2017. Qataris are now far more likely than nationals from other Arab countries to say they feel comfortable expressing their views about politics. Additionally, about half of Qataris say people should be free to criticize governments on the internet, which is twice the rate observed for Qatari nationals in 2017.



Far fewer Qataris than other Arab nationals are worried about governments or companies checking what they do online. Only 16% of Qataris express concerns about either type of surveillance—half to a third of the rates of nationals in other countries (worry about governments checking what I do online: 30% Tunisia, 44% Lebanon, 47% UAE, 58% KSA, question not asked in Egypt or Jordan; worry about companies checking what I do online: 29% Tunisia, 41% Jordan, 47% Lebanon, 50% Egypt, 61% UAE, 62% KSA).

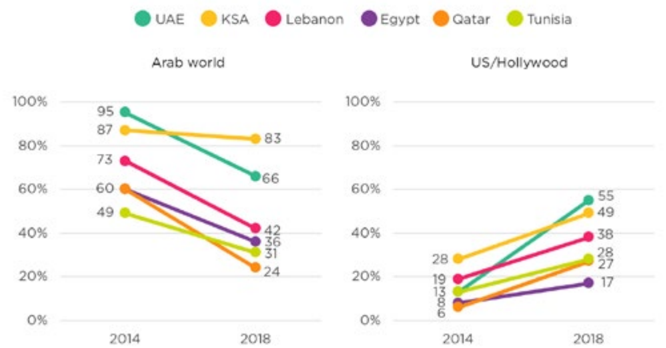
Additionally, fewer than half of Qataris and Tunisians want more internet regulation in their country, much lower than the rates in other countries (45% Qatar and 43% Tunisia vs. 60% KSA, 62% Egypt, 66% UAE, 84% Lebanon; question not asked in Jordan).

Qataris and Egyptians, though, more than other nationals, support censorship of entertainment content. Most Qataris say deleting scenes from films or TV programs is appropriate if some people find them offensive (84% Qatar, 89% Egypt vs. 78% KSA, 75% Jordan, 75% UAE, 65% Lebanon, 45% Tunisia), and a majority also says that government oversight helps production of quality entertainment (84% Qatar, 83% UAE, 76% Egypt, 74% KSA, 67% Lebanon, 35% Tunisia, question not asked in Jordan).

Compared to 2016, however, Qataris are more evenly divided concerning who is responsible for blocking or avoiding objectionable content. The percentage of Qataris who think it is mostly the responsibility of government to block objectionable content, rather than mostly the individual's responsibility to avoid such content, dropped by 8 percentage points since 2016, while those who think the individual bears primary responsibility rose by 13 points (2016: 54% government's responsibility, 40% individual's responsibility; 2018: 46% government's responsibility, 53% individual's responsibility).

Cultural attitudes

% of nationals who think entertainment content from the Arab world and US is good for morality



Base: Nationals only, 2014 n=4,171; 2018 n=4,846.
Question not asked in Jordan in 2018.
2014 data not collected in Jordan.

MEDIA USE IN THE MIDDLE EAST, 2018
EGYPT | JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE
MIDEASTMEDIA.ORG

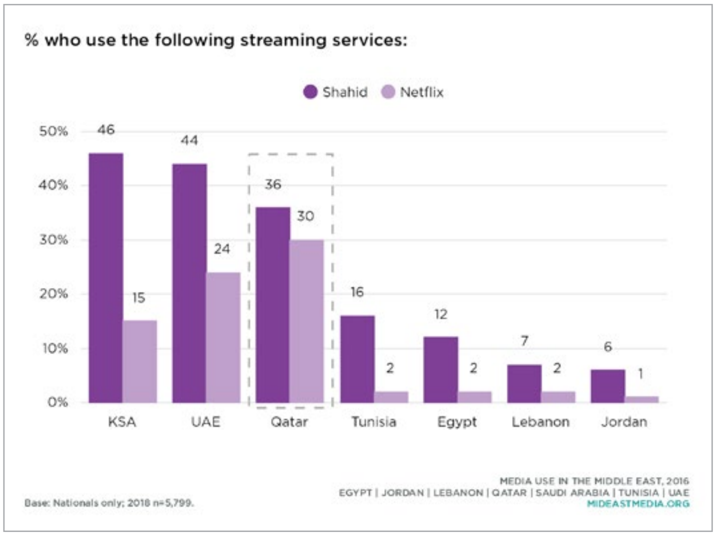
Qataris reported changing attitudes about culture between 2016 and 2018. Fewer Qataris now than in 2016 say more should be done to preserve cultural traditions—62%, down from 81%. While most Qataris say their culture should do more to integrate with modern society, that figure nonetheless dropped from 79% to 65% between 2016 and 2018.

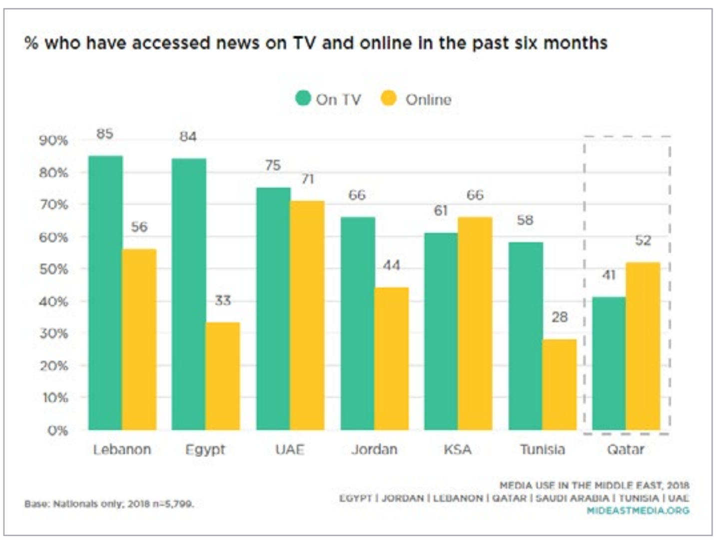
That said, most Qataris have consistently said that more entertainment should be based on their culture and history (83% in 2014, 80% in 2016, 82% in 2018), larger percentages than those among other Arab nationals—though a sentiment that is shared by Egyptians (83% in 2018).

Perhaps as a show of national pride, Qataris are significantly more likely than in 2017 to say films and TV programs from their country are good for morality—a 22 percentage point increase—while at the same time they are less likely to say films and TV content from the Arab world in general are good for morality—10 points less than 2017. Qataris and Tunisians are the only nationals who were less likely in 2018 than 2017 to say Arab world films are good for morality and to put the Arab world and Hollywood/US films and TV programming at parity with regard to morality.

The month of Ramadan is a time when some daily schedules and behaviors in Muslim countries change, and this is also the case in Qatar. Many Qataris say that during Ramadan they spend more time consuming religious media and more time consuming entertainment content with family (do more during Ramadan: 81% consume religious content, 61% consume entertainment with family). This appears to come at the expense of other activities, most of which Qataris do less of during Ramadan (do less during Ramadan: 74% listen to music offline, 73% listen to music online, 73% watch films on TV, 73% watch films online, 70% watch films at the cinema).

Use of media for entertainment

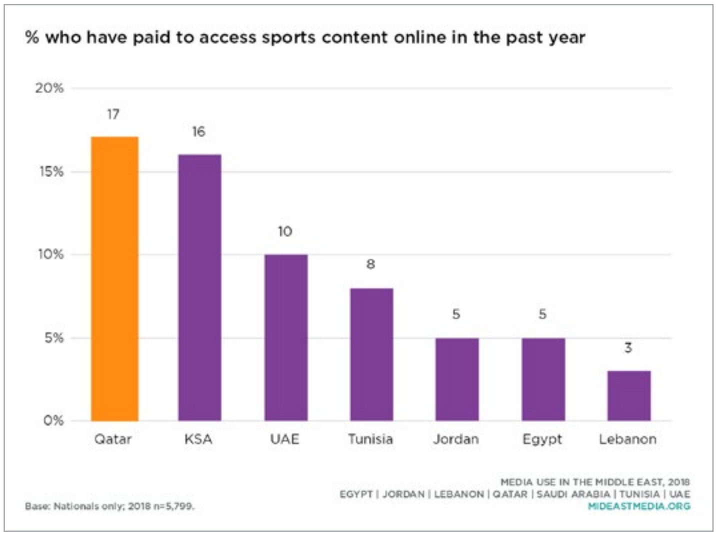


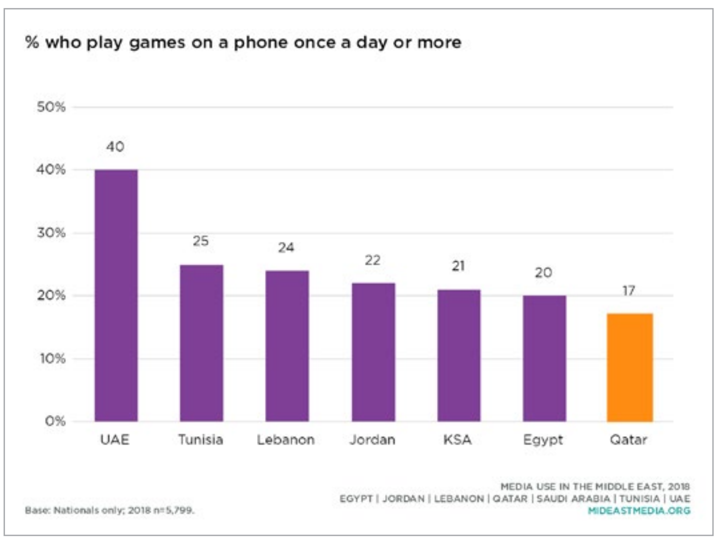


The proportion of Qataris who use the internet grew from eight in 10 in 2014 to nearly everyone in 2018 (78% vs. 99%, respectively). This is consistent with internet use in other Arab Gulf countries under study, though multiple middle-income countries studied also have internet penetration above 85%.

Online streaming is common in Qatar as well as in Saudi Arabia and the UAE. However, both Netflix and Shahid are used by nearly equivalent numbers of Qataris, whereas Shahid holds a significant advantage over Netflix in other countries studied.

At least half of Qataris accessed news, music, and films online in the past six months, and the increase for music and films since 2016 was sharp (music: 33% in 2016 vs. 58% in 2018; films: 38% vs. 58%; news: 56% vs. 52%). One-third of Qataris have watched TV programs online in the past six months, double the rate in 2016 (14% in 2016 vs. 33% in 2018). Qataris and Saudis are the only nationals who were more likely to have accessed news online than on TV in the previous six months.

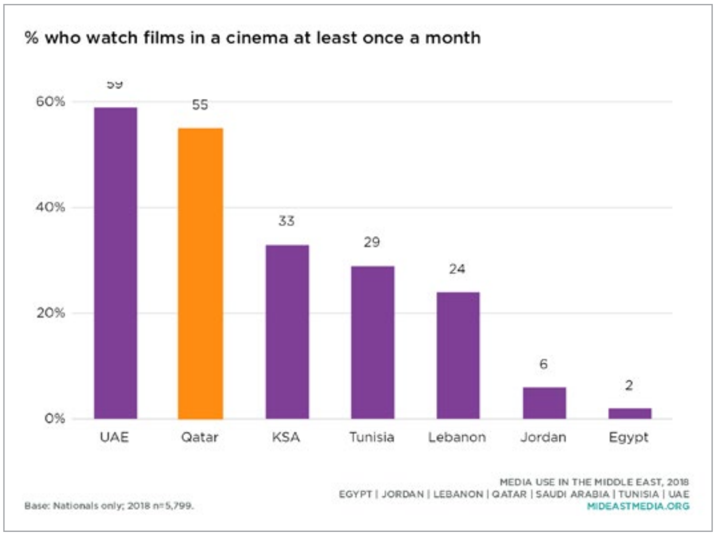


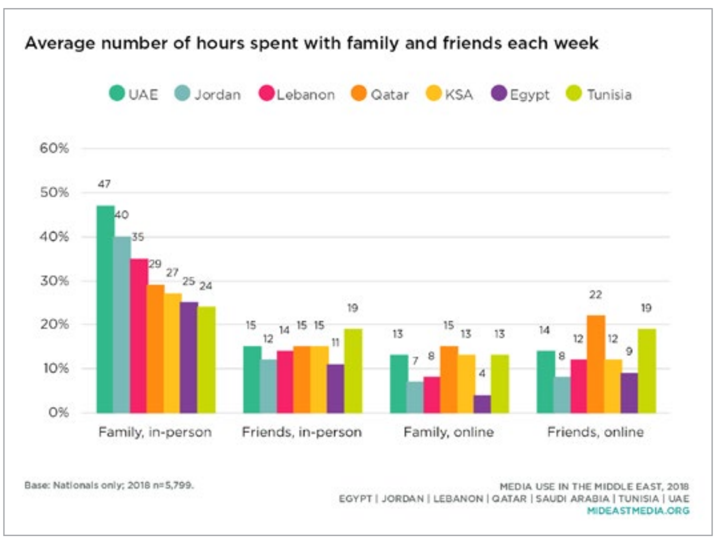


Qataris and Saudis are also the nationals most likely to have paid for online sports content in the past year—double or more the rates in UAE, Tunisia, Jordan, Egypt, and Lebanon—though the share that paid for sports in either country did not exceed 17%.

Just one-quarter of Qataris watch TV programs once a day or more—a lower rate than in any other country (26% Qatar vs. 43% Jordan, 43% Lebanon, 49% UAE, 58% Tunisia, 61% Egypt, 63% KSA). Qataris also are the nationals least likely to play games on a phone at least once a day. Less TV viewing and game playing among Qataris may help explain the at-times higher news consumption among that population or the comparably larger amounts of time Qataris spend communicating with friends and family online and in person.

A firm majority of Qataris say they exercise or play sports at least once a week—almost six in 10—a figure that is higher only for Emiratis (58% Qatar, 69% UAE, 45% KSA, 37% Tunisia, 32% Lebanon, 24% Jordan, 9% Egypt).

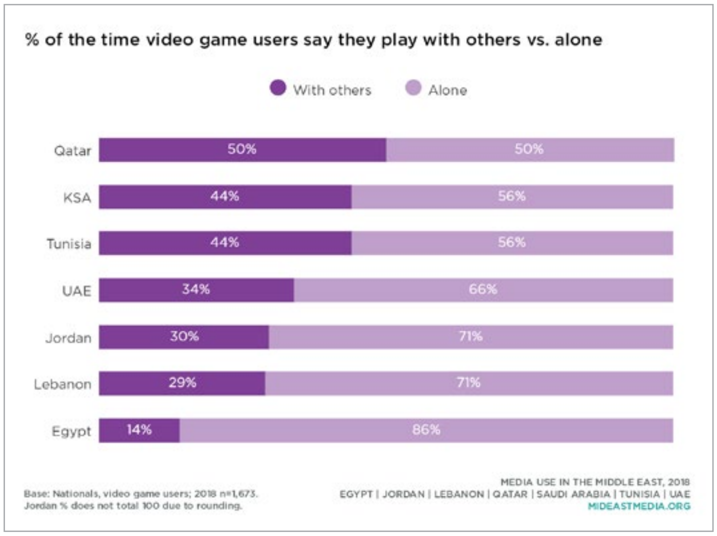




Well over half of Qataris (as well as Emiratis) say they go to the cinema at least once a month, a much higher rate than that among nationals in other countries, one-third or fewer of whom go to the cinema with the same frequency.

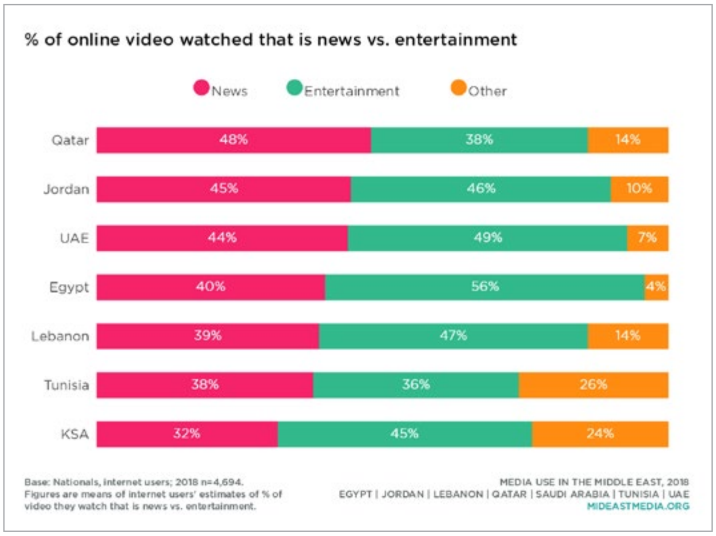
Unlike other Arab nationals, most of whom watch films from their own country, Qataris and Jordanians are twice as likely to watch films from other Arab countries as from their own country (own country: 26% Qatar, 25% Jordan vs. 51% Tunisia, 55% UAE, 68% KSA, 70% Lebanon, 96% Egypt; other Arab countries: 55% Qatar, 66% KSA, 66% UAE, 64% Lebanon, 49% Jordan, 31% Tunisia, 14% Egypt). Qataris are, however, increasingly likely to watch films in Arabic (68% in 2014 vs. 82% in 2018).

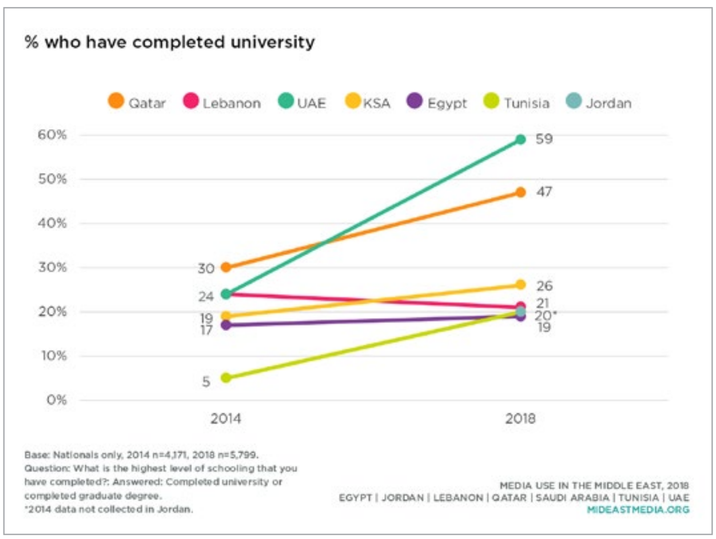
Qataris spend significant time each week with family and friends both online and in person: 29 hours each week in person and 15 hours a week online with family. Qataris also spend an average of 15 hours in person with friends each week and 22 hours online with friends. No other nationals in the countries studied spend more time online with family or friends.



About four in 10 Qataris play video games, more than Egyptians, Jordanians, and Lebanese, but less than Saudis and Emiratis (43% Qatar, 72% KSA, 62% UAE, 42% Tunisia, 35% Lebanon, 21% Jordan, 19% Egypt). Among those who play video games, Qataris are equally like to play with others as alone, while other nationals spend more of their gaming time playing alone.

News consumption



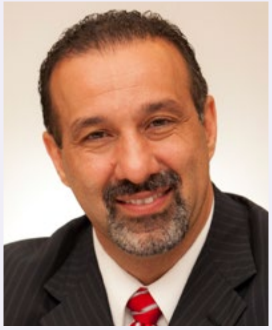


Qataris estimate that more of the online video they consume is news rather than entertainment (48% news/information, 38% entertainment), and they are the only nationals who so estimate that a plurality of the online video they consume is news.

Qataris, along with Jordanians, are more likely than other Arab nationals to identify news as a favorite genre of both TV and online video (news is a top three favorite TV genre: 42% Qatar, 44% Jordan vs. 32% Egypt, 30% Tunisia, 29% UAE, 27% Lebanon, 25% KSA; top three favorite online genre: 30% Qatar, 36% Jordan vs. 31% UAE, 27% KSA, 24% Egypt, 21% Lebanon, 19% Tunisia).

While seven in 10 Arab nationals surveyed check news online at all, the rate in Qatar is much higher, nine in 10, similar to rates in Saudi Arabia and the UAE and much higher than in Lebanon, Jordan, Tunisia, and Egypt (90% Qatar, 95% UAE, 85% KSA, 72% Lebanon, 70% Jordan, 66% Tunisia, 45% Egypt).

Qataris, along with Emiratis, lead countries surveyed in the percentage of the population that has earned a college degree, and significantly more Qataris now than in 2014 say they finished a four-year degree program. The figure for Qataris is second to Emiratis, but close to or more than double the rates for other nationals.



QATARI FREEDOM OF EXPRESSION RISING; SURVEILLANCE CONCERN FALLS

Commentary by Mehran Kamrava
Georgetown University in Qatar

Close to two years after the eruption of what is commonly referred to in Qatar as "the crisis" with its three neighbors, Saudi Arabia, Bahrain, and the UAE, along with Egypt, the consequences of the diplomatic dispute are clearly reflected in this and other similar public opinion surveys. In particular, Qatari attitudes about two politically salient issues—freedom of expression and the health of Qatari culture—appear to be profoundly impacted by the diplomatic and geopolitical predicament in which the country has found itself since June 2017, when the quartet broke off diplomatic relations with Qatar, accused it of sponsoring terrorism and interfering in their domestic affairs, and imposed sanctions on trade and other exchanges with the country. In the ensuing months, the political animosity between the parties involved has only become more intense and in-depth. Not surprisingly, there have been significant changes in Qatari politics as a result, and, more consequentially, to Qataris' relationship with their political leaders and their assumptions about state policies.

Popular assumptions about censorship and the scope of permissible expression are especially revealing in this regard. Most notably, there has been a significant rise in Qatari perceptions of freedom of speech and a commensurate decrease of concern about online surveillance. An astounding percentage of Qataris—88 percent—believe that the news media in their country is credible. This is despite the fact that a significant majority of the country's expatriate population, 61 percent, continues to remain skeptical about the veracity of the news they hear.

Interestingly, whereas in other Arab countries people feel generally less secure to criticize the government or to say whatever is on their mind online, significantly more Qataris felt free to express their political views in 2018 as compared to 2017 (72% in 2018 as opposed to 23% in 2017). Equally telling is the fact that four times as many Qataris feel it is safe to express political views online as was the case in 2017. Similarly, there has been a steady increase in Qataris' perceptions of openness and freedom of expression. In fact, at only 16% in 2018, far fewer Qataris worry about online surveillance by the government or by companies than in any of the other countries in the survey.

In the absence of discernible changes to state policy regarding online surveillance and permissible political expression, this indicates an increasing narrowing of the state-society gap, especially insofar as Qatari political culture is concerned. Especially in comparison to other political leaders in the region, and from among the ruling families, the Al-Thanis have always enjoyed greater popularity among their subjects. Since 2017, however, Qataris feel particularly closer to their political leaders, seeing the state in general and the person of Sheikh Tamim in particular as responsible for carefully navigating Qatar out of what could well have been crushing sanctions by bigger and more powerful neighbors.

Similar changes appear to be occurring in the cultural arena, whereby fewer Qataris as compared to the past worry about preserving cultural traditions (62% in 2018 compared to 81% in 2016). In a small state where the national population comprises around only 12% of the total, assumptions about threats to culture and identity are often rooted in fears of being overwhelmed by foreign expatriates in one's own country. Since 2017, however, many non-Qataris living in the country have been vocal in their loyalty to and solidarity with the country, therefore narrowing some of the social and cultural chasms that have always existed between the national and non-national populations.

This is not to imply that Qataris have lost interest in their own culture and history. Since 2014, in fact, more than 80 percent of Qataris have consistently believed that more of the entertainment they consume should be based on Qatari culture and history (82% in 2018). Only Egyptians and Emiratis are similarly concerned about cultural preservation through entertainment.

Perceptions of freedom of expression and lack of online surveillance do not necessarily translate to support for unrestricted expression in the entertainment field. In line with many others in the survey, an overwhelming majority of Qataris, 84 percent, support the censorship of entertainment content and the deletion of objectionable scenes and content from films or TV programs. Slightly more than half of Qataris believe it is the responsibility of individuals instead of the government to regulate entertainment content.

The June 2017 diplomatic dispute between Qatar and its neighbors has clearly had multiple consequences for political and social life in Qatar, as well as for the country's economy. In the economic realm, Qatari policymakers made up for their overnight loss of the country's overwhelming reliance on imports from the UAE's Jebel Ali port by quickly reestablishing alternative suppliers and supply chains for essential goods and exports. By any standard, what Qatar has accomplished economically has been impressive.

But perhaps even more noteworthy, and most likely longer lasting, have been developments in Qatari politics and culture. Qatari nationals have long had a relatively harmonious relationship with their rulers, with most of the political turmoil the country has witnessed having been confined to struggles for power and influence within the ruling family. But, as the data presented here clearly indicates, that relatively harmonious relationship has assumed new dimensions, with deeper levels of popular trust toward the state and greater feelings of freedom of expression. How long these sentiments will last, if and when Qatar's dispute with its neighbors is settled, and in what direction assumptions about politics and culture are likely to develop in the post-dispute era, are questions that only time can answer.

CONCLUSION

Longitudinal studies are all about navigating change, distinguishing between and among trends supported by evidence while accounting for ephemeral fluctuations in the environment. This can be a daunting challenge, but this is our objective in conducting the Media Use in the Middle East studies—to look carefully at individual data and then connect them with the larger canvas to discern meaning as we cope with the complexity of survey research across seven countries. We began these explorations into public opinion at a time when much of the region experienced a mood of euphoria during the Arab uprisings early in the second decade of the 21st Century. We were eager to watch the currents of people's media behavior during that turbulent period and beyond.

As we have focused on media use, we recognize that media are part of a larger narrative given their connection to and influence on other institutions and interests. Longitudinal studies require continuity, rigor, and considerable resources. Our experience to date suggests that this enterprise continues to generate useful and discerning findings, thus affirming our commitment. We at NU-Q are ideally situated to do this work. In a region that was once media-poor and behind the development of some other locales, we have witnessed great change even in countries where there was limited communications infrastructure development alongside others that are quite advanced. Now several countries in the Arab region exceed many Western countries and others in the global community in internet penetration and adoption of mobile devices. Some nations have leapfrogged technologies, moving from old-style legacy media to modern digital platforms with considerable dispatch. Longitudinal studies are one of the best ways to observe and chart this change, and thus our decision to engage this research over the past six years, has been gratifying for us and, we hope, useful for others.

As we consider the findings of this 2018 study, with its focus on entertainment media, the interplay between modernity and tradition is visible. The capacity of people to create their own media and media content is an essential element in understanding the modulations of shifting attitudes and opinions. While people in the region venerate homegrown entertainment content, especially films that harken to historical themes, they also want their own cultures to integrate into modern society. This continued tension between preserving the past and honoring traditional values, on one hand, and the reality of the region's role in geopolitics and the global economy on the other is also reflected in attitudes about media and media fare.

In the new findings, we still see support for censorship of entertainment content, although there is evidence of some softening. In most countries in the region, there is support for banning films if some people find them offensive, a de facto vote of confidence for censorship even as support for freedom is evident in other findings. Majorities in four countries, for example, agree that people should be able to express their ideas and opinions online, even if they are unpopular. There are mixed views about online surveillance, with concern about commercial intrusions trumping those of government by small percentages. There is a belief among half of respondents that entertainment media challenge rather than strengthen cultural stereotypes. In our earlier studies, respondents were preoccupied with the role of media in communicating sexual behavior and excessive violence versus family values, respect for tradition, and the like. And while these points of conflict have not gone away, the notion that entertainment from the Arab region is good for morality—and that films and TV from the West are now seen as less damaging to morality and moral standards—perhaps reflect more sophisticated exposure to both local and western media. There are, after all, subtle, quiet, and diverse messages found in virtually all media content. The clear preference for films and other entertainment fare in Arabic, as opposed to other languages, still exists, but so does evidence that an increasing number of people say some of their favorite TV shows are in another language, often English or French. Many viewing patterns observed in other countries, such as on-demand viewing and binge-watching, are also common in the Arab region.

The link between programming and other content preferences in the abstract and real-time and stored access is greatly enhanced by technology, from high-speed internet to smartphone and VPN use. Whether in viewing entertainment media or news, there was more support in some countries in 2018 than in previous years for online freedom of expression at a time when smartphone use and that of other new digital devices is increasing. Notably, smartphone ownership in Qatar and UAE (nearly 100%) exceeds that of the United States (77%). Concurrently, VPNs (virtual private network) have seen explosive adoption across several countries in the region, most steeply in Arab Gulf states. Its importance is seen by dint of increasing access to diverse content offerings, notably in film, TV, movies, and sport fare and also by rising concerns about internet privacy.

Social media platforms are again in play, with large declines for Facebook and Twitter amid migration of respondents to other platforms and activities, though these major players are still important in most countries. Use of Instagram and Snapchat has risen in Arab countries in the years that Facebook and other legacy platforms have declined, though the most recent data suggest those services may be plateauing in penetration, too. More nationals in 2018 than in prior years also report doing things online that do not require social platforms necessarily, such as video gaming and binge-watching and even report greater frequencies of typically offline activities like going to the cinema and playing sports. Social media's importance, however, has not diminished and for many continues to play a role in everyday life, school, work, and play. Even the traditional majlis or gathering place where Arabs practice the fine art of interpersonal communication has been invaded by social media, thus expanding the role and function of that venerable means of communication.

Across the media landscape, film viewing has increased, especially in Saudi Arabia where cinemas were only recently reintroduced to the public. It can be argued that it was social media pressure that gave voice to Saudis who hungered for cinema. The same might be said of other Saudi reforms such as women driving cars, which was also advanced in part by social media. At the same time, TV viewing is down while music use is up, as is time spent with video games. Enjoyment of sport is on the rise both for attending live matches as well as watching on TV or on digital devices. As cities in the region become major venues for international and regional sport competition, the growth of sport content is likely to increase exponentially. Mega-events like the Asian Games, the IAAF World Championship, and the World Cup, as well as world-class tennis, golf, and other sports provide sport content. We see modest increases in audiences' willingness to pay for this and other content, an indicator of growth and further development.

While overall media use is up across several platforms and internet penetration approaches saturation in most Arab countries, there is greater and greater diversity of available content. As in other locales, trust in mass media in the Arab region is down—and alarmingly so in some countries including Jordan and Tunisia (now 42% and 39%) where it has dropped below of that in the U.S. (45%), where media are embroiled in constant battle with the Trump Administration. These figures, lower in 2018 than 2013, are likely related at least partly to concerns about fake news, as three-fourths or more of nationals in some countries say they encounter news reports that they believe are made up, either sometimes or often. This is not just a casual observation, but rather one that has considerable currency due to information wars in the Arab Gulf, where content farms and bots are known to generate fabricated reports as part of disinformation campaigns.

Fake news concerns have been heightened by the blockade of Qatar where false reports, coming from several Arab countries, but notably Saudi Arabia and the UAE, abound. In February 2019, for example, when Qatar won the Asian Cup, defeating the UAE in semi-finals and Japan in the final, several UAE newspapers reported that Japan had lost, but neglected to say who won. This is less likely a failure of journalism per se than an example of self-censorship driven by fear of government reprisal. Such selective news reporting is not unrelated to cybercrime laws common in the Arab Gulf that forbid either positive reports about a perceived enemy or negative reports about one's own state.

Distortion of fact-based journalism is a worrisome trend and is likely to continue to erode trust in media. Along with attacks on media by national leaders, whether in Turkey, Saudi Arabia, UAE, the U.S. or elsewhere, scathing criticism of the news media as "the enemy of the people" is likely influencing public perceptions of media.

As this study confirms, media development in the Middle East continues, and so does audience engagement with an understanding of media and communication. The nexus between government and the private sector seen vividly in regulation and censorship is always worth watching closely—and is always in play. Media use studies like this one are ultimately about freedom of expression and the utility of communication infrastructure to facilitate individual use of media platforms and content as well as their spread to interpersonal, group and strategic communication, and messages that extend to larger audiences across the region and globally.

This study, like those in the past, reinforces our belief in and commitment to longitudinal research that takes the temperature of public attitudes, opinions, and media preferences essential to understanding the functioning of society itself.

—EED, February 2019

Appendix A: METHOD

To cite this study:

APA: Dennis, E. E., Martin, J. D., & Hassan, F. (2018). *Media use in the Middle East, 2018: A seven-nation survey*. Northwestern University in Qatar. Retrieved from www.mideastmedia.org/survey/2018

MLA: Dennis, Everette E., Justin D. Martin, and Fouad Hassan. *Media Use in the Middle East, 2018: A Seven-Nation Survey*. Northwestern University in Qatar, 2018, www.mideastmedia.org/survey/2018.

Chicago: Dennis, Everette E., Justin D. Martin, and Fouad Hassan. “Media Use in the Middle East, 2018: A Seven-Nation Survey.” Northwestern University in Qatar, 2018. www.mideastmedia.org/survey/2018.

The results for *Media Use in the Middle East, 2018* by Northwestern University in Qatar are based on more than 7,000 (N=7,635) face-to-face and telephone interviews across seven countries, conducted under direction of the Harris Poll, in conjunction with Pan Arab Research Center (PARC). The survey was conducted among the general population 18 years and older in seven countries: Egypt, Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia, and the UAE. These seven countries represent a broad spectrum of populations across the Arab region. The fieldwork for six of the countries in this sixth wave of the Media Use in the Middle East survey took place July 10 to October 9, 2018. Bureaucratic hurdles delayed data collection in Egypt, and so fieldwork in Egypt took place December 20 to 30, 2018.

Most questions asked in 2018 are replicated from prior years of the study, allowing many longitudinal comparisons. These results include expanded attention to entertainment media use and therefore provide more comparisons with the 2014 and 2016 surveys than with the 2013, 2015, and 2017 iterations, which focus more broadly on news and information use than specifically entertainment.

Some figures in this report do not include Egypt, Jordan, and Qatar, as officials in these countries did not permit the fielding of certain questions in some years of the Media Use in the Middle East study—Egypt and Jordan in recent years and Qatar only in 2013 and 2015. Excluded items mostly relate to censorship, government, politics, and religion. Additionally, Jordan data are only included for the years it was surveyed, the 2013, 2017, and 2018 editions of the study, not those conducted in 2014, 2015, and 2016. In all charts that do not include data from Egypt, Jordan, or Qatar, a footnote so reports.

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 seven nations. The multi-stage random probability sampling in Egypt, Jordan, Lebanon, Saudi Arabia, Tunisia, and the UAE produced 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, which were each in turn divided into administrative units or sectors, followed by a third division into clusters each comprised of 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.

While survey administration and sampling procedures varied somewhat by country, the method was designed to ensure representation of the national adult population in each country. Samples in all countries, except Egypt, include both citizens and resident expatriates. The sample in Egypt includes just citizens due to the small number of expatriates in this country. Groups that are not represented in the research include: visitors with no residence permit, farmers, servants, mentally disabled persons, and those in army barracks, hospitals, dormitories, prisons, or labor camps. In Lebanon, residents in areas with heavy Hezbollah presence were also excluded.

Interviews lasted, on average, 35 minutes. The total number of questions asked varied based on responses to previous questions. For example, some questions were asked only of internet users or users of specific social media platforms.

Approval of the survey and method were required by governing agencies in Egypt and Jordan, but not the other countries. As a result, a subset of questions was omitted in Egypt and Jordan at the direction of the overseeing government bodies. These exceptions are noted in the report where applicable.

A summary of completed interviews and response rates for 2013 through 2018 is as follows:

COUNTRY	COMPLETED INTERVIEWS (N)					
	2013	2014	2015	2016	2017	2018
Egypt	1,252	1,002	1,071	1,000	1,000	1,060
Jordan	1,250	-	-	-	1,009	1,060
Lebanon	1,256	1,000	1,000	1,008	1,018	1,002
Qatar	1,253	1,003	1,000	1,000	1,140	1,185
Saudi Arabia	1,252	1,009	1,005	1,017	1,016	1,095
Tunisia	1,250	1,016	1,012	1,016	1,000	1,204
United Arab Emirates	1,264	1,005	1,005	1,017	1,013	1,074
Total	**8,777**	**6,035**	**6,093**	**6,058**	**7,196**	**7,735**

COUNTRY	COMPLETED INTERVIEWS BY NATIONALITY (N)						
		2013	2014	2015	2016	2017	2018
Egypt	Nationals	1,252	1,002	1,071	1,000	1,000	1,000
	Non-nationals	0	0	0	0	0	0
Jordan	Nationals	1,044	-	-	-	881	953
	Non-nationals	206	-	-	-	128	62
Lebanon	Nationals	1,232	1,000	995	1,008	1,018	991
	Non-nationals	24	0	5	0	0	11
Qatar	Nationals	352	407	280	504	508	566
	Non-nationals	901	596	720	496	632	619
Saudi Arabia	Nationals	848	662	633	616	627	629
	Non-nationals	404	387	372	401	389	466
Tunisia	Nationals	1,150	906	909	913	896	1,100
	Non-nationals	100	110	103	103	104	104
United Arab Emirates	Nationals	313	234	250	488	481	500
	Non-nationals	951	771	755	529	532	574

COUNTRY	RESPONSE RATE (%)					
	2013	2014	2015	2016	2017	2018
Egypt	92%	%48	%97	46%	79%	72%
Jordan	75%	-	-	-	58%	79%
Lebanon	70%	50%	54%	49%	49%	48%
Qatar	54%	52%	53%	44%	37%	58%
Saudi Arabia	81%	78%	77%	77%	76%	74%
Tunisia	21%	86%	85%	89%	87%	33%
United Arab Emirates	70%	82%	86%	70%	73%	58%

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

Rim weighting uses a mathematical algorithm to help provide an even distribution of results across the entire dataset while balancing certain characteristics to predetermined totals. It weights the specified characteristics simultaneously and disturbs each variable as little as possible.

While the data within countries was weighted to be representative, the overall sample of 7,635 was not weighted across countries. That is, we do not claim that aggregated data is “representative,” per se, of the Mideast region as a whole. Weighting across countries was not applied due to the variable population sizes across the participating countries.

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

Total Sample

- **Sample size:** 7,635
- **Gender split:** 52% male, 48% female
- **Mean age:** 35 years old
- **Margin of sampling error:** +/- 1.2 percentage points

Egypt

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic
- **Fieldwork dates:** December 20 to December 30, 2018
- **Sample size:** 1,060
- **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

Jordan

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic
- **Fieldwork dates:** September 24 to October 9, 2018
- **Sample size:** 1,005
- **Gender split:** 50% male, 50% female
- **Mean age:** 32 years old
- **Margin of sampling error:** +/- 3.2 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 procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic
- **Fieldwork dates:** July 10 to August 13, 2018
- **Sample size:** 1,002
- **Gender split:** 50% male, 50% female
- **Mean age:** 37 years old
- **Margin of sampling error:** +/- 3.2 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 the household using a constant fraction sampling procedure
- **Mode:** Telephone, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** August 1 to September 4, 2018
- **Sample size:** 1,185
- **Gender split:** 56% male, 44% female
- **Mean age:** 34 years old
- **Margin of sampling error:** +/- 3.4 percentage points
- **Representative:** Adult population, less those in army barracks, hospitals, dormitories, and prisons

Saudi Arabia

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** July 20 to September 20, 2018
- **Sample size:** 1,095
- **Gender split:** 53% male, 47% female
- **Mean age:** 34 years old
- **Margin of sampling error:** +/- 3.1 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Tunisia

- **Sample design:** Multi-stage random probability sampling
- **Mode:** Face-to-face, adults 18 plus
- **Languages:** Arabic, French, English
- **Fieldwork dates:** August 8 to September 5, 2018
- **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 procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** July 14 to August 6, 2018
- **Sample size:** 1,074
- **Gender split:** 53% male, 47% female
- **Mean age:** 33.5 years old
- **Margin of sampling error:** +/- 3.4 percentage points
- **Representative:** Adult population, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Survey in the United States

Periodically, the report references the results of a survey conducted in the United States in October 2018. This survey was conducted online by Harris Poll from October 24 to 26 among 2,003 U.S. adults (18 plus years old). Figures for age, sex, race/ethnicity, education, region, and household income were weighted as necessary to align with their actual population proportions. Because the sample is based on those who agreed to participate in the Harris Poll panel, no estimates of theoretical sampling error or margin of error can be calculated.

United States

- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** English
- **Fieldwork dates:** October 24 to October 26, 2018
- **Sample size:** 2,003
- **Gender split:** 48% male, 52% female
- **Mean age:** 49 years old

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/2018.

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

Appendix B:
REFERENCES AND RELATED RESEARCH

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