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UNIVERSITY  
IN QATAR

مؤسسة الدوحة للأفلام

DOHA FILM INSTITUTE

# Entertainment Media Use in the Middle East

A Six-Nation Survey



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# Survey Overview

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## To the Readers and Users of the Study:

**E**ntertainment Media Use in the Middle East is a cooperative effort of two organizations, Northwestern University in Qatar and Doha Film Institute. It is with mutual respect and mutual interest that we entered into an agreement to better understand entertainment media and cultural attitudes in the Arab world.

DFI and NU-Q have different but complementary missions. One is a cultural institution with a mandate to nurture and promote a rising film industry for public benefit; the other is an academic institution concerned with learning and the advancement of knowledge in communication, journalism and media. Both share a commitment to educating and supporting talented personnel for the media and entertainment industries, while also helping lead or shape those enterprises. We agreed to join forces in developing this study to contribute to Qatar's cultural and economic trajectory, where modernity meets tradition. In doing so, NU-Q harnessed its research capacity and commitment to educating young professionals, while DFI offered its cultural and commercial expertise in the world of film and entertainment media.

This study speaks to each of the pillars of Qatar's grand strategy, its National Vision 2030, namely economic, environmental, human and social progress and development. It is in this context that the impact and potential benefits of a growing entertainment sector become clearest. Film is both a social force and an industry, and with DFI's active participation, Qatar's media industries are making their mark as a growing sector of a knowledge-based economy. Understanding how people make use of and respond to film is a specialty at NU-Q, and DFI helps define and contribute to human development and national culture. From those respective approaches we offer these findings as a foundation for those who simply want to learn more about entertainment media as informed consumers and citizens, and for those who work in and lead media organizations and policy in Qatar, the Middle East region or elsewhere around the world.

We are grateful to Robb Wood and Justin Martin at NU-Q for their leadership in almost all aspects of this project, from conceptualization to completion. Much appreciation to Fatma Al-Remaihi, Hanaa Issa, Elsa Weill and the Directorate of the Doha Film Institute for their contributions to the development of the questionnaire and the interpretation of the results. The collection of data and drafting of this report was carried out by Harris Poll, now part of The Nielsen Company, led by Humphrey Taylor, Kerry Hill, David Krane, Dean Kemp, Donna Knapp and Nira Colonero. We would also like to thank the Social and Economic Survey Research Institute at Qatar University for conducting the fieldwork in Qatar. The talented team at Column Five Media worked closely with us throughout the project to develop the website and interactive tool that have made these findings vastly more accessible and engaging. Lorraine Ahearn at the University of North Carolina was commissioned to develop the literature review that provides a backdrop for the study. We also thank NU-Q student Sarah Al-Derham, who conducted qualitative interviews among Qataris, adding useful context to a number of our findings.

It is our hope that this study and its attendant website at [mideastmedia.org](http://mideastmedia.org) will be useful in guiding and informing public understanding and public policy, fostering cultural enrichment, and encouraging continued creativity in entertainment industries.

**Everette E. Dennis**

Dean & CEO, Northwestern University in Qatar



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CEO, Doha Film Institute

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**E**ntertainment Media Use in the Middle East, carried out by Northwestern University in Qatar with the collaboration and support of Doha Film Institute, endeavors to fill a gap in available knowledge on entertainment media in the Arab world through a comprehensive survey in six countries across the region. Each organization contributed information from its respective academic, industry and professional sources. This work complements a previous study of news and information media use conducted by NU-Q in 2013, *Media Use in the Middle East*. These two studies represent a continuing commitment of Northwestern to foster understanding and development of media in the region.

As with our previous study, we encounter much diversity in media use in the region that is reflected not only in the mix of available content, but also in its points of origin. The Arab cultural marketplace has long welcomed Hollywood's movie industry, as well as films from Bollywood, Hong Kong and other filmmaking locales. In this study we see the interplay of public acceptance and criticism of Arab film, as well as films from outside the Arab world. In this study we observe a desire for more Arab films that reflect indigenous culture. In a region ravaged by conquest for centuries and recent wars as well, it is not unexpected that Arabs see their traditions sometimes denigrated by Western media portrayals. At the same time, we see that many Arabs greatly value the diversity of international content available to them on satellite television channels and online.

Given the paucity of studies of the scope reported here, it is our hope that this research will encourage more attention to the study of Arab media—and it is our commitment to continue these inquiries beyond the numbers offered here. With its great traditions of oratory and storytelling, the Arab world has much to offer both researchers and lay consumers of entertainment.

We feel privileged to engage in this research and to make it widely available to students and scholars, policymakers, institutional leaders, media professionals and interested readers everywhere.

**Everette E. Dennis, Robb Wood and Justin D. Martin**

Doha, Qatar, April 16, 2014

Efforts to assess the importance and impact of media in the Middle East in the years since the 2010-11 Arab uprisings have largely focused on the news media and their capacity to disseminate information and opinion. Whether the resulting influence on national identity and people's attitudes and behavior is perfunctory or profound depends on the commentator or scholar and the evidence they marshal. The same is true of examinations of the role and function of entertainment media in the Middle East, based on methods ranging from casual observation to systematic cultural analysis. But rigorous empirical studies drawing on personal interviews with actual people are sparse, with most coming from commercial sources rather than disciplined scholarship.

***Entertainment Media Use in the Middle East*** is the result of survey research in six Arab nations involving more than 6,000 face-to-face interviews in nationally representative samples—citizens and expatriates alike—and conducted Arabic, English and French. The result is a portrait of how people in the six countries, selected to represent the larger Arab world, make use of entertainment media in their daily lives and what they think about it. Unlike some studies of entertainment fare in the region, which focus on a fragmented aspect of the whole cultural landscape, this one is linked directly to the larger context of all media. Many excellent existing studies of Arab culture give short shrift to certain media and especially entertainment media as they delve into family relationships, religion and other aspects of the broader culture. This study, conducted by Northwestern University in Qatar (NU-Q) in collaboration with Doha Film Institute, complements a 2013 study by NU-Q of *Media Use in the Middle East* that was concerned mostly with the news media and Internet. It was in a reflection on that study, widely covered around the globe, that the need for greater intelligence about cultural and entertainment media was felt.

There is no dearth of speculation and opinion about the influence of all forms of entertainment on the attitudes and world view of individuals, communities

and Arab society itself. Recognizing that entertainment media content blends original programming from the Arab world with global offerings from Hollywood, Bollywood and other sources, there is much debate about how exposure to movies, television, online videos, music, sport, electronic games and other media benefit or harm the local culture. But as Arab media scholar Naomi Sakr has warned, the lack of actual audience evidence can lead to misconceptions about the influence of mass media. Outside of the news media, little is known about people's entertainment media choices in the Arab world, and for that reason this study was launched. The purpose of *Entertainment Media Use in the Middle East* is to understand what media forms, genres and outlets people actually use, including the choices they make and their opinions about their own viewing and that of others. All entertainment platforms (cinema, TV, online movies, music, video games, sports, even shopping) are considered. Since media live within the borders of specific countries—though their output may travel far—it is essential to understand what role governments, social and religious influences play, and what entertainment media users think about that. It is, after all, the media policies and regulation of governments, telecommunication authorities, film censors and others that guide or even control media use. Entertainment navigates and is defined by regimes of freedom of expression globally and in the several countries in the study. While there is no absolute freedom of expression anywhere, there is a continuum between control on the one hand and freedom and liberty on the other. The availability of entertainment content and programming is influenced by enabling legislation in some societies to censor and in others to self-censor. Thus the need to discern public attitudes toward government oversight and perceptions about the role of media in contributing to the larger culture are critical elements in any understanding of entertainment media use.

Building on NU-Q's 2013 study, it was determined to select six countries that best represent cultural and regional similarities

and differences within the Arab world from the Maghreb and Levant to the Gulf States. Calibrated to reflect representative countries, and cognizant of financial resources, those selected were **Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia** and the **United Arab Emirates**. The study includes individual country data against the backdrop of a regional average, thus showing the range of use patterns and attitudes, useful in understanding the entertainment media use of the region. The pre-study phase of this project included consensus conversations with faculty, staff, students and outside consultants at NU-Q, a substantial literature review included here, and interviews with experts on Arab film and entertainment from the academy and industry. All helped in questionnaire development and refinement. Early on, the leadership of Qatar's Doha Film Institute was consulted, and they expressed interest in being a partner in the project, thus providing a firsthand industry perspective as we developed the questionnaire, and contributing to the funding of the effort as well. The project is a genuine collaboration. Harris Interactive, now part of The Nielsen Company, and the Social and Economic Research Institute (SESRI) at Qatar University were contracted to do the field survey work in the six countries. A statement about the survey procedure can be found in the Methodology section.

Taking on a topic as broad, complicated and inclusive as entertainment media use in the Middle East naturally involves a strategy for organizing the study and retrieving its findings in a useful, coherent manner. Thus, questions across the countries examined the role of both media use and leisure time. Questions were posed to ferret out information on the various platforms, media forms and genres, including film, television, video games, music, as well as Internet and social media. The study also asked respondents whether they consume news as entertainment (via TV, online and numerous print formats). Considerable attention was given to regulation and censorship of entertainment media, content choices and children's entertainment media. While each chapter includes data from all six countries, a separate chapter reprises and codifies

the findings from the State of Qatar, the seat of our university and the media scene most immediately relevant to NU-Q, its administration, faculty and students. As always, the meaning of the findings are relevant in each of the six countries, but also well beyond, since some of the countries play a significant role in the production of entertainment fare.

Of special interest in the Islamic and Arab world are what have been termed "Ramadan media," or the special television programs, films and other content produced especially for the Holy Month of Ramadan. These include historical epic TV dramas called *mosalsalat* and produced especially for the revered month. As our literature review states, "Ramadan is a time of devotion and abstinence...associated with conspicuous consumption both in feasting and in viewing TV specially calibrated to sweep ratings and advertising revenues." Thus the survey includes questions that document Ramadan media habits contrasted with those through the rest of the year. There is precious little research on this important aspect of Arab media use, mostly relevant to entertainment, so these findings are especially noteworthy.

Findings from the study demonstrate an interplay between original entertainment content produced in the MENA region and that imported from outside. While enjoying entertainment fare from many parts of the world, East and West, there is a desire for more entertainment content from the region. This is closely tied to a belief that locally produced content contributes to the culture of the region in a way that content from elsewhere does not. Two-thirds (66%) of adults surveyed agreed that people benefit from watching content from different parts of the world, yet a nearly equal two-thirds (65%) prefer films that portray their own culture. Weighing in on Hollywood films, 43% of respondents find them enjoyable, while 34% think them morally harmful; 15% said they are morally beneficial.

In the cultural realm, there was what at first glance might seem a contradiction. Some 79% want entertainment to do more to preserve cultural traditions—and at the same



time 70% want more cultural integration with modern society. This may reflect what has been called the re-traditionalization of the region, where strong support for cultural traditions reflected in national dress and religious conservatism can live comfortably alongside modernization and an increasingly global society. Yet a vast majority believe entertainment content should be regulated for romantic content (69%) that presumably offends Islamic cultural traditions, while 74% want more regulation of violent content. Some 68% opine that offensive films and other entertainment should be banned altogether. These average findings for violent content regulation were quite stable across the region, with a high of 82% and 80% in KSA and Qatar to a low of 64% in Tunisia. Reaction to regulation for romantic content reached a high of 82% in Saudi Arabia and lows of 64-69% in UAE and Lebanon and 56% in Tunisia. While the numbers may differ on opposition to violent content across the region, especially involving children, this view is also quite prevalent in nations far from the Middle East, where TV and movie violence has been debated and regulated for decades. In this study, when asked whether exposure to entertainment desensitizes children to violence, responses were notably tepid, with an average of 41% expressing concern and ranges from highs of 56% and 52% in KSA and Qatar to lows of 31% and 30% in UAE and Tunisia—and only 24% in Egypt. There is also some fear that exposure to entertainment causes acceptance of negative stereotypes portrayed in films and TV with 44% agreeing on average; agreement reached highs of 57% and 53% in KSA and Qatar and a low of 28% in Egypt.

The findings show the people of the MENA region to be appreciative and voracious consumers of entertainment, just as our previous study found them to be attentive to news and information media. When it came to the most important sources of entertainment, respondents were asked to rate different forms on a scale from not very important to very important. Results had watching television programs (76%) slightly ahead of passing time online (72% of Internet users), with other choices being watching films on TV (66%), watching online videos (58% of Internet users), listening to music (56%) and shopping or fun/leisure (50%). Cinema attendance was

at 45% in the region, with a high of 82% in UAE and a low of 15% in Tunisia, no doubt due to the numbers of movie screens.

The reported global trend of “binge-watching” of TV and online entertainment series is also alive in the Middle East. Nearly half of women (49%) in the study reported “binge watching” of two or more episodes of a series in the same sitting vs. 31% for men.

Sports was consistently cited as one of the top online content choices. The likelihood for Internet users to be willing to pay to watch sports online was 31%—slightly lower than for films or video games, but higher than music or television series—with a high of 64% in UAE and a low of 13% in Lebanon.

The pages that follow offer detailed data and analysis of media use, preference and attitudes as well as a sense of how much tolerance or opposition there is to government regulation.

What the data seem to show is a region awash in entertainment fare and growing demand for more. There is openness to imports from abroad while at the same time a strong preference for local content. There is a self-consciousness about culture and identity, with an expectation that films and other entertainment should take this seriously. There is also enthusiasm for religious programming marked by heavy demand for programming during Ramadan.

What the data seem to show is a climate of receptivity for the growth of indigenous entertainment media in the region. This bodes well for an expansion of the media market—and the greater development of media and entertainment industries. There is an appetite for more and diverse content. Certainly, this adds weight to the need for more film and television production in the region with output that can have appeal across several countries. Online viewing of entertainment is strong in a region where high-speed Internet connectivity is moderate to high and where prevalence of mobile devices and smart phones is also high. If anyone doubted the robust nature of entertainment media use in the Middle East, where images of violence and civil unrest often dominate the news, there is good news in these data for consumers and content producers alike.

The results for the *Entertainment Media in the Middle East: A Six-Nation Survey* by Northwestern University in Qatar in partnership with Doha Film Institute, are based on face-to-face interviews conducted under the direction of the Harris Poll, in conjunction with Pan Arab Research Center (PARC) and Social and Economic Survey Research Institute (SESRI) at Qatar University.

The countries included in this study are Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates. These six countries were chosen to represent a broad spectrum of populations across the Arab region, including those in the Arab Gulf, North Africa, and the Levant. SESRI administered the interviews in Qatar, and PARC administered the interviews in all other countries.

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

The average interview length was 20-40 minutes, with variations based on language and number of questions asked. The total number of questions asked varied based on responses to previous questions. For example, some questions were asked only of Internet users, those who used a particular type of media for entertainment, and respondents with children under 18 in their home.

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

COUNTRY	COMPLETED INTERVIEWS	RESPONSE RATE %
Egypt	1,002	48%
Lebanon	1,000	50%
Qatar	1,003	52%
Saudi Arabia	1,009	78%
Tunisia	1,016	86%
United Arab Emirates	1,005	82%
<b>Total</b>	<b>6,035</b>	<b>62%</b>

Data weighting was applied in Egypt, Qatar, Saudi Arabia, Tunisia and the United Arab Emirates to ensure representation across these countries. Data weighting was not required in Lebanon, as the sample was representative of the surveyed population, taking into account Governorates gender and age of respondents. Rim weighting was used in Egypt, Saudi Arabia, Tunisia and the United Arab Emirates. The weighting factors used include geography, ethnicity, age and gender.

Weighting in Qatar used base weights reflecting sample selection probability, adjustment factors to account for non-response and calibration to make survey results were in line with population numbers based on the most recent Qatar Census.

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

**TOTAL SAMPLE**

Sample size: 6035  
 Margin of Error: +/- 1.3 percentage points

**COUNTRY:**

**EGYPT**  
 Sample design: Multi-stage random probability sampling procedure  
 Mode: Face-to-face, adults 18 plus  
 Languages: Arabic  
 Fieldwork dates: February 3 – 24, 2014  
 Sample size: 1002  
 Margin of Error: +/- 3.2 percentage points  
 Representative: Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

**COUNTRY:**

**LEBANON**  
 Sample design: Multi-stage random probability sampling procedure  
 Mode: Face-to-face adults 18, plus  
 Languages: Arabic, English, French  
 Fieldwork dates: January 27 – February 17, 2014  
 Sample size: 1000  
 Margin of Error: +/- 3.1 percentage points  
 Representative: Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps, and potential respondents in areas with heavy Hezbollah presence

**COUNTRY:**

**QATAR**  
 Sample design: Randomized sample within the household using a constant fraction sampling procedure  
 Mode: Face-to-face, adults 18 plus  
 Languages: Arabic, English  
 Fieldwork dates: January 29 – February 26, 2014  
 Sample size: 1003  
 Margin of Error: +/- 3.8 percentage points  
 Representative: Adult population, less those who live in labor camps, army barracks, hospitals, dormitories, and prisons

**COUNTRY:**

**SAUDI ARABIA**  
 Sample design: Multi-stage random probability sampling procedure  
 Mode: Face-to-face, adults 18 plus  
 Languages: Arabic, English  
 Fieldwork dates: January 27 – February 24, 2014  
 Sample size: 1009  
 Margin of Error: +/- 3.2 percentage points  
 Representative: Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

**COUNTRY:**

**TUNISIA**  
 Sample design: Multi-stage random probability sampling procedure  
 Mode: Face-to-face, adults 18 plus  
 Languages: Arabic, English, French  
 Fieldwork dates: January 31 – February 24, 2014  
 Sample size: 1016  
 Margin of Error: +/- 3.1 percentage points  
 Representative: Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps.

**COUNTRY:**

**UNITED ARAB EMIRATES**  
 Sample design: Multi-stage random probability sampling procedure  
 Mode: Face-to-face, adults 18 plus  
 Languages: Arabic, English  
 Fieldwork dates: January 27 – February 25, 2014  
 Sample size: 1005  
 Margin of Error: +/- 3.1 percentage points  
 Representative: Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

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

A more detailed summary of the methodology, sample and weighting can be found [mideastmedia.org](http://mideastmedia.org)

In an increasingly wired Arab world, mass media consumers do not live by news and politics alone, but rather use a host of entertainment resources that occupy and enrich, depending on one's perspective, their time. Cross-national studies of Arab media use, particularly since the Arab uprisings of 2010 and beyond, have examined mass media as tools of social change, privileging news and political conflict. This picture of mass media behavior is crucial but incomplete. Localized studies have shown that entertainment media use eclipses news and information-seeking in mass media (Ayyad, 2011; Deloitte, Dubai Press Club, 2013). Saudi Arabia, for example, consumes more YouTube content per capita than any country in the world (Kerr, 2014), and surveys focusing exclusively on legacy news use, to the exclusion of entertainment, can miss important media influences. For these reasons, Northwestern University in Qatar, in partnership with Doha Film Institute, undertook what is the most comprehensive survey of entertainment media use in the Arab world ever conducted. What follows is a snapshot of some of the results from each area of entertainment media explored in the survey.

## MEDIA AND LEISURE

An overarching trend observed in this research is that people want more entertainment media from the Middle East and North Africa (MENA). While they may consume and enjoy entertainment from all parts of the world, people in the region ultimately have a strong cultural drive reflected in their entertainment choices and desires.

The large majority agrees more should be done to preserve cultural traditions (79%). Two-thirds prefer to watch films that portray their own culture and would like more entertainment to be based on their culture and history (65% each). That said, two-thirds also acknowledge that their culture should integrate with modern society and people benefit from watching content from different parts of the world (70% and 66%, respectively); this is also the case among country nationals (70% and 63%, respectively, agree).

Almost all Arab nationals consume entertainment media in Arabic (film, television, music, online content). The use of English among nationals varies widely by medium. Very few nationals read print material or watch TV programs in English (14% and 18%, respectively). Comparatively,

a third listens to music in English (32%) and even more – about four in ten – watch films and online videos in English (46% and 40%, respectively).

A large majority of Arab nationals – about nine in ten – consume film, television, music and online content produced in the MENA region. Comparatively, two-thirds of nationals watch films from outside the region (64%). Fewer watch other content from outside the region (35% online content, 30% music 23% television).

People in these countries are most likely to watch and enjoy films and television from the MENA region, but many report enjoying content from outside the region as well. Arabs – nationals and expats – also feel strongly that films and television produced in the region are more accurate portrayals of Arabs and life in the Arab world and are better for morality than those from outside the region. In fact, they are more likely to say films and television from outside the region are harmful for morality than good for morality. Perhaps, therefore, Hollywood (and other non-MENA) films and television might be considered “guilty pleasures” that are enjoyed by many respondents despite the fact that many feel they are harmful.

## FILM

Film is an important outlet for entertainment in the MENA region, though less so in the sense of actually going to the cinema. Fewer than half of people in the region ever go to the cinema (45%). Once again, there is great variation by country; the majority of residents of the UAE go to the cinema, while very few in Tunisia do (82% vs. 15%).

Younger people are the most likely to watch films via all formats – television, cinema, online and disc. Three-fourths of Internet users watch films online, and four in ten do so at least once a week (75% and 42%, respectively). One-third says they would be likely to pay to stream or download films (33%).

## VIDEO GAMES

Four in ten people in the region play video games (43%); half of men and a third of women play video games (49% vs. 36%).

Gamers are more likely to play alone than with others (57.5% alone, 42.5% with others). Those who do play socially are equally likely to do so online as offline (22% and 21%).

Unlike other entertainment media explored in this survey, gamers in the MENA region are more likely to play video games in English than in Arabic (67% in English vs. 56% in Arabic). Country nationals are more likely to play video games in Arabic, but even the majority of gamers in this group play in English (73% of nationals play in Arabic, 59% play in English).

## TELEVISION

MENA residents rely on television as a primary form of entertainment; seven in ten watch television every day. Free-to-air is the most common format for watching television (69%), but one-third of internet users watch television online (36%). Internet users are twice as likely to stream shows online as to download them to a device (30% vs. 12%).

Four in ten people in the region “binge watch” television programming; that is, they watch two or more episodes in one sitting. Women are much more likely to binge watch than men (49% vs. 31%).

## MUSIC

Music is a very important source of entertainment for young people. Almost all of those under 25 listen to music and nearly two-thirds listen to music every day (94%, 63%). Seven in ten in this group say music is important for their entertainment (71%). For under 25s, listening to music is nearly identical in frequency and importance to TV watching; 94% watch TV at all, 60% watch every day, and 71% say it is important.

More than three-quarters of people in all six countries listen to Arabic music and a sizable minority listens to Western music (77% vs. 42%). Four in ten nationals in the five countries, excluding Egypt, listen to Western music (41%), while few Egyptians listen to Western music (8%).

## INTERNET AND SOCIAL MEDIA

Given the prevalence of the Internet in the region, and the Gulf states in particular (96% UAE, 87% Saudi Arabia, 85% Qatar, 62% Lebanon, 47% Tunisia, 36% Egypt), it is perhaps not surprising that the Internet is important for entertainment. Six in ten Internet users pass time online at least once a day for entertainment (59%); this jumps to 68% among those under 25, but even half of those 45 and older are online every day for entertainment (52%). A third of Internet users watch online videos every day (35%).

Facebook is the predominant social networking site in the region; nine in ten Internet users are on Facebook (89%). Its use is high among all demographic groups except Qatari nationals. Only a third of Qatari nationals use Facebook (36%). Qatari nationals are more likely to use Instagram (46%), and are as likely to use Twitter (37%), as Facebook.

Men in the MENA region are more likely to be online than women (74% vs. 63%). A gender difference is observed in all countries except the UAE, where both genders are equally likely to be online (97% men, 95% women).

## REGULATION AND CENSORSHIP OF ENTERTAINMENT MEDIA

About seven in ten respondents believe entertainment should be more tightly regulated for violent and romantic content, and that some scenes should be deleted, or whole programs banned, if some people find them offensive. Support for regulation and censorship is expressed most strongly in the Gulf states.

While the majority opposes the airing of “offensive” entertainment, they still want their entertainment to reflect “reality.” Two-thirds of those surveyed feel it is okay for entertainment to portray problems in society (67%).

Two-thirds of respondents agree that government oversight helps produce quality entertainment (65%). Residents of Saudi Arabia and Qatar are the most likely to support government involvement in entertainment production, while only a third in Tunisia agree (84%, 76% and 37%, respectively).

## CONTENT CHOICES

Social media have a strong influence on entertainment choice. Nearly two-thirds of Internet users say social media are important for their entertainment choices (64%).

The majority of Internet users choose to comment or share their opinions about entertainment online (55%).



## CHILDREN AND ENTERTAINMENT MEDIA

There is a clear belief in households with children that exposure to entertainment media has positive effects. Two-thirds agree entertainment helps children be more creative and imaginative and better socialize with others (66% and 62%, respectively). A majority also believes exposure to entertainment media helps children with hand-eye coordination and fine motor skills, and to learn skills needed at school (57% and 55%, respectively).

People with children in the home also express some concerns about entertainment media. Nearly half of people with children in the home feel the entertainment their children are exposed to leads to poor health and obesity (45%). This belief is particularly acute in Qatar where two-thirds agree (65%). Four in ten also agree that entertainment leads to a lack of focus and concentration and makes children desensitized to violence (42% and 41%, respectively).

Two-thirds of those with children in the home feel exposure to entertainment media helps children become more tolerant of other cultures (64%), while half agree that entertainment helps children get a better sense of their own culture (52%). A sizable minority believes films and TV reinforce negative stereotypes that children accept (44%).

## A FOCUS ON QATAR

There are some entertainment habits unique to Qatar. Qatar residents are much more voracious readers of print media for entertainment compared with those in the other countries; this includes newspapers, books and magazines. Eight in ten Qatar residents read newspapers compared with two-thirds overall (81% vs. 65%), and half do so daily (53%). Qatar residents are also more likely than others to participate in sports and exercise (83% Qatar vs. 65% total sample), and three in ten in Qatar claim to exercise every day (31%).

Only three in ten Qatar residents watch Qatar-produced television, and even fewer watch online content or listen to music from Qatar (18% and 14%, respectively). A meager 9% watch Qatar-produced films. Half of Qatari nationals watch Qatar-produced TV, 32% listen to Qatari music, 29% watch online content from the country, and 18% watch films made in Qatar. Qataris are more likely in general to consume content from the United States than from Qatar.

Going to the cinema to watch films is popular among non-Arab expats in Qatar, but not as much among Arabs in the country. Two-thirds of non-Arabs go to the cinema (71% of Asian expats, 67% of Western expats), compared to fewer than half of Arabs (43% of Qatari nationals, 38% of Arab expats).

People in Qatar are strong consumers of online news and TV news for entertainment; more so than residents of other countries in this study.

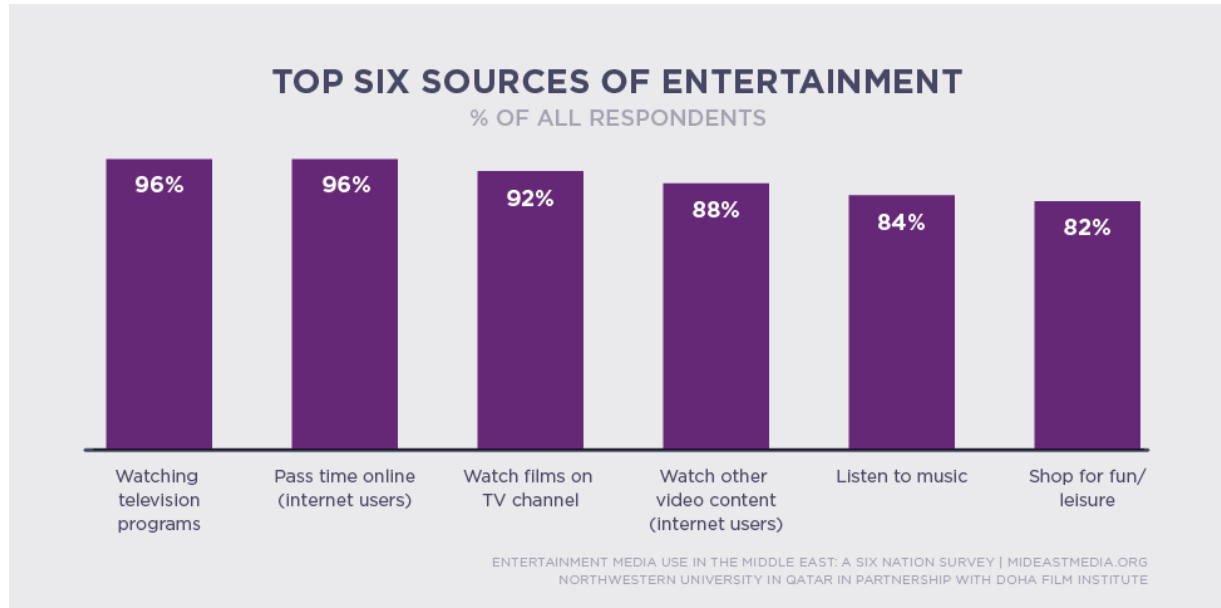
Non-Arabs in Qatar are more likely to listen to music for entertainment than Arabs living in the country. Only half of Qataris report listening to music for entertainment (compared to 87% of Asian expatriates, 84% of Western expats, and 66% of Arab expatriates). This figure for Qatari nationals is low compared to nationals of other countries (82% of nationals overall listen to music).



# Media and Leisure







## SUMMARY

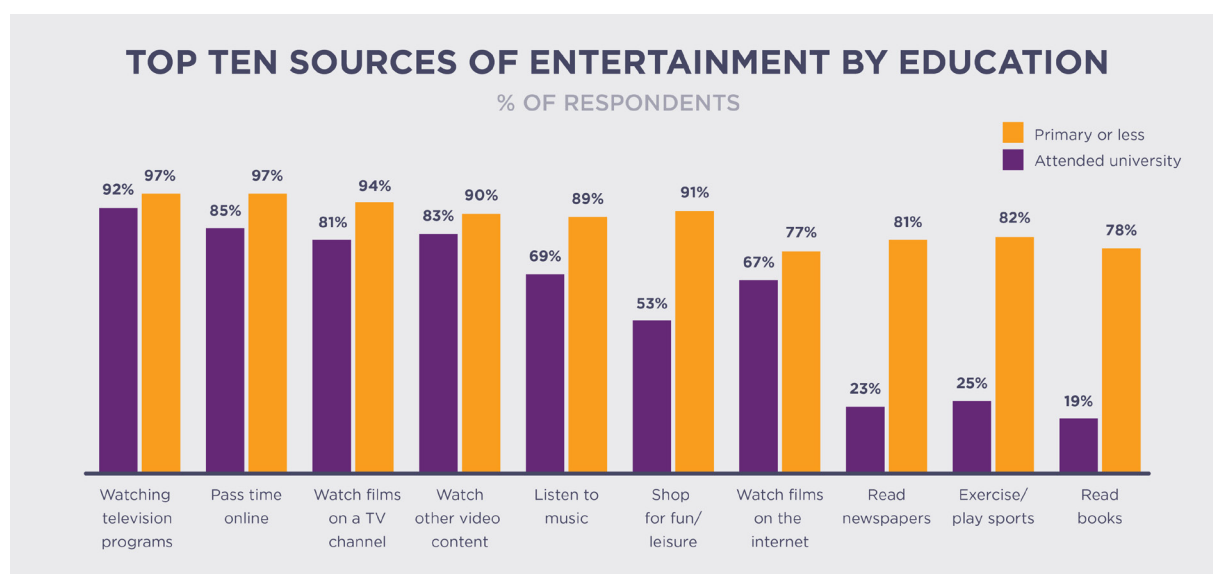
To provide context to the use of media for entertainment in the MENA region, participants were asked about their involvement in a multitude of activities for entertainment. “Involvement” was measured as both the perceived importance of each type of entertainment, as well as the amount of time devoted to it. The language and geographical origin of entertainment is also explored. Among the types of entertainment media considered in this survey are passive forms of entertainment (watching television and films, listening to music), somewhat more attention-demanding pursuits in entertainment (playing video games, reading, spending time online), and entertainment that requires physical activity (offline shopping, playing sports, attending the cinema). This introductory chapter provides a general setting for the more detailed considerations of entertainment in later chapters, in which the major types of entertainment media are explored. This chapter points out overall involvement in entertainment, and differences among broad segments of the overall population—such as country of residence, gender, age, income, and education level—in their perceptions of, and engagement in, various activities.

## INVOLVEMENT IN ENTERTAINMENT

The results suggest entertainment is an integral part of life for people in the MENA region, and their entertainment interests are wide and varied. Television is the dominant form of entertainment across the board; more than nine in ten watch television programming and films on television (96% and 92%, respectively), and seven in ten watch television every day. Almost all Internet users pass time online for entertainment (96%), and six in ten do so daily. Large majorities also listen to music and shop for fun and leisure (84% and 82%,

entertainment, other materials are not read as frequently.

Two-thirds play sports and exercise for entertainment (65%); 15% say they play sports or exercise every day, while four in ten do so at least once a week (39%). More people exercise than play video games, although some are as committed to gaming as exercising; nearly half play video games at all (43%), and 14% play every day (similar to 15% who exercise daily). While film viewing is highly common



respectively). While half of respondents listen to music on a daily basis, shopping is more of a weekly or monthly activity. Large majorities of Internet users watch films and other online video content for entertainment (76% and 88%, respectively); a third watch online videos daily (35%) but watching full-length films online is less common.

The majority of those surveyed read for entertainment, but this is not as popular as other forms of entertainment. Two-thirds read newspapers and slightly fewer read books and magazines (65%, 60%, and 56%, respectively). Nearly four in ten read comic books (38%). While a quarter of survey participants read newspapers daily for

overall, physically going to the cinema is less common (45% do so).

Residents of all six countries in this survey watch television (including films on TV) and listen to music for entertainment, and all Internet users, for the most part, pass time online and watch online videos. After that, we see some variation in use of other forms of entertainment by country. Those based in Saudi Arabia and the UAE are generally more likely to participate in all forms of entertainment. Egyptians and Tunisians are less likely than others to participate in the more “active” forms of entertainment such as playing sports (37% and 45%, respectively) and going shopping for fun (62% and 66%, respectively).

Additionally, residents of Egypt, Lebanon and Tunisia are much less likely than those in the Gulf states (UAE, Saudi Arabia and Qatar) to read for entertainment, including all types of material such as newspapers, books, magazines and comic books. Video game playing varies considerably by country, from about two-thirds in Saudi Arabia and the UAE (65% and 63%, respectively) to only a quarter of those in Tunisia and Egypt (26% and 29%, respectively). Watching films in the cinema also varies considerably. Most UAE residents go to the cinema (82%) and about half of the residents of Qatar and Lebanon do so (52% and 46%, respectively). Going to the cinema is far less common in Egypt and Tunisia (28% and 15%, respectively).

Men are more likely than women to access entertainment content in general, with the exceptions of watching television and shopping, which both do equally. The most marked differences between the genders are reading newspapers (71% men vs. 58% women), exercising and playing sports (75% vs. 54%) and playing video games (49% vs. 36%). There is also large variation in entertainment activities by age. The youngest age group (under 25) is far more focused on entertainment pursuits than their older counterparts (45 and older). Notably, young people are much more likely than the most senior group to listen to music (94% vs. 70%), shop for fun (86% vs. 72%), exercise and play sports (74% vs. 48%), watch online videos (92% vs. 79%), play video games (68% vs. 16%), read

comic books (43% vs. 24%) and watch films via all formats (TV, DVD, Internet, cinema).

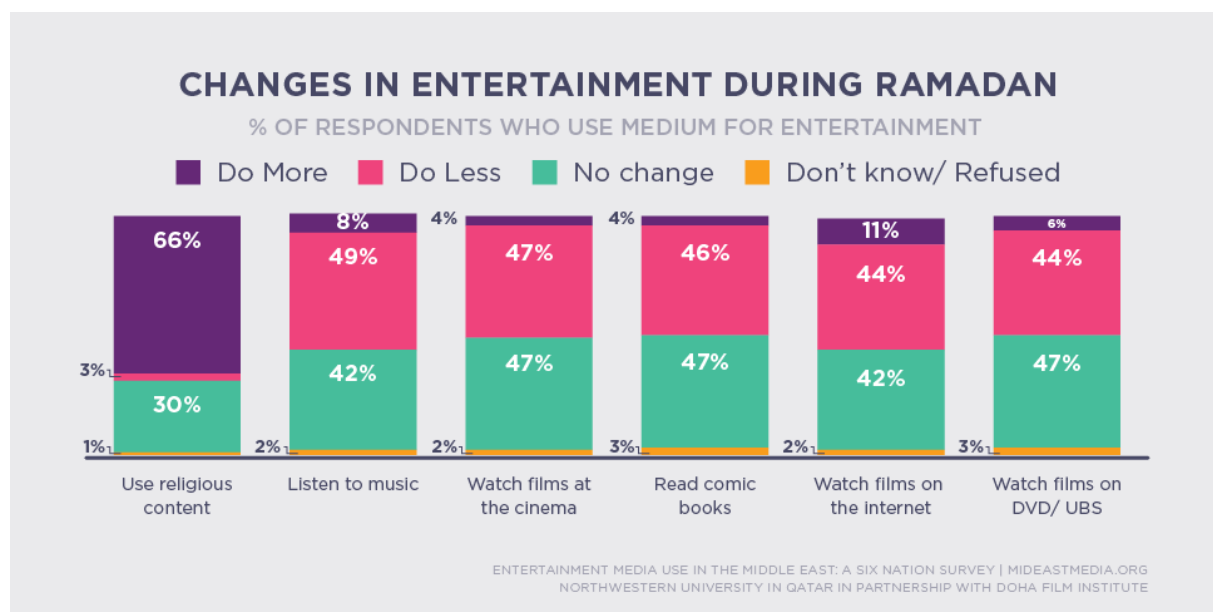
Generally speaking, those in the lowest income quartile spend far less time accessing entertainment than those with more income. Entertainment is also associated with education; those with only a primary school education or less are far less likely to consume entertainment or participate in entertaining activities, while those who have attended university are the most likely to participate in all forms of entertainment.

The level of importance assigned to a form of entertainment is generally related to the time devoted to that activity. For example, nearly all of those under 25 listen to music (94%) and the majority do so on a daily basis (63%). It is therefore not surprising that the large majority in this age group consider music important for their entertainment (71% say it is very or somewhat important vs. 40% of those 45 and older). A few exceptions are observed, though. While men and women are equally likely to shop for fun, women find this to be more important for their entertainment (55% women vs. 45% men). Those under age 25 are less likely than those older to consider watching television and reading important for entertainment, while they are more likely than those older to consider listening to music, passing time online and watching videos as important for their entertainment purposes.

## ENTERTAINMENT HABITS DURING RAMADAN

The types of activities people report engaging in change somewhat during the Islamic holy month of Ramadan. While the amount of change varies by activity, on average about half of those surveyed change what they do during this month—either doing it more (such as using religious content) or doing it

As an overall trend, those in Saudi Arabia and Tunisia are more likely than others to say their entertainment activity *increases* during Ramadan, while those in Qatar and Egypt are more likely to say their entertainment activities decreases. Those in the UAE and Lebanon are more likely to report no change in behavior during the holy month of Ramadan. UAE has



less (such as listening to music). On the whole, people are less likely to take part in entertainment-related activities during Ramadan, and are more likely to use religious content and spend time with family and friends (66%, 40% and 34%, respectively, do more). People are also more likely to watch television during Ramadan (41%). On the other hand, half of respondents say they do not listen to music as much during Ramadan. People also watch fewer films during this month, via all formats (cinema, online, disc and TV). The amount of time spent reading newspapers is least likely to change during the holy month, followed by reading magazines and exercising/playing sports (60%, 55% and 54% do not change).

a large non-Muslim expatriate community and Lebanon has the largest percentage of Christians of any Arab country, which may contribute to entertainment-as-usual during Ramadan. Of note, a large majority of Egyptians use more religious content during Ramadan (86%), while only 39% of those in Lebanon use more religious content. Two-thirds of Tunisians spend more time with family during this holy month (64%) while only 22% of those in Qatar do so.

Non-Arab expats are less likely to change their entertainment habits during the month of Ramadan, while Arabs generally spend more time with family and accessing religious content and less time with entertainment-related activities.

## LANGUAGE AND ENTERTAINMENT

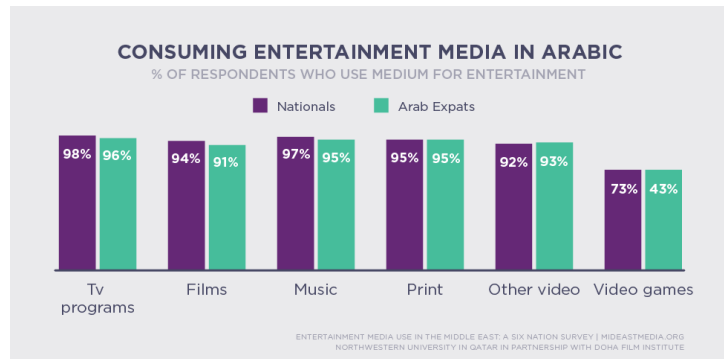
The language in which entertainment is consumed varies considerably by nationality and medium. Almost all Arabs—more than nine in ten—consume most forms of media (film, television, music, print and online videos) in Arabic. Fewer than one in ten non-Arabs consume entertainment media in Arabic. There is some variation in Qatar, though, where slightly fewer Arabs (nationals and expats) watch films and online videos in Arabic (about eight in ten for each).

The picture is more complex with regard to consuming media in English. Almost all Western expats consume all media in English, and the majority of Asian expats do as well. The use of English among country nationals varies widely by medium. Very few country nationals read print material or watch TV programs in English (14% and 18%, respectively). Comparatively, a third listen to English music (32%) and even more—about four in ten—watch films and online videos in English (46% and 40%, respectively). Arab expats are more likely than nationals to consume media in English, but still far behind their consumption in Arabic. Notably, three-fourths of Arab expats watch films in English and half listen to English music.

There is also wide variation in consumption of English content among citizens from the six countries. Almost no Egyptians consume

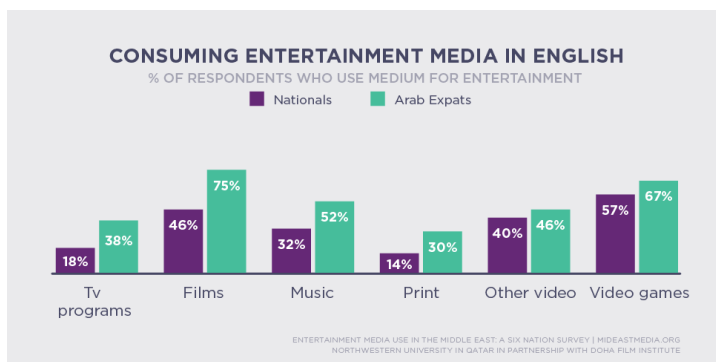
majority of nationals in the Gulf states and Lebanon watch English-language films and the majority of Qatari and Lebanese nationals also watch online videos in English.

Video games are an outlier with regard to language. Overall, gamers are more likely to play in English than Arabic (67% vs. 56%). As



with other media, Western and Asian expats play video games almost exclusively in English. More than half of nationals play in English compared with three-fourths who play in Arabic (57% vs. 73%). The gap is narrower for Arab expats, who are almost as equally likely to play in English as in Arabic (67% vs. 73%). Most Qatari nationals (85%) and Lebanese nationals (76%) play video games in English.

Younger respondents (under 25), who listen to music more often overall, are more likely than those older to listen to music in both Arabic and English. The oldest age group (45 and older) is generally less likely to consume any entertainment media in English.



content in English, except for 30% of gamers who play English video games. Nationals in the Gulf states and Lebanon are the most likely to consume English content overall. A strong

While Arabic and English are the two main languages of entertainment in the MENA region, there are some demographics within the six countries—reflecting either history or expatriation—which consume media in other languages. Television programs in Hindi, for example, are popular among Asian expatriates in Qatar and the UAE, as are Hindi music and films, and French is popular in Tunisia for all entertainment media.

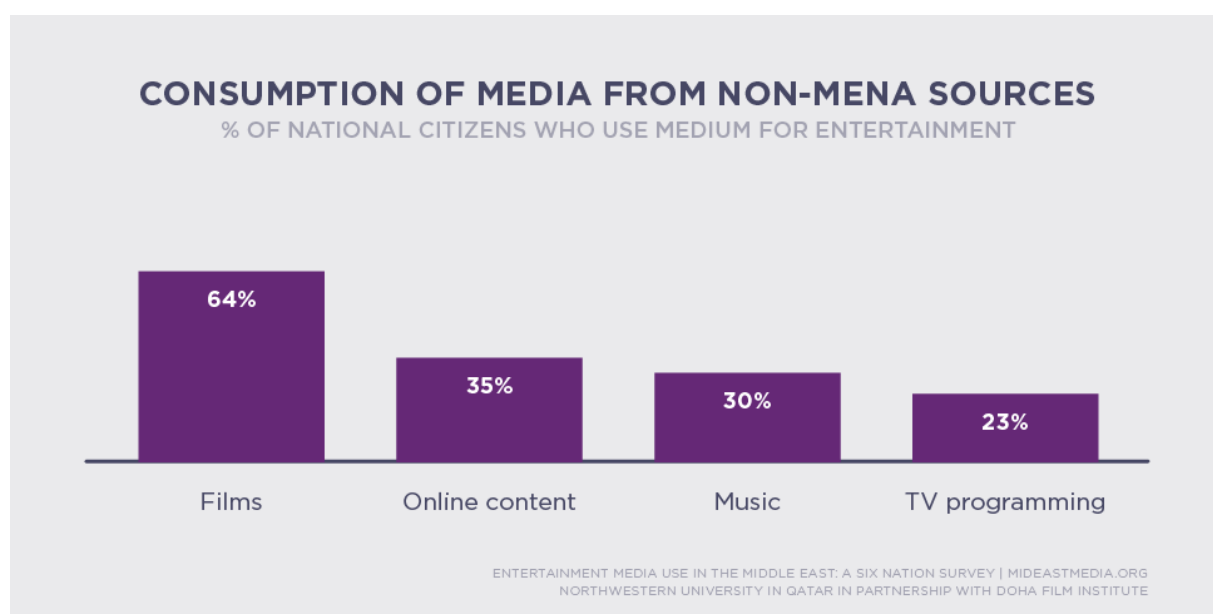
## SOURCING OF ENTERTAINMENT

As with language, the source of entertainment consumed varies considerably by country and nationality. A large majority of Arab respondents – about nine in ten – consume film, television, music and online content produced in the MENA region, compared with two in ten non-Arabs who do so. Additionally, more than nine in ten country nationals watch television and listen to music from their own country and eight in ten watch films and online content from their country. Qatari nationals are different from other country nationals in this respect. Half of Qatari nationals watch television produced in the country

nationals are the most likely to watch US films (7 in 10 do so in both countries), while those in Egypt and Tunisia are less likely to do so (29% and 34%, respectively). More than half of Qatari nationals watch US films (55%).

People in the MENA region are less likely to consume other types of media—online content, music, television—from the US (32%, 27% and 17%, respectively).

Three in ten respondents watch films from India, likely due to the presence of Asian expats; one quarter of all respondents



(51%) and one in three listen to music and watch online content from Qatar (32% and 29%, respectively). Only one in five Qatari nationals watch films produced in Qatar (18%).

Films from the United States are fairly popular across all nationalities. Six in ten Western and Arab expats watch US (Hollywood) films (60% and 62%, respectively), as do nearly half of Arab nationals (46%) and a third of Asian expatriates (34%). Lebanese and UAE

watch European films. Fewer watch films from Turkey or Asia-Pacific (17% and 8%, respectively). One in five or less consumes music, television and online content from Europe, India, Turkey or Asia-Pacific.

Younger respondents are more likely than older participants to consume content from around the world, including the MENA region (film, music, television, online content), as well as the United States (film and music), Europe (film and music) and Turkey (film and television).

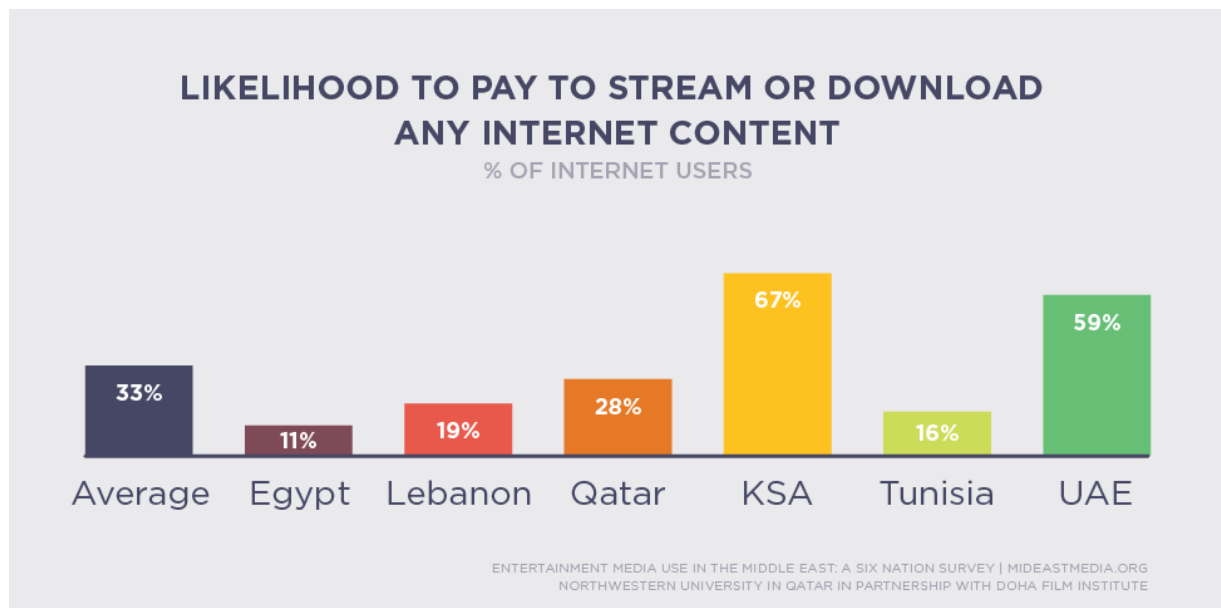
## STREAMING AND DOWNLOADING CONTENT

Likelihood to pay to stream or download entertainment content varies by the type of content. While half overall indicate a likelihood to stream or download at least one form of content (49%), this ranges from 23% for television shows to 35% for video games. Internet users in the MENA region are more likely to pay for video games, films and sports events online (35%, 33% and 31% respectively), and less likely to pay for music and television series (28% and 23%, respectively).

Residents of Saudi Arabia are by far more likely than those from all other five countries to pay to stream/download Internet content. About six in ten Internet users in Saudi Arabia say they would be likely to pay for films, television, sports events and video games online, and half would pay for digital music. Fewer than half of respondents in the other five countries are willing to pay for any one form of online entertainment content. Four in ten Internet users in the UAE will pay to stream/download films, and fewer respondents

from the Emirates expressed willingness to pay for video games and music (36% and 33%, respectively).

Western expats show greater likelihood to pay to stream or download music, television and video games (41%, 31% and 43%, respectively) than nationals or other expats, perhaps because some of their preferred content is less accessible in the MENA country in which they reside. Men show much greater interest than women in paying to stream or download sports events (40% vs. 18%) and video games (38% vs. 30%), as well as films (35% vs. 30%). Women, on the other hand, are somewhat more interested in streaming/downloading television series (25% vs. 21%). Older Internet users (45 and above) generally show less interest in paying to stream or download entertainment content, but are as likely as younger Internet users to be willing to pay to watch sporting events online. Income is not a factor in likelihood to pay for online content.

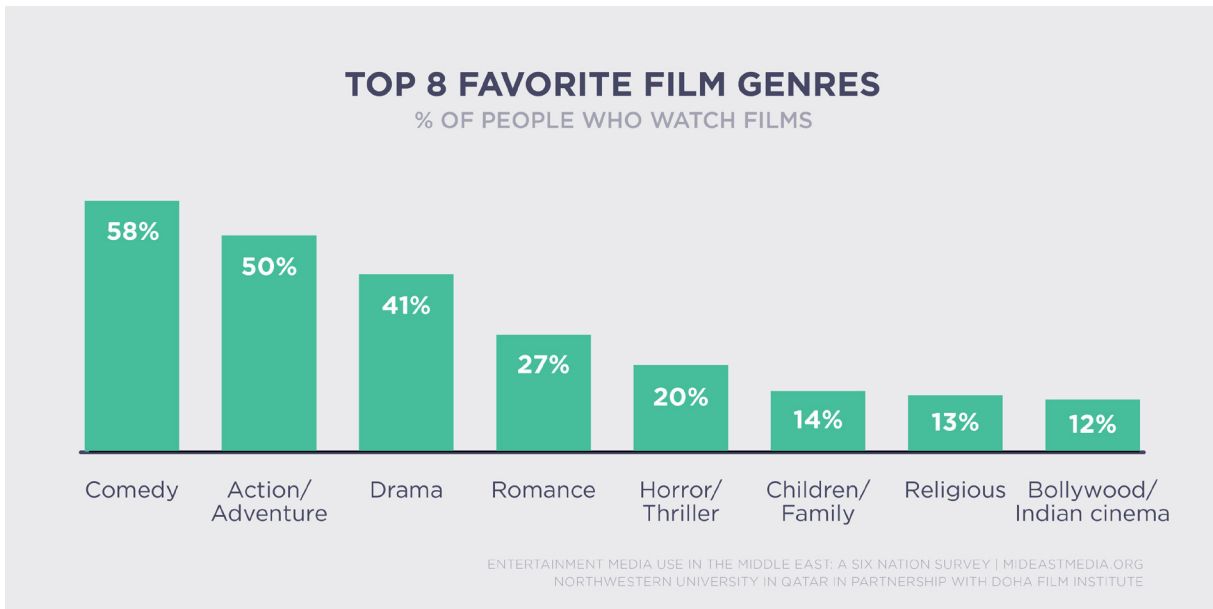


Three concentric circles are positioned on the left side of the image. The word "Film" is centered within the innermost circle.

# Film







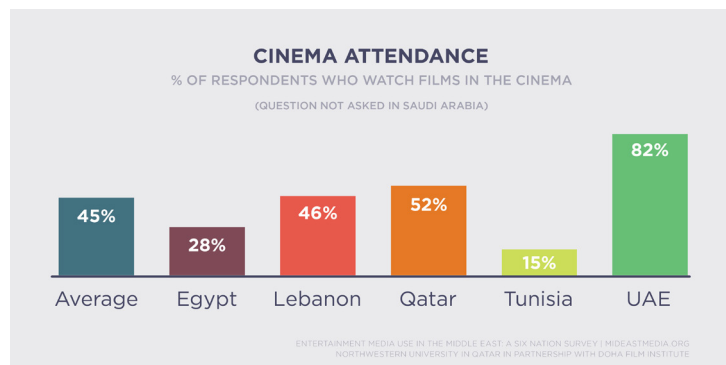
## SUMMARY

Film is an important outlet for entertainment in the MENA region, though not necessarily in the traditional sense of going to the cinema. In fact, the majority of individuals in the countries surveyed say they *never* watch films in the cinema (55% never do). By far, the most popular means of watching films is on television (nearly all people in the region do so at 92%). The Internet also is an important method for viewing films; three-quarters of Internet users watch films online. A majority also watches films on disc, such as DVDs, BluRay, etc. (53%). Those who watch films on the Internet are twice as likely to stream films online as they are to download films to a device, and a third are likely to pay to stream or download films online. Younger viewers (under age 35) are more likely to watch films overall and do so via multiple channels.

Comedy, followed by action/adventure and drama, are the favorite genres of film. All demographic groups like comedies, but preferences for other genres vary by age, gender and method of viewing.

While Arab-produced films generally are preferred, there is widespread viewership of films from around the world. On the whole, though, film preferences are tied closely to one's national origins. Those of Arab descent (nationals and Arab expatriates) prefer to watch films in Arabic, but many also watch films in English. They also prefer to watch films produced in the MENA region, but many watch films from other regions as well, including the United States in particular. Western expats watch films almost exclusively in English, and almost all the films they watch are from the U.S. and Europe. Very few Western expats watch films produced in the MENA region or other parts of the world.

People in MENA watch films from a variety of regions, yet consider films from the Arab region to be a better mirror of Arab culture than films from other parts of the world. They also consider Arab films to be a more positive influence on morality.



## GOING TO THE CINEMA<sup>1</sup>

In the countries covered in this study, film viewing is much more likely to take place on a “home screen” than in a cinema.

Fewer than half of the people in the countries covered in this study go to the cinema at all (45%). Cinema-going is especially rare in Tunisia, where only 15% ever attend. Going to a cinema is also uncommon in Egypt, where less than one-third say they ever watch films in a cinema (28%). About half go to the cinema in Qatar and Lebanon (52% and 46%, respectively). The UAE is the only country covered where going to the cinema is quite common; a large majority attends the cinema in the UAE (82%). There are no cinemas in Saudi Arabia.

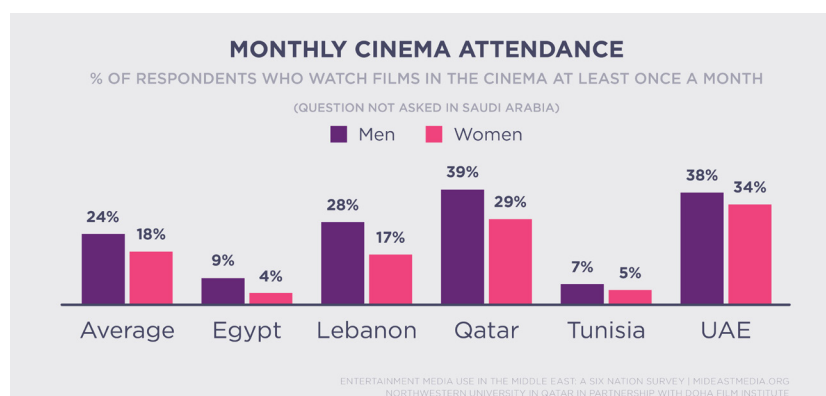
In Qatar and UAE, countries in which expats outnumber nationals, cinema-going varies greatly by nationality. Non-Arab expats are far more likely to attend the cinema than Arabs in these countries. In Qatar, about two-thirds of Asian and Western expats go to the cinema (71% and 67%, respectively), compared with four in ten Qatari nationals and Arab expats (43% and 38%). In the UAE, essentially all Asian and Western expats go to the cinema (97% and 99%, respectively), compared with two-thirds of nationals and Arab expats (67% vs. 68%).

In the MENA region overall, the cinema is more popular among men than women—nearly half of men go to the cinema compared with four in ten women (49% vs. 40%)—but this gender difference varies by country. Men are much more likely than women to attend the cinema in Qatar, Egypt and Lebanon, whereas cinema attendance is equally high in the UAE and equally low in Tunisia across genders.

Cinema attendance generally is more popular among young people, particularly those under 35, even in those countries where the practice is otherwise rare. Overall, only one-quarter of those aged 45 and above ever watch films in a cinema, while more than half of those under 35 do so (25% vs. 55%). While attendance at

the cinema varies by country, the pattern of viewership by age is similar across the countries covered in this study, with younger individuals more likely to attend the cinema than their older counterparts. Younger individuals also are more likely to watch films on the Internet and on disc, suggesting a greater interest in film overall.

Attendance at cinemas is strongly correlated with income. Those in the highest income bracket are more than twice as likely to go to the cinema as those with less disposable income (58% highest quartile vs. 27% lowest quartile). Cinema-going also differs greatly by education level. Generally, the higher an individual's



education, the more likely they are to go to the cinema. Only one in ten of those with primary education or less ever goes to the cinema, compared with two-thirds of those who have attended university (9% vs. 65%, respectively).

Only a quarter of people in the region see cinema attendance as an important factor in their entertainment (26%). As with frequency of attendance, the perceived importance of watching films in the cinema as a means of entertainment varies by age, income, education and nationality. Younger people who watch films in the cinema are more likely to see this activity as important, as are those with higher educational achievement. Nationals in the five countries with cinemas and Arab expats are far less likely to think of cinema-going as an important source of entertainment than are Asian and Western residents in the MENA region.

<sup>1</sup> Saudi Arabia, which does not have cinemas, is not included in statistics about watching films in the cinema.

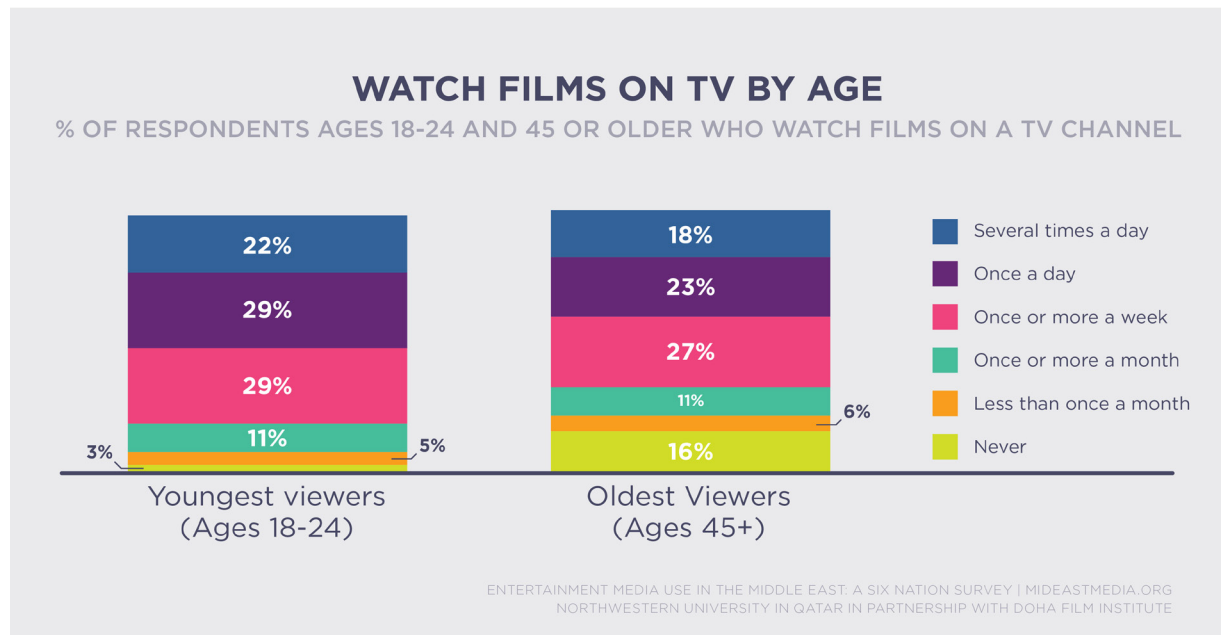
## WATCHING FILMS ON TELEVISION

Television is the dominant medium for watching films in all six countries in the study and across all age groups. Three-quarters of people in MENA watch films on TV at least once a week, and nearly half of them do so on a *daily basis* (45%). Watching films on TV daily (sometimes several times a day) is especially common in Saudi Arabia (64% watch daily) and Egypt (67%), but less marked in Qatar (32%) and the UAE (23%).

There are some differences between men and women in the amount of time spent watching films on TV. In Saudi Arabia, the

UAE, Egypt and Tunisia, women are more likely than men to watch films on TV on a daily basis. Viewership by gender is more equal in Lebanon, while men are more likely to watch films on TV daily in Qatar.

Consistent with the frequency with which people view films on television, two-thirds view this as an important source of entertainment, and it ranks second in overall importance for entertainment behind only viewing of other television programs. TV is considered much more important than any other medium for viewing films.



## WATCHING FILMS ON THE INTERNET AND ON DISC (DVD, BLURAY, ETC.)

The Internet is a very important medium for watching films among those who are online. Three-quarters of Internet users watch films on the Internet, and four in ten do so at least once a week (42%). Watching films online is more frequent among Internet users in Saudi Arabia (63% do so at least once a week), Tunisia (57%) and Egypt (51%) than elsewhere in the region.

Of Internet users, those under 25 are much more likely than those 45 or older to watch films on the Internet at least weekly (51% vs. 30%, respectively), and men are somewhat more likely to watch films online weekly or more than women (45% vs. 38%, respectively). Nationality, income, and education have relatively little effect on the likelihood of watching films on the Internet.

Those who watch films on the Internet are twice as likely to stream films online as they are

not as popular as television or online viewing, but it is still a common practice. About half of those surveyed watch films on disc at all, but less than a quarter do so at least once a week (22%). Watching films on disc is much more common in Saudi Arabia than in the other five countries surveyed, perhaps in response to a lack of cinemas in the country. In fact, nearly half of Saudi residents watch films on disc at least weekly (44%), much more than any other country.

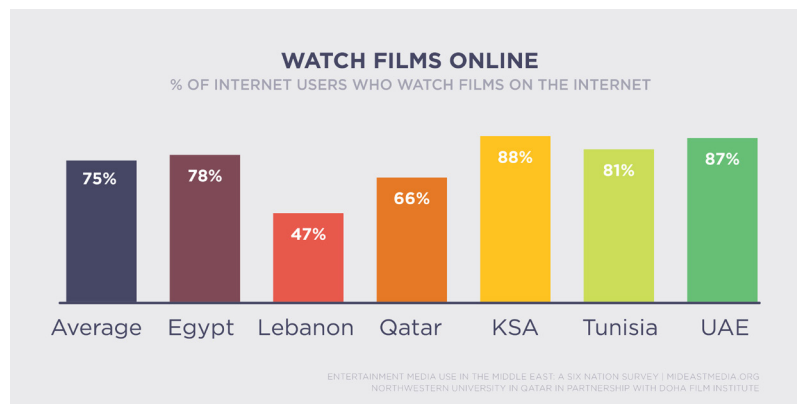
Younger people are more frequent users of DVDs and other discs. Two-thirds of those under 25 watch films on disc, while two-thirds of those 45 and older *never* watch films on disc. Income and education levels also affect film-viewing on disc. Six in ten of those in the highest income quartile watch film on disc compared with four in ten in the lowest quartile. Two-thirds of those with university degrees watch films on disc,

compared with eight in ten of those with a primary education or less who *never* do so.

Nationals of all six countries, as well as Arab expats, are far less likely than others to watch films on disc—they are nearly twice as likely *never* to watch them as are Asian and Western expats. This may be because the films that Asian and Western expats prefer to watch cannot be found on television, and discs offer an alternative means to access

them. (Specifically, 81% of Western expats watch films on disc, compared with 72% of Asian expats, 58% of Arab expats, and 47% of nationals.)

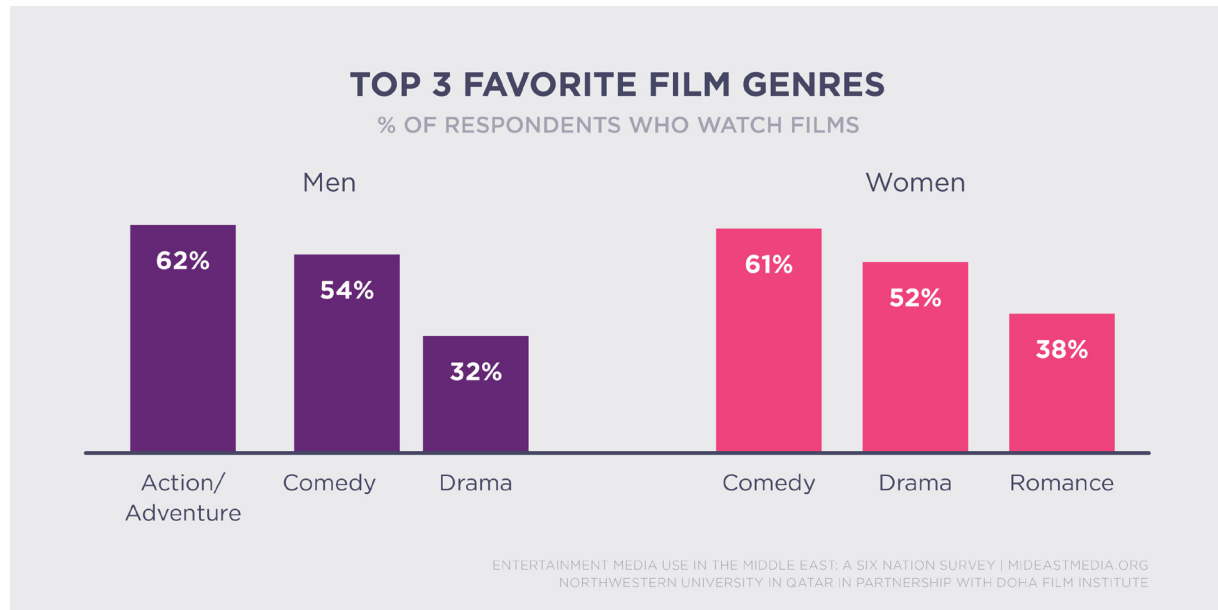
While three-quarters of Internet users watch films online, fewer than half assign importance to using the Internet for this purpose, compared with two-thirds who say watching films on TV is important for entertainment (45% vs. 66%). Watching films on disc is considered a less important source of entertainment – only 28% attach importance to using discs as a source of entertainment.



to download films to a device, and about one-third say they would be likely to pay to stream or download films. An equal one-third would be likely to pay to download video games and sporting events, but fewer would pay to download music or television shows. Internet users in Saudi Arabia and in the UAE are far more likely to say they would pay to watch films online (61% and 41%). By comparison, about one in five in the other countries would pay to stream or download films.

Viewing films on disc (DVD, BluRay, etc.) is

## FAVORITE FILM GENRES



When asked to select their favorite genres of film, people most frequently chose comedy (58% cite comedy as one of their top three choices), closely followed by action/adventure (50%), and drama (41%). A quarter prefers romance films, and slightly fewer favor horror/thrillers (27% and 20%, respectively).

Younger film viewers are drawn more to action/adventure films than are their older peers. Those under 25 are nearly twice as likely as those 45 and older to put this genre in their top three choices (61% vs. 33%). Younger film viewers also express a stronger preference for romance and horror/thriller genres. Older people, on the other hand, enjoy dramas and religious

themed-films more so than younger film viewers.

There also are some pronounced gender differences. Men are drawn more to action/adventure and horror/thriller films, while women tend to prefer dramas and romance.

Medium correlates somewhat with the types of films viewed. People are more likely to prefer dramas and religious films in a television format, while they prefer viewing action/adventure and horror/thriller films via other methods (cinema, Internet and disc). This may be driven by the types of films that air on television versus those that only can be accessed through other means.

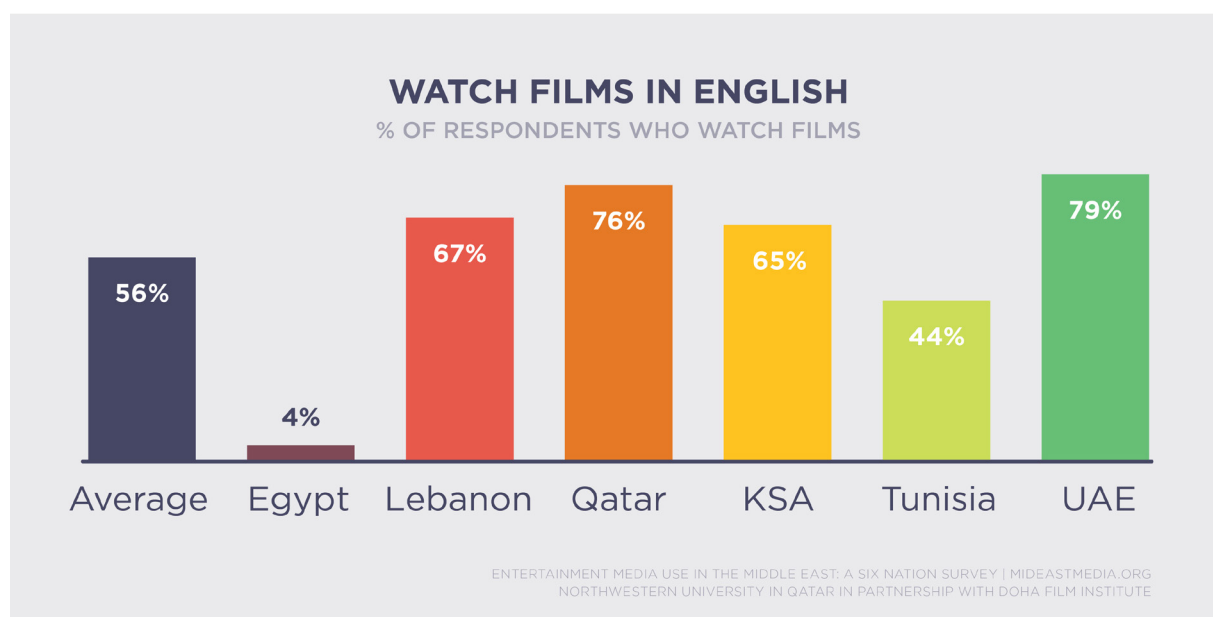
## LANGUAGES FOR WATCHING FILMS

Films, more so than other media, are consumed in a variety of languages. While people in the region are most likely to watch films in Arabic, this does not preclude them from watching in English or other languages. Three-quarters of those who watch films see films in Arabic, although a majority also watches films in English (56%). Arabic viewing is especially marked in Egypt and Tunisia (96% vs. 93%), and is almost as high in Lebanon and Saudi Arabia (89% vs. 83%), but it is much less common in the UAE and Qatar (52% vs. 50%) where there are higher expat populations. About eight in ten nationals and Arab expats in Qatar watch films in Arabic, compared to one in ten non-Arab expats who do so.

who watch films see them in English (76%), and even more so in the UAE (79%). People in these countries watch films in English regardless of nationality—seven in ten nationals and Arab expats watch films in English in Qatar, as do eight in ten Arabs in the UAE.

While Arabic-language films dominate in Lebanon and Tunisia, films in English are much more popular than French in Lebanon (67% vs. 10%) and as popular as French in Tunisia (44% vs. 47%).

Overall, non-Arab expats far prefer films in English, with very few of them—less than one in ten—watching films in Arabic.



The Arab and non-Arab distinction is even more pronounced in the UAE where almost all nationals and Arab expats watch films in Arabic, while almost no non-Arab expats watch in Arabic.

English is cited more often than Arabic as the language of choice for watching films in Qatar, where three-quarters of those

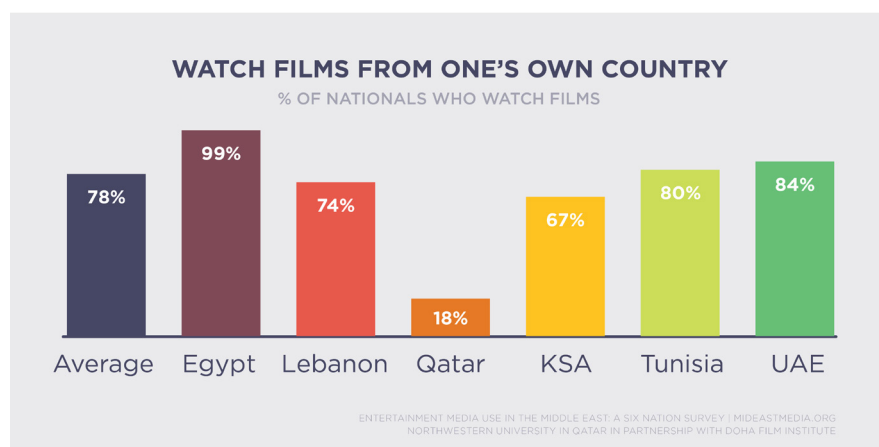
Arabic is (naturally) the language of choice for watching films among those of Arabic origin, but three-fourths of Arabic expats overall and nearly half of country nationals also watch films in English (75% and 46%, respectively). There is a strong preference for Hindi-language films among the Indian population in the region (81%).



## SOURCING AND ENJOYMENT OF FILMS BY REGION

Those who watch films in the MENA region view content from a variety of regional sources, most commonly from their own country (60%). Many also watch films from the Mashreq-Levant countries (Egypt, Jordan, Lebanon, Syria and Palestine, etc.), more so than from the Arab peninsula/Al Khaleej countries (Saudi Arabia, Kuwait, the UAE, Qatar, Bahrain, Oman and Yemen) or the Maghreb countries (Morocco, Tunisia and Algeria, etc.) – 49%, 19% and 13%, respectively. After movies from the Arab region, viewed by 78% overall, the most frequently mentioned external source of content is, by far, the U.S. (47%). One-third of all film viewers watch films from India, but these are watched almost exclusively by Indians in the region (96%). One

Within Qatar and the UAE, there are pronounced differences in viewing by nationality. In Qatar, two-thirds of nationals and Arab expats watch films from the Arab world, compared with only one in ten Asian and Western expats. A majority of all groups living in Qatar watch films from the U.S., but viewership is highest among Western expats (86%). Westerners also are more likely to watch European films (51%). In the UAE, all nationals and Arab expats watch Arab films (84% of nationals say they watch UAE-produced films specifically), while almost no Western expats do. Interestingly, nationals and Arab expats in the UAE are *more* likely to watch U.S. films than Asian and Western expats (71% nationals, 80% Arab expats, 13% Asian expats and 43% Western expats).



in four watches films from Europe; viewership of films from others region is much lower.

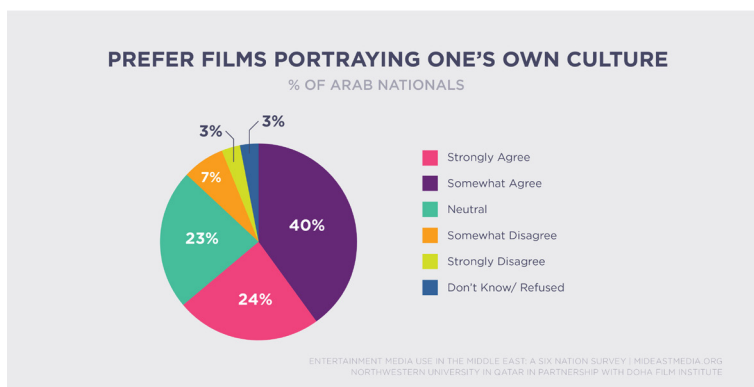
Local sourcing – that is, content from the viewer's own country – is very strong in Egypt (99% watch at least some Egypt-sourced content in films), Lebanon (74%) and Tunisia (78%), is moderate in Saudi Arabia (57%) and the UAE (40%), and is low in Qatar (9%). Other Arab content is particularly strong among film-watchers in all countries except Qatar, where content from the U.S. (56%) and India (34%) is seen more than regional content. Indian-originating content is very marked in the UAE, the country with the highest Indian population. U.S. material is very common in Lebanon, where nearly three-quarters watch films from the U.S. (72%).

Consistent with a higher level of viewership overall, Arab films and television are enjoyed more than films and television from other sources, with eight in ten residents in the MENA region responding expressing this preference (81%). Among films and television from other sources, U.S. (Hollywood) productions are most preferred (that is, cited as enjoyable the most often) by six in ten responding (60%), and Turkish, Indian (Bollywood) and European films and television achieve equal levels of enjoyment by about half of residents who responded (49%, 47% and 47%, respectively).

Egypt is the only country in which U.S. (Hollywood) films and television are not the most-enjoyed from outside the region. Egyptians enjoy Turkish, Indian (Bollywood) and European films and television more than those from the U.S. (Hollywood). Indian (Bollywood) films and television are well-liked in the UAE, Saudi Arabia and Qatar, the countries with high Asian expat populations.

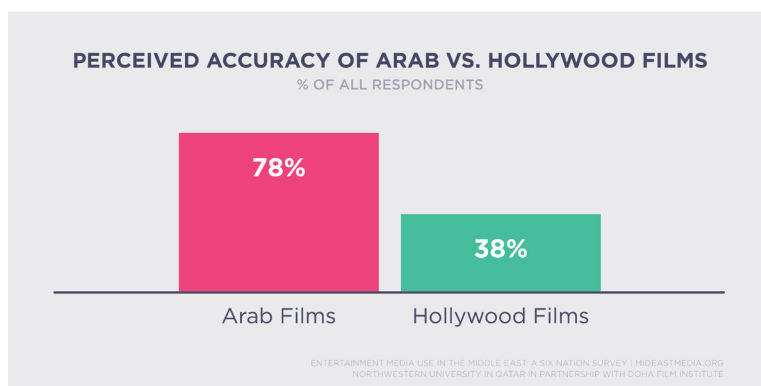
## FILMS AND THEIR CULTURAL CONTEXT

Cultural context plays a role in film-viewing. Two-thirds of people in MENA say they prefer to watch films that portray their own culture (65%), and a majority says films are an important source of information about their own culture (54%). The preference for films that portray local culture applies consistently throughout the MENA region, although it is much stronger in Saudi Arabia and much weaker in Tunisia. Tunisians seem much less sanguine toward films that portray Tunisian culture. Whether Tunisians feel films fail to show their culture accurately, or do not wish to see it accurately portrayed is moot; although the fact that fewer than half prefer to watch films that portray their own culture (46%), and only roughly a third of Tunisians find films an important source of information about one's own culture (35%) suggests that both elements of doubt are in play. At the other end of the spectrum, those in Saudi Arabia desire a closer association of films with culture. Three-fourths of those in Saudi Arabia prefer to watch culturally relevant films and look to films as an important source of information about their culture.



## PERCEIVED ACCURACY OF FILMS BY REGION

Arab films and television are considered a more accurate mirror of Arab culture and of people in the Arab world than are films and television from outside the MENA region. While Arab films and television are seen as accurately reflective of Arab people and culture by three-fourths of those in the countries surveyed, only about a third feel U.S. (Hollywood)



films and television accurately reflect the Arab culture (78% and 38%, respectively). Indian (Bollywood), European and Turkish films and television all achieve similar (rather low) status with respect to their accuracy in portraying Arabs, each being viewed as accurate by about one-third of viewers.

A belief in the accuracy of cultural portrayal by Arab films and television is strongest in Saudi Arabia, the UAE and Lebanon (90%, 90% and 86%,

respectively), but much less so in Qatar (59%). Arab nationals are more likely than non-Arabs to rate Arab films and television as being culturally accurate.



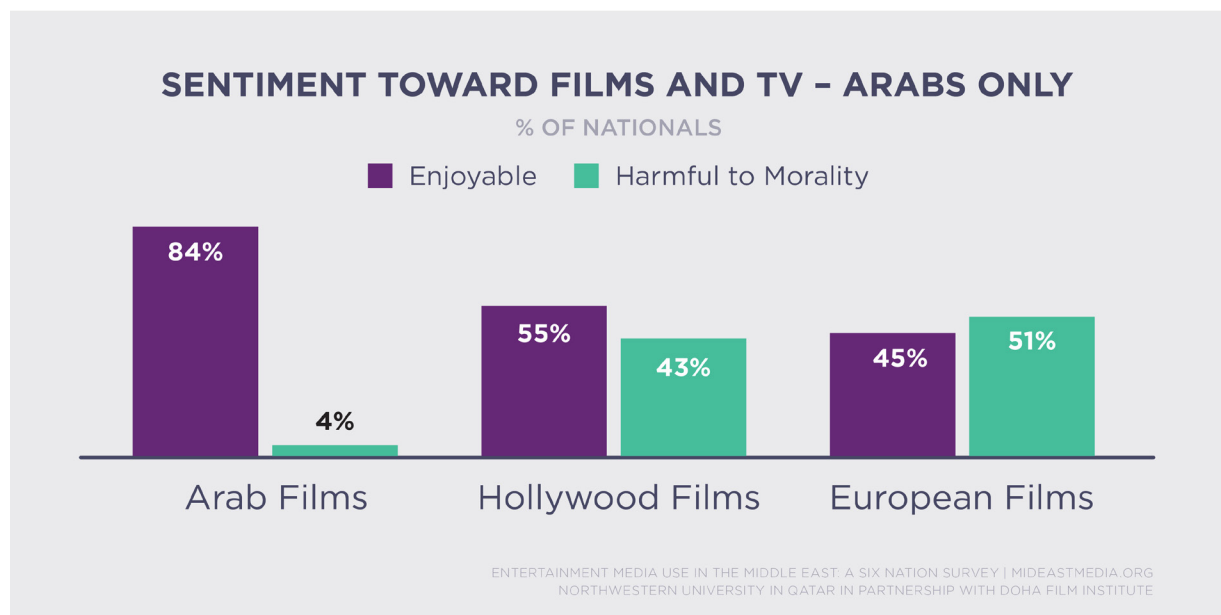
## PERCEIVED EFFECTS OF FILM ON MORALITY

People in MENA expressed opinions about the moral influence of films and television from various regions. These opinions do not necessarily correlate with how much people consume or enjoy those films and television.

Arab films and television are more likely to be seen as “good for morality” (69% responding feel this way) than are films and television from any other region. Less than one-quarter of residents feel films and television from other sources are good for morality, a consistently modest assessment in all six countries in the MENA region. In fact, they are more likely to describe films and television from outside the region as “bad for morality” than good. The oldest

On the whole, people from the MENA region most enjoy watching films and television from within the region, and believe films and television from the region best portray Arab culture accurately and generally are good for morality. Many people enjoy watching films and television from other parts of the world, while at the same time they do not necessarily feel these films and television accurately portray Arab culture and many believe these films and television are not good for morality (and in fact, are bad for morality).

Those with strongest opinions about preserving their culture (strong agreement that “more should be done to preserve cultural traditions”) are more likely to enjoy



age segment (45 and above) is the most likely to feel films and television from outside the region are bad for morality.

Nationality seems to play a large role in perceptions of morality. Those of Arab origin (nationals and expats) are more likely to say Arab films and television are good for morality, while Asian and Western expats are more likely to say US (Hollywood), Indian (Bollywood) and European films and television are good for morality.

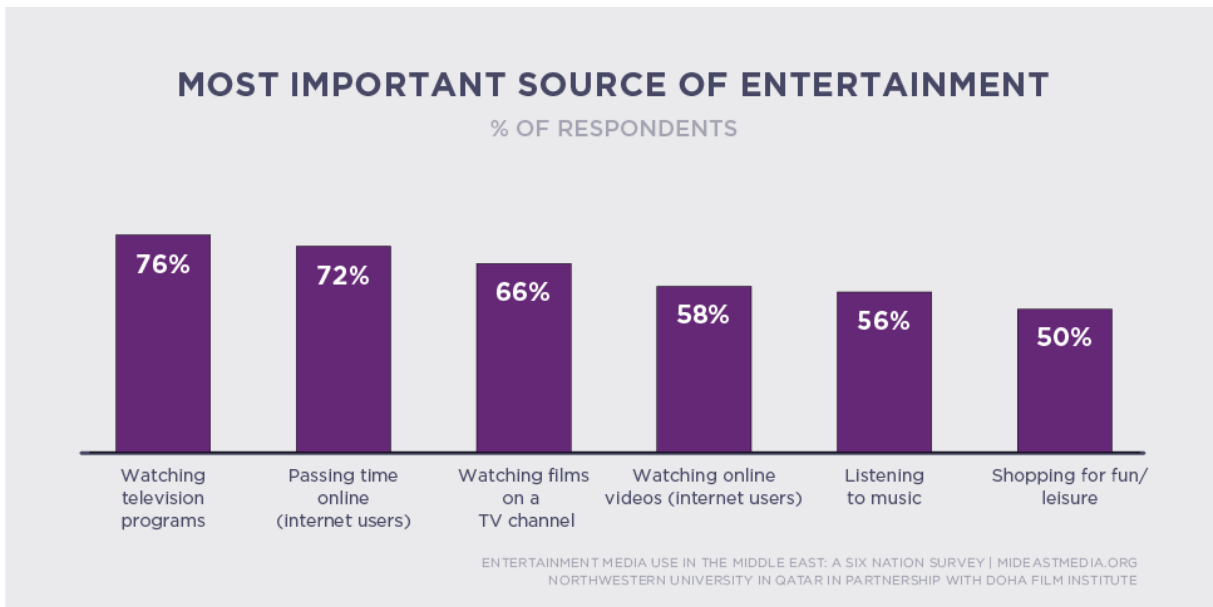
Arab films and television and to believe Arab films and television are accurate and good for morality. They also are more likely to feel non-Arab films and television are harmful to morality. At the same time, they are as likely as those who are less interested in preserving cultural traditions to watch and enjoy non-Arab films and television.

This issue of morality is discussed further in the Censorship and Cultural Attitudes chapter.



# Television





## SUMMARY

As might be found in any region, MENA residents rely on television as their primary form of entertainment; a large majority watch TV every day (70%). The prevalence of television in the lives of individuals is largely consistent across all the countries in this study and across demographic groups.

Television viewers are most likely to watch entertainment content produced in their own country, with the exceptions of Qatar and the UAE. Fewer than half in the UAE and only three in ten in Qatar watch television programming from their country for entertainment. Notably, while nearly all UAE nationals watch television programming from their country, only half of Qatari nationals do so (94% vs. 51%).

People are beginning to take more control of their television viewing. More than a quarter of respondents watch television shows when they choose to do so “all” or “most” of the time, and two-thirds do so at least some of the time. Additionally, four in ten have “binge” watched a television show, choosing to watch two or more episodes in one sitting. Women and younger individuals are more prone to binge viewing.

Some people are “interacting” online with the TV shows they watch. About one-quarter of Internet users discuss television shows online, but a very small number (6%) does so while watching the show. Additionally, 14% say they have voted for a contestant on a reality or talent show.

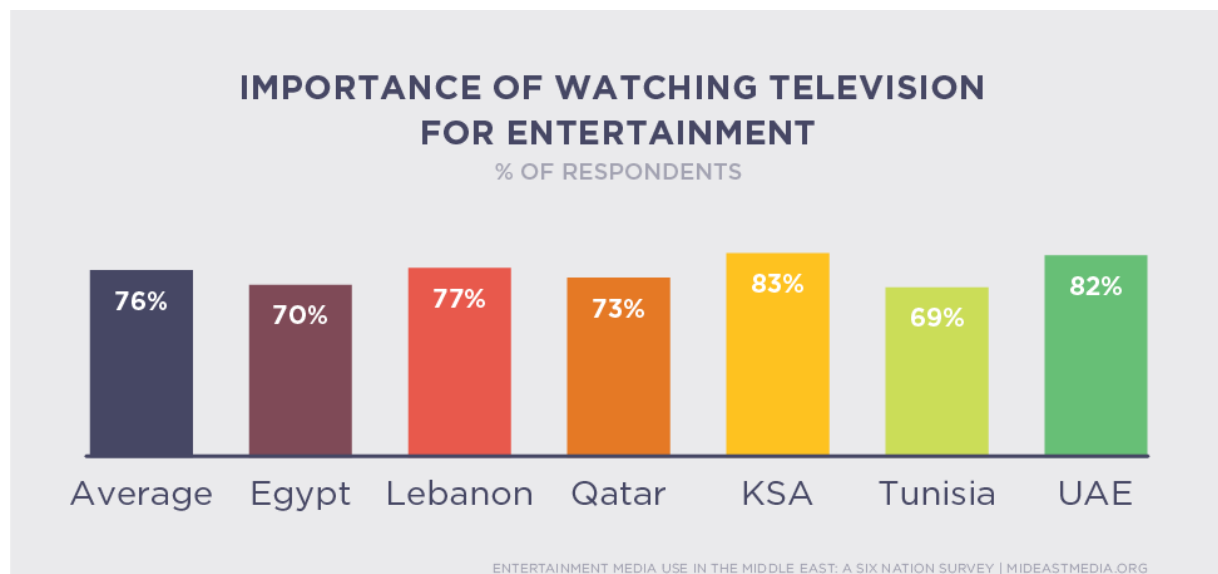
## WATCHING TELEVISION PROGRAMS

Television viewing is universal in the region; more than nine in ten residents in all six MENA countries in the survey watch television programming, and nearly three-quarters do so every day (70%). This pattern of watching TV at least once daily is consistent among all sectors of the population, although young and single people are slightly less frequent TV viewers.

While almost everyone watches television, a strong but smaller majority consider it an important source of entertainment. Three-quarters of residents in the six

countries report that watching television programs is important, with one-third saying TV programming is “very important” for entertainment. As noted in the Film chapter, television is also the most important and frequent place to watch films.

Watching television programs is especially important in Saudi Arabia (83% say this) and the UAE (82%), and slightly less so in Tunisia (69%). The perceived importance of TV for entertainment applies consistently to all sectors of the population.



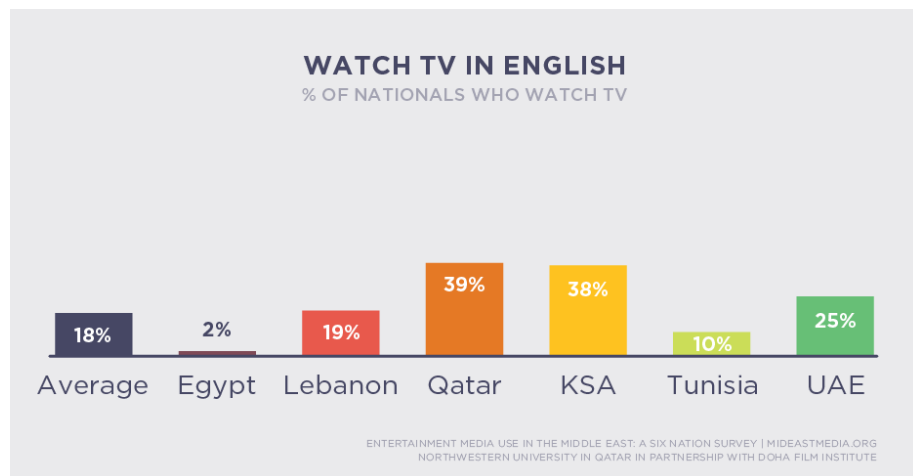
## LANGUAGES FOR WATCHING TELEVISION

Arabic is by far the most frequently used language for watching TV; well over three-quarters of all MENA residents in this survey watch TV programs in Arabic (81%). There are, however, sharp distinctions between countries in the incidence of watching TV in Arabic. In Egypt, Lebanon and Tunisia watching TV in Arabic is essentially universal, but much less so in the Gulf states. In the UAE, only a slight majority of the population watch TV programs in Arabic (52%), six in ten in Qatar and over three-quarters in Saudi Arabia (60% and 82%, respectively). This, of course, varies substantially by ethnicity. Almost all Arab nationals and expatriates in these countries watch TV programming in Arabic, while fewer than one in ten Asian and Western expats do so. Non-Arab expats in Qatar are slightly more likely to watch programming in Arabic, while essentially none of the Non-Arab expats in the UAE do so.

Younger viewers (those under 25) and older viewers (45 or older) are slightly more likely to watch TV in Arabic than those between 25 and 45. Those who have not attended university watch TV primarily almost exclusive in Arabic, while only two-thirds of those who have a university education watch in Arabic (half of this most educated group watches in English).

After Arabic, English is the language cited most often for watching television. However, watching TV in English is less prevalent than watching films in English (30% TV vs. 56% film). While nearly all nationals and Arab expats watch both television and films in Arabic, they are much

less likely to watch TV in English than films. Only 18% of nationals watch TV in English (vs. 46% who watch films in English) and 38% of Arab expats watch English TV (vs. 75% for films). Nearly all Western expats in the survey watch TV programs in English, as do most Asian expats (93% and 60%, respectively), but very few—less than one in ten—watch TV in Arabic. This is similar to film viewing among non-Arabs. Asian expats are actually most likely to watch television in Hindi (65%, 79% among Indian



expats specifically). Consistent with the ethnic make-up of each country, a majority of the population in Qatar watches TV in English, as do about half of the residents of Saudi Arabia and the UAE (54%, 46%, and 45% respectively). Comparatively, about one in five Lebanese residents watch some TV in English, more than in Tunisia or Egypt (19%, 12%, and 2% respectively).

Arabic and English generally cover TV viewing in the six countries, although there are pockets of viewing in other languages as well. Watching TV programs in Hindi, as noted above, is popular among Asian expats in the region, and French TV programming is somewhat popular in Tunisia, where a quarter watch in French (23%). There are small populations in Qatar, Saudi Arabia and the UAE who watch TV in other languages such as Urdu and Malayalam.

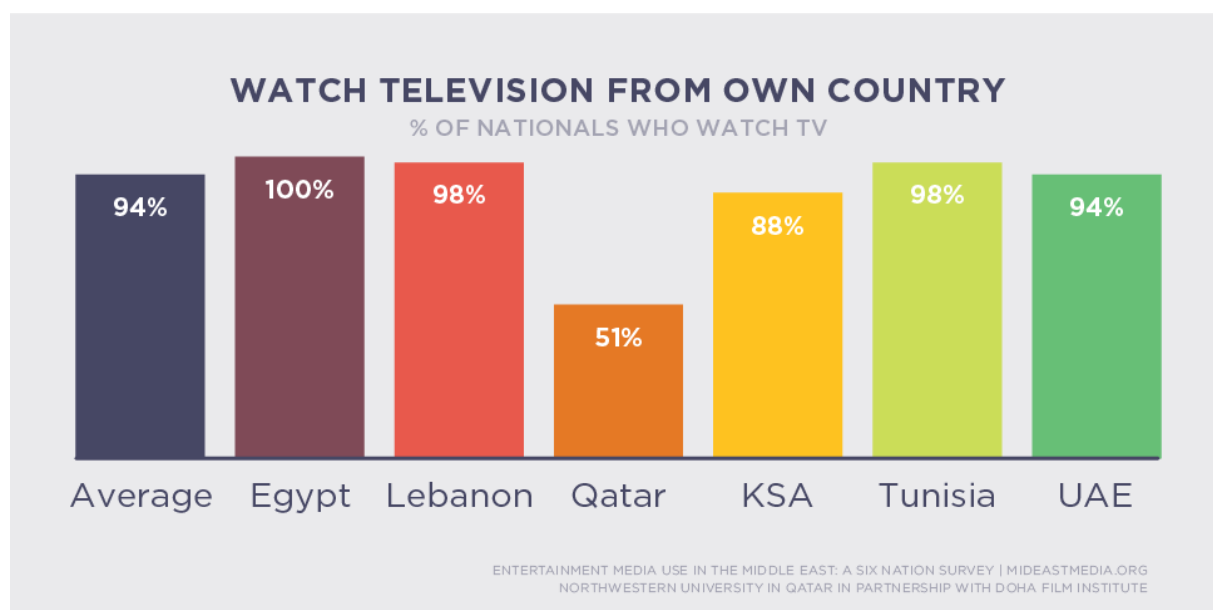
## REGIONAL SOURCES FOR TELEVISION PROGRAM CONTENT

Participants tend to watch TV programming produced in their own country most often; three-quarters of viewers in the MENA countries in the study watch TV content from their own country. Viewership of country-produced programming is near universal in Egypt, Lebanon and Tunisia and also common in Saudi Arabia (73%). Only about half of UAE residents watch entertainment TV produced in their country, and even fewer in Qatar (47%, 30%). UAE nationals are far more likely to watch entertainment TV from that country (94%), while only half of Qatari nationals watch Qatar-produced television for entertainment (51%), perhaps because fewer programs originate in that country.

Respondents were asked about their viewing habits for entertainment content from various areas in the region—Mashreq-Levant countries (Egypt, Lebanon, Jordan, Syria, Iraq), Maghreb countries (Morocco, Tunisia, Algeria) and Arab peninsula/Al Khaleej countries

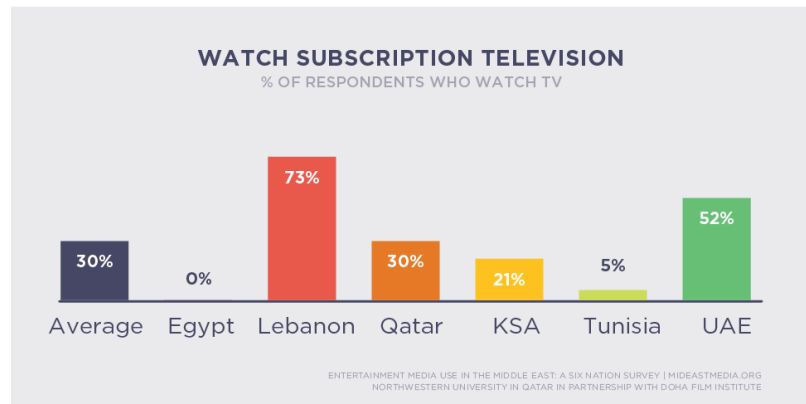
(Saudi Arabia, Kuwait, UAE, Qatar, Bahrain, Oman and Yemen)—as well as from around the world. In Saudi Arabia, respondents most often watch content from that country, but also from Mashreq-Levant countries as a whole, and also Maghreb countries. In Qatar, TV viewers watch entertainment programs from a variety of sources; they are more likely to watch TV programming originating within the Arab peninsula countries as a whole than in Qatar, and as likely to watch programs from the United States as the Arab peninsula. In the UAE, TV programs from the Mashreq-Levant countries and from India are almost as popular as those from the UAE itself. Turkish programming is fairly popular in Lebanon, but not nearly as popular as Lebanese programming.

Expatriates tend to watch entertainment TV from their own countries or regions, whether these regions are in MENA, Europe, U.S. or elsewhere in the world.



## FORMATS FOR WATCHING TELEVISION—FREE VS. SUBSCRIPTION TV

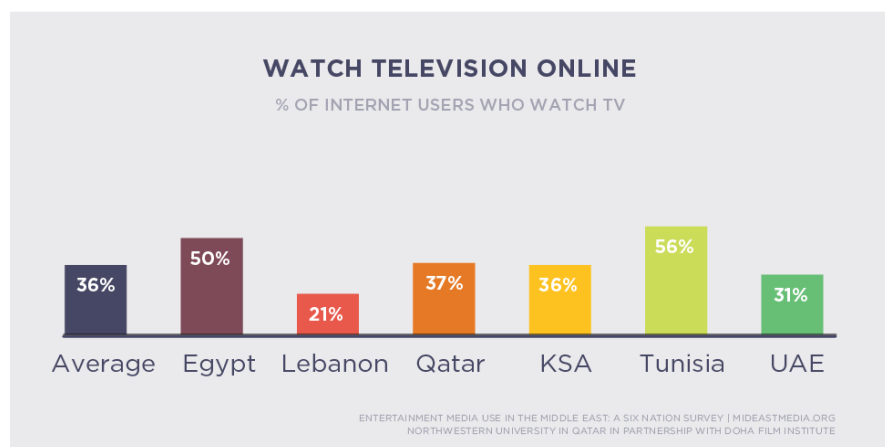
Free-to-air satellite TV is the most common format for watching television, followed by subscription TV (69% and 30%, respectively), although the incidence of each varies considerably by country. In Egypt and Tunisia, nearly all viewing is via free TV, and three-fourths watch free TV in Saudi Arabia. In contrast, only about half watch free TV in the UAE and Qatar (54% and 55%, respectively), and in Lebanon, use of subscription TV surpasses that of free television (73% vs. 43%).



The relative popularity of free and subscription TV programming is consistent among different age groups, but subscription TV is more popular among those with higher education levels. As might be expected, subscription TV is noticeably more popular among non-Arab expats. Western expats are considerably more likely to use subscription TV as free TV (55% vs. 32%). It is possible that programming they prefer to watch is only available by subscription.

## FORMATS FOR WATCHING TELEVISION—ONLINE TV

One-third of Internet users watch television shows online (36%). They are twice as likely to stream shows online as download them to a device (30% vs. 12%). Watching TV online is most popular among Internet users in Tunisia and Egypt (56%, 50%). Only one in five Internet users in Lebanon watch TV online. A quarter of



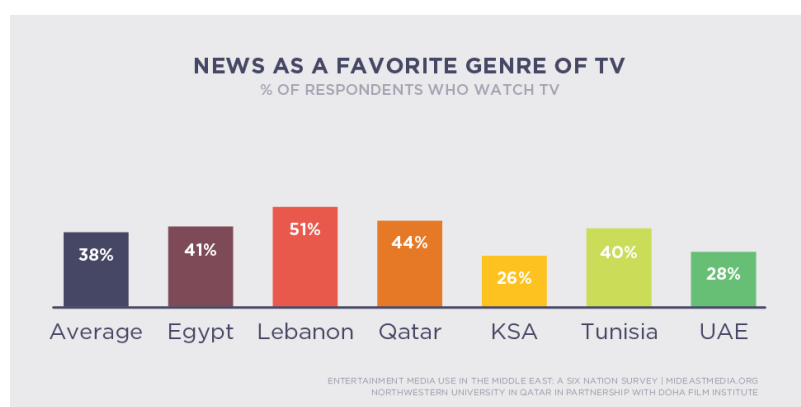
Internet users say they would pay to download a television series (23%). Those in Saudi Arabia are far more likely to pay to download TV shows, followed by the UAE—59% and 24% respectively—versus 10% or less in the other countries.

## FAVORITE GENRES OF TELEVISION PROGRAMMING

Comedy is the most preferred genre for television programming, as is the case with film. Half put comedy in their top three favorite genres; news and drama round out the top three (38% and 35%, respectively). Comedy is cited most often in Egypt and the UAE as their favorite form of entertainment on TV (66% and 59%), while news is more preferred than comedy, even as a form of entertainment, in Qatar (44% vs. 33%) and Lebanon (51% to 43%). Dramas have more appeal in Saudi

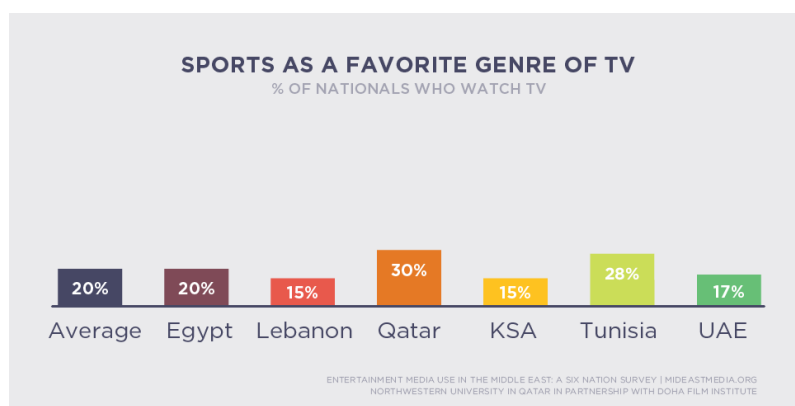
Arabia, the UAE and Egypt. Soap operas and sports are the next most popular forms of entertainment on TV (26% and 20%). Those in Lebanon, Egypt and Tunisia are more likely than others to put soap operas among their favorite genres. Those in Qatar and Tunisia are more likely than others to name sports as one of their favorites.

TV-watching preferences vary considerably by the viewer's background and country. For example, sports lovers are almost exclusively male, while women are more likely than men to watch soap operas (37% to 17%). Younger viewers are also more likely to watch sports. News is preferred more by men than women, and also by older viewers. European, U.S. and Asian expats are more likely to prefer comedy than other forms of entertainment, although news is important to them also.



## A FOCUS ON SPORTS

While fairly popular, watching sports on TV is not as popular as other genres such as comedy, news, drama and soap operas. One in five respondents name sports as one of their top three favorite genres of television. Those in Qatar and Tunisia are the most interested in sport (28% each), those in the UAE less so (11%). Sports programming is equally popular across ethnic groups in Qatar, although generally speaking, country nationals and Western expats show slightly more interest in sports than Arab and Asian expats.



As noted above, watching sports is almost exclusively a male behavior – 34% men vs. 4% of women prefer sports – and also more popular among young viewers (24% under 25 vs. 16% 45 and older). There are few differences in interest in sports by income or education level.



## WHEN AND HOW PEOPLE WATCH TELEVISION

Roughly half of respondents watch television programs at the scheduled broadcast time, while over a quarter watch a recorded version at a time of their choosing (28%). Another 12% do both equally. This behavior is broadly consistent among all sub-groups of the population.

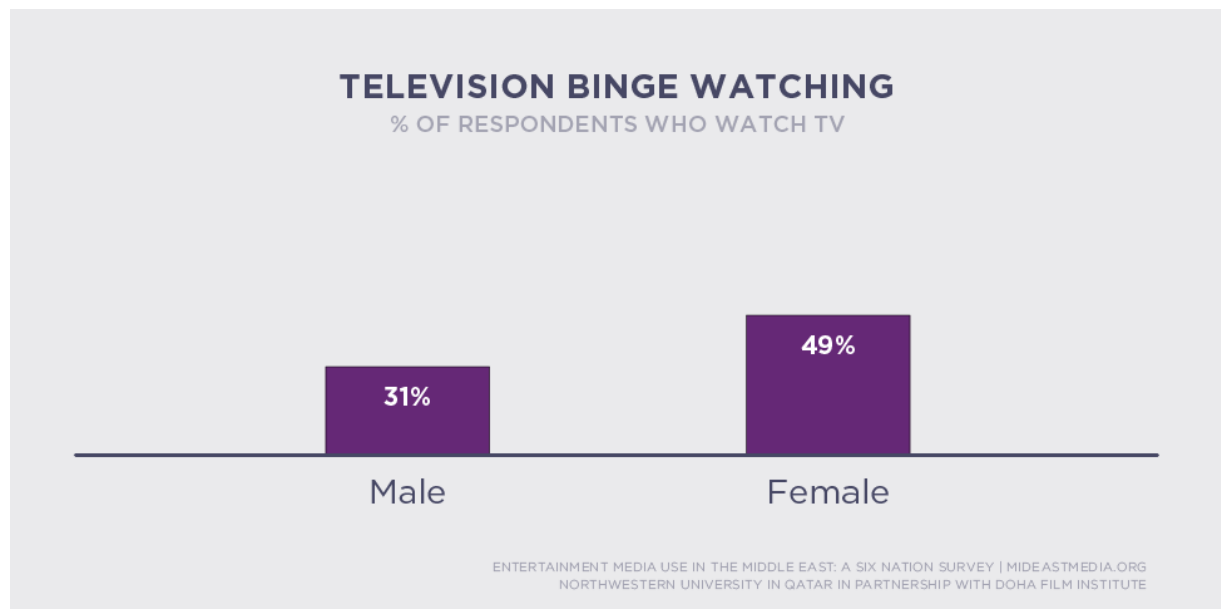
Additionally, four in ten report “binge watching” TV programming, watching multiple episodes in the same sitting. Binge watching is most common in Lebanon, undertaken by half of Lebanese (49%), and slightly less common among Egyptians and Tunisians (27% and 34%, respectively). About four in ten in Qatar, Saudi Arabia and the UAE admit to binge watching (45%, 43% and 41%, respectively). Western expats are the most likely to report binge watching, followed by Asian expats (58%, 49%).

Women are far more likely to binge watch than men (49% vs. 31%). Young viewers are also more likely to binge watch their favorite shows – 46% among those under 25 vs. 34% of those over 45.

A quarter of Internet users discuss TV shows online, but fewer have a “second screen experience” in terms of discussing the show online *while watching it* (27% and 6%). Residents of Qatar, Saudi Arabia and Tunisia are more likely to discuss TV shows online, about a third in these countries do so. There are few differences by sub-groups of the population.

Those who discuss TV online are more likely to do so via social media—reading and/or posting comments (50% and 41%, respectively)—than through official sites for a TV show such as the show’s website or a fan site (24% and 12%, respectively).

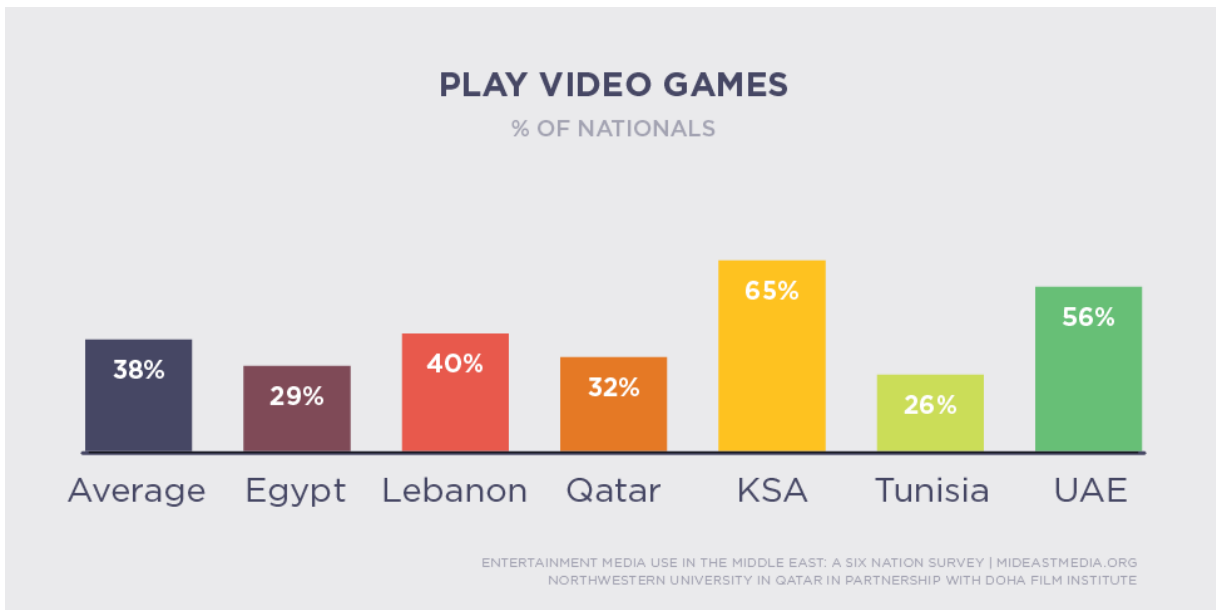
Fourteen percent of respondents report voting for a contestant on a reality or talent show. There is variability by country, though, with one in five casting votes in Saudi Arabia (22%), but almost no voting reported in Egypt and Tunisia (4% and 9%). Younger viewers are more likely to participate. The youngest age group (under 25) is three times more likely than those 45 or older to have placed a vote for a television show contestant (21% vs. 7%).





# Video Games





## SUMMARY

Four in ten people in the MENA region play video games. That is fewer than the number who consume films, television or music, but those who do play video games do so frequently. Games are more popular among men, younger individuals, non-Arab expatriates and those who have achieved a higher level of education and income. Those who play video games do so an average of five hours per week, and a quarter of gamers play more than ten hours a week. Gamers are more likely to say they play alone than with others, and those who do play with others are equally likely to do so online as offline.

Video games are the only entertainment medium in the region that is more likely to be consumed (played) in English than in Arabic. Driving/racing games are the most popular, followed by sports-themed games, war games and MMORPG (massively multiplayer online role playing games) such as World of Warcraft.

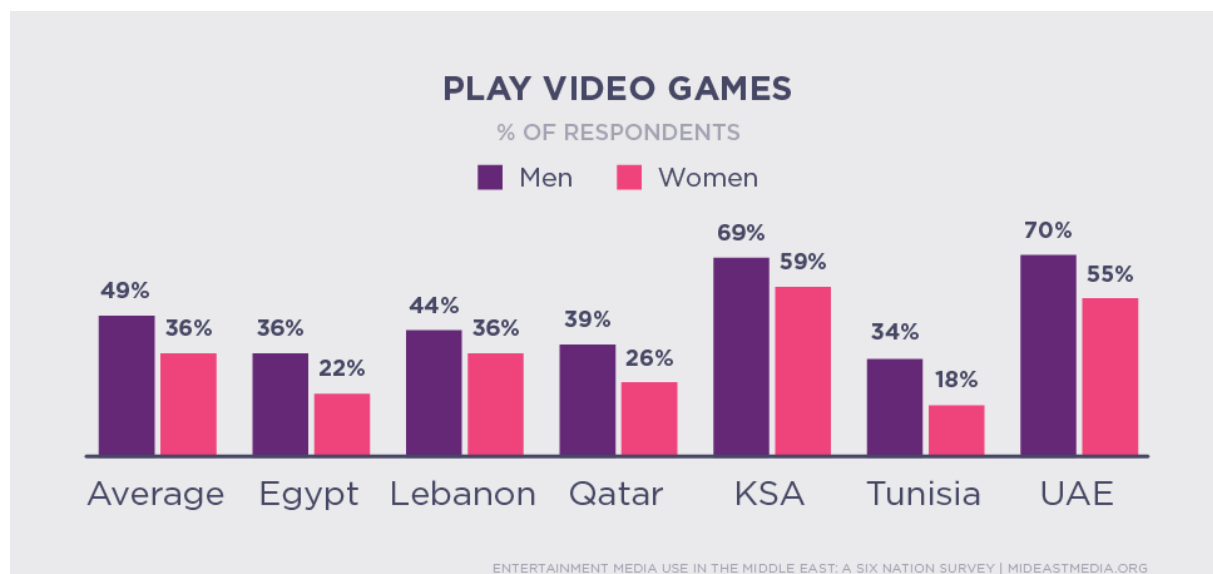
## POPULARITY OF VIDEO GAMES AND TIME SPENT PLAYING

About two-thirds in Saudi Arabia and the UAE play video games (65% and 63%, respectively), while closer to three in ten in Qatar and Egypt do so (33% and 29%, respectively). Four in ten play in Lebanon, and only a quarter play video games in Tunisia.

Video games are most popular with men and younger individuals. Nearly half of men play video games, compared with one-third of women (49% vs. 36%). Use of video games decreases with age; those under 25 are four times more likely to play videos games than those 45 and older (68% vs. 16%). Children are even more likely to play video games, as nearly four in ten children play on a daily basis (74% at all, 37% daily).<sup>1</sup> Education and income are also factors in

as with Westerners. Two-thirds of Western expats play video games (67%), compared with about four in ten Arab nationals and Arab expats (38% and 44%, respectively). Asian expats fall in the middle (54%).

Relatively few gamers play video games on a daily basis (14%), although those under 25 are more likely to do so (29%). This said, a quarter of those who play video games do so for at least ten hours each week—or between one and two hours a day. The typical (median) time gamers spend playing video games is five hours each week, but time spent playing video games differs considerably by country—gamers in less developed countries devote much more time to it. In Egypt, Lebanon and Tunisia, over a third of gamers play for



playing video games. More than half of those with a university education play video games, compared with one in ten of those with a primary school education or less (54% vs. 10%). Also, only a third of those in the lowest income quartile play video games compared with half of those in the highest quartile (33% vs. 49%).

Video games have not garnered as much popularity with Arabs in the MENA region

more than ten hours a week (39%, 35% and 36%, respectively), compared to just one in ten in the UAE. Saudi Arabia and Qatar fall in the middle (25% and 20%, respectively, play more than 10 hours per week).

Younger gamers also spend more time at it. Over a third of those under 25 spend at least ten hours each week playing video games (38%), compared to fewer than one in five of those over 25. Men typically

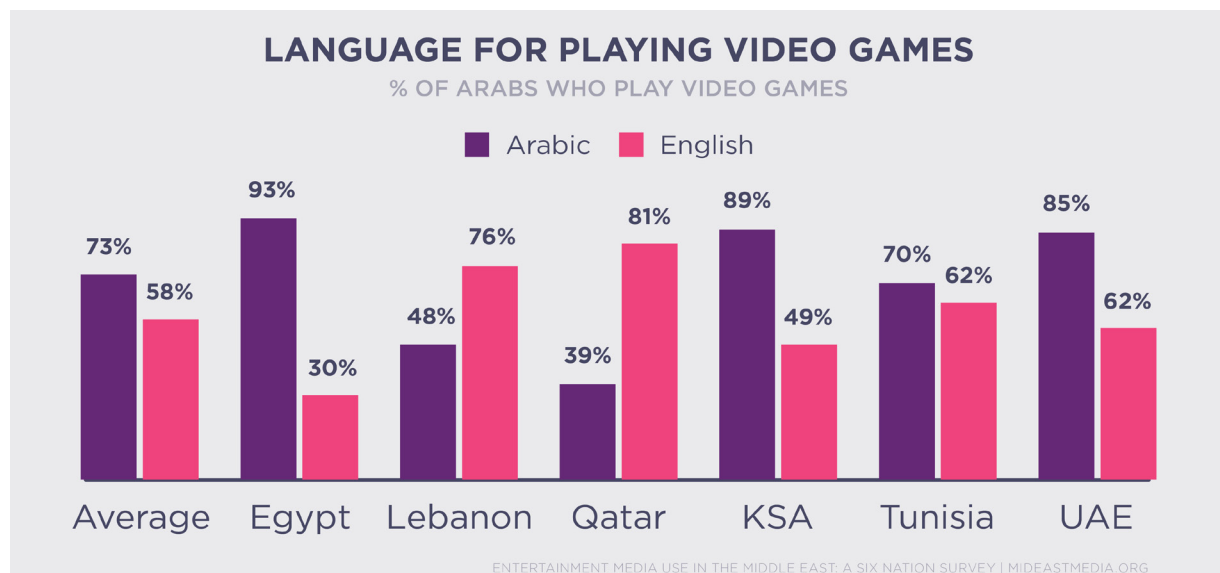
<sup>1</sup> Respondents that have a child under 18 in the household were asked about their children's consumption of media for entertainment; children were not interviewed.

spend more time playing video games than women – about two hours more each week. While non-Arab expats are more likely to play video games overall, they play for less time each week. Asian and Western expats play about three hours per week (median), compared with seven and five hours for nationals and Arab expats.

Playing video games is viewed as less

important for entertainment than other more general pursuits. A quarter of those in the MENA region describe playing video games as important to them for entertainment (27%). For comparison, 76% say watching television is important and 56% say listening to music is important. Among those who play video games, half say this is an important medium for entertainment.

## LANGUAGE OF VIDEO GAMES



Video games are played almost exclusively in Arabic and English, and are the only medium used more frequently in English than in Arabic across the region (67% English vs. 56% Arabic). Gamers in Qatar, the UAE and Lebanon are much more likely to play video games in English than in Arabic (85%, 81%, and 76%, English; 23%, 38%, and 48%, Arabic). Residents in Egypt and Saudi Arabia, on the other hand, are more likely to play games in Arabic than in English (93% and 74%, Arabic; 30% and

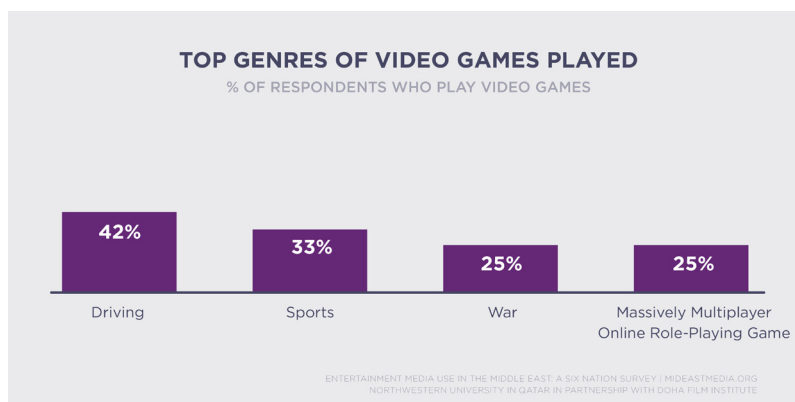
57%, English). Tunisians play video games in both languages equally—66% Arabic, 63% English—but are most likely to play in French (77%).

As with film and television, non-Arab expats play video games almost exclusively in English, with almost no game playing in Arabic. Arabs play video games primarily in Arabic, but a majority also plays games in English (Nationals – 73% Arabic, 57% English, Arab Expats – 73% Arabic, 67% English).

## TYPES OF GAMES PLAYED

Driving/racing games are the most popular genre in the MENA region—four in ten gamers play this genre (42%). Sports-related video games are also popular, with a third playing them overall. War-related games – including MMORPG (massively multiplayer online role playing games) such as World of Warcraft—are played by at least a quarter of all video game players.

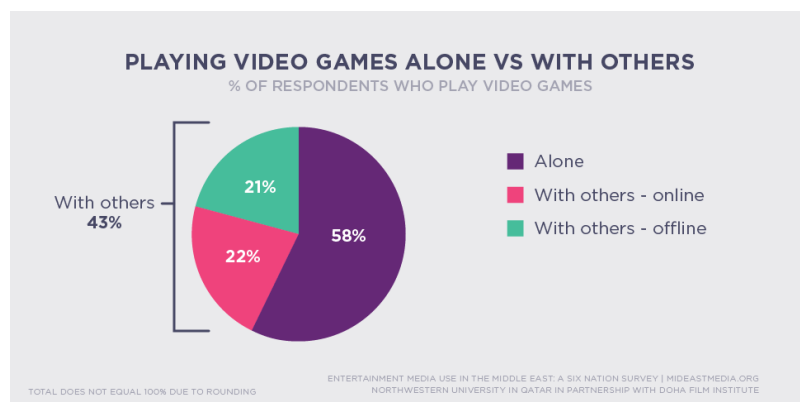
Men are more likely than women to play all types of video games except games in Arabic. Men are much more interested than women in sports games (43% of men; 18% of women), war games (33% of men; 14% of women) and driving/racing games (50% of men; 31% of women). American, European and other non-Arab expats show more interest than Arab nationals and expats in sports-related video games and war games.



## PLAYING GAMES ALONE VS. SOCIALLY

Video game players in the countries surveyed are more likely to play alone than with others. Of their time spent playing video games, gamers estimate 57.5% of this time is spent alone as compared to 42.5% of the time with others. Among those who play socially,

with others (70%) and do so more in person than online. Tunisians are equally as likely to play alone as they are to play with others. Non-Arab expats are much more likely than Arabs to play video games alone. Asian and Western expats spend three-fourths of their time playing alone, compared with Arab nationals who spend half of their time playing alone.



they are equally likely to do so online as offline. Gamers in the UAE and Egypt are more likely to play alone (80% and 65%, respectively) than with others. Lebanese gamers are more likely to play

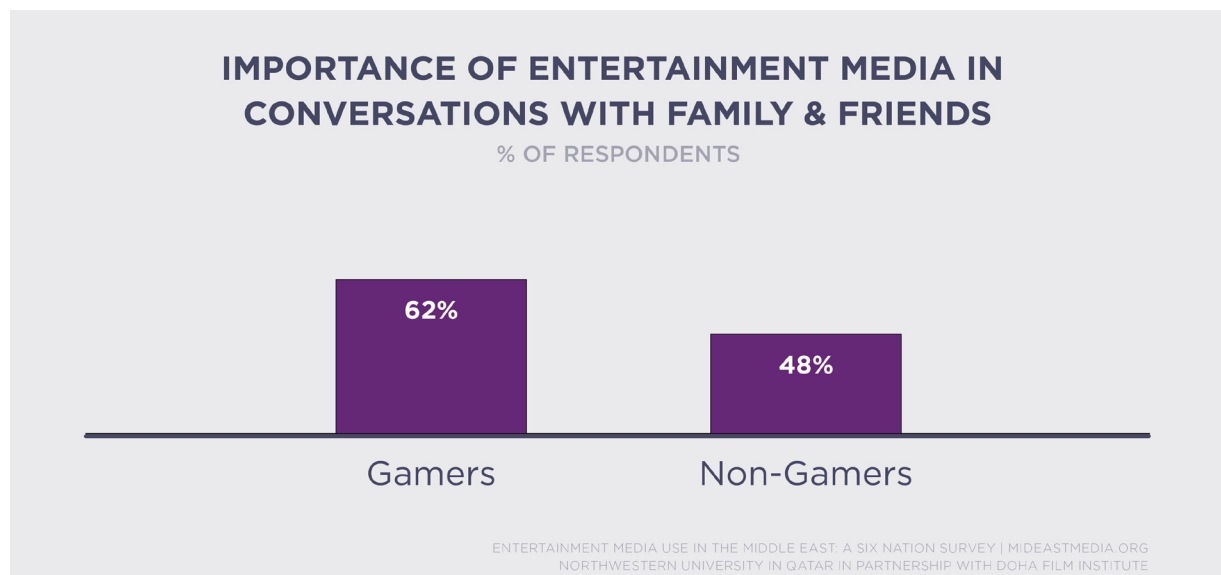
to do so (59% vs. 16%). Men are more likely than women to pay for games online (38% vs. 30%), and just 27% of the oldest group (45 and above) are likely to pay. Income is not a factor.

## GAMERS — BEHAVIORS AND ATTITUDES

Almost all gamers use the Internet, compared with only half of those who do not play (94% vs. 50%). Those who play video games are also more likely to engage in other forms of entertainment – watching films, listening to music, shopping, reading, exercising, etc.

Gamers are more likely than others to see the positive benefits of exposure to other cultures. They are more likely than non-gamers to agree that “people benefit from

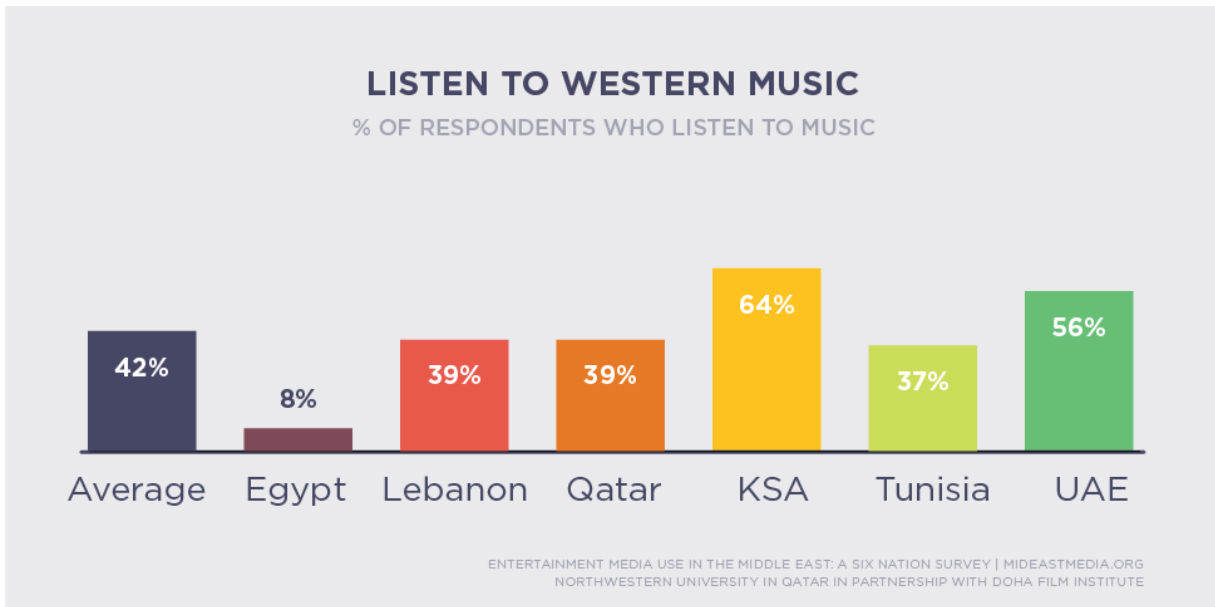
watching content from different parts of world” (71% vs. 63%), “entertainment media challenge rather than reinforce cultural stereotypes” (56% vs. 44%), and “in order for Arab entertainment to produce its best and most creative content, there should be limited censorship” (63% vs. 57%). Perhaps because they are more engaged with entertainment overall, gamers are more likely to agree that entertainment media plays an important role in their conversations with friends and family (62% vs. 48%).





# Music





## SUMMARY

Music is a pervasive and important source of entertainment, behind only television, and plays a particularly strong role in entertainment among young people. Those under 25 are more likely to listen to music than to watch TV on a daily basis, and are equally likely to say the two are “very important” for their entertainment.

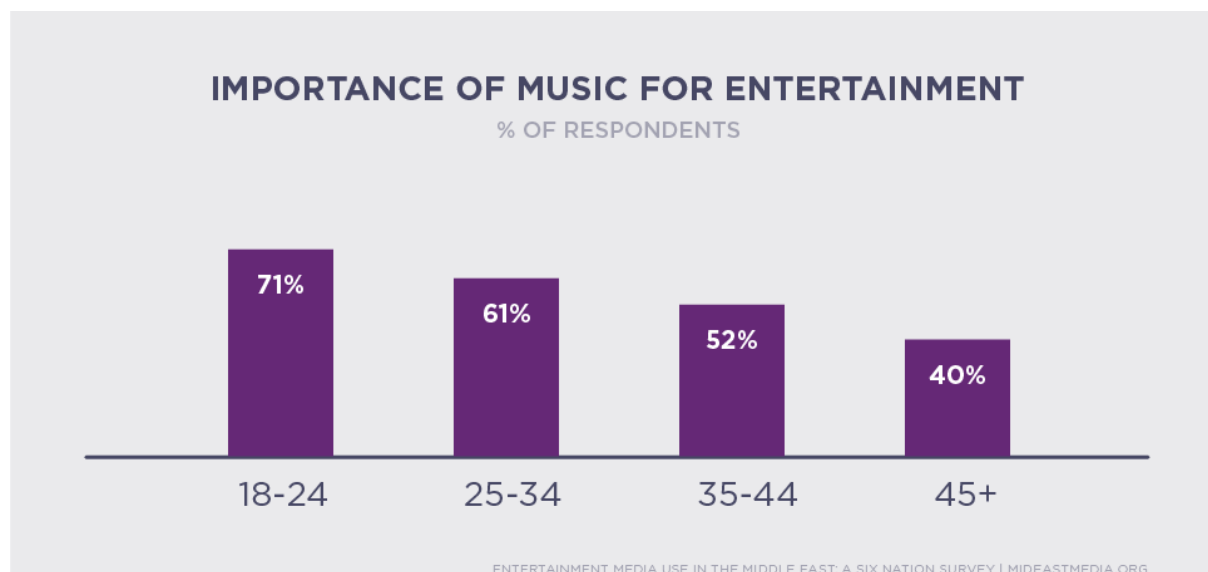
Music from the Arab region is listened to most frequently—Arabic Egyptian music in particular—although Western music is also popular. Three-fourths listen to Arabic music, two in five listen to Western music (77% vs. 42%). Overall, one’s national origin clearly drives music preferences.

## USE AND IMPORTANCE OF MUSIC

Almost everyone listens to music and half do so every day (84% and 48%, respectively), in addition, many listen several times throughout the day (26%). Music plays a major role for entertainment in all six countries in this study. However Lebanese and Tunisians are somewhat more likely to listen to music on a daily basis

respectively) than in the other four countries in the study.

While equally important to men and women, music is more important to younger people, and seemingly declines with age. Nearly three-quarters of those under 25 feel that listening to music is important,



(64% and 59%, respectively), while those in Saudi Arabia do not listen as frequently – a quarter listen daily. While nearly everyone listens to music, preferences of genre vary by sector of the population.

Music is very much a part of the daily lives of young people; 63% of under 25s listen to music every day, compared with one-third of those 45 and older.

Music plays a large role in entertainment overall. A majority of the participants in this study consider listening to music *important* for entertainment (56%). Music is a more important source of entertainment in Lebanon and the UAE (69% and 62%,

compared to a minority of those over 45 (71% vs. 40%). The importance of music also increases with the level of education of the listener, from a third of those with primary education to nearly two-thirds of those who have attended university (37%, 61%). Single people are more likely than those who are married to consider listening to music an important source of entertainment (71% vs. 50%). Listening to music is twice as likely to be seen as important by Western expatriates as by Arab expatriates (81% and 45%). Nationals and Asian expatriates fall in the middle (54%, 67%). This pattern is consistent among all countries with large expatriate populations: Qatar, Saudi Arabia and the UAE.

## ARAB MUSIC

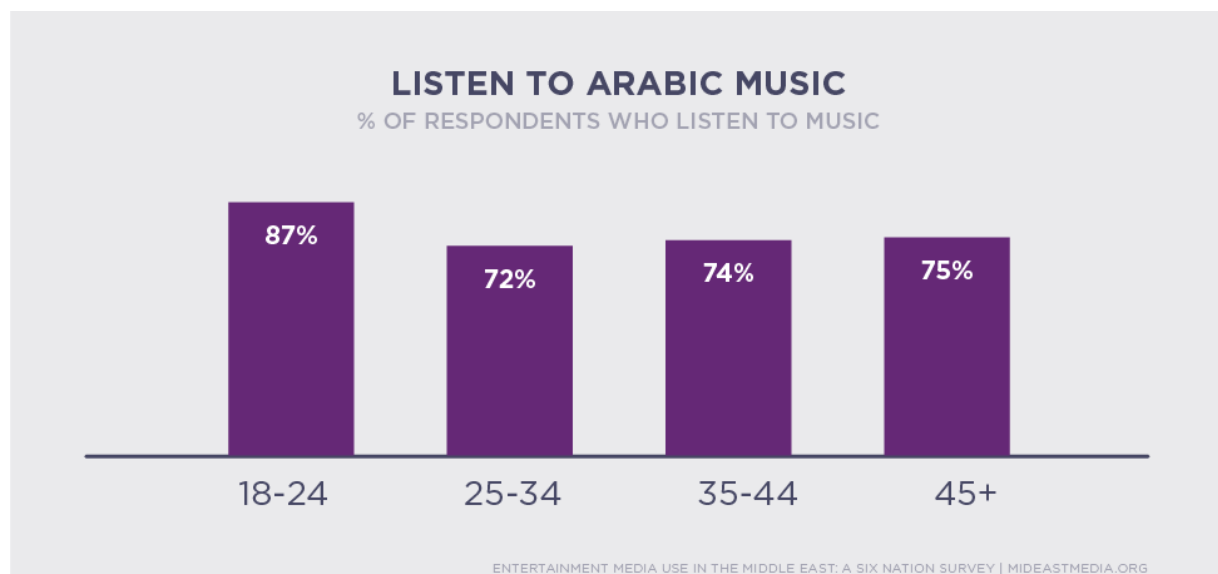
More than three-quarters of adults listen to Arabic music (77%). Preferences for genres within Arabic music often correspond to locality (for example, a preference for Arabic Egyptian music in Egypt, Arabic Lebanese music in Lebanon). As a whole, however, Arabic music is much more popular than Western music among all segments of the population, with the exception of non-Arab expats.

Listening to Arabic music is almost universal among nationals and Arab expats in all six countries in this study, while very few Asian and Western expats listen to Arabic music. Listening to Arabic music is equally popular among men and women, and more popular

Tunisia (75%, 61%, and 61%). It finds least resonance in Qatar and the UAE (24% and 38%), but is popular among UAE nationals if not Qatari nationals (63% and 31%).

Music listeners from Saudi Arabia and Tunisia have the most eclectic tastes in music from different parts of the MENA region, indicating enjoyment in all types of music of the region. Among those in Saudi Arabia, this broad interest in music includes Western music as well. Egyptians, on the other hand, listen almost exclusively to Egyptian music.

Lebanese music is heard by four in ten music listeners overall (41%), but its

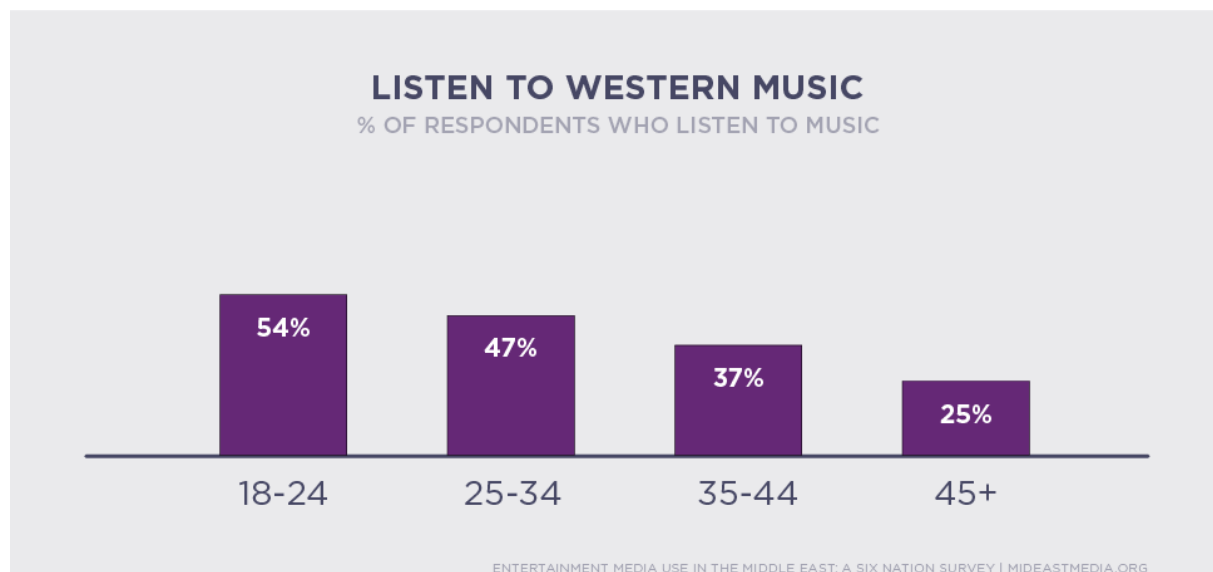


among younger listeners. Nearly nine in ten of those under 25 enjoy listening to Arabic music (87%), compared to three-fourths of other age groups.

Egyptian music is most popular overall (59% listen to this music). Egyptian music is, by far, the most popular type of music among Egyptians (98%), and music from Egypt is also enjoyed by a majority of listeners in Saudi Arabia, Lebanon, and

popularity is reported mostly in Lebanon itself, Saudi Arabia, and Tunisia (96%, 57%, and 43%, respectively). Very few listen to Lebanese music in the other countries in the study. Music indigenous to the “Khaleej,” Arabic for “Gulf,” is heard by a third of all listeners, being particularly popular in Saudi Arabia (35% overall vs. 78% Saudi Arabia), and enjoying a broadly similar level of popularity elsewhere except Egypt.

## WESTERN MUSIC



Western music, heard in one form or another (e.g., hip hop, pop, country), is listened to by nearly half of all music listeners in the MENA region (42%), but enjoys greater popularity in Saudi Arabia and the UAE (64% and 56%) than in the other four countries. Western music has earned little market penetration in Egypt, where fewer than one in ten listen to this music (and in fact any music except Egyptian). Western music is slightly more popular with men than women, and also with younger listeners. Listening to Western music is associated with those having higher levels of education; very few of those with primary education listen to Western music at all. Understandably, expatriates from the U.S. and Europe are committed listeners to Western music

(97%) and six in ten Asian expats listen to this music as well. Comparatively, a third of nationals and Arab expats in the six countries listen to Western music (34% and 37%, respectively).

No particular sub-genre of Western music dominates choices in the MENA region, with classical, hip hop, rap, and other popular music attracting audiences about equally. One-quarter of listeners in Saudi Arabia enjoy hip hop and rock music, while popular music is most enjoyed in the UAE (25%) and Western classical music in Lebanon (24%). Western and Arabic classical music attract similar size audiences across the six countries surveyed.

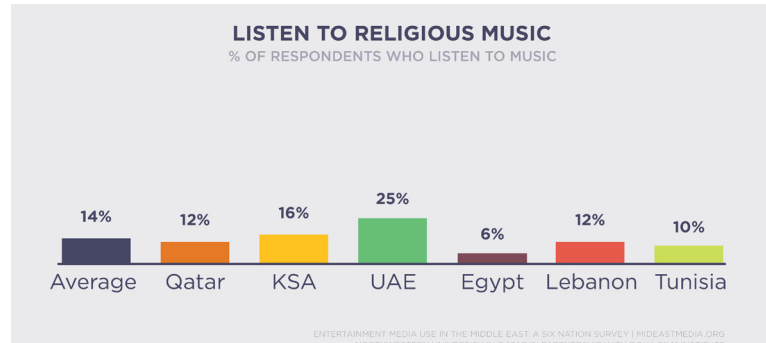
## RELIGIOUS MUSIC

About one in seven adults listen to religious music (14%), a proportion consistent among most sub-groups within the overall population. Those in the UAE are the most likely to listen to religious music, those in Egypt less so (25% vs. 6%).

Those who listen to religious music feel much more strongly about preserving their culture. Nearly nine in ten who listen to religious music feel more should be done to preserve cultural traditions, compared with (a still strong) three-fourths who do not listen to this music (88% vs. 77%).

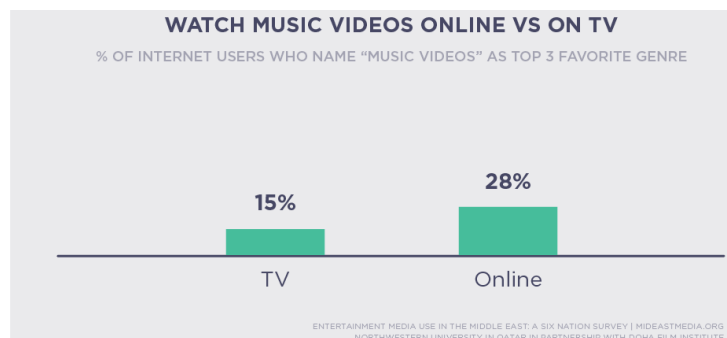
Those who listen to religious music also express somewhat stronger support for regulation and censorship of entertainment media. More than eight in ten of those who listen to religious music support more regulation of violent content and three-fourths support regulation of romantic content, compared with 73% and 67%, respectively, among those who don't listen to this music.

Additionally, 78% (vs. 71%) feel it is appropriate to delete content and 71% (vs. 67%) support an outright ban of material some people might find offensive. Seven in ten believe government oversight enhances the quality of entertainment (71% vs. 63% who don't listen to religious music).



## MUSIC VIDEOS

Twelve percent of adults say televised music videos are among their favorite TV programming. When asked about their favorite Internet content, three in ten Internet users listed music videos,

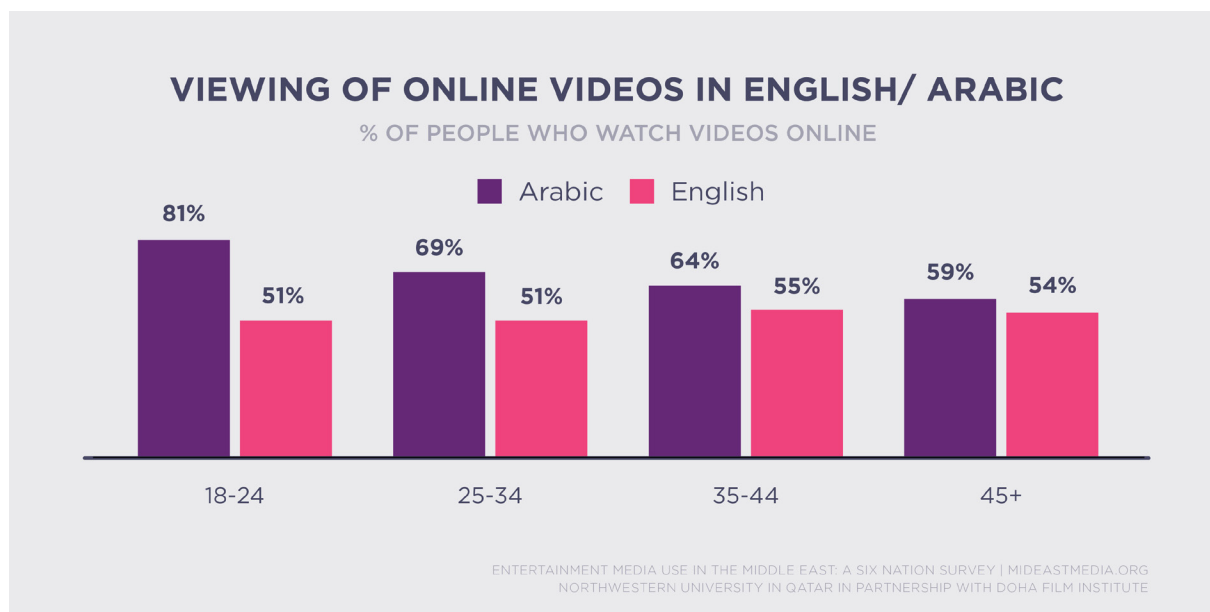


second in popularity only to comedy, and on par with online news (40% comedy and 30% for both music videos and news). Music videos are popular among all segments of the online population, but are more popular among younger individuals. About a third of those under 25 say music videos are among their favorite online content compared with 17% of those over 45.

Nearly thirty percent of Internet users indicate that they would be likely to pay to stream or download music. Those from Saudi Arabia are most likely to pay to stream or download music and other online content (films, television shows, sports events), followed by the UAE (49% and 33% likely to stream/download music, respectively). Fewer than one in five in the remaining four countries would be likely to pay to stream or download music.



# Internet and Social Media



## SUMMARY

Almost all Internet users go online – often on a daily basis – for entertainment. Many watch online videos (both professionally-produced and user-generated) and stream or download other video content such as films, television, and sports. Some download music, and a strong subset of the population plays video games with others in online platforms. Users also enjoy passing the time online.

Most residents of Gulf states are online (96% UAE, 87% Saudi Arabia, 85% Qatar), but access drops considerably among the other countries in the study (62% Lebanon, 47% Tunisia, 36% Egypt). Overall, younger residents are twice as likely to use the Internet as their older counterparts (86% under 25 vs. 40% 45 and older).

Unlike television, where Arabic-language content dominates, English is almost as popular as Arabic for watching videos online. Half of adults who watch online videos do so in English compared to approximately two-thirds who do so in Arabic (52% vs. 69%). Interestingly, while all age groups are equally likely to watch videos in English, younger viewers (those under 25) are much more likely to also watch in Arabic than any other age group (81%).

Viewership of online videos from one's own country is very high in Egypt, Lebanon, and Tunisia (watched by more than 8 in 10 in these countries), but few residents in Qatar watch videos from that country; even Qatari nationals are not likely to watch videos produced in Qatar (18% all Qatar residents, 29% Qatari nationals).

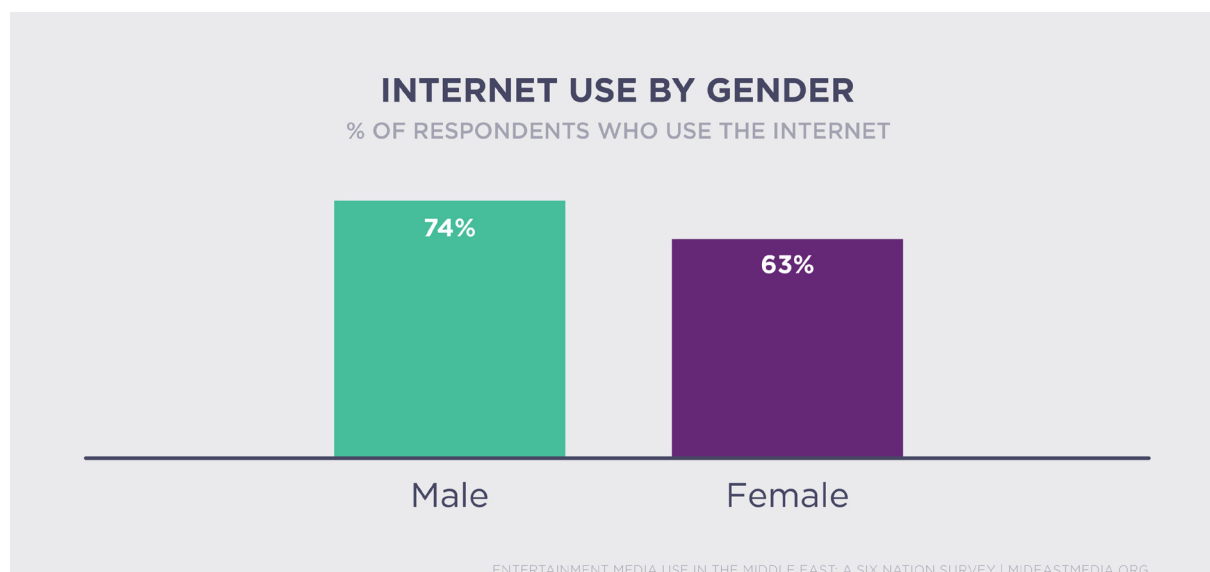
Four destinations account for most social network use in the countries surveyed: Facebook is the clear leader, followed by Twitter, Google+, and Instagram. More percentages for these networks are provided deeper in this chapter. More than nine in ten Internet users are on Facebook in five of the six countries covered in this study. Fewer Internet users are on Facebook in Qatar overall (70%), and only a third of Qatari nationals (36%). Qatari citizens are more likely to use Instagram than Facebook (46%) and as likely to use Twitter (37%).

*This chapter focuses primarily on using the Internet for watching various kinds of video content, and for social networking. All information presented in this chapter apart from "Internet use" is among Internet users only.*

## INTERNET USE

Internet use is widespread among the MENA countries covered in this study, but is by no means evenly distributed between these countries. Overall, more than two-thirds of adults in this study use the Internet (69%). Access to the Internet is highest in the Gulf states. Nearly all adults have access in the UAE (96%) and Internet penetration is also

university education use the Internet, while very few of those with just a primary education do so (95% vs. 16%). Three-quarters of those with children under 18 in the household use the Internet, compared to about two-thirds of those without children (75% vs. 62%). Among those in households with children, the children are



very high in Saudi Arabia and Qatar (87% and 85%, respectively). In Lebanon, less than two-thirds use the Internet, and only a minority of those in Tunisia (62% and 47%, respectively). Use is, by far, the lowest in Egypt (36%).

Three-quarters of men use the Internet, considerably more than the two-thirds of women who do so (74% vs. 63%). Younger people are much heavier Internet users than older individuals. Nearly nine in ten of those under 25 are on the Internet, compared to a minority of those 45 or older (86% vs. 40%).

Internet use increases dramatically with education; nearly all of those with a

often as likely to be online as their parents – two-thirds of the children use the Internet (66%).<sup>1</sup>

Nationality plays only a moderate role in Internet use in the countries with an expatriate population, as the large majority of all groups in these countries use the Internet. Almost all U.S. and European expatriates use the Internet; Internet use is also near universal among all nationalities in the UAE. In Qatar, though, 78% of Qatari nationals use the Internet, compared with 84% of Arab expats, 91% of Asian expats and 100% of Western expats. In Saudi Arabia, about 85% of nationals and Arab expats use the Internet.

<sup>1</sup> People that have a child under 18 in the household were asked about their children's internet use; children were not interviewed.



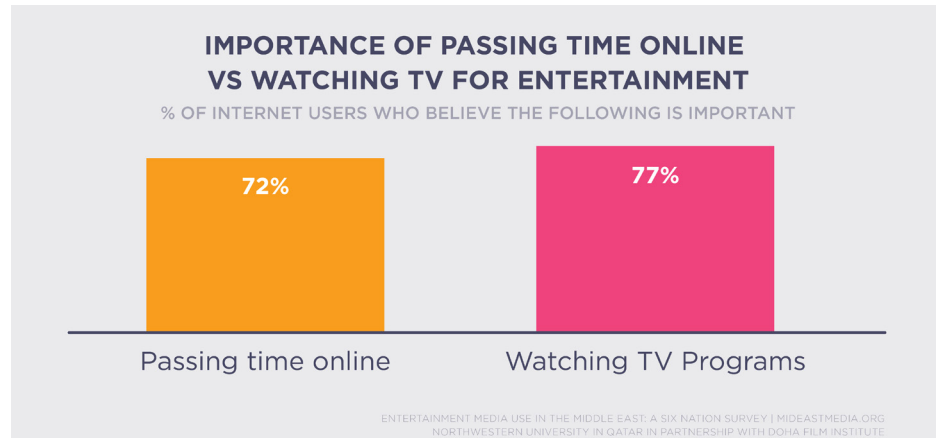
## LEISURE TIME ONLINE

Passing one's time online is consistently popular among most segments of population in the study. Almost all Internet users in the region spend time online for entertainment (96%) and the majority go online on a daily basis (59%); a third several times a day. Furthermore, three-fourths say spending time entertaining themselves online is important (72%), and consistently so across Internet users in all six countries.

Internet users in Lebanon pass the most time online for entertainment purposes – 83% are online daily – followed by Qatar (73%). Six in ten in Egypt and Tunisia spend time online daily. Fewer than half of those in Saudi Arabia and the UAE say they pass the time online for entertainment on

a daily basis (46% and 43%, respectively).

Passing one's time online is more a part of everyday life among younger Internet users—and more vital to their entertainment—than for older users. Two-thirds of those under 25 are online daily compared with half of those 45 and older (68% vs. 52%),



and eight in ten younger users say this is important for entertainment versus two-thirds of older users (79% vs. 65%).

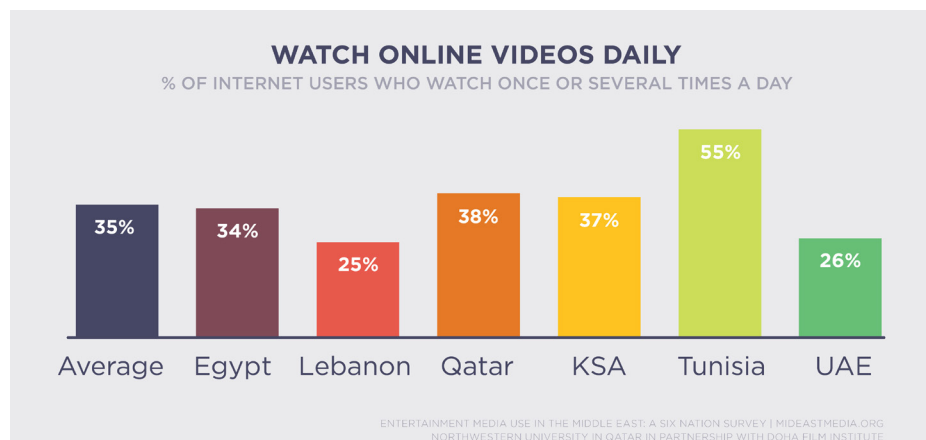
## WATCHING VIDEO CONTENT

A majority of Internet users say accessing Internet sites with emphasis on video content, such as YouTube, Hulu and Istikana, is important to them for entertainment (58%) – a claim borne out by the fact that

nearly nine in ten watch videos online (88%), and a third do so daily (35%).

These sites are important for entertainment in all six countries, slightly more so in Saudi

Arabia and Tunisia (68% and 64%, respectively), and less so in Lebanon (44%). More than half of Tunisians watch online videos daily (55%), which is much more often than any other country. About a third of Internet users in Qatar, Saudi Arabia,



and Egypt watch online videos every day. Daily viewing of videos is less common in Lebanon and the UAE (25% and 26%, respectively).

Men are more likely than women to say online videos are important for their entertainment (61% vs. 55%). Younger Internet users watch videos more often and consider them more important for entertainment than do their older counterparts. Those under 25 are almost twice as likely as those over 45 to watch online videos every day (44% vs.

24%), and two-thirds of younger users say they are important for entertainment versus half of older users (66% vs. 49%).

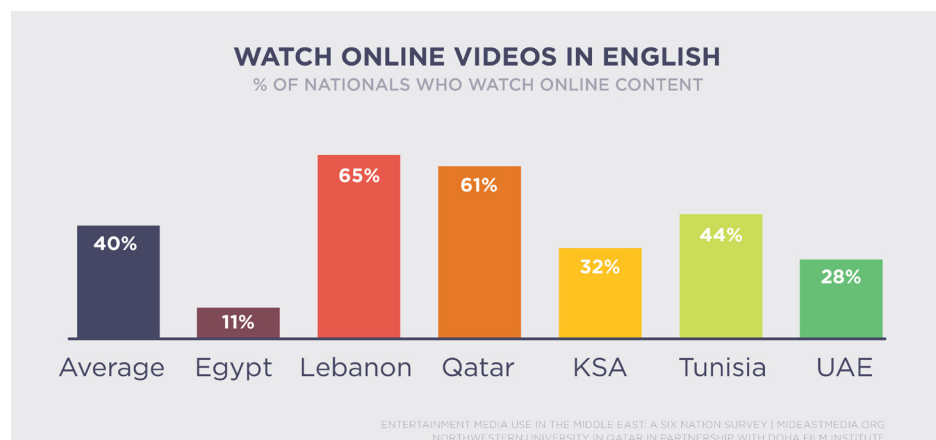
Those who use one form of media for entertainment are also more likely to use other forms of entertainment. Thus, those who watch online videos are also more avid consumers of other forms of offline entertainment such as watching movies, listening to music, playing video games, reading, and physical activities like shopping and exercising.

## LANGUAGES OF ONLINE VIDEOS

English is almost as popular as Arabic for watching videos online, perhaps due to the amount of English content available on the Internet and the ability to access it. Half of those who watch online videos do so in English compared to approximately two-thirds who do so in Arabic (52% vs. 69%). Online videos are similar to video games in this respect, in that both English and Arabic are common. In fact, more people play video games in English than Arabic (67% vs. 56%). In comparison, the Arabic/English distinction is much more pronounced for television content, of which only a third watches in English compared with eight in ten who watch in Arabic (30% vs. 81%).

There are, though, wide variations in language preferences by country – for online videos as well as other media. In Egypt, nearly everyone watches videos in Arabic and only one in ten watches in English. In Saudi Arabia, Lebanon and Tunisia, Arabic is preferred—about eight in ten watch in Arabic—but many also watch in English. English videos edge out Arabic in Qatar and the UAE, but this is driven by

the ethnic make-up of these countries. In Qatar, eight in ten non-Arab expats watch videos in English and only one in ten in Arabic, while Qatari citizens and expats are only slightly more likely to watch videos in Arabic than English (8 in 10 watches in



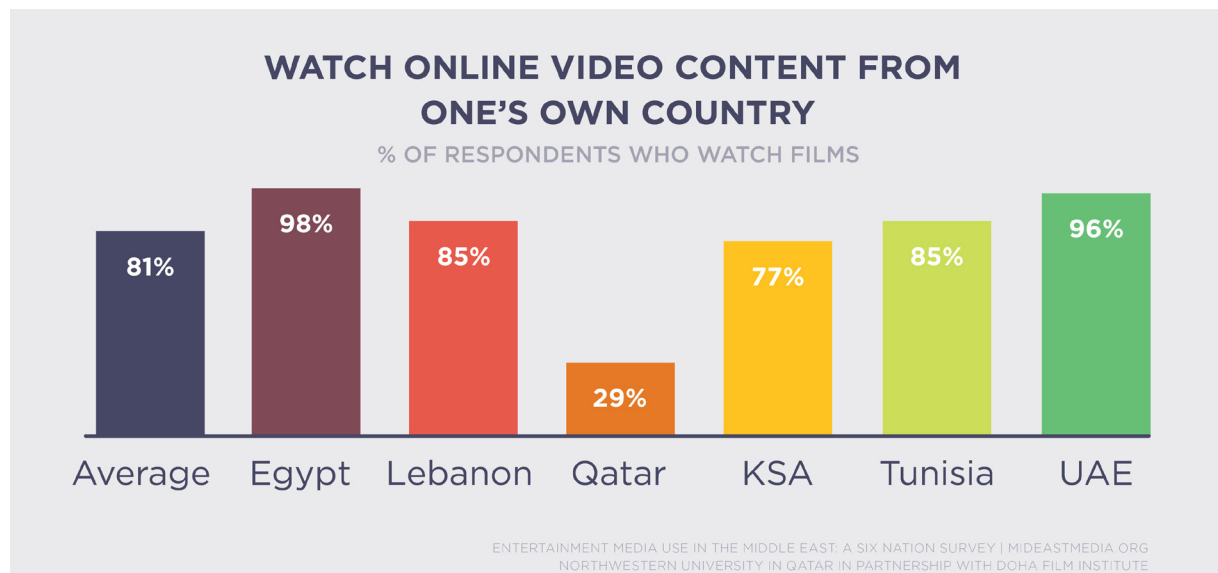
Arabic, 6 in 10 watches in English). There is a greater division among Arabs and non-Arabs in the UAE. Among online video viewers in this country, all non-Arab expats watch videos in English and almost none watch in Arabic, while almost all Arabs in the country (nationals and expats) watch videos in Arabic and two in ten watch in English. Nearly two-thirds of Indians (within the Asian expat population) watch Hindi videos and nearly two-thirds of Tunisians watch French videos online (63% and 64%, respectively).

## REGIONAL SOURCES FOR VIDEO CONTENT

The source of online videos watched varies greatly by country. Viewership of online videos from one's own country is very high in Egypt, Lebanon and Tunisia (watched by more than 8 in 10 in these countries), and also common in Saudi Arabia (64%). Less than half of UAE residents watch online video produced in their country (48%), and very few residents in Qatar watch video from that country (18%), but viewership is strongly linked with nationality. Most UAE

and Saudi nationals watch videos from their own country, while very few non-Arab expats do. In Qatar, though, even nationals are not likely to watch videos produced in the country (29%).

Online video content from the US is also very popular in Lebanon, where half of viewers watch such material (53%), and nearly half of Tunisians watch European videos (45%).



## PREFERRED ONLINE CONTENT

As with film and television, comedy is the most preferred format of online content. Four in ten viewers put comedy in their top three favorite genres; music videos and news round out the top three (30% each). Sports and drama are the next most popular forms of online entertainment (24% and 20%, respectively). Music videos are an equally popular genre in all countries except Qatar, where only 19% prefer this genre. Comedy is cited most often in Egypt and Tunisia as their favorite form of online entertainment (54% and 47%, respectively). As with television, news is more preferred than comedy in Qatar, and two in five Egyptians also show a preference for

news (42% and 44%, respectively).

There are a few other notable distinctions in content preferences by country. Nearly 25% of people in Tunisia look for documentaries and public commentary online, compared with less than one in five throughout the region. One in four in the UAE values content related to food and cooking, and one in four in Saudi Arabia prefers children/family content online—this compared with less than one in five overall. In Qatar, documentaries and religious content are among the most preferred online material,

with a third of Arab expats in the country looking to the Internet for religious and spiritual videos, compared with 13% of all online video viewers. Online interests are quite varied in the UAE and Saudi Arabia, where just about every genre of content is named as a “favorite” by at least one in ten residents.

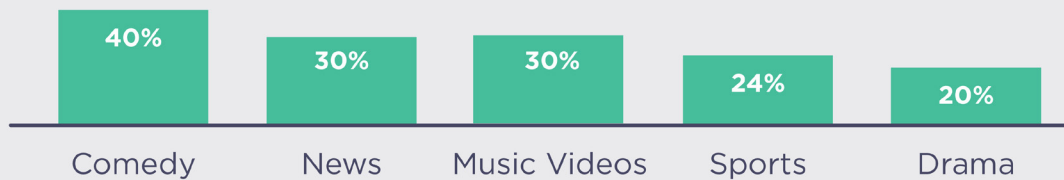
Preferences for online content also vary across demographics. Men watch more news and sports online while women like content about food/cooking and home improvement. Younger viewers are more

likely to enjoy comedy, music videos, sports, and game shows online, while older viewers prefer news and religious/spiritual content.

Western expats are less likely than other groups to say comedy is one of their favorite genres for online content (although they still enjoy comedy). Arab and Asian expats are the most likely to prefer watching news online, while nationals and Western expats are more likely to say they like watching sports online. Nationals are also more likely to name religious/spiritual content as a favorite genre.

## TOP 5 FAVORITE GENRES FOR ONLINE CONTENT

% OF INTERNET USERS



ENTERTAINMENT MEDIA USE IN THE MIDDLE EAST: A SIX NATION SURVEY | MIDEASTMEDIA.ORG  
NORTHWESTERN UNIVERSITY IN QATAR IN PARTNERSHIP WITH DOHA FILM INSTITUTE

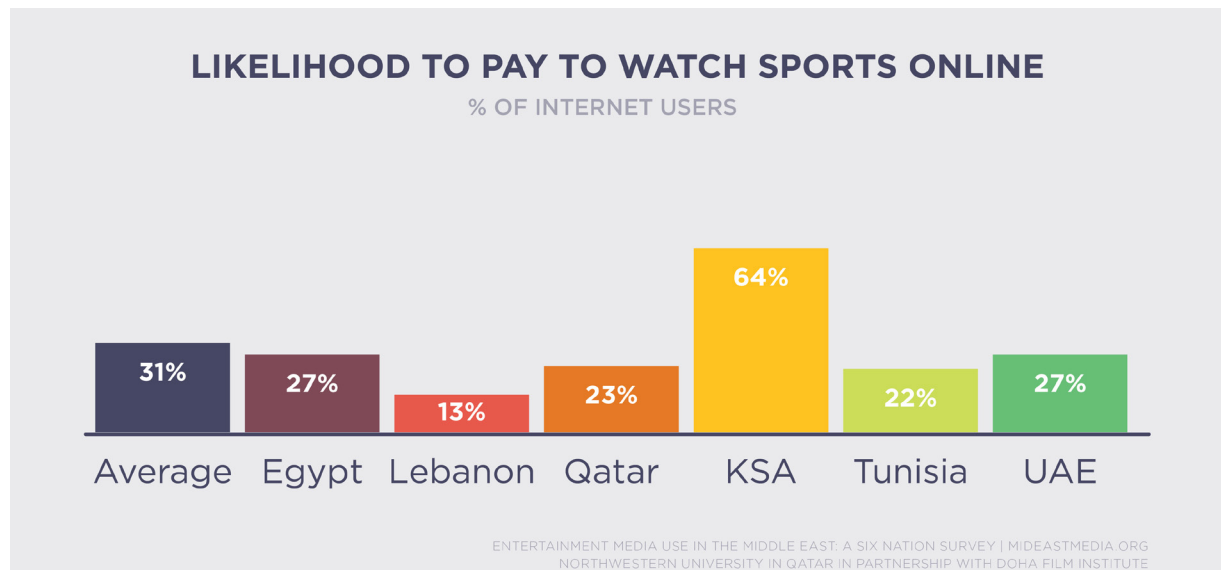
## SPORTS ON THE INTERNET

A quarter of Internet users in the region who watch online videos consider sports one of their favorite online genres (24%). This jumps to three in ten among Egyptians, Lebanese, and Tunisians, and is lowest in the UAE where only 15% cite watching online sports as a preference. Watching online sports is almost exclusively preferred by men (37% vs. 7% of women). Younger viewers (under 25) are also more likely to prefer sports online (27%) as well as those with less education (33% of those with a primary school education).

A third of Internet users indicate being likely to pay to stream or download sporting events (31%). This is similar to

other types of online content. Likelihood to pay differs more by country than nationality, although Asian expats are generally less inclined to pay for online sports and other content. Men are much more likely to pay for sports content than women (40% vs. 18%) and those with more education are also more likely to pay to stream or download sporting events.

About one in seven Internet users make comments about sports online (15%). This is consistent with online sharing about other topics such as films, television, and news. Those in Saudi Arabia and Tunisia are more likely to talk about sports online (27% and 24%, respectively), while very few Lebanese



interest in paying to stream or download video games and films (35% and 33%, respectively), and greater than interest in paying for music and television streams or downloads (28% and 23%, respectively). Those in Saudi Arabia are the most likely to pay to stream or download sports, while those in Lebanon are the least likely (64% vs. 13%), a pattern that holds true for likelihood to pay to stream or download

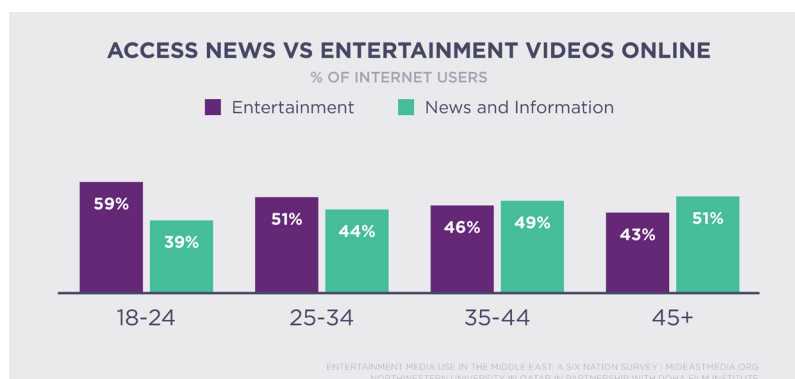
comment online about sports (5%), or any other topic. Fully half of Western expats in Saudi Arabia discuss sports online, but the same pattern is not seen in Qatar and UAE, where online sports comments are similarly low across nationalities.

Men more frequently discuss sports online (23% vs. 5% of women), as do those with no more than a primary school education (23%).

## NEWS VS. ENTERTAINMENT ONLINE

When asked about the overall time spent online accessing videos about news versus entertainment, entertainment has the slight edge. Entertainment accounts for about half of the time spent accessing online videos (49%) vs. 43% of the time spent accessing news videos. This pattern is generally consistent across countries except Qatar, where considerably more time is spent accessing online videos for news rather than entertainment (50% vs. 36%). This follows an overall preference for news over entertainment in Qatar reported earlier. All nationalities in Qatar spend more time accessing online videos for news rather than entertainment purposes.

Women are more likely to go to online to watch videos for entertainment, while men spend their time equally between news and entertainment videos. Internet users under 25 spend more time online with entertainment video than news (57% vs. 36%), while the opposite is true for the oldest age group—those 45 and older (40% entertainment, 49% news).

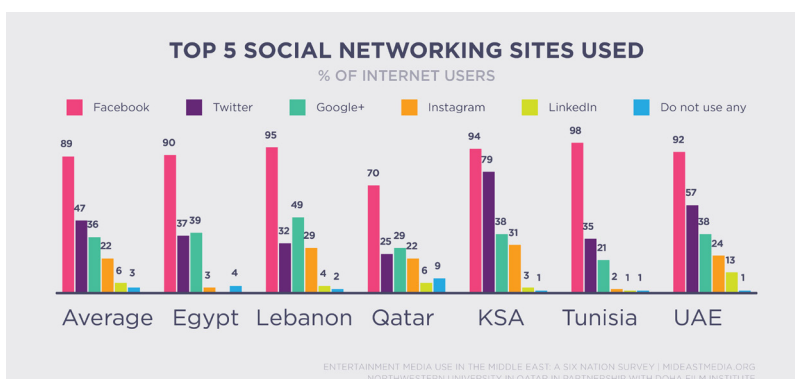


## SOCIAL NETWORKS

Four destinations dominate social network use in the countries surveyed: Facebook is the leader, with a distant second of Twitter, followed by Google+, and Instagram. At least seven other social networks are used in the region, but none of them by more than one in ten. LinkedIn—a popular social network in the United States for instance—is used by very few in the MENA region overall (6%), but slightly more in the UAE (13%), the country with the greatest Internet penetration. All other social network sites – including some, like Tumblr and Flickr, with acceptable name recognition in other parts of the world – are used by few people in the six countries covered in the study.

Facebook is, by far, the most popular social network in the MENA region, used by nearly twice as many Internet users as Twitter, its nearest rival. More than 90% of Internet users are

on Facebook in five of the six countries covered in this study. Only in Qatar is Facebook used by fewer than three-quarters of those on the Internet (70%), driven by very low use among Qatari nationals. Only a third of Qatari citizens use Facebook, and they are considerably more likely to use Instagram (46%) and as likely to use Twitter as Facebook (37% and 36%, respectively). Facebook has much more popularity among expats living in Qatar (75% Arab, 85% Asian, and 87%





Western expats). Facebook use is equally strong across nationalities in Saudi Arabia and the UAE, although slightly lower among Asian expats overall. Among social network users, Facebook is consistently the most appealing to all sub-groups in the overall population, as well as across all levels of education.

Twitter is used by about half of all Internet users in the survey, with much heavier use in Saudi Arabia and the UAE than elsewhere (79% and 57%, respectively). Overall in the region, Twitter is much more popular with U.S. and European expats than those with Arab origins or Asian expats (70%, 48%, and 35%, respectively). However, there are country variations. In the UAE, Western expats use Twitter more than all other residents (81% vs. 57%). Twitter is equally popular among all groups in Saudi Arabia.

Twitter is more popular with younger users. The majority of those under 25 use Twitter (57%) compared with a third of those 45 and older (32%). Those with more education are also more likely to use Twitter.

Google+ has enjoyed modest success in the

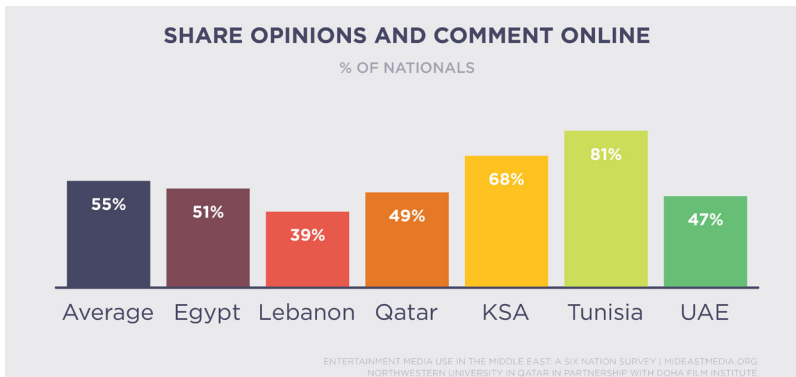
MENA region, attracting about a third of Internet users (36%). It is more successful in Lebanon than in the other countries in this study, as half of Lebanese Internet users access Google+, but less so among Internet users in Tunisia (21%). Google+ has strong popularity among non-Arab expats in all three Gulf states, less so among Arab nationals and expats. As with other social networking sites, Google+ use is most popular among the youngest age group (under 25) and the most educated (those with university degrees).

Instagram is used by about a fifth of Internet users in the survey, but is essentially not used at all in Egypt or Tunisia. Instagram is more popular with younger users – with very little penetration among those 45 or older – and is much more likely to be used among those with university degrees. Nationals in the UAE and Qatar are more likely to use Instagram than any other nationality (49% and 46%, respectively). Instagram is the most used social networking site among Qatari nationals—even above Facebook. On the whole, Asian expats are less likely to use Instagram; only about one in ten do so.

## ONLINE SHARING

A large number of Internet users share their opinions online; fewer than half say they never do (43%). Those in Lebanon are much less likely to share their opinions online (61% say they never do), while most Tunisian Internet users do share (only 16% never do). Men, those under 35, and those with less education are more likely to share their opinions online.

One in five comments on online videos. After that, an equal number—about one in seven—are likely to comment on user-generated content, sports, television, news, films, and reality shows. Men are more likely than women to discuss sports and news online—two topics they are more likely to follow online overall.

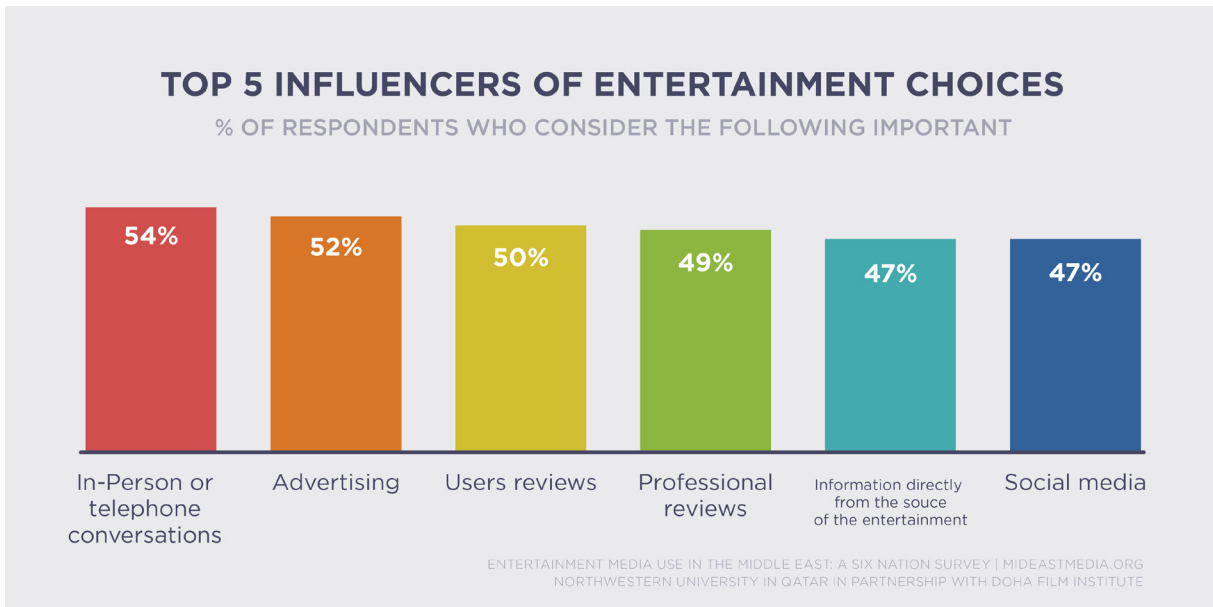


Younger users, those with a primary school education and country nationals talk more about online videos and user-generated content than their older and more educated counterparts, respectively. Western expats are more likely than others to discuss sports and television programming online.



# Content Choices





## SUMMARY

We live in an age when volumes of information are available in wide variety of formats about any topic we can think of, including, of course, entertainment. In this survey we find that residents in these MENA countries turn to a multitude of sources when forming opinions about entertainment, including personal and professional opinions, promotional content, and information in both digital and traditional formats.

Among Internet users, social media are the mostly likely to have an influence on entertainment choices, described as important by nearly two-thirds of Internet users in the six countries covered in the study (64%). Notably, three-fourths of Internet users in Saudi Arabia and the UAE say social media are important entertainment influencers (74% and 70%, respectively).

More than half of respondents, though, consider a wide variety of other sources important in informing their entertainment choices: word-of-mouth (whether in person, on the telephone, or digitally), user reviews and professional critiques, advertising, and other information directly from the source.

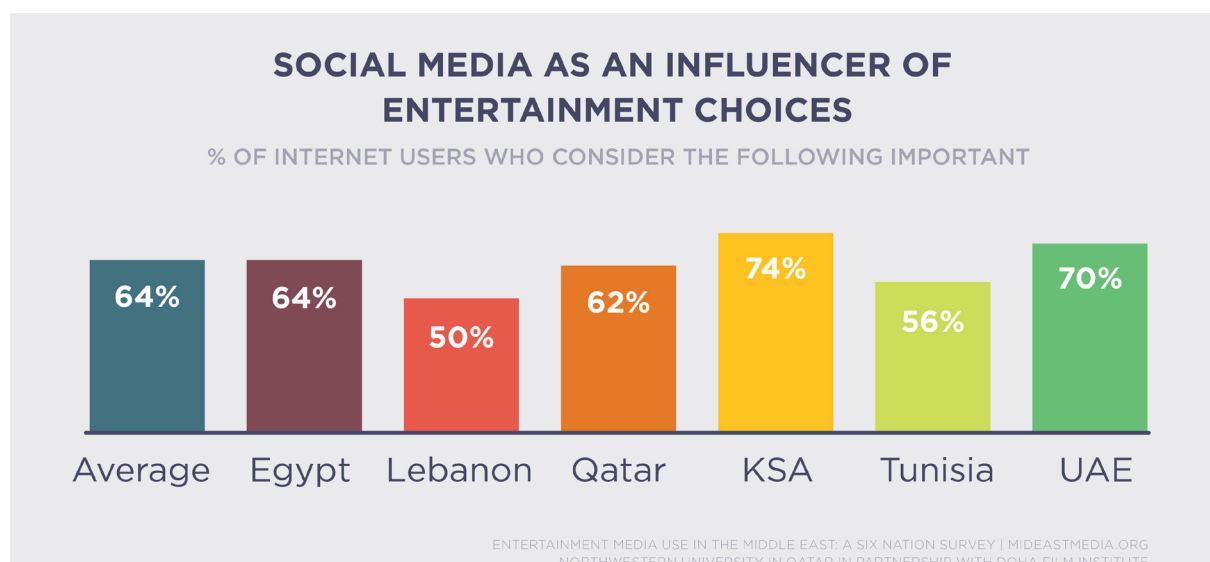
As a general trend, residents of Saudi Arabia and the UAE are more likely to find all sources of information important when making choices about entertainment, while Tunisians and Egyptians believe they are less influenced by these sources. Western expatriates and those who have achieved higher levels of education are more likely to say multiple sources of information are important when forming opinions about entertainment.

In addition to listening to the opinions of others, Internet users also like to share their own opinions about entertainment online. The majority chooses to post their opinions for others to see (55% do so), commenting on a wide variety of entertainment topics including online videos, user-generated content, sports, television, films and news. Internet users in Tunisia are mostly like to share their opinions online (81% do so), while fewer in Lebanon do so (39%).

## SOCIAL MEDIA

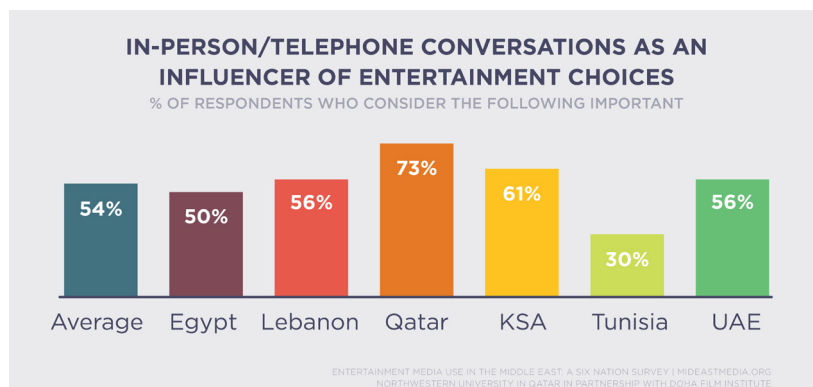
As noted above, social media are seen as the most important influence in choosing entertainment among Internet users (64% say so); only in Qatar and Lebanon are personal and telephone conversations listed as comparable influences. Qatari Internet users—who generally have less of a presence on social media overall—are much less likely to cite social networks as important influences (48%). Comparatively,

most Internet users in Saudi Arabia and the UAE list social media as entertainment influencers (74% and 70%, respectively). Social media are the most important influencers for those younger than 45; those 45 and older rely more on professional reviews and word-of-mouth.” But even among this oldest group, more than half are influenced by social media (54%).



## IN-PERSON AND TELEPHONE CONVERSATIONS

Taking into account all adults – those who use the Internet as well as those who don’t – we find that personal conversations are reported to be the important influence on entertainment choice; more than half of respondents (54%) say they are influential. Even Internet users find personal conversations important, behind only social media. Personal conversations

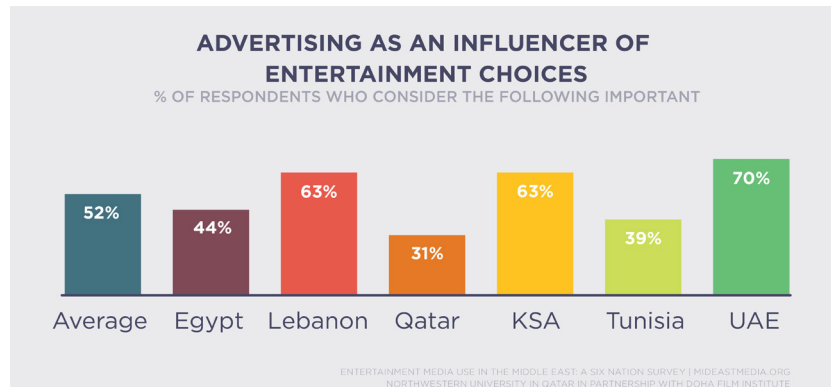


are, by far, the greatest influencers in Qatar, where three-quarters of residents list this as important when choosing entertainment (73%). Comparatively, a minority (30%) in Tunisia feels personal social interactions are important for informing opinions about entertainment.

## ADVERTISING

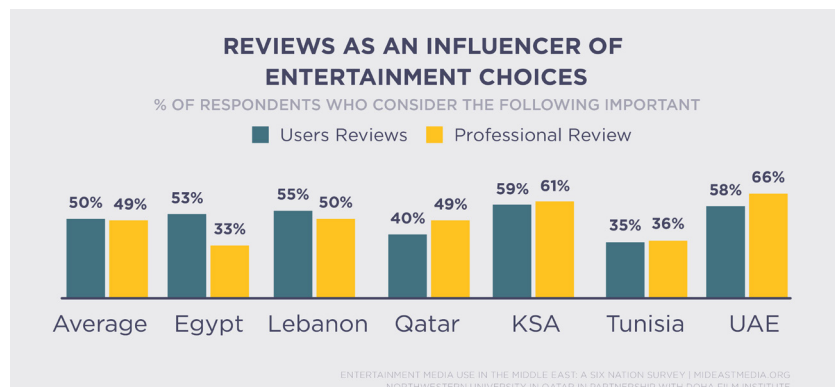
A slight majority – whether Internet users or not – believes advertising is an important influence on their choices of entertainment. Advertising is of great importance in the UAE (70%), but far less influential in Qatar, Tunisia, and Egypt (31%, 39%, and 44%, respectively). Advertising is of roughly similar appeal to those under 45, while those 45 or older claim to be less swayed. Advertising is of greater influence, reportedly, to European and U.S. expats than to national citizens.

These figures are noteworthy, given the well-documented Third Person Effect in attitudes toward advertising, whereby media users often, if not usually, disavow advertising influences on themselves.



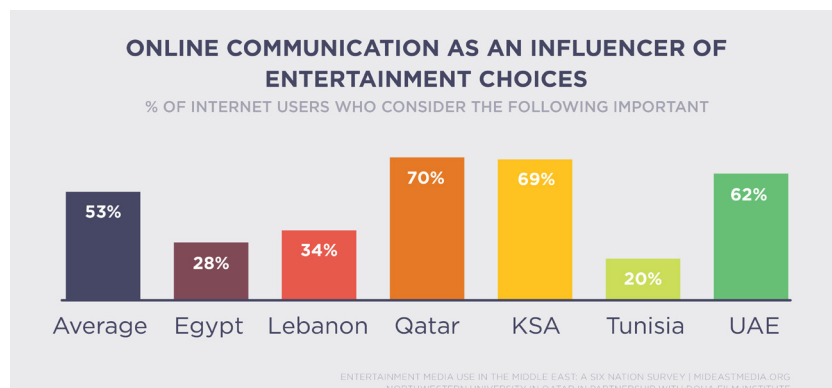
## REVIEWS

Critical reviews of all types—those from professional reviewers as well as user-generated—are evaluated as similarly important among all respondents. Half say each is important. There is some variation by country; residents of Qatar and the UAE find professional reviews more important than user reviews, while Egyptians place more confidence in user reviews. The remaining countries appraise both types of reviews more equally.



## TEXTING (SMS), INSTANT MESSAGING AND EMAIL

Texting, instant messaging and email are regarded as important influences on entertainment choice among Internet users (53% say so). These influences are, perhaps unexpectedly, somewhat more important to older age groups (48% under 25 vs. 56% 45 and older).

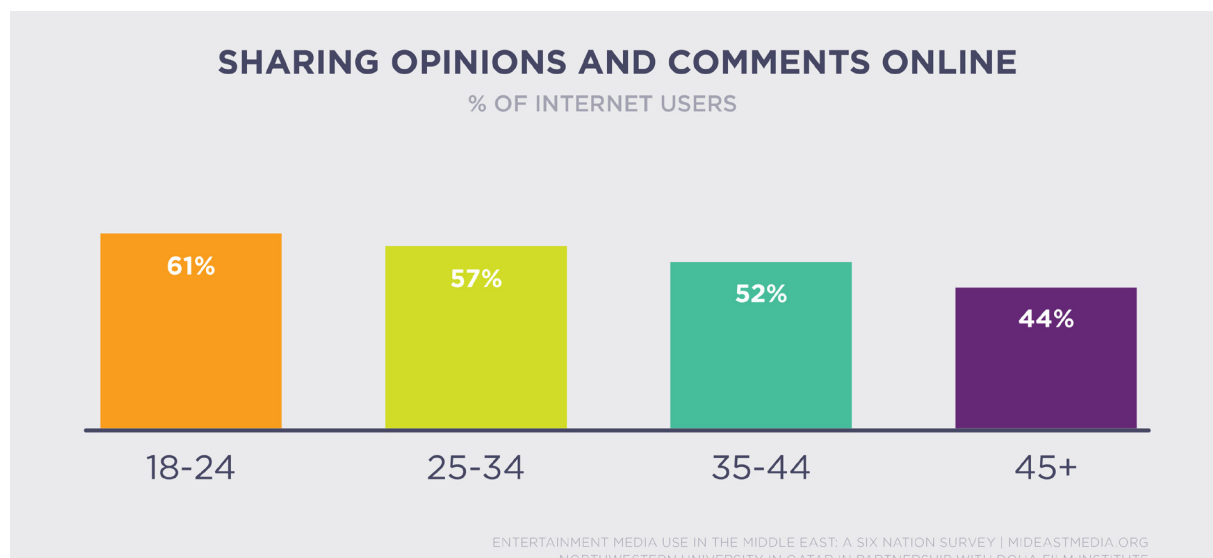


Texting/Instant Messaging/Email play a more significant role among Internet users in the Gulf states than in the other countries in the study. In fact, these means of communication surpass social media in importance among Internet users in Qatar (70% vs. 62%, respectively).

## SHARING OPINIONS AND COMMENTS ONLINE

More than half of Internet users in the study comment on or share their opinions of entertainment content with others online (55%); less than half choose not to share online (43%). Internet users in Lebanon are the least likely to post opinions online, as nearly two-thirds do not comment on entertainment on the Internet (61%). By contrast, Tunisians

seem much more likely to go online with opinions and commentary; only about one in six Tunisians do *not* share their opinions online (16%). Men are more likely to share their opinions online (57% vs. 51% of women). Younger Internet users are also more likely to comment online, but nearly half of those 45 and older do so (61% under 25 vs. 44% 45 and older).



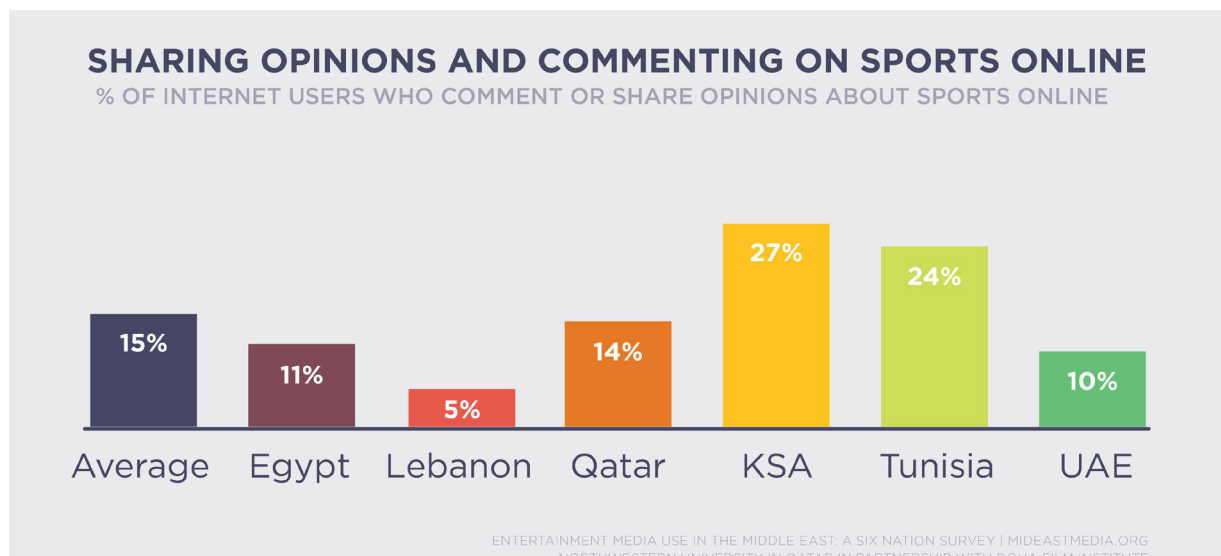
## WHICH KINDS OF CONTENT MOST ENCOURAGES ONLINE DIALOGUE

Those who share opinions and comments on entertainment online do so about a wide variety of topics, with no one type of content standing out. Discussing online video content appears to be slightly more popular; one in five Internet users discuss video content online (20%). After that, there is a similar amount of online discussion about user-generated content, sports, television series, news stories, films and reality shows, each generating commentary by about one in seven Internet users.

Sharing opinions and commentary about online video is especially common in Tunisia, where nearly half (44%) of online Tunisians offer perspectives. Sharing views about online videos is also popular in Saudi Arabia (27%) and Egypt (25%). Qatar's Internet users report less sharing of views about video content online; less than one in ten residents of Qatar (9%) do so.

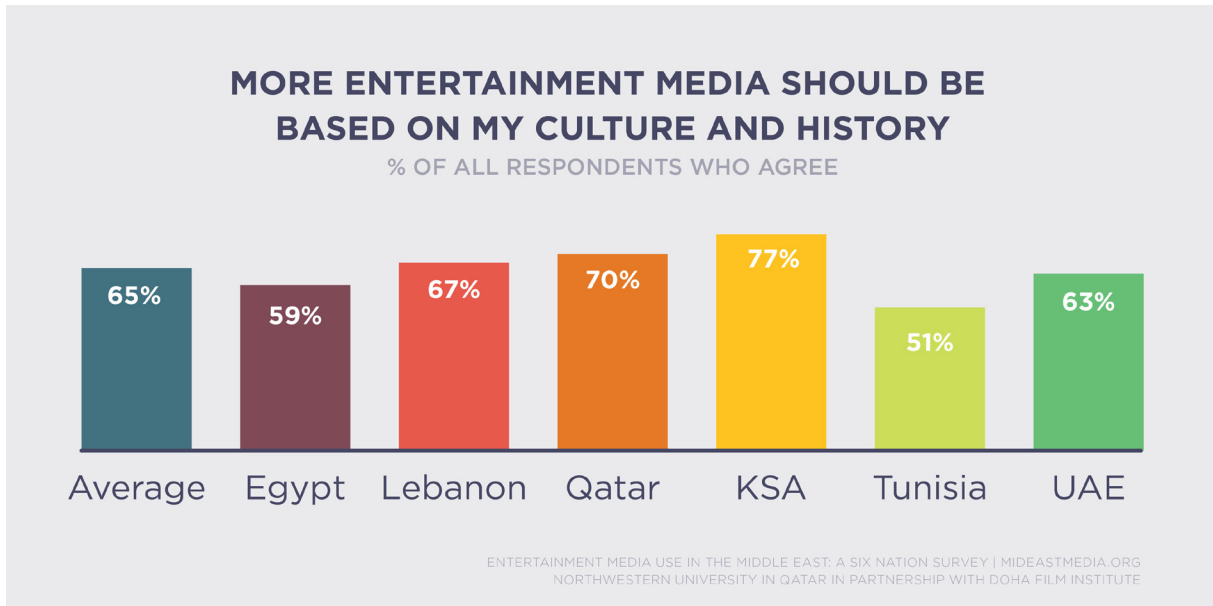
Other content attracts similar levels of sharing and commentary, although residents of some countries seem somewhat more partial to specific types of content. Residents of Saudi Arabia, for example, seem more likely than those elsewhere in the MENA region to comment online about sports (27% vs. 15% overall), TV series (35% vs. 15%) and films (28% vs. 14%). Egyptians are attracted more to discussing user-generated content online (24% vs. 17% overall).

In the overall sample, men are far more likely than women to share views on sports (23% vs. 5%), and women are a little more likely to post opinions about TV series (18% vs. 12%). European and U.S. expats are generally more likely to share comments online about sports, television and films, while country nationals share more online about videos and user-generated content. Younger Internet users are also more likely to post comments about videos and user-generated content online.





# Censorship and Cultural Attitudes



## SUMMARY

A strong sense of indigenous culture—and a desire to preserve it—is felt in all countries surveyed. Respondents express concerns about potentially negative influences from outside the region, and at the same time see benefits in watching content from different parts of the world. There is general approval of government regulation of sensitive content such as violent and romantic content, and many support blockage of content that might be considered offensive. This support for censorship and government monitoring of entertainment content is observed across all facets of the population, except, perhaps, among Western expatriates in Qatar. In fact, in no other area of this survey do we find such consistency of opinion across the surveyed population.

While adults in the six participating countries show a clear preference for content generated in the Arab world across all media (except, perhaps, video games), they also consume—and enjoy—content from all parts of the world, the United States in particular. And while most people surveyed prefer entertainment about their own culture, many acknowledge that it is important to be exposed to other cultures through entertainment media.

In general, people see government involvement in media as a positive influence on content quality. Those who support censorship are more likely to be older, have children in the household, and are less likely to use the Internet.

## PORTRAYING REALITY IN ENTERTAINMENT

The large majority of the people surveyed believe entertainment should be more tightly regulated when it comes to violent and romantic content, and that some scenes should be deleted or whole programs banned, if some people find them offensive (about seven in ten agree with each of these statements). Conversely, less than a third expresses the opposing opinion that films and television shows should be shown in their entirety even if some people find the content inappropriate (29%).

This support for censorship of entertainment material is expressed in all six countries,

in Egypt, Tunisia and Lebanon. In Saudi Arabia and the UAE, national and expat groups both show support for regulation and censorship of entertainment. In Qatar, nationals, Arab expats and Asian expats all support regulation and censorship, while Western expats are split on the matter. Residents from the US and Europe tend to support regulation of violent content more than romantic content, and they are more likely to support omitting some offensive scenes rather than an outright ban of certain films and television programs. On the whole, Arab nationals are slightly more likely to support regulation of violent content than



but most strongly in Saudi Arabia. Those in Tunisia appear to be more tolerant, but still more than half of Tunisians agree with tightening regulation and censorship of entertainment material. Those in the UAE are most likely to say films and television programs should be shown in their entirety even if some people find the content inappropriate (39%).

Residents of the Gulf states participating in this study are generally more supportive of regulation and censorship than are those

romantic content (75% violent content vs. 70% romantic content).

One's cultural viewpoints are strongly associated with attitudes toward regulation and censorship. Those who strongly agree that "more should be done to preserve cultural traditions" are much more stringent in advocating tighter regulation by government than those with less commitment to tradition. About eight in ten of those with strong feelings about cultural traditions support regulation of violent and



romantic content and also support banning or deleting offensive content, compared with two-thirds of those who are less concerned with preserving their cultural traditions.

Support for regulation and censorship of entertainment content is expressed among all age groups, but it is especially strong among those 45 and older. Education also has an association with opinions about regulation. While people of all education levels express support for regulation and censorship, those with only primary schooling appear to be somewhat more tolerant - they are slightly less supportive of regulation of violent and romantic content

and are less likely to support the deletion of content that may be considered offensive or inappropriate (about two-thirds agree with these statements).

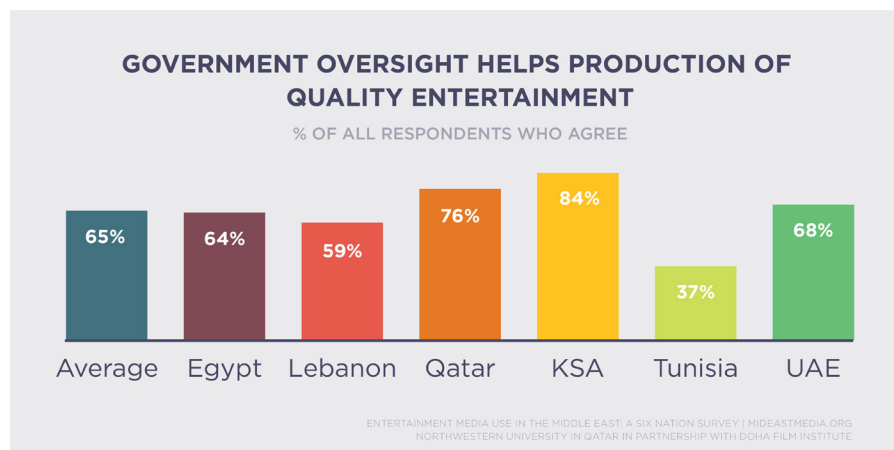
Those who have children in the household are more likely to support government regulation, both in general and specifically related to children's entertainment. Eight in ten of those with children in the home would like the government to do more to protect their children from certain content. Three-fourths of those with a child in the home agree with regulation and censorship of entertainment more generally, including violent and romantic content.

## GOVERNMENT INVOLVEMENT IN ENTERTAINMENT

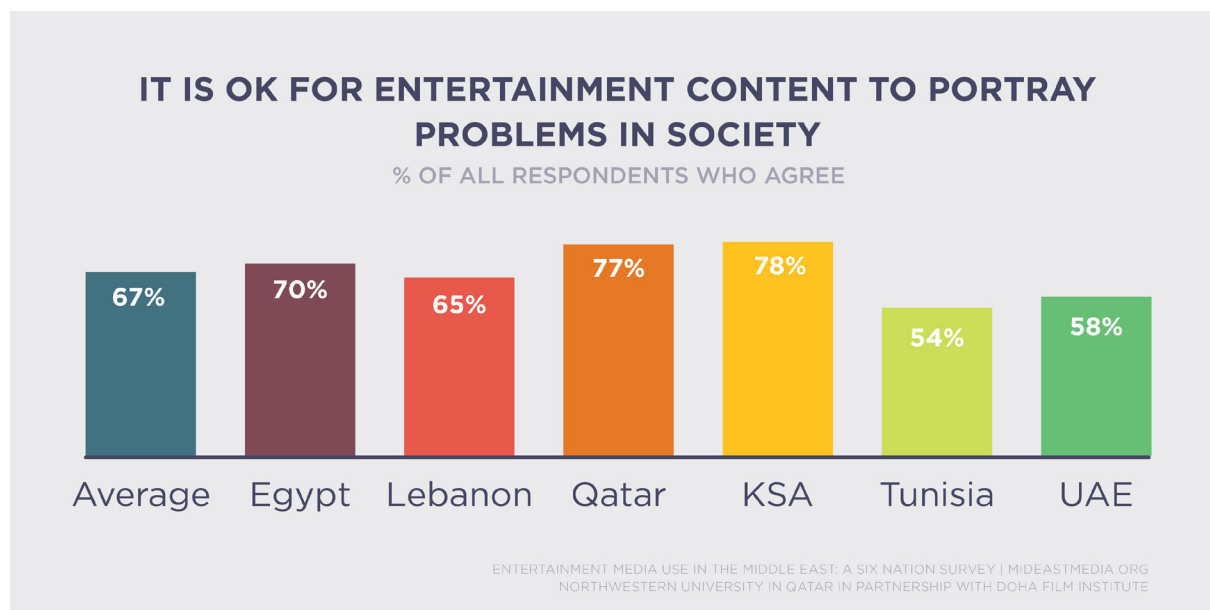
People in the countries included in this survey feel there is a positive role for government in entertainment. Two-thirds of participants watch some of their country's government-produced entertainment and an equal number believe government oversight strengthens the quality of entertainment (64% and 65%, respectively). This assessment of the government's impact on quality is felt most strongly in Saudi Arabia and Qatar (84% and 76% agree, respectively). Those in Tunisia hold a different view of government than respondents in other countries - less than half of Tunisians watch government-produced entertainment (46%) and only a

third believes the government enhances the quality of entertainment (37%).

People with strong ties to their cultural heritage are much more likely to support government involvement in entertainment. Nearly three-quarters of those who feel more should be done to preserve their cultural traditions watch their country's government entertainment programming, and a similar number believe government oversight helps the quality of entertainment (72% and 71%, respectively). In comparison, less than half of those who do not feel more should be done to preserve cultural traditions agree (47% and 46%, respectively). Those with the least amount of education (primary school or less) express the least support for government involvement in entertainment (57% watch government produced entertainment and 51% feel government oversight enhances entertainment quality).



## PORTRAYING REALITY IN ENTERTAINMENT



While the majority of people in these countries oppose the airing of “offensive” entertainment, they still want their entertainment to reflect “reality.” Many, though not majorities in all countries, believe entertainment offers an opportunity to learn about real life issues and events, and also feel entertainment should portray both good and bad aspects of society. Two-thirds of respondents say they learn about real life through entertainment media and that it is okay for entertainment to portray problems in society (63% and 67%, respectively). They are less convinced, though, that entertainment challenges rather than reinforces cultural stereotypes (49%).

Residents of Saudi Arabia, followed by those in the UAE, are the most likely to view entertainment as an opportunity to learn about real life issues (85% and 73%, respectively) and challenge stereotypes (77% and 53%, respectively). Tunisians and Egyptians do not agree, as less than half agree they learn about real life from entertainment (45% and 46%, respectively) and even fewer believe entertainment challenges cultural stereotypes (28% and 38%, respectively).

Two-thirds of all adults believe people benefit from watching content from different parts of the world (66% agree). While majorities in all countries of this study agree with this sentiment, the opinion is strongest in Qatar and Saudi Arabia (78% and 77%, respectively). Nationals of these countries are near as likely as expats living in the country to agree with this sentiment—78% of nationals in Qatar and Saudi Arabia (and 73% in the UAE) agree that people benefit from watching content from different parts of the world. Tunisia is the only country in which less than half agree that people benefit from viewing content from outside the Arab world (44%).

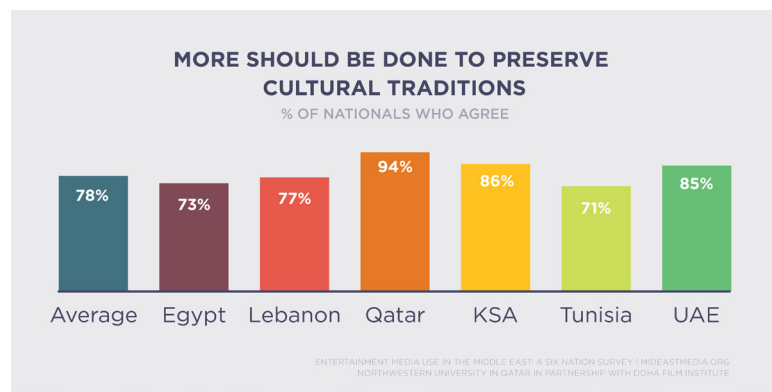
Views on these issues are largely consistent across demographic groups. Older respondents and those with lower levels of income and education are less likely to feel entertainment media challenge rather than reinforce cultural stereotypes (44%, 45% and 29%, respectively). Those with less schooling are also less likely to see benefits in watching extra-regional entertainment (47% agree).

## CULTURAL IDENTITY

Most respondents have a strong sense of culture and want to preserve their culture and heritage via entertainment. While some may also enjoy entertainment media from outside the region, there is a strong affinity and preference for entertainment from and about the Arab world.

Overall, the large majority believes more should be done to preserve cultural traditions (79%). An almost equal majority also believes it is possible for a culture to preserve their heritage in the 21<sup>st</sup> century and that more should be done to integrate the culture with modern society (70% each).

People in all six countries agree with the importance of upholding cultural traditions, but this sentiment is expressed most strongly in the three Gulf states: Qatar, Saudi Arabia, and the UAE, and particularly among citizens of these countries. A near universal nine in ten Qatari citizens believe more should be done to preserve cultural traditions. Those in Qatar and Saudi Arabia are also the most likely to believe this can and should be done in the context of the modern world (80% and 81%, respectively, agree that cultural heritage can be preserved in the 21<sup>st</sup> century; 76% and 79% agree their culture should integrate with modern society). Those in Lebanon also show strong agreement with the integration of culture and modern society (72%). Interestingly, those with less income and education express less interest in preserving their cultural traditions overall.



## ENTERTAINMENT AND CULTURAL IDENTITY

Cultural proximity matters in entertainment preference. Two-thirds of survey participants prefer to watch films that portray their own culture and would like more entertainment to be based on culture and history (65% each). The majority also believes film is an important source about one's culture (54%). Those from Saudi Arabia feel most strongly about the potential cultural benefits of entertainment and those from Tunisia much less so.

Those eager to preserve their cultural traditions are much more likely than those with less commitment to cultural traditions to watch films that portray their own

culture (74% vs. 48%) and to feel more entertainment media should be based on culture and heritage (75% vs. 41%).

Consistent with their lower level of support for preserving their cultural traditions, those with the lowest levels of income and education are also less likely to desire a closer connection of entertainment to their culture.

Across almost all media—film, television, music and online content—respondents are more likely to consume content from the MENA region, and their own country in particular, than content from any other

part of the world. Whether this is due to preference or the practical matter of availability is unknown, but Arab-produced content clearly dominates.

The gap between consumption of indigenous Arab content versus other content is most pronounced for television—more than eight in ten watch content from the MENA region, while one-third watch programming from outside the region. Comparatively, about three-fourths watch films from the Arab world with an almost equal number watching films from outside the region (71%), primarily from the United States (47%).

#### Consumption of Entertainment Content by Region: All Respondents

	Television	Music	Film	Online Content
MENA Region	83%	80%	78%	72%
One's country of residence	74%	70%	60%	59%
Outside of MENA Region	37%	45%	71%	50%
United States	17%	27%	47%	32%

Egyptians, Lebanese and Tunisians are far more likely to consume all kinds of media entertainment from the MENA region than those in Gulf states. However, this is likely due partly to the ethnic composition in Gulf countries. Among nationals in the Gulf states, nearly all (more than nine in ten) consume films, television, music and online content from the MENA region.

People in the six countries are most likely to watch and enjoy films and television from the MENA region, but many also report enjoying content from outside the region. Arabs – nationals and expats – also feel strongly that films and television produced in the region give a much more accurate portrayal of life and people in the Arab world and are better for morality than those from outside the region. In fact, they are more likely to say films and television from outside the region are *harmful* for morality than good for morality.

- Eight in ten Arabs enjoy Arab films and television, and 55% enjoy US (Hollywood) films and television; 82% feel Arab films and television accurately portray Arabs and 30% feel US (Hollywood) films and television do; 71% feel Arab films and television are good for morality and 19% feel US (Hollywood) films and television are good for morality, with 43% who feel US (Hollywood) films and television are harmful for morality. Half of Arabs believe European films and television are harmful to morality (51%).



Asian and Western expats are more likely to enjoy US (Hollywood) films and television than Arab material, and they are more likely to say US (Hollywood) films and television are more accurate and better for morality than Arab films and television.

- Among Western expats who watch Arab and US (Hollywood) films and television, 68% enjoy Arab films and television and 91% enjoy US (Hollywood) films and television; 59% feel Arab films and television accurately portray Arabs and 84% feel US (Hollywood) films and television do; and 60% feel Arab films and television are good for morality and 76% feel US (Hollywood) films and television are good for morality.
- Among Asian expats who watch Arab and US (Hollywood) films and television, 34% enjoy Arab films and television and 78% enjoy US (Hollywood) film and television; 33% feel Arab films and television accurately portray Arabs and 64% feel US (Hollywood) films and television do; and 36% feel Arab films and television are good for morality and 55% feel US (Hollywood) films and television are good for morality.

## ENTERTAINERS WHO EXEMPLIFY ARAB CULTURE

When people were asked which actor or performer they feel best represents their culture, the responses were almost as varied as the number of people surveyed. No one genre of entertainment stood out. People were equally likely to name a film actor, talk-show host or singer/musician as fulfilling this role (about 20% named someone from each of these genres), and television actors and comedians were also well represented on the list (15% each).

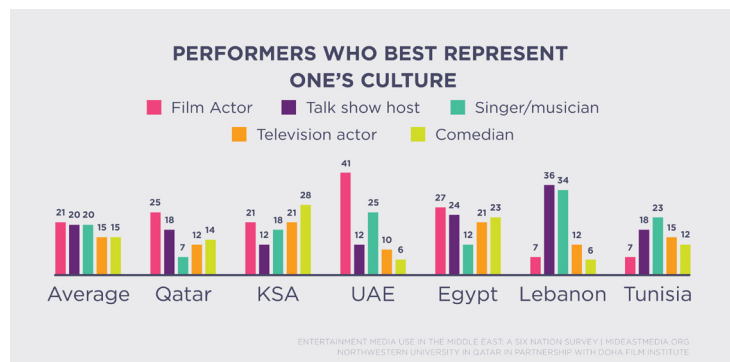
The selection of who best represents the culture varied by country, however. Residents of the UAE were much more likely to name a film actor than any other type of performer (41%), whereas Lebanese named talk show hosts and singers/musicians most often (36% and 34%, respectively). Comedians were named most often in Saudi Arabia (28%), and singers/musicians were named most often in Tunisia (32%). Lebanese and Tunisians rarely named film actors and those in Qatar were less likely to name a singer/musician.

Younger people were much more likely to mention singers/musicians as best representing their culture (28%), a finding consistent with their greater consumption of music overall. Asian and Western expats named film actors much more often than other entertainment figures as representative of their own cultures.

The specific individuals named were

numerous. There was almost no overlap across countries, and so here named are those figures cited most often as cultural representatives. Only those named by at least 4% in a given country are reported here:

- Lebanon: 10% named Tony Khalife (musician) and 8% Marcel Ghamen (talk show host). After that, Fairouz (musician) and George Khabbaz (actor) were each named by 4%
- Tunisia: 4% named Ala Chebbi (TV personality); no one else was named by more than 3%
- Egypt: 8% named Adel Imam (actor), and 4% each named Ahmed Elsakka (actor) and Ahmed Helmy (actor)
- Saudi Arabia: 7% named Nasser Al Qasabi (actor); no one else was named by more than 3%
- Qatar and UAE: no one was named by at least 4%



## A PROFILE OF THOSE WITH A STRONG SENSE OF CULTURE

We compared those who strongly agree that “more should be done to preserve cultural traditions” against those who disagree or take a neutral position. A strong profile of those who are “culturally oriented” emerged:

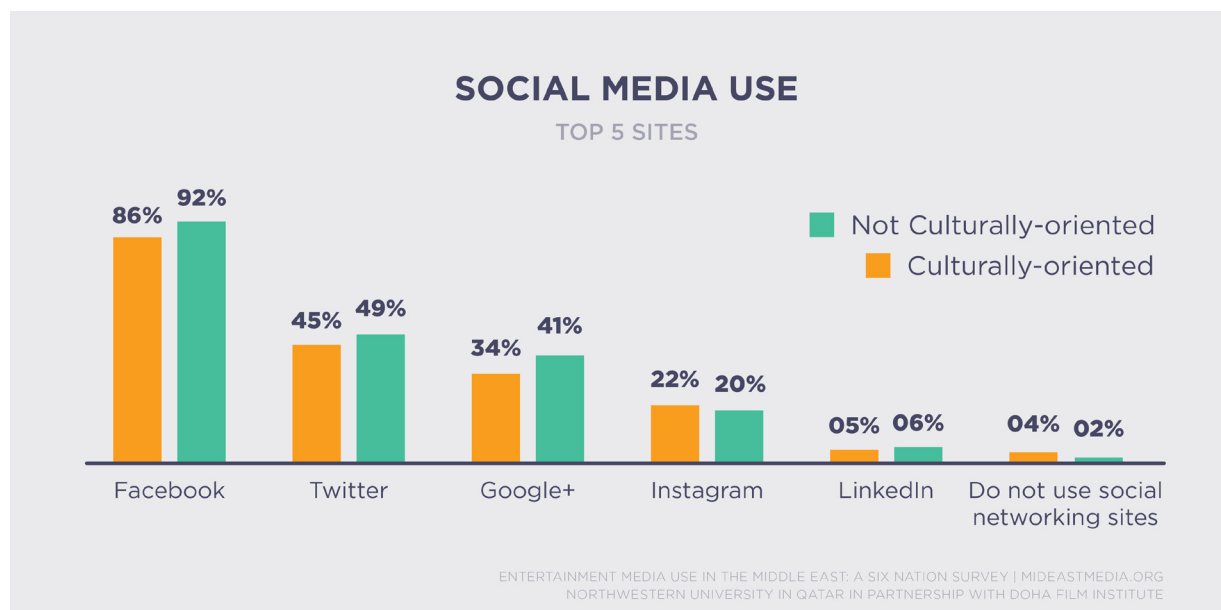
Demographically, those who are culturally oriented are older, more likely to be married and more likely to have a child in the household than those who are less culturally oriented.

Behaviorally, those who are culturally oriented attend religious services more often than those who are not culturally oriented (13% vs. 27% never attend) and spend more time with family (41 hours vs. 33 hours weekly with family). They are less likely to be on Facebook (86% vs. 92%) and Google+ (34% vs. 41%). They are less likely to share their opinions online (50% vs. 60% share online) or vote for a contestant on a television reality or talent show (13% vs. 17%).

Attitudinally, those who are culturally oriented are more likely than those who are not culturally oriented to support

government regulation and censorship of entertainment (on average, more than seven in ten of the culturally oriented agree versus less than half of those who are not as culturally focused). They are more likely to enjoy films about their culture (74% vs. 48%) and to feel there should be more entertainment media about culture and history (75% vs. 41%).

From an entertainment perspective, those who are more culturally oriented are more likely than those who are less culturally oriented to consume and enjoy films, television, and online content in Arabic and content from the MENA region, but are no less likely than this group to consume and enjoy media in English and from outside the region. They are slightly less likely to prefer comedy (46% vs. 53%) and more likely to prefer religious material (19% vs. 9%) and documentaries (18% vs. 14%). They are more likely to listen to Arabic music (80% vs. 74%) and less likely to listen to Western music (38% vs. 42%). Those who play video games are less likely to play games related to sports (28% vs. 36%) and war (20% vs. 32%).





## PROFILING THOSE WHO VALUE CULTURE AND CENSORSHIP

We compared those who strongly agree that entertainment content should be more tightly regulated for violent and romantic content and that entertainment content should be banned if some people find it offensive against those who disagree or take a neutral position on these issues.

When profiling those who “strongly support censorship”, a similar but not identical profile emerges compare to those with a strong sense of culture:

Demographically, those who strongly support censorship are older more likely to have a child in the household are less educated and are more likely to be of Arab descent than those who are not supportive of censorship.

Behaviorally, those who strongly support censorship attend religious services more often than those who don’t support censorship (14% vs. 22% never go) and spend more time with family (43 hours vs. 33 hours weekly) and less time with friends (10 hours vs. 15 hours weekly). They are less likely to use the Internet (65% vs. 80%), and those who are online are less likely to be on Facebook (80% vs. 91%) and Google+ (27% vs. 43%). They are less likely to share their opinions about entertainment online (50% vs. 39% do not share).

Attitudinally, those who strongly support censorship are more likely than those who don’t support it to want to preserve their culture (91% vs. 55%). They are more likely to enjoy films about their own culture (74% vs. 37%) and to feel there should be more about culture in entertainment (78% vs. 39%).

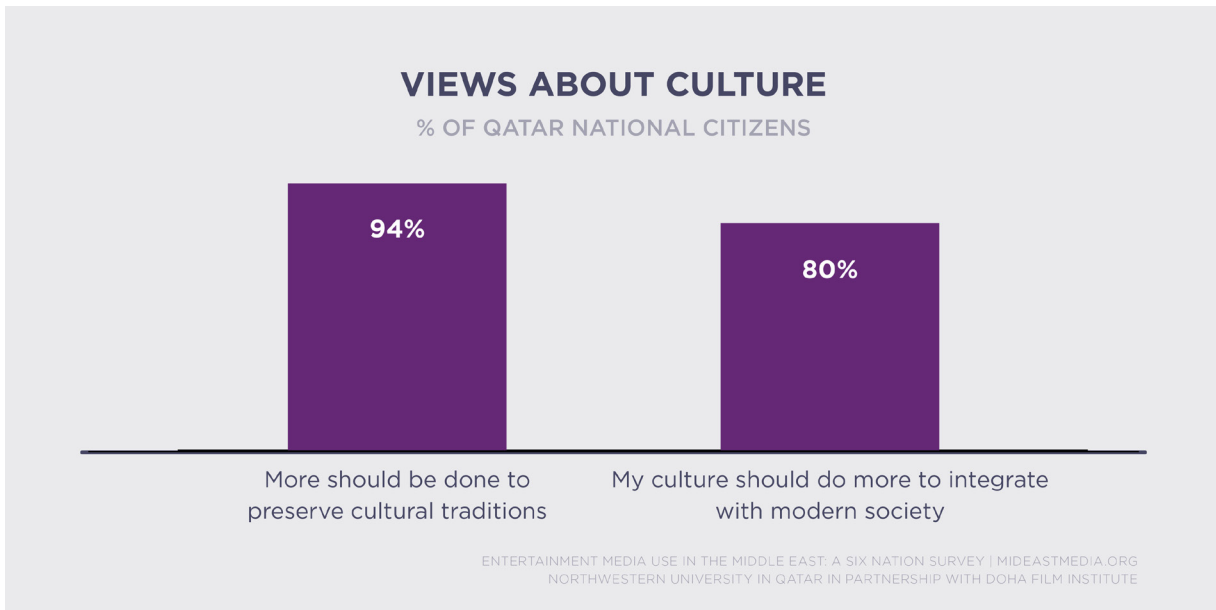
From an entertainment perspective, censorship supporters are more likely than those who do not support censorship or are neutral about it to consume and enjoy films, television and online content in Arabic and content from the MENA region, but are no less likely than others to consume and enjoy media in English and from outside the region. They are less likely to prefer action/adventure films (43% vs. 61%) and horror/thriller films (18% vs. 25%), and more likely to prefer dramas (48% vs. 33%), religious (18% vs. 8%) and historical films (12% vs. 8%). They are more likely to listen to Arabic music (89% vs. 60%) and less likely to listen to Western music (29% vs. 62%). Those who play video games are less likely to play games related to sports (28% vs. 40%) and war (22% vs. 30%) and more likely to play games in Arabic (31% vs. 19%) and those related to education (17% vs. 11%). They are more likely to prefer to watch news on television (43% vs. 37%) and they spend more time with news content online (48% vs. 41% of time spent accessing news videos).



# Focus on Qatar







## SUMMARY

This chapter provides insights with regard to attitudes toward, and behavior pertaining to, entertainment among residents in Qatar. The main body of the report includes participants from Qatar, and points out areas where Qatar (and other countries) stands out. This chapter takes a more focused look at some of the key topics covered in the study, more specifically by nationality in Qatar. The sub-groups considered include Qatari nationals, Arab expatriates, Asian expatriates and Westerners.

Among the six Arab countries covered in this survey, Qatar is unique in the makeup of its population—along with the UAE—in that its number of expatriate residents far outnumbers national citizens in the country.

These results suggest notable differences among the nationalities living in Qatar with regard to their attitudes, preferences and behaviors related to entertainment media. In many respects, the opinions and habits of Qatari nationals and Arab expatriates mirror those of their Arab neighbors. For example, they show a strong respect for Arab culture that they wish to see reflected in their entertainment choices, and they support government regulation and censorship of entertainment media. In other respects, nationals in Qatar report different behaviors and interests than others in the region. More Qataris, for example, use Instagram than Facebook, whereas other nationals in the study prefer Facebook. Qataris enjoy religious content and are less interested than other nationals in locally-produced entertainment (perhaps reflecting relatively little material produced in Qatar rather than disdain for material produced there).

Non-Arabs living in Qatar seem rooted in their own heritage with regard to entertainment preferences. Rather than embrace the entertainment alternatives from the Arab culture in which they are living, they tend to seek out entertainment from their own parts of the world.

Qatari nationals are a small minority in their own country. This may help explain why nationals are strongly committed to preserving cultural traditions (94% agree), and do not see those traditions at odds with a modern, global society. While Qataris confidently agree that it is possible to preserve one's culture and heritage in the 21<sup>st</sup> century, they also feel one's culture should be more integrated into the modern world (85% and 80%, respectively). Nationals in Saudi Arabia and the UAE—which also have high expatriate populations—agree that one's culture and heritage can be preserved in the 21<sup>st</sup> Century and integrated into the modern world (84% and 81% in Saudi Arabia, 84% and 68% in the UAE).

## MEDIA AND LEISURE IN QATAR

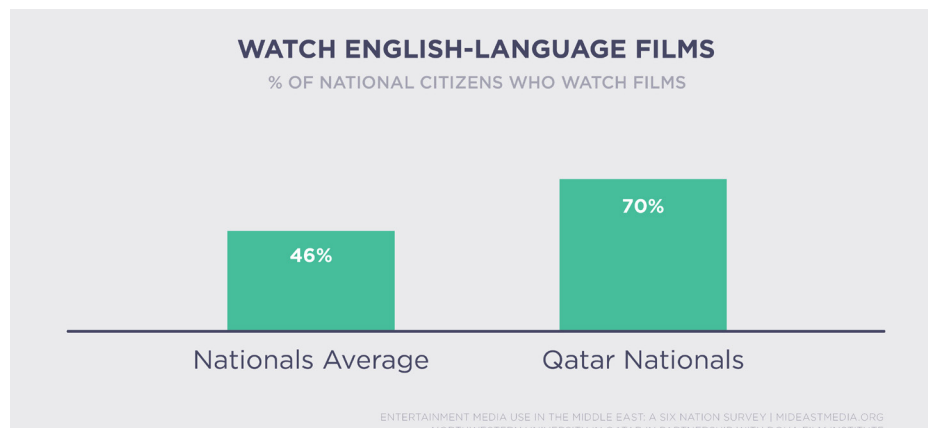
Most people living in Qatar enjoy television, films, passing time online and going shopping for fun and leisure, much like others throughout the MENA region. However, those in Qatar have some unique entertainment media habits. Qatar residents are much more voracious readers of print media for entertainment purposes, including newspapers, books and magazines, than all others from the region. Eight in 10 Qatar residents read newspapers, and half do so daily (81% and 53%). Comparatively, two-thirds in the region read newspapers, and only a quarter do so daily (65% and 26%). Qatar residents are also more likely than others to participate in sports and exercise

vs. 75%) or on disc (43% vs. 53%).

Expatriates in Qatar exercise and play sports more than nationals—nearly nine in 10 expats of all nationalities say they play sports and exercise, compared with three-fourths of Qataris (73% Qatari nationals, 87% Arab expats, 85% Asian expats, 89% Westerners). Expatriates are also more likely than nationals to report reading books and magazines for entertainment; newspaper readership is more consistent across nationalities, but highest among Asian expats (88%).

Arabs in Qatar are different from many other Arabs in the region with regard to

the languages in which they consume media. While almost all Arabs in Qatar consume media in Arabic—films, television, music, video games, videos and print—many also do so in English. Of note, seven in 10 Qataris watch English language films, four in 10



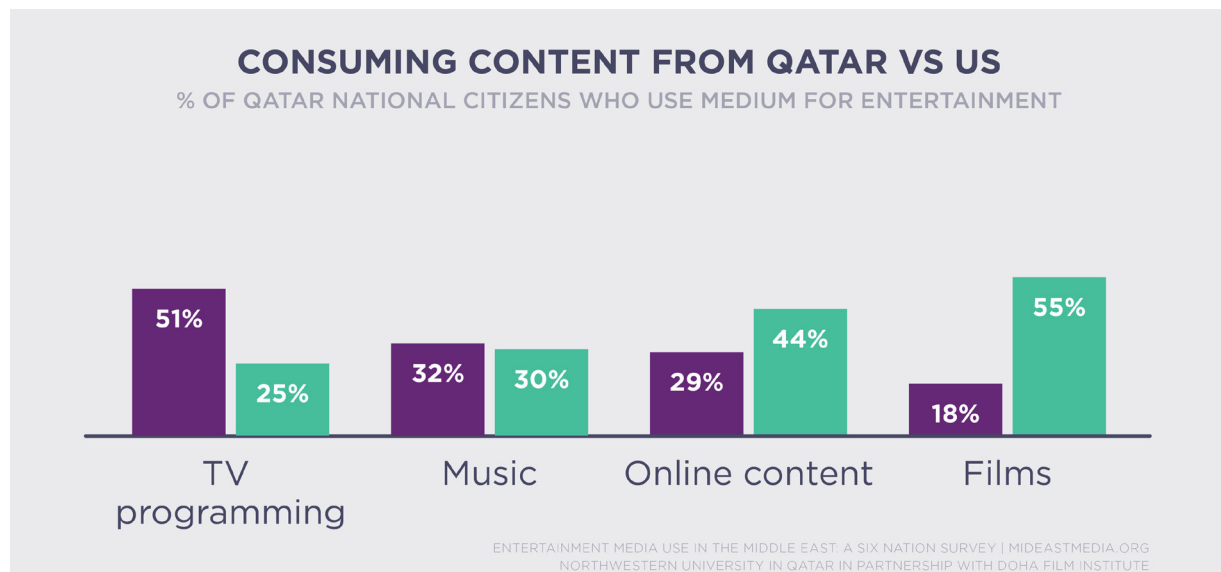
(83% vs. 65%), and three in 10 claim to exercise every day (31%). Overall, those in Qatar are less likely to listen to music (71% vs. 84% total sample) or to play video games (33% vs. 43%) than others in the MENA region. Qatar residents enjoy films as much as those in the other MENA countries, but prefer different formats for watching them. Most people across the region watch films on television, but Qatar residents are more likely than residents from the other countries (except UAE) to go to the cinema (52% Qatar vs. 45% total sample; 82% UAE), while Qataris are less likely to watch films on the Internet (66%

watch TV or listen to music in English, and one-quarter read printed materials in English. Notably, Qatari gamers (and other Arabs in the country) are more likely to play video games in English than Arabic (84% English, 34% Arabic); nationals in other countries are more likely to play in Arabic. Asian and Western expats in Qatar consume entertainment content almost exclusively in English. Asian expats also commonly consume entertainment content in Hindi.

While most people in this survey watch entertainment produced in their own country

Qatar is an outlier in this respect. Only three in 10 Qatar residents watch Qatar-produced television, and even fewer watch online content or listen to music from Qatar (18% and 14%, respectively). A meager 9% watch Qatar-produced films. Even Qatari nationals do not frequently consume Qatar entertainment—51% watch television, 32% listen to music, 29% watch online content and 18% watch films produced in Qatar. Whether this low consumption of Qatar content is due to a lack of material or a lack of preference was a question not asked in this study.

Qataris are more likely to consume content from the United States than from Qatar. Qataris do enjoy content from the MENA region, if not from Qatar in general. A large majority of Qataris watch films, television and online content, and listen to music from the MENA region, primarily from Mashreq-Levant countries (Egypt, Lebanon, Jordan, Syria, Iraq, etc.) and Arab Peninsula/Al Khaleej countries (Saudi Arabia, Kuwait, UAE, Qatar, Bahrain, Oman and Yemen).

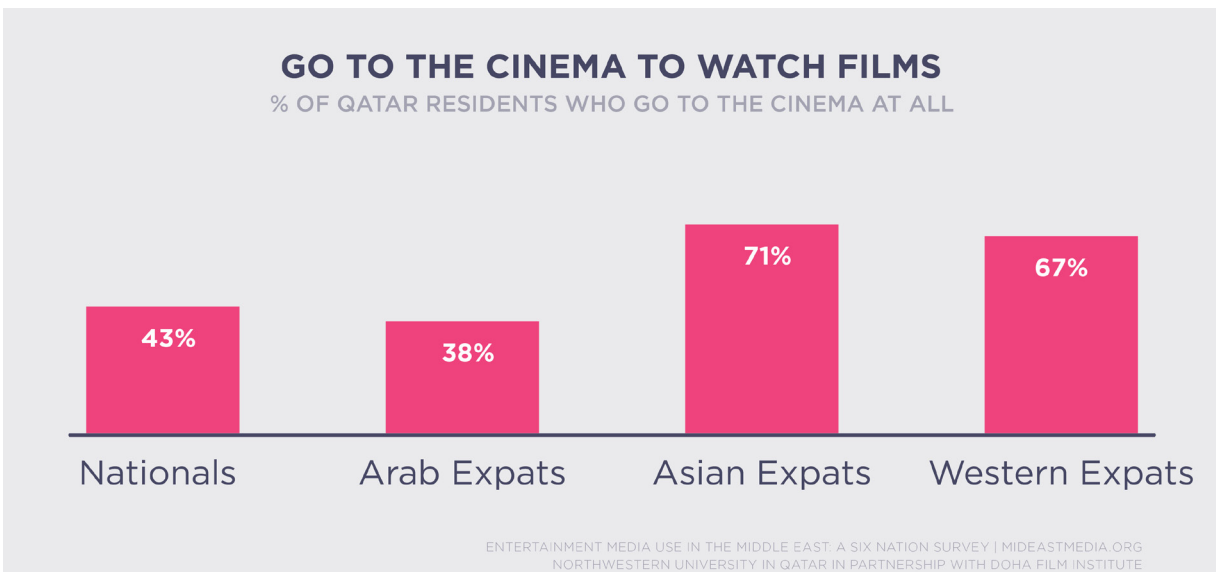


## FILM

Films—in a variety of formats—are important for entertainment in Qatar, as they are throughout the region. A large majority of Qatari residents watch films on television (85%) and this behavior is consistently high among all nationalities. Additionally, the majority of Internet users—regardless of nationality—watch films on the Internet (66%). There are differences among residents, though, in cinema attendance and use of discs such as DVDs and BluRay to watch films. Going to the cinema to watch films is a popular pastime among non-Arab expats, but not as much among Arabs in Qatar. Two-thirds of non-Arabs go to the cinema (71% Asian expats, 67% Western expats), compared to fewer than half of Arabs who ever go to the cinema (43% Qatari nationals, 38% Arab expats). Similarly, non-Arabs are more likely to watch films on disc, possibly because this is one of the few means of watching films from outside the region that they enjoy. More than half of non-Arabs in Qatar view films on disc (53% Asian expats, 60% Western expats), compared with one-third of Arabs who do so (34% Qatari nationals, 36% Arab expats).

While a large number of both Asian and Western expats watch films in the cinema and on disc, Westerners are more likely to find these to be “important” sources for their entertainment. Asian expats assign more importance to the Internet than to cinema or discs for viewing films. Men in Qatar are more likely than women to watch films via all channels, with the exception of films on TV. Younger individuals (under 35) also tend to prefer films more than those who are older, regardless of format.

Film-watchers among all nationalities in Qatar list comedy and action/adventure among their favorite genres to watch, and many enjoy dramas as well (57%, 53% and 30%, respectively). One in five Qataris put horror/thriller, documentary and religious genres in their “top 3 favorites”; they are more likely than other groups to prefer religious-themed films. A third of Asian expats put children’s/family films and Bollywood among their favorites, while a third of Western expats enjoy documentaries.



## TELEVISION

Almost everyone in Qatar watches television. The large majority—three-quarters—say this is an important part of their entertainment, and seven in 10 watch TV daily. The large majority of all nationalities in Qatar watch TV daily, although Qataris are slightly less likely to view TV this often (62%).

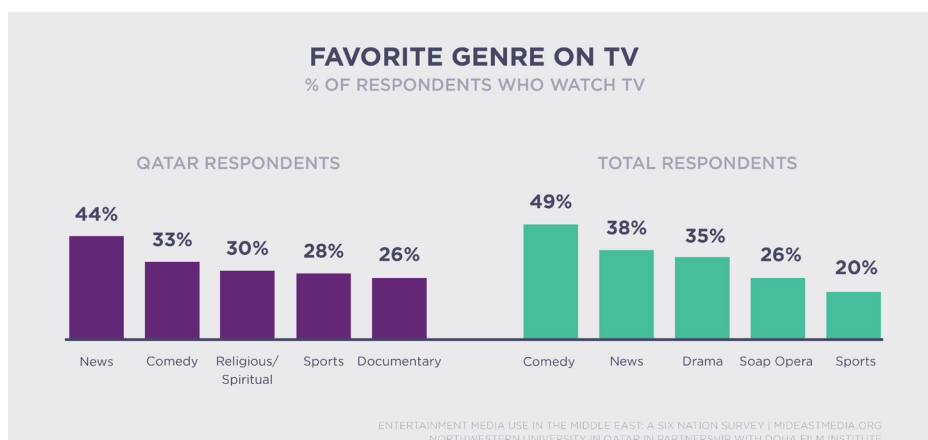
Free-to-air and subscription television are the primary formats for watching TV, but there are stark differences by nationality. Most Qatari nationals and Arab expats watch television programming on free TV (72% and 64%, respectively), while Asian and Western expats are more likely than Qataris to watch subscription TV (44% and 57%). There is likely a connection with the type of programming available on free vs. subscription TV, with the latter likely to air more shows preferred by non-Arabs.

A third of Internet users in Qatar watch TV online, either streaming or downloaded. This practice is more common in Qatar than other countries participating in the study (33% Qatar vs. 26% total sample). In Qatar, Arab expats are the most likely to watch television shows online (41%).

Residents of Qatar prefer news over other genres of television, followed by comedy and religious content (44%, 33% and 30%, respectively, cite these among their top three favorite genres). Sports and documentaries round out the top five (28%, 26%). All expatriate groups in Qatar express a greater preference for news as entertainment than nationals, perhaps as a way to stay current with what is happening in their own country and other parts of the world (37% Qatari nationals, 50% Arab expats, 43% Asian expats, 58% Western expats). Qatari nationals and Arab expats are unique in their preference

for religious programming (39% and 44%), which is much higher than others living in the country or around the MENA region (14% overall put religious/spiritual programming in their top three favorite genres of television).

“Binge watching” television shows—consuming two or more episodes of the same program in one sitting—is common in Qatar. Nearly half of adults report watching two or more episodes of a series at a time (45%). Western expats are the most likely to binge watch their favorite shows, with seven in ten reporting having done so (71%); more than four in ten among each of the other nationalities binge watch as well.



People in Qatar prefer to have some control over when they watch television, watching their shows when they choose to do so. Nearly half say they do this all or most of the time (45%); this is consistent across all nationalities. However, an equal number of Qataris watch most television shows at their scheduled time (47%) compared with only a quarter of Asian and Western expats who do so.

A sizeable minority of Internet users in Qatar likes to research and discuss television shows online—one-third does so. Arab expats—who also watch the most television online—are the most likely to discuss television their favorite shows online (40%). People in Qatar are as likely as others in the region to vote for contestants on reality or talent shows (13% Qatar, 14% total sample).

## VIDEO GAMES

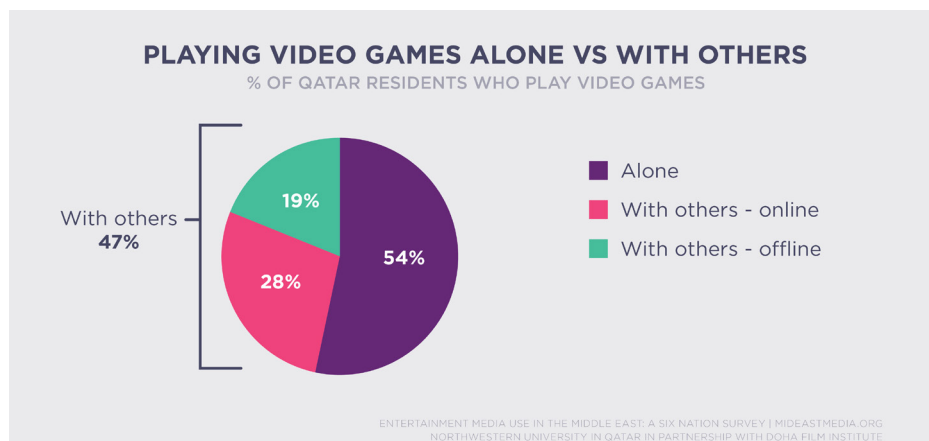
A third of adults in Qatar play video games, compared with 40% across the region. Those who do play video games spend four hours per week at it (median). Fewer than one in five feel video games are an important part of their entertainment (19%).

Younger adults in Qatar are the most likely to play video games, and interest declines significantly with age; those under 25 are more than twice as likely to play as those 45 and older (53% vs. 21%). One in three under 25 says gaming is important for their entertainment. Men are more likely than women to play video games (39% vs. 26%), but are no more likely to rate them important

for their entertainment.

Video game players in Qatar are only slightly more likely to play alone than with others (53.5% vs. 46.5%, mean percentages). Those who play are more likely to play with others *online* than offline (28% vs. 19%). Asian expats are the most likely to play with others online (36%).

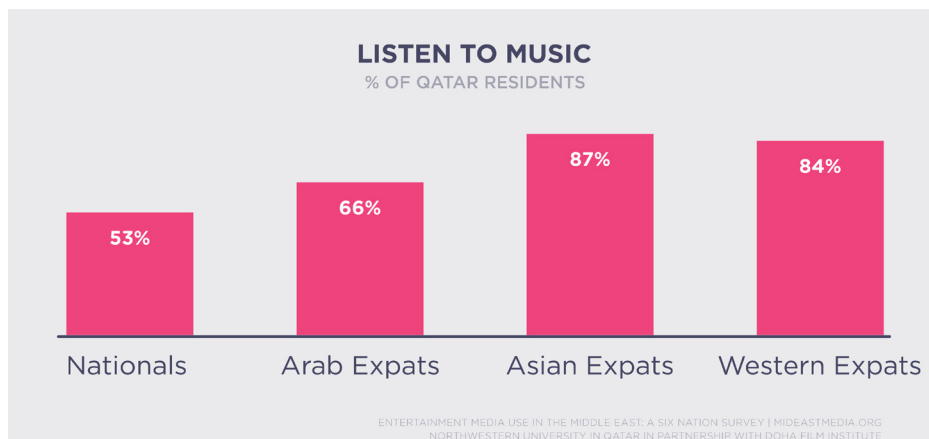
Driving/racing contests and sports games are the most popular (39% and 32%). No other genres come close in popularity.



## MUSIC

While the large majority of people in Qatar listen to music, music is not as popular as in other part of the MENA region (71% vs. 84% total sample). A similar number in Qatar and elsewhere listen to music daily (44% vs. 48%). Non-Arabs in Qatar are more likely to listen to music for entertainment than Arabs; in fact, only half of Qataris report listening to music (87% Asian, 84% Western,

**LISTEN TO MUSIC**  
% OF QATAR RESIDENTS



66% Arab expatriates vs. 53% Qatari nationals). Nationals in other countries are much more likely to listen to music.



Not only do non-Arabs listen more to music, they find music to be a much more important aspect of their entertainment. Two-thirds of non-Arabs in the country consider music to be important compared with only a quarter of Qataris (66% Asian, 68% Western, 37% Arab expiates, 27% Qatari nationals). Nationals in other countries are much more likely to consider music important for entertainment.

As in other areas of the region, younger people in Qatar are more likely to listen to music and consider it an important part of their entertainment. A strong 85% of those under 25 in Qatar listen to music—63% daily—compared with 60% of those over 45 who listen at all; additionally 58% under 25 find music important compared with 43% who are 45 and older.

Nationality seems to affect music preferences. Nearly all Qataris who listen to music listen to Khaleeji songs (87%); Egyptian and Iraqi music is also enjoyed by some Qataris (31% and 21%). About one in five Qataris listens to Western music. Arab expats listen to a variety of Arabic music styles, with most preferring Egyptian music (52%) and about one in three listens to Western music. Western expatriates listen to Western music almost exclusively (88%). Asian expats prefer Indian music, followed by Western music (66% and 46%). Fewer than one in five Western or Asian expats listen to any Arabic music. Overall, about one in 10 non-Arab expatriates listens to religious music; Asian expats are the most likely to do so, while very few Qatari nationals listen to religious music (19% vs. 3%).

## ONLINE AND SOCIAL MEDIA

Internet penetration is high in Qatar; 85% are online. All Westerners living in Qatar are online, compared with 78% of nationals. Arab and Asian nationals fall between the two (84% and 91%, respectively). More men are online than women (90% vs. 80%). Nine in 10 of those under 45 are online, but Internet use is still high among the oldest age group (75%).

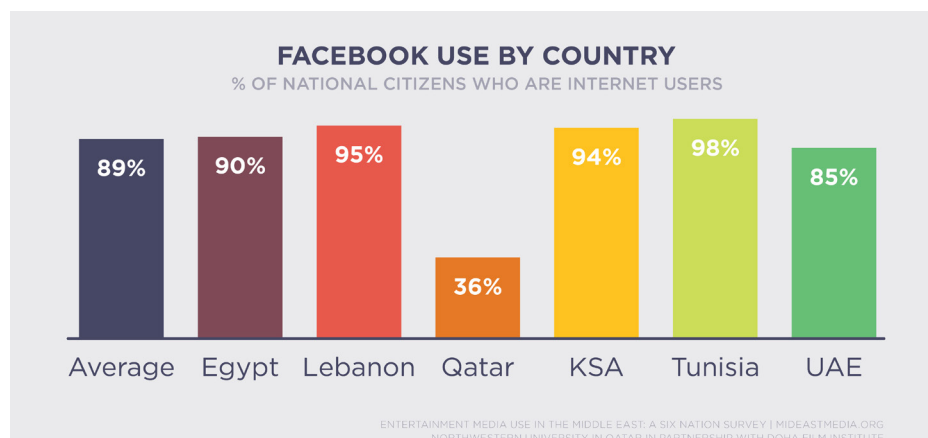
For all nationalities in Qatar who are online, the Internet plays a large role in their entertainment. Almost all Internet users pass time online for leisure (94%)—

three-fourths daily—and passing time online is important for entertainment (71%). A similarly high 83% watch online videos, but fewer do so every day (38%). Watching online videos is also important for entertainment (59%).

In Qatar, “news” is the most popular form of online entertainment, followed by comedy (42% and 39% put them in their “top 3” favorite genres). In fact, only in Qatar are news videos accessed more often than entertainment videos (news 50%, entertainment 36% of the time).

Comparatively, across all Internet users in the region, 43% of the videos they access are related to news and 49% to entertainment.

Expatriates in Qatar are more interested in online news than Qataris, similar to



their greater interest in news on TV, again, possibly as a means to stay current with what is happening in their own countries and/or regions. Notably, this strong interest in news as entertainment is unique to Qatar.

After news and comedy, one-quarter of Qatar residents put online sports, documentaries and religious content among their favorite genres of online entertainment. Interest in religious content is strongest among Qataris and Arab expats (28% and 34%). One-quarter of non-Arabs in Qatar like to watch online music videos, a preference seen across the MENA region. One in four Qataris name soap operas as a favorite genre, and one in four Asian expats favor food/cooking videos.

While the majority of Internet users enjoy watching videos and other content online, they are not likely to pay for them. Roughly 80 percent say they are not likely to pay to stream or download films, music or video games (though a third of Qataris would pay for video games); and only one in 10 would pay for television series. One in three Qataris, Arab expats and Westerners say they would pay to watch sports events. This is similar to residents of the UAE (27%), but much lower than in Saudi Arabia (64%). Residents of Saudi Arabia are much more likely than all other countries to say they would pay for all types of Internet content.

In the context of robust worldwide adoption of social media, it is noteworthy that adults in Qatar, while clearly attracted to social media, are not as overwhelmingly committed to it as residents of the other five countries in this study. Social media is one area Qataris—and to some extent expatriates in the country—behave differently from others in the region.

As in other countries, the top social networking sites used in Qatar are Facebook, Google+, Twitter and Instagram. However, use of these sites varies considerably by subsets of the population. Usage of Facebook is nearly universal across the MENA region, as well as among all expat groups in Qatar. Qataris, however, have not embraced Facebook for social networking to the same degree; only one in three Qatari nationals say they are on Facebook. In fact, Qataris are more likely to use Instagram (46%) and as likely to use Twitter as Facebook (37% and 36%). This variable differs for Qataris by age. Fifty-three percent of Qatari nationals under 35 say they use Instagram, 47% Twitter and 41% Facebook.

Overall, Twitter use is far lower in Qatar than in the region overall. A third of nationals use Twitter, and just a quarter of expats in the country use Twitter. This compares with half of Internet users overall in the region. Non-Arabs living in Qatar are more likely to use Google+ than Twitter—four in 10 use Google+—which is similar to use by others in the region. Comparatively, only one in five Qataris and Arab expats use Google+. Instagram is highly popular among Qatari nationals (46%) but not as much among others living in the country. After the “top 4” social networking sites, a third of Westerners connect with other professionals on LinkedIn (35%), but this site is not as popular with other groups in the country.

Of note, while there is not much variation in social media use in Qatar by age, younger people in Qatar (under 25) are more likely to be on Twitter and Instagram (43% and 45%, respectively). Those 25-34 are the most likely to be on Facebook (77%).



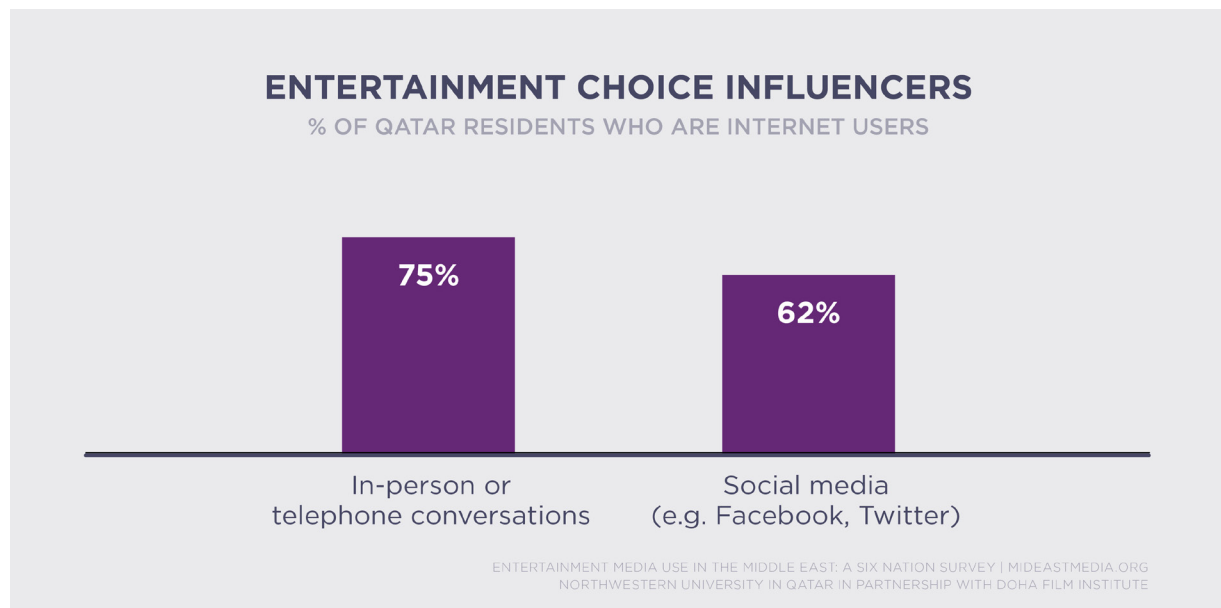
## CONTENT CHOICE

Adults in Qatar tend to rely on different sources of information more than others in the region when making choices about entertainment. Personal communications with others, in-person or via the Internet, may influence entertainment choices more among those in Qatar than for others throughout the MENA region. Three-fourths say in-person and telephone conversations with others are important, compared with half of adults across the region (73% vs. 54%). Similarly, seven in ten Internet users in Qatar say texts/instant message/email are important for entertainment, compared with half of all other Internet users across the region (70% vs. 53%). Personal communications are even more important in Qatar among Internet users than social media in perceived influence on entertainment choices (62%).

After that, those in Qatar rely more on “objective” sources of information about entertainment options, such as news stories and professional reviews, than on promotional material such as advertising

and user opinions. Six in 10 in Qatar say news stories and articles are important for entertainment choices, compared with fewer than half across the region (59% vs. 43%); half rely on professional reviews (49%). Those in Qatar are much less likely than others around the MENA region to list advertising as important in their entertainment choices (31% vs. 52%) or user reviews (40% vs. 50%). There are not many differences across nationalities in the country, but non-Arabs in Qatar rely a little more than Qataris on reviews, both professional and user-generated.

Half of Internet users in Qatar share their opinions about entertainment content with others online (49%). Qatari nationals and Westerners are generally less likely to share with others online (38% and 34%, respectively), while more than half of Arab and Asian expats do so (53% each). People are most likely to comment on news stories (18% do), especially Arab and Asian expats (22% each). About one in seven share opinions about sports (14%), a similar figure across nationalities.



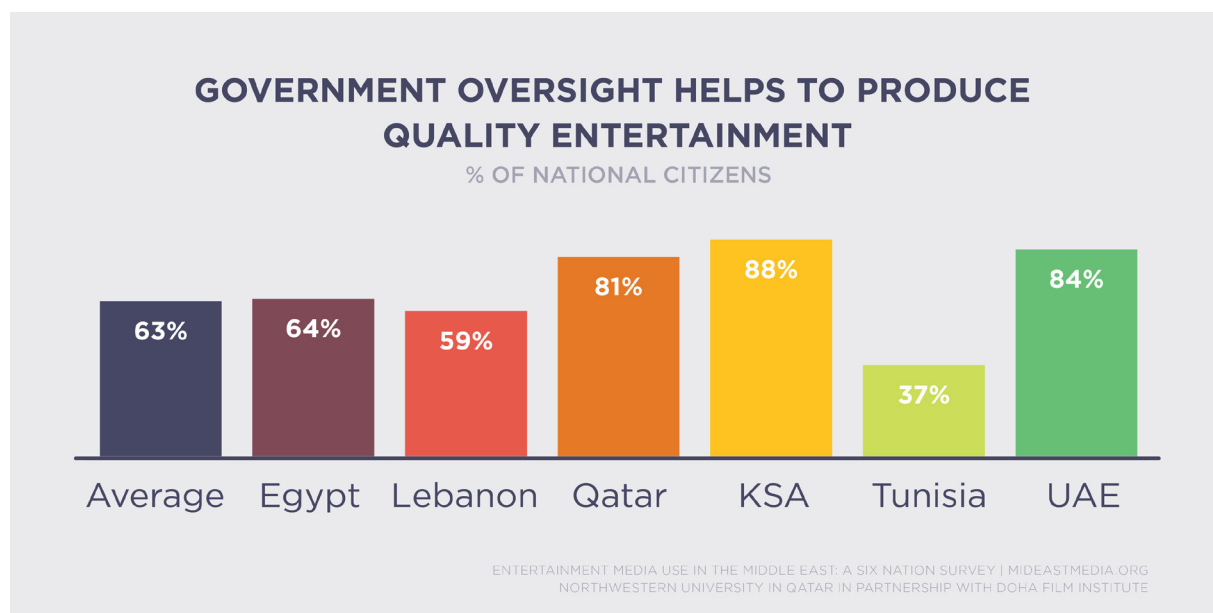
## CENSORSHIP AND REGULATION OF ENTERTAINMENT

Residents in Qatar generally support censorship and regulation of certain entertainment content. However, there is a sharp divide in perceptions about regulation and censorship of entertainment among nationalities in Qatar. Qatari nationals and Arab expats are most supportive of regulation and censorship. Nearly all Qatari nationals feel content should be deleted, or whole programs banned, if some people find them offensive (91% and 89%). Over eight in 10 Qatari nationals agree that violent and romantic content should be more tightly regulated (85% and 84%) and that government oversight helps to produce quality entertainment (81%). Arab expats in Qatar express similar opinions to Qatari nationals. Asian expats also express strong agreement with regulation and censorship, but not to the same degree as Qatari nationals.

Westerners living in Qatar do not agree. While about half support regulation of violent content and the deletion of some

sensitive scenes in entertainment (51% and 48%, respectively), they do not feel romantic content should be more tightly regulated or that material some people find offensive should be banned (59% and 55% disagree). Additionally, a minority of Westerners agree that government involvement helps the quality of entertainment media (43% agree). Residents in Qatar with children in the household are more likely than those without children to feel entertainment programs should be banned if some people find them offensive (76% vs. 61%) and violent content should be more tightly regulated (82% vs. 73%).

Despite their support for some entertainment content, residents in Qatar agree more than others in the region, that it is OK for entertainment to portray problems in society. They also agree that people benefit from watching entertainment from other parts of the world—three-fourths agree, which is consistent across nationalities in the country.

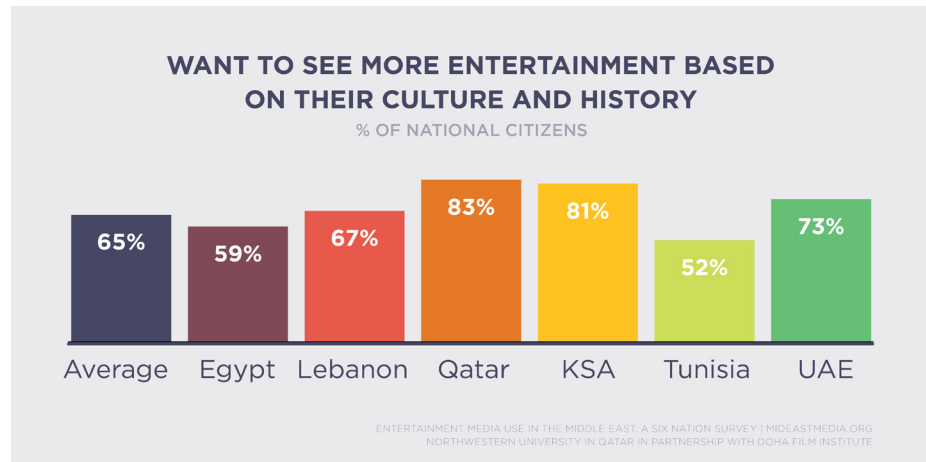


## CULTURAL ATTITUDES

The desire to preserve cultural traditions is strong in Qatar, as it is throughout the MENA region. The large majority of *all* nationalities in Qatar agree more should be done to preserve cultural traditions (94% Qatari nationals, 93% Arab expats, 86% Asian expats, 73% Westerners); the large majority of all groups also agree this is possible to do in the 21<sup>st</sup> Century. It's Arabs and Asian expatriates in Qatar, though, who feel their culture needs to integrate more with modern society; half of Western expatriates agree (80% Qatari nationals, 84% Arab expats, 68% Asian expats, 48% Westerners).

Looking at culture in the context of entertainment, Arabs in Qatar are more

likely to want to see more entertainment based on their culture and history. They are nearly twice as likely as non-Arabs in the country to desire more entertainment covering their culture and history (83%



Qatari nationals, 82% Arab expats vs. 52% Asian expats, 42% Westerners) or to prefer to watch films that portray their own culture (78% Qatari nationals, 76% Arab expats vs. 50% Asian expats, 32% Westerners).

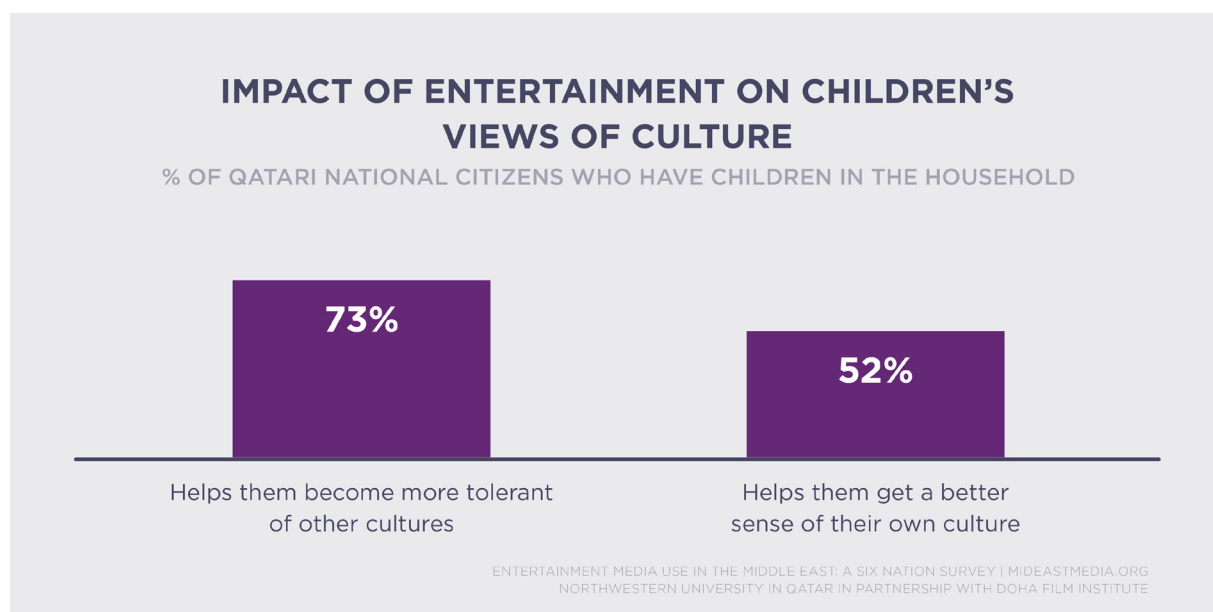
## CHILDREN'S MEDIA

Among those with children in the home, people in Qatar hold similar (positive) views as others in the region about the benefits of entertainment media for children. However, they are more likely than others to also express concern about perceived negative effects. Perceptions about children's entertainment—both positive and negative—are fairly consistent across nationalities in Qatar.

A strong three-fourths of people in Qatar with children in the household agree that entertainment media help people

become more creative and imaginative, develop greater coordination and fine motor skills, socialization, and learning skills needed for school.

On the other hand, people in Qatar with children in the household express more concern than others in the MENA region about the negative physical and mental effects of entertainment on children. Two-thirds of those in Qatar are concerned that entertainment media leads to poor health and obesity and contributes to poor concentration and



become more tolerant of other cultures; a positive perception, indeed, in a country with such a varied and young population. Qatar residents with children in the home, however, are much less convinced entertainment media help children get a better sense of their *own* culture (74% other cultures vs. 54% own culture).

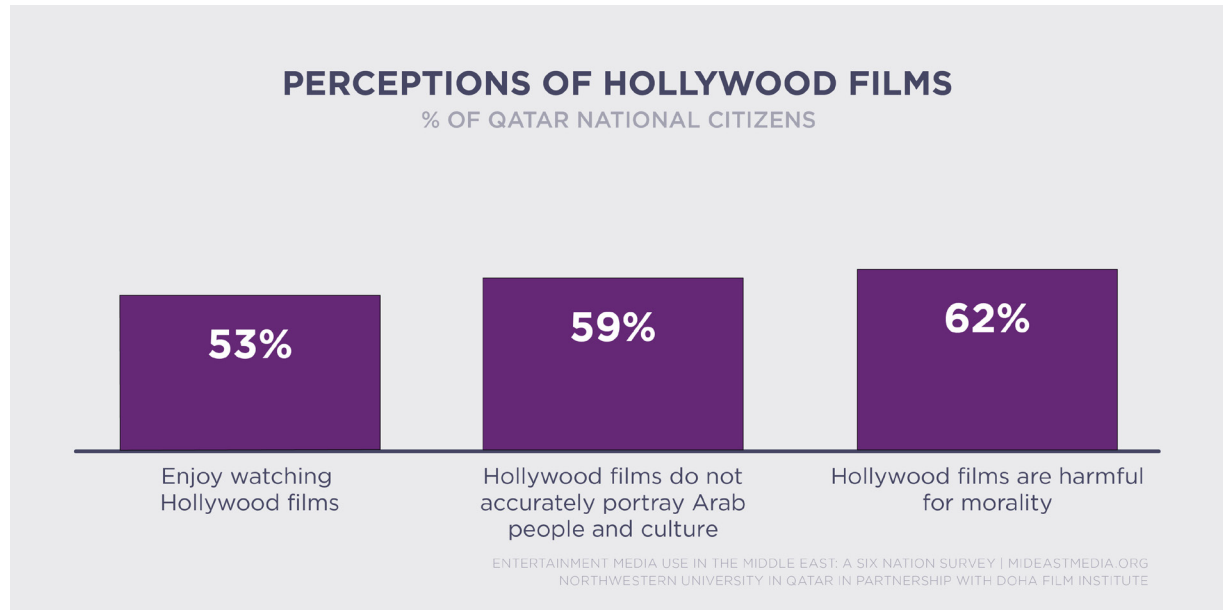
Two-thirds in Qatar also believe entertainment media help children

attention deficit, compared with four in 10 across the region. Roughly half of people in Qatar also express concern about entertainment media leading children to accept negative stereotypes, desensitizing them to violence and contributing a loss of morality/learning wrong values—all perceived to be of greater concerns among those Qataris than others in the region.

## ENJOYMENT AND MORALITY OF FILMS AND TELEVISION

When looking at the media habits of Qatari nationals, we see an interesting juxtaposition between enjoyment of films and television from outside the MENA region and their perceived impact on morality; a similar contradiction is observed among all Arabs in the region.

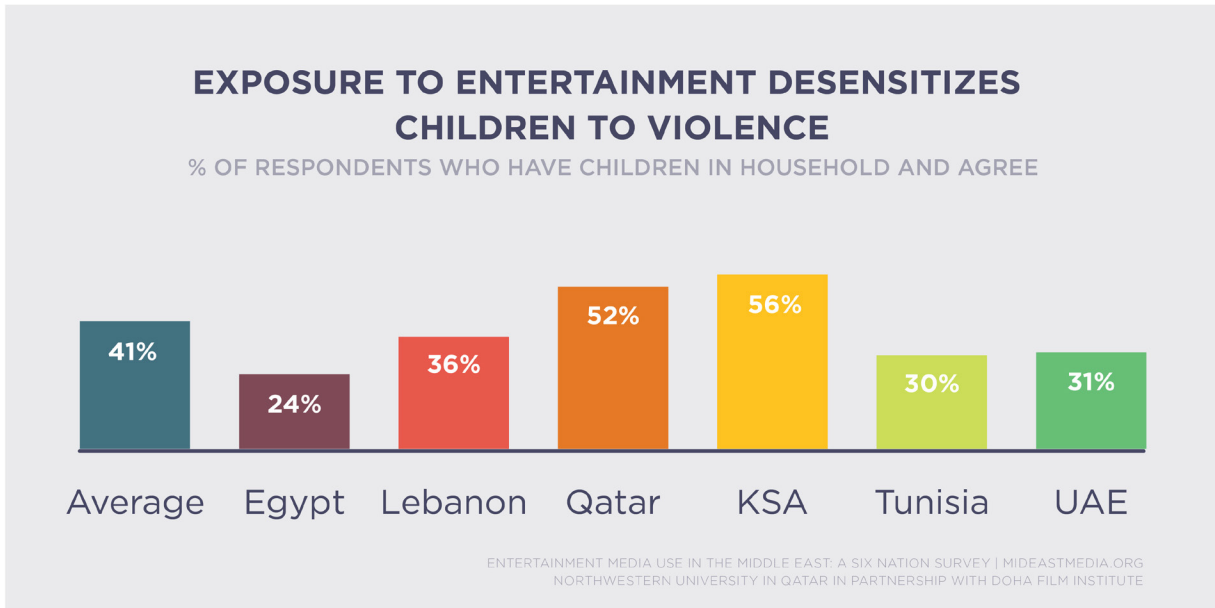
Qataris—and other Arabs—watch more films and television produced in the MENA region than films from elsewhere, and they generally feel this material accurately portrays Arabs and is good for morality.





# Children's Media





## SUMMARY

Entertainment media are generally seen as beneficial to children in the MENA countries surveyed. Still, there are some underlying concerns about perceived effects of overexposure to some entertainment. These findings are based on the opinions of MENA residents with children under 18 in their household, concerning the perceived impact of entertainment media to which these children are exposed. Many people with children in the household in the Gulf states are more likely to see both benefits and drawbacks of children's entertainment media, especially in Qatar and Saudi Arabia. Those with higher education levels express higher concern about the negative impacts of entertainment on their children. Expatriates tend to see media as a window for their children to learn about other cultures, but also about their own. This chapter assesses the perceived impact of children's entertainment media on all aspects of a child's development, including physical, psychological and social considerations.

## HEALTH AND WELL-BEING

In the six countries covered in this study, entertainment media are felt to help more than hinder health and wellness, although some people expressed concern about the potential negative effects of entertainment media on their child's physical well-being. A majority of people in households with children feel entertainment media help with development of hand-eye coordination and fine motor skills (57%). However, a substantial minority also believes exposure to entertainment media can lead to poor health and obesity (45%) and contribute to poor concentration among children (42%).

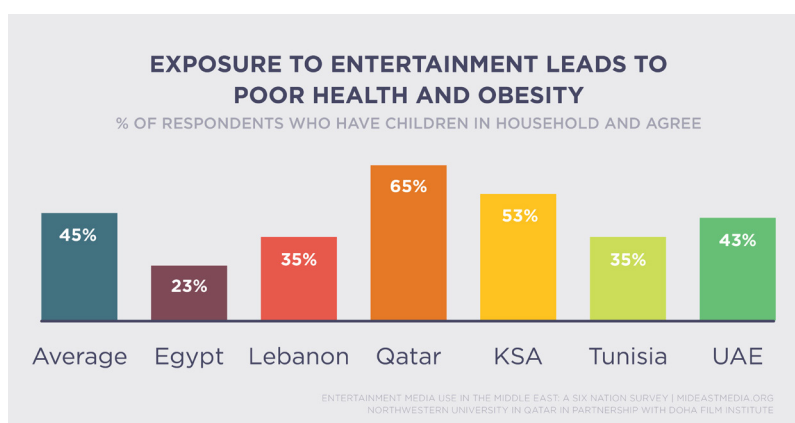
The position that entertainment media help with hand-eye coordination and development of fine motor skills among children is stronger in Gulf states (64%), where the use of mobile tablets is more common than in the other countries in the study. This view is felt most strongly in Saudi Arabia and Qatar (70% and 65%, respectively).

Western expats are much more likely than are Arab nationals to believe entertainment media can have a beneficial effect on children's hand-eye coordination and fine motor skills (75% vs. 54%, respectively). In Qatar, though, both nationals and expats share a similarly positive view of the matter.

The perceived link between entertainment media and poor health causes concern. Nearly half of respondents with children in the household feel exposure to entertainment media can contribute to poor health and obesity (45%), while a third disagree (31%). The concern that entertainment media contribute to poor health and obesity among children is particularly acute in Qatar, where two-thirds of respondents with children in the household see a connection (65%). Qatar also has one of the highest diabetes rates per capita. A majority also expresses concern in Saudi Arabia (53%). Concern about the impact

on health is consistent across nationalities in these countries. Egyptians are much less likely to perceive a link between media and poor health among children (23%).

The belief in a connection between children's entertainment media and poor health and obesity increases with age. Four in ten of those under 25 who live in a household with a child feel children's entertainment leads to poor health and obesity; this is compared with half of those 45 or older (40% vs. 52%). A belief in this link also differs according to education; those who have attended university, for instance, are much more likely than those with only primary education to accept a linkage (51% vs. 32%).



Four in ten people in the MENA region in a household with children agree that exposure to entertainment media creates a lack of focus or attention deficit in children (42%), whereas only 28% disagree. As with other health-related factors explored in the study, there are considerable differences of opinion between countries, with Egyptians being the most skeptical by far about a link between entertainment media and attention erosion (just 15% agree). Only in Qatar does a solid majority express concern about a connection between entertainment media and children's lack of focus and attention (63%). Qataris and other Arabs in the country tend to be more concerned about the impact of entertainment media on attention than non-Arab expats living in Qatar, although the majority of all groups assumes a linkage.

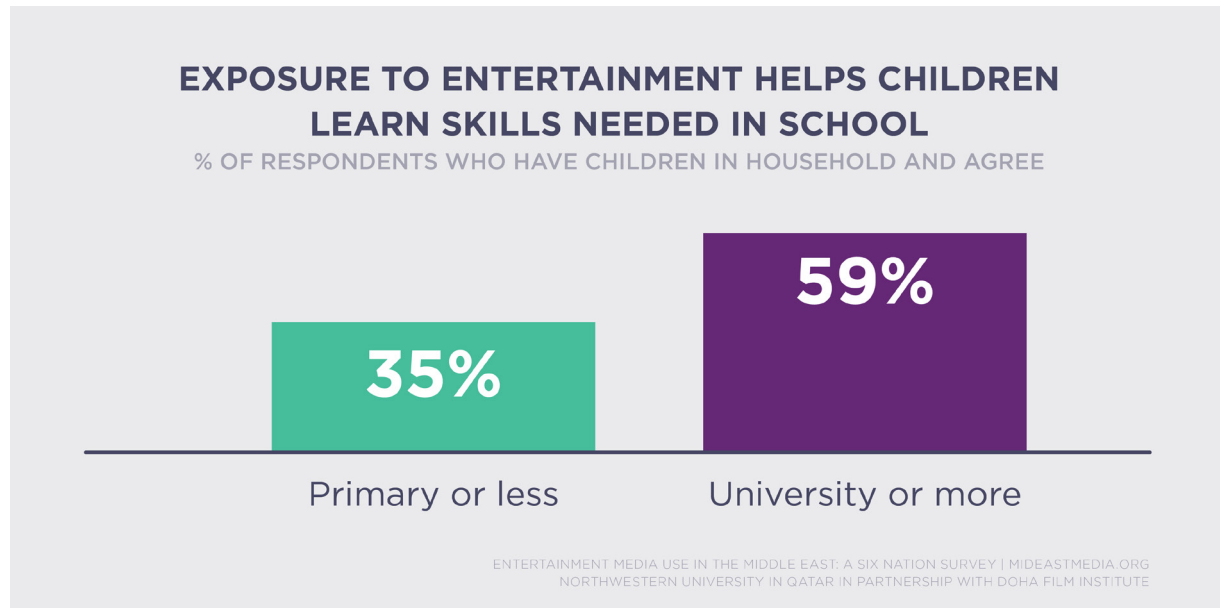


## SCHOOLING AND EDUCATION

Among all the plausible media effects people were asked to consider in this study, there was the highest agreement that entertainment media sparks creativity; two-thirds agree that exposure to entertainment media helps children become more creative and imaginative (66%).

much more so among Western expats than among Arab expats and nationals (79%, 61% and 59%, respectively).

Also positive, a majority of those in households with children in the MENA region agrees that exposure to entertainment



A belief in the ability of entertainment media to spark creativity in children was highest in the three Gulf states, but about half in Egypt, Tunisia and Lebanon also believe in such a benefit.

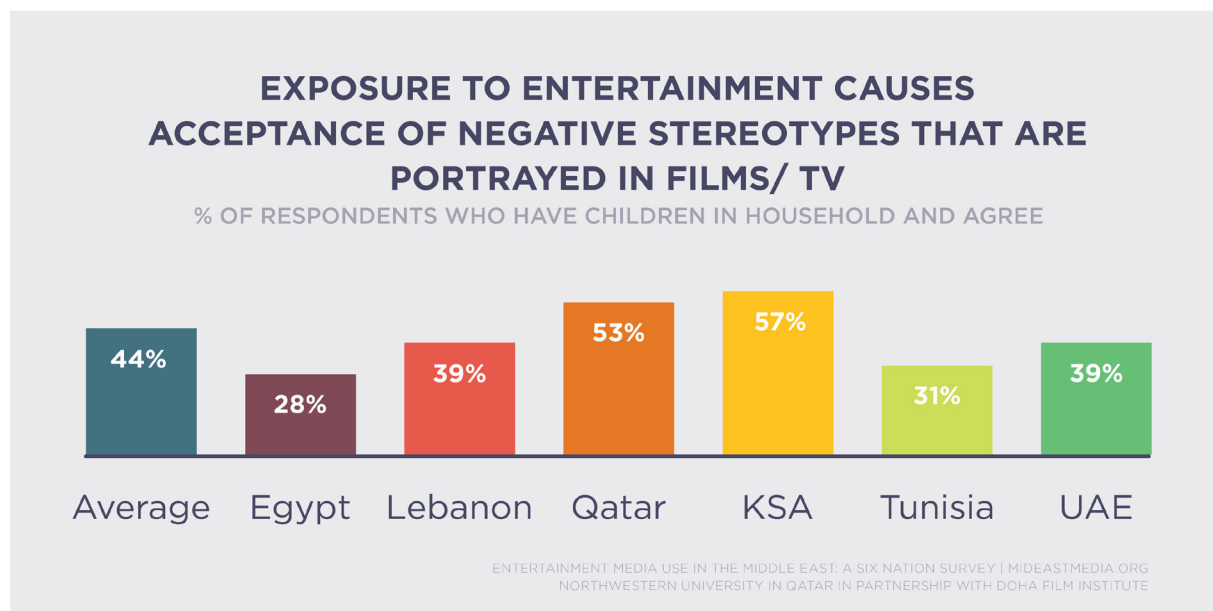
There also is a clear belief among respondents in households with children that exposure to entertainment media helps children better socialize with others; almost two-thirds of respondents in the survey with children in their home agree with this sentiment (62%). This positive impact on socialization is seen in all six countries, but is felt most strongly in Saudi Arabia (73%), less so in Lebanon (44%).

The positive connection between entertainment media and socializing with others was reported by all age groups and those at all levels of education, but

media helps children to learn skills needed at school (55%). Those in Saudi Arabia and Qatar believe this more strongly than those in other countries (70% and 65%, respectively), particularly compared with Tunisia, where only a quarter accept the connection (25%). The general acceptance of the beneficial effects of entertainment media on school behaviors is reported among all age groups in the MENA region and by those with a general level of education (more than primary school) Only a third with a primary education or less agree (35%) compared to more than half of those with more education.

U.S. and European expats in the MENA region are more likely to report a positive impact on skills for school than Arab nationals and expats (82%, 50%, and 54%, respectively).

## STEREOTYPES AND MORALITY



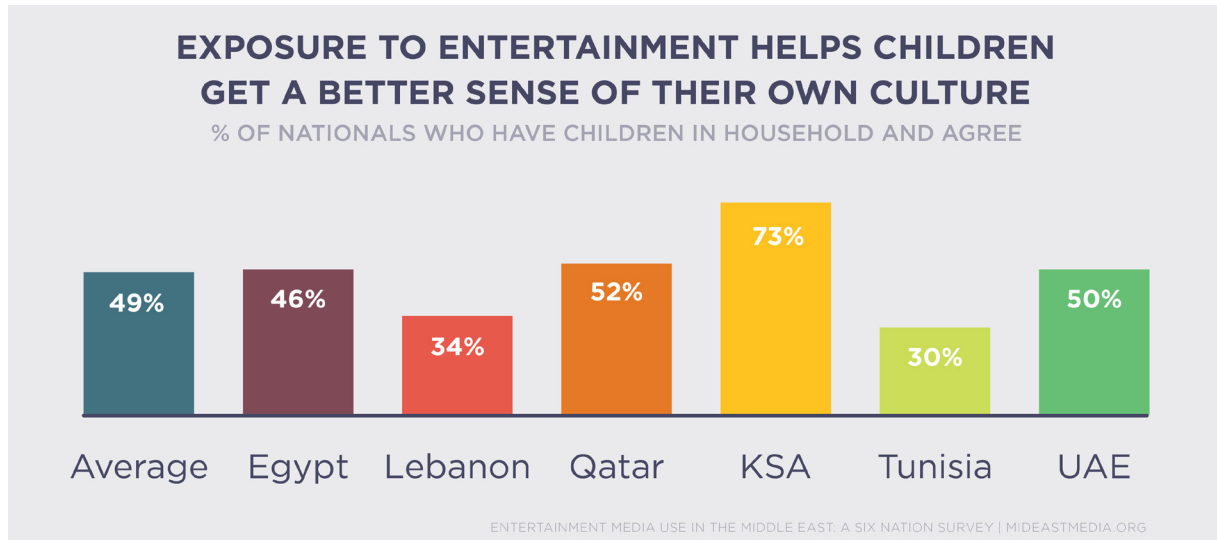
Those in homes with children express some concern about the negative impact of children's entertainment on morality, stereotypes and culture. A plurality of respondents in households with children believes film and television reinforce negative stereotypes and encourage children to accept them (44%); 19% reject this notion. Residents of Saudi Arabia and Qatar, again, feel more strongly about this than those in the other four countries surveyed (57% and 53%, respectively). Those with higher levels of education are more likely to agree that negative stereotypes are reinforced by entertainment, while all age groups hold similar views on this subject.

A strong plurality also accepts that exposure to entertainment media makes children desensitized to violence (41%), while roughly a quarter disagree (22%).

This sentiment applies to all age groups, but is felt more strongly among those with more than a primary school education. Looking across countries, it is felt most strongly among respondents with children in the household in Qatar and Saudi Arabia (52% and 56%, respectively).

Those taking part in this study are somewhat ambivalent that exposure to entertainment media adversely affects their children's sense of morality or teaches them "wrong values." A third of people in households with children accept this connection as likely (37%), and the same proportion clearly rejects it (33%). Those in Qatar and Saudi Arabia, again, express more concern about the impact of entertainment on morality (57% and 51%, respectively). Only 16% of Egyptians with children in the household believe in such a connection.

## CULTURE



Those with children in the home clearly feel exposure to entertainment media helps children become more tolerant of other cultures; roughly two-thirds feel this way (64%). A belief in the tolerance-enhancing effects of entertainment media was reported in all six countries, especially in Qatar and Saudi Arabia (74% and 69%, respectively, agree). The same belief is very strong among US and European expats—83% agree—and also is felt by a clear majority across all nationalities.

The corollary to learning about other cultures through entertainment media

is the opportunity to get a better sense of one's *own* culture, or, conversely, to become detached from it. About half of participants in this study with children in the home feel entertainment media help children get a better sense of their own culture, a much higher proportion than the third who express the opposite concern: that the exposure could weaken a sense of their own culture (52% better sense of culture vs. 34% weakened sense of culture). Expats more consistently acknowledge positive effects of entertainment media on children's cultural learning.



# Conclusions

## CONCLUSIONS: THE BENEFITS AND PROMISE OF MEDIA USE RESEARCH ON ENTERTAINMENT

While most research on media behaviors in the Middle East lives in the context of earlier work, as our literature search indicates, we believe this study of entertainment media advances the conversation beyond work previously done in its focus, scope, size and timeliness. It also takes on a specific media-centric approach, rather than simply considering formal communication as a minor aspect of culture and cultural production. This study was specifically designed to understand Arab media audiences and their choices, a central concern for both a school of journalism and communication such as NU-Q and a cultural institution such as DFI. The two sponsoring institutions aim to generate intelligence that serves their primary constituents—students, scholars, policymakers, industry professionals and, ultimately, media audiences themselves. Thus the focus of the study is clear and relates closely to NU-Q's 2013 study, *Media Use in the Middle East*.

The scope of the study is distinctive: six Arab countries spanning the region (Egypt, Tunisia, Lebanon, Saudi Arabia, Qatar and the UAE). Much qualitative research in the Arab world, while valuable, is either broadly conceived to reflect all Islamic or Arab media, or narrowly focused on a single country or part of the region. The size of the sample here—more than 6,000 face-to-face interviews—is notable in an era when researchers necessarily take shortcuts with smaller sample sizes for personal interviews or conduct less rigorous investigations via online surveys. A study like this is costly in terms of time and resources, but worth the effort by dint of the rigor of the research and the disciplined results. This study also offers topicality—it is current in the content of its questions in the years after the Arab uprisings, but also broad enough to inform recent survey research from commercial sources.

This research is timely, and is presented in

the tradition of what media scholars Kurt and Gladys Lang in some of their own seminal work called “firehouse research.” This is not a denigrating term, but one that recognizes that some research needs to be reported and made available promptly to have maximum value. Only a few institutions are capable of timely research and most are in the commercial sector. The interviews that yielded the survey data in this report were carried out in early 2014 during a prescribed time period, and are being reported by mid-April, not just at a scholarly meeting, but in published digital and print form. Following the April 2014 public release, the research will in coming months be presented at scholarly meetings, and many of the findings and data will be used by scholars in various published studies and in the secondary analysis of data. We believe this timely work in a fast-changing part of the world renders a public service and is offered for assessment and critique.

Thus, the purpose of this research is to be useful to both academics and professionals, which we believe have symbiotic though sometimes different applications. To people working in media industries, this study is a map of an audience that may prove helpful in calibrating content creation, moving beyond intuition to more empirical knowledge. For policymakers, a study of this kind addresses issues of freedom and control of communication, and offers something of a plebiscite on the expectations people have for government, or commercial guidance, for example in the regulation of violent or explicit media as they affect children. For other interested users, the material here builds on the theoretical formulations of uses and gratifications research making a practical connection in the contemporary Middle East.

Inasmuch as other large-scale studies are often proprietary, this is an offering to the

# CONCLUSIONS

several publics addressed here. We also offer an in-depth online interactive that helps viewers and readers get inside the data and make their own comparisons and assessments.

In this context, we are ourselves gratified by the finding that the interface between tradition and modernity need not always be conflictual, nor is it a zero-sum game. As our 2013 study indicated, residents of Arab countries are less supportive of government regulation of the Internet (50%) than they are of regulation of violent and romantic content (74% and 69% respectively) measured in this 2014 study. In Arab societies, available content often comes from non-Arab sources, and audiences express the desire for more Arab-produced content.

This study suggests that news and entertainment are not always separable. Across the globe there is a convergence and blending of information and entertainment, even spawning the genre of infotainment. Respondents often list news as one of their favorite entertainment genres, for example, as did 51% in Lebanon,

44% in Qatar and 40% in Tunisia.

A study like this one, while comprehensive and highly detailed, nonetheless suggests other avenues of research, notably inquiry into children's media habits. Given the large number and percentage of young people under 18 in Arab countries and their fondness for modern media, this is an important demographic for the study of entertainment audiences.

The findings and analysis in this study will inform the classrooms at NU-Q and other universities in the region and globally, particularly as anyone with an Internet connection can access the data via our online interactive. If past experience holds, the study will also find its way into the executive offices and management of media firms. Research like this captures a moment in time. Some of it may have lasting value, while other aspects may be quite ephemeral. We attempted to ask both evergreen and topical survey questions, thus maximizing the chances for a long and useful shelf life, to be augmented by additional research—ours and that of others.





# Appendix A: Literature Review





## LITERATURE REVIEW

Studies of Western culture claim routine, everyday content—even weather reports and sports coverage—can shape national identity and worldviews as much or more than conflict coverage (Billig, 1995). Psychologists, meanwhile, have found that entertainment content viewed on television, including fictional content, is an important form of persuasion. According to this argument, entertainment influences normative attitudes as well as values and beliefs (Shrum, 2012). Scholars grapple with comparable questions of Arab popular culture. As Naomi Sakr cautioned, a lack of empirical audience research in Arab countries leaves observers vulnerable to false assumptions and hopeful clichés about the influence of mass media (2007). Understanding the diverse region through mass media entails assessing a wide spectrum of what is popular to whom, how and why it is produced, distributed and consumed, and what it means: taped sermons and hip-hop, comedies and video clips, Ramadan dramas, video games, soccer matches and racing, *Million's Poet* and *Arab Idol*.

## SURVEYING ENTERTAINMENT MEDIA USE AND MOTIVATIONS

Scholars have advanced key theories to distinguish what drives recreational media use from what drives news consumption. Some studies express this dichotomy as ritualistic (entertainment) versus instrumental or goal-oriented (news); another way to conceptualize this difference is media consumption for an intrinsic reward (entertainment) versus an extrinsic reward (news) (Kwon et al., 2014). The paradigm these theories share is that they are audience-focused. This revives the tradition of uses and gratifications theory of media effects, a subfield with new applications in the study of hypermedia (Sundar & Limperos, 2013; Ruggiero, 2000).

A significant portion of the research on entertainment media use worldwide has been youth-oriented. In analyzing comparative media consumption, this is a useful demographic for the study of Arab media trends, as an estimated 55 percent of the MENA region's population is under the age of 25 (US Census Bureau). Moreover, youth tend to be early adopters of technology in general, and the presence of teenagers in households is a variable which, combined with mobile Internet access, tends to narrow the so-called digital divide across income levels (Madden et al., 2013). At the same time, media studies of Western youth and those of Arab youth have sometimes had different premises.

The research questions of Western media researchers have often focused on negative media effects. As such, entertainment media studies have sought to assess the impact of violent or sexual media on children, or of the number of hours spent consuming electronic media on sociability. Such studies have investigated, for example, the correlation between students' media consumption and academic performance (Common Sense Media, 2012), and the association between TV advertising and childhood obesity (Zimmerman & Bell, 2010).

Likewise, surveys of adult TV and online media usage have investigated negative effects such as diagnoses of Type-II diabetes and cardiovascular disease (Grantved & Hu, 2011), and the extent to which computer use replaces other activities, whether work, physical exercise, face-to-face socializing or sleep. Data from the US Bureau of Labor Statistics' American Time Use Survey (ATUS) for 2003-2011 suggested that every minute Americans spent in online leisure activity corresponded with an average decrease of .29 minutes spent on other leisure activities. The "crowdout" effect decreased with age, but online leisure time generally climbed year by year across age groups (Wallsten, 2013).

## ENTERTAINMENT MEDIA USE IN ARAB AND MUSLIM COUNTRIES

A sizeable amount of research on how media use in the Muslim world compares to other locales has come out of Turkey. A study of sedentary behavior among Turkish youth found that overall screen time rates were lower than that for adolescents in Europe and the United States. The authors attributed this finding to fewer computers per capita in Turkish households, and longer hours Turkish students spend in high school studying for university entrance exams. In considering other factors, the study also concluded playing sports was not a significant factor in hours spent on media use, but that males and students attending private school were the groups that spent the most time using computers and playing video games. Public school students, conversely, spent more time watching TV (Ayda Karaca, Caglar, Bilgili & Ayaz, 2011). Researchers examining Turkish university students' new media usage have developed new ways to gather data. One study conducted a content analysis of the most-followed campus Twitter pages, comparing not only postings by subject matter but also the tools used and the responses to the tweets, concluding that Twitter was a highly effective means for universities in Turkey to create community (Yolcu, 2013).

An earlier study of Turkish university students examined how entertainment and social media use affected interpersonal relationships and socializing with family. The study, which also attempted to explore effects of globalization by media technology, used a questionnaire completed by students, ethnographic field observations at three Internet cafés near a large university, and in-depth interviews with a small sample of students. The study concluded Internet café usage correlated with an orientation toward Western culture. Entertainment media usage was associated with less face time with family and friends, even as online communication increased the quality of social networking

with friends (Koc & Ferneding, 2007).

Time spent online, however, does not necessarily indicate bowling alone. One survey exploring use of commercial websites in Egypt found the primary motive for visiting commercial websites was not online shopping, but entertainment, information-seeking and social connections (Mahmoud, Klimsa & Auter, 2010).

Like Turkey, Indonesia presents media researchers with a changing social dynamic in a Muslim country. Indonesia was considered a sweet spot for web-based businesses and a saturated media environment for youth in cities such as Jakarta. The research concluded that social norms were not what drove adoption of social media, but rather that usefulness and ease-of-use were major factors (Simodra & Mariani, 2013). Another recent study of Indonesian youth analyzed variables of gender and social status in examining how much time and money were spent on which types of mass media, including gaming and social media, and for which gratifications. Television was the top platform, but one of the conclusions was that mobile phone use may soon displace traditional TV (Hendriani et al., 2012).

Global surveys of entertainment media use have found commonalities as well as significant geographic differences. A worldwide entertainment media study of China, the United States, India, Korea, Turkey, Brazil, the United Kingdom and Germany found respondents just as likely to share information about entertainment online as they were to share details about themselves or friends. However, the most popular form of content varied. For the United States and the United Kingdom, it was TV; in Turkey and India, music; in China and Brazil, online videos; in Germany, movies (Edelman, 2013). Clearly, these variances between nationalities (and within nationalities) must be kept in mind when

surveying and interpreting the MENA entertainment media picture.

A significant share of existing quantitative study of Arab entertainment media use has been market-based and proprietary. By definition, the goal is to predict how best to cultivate consumer markets seen as greenfields of demand. This goal applies not only to wealthy countries such as Saudi Arabia and Qatar with their young, educated webizens, but also to countries such as Egypt with comparatively low Internet penetration and vast potential for growth. This polarity makes regional generalizations about entertainment use inherently problematic. A 2013 study conducted by Northwestern University in Qatar found Internet penetration in the UAE was around 91 percent compared to 22 percent in Egypt (Dennis, Martin & Wood).

Since the Arab uprisings, several large-scale surveys included entertainment media use in cross-national snapshots of media use. An attempt by Google to measure media use in nine Arab countries reflected the digital migration of technology reported elsewhere. Eighty percent of respondents said they would rather give up TV than the Internet if forced to choose. A majority said they rarely or never paid to download entertainment content, and 85 percent spent less than an hour per day with print media, a figure lower than most global benchmarks. More than a third of respondents said technology had weakened family cohesion (Booz Allen Hamilton and Google, 2012).

Studies of social media in the region have suggested that while the rate of growth has slowed, as of the first half of 2013 it was still perhaps the highest growth rate in the world. Facebook adoption in the MENA region outpaced all other locales (Mourtada, Salem & Alshaer, 2013). Between June 2012 and May 2013, Facebook users across the Arab region increased from 45 million to 54.5 million. Egypt more than doubled its Facebook users and Saudi Arabia and the UAE grew by 50 percent, according to the 5th Arab Social Media Report by the Dubai School of Government. At the same

time, the Arab region held the number two spot worldwide in YouTube video views, with 285 million videos viewed daily and more than two hours of video uploaded per minute. Saudi Arabia led the region in playbacks, followed by Egypt and the UAE. Half of video views in Egypt were from mobile devices; in the UAE the figure was 40 percent (Mourtada, Salem & Alshaer, 2013).

A Twitter use study, which included the then-22 countries in the Arab League plus Iran, Israel and Turkey, examined a sample of 733,000 Twitter users and 2.47 million tweets to estimate total use and to identify countries of origin by using geo-location services for a random subsample. This snapshot suggested that in the Arab world there were 3.7 million Twitter users by 2013 (logging in at least once a month) and that half were in Saudi Arabia (Mourtada, Salem & Alshaer).

One reason it has been difficult for researchers to situate trends in new media is a relative paucity of data on traditional media behavior. Film is a case in point. Despite substantial attention devoted to a cinematic revival in many Arab countries, there is comparatively little publicly available data on movie-viewing, especially in cinemas. A lack of cinema-going data is one of the gaps in the research literature this study explicitly addresses. The prevalence of cinemas is one of only a few available metrics. As of 2010, there were an estimated 400 movie theaters in the MENA region (Chudy, 2010), compared to 5,000 in Europe and 6,500 in North America (IHS Screen Digest). In the MENA region, there were 11 IMax theaters as of 2012, compared to 660 worldwide (Flanagan, 2012). As MENA Cinema reported, alternative viewing practices have emerged because theater attendance is often not the most desirable way to see movies. Theaters in some Arab countries are dilapidated, multiplex construction was in the hands of a few companies, and 3-D projection facilities were not a priority. There is a need to map film-viewing patterns via free and on-demand TV, DVDs, cinema festivals such as those held in Doha and Dubai, and

Internet streaming and downloads (MENA Cinema, 2013), which this study does.

Likewise, sports media consumption patterns in the region have received scant attention, in spite of ambitious construction programs in the UAE and Qatar in preparation for the 2022 World Cup. Most public research on sport in the region has been theoretical, concerning the prestige and soft diplomacy aspects of spending on athletics infrastructure. There has been some effort to interpret marketing data to predict how income, education and foreign nationals factor into patterns of Arab sport media consumption but this has been narrow and limited in

scope (O'Connor, 2011). Among many other things, the current study assesses overall sport viewing, willingness to pay to stream/download live sporting events, popularity of sports video games, and how frequently respondents play sports themselves.

In many ways, the literature suggests that greater empirical research on entertainment media use in the Arab world would fill an important knowledge gap. Scholars argue compellingly that the study of entertainment media's role in cultural production, rather than serving as an addendum to the study of the news media, may lend greater insight into how consumers live in environments undergoing rapid change.

## FRAMEWORKS FOR ANALYSIS OF ARAB ENTERTAINMENT MEDIA

The complexity of entertainment markets in the Arab world, a term that connotes a monolithic regional culture, is illustrated in the challenge of dubbing TV for regional distribution. The success of a show, as producers know, can depend on the right choice of dialect: classical Arabic for historical dramas and children's programming, Syrian vernacular for soaps, Egyptian dialect for comedies (Spindle, 2011). When the common language that ostensibly binds the region together is thus complicated, one question is what transnational audiences have in common in the region. With the rise of transnational satellite TV, scholars including Shibley Telhami and Marc Lynch have seen a New Arabism that is more market-driven and consumer-oriented than Nasser's state-initiated Arabism of the 1960s (Boyd, 1999).

Although Arab entertainment media

studies, including studies of youth, have examined potential harmful and beneficial effects of content, the broader corpus of research has analyzed the interplay of culture, commerce, religion, politics and the implications of consumer choices therein. In other words, particularly in the context of autocracies, revolutions and counter-revolutions, media studies are not just about audience and content, but discourse and political economy as well. Demonstrating how these forces were inseparable in the struggle over government control and censorship in places such as Saudi Arabia, Sakr and Marwan Kraidy have examined organizational relationships between ownership and media regulations to provide a more complete picture of how and why cinema and satellite TV began to change the Arab media landscape (Sakr, 2007; Kraidy, 2010).

## DYNAMICS OF CONSUMER DEMAND

A conspicuous case of audience choice in Arab countries has been the proliferation of free satellite TV. Anthropological research in Tunisia suggests these broadcasts have created a de facto cultural community or “satellite umma” in which viewers can elude some censors and vicariously experience freedom from government propaganda and social control (Chouikha, 2007). Researchers have explored the phenomenon of some 70 Turkish TV shows broadcast in 40 countries, half of those in the Arab League, epitomized by the soap opera *Nour*. The show, which premiered on MBC in 2008, brought an estimated 85 million new viewers over age 15 to the network, half of them women.

A 2013 Pew study comparing attitudes toward Western and Bollywood entertainment sought to tap perceptions of imported entertainment and perceptions of imported media’s effects. The study also correlated attitudes toward media with levels of religious devotion. The survey asked respondents if they liked Western or Bollywood entertainment, and also asked whether such content “harms morality” in their country. In the Middle East and North Africa, less than half of those surveyed had a favorable opinion of Western entertainment (except for 52 percent in Morocco), and the majority said it was harmful. Dissonance was visible, as a significant majority of those who liked Western entertainment also believed it to be harmful. Entertainment from India, in contrast, earned higher approval in general and was deemed less harmful (Pew, 2013).

Transnational programming allows Arab audiences to experience different lifestyles and worldviews, but there are varying levels of cultural distance. Syrian content, for example, may historically have been secular, but is still Arab and, perhaps, less threatening (Chouikha, 2007). Turkish drama may be non-Arab and Westernized, but it is still Muslim (Yanarda & Karam, 2013). And Bollywood is perceived by many to be in closer cultural proximity to the Arab world than Hollywood (Pew, 2013).

Scholars have wrestled with the implications for national and cross-national identity in the Arab world. In *The World Through Arab Eyes*, Shibley Telhami focused on the conditions that affect Arabs identifying themselves first as Arab—Muslim, Christian or otherwise—or as a citizen of, say, Morocco, Egypt or Lebanon. He argued that “as Arabs have had more access to media from outside their borders, their identification with their own states has declined” (2013, p. 25).

In the context of some MENA countries, particularly where there has been rigid censorship, the supposed clash between globalization and indigeneity appears to be a false dichotomy. Hip-hop artists and mass youth movements such as mahraganat (festival) music in Egypt, where half of the population of 85 million is under age 25, are in marked contrast to slick Egyptian video clips filmed on luxurious sets, increasingly out of touch with the reality of ordinary people’s lives (Hubbard, 2013). Scholars argue that in this context, indigeneity stems from circumventing censorship. In a study of Islamic counter-publics created by sermons on cassette, Hirshkind (2006) argued sermon listening constituted passive resistance to state attempts to silence religious figures, using technology available to ordinary people outside the consumer culture.

When events unfold and spread as quickly as the Tunisian revolution did, scholarly analysis of the impact of grassroots cultural forces sometimes lags behind the popular and trade press. This is notable in regard to Arab cinema: Independent filmmaking in some countries has long been a largely underground enterprise (Vivarelli, 2012; Bharadwaj, 2012). Even though communication scholars have produced sophisticated critical and cultural analyses of New Wave Arab cinema and the often precarious situation for filmmakers (Khoury, 2005; Cieko, 2007; Seymour, 2008), research has not caught up with audience and viewership.



In contrast, journalistic coverage has more quickly reflected the changing media landscape for filmgoers in Arab countries and contemplated ongoing challenges. A renewed interest in Arab cinema, despite difficulties and dangers of filming and screening due to censorship and conflict (Jaafar, 2006), was a trend some traced back to the 2006 Egyptian film *The Yacoubian Building*. Filmmakers have discussed barriers to movie attendance in Arab countries, including uneven access to movie theaters outside major cities, in addition to the challenge of expectations of viewers accustomed to major Bollywood and Hollywood productions (Bharadwaj, 2012).

Although recent offerings in Arab cinema

demonstrated an ability to capture and express uprisings sweeping the region, distributors have spoken of the need to have non-repetitive content. Independent movies, sales agents have said, did not necessarily reflect the desires of moviegoers, who in Jordan were asked to pay USD \$11 for admission, a high price in a middle-income state. Audiences wanted traditional drama, romance, comedy and human interest. They were less interested in movies about social issues and war that focused on, in the view of one producer, “selling Arab identity to the world” (Bharadwaj, 2012). One of the questions the current study asked respondents was whether they felt filmmaking should depict society’s problems.

## HISTORICAL TENSIONS IN POPULAR CULTURE

An area of dissonance between what many in the Arab world profess and what they do is seen during Ramadan, when up to 81 percent of TV viewers in the Middle East alter their consumption patterns (Arab Advisors Group, 2011). Television viewing increased 30 percent across the region in 2011 during Ramadan (IPSOS, 2011), and viewers associate the season with TV dramas known as *mosa/salat*, serials in the form of historical epics. The phenomenon dates from the 1960s, but gained salience in the 1990s with the rise of pan-Arab TV (Detrie, 2012). Media habits during Ramadan are also measured in the current study. “In the pre-satellite era,” write media scholars Marwan Kraidy and Joe Khalil, “state broadcasters served captive national audiences...Since the 1990s, taking advantage of new operational scales enabled by satellite technology, entertainment channels have expanded the reach of Arab television,” (2009, p. 33)

While Ramadan is a time of devotion and abstinence, it is also a time associated with conspicuous consumption, both in feasting and viewing TV specials calculated to sweep ratings and advertising revenue. The dilemma may be

familiar to many Western Christians who rue the commercialization of Christmas. In manifesting cultural tensions, Ramadan consumption serves an important counter-public function, in that it enables a “discourse of disapproval” (Ambrust, 2002). Hroub (2012), however, notes that the last few decades have experienced a surge in religious broadcasting for all Abrahamic faiths, and an uptick in the religious TV offerings during the month of Ramadan has been observed by a number of scholars.

Prior to the current crisis, Syrian epics had been an example of a popular genre that stimulated political discussion and eluded some attempts at censorship. In contrast, Egyptian content was subject to heavy government censorship by the Committee to Choose Ramadan Productions, formerly, the High Drama Committee. Partly in response to criticism from religious and state authorities, commercial producers sought non-controversial programming. Such censorship led to “safe” programming and public complaints of mediocrity, with audiences becoming impatient with bland, perfunctory dramas when satellite gave

them many other choices (Lindsey, 2005).

The past is political, and this is a persistent theme in the formation of Arab identity and the role of Arab mass media. A study that incorporated interviews with video game users and producers looked partly at how games such as *Special Force* and *Under Ash* and *Under Siege* disseminate ideology, employ national meaning and either reinforce or challenge dominant ideas. These Hezbollah and Syrian-produced games used real-life scenarios like Hezbollah operations in southern Lebanon and the Israeli-Palestinian conflict, respectively, to give players a chance to reverse historical events in which Arabs were on the losing side (Tawil Sourì, 2007).

Modern Arab war games such as *Under Siege* were widely misconstrued by Western media in stereotypical terms, even though they were similar in format and objective to war games popular in the West. Yet the game that stirred controversy in the Arab world itself was the ancient Arab history represented in *Quraish*, set in the First Century. Conservative clerics objected to the depiction of Islamic history, but audience response was positive. Designer Afkar claimed the game was downloaded more than a million times, at a time when the typical modem speed in the region was a sluggish 28.8 kb per second. Interviews with

gamers, parents, designers and merchants suggested the game fulfilled a competitive need for Arab youth, and provided a role-reversal that turned historical defeats into virtual victories (Halter, 2006). The current study considers video gaming an integral part of the modern media environment, and gaming behaviors are included in the survey.

In a related example of graphical entertainment media, the hit Arab comic book series *The 99* illustrated not only the importance of historical themes but also mass media's role in advancing a counter-narrative. Drawing historically on the golden age of Arab civilization and the Mongol invasion of Baghdad in 1258, *The 99* was being prepared for global distribution in animated form. The series, by Kuwait's Teshkeel Media Group, inspired merchandise and toys, an animated TV series and video games, as well as the construction of theme parks. In 2009, there were attempts to ban the comics, based on the objection that superheroes were blasphemy: The heroes call upon each other's superpowers for help rather than praying for assistance from the almighty. But one study of the plot line driving the series argued the content was consistent with Arab and Islamic values, as the overriding goal of characters was recovery of the wisdom of ancient Arab civilization (Deeb, 2012).

## DYNAMICS OF CHOICE IN MEDIA CONSUMPTION

Studies have suggested the MENA entertainment picture is market-driven and consumer-driven. New markets and technologies create consumer demand; consumer demand brings competition for content. Sports viewing is an example. In considering the UAE's infrastructure spending toward the goal of becoming a world sport capital, competition between satellite TV giants for broadcast rights created a renewed appetite for spectator sports in the Arab world (Madichie, 2009).

Audience-driven programming is also apparent in the success of Dubai-based satellite network MBC, which overcame transnational challenges to attract a large and diverse audience. Producers, adapting the successful formats of programs such as *Who Wants to Be a Millionaire* and *American Idol* to appeal to Arab audiences, developed a simple strategy: They ensured a cultural mix by auditioning contestants in more than a dozen countries across the region. Driven by commercial interests, the network overcame language barriers and sought to avoid cultural and religious taboos that would have offended viewers (Chetwynd, 2012).

In this atmosphere, cultural moments and political events sometimes overlap. A playful reference to a contestant on *Star Academy* became a subversive message for a placard in a civil uprising (Kraidy, 2010).

The Kuwaiti Ministry of Information moved to ban Scope TV's Sootik Wisal after the show parodied council ministers. The decision met with ridicule from Shamael Al-Sharikh of the *Kuwait Times* (2009). Under the headline, "Get Out of the Kitchen," the columnist solicited audience feedback. "Most of the viewers I have spoken with found the show to be funny, not offensive," Al-Sharikh wrote, adding the head of Kuwait's General Assembly himself was "impressed" with the actor who impersonated an official. In Egypt, in the idiom of an economic downturn, the revolutionary chant "The people want the fall of the regime" became "The people want five pounds cell phone credit" in the hip-hop lyrics of Egypt's Okka and Ortega, who had started out recording in Internet cafés. This came to approximately 70 cents. The implication appeared clear. In the currency of the day, bare necessity consisted not of bread alone. It was self-expression and freedom from control, measured by an ability to connect with others.



## ATTITUDES TOWARD CENSORSHIP

Attitudes toward freedom of speech are never absolute. If one surveys Americans on the value of the First Amendment, many respondents will say they support the 40-odd words without question. Ask US parents whether Howard Stern should be broadcast on public airwaves during after-school hours, however, and they may begin to qualify the Constitution's clauses. So, too, do respondents in the Arab world differ in their attitudes toward censorship and free speech, depending on what they are asked. Pew (2014) asked respondents in four Arab countries (and 18 others) whether "it is important that people have access to the Internet without government censorship." Almost all respondents in Lebanon and Egypt agreed (86 percent and 83 percent, respectively). A majority of survey participants in Jordan and Tunisia also agreed (69 percent and 56 percent). In a four-item index of "support for democracy," which included the prompt, "Freedom of the press without government censorship is very important," Tessler (2002) found that 60 percent of Palestinians were supportive of basic democratic ideals.

Dennis et al. found, among a sample of more than 10,000 respondents across eight

Arab countries, that 61 percent agreed with the statement that "It is OK for people to express their ideas on the Internet, even if they are unpopular." Agreement dropped to 46 percent when respondents were asked whether "People should be free to criticize governments on the Internet," and 50 percent felt "the Internet in [their] country should be more tightly regulated than it is now." A study reported in 2008 asked 601 Arab journalists what the primary role of journalists was, and the number one response was to enact "political reform," (Pintak & Ginges). Answers are in the asking. Only 40 percent of respondents in the same survey said investigating the government was a primary purpose of journalism. The current study gauges respondents' attitudes toward censorship of entertainment in a number of specific ways, including asking whether they desire greater regulation of violent and romantic content, wish the government would do more to protect their children from dubious content, believe it is acceptable to delete entertainment scenes some people may find offensive, and feel whole films should be banned if some members of the public object to the content.



# Appendix B: Related Research

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