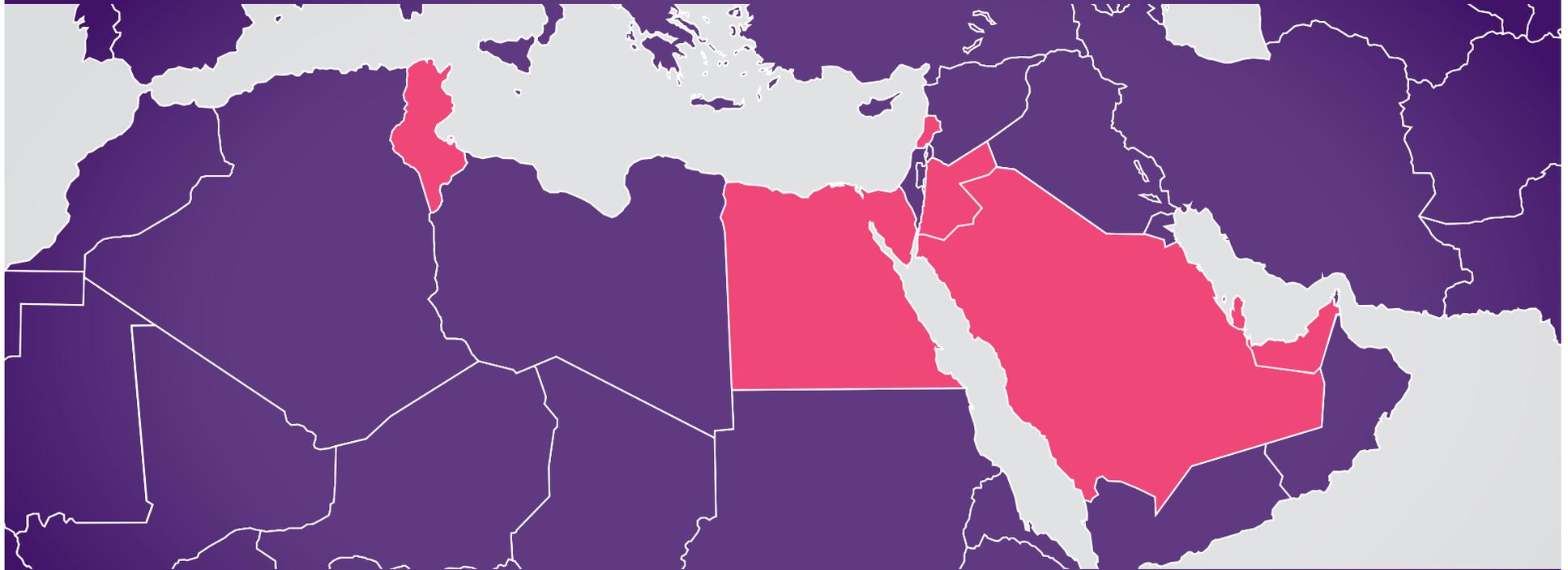




NORTHWESTERN
UNIVERSITY
IN QATAR



USE IN THE MIDDLE EAST MEDIA USE IN THE M
T MEDIA USE IN THE MIDDLE EAST MEDIA USE IN
IN THE MIDDLE EAST MEDIA USE IN THE MIDD
ST *A Five-Year Retrospection* IN THE MIDDLE EAST ME
DDLE EAST MEDIA USE IN THE MIDDLE EAST MED
THE MIDDLE EAST MEDIA USE IN THE MIDDLE EA

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

MEDIA USE IN THE MIDDLE EAST

A Five-Year Retrospection

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

mideastmedia.org

This publication was made possible in part by NPRP grant #7-1757-5-261 from the Qatar National Research Fund (a member of Qatar Foundation). The statements made herein are solely the responsibility of the authors.

TABLE OF CONTENTS

6	Foreword
8	Method

10	Media Behavior
18	Internet Use
26	Social Media
32	News Consumption
44	Political Expression on the Internet
50	Online Regulation and Privacy
56	Entertainment and Cultural Preservation
64	Change in Qatar

78	Summing Up and Moving Forward
-----------	--------------------------------------

FOREWORD

Probing how people use media in their daily lives in concert with their views about media is central to understanding the communication ecosystem, whether in a given region or globally.

With that recognition, in a quest both for new knowledge and useful information, Northwestern University in Qatar launched the first of five Media Use in the Middle East studies, now a longitudinal effort, in 2013, after more than a year of planning. That effort has yielded five reports covering countries across the Middle East and North Africa, each replete with textured data and analysis. Now we go a step further with this five-year retrospective, covering the years 2013–2017, as a prelude to a projected three-year extension for the years 2018–2020, now underway.

This report offers a welcome chance to reflectively re-present data along with analysis. Over the first five years of this effort, we have developed a model for better appreciating Middle East/Arabic media and their audiences that has provided much-needed intelligence for teaching and further research as well as practical data for industry and public policy. Our studies have debuted on the world stage at academic and industry meetings and conferences, as well as inspiring secondary analysis and multiple publications. Concurrently the work has been a driver for thought leadership and received substantial coverage in popular, specialized, and industry media. The studies have consistently, year over year, looked at media behavior

across legacy and new platforms—especially social media, how and where people get their news and entertainment, the nexus between cultural traditions of the region, and comparisons among countries studied. With care, we have generalized about the Arab region itself, by virtue of a careful selection of countries from North Africa to the Gulf including media-rich and media-poor societies reflecting many differences that together provide a composite portrait.

Only at this five-year mark in what is a rare longitudinal study can we consider lessons learned comprehensively over time and determine the value of both relative stability and media shifts, whether incremental or dramatic. The study began in the wake of the Arab Spring and has tracked developments so that we can distinguish between the ephemeral, short-term effects and those that are longer lasting. In each of the reports, whether involving eight countries as the first one did, six in three subsequent years, and seven in the 2017 edition, we have witnessed the complexity, diversity, and change in media use patterns and in media themselves. Collectively, the study involves more than 35,000 face-to-face interviews (1,000+ in each country each year) in a region that has not previously had such a continuous and comprehensive assessment.

While considering several countries in each of the studies (focusing principally on news and information media in 2013, 2015, and 2017—and more on entertainment media in 2014 and 2016) we have

always had the State of Qatar as a central concern, positioning it in and against other nations. We do this because we are based in Qatar where there is an immediate and urgent need for high-quality data and because Qatar has the highest internet penetration in the world, as other respected studies attest. While fully independent and conducted rigorously without local or outside influence, we are nonetheless grateful to the Qatar National Research Fund for its generous support. Other significant funding has come from the Doha Film Institute and an in-kind contribution from Al Jazeera Networks. We are proudly a member of the World Internet Project (WIP) and are pleased that our data sets are now the sole source for the entire region in that biannual assessment. I am privileged to have directed these studies as lead principal investigator in league with Justin Martin and Robb Wood, and with assistance from two gifted research assistants, Mariam Saeed and Najwa Al Thani. Fieldwork and other expert assistance has been carried out by The Harris Poll, especially Kerry Hill, David Krane, and Elizabeth Sklar. Two continuous sources of encouragement and support have been Humphrey Taylor of The Harris Poll and Jeffrey Cole, director of the World Internet Project at the USC Annenberg School of Communication. We are also grateful to Elizabeth Lance, research manager, and to Nanci Martin, director of communications and public affairs at NU-Q, for their contributions to this report.

This five-year retrospective benefits from expert commentary provided by leading media professionals, researchers, and scholars, including Jeffrey Cole, director of the World Internet Project; Dima Khatib, managing director of Al Jazeera's AJ+; and Rami G. Khouri, columnist and commentator. Contributors from NU-Q are Banu Akdenizli, associate professor of communication; Ilhem Allagui, associate professor of journalism and strategic communication; Khaled Al Hroub, professor of liberal arts (international relations and Middle East studies); Justin Martin and Amy Kristin Sanders, both associate professors of journalism and strategic communication. Among this panel are authorities on Middle East media, media research, media law and ethics, digital and social media, and journalistic practice. They have lived and worked in Egypt, Jordan, Tunisia, United Arab Emirates, Turkey, Lebanon, and Qatar among other countries in the region. We are grateful to each for their succinct and insightful interventions.

As always, appreciating the lessons of this composite portrait and the five studies from which it is drawn is to realize the richness and complexity of the Middle East region, its people, and their media.

METHOD

The Media Use in the Middle East studies by Northwestern University in Qatar have been conducted annually since 2013. Each year, the survey was conducted face-to-face (telephone in Qatar) with the general population 18 years and older in six countries: Egypt, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates. Jordan was included in 2013 and 2017.¹ These countries were chosen to represent a broad spectrum of populations across the region. The surveys were conducted by The Harris Poll in conjunction with Pan Arab Research Center (PARC).

Each year the survey was conducted among 1000+ residents in each participating country (1,250+ in 2013). The respondents in each country include a mix of nationals and non-nationals, as applicable to their representation in that country. This report includes responses from nationals only in each country. A summary of completed interviews is as follows:

In 2013 and 2014, the first years of this survey, baselines were established for the role of traditional media such as television, newspapers, magazines, and film, as well as online media, social networks, and mobile media. In odd-numbered years (2013, 2015, and 2017), the survey focused on news, information, and internet activity. In even years (2014 and 2016), the survey included an expanded focus on entertainment media and culture. All iterations of the survey also include attitudinal variables on topics such as politics, culture, censorship, and privacy, among others.

This report focuses on trends over time, primarily comparing 2013 data with 2017, and 2014 data with 2016. Any comparisons including data from 2015, 2014, or 2016 do not include Jordan, as Jordan was not included in the survey in those years. Some comparisons do not include all countries if government approval required us to alter the wording or remove a question. These cases are noted in the respondent base. Of the seven countries surveyed in 2017, Egypt and Jordan required the deletion of some questions, and altered wording of a few others.

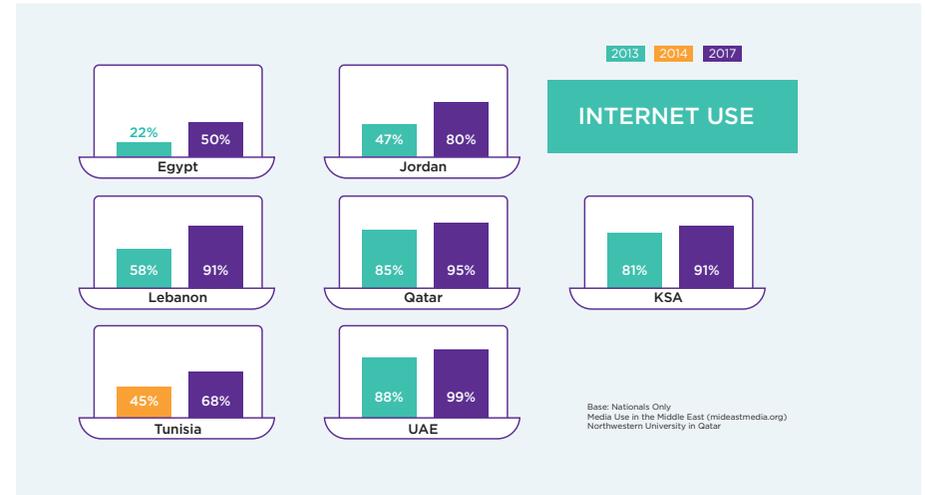
The full survey method and results for all survey years are available at www.mideastmedia.org.

COUNTRY	COMPLETED INTERVIEWS					COMPLETED INTERVIEWS BY NATIONALITY					
	2013	2014	2015	2016	2017		2013	2014	2015	2016	2017
Egypt	1,252	1,002	1,071	1,000	1,000	Nationals	1,252	1,002	1,071	1,000	1,000
						Non-nationals	0	0	0	0	
Lebanon	1,256	1,000	1,000	1,008	1,018	Nationals	1,232	1,000	995	1,008	1,018
						Non-nationals	24	0	5	0	0
Qatar	1,253	1,003	1,000	1,000	1,140	Nationals	352	407	280	504	508
						Non-nationals	901	596	720	496	632
Saudi Arabia	1,252	1,009	1,005	1,017	1,016	Nationals	848	622	633	616	627
						Non-nationals	404	387	372	401	389
Tunisia	1,250	1,016	1,012	1,016	1,000	Nationals	1,150	906	909	913	896
						Non-nationals	100	110	103	103	104
United Arab Emirates	1,264	1,005	1,005	1,017	1,013	Nationals	313	234	250	488	481
						Non-nationals	951	771	755	529	532
Jordan	1,250				1,009	Nationals	1,044				881
						Non-nationals	206				128
Total	8,777	6,035	6,093	6,058	7,196						

1. Bahrain was included in 2013 but is not included in this retrospective analysis as there is no longitudinal data for this country.



MEDIA BEHAVIOR

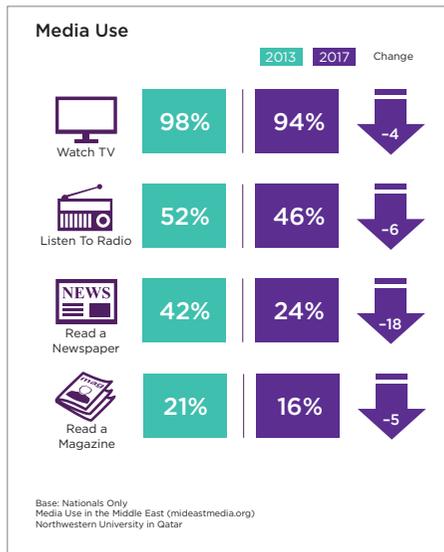


As internet access expands, media behaviors and preferences change.

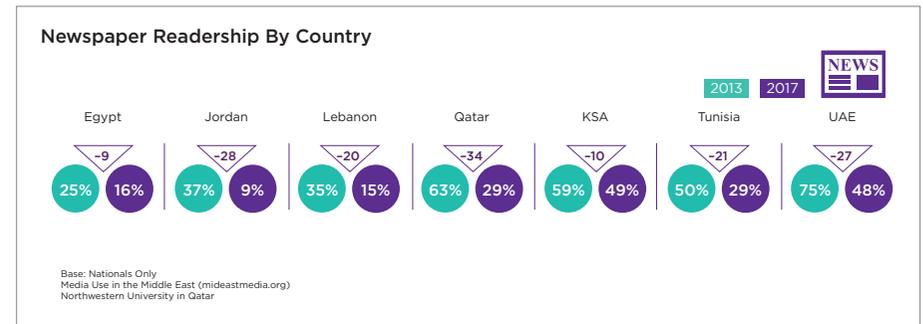
Perhaps not surprisingly, internet penetration has increased in every country in the region since 2013. In 2017, 77% of nationals surveyed said they use the internet—a significant increase from 2013, when just over half (55%) said they did so. Lebanon, Jordan, and Tunisia—where internet use had lagged—made impressive gains. The UAE, Qatar, Saudi Arabia, and Lebanon are now near full saturation. Egypt lags behind other countries in internet use, although it has doubled since 2013.

Internet use is most prevalent among younger nationals; 92% of those ages 18 to 24 say they use it. And while nationals ages 45+ are slower to embrace the internet, they were nearly twice as likely to use the internet in 2017 as they were in 2013, jumping from 26% to 48%.

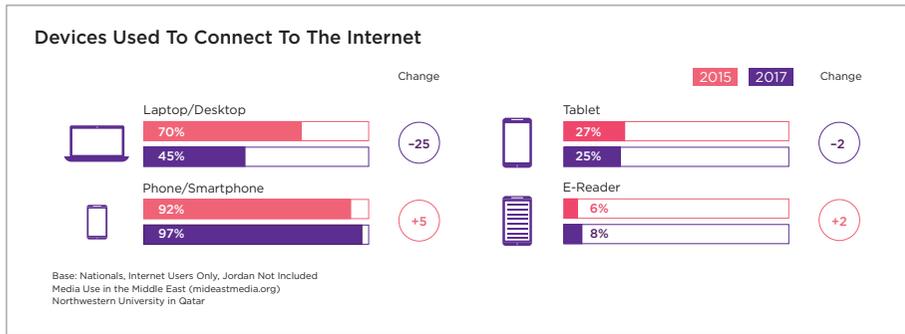
Among those who don't use the internet, the main reason they cite is lack of interest or perceived usefulness—35% cite this as the main reason they don't go online, up slightly from 32% in 2013. Only 6% say it's because they don't have a computer/device or internet connection available, down from 20% in 2013.



Internet expansion is significantly affecting legacy media use. In most Arab countries surveyed, fewer nationals are watching TV, listening to radio, or reading magazines and newspapers. While television has seen only modest declines—with the number of people who watch TV at all dropping just four points, to 94%—newspapers have been hardest hit. Just 24% of nationals in 2017 said they read newspapers in a typical week, down from 42% in 2013.



Jordan, Lebanon, Qatar, Tunisia, and the UAE all saw more than 20 point declines in newspaper readership between 2013 and 2017. Qatar saw the largest decline in readership, dropping by more than half. In 2013, 63% of Qataris said they read newspapers in a typical week; in 2017, just 29% did so. Nationals in Saudi Arabia and the UAE have the highest newspaper readership; nearly half say they read a newspaper in a typical week.



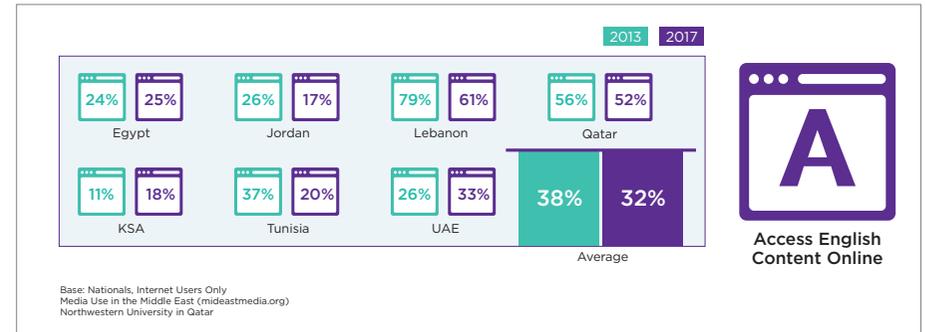
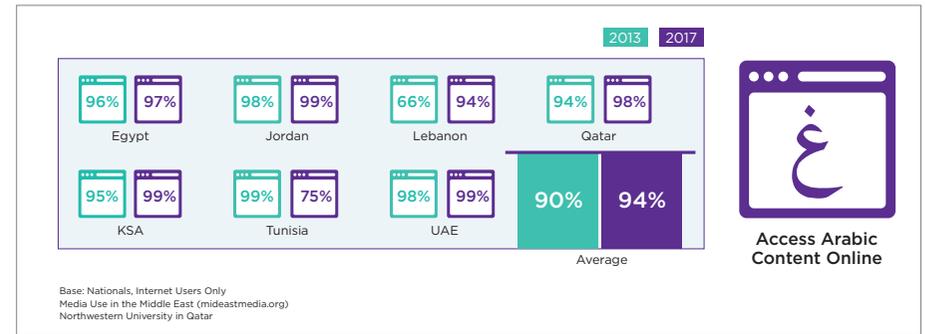
Smartphones are the go-to device for internet access.

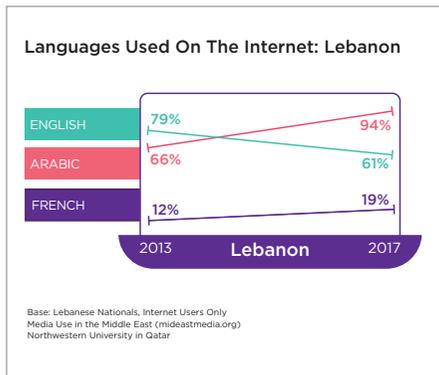
Arab nationals may be putting down their newspapers, but they are picking up their smartphones. On average, 97% of internet users say they use a smartphone to connect to the internet. In so doing, many are turning away from laptops and desktops as gateways to the internet. The number of internet users who listed a desktop or laptop computer as a device they use to go online plummeted from 70% in 2015 to 45% in 2017. Tablets and e-readers were less popular for internet use in 2013, and those numbers have stayed low: 25% and 8% say they use them for internet connectivity, respectively.

Arabic remains the predominant language for media use, while English is in decline.

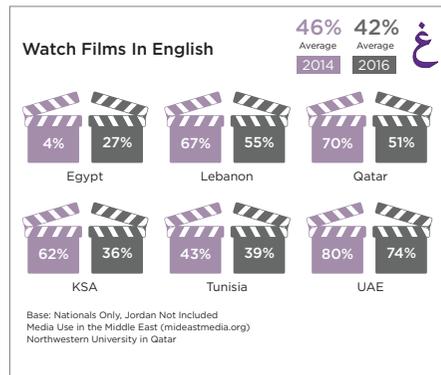
As internet use expands in Arab countries, so has use of Arabic-language media online. Among Arab nationals, 94% of internet users say they consume Arabic content online, up from 90% in 2013. One exception is Tunisia, which has a heavy French-speaking population. There, use of Arabic declined from 99% in 2013 to 75% in 2017.

Overall, the use of English online has remained steady or declined in most countries—32% of all Arab nationals who use the internet say they use English online, down from 38% in 2013.





In Lebanon, where the percentage of internet users jumped from 58% in 2013 to 91% in 2017, use of Arabic online also sharply increased—from 66% to 94% among internet users. By contrast, the share who access English content online in Lebanon fell from 79% to 61%. Use of French online rose from 12% to 19%.



In addition to using English less online, fewer nationals are watching films in English. In both Northwestern University in Qatar's 2014 and 2016 surveys, nearly all Arab nationals said they watch films in Arabic, while viewing of English-language films declined in almost all countries. Egypt was the only country where viewership of English-language films increased. Arabic-language filmmaking has experienced something of a resurgence in the past decade, which may let people inclined to watch Arabic films screen even more of them, and reduce either the appeal or necessity, or both, of English-language films.

MEDIA CONSUMPTION GOES MOBILE

Expert Commentary: Dima Khatib

The past few years have seen a tremendous change in media consumption worldwide. With internet-connected mobile phones being part of everyone's personal and professional daily life, media has also become mobile. Gone are the days when one would rush home to watch their favorite soap opera. Also gone are the days when one would just watch. Now consumers get to interact with content creators and other consumers, and even create their own content.

The Arab world has definitely been part of that transformation. Very high rates of youth in Arab populations mean higher consumption of mobile media. Sitting on a couch with your family to watch TV news is not considered fun anymore. In GCC countries it is not uncommon to see people sitting around a table in a restaurant, interacting with each other through their mobile phones, some with more than one mobile phone at hand. Thanks to high standards of life and education and a good telecommunication infrastructure, internet access in those countries has reached almost full saturation amongst nationals, while in other less developed Arab countries, internet access may still be a luxury to those who struggle to feed their families or to those who still cannot read and write.

It is natural that in countries like Qatar and the UAE there would be a decline in newspaper readership. Firstly because of the general global trend, and secondly because most local newspapers in GCC countries have not evolved much and continue to be rather traditional in form and content, focusing on governments and royal families.

Television remains strong in the Middle East in comparison with the West. But millennials (18-24 years old) watch TV online, now known as "video on demand." They like to decide when to watch what and on which platform. They do not like to be tied to a schedule or a channel. They also consume content differently as they jump from platform to platform, watching longer content on YouTube, for example, than on Facebook or Twitter.

When social media were first introduced, they were tools of communication between people. Arab revolutions may have been a catalyst for changing the nature of social media from social to political.

Now social media have turned into a place for very high consumption of video, articles, audio, photos (you name it), whether by individuals, politicians, or institutions. Some individual online content creators have gained more influence than entire television channels.

Media organizations have had to cope with this trend by creating online news and entertainment material exclusively for social media, like AJ+. It is shorter, less formal, more personal than TV content, and very audience-centric.

Television channels now duplicate their content online, tailoring it to the behavioral patterns of mobile phone consumers. Long news shows can be cut into bits and pieces, posted on Twitter, Facebook, Instagram, and YouTube.

The incredible rise of Snapchat and Instagram has been higher in Gulf countries than anywhere else because these are exclusively mobile phone applications that provide users with a level of privacy that is very appealing to GCC nationals who fear repression from their social environment. Nobody can see who is following you or whom you are following on Snapchat. Snapchat and Instagram stories disappear after 24 hours, so it feels like no traces are left behind.

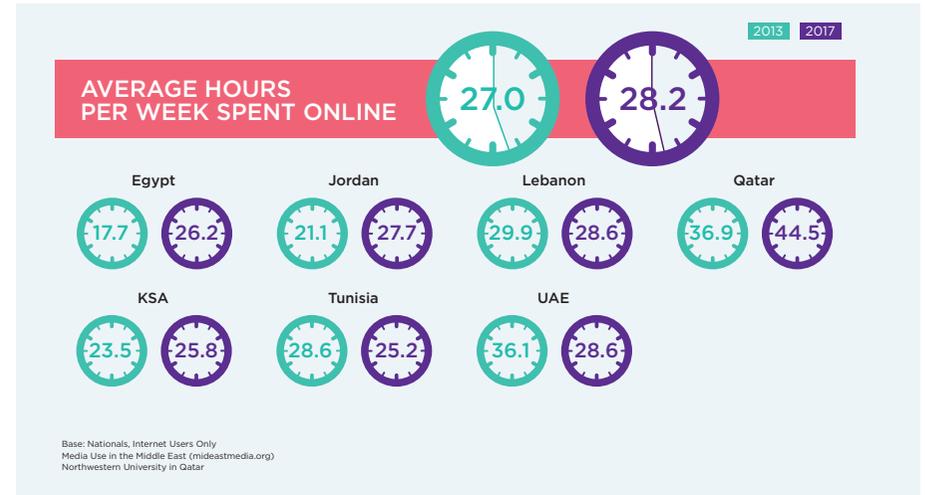
This is not to say that other non-GCC countries do not fear repression. But social repression in GCC countries is much higher, especially for women and for male-female interactions. Additionally, GCC youth are experiencing a boom in self-expression, unparalleled elsewhere, where it may have already happened earlier or differently.

Comedy has been quite successful for online creators, probably because many things still cannot be tolerated in any other form due to censorship and punishment of free speech.

The increase of Arabic as a language used on the internet goes hand in hand with the increase of Arabic-language content being produced online and with Arabic-friendly applications. It is no longer the Arab elite, speaking foreign languages, that is online. In some countries, it is almost—literally—everyone!



INTERNET USE



On average, internet users spend more than 28 hours a week online.

Nationals in the seven Arab countries surveyed spend 28.2 hours a week online on average, up slightly from 27 hours a week in 2013. Internet users in the UAE spend notably less time online than they did in 2013, while those in Egypt, Jordan, and Qatar spend considerably more time online. Qataris spend far more time online than their regional peers—nationals in Qatar average 44.5 hours per week online.



Direct messaging (texting) and social media are a part of life for a vast majority of internet users.

In 2017, nearly all Arab nationals who use the internet texted online and used social media. These were among the most common online activities, with more than 9 in 10 internet users engaging in one or the other or both. By contrast, in 2013, checking email was the most common internet activity—86% said they used the internet to check email; in 2017, just 67% did. This shift from email to direct messaging dovetails with the shift from computers to smartphones for internet use.

Messaging/texting and social media are habitual among Arab nationals who use the internet, but these platforms are used more to receive information than to provide it. Eighty-three percent say they use direct messaging at least once a day to get messages and 62% say they use it daily to send messages. Similarly, 74% use social media every day to get messages and 63% use it to post messages or comments daily.

Internet users are also more likely to make or receive calls online and download or watch videos than they were in 2013. Among nationals who use the internet, 62% say they make or receive online calls every day—up from 41% in 2013. And daily use of the internet to download or watch videos has nearly doubled since 2013, from 26% to 50%.

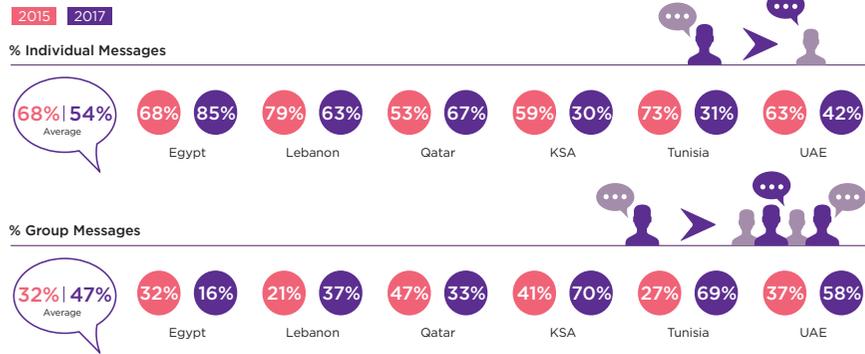
Since 2015, there has been a marked shift in how people use direct messaging. Arab nationals now use direct messaging to communicate with multiple people simultaneously nearly as much as for one-to-one communication. To assess this, respondents were asked what percent of the instant/direct messages they send and receive are with an individual versus a group. In 2015, 68% of direct messages were with one other individual, and 32% were with multiple people. In 2017, nationals said an average 54% of messages are one-to-one missives and 47% are with groups. Egypt and Qatar are the only two countries reporting an increase in one-to-one messaging.

2013 2017

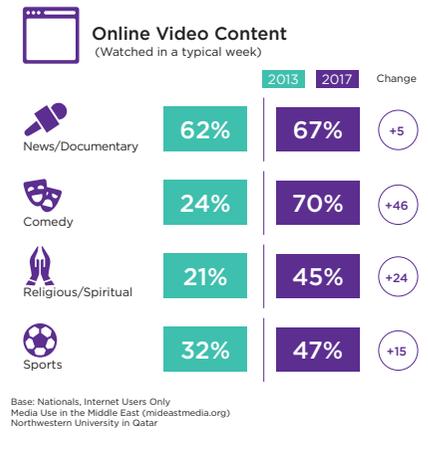
% WHO DO THE FOLLOWING ONLINE AT LEAST ONCE A DAY		24h	
			Get messages on direct/instant messaging services 83%
Make or receive calls	41%	62%	See what friends and family are doing 76%
Download or watch videos	26%	50%	Get messages on social media 74%
Look for news	46%	47%	Post messages or comments on social media 63%
Download or listen to music	41%	39%	Post messages or comments via instant/direct messaging 62%
Play games	30%	33%	Post or share your own multimedia content (videos, photos, etc.) you created 56%
Check email	49%	31%	Re-post or share links or content (videos, photos, writing, etc.) created by others 54%
Look for health information	23%	24%	Look for information about religion 25%

Base: Nationals, Internet Users Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Messaging With Individuals Vs. Groups

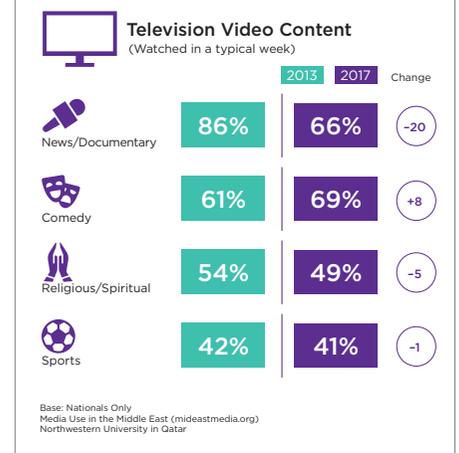


Base: Nationals, Direct Messaging Users Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

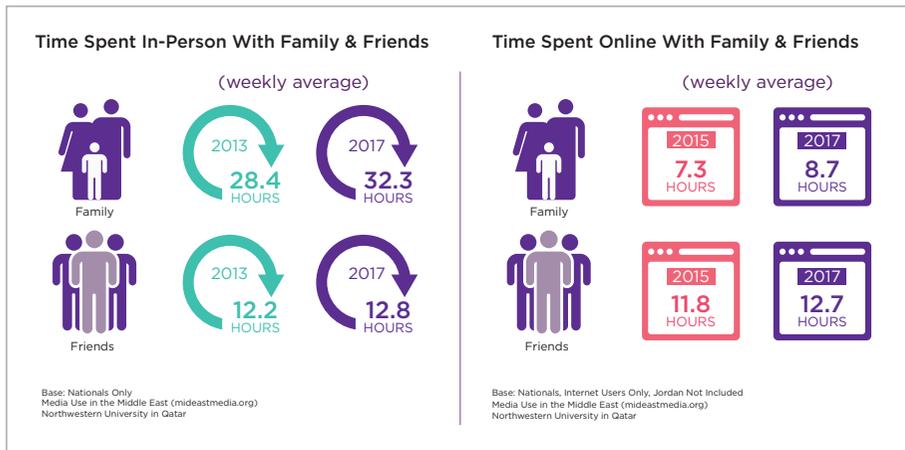


The internet is increasingly used to access entertainment content.

In 2013, internet users primarily went online for news. Since then, there has been a 46 point jump in the share of national internet users who watch comedy online—from 24% to 70%. Comedy has surpassed news as the primary online video content viewed. Sports and religious content have also made gains in internet viewership since 2013.



As people watch more video content online, they are tuning in less to TV. In 2013, 86% of Arab nationals in the seven countries surveyed said they watch news on TV; in 2017, only 66% said they do. Comedy is the only TV genre nationals report watching more of, increasing from 61% in 2013 to 69% in 2017. Overall, roughly the same share of nationals now watch content online as watch on TV.



Despite rising internet connectivity and more time being spent online in several countries, Arab nationals are carving out more in-person time with family.

On average, nationals spend roughly 32 hours a week with family—an increase of nearly four hours per week since 2013. Face-to-face time with friends is roughly unchanged at 12.8 hours a week—less than half the time spent with family on average.

Internet users are more likely to socialize with friends than with family online. Arab nationals who use the internet report spending roughly 13 hours each week online with friends, and about 9 hours online with family. The expansion of messaging apps, social platforms and other media have created more ways for people to connect with and engage others online.

TRACKING THE INTERNET OVER TIME

Expert Commentary: Jeffrey Cole

In our World Internet Project (WIP), we have been tracking digital trends for 18 years and now conduct our work in 35 countries. When we started the WIP in 2000, we quickly learned that more than from any other place, online time came from time that would have otherwise been spent watching television. This is not surprising. When the internet started, users could only access it via dial-up modem, and the average dial-up user was online 2-4 times a day for 20-40 minutes at a time. Users viewed dial-up as a “big deal” and frequently made lists of the things they wanted to do when they logged on. If they logged off and forgot something, it was perceived to be a hassle to go back online.

Where they could, dial-up users typically set up their computers in a separate office or space in the home. So time spent online was generally time spent not interacting with the family nor time spent watching television. In the dial-up era, users, particularly those under 18, watched less television.

Broadband changed everything, particularly the way we watch television and video content. Broadband users went online 30-40 times a day for 2-3 minutes at a time. We didn't make lists because we could go online directly as soon as we remembered something that needed to be done. Since we were online so many times a day, we moved the computer closer to where we were: in the kitchen and the den. Broadband became television's best friend.

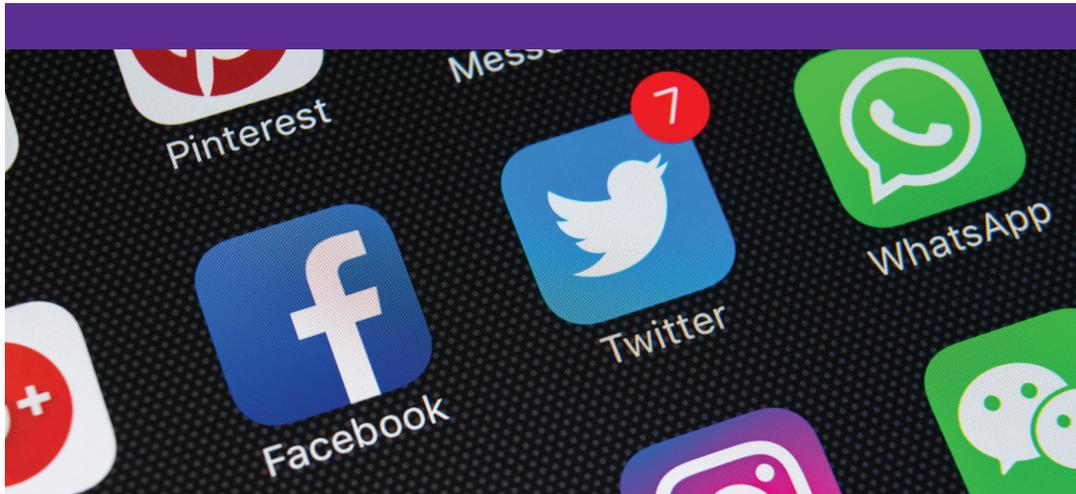
With direct connection and higher speeds, people could watch television programming on the internet. Initially, this meant short clips and then YouTube. Eventually, the habit of watching online began to eat away at broadcast and cable television's ratings and led directly to Netflix and Amazon Prime.

In the 18 years since the advent of the internet, the entire way millennials and Gen-Z (as well as some Gen-X and Boomers) watch video has completely transformed. We need a new word for television because most of the video content people under 40 watch is not on a television. Our work shows that for those under the age of 30, only

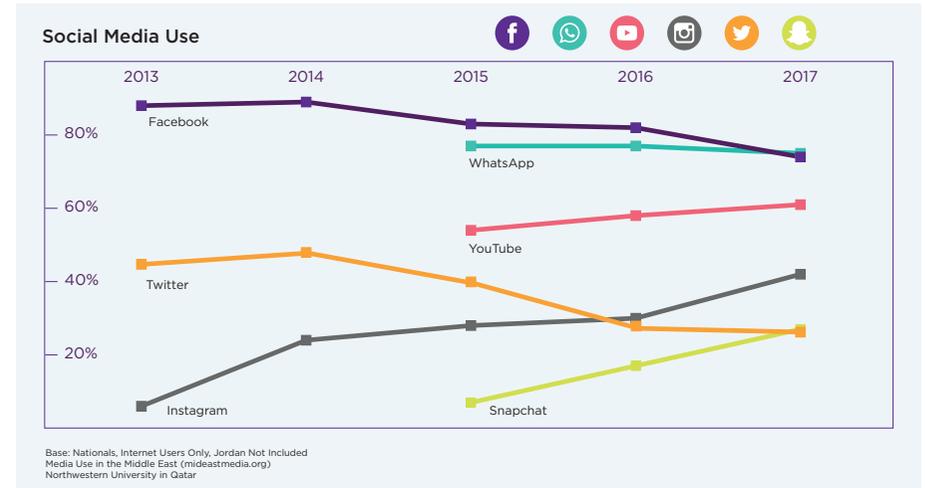
20% of their viewing is live (and not all of that is on television); the other 80% is recorded or streamed. Of the 20% that is live, almost all of it is sports. According to GroupM, the world's largest media buyer, younger viewers, for the first time, watched more of the recent Winter Olympics online than on television.

“Saturday Night Live” knows that 6-8 million people may watch Alec Baldwin impersonate Donald Trump on live or recorded television. Over a billion people watch in clips online. So much content is viewed online that the very future of broadcast networks and cable channels is at stake.

Before we started our project, it was clear that the way we communicate, buy, and work would be completely transformed by the internet. Changes in screens and how people watch television (not to mention going to the movies and listening to music) clearly show that entertainment has been completely transformed as well.



SOCIAL MEDIA



Social media use is changing as new platforms rise to prominence.

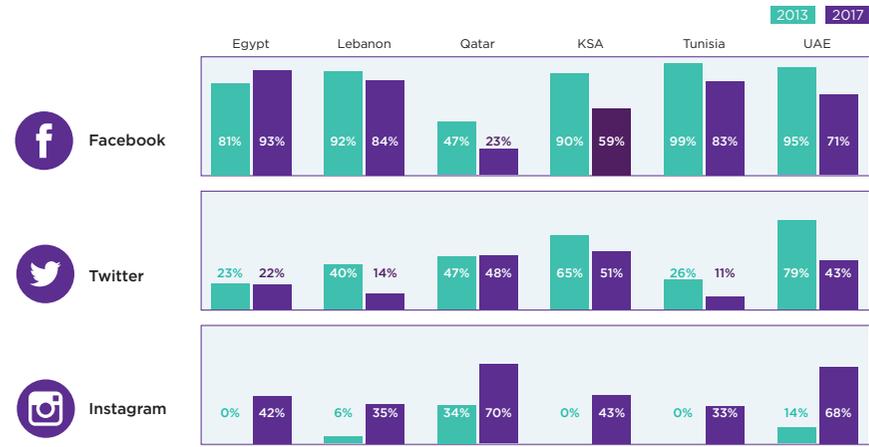
Social media in the Arab countries studied here have seen considerable volatility. In 2013, Facebook dominated the landscape with 88% penetration among internet users—that figure fell to 74% in 2017, with declines in all countries except Egypt. Qataris use Facebook at much lower rates than other nationals, and penetration there fell by half since 2013, dropping to just 23%. For Facebook, falling use of their flagship platform may be offset by increased use of Facebook-owned WhatsApp and Instagram.

WhatsApp was used by 77% of internet users in 2015, and stayed steady at 75% penetration in 2017. WhatsApp use is weakest in Tunisia, where its already low penetration fell even further—from 17% in 2015 to 10% in 2017.

Instagram and Snapchat have gained popularity in all countries. Instagram had an overall sevenfold increase in penetration since 2013, with the strongest penetration in the Gulf countries. Snapchat penetration has increased fourfold since we first measured it in 2015. YouTube's popularity also increased in most countries from 2015 to 2017, except Qatar and the UAE.

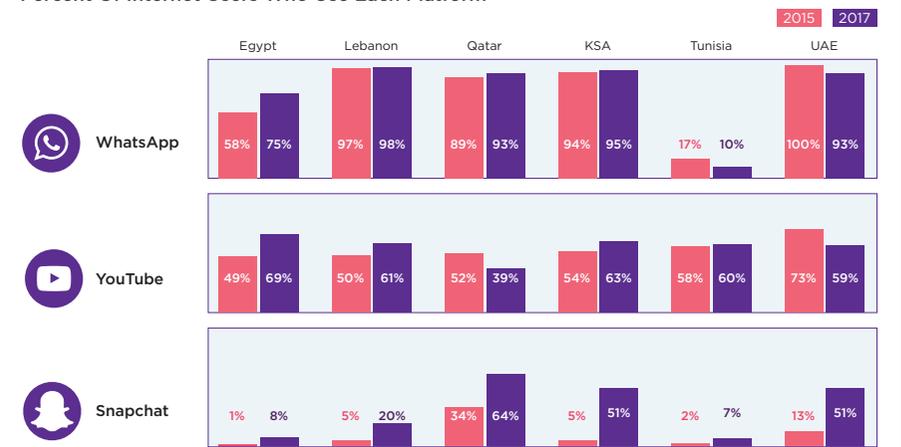
The appeal of Twitter in Arab countries, however, has plummeted between 2013 and 2017, from 45% penetration to 27% among nationals who use the internet.

Percent Of Internet Users Who Use Each Platform



Base: Nationals Only, Internet Users Only, Jordan Not Included
 Media Use in the Middle East (mideastmedia.org)
 Northwestern University in Qatar

Percent Of Internet Users Who Use Each Platform



Base: Nationals Only, Internet Users Only, Jordan Not Included
 Media Use in the Middle East (mideastmedia.org)
 Northwestern University in Qatar

WATCHING SOCIAL MEDIA SHIFTS

Expert: Commentary: Banu Akdenizli

The Arab Spring of 2011 was a turning point in the history of social media, not only for the region but also for the rest of the world. Social media was seen primarily as a vehicle for self-expression, identity construction, connection, and storytelling to an audience unrestricted by geography. But when protesters in Egypt used Twitter to spread messages about government crackdowns, documenting arrests for the rest of the world to see, social media transformed into the preferred medium for free-speech activities.

Since NU-Q began this survey in 2013, data have consistently shown the rise in the use of social media across the Middle East among an increasingly connected and engaged public. But that rise in social media use has been accompanied by volatility in social media use, as well.

The once ubiquitous Facebook is king no more. In 2013, 88% of internet users were on the platform, but by 2017 the number dropped to 74% among nationals. The numbers are particularly low in Qatar and Saudi Arabia, where penetration has dropped to 23% in Qatar and 59% in Saudi Arabia. In 2017, three in five (61%) internet users use YouTube. By contrast, a report by the Pew Research Center shows Facebook (68%) and YouTube (73%) dominating the social media landscape in the United States¹.

WhatsApp has emerged as the new contender, leading the direct messaging revolution in the region. Another important trend we see is the increasing use of social media (73% of respondents) and direct messaging (74%) for news and information. A similar finding by Pew shows 67% of Americans getting at least some news on social media². Trusting news from social media, however, is less certain—both Pew and NU-Q data show users are wary of information they get online.

No doubt fear over fake news, extremism, and hate speech explain this trend. In a recent example, the hack of the Qatar News Agency (QNA) and fabricated quotations attributed to His Highness Sheikh Tamim bin Hamad Al Thani, Emir of the State of Qatar were published on Qatari news sites and social media in May 2017 and then used as a pretext for the blockade.

Young people under 30 are the majority demographic group in many countries in the Middle East, and they stand out for embracing a variety of social media platforms and using them frequently. More than other platforms, Instagram, Snapchat, and Twitter use skew toward younger nationals. As the surveys show, younger social media users post, share, and comment more on a daily basis.

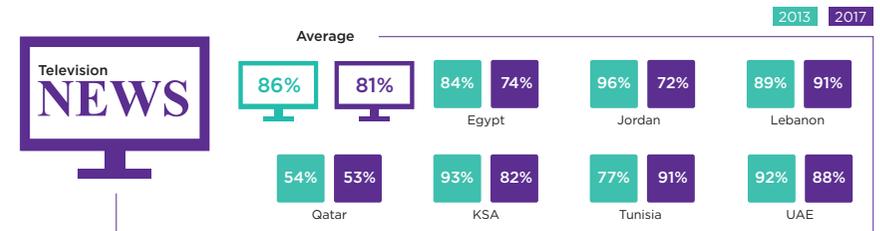
In 2017, Gulf residents were quick to take to social media during the Gulf diplomatic crisis, be it to express nationalism, or to use humor and satire to deal with the political crises and to alleviate anxiety. Information and communication technologies are ever evolving, as are social media and their applications by both creators and users. And with a young and ever-dynamic population, how it will further evolve in the region remains to be seen.

1. <http://www.pewinternet.org/2018/03/01/social-media-use-in-2018/> 2. <http://www.pewresearch.org/fact-tank/2017/10/04/key-trends-in-social-and-digital-news-media/>



NEWS CONSUMPTION

Importance Of Television For News & Information

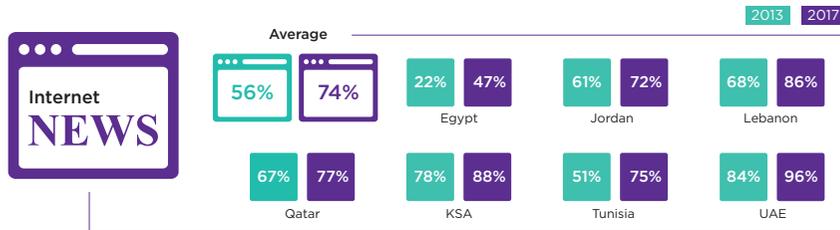


Base: Nationals Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Television remains a dominant source of news, but the internet may be eroding TV's importance.

In 2017, 81% of Arab nationals surveyed said television is an important source of news and information, making it the leading medium in the region for news. Yet that figure also reflects a decrease from 2013, when 86% of nationals said TV was an important source of news. These decreases were sharpest in Jordan, where the share of citizens who said TV is important for news fell from 96% to 72%; Saudi Arabia, where it fell from 93% to 82%; and Egypt, where it fell from 84% to 74%. Only Tunisia showed a sizable increase in the importance of TV news, jumping from 77% to 91%. In Qatar, only slightly more than half of nationals cited TV as important for news and information in 2013, and that figure has stayed low and unchanged.

Importance Of Internet For News & Information



Base: Nationals Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Importance Of Newspaper For News & Information



Base: Nationals Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Meanwhile, 74% of Arab nationals say the internet is an important source of news—up from just 56% in 2013. This uptick occurred across every country in the region.

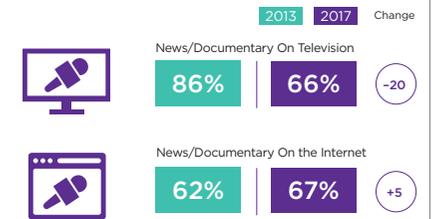
In the Gulf countries surveyed, the internet has now surpassed television as an important source of news, thanks in part to social media platforms like Twitter and Facebook, and messaging apps. And roughly two-thirds of all Arab nationals surveyed listed social media and messaging apps as important sources of news in 2017 (these platforms were not measured in 2013).

Traditional newspapers are also declining in importance as a news source—perhaps not surprising given the sharp decline in newspaper readership. In 2017, just 34% of Arab nationals listed newspapers as an important source of news, down from 46% in 2013.

News apps are likely helping legacy news organizations keep a foothold in the market. In 2017, 45% of nationals said mobile or web news apps are an important source of news (use of news apps was not measured in 2013).

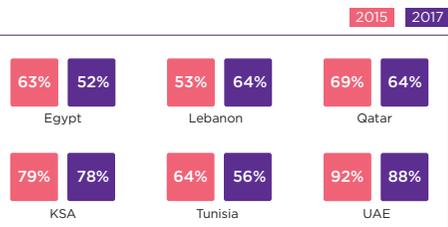
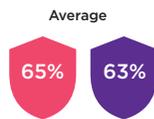
Overall, nationals are less likely to watch TV for news than they were in 2013— and they're more likely to get their news online. Overall, 66% of nationals say they watch news or documentaries on TV in a typical week, down from 86% who did so in 2013. Lebanese nationals watch the most news and documentaries on TV— 78% said they do so in a typical week in 2017, while far fewer nationals say the same in other parts of the region. Overall, 67% watch news online in a typical week, vs. 62% in 2013.

Viewing News Content On TV Vs. Online



TV Base: Nationals Only
Internet Base: Nationals, Internet Users Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Trust & Confidence In Mass Media



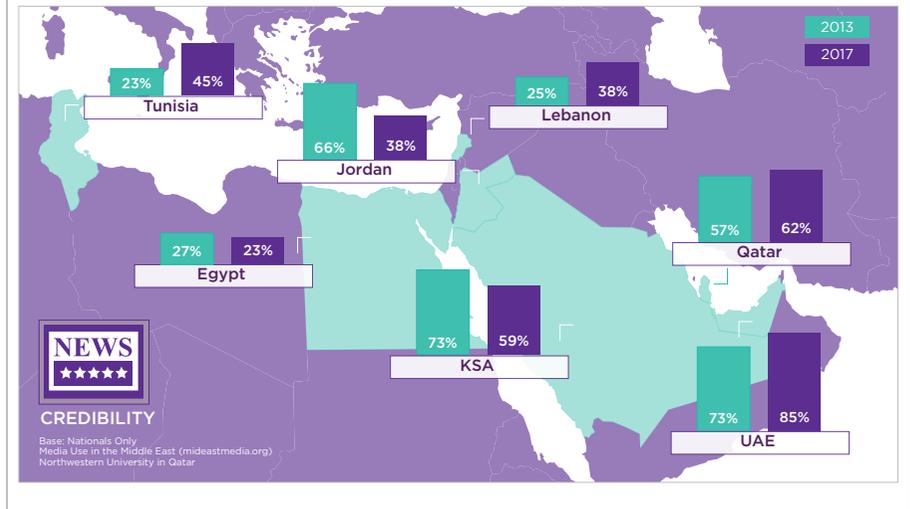
Base: Nationals Only. Jordan Not Included
 Media Use in the Middle East (mideastmedia.org)
 Northwestern University in Qatar

Beliefs in the credibility of news media are in flux across the region.

Most nationals in the region—about two thirds—say they have trust and confidence in mass media to report the news fully, fairly, and accurately. This is a Gallup survey question that has been asked in the United States and elsewhere since the 1970s. Yet this trust and confidence is waning in many countries. In Egypt, trust in mass media dropped to 52% in 2017 from 63% in 2015; in Tunisia, it dropped 8 points to 56%. Lebanon is the only country where trust and confidence in news media increased, from 53% in 2015 to 64% in 2017.

Similarly, there are marked differences in how Arab nationals perceive the credibility and independence of news organizations in their countries. In Jordan, the credibility of news organizations has plummeted—in 2013, 66% said news media in their country are credible; in 2017, just 38% did. Saudis have also taken a dimmer view of news outlets—while 59% still view news media in their country as credible, this is a sharp drop from 2013, when 73% appraised news media as credible. By contrast, news media in Lebanon, Tunisia, Qatar, and the UAE have gained credibility since 2013 among nationals in those countries.

News Credibility



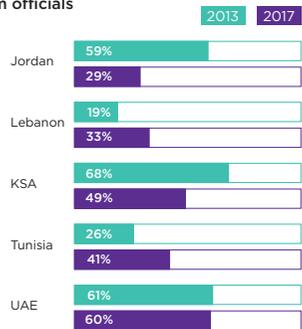
Base: Nationals Only
 Media Use in the Middle East (mideastmedia.org)
 Northwestern University in Qatar

Independent Reporting

The media in this country can report the news independently without interference from officials



Change



Base: Nationals Only, Egypt and Qatar Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

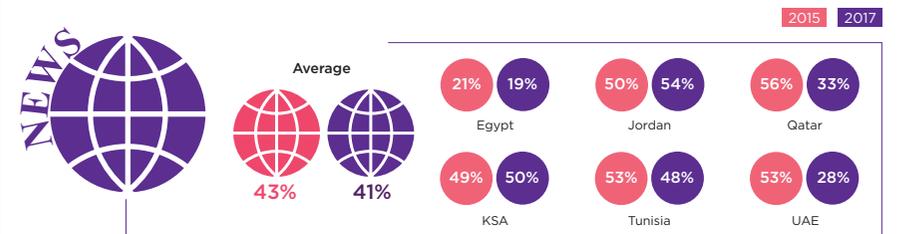
Consistent with a decline in perceived media credibility, fewer Jordanians and Saudis say news media in their countries are independent—that is, the ability of news media to report the news without interference from officials. In contrast, Lebanese and Tunisians are more likely to say news media in their countries are independent than they were in 2013.

Trust in foreign news organizations may be waning.

In both 2013 and 2017, fewer than half of nationals believed that people benefit from consuming news from foreign news organizations—and in Qatar and the UAE, where confidence in the benefits of foreign news was strong, less than one-third expressed confidence in it 2017. Just 33% of Qataris say people benefit from consuming foreign news, down from 56% in 2013. In the UAE, agreement fell from 53% to 28%.

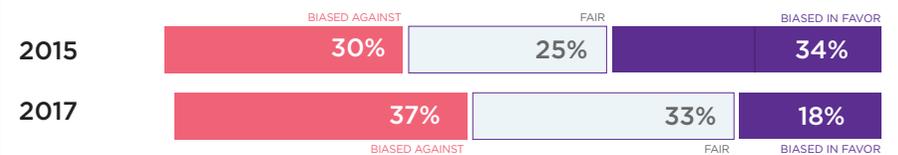
Additionally, nationals are more likely to say international news organizations' coverage is biased against the Arab world. In 2017, 37% believed coverage of the Arab world was biased, compared with 30% in 2013.

People benefit from consuming news from foreign news organizations



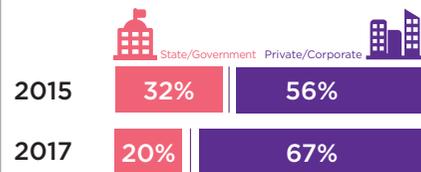
Base: Nationals Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

International news organizations' coverage of the Arab world



Base: Nationals Only, Egypt and Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Favorite News Organization Ownership (Self-Reported)



Base: Nationals Only, Egypt and Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

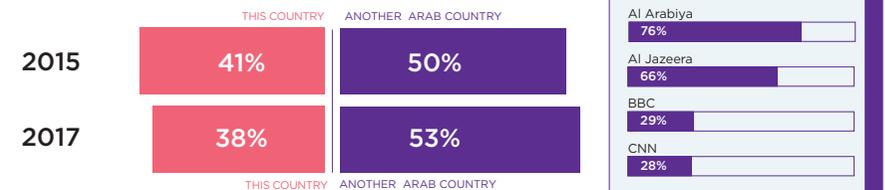
Nationals may be shifting from state-owned to privately-owned news organizations.

Arab nationals may be shifting away from state-owned news media toward private-run news media. Overall, only 20% say their favorite news organization is state- or government-owned, down from 32% in 2015. Conversely, 67% say their favorite news outlet is privately owned, up from 56% in 2015.

Most nationals say their favorite news organization is based in their own country. Saudi Arabia is the only country where nationals prefer a news organization from elsewhere. And although 76% of Saudis say they watched Saudi Arabia-based Al Arabiya (in the past week), 66% watched Qatar-based Al Jazeera, making Saudis the most likely to watch that network. Al Jazeera is also popular in Qatar and the UAE, where 45% and 50% say they watched in the past week, respectively.

As consuming news online has increased in the countries surveyed, a willingness to pay for news content has fallen. Just 31% of Arab nationals say they are willing to pay for any mode of news, down from 44% in 2015. Nationals in Saudi Arabia and the UAE are most likely to pay for news content—61% and 57%, respectively. In Qatar, 71% of nationals were willing to pay for news in 2015; in 2017, fewer than 25% were willing to do so.

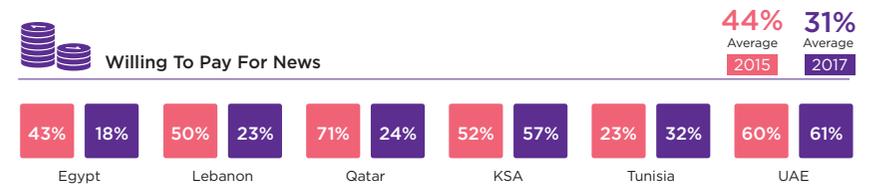
Location of Favorite News Organization: Saudi Arabia (Self-Reported)



Base: Saudi Nationals
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar



Willing To Pay For News



Base: Nationals Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

ASSESSING HOW NEWS IS CONSUMED

Expert Commentary: Justin D. Martin

The channels through which Arab nationals get news have shown both resilience and marked change since 2013. A full 8 in 10 Arab nationals said television was an important medium for their news and information needs in 2017, a seemingly high figure given concurrently high levels of digital connectivity in these countries. By comparison, 50% of U.S. respondents in 2017 said they got news on TV often (Gottfried & Shearer, 2017¹). In four of Arab countries surveyed (Saudi Arabia, UAE, Qatar, and Lebanon) more nationals use the internet than U.S. residents, so the durability of TV in Arab countries cannot be attributed to weaker digital connectivity.

Newspapers in Arab countries have not been so resilient. The share of nationals who say newspapers are important for their news and information needs has fallen significantly in every country except Tunisia. In some countries, the figures have dropped so far as to question whether newspapers are a part of public life at all. Just one in seven Jordanians say newspapers are important sources of information, and one in six Egyptians say the same.

This does not mean, however, that Arab nationals are uninterested in news. Governments in the countries studied here own many of the available newspapers, which are often long on government press releases and short on revelatory reportage. Arab respondents are still voracious consumers of news; they just don't get it from broadsheets. Nearly two-thirds of Arab nationals in all countries say they get news on a smartphone at least once a day. This figure, 62%, is not that much less than the number of Americans who own smartphones—77%, a figure that is lower than that in five of the Arab countries surveyed here (Pew, 2017²).

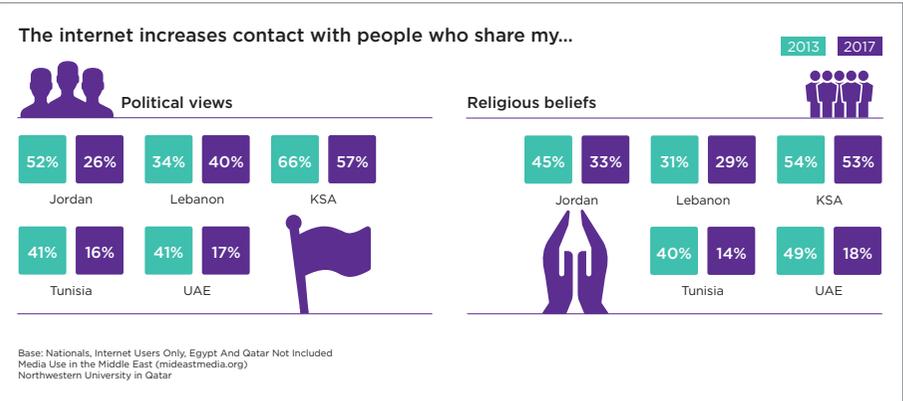
Fewer Arab nationals said their favorite news organization is government-owned in 2017 compared with 2015, and 67% now say their favorite news outlet is a private entity. It is likely that this shift to non-governmental news organizations is at least partly fueled by the abundant choices internet connectivity affords. Still, many respondents report watching government-funded news organizations, though they

are often not owned by one's own government. Two in three Saudis, for example, say they watch Al-Jazeera, owned by Qatar, and nearly half (45%) of Qataris say they watch Saudi-funded Al-Arabiya. Certain trends in news use in Arab countries, then, show resilience over time, as well as resilience across some national boundaries.

1. Gottfried, J. & Shearer, E. (2017, September 7). *Americans' online news use is closing in on TV news use*. Pew Research Center. Retrieved from: <http://www.pewresearch.org/fact-tank/2017/09/07/americans-online-news-use-vs-tv-news-use/> 2. Pew Research Center. (2017). *Mobile Fact Sheet*. Retrieved from: <http://www.pewinternet.org/fact-sheet/mobile>

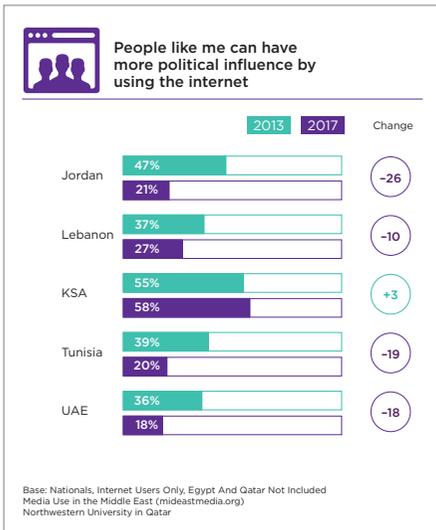


POLITICAL EXPRESSION ON THE INTERNET



Increased internet use has not eliminated exposure to differing views.

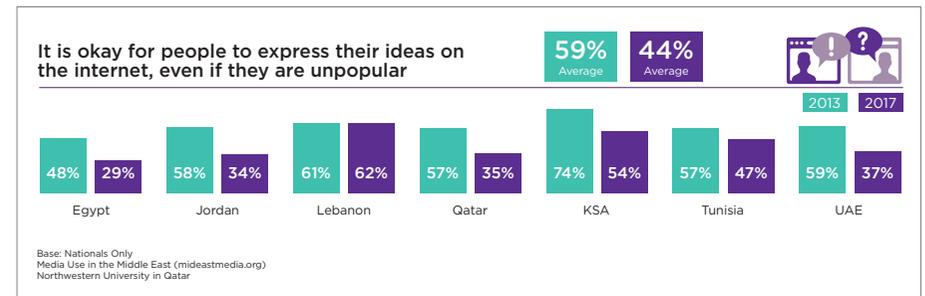
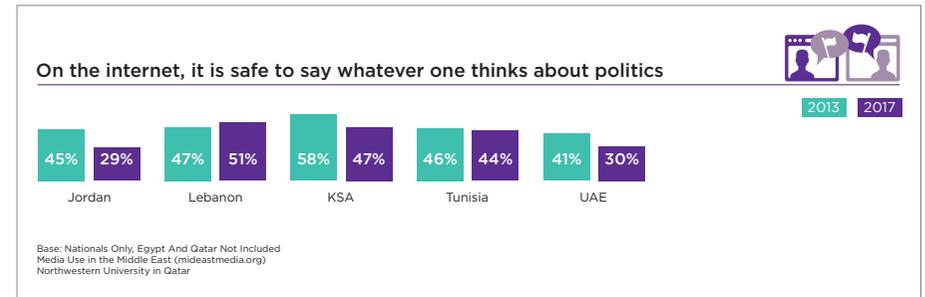
While the internet is often thought to reinforce one's existing beliefs, for many Arab nationals the internet is not an echo chamber. In almost every country surveyed, national internet users were less likely than they were in 2013 to say the internet increases their contact with people with similar political or religious beliefs.



Fewer nationals say the internet is useful for wielding political influence—and privacy concerns may be stunting online political activism.

In 2013, a sizeable minority of internet users in the countries studied here said the internet is a tool for political influence. Now, only half as many express the same view. This is particularly pronounced in Jordan, Tunisia, and the UAE, where only one-fifth feel they can have more political influence by using the internet. Saudi Arabia is the outlier, as most citizens continue to say the internet is useful for political change.

Furthermore, fewer Arab nationals feel safe expressing political views online. In Jordan, for example, 45% of nationals in 2013 agreed it's safe to share political views online; in 2017, just 29% said the same. And in almost every country, nationals are less likely to say it's okay for people to express ideas on the internet, even if they are unpopular.



CONNECTING SOCIAL MEDIA CONTINUITY AND IMPACT

Expert Commentary: Khaled Al Hroub

Views differed over the extent and significance of the role of the media during the popular uprisings of the Arab Spring in 2010–2011, yet there was almost unanimous agreement that the Arab Spring had witnessed the “finest hour” of the Arab media, particularly in the astonishing rise and use of social media. During those uprisings, freedoms of the media, along with the use of internet platforms to express political views and mobilization, peaked to unprecedented heights. In the years that followed, however, media freedoms regressed in tandem with the failure of most of these uprisings to radically change the status quo, and the resilience of the “deep state” in most Arab countries.

Such regression could not, however, entirely push back the new emerging mediascape to the pre-Arab Spring times, specifically its uncontrollable social media. Some of the boundaries of the new mediascape that were demarcated by the online youth mass activism of the uprisings seemed to withstand the harsh measures that were imposed by nervous states later on. Thus, a mixed picture was created combining residual and upheld aspects of the Arab Spring social media next to traditional (and new) state countermeasures. The internal dynamics between these inharmonious elements produced a present media scene that could be dubbed as one of “contraction and expansion,” with no consistent general trend to capture.

This varied scene of waves of contractions and expansions is uniquely and broadly detailed by the empirical surveys offered in the series of reports at hand, particularly in the questions relating to political expression. Over the period of five years, 2013–2017, the Arab online users expanded their boundaries and became less insular. In the surveyed countries, internet users interested in political or religious issues showed a tendency to come out of their like-minded internet “bubbles” and explore other political or religious views, groups, and domains. This could be partly interpreted as a departure from one’s own country-focus, or one’s own group-focus that characterized many online users during the Arab Spring. With the stagnation that marked a number of uprising outcomes, and the continuation of regional turmoil, more concerns in trans-national developments have been developed and were reflected in how online users shifted their interest.

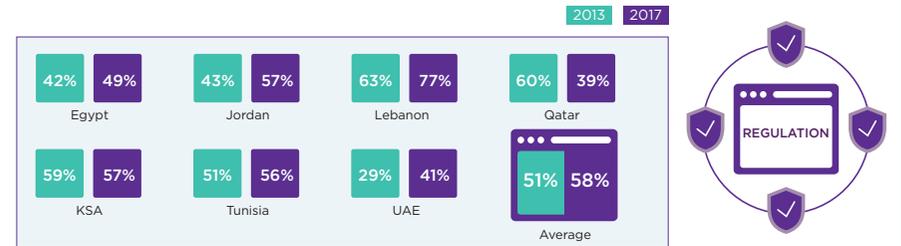
In contrast to such ‘expansion,’ there were clear contractions in a number of areas; for instance, in relation to the belief of the internet as a tool for “wielding political influence.” In 2017, the belief in the power of the internet as an instrument to effect political influence decreased substantially from what it was in 2013. Another clear contraction is seen regarding whether or not “it is safe to say whatever one thinks about politics,” and whether or not “it is okay for people to express their ideas on the internet, even if they are unpopular.” These contractions are in fact expected in light of the rise of state surveillance in the region over online activities and the introduction of cybercrime laws, in particular in Egypt, the Gulf countries, and also Jordan. The Gulf crisis that erupted in June 2017 with Saudi Arabia, the UAE, Bahrain, and Egypt on one side and Qatar on the other, has also intensified state involvement in and vigilance of online activities.

Despite the clear increase of state involvement and control over the media in post-Arab Spring years, it could be said that certain areas of penetration into the mediascape remained difficult for governments to suppress, as the five-year reports have shown, allowing further cycles of contractions and expansions to appear and reappear in the coming years.



ONLINE REGULATION AND PRIVACY

Percent Of Nationals Who Want More Internet Regulation In Their Country



Base: Nationals Only
 Media Use in the Middle East (mideastmedia.org)
 Northwestern University in Qatar

Desire for tighter internet regulation is increasing, though not primarily due to a desire to censor speech, but rather to secure privacy protections and make internet access affordable.

Most Arab nationals (58%) want greater internet regulation in their country, up from 51% in 2013. Three-fourths of Lebanese want more internet regulation. Internet regulation is less of a concern among Qataris, 39% of whom want more regulation, down from 60% in 2013.

The internet in this country should be more tightly regulated than it is now for: 2017



Base: Nationals Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

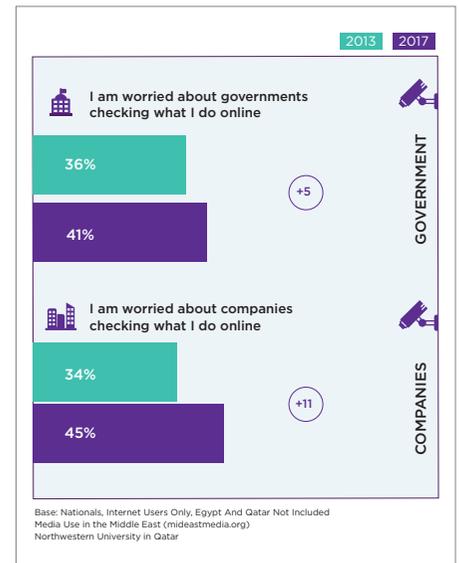
Protecting user privacy is the leading reason Arab nationals cite for wanting more internet regulation (56%); making sure people can afford the internet (52%) and monitoring culturally sensitive content (51%) are the second and third contributory concerns. In Lebanon, internet cost is the number one reason nationals say they want more regulation—78% say they want regulation to make the internet affordable.

Online privacy is a growing concern.

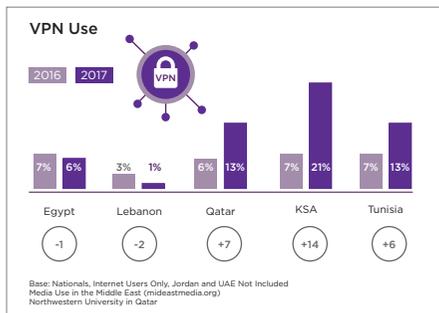
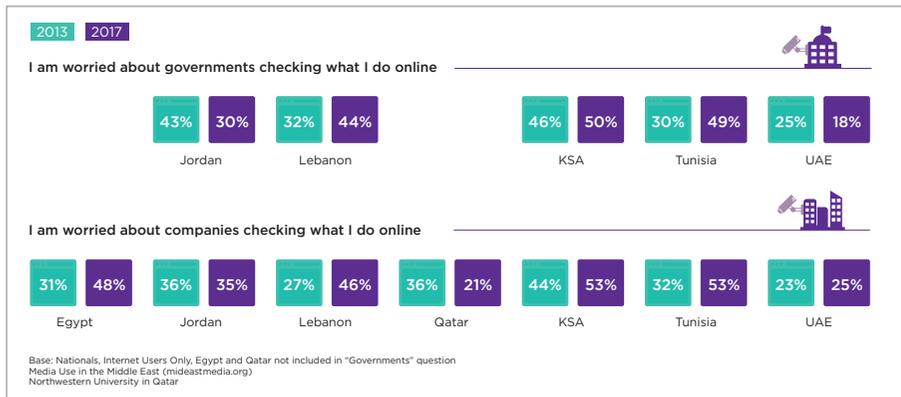
More nationals in 2017 said they are worried about online surveillance by governments and corporations than said the same in 2013. In 2017, 45% of Arab nationals who use the internet said they're worried about companies checking what they do online, up from 34% in 2013. And 41% said they're worried about government checking what they do online, up from 36% in 2013.

There are noteworthy differences among several countries, however. While Lebanese, Saudi, and Tunisian internet users are more concerned about government tracking than they were in 2013, those in Jordan and the UAE are less concerned. Internet-using Tunisians, Saudis, and Egyptians are among the most concerned about companies tracking their online behaviors. Saudi and Tunisian internet users are also the most likely to use a VPN or other similar service, as are Qataris. Since 2016, the share of VPN users in Qatar and Tunisia doubled; in Saudi Arabia, it tripled.

One-fourth of nationals who use the internet say concerns about privacy have changed the way they use social media. Of those, the most-cited behavioral modifications are changing privacy settings, posting/sending less often, posting/sending less sensitive information and fewer opinions, and connecting with fewer people on social media.



Base: Nationals, Internet Users Only, Egypt And Qatar Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar



MONITORING ONLINE PRIVACY AND SECURITY

Expert Commentary: Amy Kristin Sanders

Concerns about privacy and security online in the Middle East often mirror those shared by internet users worldwide. Globally, data seem to suggest a general increase in concern about both government surveillance and third-party surveillance. In addition, internet users seem to be growing more sophisticated, with an increasing number taking action to combat surveillance.

Compared to 2013 data, more internet users in 2017 are worried about how governments are monitoring their online activity, with 49% of Tunisians and 44% of Lebanese expressing concerns about surveillance. By comparison, 2016 Pew data indicate 52% of Americans were concerned about government surveillance.¹

Heightened concern about government surveillance is likely due to increased awareness of government data-gathering programs brought to light by American government contractor Edward Snowden. The critically-acclaimed documentary "Citizen Four", released worldwide in early 2015, was quickly followed by Oliver Stone's feature film "Snowden" in 2016.

Not surprisingly, use of Virtual Private Networks (VPNs) has increased along with concerns about surveillance. More than half the countries surveyed in 2017 saw an increase in citizens using VPNs, with the percentage of Qataris who use a VPN nearly doubling since 2016. Still, VPN use remains relatively low throughout the Middle East, and it is illegal to use a VPN in several countries in the region.

Despite concerns about online privacy and surveillance, many internet users report no changes to their behavior on social media. Only one in three internet-using nationals say that concerns about privacy have changed the way they use social media, ranging from the broadest change in social media behavior among Jordanians and Emiratis to more limited impact among Lebanese (31% Jordan, 30% UAE vs. 15% Lebanon). In comparison, 55% of Americans report taking steps to avoid social surveillance, according to recent Pew data.²

More citizens than before are interested in seeing increasing government regulation of the internet as well. In all countries surveyed except Qatar, an increasing number of nationals reported that the internet should be more tightly regulated than it is now. The two greatest areas of concern among citizens were increasing regulation to protect privacy and ensuring affordable access to the internet.

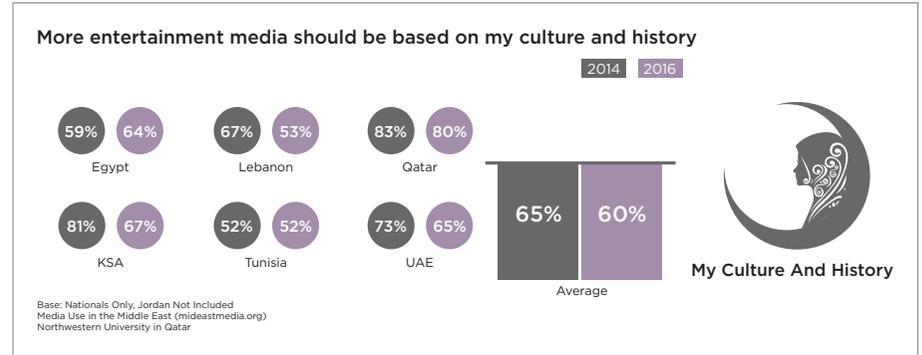
The 2017 survey revealed some support for content regulation, mirroring global trends. More than one-third of nationals in Qatar and nearly two-thirds of nationals in Lebanon support more regulation for culturally sensitive content. About half of the nationals surveyed in Saudi Arabia, Tunisia, and the UAE would support similar restrictions. In Europe, similar concerns have resulted in tougher laws targeting hate speech, fake news, and Holocaust denial in recent years.

In many ways, it is unsurprising that internet users' concerns about privacy and surveillance track similarly on a global scale given the nature of the technology and the increasing nature of threats to users. Worldwide, more training in digital security is necessary to ensure users have robust access to content in the safest ways possible.

1. <http://www.pewresearch.org/fact-tank/2016/09/21/the-state-of-privacy-in-america/> 2. <http://www.pewresearch.org/fact-tank/2016/09/21/the-state-of-privacy-in-america/>



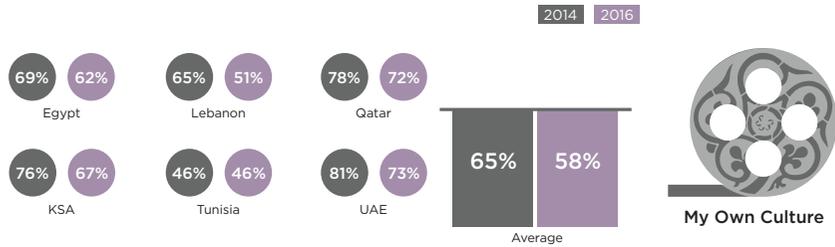
ENTERTAINMENT AND CULTURAL PRESERVATION



Entertainment preferences are related to cultural attitudes.

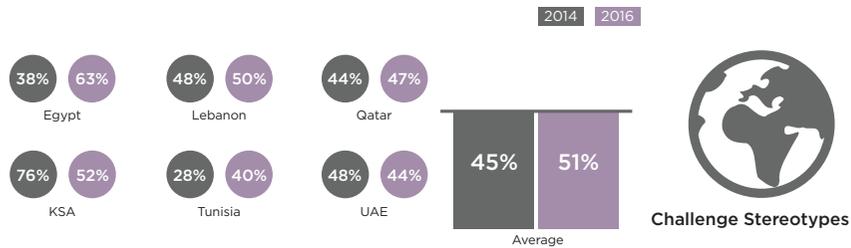
In 2014 and 2016, and forthcoming in 2018 and 2020, Media Use in the Middle East included a focus on entertainment use and cultural attitudes. The data show that Arab nationals increasingly turn to entertainment media to explore their own culture as well as other cultures. The majority say they'd like more entertainment based on their own culture and history. Qataris, nationals of the youngest country in the study—Qatar became a fully autonomous state in 1971—are the most likely to say they want more entertainment about their own culture and history, with a steady 8 in 10 expressing this view. Egypt is the only country where desire for culturally-relevant entertainment increased, edging up from 59% in 2014 to 64% in 2016.

I prefer to watch films that portray my own culture



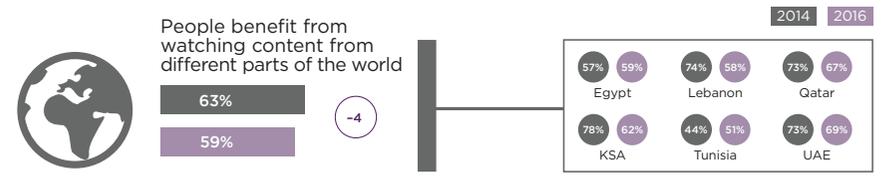
Base: Nationals Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

I believe entertainment media challenge rather than reinforce cultural stereotypes



Base: Nationals Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

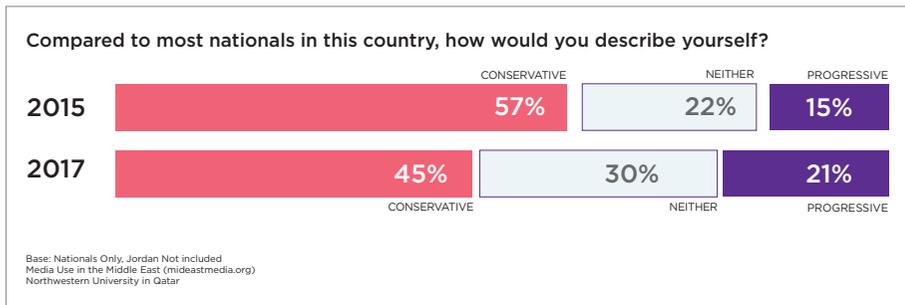
People benefit from watching content from different parts of the world



Base: Nationals Only, Jordan Not Included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Nationals in the Gulf countries—Qatar, Saudi Arabia, and the UAE—are most likely to seek films that portray their own cultures, while just 51% and 46% in Lebanon and Tunisia, respectively, say they prefer such films. Overall, 58% of Arab nationals in 2016 said they prefer to watch films that portray their own culture, down from 65% in 2014.

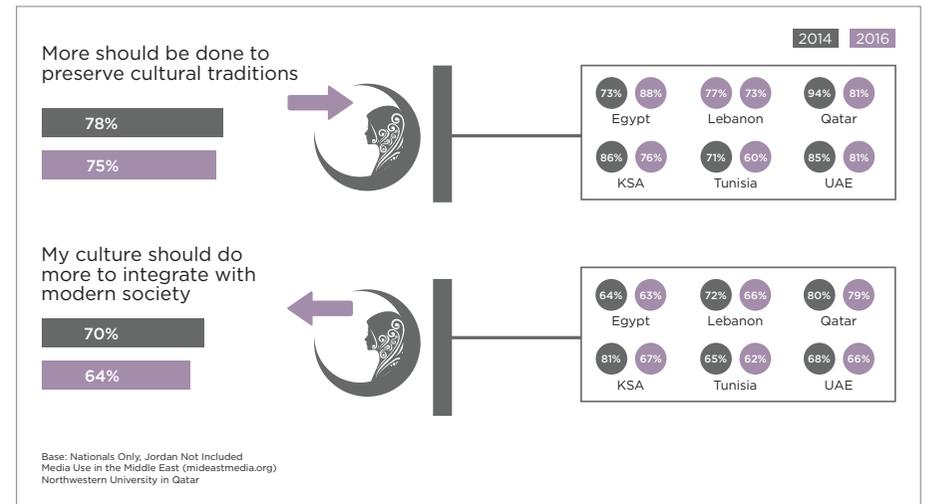
The majority of Middle Eastern nationals see value in watching entertainment media from across the globe—59% agree that people benefit from watching entertainment content from different parts of world, though this is down slightly from 2014, when 63% agreed. Nationals in Qatar and the UAE are most likely to agree with this sentiment.



The share of Arab nationals who identify as culturally conservative has fallen substantially since 2015.

Fewer nationals describe themselves as "culturally conservative"—just 45% in 2017 identified as such, down from 57% in 2015. These declines are most pronounced in Qatar, Egypt, and Saudi Arabia.

Seventy-five percent of nationals say more should be done to preserve cultural traditions—a sentiment most widely held in Egypt, Qatar, and the UAE. A majority also feels their culture should do more to integrate with modern society, though this sentiment is held by fewer nationals than it was in 2014, down by five points. Qataris are the most likely to say their culture should do more to integrate with modern society—roughly 80% agreed in 2016, consistent with 2014 results.



OBSERVING AND PRESERVING CULTURAL IDENTITY

Expert Commentary: Rami G. Khouri

Northwestern University in Qatar's fifth consecutive survey of how Arabs view and use media offers insights into people's deeper self-perceptions of their own identities and values, including cultural and national ones. The findings suggest several key observations in this respect.

First, the "Arab world" is fragmented into many subdivisions, as revealed by the wide range of views on many issues. Arabs have different perceptions and uses of media, and also differ on citizen's rights and the states' responsibilities in the public sphere. Public sentiments still broadly reflect government policies, despite the rich variety of news and views available to citizens in the digital realm.

Second, like most other people around the world, Arabs turn to media for news, entertainment, and political ideology or propaganda. Patterns vary as to preferring and trusting national or foreign news sources, but for the most part, Arab citizens still rely heavily on newspapers and television/radio and digital sources of news and entertainment from their own countries.

Additionally, how people in Arab countries view their media, their rights as citizens, and the state's role in this sector largely reflects each country's degree of cultural openness, freedom of expression, and pluralism. The large difference between most Lebanese who support a citizen's right to criticize government policies, and most Qataris and Emiratis who reject this view, mirrors the broader political cultures in those countries, i.e., liberal and free-wheeling in Lebanon, but more conservative and controlled in the Gulf states.

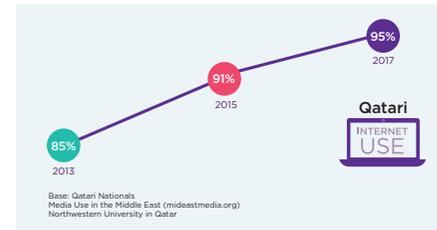
Finally, Arab citizens' views not only differ by region, but they also evolve over time. The steadily expanding use of digital media, especially smartphones, across the region exposes the majority of the population to cultural and political views from other cultures. This slowly expands Arab countries' acceptance of differing views and values, especially in the entertainment media, and maintains high rates of feeling that Arab cultures should integrate with the rest of the world.

Yet this exposure to foreign ways paradoxically strengthens the feeling that more should be done to preserve cultural traditions. Individual Arabs relate to the media they use according to at least three different criteria: their political/ideological views, their nationalism levels (e.g., whether or not their government serves their interests and needs), and their sense of individual or group identity (e.g., tribe, religion, ethnicity, Arabism).

Preserving one's cultural identity (including religious or ethnic identities) is one of the few arenas in which ordinary Arab citizens feel empowered and can act on their own, without having to be prodded or approved by state authorities. They can assert their cultural, tribal, and religious identities as a proxy for political or ideological self-assertions that are beyond their reach.

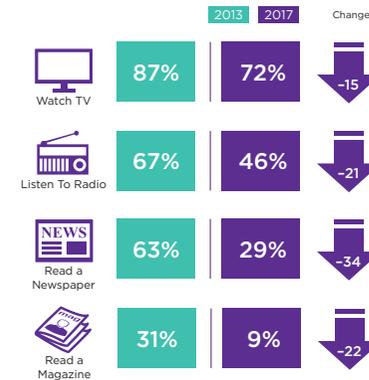


CHANGE IN QATAR



Qataris are the most digitally connected citizens in this study, and yet perhaps the most unique in their digital media use. Like Saudis and Emiratis, nearly 100% of Qataris use the internet, though Qataris spend nearly 60% more time online than all other nationals. At the same time, Qataris are less likely to report doing several popular online activities; fewer Qataris play video games than other nationals, and those who do play spend less time at it. Qatar has one of the world's lowest Facebook penetration rates among wealthy countries. Fewer Qataris listen to music than other nationals surveyed. Qataris are the only nationals to say they consume more news video online than entertainment video, and yet fewer Qataris are willing to pay for news than nationals in several other countries. Nearly all nationals in other Arab countries watch some television, but 3 in 10 Qataris say they never watch TV. Some of these patterns and others are explored in this section, highlighting that Qataris have embraced digital media, but in ways that do not conform to several regional, and global, patterns.

Qataris Who Use The Following Media

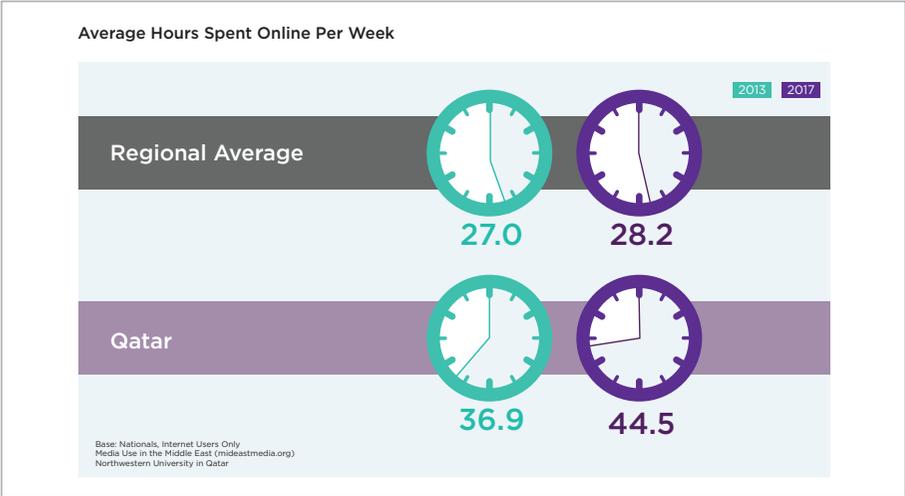


Base: Qatari Nationals
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

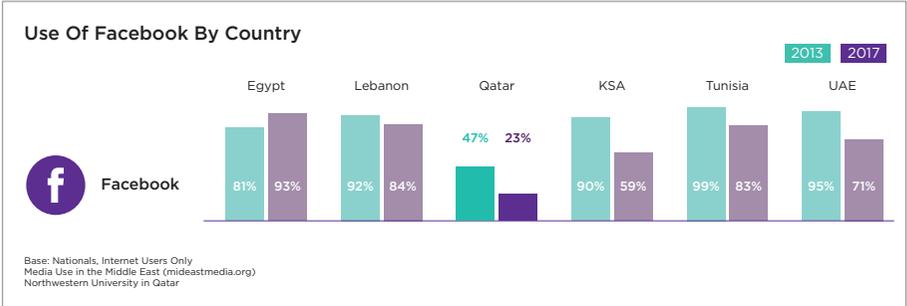
Internet and Social Media

Like Saudi Arabia and the UAE, Qatar has one of the highest internet use rates of any country in the world, approaching saturation at 95%. Qataris' use of offline media has decreased, and declines in offline media use have been more dramatic in Qatar than in other countries.

While internet use is lower among older Qataris—similar to other countries surveyed—it is still widespread: 82% of Qatari nationals ages 45+ use the internet. (96% 18-24 year-olds, 100% 25-34 year-olds, 97% 35-44 year-olds, 82% 45+ year-olds).

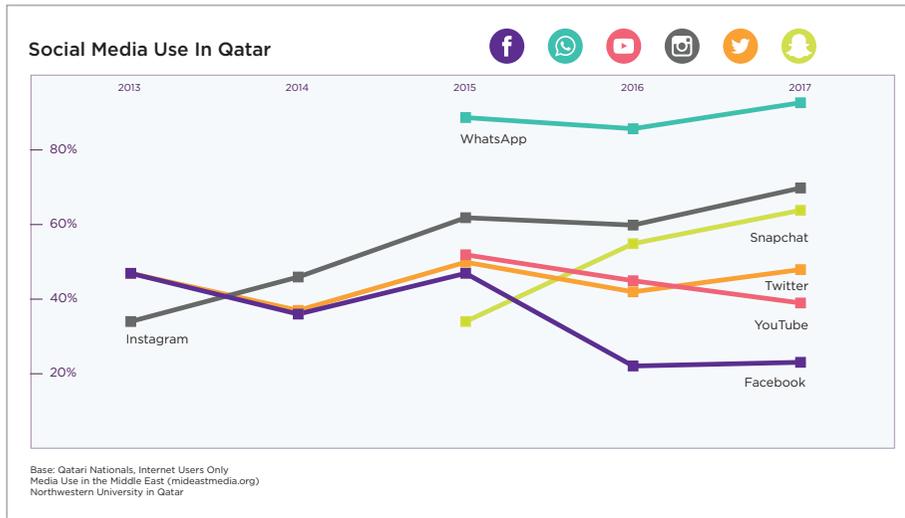


Qataris also spend a lot of time online, far more than nationals in other countries—indeed, a full waking day longer. Qataris estimate they spend an average of 44.5 hours a week online, compared to a regional average of 27 hours. This is a substantial increase from 2013, when Qatari nationals who use the internet averaged about 37 hours a week online.



Qatar also has unique social media use patterns. Among all Qataris, 93% use WhatsApp, 70% use Instagram, and 64% use Snapchat. The latter two figures are among the highest penetration rates in the world for those two platforms, as well as the largest among countries studied here.

Qataris are also the least likely to use Facebook—just 23% use that service, far below other Arab countries in the study.



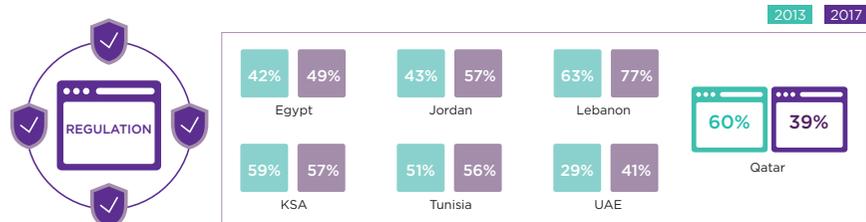
YouTube use also dropped sharply among Qatari internet users, from 52% in 2015 to 39% in 2017. (By contrast, YouTube use has remained fairly stable across the region.)

Instagram use rose in Qatar since 2015, consistent with regional trends. Snapchat also increased in popularity in all countries, though Qataris are still far more likely to use Snapchat than nationals in the other countries. While Twitter use dropped across the region, it is stable in Qatar.



Qataris, along with Emiratis, spend the most time face-to-face with family each week—despite increased time spent online. Qataris now say they spend an average of 43.2 hours a week with family, up from 35.5 hours in 2013.

The internet in this country should be more tightly regulated than it is now



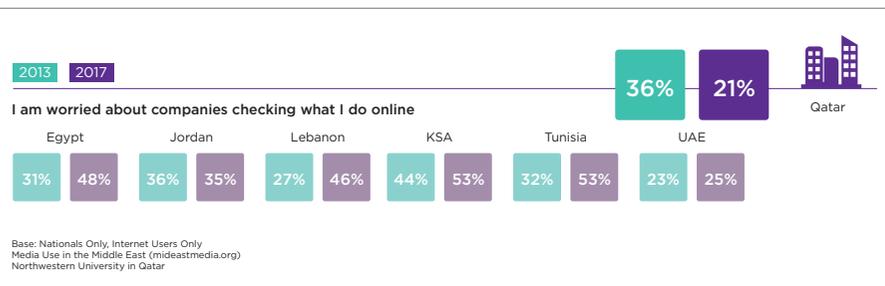
Base: Nationals Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Internet Regulation, Privacy and Security

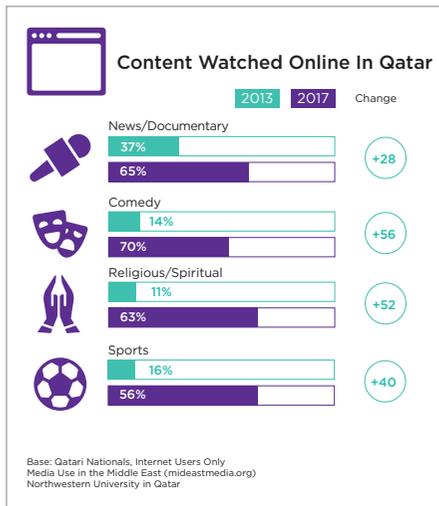
Qataris are less likely than other nationals to support greater internet regulation; support for internet regulation dropped 21 points in Qatar between 2013 and 2017, from 60% to 39%. In all other countries except Saudi Arabia, more nationals said they want more internet regulation in 2017 than in 2013.

Nearly one in five Qataris who use the internet say concerns about privacy have changed the way they use social media. There's also a growing number who are turning to private networks—in 2017, 13% of Qatari nationals who use the internet said they use a VPN or similar service, a figure that doubled from the previous year (6%).

Qataris are the least likely nationals to express concern about company surveillance—only 21% express concern about companies checking what they do online, down from 36% in 2013.



Base: Nationals Only, Internet Users Only
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

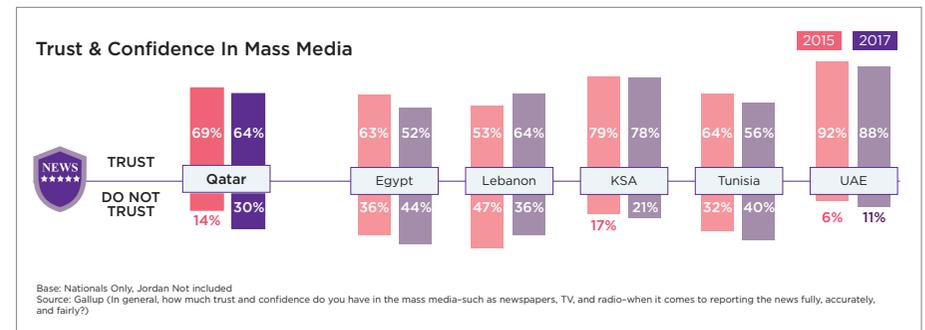
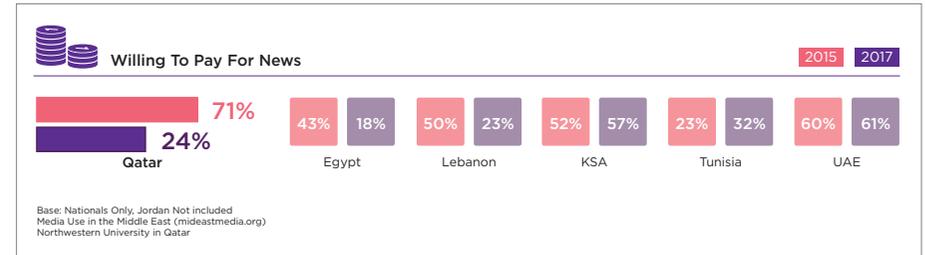


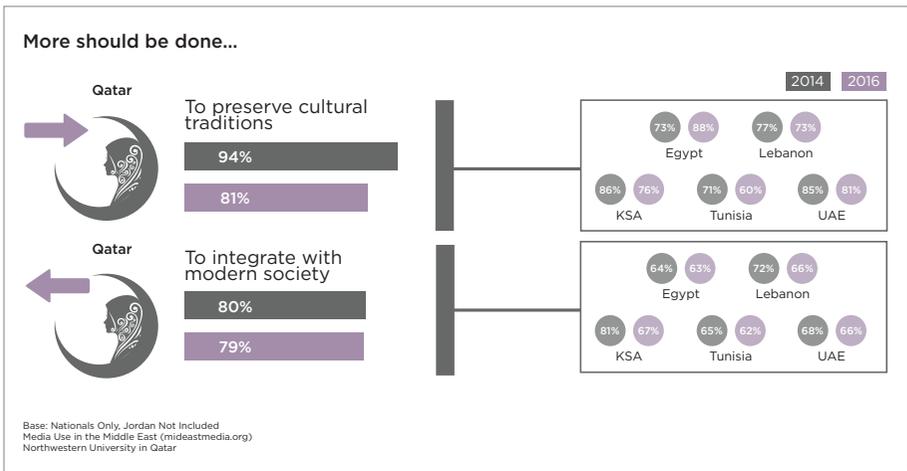
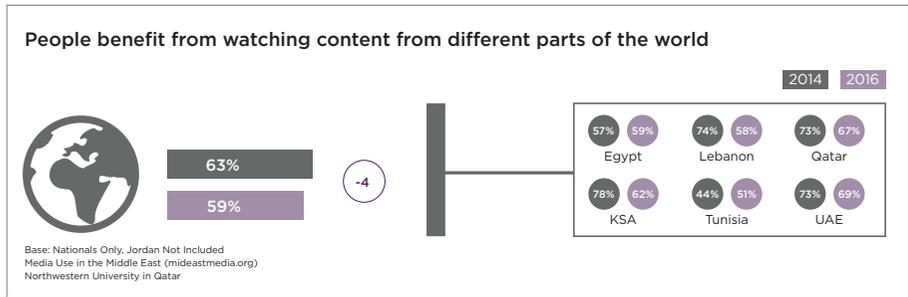
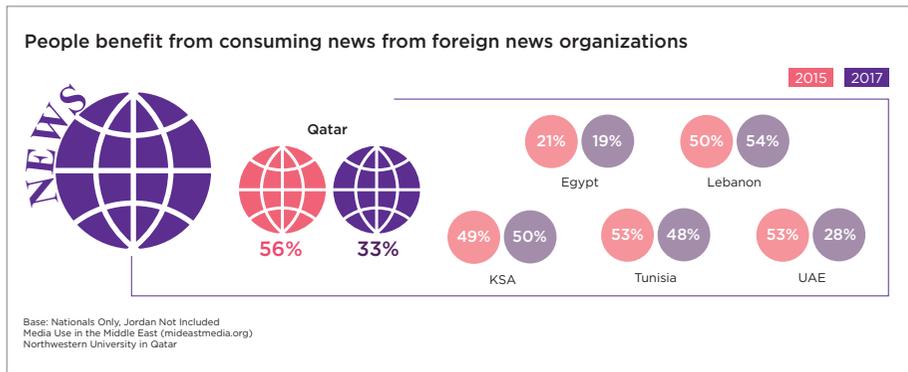
News Consumption and Perceptions

Roughly two-thirds of Qatari internet users watch news, comedy, and religious/spiritual content online, and more than half watch sports content online—sharp increases for all since 2013. More Qataris now watch content online than on TV, and are the first citizenry in this study to report this difference.

Compared to 2015, Qataris are far less willing to pay for news content—in 2017, 71% said they are unwilling to do so, compared with only 24% in 2015. Qataris are now the nationals least likely to express willingness to pay for news content, behind only Egyptians.

Fewer Qataris trust news media than other nationals—nearly one-third of Qatari nationals say they do not trust mass media, more than double those who expressed this view in 2015. There's also growing skepticism of foreign news. The belief that people benefit from consuming news from foreign news organizations declined in Qatar from 56% in 2015 to 33% in 2017. Additionally, the percent who feel foreign news is biased against Qatar nearly doubled between 2015 and 2017, from 7% to 13%.

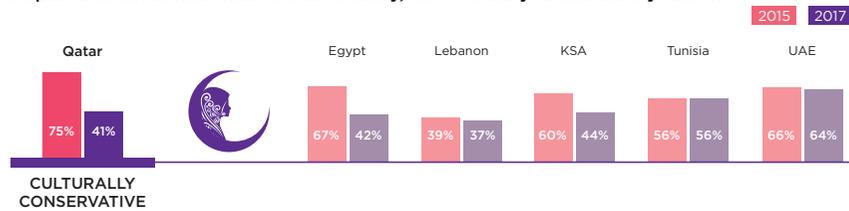




While most Qataris feel that people benefit from watching entertainment content from different parts of the world, that figure fell from 73% in 2014 to 67% in 2016. Overall, though, Qataris and Emiratis are still most likely to see benefits in foreign entertainment content.

Cultural Preservation
Qataris are among the most likely to believe more should be done to preserve cultural traditions, but this sentiment has softened, dropping from 94% in 2014 to 81% in 2016. Qataris also say, far more than any other nationals in the study, that their culture should do more to integrate with modern society. Eight in ten Qataris in both 2014 and 2016 held this sentiment.

Compared to most nationals in this country, how would you describe yourself?



Base: Nationals Only, Jordan Not included
Media Use in the Middle East (mideastmedia.org)
Northwestern University in Qatar

Qatari nationals are now less likely to identify as culturally conservative—just 41% in 2017 identified as culturally conservative, down from 75% in 2015. Egypt and Saudi Arabia saw a similar decline over time in nationals identifying as culturally conservative.

WOMEN IN QATAR SPEAK UP

Expert Commentary: Ilhem Allagui

Five years of the Media Use in the Middle East survey have been instrumental in revealing the socio-cultural implications of internet and social media use in seven countries of the Arab region. Here, I use insights from the survey to reflect on the way social media enable women's active social participation and empowerment in Qatar.

The most striking finding in the data is in the use of the internet for political influence. More Qatari women than men (39% vs. 32%) find the internet to be a tool for political influence. Similarly, more Qatari women than men (43% vs. 39%) think that by using the internet, public officials will care more about what people think. The number of Qatari women who think that the internet should be regulated dropped to 40% in 2017, down from 58% in 2013, indicating their advocacy for more media freedom and less government control. This comes at a time when women are appointed by the Emir to the advisory council for the first time in Qatari history, giving them a voice in political decision-making.

Online education is another empowering tool that seems to be gaining favor among women in Qatar. After Saudi Arabian women, women in Qatar are the second-most interested in online education. Among them, 7% pursue online courses to obtain a certificate or degree, behind Saudi Arabia yet ahead of all the remaining Arab countries.

Overall, data show a significant growth over the last three years in women's use of social media platforms in Qatar, including WhatsApp, Instagram, Snapchat, Twitter, and YouTube. Not surprisingly, women's use of social media has shifted from a tool for networking and consuming content to a tool that enables them to create content and contribute to public conversations. This contribution is now even more significant than men's. Some remarkable facts include:

- In 2017, more women in Qatar than men posted messages on social media.

- While both men and women produced more online content in 2017 compared to 2015, the growth of women producing content was larger than men's (a jump from 77% to 83% for women vs. 81% to 82% for men).

More women in Qatar are also using social media for career planning. Although across the Middle East this type of social media use remained low in 2017, with less than 30% of women using LinkedIn², data show higher growth of adoption rates among women in Qatar using LinkedIn than men (5% growth for women between 2015-2017, compared to 3% growth for men).

Women's empowerment is a conversation of global scale, and women in Qatar are of course taking part in this conversation. Data show that increasing numbers of women in Qatar use social media to speak up, educate themselves, get informed, and think about their careers in a way unseen before—indicating women in Qatar are at pace with the global transformation.

1. "Qatari women/men" refers to Qatari women or men who are nationals and "women in Qatar" includes women of all ethnic groups residing in Qatar. 2. The Arab Social Media Report 2017: Social Media and the Internet of Things. www.mbrsq.ae/getattachment/1383b88a-6eb9.../Arab-Social-Media-Report-2017

SUMMING UP AND MOVING FORWARD

After five years of close study, the Media Use in the Middle East research has set baselines for understanding the media ecosystem of the region and the drivers of change that are influencing communication between and among peoples, institutions, nation states, and society itself. In the first study in 2013, just after the Arab Spring, the contours of change were already evident. Traditional media platforms and sources still held great sway while the digital revolution gained ground. Internet penetration was already striking in the Gulf states while it lagged far behind in North Africa, contrasting the economic development and resources of media-rich vs. media-poor countries, a function of their individual economies. Over five years, internet growth soared in some places while making incremental gains in others. Print media, while still potent as news platforms, and television, the preferred locus for entertainment, have seen their influence decline. A key factor is the rise of the smartphone. Another notable change is strengthened Arab language content across all media and the decline of English content. The notion that the internet speaks mostly English, even in the Arab world, is being debunked daily.

What has also been observed is greater access to information by people across the region and more robust creation of culturally-sensitive local content. The old notions of western communication imperialism, once a common narrative, has been eroded by robust media from regional satellite television to social digital media on which original content from news and information to religious and entertainment programs as well as sport are evident. The media use story is evolving thanks to a greater array of technological platforms and consumer demand. The studies that are represented in this publication offer both an expansive picture of the region where generalizing about the Middle East, Islamic, and Arab worlds has value, while at the same time honing in on individually distinct countries. As noted earlier, the selection of the countries was meant to cast a representative net and also highlight the differences one sees when focusing on a specific country. Regional studies like this one, set against international and global data, acknowledge common characteristics in language, religion, and geography, while also recognizing significant differences. There can be no truly composite regional portrait that does not call attention to variances and nuanced patterns of media use and consumption as well as people's attitudes about media and their functions.

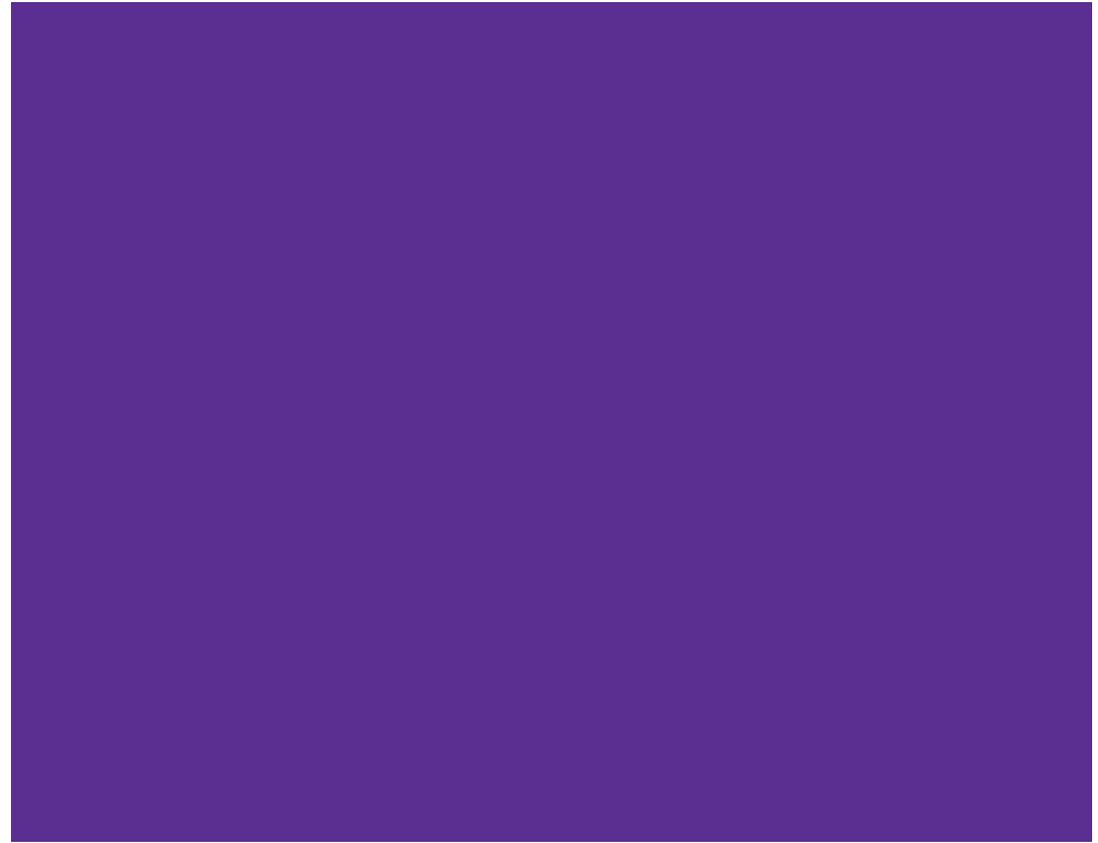
On matters of freedom of expression in the context of censorship and regulation, there is evidence of greater access to information and entertainment in spite of shifting regimes of media freedom. Many longstanding laws and media codes, set in place decades ago still hang on, but are challenged greatly by digital communication, where governmental controls are harder to enforce. Media freedom the world over is always in play and so it is in the Middle East. Rather robust and open expression exists alongside more restrictive rules, whether enforced or not. And clearly, laws to fight cybercrime have brought efforts to discourage free internet and social media discourse. While some of the hopes and dreams of the Arab Spring have dimmed, there is clear evidence that the internet has been an instrument for forward movement in public communication, mobile connections, and content.

It is these year-to-year shifts that propel this study forward. Social media use does change from year to year, both in terms of how it is used and why, but also in the choice of platform. Looking at how people in the region think about and use media is benefitted by the kind of demographic profile across national differences, gender,

age, income, education, and other variables that these studies offer. Well beyond drawing a portrait of the media ecosystem, these studies also offer a calibrated look at social change itself.

We reaffirm our commitment to these longitudinal studies using the tools of survey research—still a valuable instrument—for rigorous and scientific inquiry. To that end, this project has received funding from Qatar National Research Fund to continue the work for three more years, 2018-2020 during which our learning about and reflections on media use and media attitudes will no doubt deepen. These studies have also inspired secondary analysis by scholars, students, and media researchers as well as media industries, which we welcome. And while expansive quantitative studies like these have considerable value, we also welcome and urge more qualitative research, cultural analyses, ethnographic probes, and historical assessment that can help tease out, explain, and challenge our findings here. Research at its best is a continuing conversation that generates new knowledge, communicates it widely, and engages a critique that leads to refinement and change. The real value of studying media use is both conceptual and operational.

-E.E.D.



Northwestern University in Qatar

P.O. Box 34102
Education City
Doha, Qatar

www.qatar.northwestern.edu
www.mideastmedia.org