

2019

MEDIA USE IN THE MIDDLE EAST

A Seven-Nation Survey



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MEDIA USE IN THE MIDDLE EAST 2019

A Seven-Nation Survey

Led by:

Everette E. Dennis, LPI

Justin D. Martin, PI

Elizabeth A. Lance, Research Manager

Fouad Hassan, Research Assistant

In association with The Harris Poll

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mideastmedia.org

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TABLE OF CONTENTS

6	Introduction
10	Executive Summary
<hr/>	
14	Social Media
22	News
32	Media Use by Platform
42	Internet Use
50	Free Speech
58	Digital Privacy
66	Bias and Credibility
74	Social Media Influencers
82	Focus on Qatar
<hr/>	
88	Conclusion
92	Appendix A: Method
100	Appendix B: References and Related Research

INTRODUCTION

In one of the most dynamic and volatile regions of the world—the Middle East—the role of media only rarely makes headlines but warrants continuing attention as a window on what is happening among people, institutions, and society itself. What is known about the region internally and to the outside world is mediated by traditional news, opinion, and entertainment platforms—and increasingly by ever-changing social media. For the seventh time since 2013, we at Northwestern University in Qatar have conducted a far-reaching survey of media use in the region. We focus on seven countries from Egypt and Tunisia in North Africa across to the continent embracing Saudi Arabia, Qatar, United Arab Emirates, Jordan, and Lebanon to construct a representation of this very complex region that is so often stereotyped. With a prevailing image of the Arab region instability marked by conflict and disruption, this Media Use in the Middle East study paints a more nuanced picture that adds richly to the parameters defined by the dominance of the Arabic language and Islamic faith in the region.

These continuing studies originally inspired by the upheavals of the Arab Spring and a desire to take continuous soundings of how people use their media and what they think about them have proved useful as their findings offer intelligence in understanding change across the region—and country by country—accentuating both similarities and differences. Our studies which began in 2013 focus especially on news and information media in odd-number years (2013, 2015, 2017 and now, 2019) and more on entertainment media in even-numbered years (2014, 2016, 2018, and soon, 2020). Each year, we revisit many of the same questions to facilitate comparisons over time and add new ones reflecting important developments.

As we noted in our 2018 report: *We chose to assess and report on communication in the region writ large as legacy and emerging media have interacted and change the face of the*

information ecosystem and landscape. Thus, serious attention to media use itself as media were transforming themselves, and people's attitudes toward them have been essential to our storyline. Indeed, the MENA region and especially the Gulf States have experienced a variation of the same kind of media disruption seen in the other advanced information societies, and the changes reported here confirm that.

This 2019 report pays special attention to social media and social media influencers even as it focuses heavily on news media. As always, we look at media use by platform and content while also honing in both generally and in detail on the use of the internet. As a member of the World Internet Project based at the USC Annenberg School for Communication, we contribute to that global survey and are the sole source of Middle East regional data.

When we began these studies, the concept of social media influencers had little currency. While a few notable internet opinion leaders at the heart of the various Arab revolutions gained some fame, the idea of such individuals having continuous impact or influence went mostly unremarked. Most often commentators imagined that high profile establishment individuals, institutions, and organizations would be vessels of messaging continuity given their larger resources and capacity for strategic communication. But social influencers were in plain sight the world over with popular culture celebrities and political leaders taking center stage. Given intense internet penetration and the role of social media in the Arab Spring and thereafter, it was natural that social media influencers, which we define as “social media users with established credibility in a certain industry or content type...with access to a large audience”, should be included in the study. Data in this

study attest to the large and growing following that social media influencers have, with topics ranging from fashion and sport to women's issues. While acknowledging the importance of such influencers, only a few named influencers were identified as standouts in contrast with the West where they are well known for consumer and social influence—or more viscerally in making news as is the case with U.S. President Donald Trump whose tweets are seen as an instrument of disruption, though his followership is much less than that of other famous people including former President Barack Obama. In Chapter Eight, we tease out the data on social media influencers and consider who posts and what platforms they use as well as the role of social media as a source of news and even notable social media influencers.

In this study and those that came before, we pivot from paying strict attention to indicators of media use and preferences in a comparative context to attitudes about media and their influence. This means considering the relationship between individual media users and accumulated audiences about free speech. As always there is a continuum between freedom on the one hand and control on the other, involving not just government constraints and discouragement but those in the private sector as well. It is important to note that censorship which is an instrument of the state blends with private sector enterprises in countries where much of media is subsidized by government, either directly or indirectly.

For the second year, we have conducted this research in the midst of the blockade of Qatar by several of its neighbors, a situation that has triggered a veritable information war that brings with it competing public relations campaigns between and among countries included in our study as well as disinformation including fake news. The media ecosystem we study is obviously affected by these conditions, though we've been able to conduct our work despite such challenges,

opting to be the neutral observer listening to people across the region who agree to be respondents in this study.

While free speech in the broader context of freedom of expression is the organizing framework for our examination of the social fabric with which media interact, we take a deeper dive into digital privacy along with perceptions of bias and credibility. While broadly and specifically looking at media and perceptions of media across our conception of the region, we also drill down on differences between and across media. We also present a more comprehensive view of media use and attitudes toward media with a special focus on Qatar. We do this both because we are in Qatar and because Qatar has one of the highest internet penetrations in the world and by any measure warrants a closer look. Full disclosure requires we acknowledge that much of our funding for the study comes from the Qatar National Research Fund and other sources in the country where our partners include Al-Jazeera and Doha Film Institute among others. That said, no effort has ever been made to influence our research at any stage of its development, direction, or dissemination.

Our work benefits from a unique collaboration with The Harris Poll, which has been our partner for data collection and fieldwork since our first study. Our relationship with Harris and notably Kerry Hill and David Krane, along with the wise counsel of Humphrey Taylor is akin to a continuing seminar in which members of our research team discuss matters ranging from the scope and purpose of the study with changes each year to refinement in question construction and considerations about navigating authorities in the various countries where the study is conducted, itself a lesson in geopolitics for us all.

As we scope out and develop the study each year, we engage our colleagues from NU-Q's faculty, staff, and students who generously attend a public meeting to discuss the study and offer suggestions for new questions and other keen observations that help us calibrate the questionnaire to reflect needed changes that require adjustments as we refine continuing questions and add new ones. Faculty and staff bring their own expertise from a school dedicated to media and communication with considerable attention to digital media. Students play an important role as heavy users of social media whose insights are often telling and extremely useful. To all we are grateful.

This year our research team was joined by Professor Ilhem Allagui of NU-Q's faculty of Journalism and Strategic Communication as a Principal Investigator in the same year she authored a book titled *Advertising in MENA Goes Digital* (Routledge, 2019). An expert on media and strategic communication with long experience and expertise in the Middle East, she brings new strength to our team.

As always, the work represented here has several distinctive features as a longitudinal study with more than 7,000 face-to-face and telephone interviews, the only such study in the Middle East and one of the few continuing research projects of this scope and rigor in the world.

We can again report that this study and those that preceded it are directed to students, scholars, media professionals, social institutions, and the general public.

The executive summary that follows summarizes overall findings while paying special attention to changes from data collected in 2017 and previous years. While there is some consistency, even stability, in some of the findings, the continuous interplay between media platforms' whole reach and penetration do vary from year to year, it is in the realm of social media where change is most often observed. These calibrations tracking the ups and downs of familiar social media platforms are especially useful as these new and young media emerge and evolve.



Everette E. Dennis
Lead Principal Investigator,
Dean & CEO,
Northwestern University in Qatar

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EXECUTIVE SUMMARY

Below are the key findings from this study, which are explored in detail in the chapters that follow. Results are based on in-person and telephone surveys of 7,303 respondents across seven Arab countries: Egypt, Lebanon, Jordan, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates. Data were collected June 20 to October 06, 2019.

Social Media

- Tunisians, Lebanese, and Qataris report having the most followers/friends on social media platforms, Saudis and Emiratis the least. (Respondents were asked about their network sizes on Instagram, Facebook, Twitter, and Snapchat.)
- The percentages of Arab nationals using the Facebook-owned platforms of WhatsApp, Instagram, and Facebook Messenger have been flat since 2017. However, use of Facebook proper, which had been falling in Arab countries since 2014, rebounded somewhat in 2019, driven by increased penetration in Qatar, Saudi Arabia, and Tunisia. This may be partly due to gaming options Facebook began offering in March 2019.
- Twitter penetration rates have fallen or stagnated in most countries since 2018.
- Women are more likely than men in three countries (Tunisia, Qatar, and UAE) to share photos or videos online that personally feature themselves however, in Jordan, men are more likely than women to share such content. (No measurable gender differences were observed in Egypt, Lebanon, or Saudi Arabia.)
- Snapchat penetration plummeted in Qatar and the UAE but rose modestly in Saudi Arabia and several countries outside the Arab Gulf: Egypt, Jordan, and Tunisia.

News

- The share of Arab nationals who get news on TV every day has fallen since 2017 and is now at parity with the percentage of nationals who get news online every day (nearly 7 in 10). More specifically, the percentage of nationals who get news every day from a smartphone has risen since 2017 in every country but Tunisia.
- Getting news on smartphones is increasingly common yet posting or sharing news online is less common among nationals than in 2017.
- The proportion of nationals getting news every day fell across multiple content areas: their local community, their country, other Arab countries, and non-Arab countries.
- More Arab nationals get news on Facebook (42%), WhatsApp (30%), and YouTube (24%) than from any other major social media platforms.

Media Use by Platform

- TV use, previously more resistant to decline in Arab countries than in other parts of the world, has started to fall: 98% of Arab nationals in 2013 watched TV at least sometimes, and in 2019 that figure is 86%.
- Large majorities of nationals in Arab Gulf countries listen to podcasts—more than in the other Arab countries in the study and also more than people in the U.S.

1. Note some figures in this report do not include Egypt, Jordan, or Qatar, as officials in these countries did not permit the fielding of certain questions in some years of the Media Use in the Middle East study—Egypt and Jordan in recent years and Qatar only in 2013 and 2015. Excluded items mostly relate to censorship, government, politics, and religion. Additionally, while Jordan was surveyed in the 2013, 2017, 2018, and 2019 editions of the study, it was not included in the 2014, 2015, and 2016 editions. Therefore, Jordan data are not included when comparisons are made with the years in which Jordan was not surveyed. In all charts that do not include data from Egypt, Jordan, or Qatar, a footnote so reports.

- The percentage of nationals using Netflix increased in most Arab countries surveyed from 2018 to 2019, while Shahid penetration fell in most countries. Netflix penetration has pulled roughly even with Shahid penetration in five of the seven countries.
- Anghami is more commonly used by nationals in all countries to stream music than is Spotify, with the exception of the UAE. Fewer than one in 10 nationals in any country use Spotify.
- The percentage of nationals who binge-watch TV or online series fell in five countries from 2018 to 2019 (all but Jordan and Lebanon), and the highest figure was 47% in Qatar, which is much lower than the same binge-watching figure in the U.S. (U.S.: 80%, Limelight Network, 2019).
- The percentage of nationals who exercise or play sports at least once a week has fallen in five of seven countries in this study since 2017; the exceptions are Jordan and Egypt, where the share of nationals who exercise is comparatively low and unchanged.
- If given the choice, nationals in all countries except the UAE are more likely to prefer watching a professional sporting event on TV or online versus watching the event in-person.

Internet Use

- Use of the internet in Arabic has continued to increase—79% of nationals now use the internet in Arabic, up from 69% in 2018, while using the internet in English (31%) has changed little.
- Arab nationals own smartphones in all Arab countries at rates similar to or higher than in the U.S., including in middle-income countries of

Egypt and Jordan. The only exception is Tunisia where smartphone penetration nonetheless increased to 72% by 2019.

- One in four Arab nationals uses a smartwatch to access the internet, and one in five nationals uses a smart home device to do so.
- In Egypt, where internet penetration has been and remains the lowest among the countries in this study since its inception, 75% of nationals now use the internet, roughly even with Tunisia.
- Arab nationals in 2019 report spending less time with family and friends each week both online and in-person compared to 2018.
- Just over half of Arab internet users (53%) say they use the internet on a computer, a steep decline from 2018 (73%). Ninety-six percent of internet users use the internet on a smartphone.
- The percentage of nationals who completed online coursework toward an academic degree in the prior year increased since 2017 in most (four of seven) countries.
- One in 10 or more of nationals in all countries, except Egypt and Lebanon, say they had worked online toward an educational degree or certificate in the prior year. One-third of Qataris in 2019 worked online toward an academic degree or certificate in the prior year, a large increase since 2018.

Free Speech

- Compared to 2017, nationals in several countries are more likely to say governments should not prevent people from criticizing governments, or from saying things offensive about religions or to minority groups.

- The percentages of nationals who say they feel comfortable speaking out about politics has fallen sharply in four countries since 2018 (Egypt, Qatar, Jordan, and UAE) but has remained the same or risen modestly in Lebanon, Saudi Arabia, and Tunisia.
- Since 2018, the percentages of Emiratis and Qataris who say people should be free to express unpopular ideas on the internet declined sharply.
- Only in three countries do majorities of nationals believe people should be able to criticize governments online (Lebanon, Saudi Arabia, and Tunisia); minorities in Qatar and the UAE agree, and Jordanians are split. (The question was not permitted in Egypt).
- However, Saudis are more concerned about online surveillance than other nationals, regardless of the specific kind of monitoring, and Qataris are least concerned about online surveillance compared to other nationals.
- The percentage of nationals who say they have changed their social media usage for privacy reasons has fallen since 2018 in every country surveyed except Egypt.
- Roughly half or more of nationals in four countries (Saudi Arabia, Egypt, Tunisia, and Jordan) worry about companies using information about them without their consent.

Digital Privacy

- Arab nationals in most countries more likely say WhatsApp, versus other social platforms, provides the most privacy; Tunisia is the exception as a plurality of nationals says no social media platform protects privacy.
- Fewer than half of nationals in all countries share photos or videos personally featuring themselves on social media, except in Lebanon where 51% of nationals do so.
- Within countries, similar percentages of nationals say they worry about governments, companies, and other internet users monitoring what they do online.
- In most countries where large percentages of nationals say they trust news media, large percentages of nationals also say they trust news from social media.
- Higher proportions of nationals in five countries say that international news coverage is biased toward their country than say such coverage is biased against their country. The opposite is the case in Lebanon. (The question wasn't permitted by officials in Egypt.)
- The percentage of nationals who believe news media in their country are credible increased or was unchanged since 2018 in all countries, except in Qatar, where the figure decreased precipitously.

Bias and Credibility

- The percentages of nationals who see international news coverage as biased toward Arab countries other than their own has increased in four of six countries (Egypt, Jordan, Lebanon, and UAE) since 2017. (The question was not permitted in Egypt.)
- Arab nationals in the survey are much less likely than non-nationals to say they trust news media across several origins: in general, in their country, on social media, from Western countries, and from other Arab countries.

Social Media Influencers

- Three in 10 nationals look at online posts from social media influencers at least once a day, more than the proportion of nationals who check email or play games with the same frequency.
- The percentages of nationals in four countries (Jordan, Egypt, Lebanon, and UAE) who get news from social media influencers at least once a day is greater than the percentage who get news from newspapers at least once a day.
- Three in 10 nationals look at Instagram posts/stories by social media influencers, and slightly fewer nationals (24%) do the same on Facebook, among users of each platform.
- Non-nationals are more likely than nationals to follow social media influencers and to engage with influencers online.

Focus on Qatar

- Qataris report spending less time online in 2019 than in previous years. Meanwhile, the percentage of Qataris who get news from TV at least once a day increased between 2017 and 2019, from 39% to 68%.
- The amount of time Qataris report spending in-person with family each week has fallen dramatically since 2017, from 43 to 11 hours per week in 2019. Qataris also report spending less time in 2019 than in 2017 online with family and both in-person and online with friends. Other countries in this study have also seen decreases in these measures, though the differences are less stark.
- The percentages of Qataris using WhatsApp, Instagram, Snapchat, and Twitter have fallen sharply since 2017. Facebook penetration, which had been falling in Qatar since 2015, rose between 2018 and 2019, from 9% to 30%.
- Qataris are less likely than any other nationals to say the internet in their country should be regulated for political or culturally sensitive content.



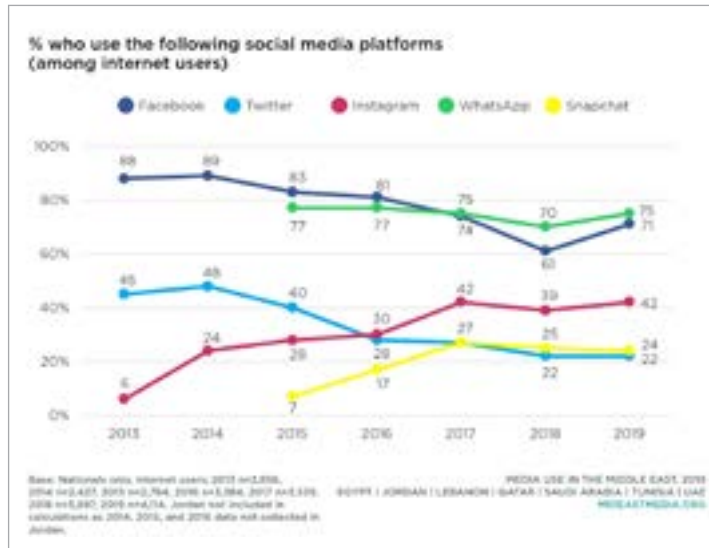
SOCIAL MEDIA



In this chapter

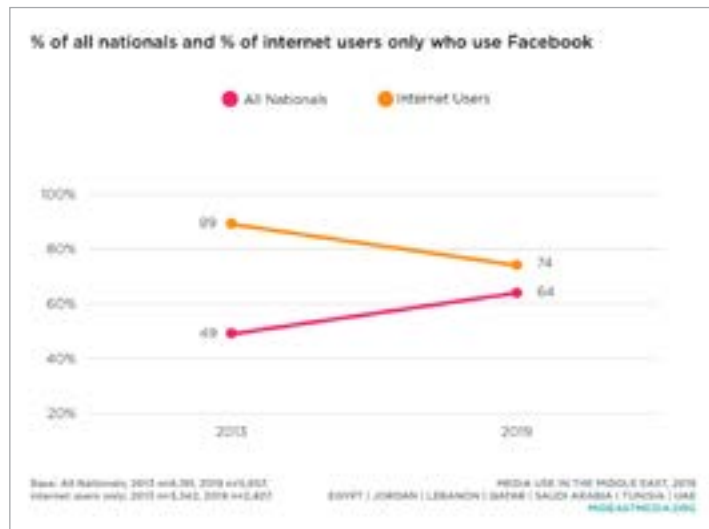
- Social media use
- Followers and friends on social media
- Activities on social media
- Direct messaging

Social media use

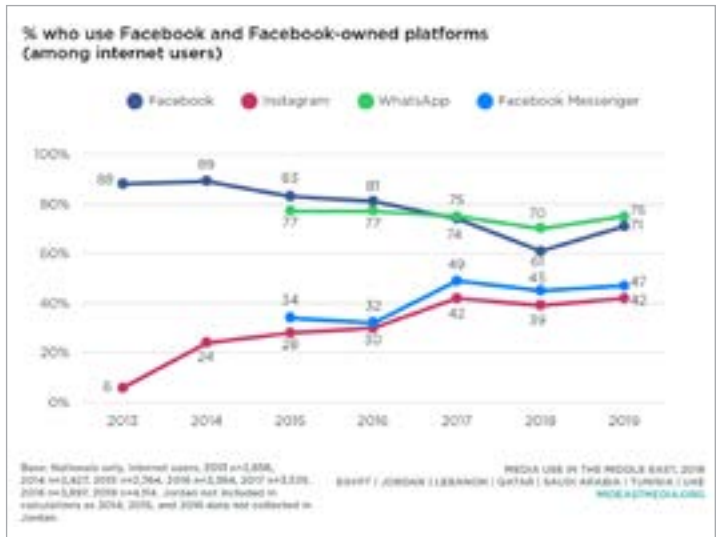


Penetration of platforms like Snapchat and Instagram has leveled off over the past two years in the Arab countries in the study. Twitter has continued its decline, and Facebook has rebounded in a few countries.

More respondents use Facebook and WhatsApp than any other social media platforms, as they are cited by about two-thirds of all nationals—much higher than penetration rates for Instagram, Twitter, or Snapchat. This pattern has been stable in recent years, although use of Twitter has dropped significantly among Arab nationals since 2014 and is now at only one in five. Use of other platforms remains stable or rose in the same time period. Notably, Instagram use rose more than ten-fold from 2013 to 2018, though the increase from 2018 to 2019 was just 5 percentage points. Facebook’s popularity rose 12 percentage points in the past year but is still down 15 points from 2013.

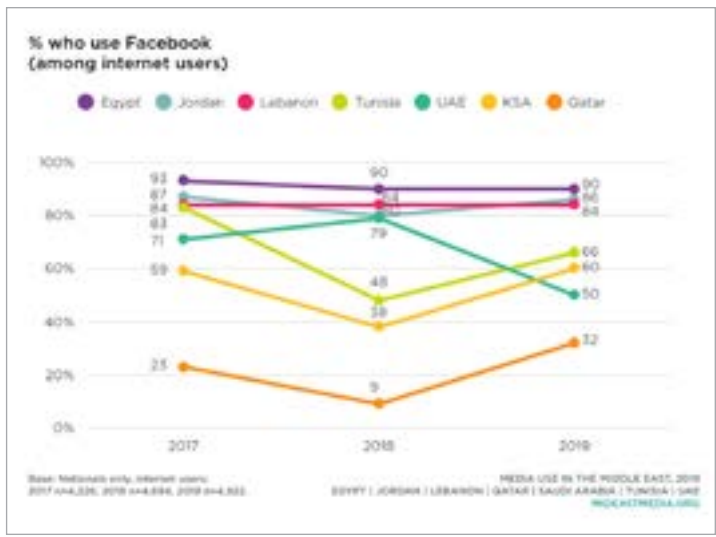


While use of Facebook among all nationals has increased over time due an overall increase in the number of internet users since 2013, Facebook use among internet users has actually declined over time.



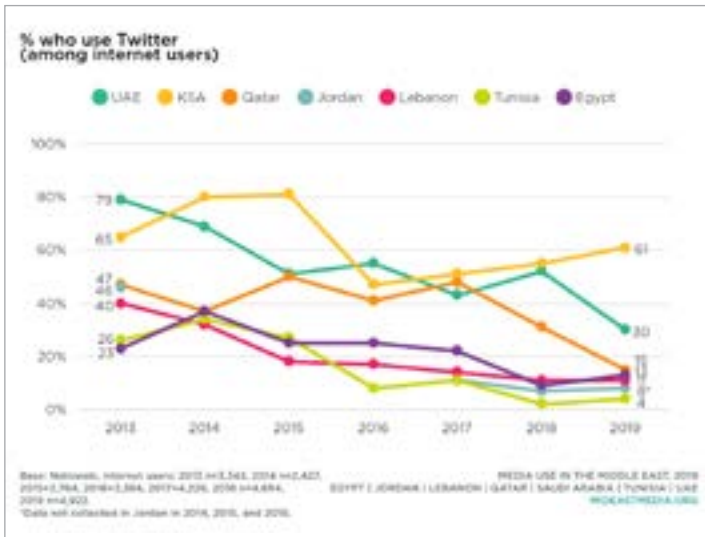
Use of Facebook and WhatsApp vary little by age or education, but younger internet users are almost two to nearly four times as likely as the oldest internet users to use Instagram, Snapchat, and Twitter (Instagram: 60% 18-24 year-olds, 45% 25-34 year-olds, 30% 35-44 year-olds, 17% 45+ year-olds; Snapchat: 40% 18-24 year-olds, 29% 25-34 year-olds, 18% 35-44 year-olds, 8% 45+ year-olds; Twitter: 21% 18-24 year-olds, 21% 25-34 year-olds, 19% 35-44 year-olds, 14% 45+ year-olds).

Use of marquis social media platforms also rises markedly among more educated internet users (Instagram: 13% primary or less, 19% intermediate vs. 44% secondary, 48% university or higher; Snapchat: 8% primary or less, 8% intermediate vs. 30% secondary, 28% university or higher; Twitter: 1% primary or less, 5% intermediate vs. 20% secondary, 25% university or higher).



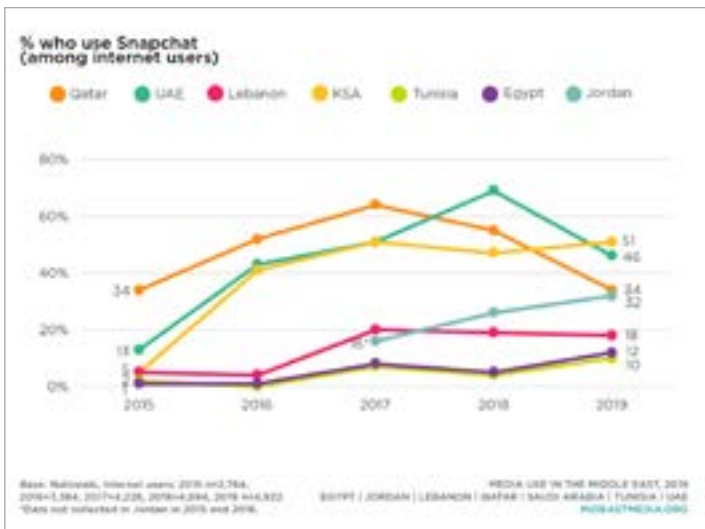
Looking at Facebook-owned platforms, Facebook and WhatsApp are used by more internet users than Instagram or Facebook messenger.

Facebook penetration varies widely across the region—from nine in 10 Egyptian internet users to just one-third of Qatari users—but it has dropped in every country except Egypt since 2013, most notably in Saudi Arabia, Tunisia, and the UAE. An uptick in Facebook penetration in a few countries since 2018—in Qatar, Tunisia, and Saudi Arabia—is possibly driven by gaming options added to the platform in early 2019, which have drawn some new users to Facebook and encouraged some erstwhile users to return (TechCrunch, 2019).

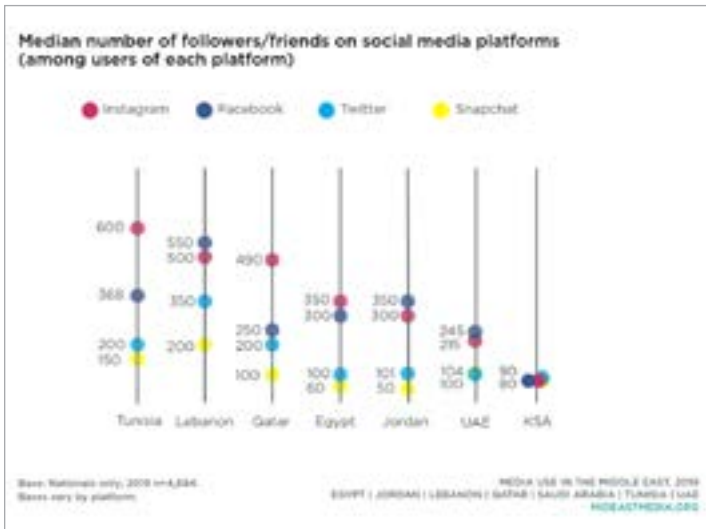


Twitter penetration varies widely—ranging from six in 10 Saudis to only 4% of Tunisians—and rates have dropped in every country since 2013. Of note, though, there’s evidence of a comeback for Twitter in Saudi Arabia after a steep decline between 2015 and 2016.

Snapchat grew in popularity in Saudi Arabia, Jordan, Egypt, and Tunisia from 2018 to 2019 but declined in Qatar and the UAE in the same period. Snapchat use is highest in Saudi Arabia and the UAE.



Followers and friends on social media



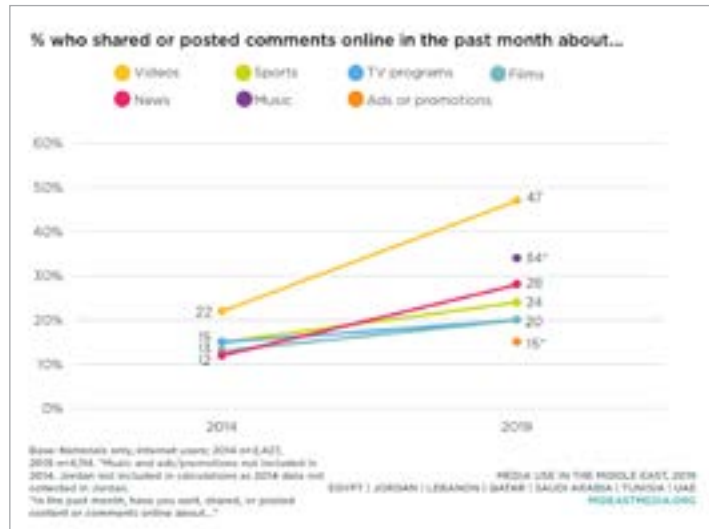
Users of major social media platforms tend to have more followers and friends on Instagram and Facebook than on Twitter and Snapchat, according to respondents' estimates. Tunisians, Lebanese, and Qataris report the most followers and friends across social media platforms, while Saudis report the fewest.

The number of friends among Facebook users has risen since 2016 in every country, in some countries dramatically (Lebanon: 200 in 2016 to 550 in 2019; Egypt: 100 to 300; Qatar: 100 to 250; UAE: 100 to 245; Tunisia: 332 to 368; KSA: 60 to 80; data not collected in Jordan in 2016).

Men report having more followers and friends on major platforms than do women (Facebook: 441 men vs. 280 women; Instagram: 370 men vs. 300 women; Twitter: 150 men vs. 100 women; Snapchat: 100 men vs. 80 women).

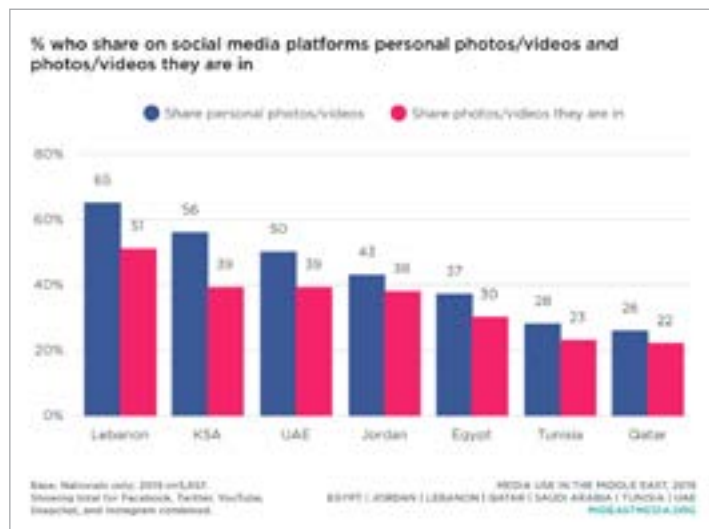
Younger nationals report having more followers and friends on each major platform than those in older age groups (Facebook: 478 18-24 year-olds, 400 25-34 year-olds, 300 35-44 year-olds, 200 45+ year-olds; Instagram: 422 18-24 year-olds, 300 25-34 year-olds, 200 35-44 year-olds, 181 45+ year-olds; Twitter: 135 18-24 year-olds, 200 25-34 year-olds, 100 35-44 year-olds, 70 45+ year-olds; Snapchat: 100 18-24 year-olds, 90 25-34 year-olds, 80 35-44 year-olds, 80 45+ year-olds).

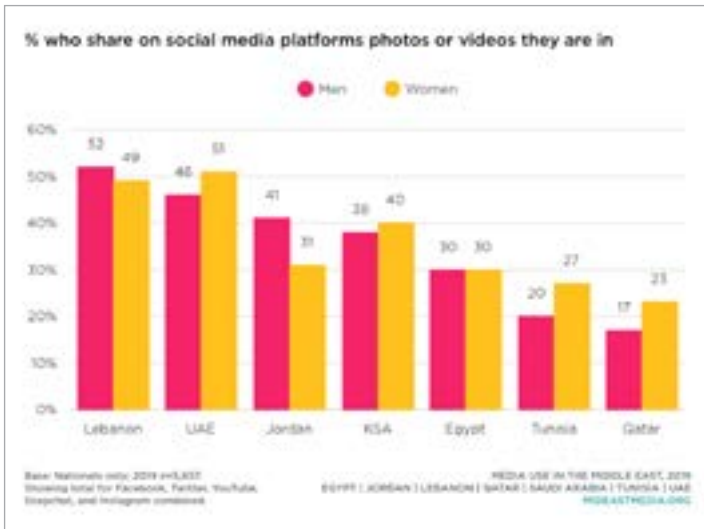
Activities on social media



Internet users in Arab countries share a variety of content on social platforms but none more than online videos. Nearly half of internet users report sending, sharing, or posting comments about videos online in the past month, followed by three in 10 who posted about music and news, and about two in 10 posting about each sports, films, and TV programs. Twice as many internet users share about several topics now than did five years ago, including news.

Online photo and video sharing vary widely by country. Half or more Lebanese, Saudis, and Emiratis share personal photos and videos online, while fewer nationals in other countries do the same. Nationals are less likely to share photos and videos they are in. Lebanon is the only country where more than half of nationals share personal images/videos of themselves. Tunisians and Qataris are the least likely to share photos and videos of any kind online.



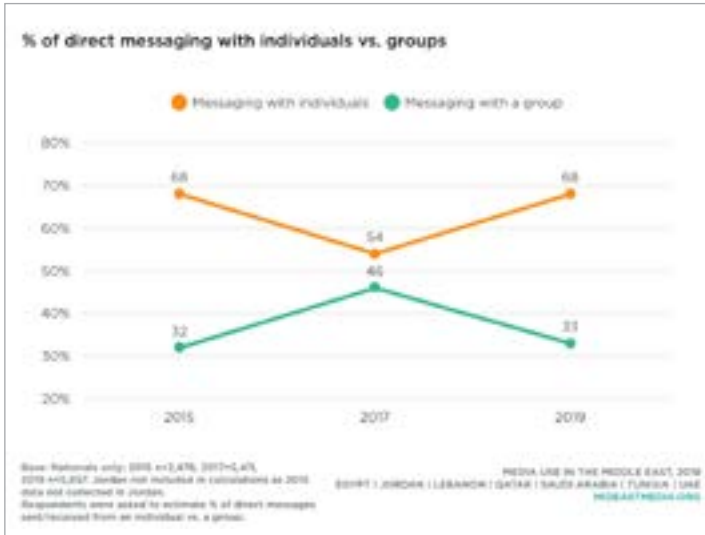


These data counter a common gender stereotype that women are less likely than men to share photos or videos of themselves online. While perhaps true in Jordan, not only are men and women in Lebanon, KSA, and Egypt equally likely to share photos or videos they are in, but women are more likely than men in Tunisia, Qatar, and the UAE to share images of themselves on social media.

On Facebook, the youngest users (18-24) are less likely than the oldest users (45+) to get or share news (getting news: 61% 18-24 year-olds vs. 74% 45+ year-olds; sharing news: 47% 18-24 year-olds vs. 54% 45+ year-olds). On Twitter, the youngest users are more likely to share personal photos or videos including ones featuring themselves (personal photos/videos: 33% 18-24 year-olds vs. 14% 45+ year-olds; photos/videos they are in: 18% 18-24 year-olds vs. 10% 45+ year-olds).

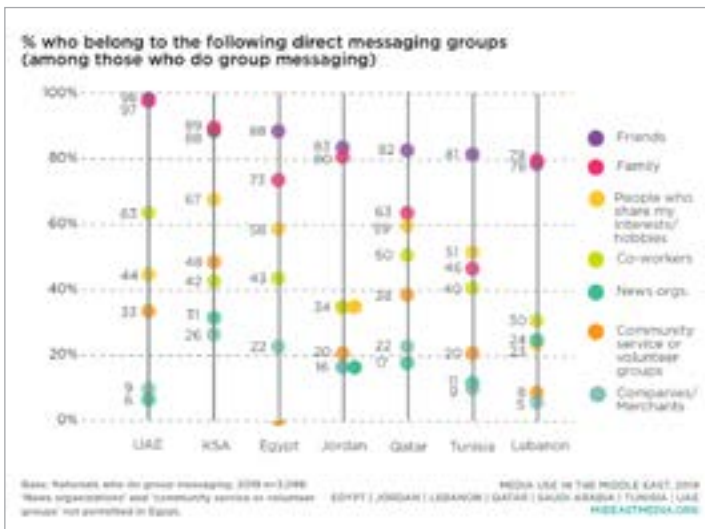
Instagram is more popular among younger respondents, and younger Instagram users are also more likely than their older counterparts to get entertainment content, share personal content, and to keep up with social media influencers on the platform (get entertainment: 50% 18-24 year-olds vs. 37% 45+ year-olds; share entertainment: 43% 18-24 year-olds vs. 34% 45+ year-olds; share personal photos or videos: 53% 18-24 year-olds vs. 36% 45+ year-olds; view posts/stories from social media influencers: 34% 18-24 year-olds vs. 22% 45+ year-olds).

Direct messaging



Arab nationals estimate they direct message single individuals twice as much as with groups. This differs from an almost 50-50 split in 2017 but is consistent with the pattern observed in the 2015 edition of this study.

Still, group messaging is common, used by nine in 10 direct-messaging users. Group messaging with coworkers and with groups around shared hobbies are common, especially in the UAE, Qatar, Egypt, Saudi Arabia, and Tunisia. Messaging with community service and volunteer groups is highest in the Arab Gulf countries surveyed. Fewer direct messengers belong to groups promoted by news organizations or companies.





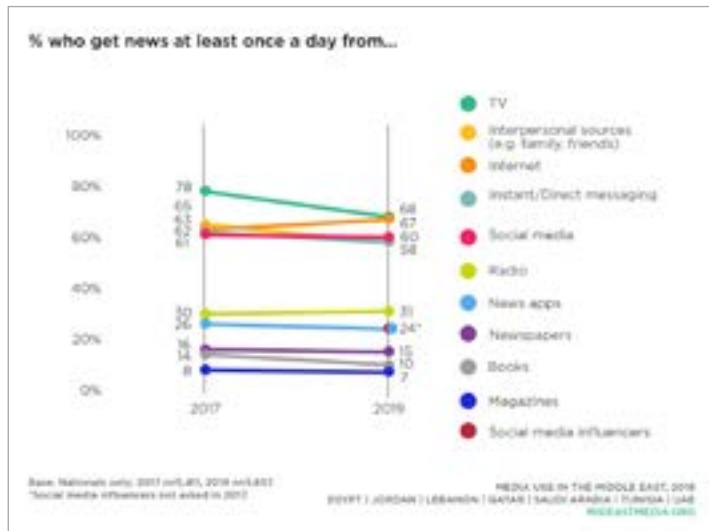
NEWS



In this chapter

- Sources for news
- Social media as a news source
- News topics
- Preferred news outlets

Sources for news

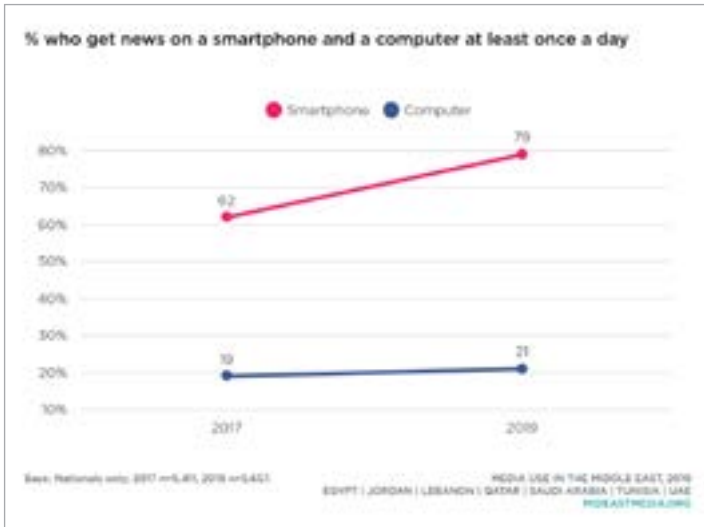


No longer the single most common source for daily news among Arab nationals, TV is now at parity with several digital news forms. In 2019, between six and seven in 10 nationals get news at least once a day not only from TV, but also from friends and family, the internet generally, and messaging apps and social media specifically. Small and dwindling percentages of nationals, however, report regularly getting news from print media.

Digital preferences for news consumption differ somewhat by nationality. While at least half of respondents in all nationality groups (Arab nationals, Asian expatriates, Western expats, Arab expats) get news online, Asian and Western expatriates are more likely to do so than either Nationals or Arab expats (internet: 75% Asian expats, 77% Western expats vs. 67% Nationals, 62% Arab expats; social media: 72% Asian expats, 74% Western expats vs. 60% Nationals, 56% Arab expats; instant/direct messaging: 74% Asian expats, 70% Western expats vs. 58% Nationals, 54% Arab expats).



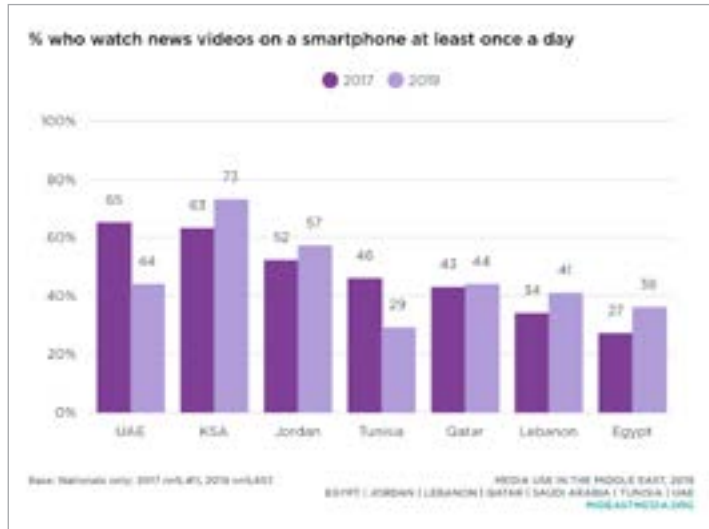
The percentage of Arab nationals who get news on a smartphone at least once a day has risen in every country since 2017, while getting news from TV every day increased only in four countries and fell in Tunisia, UAE, and Jordan. Saudi Arabia and Qatar experienced dramatic increases in daily TV news use, and Lebanon, Egypt, and Qatar saw the largest increases on smartphones.



Additionally, while more nationals in the region are turning to their smartphones for news on a daily basis (up 17 percentage points from 2017), checking for news on a computer has remained low at one in five.

Almost nine in 10 nationals under 45 years old get news from a smartphone every day compared to about six in 10 nationals 45 or older (87% 18-24 year-olds; 88% 25-34 year-olds, 81% 35-44 year-olds, 59% 45+ year-olds). Just a third of nationals with a primary education or less get news from a smartphone every day compared to most with a secondary education or higher (32% primary or less, 67% intermediate, 83% secondary, 90% university or higher).

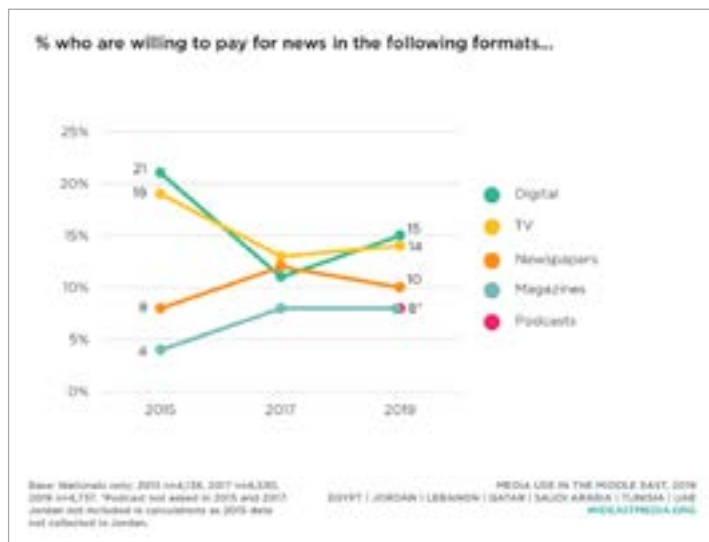
Majorities of nationals across all age and education groups get news every day from TV (age: 68% 18-24 year-olds, 74% 25-34 year-olds, 81% 35-44 year-olds, 86% 45+ year-olds; education: 80% primary or less, 80% intermediate, 76% secondary, 77% university or higher).



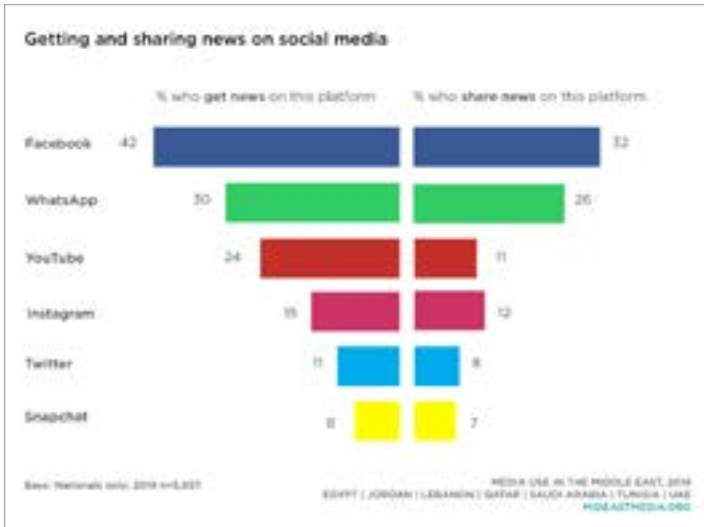
More specifically, the rates of watching news videos on smartphones rose in all countries except the UAE and Tunisia, especially in Saudi Arabia where three-quarters of nationals watch news videos on a smartphone every day.

News consumption in Arab countries is robust, but willingness to pay for it is less so. Overall, 10% to 15% of nationals across countries are willing to pay for news in any traditional or digital format, findings similar to those in 2017 but significantly lower for TV and digital than in the 2015 study.

Willingness to pay for news differs markedly across nationality groups, with Asian and Western expatriates more willing to pay than Arab nationals or Arab expats (digital: 28% Asian expats, 34% Western expats vs. 13% Nationals, 21% Arab expats; TV: 21% Asian expats, 33% Western expats vs. 12% Nationals, 24% Arab expats; newspapers: 30% Asian expats, 36% Western expats vs. 10% Nationals, 17% Arab expats; podcasts: 19% Asian expats, 32% Western expats vs. 8% Nationals, 13% Arab expats).

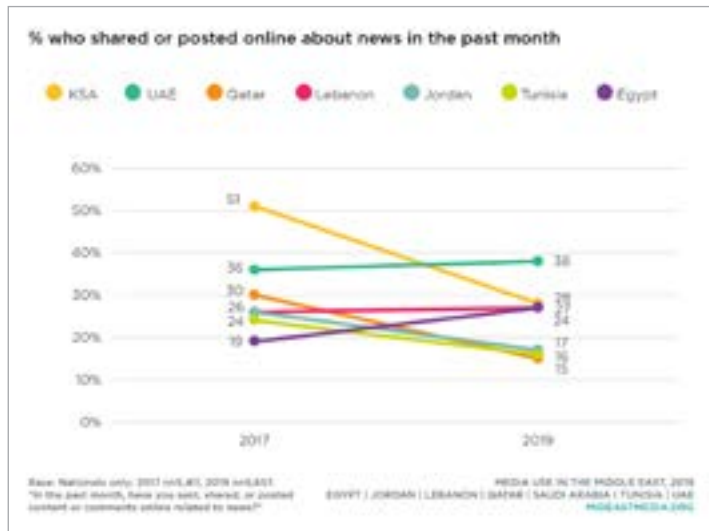


Social media as a news source



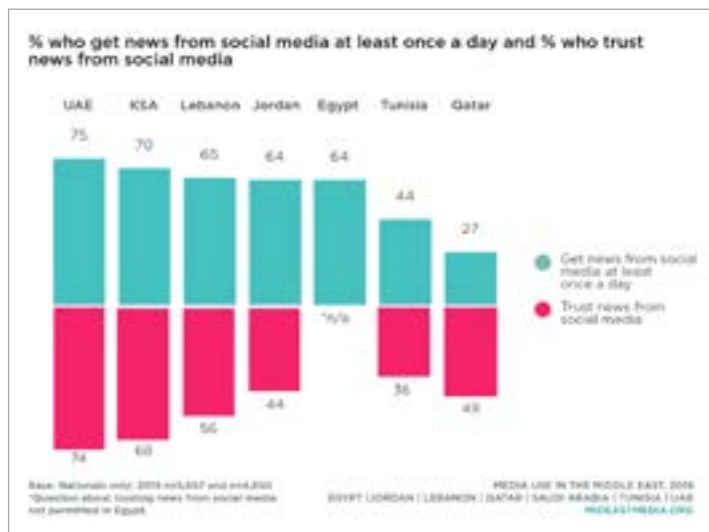
More nationals get and share news on Facebook and WhatsApp than on any other social media platforms. Getting news is more common than sharing news on every major social media platform, and the greatest disparity is reported for YouTube.

When focusing only on users of each platform, Twitter and Facebook dominate when it comes to news with two-thirds of their users getting and half sharing news on each platform.

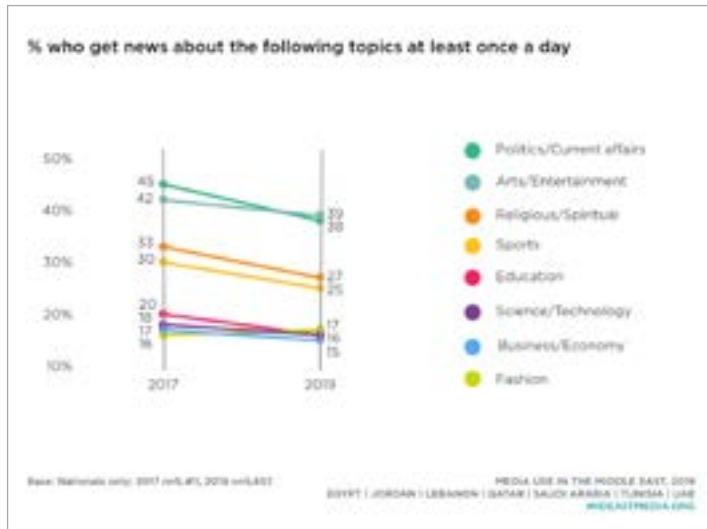


While most nationals get news online, fewer than half in each country say they posted or shared online about the news in the prior month. Since 2017, these rates dropped by half in Saudi Arabia and Qatar and dropped modestly in Jordan and Tunisia.

Just because nationals get news from social media doesn't mean they necessarily trust it. In the UAE, KSA, Jordan, Lebanon, and Egypt, about seven in 10 get news from social media every day. Emiratis and Saudis, however, are the only nationalities who both use and trust social media for news at similar rates, figures that have risen significantly since 2017.



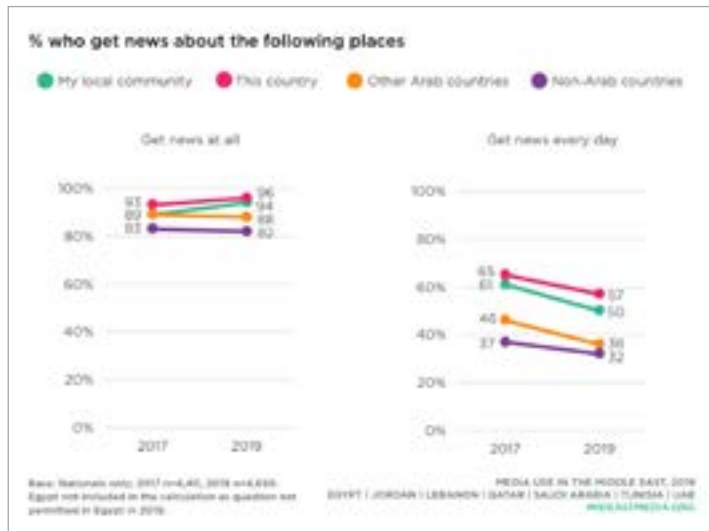
News topics



While daily consumption of all types of news has declined since 2017, more nationals, four in 10, get news about politics and arts and entertainment every day than other types of news. One-quarter of nationals get sports and religious news every day; news about science and technology, business and economy, and fashion are less popular.

More likely than women, men get daily news about politics and current affairs, sports, and business (political and current affairs: 43% men, 32% women; sports: 38% men, 12% women; business/economy: 18% men, 12% women), while women more likely lend daily attention to arts and entertainment, fashion, and religious/spiritual news (arts/entertainment: 37% men, 41% women; fashion: 12% men, 23% women; religious/spiritual: 25% men, 29% women). For many news topics, however, gender differences are not drastic.

Older nationals are more likely than those younger to get news every day about politics and current affairs and religious/spiritual topics, while arts and entertainment coverage is more popular among young nationals (political/current affairs: 26% 18-24 year-olds, 36% 25-34 year-olds, 43% 35-44 year-olds, 47% 45+ year-olds; religious/spiritual: 19% 18-24 year-olds, 26% 25-34 year-olds, 28% 35-44 year-olds, 36% 45+ year-olds; arts and entertainment: 47% 18-24 year-olds, 43% 25-34 year-olds, 36% 35-44 year-olds, 28% 45+ year-olds).

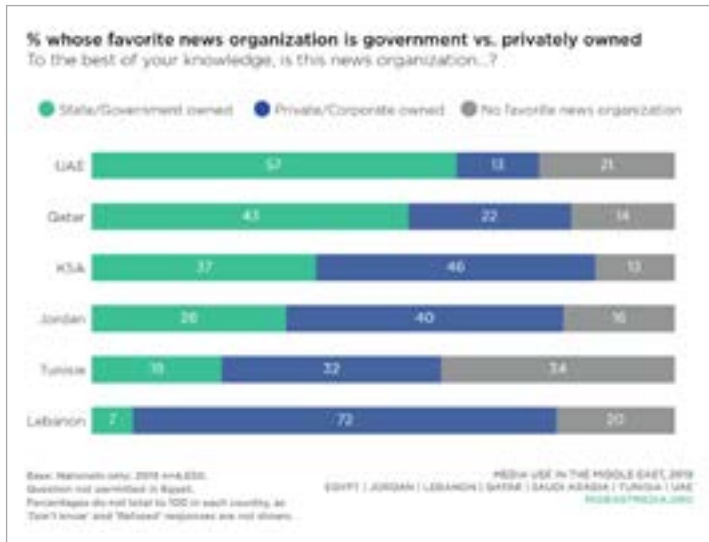


More nationals get local and national news every day than regional and international news. However, the proportion of nationals who get news about each locale every day dropped five to 10 percentage points across countries since 2017.

Far more nationals in older age groups get news every day than do younger nationals, regardless of the geographic focus of the news (local community: 40% 18-24 year-olds, 48% 25-34 year-olds, 55% 35-44 year-olds, 60% 45+ year-olds; this country: 44%, 55%, 62%, 68%; other Arab countries: 25%, 33%, 41%, 39%, outside the Arab region: 22%, 31%, 36%, 39%).

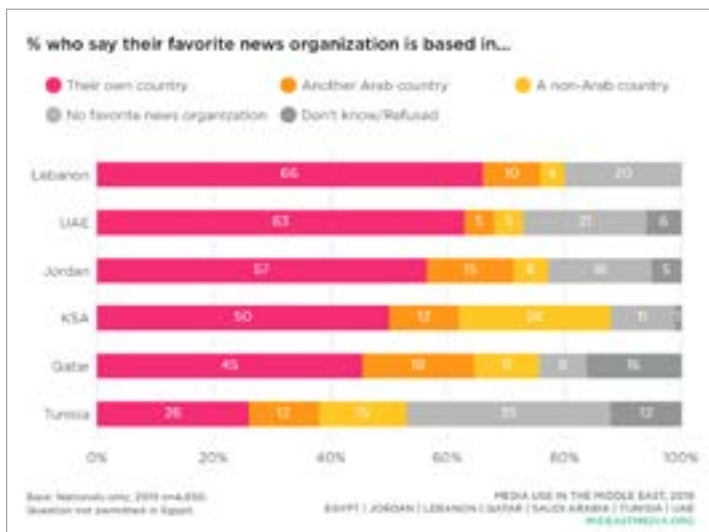
Interestingly, nationals with less education are more likely than those with a college education or higher to follow news about their local community and country. Nationals of all education levels follow global news at similar rates (my local community: 62% primary or less, 61% intermediate, 48% secondary, 48% university or higher; this country: 66%, 64%, 56%, 55%; other Arab countries: 45%, 42%, 35%, 34%; outside the Arab region: 35%, 34%, 31%, 32%).

Preferred news outlets



Respondents answered several questions about their favorite news organization. Emiratis and Qataris more likely prefer a news outlet that is government owned rather than privately owned. More common in all other countries, however, are favorite news organizations being privately owned, including three-quarters of Lebanese. A third of Tunisians do not have a favorite news organization. The question was not permitted by officials in Egypt.

Half to two-thirds of nationals in every country except Tunisia say their favorite news organization is based in their own country. Tunisians are more evenly split as to whether their favorite news organization is based inside or outside of their country.





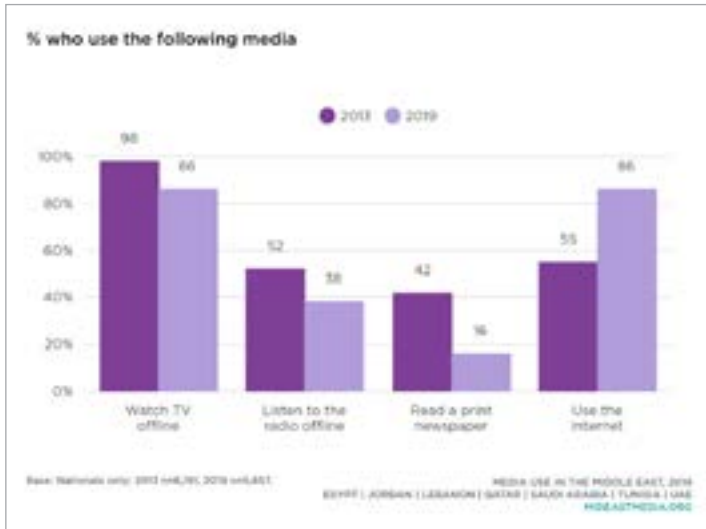
MEDIA USE BY PLATFORM



In this chapter

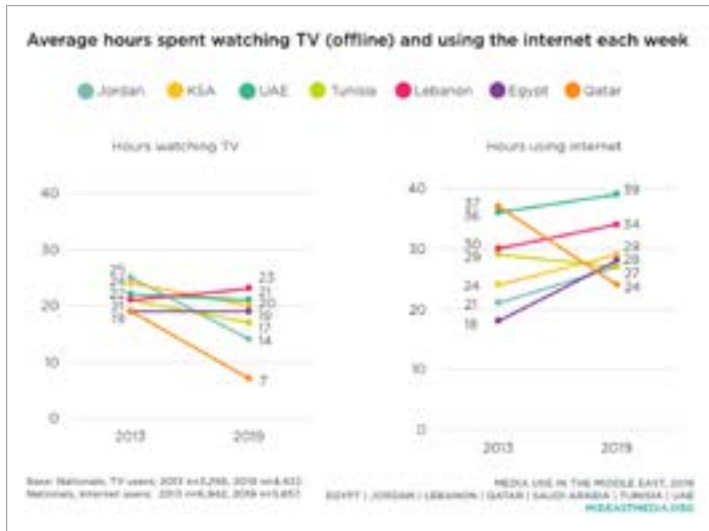
- Use of media online and offline
- Language preferences
- Online streaming services and podcasts
- Exercise and sports

Use of media online and offline



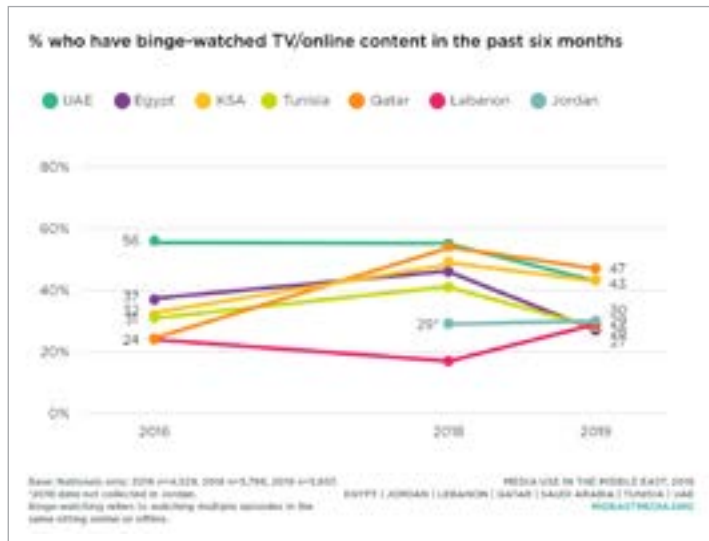
Compared to 2013, far more Arab nationals in 2019 use the internet, and nationals in some countries are spending more time online, possibly cutting into their use of offline media, including TV, radio, and print newspapers. Use of traditional media has declined in all surveyed countries. The percentage of nationals who watch TV fell most sharply in Qatar and Jordan from 2013 to 2019 (down 26 and 22 percentage points, respectively).

Since 2013, print newspaper readership declined by more than 50 percentage points in Qatar and the UAE and by more than 30 points in Tunisia and Jordan (55 points in Qatar, 53 points in UAE, 34 points in Tunisia, 33 points in Jordan). Although newspaper readership declined by 15 points in Saudi Arabia, 44% of Saudis still read a print newspaper. Radio use increased by 10 percentage points in Egypt from 2013 to 2019.



Overall, nationals in the region spend more time each week online than watching TV (30 hours vs. 19 hours, on average, among users of each medium). This disparity is seen in all countries surveyed. Moreover, time spent watching TV has declined since 2013 in most countries, while the time spent online has increased in all countries except Qatar.

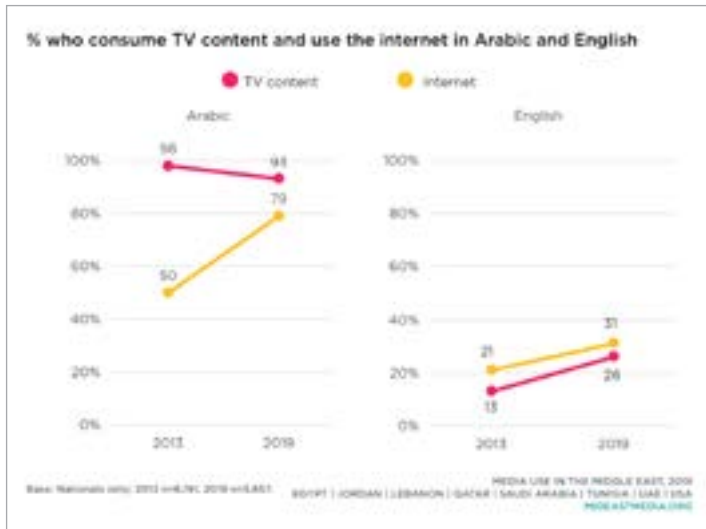
Women are more likely than men to watch TV and spend more time doing so on average (watch TV offline: 90% women vs. 83% men; hours watching TV offline each week: 20 hours women vs. 17 hours men). The oldest nationals (45+) are more likely to watch TV than the youngest group (18-24) and report spending more time doing so (watch TV offline: 90% 45+ year-olds vs. 83% 18-24 year-olds; hours watching TV offline each week: 22 hours 45+ year-olds vs. 17 hours 18-24 year-olds). Comparatively, men and younger nationals spend more time online each week than their counterparts (gender: 31 hours men vs. 28 hours women; age: 36 hours 18-24 year-olds vs. 21 hours 45+ year-olds).



Binge-watching has not taken hold in Arab countries in this study, at least compared to binge-watching frequency reported in other parts of the world. Asked if they had watched two or more episodes of the same TV/online program in one sitting in the prior six months, about one-quarter to one-half of Arab nationals report binge-watching—ranging from 27% in Egypt to 47% in Qatar—figures largely unchanged from 2016. In comparison, Limelight Networks’ State of Online Video 2019 survey reported a binge-watching rate of 80% among Americans.

Women and younger nationals binge-watch at slightly higher rates than their male and older counterparts (gender: 39% women vs. 26% men; age: 39% 18-24 year-olds, 34% 25-34 year-olds, 28% 35-44 year-olds, 26% 45+ year-olds). Non-nationals—Western expats in particular—are far more likely than Arab nationals to binge-watch TV/online series, perhaps to watch content from their own countries (65% Western expats, 52% Asian expats vs. 36% Arab expats, 32% Nationals).

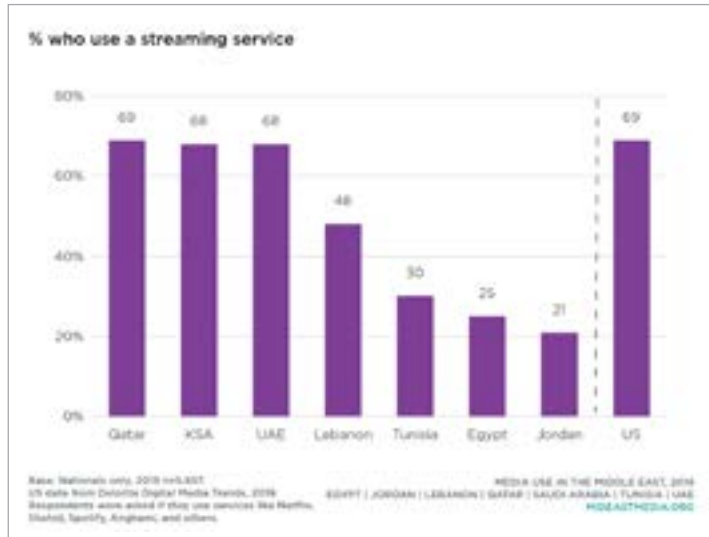
Language preferences



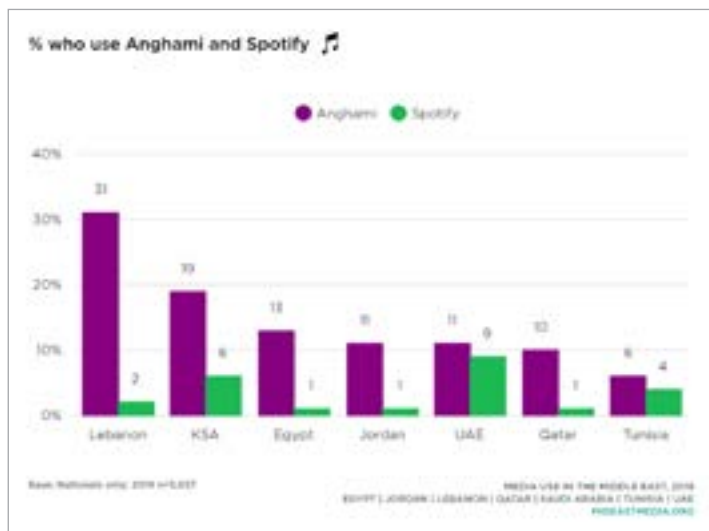
Arabic is by far the preferred language for TV and internet content, with at least eight in 10 nationals using Arabic for both. In comparison, just three in 10 use the internet and one-quarter watch TV content in English, although this represents an increase since 2013 of 10 and 13 percentage points, respectively.

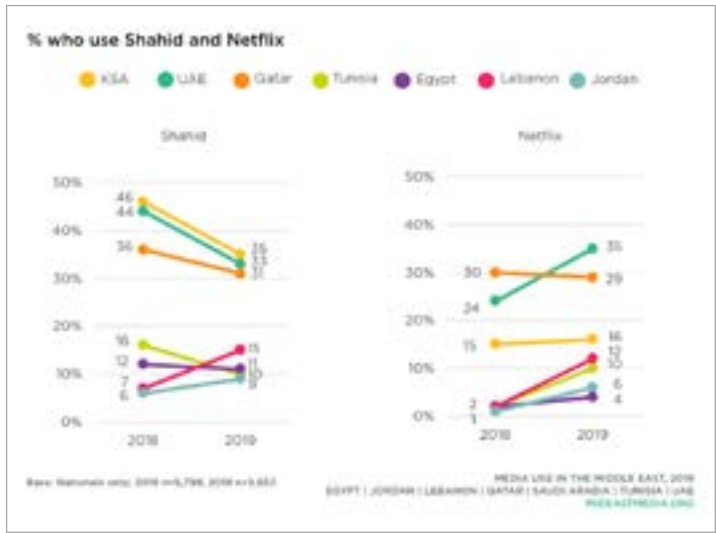
Men are more likely than women to watch TV and use the internet in English (TV: 28% men vs. 24% women, internet: 33% men vs. 28% women). Consuming English content on TV and online are more common among younger respondents (TV: 34% 18-24 year-olds, 31% 25-34 year-olds, 25% 35-44 year-olds, 14% 45+ year-olds; internet: 43% 18-24 year-olds, 38% 25-34 year-olds, 27% 35-44 year-olds, 13% 45+ year-olds). Viewing in English also increases with education (TV: 1% primary education or less, 13% intermediate, 27% secondary, 37% university or higher; internet: 2% primary education or less, 12% intermediate, 31% secondary, 46% university or higher).

Online streaming services and podcasts



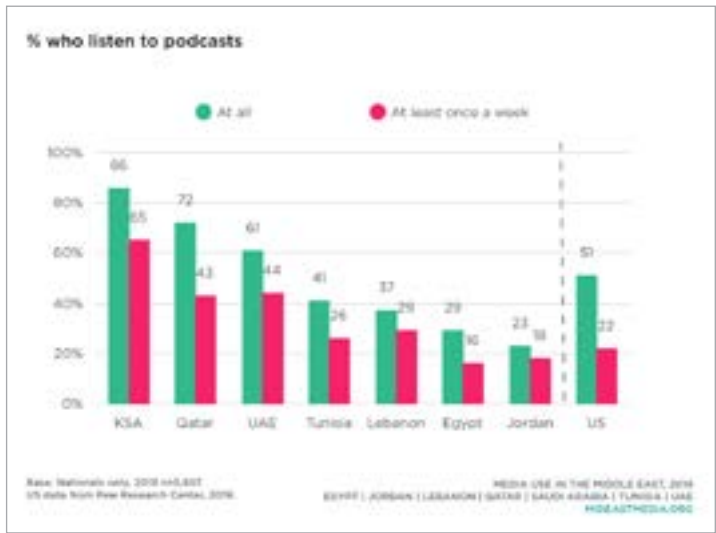
Streaming services are gaining popularity in the Arab countries in this study. Two-thirds of Qataris, Saudis, and Emiratis report using a streaming service (like Shahid, Anghami, and Netflix, or others), a figure similar to that in the U.S. (Deloitte, 2019). These services are less common, however, in other Arab countries. Shahid, Anghami, and Netflix are the most popular streaming services (Anghami offers music streaming; the other two are video entertainment portals). Shahid and Netflix are used by a greater proportion of nationals in the UAE and Qatar than in other countries. Shahid is most popular in Saudi Arabia, while Anghami is more common among nationals in Lebanon than elsewhere.

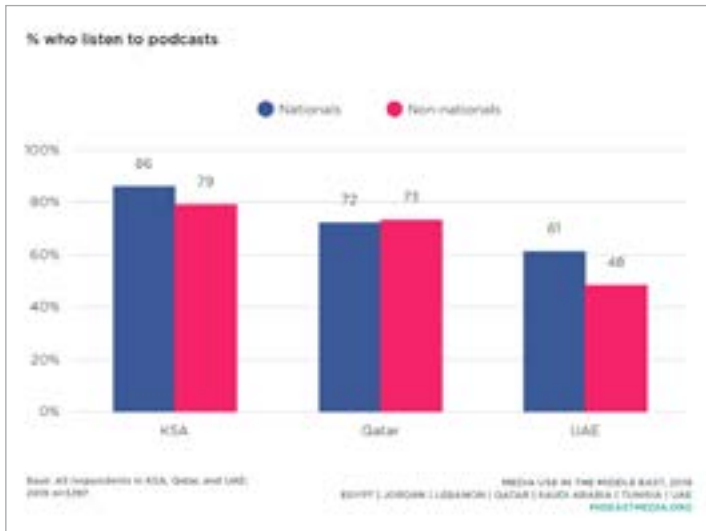




Compared to 2018, fewer nationals in the Arab Gulf countries use Shahid, while Netflix is more popular among Emiratis now than in 2018. Lebanese have increased their use of both of these streaming services.

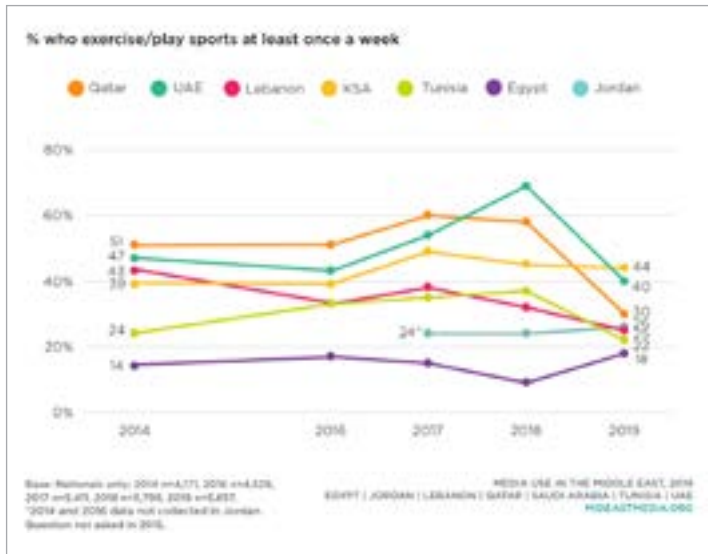
Podcast use varies widely by country. Two-thirds of Saudis listen to podcasts weekly, compared to less than two in 10 Egyptians and Jordanians. Podcasts are more popular in the Arab region than in the U.S. Weekly podcast listenership is higher in five of the Arab countries in this study than in the U.S. (U.S.: 22%, Pew Research Center, 2019).





More non-nationals than nationals listen to podcasts weekly, especially Western expats (60% Western expats vs. 38% Asian expats, 35% Arab expats, 30% Nationals).

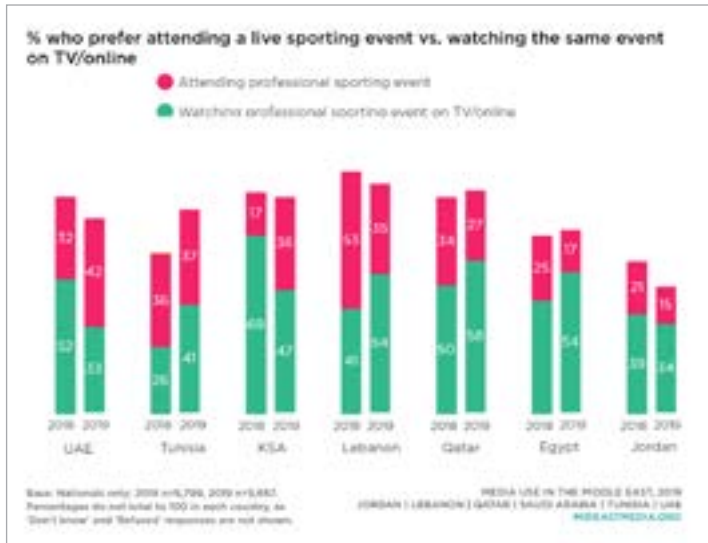
Exercise and sports



Exercising or playing sports at least once a week is routine for less than half of nationals surveyed, from a high of four in 10 in Saudi Arabia and the UAE to a low of two in 10 in Egypt and Tunisia. On average, nationals who exercise or play sports average about seven hours per week, with little variation by country (Jordan: 9 hours, KSA: 9 hours, Tunisia: 8 hours, UAE: 8 hours, Lebanon: 8 hours, Egypt: 7 hours, Qatar: 7 hours).

Men are more than twice as likely as women to exercise or play sports weekly, and men who exercise spend slightly more time at it than women who do so (participate: 37% men vs. 17% women; average hours per week: 9 men vs. 7 women).

Weekly exercise and sports participation rates are higher in younger than older age groups (39% 18-24 year-olds, 34% 25-34 year-olds, 22% 35-44 year-olds, 10% 45+ year-olds). The average time spent exercising or playing sports per week, however, is fairly similar across age groups, among the active (9 hours 18-24 year-olds, 8 hours 25-34 year-olds, 7 hours 35-44 year-olds, 8 hours 45+ year-olds).



When given the choice of attending a nearby professional sporting event or watching it live on TV or digitally, the preference in all countries except the UAE is to watch the event on a screen rather than attend. Older respondents are even more likely to report a preference for watching on TV/online than attending (prefer to attend event: 39% 18-24 year-olds, 34% 25-34 year-olds, 24% 35-44 year-olds, 16% 45+ year-olds).



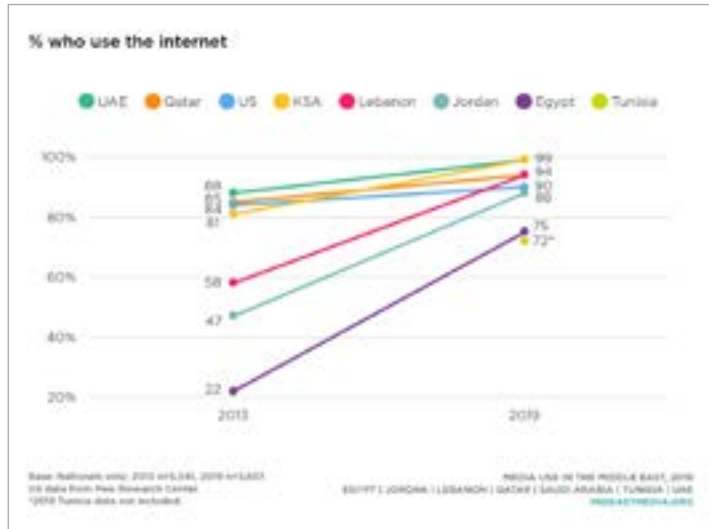
INTERNET USE



In this chapter

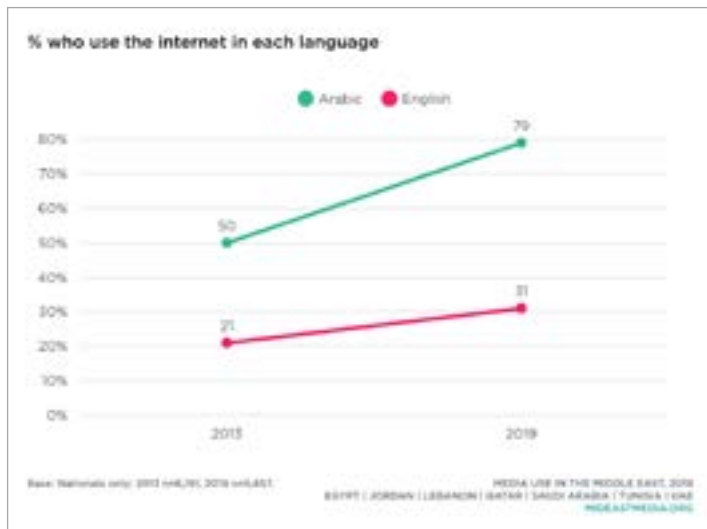
- Internet use and language preferences
- Devices used to access the internet
- Internet activities
- Connecting with others online
- Internet and politics

Internet use and language preferences



Since 2013, internet use has increased significantly to at or near saturation levels in all Arab countries in this study; in Jordan the rate approaches that in the U.S. and internet penetration surpasses the U.S. in the UAE, Saudi Arabia, Qatar, and Lebanon. The increase in internet users from 2013 to 2019 is particularly striking in Egypt (53 percentage points), Jordan (41 points), Lebanon (36 points), and Tunisia (27 points since 2014).

Younger and more highly-educated nationals continue to use the internet at higher rates than older and less-educated respondents, but these gaps are decreasing (age: 18-24 year-olds: 76% in 2013 vs. 97% in 2019, 25-34 year-olds: 68% vs. 94%, 35-44 year-olds: 45% vs. 86%, 45+ year-olds: 23% vs. 65%; education: primary or less: 5% in 2013 vs. 36% in 2019, intermediate: 35% vs. 73%, secondary: 64% vs. 91%, university or higher 83% vs. 96%).

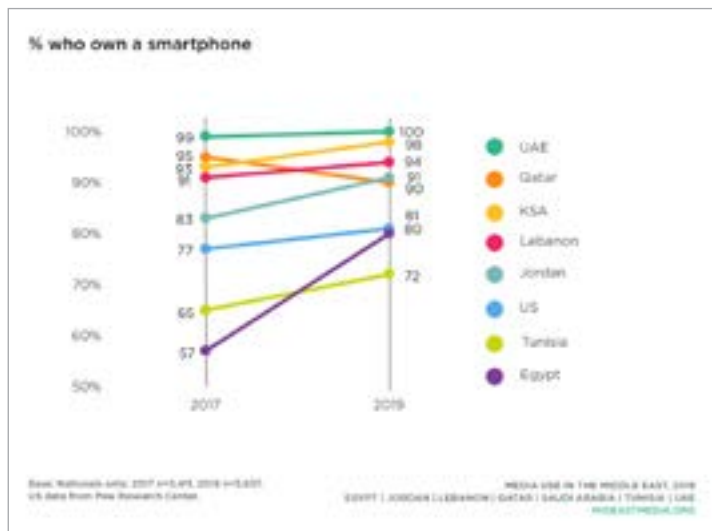


Use of the internet in Arabic tracks with overall internet use, while only about three in 10 nationals in 2019 say they use the internet in English. Additionally, while the percentages of nationals who use the internet and who use the internet in Arabic each increased by about 30 percentage points between 2013 and 2019, the share that uses the internet in English only increased by 10 points.

While almost all nationals access Arabic internet content, use of English online varies widely by country, from about half of nationals in Lebanon, Qatar, and the UAE, to one in five Egyptians. Notably, though, compared to 2013, use of English online increased substantially in Egypt, Saudi Arabia, Jordan, and the UAE (use English online: Qatar: 48% in 2013 vs. 48% in 2019; Lebanon: 46% vs. 51%, UAE: 22% vs. 46%, Tunisia: 22% vs. 24%, Jordan: 12% vs. 23%, KSA: 9% vs. 27%, Egypt: 5% vs. 21%).

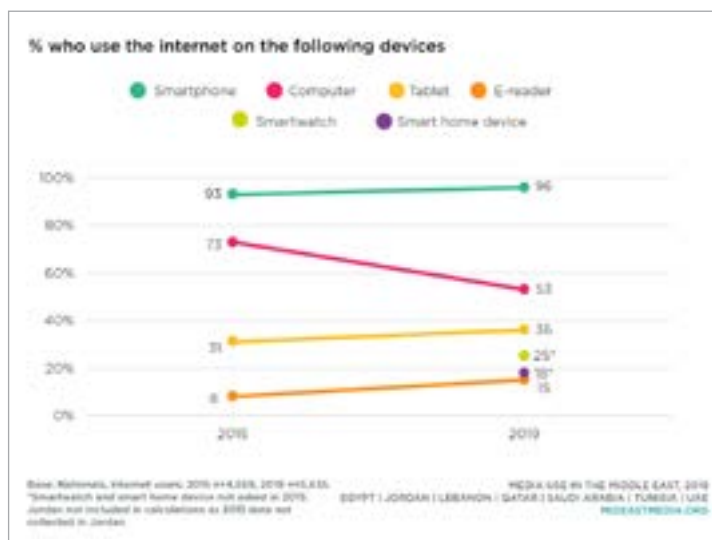
Men, younger nationals, and those with more education are more likely than their counterparts to use the internet in English (gender: 33% men vs. 28% women; age: 43% 18-24 year-olds, 38% 25-34 year-olds, 27% 35-44 year-olds, 13% 45+ year-olds; education: 2% primary or less, 12% intermediate, 31% secondary, 46% university or higher).

Devices used to access the internet



Smartphones are nearly ubiquitous among the Arab nationals surveyed. At least eight in 10 nationals in most countries—seven in 10 in Tunisia—own a smartphone. Smartphone ownership in all countries except Egypt and Tunisia exceeds that in the U.S. (Pew Research Center, 2019). Smartphone ownership in Egypt increased by 23 percentage points between 2017 and 2019.

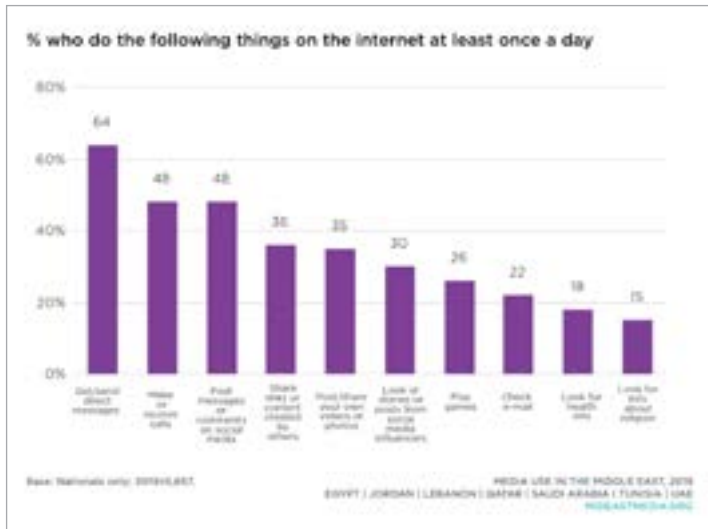
Younger and more highly-educated nationals are more likely to own a smartphone, but even seven in 10 of the oldest nationals (45+) and four in 10 of the least educated (primary or less) own one (age: 96% 18-24 year-olds, 94% 25-34 year-olds, 88% 35-44 year-olds vs. 69% 45+ year-olds; education: 42% primary or less vs. 78% intermediate, 92% secondary, 96% university or higher).



It is not surprising, then, that smartphones are the device of choice to access the internet among nearly all internet users. All other devices are used comparatively less to connect to the internet, including a sharp decline from 2015 to 2019 in accessing the internet on a computer (20 percentage point decline).

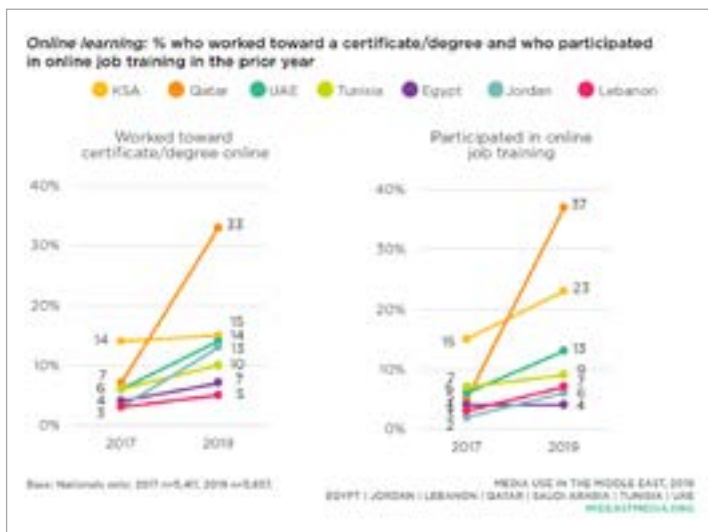
Smartwatches and smart home devices are gaining popularity, especially among those under 35 and those with at least a secondary education (use smartwatch: age: 22% 18-24 year-olds, 24% 25-34 year-olds, 14% 35-44 year-olds, 10% 45+ year-olds; education: 7% primary or less, 8% intermediate, 18% secondary, 23% university or higher; smart home device use: age: 14% 18-24 year-olds, 15% 25-34 year-olds, 12% 35-44 year-olds, 12% 45+ year-olds; education: 12% primary or less, 7% intermediate, 13% secondary, 16% university or higher).

Internet activities

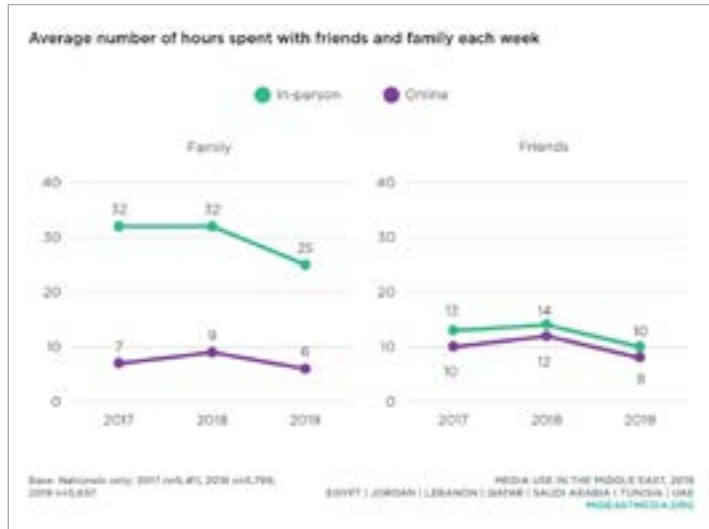


People use the internet for a variety of purposes but none more than direct messaging. Six in 10 nationals get or send direct messages every day. Additionally, half of nationals make or receive calls online every day and post on social media every day. Three in 10 nationals post or share their own photos and videos every day, and the same proportion share content created by others. One in three looks at posts from social media influencers every day. Sharing their own photos and videos on a daily basis is less common now than in 2015.

Less than 20% of nationals in each country have worked toward a degree online or participated in online job training in the prior year, with the exception of Qatar, where one-third of nationals say they participated in online training in the previous year, up from 7% who reported the same in 2017.

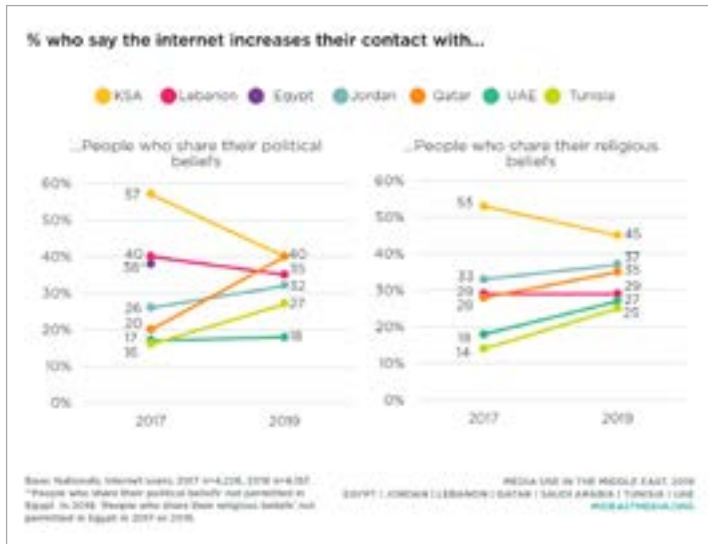


Connecting with others online



The time many nationals spend with others in-person and online has declined since 2017. On average, nationals spend four times as many hours in-person than online with family. Still, the average number of hours spent in-person with family each week decreased by seven hours since 2017. Nationals spend roughly as much time online as they do face-to-face with friends, but average weekly time with friends in person and online declined by three and four hours, respectively, compared to 2017.

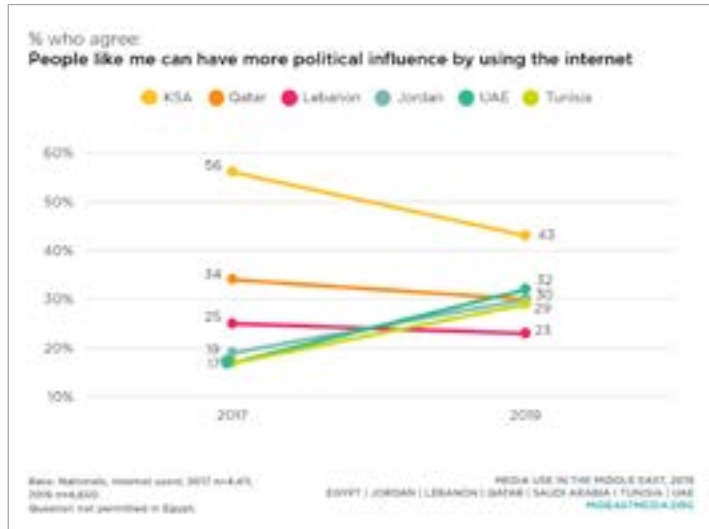
Internet and politics



For some users, the internet increases contact with people who share their political beliefs, especially in Saudi Arabia and Qatar where four in 10 say the internet increases their contact with politically like-minded people. However, this figure has fallen steeply in several countries since the Media Use in the Middle East study began in 2013; a decline of 20 percentage points or more in Saudi Arabia, UAE, and Jordan, and 14 points in Tunisia, for finding like-minded political contacts.

Several internet users also say the internet increases their contact with people who share their religious beliefs, including nearly half of Saudis and a third of Jordanians and Qataris. There has been an increase since 2017 in internet users in Qatar, Jordan, Tunisia, and the UAE who have more contact with religiously like-minded people online.

Men, more-highly educated internet users, and those who describe themselves as culturally progressive are more likely to say the internet connects them with politically like-minded others (gender: 36% men vs. 30% women; education: 22% primary or less, 27% intermediate, 34% secondary, 35% university or higher; cultural leaning: 39% progressive vs. 32% conservative).



A plurality of internet users says that the internet affords them political influence, ranging from four in 10 Saudis to one-fourth of Lebanese. This belief in online political efficacy declined sharply between 2013 and 2019—by 10 to 15 percentage points in most countries.

Belief in one’s personal political efficacy through the internet varies directly with increasing education and being culturally progressive as opposed to culturally conservative (education: 11% primary or less, 21% intermediate, 34% secondary, 33% university or higher; cultural leaning: 39% progressive vs. 29% conservative).



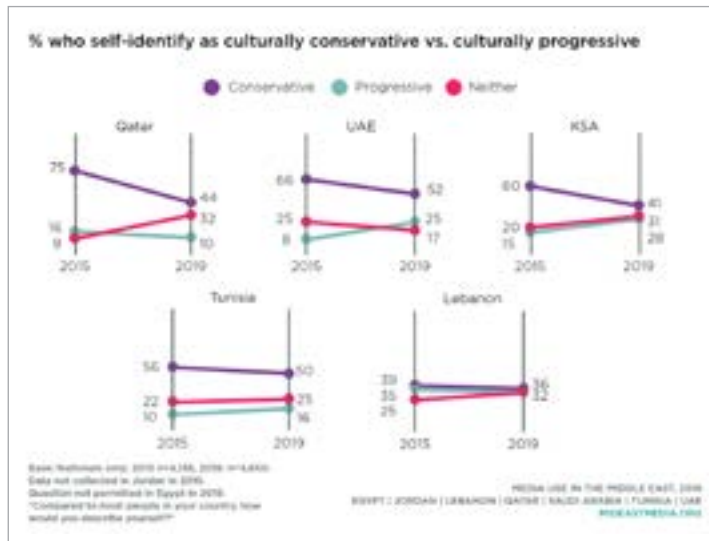
FREE SPEECH



In this chapter

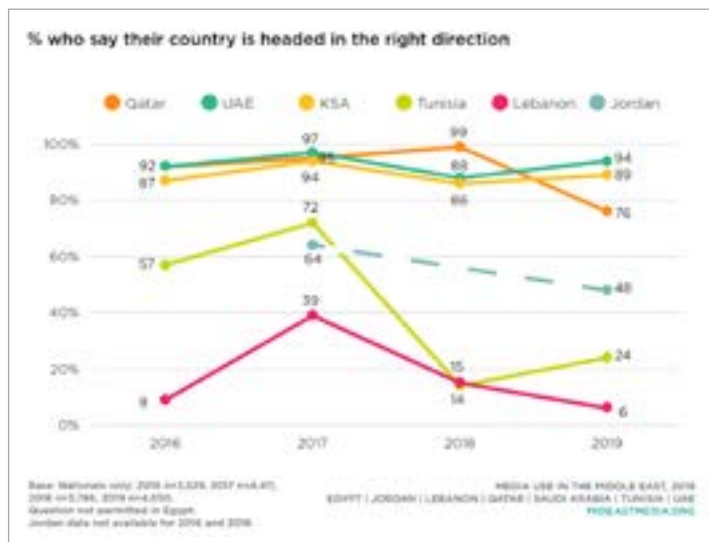
- Political attitudes
- Free speech online
- Government regulation of speech
- Internet regulation

Political attitudes

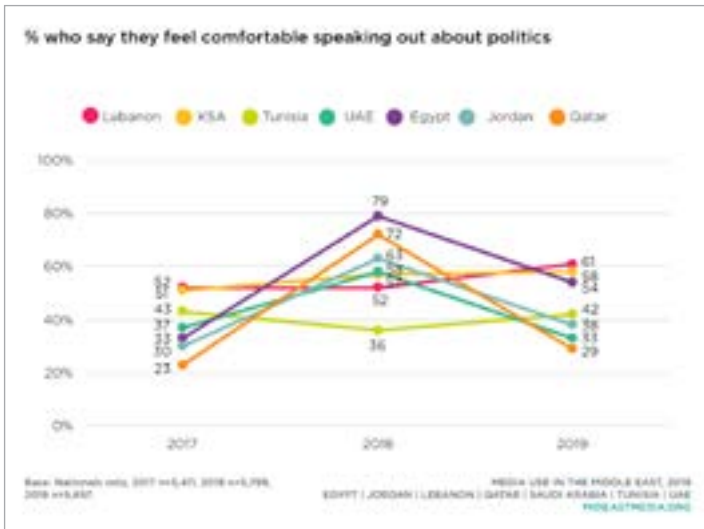


Attitudes toward free speech continue to evolve across the Arab countries surveyed in this study. Lebanese and Saudis report greater support for diverse cultural and political attitudes than do other nationals possibly because they also more likely believe it's safe for people to speak out about politics on the internet. In contrast, Qataris and Emiratis are much less likely now than in 2018 and compared to other nationals to say it's safe to express oneself online. The majority of questions in this chapter were not permitted by officials in Egypt.

Cultural attitudes since 2015 seem to be converging in some countries. The portion of nationals in each country self-identifying as culturally conservative has decreased since 2015, especially in Qatar and Saudi Arabia—where it dropped 31 and 19 percentage points, respectively—and now fewer than half of Qataris and Saudis describe themselves as culturally conservative. Simultaneously, the portion identifying as culturally progressive rose in every country except Qatar, where the group choosing neither conservative nor progressive nearly quadrupled. Lebanon is evenly split on this measure; one-third of Lebanese self-identify with each conservative, progressive, and neutral attitudes.

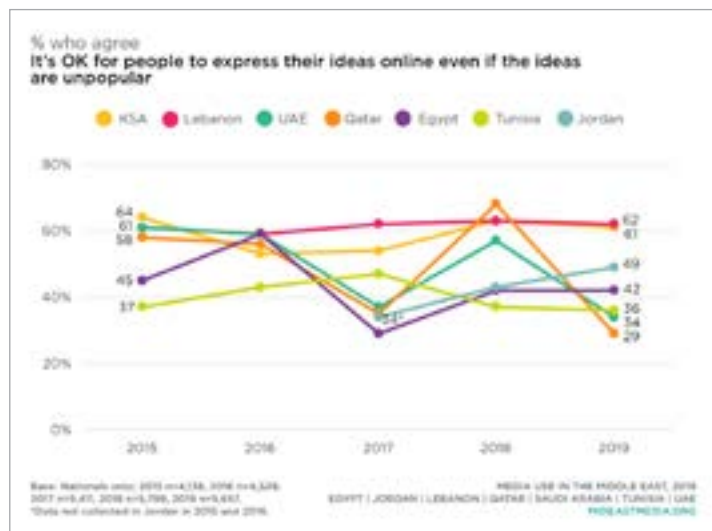


Arab nationals in some countries report less agreement on the trajectory of their countries. Significant majorities of Qataris, Emiratis, and Saudis say their country is headed in the right direction, though in Qatar the figure has fallen by 23 percentage points, to 76%, since 2018. Conversely, in Jordan, Tunisia, and Lebanon fewer than half of nationals say their country is moving in the right direction. Only 6% of Lebanese said their country is going in the right direction, and notably these 2019 data were collected in Lebanon before the sweeping demonstrations began in October.



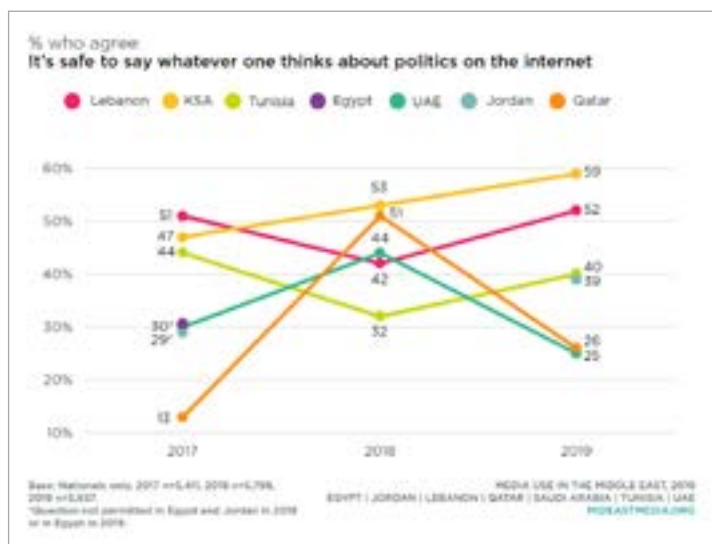
Between three and six in 10 nationals across countries feel comfortable speaking out about politics—Lebanese, Saudis, and Egyptians report much higher rates than Qataris, Emiratis, and Tunisians. Having peaked in 2018, confidence in speaking about politics has tempered across the region, declining since 2018 in every country except Saudi Arabia, Lebanon, and Tunisia, where there was a very modest rise.

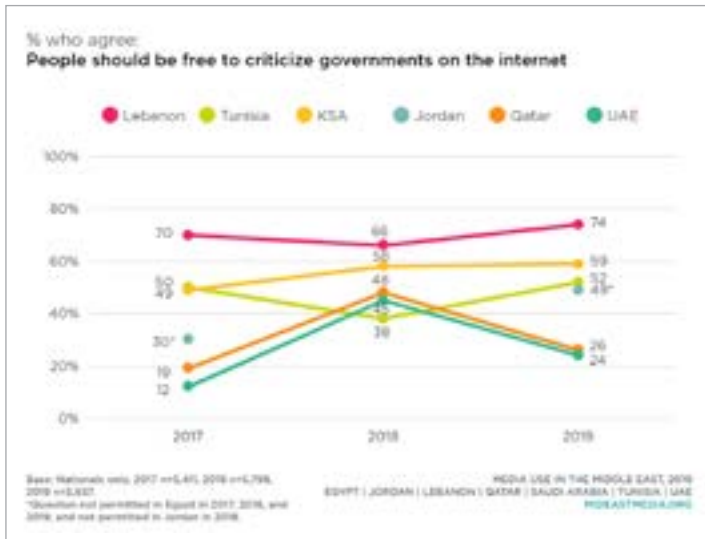
Free speech online



Between countries, nationals express marked differences in attitudes about protecting online speech. Most Lebanese and Saudis say people should be able to express ideas online even if the ideas are unpopular—changing little in the two countries over the past five years. Support for free speech online has been more variable in Qatar and the UAE, both recording a drop in agreement in 2017, a spike in 2018, and another drop in 2019.

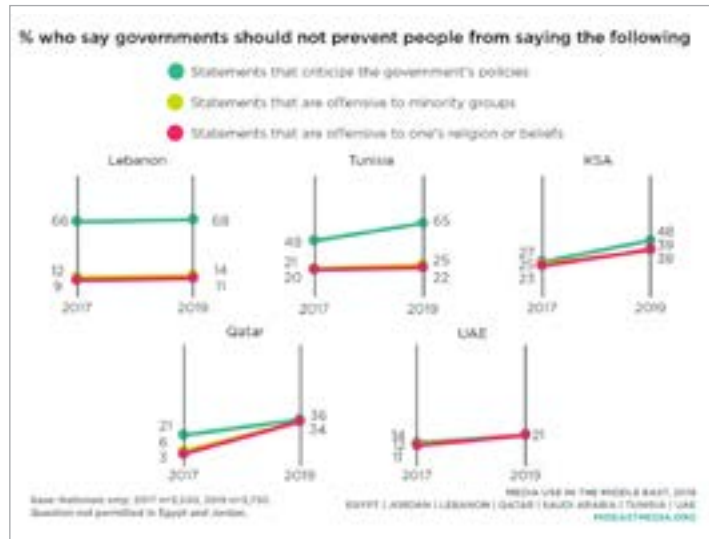
Similar patterns hold for the measure “It is safe to say whatever one thinks about politics on the internet.” Saudis and Lebanese, again, are among the most likely to agree, by percentages up six and 10 points from 2018, respectively. Such agreement is far less likely among Qataris or Emiratis, however.





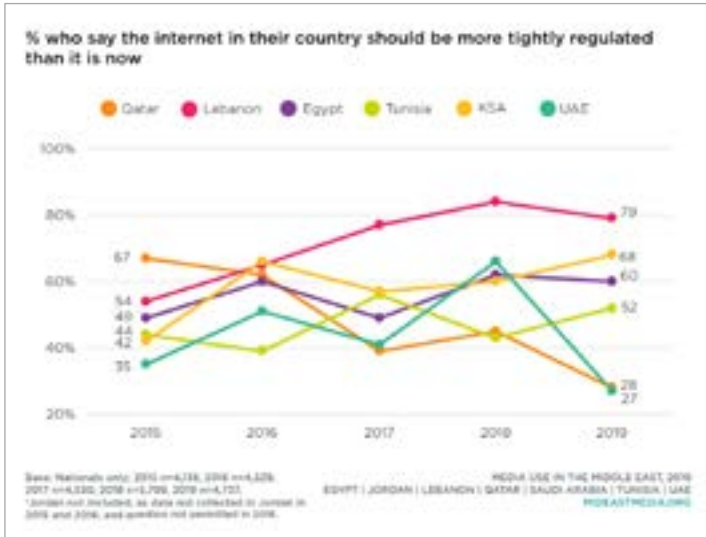
Majorities of nationals in all countries except the UAE and Qatar believe people should be able to criticize governments online; only one-quarter of Qataris and Emiratis agree. In Qatar, the figure fell from 48% in 2018.

Government regulation of speech



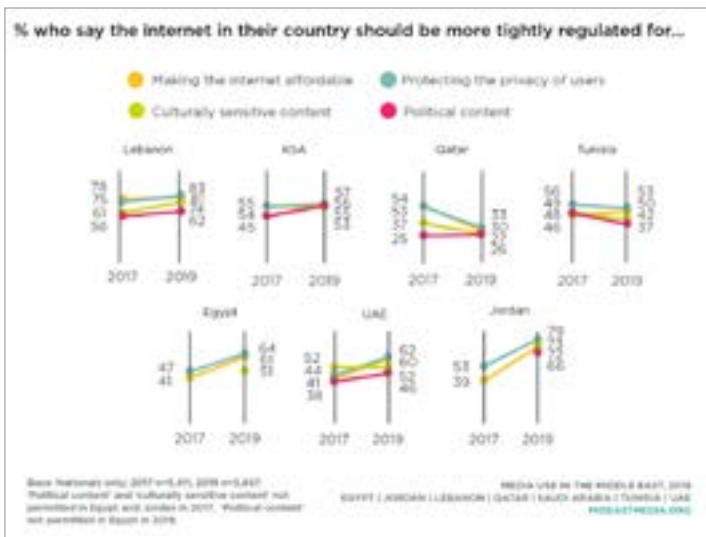
Nationals in every country continue to increasingly reject government abridgment of speech, even potentially controversial speech. More likely are Lebanese and Tunisians than other nationals to say governments shouldn't prevent criticism of governments. Emiratis and Qataris, however, are the most supportive of government regulating speech criticizing governmental policies as well as statements offensive to minorities or religions.

Internet regulation



Majorities of nationals in most countries want the internet in their country to be more regulated: Lebanon (79%), Jordan (75%), KSA (68%), Egypt (60%), and Tunisia (52%). Qatar and the UAE, however, saw a sharp decline in support for greater internet regulation to only one in four (28% Qatar, 27% UAE).

We learn more about what internet regulation means to many nationals in different countries by asking what specific regulations they want, such as making the internet more affordable, protecting user privacy, and monitoring political and culturally sensitive content. Qatar stands out on this measure, as less than a third of Qataris support any specific internet regulations, especially regulation of political and cultural content. Support for pro-social internet regulation—improving affordability and enhancing internet users’ privacy—has increased in in Egypt, Jordan, Lebanon, and the UAE since 2017 and decreased in Qatar in the same time period.





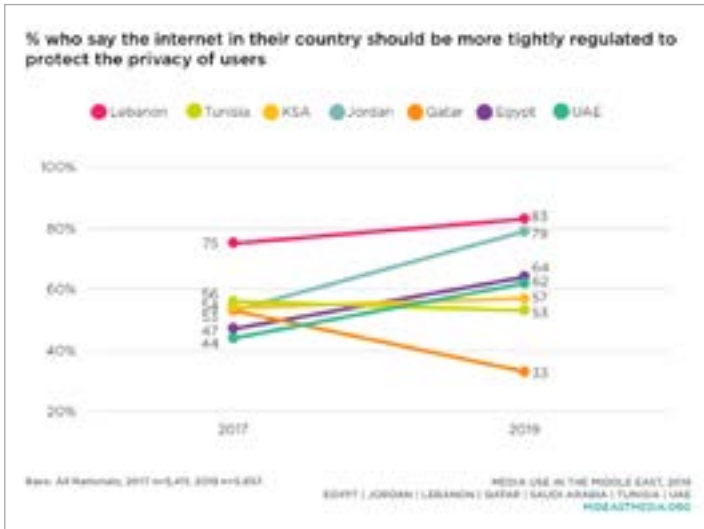
DIGITAL PRIVACY



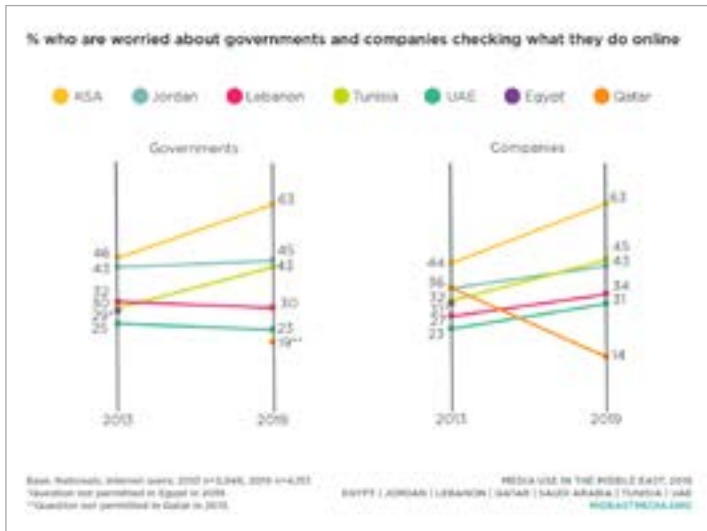
In this chapter

- Internet privacy concerns and online behaviors
- Sharing photos and videos online

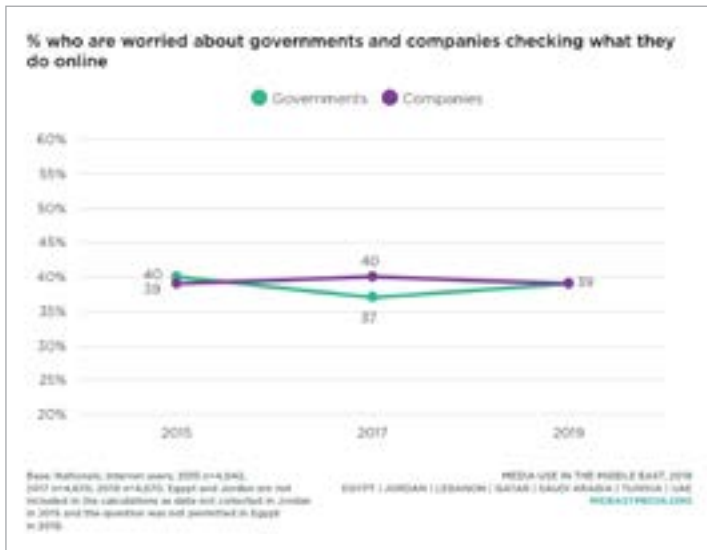
Internet privacy concerns and online behaviors

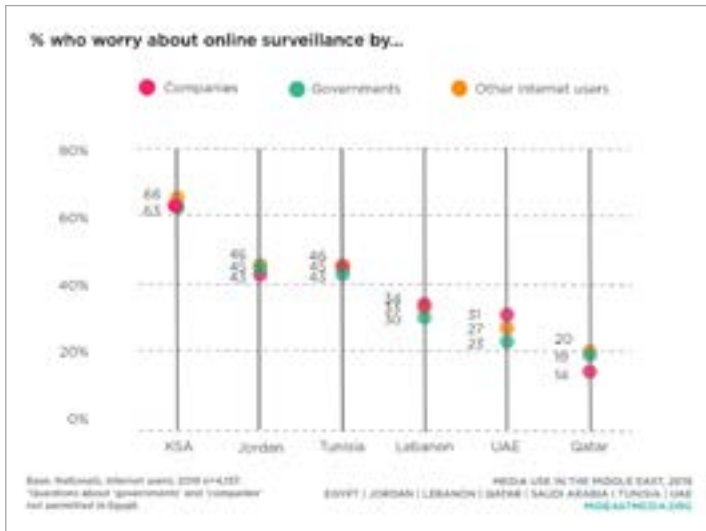


As people spend more time online—now 30 hours per week on average in most countries—concerns about digital privacy have also grown. Two-thirds of nationals say the internet in their country should be more tightly regulated to protect internet users’ privacy, up from 56% in 2017. Jordanians reported the largest increase in the desire for such regulation—up 26 percentage points since 2017—followed by Emiratis and Egyptians (up 18 and 17 points, respectively). Qatar, on the other hand, saw a 20-point drop in the share of nationals who want more regulation to protect internet users’ privacy.

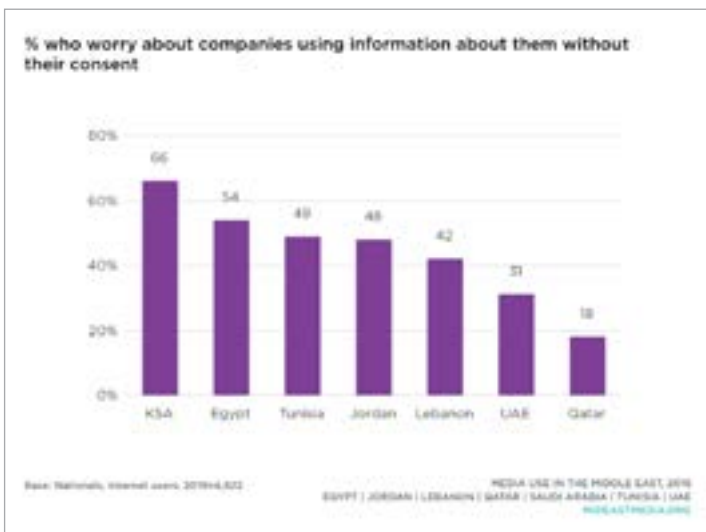


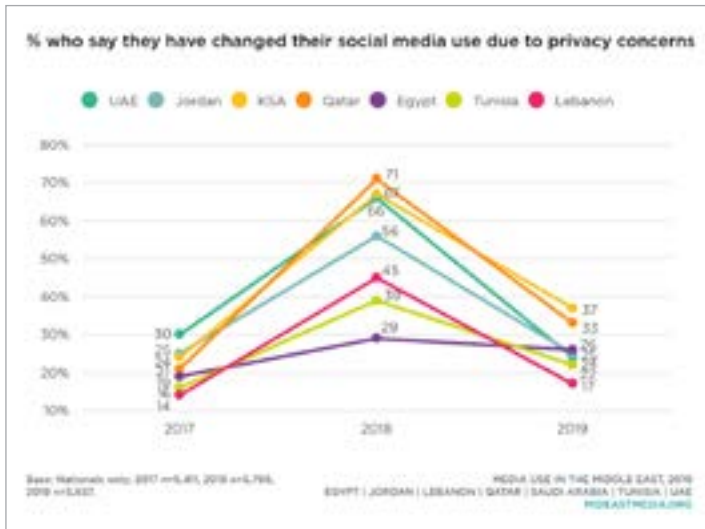
Additionally, concerns among internet users about online surveillance by governments and companies has increased since 2013. All countries except Qatar saw a sizable increase from 2013 to 2019 in concern about companies checking what they do online, while Saudi Arabia and Tunisia were the only two countries where fear of government surveillance increased significantly. This question was not permitted by authorities in Qatar in 2013 or by officials in Egypt 2019.





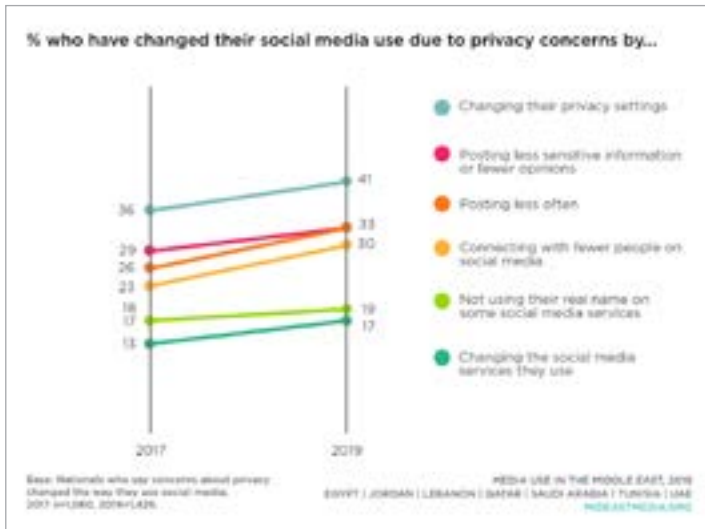
Internet users are just as worried about other internet users checking what they do online as they are about monitoring by companies and governments, and the former is a new question in 2019. The parity in concern about surveillance by governments, companies, and laypersons is consistent across countries. Additionally, on average, about half of internet users worry about companies using their personal information without their consent, ranging from one in five in Qatar to more than three in five in Saudi Arabia.





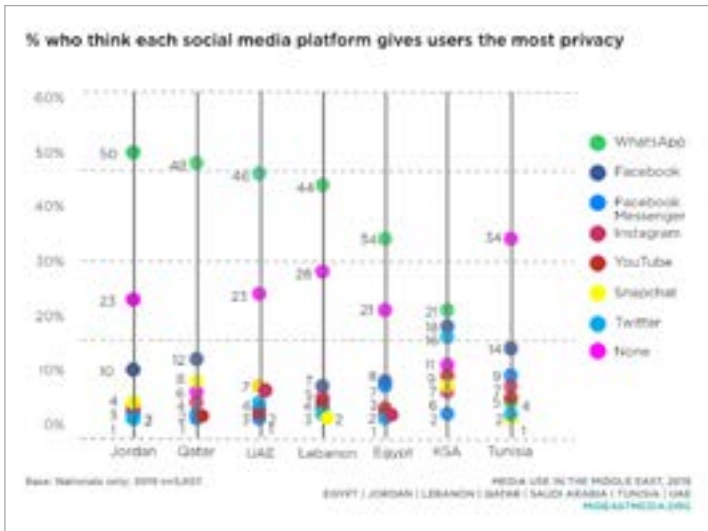
Privacy concerns may be spurring changes in digital behaviors. Between two and four in 10 nationals say they have changed their social media use due to privacy concerns. Behavior changes spiked from 2017 to 2018, and are now closer to, but still higher than the levels observed in 2017. Egypt is the only country that maintained the same percentage as 2018 saying they changed their social media behavior due to privacy concerns.

Internet users who worry about online surveillance by governments or companies are more likely than those who are not worried to change their social media use for privacy reasons (privacy concerns about governments checking have changed the way I use social media: 36% agree, among those worried vs. 20% among those not worried; companies checking: 37% among those worried vs. 18% among those not worried).



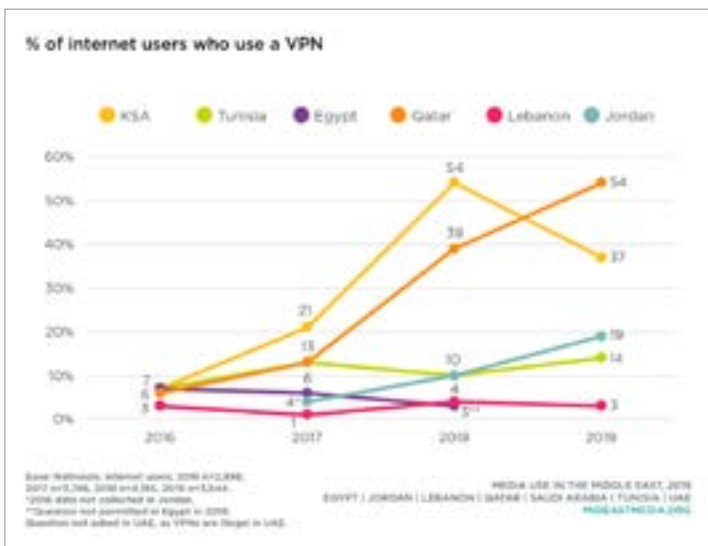
Internet users who said they changed social media behaviors for privacy reasons report a number of specific, corrective actions. Four in 10 have changed their privacy settings, three in 10 post less often or share less sensitive information, and nearly two in 10 have stopped using some services or stopped using their real name on certain social media platforms.

Younger nationals are more likely than older respondents to report changing their privacy settings (48% 18-24 year-olds, 44% 25-34 year-olds, 39% 35-44 year-olds, 27% 45+ year-olds, among those who have made changes). Older nationals, however, say they connect with fewer people on social media generally (24% 18-24 year-olds, 29% 25-34 year-olds, 33% 35-44 year-olds, 38% 45+ year-olds, among those who have made changes).



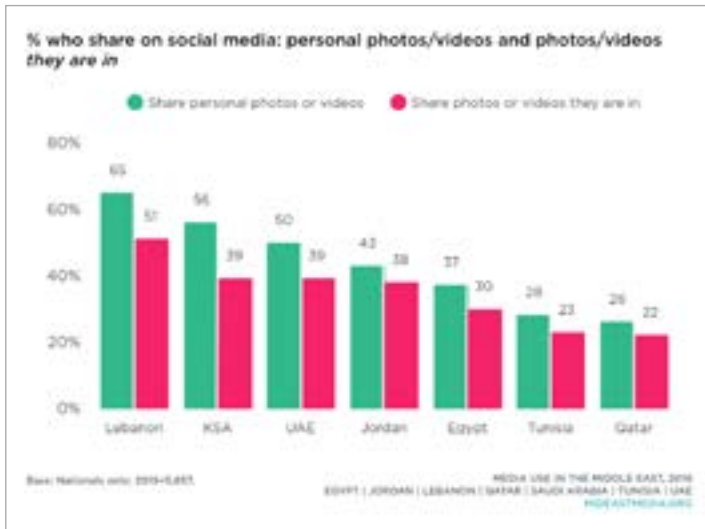
Thirty-two percent of nationals say WhatsApp is the platform affording the most privacy, far more than the percentages who named Facebook, Twitter, Instagram, or Snapchat as the most privacy-protective—and the margin is wide in most countries. Notably, nearly one in four (23%) nationals do not believe any social media platform provides privacy to users.

Increased VPN use is another way many Arab nationals increase privacy protection. While VPN use varies widely by country, VPN adoption rose in several countries in the last few years. Notably, more than half of Qataris now use a VPN, up dramatically since 2016. VPN use also grew in Jordan and Tunisia. This question was not asked in the UAE, where VPN use is illegal (and is prosecuted) and was not permitted by Egyptian authorities in 2019.



Those who worry about online surveillance by governments and companies are more likely to use a VPN than those who are not worried, which may suggest respondents don't only use VPNs to access otherwise unavailable entertainment content, but also to disrupt would-be surveillance (use a VPN: 21% among those worried vs. 15% among those not worried about government surveillance; 20% among those worried vs. 16% among those not worried about corporate surveillance).

Sharing photos and videos online



Still, privacy concerns have not obviated sharing potentially sensitive personal material. Half of nationals share personal photos and videos on social media—including ones they are in—ranging from three in 10 in Qatar and Tunisia to nearly seven in 10 in Lebanon.

Twice as many of the youngest respondents (18-24) share personal photos and videos on social media—including ones they are in—than the oldest cohort (61% 18-24 year-olds, 55% 25-34 year-olds, 47% 35-44 year-olds, 30% 45+ year-olds).



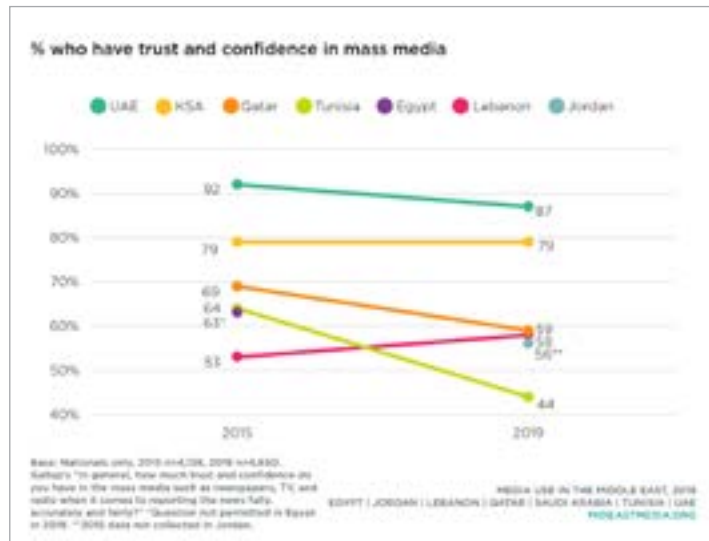
BIAS AND CREDIBILITY



In this chapter

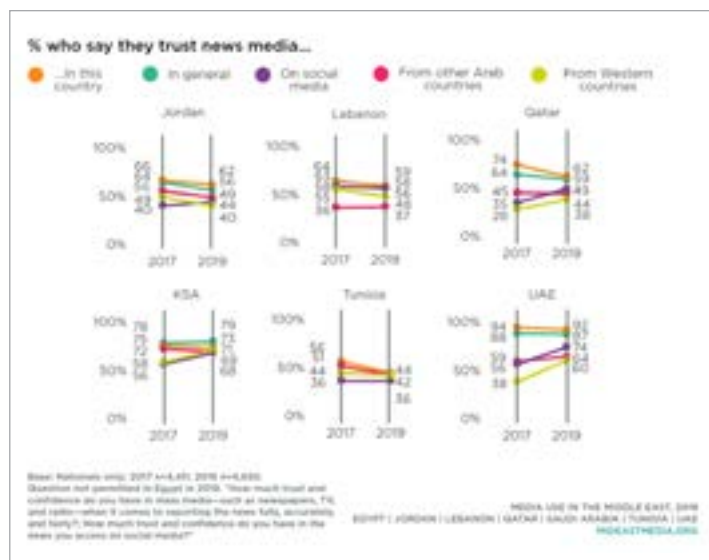
- Trust in mass media
- Media credibility and reporting news without interference
- Perceived bias in news reporting
- Perceived benefits of foreign news

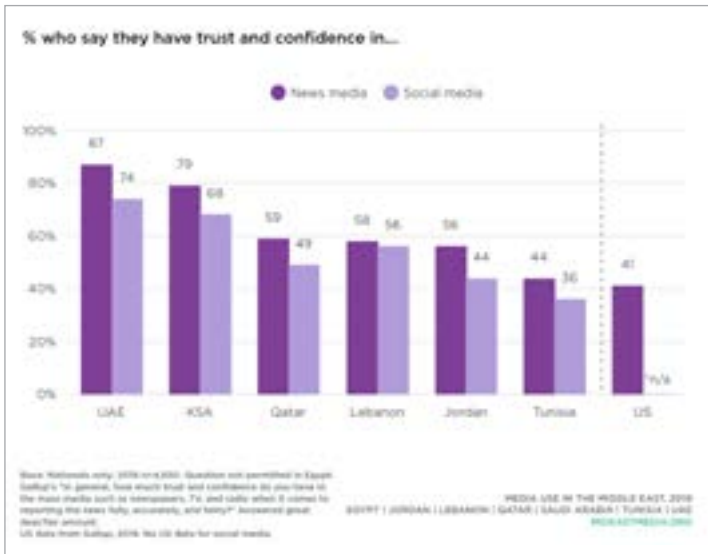
Trust in mass media



Trust in mass media to accurately report the news has been declining in most countries over the past five years. As in 2015, Emiratis and Saudis remain the nationals most likely to trust mass media. This trust, however, dropped most dramatically—by 20 percentage points—to fewer than half of Tunisians and by 10 points among Qataris in the same time period, from 2015 to 2019. This question was not permitted by officials in Egypt in 2019.

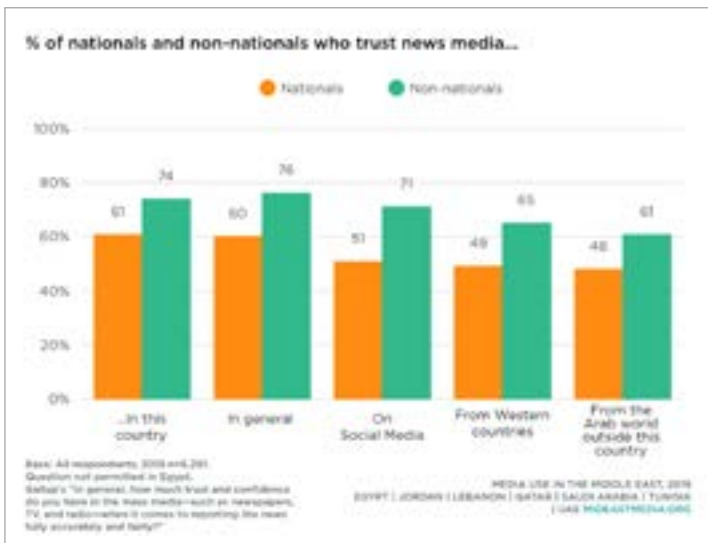
Nationals in all countries are more likely to trust mass media from their own country than media from other Arab or Western countries (61%, 48%, and 49%, respectively). Still, there are some interesting trends at the country level. The proportion of Qataris who say they trust media in Qatar dropped by 12 percentage points from 2017 to 2019, while the share of Qataris who trust Western mass media rose by 10 points in the same period. Additionally, in the UAE and Saudi Arabia, the percentage of nationals who trust Western mass media grew by 22 points and 13 points, respectively, while trust in mass media from their own countries remained stable. Tunisia saw a 12 point drop in trust in national media between 2017 and 2019, and now roughly the same percentage of Tunisians trusts each: national media, mass media from other Arab countries, and Western mass media.





More women respondents trust mass media than do men, including: mass media in general, mass media from their country, and mass media from other Arab countries (trust mass media: 62% women vs. 57% men; media from their country: 63% vs. 58%; media from the Arab world: 50% vs. 46%).

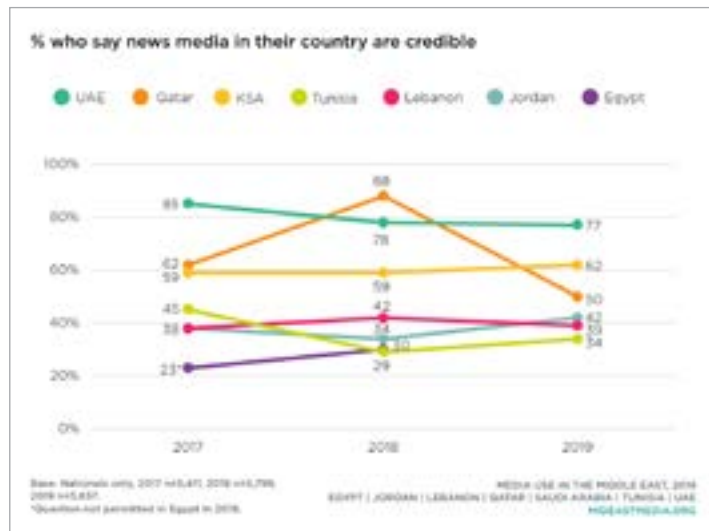
Those who describe themselves as culturally conservative are more likely than those who self-identify as culturally progressive to trust mass media, including: mass media generally, mass media from their own country, and mass media from other Arab countries (trust mass media: 65% conservative vs. 57% progressive; media from this country: 66% vs. 57%; media from the Arab world: 53% vs. 44%).



Percentages of nationals who trust news from social media vary by country, from a high of three-fourths in the UAE to a low of one-third in Tunisia. Notably, public trust in news from social media grew markedly between 2017 and 2019 in the UAE, Qatar, and Saudi Arabia (up 18 percentage points, 14 points, and 12 points, respectively).

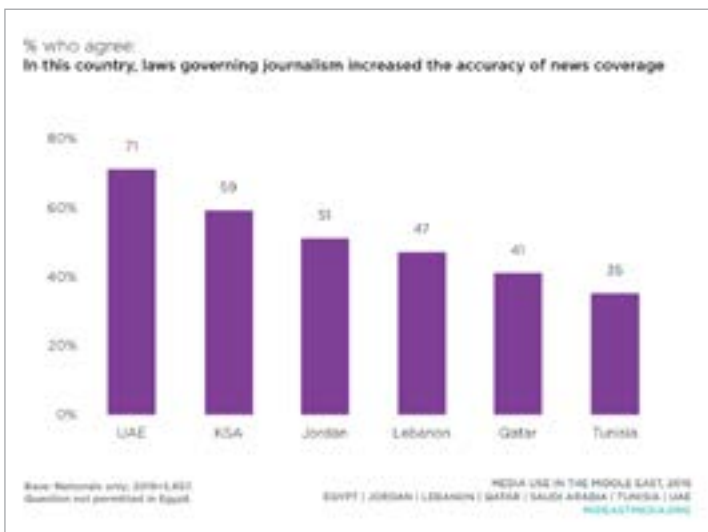
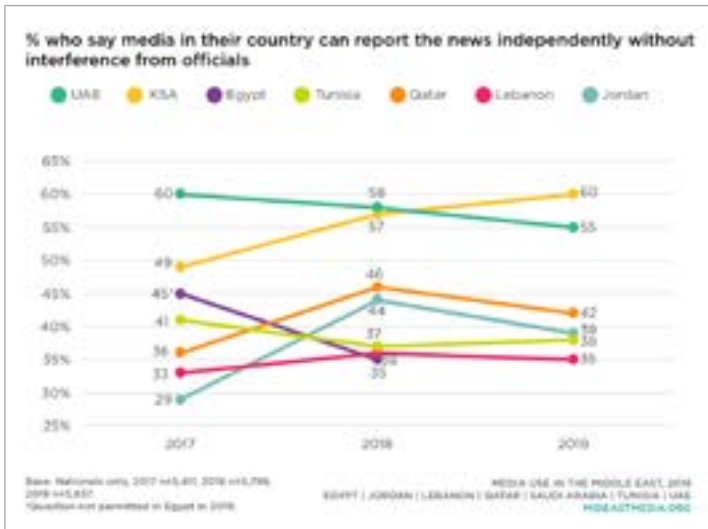
Nationals are more likely than non-nationals to trust any of the categories of mass media, and the widest gap, 20 percentage points, exists for news from social media. Non-nationals trust mass media from the country where they are living at a higher rate than do the nationals themselves, by 13 points across countries on average.

Media credibility and reporting news without interference



Nearly half of nationals overall say news media in their country are credible and that journalism laws in their country improve the accuracy of news coverage (45% and 48%, respectively). Four in 10 overall say media in their country can report news independently without interference from officials (43%). These questions were not permitted in Egypt in 2019.

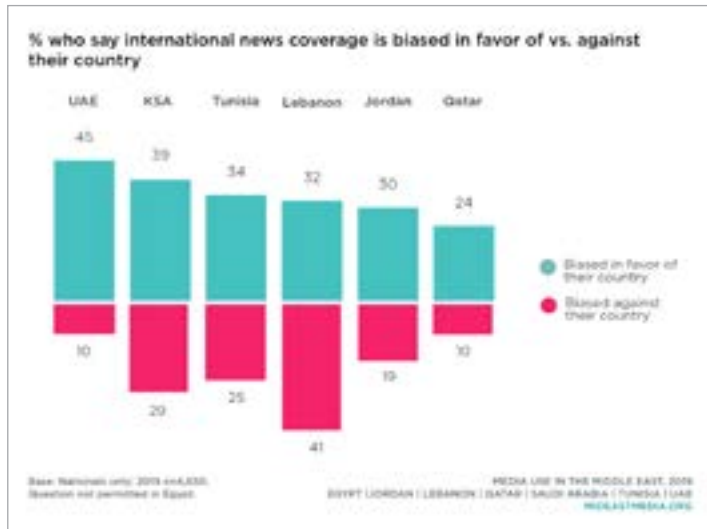
Perceptions of media credibility and independence vary widely by country. Nationals in Arab Gulf countries in the study are more likely than other nationals to say their country’s news media are credible (77% UAE, 62% KSA, 50% Qatar vs. 42% Jordan, 39% Lebanon, 34% Tunisia). Overall, perceptions of media credibility have not changed much over time, with the exception of Qatar, which saw a spike in perceived credibility from 2017 to 2018 (our first survey after the Saudi-led blockade of Qatar began) followed by a sharp decline in 2019.



Majorities of Saudis and Emiratis believe news media in their country can report news without interference from officials, whereas only minorities of nationals in the other countries surveyed say the same (60% KSA, 55% UAE vs. 42% Qatar, 39% Jordan, 38% Tunisia, 35% Lebanon). The percentage of nationals who believe news media can report without official interference rose in Saudi Arabia, Jordan, and Qatar (up 11 percentage points, 10 points, and 6 points, respectively).

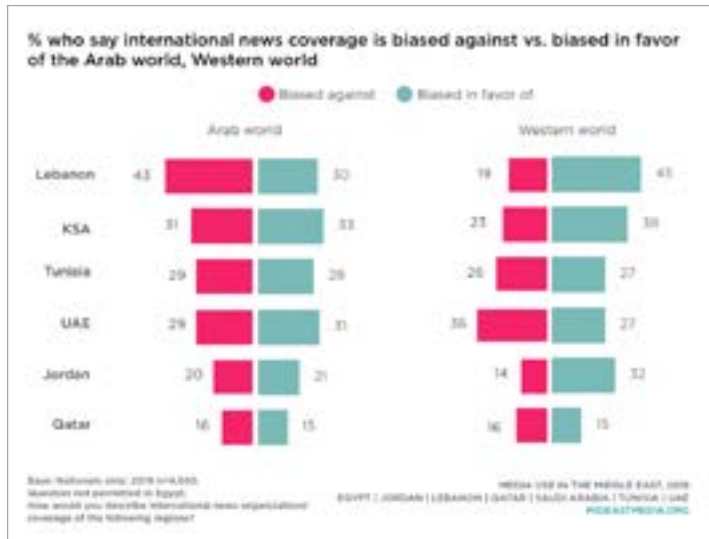
Seven in 10 Emiratis say laws governing journalism have made it better, as do six in 10 Saudis and half of Jordanians, while less than half of nationals in other countries agree (71% UAE, 59% KSA, 51% Jordan, 47% Lebanon, 41% Qatar, 35% Tunisia). The question was not permitted in Egypt. Compared to 2017, agreement with this statement increased in Jordan and Saudi Arabia but fell in Qatar (Jordan: 34% in 2017 vs. 51% in 2019; Saudi Arabia: 51% in 2017 vs. 59% in 2019; Qatar: 48% in 2017 vs. 41% in 2019).

Perceived bias in news reporting



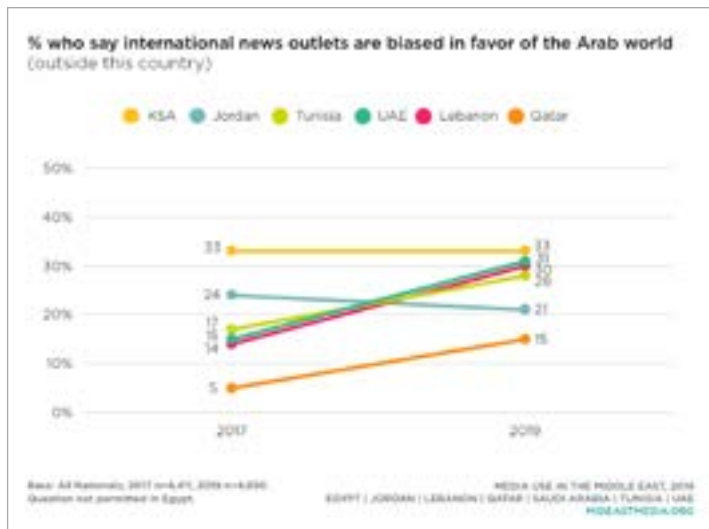
Nationals were asked about any bias by international news organizations either for or against their country, other Arab countries, and the Western world. Nearly half of Emiratis say international news coverage is biased in favor of their country, while only one-quarter of Qataris agree that coverage of Qatar carries a positive bias. Still, only one in 10 Emiratis and Qataris say news coverage is biased against their respective countries. Lebanese are not only the most likely to say international news coverage is biased against their country, but Lebanon is the only country where perceptions of negative international news bias are more common than positive ones. This question was not permitted by officials in Egypt.

In contrast to 2015, a greater proportion of Saudis in 2019 believe international news coverage is biased in favor of their country as opposed to against their country (biased in favor: 17% in 2015 vs. 39% in 2019, biased against: 38% in 2015 vs. 29% in 2019). Lebanese in 2019 are more likely to say international news coverage is biased toward Lebanon than in 2015 and slightly less likely to say such coverage demonstrates anti-Lebanon bias (biased in favor: 26% in 2015 vs. 32% in 2019; biased against: 48% in 2015 vs. 41% in 2019).

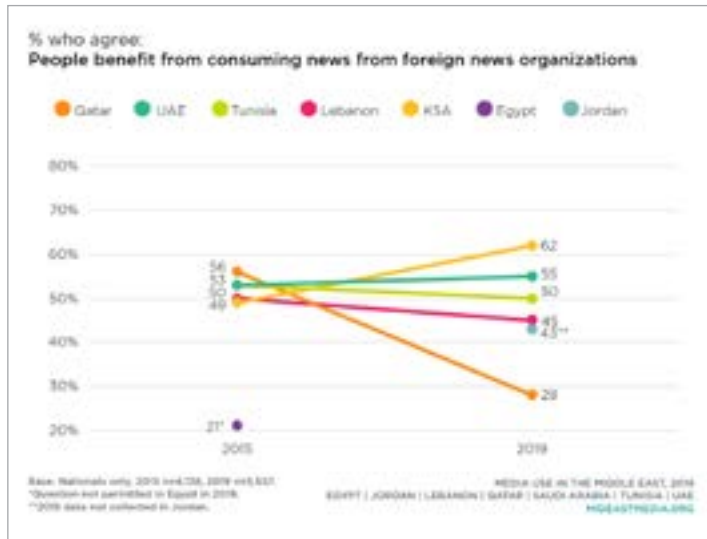


While Lebanese are the most likely to say international news coverage is biased against both their country and the Arab world, they are also more likely than other nationals to say coverage is biased toward Western countries. Compared to all other nationals, Qataris are least likely to perceive negative international news bias, whether it be against their country, against the Arab world, or against the Western world.

Compared to 2017, more Tunisians, Lebanese, Qataris, and Emiratis now believe international news outlets' coverage favors the Arab world.



Perceived benefits of foreign news



A robust number of nationals in most countries—four in 10 or more—say people benefit from consuming news from foreign news organizations. Of note, six in 10 Saudis perceive benefits to consuming foreign news, a figure that has increased since 2015 (49% in 2015 vs. 62% in 2019). The exception is Qatar, which has been confronted by fake news assaults from Saudi Arabia, the UAE, Egypt, and other countries; just 28% of Qataris see benefits to consuming foreign news, half of what that figure was in Qatar in 2015 (56% in 2015 vs. 28% in 2019).



SOCIAL MEDIA INFLUENCERS



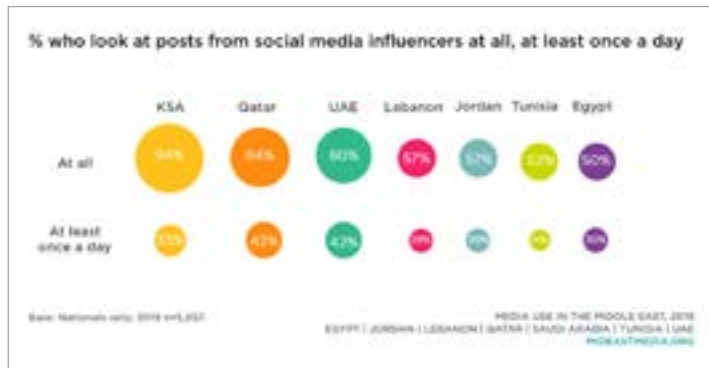
In this chapter

- Following social media influencers
- Interacting with social media influencers
- Getting news from social media influencers
- Notable social media influencers

“Social media influencers” are social media users who have established credibility in a certain industry or content type and have access to a wide audience. Influencers have a large enough following to spark conversations, drive engagement, set trends, inspire action, and change behavior.

The 2019 edition of *Media Use in the Middle East* explores the topic of social media influencers, including how and how often people engage with these individuals.

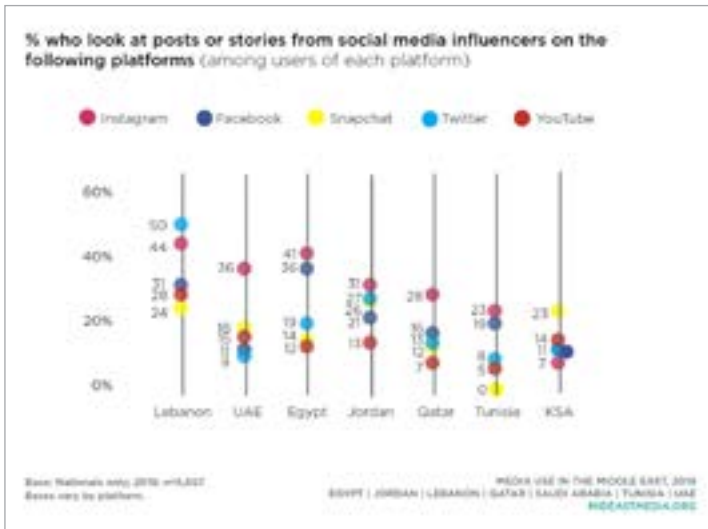
Following social media influencers



Social media influencers have a strong presence in the region. At least half of nationals in each country say they look at posts or stories from social media influencers. Nationals in the Gulf countries are more likely than other Arab nationals to look at stories and posts from influencers. Moreover, about a third of nationals look at posts from social media influencers every day, ranging from two in 10 in Tunisia to four in 10 in Qatar and the UAE.

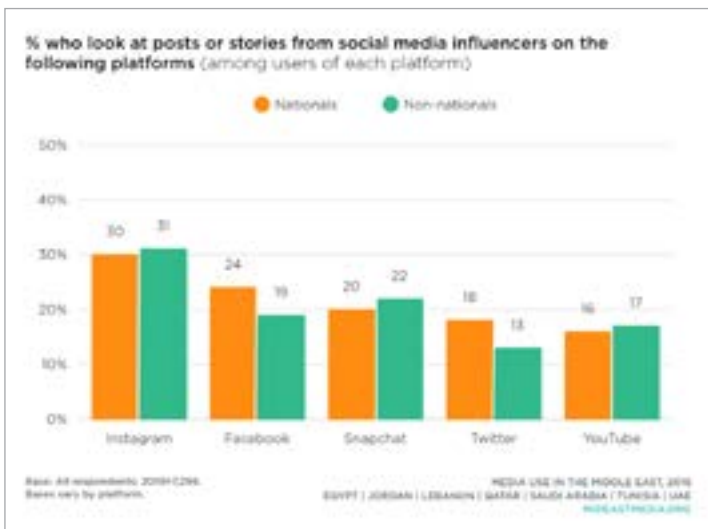
The youngest nationals (18-24) are more likely to pay attention to social media influencers, but notably, more than a third of the oldest age group (45+) also looks at posts or stories from influencers (78% 18-24-year-olds, 72% 25-34 year-olds, 60% 35-44 year-olds, 37% 45+ year-olds). In terms of frequency, four in 10 of the youngest age group say they look at posts from social media influencers every day, three times the rate of the oldest nationals (42% 18-24 year-olds, 34% 25-34 year-olds, 26% 35-44 year-olds, 14% 45+ year-olds).

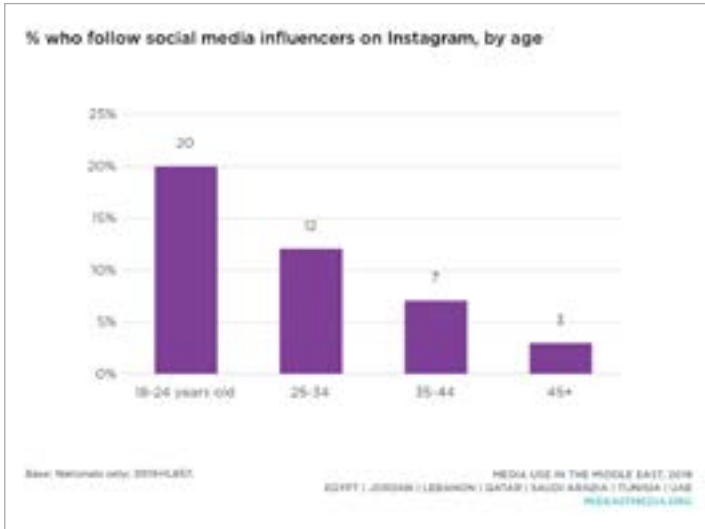
Non-nationals in the region are more likely than nationals to follow social media influencers. About nine in 10 Asian and Western expats say they look at posts and stories from social media influencers at all, and half do so every day (at all: 62% Nationals, 79% Arab expats, 89% Asian expats, 95% Western expats; at least once a day: 30% Nationals, 42% Arab expats, 51% Asian expats, 52% Western expats).



Instagram is the most popular platform for looking at posts from social media influencers, followed by Facebook and Snapchat, among nationals who use each of these platforms. On a country by country basis and among users of each platform, respondents most often use Instagram to follow social media influencers in most countries, with a few exceptions. Twitter is most popular in Lebanon, and Snapchat is most popular in Jordan to look for posts and stories from social media influencers.

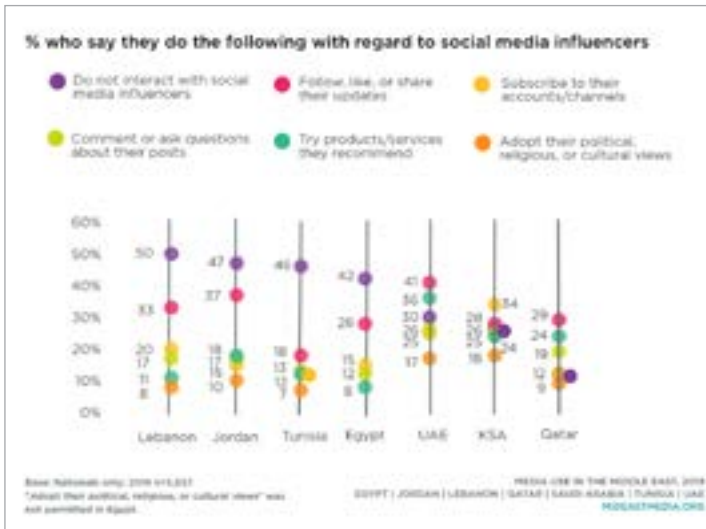
Nationals and non-nationals generally use similar platforms to follow social media influencers, but nationals are more likely than non-nationals to follow influencers on Facebook and Twitter.





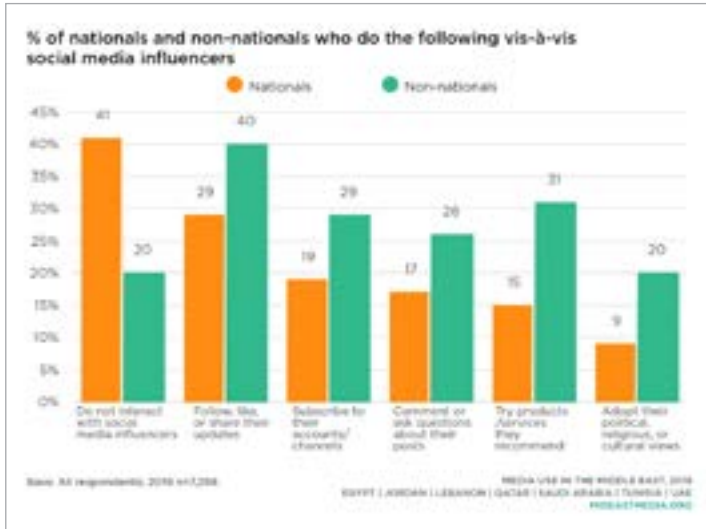
Among users of each platform, all age groups use similar platforms to access content from social media influencers, with one notable exception: the youngest nationals are the most likely cohort to follow social media influencers on Instagram. Among Instagram users, 34% of 18-24 year-olds, 27% of 25-34 year-olds, 29% of 35-44 year-olds, and 22% of 45+ year-olds use this platform to follow social media influencers. In fact, 20% of all 18-24 year-olds follow social media influencers on Instagram, far more than any other age cohort.

Interacting with social media influencers



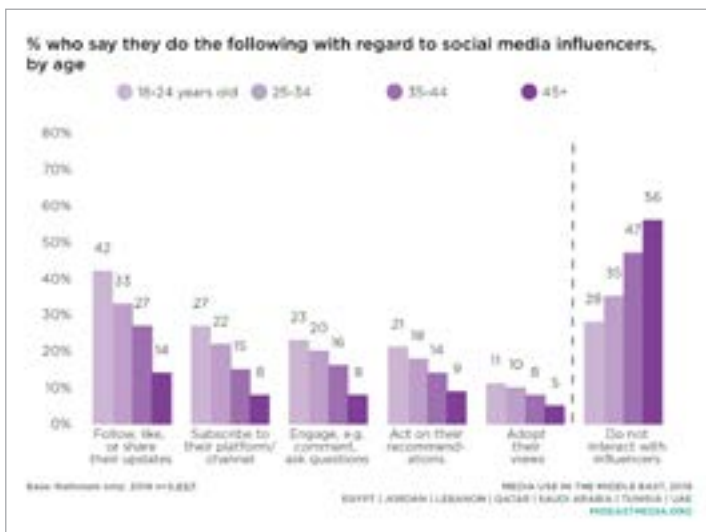
Many nationals not only look at posts from social media influencers, but also interact with them, especially majorities in the Arab Gulf states. Interacting with social media influencers is less common among Egyptians and Tunisians than nationals of other countries. Many nationals say they follow, like, or share posts from social media influencers, but less common is actively engaging or taking action based on influencers' views and opinions.

One in four Qataris and Saudis and one-third of Emiratis say they act upon influencers' commercial recommendations, and at least one in four Saudis and Emiratis subscribe to influencers' accounts/channels or actively engage with them such as posting comments or asking questions. Fewer nationals overall say they adopt the political, religious, or cultural views of social media influencers, but Saudis and Emiratis are more inclined to do so than nationals from other countries.

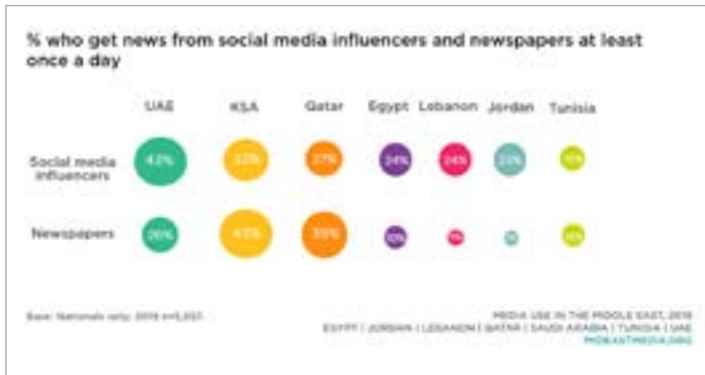


Non-nationals are far more likely to interact with social media influencers than nationals—by roughly 20 percentage points. Notably, non-nationals are twice as likely as nationals to act upon influencers’ recommendations (31% vs. 15%).

About one in five younger nationals—under 35—says he/she actively engages with social media influencers by subscribing to their platforms/channels, commenting and asking questions, or acting upon their recommendations, compared to less than 10% of those 45 and older. Few nationals in any age group—10% or less—say they adopt the political, religious, or cultural views of social media influencers.



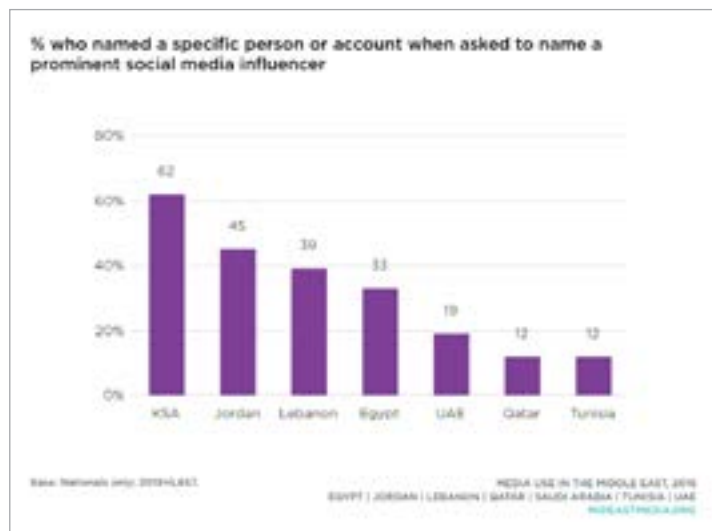
Getting news from social media influencers



Many nationals are more likely to get news from social media influencers than from newspapers. Greater proportions of Egyptians, Jordanians, Lebanese, and Emiratis get news and information from influencers than from newspapers; whereas Qataris, Saudis, and Tunisians use both mediums in roughly similar proportions. Qataris and Saudis favor newspapers for daily news and information. Nationals from the Gulf states are more likely to use social media influencers for news and information than other nationals (KSA 92%, Qatar 81%, UAE 78% vs. Jordan 57%, Lebanon 52%, Tunisia 52%, Egypt 42%).

The youngest nationals (18-24) are three times more likely to get news and information each day from social media influencers than from newspapers. In comparison, those 45 and older are more likely to get news and information daily from newspapers (get news and information at least once a day: 18-24 year-olds: 35% influencers vs. 11% newspapers; 25-34 year-olds: 28% influencers vs. 14% newspapers; 35-44 year-olds: 20% influencers vs. 17% newspapers; 45+ year-olds: 13% influencers vs. 20% newspapers).

Notable social media influencers



While the majority of nationals look at content from social media influencers generally, respondents were also asked if they pay particular attention to one social media influencer more than others. When asked which social media influencer comes to mind first, the majority are not able (or do not care) to provide a name. Six in 10 Saudis provide the name of a social media influencer, while fewer than two in 10 Qataris, Tunisians, and Emiratis name a specific influencer.

The few social media influencers named with some frequency are:

- **Egypt:** Mohamed Salah, footballer (3%), Ali Gozlan, politician (2%).
- **Jordan:** Dr. Mohammad Nouh, scholar and preacher (6%), Mohammad Al Wakeel, media mogul (3%), Dr. Kholoud, fashionista (2%).
- **Lebanon:** Nancy Ajram, singer (2%), Karen Wazen, fashion and family (2%).
- **Qatar:** Ahmed Sharif, video producer (2%). Of note, 33% of Western expats and 11% of Asian expats name Ahmed Ibrahim al-Fagih (novelist), 33% of Western expats name Aziz Pasha (activist), 15% of Western expats name Mansour Al Salem (footballer), and 8% of Asian expats name Dr. Kholoud.
- **Saudi Arabia:** Ali Najem, radio personality (5%), Ahmad Al Shagairi, activist (3%), Secretary of the Lord, politics (3%), Dr. Kholoud (2%), Aziz bin Fahd, royalty (2%), Lubna Olayan, businesswoman (2%). Of note, 6% of Arab expats name Mohammed Assaf (singer) and 5% name Amr Khaled (preacher).
- **Tunisia:** no one mentioned by 2% or more.
- **UAE:** Mohamed bin Rashid, politician (3%).



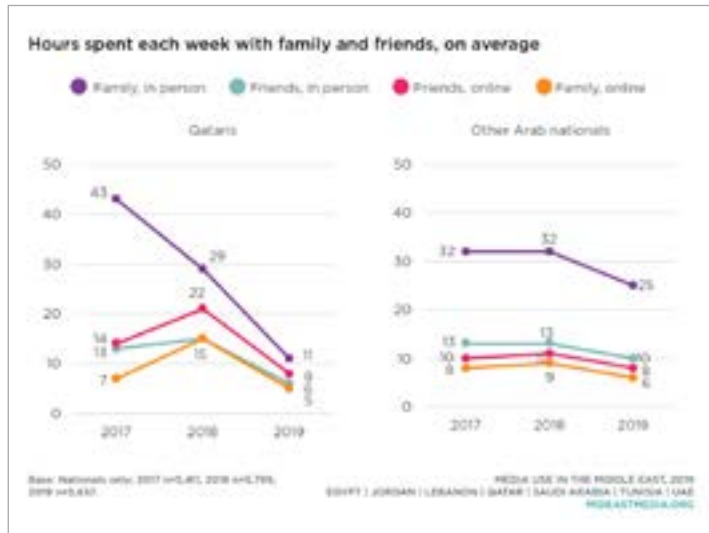
FOCUS ON QATAR



In this chapter

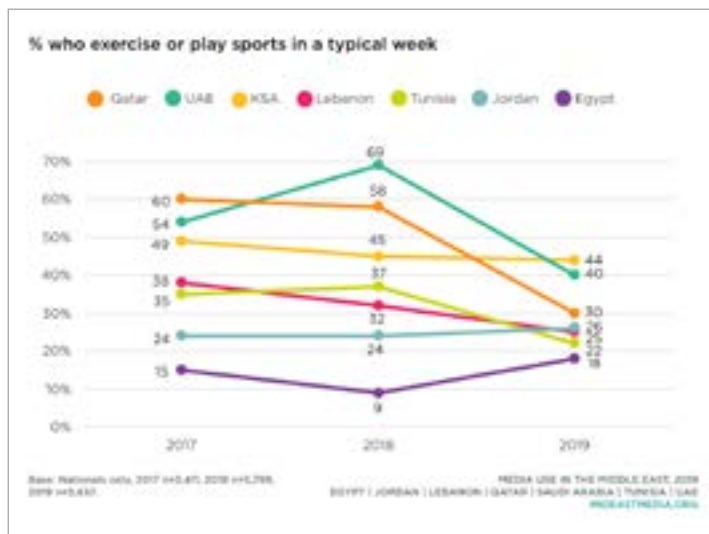
- Time spent with family and friends
- Internet behaviors
- Attitude about censorship

Time spent with family and friends



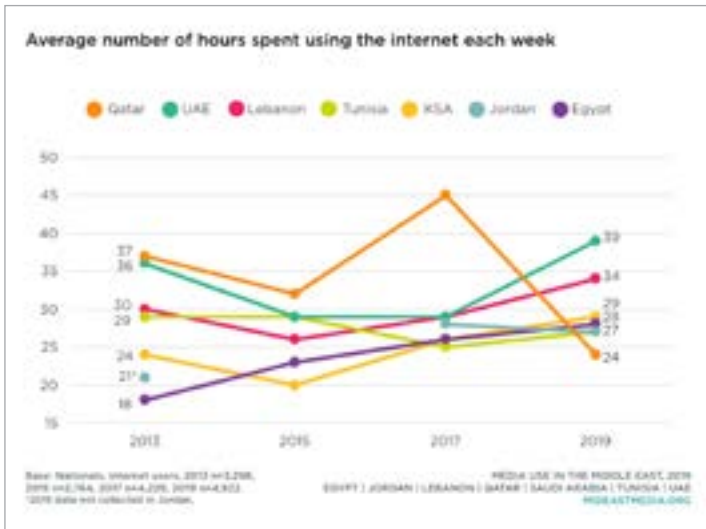
Qataris are outliers on a greater number of behavioral and attitudinal variables since a blockade was imposed on the country in 2017 by several Arab countries, including three countries in this study (Saudi Arabia, Egypt, and the UAE). Qataris now spend less time online, less time with family and friends, and are less supportive of internet regulation. Some of these changes may not be due to the multi-country blockade of Qatar; yet, clear and major changes in social behaviors and attitudes have emerged in the last few years.

While the average hours nationals spend each week with family and friends in-person and online fell across the Arab region since 2017, the drop among Qataris is stark; Qataris spent 43 hours each week in 2017 in-person with family compared to 11 hours in 2019, a 75% decrease. Nationals in other countries also registered a significant but less dramatic decrease: from an average of 32 hours per week in 2017 to 25 hours in 2019.



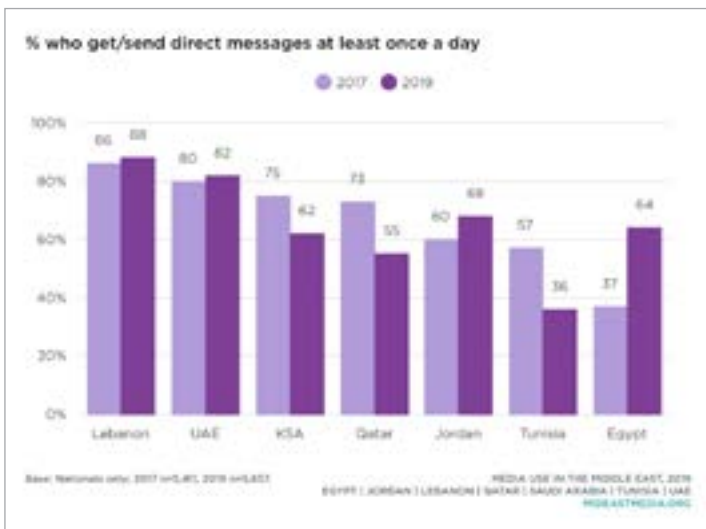
Also declining is the share of Qataris who exercise or play sports each week—down by nearly half in the past year, from 58% to 30%. The UAE and Tunisia saw similar decreases in weekly physical exercise since 2018. Exercising increased in Egypt.

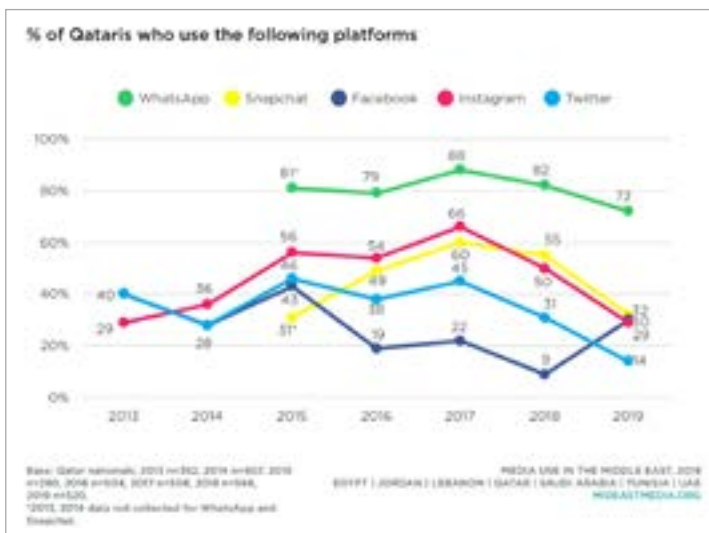
Internet behaviors



Only among Qatari nationals did the average amount of time spent online each week drop. Qataris say they spend 24 hours per week online (compared to 48 hours in 2017), which is the least amount of time spent online among the countries. In contrast, Emiratis say they spend an average of 10 more hours each week online compared to 2017.

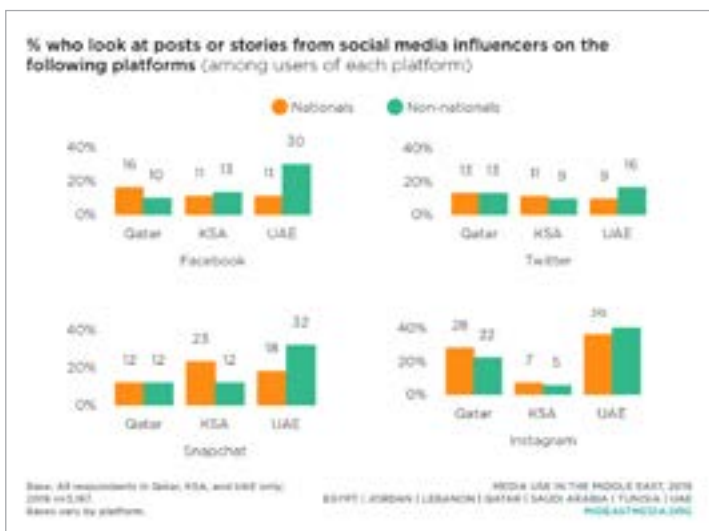
Similarly, the number of Qataris who say they get or send direct messages at least once a day is down from nearly three-quarters in 2017 to just over half in 2019. Daily messaging also declined in Saudi Arabia and Tunisia, while it increased dramatically in Egypt since 2017, consistent with an increase in internet penetration in that country.



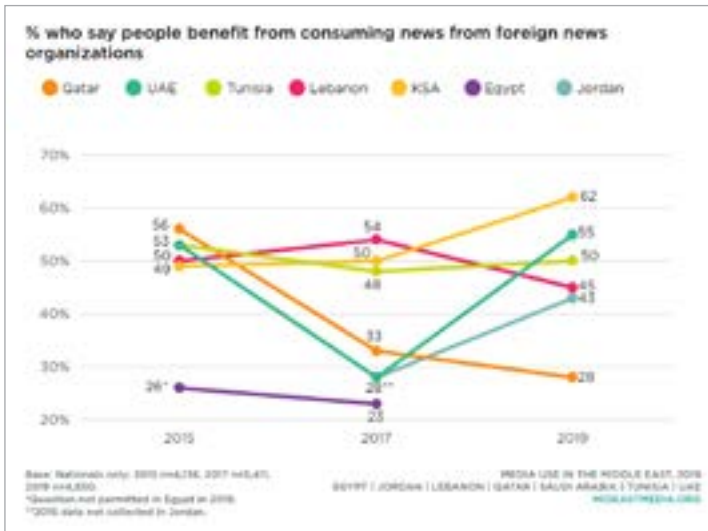


Use of several social media platforms is low and/or has been declining in Qatar. WhatsApp remains, by far, the most popular platform, still used by seven in 10 Qataris but down 16 percentage points since 2017. No more than one-third of Qataris in 2019 say they use Snapchat, Instagram, Facebook, or Twitter. Facebook has had a resurgence in Qatar, used by 30% of Qataris, up from 9% just since 2018.

In Qatar, Instagram is the preferred platform of both nationals and non-nationals to follow social media influencers. Qatari nationals, though, are more likely than non-nationals in the country to follow social media influencers on both Instagram and Facebook. Non-nationals in the UAE, though, follow social media influencers at higher rates than any other national or non-national group in the Gulf countries.

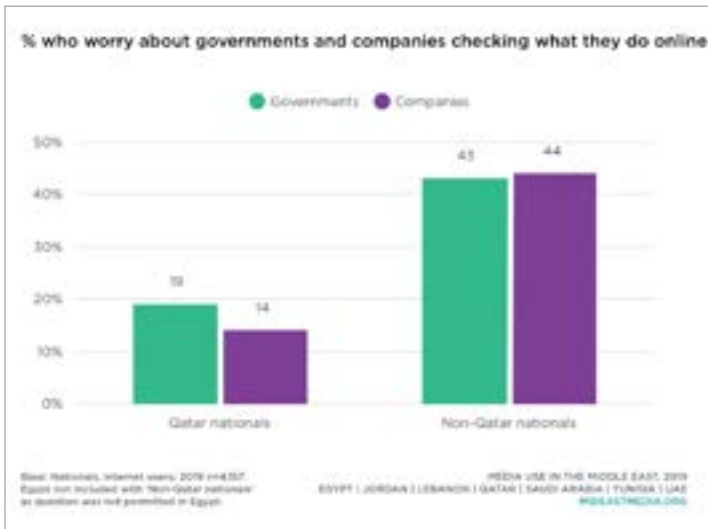


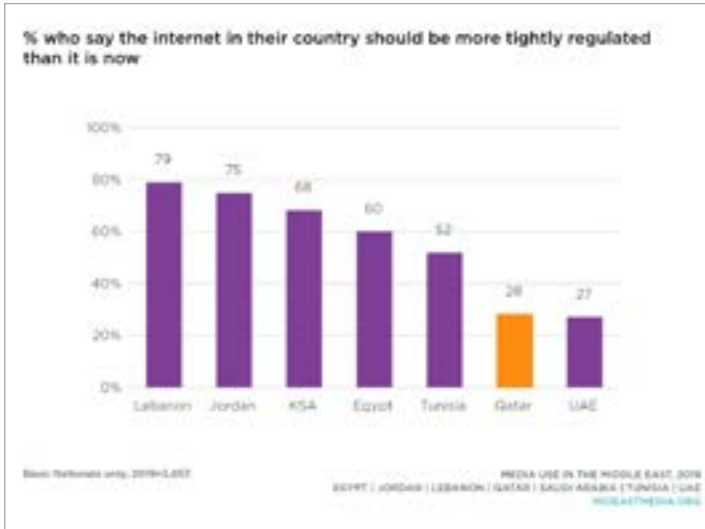
Attitude about censorship



In 2015, Qataris, more than other nationals said people benefit from getting news from foreign media organizations, but in 2019 Qataris are the nationals least likely to agree with that statement, perhaps because Qatar has been confronted by fake news assaults from Saudi Arabia, the UAE, Egypt, and other countries. Fewer than three in 10 Qataris in 2019 believe people benefit from foreign news, in contrast to four in 10 or more in all other countries.

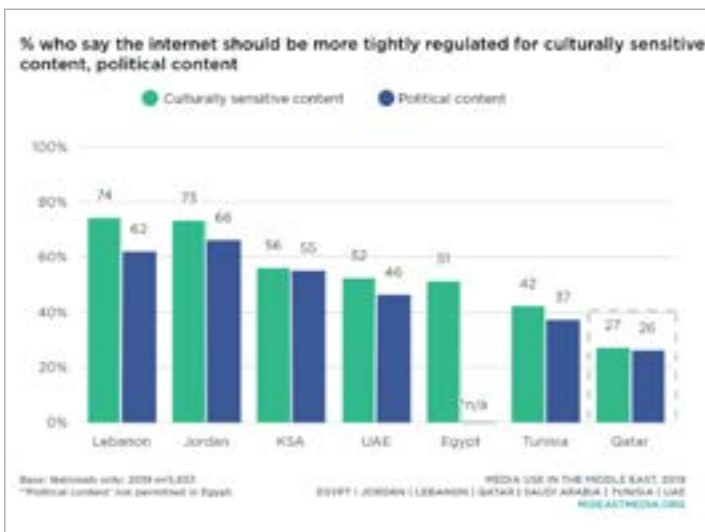
As in previous years, Qataris are less likely than other nationals to worry about governments or companies checking their online behavior; both are at less than half the rates among other Arab nationals.





Only about three in 10 Qataris favor tighter internet regulation in their country, in stark contrast to majorities in the other countries who want more internet regulation; the one exception is the UAE, where the proportion is roughly the same as in Qatar.

Qataris are far less likely to favor regulation of online political or cultural content than nationals in any other country, about half the rates among Emiratis and Saudis, and the gap is even greater compared to Jordanians and Lebanese.



CONCLUSION

Conducting this annual survey of media use and public attitudes toward media is akin to taking the temperature while preparing a weather report over time. Changes are usually incremental with an occasional dramatic variation. As with weather, in media soundings sometimes the reason for an unexpected shift or lurch may be obvious or it may require an explanation well beyond what the thermometer says. The numbers generated in survey research tell only part of the story based on what people say they do—and what opinions they express within the confines of a questionnaire. It is important, though that we be faithful and impartial reporters of what we learn through the survey, though we and others can analyze, project, and speculate about the meaning of our data after the fact. Sometimes juxtaposing one finding on another or looking at it in a comparative light, reveals an insight otherwise shrouded from view. Research on survey research suggests that people usually respond quite literally to the questions they are asked, though some may be reticent about specific queries or reluctant to respond to questions they see as potentially threatening, which gives the survey researcher the challenge of calibrating the survey instrument to elicit the most accurate responses. Awareness of the cultural, economic, and political climate is essential. During the time of data collection on our 2019 study, there were no new, notable upheavals or radical changes in the countries we studied of which we are aware. Others did come later such as the 2019 demonstrations in Beirut and others outside our scope in Iraq and Turkey. Regional threats and other conflicts continued.

Standing back from the data reported here tells us that the robust media ecosystem of the region continues to change with a sometimes

dramatic and steady growth in internet use in some countries, such as Egypt and Tunisia, from the time when we first began to collect data in 2012. Internet penetration is up and the most modern digital devices such as the smartphone and smartwatch are readily available to many. The smartphone outdistances the personal computer for most nationals across the region as 96% report they access the internet on that handheld device. The notion of media-poor and media-rich countries is now less relevant from the time when some nation-states had only 20% internet penetration to percentages in the 70s in Egypt and Tunisia and much higher in the other countries under study. Of course, there is variation by country related to local conditions, relative wealth, and other factors. Depending on the country, the medium/platform is also subject to variation, especially among the traditional print and broadcast media. People are engaging with games, online coursework, and other distractions as well.

There is something of a continuing triumph for the Arabic language with a rise of internet use in Arabic, at 79% up from 69% in 2018, for example. Greater amounts of Arabic content across several platforms were also reported. Social media, while profoundly popular and the *métier* for youth and young adults, has seen fluctuations with Facebook falling in most Arab countries since 2014 with some growth in 2019 especially in Qatar, Saudi Arabia, and Tunisia. With competition from Instagram, WhatsApp, Snapchat, and Twitter as well as gaming options on Facebook, social media now occupies a larger universe than it once did, but users can be

fickle. However, even tiny social media variations can help chart change as the competitive landscape is considered.

Among legacy media, television which has held its own and been resistant to the downturn elsewhere in the world has begun to see falling viewership with a drop from 98% among Arab nationals in 2013 down to 86% in 2019. Netflix penetration is up slightly while Shahid is down in several countries. Binge-watching has also declined. Music services like Anghami also provide entertainment options.

In an era of self-referential social media, it may be notable that Arab nationals report spending less time with friends and family both online and in-person each week. In Qatar, the amount of time Qataris spend in person with their families each week has declined dramatically from 43 hours to 11 hours per week. This seems extreme and may bear greater analysis. The decline in family time is higher in Qatar than in some other Arab states, and Qatar has often evidenced trends in advance of others in the region. Whether this signals a decline in family life or is simply a reflection of new social and cultural diversions in a country with a robust sport, recreation, and museum milieu is yet to be determined. Notably, large numbers of respondents say they trust news from social media.

On matters of free speech, opinions about what should be permissible continue to shift with less support now than in 2017 for government preventing people from criticism of government itself, religion, or minority groups. At the same time, respondents in several countries, most notably Qatar and the UAE, say they do not feel comfortable speaking out about politics. In each instance where that is true, there

may be quite different reasons for such reluctance or reticence. In Egypt government crackdowns on journalists and social activists may be an explanation while in Qatar, which is enjoying a period of national solidarity related to support for the government in the continuing blockade, there may be yet another rationale. Concern about intrusion on digital privacy by other internet users parallels concerns about intrusion by private firms and government. Over several years, the degree to which citizens accept or fear state censorship or regulation versus constraints on speech and privacy from the private sector seems to move along a continuum no doubt related to such personal experiences as internet or email hacking, identity theft, and others.

As noted in our introduction, our study examined social media influencers for the first time. The emphasis was on *how* and *how often* people connect with or engage these individuals. While this is heavily a youth phenomenon with the youngest nationals attending most to influencers, significant attention across other age groups is also evident, only declining slightly with people over 35 and much more so for people 45 or older. Three out of 10 nationals report that they look at posts from social media influencers at least once a day, more than they say they check email or play games. It does appear that social media influencers are relied on for news even more than newspapers in some countries. Such comparisons could be misleading however, as many social media influencer posts are brief snippets vs. more elongated stories in newspapers or other legacy media. Of course, social media influencers also drive traffic to these and other sites.

Ultimately tracking media use has the most value over time with reports from each year in this dedicated, longitudinal study adding texture and complexity to our understanding. And like taking the temperature day after day, year after year, it is trends over time that tell the most compelling story. For us, in 2019, we look back on both dramatic change since the first study, especially in internet penetration that has itself affected various media platforms in this region as they have elsewhere. Traditional publishing and broadcasting are still a small but robust presence though somewhat conflicted by their subsidized business model. Television remains stronger than in most societies but is showing signs of decline with digital platforms in hot pursuit. Although our study does not track and trace the number of media outlets,

websites, or publication titles, we have a sense that the media scene in the region is robust and growing overall as people have more and more options for news, information, entertainment, sports, games, commercial transactions, and other fare. Technologies have leapfrogged, taking most media into the digital age with considerable speed and effectiveness. In such an environment, our data show that competition has considerable effect on whether social media or more traditional outlets are locked in battle with each other.

The interplay and digital convergence between all media even amid disruption and disarray give media users broader choices and more to ponder as they consider their options and attitudes about the media they prefer.

—Everette E. Dennis

Appendix A: METHOD

To cite this study:

APA: Dennis, E. E., Martin, J. D., & Hassan, F. (2019). *Media use in the Middle East, 2019: A seven-nation survey*. Northwestern University in Qatar. Retrieved from www.mideastmedia.org/survey/2019.

MLA: Dennis, Everette E., Justin D. Martin, and Fouad Hassan. *Media Use in the Middle East, 2019: A Seven-Nation Survey*. Northwestern University in Qatar, 2019, www.mideastmedia.org/survey/2019.

Chicago: Dennis, Everette E., Justin D. Martin, and Fouad Hassan. "Media Use in the Middle East, 2019: A Seven-Nation Survey." Northwestern University in Qatar, 2019. www.mideastmedia.org/survey/2019.

The results for *Media Use in the Middle East, 2019* by Northwestern University in Qatar are based on 7,303 face-to-face and telephone interviews across seven countries, conducted under the direction of The Harris Poll in conjunction with Pan Arab Research Center (PARC). The survey was conducted among the general population 18 years and older in seven countries: Egypt, Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia, and the United Arab Emirates. These seven countries represent a broad spectrum of populations across the Arab region. The fieldwork for six of the countries in this seventh annual edition of the *Media Use in the Middle East* survey took place June 20 to August 20, 2019. Bureaucratic hurdles in Egypt delayed data collection in that country, so fieldwork in Egypt took place September 02 to October 06, 2019.

The 2019 survey replicated many of the questions included in the 2013, 2015, and 2017 surveys; longitudinal comparisons are provided when applicable. The 2014, 2016, and 2018 surveys focused on entertainment media in the Middle East and are only referenced in a small number of questions. The 2019 and prior iterations of the survey are available at www.mideastmedia.org.

Some figures in this report do not include Egypt, Jordan, and Qatar, as officials in these countries did not permit the fielding of certain questions in some years of the *Media Use in the Middle East* study—Egypt and Jordan in recent years and Qatar only in 2013 and 2015. Excluded items mostly relate to censorship, government, politics, and religion.

Additionally, Jordan data are only included for the years it was surveyed, the 2013, 2017, 2018, and 2019 editions of the study, not those conducted in 2014, 2015, and 2016. In all charts that do not include data from Egypt, Jordan, or Qatar, a footnote so reports.

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

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

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

Interviews lasted, on average, 26 minutes. The total number of questions asked varied based on responses to previous questions. For example, some questions were asked only of internet users or users of specific social media platforms.

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

A summary of completed interviews and response rates for 2013 through 2019 is as follows:

COUNTRY	COMPLETED INTERVIEWS (N)						
	2013	2014	2015	2016	2017	2018	2019
Egypt	1,252	1,002	1,071	1,000	1,000	1,060	1,007
Jordan	1,250	-	-	-	1,009	1,060	1,006
Lebanon	1,256	1,000	1,000	1,008	1,018	1,002	1,001
Qatar	1,253	1,003	1,000	1,000	1,140	1,185	1,000
Saudi Arabia	1,252	1,009	1,005	1,017	1,016	1,095	1,095
Tunisia	1,250	1,016	1,012	1,016	1,000	1,204	1,092
United Arab Emirates	1,264	1,005	1,005	1,017	1,013	1,074	1,092
Total	8,777	6,035	6,093	6,058	7,196	7,735	7,303

COUNTRY	RESPONSE RATE (%)						
	2013	2014	2015	2016	2017	2018	2019
Egypt	92%	48%	97%	46%	79%	72%	48%
Jordan	75%	-	-	-	58%	79%	44%
Lebanon	70%	50%	54%	49%	49%	48%	45%
Qatar	54%	52%	53%	44%	37%	58%	59%
Saudi Arabia	81%	78%	77%	77%	76%	74%	72%
Tunisia	21%	86%	85%	89%	87%	33%	88%
United Arab Emirates	70%	82%	86%	70%	73%	58%	55%

COUNTRY		COMPLETED INTERVIEWS BY NATIONALITY (N)						
		2013	2014	2015	2016	2017	2018	2019
Egypt	Nationals	1,252	1,002	1,071	1,000	1,000	1,000	1,007
	Non-nationals	0	0	0	0	0	0	0
Jordan	Nationals	1,044	-	-	-	881	953	920
	Non-nationals	206	-	-	-	128	62	86
Lebanon	Nationals	1,232	1,000	995	1,008	1,018	991	998
	Non-nationals	24	0	5	0	0	11	3
Qatar	Nationals	352	407	280	504	508	566	520
	Non-nationals	901	596	720	496	632	619	480
Saudi Arabia	Nationals	848	662	633	616	627	629	739
	Non-nationals	404	387	372	401	389	466	366
Tunisia	Nationals	1,150	906	909	913	896	1,100	957
	Non-nationals	100	110	103	103	104	104	135
United Arab Emirates	Nationals	313	234	250	488	481	500	516
	Non-nationals	951	771	755	529	532	574	576

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

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

While the data within countries was weighted to be representative, the overall sample of 7,303 was not weighted across countries. That is, we do not claim that aggregated data is “representative,” per se, of the Arab region as a whole. Weighting across countries was not applied due to the variable population sizes across the participating countries.

The descriptions below show the margin of sampling error based on all interviews conducted in each country supporting a 95% confidence level. For a reported percentage 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 within the margin of error plus or minus the percentage.

Total Sample

- **Sample size:** 7,303
- **Gender split:** 52% male, 48% female
- **Mean age:** 35 years old

Egypt

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic
- **Fieldwork dates:** September 02 to October 06, 2019
- **Sample size:** 1,007
- **Gender split:** 50% male, 50% female
- **Mean age:** 37 years old
- **Margin of sampling error:** +/- 3.1 percentage points
- **Representative:** Adult population, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Jordan

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic
- **Fieldwork dates:** July 24 to August 09, 2019
- **Sample size:** 1,006
- **Gender split:** 50% male, 50% female
- **Mean age:** 35 years old
- **Margin of sampling error:** +/- 3.1 percentage points
- **Representative:** Adult population, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Lebanon

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** July 09 to August 17, 2019
- **Sample size:** 1,001
- **Gender split:** 50% male, 50% female
- **Mean age:** 37 years old
- **Margin of sampling error:** +/- 3.1 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled those in labor camps, and potential respondents in areas with heavy Hezbollah presence

Qatar

- **Sample design:** Randomized sample within the household using a constant fraction sampling procedure
- **Mode:** Telephone, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** June 20 to July 20, 2019
- **Sample size:** 1,000
- **Gender split:** 56% male, 44% female
- **Mean age:** 34 years old
- **Margin of sampling error:** +/- 3.1 percentage points
- **Representative:** Adult population, less those in army barracks, hospitals, dormitories, and prisons

Saudi Arabia

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** July 01 to August 05, 2019
- **Sample size:** 1,105
- **Gender split:** 53% male, 47% female
- **Mean age:** 34 years old
- **Margin of sampling error:** +/- 3.0 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Tunisia

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, French, English
- **Fieldwork dates:** July 19 to August 04, 2019
- **Sample size:** 1,092
- **Gender split:** 51% male, 49% female
- **Mean age:** 37 years old
- **Margin of sampling error:** +/- 3.0 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

United Arab Emirates

- **Sample design:** Multi-stage random probability sampling procedure
- **Mode:** Face-to-face, adults 18 plus years old
- **Languages:** Arabic, English
- **Fieldwork dates:** July 11 to August 20, 2019
- **Sample size:** 1,092
- **Gender split:** 53% male, 47% female
- **Mean age:** 34 years old
- **Margin of sampling error:** +/- 3.0 percentage points
- **Representative:** Adult populations, less visitors with no residence permit, farmers, servants, the mentally disabled, and those in labor camps

Margin of sampling error = 1 / the square root of the sample size. Reported margins of sampling error account for data weighting.

A more detailed summary of the method, sample, and weighting can be found at www.mideastmedia.org/survey/2019.

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

Appendix B:

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Northwestern University in Qatar

P.O. Box 34102
Education City
Doha, Qatar

www.qatar.northwestern.edu
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