

A map of the Middle East region is shown in a dark purple hue. Overlaid on the left side of the map are three concentric circles in a lighter purple color. The title text is positioned over the map and circles.

Media Use in the Middle East

An Eight-Nation Survey



NORTHWESTERN
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Media Use in the Middle East

An Eight-Nation Survey

Conducted by:

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Northwestern University in Qatar

In association with Harris Interactive

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Forward

Continuous focus on the conflicts and controversies of the Middle East affords little attention to the steady and growing media sector in the region, which has an amalgam of traditional and new platforms and even whole media cities in such venues as Dubai and Abu Dhabi. With the Arab revolutions that began in 2011, greater interest in the role of the internet and social media has gained traction alongside the pervasive and expanding presence of Al Jazeera and its competitors. But the media of this often volatile region are more complex than that, as this study of *Media Use in the Middle East: An Eight Nation Study* attests. The diversity and complexity of the Middle East media scene is witnessed here through the prism of media use and attitudes toward media with special attention to the internet. Any image of the Middle East as an environment with limited choices for news, information and entertainment is quickly dispelled by a perusal of the text and data sets that follow here.

This study, including the report presented here, and an interactive website (menamediasurvey.northwestern.edu), is the product of collaborative work at Northwestern University in Qatar. Along with colleagues Robb Wood and Justin Martin, I have led this effort as we documented the need for this research and subsequently engaged Harris Interactive to work with us and conduct the field work. We are grateful to Humphrey Taylor, Kerry Hill, and Donna Knapp, with whom we worked closely at Harris as well as several colleagues for their advice and assistance along the way, including David Carr at NU-Q, Frank Mulhern and Rachel Mersey of Northwestern University, Evanston, and others at NU-Q including Jan-Marie Petersen, Sian Sadler, and DeYette Little.

We hope this study will be useful to those who are interested in a more textured understanding of the region, its people and their media use.



A handwritten signature in black ink, consisting of stylized, cursive letters that appear to read 'E. Dennis'.

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



Introduction: Understanding media use in the Middle East

Little is more important to a university preparing its students for careers in communication and journalism than understanding how people actually use the media as readers, viewers, listeners and interactive participants. Such intelligence charts the current state and probable future of media and entertainment industries, with cues about what media the audience values and how consumer use is changing. The utility and importance of such information stretches well beyond the university and its particular interests, however. It is valuable for media industries themselves, for people in institutions like business, government, the nonprofit sector, and to almost anyone who wants to communicate effectively for whatever reason.

From its beginnings in 2008, Northwestern University in Qatar has watched and endeavored to understand the media in its host country, Qatar, the wider Middle East and the global community as a whole. At the dawn of the Arab revolutions in 2011 and beyond, interest in the media has intensified with much speculation, but relatively little systematic research, about the role of the internet generally and social media specifically; or satellite television, the international press and such traditional outlets as newspapers, magazines and film. Those looking for simplistic answers assumed that the unrest and push for freedom was mainly driven or facilitated by such social media as Facebook and Twitter or more pervasively by Al Jazeera with its broad footprint in television homes. And still others opined that that continuity of coverage by international media outlets reinforced those at home and brought world attention to a region not always at the top of the news agenda. At this time of such intense interest in and scrutiny of communication attending change in the region, we decided to conduct a study of media use across the pan-Arab region.

To that end, we viewed available studies, some public and others proprietary, but found that none provided the comprehensive portrait we desired. Concurrently, NU-Q accepted an invitation to join the World Internet Project (WIP) wherein partners from major universities and research centers contribute data to

a global assessment, which is published biennially. And about that time, we contracted with Harris Interactive, a globally oriented survey research firm, to assist us and to carry out subsequent field work. As we mined other studies and began to craft our own questions, we connected them with the questions from the WIP and eventually produced a satisfactory survey instrument. After months of consultations, we determined that data collection in eight Arab nations would provide a basis to make some generalizations about the region against the comparative backdrop of the WIP study, which historically has had modest input from the Arab world. Our study is one of rather large scale with more than 10,000 interviews, nearly 90 percent of which were face-to-face encounters with people in their respective countries. With an exceptionally high response rate and confidence in the rigor of this research, we present it here for public consideration. These data will also be added to the yield of the WIP in its next compilation, thus contributing to a world-wide picture as well.

For the study, we settled on eight Arab nations representing three important geographic designators: the Levant, North Africa, and the Gulf States. Ultimately, we selected Bahrain, Egypt, Jordan, Kingdom of Saudi Arabia, Lebanon, Qatar, Tunisia and the United Arab Emirates. We could not field studies in all of the countries of the region where timing, costs and sometimes safety were potential impediments, so we present

this report recognizing that each country of the region has profound differences as well as striking similarities when it comes to media use. The results of our study taken as a whole provide a portrait of Arab media two years after the so-called Arab Spring, when freedom of expression and independent media were the mantra of several of the revolutions.

The report presented here offers both a summary of all eight countries presented as well as close-ups on the individual nations. This report in successive chapters and sections zeros in on which media people use most often, which they rely on most—and for what. We also looked at media preferred as sources of news and of entertainment. A major focus is on the internet: the preferred devices and platforms most often used, matters of freedom, privacy and regulation and the extent to which the internet is an instrument for political influence. In a region of the world where interpersonal and face-to-face communication is especially important, we examined how internet use is employed for personal transactions of everyday life. Finally, we took an especially close look at media use in the State of Qatar, the locus of our university. Our interest in this country is not simply a parochial one, but rather a portrait of a venue with some of the highest internet penetration in the Arab world—and internationally.

In assessing attitudes toward the media, one notable finding was a vote of confidence for improved quality of news media reporting between 2011 and 2013 with a majority of adults agreeing that it has improved in six of the eight countries surveyed. This optimism is also reflected in overall perceptions of media credibility in such countries as Saudi Arabia, Jordan, Qatar and the UAE, while less so in more volatile states including Egypt, Lebanon and Tunisia. Internet use is strongest in the Gulf countries—UAE, Qatar, Bahrain and Saudi Arabia and lowest in the

most populous Arab country, Egypt, which appears in question after question to be a media-poor country in spite of its large population. Only in Qatar is the internet regarded as a more important source of news than is television. In all countries respondents are multi-media users, of course. In the midst of great enthusiasm for the internet, the importance of satellite television, notably Al Jazeera, is the most popular source for news and public affairs across the region. While its popularity varies by country depending on local sources of news and other factors, Al Jazeera was mentioned by respondents in every country surveyed as a top source of news. At the same time, social networking is nearly universal among those online and no other social media site comes close to Facebook in popularity. Twitter and Google+ also get high marks in Bahrain, Saudi Arabia and UAE. Although critics once complained “that the internet only speaks English,” Arabic language use exceeded that of English across the region on most media platforms.

Amid the rapid adoption of new media across the region and the relative stability of traditional media, including newspapers and magazines, there is still some ambivalence about the impact and influence of the internet. In the data presented in this report, there is a somewhat puzzling paradox. Most respondents are optimistic about the internet as a medium of personal and political communication, with large majorities agreeing that people should be able to express their opinions online, no matter what those opinions might be. That commitment to freedom of expression in the abstract, however, breaks down on closer inspection since majorities in four countries—Lebanon, Saudi Arabia, Qatar and Tunisia — also want tighter regulation of the internet in their country. Those in Bahrain, Jordan and UAE have mixed feelings about increased

government control. These and other findings are presented in greater detail and across various demographic and language dimensions on the pages that follow. In addition, we have developed an interactive online tool that helps readers examine the data more closely by making instant country and media comparisons engaging multiple factors. For that presentation, visit menamediasurvey.northwestern.edu.

The proximity to the Arab revolutions makes this study a baseline for future research on the region that will no doubt be conducted in a variety of disciplines. As with any survey, no matter how textured and qualified, many questions are answered but others abound. Some findings here pose hypotheses and only touch the surface of concerns that may also benefit from qualitative studies, which we hope will follow.

Begun as a project of internal interest at NU-Q, we are pleased to publish it for wider public consideration. We believe many of the findings offer urgent intelligence for media industries and their personnel as well as policymakers, scholars, business leaders and other interested individuals in the Middle East and globally. Further, the data illuminate and enhance understanding about an important aspect of the Arab Spring and its aftermath. Media use and attitudes toward the media, especially the internet, are important aspects of social and economic change.

– EED, JDM, RBW

Survey Methodology

The Media Use in the Middle East survey was conducted by Harris Interactive Inc. on behalf of Northwestern University in Qatar. The survey was conducted among the general population 18 years and older in eight countries in the Middle East. Across the eight countries, a total of 10,027 respondents completed the survey. Fieldwork was conducted between December 26, 2012 and February 5, 2013 in seven of the eight participating countries and between March 26, 2013 and April 18, 2013 in Qatar.

Sample and Response

Country	Sample Size	Response Rate
Bahrain	1250	83%
Egypt	1252	92%
Jordan	1250	75%
KSA	1252	81%
Lebanon	1256	70%
Qatar	1253	54%
Tunisia	1250	21%
UAE	1264	70%
TOTAL	10,027	

The survey was conducted face-to-face in seven of the eight participating countries and via telephone in Qatar. The survey was offered in Arabic, English and/or French. The languages offered varied by country.

In Bahrain, Egypt, Jordan, KSA, Lebanon, UAE and Tunisia a multi-stage random probability face-to-face sample was implemented. In Qatar, a random telephone sample was implemented. Sampling plans were developed based on age, gender and region. In Egypt, Qatar, KSA, UAE, the sampling plan also took into account ethnicity – National, Arab Expatriate, Asian Expatriate and Western expatriates. In Qatar, quotas were also set for landline versus mobile only respondents. Weighting was applied in Egypt, Qatar, KSA, and UAE to be representative by ethnic group, region, age and gender.

For more information on the Media Use in the Middle East Report, including the methodology, detailed results and questionnaire, please contact Justin Martin or Robb Wood at Northwestern University in Qatar: justin.martin@northwestern.edu and rwood@northwestern.edu. For more information on the Media Use in the Middle East Report, go to menamediasurvey.northwestern.edu.



Executive summary

Summary of results

This report provides a view of how people in the Middle East use media and how they feel about their effect on their lives and societies. We interviewed approximately 1,250 people in each of eight countries - Bahrain, Egypt, Jordan, Lebanon, Qatar, Saudi Arabia, Tunisia and United Arab Emirates – nearly 90% of them face-to-face. The representation of nations from across this diverse area, while incomplete, allows for some consideration of media use in the region as a whole, while also highlighting significant differences and some surprising similarities between national and regional groups. Below are key findings described in detail in the pages that follow.

Overall media use

- Television remains the most popular medium in the geographical area covered in this study. Virtually every household watches TV. Typically, adults spend just over three hours a day in front of a television. Internet is a close second though, with internet users spending just under three hours a day online at home.
- Internet use is ubiquitous in the Gulf, even rivaling TV in those states, but lags far behind in Egypt and Jordan.
 - o The generation gap in internet use is wide. 82% of people under the age of 25 use the internet, compared to only 37% of those over 45.
 - o The gender gap is significant but far less pronounced than age, as 71% of men use the internet versus 60% of women.
 - o The increasingly social nature of the internet is reflected in the data, as social networking is nearly universal among internet users.
 - o Over three-quarters of internet users employ wireless devices, most notably smartphones and laptops.
- Arabic language is the dominant language used to access media in the countries in the study, though other languages, especially English, play a significant role. Use of English language is highest in the Gulf countries, which contain large expatriate populations, and where citizens often use both Arabic and English media. English websites are accessed more than Arabic websites in Qatar, Bahrain, Lebanon and UAE.

Reliance on and perceptions of media sources

- The most important source of information about news and current events is still television, but the internet is gaining ground.
 - o Young adults in all countries except Egypt rate the internet as highly as TV as a news source, and in some countries even more highly than TV.
 - o People in the well-wired Gulf consider the internet to be nearly as reliable as TV as a source for information, while those in less-connected countries outside the Gulf still rate TV as the most reliable source.
 - o Interpersonal sources are also cited as important sources of news, alongside TV and internet.
- The quality of news reporting in the Arab World is perceived to have risen over the past two years, but there remains abiding skepticism in some countries – Tunisia and Lebanon in particular. Adults in the volatile nations of Tunisia, Lebanon and Egypt are also more critical of the credibility and ‘independence’ of news media in their own country, while those in Jordan, Saudi Arabia and UAE are the most complementary of their news media.
- Television is the most important source for entertainment generally in the Arab countries in the study. However, the internet eclipses TV for entertainment in Qatar and among younger respondents generally.

Attitudes about freedom and regulation on the internet

- While most respondents feel people should be able to state their opinions online no matter what those opinions may be, they also express caution about using the internet to speak frankly about political affairs or public issues. Adding to this apparent paradox is the fact that many – including younger adults – say that they would like to see more regulation of the internet.
- A strong majority of respondents express optimism about the internet as a source of general information and learning – including about politics and public affairs – while just under half believe this ability translates into having more ‘say’ about government policies, or in exercising more political influence.

State of the nation

- Taken as a whole, there is a broad array of opinion on whether the countries covered in the study are “headed in the right direction” – some very positive, some hesitant – but on a personal level participants in this study are optimistic about their own individual futures.
- Consistent with higher levels of skepticism expressed throughout survey, adults in Lebanon and Tunisia are the most pessimistic about the direction of their countries, but even these individuals are generally optimistic about their own futures.



Survey results

Survey results:

Media sources used

Introduction

This chapter sets the stage for a detailed exploration of media usage in the eight countries in the study. The chapter's focus is on the media sources used – both legacy media formats and the internet – and on the languages used to access them. The chapter also summarizes the time spent using media, distinguishing patterns of behavior by country, age and gender.

Usage of traditional media

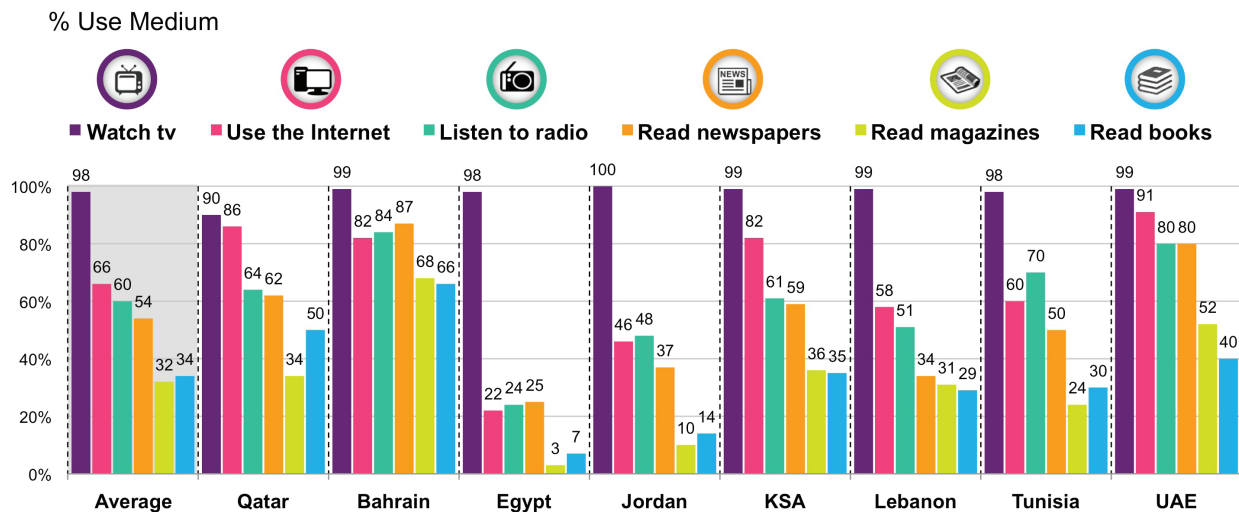
Virtually all adults in the eight countries in the study have access to television. TV is watched by at least 98% of adults, and slightly lower in Qatar (90%). In terms of popularity, TV has little competition from other traditional media. In fact, in two countries – Egypt and Jordan – television is the only traditional medium used by a majority of adults. High reliance on TV applies to all age groups and to men and women about equally.

Across the region, six in ten (60%) adults listen to the radio and slightly fewer (54%) read newspapers, despite an abundance of newspapers available in many areas.

This pattern varies considerably by country, however. For example, 80% or more adults in Bahrain and United Arab Emirates use both radio and newspapers, and usage of both media is equal – about 6 in 10 – in Qatar and Saudi Arabia. In Jordan, Lebanon and Tunisia, on the other hand, newspaper readership is much lower than radio use. In fact, only about a third of respondents in Jordan and Lebanon read newspapers, and even fewer in Egypt.

Overall, those in Bahrain access the most media: over two-thirds use all traditional media.

Media Sources Used



BASE: ALL RESPONDENTS

Q11. During a typical week, how many hours do you spend on the following activities not online?
(Total minus 'Do not spend time doing this activity/Don't know/Refused')

Q14. Do you currently use the internet?

Generally, women are less likely than men to spend time listening to radio or reading newspapers, but devote slightly more time to magazines.

The pattern of usage of traditional media is reasonably consistent across age groups. TV is universally popular, although those under 25 are a little less likely to listen to radio

(54% vs. 60% overall), and much less likely to read newspapers (46% vs. 54% overall). Those over 45 are a little more likely to listen to radio and read newspapers than younger adults, but the greatest listening and viewing is among the 35-44 age bracket – with 64% listening to radio and 59% of this group reading newspapers.

Media Sources Used by Age and Gender

% Use Medium

	AGE				GENDER	
	18-24	25-34	35-44	45+	Male	Female
Watch TV	98%	97%	98%	98%	98%	98%
Use the Internet	82%	77%	62%	37%	71%	60%
Listen to radio	54%	63%	64%	59%	65%	55%
Read newspapers	46%	57%	59%	52%	62%	45%
Read magazines	35%	33%	33%	26%	28%	37%
Read books	39%	34%	35%	29%	34%	34%

BASE: ALL RESPONDENTS

Q11. During a typical week, how many hours do you spend on the following activities not online?
(Total minus 'Do not spend time doing this activity/Don't know/Refused')

Q14. Do you currently use the internet?

Usage of the internet

The past few years have seen the internet become a major factor in the mix of media used in the eight countries covered in this study, particularly among the younger set. Two-thirds (66%) of all adults uses the internet. Internet use is almost universal in the United Arab Emirates (91%) and nearly as widespread in Qatar (86%), Bahrain (82%) and Saudi Arabia (82%). In strong contrast, only about a fifth (22%) of Egyptians, and fewer than half (46%) of Jordanians, use the internet.

The internet is strongly positioned with respect to electronic/broadcast media. The internet has surpassed radio in terms of frequency of usage (66% vs. 60%), and is more widely used than all print media, including newspapers (54% usage). (It should be noted, of course, that usage of the various media is not mutually exclusive: the internet may rival other media in usage, but does not necessarily replace them.) The internet approaches television in popularity in UAE, Qatar and Bahrain, although in other countries considerable internet diffusion is needed for parity with TV.

Respondents who use the internet have, on average throughout the geographical area covered, been doing so for about 6 years. Internet use is heavily concentrated among younger adults in all eight countries. Well over three-quarters (82%) of adults under 25 use the internet, compared to only a third (37%) of those over 45. This striking – but perhaps not surprising – concentration of young internet users applies to all countries, even in Egypt where internet usage overall is low.

Men use the internet more than women in all eight countries in the study, although the difference is modest. Overall, about seven in ten men (71%) and six in ten women (60%) are internet users. This approximately ten-percentage-point difference between men and women applies to each country, whatever its general incidence of usage may be.

Lack of media usage

It is worth noting, as context, that nearly two-thirds of those surveyed claim to spend no time at all reading either magazines or books. (The topic of availability of books and magazines was not addressed in the study.) Specifically, two-thirds (64%) of adults report spending no time reading magazines, and the same proportion (63%) give books a miss too.

This overall avoidance (or shortage) of magazines and books varies substantially by country. Fewer than one in ten Egyptians (7%), for example, read books, and hardly any (3%) read magazines regularly. Only one in eight (14%) of Jordanians read books, and even fewer (10%) access magazines. By contrast, about two-thirds of those in Bahrain read magazines (68%) and books (66%). Half of residents in Qatar read books and half (52%) in UAE read magazines.

Spending time with media

Television, as noted above, is by far the traditional medium most used in the eight countries in the study. Not only are TV sets virtually ubiquitous in every country, but people spend far more time watching TV than using any other media. The average number of hours spent watching TV is 22 hours per week, or about three hours each day. This is considerably more time each week than that spent listening to radio (9 hours) or reading books (8 hours), newspapers (6 hours) or magazines (6 hours).

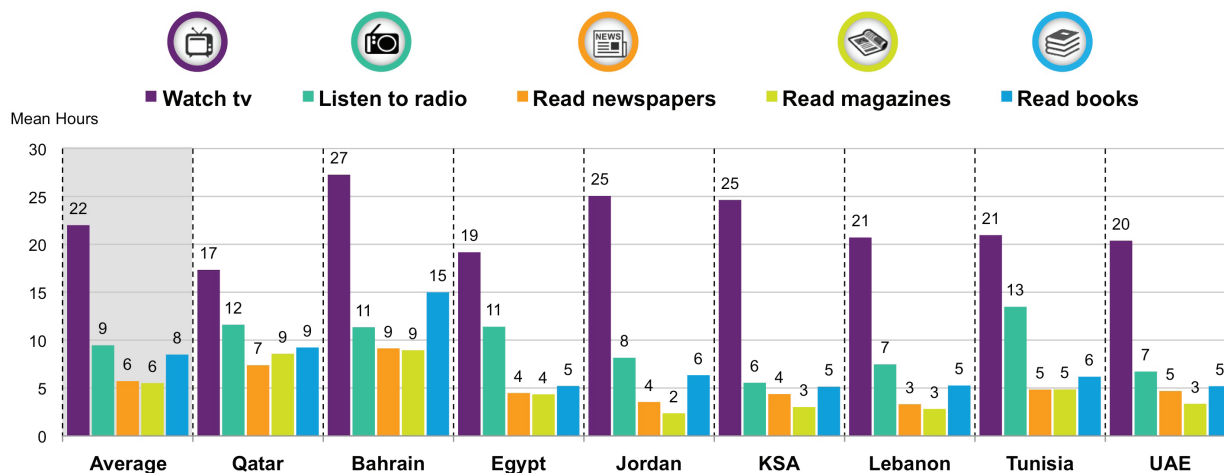
Time spent watching TV is reasonably consistent throughout the eight countries, although those in Bahrain evidently watch TV for longer than most other nationalities

(27 hours per week) and those in Qatar less often (17 hours).

Adults spend about 9 hours each week listening to radio, and 6 hours reading newspapers. Listening to radio is very popular in Tunisia, where the average time spent listening to radio is 13 hours per week. Radio is also influential in Qatar (12 hours per week), Egypt (11 hours), and Bahrain (11 hours). Considerably more time is spent reading newspapers in Bahrain (9 hours a week typically) and Qatar (7 hours) than in other countries, where the usual amount of time spent with newspapers is about 4 hours per week.

Time Spent with Media Sources

Time Spent with Each Source Per Week



BASE: ALL RESPONDENTS

Q11. During a typical week, how many hours do you spend on the following activities not online?

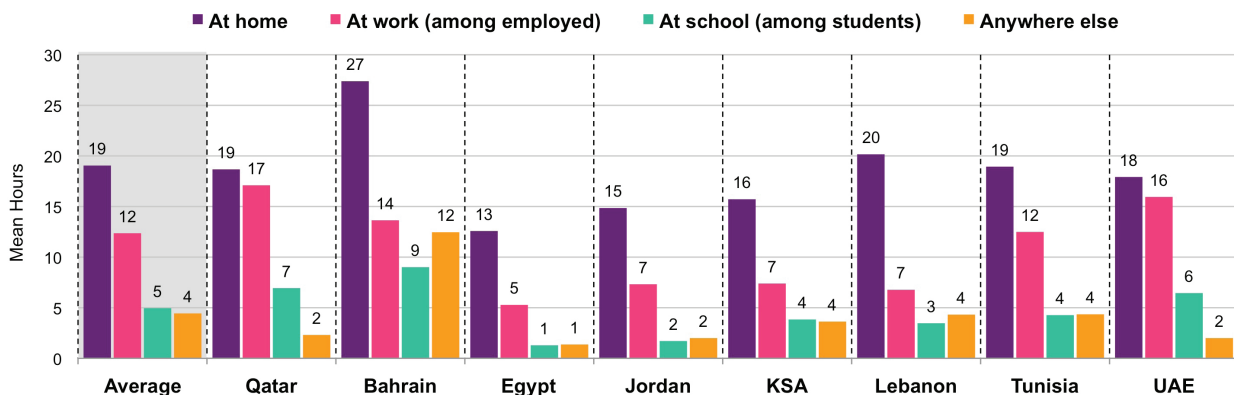
Spending time on the internet

Those who use the internet in the eight countries covered in the study spend a lot of time online. Taking 'usage at home' as an anchor and indicator, the average time spent each week on the internet is close to 20 hours – which is nearly at parity with television usage (22 hours). A sizable portion of respondents may be engaging in the two activities simultaneously. In fact, nearly three-fourths (72%) indicate that they multi-task and do other things while online, such as listen to music, watch TV or talk on the phone.

Time spent online varies significantly by country, with internet users in Bahrain – the most avid by far - spending nearly an hour longer each day on the internet (27 hours a week) than those in other countries, and Egyptians spending only 13 hours a week online at home. (Even so, that amounts to nearly 2 hours a day.)

Time Spent Online

Time Spent Using the Internet Per Week at Each Location



BASE: INTERNET USERS

Q17. On average, about how many hours per week do you use the Internet in the following locations?

Home usage is by no means the only internet venue. Those at work typically spend an additional 12 hours each week on the internet at their workplace, and students another 5 hours at school.

Perhaps reflecting the nature of the workforce in each country, those in Qatar spend the most time on the internet at work (typically 17 hours in addition to home use), as do those employed in UAE (16 additional hours), Bahrain (14 hours) and Tunisia (12 hours). In all other countries, time spent on the internet at work is about half that amount of time, around 6 hours each week. Among students, a similar pattern applies to time spent online at school, with Qatar, Bahrain and UAE 'leading' the remaining countries by several hours each week.

Time online by age and gender

While younger people are much more likely than their older counterparts to be using the internet at all, among those who are online, the younger set spends only moderately more time using the internet than do their parents' generation, typically at least 3 hours more per week. Time spent online at one's job – where online activity is less likely to be a personal choice – is fairly consistent across age groups. The younger age group, not unexpectedly, account for most internet hours at school.

There is little difference between men and women with regard to time spent online.

Time Spent Online by Age and Gender

Time Spent Per Week Using the Internet at Home

Mean Hours		Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
AGE	18-24	21.9	35.0	13.6	17.4	18.6	22.4	23.2	22.8
	25-34	19.0	25.7	15.0	14.3	15.2	20.2	19.9	17.3
	35-44	17.8	24.5	8.8	11.3	14.4	15.6	14.2	16.2
	45+	15.1	25.6	9.7	11.1	12.8	19.3	13.6	16.5
GENDER	Male	18.2	26.2	12.0	15.2	14.8	20.9	17.1	19.1
	Female	19.4	29.2	13.7	14.4	16.9	19.3	21.0	16.5

Languages used to access media

Arabic is the dominant – but not the only – language used to access media throughout the geographic area covered in the study. Arabic leads generally for all electronic media, with overall frequency of use as follows: for TV (83%), radio (78%), newspapers (74%) and the internet (71%).

The language most commonly used to access media after Arabic is English. English is more heavily used on the internet (55% English vs. 71% for Arabic), but lags behind Arabic in television (29% vs. 83%), radio (22% vs. 78%) and newspapers (29% vs. 74%).

The patterns in use of Arabic and other languages – particularly English, but also French – vary sharply by country and by medium, likely influenced by the ethnic patterns in each country. For TV, English complements Arabic in Qatar (61% Arabic vs. 56% English), Bahrain (70% Arabic vs. 68% English), and, slightly less so, in UAE (53% vs. 41%), but trails elsewhere where Arabic is the dominant language spoken.

English content is accessed to a greater extent online. English, in fact, leads Arabic in terms of content read in Qatar (76% English vs. 56% Arabic), Bahrain (69% vs. 63%), Lebanon (79% vs. 66%) and UAE (64% vs. 51%), but trails elsewhere. In Tunisia, online use of French content is closest to Arabic (85% French vs. 97% Arabic).

Newspaper readership is much more common in Arabic than in English overall (74% vs. 29%), especially in countries other

than Qatar, Bahrain and UAE. In Qatar (59% Arabic vs. 45% English) and Bahrain (65% Arabic vs. 45% English) readership of English newspapers is almost as common as Arabic news, and in UAE, English is the most dominant language (47% Arabic vs. 54% English). Yet, elsewhere Arabic dominates.

Although Arabic and English are the languages most used to access media in the eight Arab countries in the study, there are pockets of other languages that reflect the ethnic and cultural composition of specific countries. In Tunisia, for instance, French is the language most used for all media after Arabic, and many watch Hindi television in Bahrain (36%) and UAE (27%).

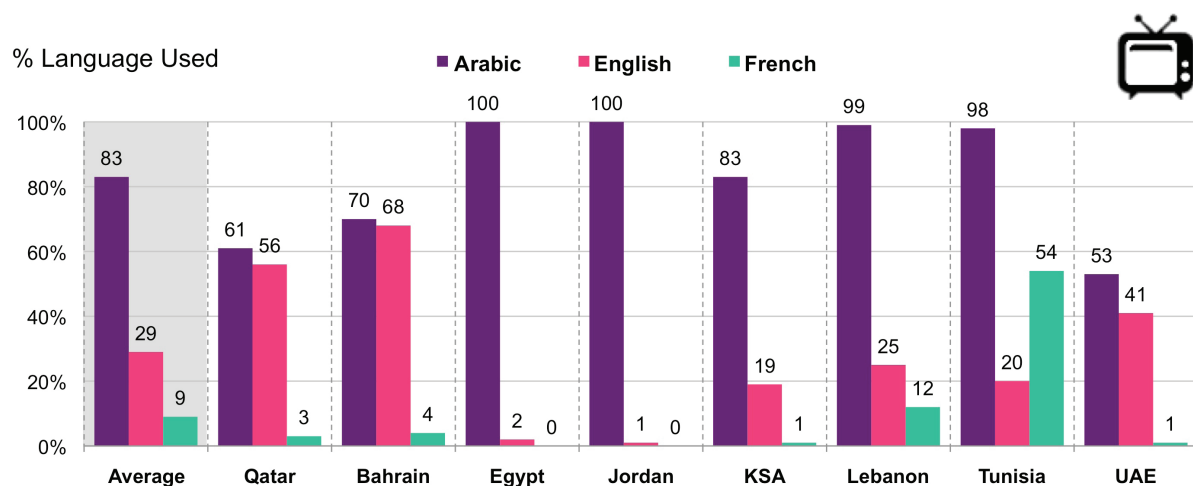
Languages Used to Access Media Type

% Language Used

		Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
TV	Arabic	61%	70%	100%	100%	83%	99%	98%	53%
	English	56%	68%	2%	1%	19%	25%	20%	41%
	French	3%	4%	<1%	0%	1%	12%	54%	1%
Internet	Arabic	56%	63%	96%	98%	77%	66%	97%	51%
	English	76%	69%	24%	25%	28%	79%	38%	64%
	French	3%	1%	0%	0%	<1%	12%	85%	1%
Radio	Arabic	66%	66%	100%	99%	83%	94%	98%	50%
	English	38%	40%	1%	<1%	14%	13%	4%	35%
	French	3%	1%	<1%	<1%	<1%	9%	28%	<1%
Newspapers	Arabic	59%	65%	100%	100%	79%	95%	97%	47%
	English	45%	45%	1%	1%	15%	9%	4%	54%
	French	2%	1%	0%	0%	<1%	9%	34%	<1%

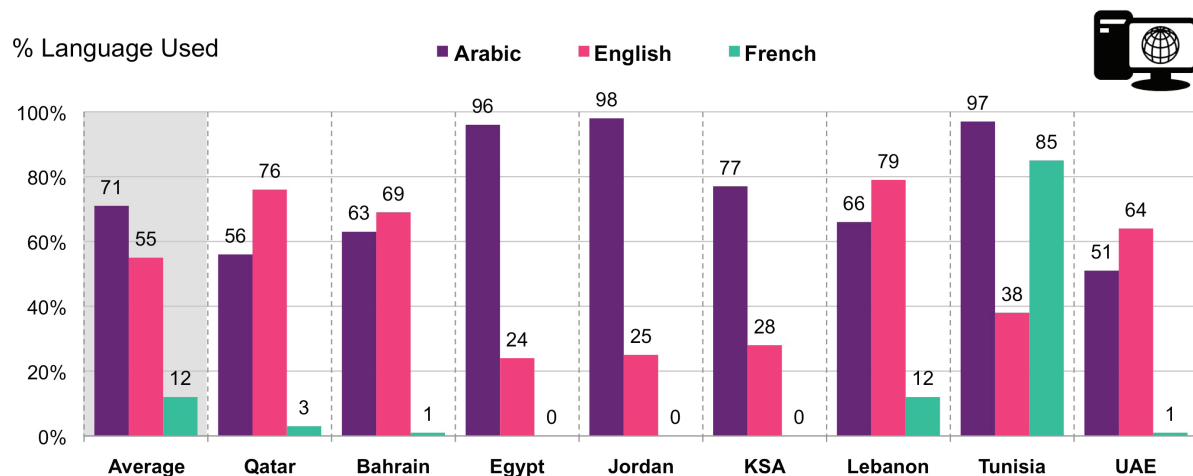
BASE: USERS OF MEDIA TYPE
Q21. Which languages do you use to access media?

Languages Used to Access TV



BASE: TV USERS
Q21. Which languages do you use to access media ["TV"]?

Languages Used to Access the Internet



BASE: INTERNET USERS
Q21. Which languages do you use to access media ["Internet"]?

Survey results:

Media reliance

Introduction

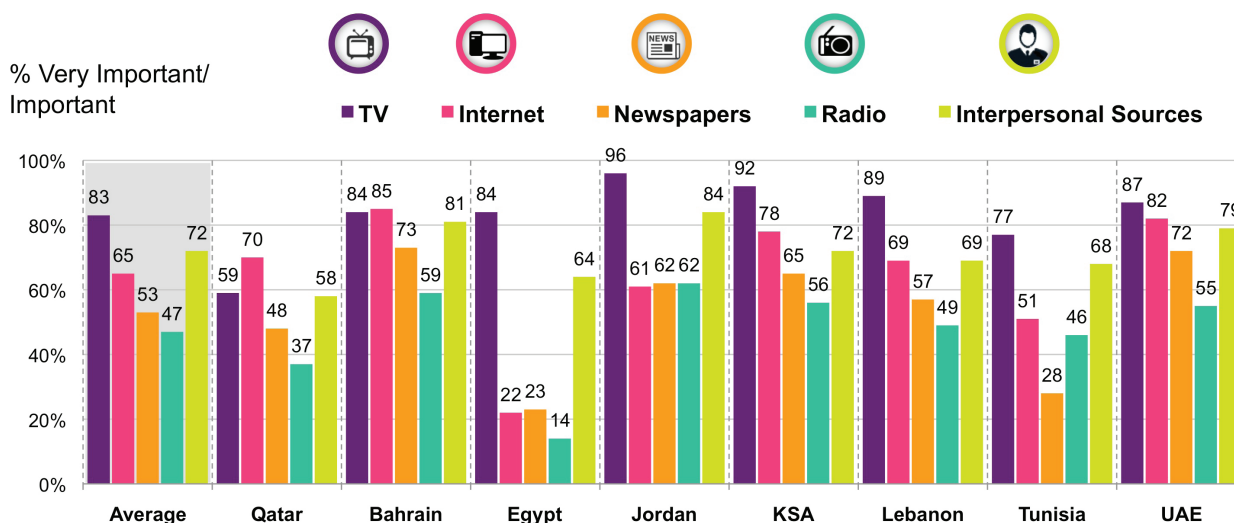
This chapter evaluates the perceived relative importance of sources of information about news and current events. Its emphasis is on electronic media and newspapers, but it also explores the importance of interpersonal sources of information. The chapter also assesses the perceived reliability of these main sources of information.

Importance of sources for news and current events

Generally, in the eight countries covered in this research, television is the most important source of information for news and current events. Well over three-quarters of adults (83%) assess TV as an important source of news. Interpersonal sources (i.e. family and friends) are also perceived as important (72% say so). Two-thirds (65%) of adults say the internet is an important information source for news and current events, in this sense indicating the internet as already surpassing newspapers (53%) and radio (47%) in importance.

The relative importance of specific sources of information about news and current events varies by country and is highly correlated with overall media use. For example, the internet has already edged television as the most important news source in Qatar (70% internet vs. 58% TV) and rivals TV as the top media source for news in Bahrain (85% internet vs. 84% TV) and UAE (82% internet vs. 87% TV). Television commands a strong lead, however, in Egypt, Jordan, Saudi Arabia and Lebanon.

Importance of Medium for News & Current Events



BASE: ALL RESPONDENTS

Q18. For news and current events, how important is each of the following to you as a source? Use the following scale:

1=Not important at all, 2=Not important, 3=Neutral/Undecided, 4=Important, 5=Very Important.

Importance of sources by age

The eminence of TV as a news source applies to all age groups, bringing into sharper focus the distinctions between age groups when comparing more traditional media and the internet. Older generations (45 and older) are more likely than the youngest generation (under 25) to rely on newspapers for information (56% vs. 46%). Much the same situation applies to radio (50% vs. 41%).

The younger generation, on the other hand, is far more likely to rely on digital media for news and information. More specifically, 74% of those under 25 vs. 48% of those 45 and older consider online news an important source for information.

Importance of Medium for News & Current Events by Age

% Very Important/Important

	Average		Qatar		Bahrain		Egypt		Jordan		KSA		Lebanon		Tunisia		UAE	
	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+
Television	81%	87%	56%	60%	84%	84%	81%	84%	93%	98%	89%	98%	86%	92%	66%	85%	82%	90%
The Internet	74%	48%	69%	56%	93%	75%	32%	13%	77%	38%	84%	57%	84%	59%	74%	22%	86%	71%
Newspaper	46%	56%	42%	49%	70%	70%	17%	29%	54%	60%	59%	68%	48%	64%	16%	32%	59%	80%
Radio	41%	50%	34%	38%	59%	59%	10%	18%	52%	64%	47%	64%	44%	55%	36%	49%	48%	59%
Inter-personal sources	71%	72%	57%	60%	83%	81%	65%	64%	83%	83%	67%	76%	67%	69%	65%	64%	79%	81%

BASE: ALL RESPONDENTS

Q18. For news and current events, how important is each of the following to you as a source? Use the following scale:
1=Not important at all, 2=Not important, 3=Neutral/Undecided, 4=Important, 5=Very Important.

Perceptions of reliability of information sources

Levels of reliability assigned to information sources broadly corresponds with their perceived importance, although the general appraisal is far from a ringing endorsement. Thus, television is generally seen as the most reliable source of information, but only by about two-thirds (69%) of adults in the eight countries covered in the study.

Only a slight majority of adults (54%) see the internet as generally reliable as a source of information, and fewer than half similarly evaluate radio (49%) and newspapers (47%).

This acceptance of TV's reliability as an information source is strongest in Jordan (93% say it is generally reliable), Saudi Arabia (89%) and UAE (85%), far more so than in the other countries. In Tunisia, fewer than half (42%) of adults find the information on television reliable.

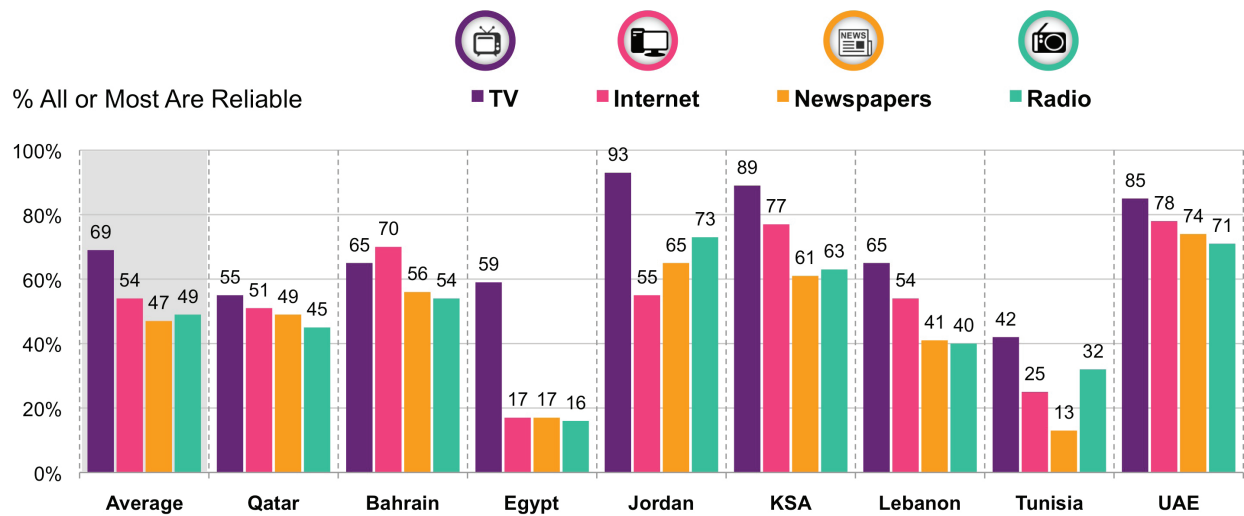
In Qatar, Bahrain, Saudi Arabia and UAE the internet is perceived as broadly similar to TV in its reliability – in Bahrain slightly more

so. Tunisians hold a more skeptical view of the reliability of all sources of information. A minority of Tunisians (42%) feel television is generally reliable, and even fewer feel the same about radio (32%), the internet (25%) and newspapers (13%). This is consistent with Tunisians' general skepticism of news media, explored more in the next chapter. Egyptians are not quite as skeptical as Tunisians about the reliability of television (59% say it is reliable), but are the most doubtful of all nationalities covered in the study of other media, none of which are deemed reliable by more than a small minority (17%) of adults.

Radio (49% say radio is reliable) and newspapers (47%), although not generally considered reliable sources of information, are both regarded positively in Jordan, Saudi Arabia and UAE.

Perceptions of reliability are fairly consistent across ages and gender.

Perceived Reliability of Information by Medium



BASE: ALL RESPONDENTS
 Q20. How much of the information from the following sources do you feel is generally reliable?
 Use a scale of 1 to 5 where "1" means none of it is reliable and "5" means that all of it is reliable.

Survey results:

Perceptions of news outlets

Introduction

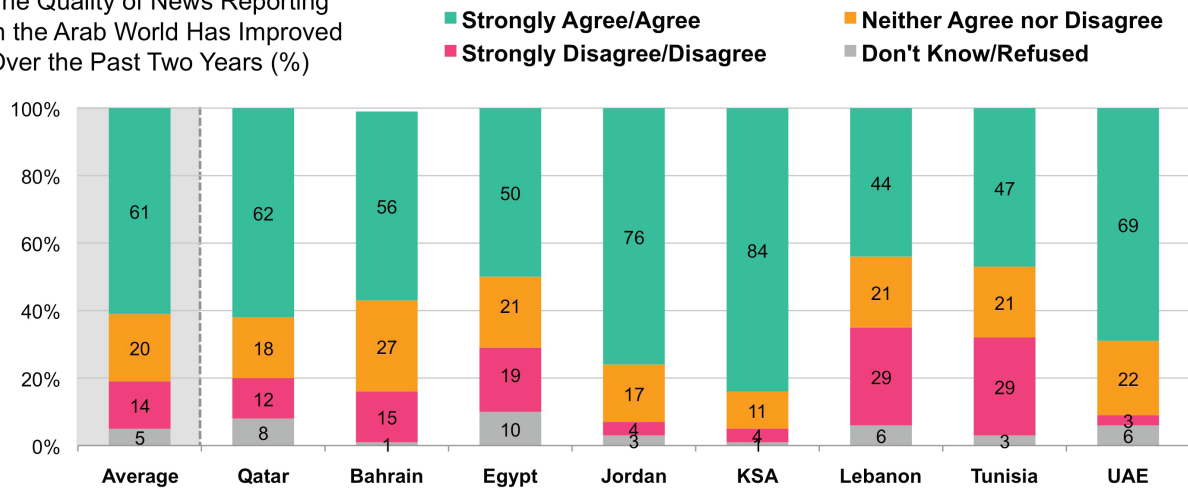
This chapter explores perceptions of the quality, credibility and independence of news outlets in the eight countries covered in the study, showing stark differences between nations.

Quality of news reporting

There is improvement in news reporting in the Arab world in the last two years, respondents report. About six in ten (61%) of adults across the eight countries feel news reporting has improved in the past two years. In Saudi Arabia, most adults (84%) believe news reporting has improved, as do three-quarters in Jordan (76%) and two-thirds in UAE (69%) and Qatar (62%). Those in Tunisia (47%) and Lebanon (44%) are more skeptical.

Increase in Perceived Quality of News Reporting

The Quality of News Reporting in the Arab World Has Improved Over the Past Two Years (%)

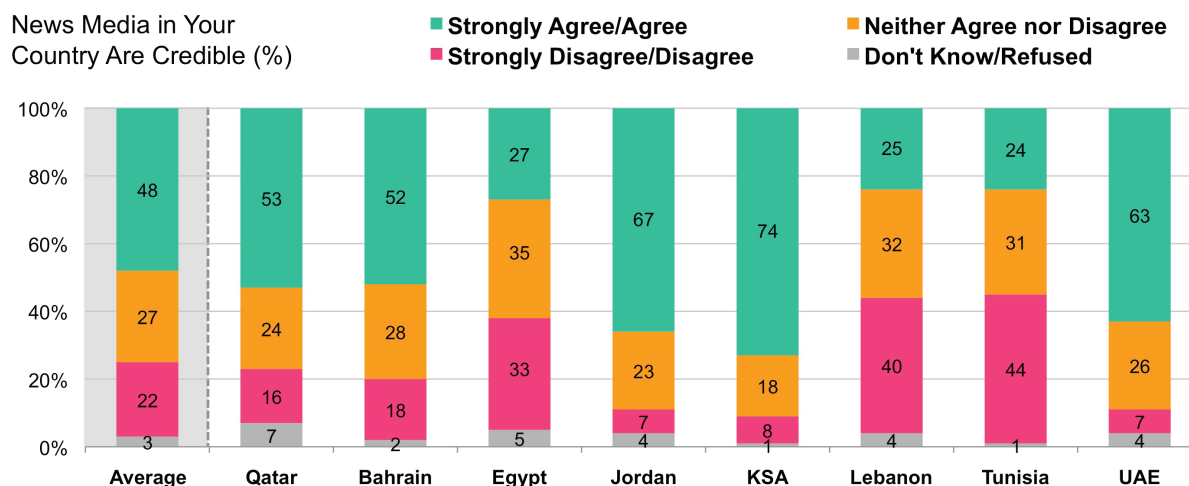


BASE: ALL RESPONDENTS
Q39A. To what extent do you agree or disagree with the following statement? Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree. Remember that you can choose any number between 1 and 5.

Credibility of news media

While many believe news reporting has improved across the region, people are not as optimistic about journalism in their own countries, with fewer than half (48%) of adults saying news media in their own countries are credible. The news is better – so to speak – in Saudi Arabia (74% say it is credible), Jordan (67%) and UAE (63%), but very weak in Egypt, Lebanon and Tunisia, where only about a quarter of adults say their news media are credible.

Credibility of News Media



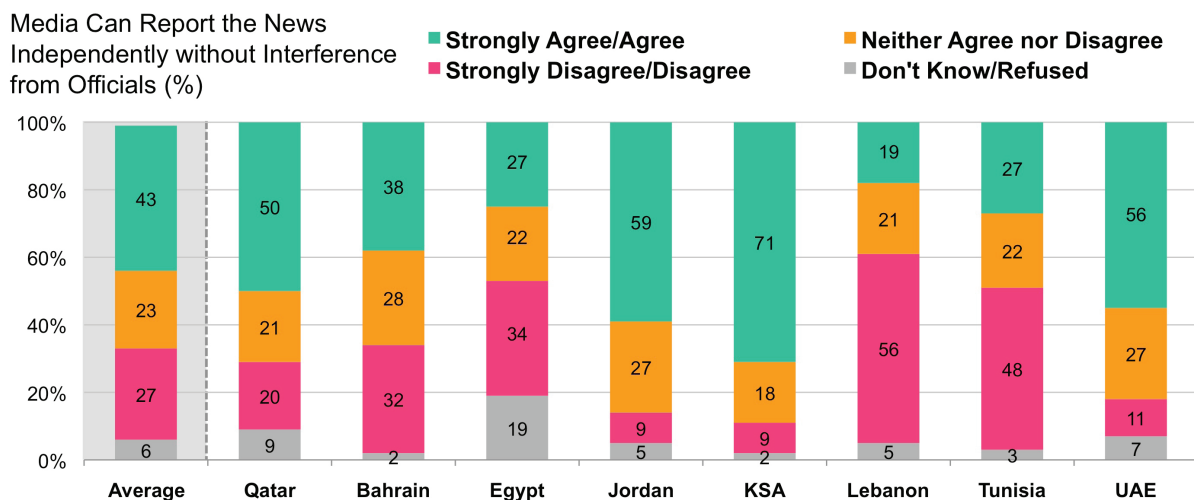
BASE: ALL RESPONDENTS
Q39B. To what extent do you agree or disagree with the following statement? Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree. Remember that you can choose any number between 1 and 5.

Independence of news media

The lukewarm evaluation of the media credibility possibly reflects perceptions of the media's independence from interference, either from officials or other entities. For example, fewer than half of adults in the eight countries covered in the study (43%) see their media as able to report news without some kind of interference. This perception of lack of independence is marked in Lebanon, Egypt and Tunisia, but far less so (i.e. more optimistic) in Saudi Arabia (where 71% see the media as independent). Respondents in other countries are mixed in their views of the latitude journalists enjoy.

General views on media in the Arab world are more sanguine than those about media in respondents' home countries.

Independence of News Media



BASE: ALL RESPONDENTS
Q39C. To what extent do you agree or disagree with the following statement? Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree. Remember that you can choose any number between 1 and 5.

Assessment of news media by age and gender

Perceptions of the caliber of the news media are broadly consistent among all age groups within any specific country, more consistent among age groups within a country than between any given age group in different countries. A similar cohesion in the views of men and women prevails in each country.

Survey results:

Sources for news

Introduction

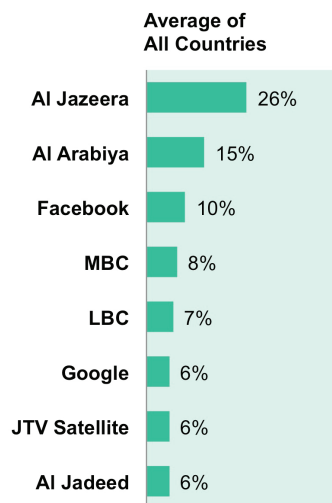
This chapter identifies the main sources of news in each of the countries covered in the study, and distinguishes their perceived relative importance by the types of news (local, national, regional, international) reported. The chapter also explores the types of websites accessed for news coverage (Arabic vs. Western) and the relative trustworthiness of websites covering Arab and Western news.

Top sources for news and current events

Among the literally hundreds of sources cited for news and current events, very few attract more than a quarter of all adults, and only one (Al Jazeera) does so across the region. The leading three sources for news (each participant could name up to three sources) are Al Jazeera (26% overall), Al Arabiya (15%), Facebook (10%). Not far behind are MBC (8%), LBC (7%), Google (6%), JTV Satellite (6%) and Al Jadeed (6%).

The frequency of usage of specific sources for news and current events varies significantly by country, with several sources showing strong followings at home, but weak occurrence elsewhere. Examples of this country-specific focus of news sources include LBC (55%), Al Jadeed (44%) and MTV (38%) in Lebanon; Mosaïque (37%), Al Tounissaya (33%) and Al Watania (30%) in Tunisia; Al Haqiqah Al Dewaliah (26%) in Jordan; Al Hayat (23%), CBC (21%) and Al Kanat Al Oula (23%) in Egypt, and Gulf News (21%) in UAE.

Top News Outlets Based on Top 3 Mentioned



Top Sources within Each Country

Qatar	Bahrain	Egypt	Jordan
Al Jazeera 40% Al Arabiya 12% The Times 7% BBC 7% Qatar 7%	Google 26% Bahrain tv 21% GDN 19% Al Ayam 12% Facebook 11% MBC 11%	Al Hayat 23% Al Kanat Al Oula 23% CBC 21% Al Jazeera 20% Al Nahar 12%	Al Jazeera 62% JTV Satellite 48% Al Arabiya 29% Al Haqiqah/ Al Dewaliah 26% Noor Al Ordon 23%
KSA	Lebanon	Tunisia	UAE
Al Arabiya 46% Al Jazeera 41% MBC 21% Al Ikhbariah 10% Okaz 6%	LBC 55% Al Jadeed 44% MTV 38% OTV 13% Al Manar 11%	Facebook 52% mosaïque 37% al tounisseya 33% al watania 30% Al Shorouk 16%	Al Jazeera 28% Gulf news 21% Al Arabiya 19% Google 17% MBC 11%

BASE: ALL RESPONDENTS

Q41. Please list your top three sources for news and current events (news organizations) and specify the type of media outlet that each source belongs to.

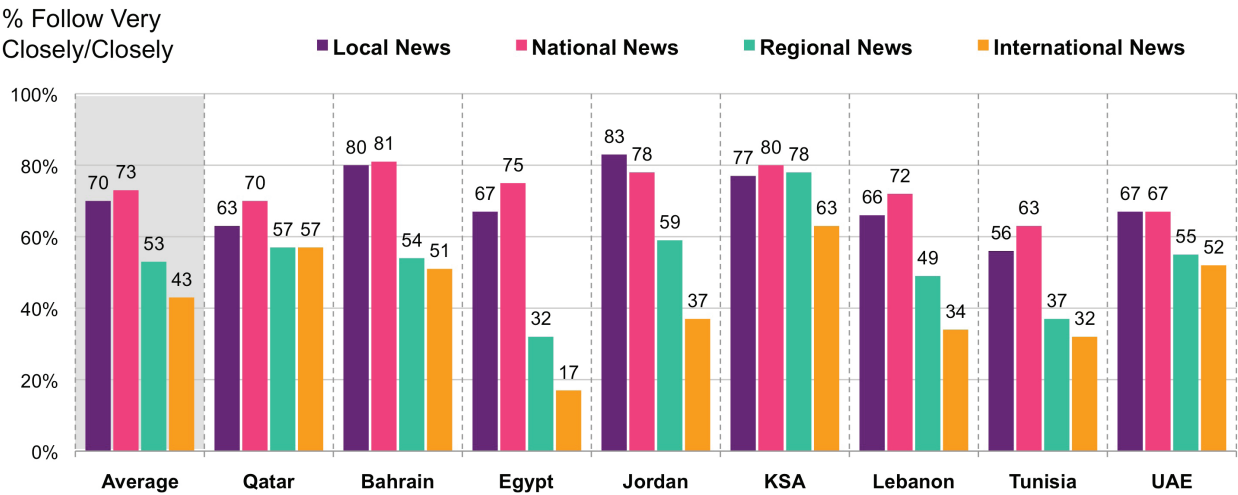
Where it is more than a minor presence for news – in Bahrain and especially Tunisia - Facebook is more often a source of news about current events for younger people – although Facebook is generally well behind Al Jazeera even among the young.

Local vs. international news

The participants in this study are avid news consumers, both local and global. National news is of most interest, followed closely by three-fourths (73%) of respondents, and local news is almost as important in this respect (70%). More than half (53%) closely follow news about the Arab region as a whole, and a strong minority (43%) pay close attention to news from around the world.

The relative importance of national news applies to all eight countries in the study, with local community news almost as important in each country – slightly more so in Jordan. Those in Gulf countries – Qatar, Bahrain, KSA and UAE – are more likely to follow regional and international news, likely due to the strong expatriate populations in these countries. Egyptians and Tunisians are far less interested in news outside their home country.

Local vs. International News



BASE: ALL RESPONDENTS
Q40. How closely would you say you follow each type of news and current events?
1=Not at all closely, 2=Somewhat closely, 3=Closely, 4=Very closely.

Generally, older adults are more diligent news followers than their younger counterparts. Those 45 and older are more likely than those under 25 to claim that they follow news closely. Men are also generally more likely than women to be close followers of news of all types, with the difference most pronounced in Egypt.

Local vs. International News by Age

% Follow Very Closely/Closely

	Average		Qatar		Bahrain		Egypt		Jordan		KSA		Lebanon		Tunisia		UAE	
	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+
Local News	62%	78%	52%	73%	76%	84%	64%	69%	71%	89%	74%	85%	54%	79%	37%	69%	55%	68%
National News	65%	81%	58%	79%	81%	82%	69%	79%	67%	84%	76%	87%	58%	84%	49%	78%	55%	70%
Regional News	43%	59%	43%	66%	46%	59%	30%	34%	45%	66%	71%	80%	36%	64%	25%	56%	46%	60%
International News	34%	45%	49%	60%	43%	56%	18%	19%	24%	42%	53%	59%	24%	42%	25%	44%	40%	51%

BASE: ALL RESPONDENTS

Q40. How closely would you say you follow each type of news and current events?
1=Not at all closely, 2=Somewhat closely, 3=Closely, 4=Very closely.

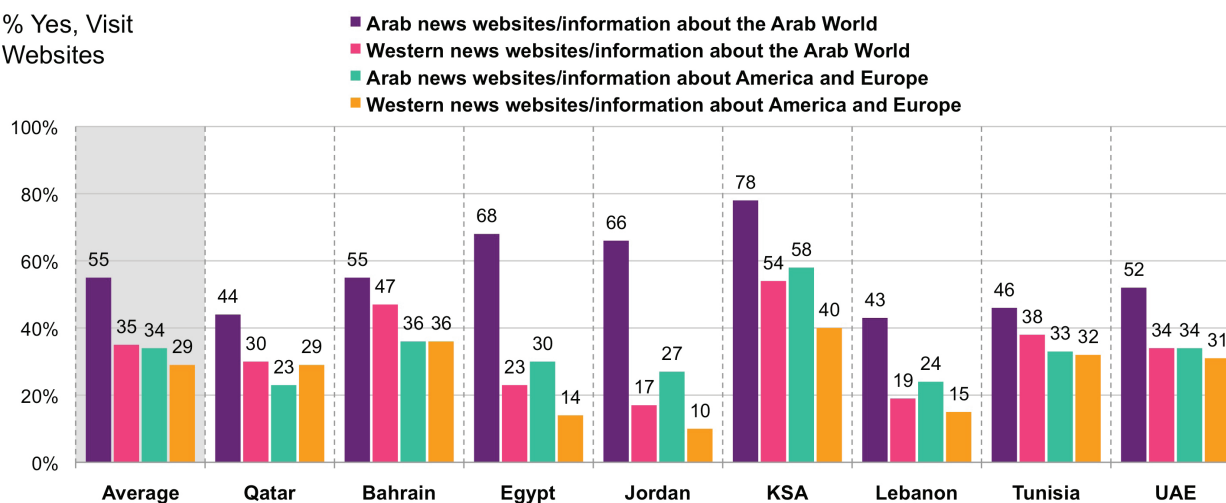
Arab vs. Western news websites

Perhaps in light of moderate to low credibility of local news sources, and a desire for a more complete picture of the news, adults online are turning to a variety of websites for news about the Arab and Western worlds. While more than half (55%) of adults in the countries in this study turn to Arab websites for news of the region, more than one-third (35%) search Western news websites for information on what is happening in the Arab world. About a third also searches both Arab websites (34%) and Western websites (29%) for news about Europe and America.

Consistent with a greater level of interest in national and regional news overall, adults in all eight countries tend to use Arab websites for news about the Arab world. However, about half in Saudi Arabia (54%) and Bahrain (47%) are tuning in to Western news sites for their take on what is happening in the region. Those in Saudi Arabia are also the most likely to be searching for information about Europe and America on both Arab and Western sites. Adults in Egypt, Jordan and Tunisia are far less likely to be accessing Western news websites overall, perhaps due to a lack of interest and/or lower proficiency with English.

Arab vs. Western News Websites

% Yes, Visit
Websites



BASE: INTERNET USERS
Q43/Q44/Q45/Q46. Do you visit Western news websites/Arabic news websites to get information about America and Europe/Arab World?

Arab vs. Western websites by age and gender

Consistent with a greater interest in news overall, older respondents are more likely than their younger counterparts to access news online via both Arab and Western news websites, with the differences most pronounced with regard to Western sites – news about the Arab world (40% 45+ vs. 30% under 25), news about Europe and America (32% vs. 21%, respectively).

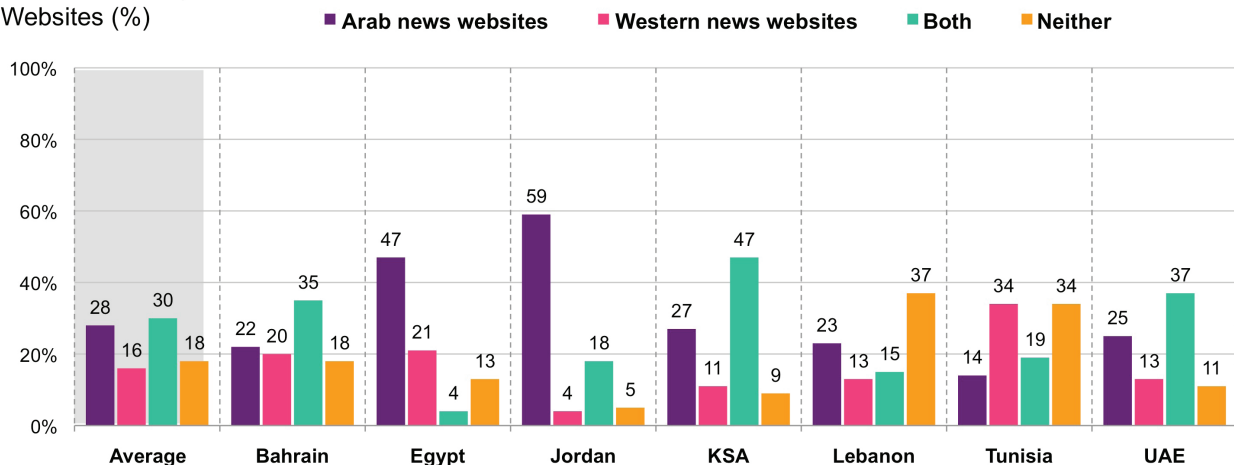
Similarly, men are more likely than women to access news websites online, both Arab and Western.

Trustworthiness of news websites

Perceptions about the trustworthiness of both Arab and Western news websites vary widely by country. Internet users in Bahrain, Saudi Arabia and UAE are most likely to say both Arab and Western news sites are equally trustworthy, while those in Egypt and Jordan are more likely to trust Arab news websites. A plurality in Lebanon and Tunisia do not trust either.

Most Trustworthy News Websites

Most Trustworthy Websites (%)



BASE: INTERNET USERS. QUESTION NOT ASKED IN QATAR
Q47. Which news websites do you feel are the most trustworthy in relaying news to the general public about current affairs?

Survey results:

Sources for entertainment

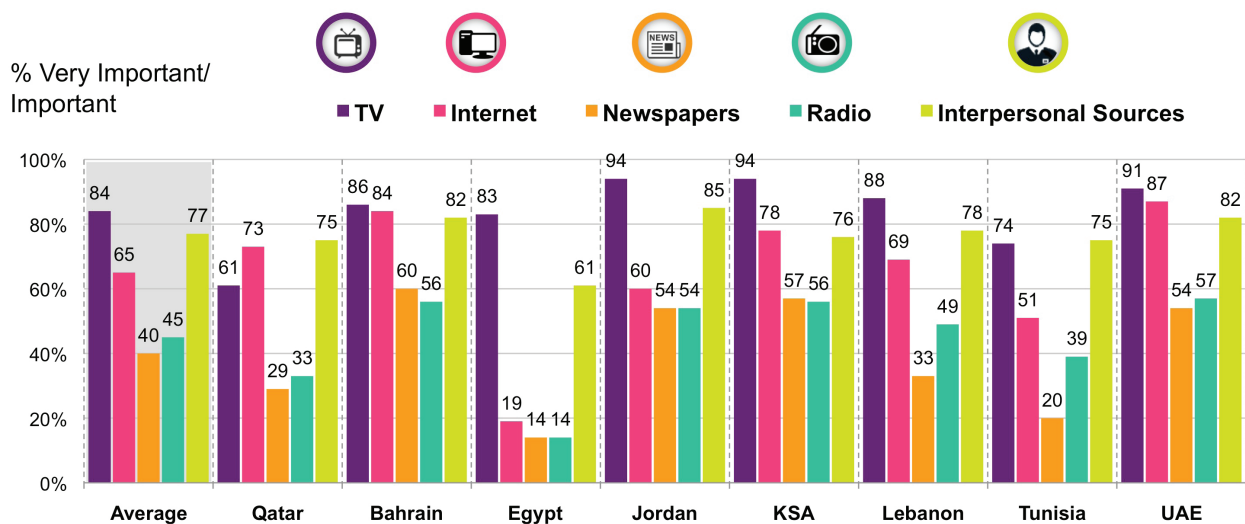
Introduction

This chapter evaluates the perceived importance of media sources for entertainment, and summarizes the evident interest in topics and types of content that are most watched on TV and online.

Importance of sources of information for entertainment

As with news and current events, television is – by a clear margin – the most important source of entertainment (84% say TV is important), followed by interpersonal sources (77%) and internet (65%). In fact, television trails the internet for entertainment in Qatar (73% internet vs. 61% TV), but leads as an entertainment source in Egypt, Jordan and Lebanon, where internet usage is much lower. In each of UAE, Saudi Arabia, and Bahrain both TV and the internet are regarded as important by at least 75% of adults.

Importance of Medium for Entertainment



BASE: ALL RESPONDENTS
Q19. For entertainment, how important is each of the following to you as a source? Use the following scale:
1=Not important at all, 2=Not important, 3=Neutral/Undecided, 4=Important, 5=Very Important.

Importance of sources by age and gender

Younger adults still regard television as the most important source of entertainment, but the internet is nearly as important to them, much more so than for older adults. Those under 25, for example, are nearly twice as likely to see the internet as an important source of entertainment as are those 45 and older (79% vs. 45%). The importance assigned to the internet by younger adults applies in all eight countries covered in the study.

Men and women regard media sources similarly in their overall importance for entertainment, but women give higher ratings than men to television and magazines for entertainment, while men look to the internet and newspapers for leisure more than women.

Importance of Medium for Entertainment by Age

% Very Important/Important Source

	Qatar		Bahrain		Egypt		Jordan		KSA		Lebanon		Tunisia		UAE	
	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+
Television	65%	59%	87%	86%	89%	78%	93%	95%	95%	94%	90%	91%	73%	78%	89%	91%
The Internet	80%	55%	96%	71%	33%	9%	81%	37%	89%	51%	90%	54%	78%	20%	92%	76%
Newspaper	28%	29%	60%	64%	12%	19%	48%	52%	53%	59%	27%	40%	16%	27%	42%	61%
Radio	32%	32%	57%	56%	14%	15%	48%	53%	51%	67%	50%	52%	32%	44%	54%	56%
Inter-personal sources	82%	69%	88%	81%	67%	57%	87%	84%	81%	74%	82%	77%	71%	75%	85%	86%

BASE: ALL RESPONDENTS
Q19. For **entertainment**, how important is each of the following to you as a source? Use the following scale:
1=Not important at all, 2=Not important, 3=Neutral/Undecided, 4=Important, 5=Very Important.

Video content on television

Participants were asked what kinds of video content they watch both on television and online. At least six types of video content are watched regularly on TV, with news the most-watched content. Eight in ten adults (80%) say they watch news, with viewership of this content particularly prevalent in Jordan (91%), Lebanon (88%) and UAE (87%). About two-thirds also watch comedy (63%), soap operas (62%) and drama (61%), followed by religious/spiritual (50%) and sports (44%). Video content of a religious nature, while popular in Egypt (74% watch), is less desired in Lebanon (36%), Tunisia (40%), UAE (39%) and Qatar (15%).

Video content on the internet

The only online video content watched by a majority of respondents is news (watched in a typical week by 57% of adults), and the only types of content watched by more than a quarter of respondents in a typical week are music videos (44%), sports (32%), game shows (31%) and 'public commentary' (31%).

While news is described as the most-watched content on the internet in general, it is not consistently popular in each country. As examples, news-viewing on the internet is very popular in Bahrain (78%) and Egypt (76%), much less so in Qatar (34%) and Lebanon (39%). Music videos are strikingly popular in Bahrain (77%), as are game shows (61%).

Video Content Viewed on TV and Online

	TV	Online
News	80%	57%
Comedy	63%	24%
Soap Opera	62%	14%
Drama	61%	16%
Religious/Spiritual	50%	24%
Sports	44%	32%
Music Videos	39%	44%
Documentary	38%	18%
Children's/Family Programming	35%	11%
Daytime Talk Shows	34%	9%
History	30%	15%
Public Commentary	25%	31%
Reality Shows	25%	11%
Game Shows	22%	31%
Home Improvement	17%	18%
Travel	10%	24%

BASE: TV=TV USERS; ONLINE=INTERNET USERS
Q22. In a typical week, what kinds of video content do you usually watch...?

Video content by age and gender

The patterns of TV viewing by topic are similar across age groups, the ranking of their relative perceived importance being similar. When watching television, however, older viewers are more inclined to watch news than younger people, as well as programs of religious or spiritual nature. Younger viewers are slightly more avid sports followers, and much more likely to watch music videos (on TV) than older respondents.

Men and women watch different content on TV in the eight countries in this study. Men are more likely to watch news, sports and documentaries; women are more likely to turn to children's or family programming, home improvement programs and soap operas. These viewing preferences apply reasonably in each of the eight countries.

Age and gender differences in viewing online video content resemble those observed for television watching. Older internet users are more inclined to watch news than younger users, but less likely to watch sports and music videos. And as with TV viewing, women are more likely to watch home improvement material and programming for family and children, and much less likely to watch sports.

Survey results:

Experience with the internet

Introduction

This chapter details who is online in the eight countries surveyed, who is not, and for what reasons. Types of internet connections – both hardwired and wireless – are enumerated.

Who is online?

As noted in an earlier chapter, 66% of people surveyed in the eight countries are online. Internet use is far higher in some countries than in others. The highest usage is in UAE (91% of adults online), and is also high in Qatar (86%), Bahrain (82%) and Saudi Arabia (82%). At the other extreme, only one in five Egyptians (22%) uses the internet. With the exception of Jordan (46% online), the other countries enjoy majorities of adults online: Lebanon (58%) and Tunisia (60%) have very similar usage.

Not surprising, internet use varies with age. More than eight in ten (82%) of those under 25 are online in the eight countries in the study, more than twice as many as those

over 45 (37%). The incidence of being online – as noted, 82% for those under 25 – is 77% in the 25 – 34 age bracket, 62% for those aged 35 – 44, and – as noted – 37% for those over 45.

In each country among the Gulf States in the study, the gap in internet use between younger and older people is marked, but not nearly as sharp as in the other countries – Lebanon, Tunisia, Egypt for example - where a factor of two separates incidence online between those under 25 and those over 45.

Men are more likely to be online than women in all eight countries in the study.

Internet Usage by Age and Gender

% Internet Usage

		Average	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
AGE	18-24	82%	91%	98%	34%	71%	96%	91%	86%	98%
	25-34	77%	92%	91%	24%	56%	91%	76%	78%	93%
	35-44	62%	88%	84%	18%	34%	80%	46%	42%	90%
	45+	37%	66%	57%	12%	16%	50%	22%	27%	77%
GENDER	Male	71%	91%	85%	28%	54%	86%	63%	61%	94%
	Female	60%	80%	78%	15%	37%	79%	52%	59%	88%

BASE: ALL RESPONDENTS
Q14. Do you currently use the internet?

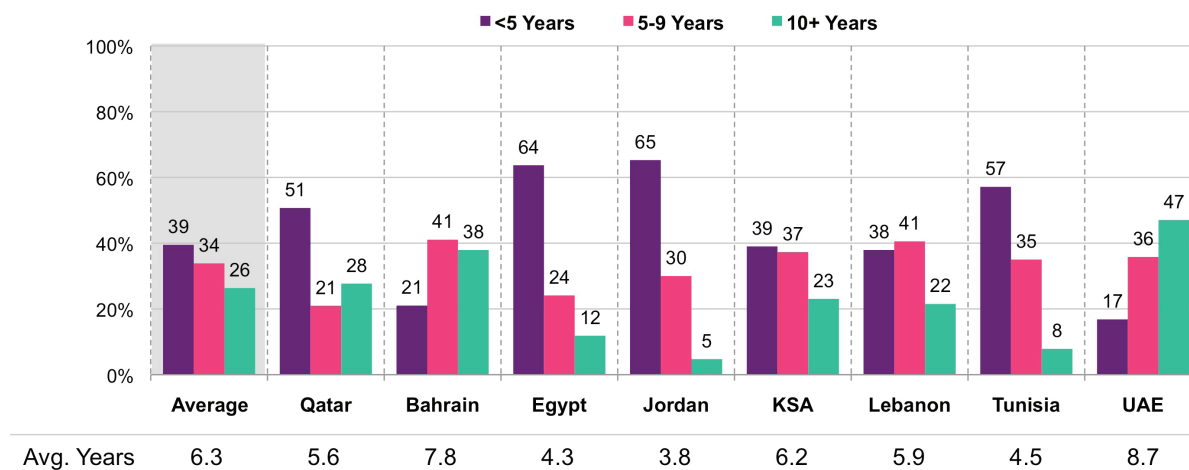
How long have respondents been online?

Internet use is relatively young in the eight countries in the study, with respondents reporting an average history online of 6 years, though there is sharp variation by country. UAE has the longest average history of internet use; nearly half (47%) of UAE adults have been accessing the internet for at least ten years. Bahrain reported nearly a quarter (38%) of adults having been online for at least a decade. By contrast, very few Egyptians (12%) claim to have been online for ten years, and even fewer Tunisians (8%) or Jordanians (5%).

In Qatar, where internet access is well established (28% of adults online for at least ten years), over a third (37%) of adults have signed up for access within the past year, the most aggressive pattern of new online usage in the countries covered in the study. On the other hand, internet use is more nascent in Jordan, Tunisia and Egypt, where more than half of (the modest number of) internet users have been online for less than five years – a considerable margin for internet growth in these countries.

Years Online

Number of Years Using the Internet



BASE: INTERNET USERS
Q15. How many years have you been using the Internet?

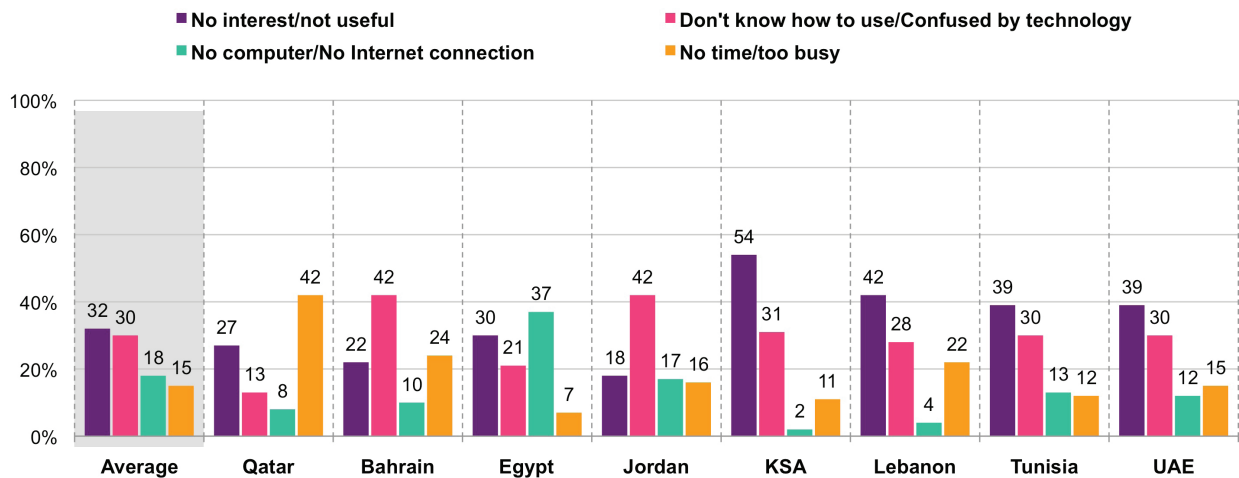
Reasons for not using the internet

When those who do not use the internet were asked why they are not online, reasons given generally reflected personal choice rather than external factors such as availability. About a third (32%) of internet non-users find it “not useful” and they have “no interest” in going online. This lack of interest in the internet is particularly marked in Saudi Arabia, where most (54%) non-users claim this as the main reason for their non-involvement. Lack of interest is also notable in Lebanon (42%), Tunisia (39%) and UAE (39%).

Interested or not, some non-users find the idea of using the internet and its technology confusing, and simply feel they do not know how to use it. About a third of non-users feel this way – more so in Bahrain (42%) and Jordan (42%). Not having a computer or internet connection is only a minor factor in non-use, with the exception of Egypt, where over a third (37%) of adults claim it as the main reason for their not using the internet.

Reasons Not Using the Internet

Main Reasons for
Not Using the Internet



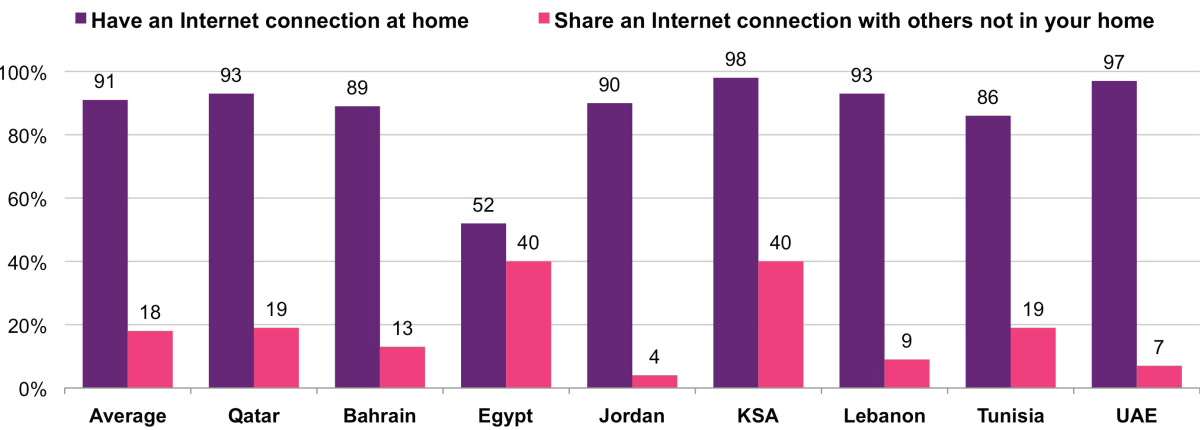
BASE: DO NOT USE THE INTERNET
Q16. What is the main reason you DO NOT use the Internet?

Internet connection at home

Almost all internet users (91%) have a connection at home. Home connections are prevalent in seven of the eight countries under study. Egypt (52%) is the only country with relatively low connectivity for a single home. Here, internet sharing is common, with 40% of internet users in Egypt saying they share a connection with others such as neighbors. Internet sharing is also done in Saudi Arabia (40%), but is less common in the other countries.

Internet Connection at Home

Internet Connection at Home vs. Shared with Others (%)

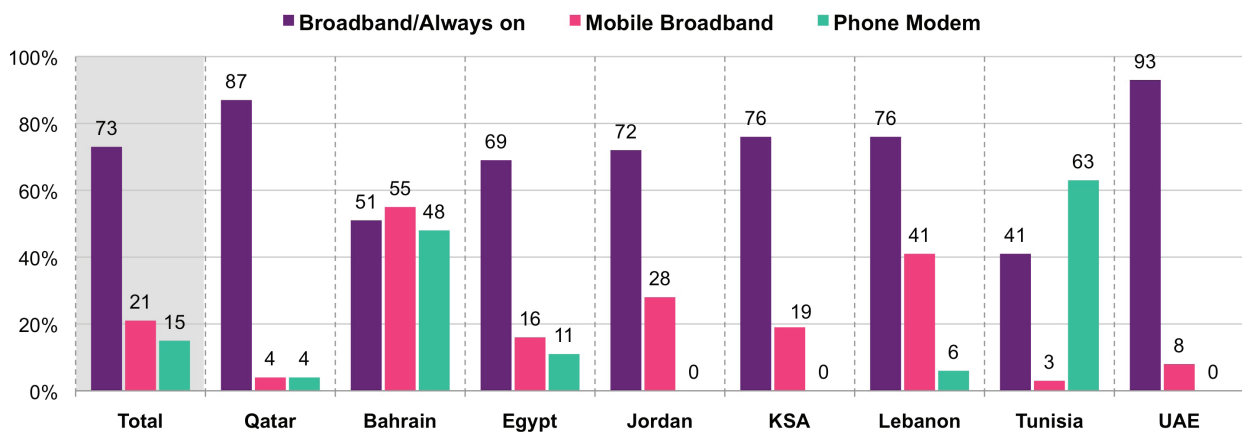


BASE: INTERNET USERS
Q24. Do you have an Internet connection at home?
Q25A. Do you share an Internet connection with others not in your home (e.g. neighbors)?

The most common type of home connection is broadband, used by three-fourths (73%) of those with a connection. Only 21% use mobile broadband at home, although usage of this connection is much higher in Bahrain (55%) and Lebanon (41%). Phone modem connections (15%) appear to be fading in most of these countries, as it is around the world, although they are still relied upon in Tunisia (63%) and Bahrain (48%), perhaps as a second or third connection for those in Bahrain.

Type of Internet Connection at Home

Type of Internet Connection at Home (%)



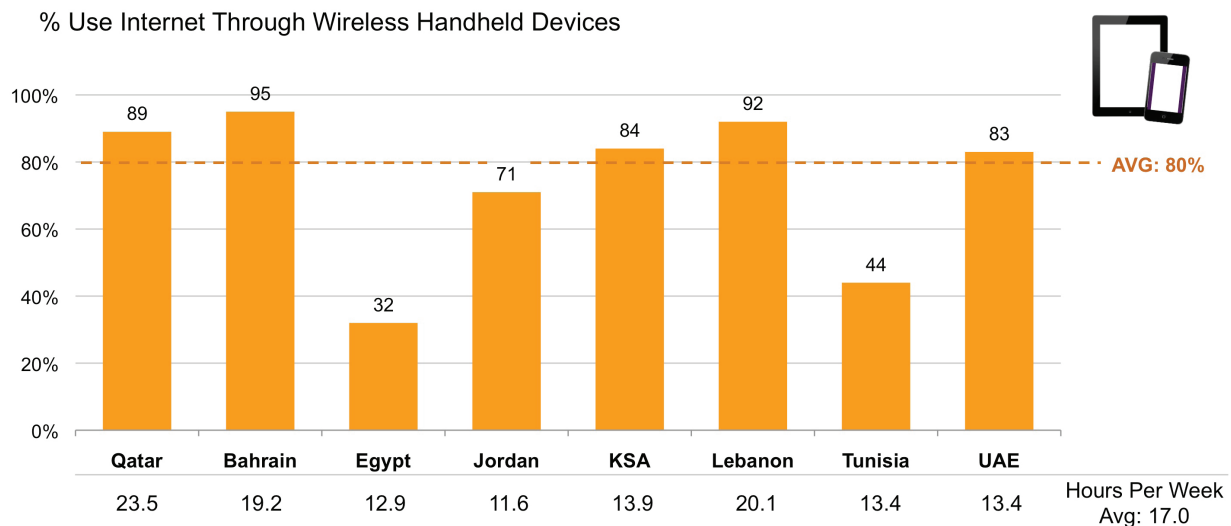
BASE: HAVE INTERNET AT HOME
Q25. What type of Internet connection do you have at home?

Wireless devices

Almost all internet users are wireless. Eight in ten (80%) internet users use wireless devices, such as mobile phones and laptops, a highly common form of access in all countries except Egypt (32% of internet users have wireless devices) and Tunisia (44%).

Time spent on wireless devices varies substantially by country, at around 17 hours per week – as high as 23 hours per week on average in Qatar, but only 12 hours (even so, nearly 2 hours a day) in Jordan.

Use of Wireless Handheld Devices



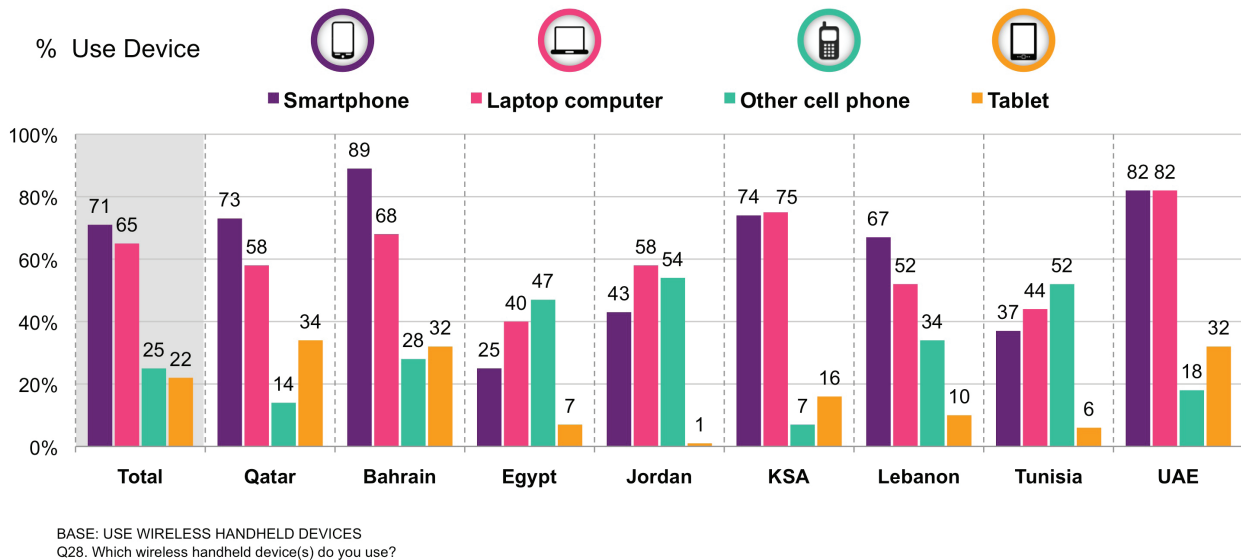
BASE: INTERNET USER
Q26. Do you use the Internet through wireless handheld devices such as a mobile phone or tablet?
BASE: WIRELESS HAND-HELD DEVICE USER
Q27. How many hours per week do you use the Internet through wireless handheld device(s)?

The most common wireless devices are smartphones (71%) and laptops (65%). Access by smartphone is the norm in Bahrain (89%) and UAE (82%), much less so in Tunisia (37%), the other extreme. Besides smartphones and laptops, tablets such as the iPad (used by 22% of adults) and other cell phones (25%) are the only other devices used by more than a very small minority. Tablet use is highest in Qatar at 34% of internet users. MP3 players and e-readers are hardly used at all.

In Egypt, Jordan and Tunisia, use of regular cell phones (non-smartphones) is much higher than elsewhere, and also higher than the use of smartphones in those three countries.

The choices of wireless devices are consistent at all ages of users, and also among men and women.

Wireless Devices Used



Survey results:

Social networking

Introduction

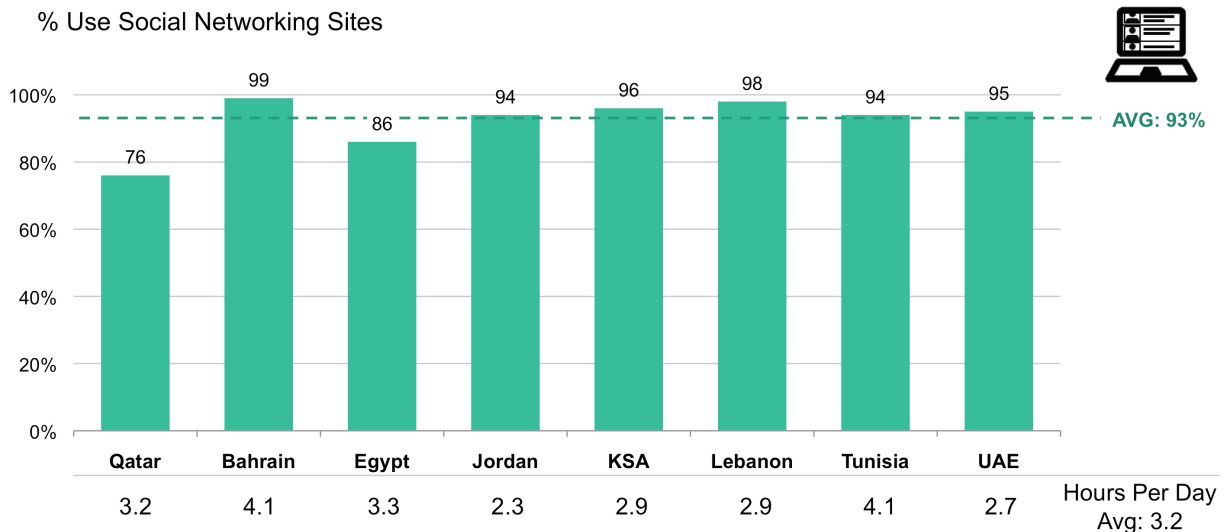
This chapter details online social networking, both its frequency and duration (in hours per day), and key sites visited.

Social networking is pervasive throughout the Arab countries surveyed, with more than nine in ten (93%) internet users saying they visit social networking sites. In fact, a substantial majority of internet users (60%) claim that they visit social networking or video-sharing websites on a daily basis. Daily social networking is common in all eight countries, with stronger intensity reported in Tunisia (77% at least daily among internet users) and Jordan (72%). Only in Qatar (45%) are daily visits to social networking sites reported by fewer than half of respondents.

Time spent on social networking sites is substantial, averaging 2 to 4 hours a day in all eight countries.

Facebook is ubiquitous throughout the region, used by over nine of ten (94%) social network users in each of the eight countries. Although dominance of Facebook is seen in each of the eight countries, its nearest competitor, Twitter, is used by about half (51%) of respondents. The mix of social networking sites used varies by country – in the context of the very strong presence of Facebook overall – with Twitter being especially strong in Bahrain (72% use), Saudi Arabia (65%) and UAE (58%).

Use of Social Networking Sites

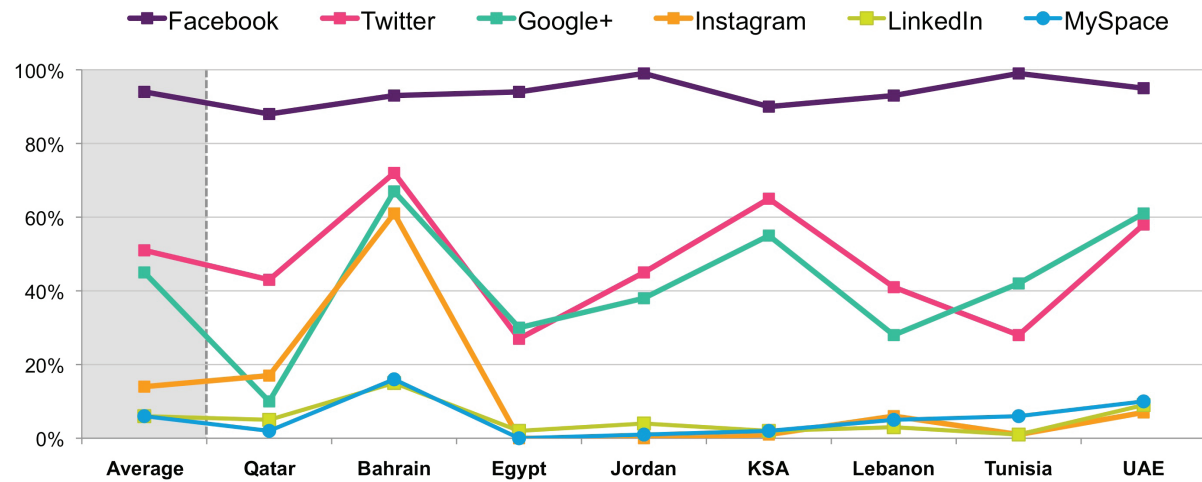


BASE: INTERNET USERS

Q35. How much time in a typical day do you spend using social networking sites? (Total minus 'Do not use social networking sites/Don't know/Refused')

Social Networking Sites Used

Sites Used (%)



BASE: USE SOCIAL NETWORKING SITES
Q36. Which of the following social networking sites do you use?

The only other social networking site of consequence besides Facebook and Twitter is Google+, used by nearly half (45%) of those using social networking sites. Use of Google+ is strongest in Bahrain (67%), UAE (61%) and Saudi Arabia (42%).

Some social networking sites familiar in the West have yet to take hold in the Arab countries surveyed here. For example, Instagram has only gained traction in Bahrain (61% use it) and to some extent Qatar (17%). Devotion to LinkedIn and MySpace (6% each), Flickr (4%) and Tumblr (3%) is even rarer.

The relative popularity of the leading social networking sites holds true for all age groups and for both men and women. Among those who use social networks, Facebook is as popular with those 45 and over as with the under-25's, as it is with men and women.

Survey results:

Freedom, privacy and regulation on the internet

Introduction

Participants were asked to report their levels of confidence and security in doing various things online. This chapter measures attitudes toward the internet as a medium for expressing personal ideas and opinions frankly, including politically sensitive perspectives. The chapter also assesses views on, and awareness of, laws and regulations that affect internet use in the eight countries covered in the study. Where noted, the wording of select statements was altered in Qatar at the request of the Qatar Statistics Authority.

Freedom and privacy on the internet

Three-quarters (76%) of internet users in the study agree with the statement that “when I need information, the first place I go is the internet.” This tendency was particularly strong in Bahrain (84%) and somewhat strong in Egypt (69%) and Tunisia (66%).

This trend implies some confidence that the internet is in some general way reliable, at least for matters of fact; more complex, possibly, is the question of opinions expressed.

Two-thirds (68%) of adults agree with the statement that, “In general, people are responsible with regard to the opinions they express on the internet.” Most confident about the integrity of opinions expressed on the internet are those in Saudi Arabia (85% say so), but the majority (60% or more) in all countries accept the integrity of expressed opinions.

There is solid support for freedom of expression on the internet in general. Nearly two-thirds (61%) of adults in the region agree “It is okay for people to express their ideas on the internet, even if they are unpopular.” This feeling is broadly consistent in all eight countries, and particularly so in Saudi Arabia (where 76% agree with the statement). Only in Egypt do fewer than half agree (48%).

Regulation of the internet

While people in the region may agree with freedom of expression on the internet in the abstract, practically speaking many support greater regulation. Half (51%) of the participants in the study believe there is not enough awareness of the “laws, regulations and moralities that control one’s activities on the internet”, and, perhaps consequently, half (50%) also feel the internet in their country should be more tightly regulated than it is now.

There are variations by country, however. Nearly two-thirds (62%) of those in Saudi Arabia and Lebanon (64%) support tighter regulation of the internet, as do a majority of residents of Qatar (57%) and Tunisia (52%). In other countries, substantial minorities hold these views.

Perhaps even more telling, only 16% overall disagree that the internet in their country should be more tightly regulated, ranging from a low of 7% disagreement in Egypt to a high of just 25% disagreeing in Bahrain. These low levels of disagreement suggest that there is no strong opposition to internet regulation in any of the eight countries under study.

The internet and politics

Generally, there is not much confidence in open expression of opinions about politics on the internet. Fewer than half (47%) of adults agree with the assertion that “On the internet, it is safe to say whatever one thinks about political affairs [‘public issues’ in Qatar].” This constraining attitude is remarkably consistent in each of the eight countries: only in Saudi Arabia, where two-thirds (64%) agree with the statement, is there a more sanguine appraisal.

Personalizing this general concern reflects overall caution. A similarly low proportion of adults in the region (44%) accept that “I feel comfortable saying what I think about politics [‘public issues’ in Qatar].”

Perhaps, more remarkable than the expressed caution of openly expressing ideas on the internet is the real doubt that people *should be able to do so*. Fewer than half of adults (46%) agree that “People should be free to criticize governments [‘powerful institutions’, in Qatar] on the internet.” Nowhere is this assertion strongly countered. In fact, nearly one-quarter (23%) actively oppose the freedom to criticize governments [powerful institutions] on the internet. Those in Bahrain (40% disagree), Jordan (29%) and UAE (27%) are the most likely to disagree that people should be able to criticize governments online.

The generally expressed concern – or, perhaps, caution – about freedom of expression on the internet does not translate into worrying that governments [‘powerful institutions’, in Qatar] are actively checking their online activity. All the same, over a third (38%) of adults agree with the statement “I am worried about governments [‘powerful institutions’ in Qatar] checking what I do online.” The implied concern is fairly consistent in all countries covered, but more acute in Saudi Arabia, where a majority (53%) express this concern.

On the other hand, an equal third (36%) are not worried about governments [powerful institutions] checking their online activity. Those in Egypt (53%), Bahrain (49%), Lebanon (46%) and Tunisia (45%) are the most likely to disagree that they are worried about governments checking what they do online.

Perceptions about the internet by age

Generally, younger internet users are a little more trusting of the medium than their older peers, both in terms of opinions expressed online and the likelihood of the internet being a first port of call for information. The difference between age groups is not stark, but is certainly noticeable in perceptions of the “permission” to air one’s views on the internet on matters that may be considered sensitive. Thus, half of those under 25 agree that “it is safe to say whatever one thinks about political affairs [‘public issues’ in Qatar]” on the internet, whereas fewer (41%) respondents 45 and older agree. Additionally, younger adults are more likely to advocate for political freedom online, with nearly half (48%) reporting “People should be free to criticize governments [‘powerful institutions’, in Qatar] on the internet,” compared with 41% of those 45 and older.

Paradoxically, however, the younger audience is more likely to advocate for tighter regulations than their older peers. More than half (55%) of those under 25 agree the internet in their country should be more tightly regulated, compared with 45% of those 45 and older.

Expressing Opinions & Regulation of the Internet - Agree with Statement -

% Strongly Agree/Agree with Statements	Average	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
When I need information, the first place I go to is the internet.*	76%	79%	84%	69%	76%	78%	72%	66%	77%
In general, people are responsible with regard to the opinions they express on the internet.	68%	60%	72%	64%	60%	85%	68%	60%	73%
It is okay for people to express their ideas on the Internet, even if they are unpopular.	61%	61%	63%	48%	57%	76%	61%	57%	65%
There is not enough awareness of the laws, regulations and moralities that control the one's activities on the internet.	51%	52%	50%	38%	43%	68%	65%	46%	47%
The Internet in my country should be more tightly regulated than it is now.	50%	57%	44%	42%	42%	62%	64%	52%	42%

BASE: ALL RESPONDENTS; *ASKED INTERNET USERS
Q38. To what extent do you agree or disagree with the following statement?
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

Expressing Opinions & Regulation of the Internet - Disagree with Statement -

% Strongly Disagree/Disagree with Statements	Average	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
When I need information, the first place I go to is the internet.*	9%	8%	7%	17%	8%	7%	14%	14%	4%
In general, people are responsible with regard to the opinions they express on the internet.	10%	15%	11%	4%	9%	4%	11%	16%	5%
It is okay for people to express their ideas on the Internet, even if they are unpopular.	12%	17%	18%	11%	11%	6%	14%	12%	10%
There is not enough awareness of the laws, regulations and moralities that control the one's activities on the internet.	14%	18%	19%	9%	15%	7%	13%	18%	16%
The Internet in my country should be more tightly regulated than it is now.	16%	21%	25%	7%	21%	9%	11%	15%	19%

BASE: ALL RESPONDENTS; *ASKED INTERNET USERS
Q38. To what extent do you agree or disagree with the following statement?
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

Discussing Politics on the Internet - Agree with Statement -

% Strongly Agree/Agree with Statements	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
On Internet, it is safe to say whatever one thinks about [political affairs/ (Qatar) public issues].	47%	46%	38%	44%	45%	64%	47%	47%	47%
People should be free to criticize [governments/ (Qatar) powerful institutions] on the Internet.	46%	52%	38%	46%	35%	55%	52%	47%	41%
I am worried about [governments/ (Qatar) powerful institutions] checking what I do online.*	38%	38%	31%	29%	43%	53%	32%	30%	38%
In general, I feel comfortable saying what I think about [politics/(Qatar) public issues].	44%	54%	40%	43%	38%	54%	42%	45%	38%
I am worried about companies checking what I do online.*	36%	39%	30%	31%	38%	50%	27%	32%	35%

BASE: ALL RESPONDENTS; *ASKED INTERNET USERS
Q38. To what extent do you agree or disagree with the following statement?
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

Discussing Politics on the Internet - Disagree with Statement -

% Strongly Disagree/Disagree with Statements	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
On Internet, it is safe to say whatever one thinks about [political affairs/ (Qatar) public issues].	19%	25%	35%	8%	17%	12%	22%	19%	18%
People should be free to criticize [governments/ (Qatar) powerful institutions] on the Internet.	23%	20%	40%	9%	29%	19%	20%	20%	27%
I am worried about [governments/ (Qatar) powerful institutions] checking what I do online.*	36%	36%	49%	53%	25%	26%	46%	45%	24%
In general, I feel comfortable saying what I think about [politics/(Qatar) public issues].	22%	17%	37%	11%	24%	18%	27%	22%	16%
I am worried about companies checking what I do online.*	39%	37%	54%	54%	38%	25%	50%	45%	28%

BASE: ALL RESPONDENTS; *ASKED INTERNET USERS
Q38. To what extent do you agree or disagree with the following statement?
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

Survey results:

The internet and political influence

Introduction

Developing themes in the previous section, this chapter examines perceptions of the impact the internet has had or could have on aspects of the political process. Specifically, the chapter summarizes the degree of agreement/disagreement with select statements about the internet's effects on changes in potential political influence, both in terms of having more say about government policies and in public officials paying more attention to what people think. As in the previous chapter, where noted the wording of select statements was altered in Qatar at the request of the Qatar Statistics Authority.

Understanding the nature of politics

In a context of optimism about the internet as a source of learning, including about politics, there is much less conviction that this ability to learn translates into having more say about government policies, or in exercising more political influence. And there is no strong sense the internet will itself create an ambience in which public officials are likely to 'care more' about what people think.

While the internet is perceived to provide a real platform for learning and communicating about matters in the consumer sector, it is not perceived as an instrument that allows more effective interaction with government.

The majority agrees that the internet can be used effectively for learning about new "technological developments" (87% of adults agree that this is so) and "life matters that help you better handle your life" (72%), as well as make "more informed choices about products and brands" (69%) and "provide opinions about products and services" (65%).

In contrast, just under half (49%) of adults agree that the internet will allow "people like you to have more say about government policies ['public issues' in Qatar]", and the same number (48%) believe that people like them "can have more political influence ['influence on society' in Qatar]" attributable to the internet. Not a ringing endorsement of the internet maybe, but not a surprising attitude in view of the skepticism expressed of the internet being likely to make public officials ['institutional leaders' in Qatar] "care more about what people like you think." Fewer than half (45%) of adults agree with this sentiment. About one-fourth

overall expressly disagree that people can have more say about government policies [public issues] (23%), can have more political influence [influence on society] (24%) or that public officials [institutional leaders] will care more what they think (26%) because of their activity on the internet.

About two-thirds (60%) of adults agree that the internet fosters greater understanding of politics ['powerful institutions' in Qatar], a sentiment more clearly felt in Jordan (73%) and Saudi Arabia (71%) than elsewhere, as in Tunisia (51%) or Bahrain (50%).

Optimism about the internet in general, coupled with real caution about its potential benefits on the political process, are applicable – and similarly expressed – throughout countries covered in the study. In Saudi Arabia, however, there is generally more optimism that the internet benefits political dialogue between the government and the population. About seven in ten (71%) of those in Saudi Arabia agree that the internet will enable them to "better understand the nature of politics," and about two-thirds (63%) also believe that the internet will enable them to have more political influence. Those in Saudi Arabia also feel (60% say so) that the internet will lead public officials to care more about what they think. In comparison, Lebanese are more pessimistic than others: only about a third (37%) of Lebanese believe the internet will allow more political influence, and only a quarter (26%) senses that public officials will care more about what people think as a result of it.

The Internet and Learning

% Strongly Agree/Agree
with Statements

	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
One can learn about new technological developments in the world	87%	85%	85%	86%	91%	89%	92%	84%	86%
One can acquire more knowledge on life matters that help you better handle your life	72%	72%	70%	78%	65%	87%	73%	63%	66%
You will be able to make more informed choices on products and brands to use	69%	63%	64%	60%	70%	86%	66%	61%	73%
You can communicate and give your opinions towards different products and services available to you	65%	63%	61%	54%	62%	78%	63%	58%	68%

BASE: INTERNET USERS

Q31. Please tell me how much you agree or disagree with each of these statements.
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.
Do you think by using the internet...

The Internet and Politics - Agree with Statement -

% Strongly Agree/Agree
with Statements

	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
People like you can better understand the nature of [politics/ (Qatar) powerful institutions].	60%	60%	50%	68%	73%	71%	56%	51%	60%
People like you can have more say about [government policies/ (Qatar) public issues].	49%	57%	37%	61%	52%	60%	44%	42%	45%
People like you can have more [political influence/(Qatar) influence on society].	48%	58%	41%	59%	47%	63%	37%	40%	42%
[Public officials/(Qatar) Institutional leaders] will care more what people like you think.	45%	50%	41%	40%	46%	60%	26%	36%	48%

BASE: INTERNET USERS

Q31. Please tell me how much you agree or disagree with each of these statements.
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.
Do you think by using the internet...

The Internet and Politics - Disagree with Statement -

% Strongly Disagree/Disagree with Statements	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
People like you can better understand the nature of [politics/ (Qatar) powerful institutions].	15%	10%	28%	12%	8%	7%	18%	21%	12%
People like you can have more say about [government policies/ (Qatar) public issues].	23%	14%	39%	17%	19%	14%	30%	29%	21%
People like you can have more [political influence/(Qatar) influence on society].	24%	14%	36%	23%	18%	12%	37%	34%	21%
[Public officials/(Qatar) Institutional leaders] will care more what people like you think.	26%	17%	30%	37%	23%	15%	49%	38%	19%

BASE: INTERNET USERS
Q31. Please tell me how much you agree or disagree with each of these statements.
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.
Do you think by using the internet...

Understanding the nature of politics by age and gender

Opinions expressed on the interplay between the internet and its users are consistent among all age groups and between men and women. Younger respondents are no more (or less) sensitive to expressing their opinions on the internet, nor do they feel any more than their elders that governments will listen more closely to what they say because of the internet.

Survey results:

Personal connections on the internet

Introduction

As context for understanding the effects of the internet on everyday behavior, this chapter explores inter-personal connections. The chapter focuses on socializing with family and friends, and the extent to which access to the internet impacts these traditional relationships as well as interactions with others who have common interests.

Context: socializing with family and friends

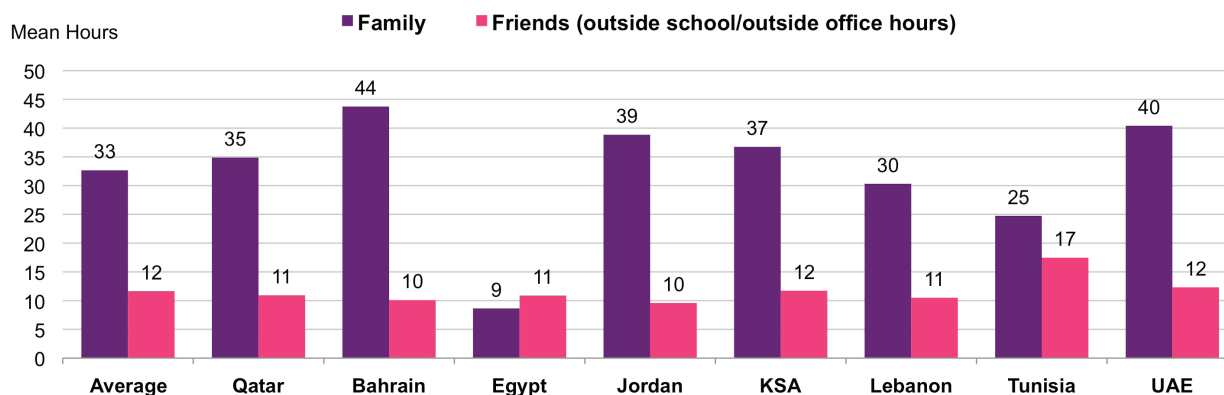
Nearly everybody (96%) spends considerable time each week socializing with family, 33 hours on average. The amount of time spent with family varies considerably by country, with Egypt being a conspicuous exception from typical behavior. Egyptians spend around 9 hours per week with family members. Those in Bahrain, in contrast, spend five times as much time (44 hours per week on average) socializing

with their families than Egyptians, and about 10 hours per week more than respondents in other countries.

Respondents spend less time (12 hours per week) socializing with friends than family. Time spent with friends is broadly consistent in all countries, with Tunisia a little higher than elsewhere (17 hours per week).

Socializing Face-to-Face

Time Spent Socializing with Friends and Family in a Typical Week



BASE: ALL RESPONDENTS
Q12 /13. During a typical week, how many hours or minutes do you spend socializing face-to-face with...?

Socializing and gender

Women spend more time than men with family and men spend more time than women socializing with friends. In countries covered by the study, women spend about 36 hours per week socializing with family, about six hours more than men. On the other hand, men spend more time with friends (13 hours per week typically) as do women (10 hours).

The contrast between male and female social patterns with family is particularly marked in Qatar, Bahrain and Jordan where women usually spend about 9 to 10 hours per week more than

men socializing with family. Egypt stands out distinctly from all other countries, in that men and women spend about the same (low amount of) time socializing with family – about 9 hours a week. In Qatar and Jordan, men are likely to be with friends – about six hours more per week than are women in those countries.

Socializing and age

Time spent socializing with family and friends is not greatly affected by age. (Indeed, in the case of family socializing, a mix of ages would be expected at a typical family gathering.) Generally speaking, those 45 and older are likely to socialize with family a few more hours each week than are those under that age, while younger people – those under 25 – are with friends a little longer each week.

Socializing and the impact of the internet

The internet is having considerable impact on familial and social contact. Internet users in all countries recognize that using the internet has increased their contact with all those whom they are likely to contact to begin with. The impact of the internet is most noticeable in contact with friends (70% feel this way), but almost as much with those who share hobbies and recreational activities (60%) and other family members (59%). Overall, the effect of the internet on contact with others is more notable in Bahrain, Jordan, Saudi Arabia and UAE than in the other countries.

The increase in contact with friends as a result of using the internet is the single most noticeable change in all countries covered in the study, but with the increase slightly less so in Tunisia (61%), Egypt (52%) and Lebanon (58%) than in Bahrain (79%), Saudi Arabia (77%), UAE (74%) and Jordan (73%).

The increase in contact attributable to the internet is more noticeable among friends (70% agree that the internet increase contact) than family (59%).

A strong minority says the internet has increased their contact with those with similar political views ['views on society' in Qatar] (49%) or religious beliefs (47%).

The impact of the internet on socializing is broadly consistent among age groups, and also for men and women. Younger internet users are somewhat more likely than their elders to enjoy increased contact with friends as a result of the internet.

Impact of the Internet on Contact with Others

% Internet Usage Increases Contact
(Rated 4, 5 on 5 point scale)

	Average	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
Friends	70%	65%	79%	52%	73%	77%	58%	61%	74%
People who share your hobbies/recreational activities	60%	48%	71%	53%	71%	70%	47%	50%	61%
Family	59%	60%	76%	43%	63%	59%	47%	36%	68%
People in your profession	53%	54%	59%	38%	58%	64%	38%	40%	55%
People who share your [political views/(Qatar) views on society]	49%	48%	51%	52%	51%	69%	34%	41%	40%
People who share your religious beliefs	47%	46%	54%	44%	44%	58%	30%	40%	45%

BASE: INTERNET USERS

Q30. Does your use of the Internet increase or decrease your contact with the following groups online and offline? Use a scale of 1 to 5 where "1" means greatly decreased, "5" means greatly increased, and, of course, "3" means your contact with these groups has remained the same.

Impact of the Internet on Contact with Others by Age

% Internet Usage Increases Contact

	Qatar		Bahrain		Egypt		Jordan		KSA		Lebanon		Tunisia		UAE	
	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+	18-24	45+
Friends	67%	57%	76%	77%	68%	37%	81%	63%	80%	66%	63%	57%	60%	49%	76%	63%
People who share your hobbies/recreational activities	54%	44%	71%	68%	66%	46%	77%	54%	73%	65%	55%	46%	49%	42%	57%	58%
Family	52%	57%	76%	79%	45%	45%	64%	52%	55%	56%	49%	62%	27%	26%	62%	60%
People in your profession	47%	48%	52%	53%	38%	15%	59%	51%	66%	52%	38%	39%	29%	38%	65%	45%
People who share your [political views/(Qatar) views on society]	48%	38%	48%	55%	52%	53%	51%	48%	67%	64%	37%	32%	40%	44%	36%	44%
People who share your religious beliefs	48%	42%	48%	58%	52%	37%	45%	40%	56%	52%	31%	30%	35%	40%	44%	44%

BASE: INTERNET USERS

Q30. Does your use of the Internet increase or decrease your contact with the following groups online and offline? Use a scale of 1 to 5 where "1" means greatly decreased, "5" means greatly increased, and, of course, "3" means your contact with these groups has remained the same.

Survey results:

Internet activity

Introduction

This chapter highlights internet activity by focusing on what respondents do online in a typical day.

Daily internet activity for communications

Respondents were asked how often they use the internet for various specific purposes. Among the most popular activities are personal online communications such as instant messaging (by 61% of adults at least daily), checking e-mail (57%) and using the phone online (42%).

Consistent with a strong presence on social networking sites, a notable minority participate in chat rooms (46%), comment on blogs (37%), post messages on discussion boards (32%), update their status (29%), post pictures (28%), read blogs (28%) and work on their own blog (26%) – on a daily basis.

Each activity varies in its frequency of usage by country, with less daily internet activity overall in Qatar, Egypt and Jordan.

Daily Internet Activity - Communication

% Use Internet Daily for...	Average	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
Do instant messaging	61%	48%	71%	20%	39%	65%	78%	66%	67%
Check your e-mail	57%	65%	67%	25%	19%	58%	65%	55%	65%
Participate in chat rooms	46%	19%	56%	24%	49%	60%	69%	44%	40%
Make or receive phone calls over the Internet	42%	36%	56%	10%	14%	52%	59%	50%	33%
Send attachments with your e-mail	38%	39%	48%	13%	11%	44%	41%	35%	40%
Comment on other people's blogs, message boards, etc.	37%	22%	50%	18%	41%	39%	43%	40%	35%
Post messages or comments on discussion boards	32%	24%	43%	16%	24%	39%	37%	38%	26%
Update your status, such as what are you doing now	29%	29%	33%	13%	18%	27%	37%	29%	33%
Post photos or pictures on the Internet	28%	20%	41%	26%	20%	28%	26%	36%	22%
Work on your Blog	26%	19%	24%	11%	17%	47%	35%	16%	25%
Upload music videos	26%	12%	24%	17%	20%	44%	19%	48%	18%

BASE: INTERNET USERS

Q32. Now I'd like you to think about the different ways people interact and communicate with each other in their everyday lives, like keeping in touch with people. How often do you use the Internet for the following purposes?

Online information

While nearly half (49%) of internet users in the region are online daily looking for news, fewer seek information about health (23%) or work and travel (9% each) as regularly. However, the majority have searched the internet *at least some point in time* for news (89%), health information (85%) and travel information (65%), but fewer have ever looked for work online (45%).

Daily Online Activity - Information

% Use Internet Daily for...	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
Look for news-local, national, international	49%	49%	63%	56%	38%	50%	34%	58%	46%
Look for jokes, cartoons, or other humorous content	30%	20%	34%	30%	21%	38%	29%	51%	22%
Read web-logs (Blogs)	28%	23%	31%	16%	21%	35%	36%	33%	22%
Look for health information	23%	26%	28%	28%	13%	26%	19%	29%	17%
Look for jobs, work	9%	11%	7%	5%	3%	13%	8%	18%	7%
Look for travel information	9%	12%	8%	7%	2%	13%	6%	14%	6%

BASE: INTERNET USERS

Q33. Some people often look up information on the Internet as they go about their daily lives – things like news, sports scores and movie times – others don't. How frequently do you use the Internet for the following purposes?

Online entertainment

Six in ten (60%) adults in the countries covered in the study visit social networking or video-sharing websites at least once a day – more in Tunisia (77%) and Jordan (72%), but fewer in Qatar (45%). A majority (56%) of adults also surf or browse the web each day. Other ‘entertainment’ activities are not so often engaged in: even so, a third (34%) of adults download or listen to music or look for humorous content (30%) at least once a day, and about a quarter play games (27% daily), download or watch videos (23%), or look at religious or spiritual sites (21%).

Daily Internet Activity - Entertainment

% Use Internet Daily for...	Total	Qatar	Bahrain	Egypt	Jordan	KSA	Lebanon	Tunisia	UAE
Visit social networking or video-sharing websites	60%	45%	60%	60%	72%	58%	60%	77%	60%
Surf or browse the Web	56%	57%	60%	57%	55%	52%	51%	64%	57%
Download or listen to music	34%	25%	26%	32%	30%	42%	31%	62%	27%
Play games	27%	15%	35%	28%	31%	26%	29%	37%	22%
Download or watch videos	23%	18%	22%	26%	9%	32%	20%	42%	18%
Look at religious or spiritual sites	21%	22%	32%	35%	10%	29%	8%	22%	13%
Listen to a radio station online	12%	8%	15%	8%	5%	14%	9%	24%	12%

BASE: INTERNET USERS

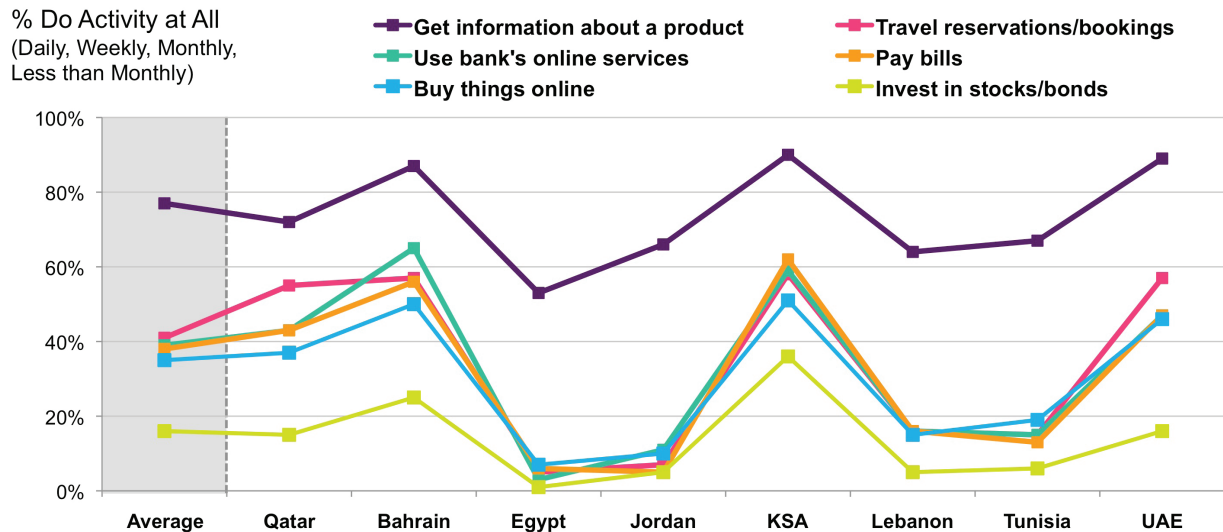
Q34. Now I'd like you to think about the routine things you do for personal entertainment like playing games or listening to music. How frequently do you use the Internet for the following purposes?

Online transactions

Over three-quarters (77%) of internet users in the survey search for information about products online. This activity is particularly common in UAE (90%), Saudi Arabia (90%), and Bahrain (87%). By contrast, only 57% of Egyptian internet users gather product information online.

However, online transactions are far less common. Fewer than half of internet users use online banking services (39%), make travel reservations (41%), pay bills (38%) or purchase items (35%) online at all (much less on a daily basis), and even fewer are investing online (16%) at all. Online transactions of all sorts are much rarer in Lebanon and Tunisia, and especially in Egypt and Jordan, than they are in the Gulf States.

Online Transactions

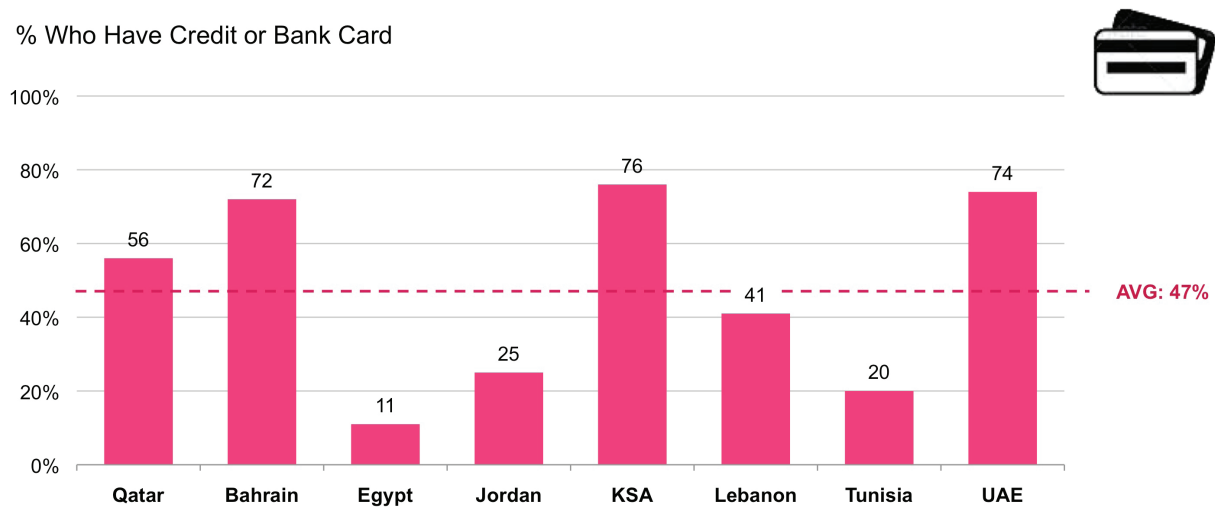


BASE: INTERNET USERS
Q36A. Now I'd like you to think about different transactions people do in their everyday lives like banking or shopping.
How frequently do you use the Internet for the following purposes?

Bank and credit cards

Fewer than half (47%) of adults included in the survey have a bank card or credit card, although the incidence varies substantially by country. About three-quarters of those in Saudi Arabia (76%), UAE (74%) and Bahrain (72%) have credit or bank cards, whereas only a quarter of Jordanians (25%), 20% of Tunisians and one in ten Egyptians (11%) do. It may be that people are not able to carry out transactions online if they do not have the means of payment to do so.

Bank and Credit Card Ownership

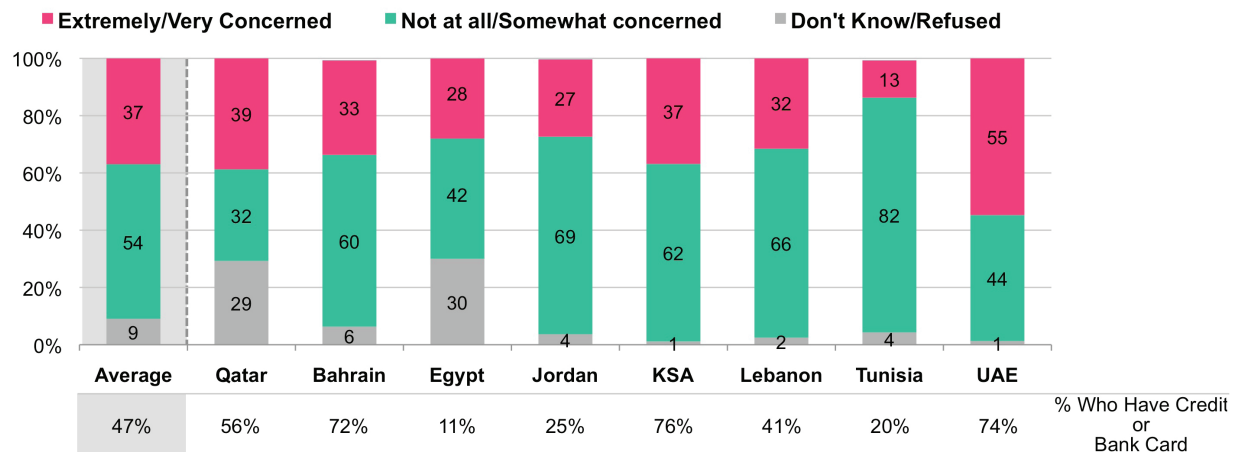


BASE: ALL RESPONDENTS
Q29. How concerned would you be about the security of your credit or bankcard information when or if you ever bought something online? Would you be...?

That said, a majority (54%) of holders of bank and credit cards are not especially concerned about the security of their cards when or if they were to use them to purchase things or make other transactions online. (A quarter (26%), say they are “not at all concerned.”) Particularly sanguine about card security are Tunisians (62% of card holders there are “not at all concerned” about security). In contrast, a majority (55%) of residents of UAE express concern about card security (28% are extremely concerned), as are those in Qatar (29% are extremely concerned).

Concern about Security of Financial Information Online

Level of Security Concern When Purchasing Online
Among Those with a Credit Card or Bank Card



BASE: RESPONDENTS WHO HAVE CREDIT CARD OR BANK CARD

Q29. How concerned would you be about the security of your credit or bankcard information when or if you ever bought something online? Would you be...?

Survey results:

State of the nation

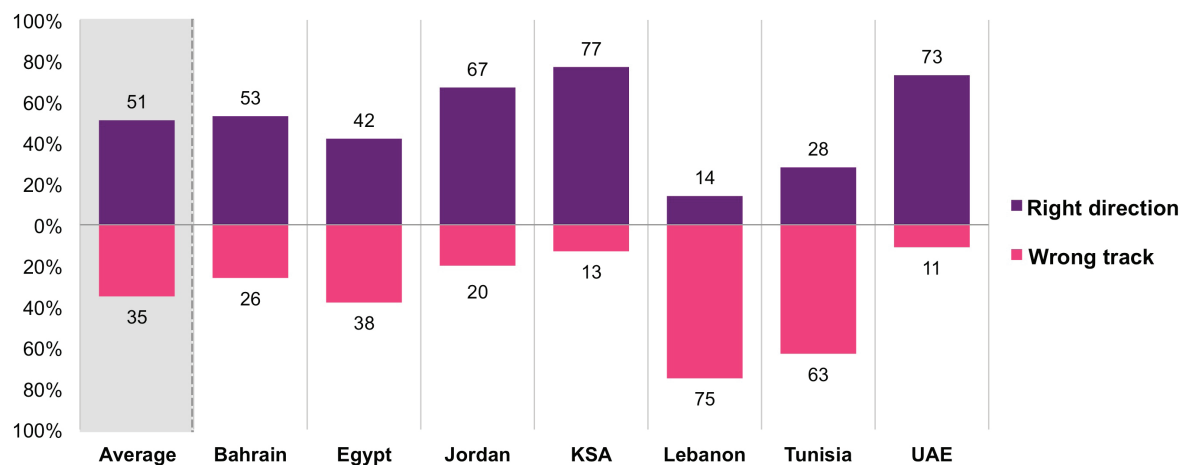
Introduction

This chapter explores the general sentiment in each nation regarding optimism/pessimism about the direction of the country (right direction/wrong track) and one's own future. The "state of the nation" question was not asked in Qatar at the request of the Qatar Statistics Authority.

Taken as a whole, the geographic region covered in this study includes broad opinions on nations' trajectories. When asked if their country was "generally headed in the right direction," a bare majority (51%) of respondents felt this to be the case, but a third (35%) felt they were on the wrong track. This lukewarm sentiment about the state of the nation is not echoed everywhere. In Saudi Arabia, for example, the opinion on the general direction is more positive: over three-quarters (77%) of adults there feel they are heading in the right direction. A similar picture applies to UAE (73% say "right direction"). Other countries are mixed, but in Tunisia only a quarter (28%) of adults are confident in their country's direction, and in Lebanon the view is even bleaker. Only 14% of Lebanese sense their country is headed in the right direction.

State of the Nation

Direction Country Is Headed (%)



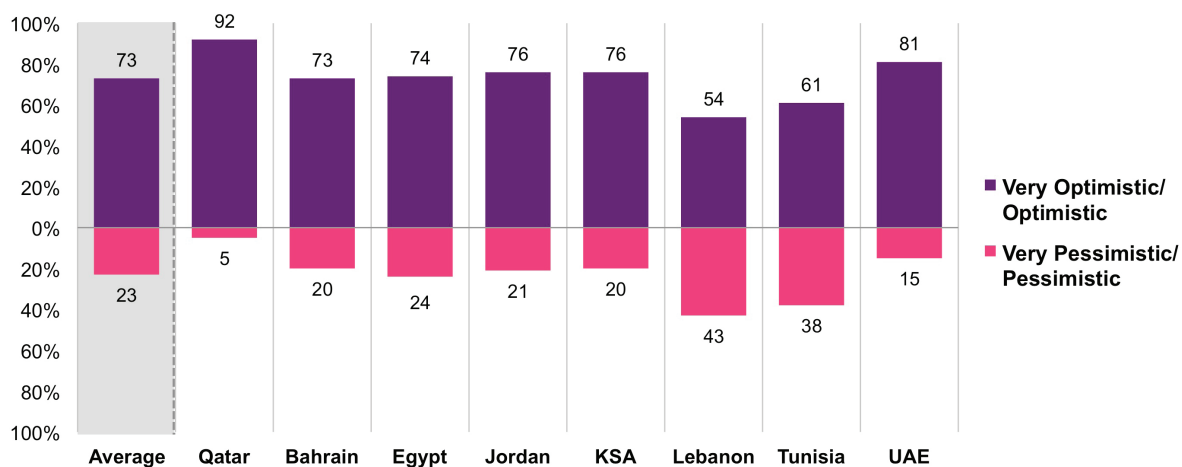
BASE: ALL RESPONDENTS EXCEPT QATAR

Q48. All in all, do you think things in your country are generally headed in the right direction, or do you feel that things are off on the wrong track?

When asked to personalize their views, nearly three-quarters (73%) of adults in the region are optimistic about their own futures, a sentiment reflected in all countries except Lebanon and Tunisia, where substantial minorities are pessimistic (43% and 38% pessimistic, respectively).

Optimism for Personal Future

Sentiment Toward Future (%)



BASE: ALL RESPONDENTS
Q49. How optimistic or pessimistic are you about your own future?



Highlighting Qatar

Introduction

Among many of the Arab countries covered in this survey, Qatar is unusual in the mix of its population – the number of expatriate residents in Qatar far outnumbers the native citizenry in the country.

This chapter provides some insights into the study's findings as they pertain specifically to residents of Qatar. The main body of the report includes participants from Qatar, and points out issues on which Qatar (and other specific countries) stand out in some way, as well as examines differences by age and gender in Qatar and other countries. This chapter takes the analysis a step further by examining some of the key topics covered in the study by the ethnicity and category of residency in Qatar, not least as a result of its population's make-up.

Sub-groups in the Qatar population considered in this section are Qatari nationals, Arab expatriates, Asian expatriates and Westerners.

Media sources used

Television is the most popular traditional medium in Qatar, but only slightly exceeds the internet. Nine in ten adults watch TV, but nearly as many (86%) use the internet. Internet use is fairly consistent among all ethnic sub-groups of the population; it is highest among Arab expatriates (90%) and lower among Westerners (81%), with Asian expatriates (86%) and Qatari nationals (85%) at the average.

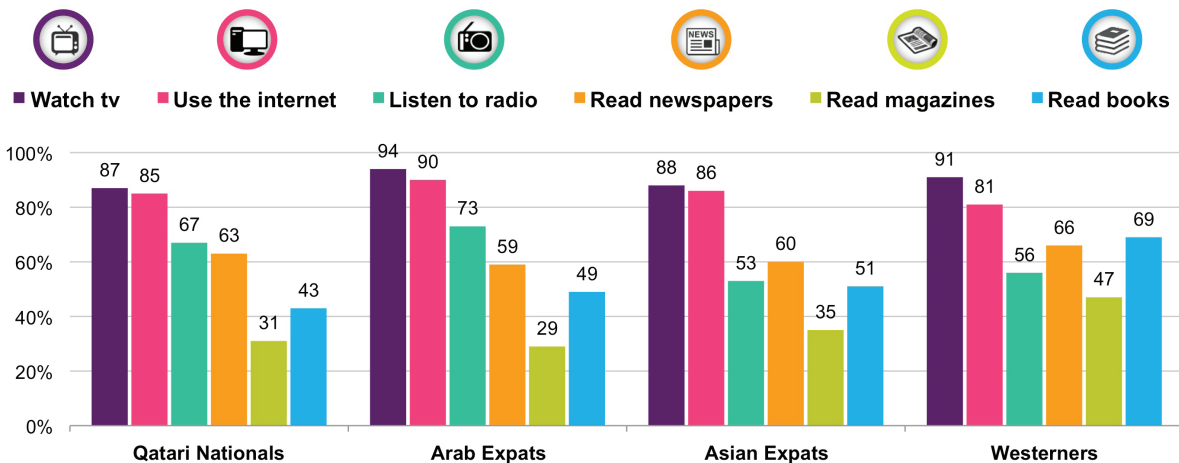
About two-thirds of the residents of Qatar (64%) listen to radio regularly, and Arab expatriates are evidently the most enthusiastic radio listeners in the country – three-quarters (73%) of them listen compared to only just over half of Asian expatriates (53%) and Westerners (56%), and 67% of Nationals.

Reading newspapers is also popular, with an overall incidence of 62%, roughly the same as for radio (64%). Newspapers enjoy similar popularity among all sub-groups of the population.

Although reading magazines (34%) and books (50%) is less common than reading newspapers, its overall low incidence masks a concentration of readers among Westerners. Over two-thirds (69%) of Westerners read books, compared with half of Asian (51%) and Arab (49%) expatriates, and even fewer (43%) Qatari nationals.

Use of Media Sources – Qatar Only

% Use Media Source



BASE: ALL QATAR RESPONDENTS

Q11. During a typical week, how many hours do you spend on the following activities not online? (Total minus 'Do not spend time doing this activity/Don't know/Refused')

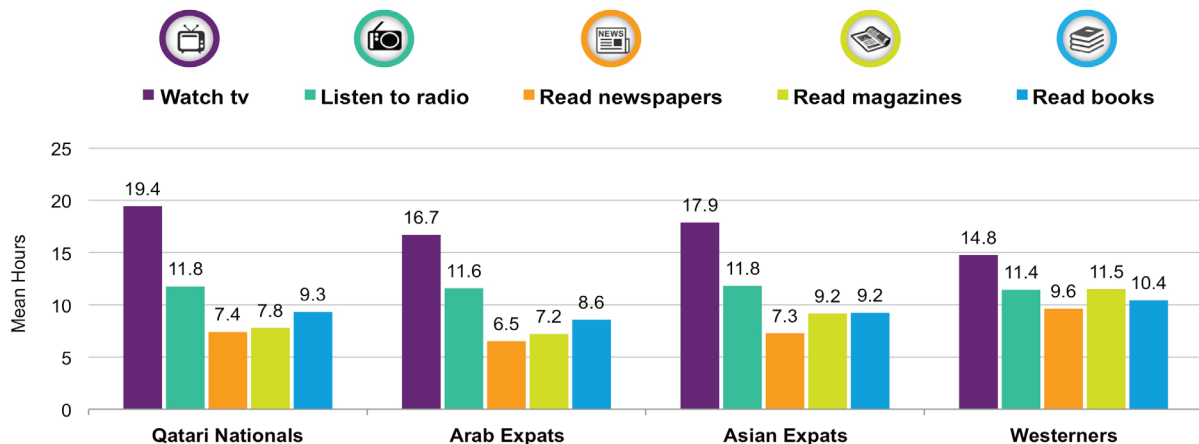
Q14. Do you currently use the internet?

Time spent with traditional media

Qatari nationals spend over 19 hours per week (between 2 and 3 hours a day) watching TV, about 4 hours more than Westerners. At an average of 10 hours per week, Westerners spend about 3 hours more per week reading newspapers than all other ethnic sub-groups. Radio listeners tune in about 12 hours a week, and Westerners read magazines for about 4 hours more each week than do Qatari nationals.

Time Spent with Media – Qatar Only

Time Spent with Each Source Per Week



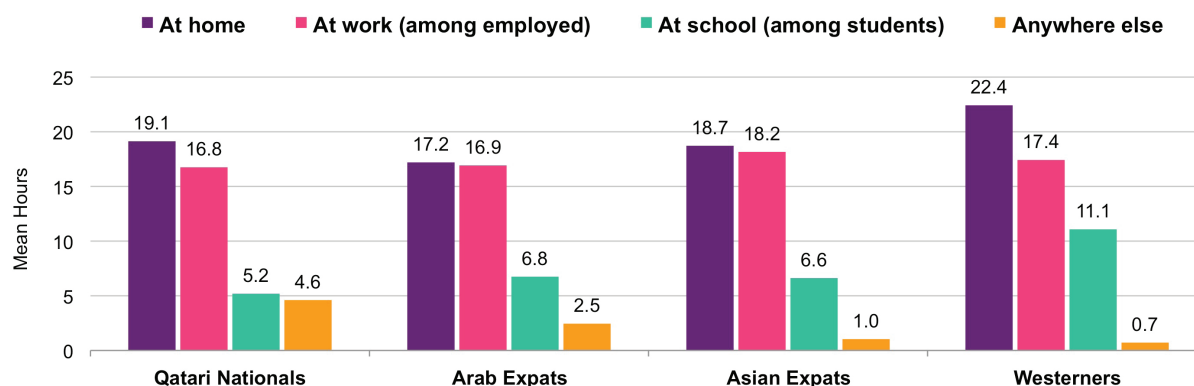
BASE: ALL QATAR RESPONDENTS
Q11. During a typical week, how many hours do you spend on the following activities not online?

Time spent on the internet

Residents of Qatar spend considerable time online – about 19 hours a week at home (the same as television), 17 hours per week at work for those employed, and for students, 7 hours per week at school. Westerners spend twice as much time as do Qatari nationals online at school (11 hours compared to 5 hours per week typically), and also spend slightly more time than other groups on the internet at home (22 hours per week).

Time Spent Online – Qatar Only

Time Spent Per Week Using the Internet at Each Location



BASE: ALL QATAR RESPONDENTS, INTERNET USERS
Q17. On average, about how many hours per week do you use the Internet in the following locations?

Languages used to access media

There are large differences between ethnicities in the languages they use to access media. The most distinctive separation of language choices occurs in reading newspapers. Qatari nationals and Arab expatriates living in Qatar choose Arabic almost exclusively to read newspapers, in the same way that Westerners and Asian expatriates read their papers primarily in English. For television, nearly half of Qatari nationals and Arab expatriates watch English programming in addition to Arabic, while Westerners watch English programming almost exclusively. Asian expatriates are likely to watch TV in a variety of languages, but very rarely in Arabic – six in ten (60%) Asian expatriates prefer English television, and about a third choose Hindi and/or Urdu as well.

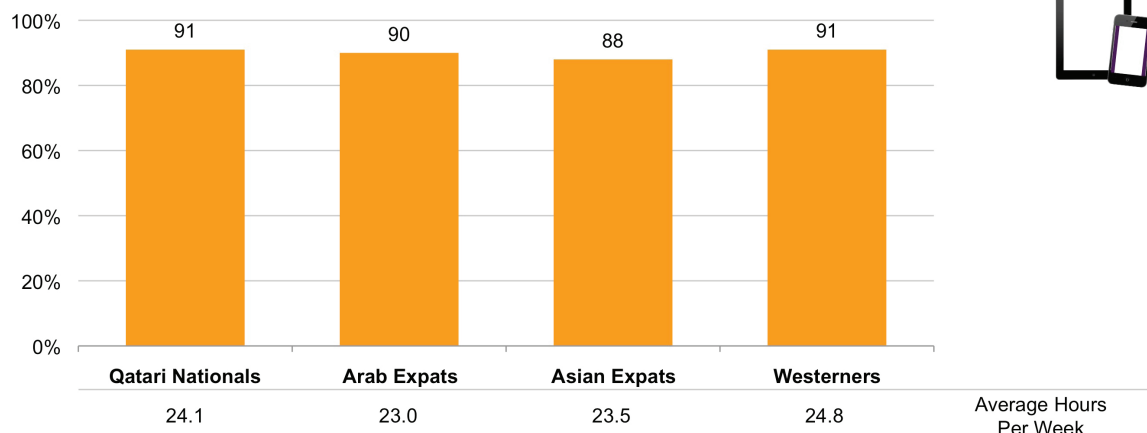
The internet stands out in Qatar, in that English is more likely overall (76%) to be used than Arabic (56%). This general difference (English leading Arabic) may be explained by the high concentration of non-Qataris, especially Asians and Westerners, who access the internet in English. Qatari nationals are much more likely to go online using Arabic (94% say so), but a majority of them (56%) also use English to access internet content. The same is true of Arab expatriates (88% Arabic, 63% English).

The use of wireless handheld devices

Almost everyone is mobile in Qatar, with use of handheld wireless devices at 89% among internet users. Wireless connectivity is similar across ethnic groups, as is time spent on wireless devices, which averages 23 hours per week. Qatari nationals are more likely than other residents, especially non-Arabs, to use smartphones (84% Nationals vs. 65% Westerners and 61% Asians). Westerners and Asians, on the other hand, are more frequent users of laptops (66% Westerners and 69% Asians vs. 46% Nationals). Tablets, such as iPads, are used by half of Qatari nationals (49%), but by fewer Arabs in Qatar (32%), Asian expatriates (21%) and Westerners (37%).

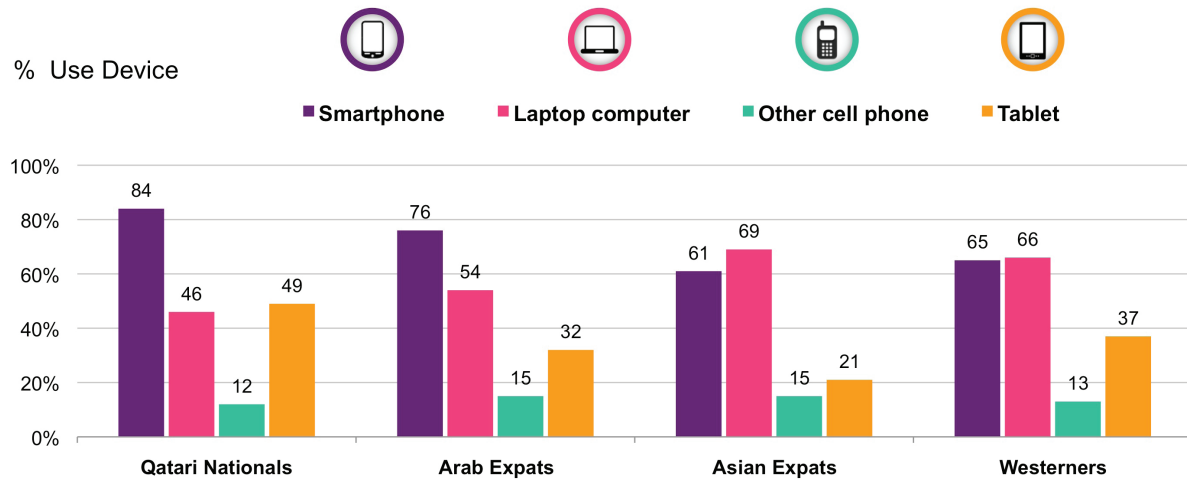
Use of Wireless Handheld Devices - Qatar Only

% Use Internet Through Wireless Handheld Devices



BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS
 Q26. Do you use the Internet through wireless handheld devices such as a mobile phone or tablet?
 BASE: QATAR RESPONDENTS WHO USE WIRELESS HAND-HELD DEVICES
 Q27. How many hours per week do you use the Internet through wireless handheld device(s)?

Wireless Devices Used - Qatar Only



BASE: QATAR RESPONDENTS WHO USE WIRELESS HAND-HELD DEVICES
Q28. Which wireless handheld device(s) do you use?

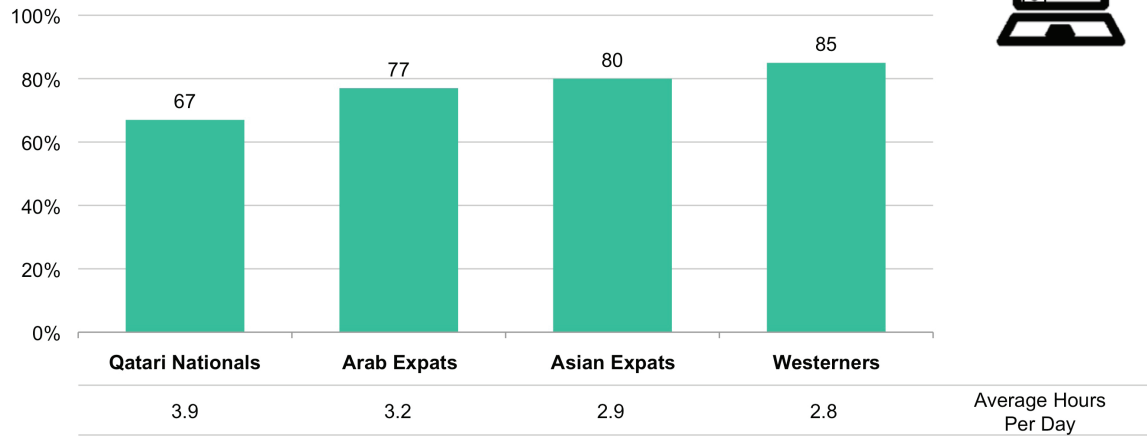
Social networking online

Social networking use is common among residents of Qatar, albeit not as much as those in other countries. Three-fourths (76%) of all internet users in Qatar uses social networking sites. The incidence of social networking online is higher among Westerners (85% of internet users) and lower among Qatari nationals (67%).

Facebook dominates social networking, as 86% of adults who network use this platform. However, while nine in ten non-nationals are on Facebook, only two-thirds of Qatari nationals (65%) use this site. Qatari nationals are far more likely than non-nationals to be using Twitter (65%) and Instagram (48%). Nearly half (48%) of Arab expatriates are also on Twitter, unlike Asian expatriates (27%) and Westerners (24%). Google+ is used by only 10% overall, and LinkedIn (popular in the West) is hardly used in Qatar at all.

Use of Social Networking Sites - Qatar Only

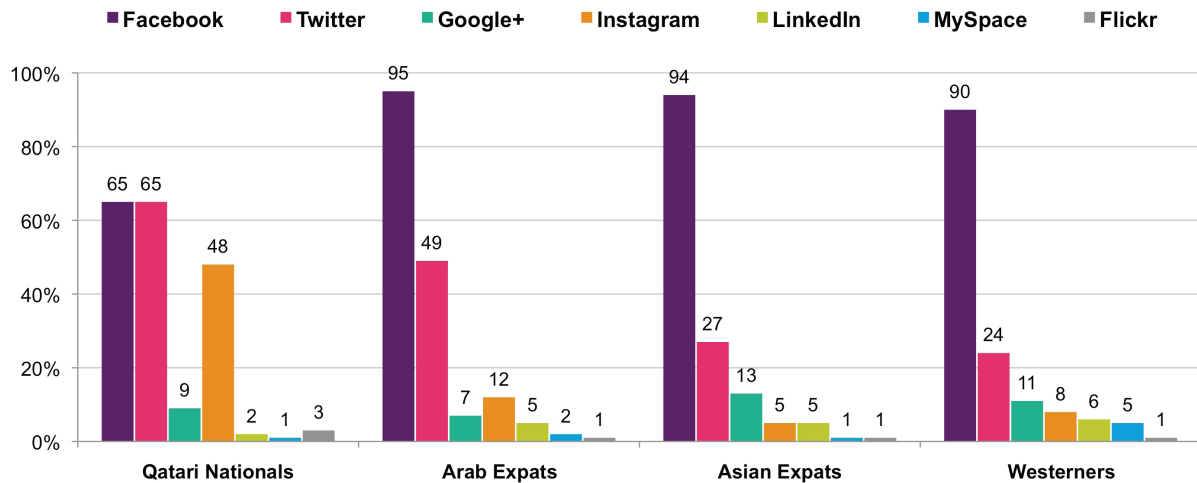
% Use Social Networking Sites



BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS
Q35. How much time in a typical day do you spend using social networking sites?
(Total minus 'Do not use social networking sites/Don't know/Refused')

Social Networking Sites Used - Qatar Only

Sites Used (%)

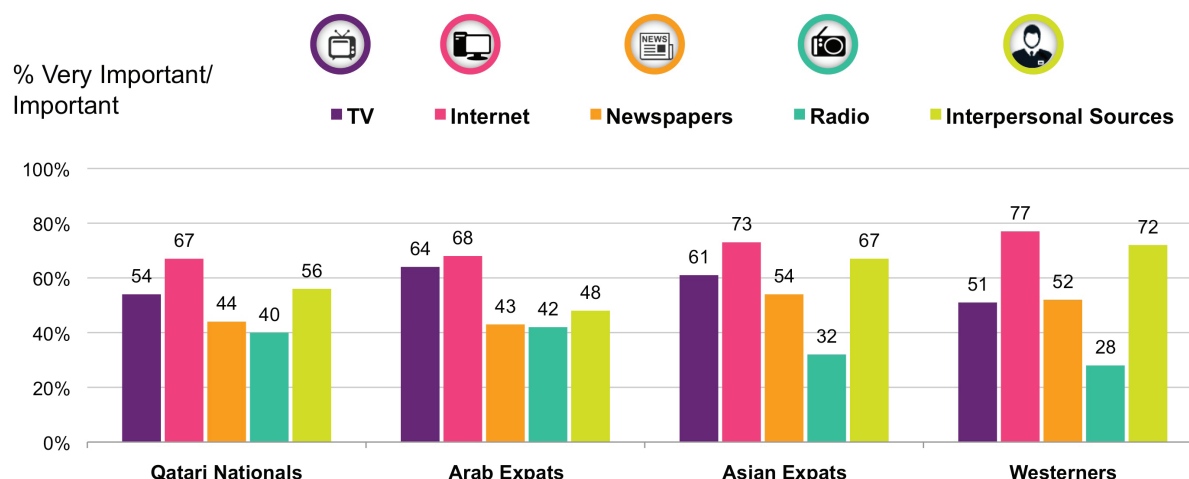


BASE: QATAR RESPONDENTS WHO USE SOCIAL NETWORKING SITES
Q36. Which of the following social networking sites do you use?

Importance of sources of information for news and current events

The internet is viewed as the most important source of information for news and current events in Qatar, surpassing even television. Nearly three-quarters (70%) of all residents of Qatar regard the internet as an important source of news, compared to a modest majority (59%) who say TV is important. Westerners (77%) and Asian expatriates (73%) are the most likely to view the internet as an important source for news, but even a large majority of Qatari nationals (67%) and other Arabs in Qatar (68%) agree, and in fact the internet trumps TV among all ethnicities.

Importance of Media Sources for News - Qatar Only



BASE: ALL QATAR RESPONDENTS

Q18. For news and current events, how important is each of the following to you as a source? Use the following scale: 1=Not important at all, 2=Not important, 3=Neutral/Undecided, 4=Important, 5=Very Important.

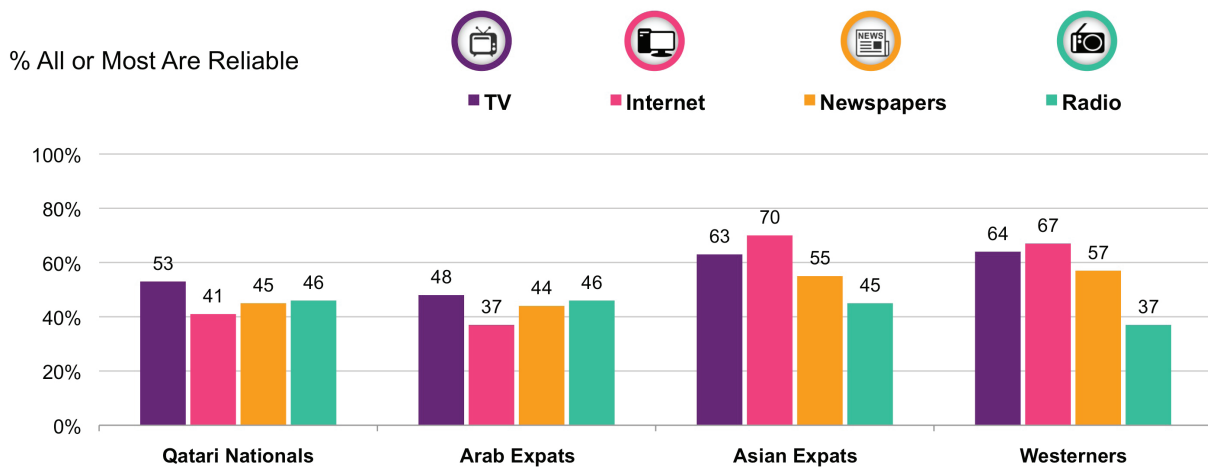
Reliability of information sources

Qatar's Asian expatriates and Westerners are more sanguine than are Qatari nationals and Arab expatriates about the reliability of information they receive from media.

Respondents cite low reliability of information received from media. Television is felt to be reliable as an information source by a bare majority (55%) of the adult population in Qatar, a perceived level of reliability only just ahead of the internet (51%) and newspapers (49%). Expatriates in Qatar, including Asians (63%) and Westerners (64%), are more accepting of the reliability of TV than are Qatari nationals (53%) and other Arabs (48%).

Perceptions of the general reliability of information on the internet are more marked in the distinction between outsiders and locals than for TV. While nearly three-quarters (70%) of Asians and two-thirds (67%) of Westerners find the internet to be reliable, a minority (41%) of Qatari nationals feel this way, as do even fewer (37%) Arab expatriates.

Perceived Reliability of Information by Medium Qatar Only



BASE: ALL QATAR RESPONDENTS
 Q20. How much of the information from the following sources do you feel is generally reliable?
 Use a scale of 1 to 5 where "1" means none of it is reliable and "5" means that all of it is reliable.

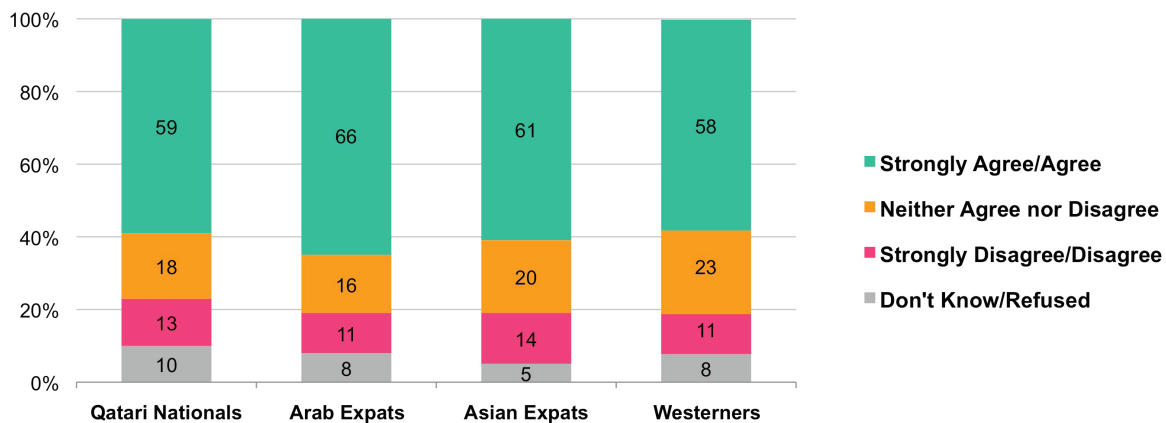
Quality, credibility and independence of news reporting

Nearly two-thirds (62%) of Qatar residents feel the quality of news reporting in the Arab world has improved over the past two years, with a slight majority (53%) finding the news media to be credible. This seems a tepid endorsement, particularly as it is coupled with split agreement (50%) that “the media can report the news without interference.”

The perceived credibility and (improving) quality of news reporting in Qatar generally reflect the views of all resident sub-segments of the population.

Increase in Perceived Quality of News Reporting Qatar Only

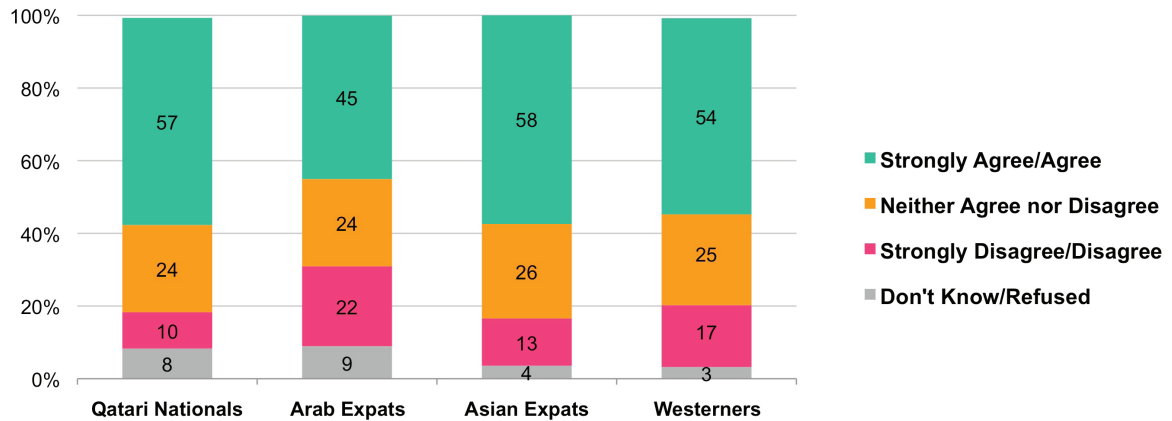
The Quality of News Reporting in the Arab World Has Improved Over the Past Two Years (%)



BASE: ALL QATAR RESPONDENTS
Q39A. To what extent do you agree or disagree with the following statement?
Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

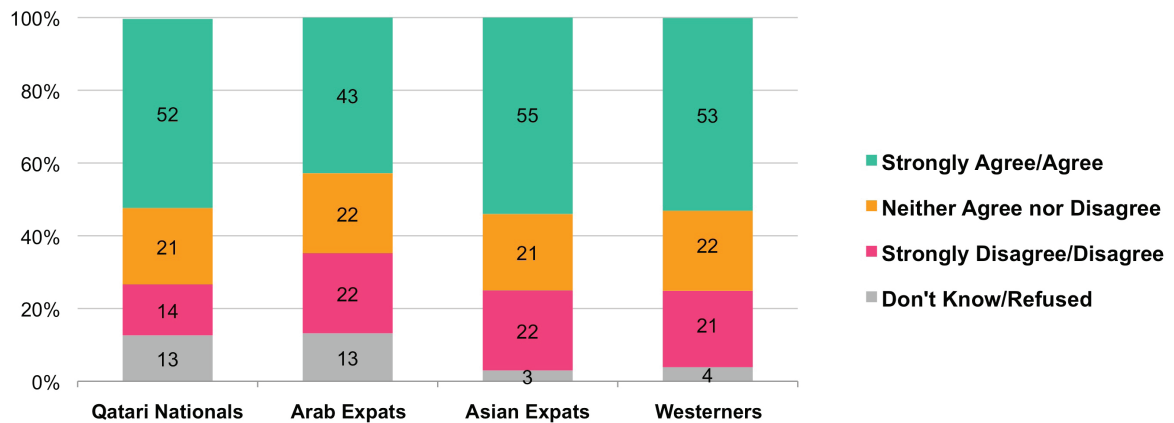
Credibility of News Media - Qatar Only

News Media in Your Country Are Credible (%)



Independence in News Media – Qatar Only

Media Can Report the News Independently Without Interference from Officials (%)

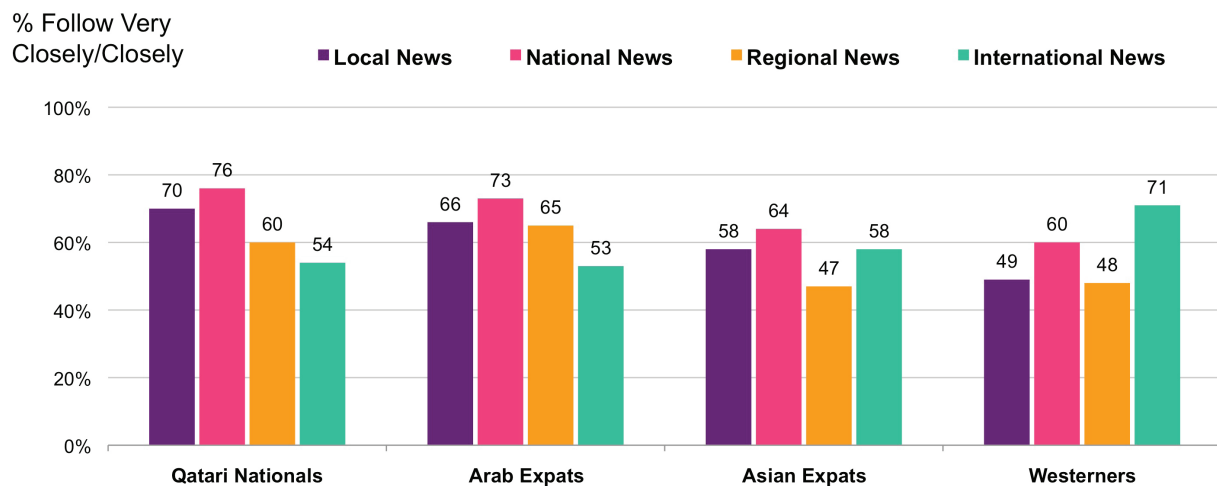


BASE: ALL QATAR RESPONDENTS
 Q39C. To what extent do you agree or disagree with the following statement?
 Use a scale of 1 to 5 where "1" means strongly disagree and "5" means strongly agree.

Following the news

Driven by ethnic diversity, residents of Qatar follow all types of news, from national (70% follow closely) and local news (63%) to regional and international news (57% each). Not surprising perhaps, Qatari nationals (76%) and Arab expatriates (73%) are more interested than Asian expatriates (64%) and Westerners (60%) in national news, whereas Westerners are far more interested in international news (71% follow closely) than Qatari nationals (54%).

Local vs. International News - Qatar Only



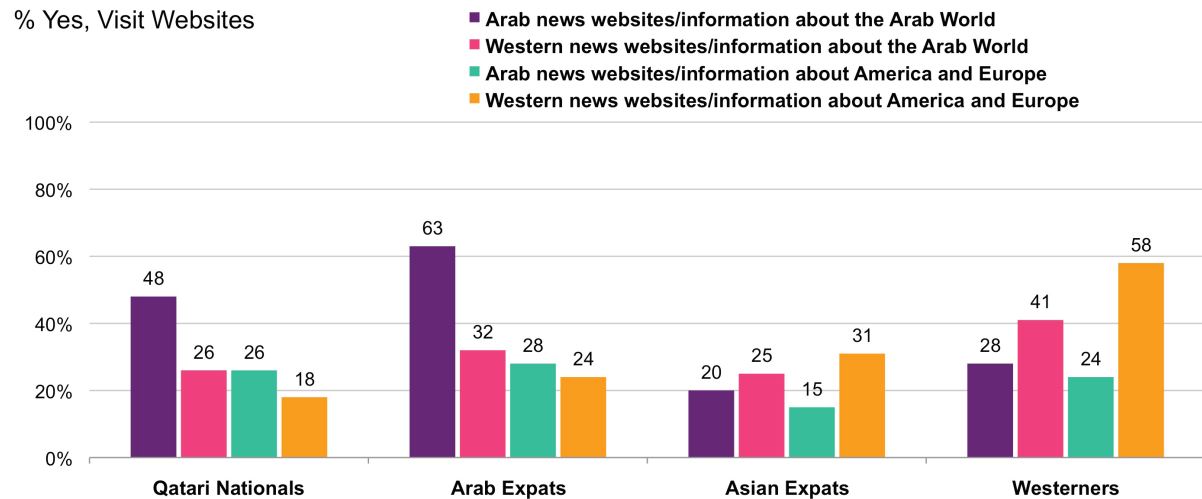
BASE: ALL QATAR RESPONDENTS
Q40. How closely would you say you follow each type of news and current events?
1=Not at all closely, 2=Somewhat closely, 3=Closely, 4=Very closely.

Qatari nationals and Arab expatriates (58% each) are much more likely to turn to Al Jazeera than are Westerners (25%), and also – but less frequently – to Al Arabiya (19%), whereas the latter are more likely to go to the internet generally (17%) and Western sources such as the BBC (18%) and The Times (unspecified) (24%).

Arab vs. Western news websites

Qatari nationals and other Arabs are more likely to turn to Arab websites for news of the Arab world, while Westerners are more likely to turn to Western websites for such news as well as news of Europe and America. About one-third of all ethnic groups view Arab news sites to be trustworthy. The opinion is split with regard to Western news sites – 44% of Westerners find them to be trustworthy, compared with one-fourth of Qatari nationals and other Arabs and one-third of Asian expatriates.

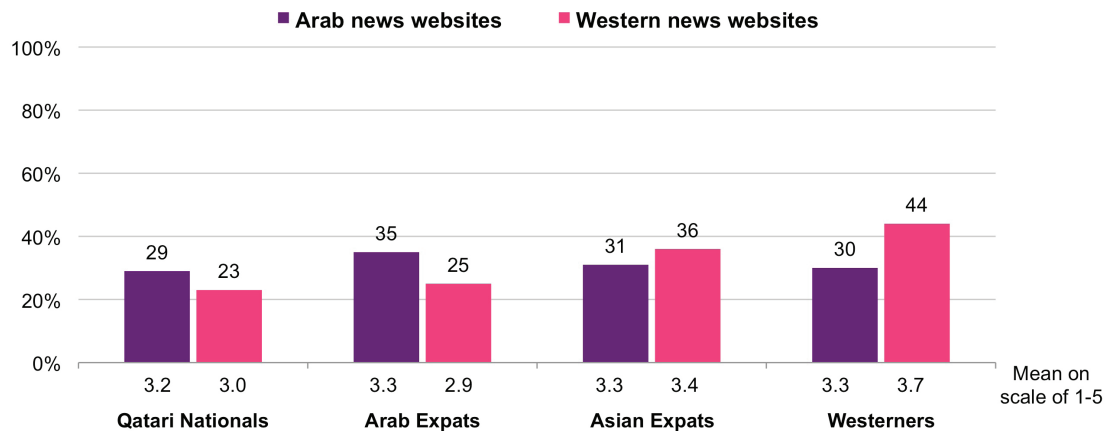
Arab vs. Western News Websites – Qatar Only



BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS
Q43/Q44/Q45/Q46. Do you visit Western news websites/Arabic news websites to get information about America and Europe/Arab World?

Trustworthiness of News Websites – Qatar Only

% Consider Trustworthy
Top 2 Box (Rated 4, 5 on 5 point scale)



BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS
Q47. Please give each item below a rating of 1 (Not trustworthy) – 5 (Extremely trustworthy), based on how trustworthy you consider them to be.

Views on the internet vis-à-vis society

Those in Qatar seem to be cautiously optimistic regarding the benefits the internet brings to the flow of information, ideas and influence with respect to “powerful institutions” and “public issues.”

Six in ten internet users in Qatar (60%) agree that “people like you can better understand the nature of powerful institutions” and a similar number feel that people “can have more influence on society” (58%) and “have more say about public issues” (57%) by accessing the internet. Half believe the internet can influence the extent to which “institutional leaders will care what they think.” These sentiments apply to all sub-segments of the population. Asian expatriates and Westerners are a little more optimistic about being able to “better understand the nature of powerful institutions” (two-thirds agree) than are Qatari nationals (55%) and Arab expatriates (56%).

The Internet and Learning/Public Issues - Qatar Only

% Strongly Agree/Agree with Statements	Qatari Nationals	Arab Expats	Asian Expats	Westerners
One can learn about new technological developments in the world	82%	87%	84%	83%
One can acquire more knowledge on life matters that help you better handle your life	69%	75%	75%	66%
You will be able to make more informed choices on products and brands to use	62%	64%	63%	64%
You can communicate and give your opinions towards different products and services available to you	65%	59%	66%	67%
People like you can better understand the nature of powerful institutions	55%	56%	67%	66%
People like you can have more say about public issues	54%	57%	58%	58%
People like you can have more influence on society	56%	60%	58%	56%
Institutional leaders will care more what people like you think	48%	51%	51%	46%

BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS
Q31. Please tell me how much you agree or disagree with each of these statements.
Use a scale of 1 to 5 where “1” means strongly disagree and “5” means strongly agree.

Speaking out

Residents of Qatar are mixed regarding speaking out on the internet. The internet is admittedly the “first place I go to get information” by over three-quarters (79%) of Qatar residents. Additionally, six in ten believe “it is okay for people to express their ideas on the internet even if they are unpopular” and “generally people are responsible with regard to the opinions they express on the internet.” However, only a bare majority (54%) feel comfortable “saying what I think about public issues” and fewer than half (46%) feel it “safe to say whatever one thinks about public issues.” A small majority (52%) feel “people should be free to criticize powerful institutions on the internet,” and slightly more (57%) feel

the “internet in Qatar should be more tightly regulated than it is now.” Only about a third (38%) is worried that powerful institutions are checking what they are doing online.

Perceptions about speaking out are fairly similar across ethnic groups, with a few notable exceptions:

- Westerners are most likely to believe “people should be able to express their opinions online,” Qatari nationals are the least likely to agree (68% vs. 57%).
- Conversely, Qatari nationals are most likely to believe “the internet should be more tightly regulated in Qatar,” whereas Westerners are the least likely to agree (60% vs. 47%).
- Westerners and Asians (46% each) are more worried about powerful institutions checking what they do online, compared with one-third of Qatari nationals and other Arabs.

Perceptions about the Internet - Qatar Only

% Strongly Agree/Agree with Statements	Qatari Nationals	Arab Expats	Asian Expats	Westerners
When I need information, the first place I go to is the internet	82%	79%	77%	77%
In general, people are responsible with regard to the opinions they express on the internet	62%	64%	54%	61%
It is okay for people to express their ideas on the Internet, even if they are unpopular	57%	62%	61%	68%
There is not enough awareness of the laws, regulations and moralities that control the one's activities on the internet	46%	53%	56%	54%
The Internet in my country should be more tightly regulated than it is now	60%	56%	62%	47%
On the Internet, it is safe to say whatever one thinks about public issues	47%	45%	44%	46%
People should be free to criticize powerful institutions on the Internet	55%	47%	53%	57%
I am worried about powerful institutions checking what I do online	34%	33%	46%	46%
In general, I feel comfortable saying what I think about public issues	59%	52%	50%	57%
I am worried about companies checking what I do online	36%	34%	44%	46%

BASE: ALL QATAR RESPONDENTS; *ASKED QATAR RESPONDENTS WHO ARE INTERNET USERS

Q38. To what extent do you agree or disagree with the following statement?

Use a scale of 1 to 5 where “1” means strongly disagree and “5” means strongly agree.

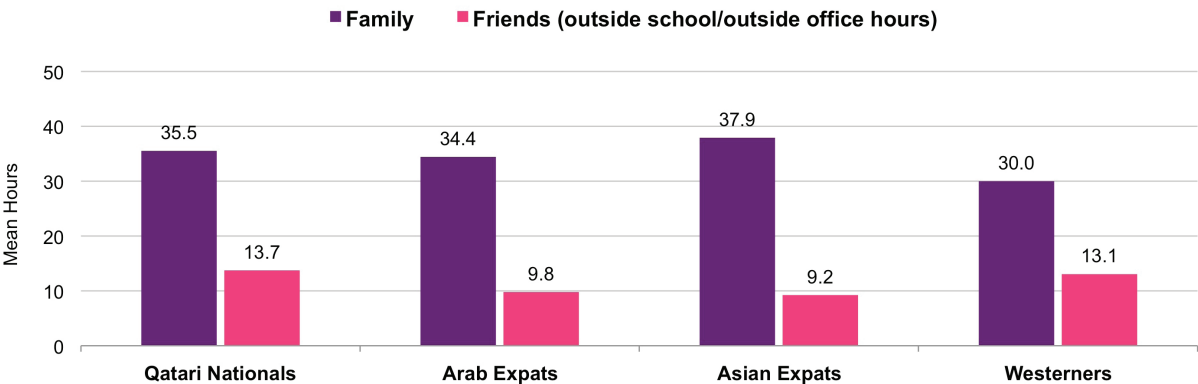
Impact of internet on interpersonal contact

People in Qatar spend an average of 35 hours per week socializing with family face-to-face and 11 hours per week socializing with friends. Perhaps not surprising, Westerners – who may be less likely to have family in the country – spend 5 hours less socializing with family per week.

Expatriates are far more likely to rely on the internet to maintain connections with family and friends. About three-fourths of Asian expatriates and Westerners say the internet increases their contact with family and friends, compared with about half to six in ten Qatari nationals and other Arabs. Westerners and Asian expatriates are also more likely to connect with others in their profession online.

Socializing with Family & Friends – Qatar Only

Time Spent Socializing with Friends and Family in a Typical Week



BASE: ALL QATAR RESPONDENTS
Q12 /13. During a typical week, how many hours or minutes do you spend socializing face-to-face with...?

Optimism

Residents of Qatar – citizens and expatriates alike - are highly optimistic about their own future. Over nine in ten (92%) say they are optimistic about their own future, among which 59% are very optimistic.

Impact of Internet on Contact with Others - Qatar Only

% Internet Usage Increases Contact
(Rated 4, 5 on 5 point scale)

	Qatari Nationals	Arab Expats	Asian Expats	Westerners
Friends	57%	60%	75%	72%
Family	50%	54%	71%	71%
People who share your hobbies/ recreational activities	48%	40%	53%	59%
People who share your views on society	47%	43%	55%	48%
People who share your religious beliefs	47%	43%	53%	42%
People in your profession	48%	48%	63%	61%

BASE: QATAR RESPONDENTS WHO ARE INTERNET USERS

Q30. Does your use of the Internet increase or decrease your contact with the following groups online and offline? Use a scale of 1 to 5 where "1" means greatly decreased, "5" means greatly increased, and, of course, "3" means your contact with these groups has remained the same.



Conclusion and the way forward

As the findings in this study indicate, the Arab world, unlike its somewhat monolithic image in the West, is awash with diversity and complexity, thus making generalizations from data about media use across the eight countries in the survey difficult. Though mostly unified by Islam and to a large degree the Arabic language, it takes little more than a cursory assessment to see the striking differences in people's media use in the several nations. As readers of this study drill down into the findings across various demographic variables, there are striking differences that beckon one's attention. For example, *citizens* of a given country versus *expatriates*—among them permanent residents as well as those more transient, including so-called "guest workers," and even refugees. Even generalizing about a given country where a large majority of residents are not citizens, such as the UAE and Qatar, calls into question what one makes of data in places where the population may be fluid and where "residents" carry scores of different passports. Different dialects of Arabic, some easily understood by all Arabic speakers, some not, exist in the Arab world alongside other regional languages and those brought by outsiders from Europe, North America and the Indian subcontinent. Education and wealth levels also reflect a yawning chasm between the populations even in countries that can otherwise be typecast as rich or poor.

Residents of Arab Gulf countries, for example, register high internet use by global standards. They spend more time online, are more likely to have broadband at home, tote more tablets, and receive more data on smartphones than residents in the Levant or North Africa. Sizeable numbers of those in Jordan, Tunisia, Lebanon, and Egypt, on the other hand, do not use the internet or own mobile devices.

While commentators in the west decry the intrusion of the internet on interpersonal communication and the death of conversation, this is assuredly not the case in the Arab world, where interpersonal communication continues to play a powerful role—even in online communication (social communication online is the most popular activity reported by those in the survey). Arabist Margaret Nydell's statement that conversation is the Arab world's "most popular form of entertainment" is reinforced in this study. In-person interactions also rank high as a major source of news along with television and internet in this research.

It is not surprising that the most common online activity among respondents in the study, in fact, was conversation; instant messaging is the most common online pursuit among respondents, with email a near second. Participating in chat rooms was, likewise, also a common undertaking, the third most common online activity. Those online in the eight various countries are highly active on social networking sites. Respondents also indicated that time spent online doesn't tend to detract from face time with family and friends.

Although the perceived role of the internet in the Arab revolutions in 2011 was widely publicized, the data in this study reveal a genuine digital divide, between the four wealthy Gulf states – Bahrain, Qatar, Saudi Arabia and UAE – and those that do not share such abundance – Egypt, Jordan, Lebanon and Tunisia. The digital divide demarcates technological abilities in the Arab world about as starkly as anywhere on earth. For many of the media use variables in this study, the four Arab Gulf countries reflect development, while the four non-oil rich states of Tunisia, Egypt, Jordan and Lebanon demonstrate lack of access to certain media, or avoidance.

Qataris are hyper-connected, for example, and own multiple mobile devices, and half of Qatar's citizens use tablets, which may be the highest rate of tablet reliance anywhere. Bahrainis report the highest overall levels of media consumption of any national population examined in this study, including substantive consumption of traditional and e-books. Egypt, on the other hand, is media poor, and people in that country report extremely low levels of book readership (1 in 14 people said they read books), low internet connectivity, and underwhelming use of magazines and newspapers.

There was agreement across the region in terms of support for both online freedom of speech and government regulation of internet communication. Respondents tend to agree that individuals have a right to say what they wish online, even if incendiary, while also agreeing that governments should do more to regulate the internet. While observers in the West may view this as an obvious contradiction, according to the research of Richard Nisbett and others, support for personal freedoms versus government oversight is not a zero-sum game.

What do we learn from this study? We gained a better understanding of the interplay of new and old media. In a region where studies of this scope and depth have not been common, this research gives us a base and a platform for further study both in Qatar, our home base, and across the region. As part of our commitment to the World Internet Project we will continue to contribute data to their body of findings—and enhance understanding of an underrepresented Middle East. By using the WIP questions in this study, we necessarily focused more on news use and public affairs indicators than on entertainment. Further research may probe the changing contours of entertainment and opinion media and perhaps the role of advertising in a region

where state-sponsored and subsidized media live alongside more independent news organizations online.

The study reinforces our desire to continue to explore not just media use, but also matters of freedom of expression and freedom of information. No where in the world are media poised for greater change both in understanding public affairs, but also the development of a modern media economy and knowledge-based industries.

The months of effort this study represented, including negotiating with governmental authorities to get permission to field the project in eight very different countries was, in our view, well worth the time, energy and resources devoted to the task. Already with the release of early data from the study, media across the region not only covered the general findings, but seized on specific data to open discussions of the role of television, how the internet is changing pan-Arab communities, and the varying longevity of legacy media. This study opens the window on much research that can follow, whether at NU-Q or elsewhere. To the extent that we have stimulated dialogue on the importance of media as a matter of intellectual and social development, so much the better.



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