



Agenda

Introductions & Welcome

Chris Stewart,
Partner, Gallup

Introduction to BBG Research

Bruce Sherman,
*Director of Office of Strategy
and Development, BBG*

World Poll Findings

Mohamed Younis,
*Senior Analyst and Senior
Practice Consultant, Gallup*

BBG Findings

Diana Turecek,
*Director of Audience Research,
MBN*

Discussion

Following the brief presentations, we hope to engage in active discussions on topics such as

- What are the most "important" MENA countries for digital media and where are the largest and most receptive audiences?
- Which is better for reaching audiences in North Africa and the Gulf, YouTube or Facebook?
- How should information providers use mobile apps and Twitter?
- What are some of the content pitfalls related to current political and social dynamics?

For more information about the BBG Research Series, please visit:

bbg.gov/bbgresearch

CHRIS STEWART

Christopher Stewart is a partner at The Gallup Organization. Mr. Stewart provides strategic counsel in the area of marketing communications, advanced analysis and modeling, and population-based assessments. Additionally, he plays a senior leadership role as a strategic advisor for Gallup's 165 country public opinion tracking program – The Gallup World Poll.

Mr. Stewart previously served for 10 years as Regional Managing Partner of the Asia Pacific Division where he had responsibility for managing Gallup's seventeen offices in the Asia Pacific region. He remains a Director of Gallup in Singapore, Thailand, Australia, Malaysia, Hong Kong, and India, and as the General Director of Gallup Institute LLC, a Russian subsidiary of Gallup, Inc.

BRUCE SHERMAN

Bruce Sherman is responsible for global strategy and research for the Broadcasting Board of Governors (BBG). He joined the BBG in 1996 after twelve years at Radio Marti, the broadcasting service for Cuba, including five years as the station's deputy director in charge of all daily operations. Mr. Sherman directs formulation and execution of BBG strategy, leading a team of senior managers and planners across all broadcast groups. He has overseen development of the three 5-year strategic plans, including the most recent 2012-2016, and is their principal author.

Mr. Sherman also has played a central role in launching new strategic initiatives for the Muslim world, including Radio Sawa and Alhurra TV for the Middle East and Radio Farda for Iran. These and other strategic initiatives since 2002 have expanded the BBG's worldwide audience from 100 million to over 200 million people weekly. He built and also directs the BBG's global media research program, with quantitative and qualitative studies in some 70 countries and an annual budget of \$10 million. The program is one of the most comprehensive media research efforts in the world. Mr. Sherman holds a bachelor's degree in political science from the University of Florida and a master's degree in liberal arts from St. John's College.

DIANA TURECEK

Diana Turecek is the Director of Audience Research at MBN, where she designs and manages media research across the Arab world. Since 2012, she has focused on measuring the impact of media on local audiences, analyzing regional market trends, and providing research-based advice on the best programming strategies for reaching diverse audiences. She has designed and launched more than 20 studies of media use in virtually every country of the Arab world.

Prior to this, Ms. Turecek was the Regional Research Manager for MENA and Africa at the InterMedia Survey Institute where she oversaw qualitative and quantitative media studies in the Middle East, Africa, and Southeast Asia. Ms. Turecek has designed and overseen focus groups and survey research in Egypt, Morocco, Lebanon, Jordan, Tunisia, the UAE, Turkey, Cambodia, Laos, and Vietnam and has conducted in-depth interviews with journalists and senior government officials in Tunisia and Southeast Asia.

Prior to her position at InterMedia, she spent 18 years as a researcher and senior analyst in the US government where she advised senior US government officials on issues related to the Arab world. Turecek has lived in Morocco, France, and Italy and speaks Arabic and French. She is a graduate of the Johns Hopkins School of International Studies.

MOHAMED YOUNIS

Mohamed Younis is Gallup's subject matter expert on the Middle East and North Africa (MENA). He also serves as a Senior Analyst for the Gallup World Poll. His research at Gallup focuses on employment challenges in the Arab world and relations between Muslim majority and Western societies. Mr. Younis provides briefings to world leaders and institutions on Gallup's research and provides expert insight to television, radio and print media worldwide.

Since 2012, Mr. Younis has led one of Gallup's newest initiatives focused on advanced analytics. Relying on Gallup's sciences as well as external data sources, Mr. Younis leads a team of strategic advisers who monitor and consult on real-time geopolitical shifts around the world. During his time at Gallup, Mr. Younis helped design the most comprehensive and wide-spanning public opinion study on youth unemployment in the MENA region. Mr. Younis has also served as a Senior Analyst on Gallup's work regarding Muslim-West relations. As the MENA region expert for the Gallup Center for Muslim Studies, Mr. Younis regularly briefed global leaders on the statistical drivers of Muslim-West tensions and perceptions across and within Muslim majority societies and Western ones on attitudes toward Islam, extremism and prejudice.

Mr. Younis has a bachelor's degree in political sociology with an emphasis on social change in the MENA region and the Muslim-American experience from the University of California, Riverside. He received a juris doctorate degree from Washington and Lee University School of Law and is a member of the Virginia State Bar. Mr. Younis has studied and worked in Egypt, Saudi Arabia and Qatar and is fluent in Arabic.

Strategies for Digital Media in the MENA Region

BBG & Gallup

DIGITAL MEDIA USERS

Digital media use in the MENA region is characterized by a large digital divide in which most adults in the Persian Gulf regularly use Internet and Internet-via-mobile, and most adults in North Africa, Iraq, and the Levant do not. In Kuwait, Bahrain, and Qatar, 84%-89% of adults have used the Internet in the past week versus 40% of adults or fewer in Iraq, Morocco, Algeria, and Egypt. Despite this, even in low Internet use countries, millions of adults are using the Internet each week. In Egypt and Morocco, 14.1 and 8.5 million have used the Internet in the past week.

DEMOGRAPHICS OF DIGITAL MEDIA USERS IN A HIGH DIGITAL PENETRATION COUNTRY

The demographics of digital media audiences in high digital media use countries are very similar to the demographics of adults in these countries overall and include a wide variety of genders, educations, and ages. In Kuwait, past week Internet users differ from Kuwaitis overall in that they are slightly more likely to be highly educated and young, and significantly more likely to use the Internet weekly for news. Among past week Internet users in Kuwait, 39.9% have university degrees (versus 34.8% nationally) and 61.8% are under the age of 34 (versus 55% nationally). 95.5% used the Internet in the past week for news versus 79.8% of Kuwaitis nationally. 95.6% used television in the past week for news. The gender makeup of Kuwaiti Internet users is the same as the gender profile nationally.

DEMOGRAPHICS OF DIGITAL MEDIA USERS IN A LOW DIGITAL PENETRATION COUNTRY

The demographics of digital media audiences in low-penetration countries generally differ significantly from the demographics of adults in these countries overall and tend to primarily include young, educated, males. In Egypt, where past week Internet use is 24.9%, 70.4% of past week Internet users are males (versus 51% of the national population which is male). 53.4% are under the age of 24 (versus 30.3% of the national population which is under-24 years old). 35.1% of past week Egyptian Internet users have university educations versus only 14.7% of Egyptians overall. 81.6% have used the Internet in the past week for news, versus 22.1% nationally. 90.9% used TV in the past week for news versus 91.4% nationally.

DIGITAL MEDIA IN CONTEXT

While digital media use is increasing in several countries of the Arab world, significantly more adults continue to use television on a weekly basis than the Internet. The aggregate number of adults using television in the past week in Algeria, Bahrain, Egypt, Iraq, Kuwait, Morocco, Qatar, and Yemen is 139 million, versus 41.7 million for the Internet, according to the most recent BBG surveys in each country. In Iraq, Egypt, Morocco, and Algeria, 40% of the population or fewer has used the Internet in the past week; fewer have used sites such as Facebook, YouTube, or Twitter. Even in Bahrain, Kuwait, and Qatar, where digital media use is virtually universal, an average of 98.6% of adults have used TV in the past week versus an average of 86.3% for Internet. According to a 2-month 2012 BBG study, the most popular YouTube videos among Egyptians and Moroccans were often citizen-journalist repackaged content from traditional TV broadcasters.

METHODOLOGY

Data above is based on nationally representative conducted between 2013 and 2015 in surveys in Algeria (2013), Bahrain (2015), Egypt (2015), Iraq (2014), Kuwait (2014), Morocco (2013), Qatar (2014), Saudi Arabia (2013), and Yemen (2013). Sample sizes were Algeria (n=2034), Bahrain (n=2003), Egypt (n=2000), Iraq (n=2015), Kuwait (n=1200), Morocco (n=2008), Qatar (n=1500), Saudi Arabia (n=2008), and Yemen (n=1500). All surveys were conducted face to face with the exception of Iraq, which was conducted via a computer assisted telephone survey.

The **Broadcasting Board of Governors (BBG)** is the independent federal agency that oversees all government-supported U.S. civilian international media, whose mission is to inform, engage and connect people around the world in support of freedom and democracy. BBG programming reaches an audience of 226 million in more than 100 countries and in 61 languages. Networks within the BBG include the Voice of America, Radio Free Europe/Radio Liberty, the Middle East Broadcasting Networks (Alhurra TV and Radio Sawa), Radio Free Asia, and the Office of Cuba Broadcasting (Radio and TV Martí).

Gallup has studied human nature and behavior for more than 75 years. Gallup's reputation for delivering relevant, timely, and visionary research on what people around the world think and feel is the cornerstone of the organization. Gallup employs many of the world's leading scientists in management, economics, psychology, and sociology, and our consultants assist leaders in identifying and monitoring behavioral economic indicators worldwide. Gallup consultants help organizations boost organic growth by increasing customer engagement and maximizing employee productivity through measurement tools, coursework, and strategic advisory services. Gallup's 2,000 professionals deliver services at client organizations, through the Web, at Gallup University's campuses, and in more than 40 offices around the world.

Follow us on Twitter
@BBGgov
@Gallup

#bbgresearch

CONTACT

For any questions or further information on this data, please contact the Broadcasting Board of Governors at publicaffairs@bbg.gov or 202-203-4400.