

GALLUP®

# BBG Research Series



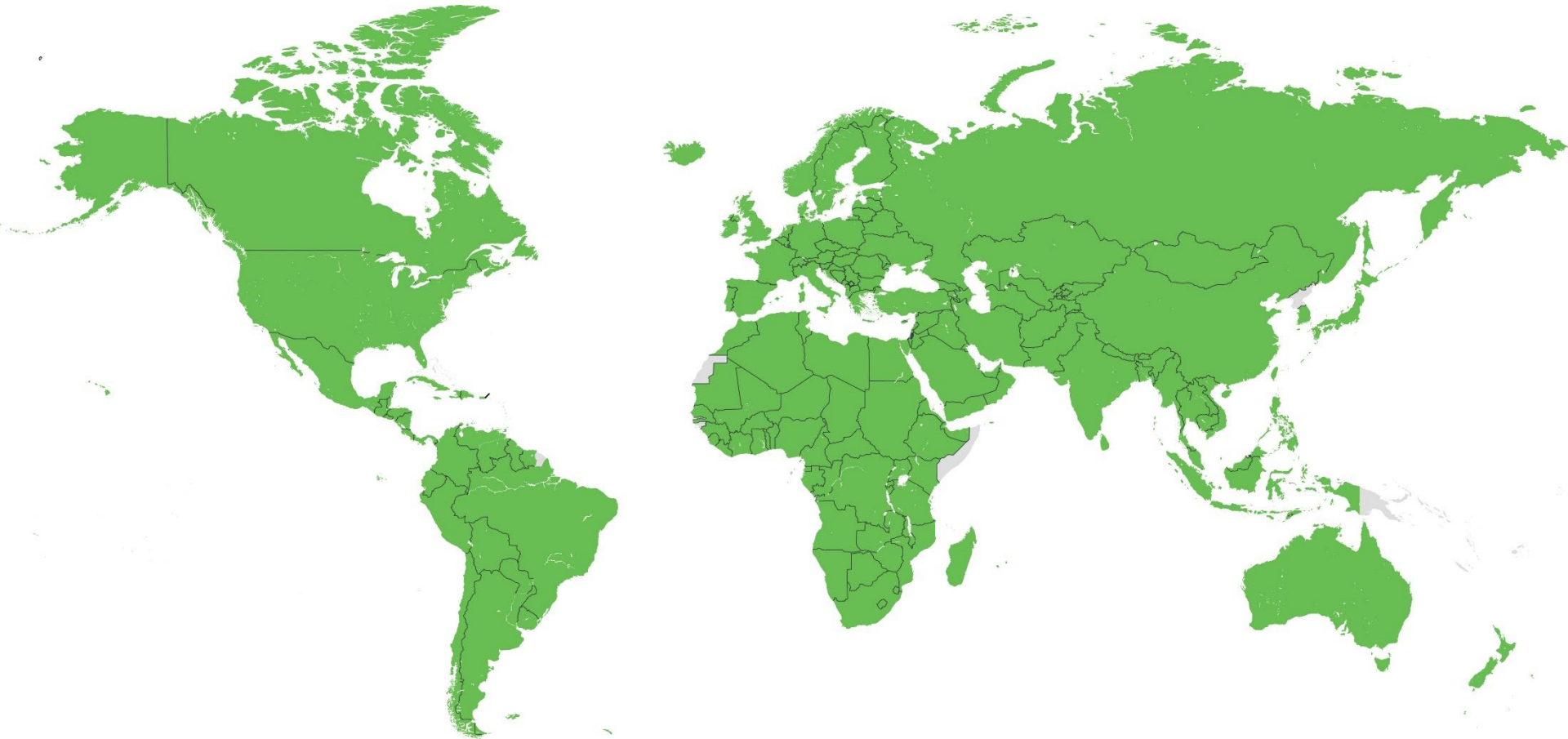
## Media Consumption in Iraq

# Iraq

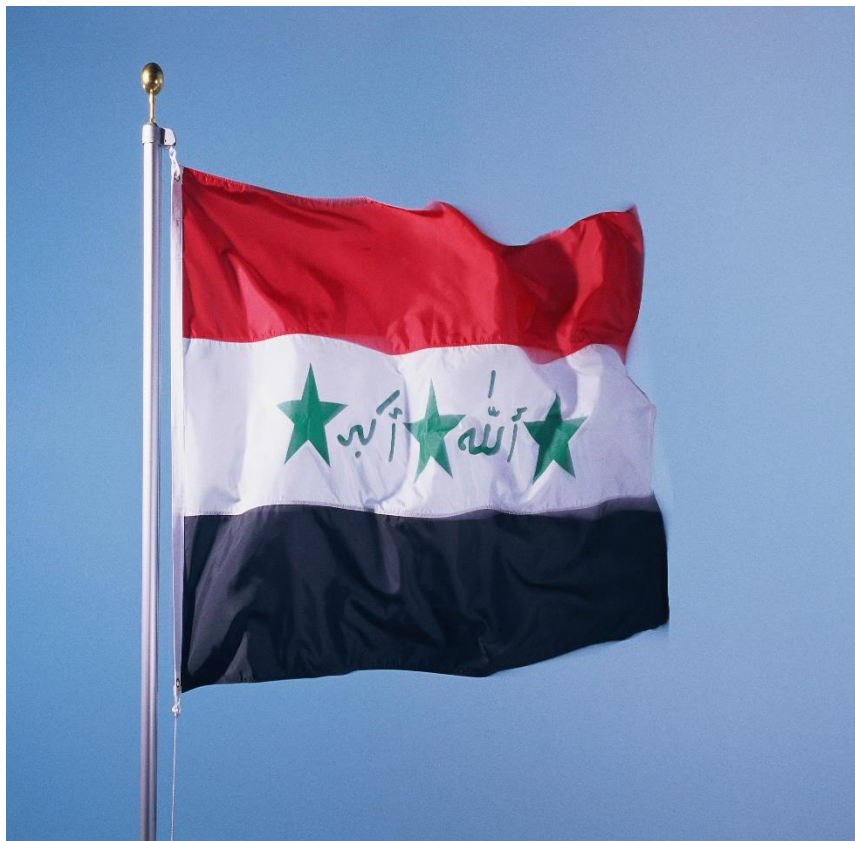
Findings From the World Poll

Mohamed Younis, Senior Analyst and Senior Practice Consultant, Gallup

# Gallup World Poll Coverage

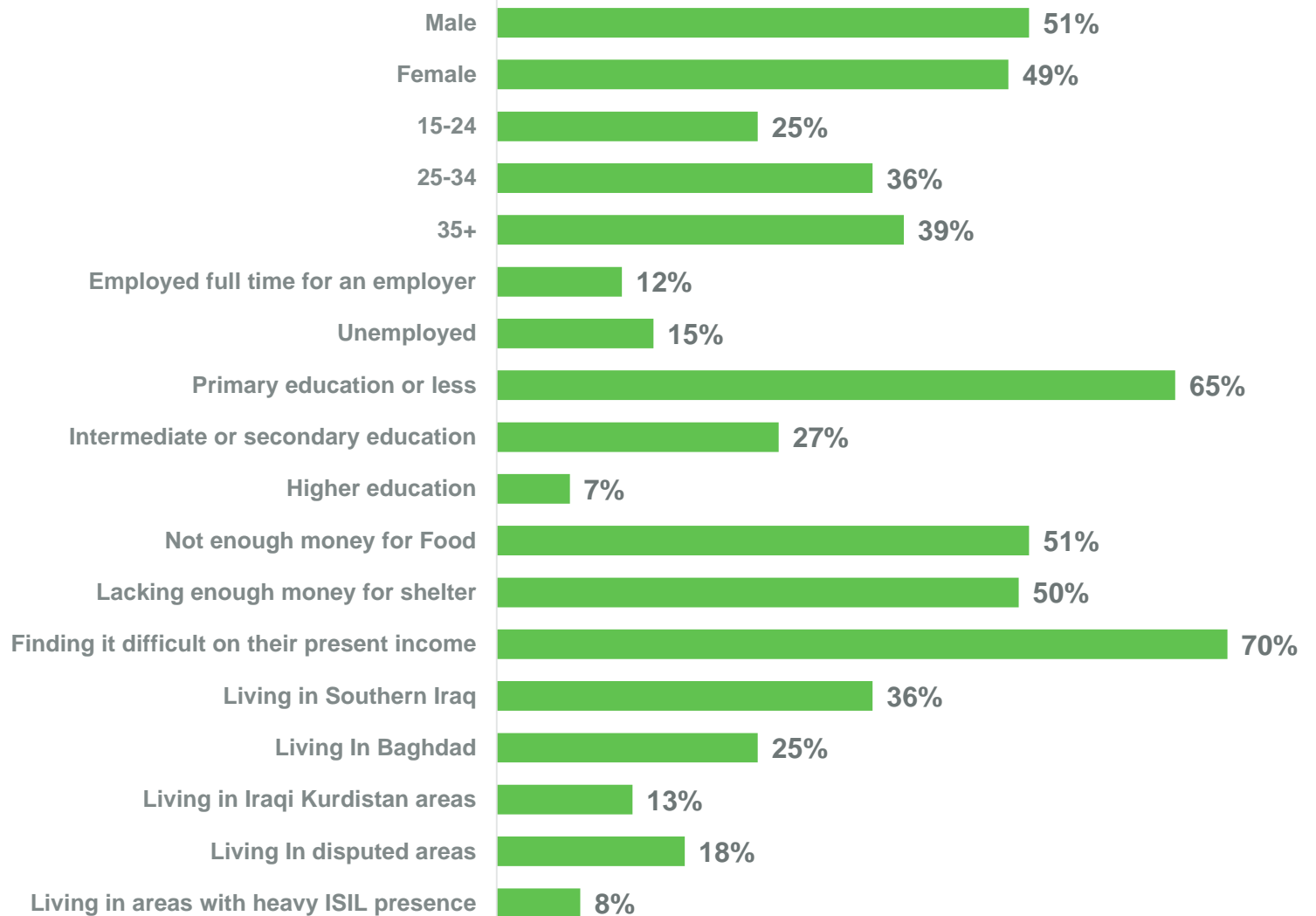


# Gallup World Poll Methodology



- Five telephone surveys since 2013
- Last survey: April 2016
- Nationally representative of all adults 15 years and older
- Sample size: Approximately 1,000 per survey
- Mode: Telephone (landline+mobile)
- MoE  $\pm 3.0$  percentage points

# Gallup World Poll in Iraq



# Freedom of Media — April 2016

Do the media in this country have a lot of **FREEDOM**, or **NOT**?

%Yes



# Developments in Iraq at Time of Survey

- Noticeable escalation in protest movements demanding government reform
- Sadrist sit-ins and protests continue in Baghdad
- Iraqi Forces fully clear Hit District (west of Ramadi)
- Security forces launch clearing operations in Diyala
- April 12<sup>th</sup> CoR session descends into chaos; Jabouri leadership challenged
- Oil remains around \$40-44/barrel exacerbating economic woes
- Beirut meeting between Sadr, Maliki and Sistani representatives under hospices of Hizbullah

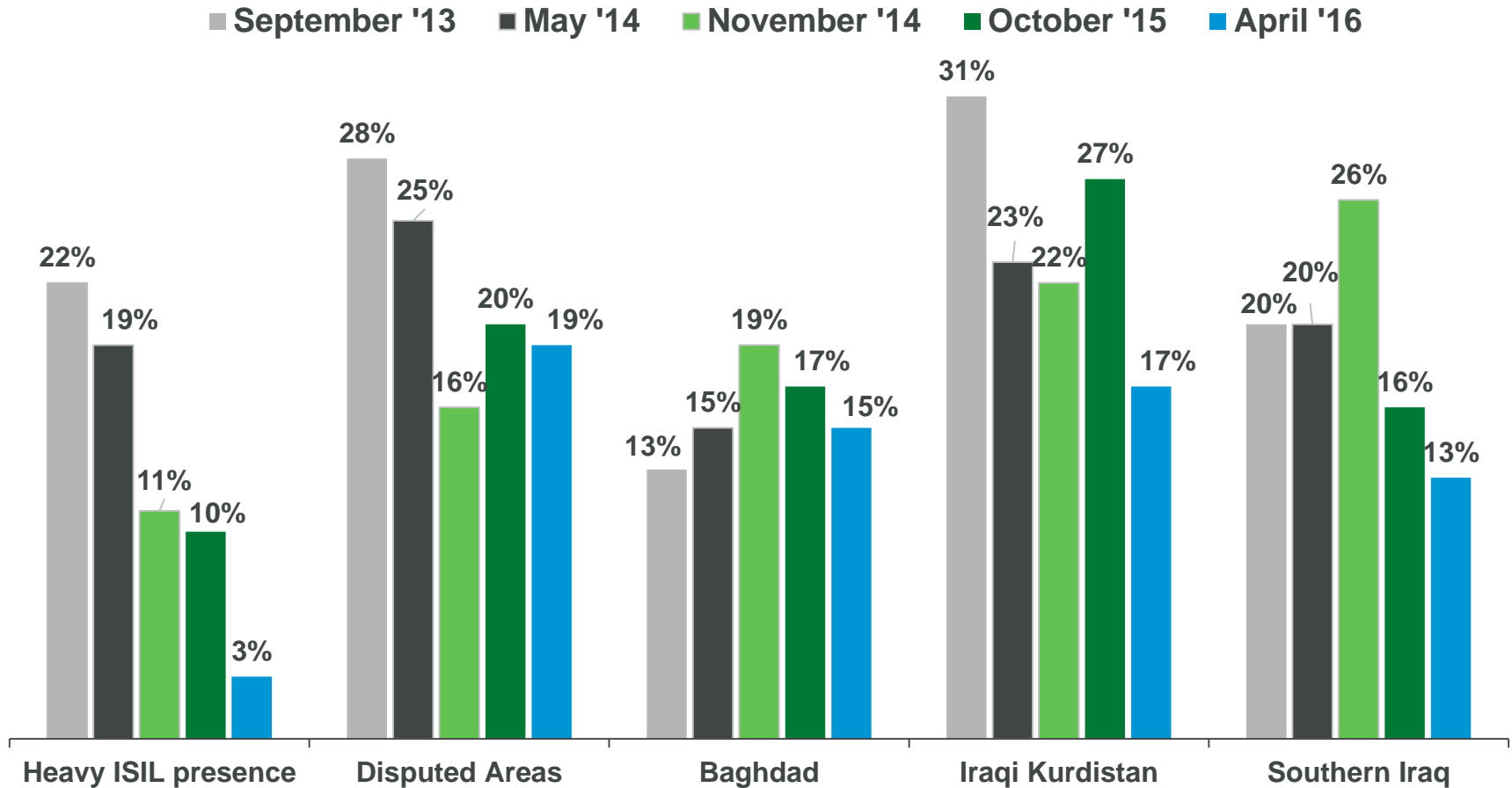


# Measuring Life Evaluation

Gallup tracks the prevalence of three categories based on respondents' present and future life ratings on a 0 to 10 scale:

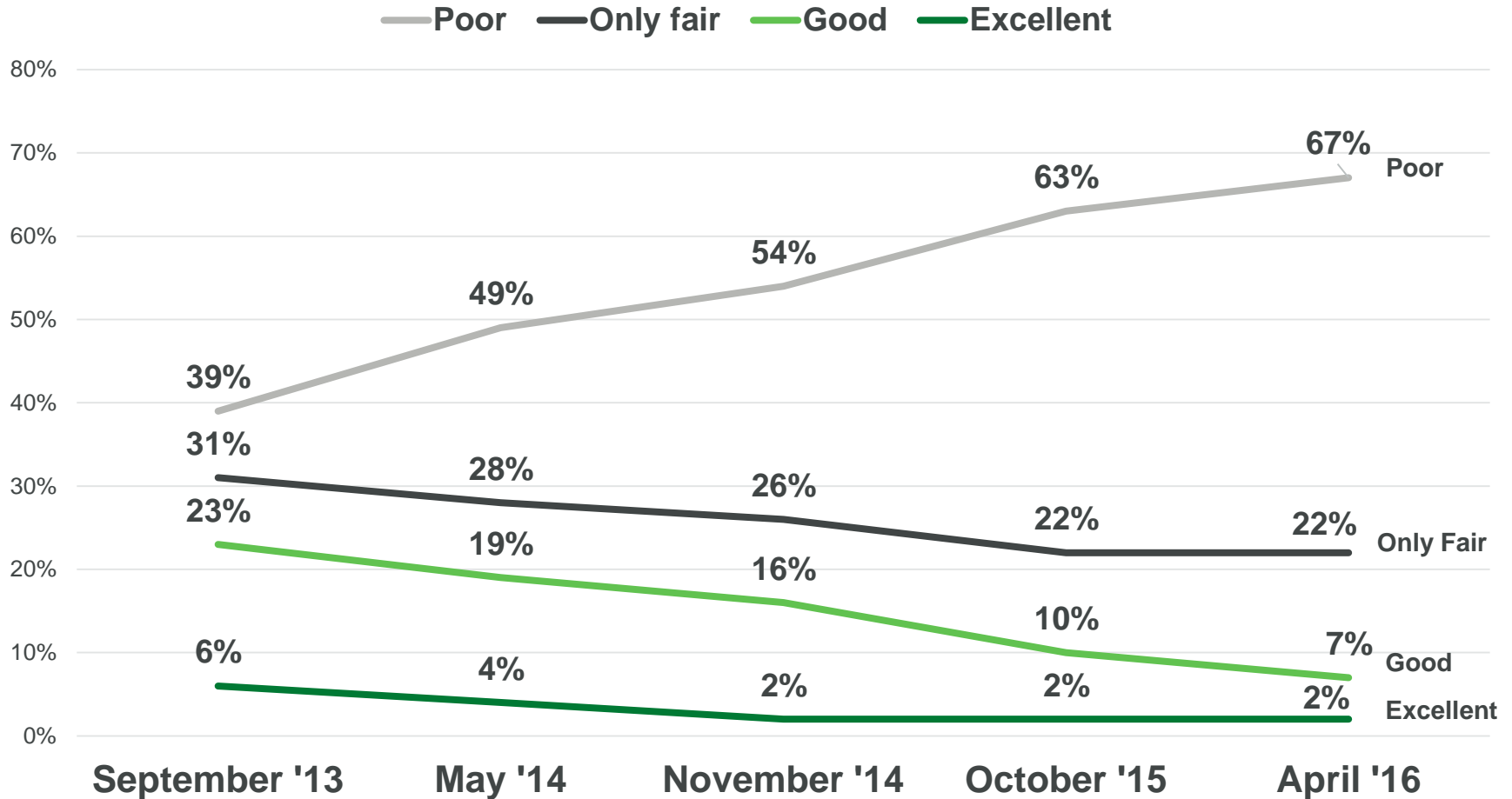
Thriving	Struggling	Suffering
Respondents have positive views of their present life situation (7+) AND a positive view of where their lives will be in five years (8+).	Respondents have moderate to negative views of their present life situation OR moderate to negative views of where their lives will be in five years.	Respondents have negative views of their current life situation (4 or below) AND negative views of where their lives will be in five years (4 or below).

# % Thriving



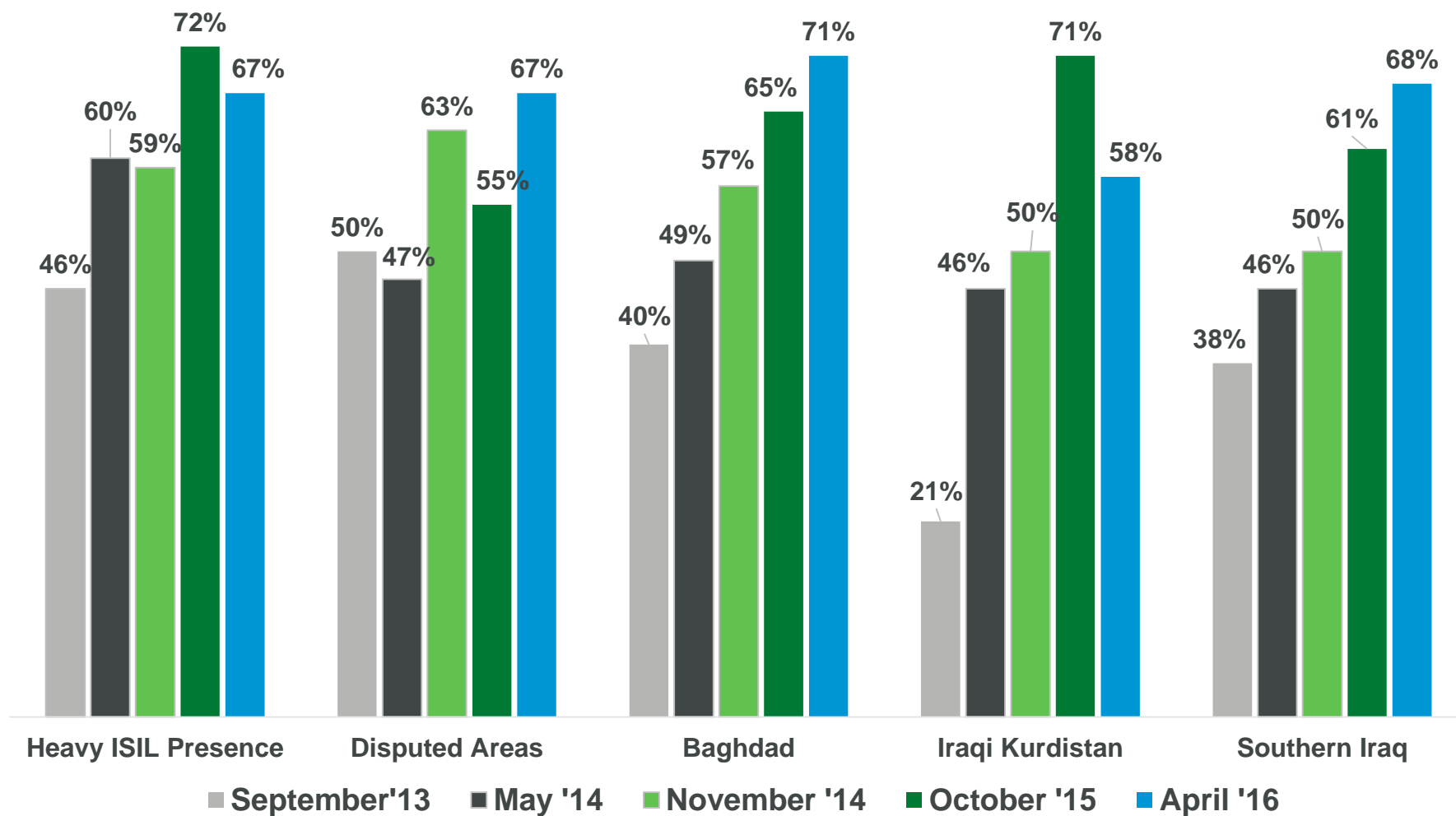
# Economic Conditions

How would you rate economic conditions in this country today: as excellent, good, only fair or poor?



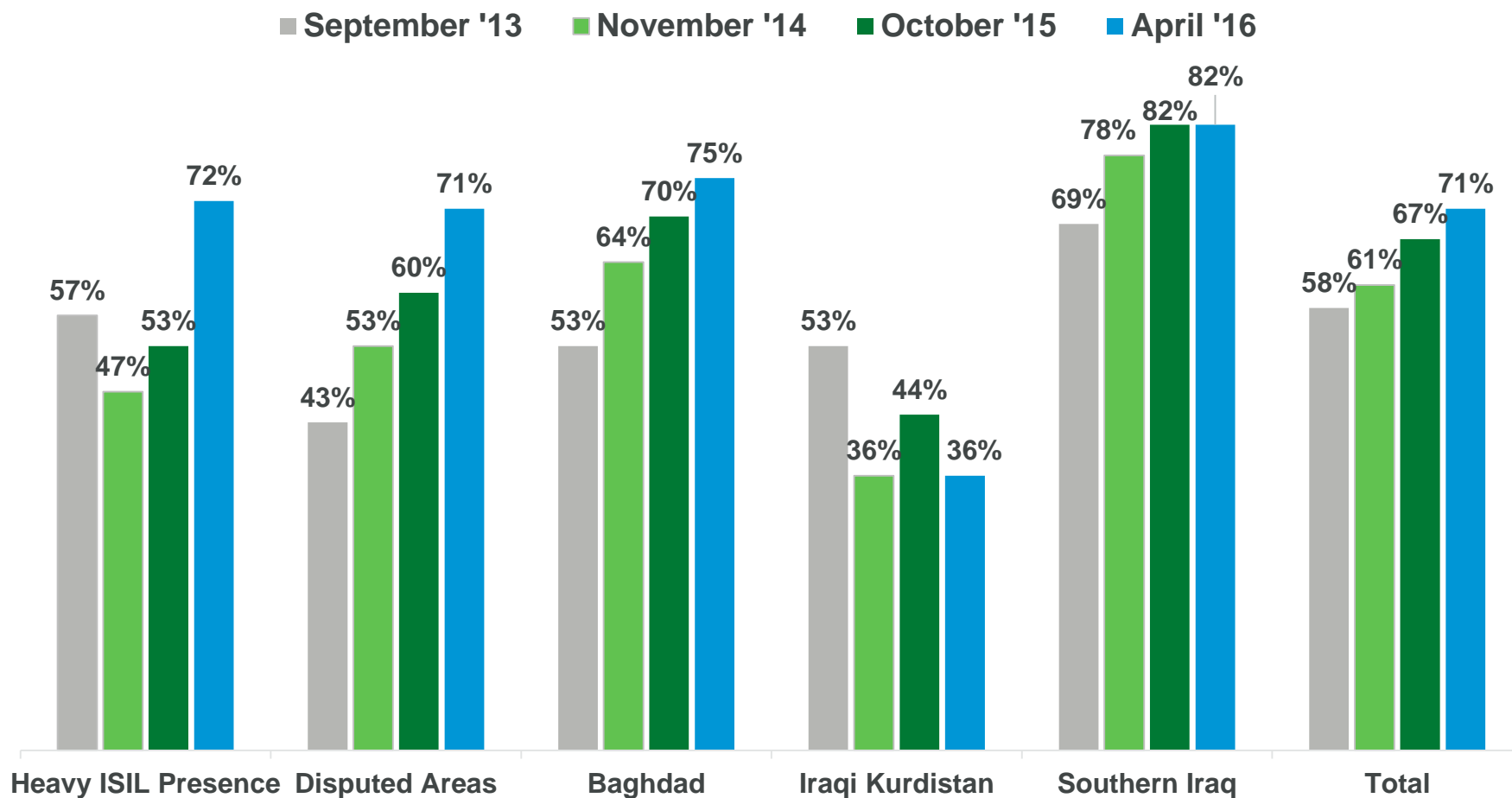
# Economic Conditions

% Poor



# Confidence in Military

In Iraq, do you have confidence in each of the following, or not? How about the military?  
% Yes

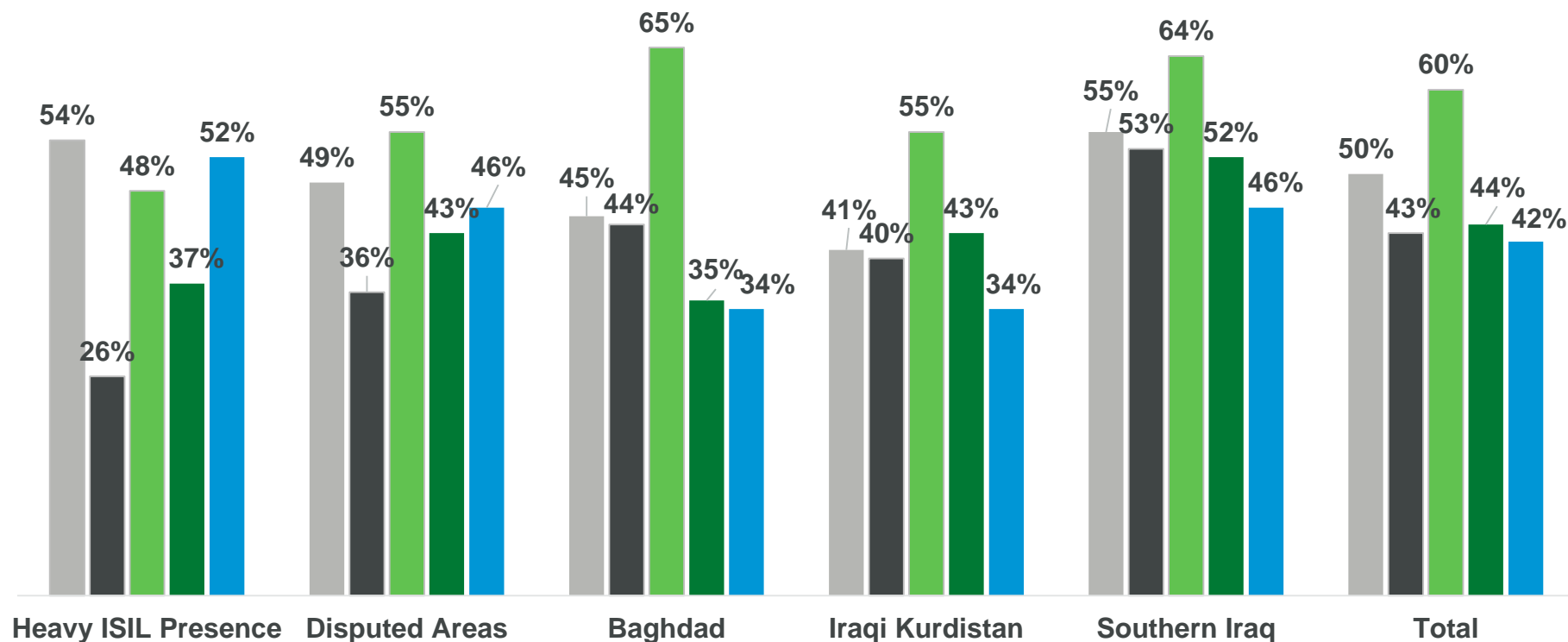


# Confidence in National Government

In Iraq, do you have confidence in each of the following, or not? How about the national government?

% Yes

■ September '13 ■ May '14 ■ November '14 ■ October '15 ■ April '16



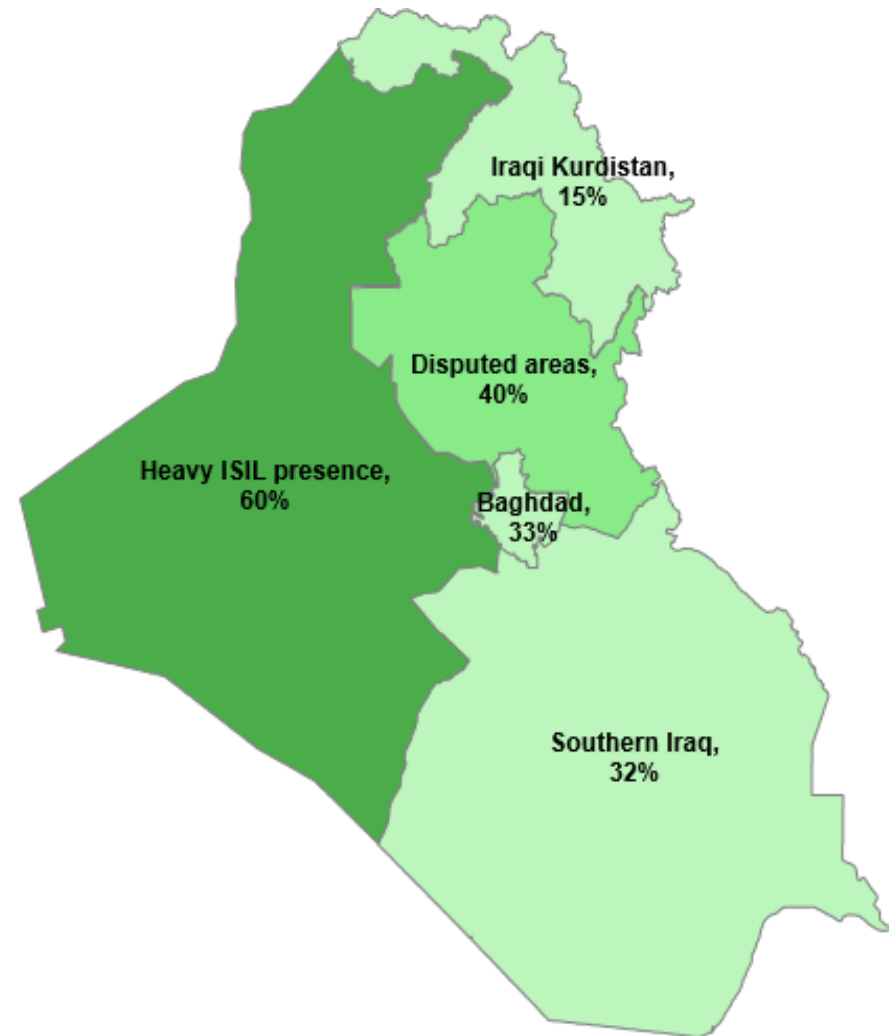
# Approval of Iraqi Prime Minister

Do you **APPROVE** or **DISAPPROVE** of the way Haider Al Abadi is handling his job as prime minister?

November 2014



April 2016



# Key Takeaways

- **Half of Iraqi households** have had times in past 12 months where they **lacked sufficient food and shelter** (First time that a majority of Iraqis have expressed food insecurity)
- Assessments of the **job market** and **national economy** are **the worst Gallup has collected** in the country since 2009
- **Approval of PM Abbadi** is currently **below PM Nouri Al Maliki** before he left office
- **Most Iraqis (67%)** lack confidence in the **honesty of elections**
- Wellbeing and perceptions of national institutions **vary dramatically across regions**



# Media Use in Iraq and Iraqi Kurdistan Region

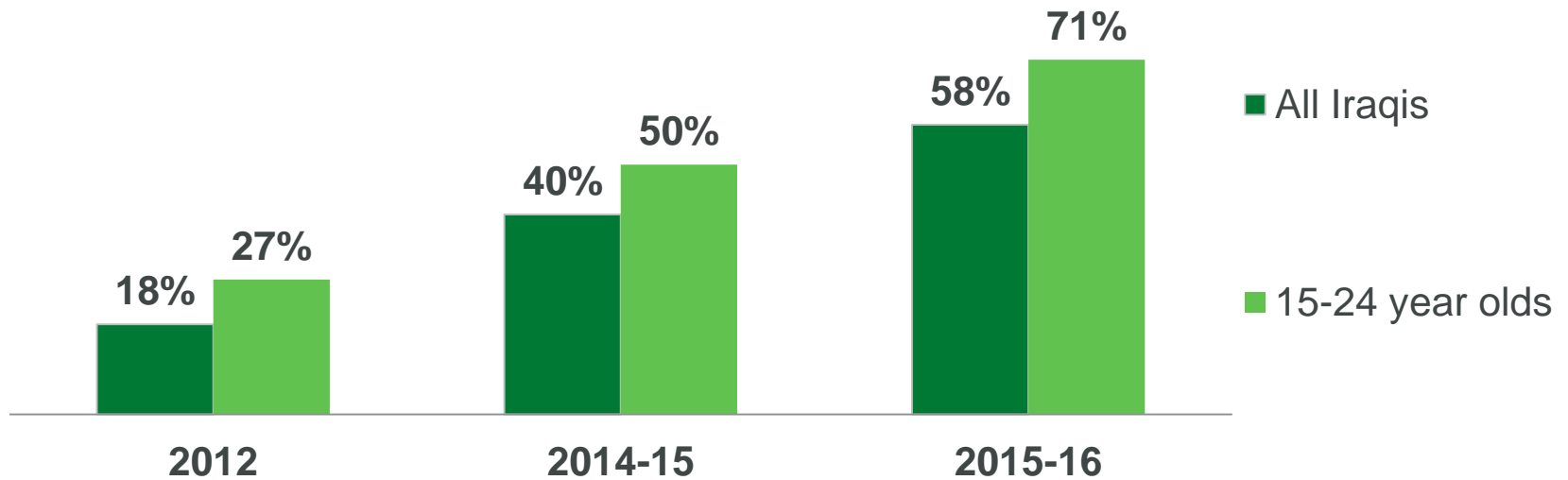
Diana Turecek, Director of Audience Research, Middle East Broadcasting Networks

# Research Methodology

- Computer Assisted Telephone Interviews (CATI)
  - Both landlines and mobile
- Fieldwork December 21, 2015 — January 22, 2016
- Sample size: 2,001
- Representative of all adults living in Iraq and Iraqi Kurdistan Region (ages 15 and older in 19 governorates)
  - 21 million adults
- 2015 focus groups with Iraqi TV viewers in Baghdad

# Internet Use is Increasing Rapidly...

Percent who used Internet in past week



## ...And Use is High Across Provinces

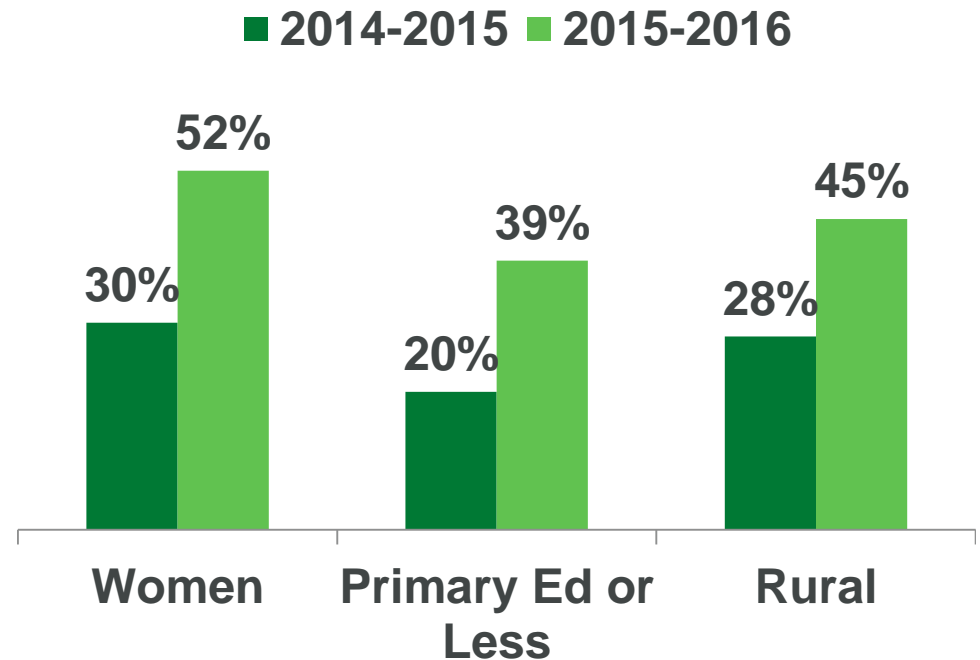
- 50-70% of inhabitants in each province used internet in past week for news.



# Use Increasing Among Traditional Low-use Populations



## Past week Internet use among selected populations

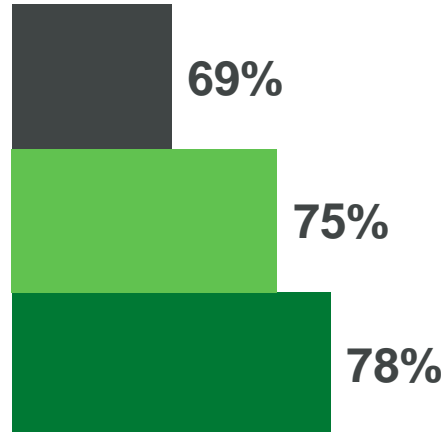


# Iraqis Using Internet Heavily for Several Purposes

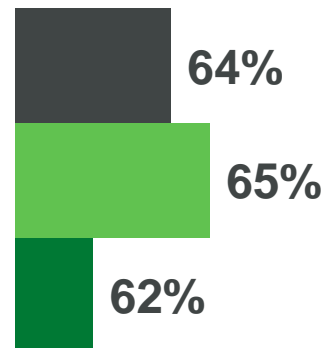
*Percent of past week Internet users nationally and in selected provinces who did each activity online in the past week*

■ All Iraqis (n=1164)    ■ Baghdad(n=336)    ■ Anbar (n=611)

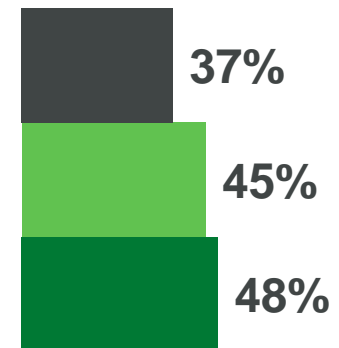
## Watched TV or video



## Used radio or audio



## Used computer or mobile app

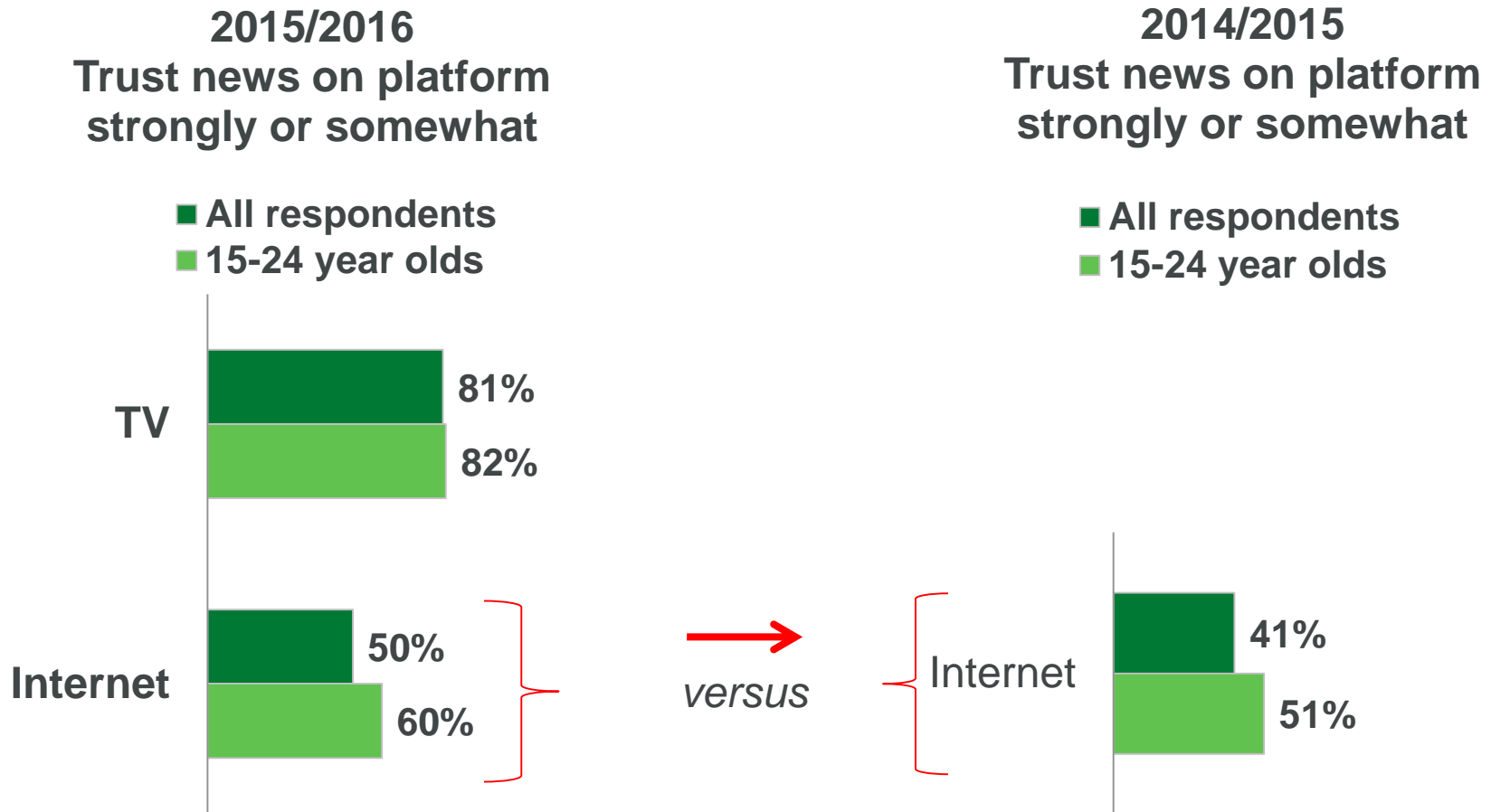


# Facebook and YouTube Popular Across Provinces

- **69-91% of past week**  
**Internet users** in at least 8 of Iraq's 19 provinces used Facebook in past week
- **49-72% of past week**  
**Internet users** in at least 8 of Iraq's 19 provinces used You Tube in past week



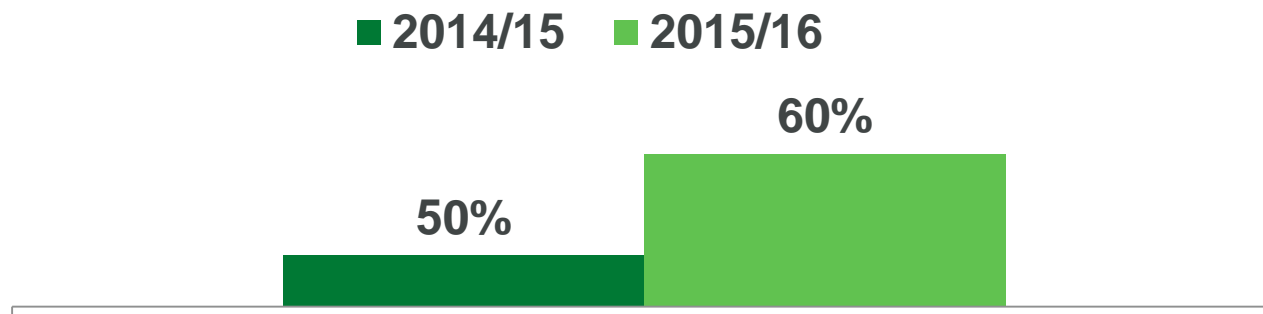
# As More Use the Internet, More Trust It





# Greater Internet Access

## Percent of Iraqis With Home Internet Access

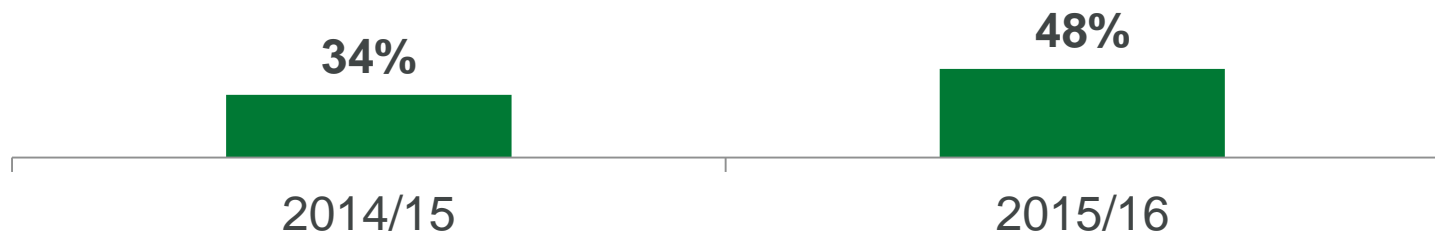


- Access higher in all provinces except for Muthanna, Qadisiya, & Karbala in Southern Iraq
- Use has still increased in Qadasiya and Muthanna

# ...Better Cell Phone Coverage Means Internet Access is More Convenient

- Iraqis have 3G as of 2015

**Percent of Iraqis who used mobile to access Internet in past week**



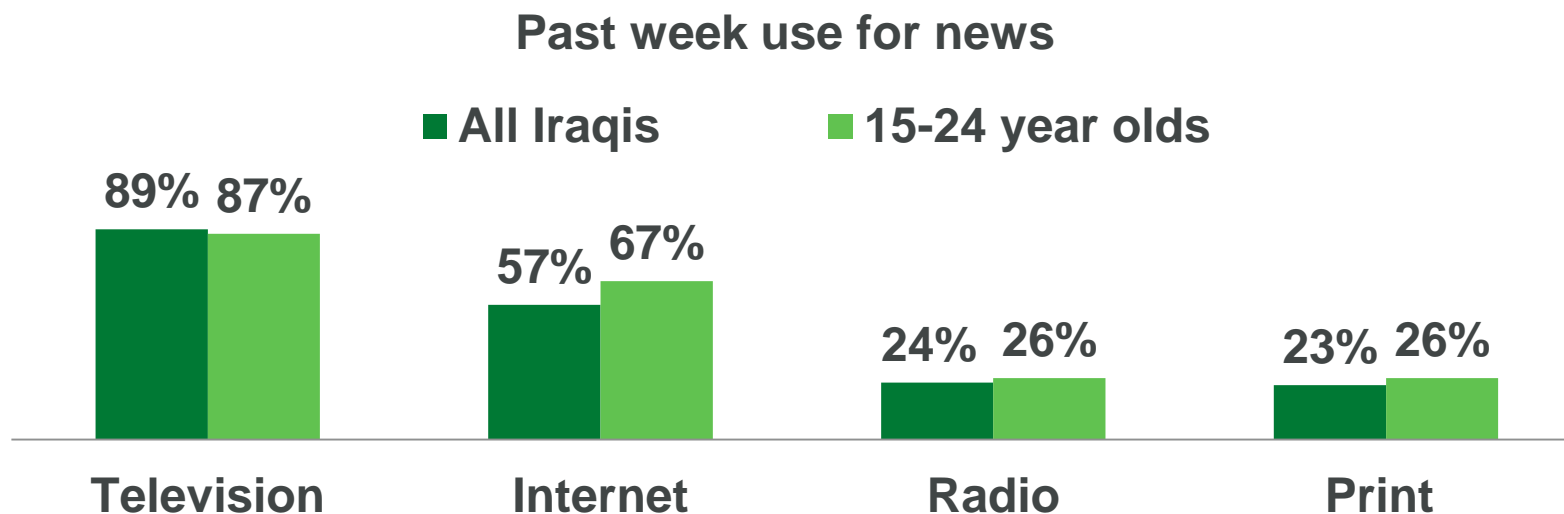
# Political Changes May Play a Role



- Provinces where ISIS has lost territory (Anbar and Sala al Din) have greatest increases in Internet usage.

*\*ISIS executed six people in Mosul in Jan 2016 for using the Internet on cell phones; ISIS requires Internet users to register with names and addresses*

# Television Remains the Most Popular Media Source, Even Among Youth



*I am watching more TV not just because of current events but because citizens have been forced to sit at home fearful of the street and the unknown. (Iraqi male in Baghdad, 2015 focus groups)*

# Internet Not Replacing TV

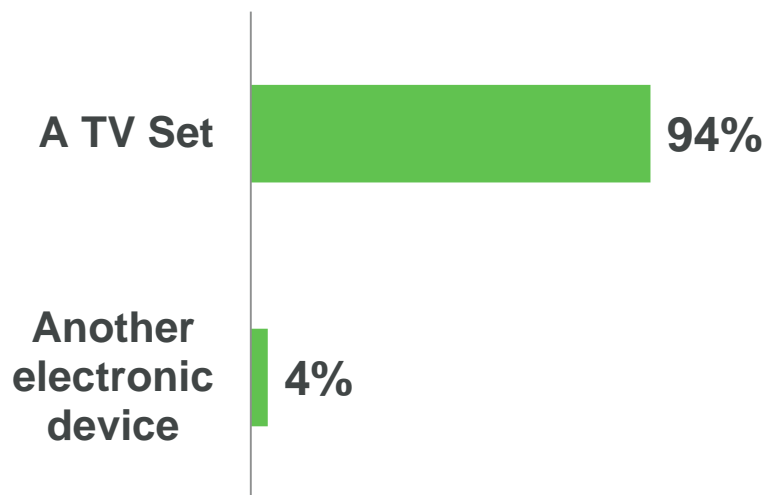
- 89% of past-week Internet users in Iraq also used TV in the past week for news
- 88% of 15-24 year old past-week Internet users used TV in the past week for news.



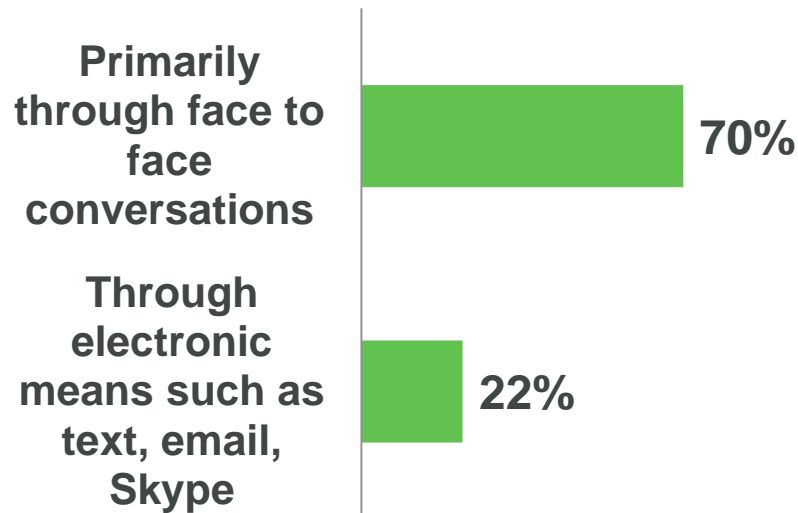
*\*ISIS launched satellite TV station in Mosul, BEIN HD4 in Jan 2016*

# Past Week Internet Users Still Getting News in Traditional Ways

**Do you watch TV primarily via a TV set or primarily with another electronic device? (n=1164)**



**Would you say you exchange news with friends and family... (n=1164)**



*“At the current time, televisions are very developed and big and they work well and watching on a TV is wonderful and much better than (a phone or computer).” – male in Baghdad focus groups*

# Internet Use and Access Could Change

- Many Iraqis using satellite Internet; government trying to cut access in ISIS-controlled areas
- 2014 Iraqi government asks Internet providers to shut down Internet in 5 provinces and block access to Facebook, Twitter, and other social networks
- Cost – Government increased prices of Internet and mobile top up cards in 2015 by 20%



# Key Takeaways

- Internet use is increasing rapidly, but not replacing TV
- Increases vary significantly by province
- Internet trends will change as Iraqi government and ISIS vie for control of media

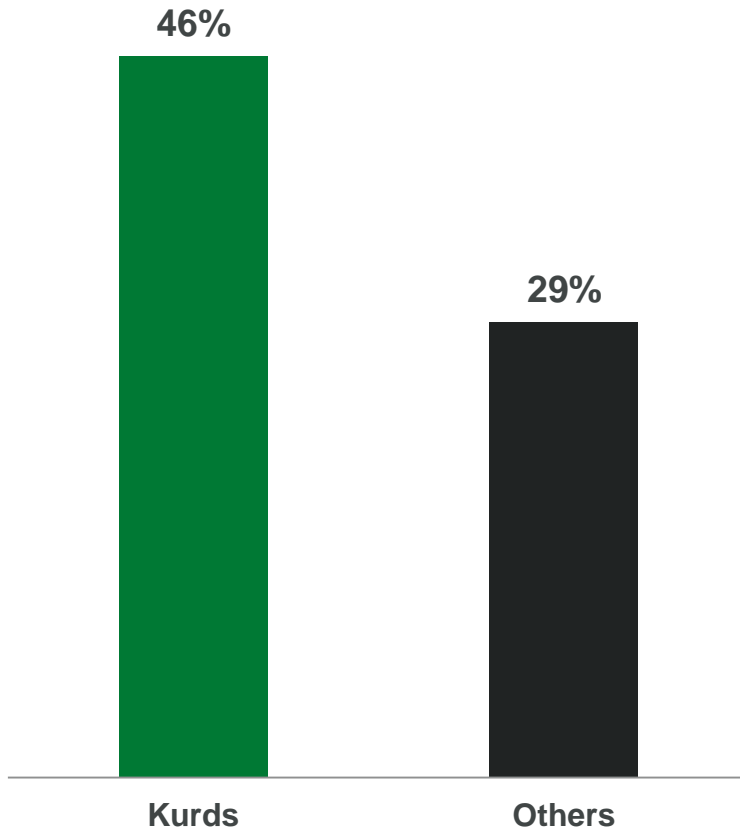


# Media Consumption in Iraqi Kurdistan

Bill Bell, Research Director, Voice of America

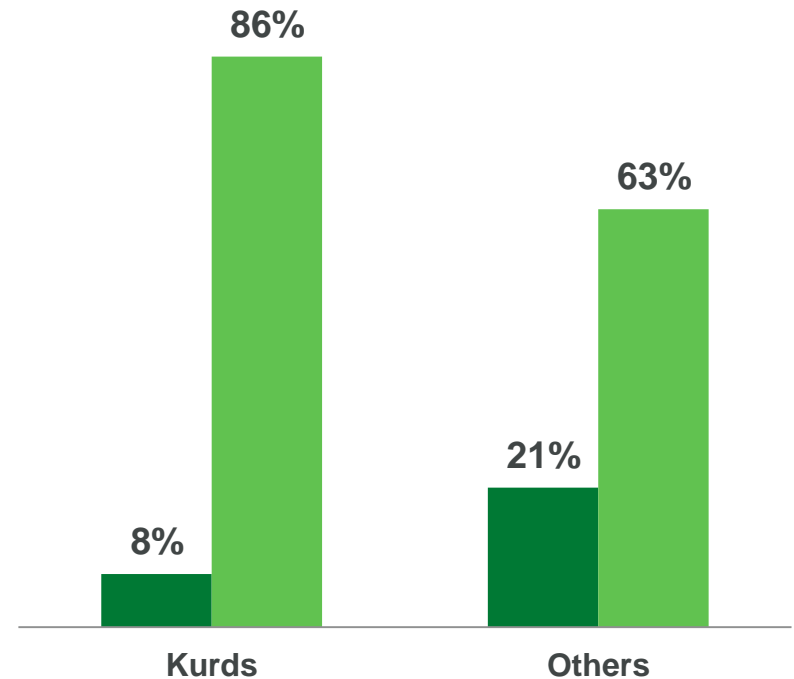
# A Historical Perspective: Iraq 2003

Satellite Dish in household  
% Yes

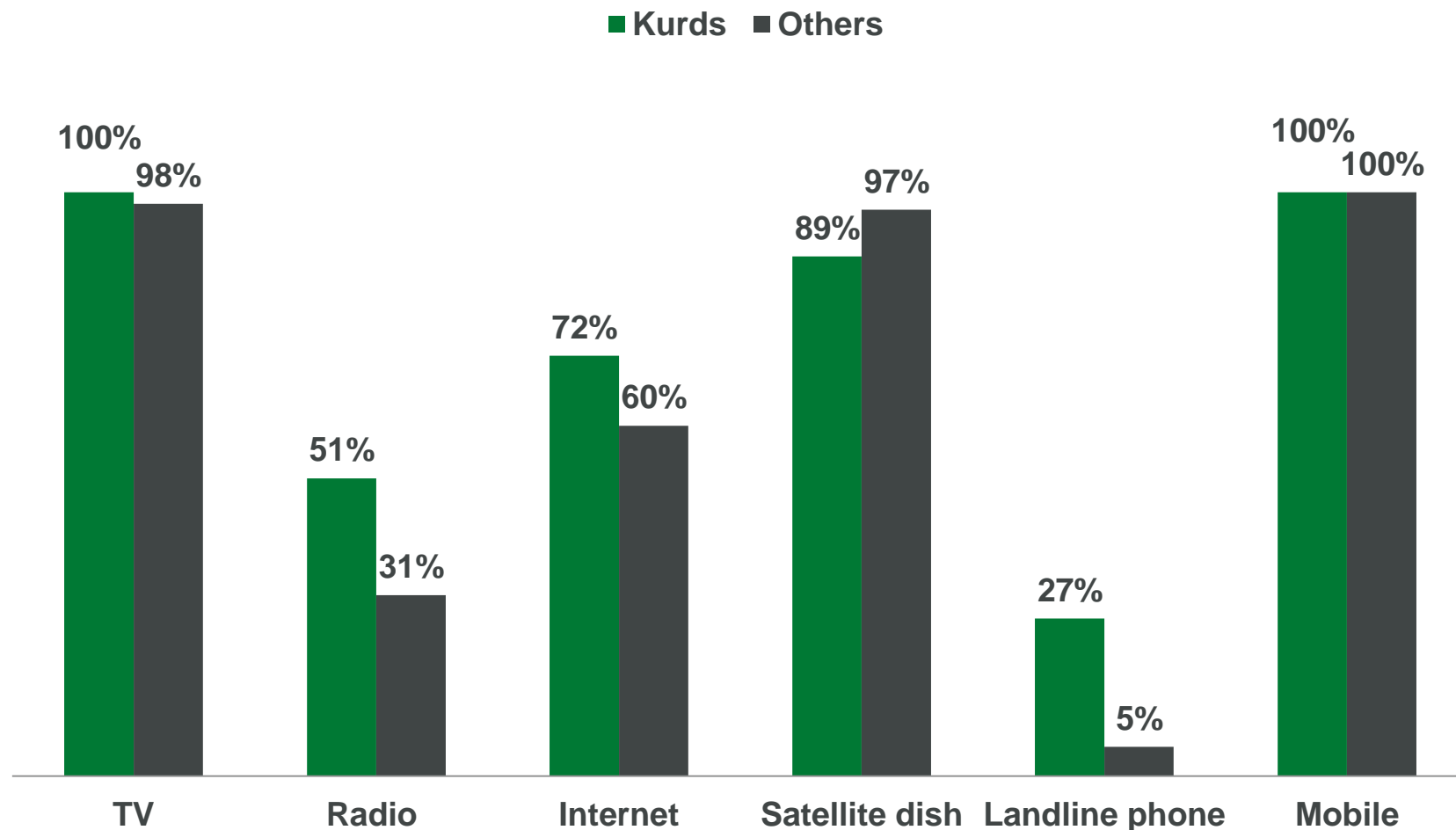


Radio and TV Use for News

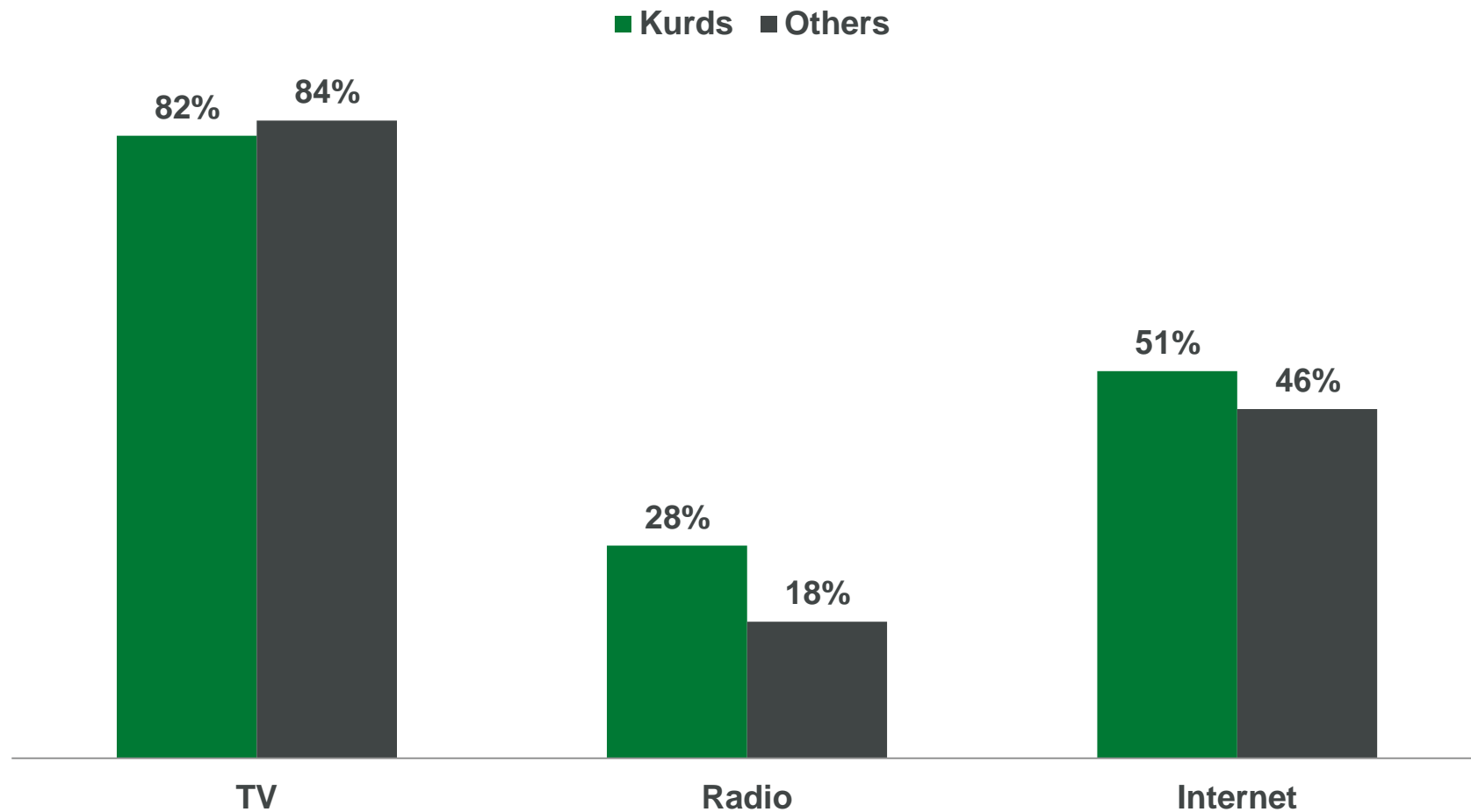
■ % citing radio as most important news source  
■ % citing TV as most important news source



# 2016: Household Ownership of Media Equipment



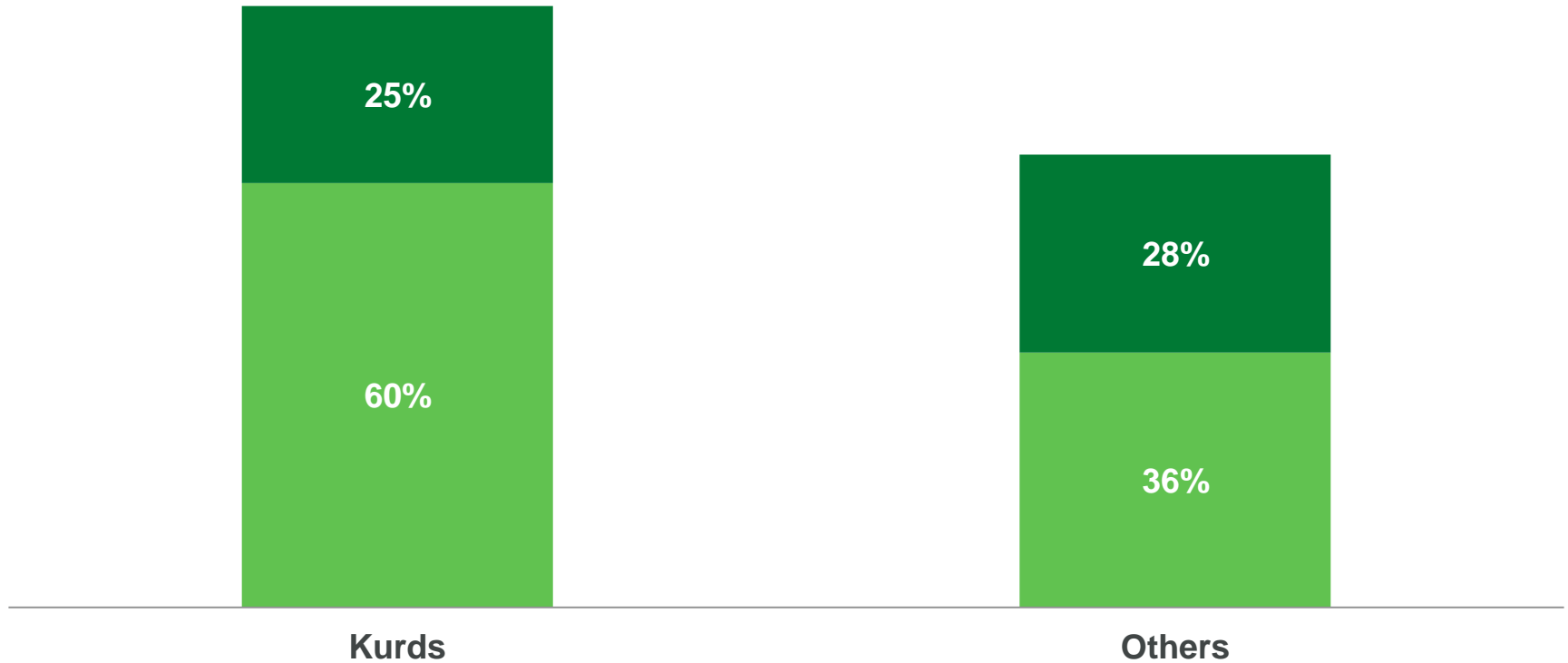
# “Yesterday” Media Usage



# Frequency of News Access

Percentage of respondents accessing news  
once or more than once daily

■ More than once a day ■ Once a day

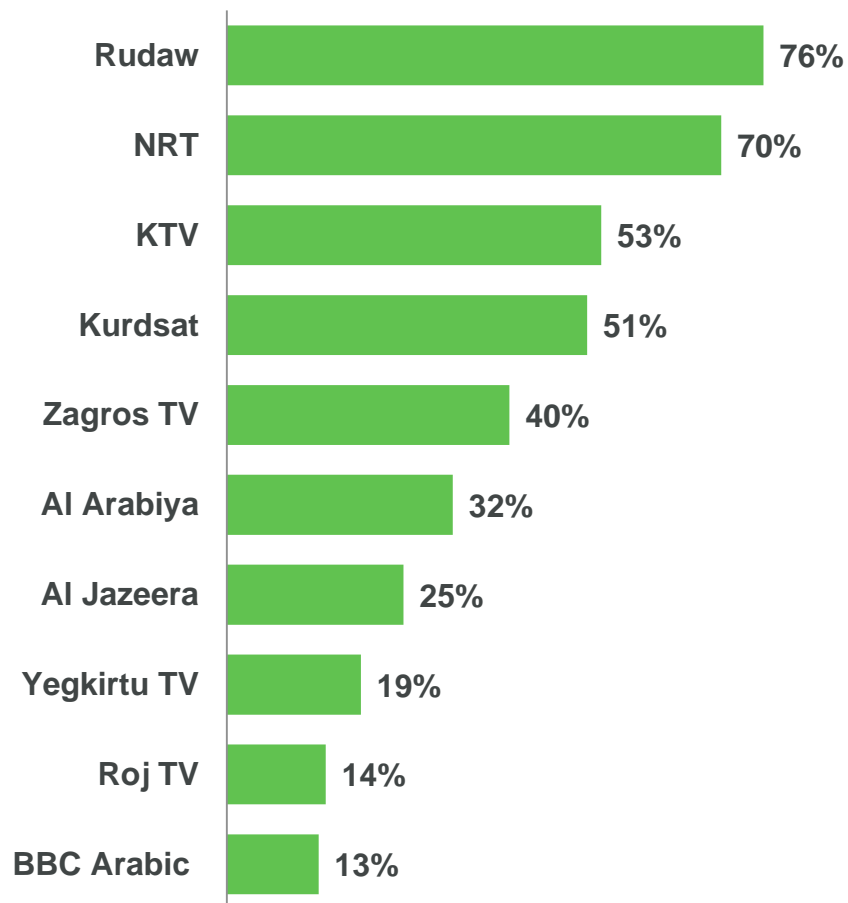


# A Rich Media Environment

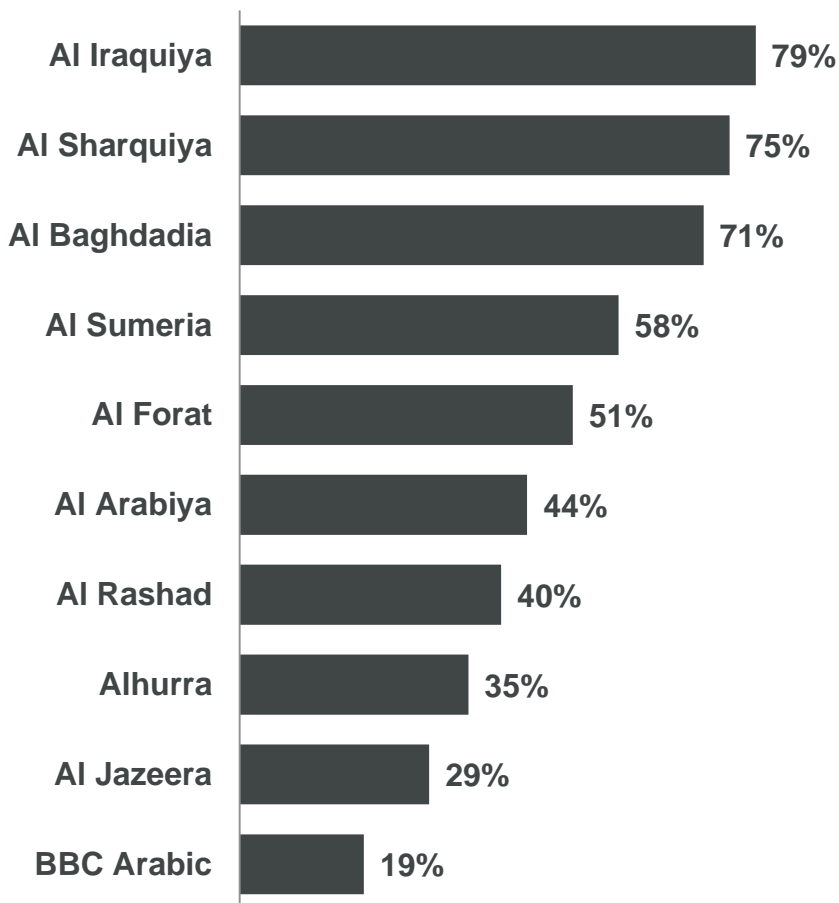


# Past Week Viewing of TV Stations

## Kurds

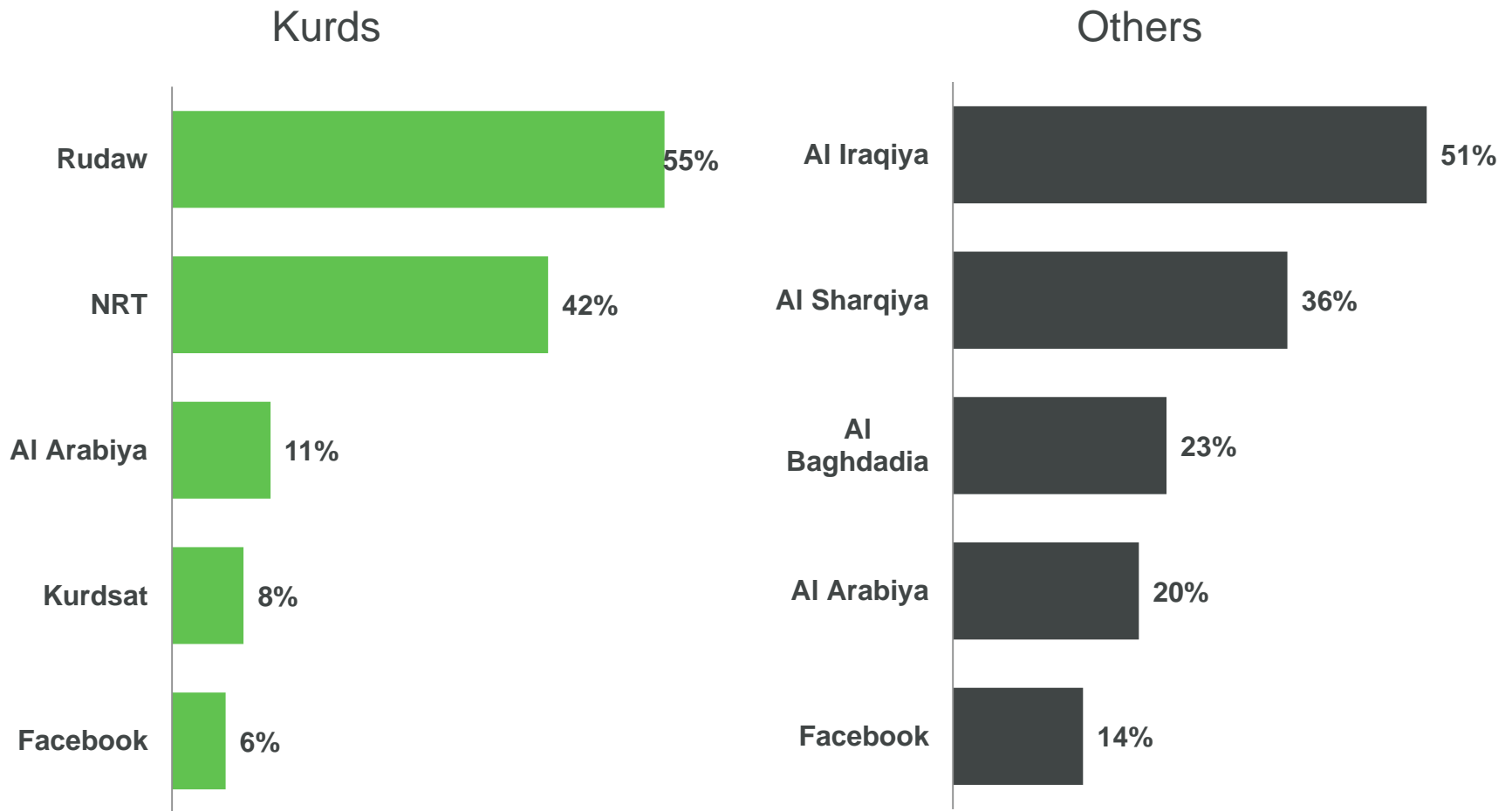


## Others



# Top News Sources

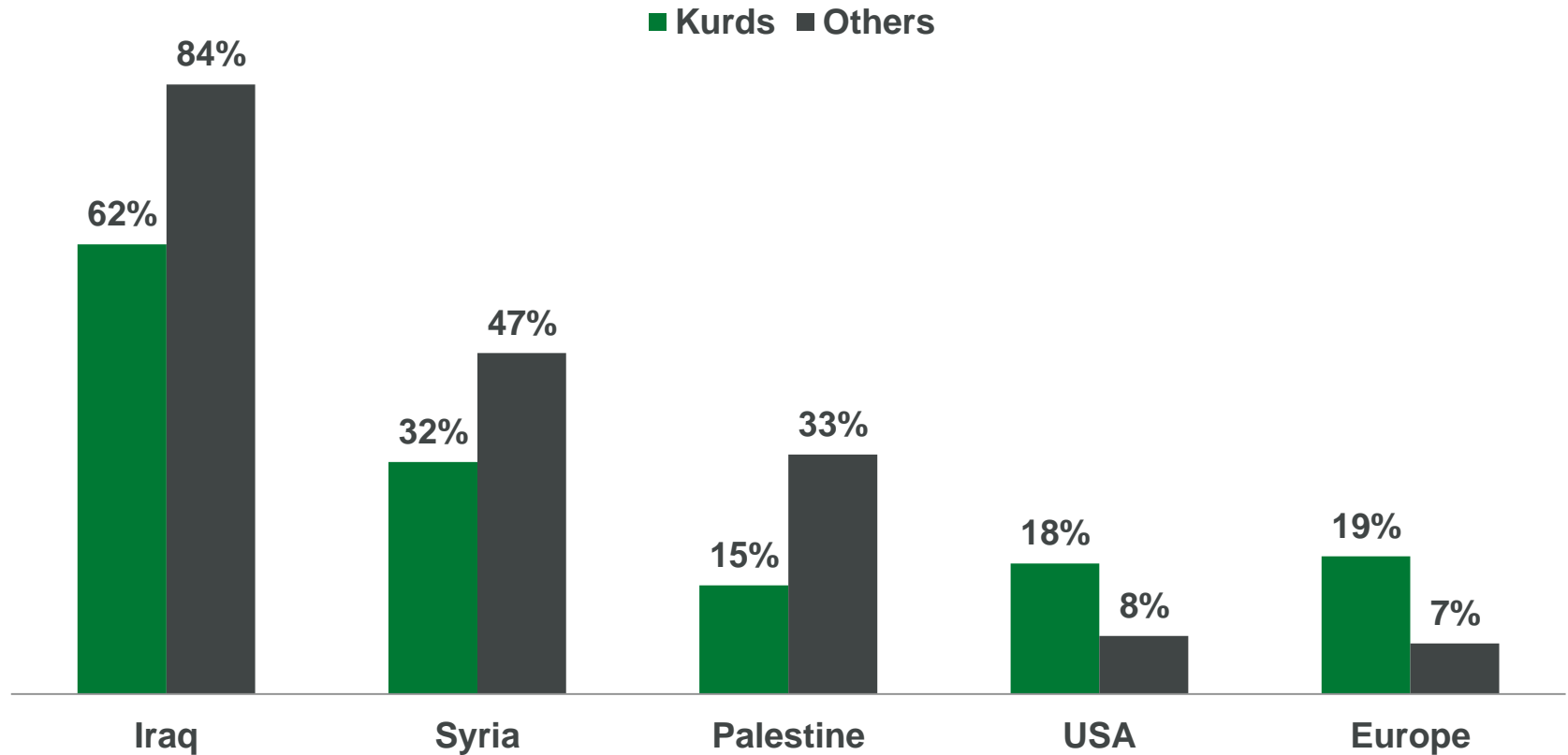
Percentage citing each outlet as one of their top three news sources





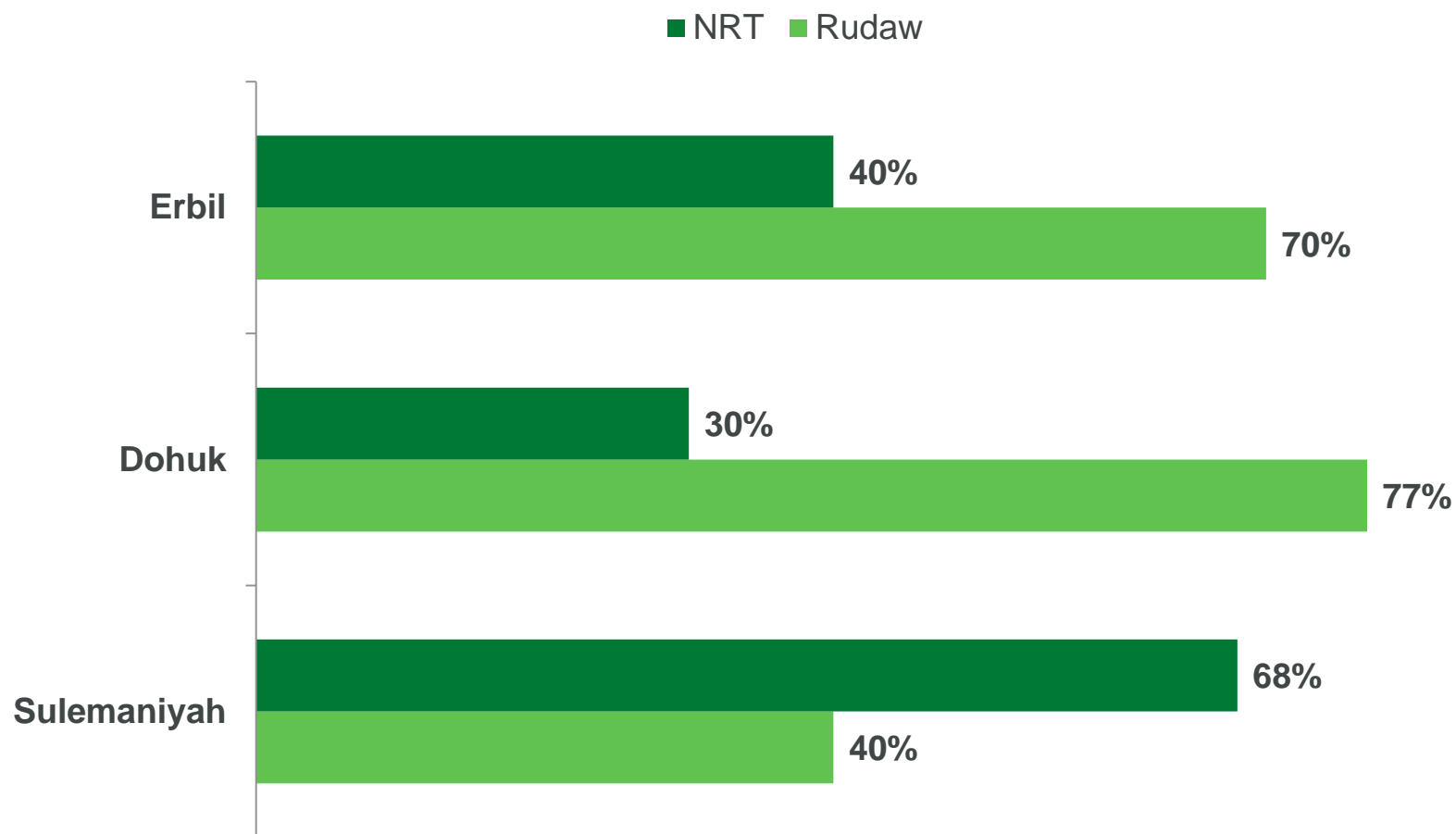
# Interest in News About ...

Percentage of each groups “very interested” in news about each country



# Regional Differences Within Iraqi Kurdistan

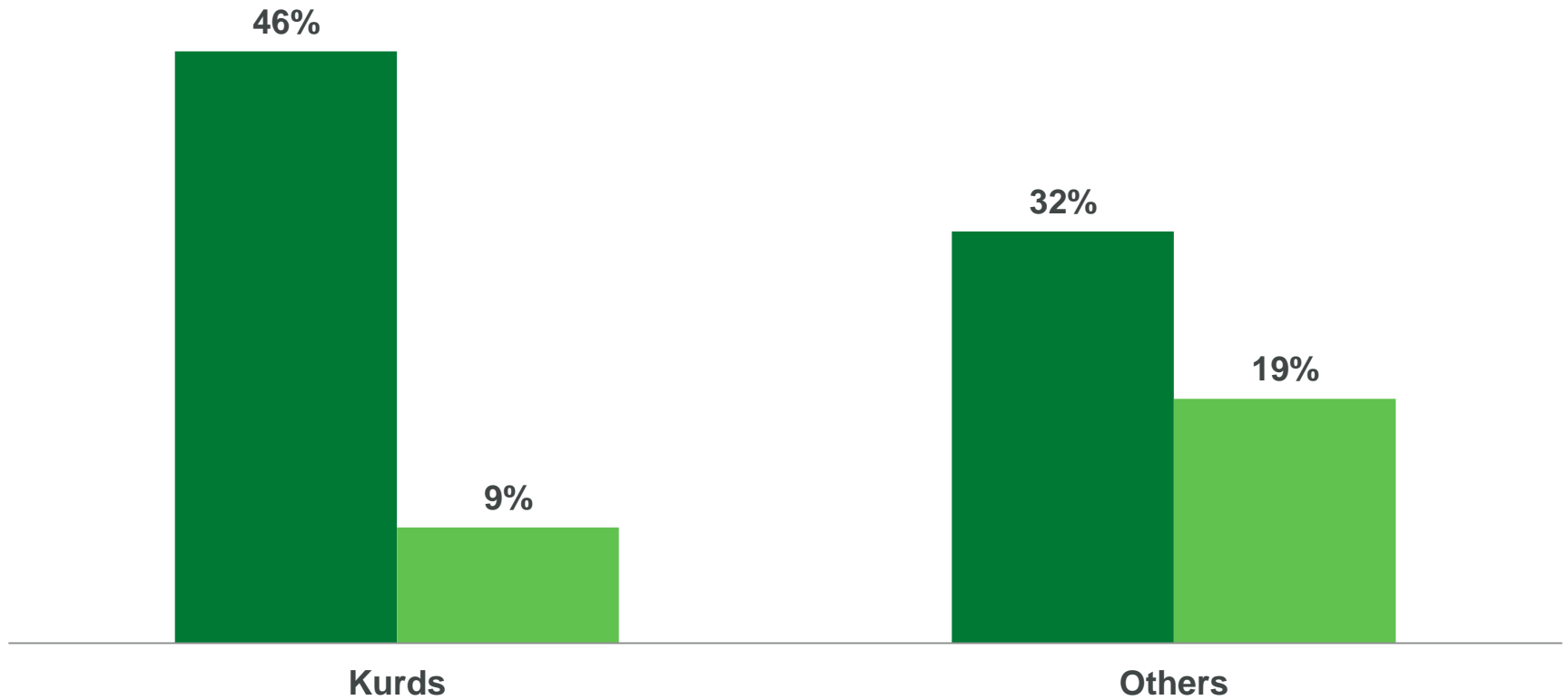
Percentage citing NRT and Rudaw as one of top three news sources, by governorate



# Use of Social Media for News Access

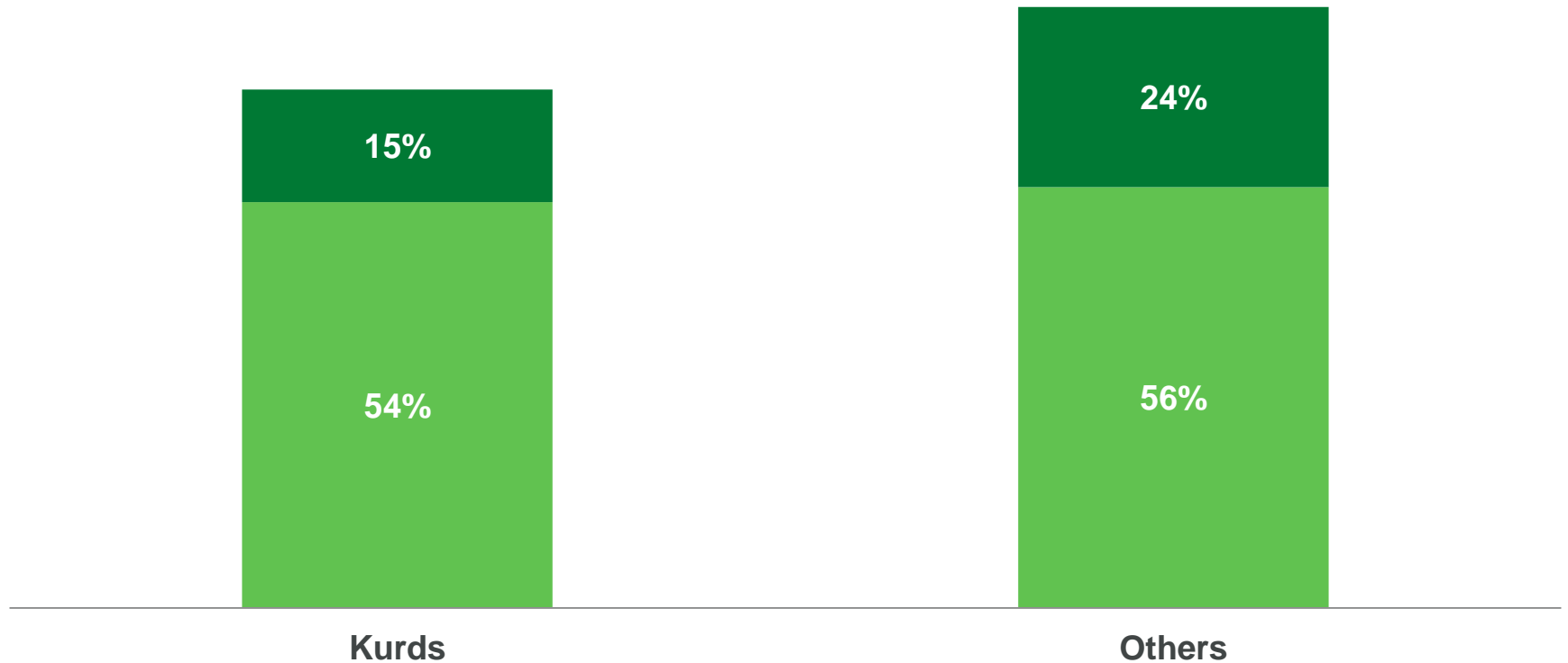
Percentage using Facebook and YouTube at least weekly to access news

■ Facebook ■ YouTube

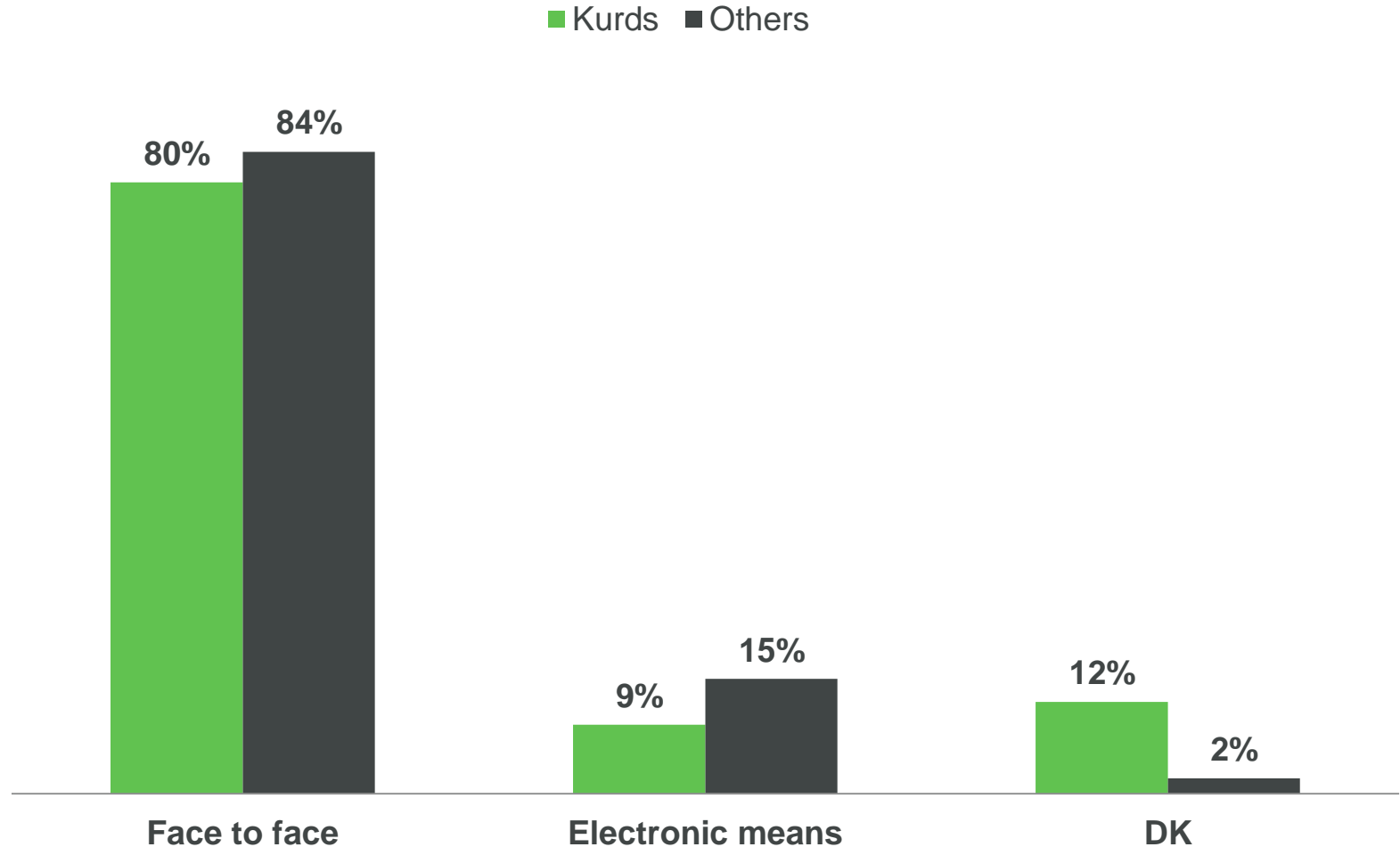


# Frequency of News Sharing with Family, Friends, Relatives

■ Daily or most days   ■ At least weekly



# For Those Who Share News, What Mode Do You Use the most?



# Conclusions

- Kurds live in a different media environment and rely primarily on Kurdish language TV
- Differences in substantive interests.
- Historical differences in media access between Iraqi Kurdistan and rest of Iraq have disappeared
- Facebook and other forms of social-media based news sharing are increasingly important

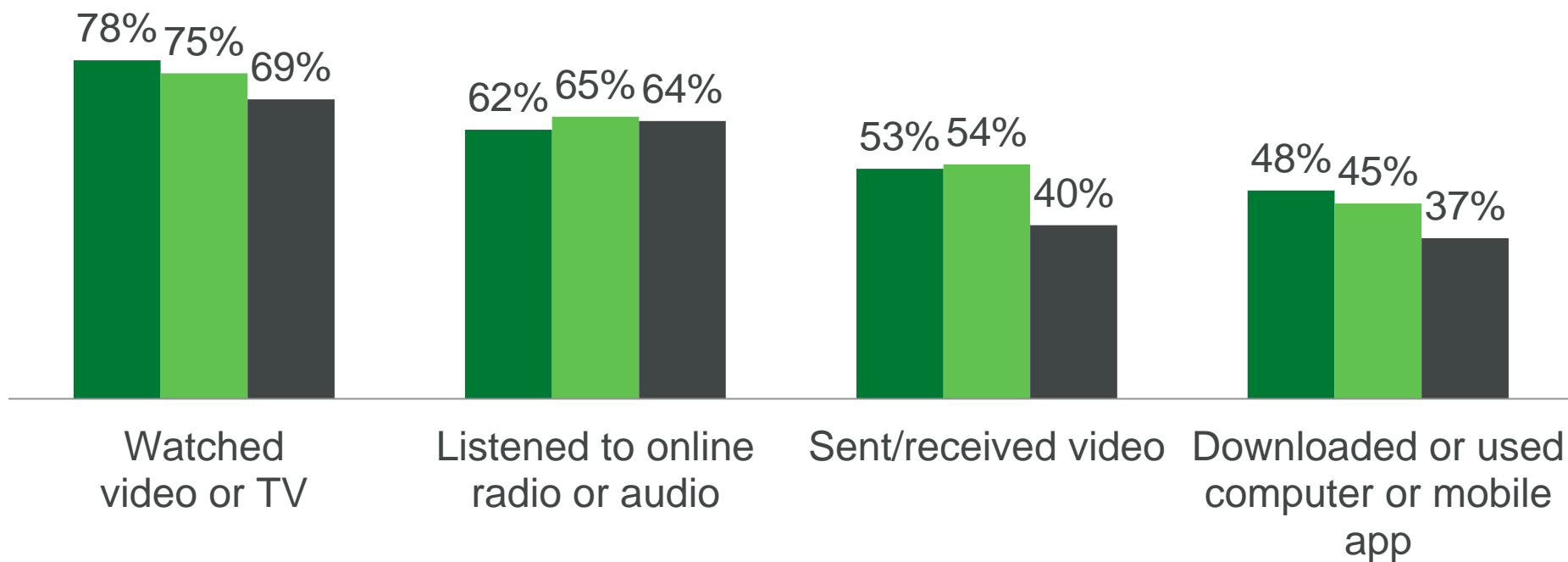
# Appendix

## Additional media data

# Iraqis Using Internet Heavily for Several Purposes

**Percent of past-week Internet users nationally and in selected provinces who did each activity online in past week**

■ All Iraqis (n=1164) ■ Baghdad(n=336) ■ Anbar (n=611)

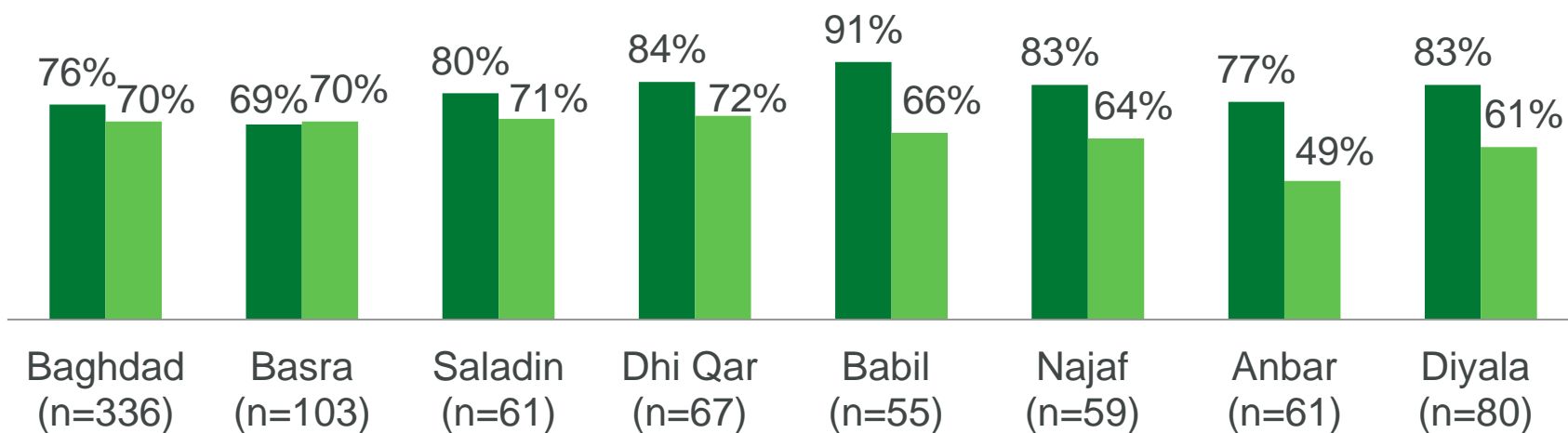




# Facebook and YouTube Popular Across Provinces

**Iraq: Percentage of past-week Internet users in each province who used Facebook and YouTube in past week**

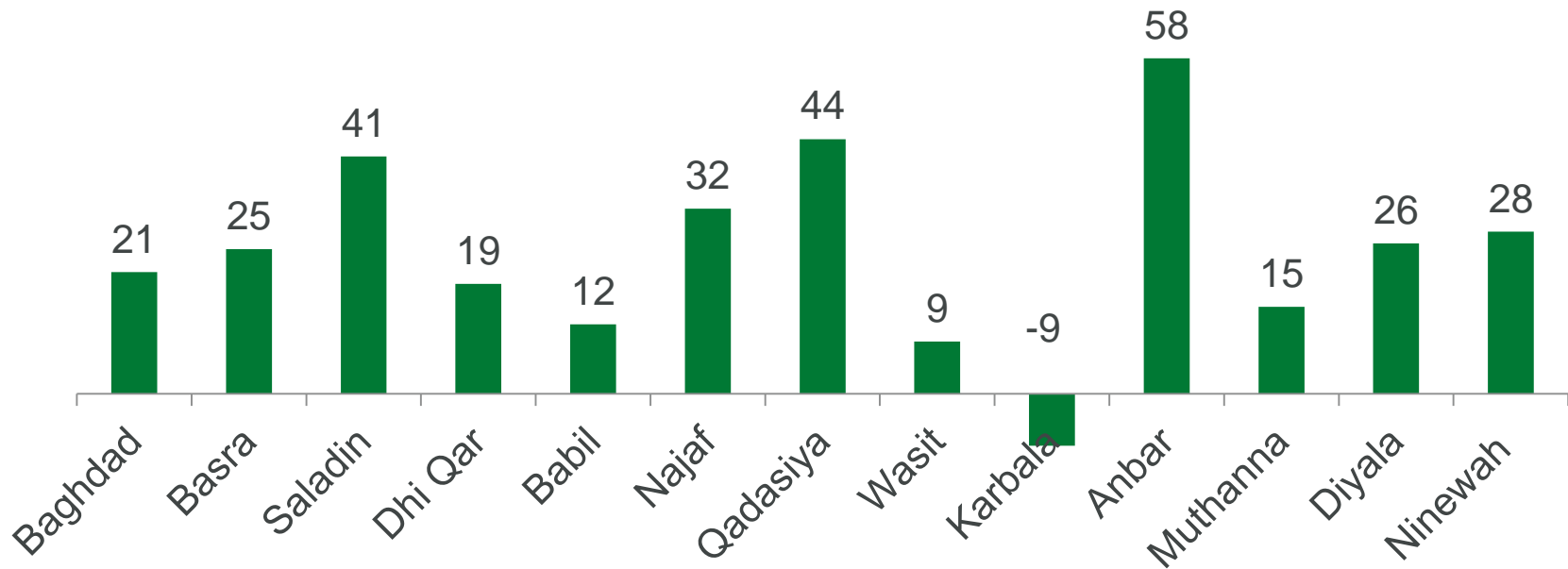
■ Facebook ■ YouTube



- In Baghdad, 93% used mobile to access Facebook in past week; 31% used a computer

# Changes in Internet Usage

**Iraq: Percentage Point Change in Past Week Internet Reach by Province (2014/15-2015/16)**

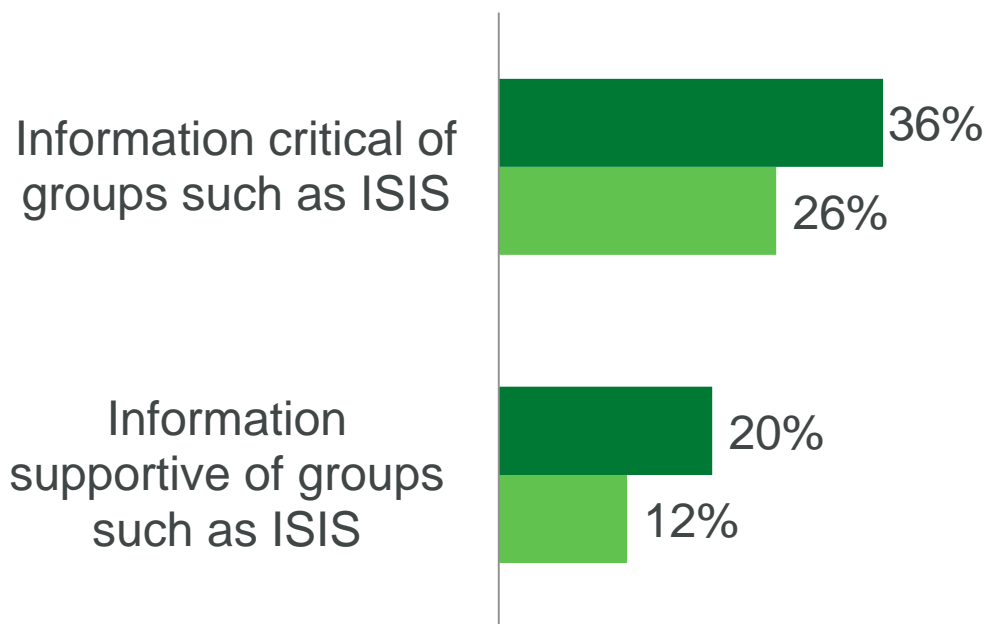


# Internet Users versus TV Users

- Internet users not getting more ISIS propaganda than TV users

**How frequently do you hear about the following topics in the media?  
At least several times a day.**

- Used TV past week not internet (n=699)
- Used internet past week not TV (n=106)



# Copyright Standards

This document contains proprietary research, copyrighted materials and literary property of Gallup, Inc. It is for the guidance of your organization only and is not to be copied, quoted, published or divulged to others outside your organization. All of Gallup, Inc.'s content is protected by copyright. Neither the client nor the participants shall copy, modify, resell, reuse or distribute the program materials beyond the scope of what is agreed upon in writing by Gallup, Inc. Any violation of this Agreement shall be considered a breach of contract and misuse of Gallup, Inc.'s intellectual property.

This document is of great value to Gallup, Inc. Accordingly, international and domestic laws and penalties guaranteeing patent, copyright, trademark and trade secret protection safeguard the ideas, concepts and recommendations related within this document.

No changes may be made to this document without the express written permission of Gallup, Inc.

Gallup is a trademark of Gallup, Inc. All rights reserved. All other trademarks and copyrights are property of their respective owners.