



## Agenda

### Introductions & Welcome

Chris Stewart,  
*Partner, Gallup*

### Findings From the World Poll

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

### Media Use in Iraq and Iraqi Kurdistan Region

Diana Turecek,  
*Director of Audience Research,  
MBN*

### Media Consumption in Iraqi Kurdistan

Bill Bell,  
*Research Director, Voice of  
America*

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### Media Use in Iraq and Iraqi Kurdistan

Iraq and Iraqi Kurdistan boast the fourth-largest population of any Arab country (after Egypt, Algeria, and Morocco), and one of the most robust domestic news media markets in the region. With dozens of daily newspapers, radio stations, and TV channels serving the country and home satellite service ubiquitous, most Iraqis and Kurds have a wide range of news options. Ongoing sectarian conflict and political control of many Iraqi media organizations, however, hampers the population's access to reliable, objective news content.

#### 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.

#### 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.

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.

#### 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.

#### BILL BELL

As Director of Research at the Voice of America, Bill Bell is responsible for overseeing a global program of research and evaluation on behalf of that organization. Bill has spent much of the past 20 years engaged in audience research activities for various elements of the Broadcasting Board of Governors and played a key role in bringing a culture of research and accountability to BBG's programming, planning, and performance assessment activities.

Bill founded the International Broadcasting Bureau's Office of Research in 1995 and led that office until 2014, overseeing hundreds of research projects around the world and advising IBB and BBG management on global media trends. Prior to 1995, Bill served as Deputy Director of VOA's Office of Affiliate Relations and held the same position in the Office of Policy in Worldnet TV at the U.S. Information Agency. Bill began his career as a Foreign Service Officer, serving in Cameroon and New Zealand before returning to Washington.

Bill holds an M.A. from the University of Maryland in survey methodology and from the Fletcher School of Law and Diplomacy in international relations.

# Media Use in Iraq and Iraqi Kurdistan

# BBG & Gallup

## GENERAL MEDIA ENVIRONMENT

As in much of the Arab World, satellite TV is almost ubiquitous in Iraq and Iraqi Kurdistan, present in 97.9% of households (versus 31.5% with radio and 60.1% with the internet). Ethnic Kurds and those with a college degree are much more likely than other Iraqis to have internet access at home. More than nine in 10 Iraqis (92.2%) have their own mobile phone, and 35% have accessed the internet via mobile device in the past week.

The ongoing conflict has displaced many residents and has hindered their access to TV, radio, and the internet. More than one-third (36.0%) of Iraqis say that they have been “displaced” in the past 12 months due to instability.

Despite the disruptions, Iraqis and Iraqi Kurds remain frequent news consumers. Almost 40% (37.6%) access news several times a day, while an additional 27.5% access it at least once a day. More than half (55.3%) share news with family, relatives, or other people at least daily. Weekly users of international news media are even more likely to access and share news daily.

## TELEVISION

TV is the primary source of news in Iraq and Iraqi Kurdistan, with almost nine in 10 (88.8% adults saying they watch TV news at least weekly. Friends and family is the only other source from which a majority of Iraqis (81.0%) get news weekly or more. About one-third get news from the radio and print media at least weekly.

While the three most popular TV stations nationally in terms of past-week reach are Al Iraqiya (72.5%), Al Sharqiya (69.9%), and Al Sumeria (53.1%), politics and sect strongly affect TV viewership. Second place Al Sharqiya TV, as well as other top Sunni-oriented channels Baghdadia TV and Al Arabiya do much better in the ISIL-controlled and disputed areas, which have much higher proportions of Sunni Arabs. Sunni Iraqis have frequently criticized Al Iraqiya, for example, as being biased against them and/or overly friendly to the Shia-led government.

## SOCIAL MEDIA

Half (48.4%) of Iraqis have used Facebook in the past week and 67.1% of these have used Facebook in the past week for news. Most of those using Facebook for news in the past week say they use it at least three hours per week or more for this purpose. Almost 40% (39.6%) have accessed YouTube in the past week and 45.4% of those have used YouTube in the past week for news.

## METHODOLOGY

This data is based on 2,500 landline and mobile telephone interviews with adults aged 15 and older living in Iraq with access to a landline or mobile telephone. Trained interviewers conducted the fieldwork Dec 21, 2015 – Jan 22, 2016, in Arabic and Kurdish with Iraqi adults in all 18 provinces. Results represent approximately 21, 035,000 adults living in Iraq and Iraqi Kurdistan. Researchers stratified the target population by governorate.

The total target population was stratified by governorate. Out of a total sample of 2,500 interviews, 2,000 were distributed proportionally across all 19 governorates.

To achieve the goal of 500 interviews with Kurdish-speaking respondents, approximately 500 booster interviews were completed in the four governorates where the majority of the Kurdish population lives: Sulaymaniyah, Erbil, Halabja and Dahuk. Researchers weighted all post-stratification results by age, gender and education.

## RADIO

More than one-third of Iraqis and Iraqi Kurds (36.0%) report listening to the radio in the past week and 23.9% of Iraqis use it weekly for news. Weekly radio use is most common among men, better-educated Iraqis and Kurds. Most past-week listeners (59.7%) say they tune in via FM, though one in five (19.2%) use AM and 10.1% use shortwave.

## MOBILE PHONE

Virtually all adults (90.9%) own a mobile phone, and almost half of the population (47.5%) has used a mobile phone to access the internet in the past week.

## INTERNET

More than half (58%) report having accessed the internet in the past week. That figure rises to 64% among Iraqi men and to almost 90% (87%) among those with university education or higher.

Internet users are using the internet for a variety of activities. Three-fourths of weekly internet users (78%) went online to view videos such as TV programs, news reports, video clips, sports or movies. In contrast, 28% went online to chat with Skype or a similar site.

Men, young adults and the better educated are most likely to get news online but use of is increasing among women and those with primary educations as well.

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 Marti).

**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.

## CONTACT

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