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# **Audience Analysis**

## **The Role of Journalism and Social Media in the Consumption of News in Iraq**

**2011 Iraq Media Study**

November 2011



## Research Objective

The International Research & Exchanges Board (IREX) of Washington, DC, commissioned D3 Systems, of McLean, VA, to research Iraqi citizens in order to obtain information on media usage across demographic and psychographic variables. This research may be used by media outlets to improve their responsiveness to the Iraqi audience and inform their sales and marketing strategies. In addition, advertisers may use the research to inform their media purchasing strategies. The research also may be used by media development professionals working in Iraq.

This research is conducted under a grant from IREX.

## Methodology

The IREX Audience Measurement Survey 2011 (W2) in Iraq was an ad hoc national quantitative research study on media usage, habits and attitudes of people over the age of 15, across Iraq, with a total sample size of 3,000 individuals. The total sample consists of a representative sample of 2,600 individuals, as well as a booster sample of 400 Iraqi youth using new media. The margin of error is +/- 1.79%.

The questionnaire consists of 96 substantive questions, 19 demographic questions, and 28 management and quality control questions.

The fieldwork was conducted from May 02-13, 2011. The average length of a successful interview was 83 minutes. Interviews ranged from 51 minutes to 131 minutes. 1,412 out of 4,412 contacts were refused by potential respondents; resulting in refusal rate of 32%.

Internationally recognized KA Research Limited based in Turkey conducted the fieldwork in Iraq as a strategic partner with D3 Systems.

- KA has been working in Iraq over the last 9 years and is known as one of the first research companies to operate in Iraq.
- KA has 28 offices across 18 Iraqi provinces – employing over 800 fulltime experienced Iraqi research and field staff.
- The company has conducted several hundreds of thousands qualitative interviews for D3 and other international and national companies in Iraqi since 2003.

## Overview

This study is broken into three sections:

1. A demographic and psychographic profile is provided of the Iraqi population.
2. A regional perspective is provided with respect to media behavior.
3. Media usage habits analyzed across five major mediums: Television, Radio, Print, the Internet and Mobile Phones.

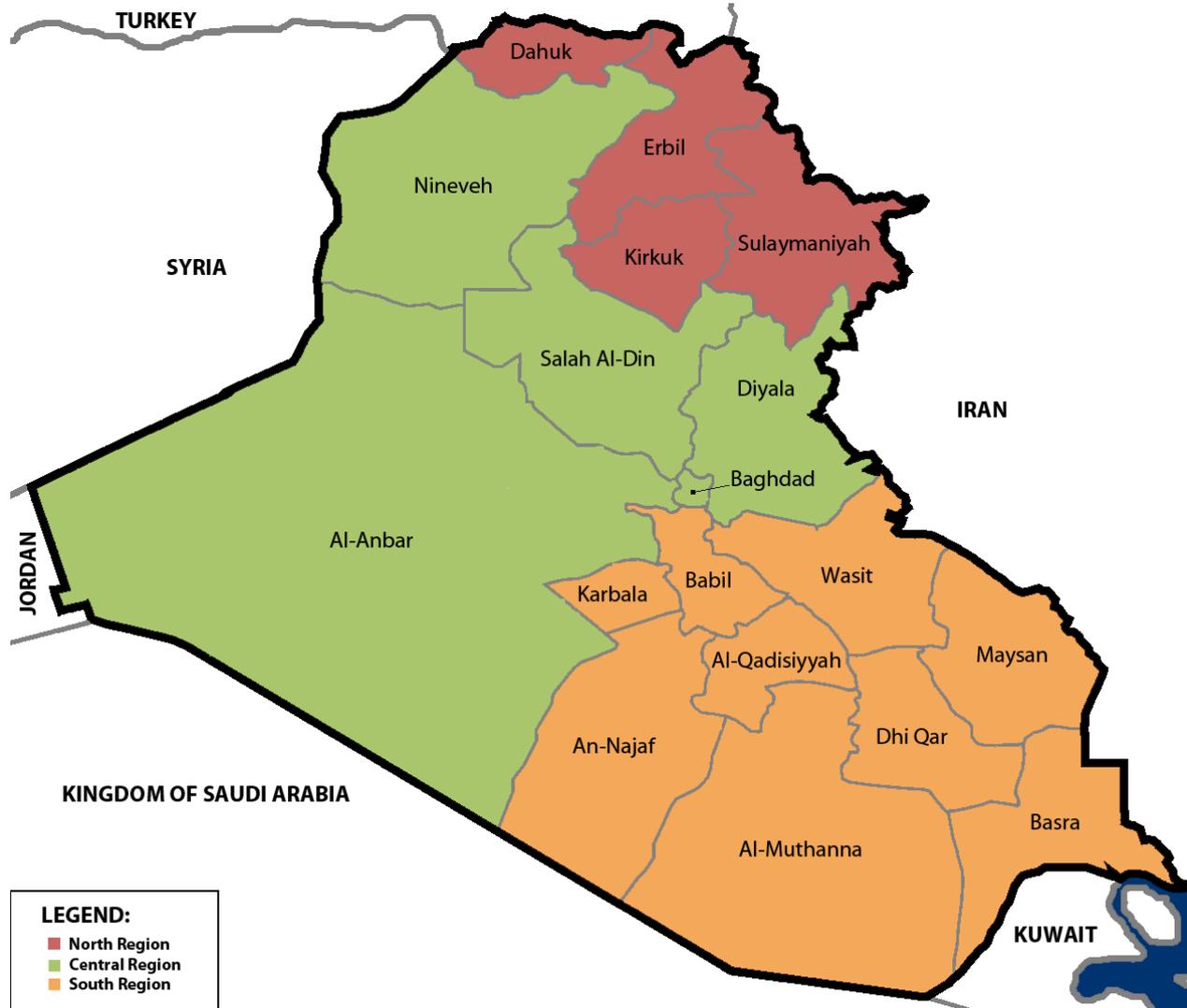
The analysis in this report has been weighted to represent the total population of Iraq.

The 18 province survey and data analysis is based on regional segmentation between Northern Iraq, Central Iraq, and Southern Iraq.

| Regional Population  |   |  |
|--|---|--|
| North  | Central   | South  |
| Dahuk (2%)<br>Erbil (5%)<br>Sulaymaniyah (6%)<br>Kirkuk (3%) | Al-Anbar (5%)<br>Baghdad (24%)<br>Diyala (5%)<br>Salah Al-Din (4%)<br>Nineveh (10%) | Karbala (3%)<br>Babil (6%)<br>Wasit (4%)<br>Al-Qadisiyyah (3%)<br>An-Najaf (4%)<br>Al-Muthanna (2%)<br>Basra (7%)<br>Maysan (3%)<br>Dhi Qar (5%) |



## Eighteen Provinces Were Surveyed – Three Regions Are Analyzed



## Demographics (by Region)

|  | <b>National</b><br> | <b>North</b><br> | <b>Central</b><br> | <b>South</b><br> |
|--|--|--|---|---|
| Percent Surveyed<br>(Estimated Population) | 100%<br>30.4 Million   | 16%<br>4.9 Million   | 48%<br>14.5 Million   | 36%<br>10.9 Million   |
| Ethnicity                                  | 79% Arab<br>16% Kurdish<br>3% Turkoman<br>1% Assyrian  | 86% Kurdish<br>8% Arab<br>5% Turkoman<br>1% Assyrian   | 89% Arab<br>4% Kurdish<br>4% Turkoman<br>2% Assyrian  | 100% Arab   |
| Religion                                   | 49% Shia Muslim<br>47% Sunni Muslim<br>2% Muslim<br>2% Christian                                     | 94% Sunni Muslim<br>2% Shia Muslim<br>2% Muslim<br>2% Christian                                    | 54% Sunni Muslim<br>40% Shia Muslim<br>2% Muslim<br>3% Christian                                      | 83% Shia Muslim<br>16% Sunni Muslim<br>1% Muslim  |
| Locality                                   | 67% Urban  | 73% Urban  | 70% Urban   | 60% Urban   |
| Gender                                     | 50% Male   | 49% Male   | 50% Male  | 51% Male  |
| Ages 15-24                                 | 36%  | 35%  | 30%   | 42%   |
| 25-39                                      | 30%  | 38%  | 35%   | 34%   |
| 40-49                                      | 16%  | 12%  | 15%   | 13%   |
| 50-55+                                     | 18%  | 16%  | 20%   | 11%   |
| Education *                                | 53%  | 49%  | 46%   | 64%   |
| Unemployment **                            | 45%  | 42%  | 45%   | 46%   |

\* Education includes "some secondary"

\*\* Unemployment does not include students

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## **General Media Consumption Habits**

TV is the leading source for news and information, however social communications are also seen as sources through face-to-face interactions, the Internet and mobile phones.

## Weekly Usage of Traditional Media Sources For News and Information

|                                 | <b>National</b><br> | <b>North</b><br> | <b>Central</b><br> | <b>South</b><br> |
|---------------------------------|--|--|---|---|
| Iraq TV                         | 90%  | 100%   | 98%   | 74%   |
| International TV (Arabic)       | 61%  | 74%  | 47%   | 74%   |
| International TV (non-Arabic)   | 15%  | 21%  | 6%  | 25%   |
| Iraq Radio                      | 37%  | 60%  | 30%   | 35%   |
| International Radio (non-Iraqi) | 28%  | 28%  | 23%   | 34%   |
| Iraqi Newspaper (Arabic)        | 20%  | 12%  | 20%   | 24%   |
| Intl Newspaper (non-Iraqi)      | 11%  | 2%   | 14%   | 9%  |
| Magazines                       | 14%  | 19%  | 3%  | 25%   |
| Friends and Family              | 49%  | 55%  | 37%   | 62%   |
| Mosques/Religious Leaders       | 22%  | 29%  | 11%   | 35%   |

**While Friends and Family are not “Media” – it is important to note that 49% of Iraqis refer to them as a source of news and information.**

## Weekly Usage of New Media Sources For News and Information

|  | <b>National</b><br> | <b>North</b><br> | <b>Central</b><br> | <b>South</b><br> |
|--|--|--|---|---|
| Internet (Social Networks)               | 28%  | 24%  | 27%   | 32%   |
| Internet (Official News Sites)           | 26%  | 24%  | 24%   | 30%   |
| Blogs                                    | 17%  | 24%  | 6%  | 28%   |
| Mobile Phone<br>(Friends and Family SMS) | 33%  | 34%  | 22%   | 50%   |
| Mobile Phone<br>(Official News SMS)      | 26%  | 19%  | 22%   | 36%   |

**Noteworthy is the prominence of SMS messages sent from social connections in the consumption of news and information.**

## Television Is Essential To Delivering News to Iraqis



Nationally, 90% of Iraqis are watching TV for their news; more than any other media source.



|   | Television | Radio | Mobile Phone | Internet | Newspapers |
|---|------------|-------|--------------|----------|------------|
| Percentage of people who used the medium for <b>news</b> in the last week           | 90%        | 37%   | 33%          | 28%      | 20%        |
| Percent that spent at least 45 minutes consuming <b>news</b> by media type          | 47%        | 46%   | --           | 21%      | 41%        |
| Percent that spent at least 45 minutes consuming <b>entertainment</b> by media type | 25%        | 46%   | --           | 14%      | 38%        |

**Mobile phones are a source for news and information for 33% of Iraqis.**

**Northern Iraq: 100% are watching TV for news on weekly basis –**  
 Radio as a source of news is highest in these provinces.



|  |  |  |  |  |  |
|--|---|--|---|---|---|
| Percentage of people who used the medium for <b>news</b> in the last week                | 100%  | 60%  | 34%   | 24%   | 12%   |
| Percent that spent up to 45 minutes per day consuming <b>news</b> by media type          | 14%   | 57%  | --  | 20%   | 47%   |
| Percent that spent up to 45 minutes per day consuming <b>entertainment</b> by media type | 38%   | 59%  | --  | 16%   | 35%   |

**86% are watching TV news more than 45 minutes a day**

## Central Iraq: 98% are watching TV for news



|  |  |  |  |  |  |
|--|---|--|---|---|---|
| Percentage of people who used the medium for <b>news</b> in the last week                | 98%   | 30%  | 22%   | 27%   | 20%   |
| Percent that spent up to 45 minutes per day consuming <b>news</b> by media type          | 52%   | 41%  | --  | 18%   | 36%   |
| Percent that spent up to 45 minutes per day consuming <b>entertainment</b> by media type | 18%   | 49%  | --  | 12%   | 42%   |

**While news is important to Iraqis in the Central provinces, 81% spend more than 45 minutes a day watching TV for entertainment.**

## Southern Iraq: 74% are watching news on TV



|   |  |  |  |  |  |
|---|---|--|---|---|---|
| Percentage of people who used the medium for <b>news</b> in the last week                   | 74%   | 35%  | 50%   | 32%   | 24%   |
| Percent that spent at up to 45 minutes per day consuming <b>news</b> by media type          | 53%   | 48%  | --  | 26%   | 45%   |
| Percent that spent at up to 45 minutes per day consuming <b>entertainment</b> by media type | 30%   | 40%  | --  | 15%   | 34%   |

**50% report using their mobile phones as a source of news**



## **News and Information in Iraq**

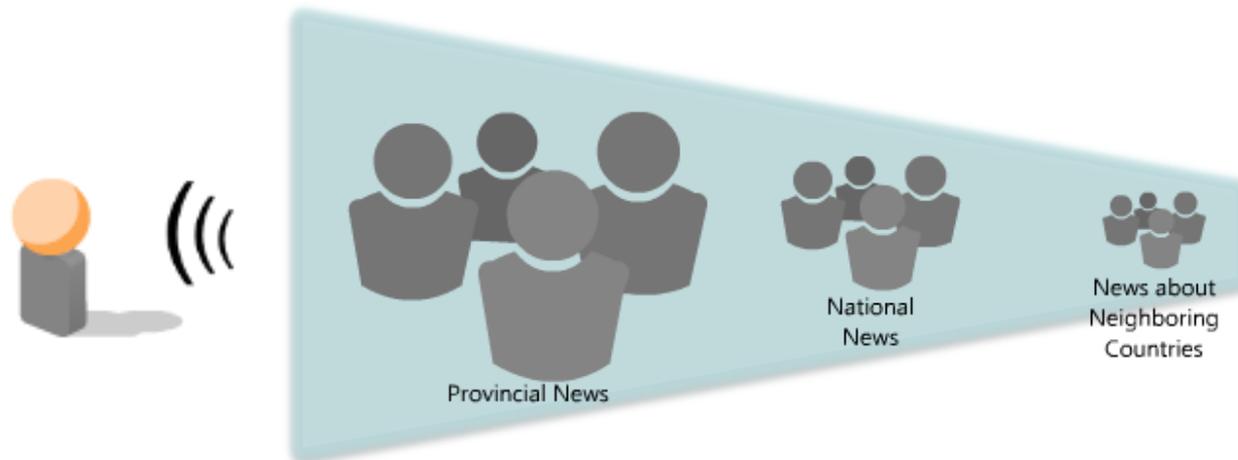
As the challenge of rebuilding Iraq continues, Iraqis are generally interested in news and information that impacts them directly (or locally) and are somewhat less concerned with the news the further it is from their local province.

Iraqis are using social connections through personal relationships, the Internet and SMS Messaging on their Mobile Phones to share information learned from traditional sources such as TV and Radio.





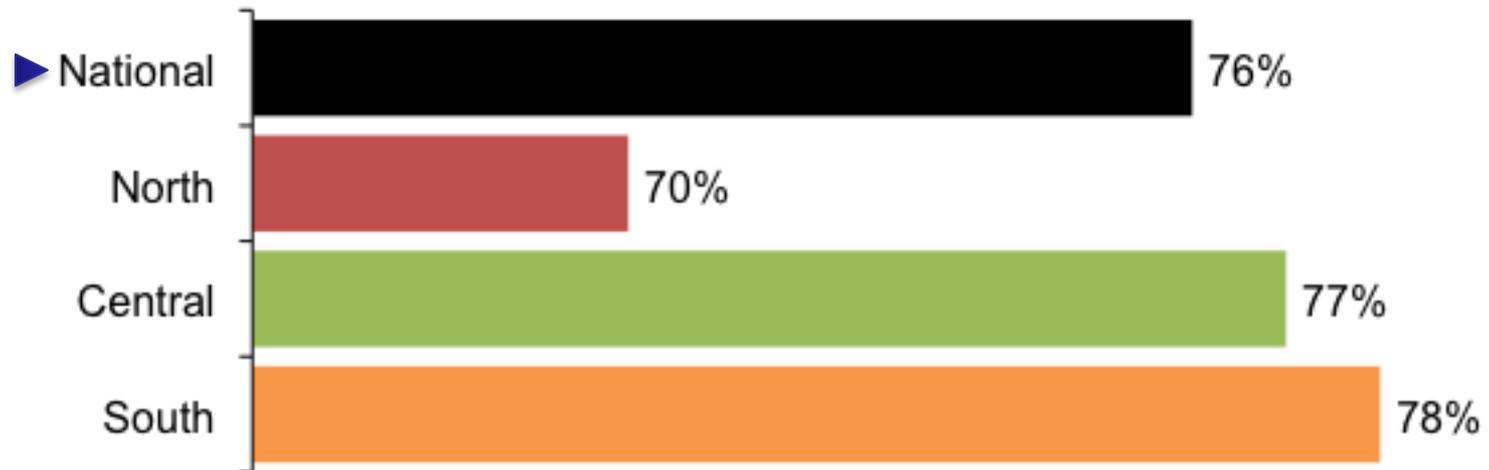
**Iraqis are primarily interested in local news and are increasingly less interested in information the further removed it is from directly impacting them.**



**Nationally, 76% feel it is important to stay informed about news and current events.**



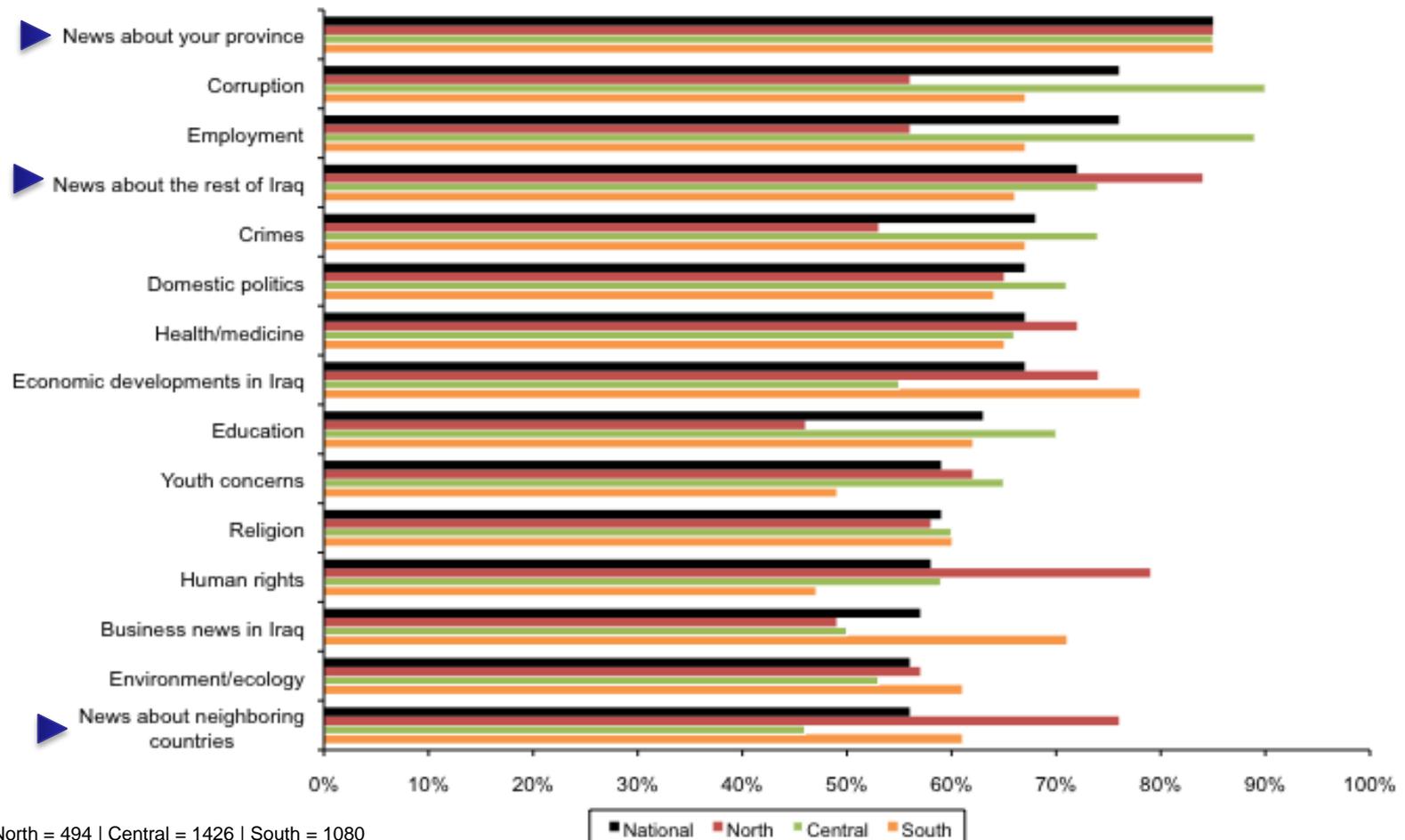
Importance of staying informed about news and current events



**85% find provincial news to be more relevant than news from outside of Iraq, regardless of region.**



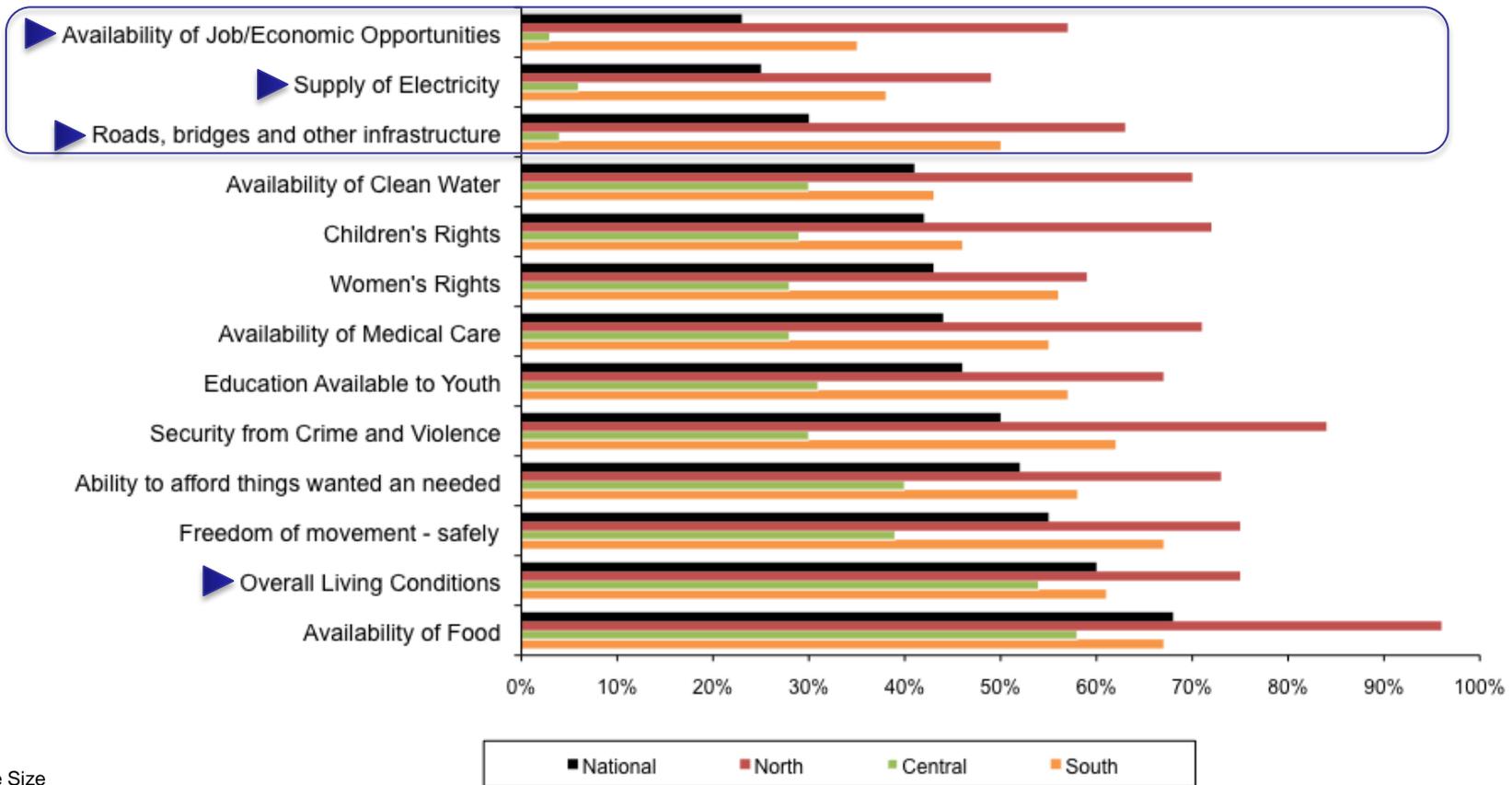
**Top News and Current Events  
 Content Interest Level**





**Overall living conditions are considered “good” by 60% of Iraqis –**  
 Primary issues in Iraq are related to Employment, Electricity and the country’s Infrastructure conditions in the Central provinces.

**Conditions In Iraq**  
 Percent Who Perceive to be Good





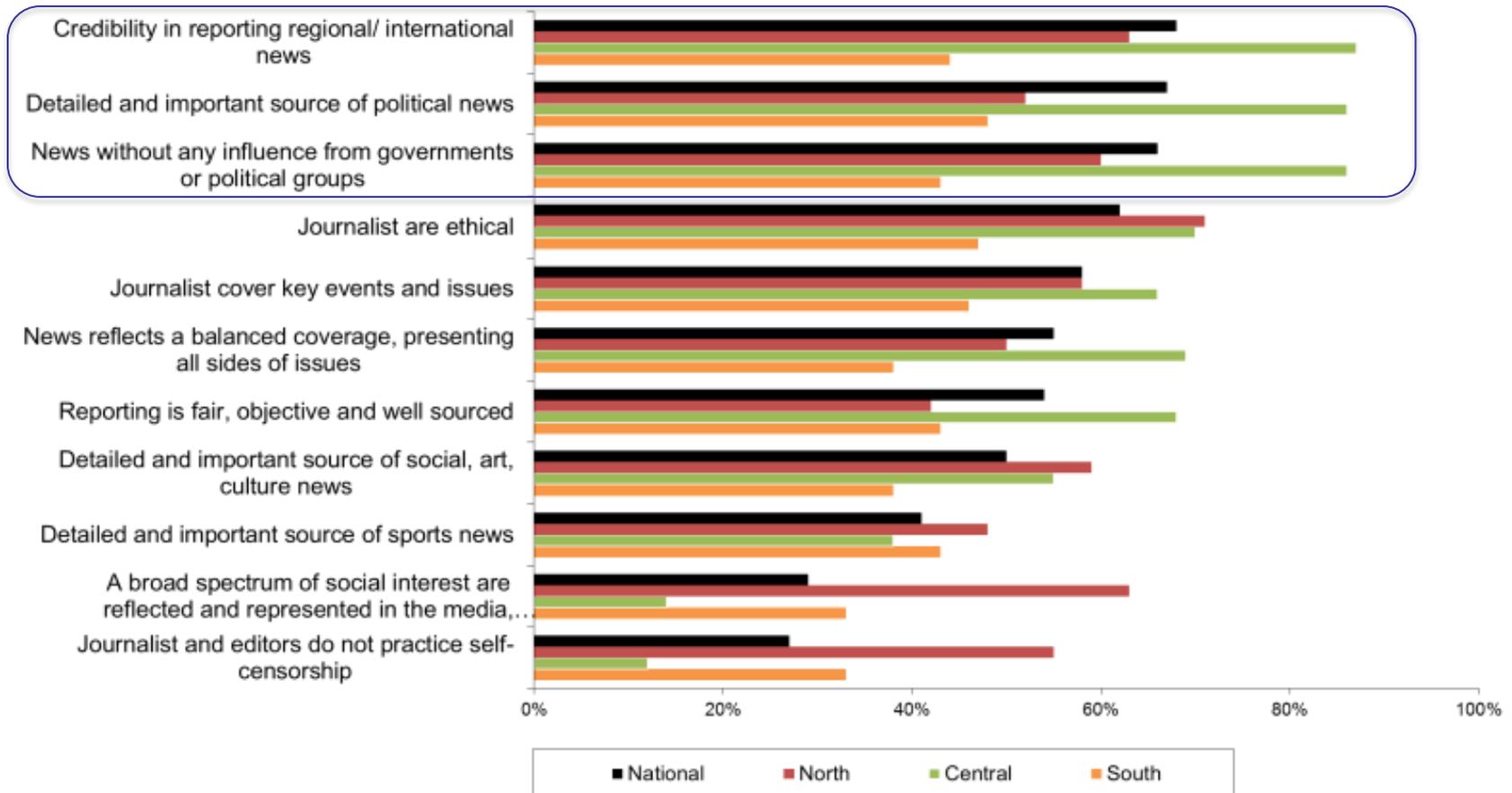
## **State of Journalism in Iraq**

More than half of Iraqis feel that censorship in their country is a problem for both local and foreign journalists.

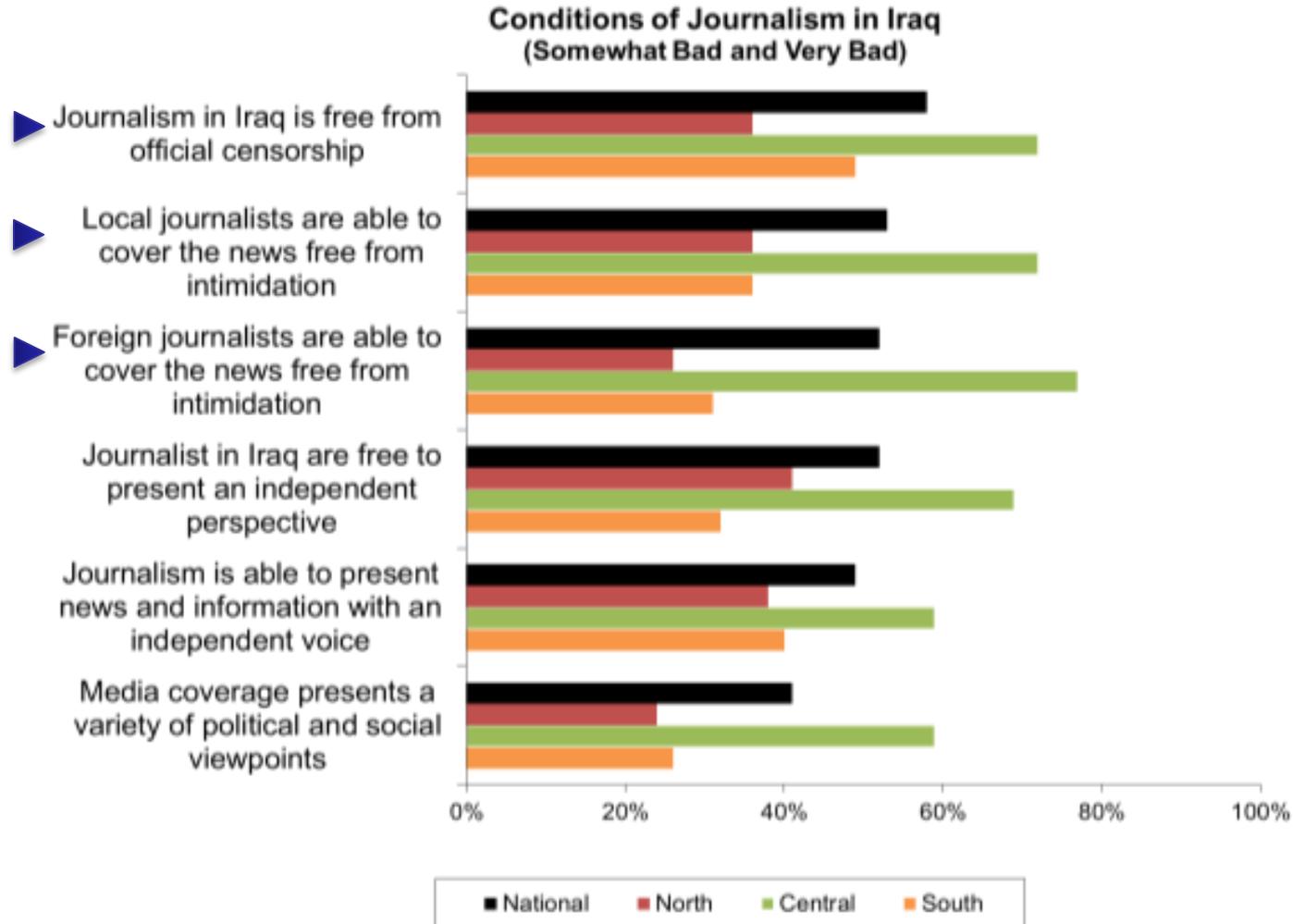
**It is important that news be a credible source of political news without influence from governments or political groups.**



**Importance of Journalistic Qualities in Iraq**  
 (Based on a 4 or 5 in a Five Point Scale)



**Journalistic freedom is important in Iraq** – Iraqis in the central provinces perceive conditions to be worse than those from other parts of Iraq.





## **TV Viewership and Broadcaster Trust**

Changes in viewing behavior has not changed significantly since the 2009 survey, preferences in sources for news and information are consistent.



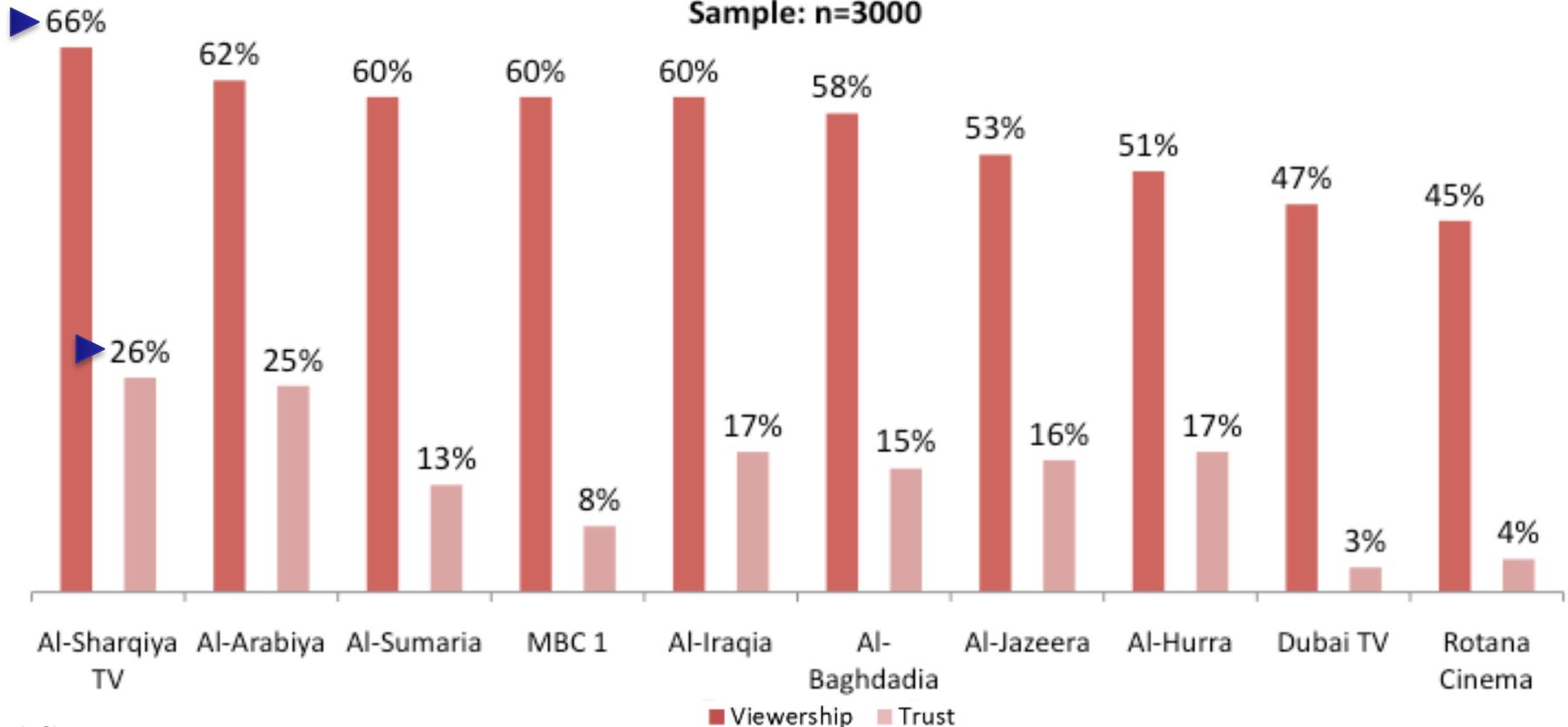
## There is a significant disparity in trust and viewership



### Iraq Weekly TV Viewership and Level of Trust

Yesterday and Within Last 7 Days

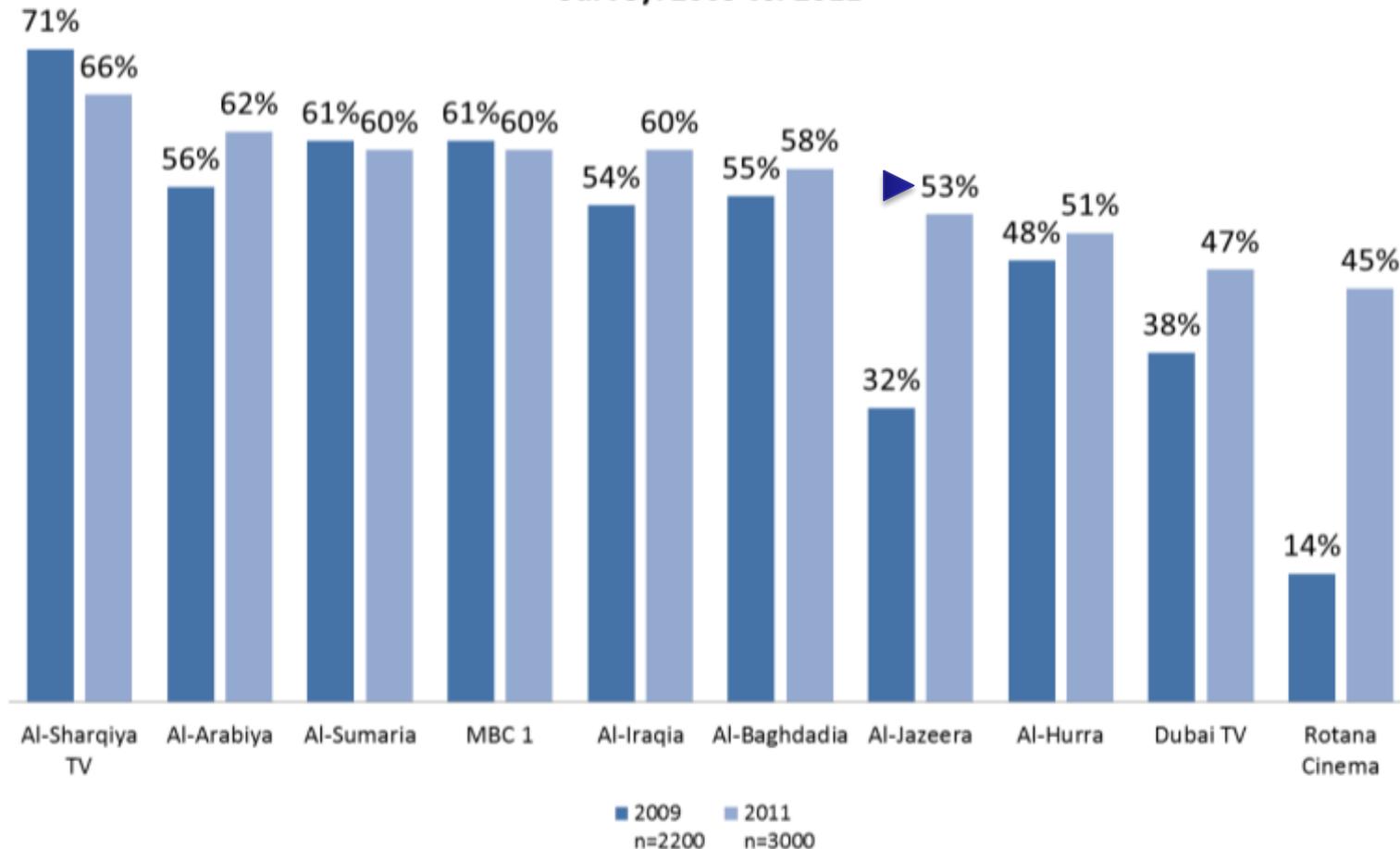
Sample: n=3000



**Overall TV viewership is similar to what it was in 2009 – Al-Jazeera viewership increased 66% since 2009**



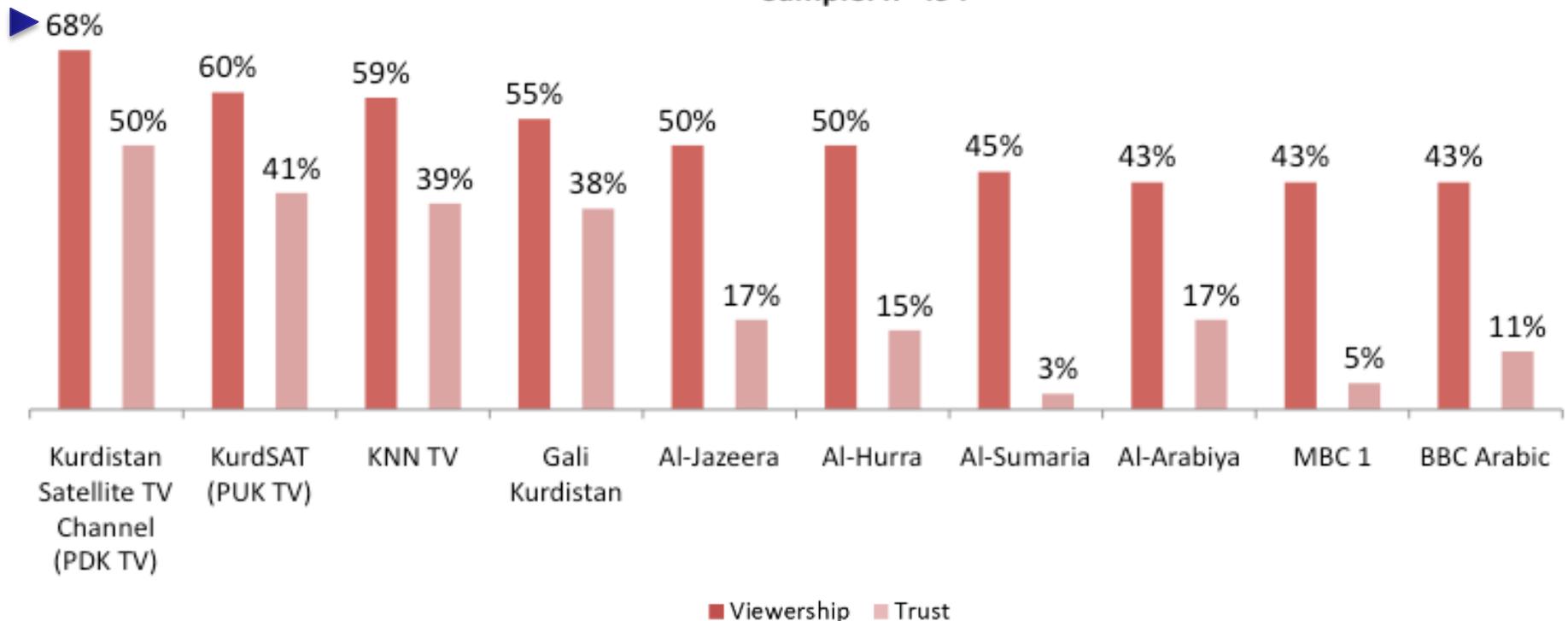
**Iraq Weekly TV Viewership**  
 Survey: 2009 vs. 2011



## Northern Iraq: Kurdistan Satellite TV (68%) is the most watched TV station for news and information



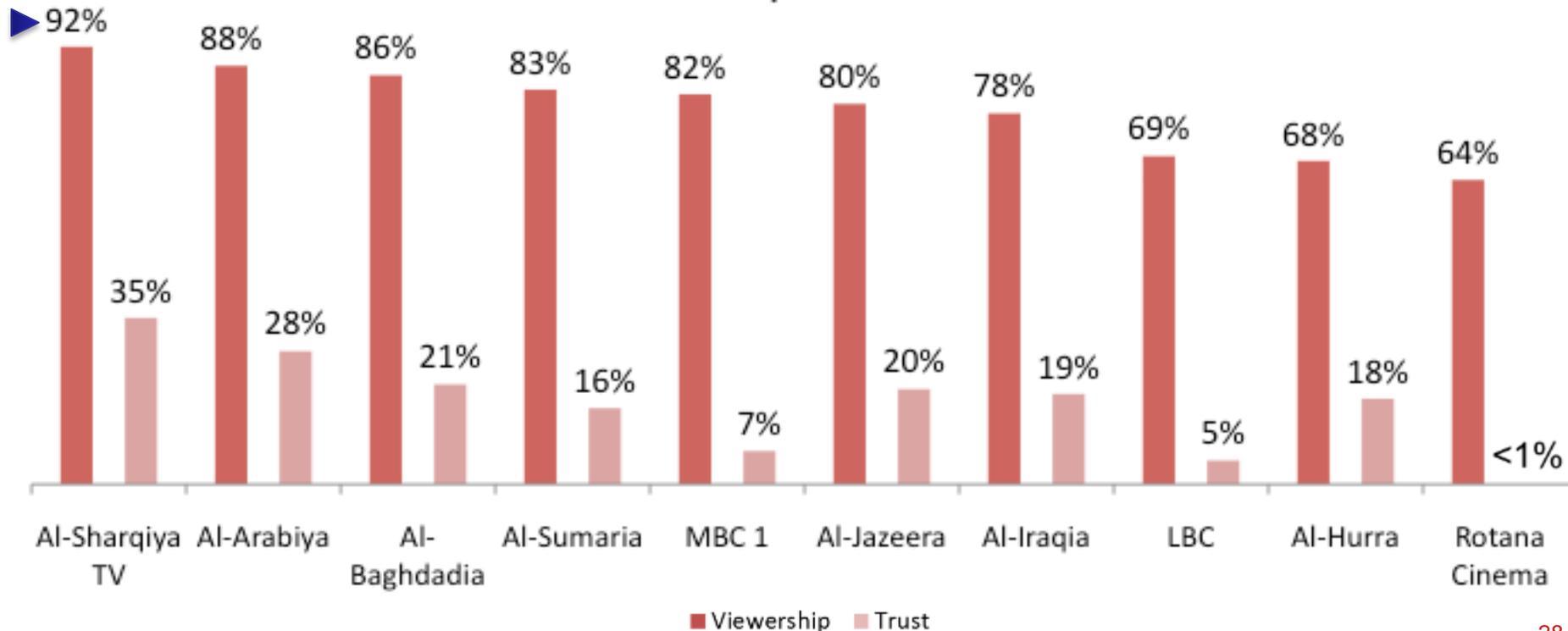
**Northern Iraq Weekly TV Viewership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=494



## Central Iraq: Al-Sharqiya is the most watched station for news and information



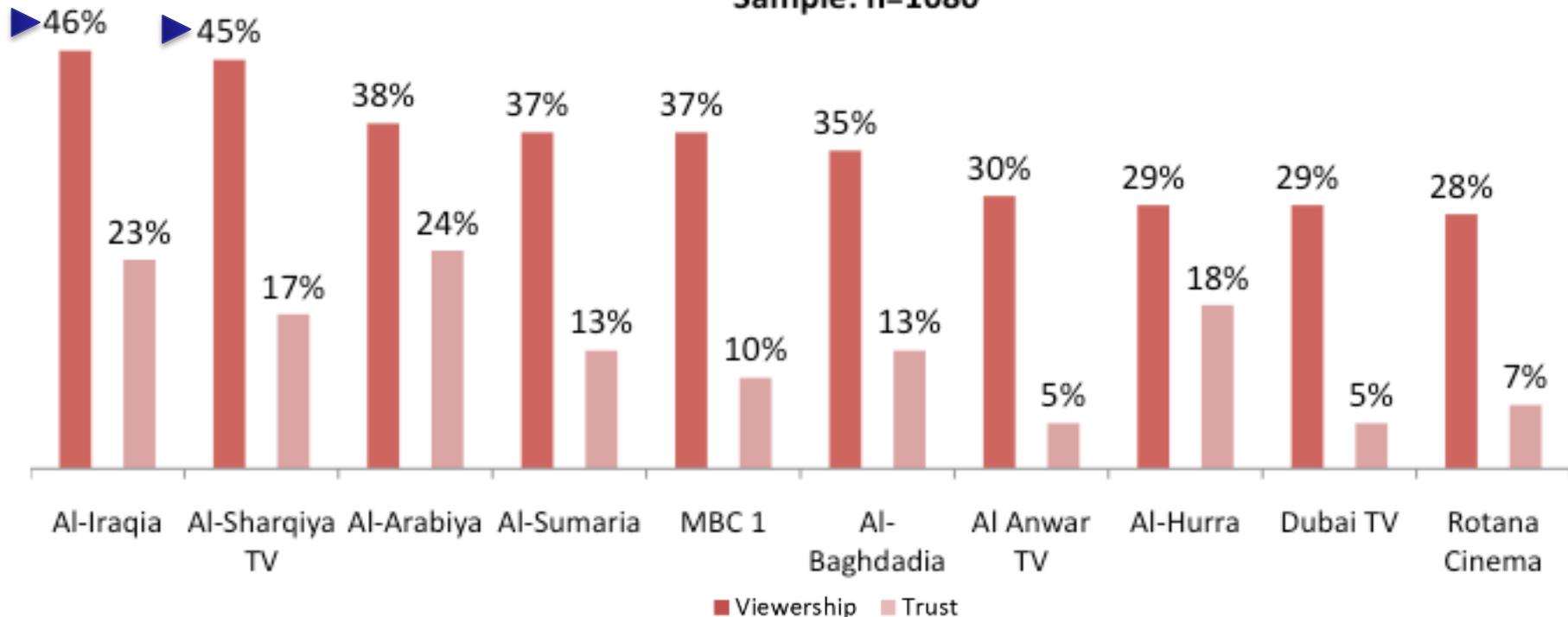
**Central Iraq Weekly TV Viewership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=1426



## Southern Iraq: Al-Iraqia and Al-Sharqiya are the two most watched TV channels for news and information



**Southern Iraq Weekly TV Viewership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=1080



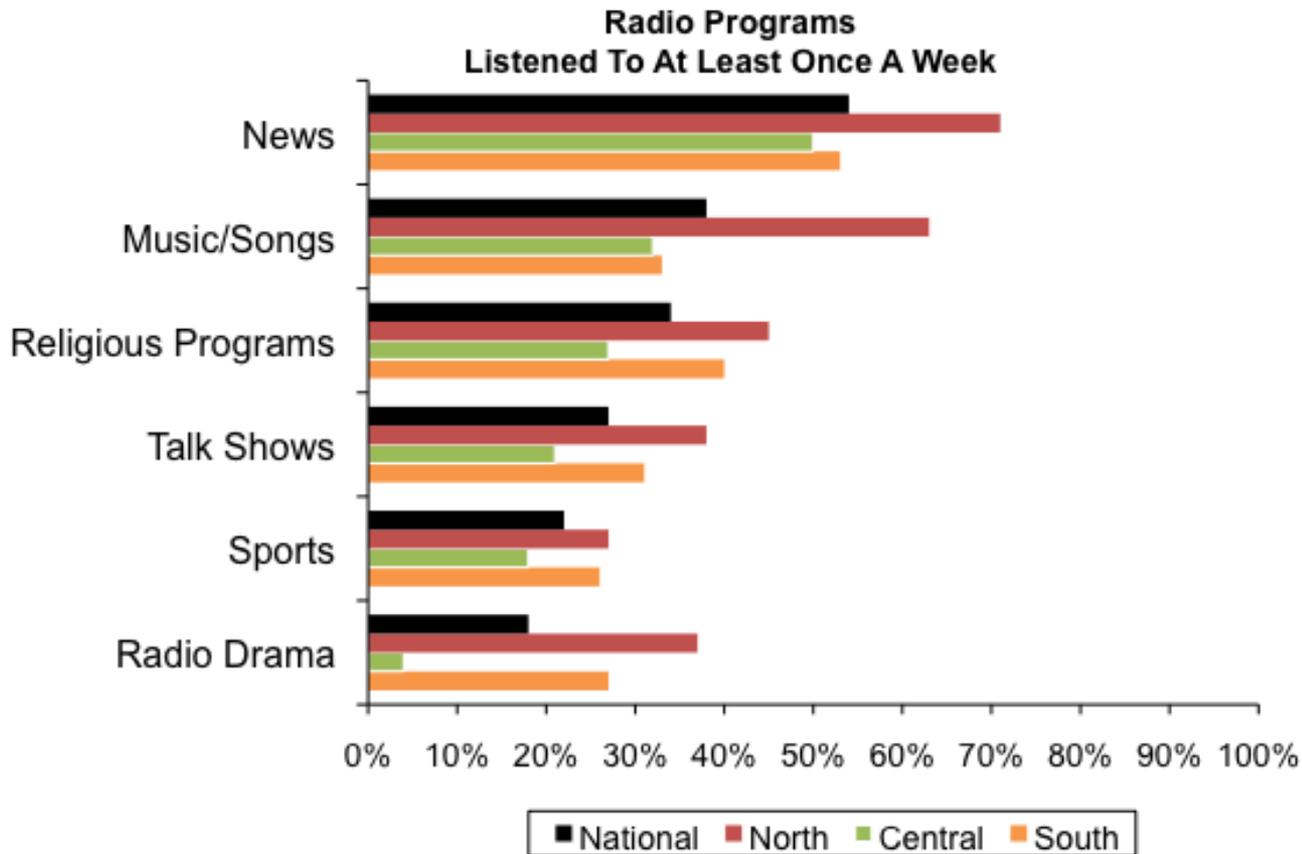


## **Radio Listenership and Broadcaster Trust**

Radio listenership is relatively low compared to TV, however its importance in delivering news is clear – as with TV, low levels of trust are evident.



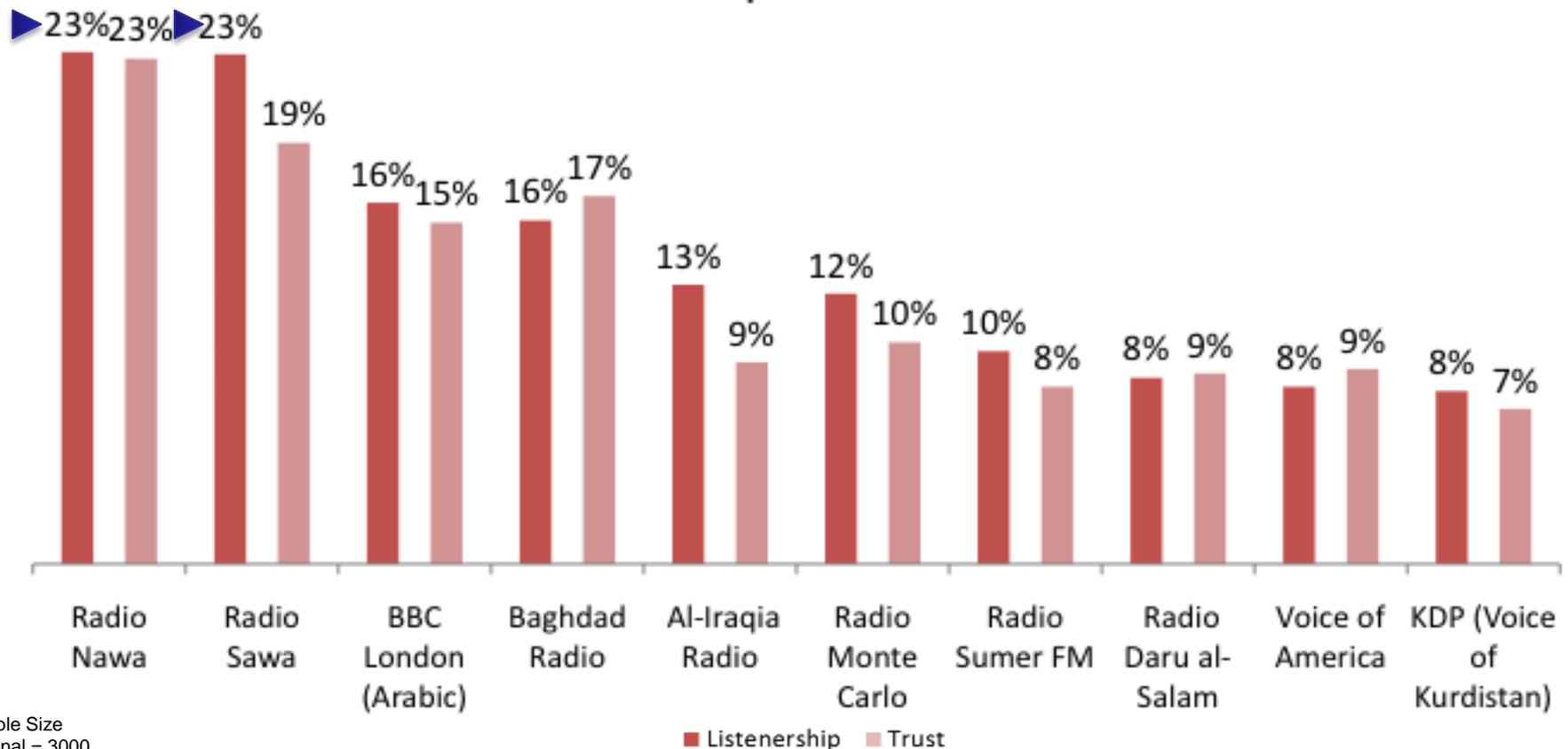
**Northern Iraqis listen to the Radio for a variety of reasons** – noteworthy is the relatively lower level of importance placed on staying informed yet higher listenership of news (which was also seen in TV viewership).



## Nationally, Radio Nawa and Radio Sawa are the two most listened to radio stations in Iraq



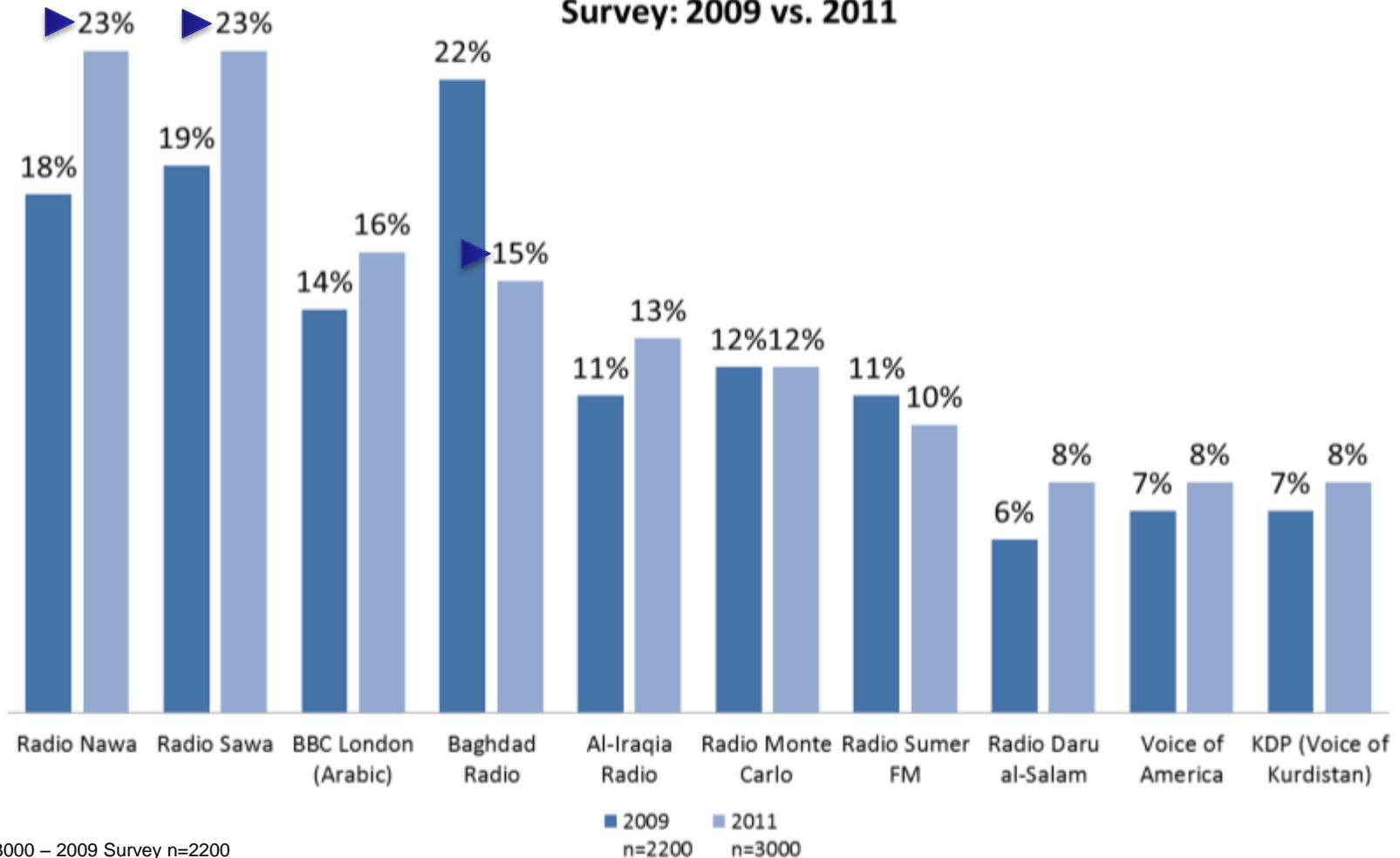
**Iraq Weekly Radio Listenership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=3000



## Listenership to Radio Nawa and Radio Sawa increased while Baghdad Radio audience declined.



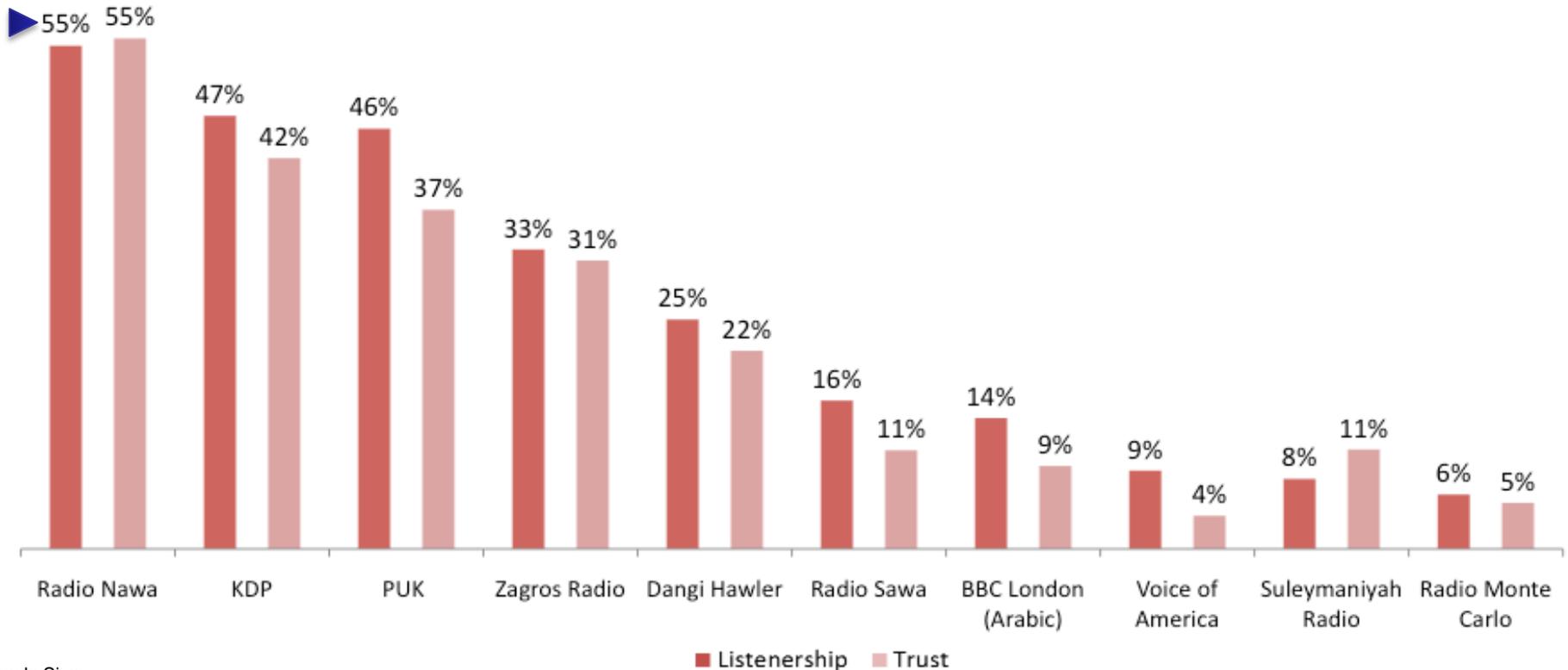
**Iraq Weekly Radio Listenership Survey: 2009 vs. 2011**



## Northern Iraq: Radio Nawa is the most listened to radio station – followed closely by KDP and PUK



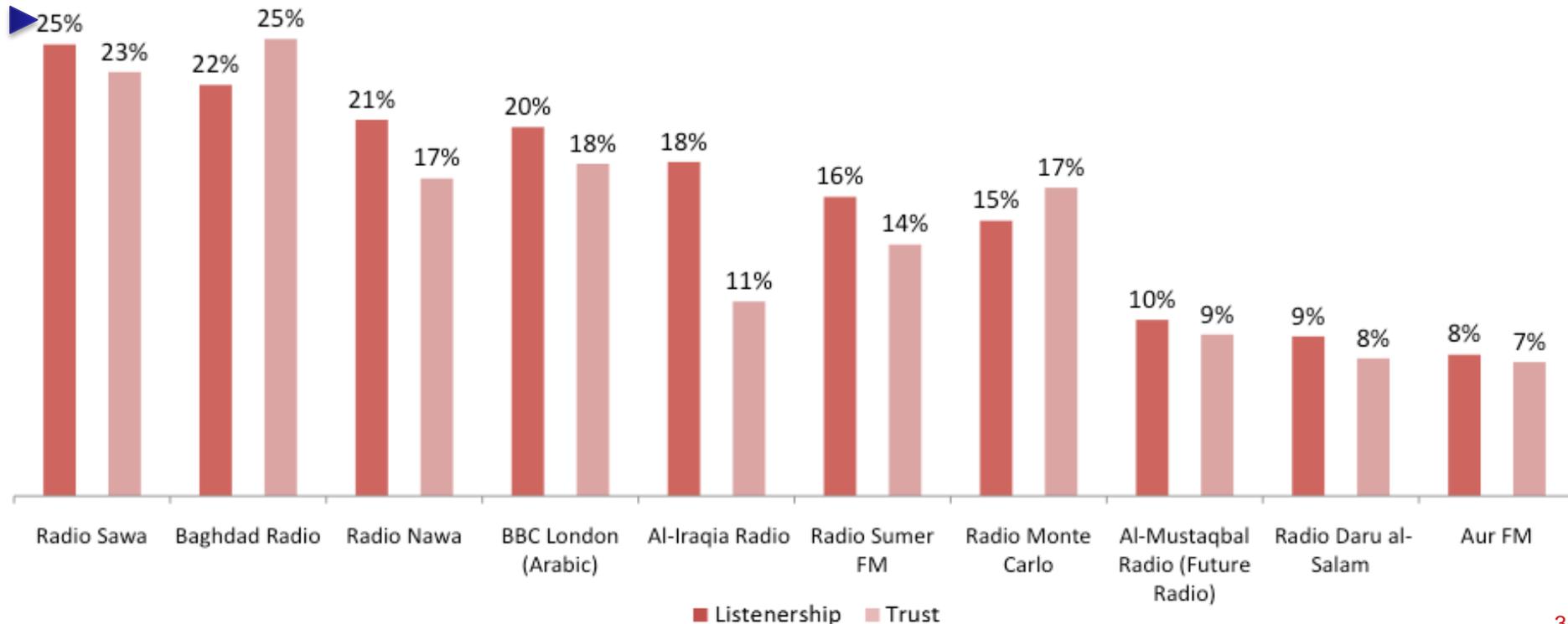
**Northern Iraq Weekly Radio Listenership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=494



## Central Iraq: Reflecting the generally low preference for Radio in these provinces – 25% report listening to Radio Sawa and 22% listen to Baghdad Radio



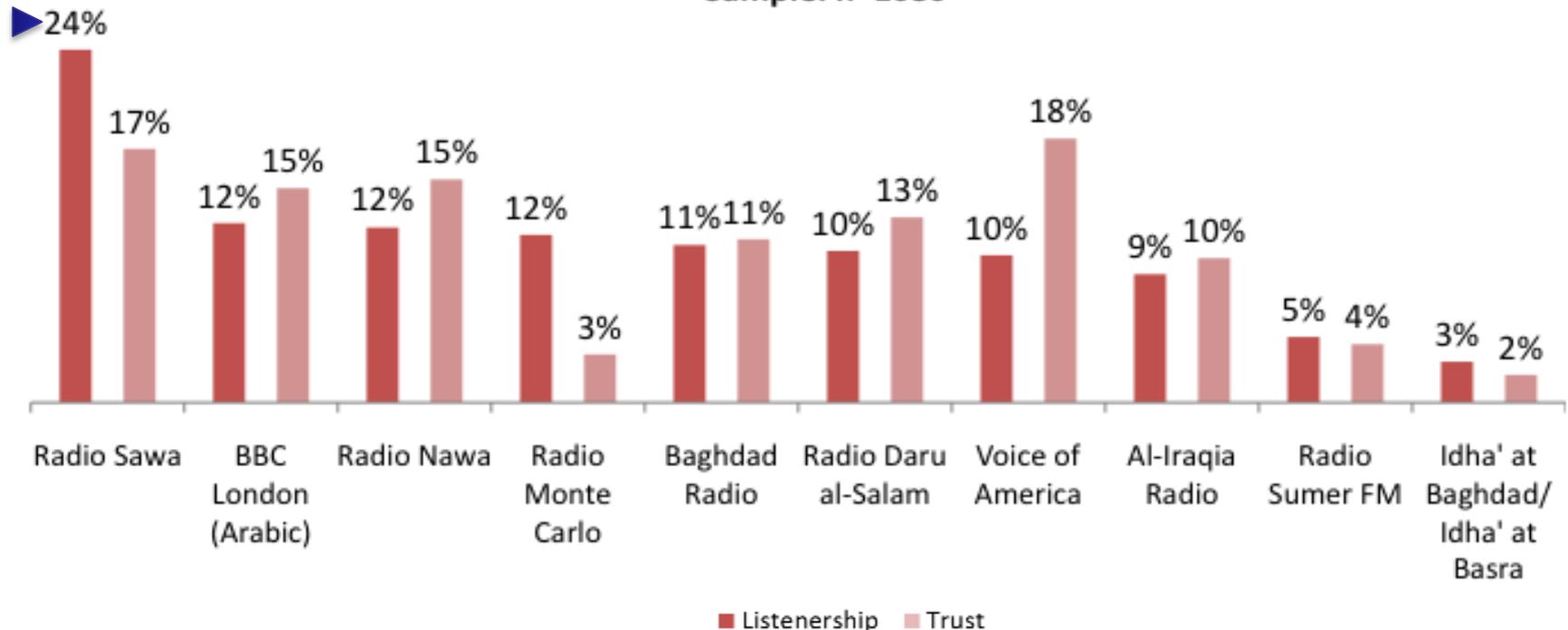
**Central Iraq Weekly Radio Listenership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=1426



**Southern Iraq: Radio Sawa (24%) has twice the listenership than any other broadcaster in the region**



**Southern Iraq Weekly Radio Listenership and Level of Trust**  
 Yesterday and Within Last 7 Days  
 Sample: n=1080





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## **Print Media in Iraq**

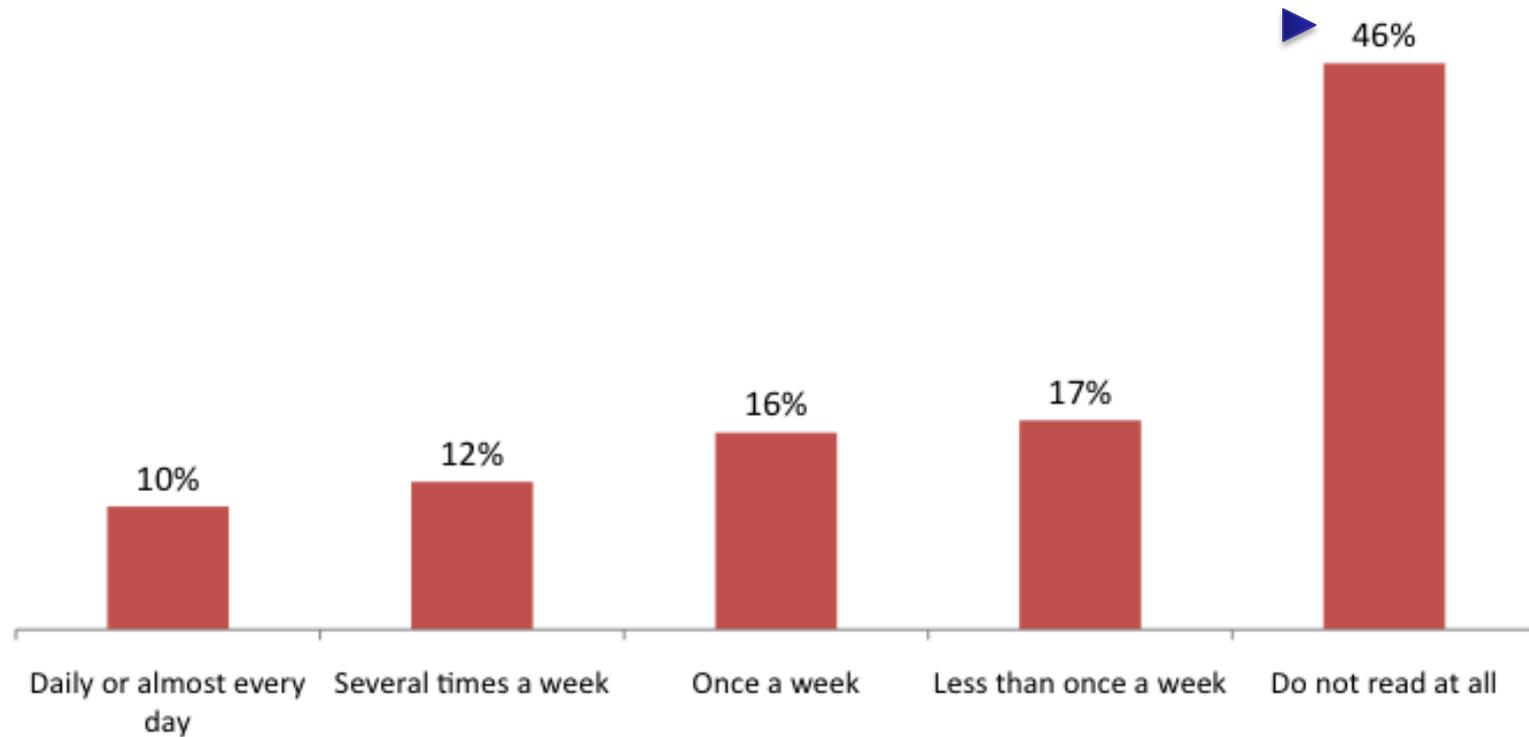
Newspaper readership is lowest used of the mediums surveyed.



## Nearly half of Iraqis do not read newspapers



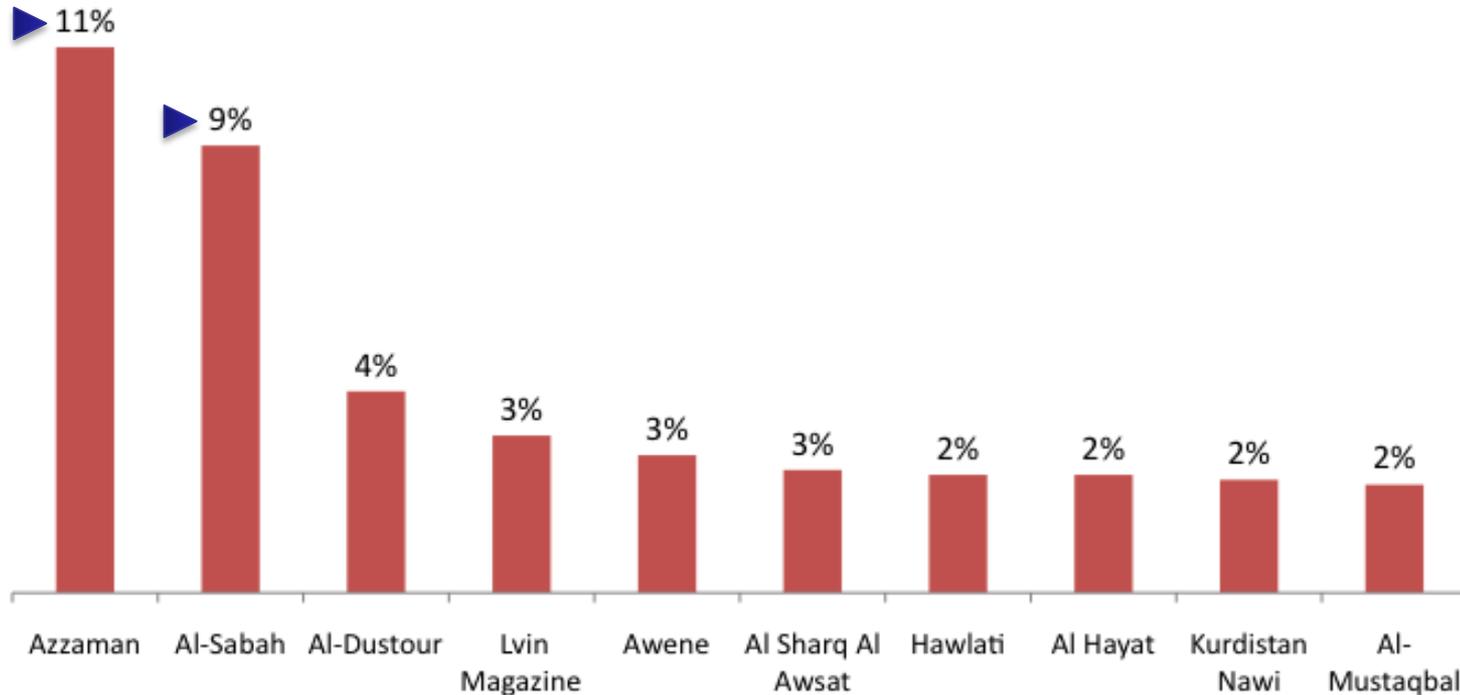
**Frequency of Newspaper Readership**  
n=3,000



The two most read Newspapers are Azzaman and Al Sabah which are read by fewer than 15% of Iraqis



**Iraqi Weekly Newspaper Readership**  
 Yesterday and Within Last 7 Days  
 Sample: n=3000



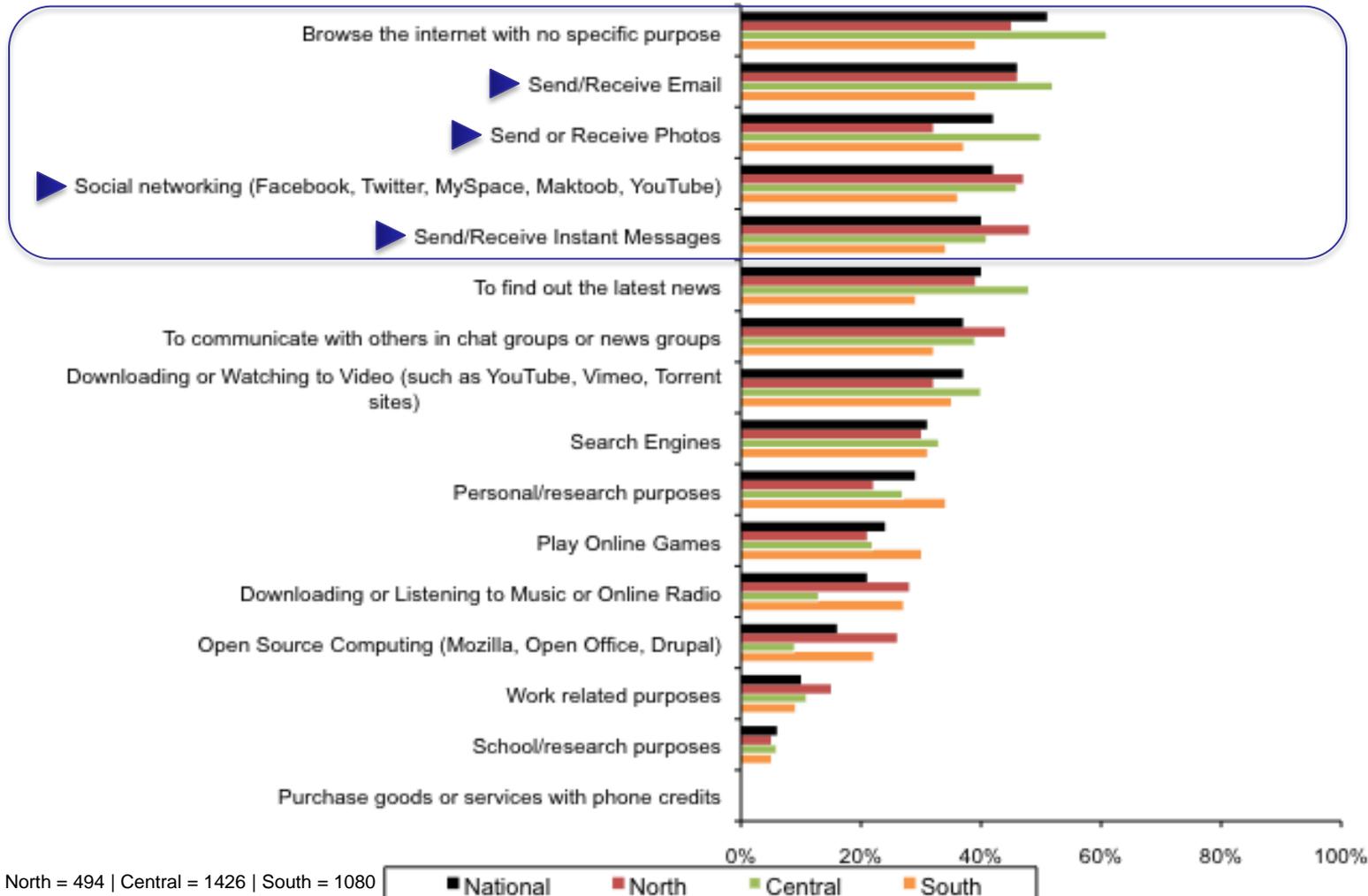
## **Internet Usage in Iraq**

The Internet is a rich source of news and information, not only from official broadcasters but also socially among friends and family.

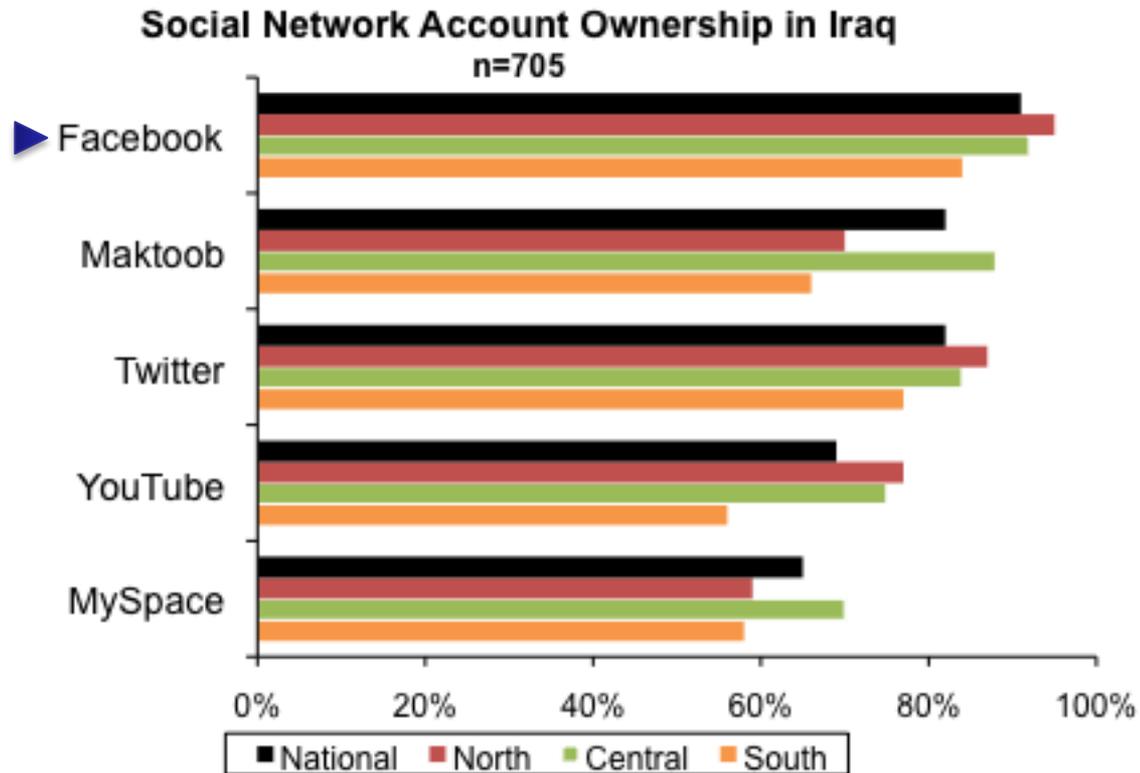
## Four of the top five computer activities are “social” in nature



**Computer Activities - At Least Once A Week**  
 Sample n=3000



## Facebook is the leading social network service in Iraq – followed closely by Maktoob and Twitter



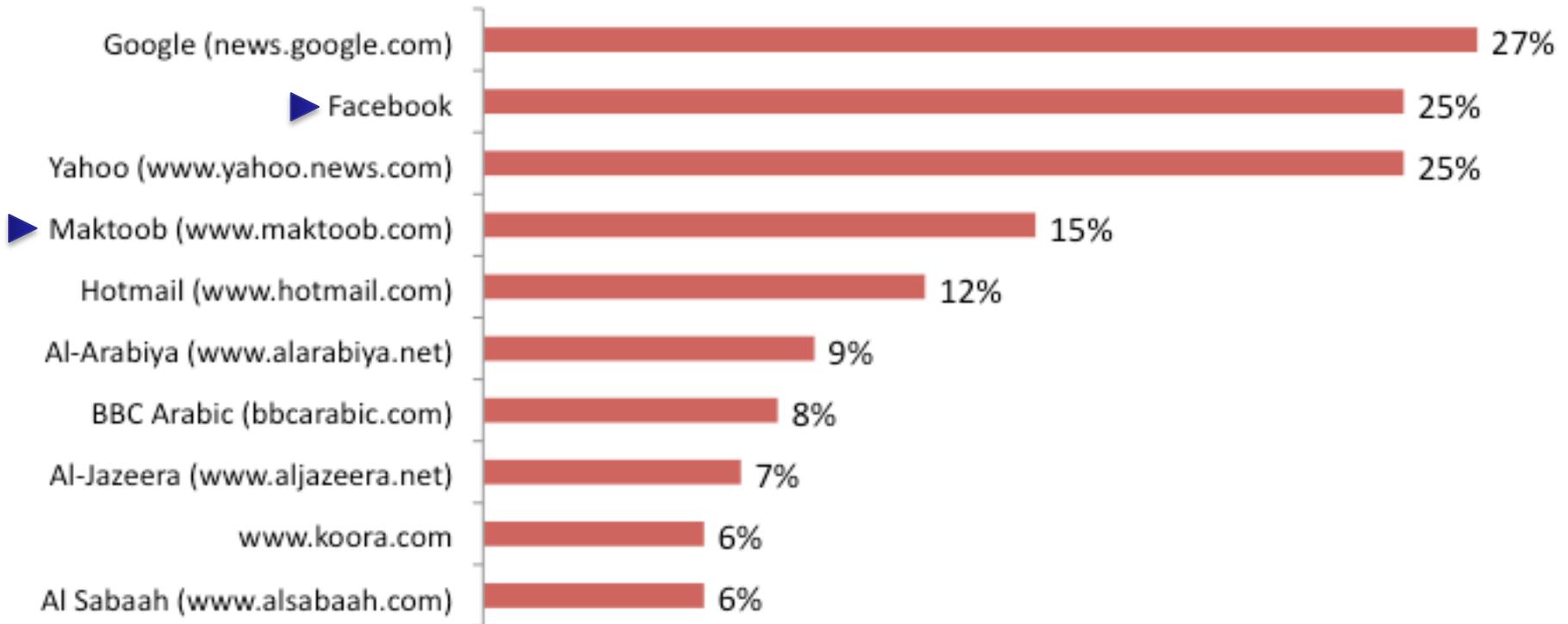
When asked how many people they are connected to – 82% indicated they have fewer than 50 people in their online social network.

**While Google and Yahoo are generally popular traditional web destinations – Facebook and Maktoob (social networking sites) are ranked prominently as a source of news and information in Iraq**



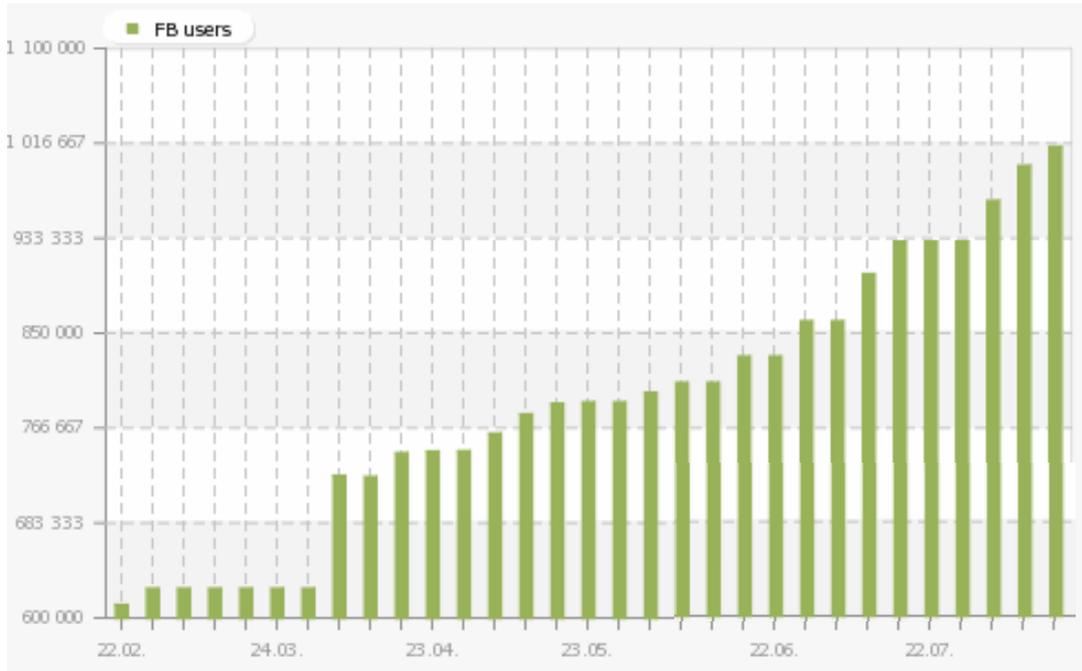
**Top 10 Websites for News and Information**

n=3,000

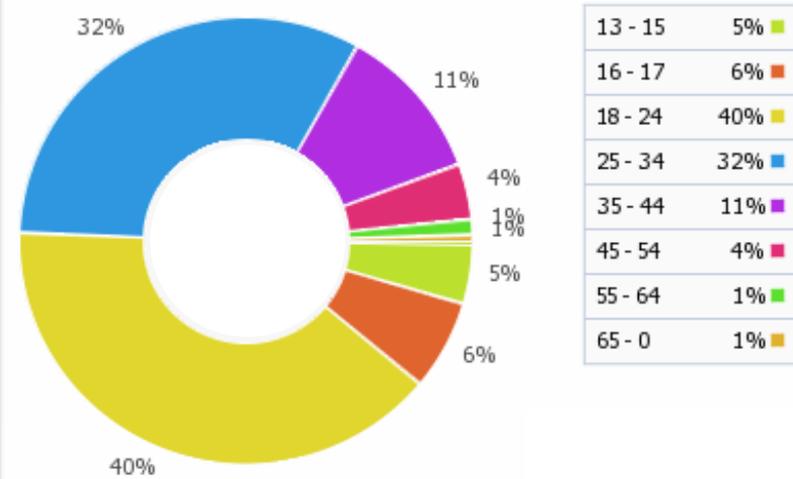




**There are over a million Facebook users in Iraq** – Iraqis creating accounts has experienced significant growth over the last six months.



**72% of Iraqi Facebook users are between 18 and 34 years old.**



Source: August 2011



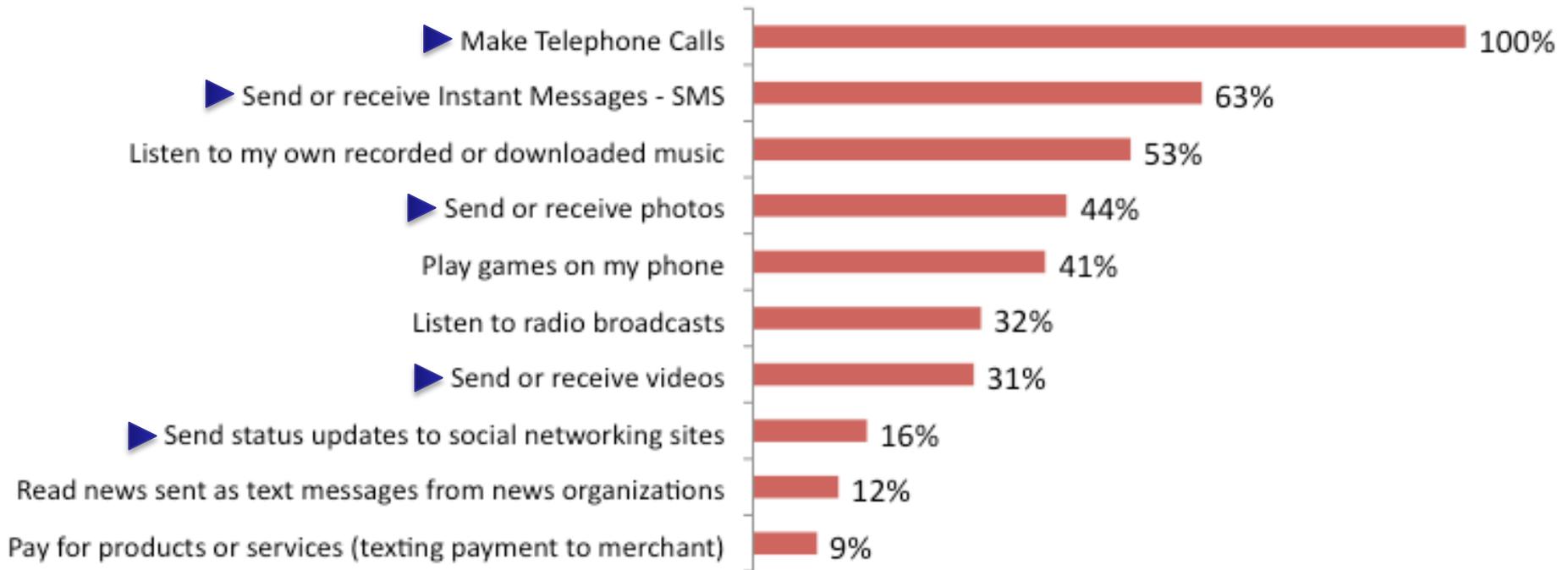
## **Mobile Media in Iraq**

Mobile technology in Iraq is sophisticated and ownership is high – sending and receiving information using mobile phones is growing as the younger generations continue to rely on their phones for more than just phone calls.

**Five of the top ten uses for mobile phones are social in nature – next to making telephone calls, 63% are communicating with SMS**



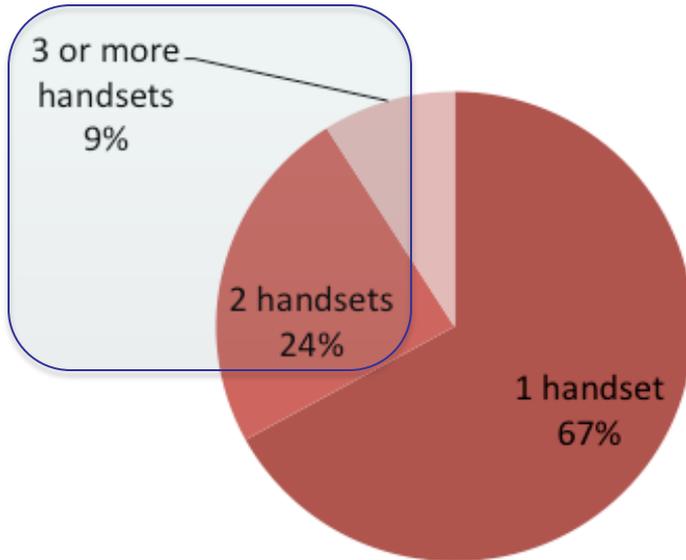
**Mobile Phone Uses**  
 n=2901



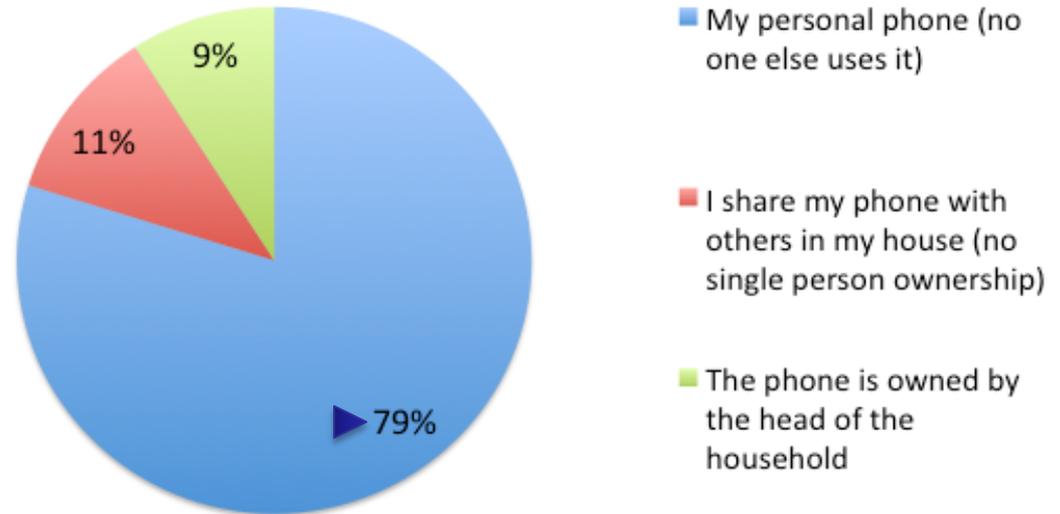
**More than a third of Iraqis own more than one mobile phone – their phone is typically considered their own personal phone versus sharing it with others**



**Handset Ownership in Iraq**  
 n=2,901



**Mobile Phone Ownership in Iraq**  
 n=2,901

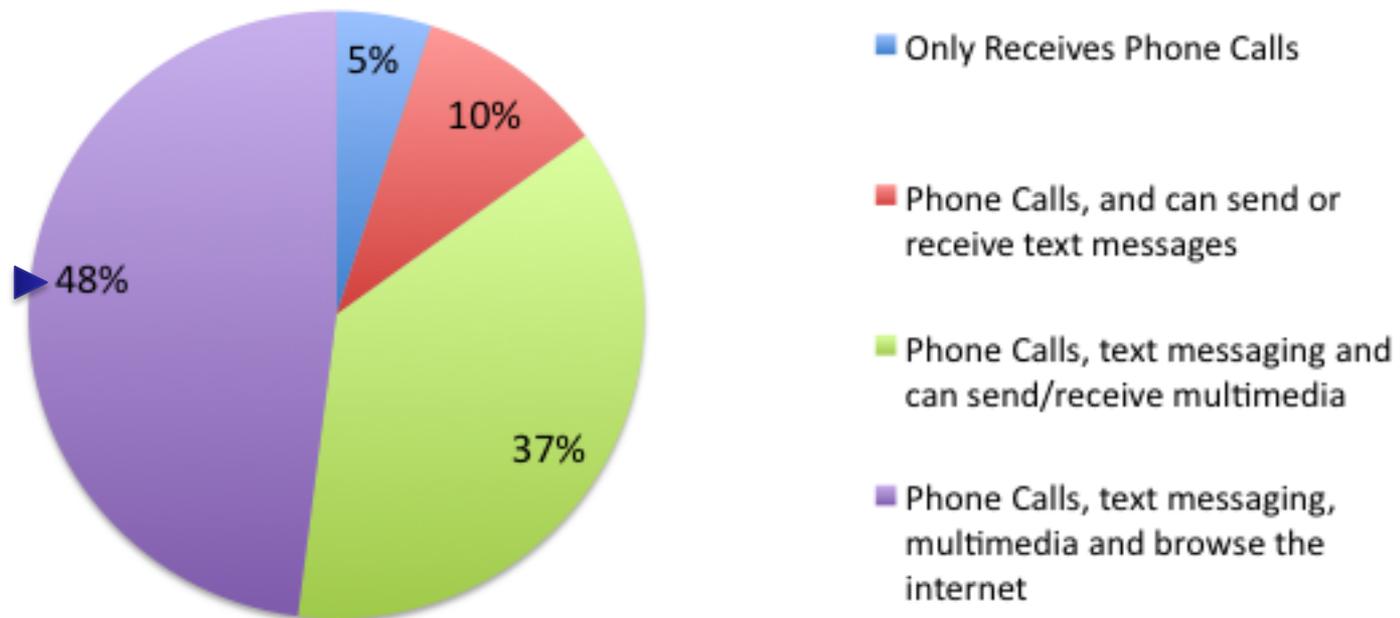


- My personal phone (no one else uses it)
- I share my phone with others in my house (no single person ownership)
- The phone is owned by the head of the household

## Nearly half of mobile phone users in Iraq have the capability of browsing the Internet



**Mobile Phone Capability in Iraq**  
n=2,901



## **New Media Youth in Iraq**

Iraqis between 15 and 24 years old make up more than a third of the population – this younger generation utilize the internet for news and information and social interactions are an important part of staying informed.



## **New Media Youth in Iraq**

In this survey we describe New Media Youth as 15-24 year old Iraqis using at least one of the following on a weekly basis:

- Internet Blogs
- News Organizations on the Internet (National/International – Al Jazeera, BBC, etc.)
- Social Networks on the Internet (Facebook, Maktoob, Twitter, etc.)
- Mobile Phone/PDA SMS from an official news organization
- Mobile Phone/PDA SMS from an information source (Friends and Family)

783 out of 3000 respondents fit the profile of a New Media Youth

**New Media Youth use traditional forms of news media similarly to the National population – but are almost twice as likely to use social media and the Internet.**

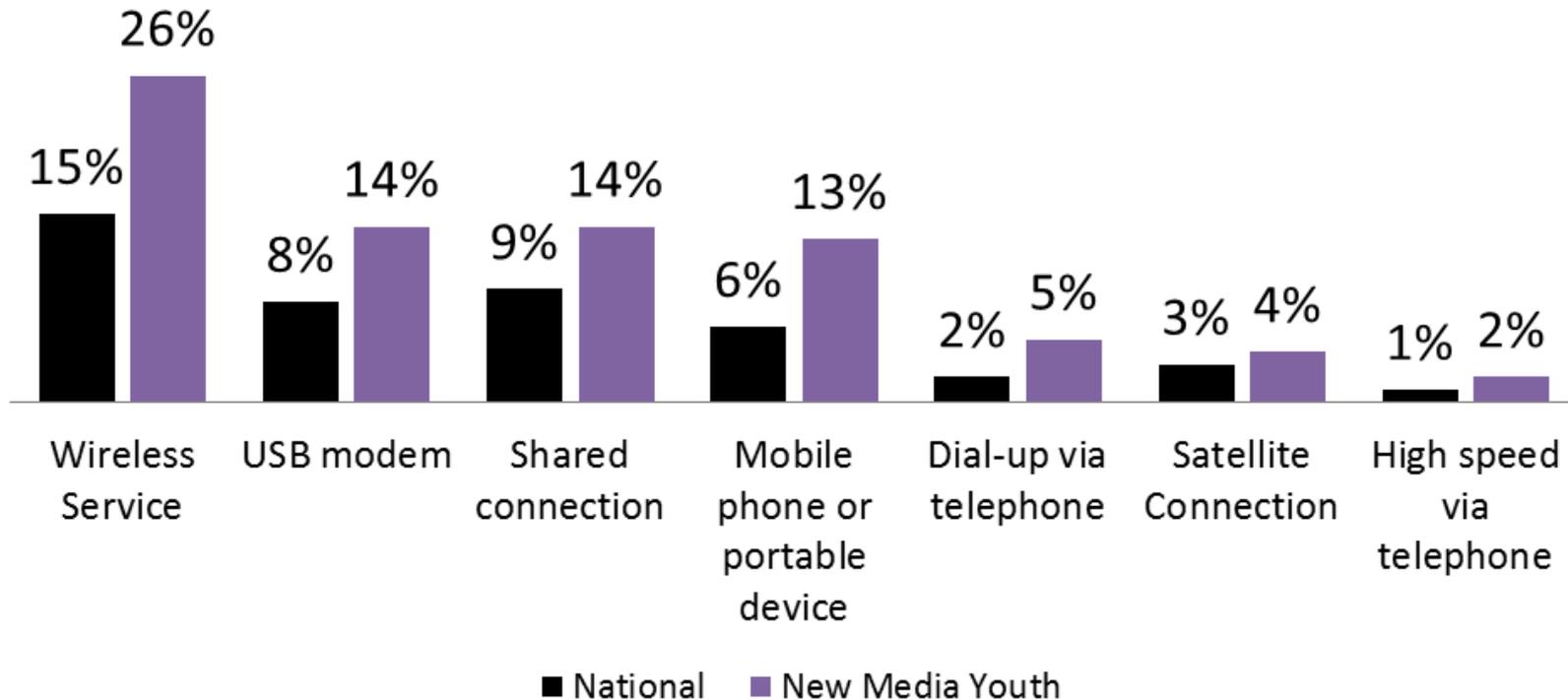


|  | National | New Media Youth |
|--|----------|-----------------|
| Iraq TV                                  | 90%      | 85%             |
| International TV (Arabic)                | 61%      | 65%             |
| International TV (non-Arabic)            | 15%      | 21%             |
| Iraq Radio                               | 37%      | 35%             |
| International Radio (non-Iraqi)          | 28%      | 27%             |
| Iraqi Newspaper (Arabic)                 | 20%      | 29%             |
| Intl Newspaper (non-Iraqi)               | 11%      | 15%             |
| Magazines                                | 14%      | 23%             |
| Friends and Family                       | 49%      | 57%             |
| Mosques/Religious Leaders                | 22%      | 26%             |
| Internet (Social Networks)               | 28%      | ▶ 71%           |
| Internet (Official News Sites)           | 26%      | ▶ 62%           |
| Blogs                                    | 17%      | ▶ 37%           |
| Mobile Phone<br>(Friends and Family SMS) | 33%      | ▶ 76%           |
| Mobile Phone<br>(Official News SMS)      | 26%      | ▶ 65%           |

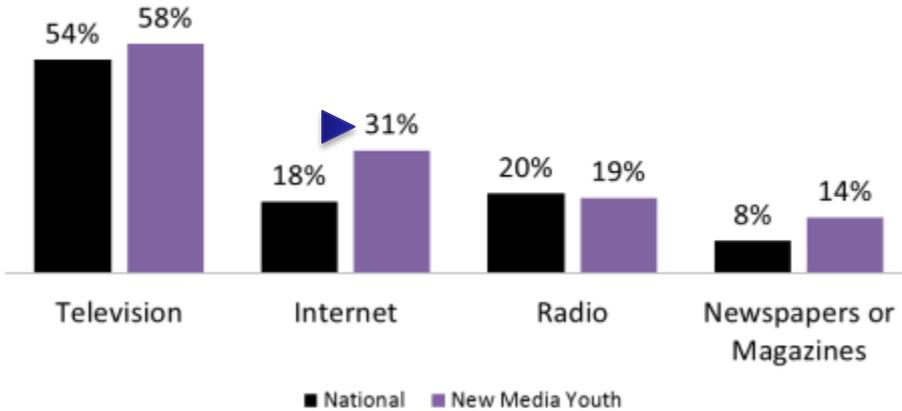
**New Media Youth are more likely to access the Internet from wireless broadcast type services.**



## Type of Internet Connection



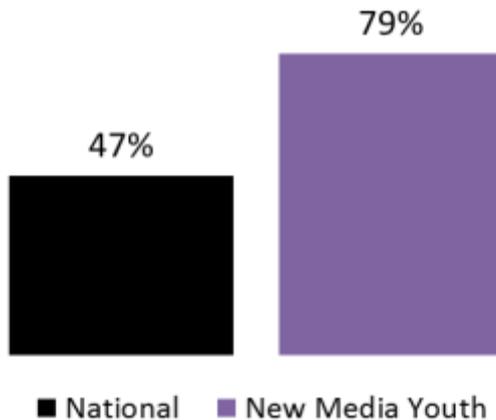
Percent spending more than 45 minutes a day using the following the news



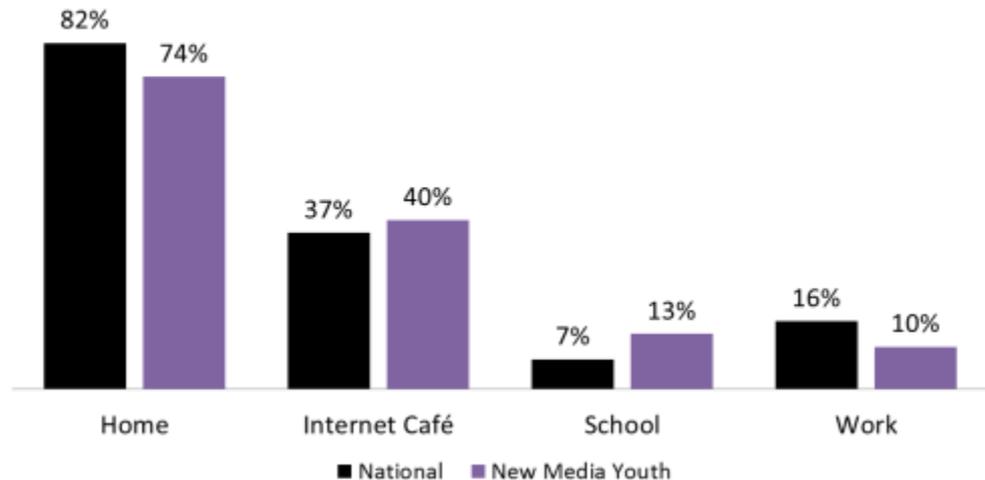
**New Media Youth are nearly twice as likely to spend more than 45 minutes a day consuming news on the Internet and are generally most likely to use their home computer.**



Percent With Access To The Internet



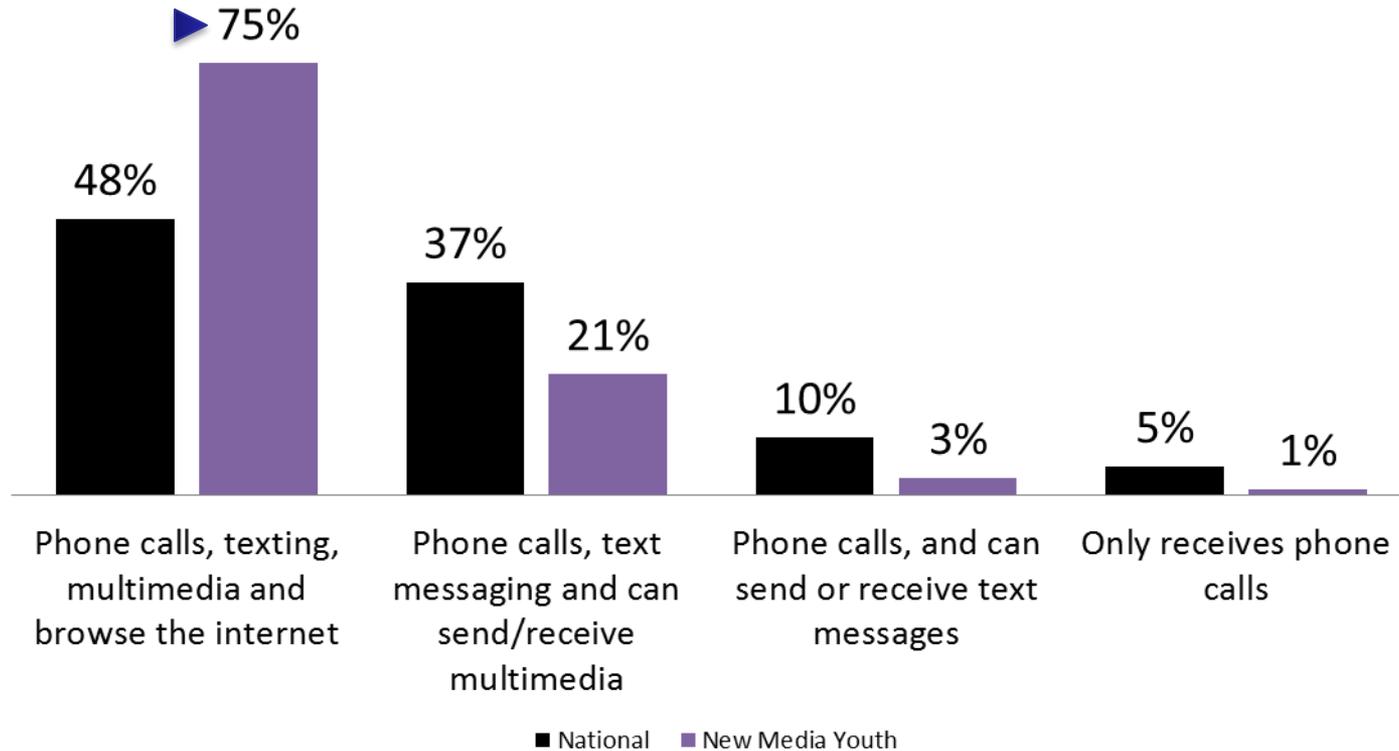
Percent Who Use A Computer At The Following Locations (Weekly Basis)



# New Media Youth are more likely to own a phone that is capable of accessing the Internet



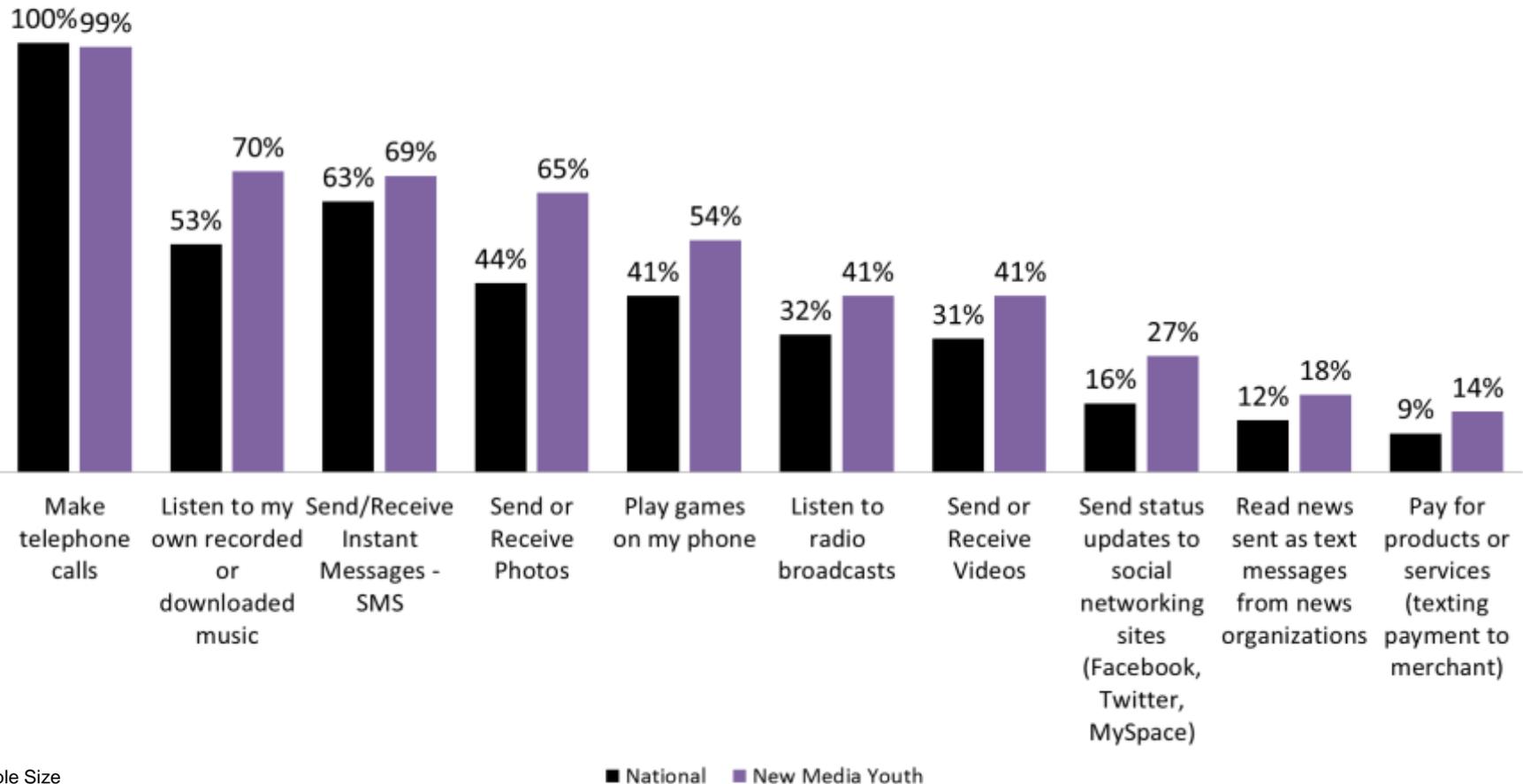
**Mobile Phone Capability**



# New Media Youth use their phones as an entertainment device almost as much as a communication device



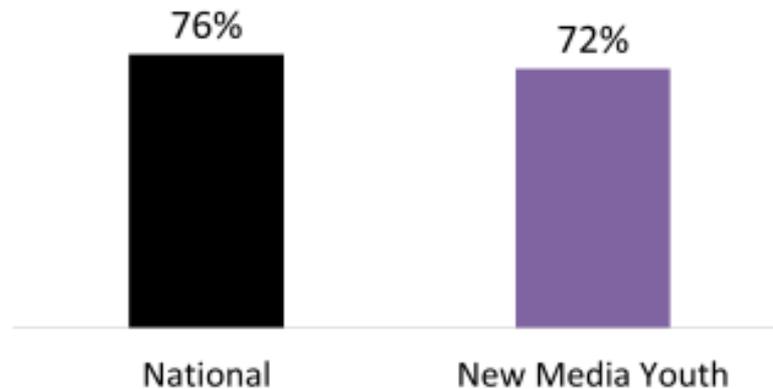
Mobile Phone Usage



**The New Media Youth are just as interested in staying informed about news and current events as the rest of Iraq**



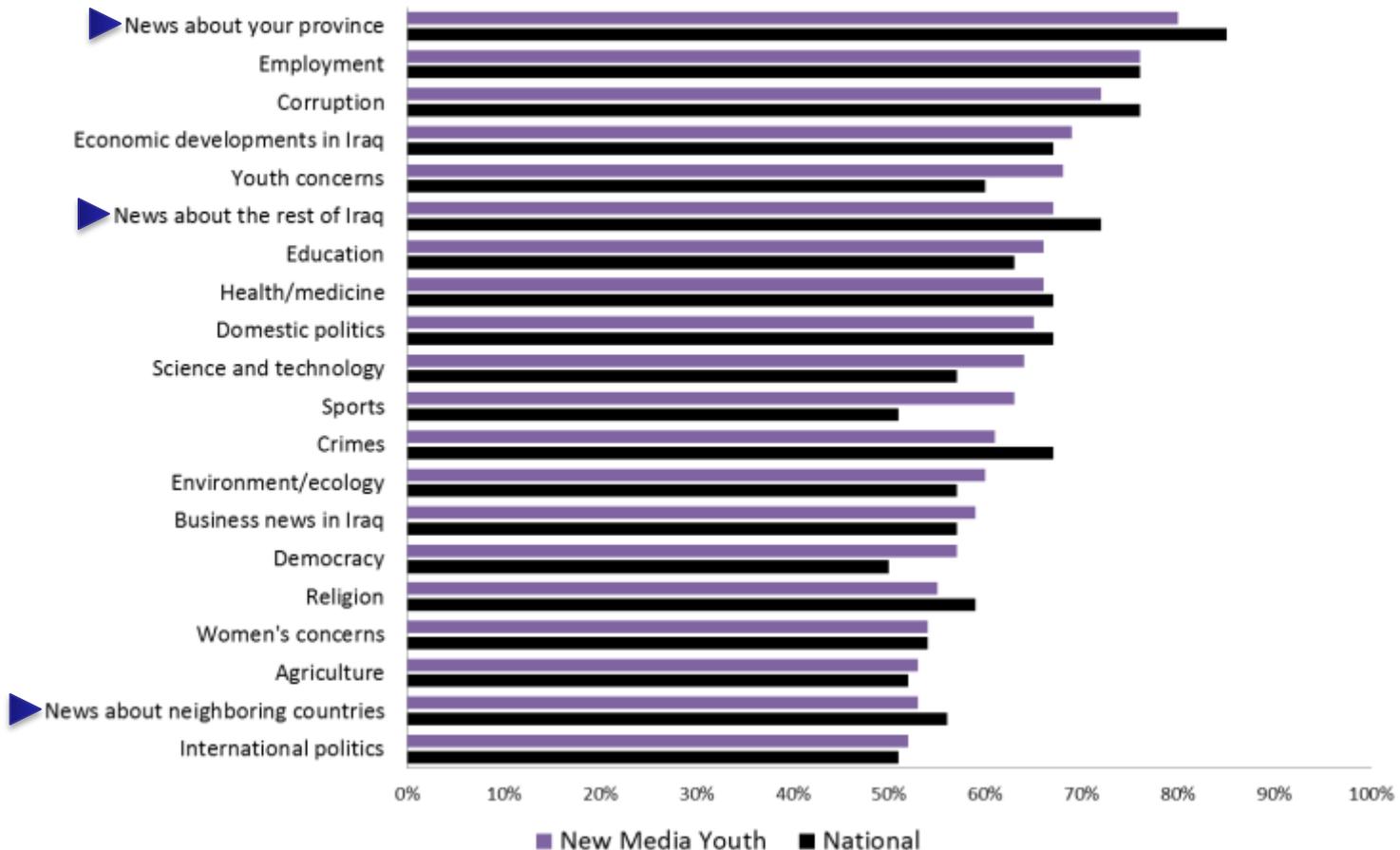
**Importance of staying informed about news and current events?**



# The New Media Youth are more interested in news events that are local or more likely to impact them directly



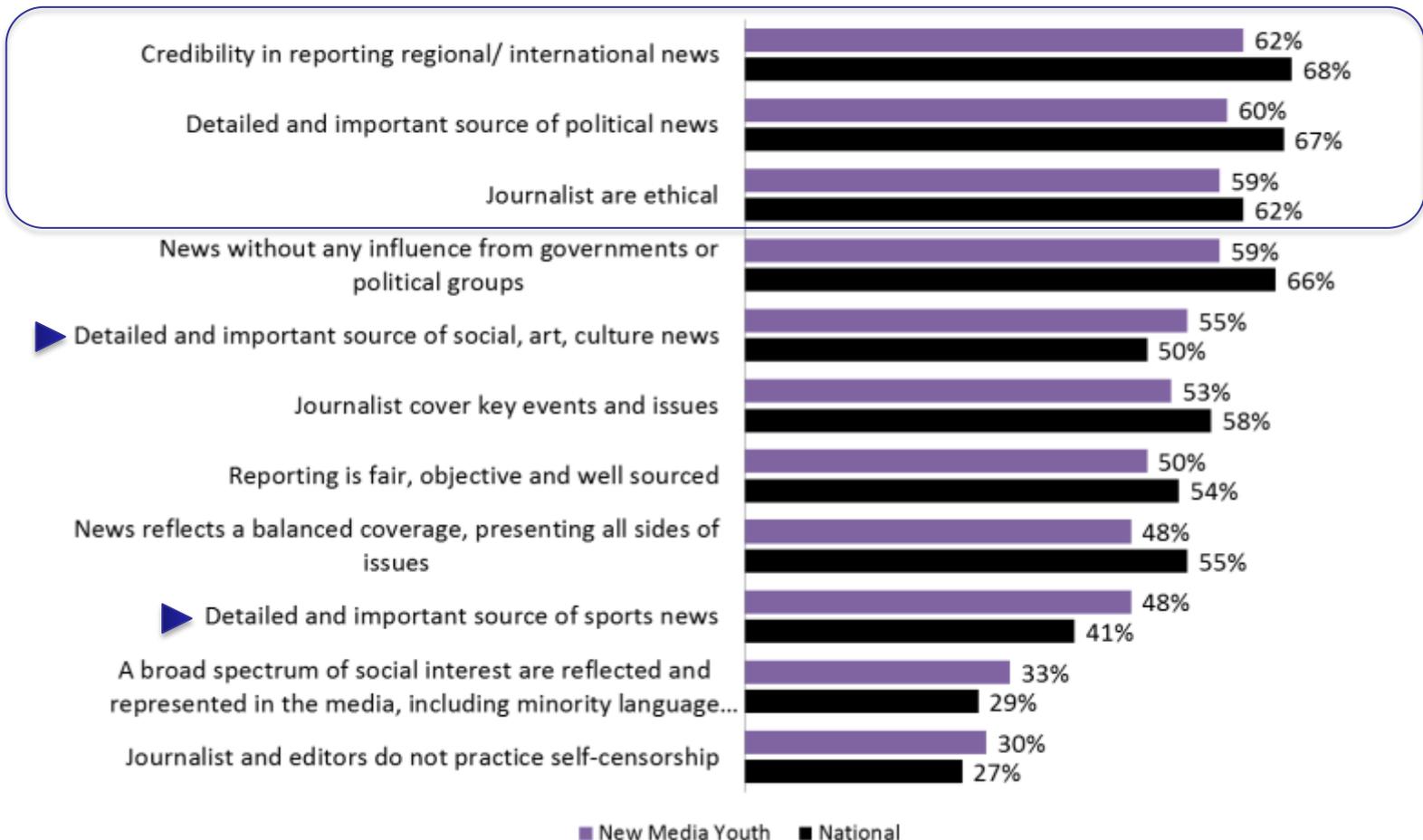
**Top News and Current Events  
 Content Interest Level**



# While importance of journalistic qualities are similar – New Media Youth are value Cultural and Sporting news more than the National population



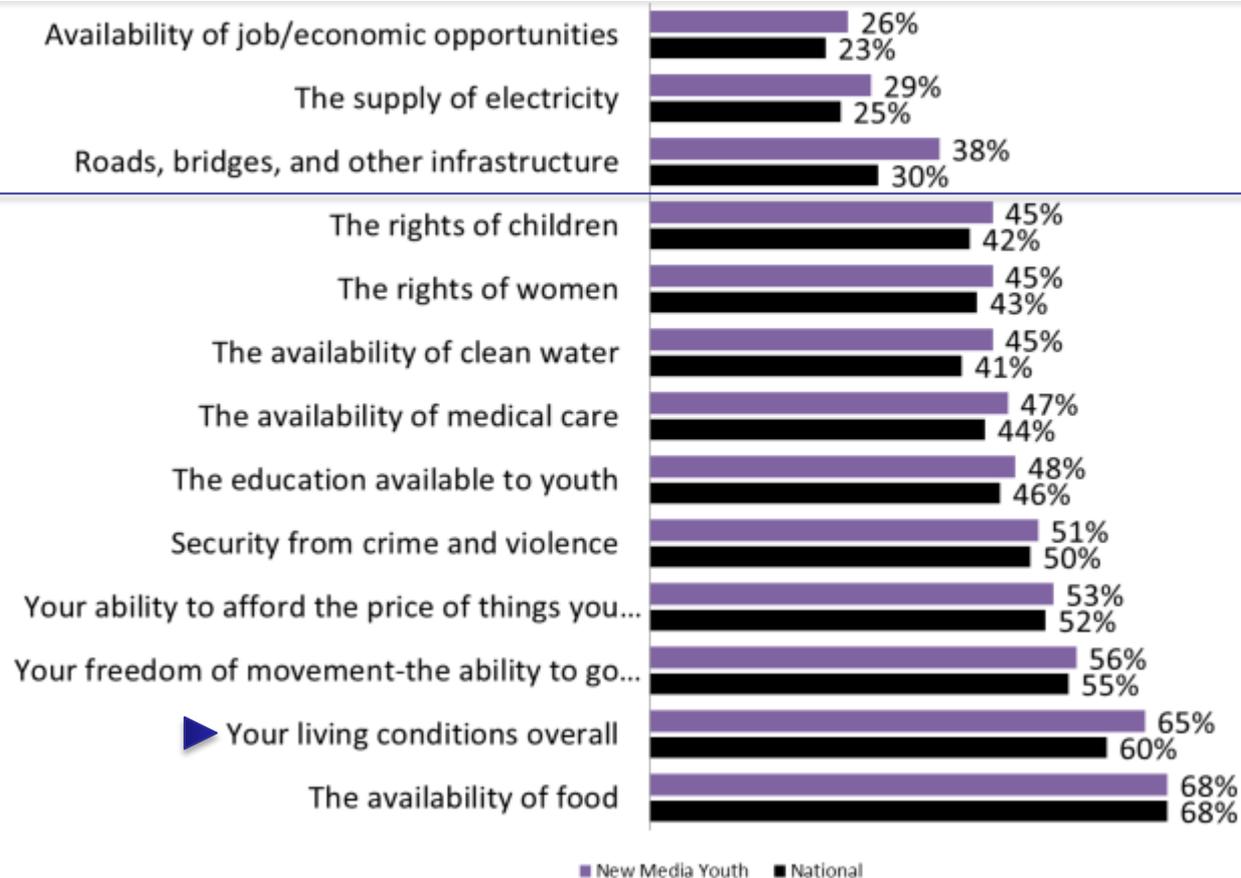
**Importance of Journalistic Qualities in Iraq**  
 (Based on a 4 or 5 in a Five Point Scale)



**The New Media Youth perceive conditions to be better than the National population (65% vs. 60%) – however the primary issues in Iraq are consistent**



**Conditions in Iraq**  
 Percent Who Perceive to be Good



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