

BBG Research Series



GALLUP®



Contemporary Media Use in Egypt



Egypt at a Glance

Findings from the World Poll

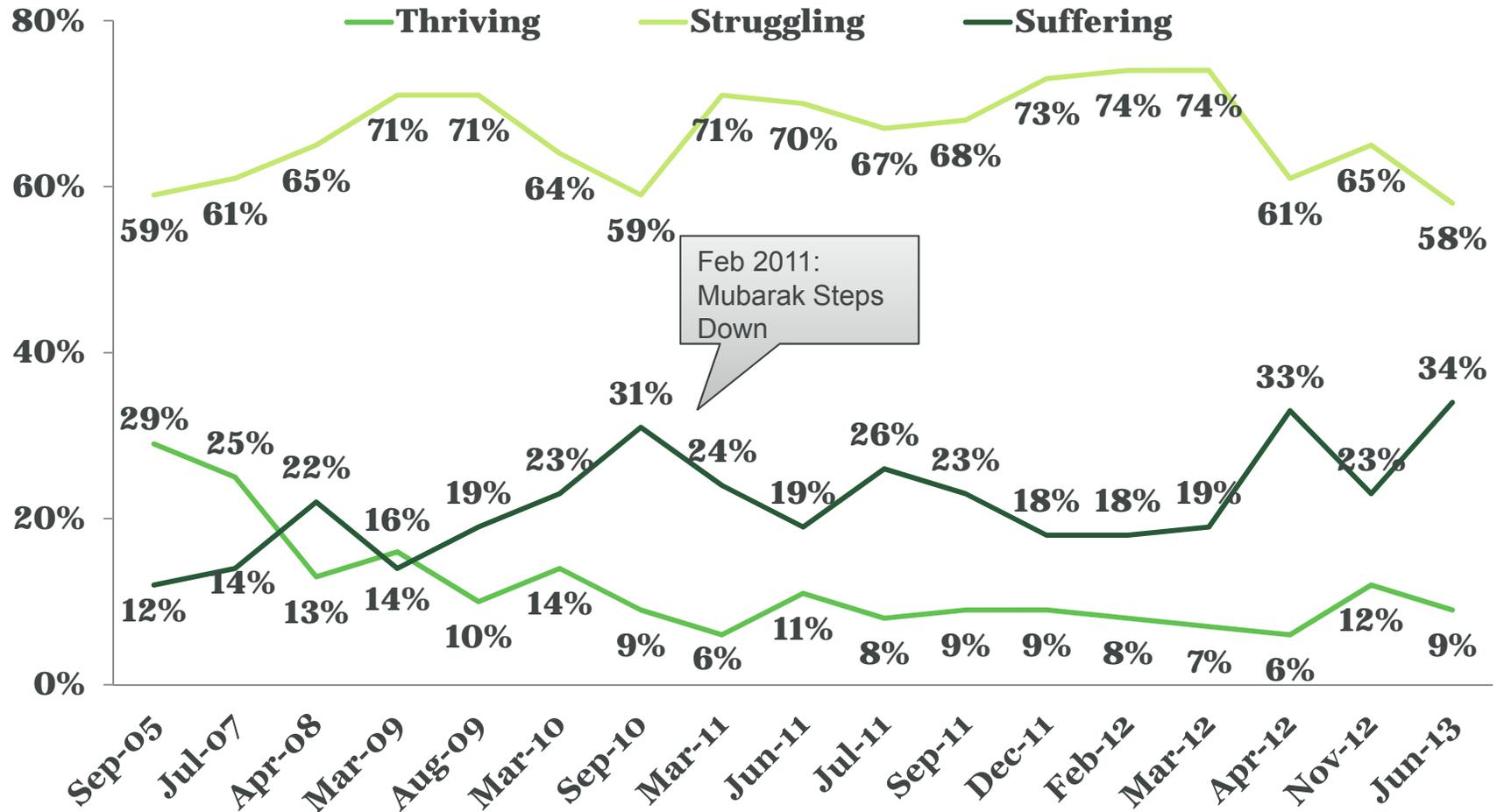
Gallup World Poll Methodology

- 17 surveys since 2005
- Last survey-June 2013
- Nationally representative of Egyptians 15 years or older. (approximately 58 million people). Only the 2005 survey was nationally representative of Egyptians 18 years or older.
- Sample size: Approximately 1,000 per survey
- Mode: Face-to-Face

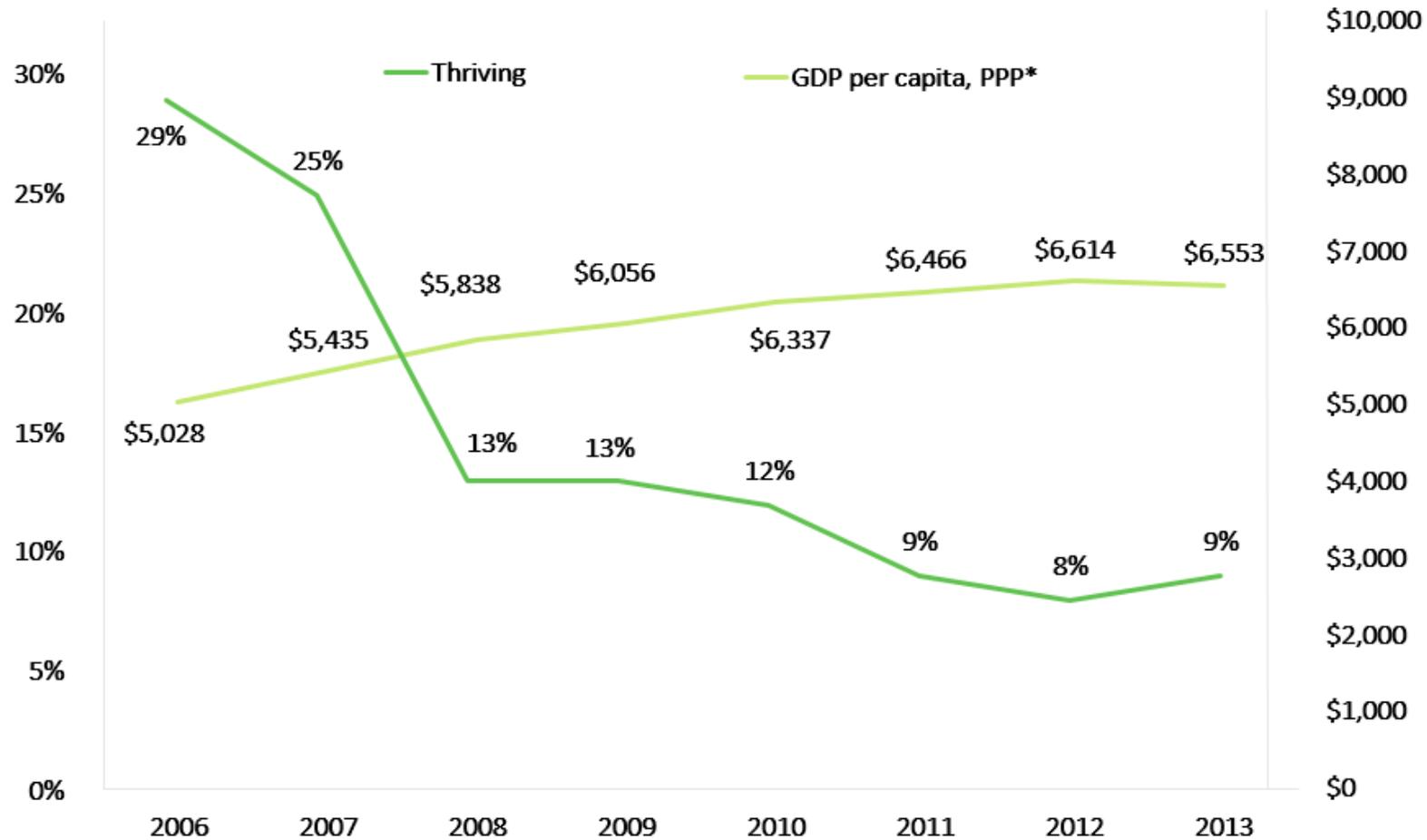


Egyptians' Life Evaluation: Suffering is at All-time High

On which step of the ladder would you say you personally feel you stand at this time? Just your best guess, on which step do you think you will stand in the future, say about five years from now?

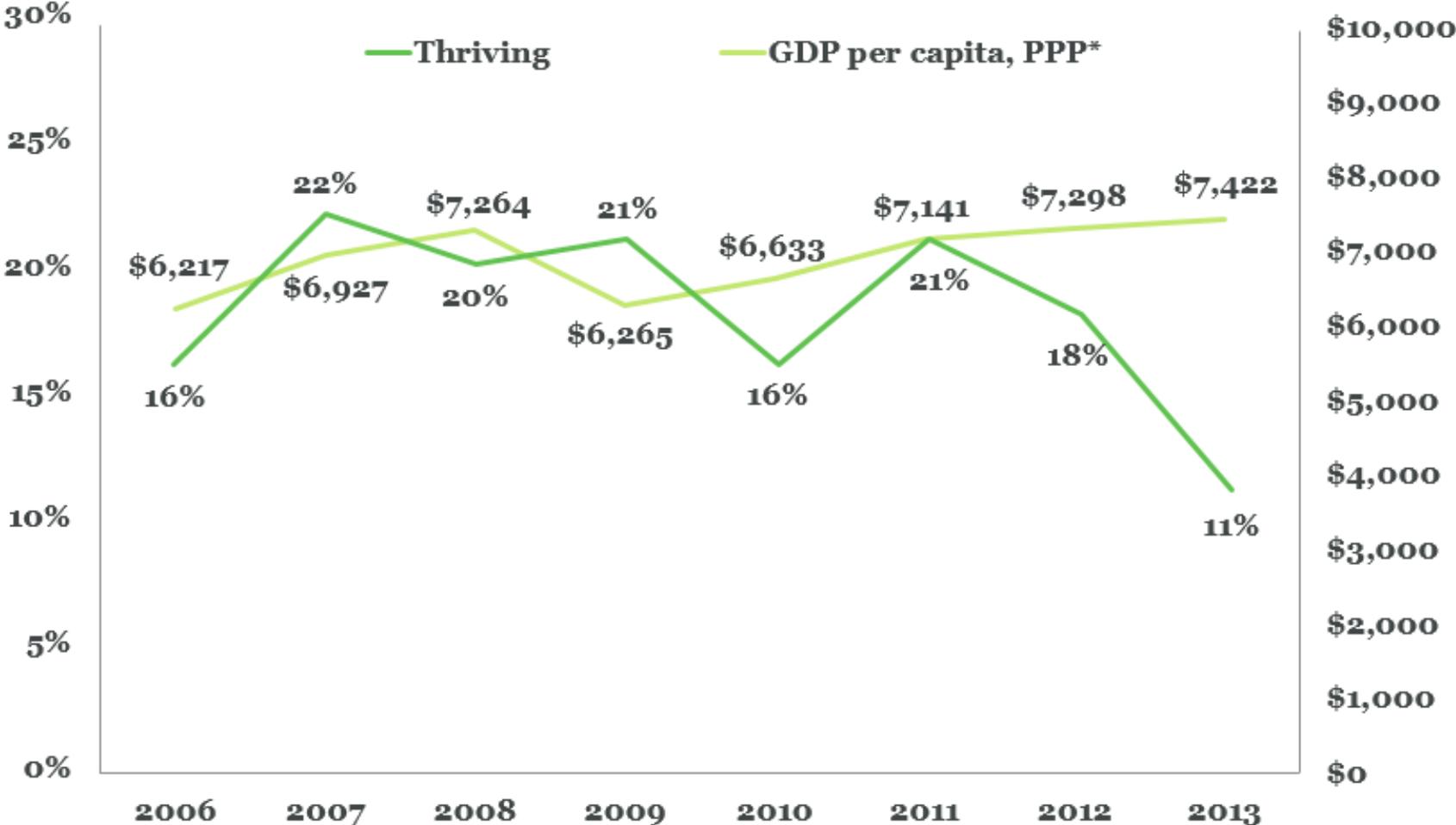


Egypt GDP and Well-Being



*In current international dollar, 2009-2012 data from World Bank, 2013 data projected by IMF

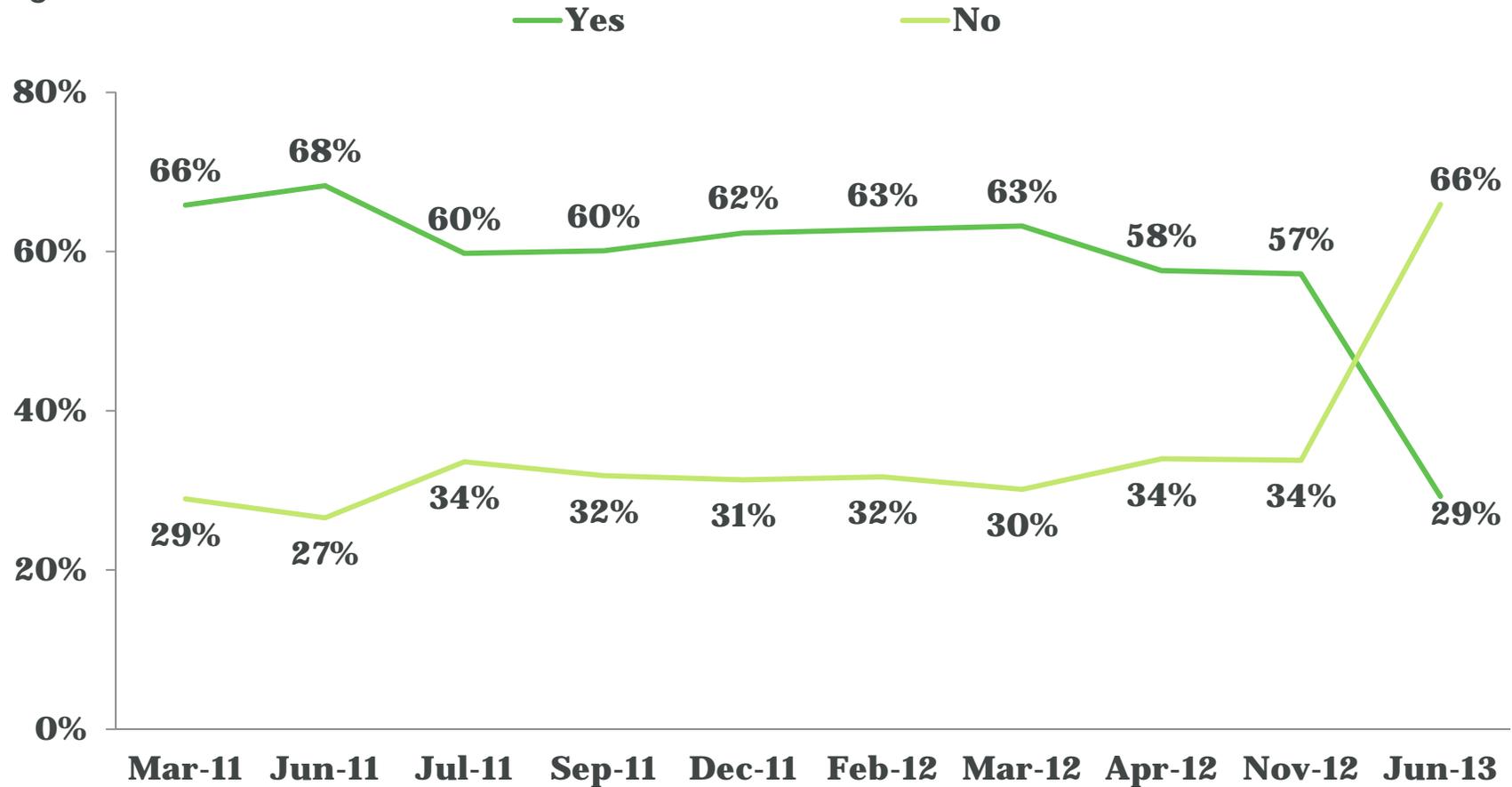
Ukraine GDP and Well-Being



*In current international dollar, 2009-2012 data from World Bank, 2013 data projected by IMF

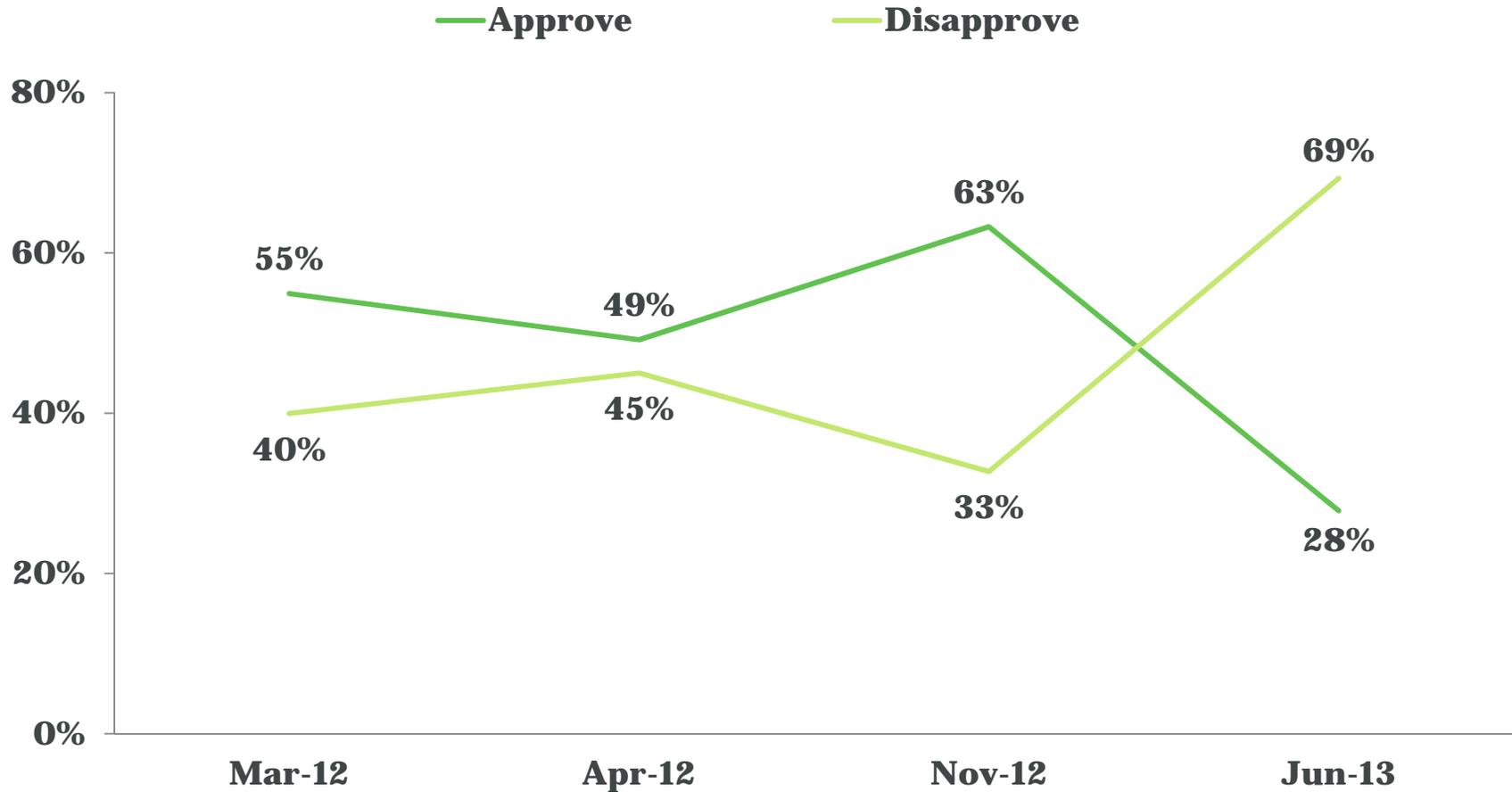
Egyptians' Confidence in the Government is at a Low

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



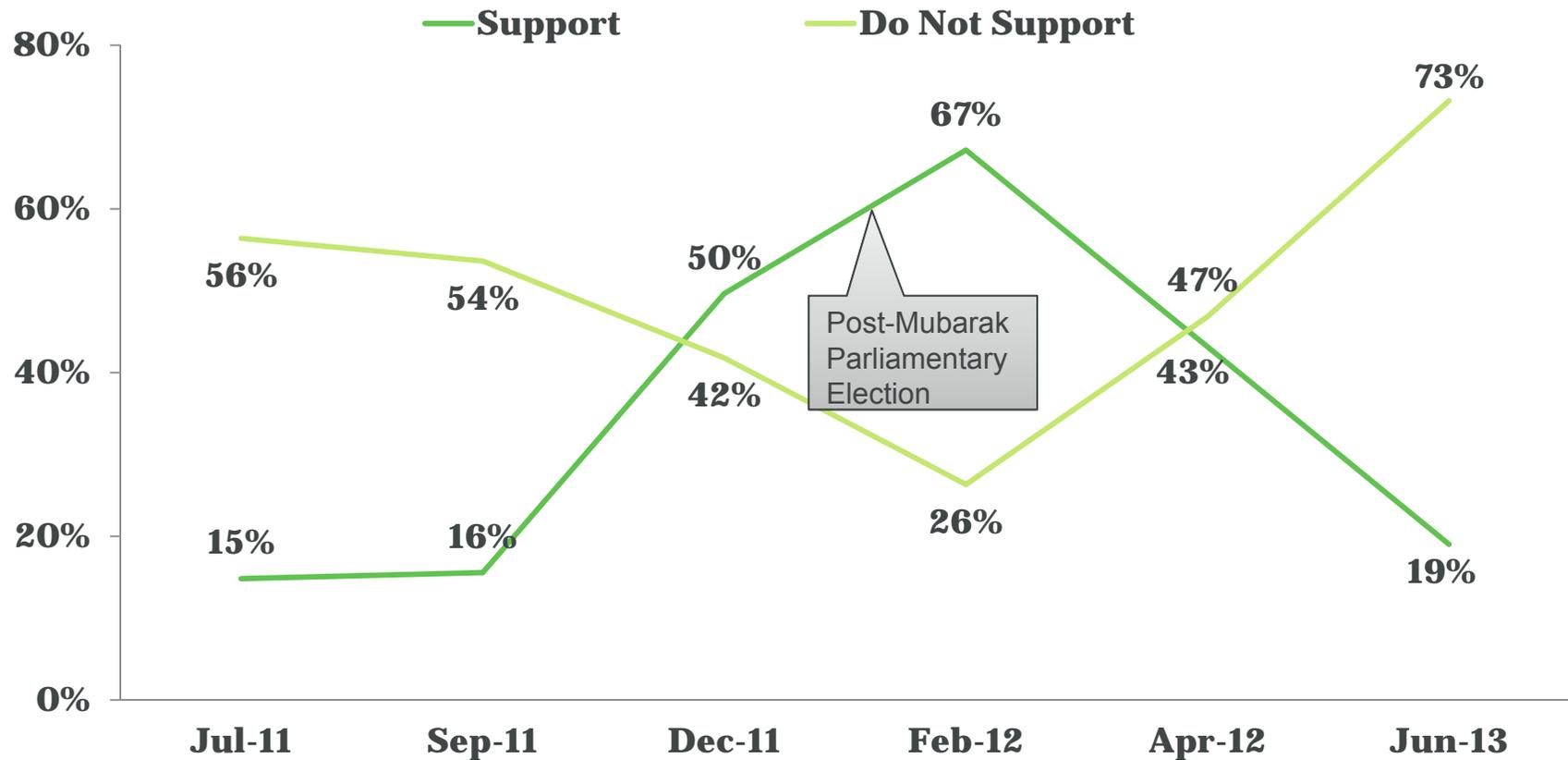
Approval of Leadership Crashed

Do you approve or disapprove of the job performance of the leadership of this country?



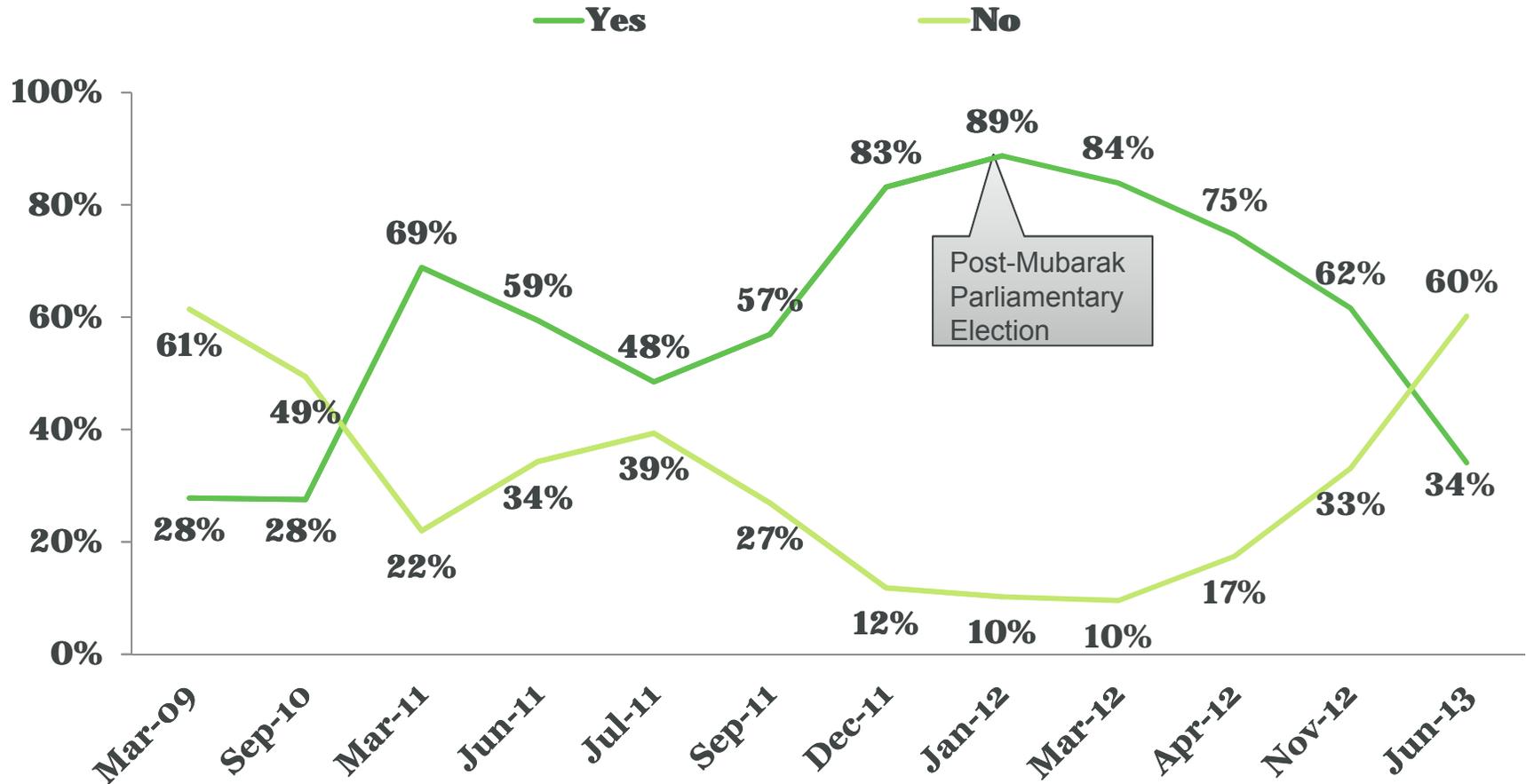
Support for Morsi's Party has Deteriorated

Please indicate whether you support or do not support each of the following political parties or groups. The Freedom and Justice Party



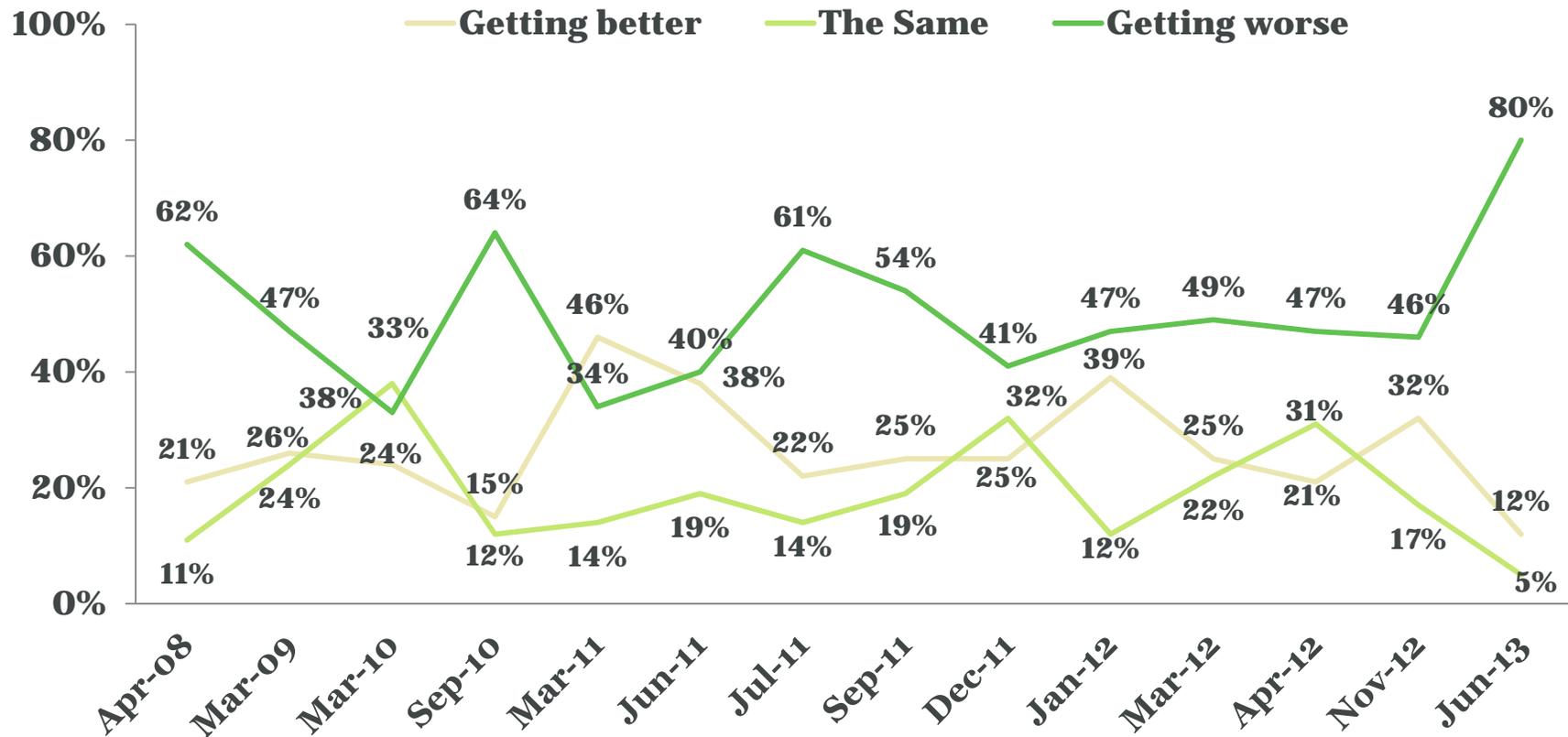
Confidence in Elections is in Severe Decline

In this country, do you have confidence in each of the following, or not? How about honesty of elections?



Perception of the Economy is Negative

Right now, do you think that economic conditions in this country, as a whole, are getting better or getting worse?

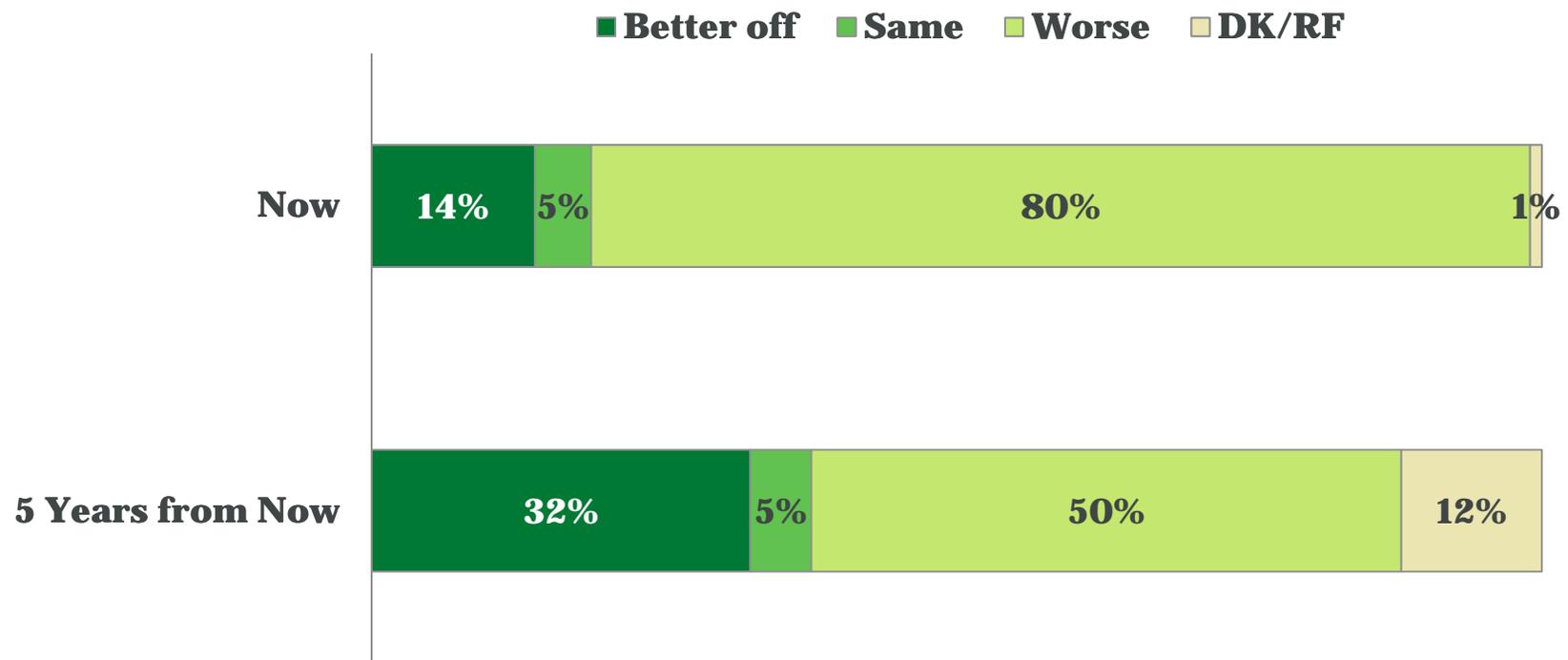




Pre and Post Mubarak

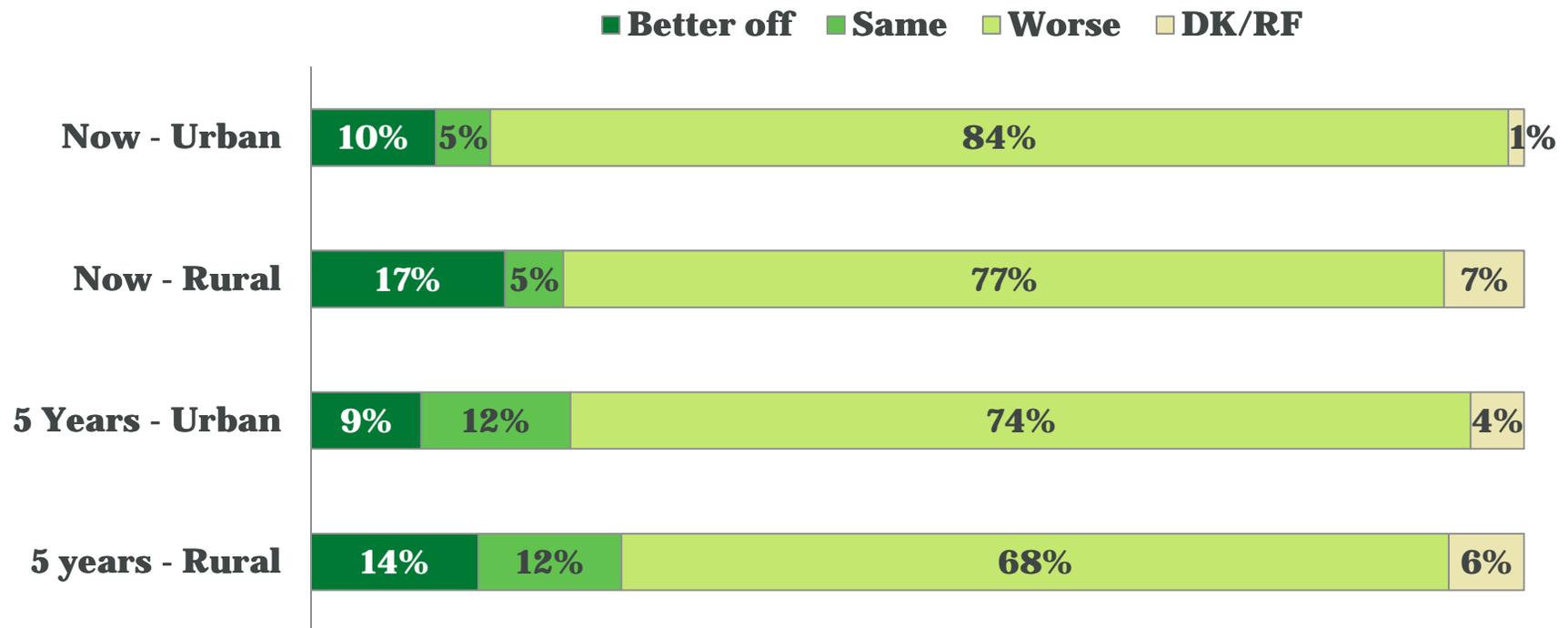
Pessimism Following the Fall of Mubarak

Do you think Egypt is better off or worse off now than it was before the resignation of President Mubarak? What about in 5 years?



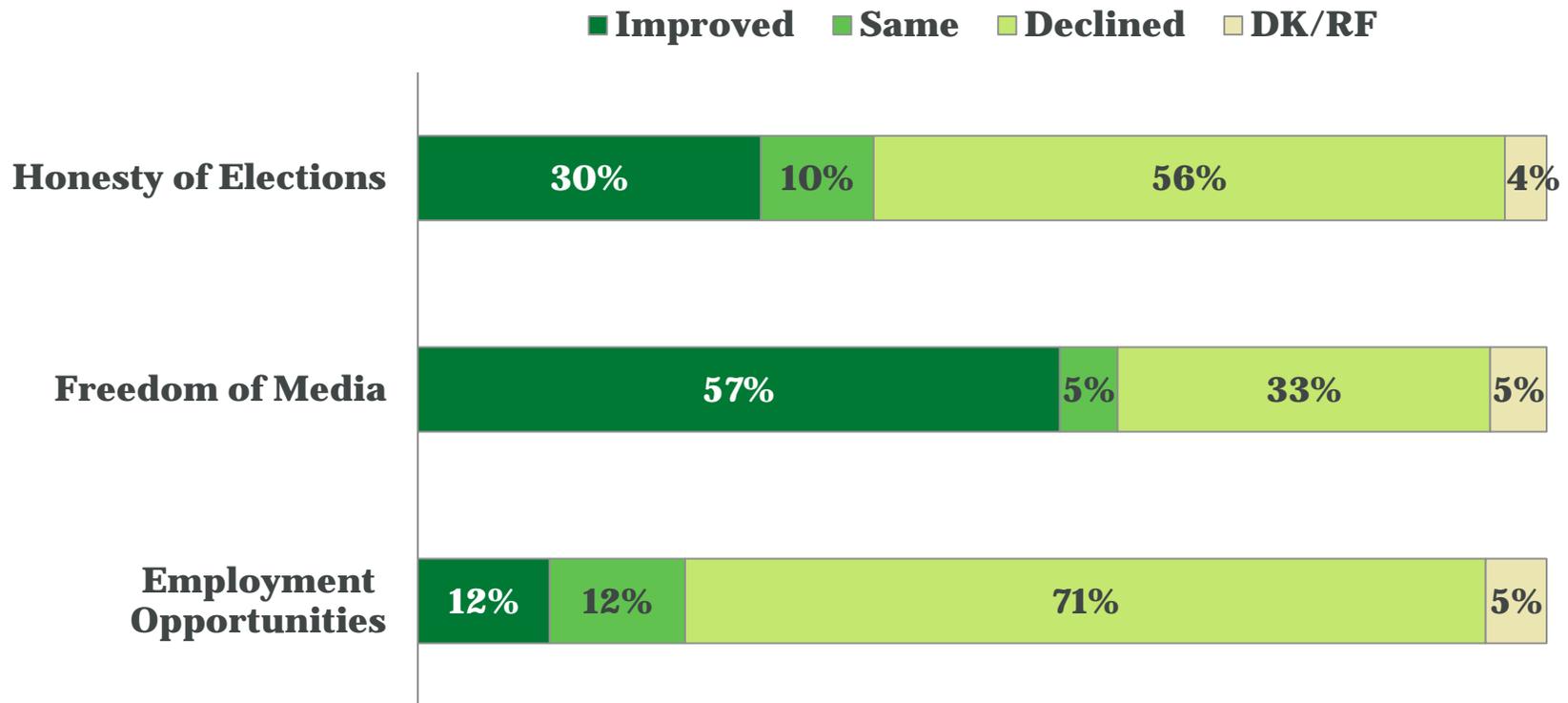
Higher Urban Pessimism Following the Fall of Mubarak

Do you think Egypt is better off or worse off now than it was before the resignation of President Mubarak? What about in 5 years?



Declining Employment, Election Honesty Since Mubarak

Do you think the honesty of elections in Egypt has improved or declined since the resignation of President Mubarak? What about the freedom of media, employment opportunities, honesty of elections?



Bottom Line

- Life evaluation continues to be most important metric in getting a sense of where Egyptians see things headed in their country.
- Confidence in leadership, more importantly in institutions, continues to be a major factor for moving the country beyond the 'transition' phase.
- Initial hope post Mubarak ouster has mostly dwindled on economic as well as political issues.
- In June of 2013, perceptions on freedom of media since Mubarak ouster were one of the only bright spots.



2013 Media Survey

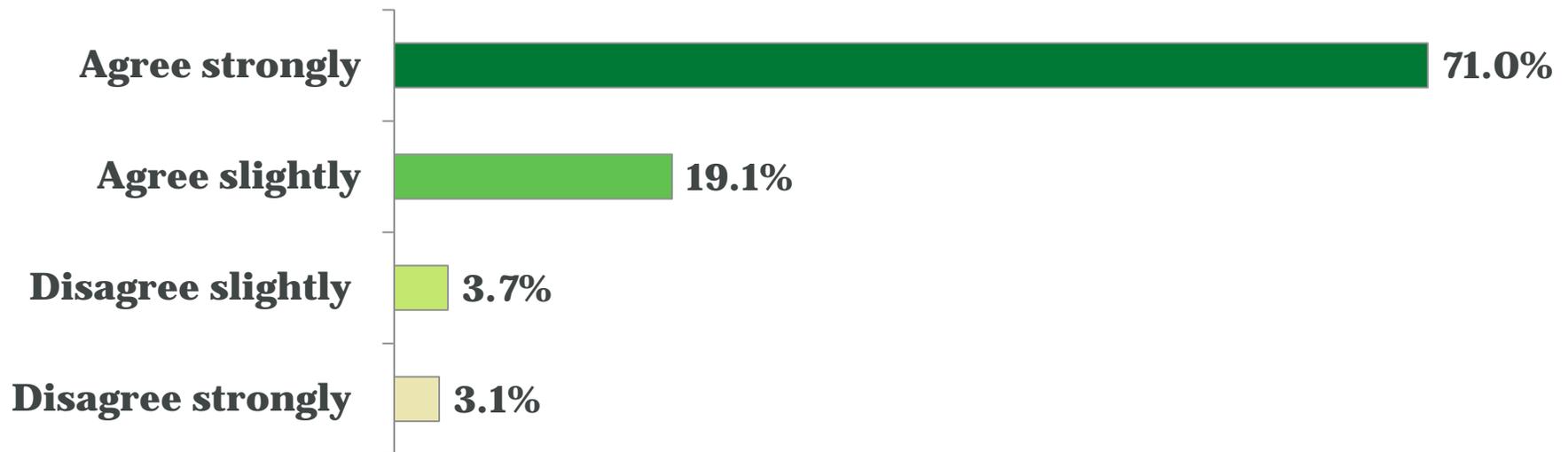
Egypt National Media Survey Methodology

- National media survey of 2,000 Egyptian adults (aged 15 and older)
- 98.2% of the adult population or 57,391,000
- Five frontier governorates (Matruh, Red Sea, New Valley, North Sinai, and South Sinai) excluded
- Fieldwork 13 – 26 December 2013
 - Almost 6 months after the removal of former President Morsi (July 13, 2013)
 - Muslim Brotherhood declared a terrorist group (25 December)



Egyptians Recognize the Importance of Media in their Society

To what extent do you agree that objective and independent media are important for Egypt's future? (n=2,000)



News about Egypt is of primary interest:

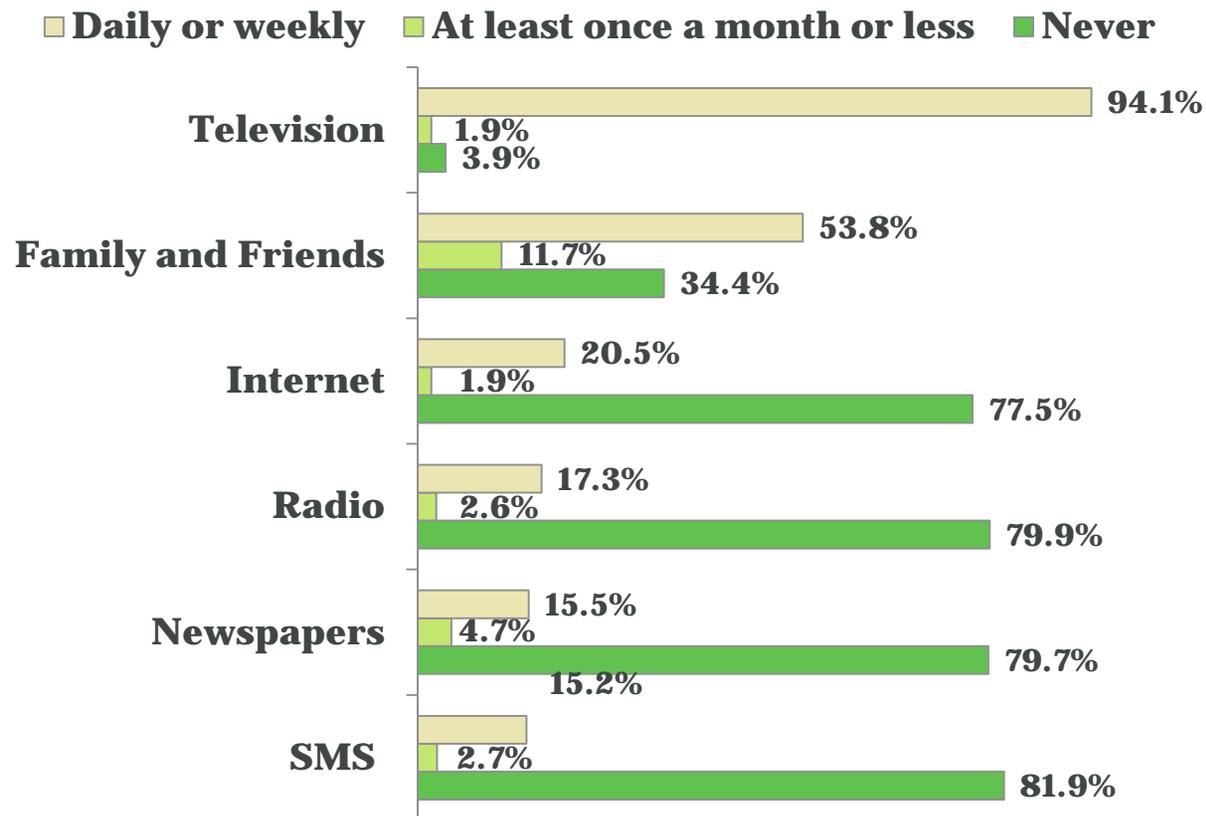
- 70% of Egyptians are **very interested** in news about Egypt versus 16.7% in news of the Arab world.



What Media are Egyptians Using?

Television Predominates as a Source of News.

For each one of the sources I mention, how often do you use that source to get news? (n=2,000)



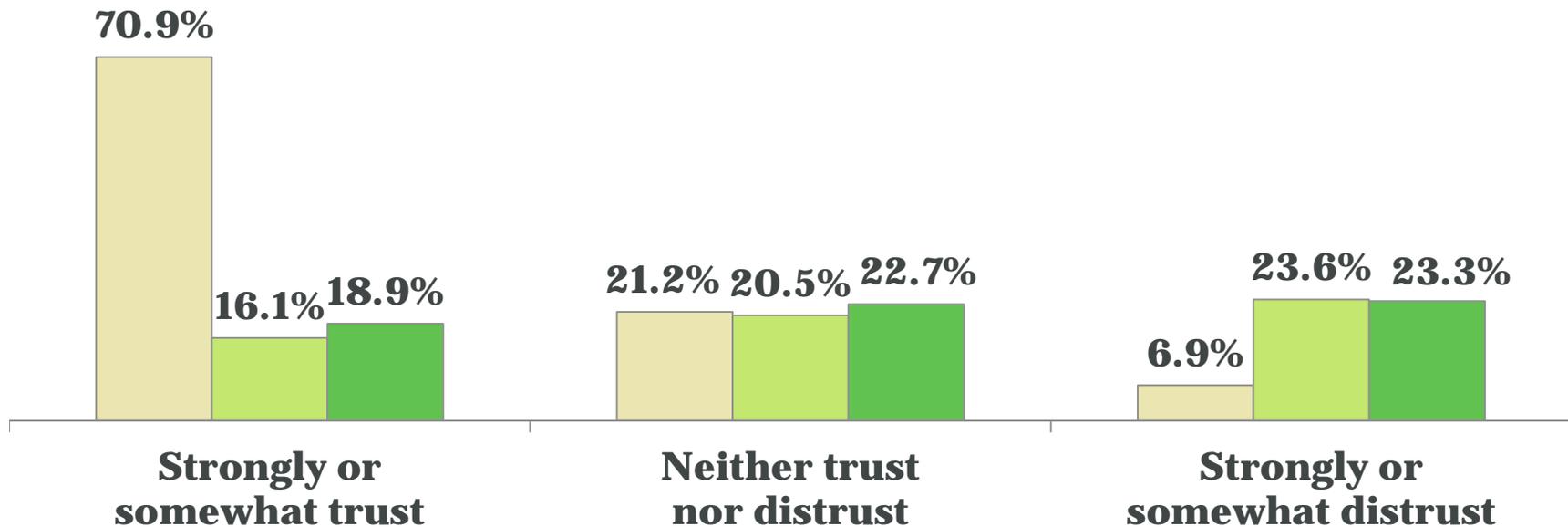


What do Egyptians Think About Television?

Trust in Television is Relatively High...

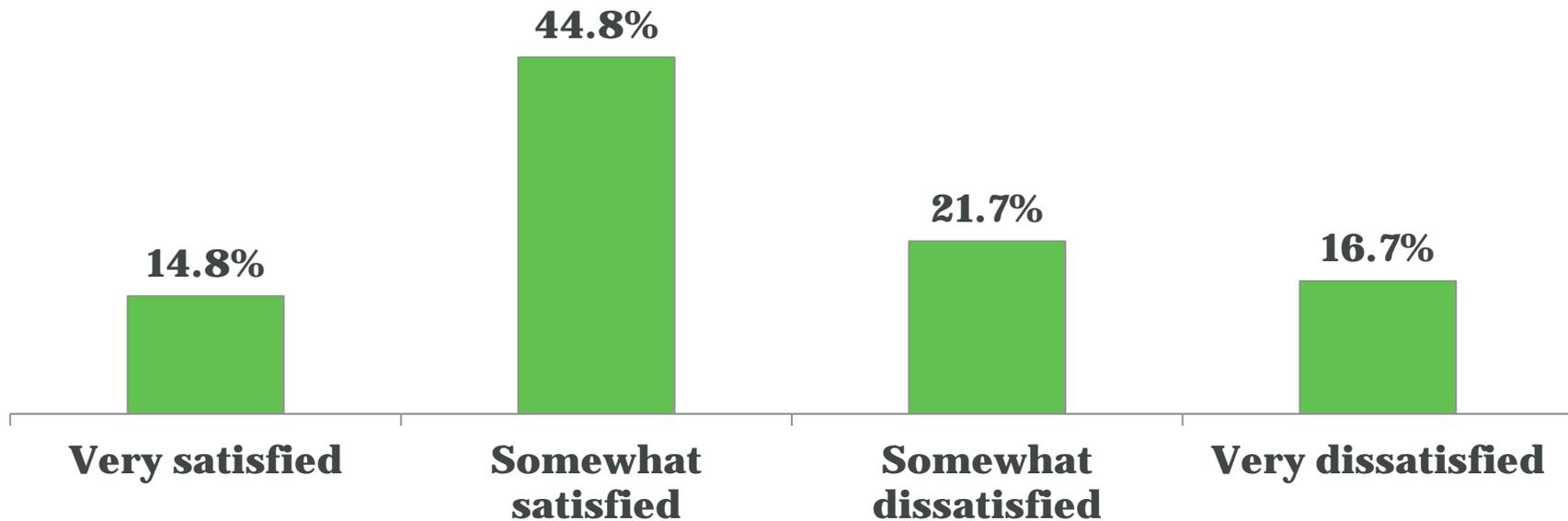
Please tell me how much you trust the news and information available on television? (n=2,000)

■ TV ■ Radio ■ Internet



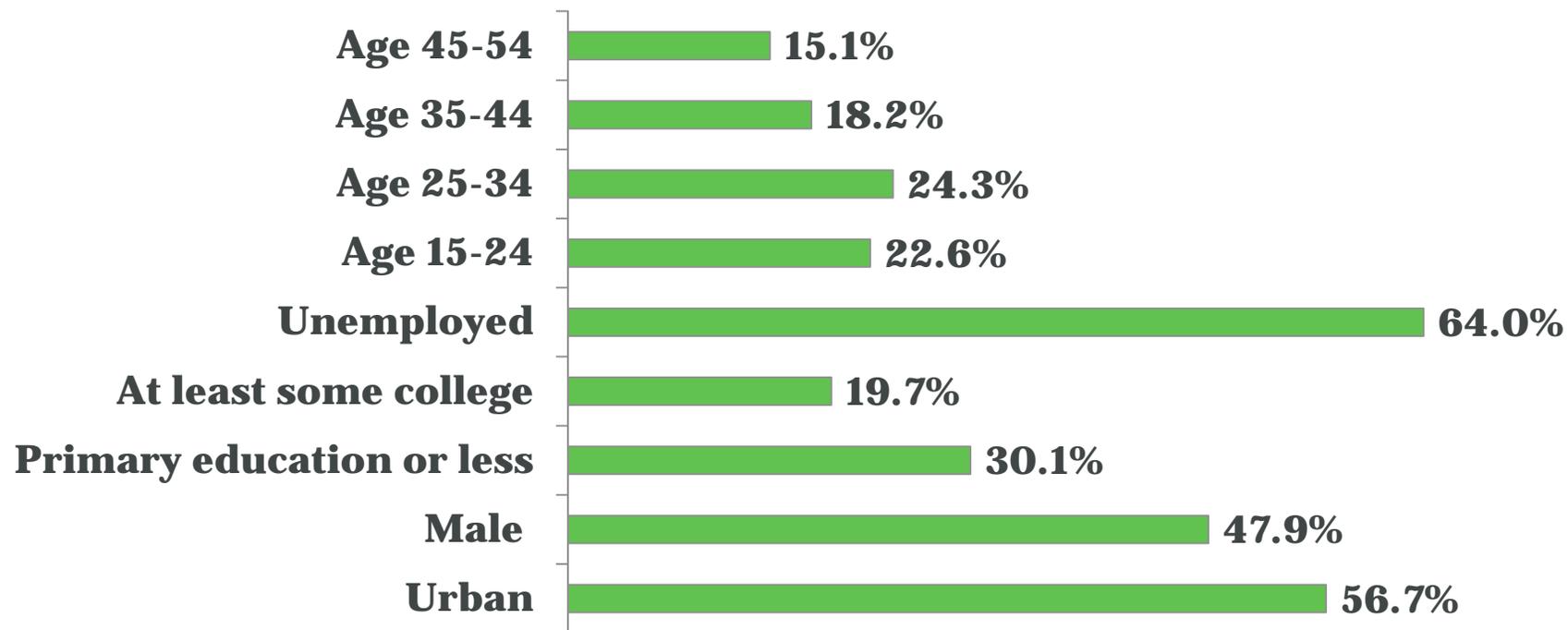
...But Many are Dissatisfied with TV Coverage of Egypt.

Please tell me how satisfied you are with the information on television about political developments in Egypt? (n=2,000)



Who is Dissatisfied?

Demographics of those who are somewhat or very dissatisfied with television coverage of Egypt (n=801)

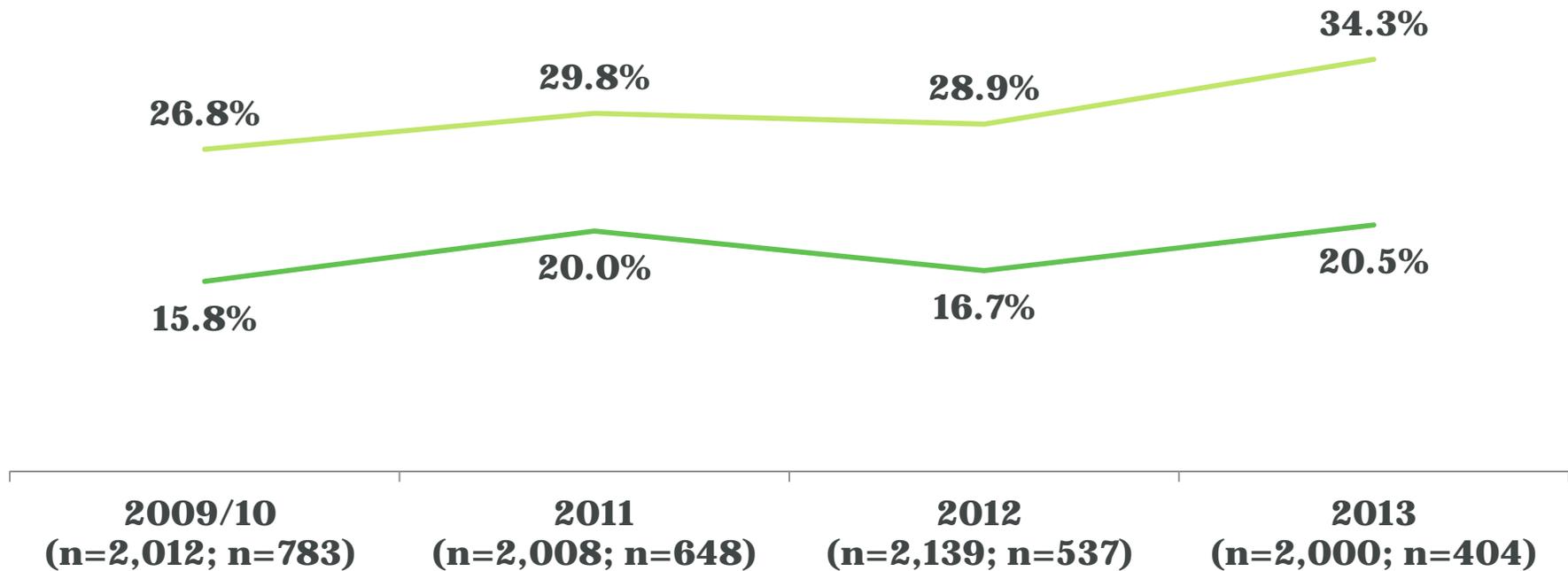


More urban, more educated, and older than Egyptians overall

Internet Usage for News is Increasing Gradually...

Percent using Internet in past week for news

— All Egyptians — 15-24 year olds



...and Internet Users are Heavy Social Media Users

- Among past week Internet users:
 - 80% have accessed the Internet in the past week to get the latest news
 - 70% have accessed the Internet in the past week to watch online video
 - 63% have visited Youtube.com and 76% have visited Facebook in the past week

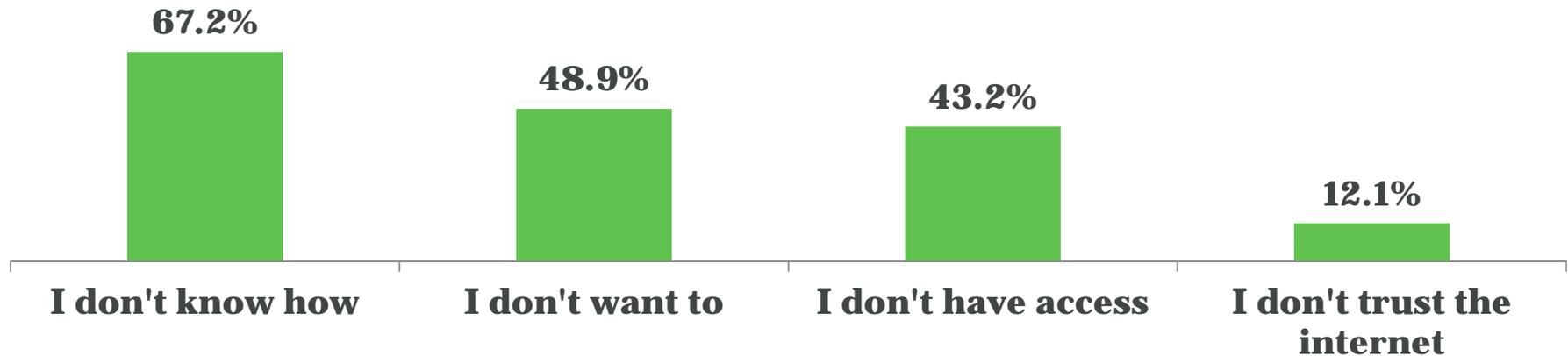


Most Egyptians Have Never Used the Internet.

- 73% of Egyptians say they *have never used the Internet* including:
 - 52% of 15-24 year olds;
 - 70% of 25-34 year olds;
 - 63% of men;
 - 83% of women

Lack of Know-how and Access Limits Internet usage

For what reasons have you not used the Internet in the last 4 weeks?
(n=1,468 have not used Internet
in past 4 weeks)

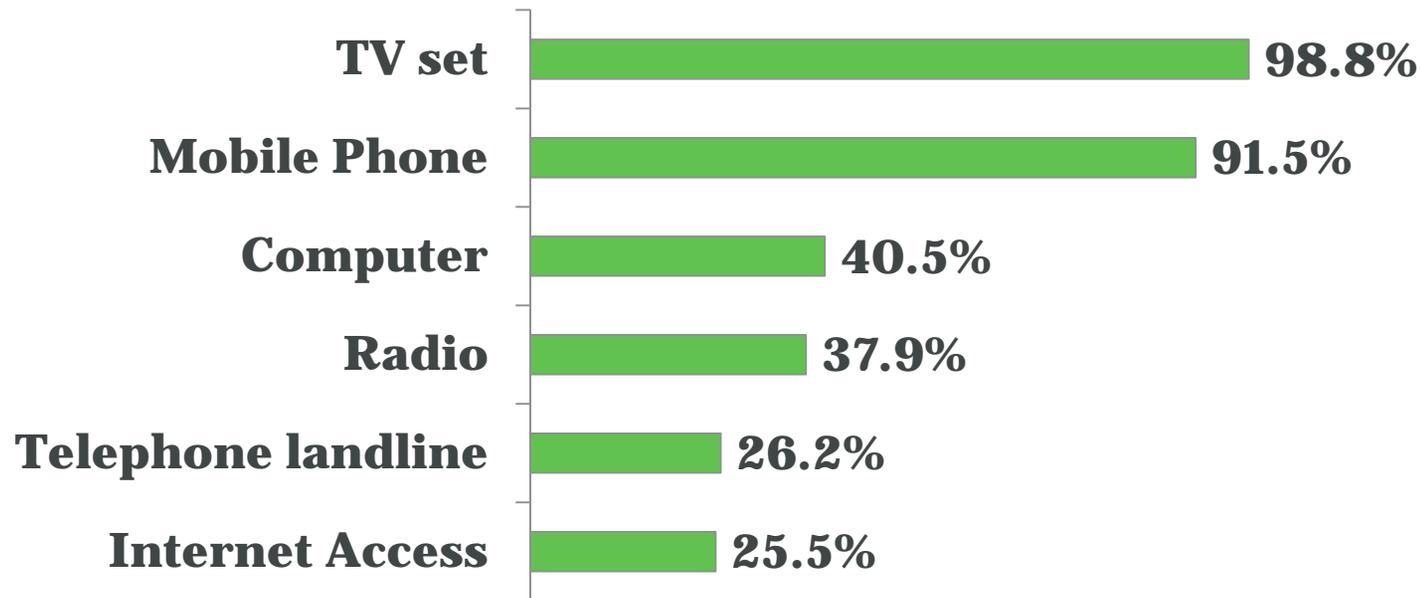


- Those who don't know how or don't want to use the Internet are more likely to be women of a mix of ages and urban/rural locations.
- 41% are male



Mobile Phones Ownership Virtually Universal...

Which, if any, of the following do you have working in your household?
(n=2,000)

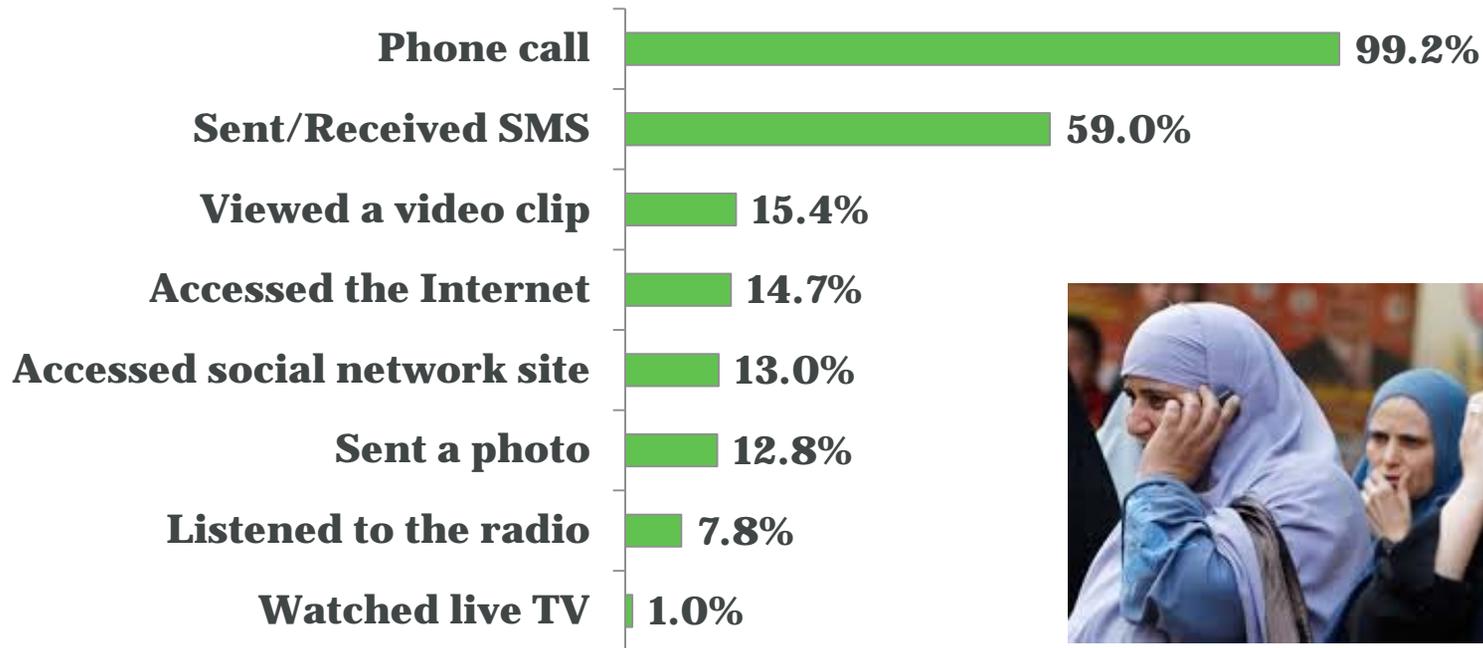


- Recent World Bank report finds subscriptions to mobile broadband increasing much faster than fixed.*
- 23% say they own smart phones, according to 2012 BBG data

*(Broadband Networks in the Middle East: Accelerating High-Speed Internet Access, World Bank, 2014)

...But Primarily Used for Phone Calls

Which of the following have you done with a mobile phone in the past 7 days? (n=1,870 own mobile or has access to mobile of someone else)



- Only 14% of smart phone owners have used an app on their smart phone in the past week

Implications for International Broadcasters

- TV remains the preeminent news source but many are not finding the content they want.
- Opportunities to reach niche audiences through Internet and mobile phones:
 - Internet training could broaden potential audience.
 - Growth in mobile broadband could broaden potential audience for mobile communications.



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Upcoming BBG Research Series events:

– Tuesday, April 29: Nigeria

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