

BBG Research Series

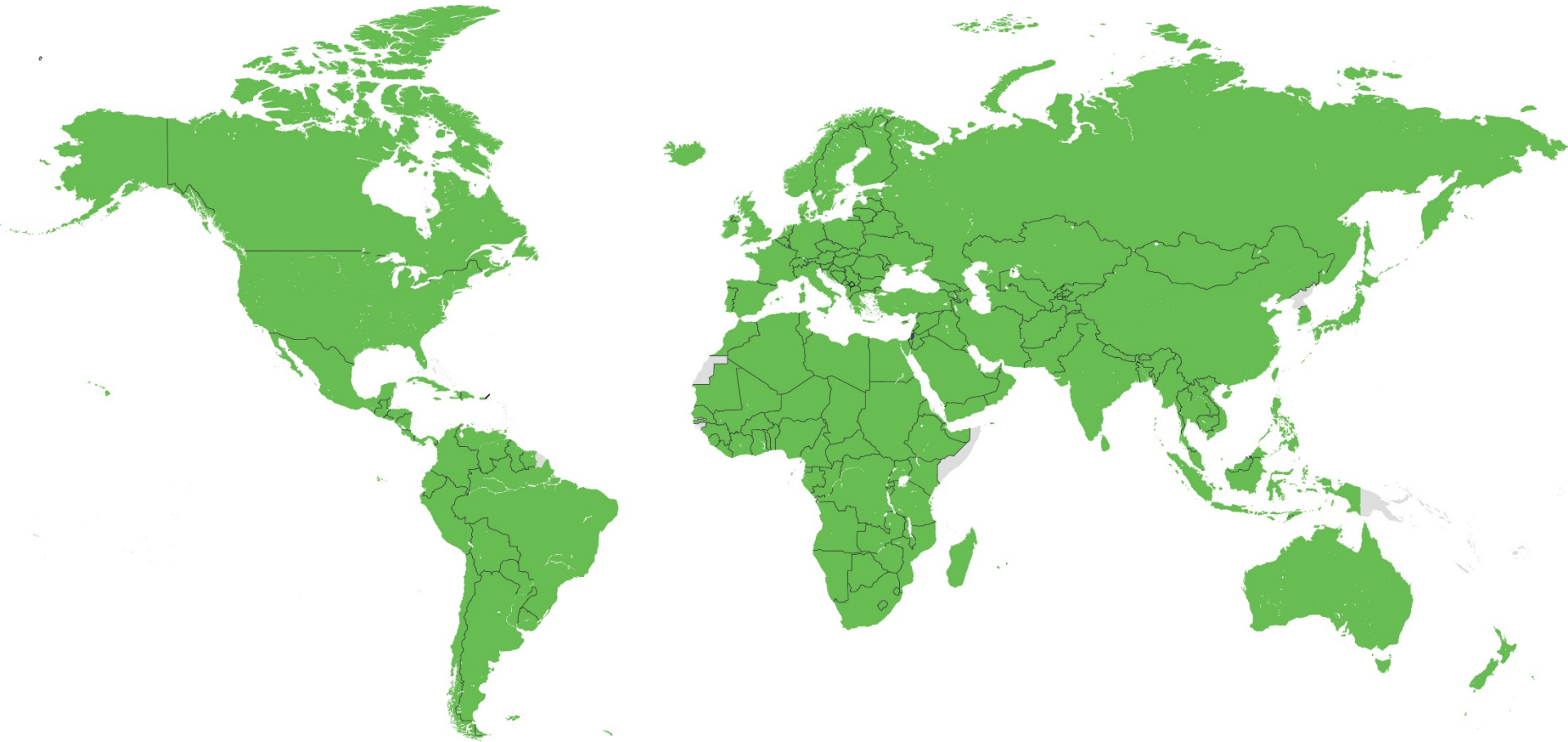


Media Use in Iraq and Iraqi Kurdistan

Iraq

Findings from the World Poll

Gallup World Poll Coverage



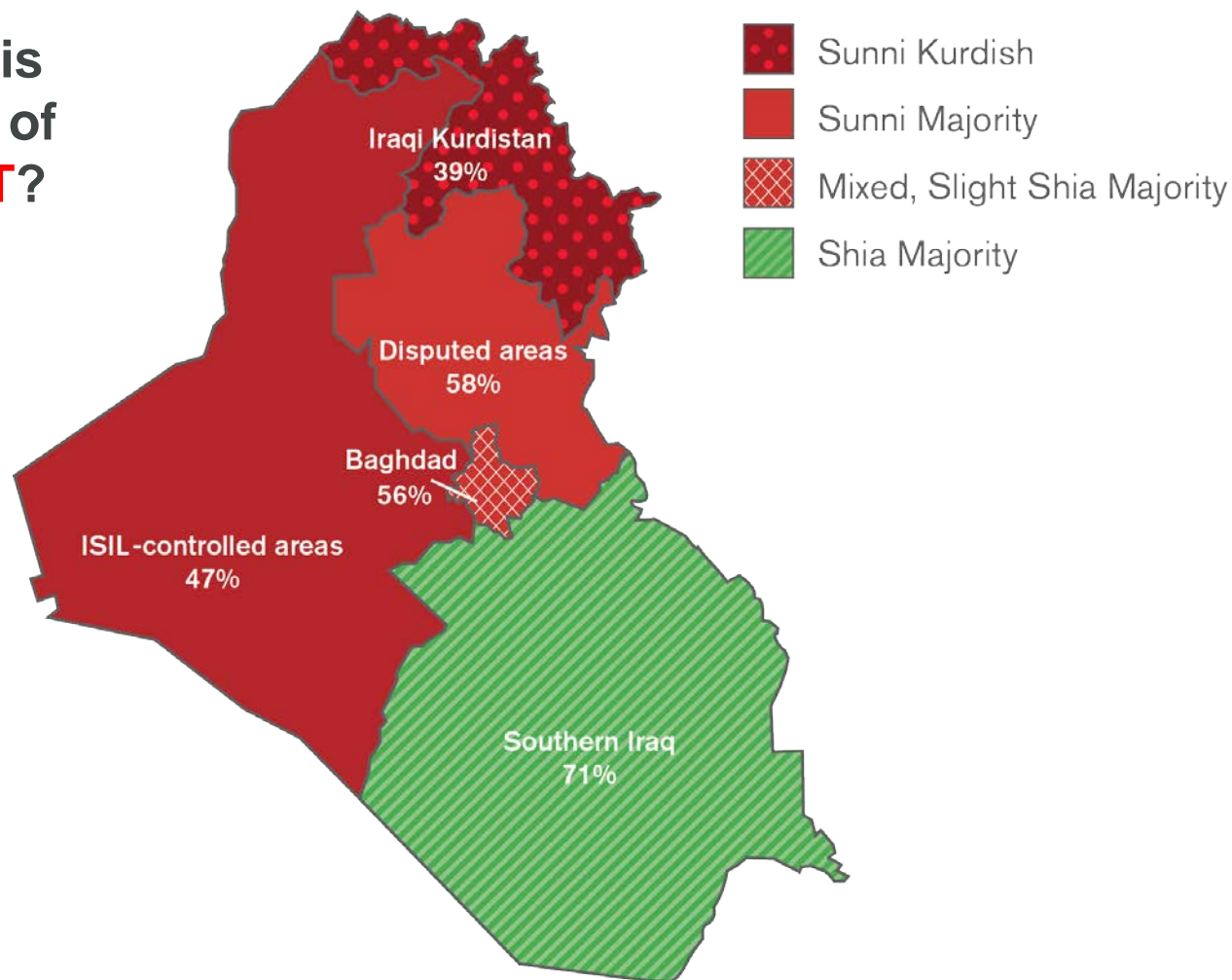
Gallup World Poll Methodology



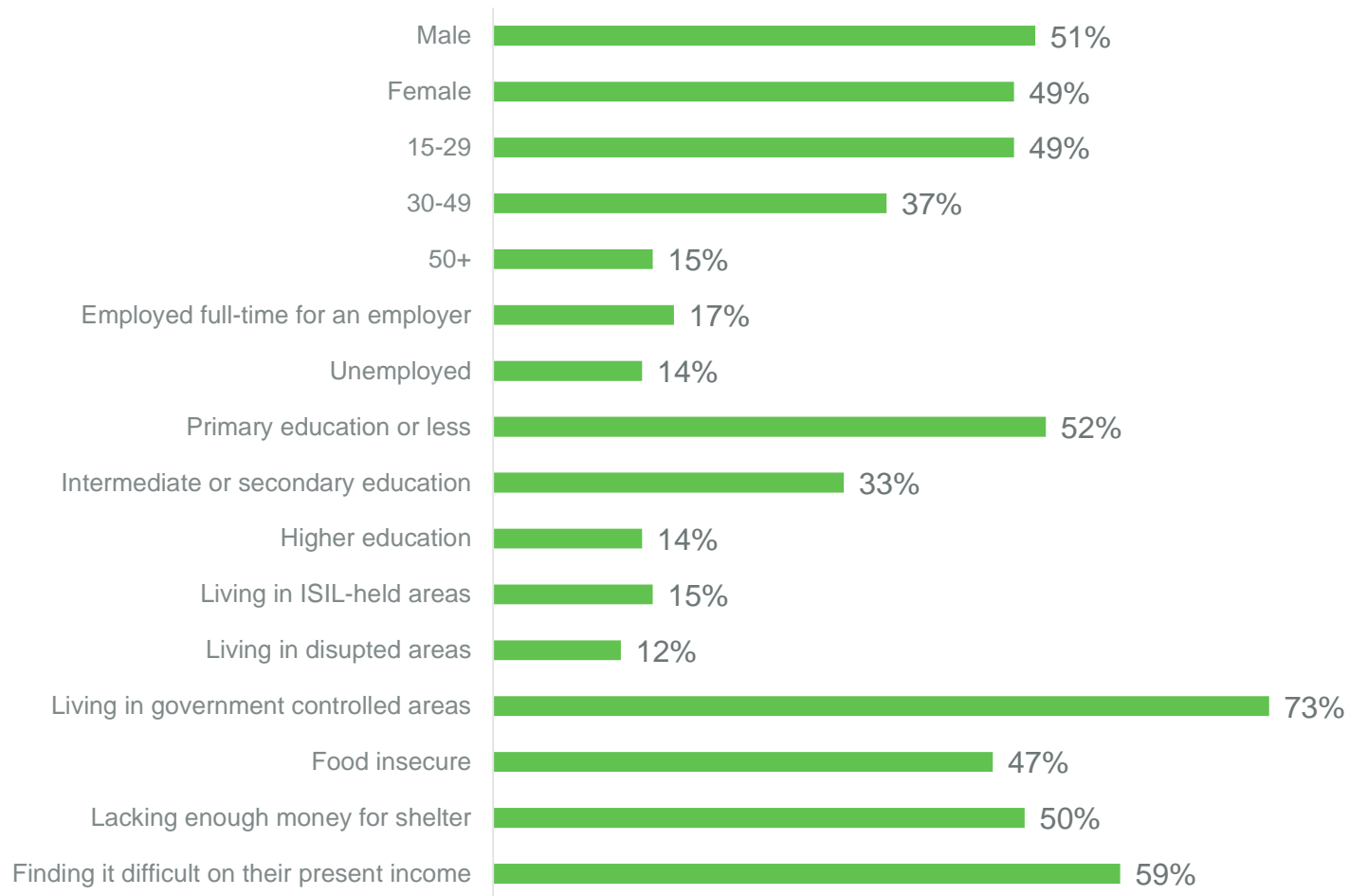
- Three telephone surveys since 2013
- Last survey – December 2014
- Nationally representative of all adults 15 years and older
- Sample size: Approximately 1,000 per survey
- Mode: Telephone (landline+mobile)
- MoE ± 3.8 percentage points

Freedom of Media — December 2014

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



Gallup World Poll in Iraq

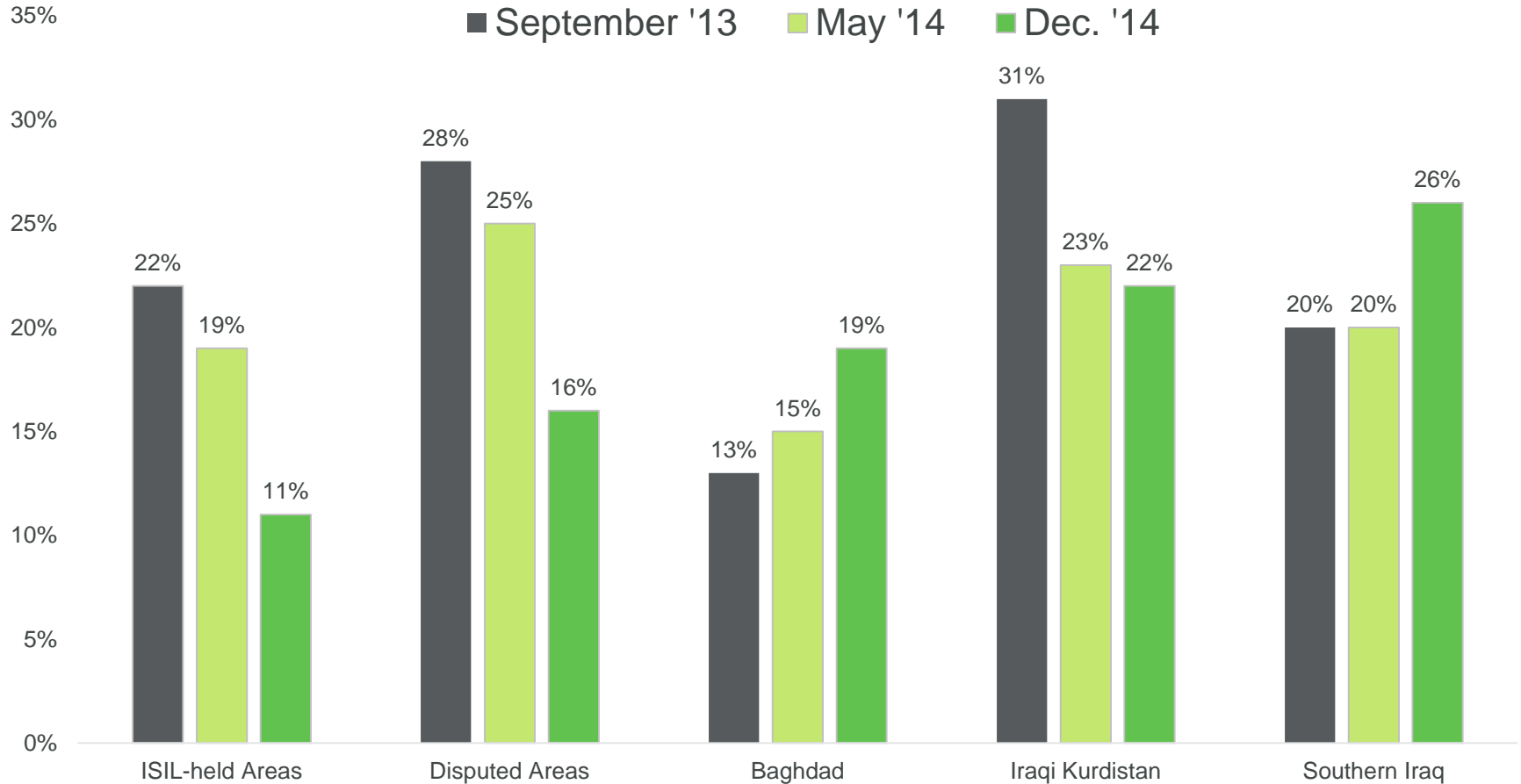


Measuring Life Evaluation

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

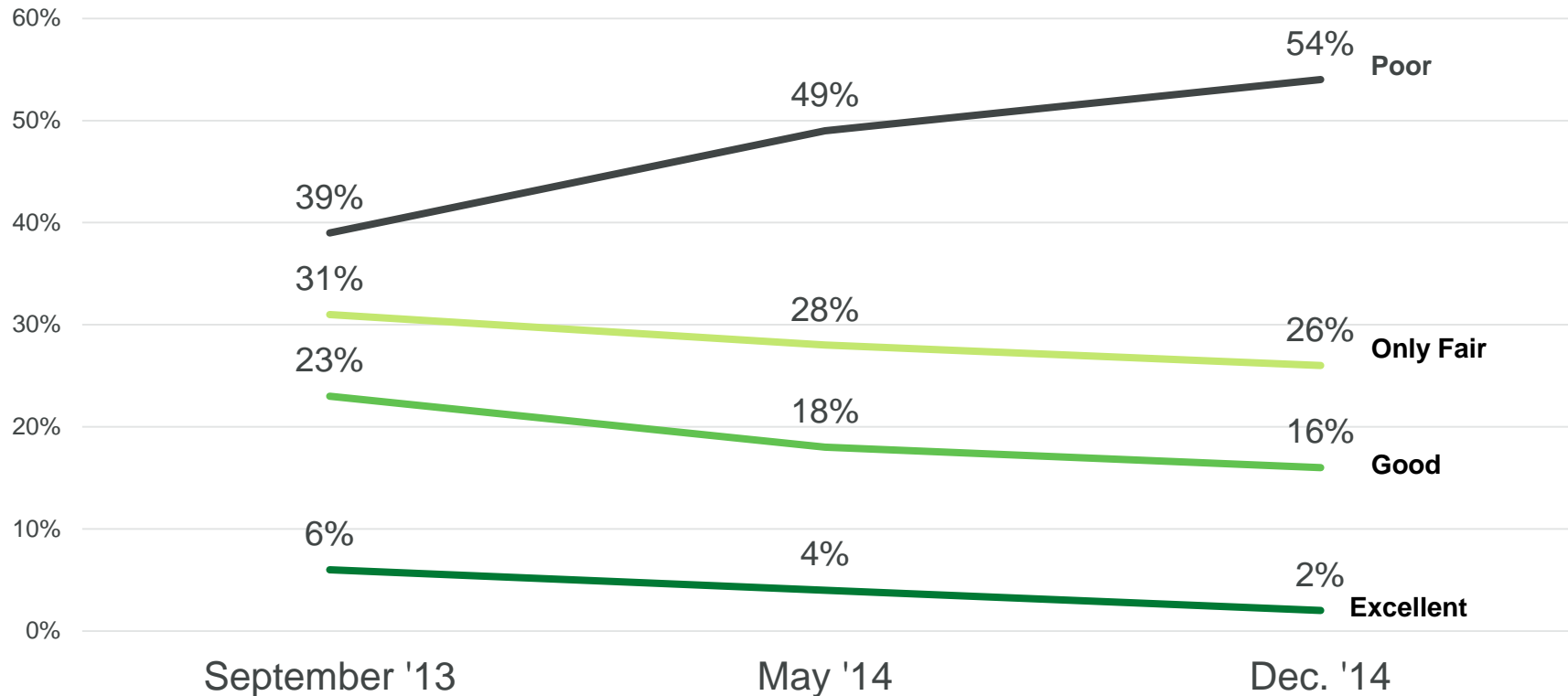
Thriving	Struggling	Suffering
Respondents have positive views of their present life situation (7+) AND a positive view of where their lives will be in five years (8+).	Respondents have moderate to negative views of their present life situation OR moderate to negative views of where their lives will be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



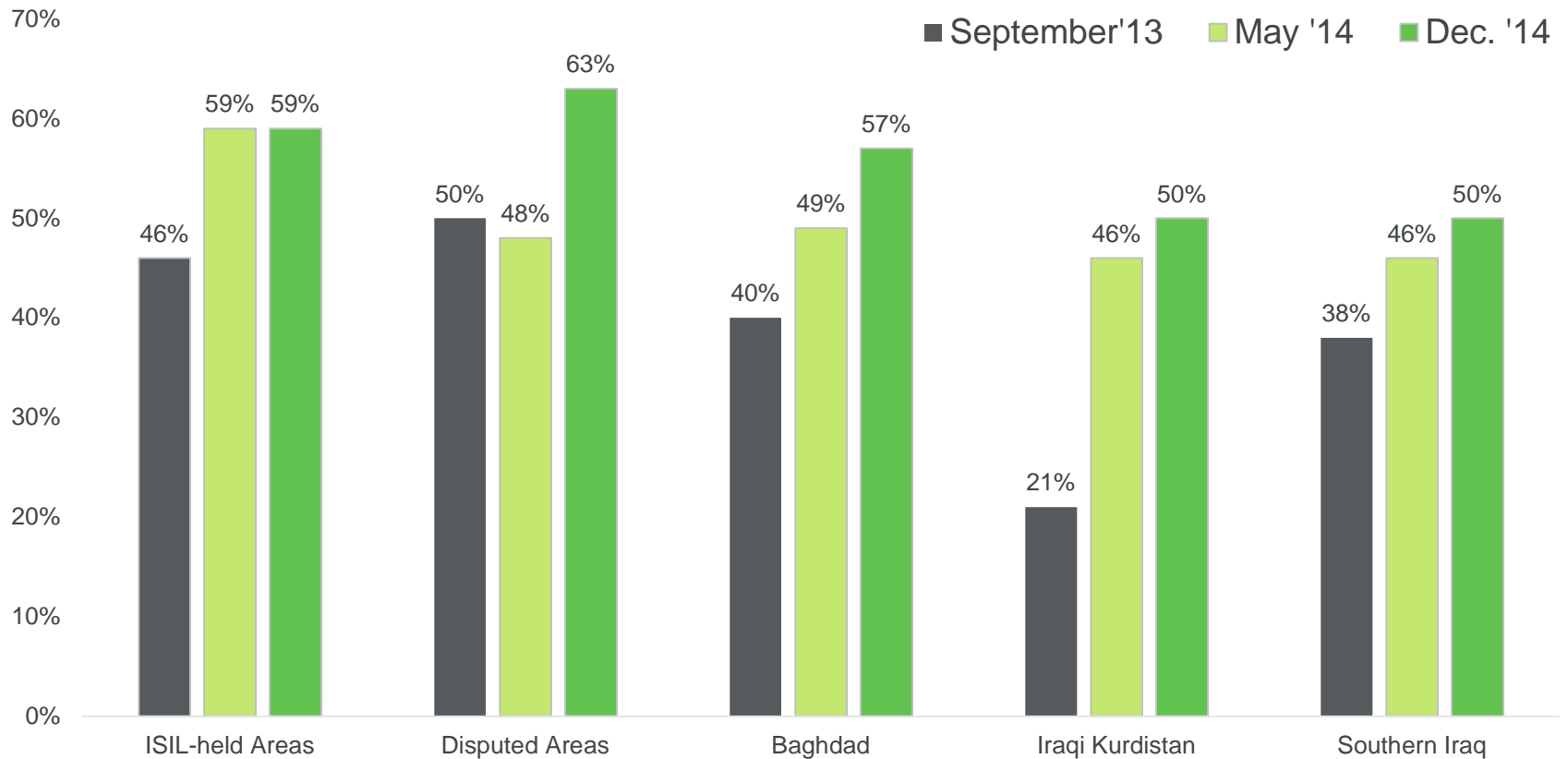
Economic Conditions

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



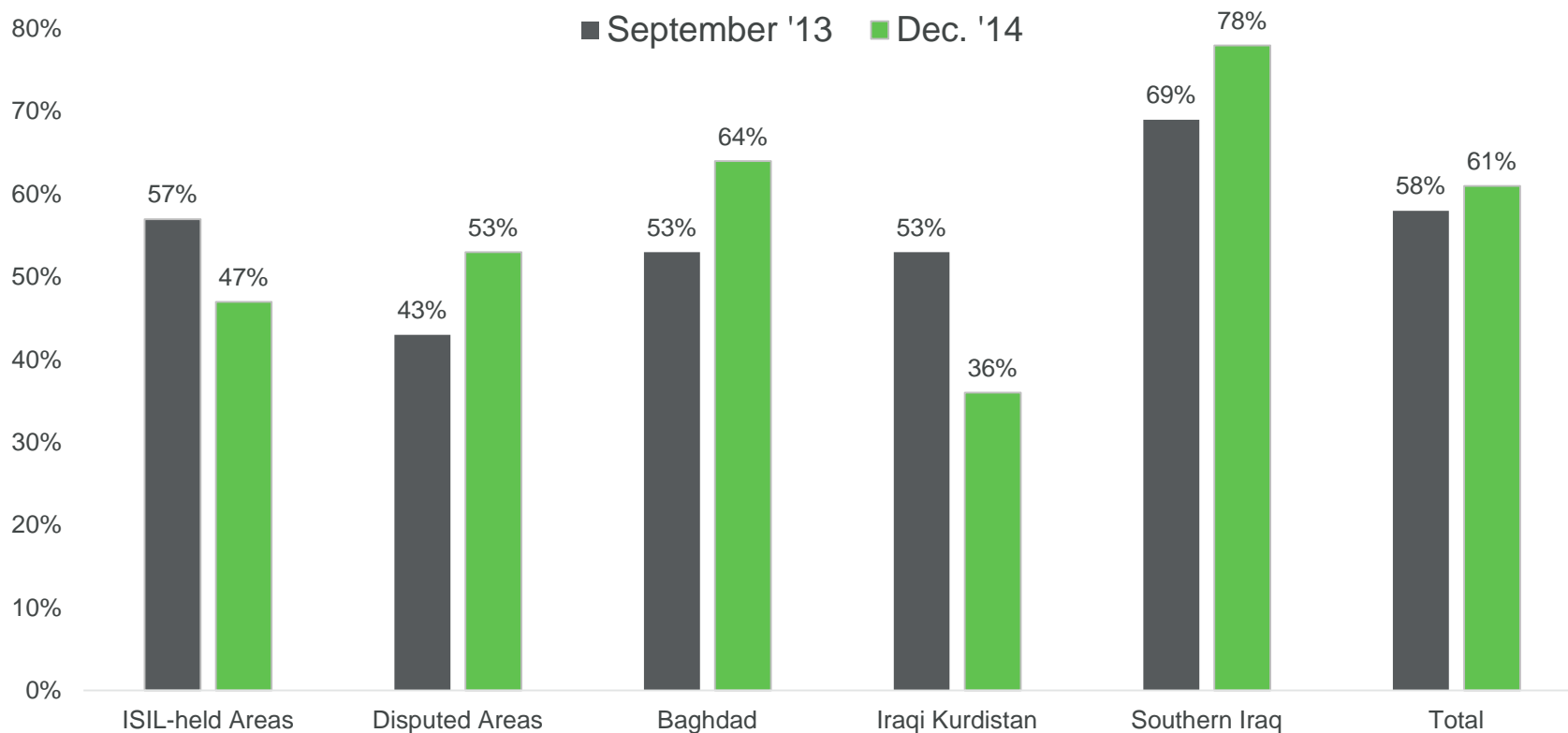
Economic Conditions

% Poor



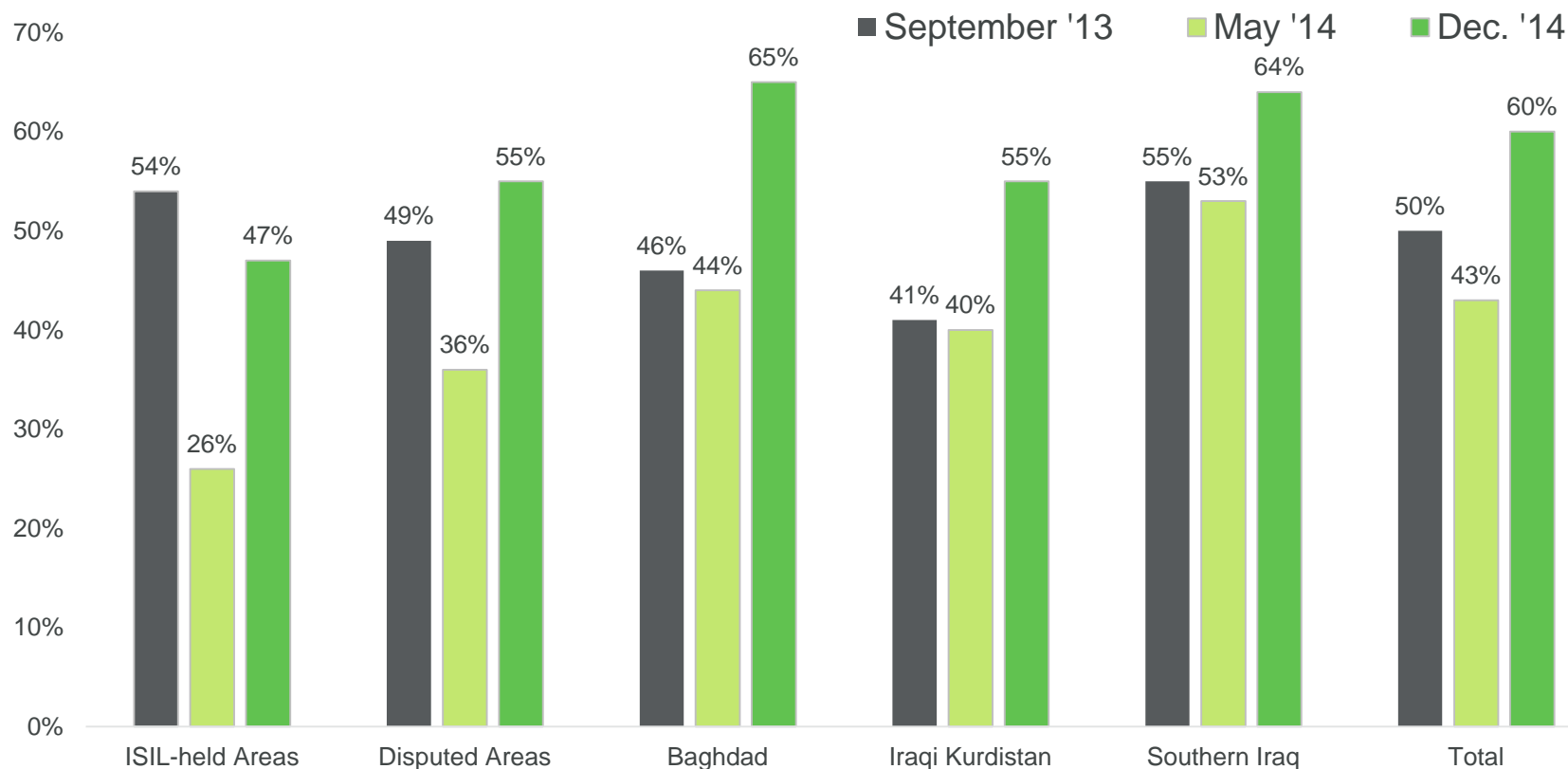
Confidence in Military

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



Confidence in National Government

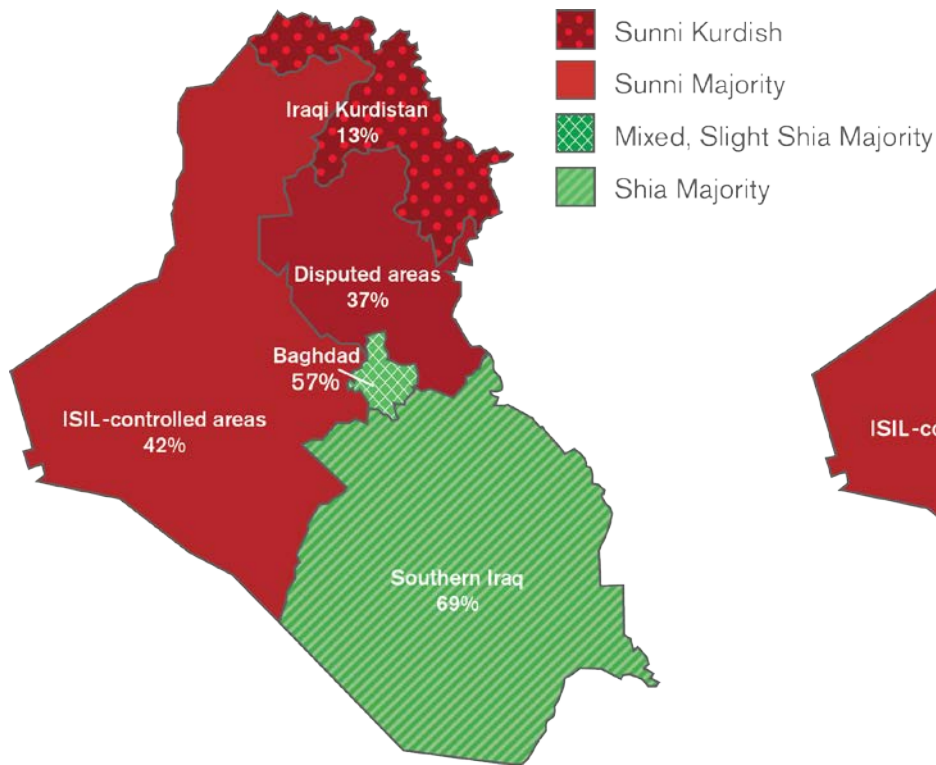
In Iraq, do you have confidence in each of the following, or not? How about the national government?



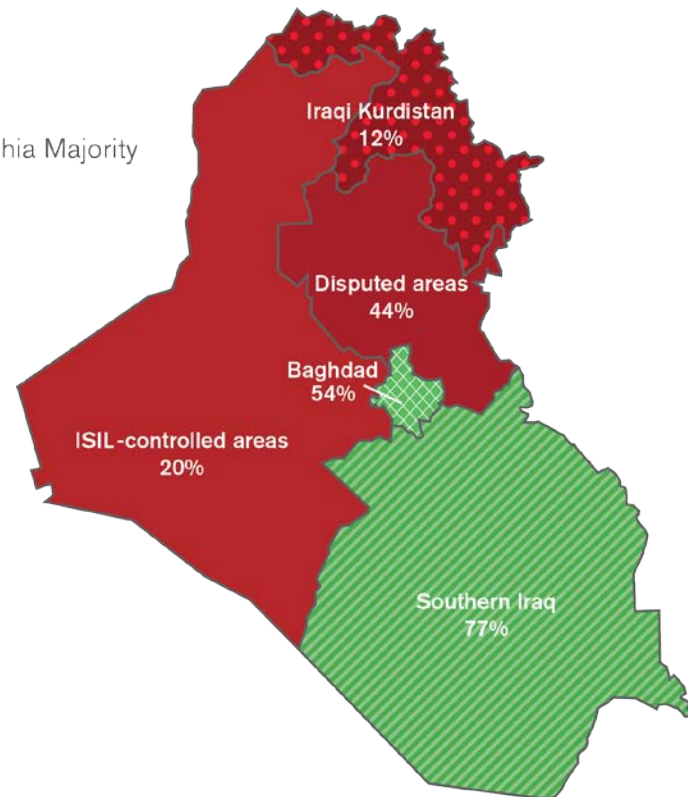
Approval of Iraqi Prime Minister

Do you **APPROVE** or **DISAPPROVE** of the way Nouri al-Maliki is handling his job as prime minister?

September 2013

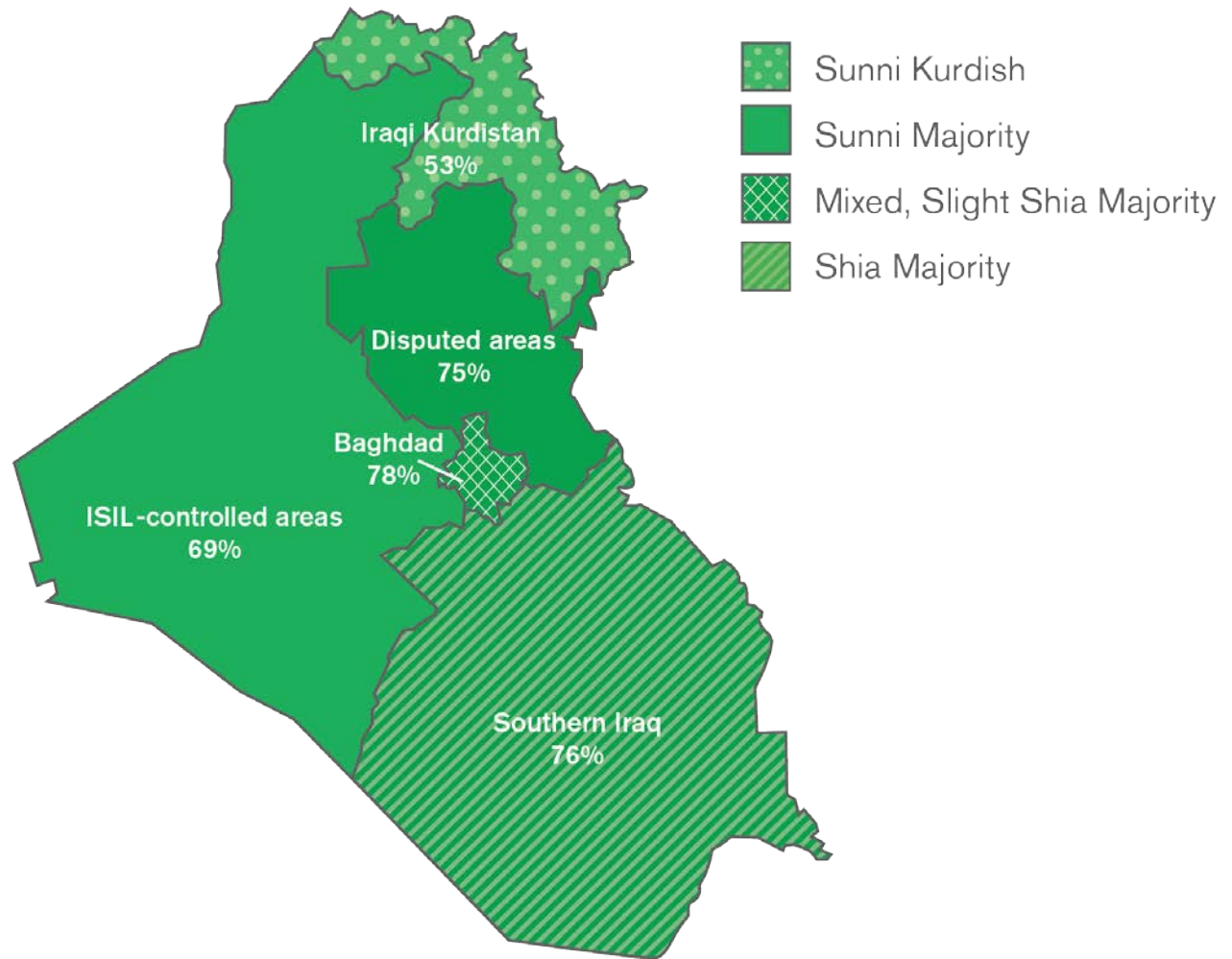


May 2014



Approval of Iraqi Prime Minister – December 2014

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



Key Takeaways

- Regions are divided on political opinions not bread and butter issues; thriving and economic conditions worsened across the board.
- Confidence in the military shows concerning divisions not likely to be smoothed over by current approach for push back on ISIL.
- Despite signs of progress on political reconciliation, current military strategy may only further weaken confidence in military.



Media Use in Iraq and Iraqi Kurdistan Region

Results of 2014 BBG/MBN National Survey of Iraq

Research Methodology

- Computer Assisted Telephone Interviews (CATI)
- Fieldwork October 18—December 2, 2014
- Sample size: 2,015
- Representative of all adults living in Iraq and Iraqi Kurdistan Region (ages 15 and older in 18 governorates)
 - About 20 million people

Survey Timing

- Fieldwork October 18–December 2, 2014
 - **Fighting throughout the country:**
 - Especially Ninevah and Anbar; ISIL gained control of Mosul and Fallujah and advanced close to Baghdad
 - U.S. began airstrikes in August 2014
 - Peshmerga holding off ISIL advance to Erbil
 - **Media entrenched in political conflict:**
 - August 2014 – ISIL anti-U.S. Twitter campaign
 - July 2014 – Government shuts down digital media for several weeks; issues guidelines requiring media to only report favorably on government.
 - TV stations take sides – Al Iraqiya (Shia leaning); Sharqiya (Sunni leaning)
 - August 2014 – Journalist conference criticizes all media for “failing to provide unbiased and professional coverage of the brutal conflict.”

Media Access and Use for News

TV is the only true “mass” media

Percentage of respondents with **home** access to... (n=2,015)



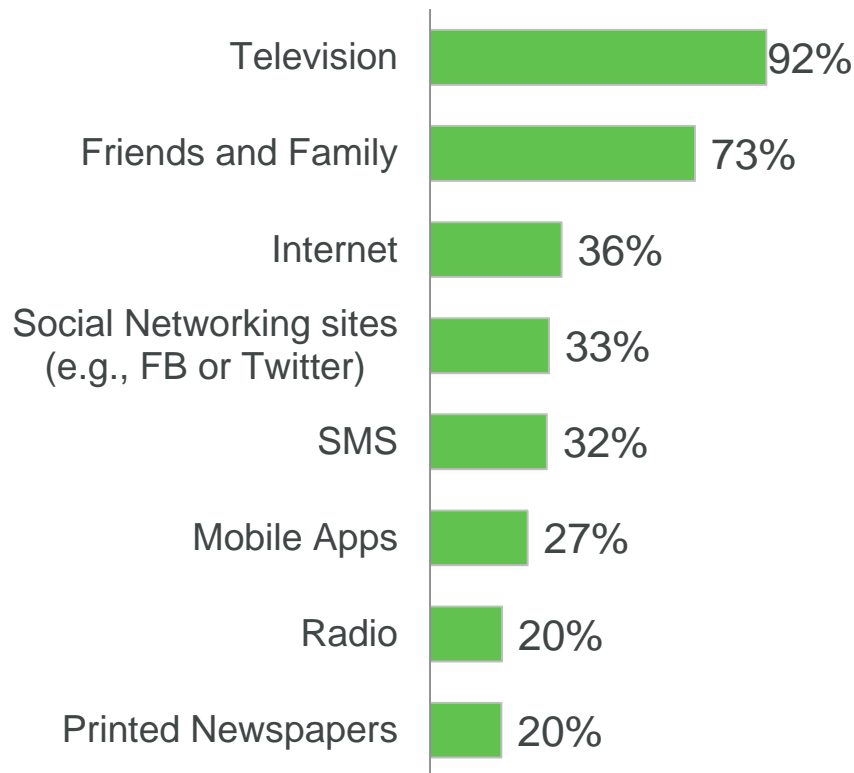
Use

- ▶ 95% have **watched** TV in the past week
- ▶ 40% have **used** the Internet in the past week
- ▶ 52% have never **used** the Internet



TV is by far the most popular source of news, even among youth...

For each one of the sources I mention, please tell me whether you use it at least weekly for news. (n=2,015)

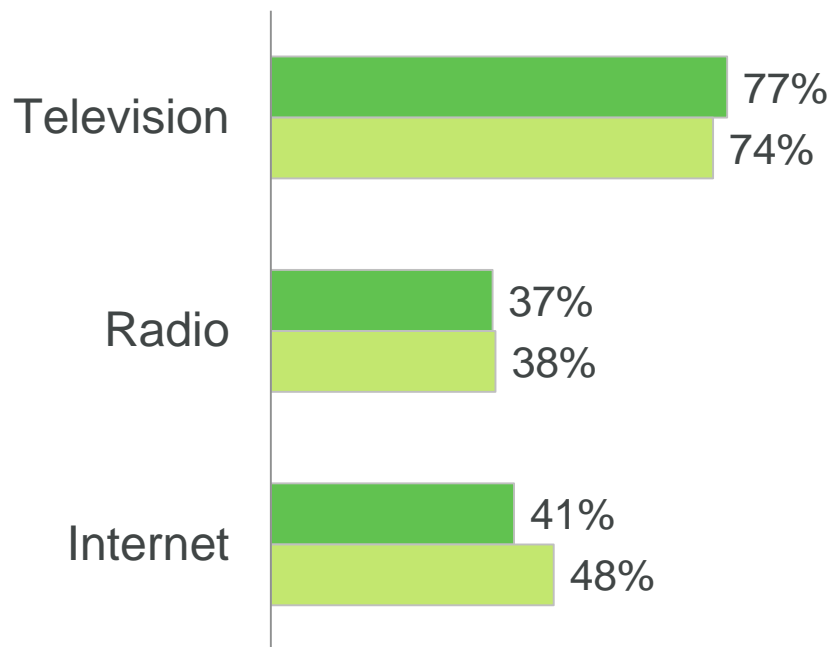


- Television by far the most popular news source among **15-34** year olds.

...and significantly more respondents trust television than the Internet.

Please tell me how much you trust the news and information from each of the following media.
(% strongly or somewhat)

- All respondents (n=2,015)
- 15-34 year olds (n=1,222)



Internet use is up and its use for news among Internet users is robust.

- In 2012, BBG survey showed 18% used the Internet in past week.
- In 2014, BBG survey showed 40% used the Internet in the past week.

% of past week Internet users who used Internet in past week to...

	All past week Internet users (n=812)
Find Latest News	63%
Watch Online Video	74%
Listen to Online Audio	58%



The Internet is almost as popular as TV for news among past week Internet users.

Among past week Internet users (n=812):

- **82%** used Internet in past week for news (*36% nationally*)



66%
Social media networks

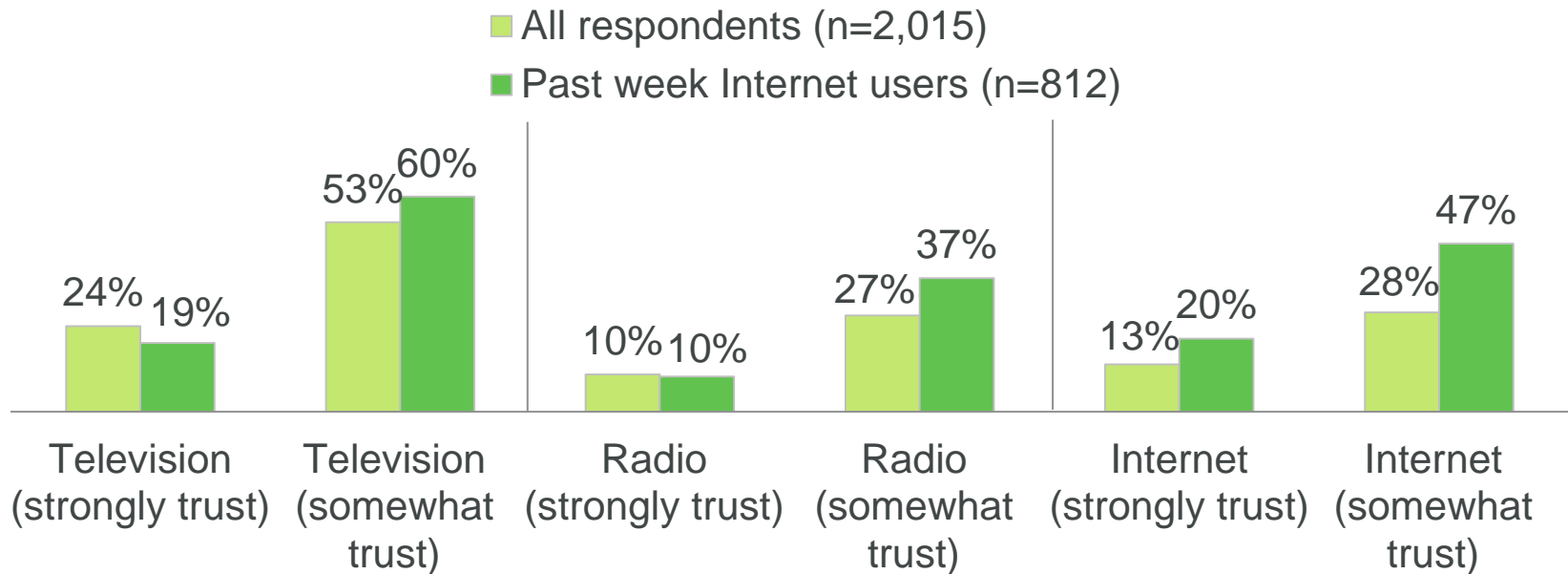
44%
Mobile apps

38%
SMS



More past week Internet users than respondents overall trust the Internet.

Please tell me how much you trust the news and information from each of the following media sources.



- **67%** of past week Internet users trust the Internet versus **41%** of all respondents

Many are using mobile phones in ways they can get news.



- **92%** have a mobile phone
- **6%** have access to a mobile phone of someone close

% with access to mobile phone who used it in the past seven days to... (n=1,985)

Listen to audio	29%
Download or use mobile app	26%
Listen to radio	16%
Access social network site (Facebook, YouTube, Twitter, etc.)	30%
Access Internet	35%
Download and view video	28%

Drilling Deeper: Media use patterns differ significantly by target group

The Focus: Young males (ages 15-34) in Anbar and Ninevah (n=213)

Poorly educated and struggling economically

- 73% intermediate education or less (versus 59% of all respondents)
- 84% finding it difficult or very difficult on current income (56% of all respondents)
- 59% displaced (27% of all respondents)

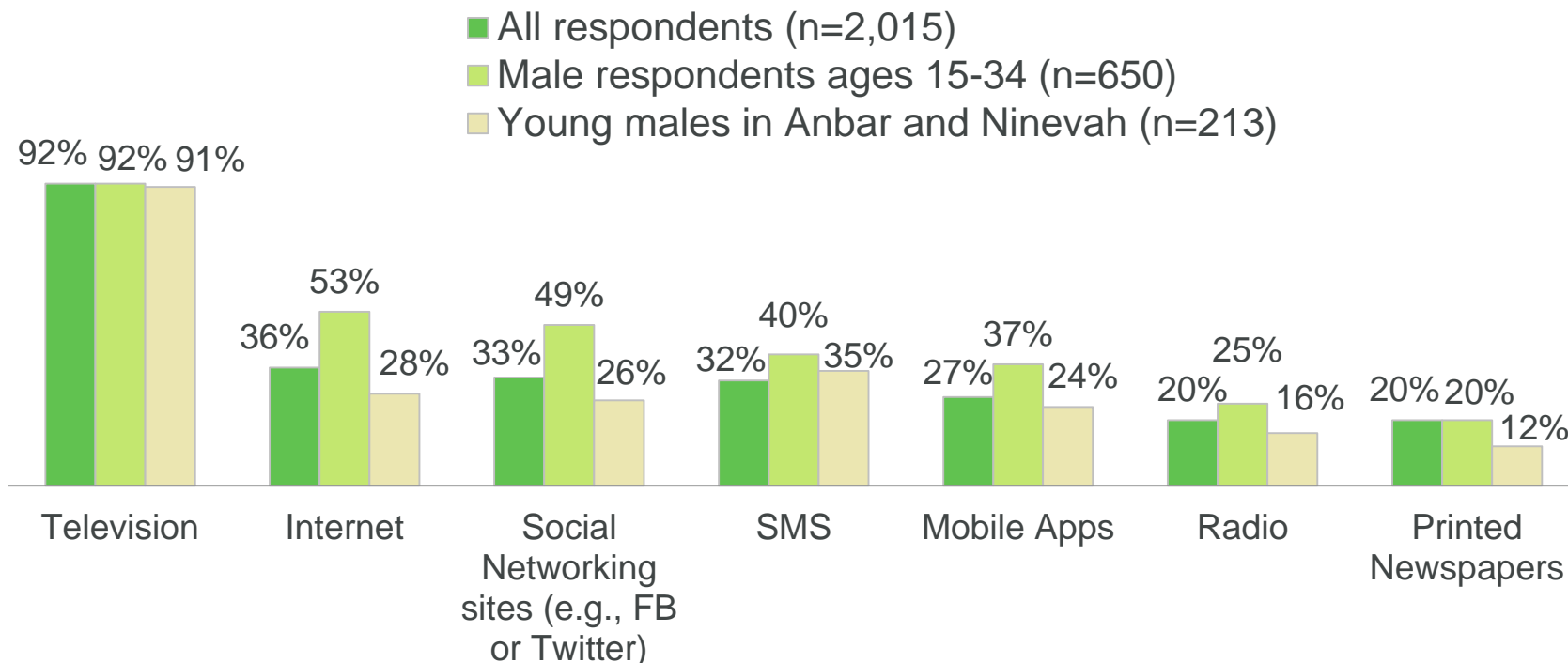
Use of Internet lower than for respondents overall

- 28% use Internet past week for news (36% all respondents)
- 36% have home Internet access (50% all respondents)
- 54% have never use the Internet



Television predominates in Anbar and Ninevah

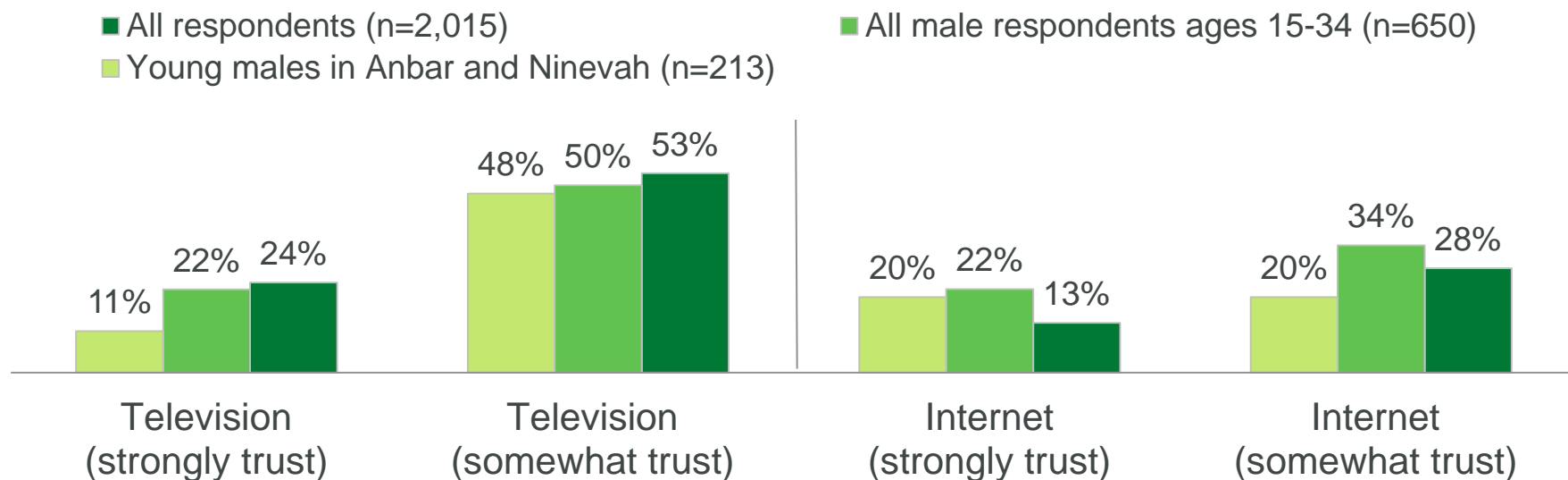
Past week use for news



- Young males in Anbar and Ninevah are using digital media significantly less than male respondents overall *and* male respondents ages 24-35 nationally.

Though TV is important for news, few young males in Anbar and Ninevah strongly trust it.

Please tell me how much you trust the news from each of the following



- Significantly less likely than all respondents *and* males ages **15-34** nationally trust television
- 28% of past week Internet users in Anbar and Ninevah (ages 15-34) strongly trust Internet and 37% somewhat trust Internet (n=60)

Drilling Deeper: “Information Hubs” in Baghdad

The Focus: Baghdad residents who collect news at least 2-3 times/day and share it at least daily (n=172)

Better educated older males

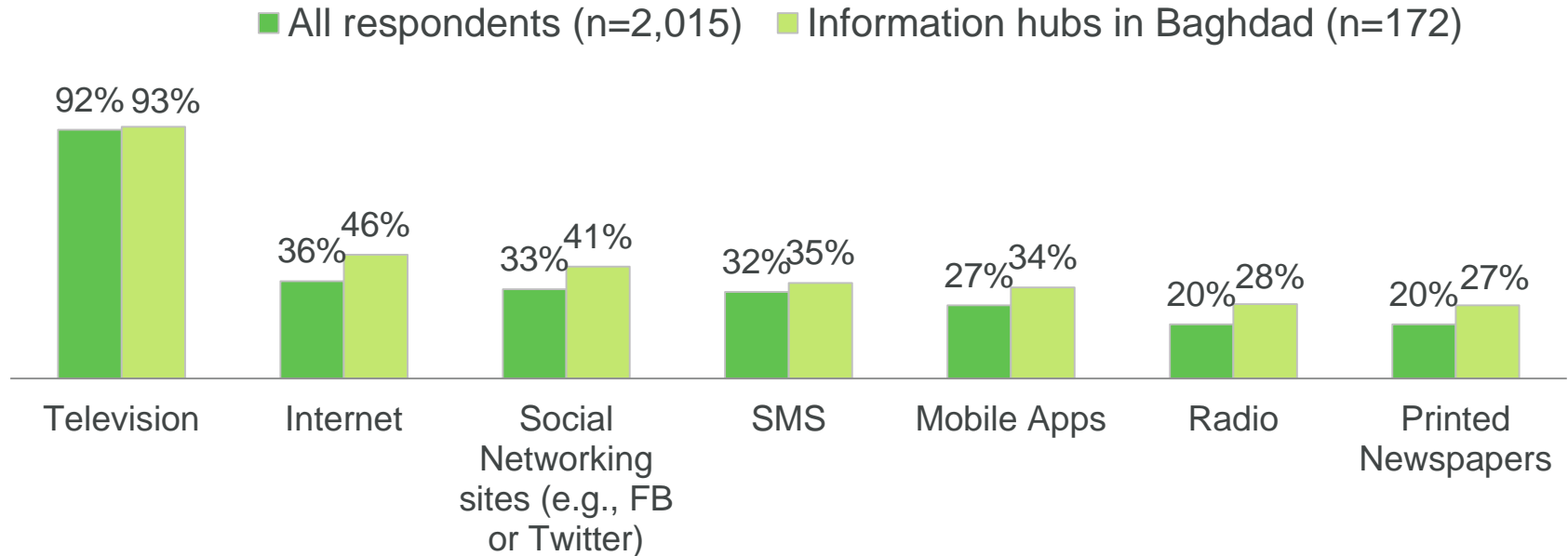
- 24% at least some college (16% all respondents)
- 46% under age 34 (61% nationally)
- 56% male (52% nationally)
- 56% find it difficult or very difficult on current income (versus 56% nationally)

Much more likely than average respondent to use digital media for news



Using all media for news more than most respondents.

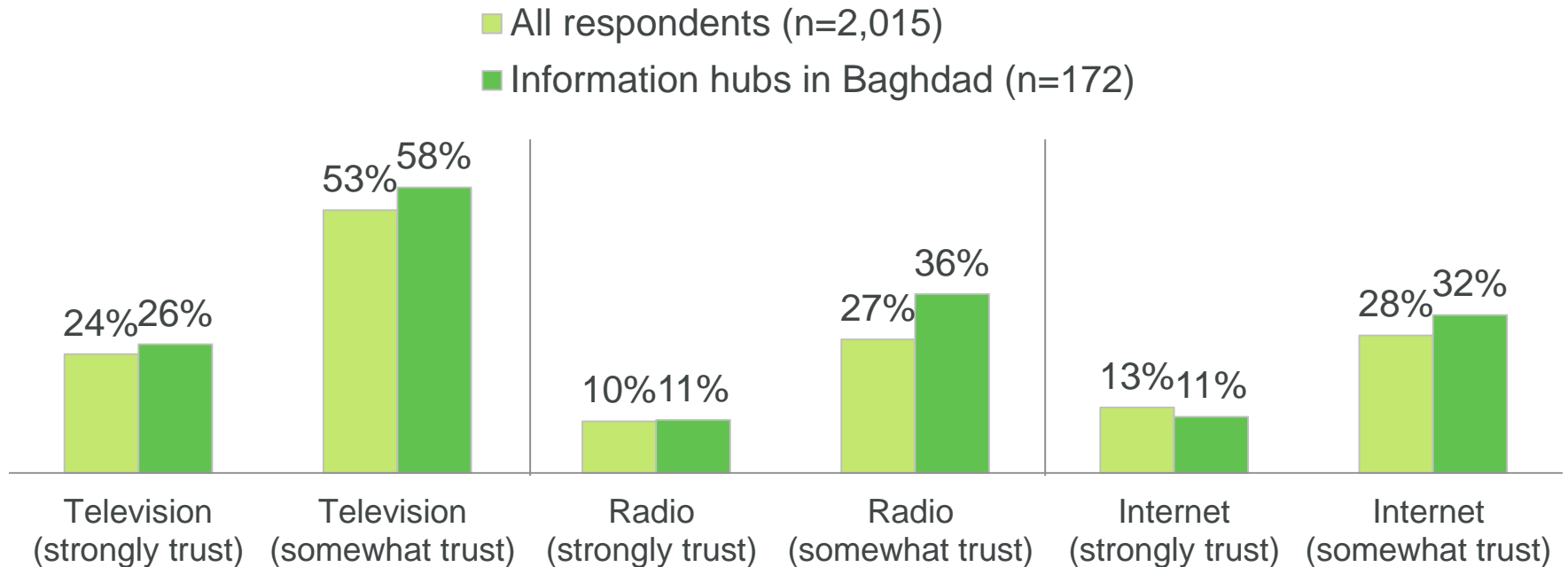
Past week use for news



- Significantly larger percentages of information hubs than respondents overall are using all media for news.

Significantly more trust TV than any other media platform.

Please tell me how much you trust the news and information from each of the following media sources.



- More than nationally trust TV and radio

Key Takeaways

- Iraq is divided and in transition.
- You cannot have an actionable understanding of media habits without analyzing specific “target” audiences.
- All media platforms matter, depending on the audience.



GALLUP®



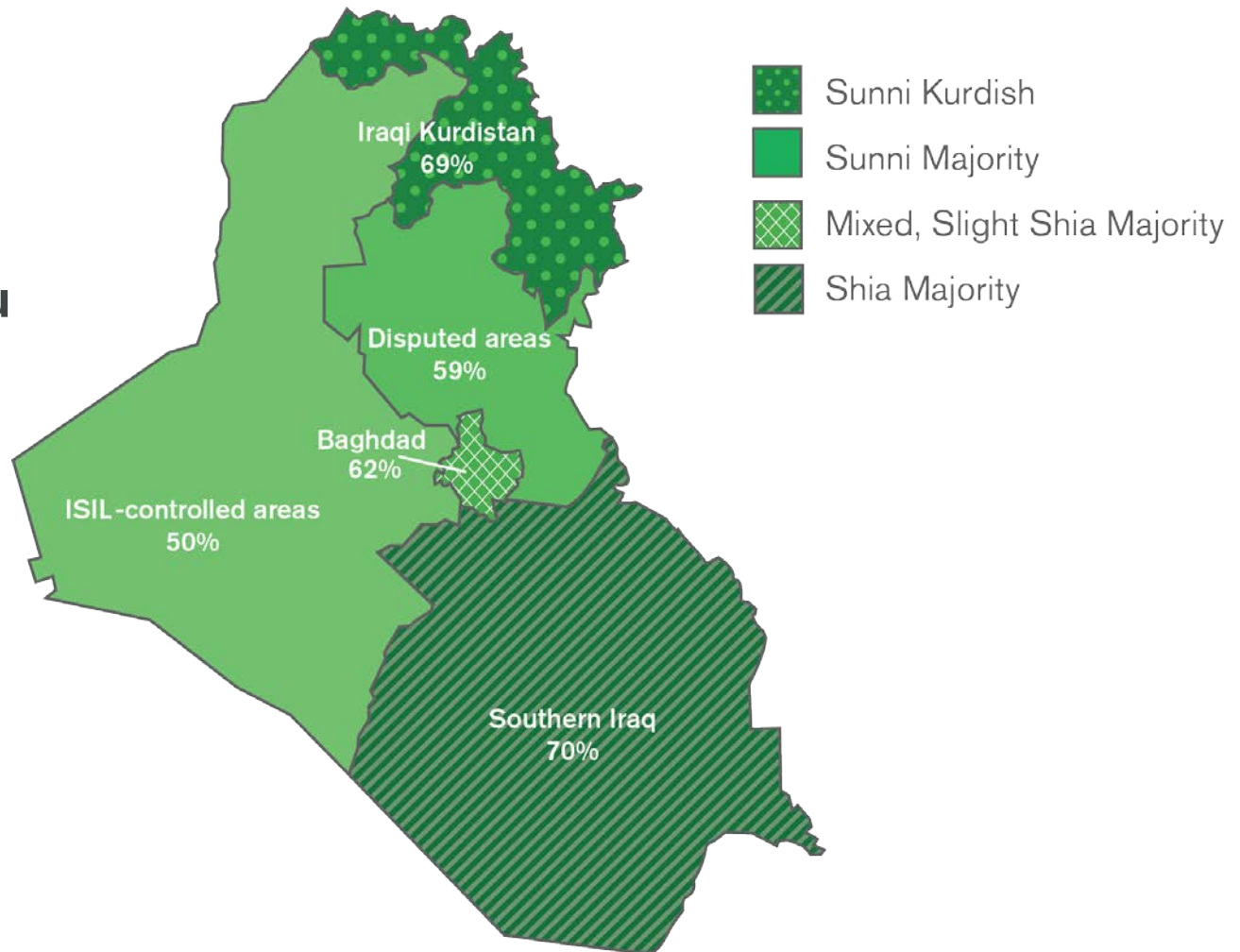
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Have a question? Contact us at 202-203-4400 or publicaffairs@bbg.gov

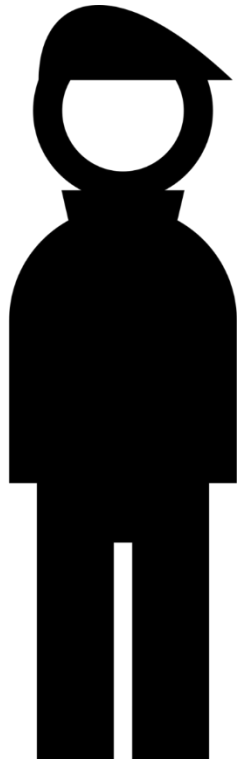
APPENDIX

Freedom in Your Life – December 2014

In Iraq, are you
SATISFIED or
DISSATISFIED
with your freedom
to choose what you
do with your life?



The 40% of respondents who used the Internet in the past week is a niche audience...



Young: 61% of 15-34 year olds

Male: 52% male

Location: 70% live in government-controlled area

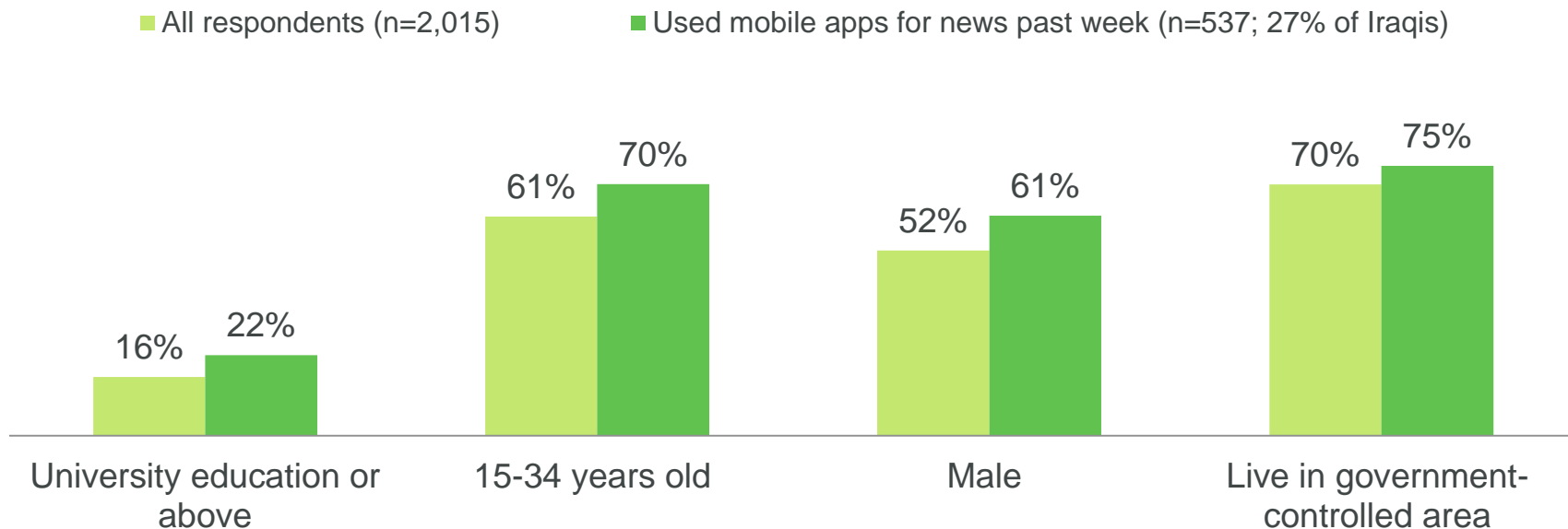
Educated: 59% of those with intermediate/higher education
16% with university or higher education

Economically stable: 56% find it difficult on present income

Percentage of each group using Internet for any purpose in past week

...as are those who use mobile apps

Profile of those respondents using social networks and mobile apps for news



Many youth and university educated are using mobile phones in ways they can get news.

% with access to mobile phone who used it in past seven days to...

	All with access to a mobile phone (n=1,985)	At least university education with access to mobile phone (n=325)	15-34 year olds with access to mobile phone (n=1,212)
Listen to audio	29%	48 %	35%
Download or use mobile app	26%	46 %	32%
Listen to radio	16%	16%	18%
Access social network site (Facebook, Youtube, Twitter)	30%	61%	36%
Access Internet	35%	65%	42%
Download and view video	28%	48%	35%

The percentage of mobile owners using their mobile devices for news less than nationally.

% with access to mobile phone who used it in past seven days to...

	Young males in Anbar and Ninevah with access to mobile phone (n=213)	15-34 year olds with access to mobile phone (n=1,212)	All with access to mobile phone (n=1,985)
Listen to audio	24%	35%	29%
Download or use mobile app	16%	32%	26%
Listen to radio	17%	18%	16%
Access social network site (Facebook, Youtube, Twitter)	27%	36%	30%
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