



International Broadcasting in Iraq

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This research has been carried out in conformity with the standards of the ICC/ESOMAR International Code on Market and Social Research.* A summary of the methodology and conduct of the research is contained in this report. InterMedia is not responsible for any use of these data that does not conform to the ICC/ESOMAR standards. *<http://www.esomar.org/index.php/codes-guidelines.html>



Summary: International broadcasters flourish amid rise of domestic media outlets in Iraq

- In 2007, domestic, pan-Arab and international broadcasters vied for audiences in an Iraq plagued by civil war and an insurgency against U.S.-led coalition forces. Iraqis are deeply worried about their security, their economy and the impact of the continued U.S. presence in their country. Media outlets, both domestic and international, face the challenge of providing Iraqis breaking news and in-depth analyses about the ongoing crisis.

- U.S. international broadcasters Radio Sawa and Radio Free Iraq (RFI) offer two distinct products to Iraqi listeners. The Radio Sawa formula—a mix of news and music—appeals to more listeners than does RFI, which focuses on hard news. RFI’s listeners make a concerted effort to tune to the news every night; Radio Sawa audiences tend to listen throughout the day for the news when it airs 15 and 45 minutes past the hour, as well as to other programs examining Iraqi issues.

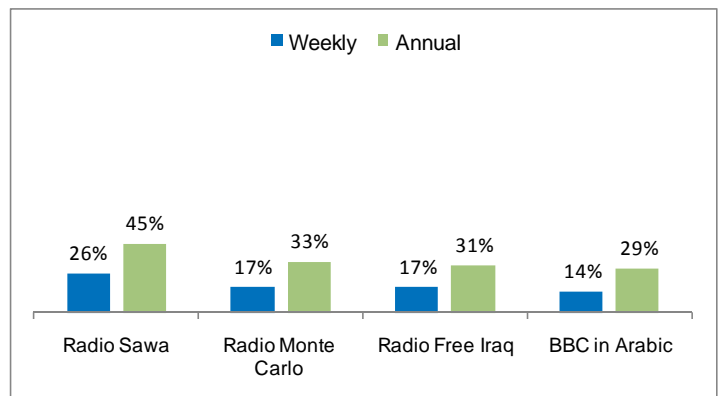
- Although it still leads among both local and international broadcasters, Radio Sawa reaches 25.6 percent weekly, a drop from 51.4 percent in 2005. RFI’s weekly reach was 16.6 percent in 2007, only 5 percentage points down from 2005.



Obstacles and Opportunities for International Broadcasters in Iraq

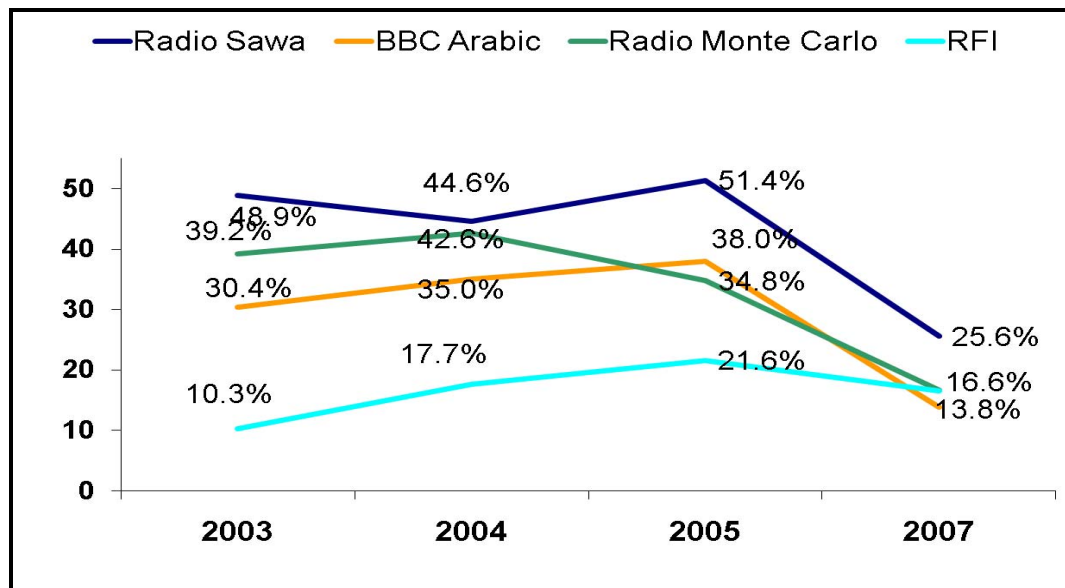
- Since 2005, listening has dropped by more than half for many international broadcasters as consumers look to domestic sources for their news and information.
- Despite this drop, Radio Sawa is still the most popular broadcaster among Iraqis, who also named the station as their most important source of news and information.
- RFI is popular among listeners seeking political news and other information content; Iraqis named RFI their third-most important news source, despite its limited broadcast times.
- Alhurra Iraq leads Al Jazeera in weekly viewing, yet falls behind Al Arabiya and local leaders Al Iraqia and Al Sharqiya.

International Radio Broadcasting in Iraq
Weekly and Annual Reach Among General Population



Source: InterMedia survey of adults (15+) in Iraq n=2,000

International Broadcasting in Iraq Weekly Listening Trends



InterMedia Survey of Adults (15+) in Iraq: Base: n=1,000 in 2003,
n=2,500 in 2004, n=2,000 in 2005, n=2,000 in 2007

- In addition to U.S. international broadcasters, BBC's Arabic Service and Paris-based Radio Monte Carlo also target Iraq. BBC's weekly audience has dropped to 13.8 percent in 2007 from 38 percent in 2005, losing close to two-thirds of its listeners. Radio Monte Carlo lost just over half its listeners in the last two years, falling from 34.8 percent weekly reach in 2005 to 16.6 percent in 2007.
- At 98 percent, television ownership is nearly universal in Iraq. Satellite dish ownership is also high at 92 percent. Ninety percent of Iraqis watch TV daily. High television and satellite dish ownership bode well for Alhurra and pan-Arab channels competing for audience share in Iraq, and with the post-Saddam liberalization of media, Iraqis are free to choose from among proliferating news and entertainment outlets.
- Eighty-eight percent of Iraqis report owning a radio. Although radio ownership is only 10 percentage points behind TV, the difference between daily listening and viewing is sharp—21 percent versus 90 percent. MW/AM is the most available waveband with 74 percent saying they have access. Shortwave is second with 64 percent, and Eastern and Western FM tie with 55 percent and 54 percent, respectively. Despite greater access to MW/AM, most "yesterday" listeners tune to radio through the FM frequency.
- Iraqis were markedly more negative in their attitudes toward the United States in 2007 than in 2005; a significant majority of Iraqis, 63 percent, said they are very or somewhat unfavorably inclined toward the United States, up 20 percentage points from 2005. Although 32 percent of respondents were ambivalent in 2005, that figure dropped in 2007 to only 13 percent. Those Iraqis who held a "wait and see" attitude toward the U.S. presence in Iraq in 2005 have taken a decidedly negative turn. Increased anti-American sentiments arguably reflect the U.S. failure to fill the security vacuum after toppling Saddam Hussein, to curb sectarian violence, restore basic services and ultimately gain the Iraqi people's trust.

INTERNET: PENETRATION AND USE STABLE

- Internet use in Iraq is down slightly from 2005, due in part to the slow progress in repairing the telecommunications infrastructure in the midst of increased violence. In 2007, 15 percent of Iraqis accessed the internet weekly, and 4 percent reported logging on “yesterday.”

Only 7 percent of Iraqis enjoy home access to internet, whereas 18 percent go online at one of the many internet cafes throughout the country.

- Thirty percent of Iraqis own personal computers, but only about 33 percent of weekly internet users accessed the internet from home in the last four weeks. Sixty-six percent of weekly internet users go online at internet cafes.

Most weekly internet users, 79 percent, participate in newsgroups, bulletin boards or chat rooms when they go online, up from 53 percent in 2005.

- Weekly users also access the internet at work and school, although in much smaller numbers. Only 19 percent said they go online at work, 9 percent at school, college or university and 22 percent elsewhere. Overall, only 7 percent of Iraqis enjoy home access to internet, whereas 18 percent go online at one of the many internet cafes throughout the country.
- The great majority of weekly users are young, educated males. Seventy percent are 15-34, with about 40 percent of these young users under 24. A slight majority, 51 percent, have a college education, and another 29 percent at least a secondary education.

- Approximately 74 percent of weekly internet users are male. Females are at a disadvantage when it comes to logging on, especially with the low percentage of home internet access. Arguably, males are more likely to venture out to internet cafes, particularly in the evenings after work or school, whereas females are less likely to go out due to cultural constraints and security fears. With Islamists seeking to change women’s roles in society, they face even tighter restrictions in their daily lives than under Saddam Hussein’s brutal, yet secular dictatorship.

- Most weekly internet users, 79 percent, participate in newsgroups, bulletin boards or chat rooms when they go online, up from 53 percent in 2005. Interactive websites allow Iraqis to read and contribute to discussions about the situation in their country as well as other topics of interest. Specialized newsgroups and message boards cater to participants with similar ideologies or interests, although some sites encourage constructive debates between those with opposing views. Sometimes these debates escalate to an online war of words reflecting hostilities between Iraqis on the ground.

The Iraqi blogosphere has blossomed in the past five years, with hundreds posting regular entries about the situation in Iraq, expressing their opinions on the U.S.-led presence and ongoing civil strife.

- Three out of four weekly internet users go online to send and receive email, 65 percent to learn about a specific topic and 60 percent to find out about the latest news. A further 52 percent log on to read blogs. Websites listing Iraqi bloggers include Iraq Blog Count (iraqblogcount.blogspot.com), Global Voices (www.globalvoicesonline.org) and Iraqi Bloggers Central (jarrarsupariver.blogspot.com).

- The Iraqi blogosphere has blossomed in the past five years, with hundreds posting regular entries about the situation in Iraq, expressing their opinions on the U.S.-led presence and ongoing civil strife. One notable blog discussion in fall 2006 focused on medical journal, *The Lancet*, which put the number of “excess Iraqi deaths” since 2003 at

100,000 or more. The report also assessed the increased risk of death to Iraqi civilians from any cause, but mainly violence, as 2.5 times higher than the year before the U.S.-led invasion.¹ Many bloggers joined the discussions, posting in both English and Arabic, alternately criticizing Coalition forces for endangering Iraqi civilians and *The Lancet* for estimating these deaths too conservatively.

- Fifty-four percent of Iraqis who go online every week enjoy playing games, 46 percent log on to download music, 27 percent to watch videos and 12 percent to listen to radio. Internet use for radio listening has stayed largely the same since 2005, but use for downloading music has increased almost two-fold from 2005. An overwhelming majority of weekly internet users, 90 percent, access information online in Arabic; only 43 percent do so in English.
- The most popular internet site among weekly users is the search portal, Google, with 68 percent saying they visited it in the past month. Yahoo! is the second-most frequented site with 64 percent, and Hotmail comes in third at 31 percent. Arabic news sites follow the prevalent mail and search engines in popularity. In a statistical tie are the websites for RFE/RL in Arabic² and Al Jazeera, visited by roughly 21 percent of weekly users in the past month, and for Al Arabiya at 20 percent. Some 15 percent of weekly users visited Radio Sawa's website in the past month, 10 percent Alhurra's website and 8 percent BBC Arabic's website.

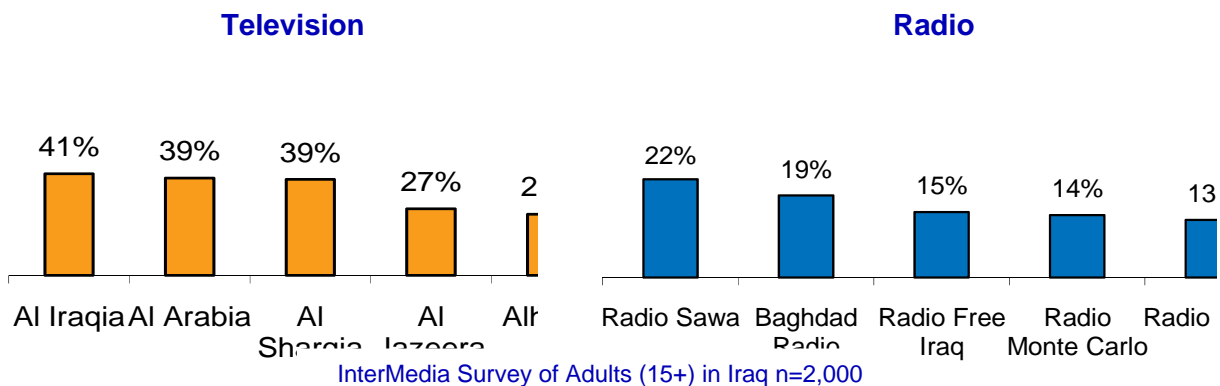
¹ Iraq death toll 'soared post-war' 10/29/2004 BBC NEWS: http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/middle_east/3962969.stm

² RFE/RL's website gives visitors the option of viewing the news by country or by language. The Arabic language page automatically routes the visitor to the Radio Free Iraq website (<http://www.iraqhurr.org/>).

MEDIA USE: BOTH DOMESTIC AND INTERNATIONAL CHANNELS IMPORTANT NEWS SOURCES FOR IRAQIS

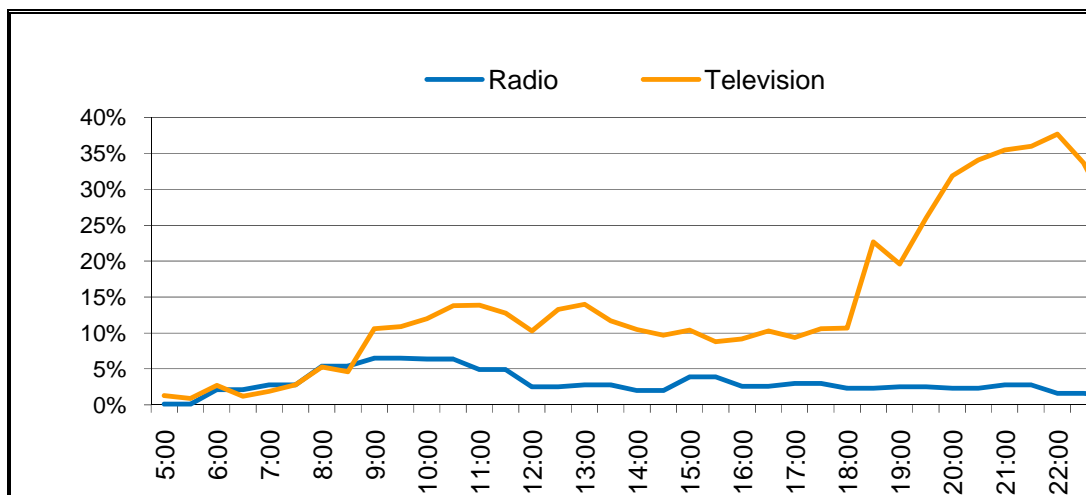
- Iraqis watch television in overwhelming numbers for news about current events. Eighty-seven percent watch daily; 53 percent watch Arab satellite TV specifically. By contrast, close to 47 percent of Iraqis listen to radio weekly for news, and 28 percent read newspapers. Almost a quarter of Iraqis get their news from SMS and around one-fifth from international satellite TV and magazines. In general, the credibility associated with both seeing and hearing events unfold gives television the edge over other news sources.

Most Important Sources of Information for Iraqis



- Even in this TV culture, friends and family are important information sources for many Iraqis; 81 percent depend on them for news every week. Reliance on word-of-mouth sources may be attributed to various mutually reinforcing factors—Iraq’s long-established oral tradition, mistrust of media outlets which tend to reflect the agendas of their financiers, and the neighborhood culture of Iraqi society, strengthened by decades of war as relatives and friends have depended only on one another to meet their basic needs for survival.
- Most Iraqis, 82 percent, are interested in staying informed about current events in their country, with 40 percent saying they are very interested and 42 percent somewhat. Only 17 percent are “not so interested” in staying informed and a scant 3 percent are not interested at all.
- Forty-one percent of Iraqis consider state-run Al Iraqia their most important news source of information, essentially tied with Al Arabiya and Al Sharqia at 39 percent. One-quarter of Iraqis identify Alhurra as their top news provider, just behind Al Jazeera at 27 percent.
- Twenty-two percent of Iraqis regard Radio Sawa as their most important news source, followed closely by Baghdad Radio with 19 percent. Radio Free Iraq comes in third, with 15 percent of Iraqis calling it their top source. Fourteen percent of Iraqis consider international broadcaster Radio Monte Carlo their most important source, and 13 percent cite Radio Nawa.

TV/Radio Reach at Various Times of Day Percentage of Adults Listening/Viewing “Yesterday”



InterMedia Survey of Adults (15+) in Iraq n=2,000

- Most Iraqis watch television at night. Roughly 23 percent tune in around 18:30; audience levels peak between 22:00-23:00 at close to 40 percent. Morning viewing is relatively low; it hovers at 11 percent starting at 9:00 and reaches almost 15 percent at 11:00 and again at 13:00. Iraqi viewing patterns resemble those throughout the Middle East and North Africa—media consumers watch TV in the late evening, after the nightly news, which comes on at 20:00 and sometimes lasts more than one hour, depending on local and regional events. Early- to mid- evening viewers tune in for the day’s news; late-night viewers most likely watch entertainment programs. Heavy news consumers continue their viewing after the evening news by tuning to 24-hour news channels Al Jazeera, Al Arabiya and Alhurra, which cater to their audiences with roundtable discussions, interviews and documentaries.
- Radio listening peaks during the morning commute around 9:00 at 7 percent and remains steady for about the next two hours. Listening stays below 5 percent for the afternoon and evening.

A majority (55.6 percent) of Iraqis tune to Alhurra weekly for the latest in domestic and international news.

TELEVISION MOST POPULAR MEDIUM; ALHURRA FACES COMPETITION FROM LEADING DOMESTIC AND PAN-ARAB CHANNELS

- Iraqis look to television first for their news and information, and with a host of options, both local and pan-Arab, U.S. and international broadcasters face tough competition for audience share. Alhurra Iraq has managed to overcome these obstacles and place itself firmly in the Iraqi media market. A majority (55.6 percent) of Iraqis tune to Alhurra weekly for the latest in domestic and international news. Unlike some pan-Arab stations, Alhurra Iraq effectively competes with the leading domestic channels; Alhurra’s Iraqi presenters and reporters convey the news from a local perspective, focusing mainly on domestic affairs in the context of regional and international events.
- Satellite and pan-Arab broadcasters are particularly popular in Iraq. The leading pan-Arab station is the Saudi-sponsored Al Arabiya with a 67.4 percent weekly audience. The entertainment channel MBC is second in weekly viewing at 55.8 percent. Alhurra comes in a close third at 55.6 percent, ahead of Al Jazeera’s 52.6 percent weekly audience.

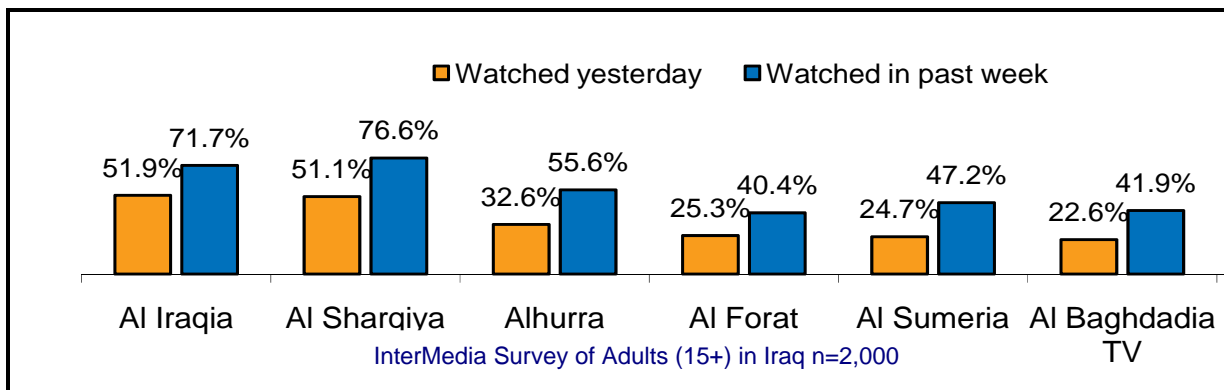
- The most noteworthy of the local channels are privately owned Al Sharqiya and state-run Al Iraqia. Approximately 77 percent of Iraqis watch Al Sharqiya weekly, 51.1 percent daily; 72 percent view Al Iraqia every week, 51.9 percent daily.
- Not quite as popular as the leading Al Iraqia and Al Sharqiya, domestic broadcaster Al Forat is fourth in weekly and “yesterday” viewing, coming in behind Alhurra. Al Forat enjoys a weekly reach of 40.4 percent and a daily reach of 25.3 percent. Al Sumeria exceeds Al Forat’s weekly reach with 47.2 percent, but falls behind in daily reach with 24.7 percent.

Spotlight on Iraqi Domestic Television

A mix of news and entertainment with social commentary

- As one of the first local channels to seize the momentum after the fall of Saddam Hussein, state-run Al Iraqia managed to gain audiences with its distinct Iraqi perspective to the news, its anti-terror stance and entertainment programs. As part of the Iraqi Media Network, Al Iraqia’s link to U.S.-funding has often put the channel on the defensive.
- Al Sharqiya, Iraq’s leader in weekly viewing offering a variety of programming, is privately-owned by Iraqi mogul, Saad Bazzaz. The Iraqi government closed the channel’s Baghdad office in January 2007 for supposedly inciting sectarian strife. However, large numbers of viewers continue to turn to Al Sharqiya for news, satirical comedy, entertainment, drama and socially conscious programs. One of its earliest hits was the Iraqi equivalent to the U.S. reality show, *Extreme Home Makeover*. On the 2004 program, aptly called *Labor and Materials*, workers helped rebuild Iraqi homes destroyed by recent violence.
- Al Forat, owned and run by the Supreme Islamic Iraqi Council (SIIC) and linked to the militant Badr Brigade, has a large audience among Iraq’s Shia population. In addition to other shows, Al Forat airs religious and political programs catering to its base.
- Known best for its production house and web portal (www.alsumaria.tv), Al Sumaria TV airs a generous mix of Iraqi-produced dramas, talk shows, sports and entertainment magazines, game shows and socio political programs. *Man Al Mass’oul (Who is in Charge?)* addresses senior Iraqi officials and the issues facing the country, giving citizens a platform to express their frustration with the current situation.
- Like Al Sumaria, Al Baghdadia TV broadcasts an eclectic mix of entertainment, drama, sports and social programming from an Iraqi perspective. *Shabab Chat* gives young Iraqis the chance to talk about the issues facing youth today, while *Shako? Mako!* approaches the dire Iraqi situation with comedy and satire.

Domestic Television Broadcasters in Iraq Weekly and “Yesterday” Listening Trends

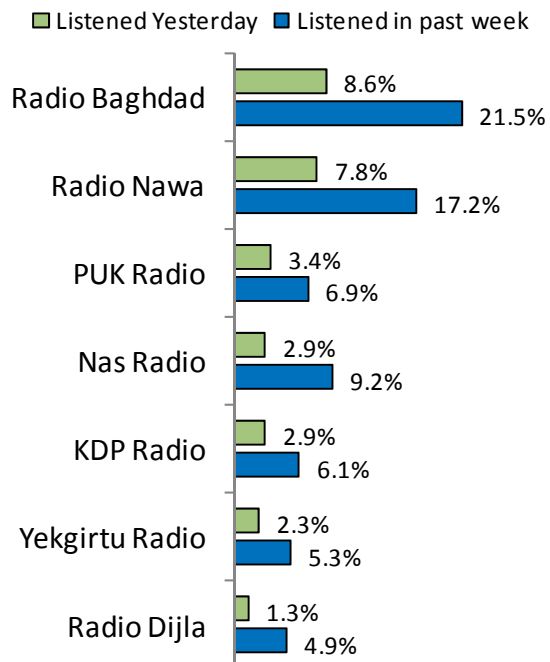


- Al Baghdadia TV reaches 41.9 percent of Iraqis weekly and 22.6 percent daily, slightly lower, yet still comparable, to Al Forat and Al Sumeria.
- Iraq Media Network (IMN), funded by the United States since 2003 along with the other state-run broadcaster, Al Iraqia, comes in last place among domestic television channels with 25.6 percent weekly reach and 16.7 percent daily.

STATE-RUN CHANNELS LEAD IN DOMESTIC RADIO AUDIENCES

- Radio Nawa has become increasingly popular among Iraqis; with funding from the United States and support from the Iraqi government, the station broadcasts in Arabic and Kurdish 24-hours a day across the country. Radio Nawa leads among Iraqi Kurds, whereas nationally it places second after state-run Radio Baghdad. Around 22 percent of Iraqis listened to Radio Baghdad weekly in 2007 and close to 9 percent reported tuning in “yesterday,” up eight and five points, respectively, from 2005. Seventeen percent of Iraqis listened to Radio Nawa in the past week and around 8 percent daily, almost double its 2005 reach levels.
- Iraqi Kurds are significant in driving domestic radio listenership, as evidenced by the weekly reach of the most-listened to stations, such as PUK Radio (6.9 percent), KDP Radio (6.1 percent) and Yekgirtu Radio (5.3 percent), all Kurdish-language stations.
- Radio Dijla describes itself as an independent, commercial, non-sectarian talk-radio station. Formed in 2004, it is last among local stations, with 5 percent weekly reach. Radio Dijla is known for its call-in shows, where regular Iraqis voice their opinions on political and non-political issues. The station’s weekly and daily reach is down by more than half from 2005. A vocal critic of the sectarian violence in Iraq, Radio Dijla was heavily targeted by Al Qaida in Iraq in 2007.

Daily and Weekly Reach of Domestic Radio



InterMedia Survey of Adults (15+) in Iraq n=2,000

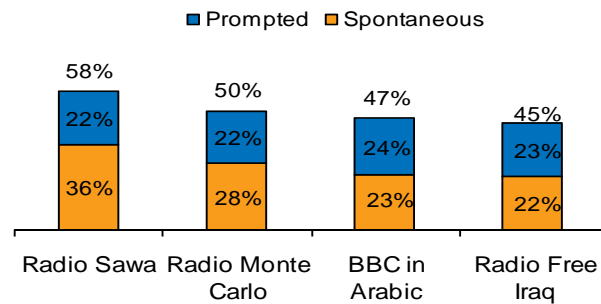
PRINT MEDIA LAGS FAR BEHIND TELEVISION; HALF OF IRAQIS HAVE NOT READ A NEWSPAPER IN PAST WEEK

- Most Iraqis do not read newspapers on a regular basis, preferring to get their news from television and radio, which are largely considered more reliable. After the fall of Saddam Hussein, a massive number of print publications flooded the Iraqi marketplace. Most represented a strong viewpoint, either religious or political. Consequently, Iraqis trust little of what they read in print publications. This ambivalence and lack of trust explains why Iraq's educated society steer clear from newspapers and magazines for their news and information.
- Of those Iraqis who regularly read newspapers, some 15 percent read the U.S.-funded daily, *Al Sabah*. *Al Sabah* has come under fire in recent years for alleged American interference in its content; the paper, along with TV channels Al Iraqia and IMN, is under the umbrella of the Iraqi Media Network. Approximately 5 percent of the population read the break-off publication, *Al Sabah Jadid (A New Morning)*, run by former editors and employees of *Al Sabah* who left the paper under protest.
- *Al Zaman* is the second-most widely read paper in Iraq, with a 13 percent weekly readership. The paper was founded in London in 1997, and many of its editorial staff still work from the paper's office in the United Kingdom.

INTERNATIONAL BROADCASTERS: AWARENESS AND LISTENING

- A majority of Iraqis are aware of international broadcaster, Radio Sawa; 36 percent named the station spontaneously, and a further 22 percent recognized it when prompted, for a total of 58 percent in combined awareness. Radio Monte Carlo is the second-most recognized international broadcaster in Iraq, with 50 percent overall awareness. Around 47 percent of Iraqis are aware of BBC Arabic, and 45 percent are aware of Radio Free Iraq.

Prompted and Spontaneous Awareness



InterMedia Survey of Adults (15+) in Iraq n=2,000

- All the leading international broadcasters have Arabic streams, with Radio Sawa and Radio Free Iraq broadcasting specifically for Iraqi audiences in the Iraqi vernacular. BBC Arabic and Radio Monte Carlo also broadcast in Arabic, but use the formal language to appeal to Arab countries across the region. Both BBC and RMC speak abundantly to Iraqi concerns, but also focus on regional and international news.
- Roughly 29 percent of Iraqis listen to BBC annually, in any language, 14 percent weekly. Close to 7 percent listen to VOA annually in any language, and a little less than 3 percent listen to it weekly.

- University education does not necessarily correlate with weekly listening to international broadcasters. Only 33 percent of Radio Sawa's weekly audience, 24 percent of Radio Monte Carlo's weekly listeners and 19 percent of BBC in Arabic and Radio Free Iraq's weekly audiences have college educations. In fact, only Radio Sawa's weekly listeners are slightly more educated than the general population.

A majority of Iraqis are aware of international broadcaster, Radio Sawa—a total of 58 percent in combined awareness.

Similarly, 41 percent of Radio Monte Carlo's, 37 percent of BBC in Arabic's and 36 percent of Radio Free Iraq's annual audiences have university or college education.

- On the other hand, the percentage of annual listeners to international broadcasters are more educated compared to the general populace. Fifty percent of Radio Sawa's annual listeners are college educated, compared to only 23 percent of the

INTERNATIONAL BROADCASTING: RADIO OVERLAP

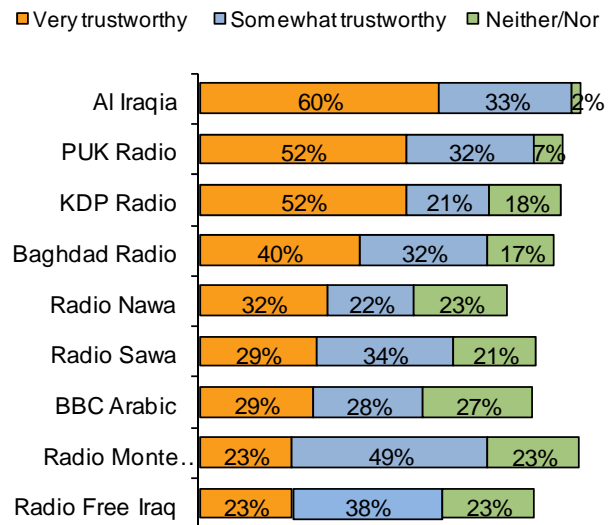
- Only 1.7 percent of Iraqis listen regularly to all four international radio broadcasters: Radio Sawa, Radio Free Iraq, BBC Arabic and Radio Monte Carlo. Twenty-three percent of Iraqis listen to Radio Sawa only and 12 percent to Radio Free Iraq only. For non-U.S. broadcasters, exclusive listening is somewhat lower—10 percent for Radio Monte Carlo only and 8 percent for BBC Arabic only.
- Radio Sawa and Radio Free Iraq share a small percentage of exclusive weekly listeners. Nine percent said they listened to only Radio Sawa and RFI the previous week, more than any other pairing. Shared listeners to Radio Sawa and Radio Monte Carlo make up 8 percent of the stations' exclusive weekly listeners, whereas shared weekly listeners to BBC and Radio Sawa make up 6 percent of their exclusive listeners. Five percent of Iraqi audiences listened

to Radio Sawa, BBC and RMC in the past week; only 3 percent listened to RFI, BBC and RMC.

RADIO BROADCASTER RANKINGS

- The most trusted radio source according to its weekly listeners is state-run Al Iraqia Radio, with 60 percent deeming it very trustworthy and 33 percent somewhat trustworthy. Another state-run station, Baghdad Radio, also rates highly among its weekly listeners; roughly 40 percent feel the station is very trustworthy and 32 percent somewhat.
- Kurdish-language stations are highly trusted by their listeners—52 percent of both PUK’s and KDP’s weekly listeners find the station very trustworthy. Thirty-two percent of PUK’s weekly listeners think it is somewhat trustworthy; 21 percent of KDP’s weekly listeners feel the same about that station.

Most Trusted Sources of Information Percentage of Weekly Listeners to Each Radio Station



InterMedia Survey of Adults (15+) in Iraq: Base: Weekly listeners for each broadcaster,

Al Iraqia n=116, Radio Monte Carlo n=347, PUK Radio n=107, Baghdad Radio n=385, KDP Radio n=97, BBC Arabic n=257, Radio Sawa n=514, Radio Free Iraq n=291, Radio Nawa n=315

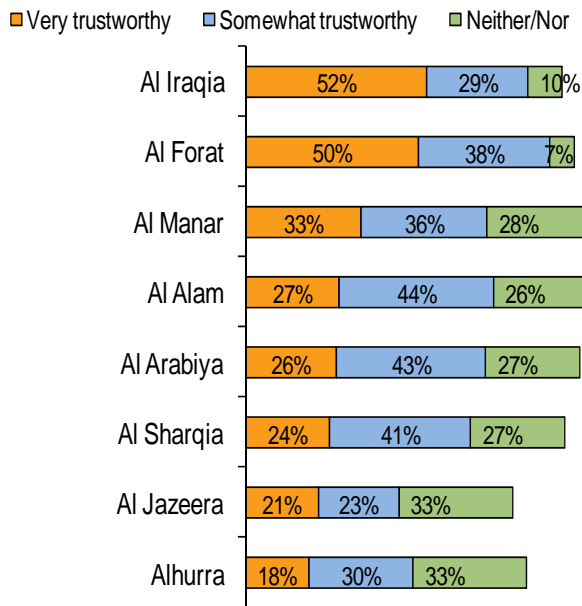
- U.S.- and Western-funded stations rank lower in reliability than their domestic counterparts, although overall trustworthiness is not that different, and the percentage of listeners answering “neither trustworthy, nor untrustworthy” is significantly higher. Radio Nawa (32 percent) and Radio Sawa (29 percent) lead among their own weekly listeners, who consider the stations very trustworthy. Twenty-two percent of Radio Nawa’s weekly listeners find the station only somewhat trustworthy, and 23 percent neither/nor. Alternatively, 34 percent of Radio Sawa’s weekly listeners find it somewhat trustworthy and 21 percent neither/nor.
- BBC Arabic’s weekly listeners are evenly split with approximately 29 percent saying the station is very trustworthy, 28 percent somewhat trustworthy and another 27 percent neither trustworthy nor untrustworthy. Nearly half of Radio Monte Carlo’s weekly listeners find the station somewhat trustworthy, 23 percent find it very trustworthy and 23 percent neither/nor.
- Twenty-three percent of RFI’s weekly listeners say the station is very trustworthy, close to two-fifths find it somewhat trustworthy and close to a quarter of listeners feel it is neither trustworthy nor untrustworthy.

TELEVISION RANKINGS

- According to its regular audience, the most trusted television channel in Iraq is domestic broadcaster Al Forat. Around 88 percent of Al Forat’s weekly viewers find the SIIC-led station either somewhat or very trustworthy and only 7 percent neither trustworthy nor untrustworthy. State-run Al Iraqia also ranks highly among its viewers—a majority 52 percent consider the

station very trustworthy, 29 percent somewhat and 10 percent neither/nor. Al Sharqiya's regular viewers have less confidence overall in the station's news and information; only 24 percent of viewers describe the station as very trustworthy, 41 percent somewhat trustworthy and 27 percent neither/nor.

Most Trusted Sources of Information Percentage of weekly viewers to each TV channel



InterMedia Survey of Adults (15+) in Iraq: Base: Weekly viewers for each broadcaster, Al Iraqia n=1,264, Al Forat n=607, Al Manar n=448, Al Alam n=434, Al Arabiya n=1,298, Al Sharqiya n=1,473, Al Jazeera n=1,074, Alhurra n=1,078

- Al Manar, broadcasting out of Lebanon by Iran-sponsored Hezbollah, inspires some confidence among its weekly viewers, 33 percent of whom find the station very trustworthy, 36 percent somewhat and 28 percent neither/nor. Close to 27 percent of Al Alam's weekly viewers consider the station very trustworthy, 44 percent somewhat and 26 percent neither/nor. Much like Al Manar, Al Alam, which broadcasts out of Iran in Arabic, caters to a sectarian base within Iraq, promoting an Iranian religious and political agenda.
- Saudi-sponsored Al Arabiya's weekly viewers are more likely to label it somewhat trustworthy (40 percent) than very trustworthy (25 percent); more than a quarter consider the station neither trustworthy nor untrustworthy. Nonetheless, Al Arabiya is more popular and more trusted among Iraqis than is Al Jazeera, with viewers ranking the station in much the same manner, regardless of religious affiliation.
- Only 21 percent of Al Jazeera's regular viewers say the station is very trustworthy, 23 percent somewhat trustworthy and 33 percent neither/nor. Iraqis who identify as Sunni Muslim are more likely to find Al Jazeera's news and information very (28 percent) or somewhat trustworthy (37 percent), compared to a mere 10 percent of Shia Muslims who say it is very trustworthy and 9 percent only somewhat.
- Although Alhurra's weekly viewers rank it higher than Al Jazeera in overall trustworthiness, it ranks lower in terms of those who consider its news and information very trustworthy (18 percent). Alhurra's viewers are split evenly among those who consider the channel somewhat trustworthy (30 percent) and neither/nor (33 percent).

AUDIENCE PROFILES: RADIO SAWA

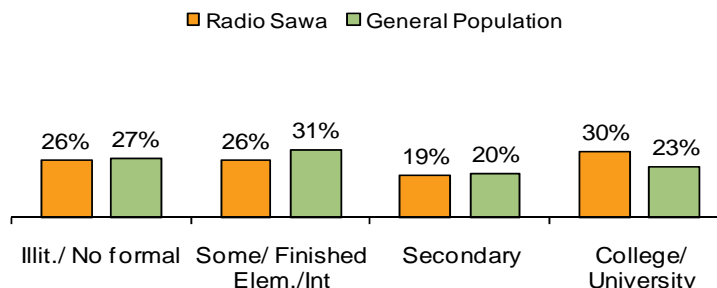
- Radio Sawa is the leading international radio broadcaster in Iraq, even topping domestic broadcasters in both daily and weekly reach. Iraqis also consider Radio Sawa their number one source of news and information. The relative ease to which Iraqis can both tune to Radio Sawa and keep listening once tuned in has helped sustain its popularity. However, despite its positioning, Radio Sawa’s reach has declined significantly since 2005. The growth of domestic radio and television has particularly hurt international radio broadcasters who now have to compete with a more sophisticated, liberalized and free media that speaks directly to the concerns of Iraqis.
- As evidenced by its daily reach of 9.2 percent, weekly reach of 25.6 percent and annual reach of close to half the population (45.2 percent), Radio Sawa’s mix of modern Arabic and Western music with detailed news updates at 15 and 45 minutes past the hour resonates with listeners throughout the country.

Slightly more than half (55 percent) of Radio Sawa’s weekly listeners want to hear more Arabic music on the station; only 6 percent wish to hear more Western music.

- Compared to the general population, Radio Sawa’s regular listeners are more likely to be male than female; specifically, 55 percent are male and 45 percent female, while the gender composition in Iraq is generally a 50/50 split. In terms of residence, age and education, Radio Sawa’s listeners largely mirror the general population of Iraq, although significantly more regular listeners have college/university education, 30 percent, compared to only 23 percent of the general population.

- Radio Sawa reaches close to a quarter of all Iraqi females weekly and 28 percent of all males. Further, its weekly reach averages roughly 26 percent for all age groups, except those 65 and older (11.9 percent). The same trend is true for weekly listening by residence, with 25.7 percent urban and 25.5 percent rural weekly reach.

Radio Sawa Education Composition



Base: n=535 Radio Sawa weekly listeners in Iraq (15+); Base: n=2,000 adults (15+) in Iraq

- Radio Sawa appeals more to Iraqis with higher levels of education than to those with little to no formal education, elementary or secondary education. The station reaches around a quarter of all education segments of society, including those with no formal education. However, weekly reach is significantly higher (33 percent) among Iraqis with college or university education, strengthening the finding that educated Iraqis are more open to Radio Sawa’s modern music/news format, and are more interested in hearing diverse perspectives in the news.
- The majority of Radio Sawa’s regular listeners experience few or no difficulties tuning to the station, rating reception quality either excellent (32 percent) or good (43 percent). Only 17 percent of listeners find reception quality fair; a scant 2 percent rated reception poorly.
- More than half (55 percent) of Radio Sawa’s weekly listeners want to hear more Arabic music on the station; 6 percent wish to hear more Western music. Additionally, close to 31 percent of listeners are happy with the current Western-Arabic music mix.

Fifty-eight percent of regular listeners to Radio Sawa feel the station plays “just the right amount” of news.

- Fifty-eight percent of regular listeners to Radio Sawa feel the station plays “just the right amount” of news, 15 percent say the station plays too much and 24 percent too little. The current format allows for two hourly updates, each one around 15-minutes in length at 15 and 45-minutes past the hour. Listeners can hear the latest news, including breaking events, in between popular Arabic and Western hits, which helps keep them listening in between news segments. A majority, 55 percent, of listeners say they pay more attention to the station when the news comes on; 19 percent pay less attention.

• The most interesting programs on Radio Sawa, according to regular listeners, are *Sawa Chat* and *Ask the World Now*. Twenty-eight percent of regular listeners to the station and show agree that *Ask the World Now* is a very interesting program; 22 percent find it somewhat interesting. Twenty-four percent of weekly listeners also say *Sawa Chat* is very interesting, and 28 percent somewhat interesting.

- A large minority (39 percent) of regular Radio Sawa listeners tune to the station for 15- to 29-minute intervals, whereas one-quarter listens either less than 15 minutes or between 30 and 59 minutes. Only a small portion of regular listeners tune to Radio Sawa for one to two hours (7 percent) or two to three hours (2 percent) at a single sitting. Most listeners who said they tuned into Radio Sawa “yesterday” listened to the station at varying times throughout the day, with a slight peak in the morning hours between 10:00-11:00, when roughly 10 percent reported tuning in.
- A very large majority of Radio Sawa’s regular listeners tune in at home (78.1 percent) compared to in the car (31.8 percent). The uncertain security situation in and around Baghdad, as well as other dangerous areas, precludes safe car travel, which undoubtedly affects potential listeners’ abilities to tune in while driving. Furthermore, limited electricity means many Iraqis, particularly those without generators, listen to battery-operated radios at home for their news and entertainment.
- More than a quarter (27 percent) of Radio Sawa’s weekly listeners say the station has increased their understanding of current events a great deal, nearly half (46 percent) somewhat. Only 7 percent of listeners say the station has increased their understanding of American culture or society a great deal, whereas 44 percent feel it has increased their understanding at least somewhat. One-tenth of Radio Sawa’s weekly listeners say the station has increased their understanding of U.S. policy a great deal; 40 percent say it has somewhat increased their understanding.

A relatively large portion of Radio Sawa’s regular listeners tune in at home (78.1 percent) compared to in the car (31.8 percent).

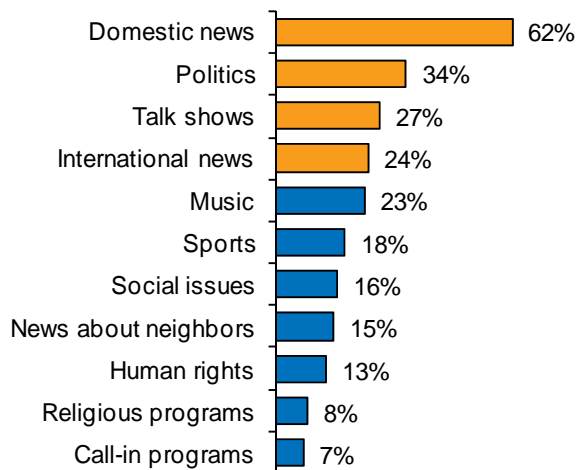
AUDIENCE PROFILES: RADIO FREE IRAQ

- RFI ranks second among international radio broadcasters in Iraq, tying with Radio Monte Carlo in weekly reach (16 percent), but falling slightly below RMC in annual reach (31 percent versus 33 percent). Despite its limited broadcast hours and inconsistent frequencies throughout much of the country, Iraqis consider RFI their third-most important source of news and information, right after Radio Sawa and state-sponsored Baghdad Radio.

A surprisingly large portion—58 percent—of regular listeners to RFI first listened to the station in the last 12 months.
 - RFI appeals to news-hungry Iraqis who are not content to hear just the headlines; they prefer in-depth news and analysis about the pressing issues facing Iraqis. RFI gives these listeners what they crave through its hard-news and features, which highlight the plight of Iraqis at home and abroad. RFI's nightly news programs summarize the most important events of the day, also bringing listeners first-hand news from coalition sources.
 - RFI's regular listeners are more likely to be male compared to the general population, which is evenly split along gender lines; accordingly, close to 59 percent of RFI's listeners are male and 41 percent female. RFI's regular listeners reflect the general population of Iraq in terms of residence and age composition. However, RFI's regular listeners are more likely to have a college or university education than the general population. Although only 23 percent of Iraqis have a college education, the same is true for 26 percent of RFI's regular listeners. Furthermore, 30 percent of Iraqis have only elementary education; the same is true for only 25 percent of RFI's listeners.
 - RFI reaches 19.6 percent of all Iraqi males weekly and 13.6 percent of females. In addition to its male-heavy demographic, RFI's tends to reach a greater number of listeners between 55 and 64, especially compared to other age groups. However, RFI's age composition does not reflect this, particularly since younger Iraqis make up more of the general population. With that in mind, RFI reaches 21 percent of those 55-64, 15 percent of those 45-54, and around 16 percent of those 35-44, 25-34 and 15-24.
- RFI appeals to news-hungry Iraqis who are not content to hear the headlines, but rather expect in-depth news and analysis from their preferred news source.*
- Nineteen percent of Iraqis with college/university education listen to RFI weekly, compared to 13.7 percent with only elementary education. RFI reaches 17 percent and 18 percent, respectively, of Iraqis with either no formal education or secondary education. Similarly, RFI reaches 17 percent of urban residents weekly and only 15 percent of rural residents.
 - The majority of RFI's regular listeners rate reception quality either excellent (14 percent) or good (41 percent). One-third of listeners found reception quality fair, 8 percent poor. Because RFI does not broadcast 24-hours a day, it shares frequencies with other broadcasters; at times, this can be a problem for listeners trying to find it on the dial. Furthermore, interference from other broadcasters in certain geographic regions in Iraq means RFI must inform a portion of its listeners to tune in at other wavebands at certain times of the day.
- A surprisingly large portion—58 percent—of regular listeners to RFI first listened to the station in the last 12 months. Nineteen percent first listened between one and two years ago, 15 percent more than 2 years ago. New listeners make up more than half of RFI's weekly audience, which suggests many of RFI's original listeners either left the country or stopped

listening. Millions of Iraqis have, indeed, fled the country since the start of the war in 2003, and those with higher levels of education (RFI's targeted audience) have much better chances of finding jobs and lives outside of Iraq than those with no formal education or only elementary or secondary education.

Most Important Topics on RFI



Base: n=312 RFI weekly listeners in Iraq (adults 15+)

RFI's regular listeners, although a small minority find features dealing with sports, music, human rights, religion and social issues very important. Most notably, music (23 percent) and sports (18 percent) rank closely to news items, such as international news and talk shows.

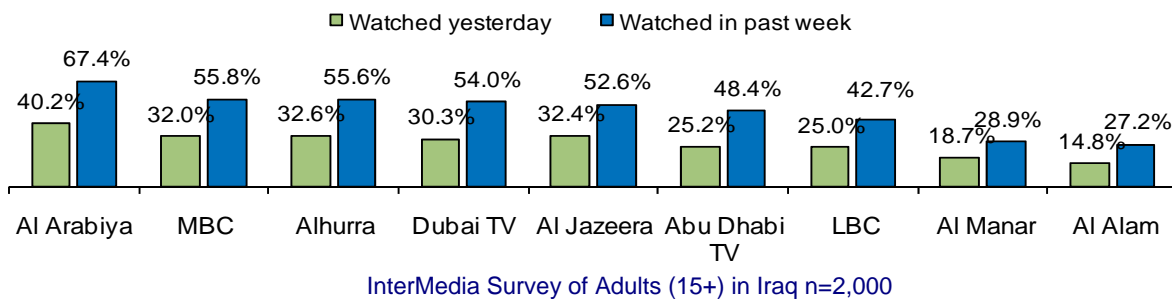
- Compared to one year ago, 46 percent of RFI's regular listeners listen "about the same" amount; 31 percent say they listen even more frequently. Only 14 percent of regular listeners say they listen less frequently than they did one year ago.
- A large majority of RFI's regular listeners feel domestic news is the most important topic; In fact, 62 percent say domestic news tops their list, compared to 34 percent who say politics in general. In addition, 27 percent of RFI listeners would like to hear more talk shows, naming the programming format their third-most important. International news comes in fourth, with 24 percent of RFI listeners naming it their most important topic.
- Non-news items seem to be less important to RFI's regular listeners, although a small minority find features dealing with sports, music, human rights, religion and social issues very important. Most notably, music (23 percent) and sports (18 percent) rank closely to news items, such as international news and talk shows.
- Close to half of RFI's regular listeners tune in at specific times to hear the news. RFI's live evening newscast is a staple in homes across Iraq, particularly due to its comprehensive focus on Iraqi political affairs and the ongoing conflict in its program, *Iraqi News File*. Twenty-one percent listen to RFI only when someone in their household tunes in, and 14 percent keep the radio tuned to RFI constantly, even though it does not broadcast all day. Thirteen percent of RFI's regular audience say they listen to the station when they come across it by chance on the radio.
- Thirty percent of regular RFI listeners tune in to the station for at least 16-29 minutes, whereas 32 percent listen for between 30 and 44 minutes. Only 18 percent of RFI's regular audience listens for less than 15 minutes and a tenth between 45 and 59 minutes. RFI's listening trends suggest that although roughly half of regular listeners typically tune in to hear the main headlines and then switch the station, another 40 percent listen longer to hear what comes after the main headlines—namely, deeper analysis, music and other non-news features.

Close to half of RFI's regular listeners tune in at specific times to hear the news.

AUDIENCE PROFILES: ALHURRA

- Alhurra places second in daily reach and third in weekly reach among pan-Arab and international satellite channels in Iraq. It is the second-highest rated news source behind Al Arabiya, enjoying a larger audience than the pan-Arab leader in news, Al Jazeera. MBC leads among the entertainment channels Dubai TV, Abu Dhabi TV and Lebanon's LBC.

International Satellite Television Channels in Iraq Weekly and "Yesterday" Listening Trends

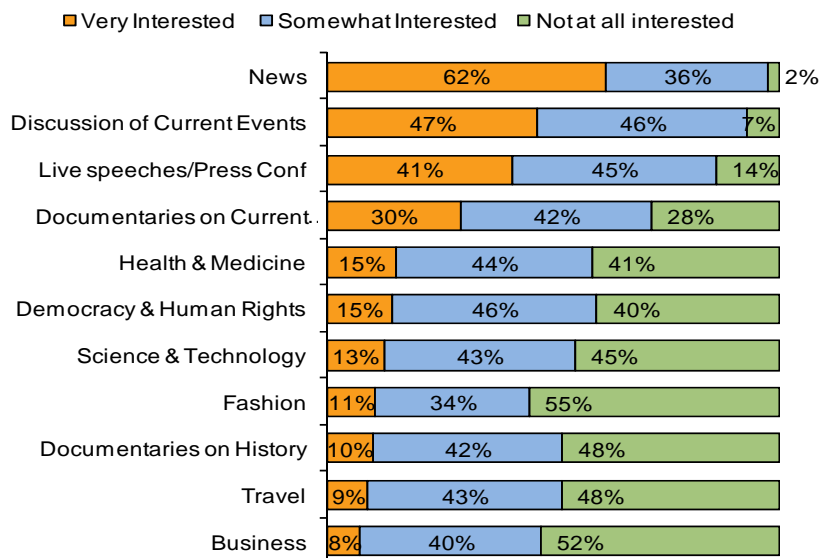


- Overall, Alhurra's audience composition mirrors the gender and age demographics of the general population in Iraq. Education is the exception; whereas only 23 percent of the general population has college or university degrees, the same holds true for 28 percent of Alhurra's weekly viewers. Furthermore, only 22 percent of Alhurra's regular viewers are illiterate or have no formal education, compared to 27 percent of the overall population in Iraq. Alhurra's regular viewers are also more likely to be city dwellers (73 percent) than rural residents (27 percent) compared to the general population (68 percent urban and 32 percent rural).
- Alhurra reaches 57 percent of all Iraqi males weekly and 53.6 percent of females. The channel's weekly reach among the different age groups exceeds 50 percent for all segments (except those over 65), nearing 60 percent among those 25-34 (58.7 percent) and 35-44 (59.9 percent). Compared to its overall weekly reach, Alhurra appeals more to those 25-44.
- Alhurra's weekly reach rises progressively among segments of the population with higher levels of education. At the lower end, Alhurra only reaches 44.4 percent of Iraqis with no formal education, and to 55 percent weekly for those with at least an elementary education. Nearly 58 percent of Iraqis with secondary education view Alhurra weekly, slightly higher than the national audience figures. Alhurra reaches a considerable 68.1 percent of Iraqis with college or university education, more than 10 points higher than the average weekly reach for the total population. *Alhurra's weekly reach rises progressively among segments of the population with higher levels of education.*
- Urban residents are more likely to watch Alhurra than rural, most likely due to easier access to satellite dishes and higher levels of education in cities relative to rural areas. An overwhelming 97 percent of Alhurra's regular viewers access the channel via satellite

dish. Alhurra has a weekly reach of 59.5 percent among urban dwellers, marginally higher than its overall weekly reach, whereas it reaches only 47.1 percent of rural residents weekly.

- Three-quarters of Alhurra’s regular viewers watch the channel either daily (38 percent) or several days per week (37 percent). Only 19 percent of Alhurra’s regular viewers watch the channel one to two days a week, and less than 4 percent reported watching “from time to time in the last month.”
- Alhurra viewing peaks from 20:00 to 22:00, with nearly 30 percent of “yesterday” viewers tuning in at those times. Viewing remains high, averaging at 25 percent, until midnight. Daily viewers typically begin tuning into the channel around 18:00 (16 percent), and increase gradually at 19:00 (19 percent) until the 20:00 peak.

Most Important Programming Topics on Alhurra



Base: n=1,131 Alhurra weekly viewers in Iraq (adults 15+)

- Alhurra’s regular viewers watch mainly for news, with 44 percent naming it the main reason they tune to the channel. Thirty percent tune in at specific times to watch particular programs and only 12 percent watch when they happen to come across it while flipping through the channels.
- Alhurra’s weekly viewers are overwhelmingly interested in watching the news on Alhurra, and are least interested in business programs. Regular viewers also enjoy discussions of current events and live coverage of press conferences and speeches by important political figures. A small minority

are very to somewhat interested in documentaries and non-news features, like programs on democracy and human rights, health and medicine, and science and technology.

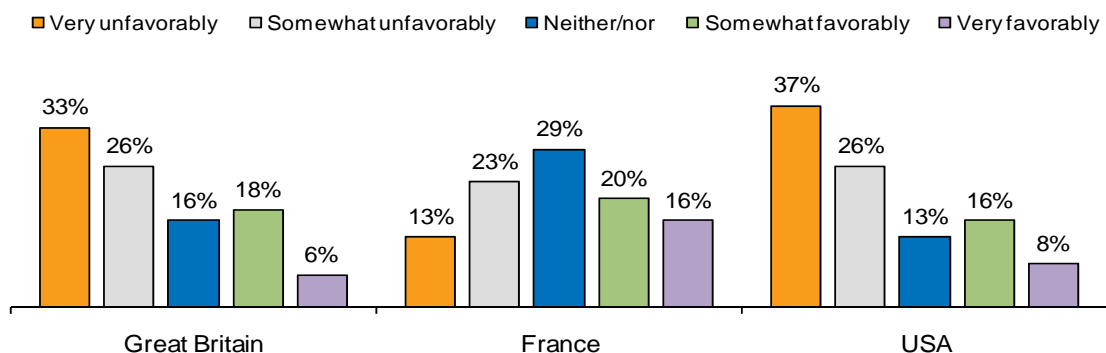
- Approximately 27 percent of Alhurra’s weekly viewers say the channel has increased their understanding of current events a great deal and 50 percent somewhat. Eighteen percent believe the channel has increased their understanding of American culture or society a great deal, 39 percent only somewhat. Finally, roughly 17 percent of Alhurra’s weekly viewers say the channel has increased their understanding of U.S. policies a great deal, 41 percent say only somewhat.

OPINIONS AND ATTITUDES

- A large majority of Iraqis are very (39 percent) or somewhat interested (42 percent) in staying informed about current events in their country. Few said they are not so interested and only a handful not interested at all. Furthermore, 59 percent of Iraqis access news at least two to three times a day.
- Specifically, two-thirds of Iraqis are very interested in news about their own country, but only 11 percent are very interested in news about other Arab countries and 28 percent fairly interested. Even fewer Iraqis say they are very interested in news about Europe (4 percent) and the United States (5 percent), but when adding those who said they are at least fairly interested, figures for both Europe and the United States rise to a small minority of 20 percent and 32 percent, respectively.
- Iraqis have become considerably more negative toward the United States in the last two years; in 2005, 28 percent of Iraqis said they were very unfavorably inclined toward the United States, but in 2007 that figure rose to 37 percent. Similarly, in 2005

Iraqis were substantially more pessimistic about the situation in their country in 2007; around 60 percent said the country is moving in the wrong direction, and only 40 percent said it was moving in the right direction, a 180 degree switch from just two years ago.

How favorably inclined are you toward the following countries?



InterMedia Survey of Adults (15+) in Iraq n=2,000

only 15 percent of Iraqis said they were somewhat unfavorably inclined toward the United States, but in 2007 twenty-six percent said the same. Most interestingly, the percentage of Iraqis who said they were neither favorably nor unfavorably inclined toward the United States changed dramatically in the last two years. Thirteen percent of Iraqis held a neither/nor opinion toward the United States in 2007, whereas 32 percent of Iraqis felt the same in 2005.

- Kurds in Iraq are much more likely to be favorably inclined toward the United States than are Arabs—a large majority (60 percent) of Kurds said they are very or somewhat favorable toward the U.S., but the same was true for only 15 percent of Arabs. In 2007, Arab Sunnis (33 percent) were also more likely to be somewhat or very favorably inclined toward the U.S. than Arab Shias (18 percent). In contrast, in 2005 those who identified themselves as Shias were more favorably inclined than Sunnis—15 percent versus only 6 percent for Sunnis.
- Iraqis are substantially more pessimistic about the situation in their country in 2007; 60 percent said the country is moving in the wrong direction compared to only 40 percent who said it is moving in the right direction, a 180 degree switch from just two years ago. In 2005,

Iraqis were much more optimistic, but sectarian violence and continued political strife have dampened many of their aspirations.³

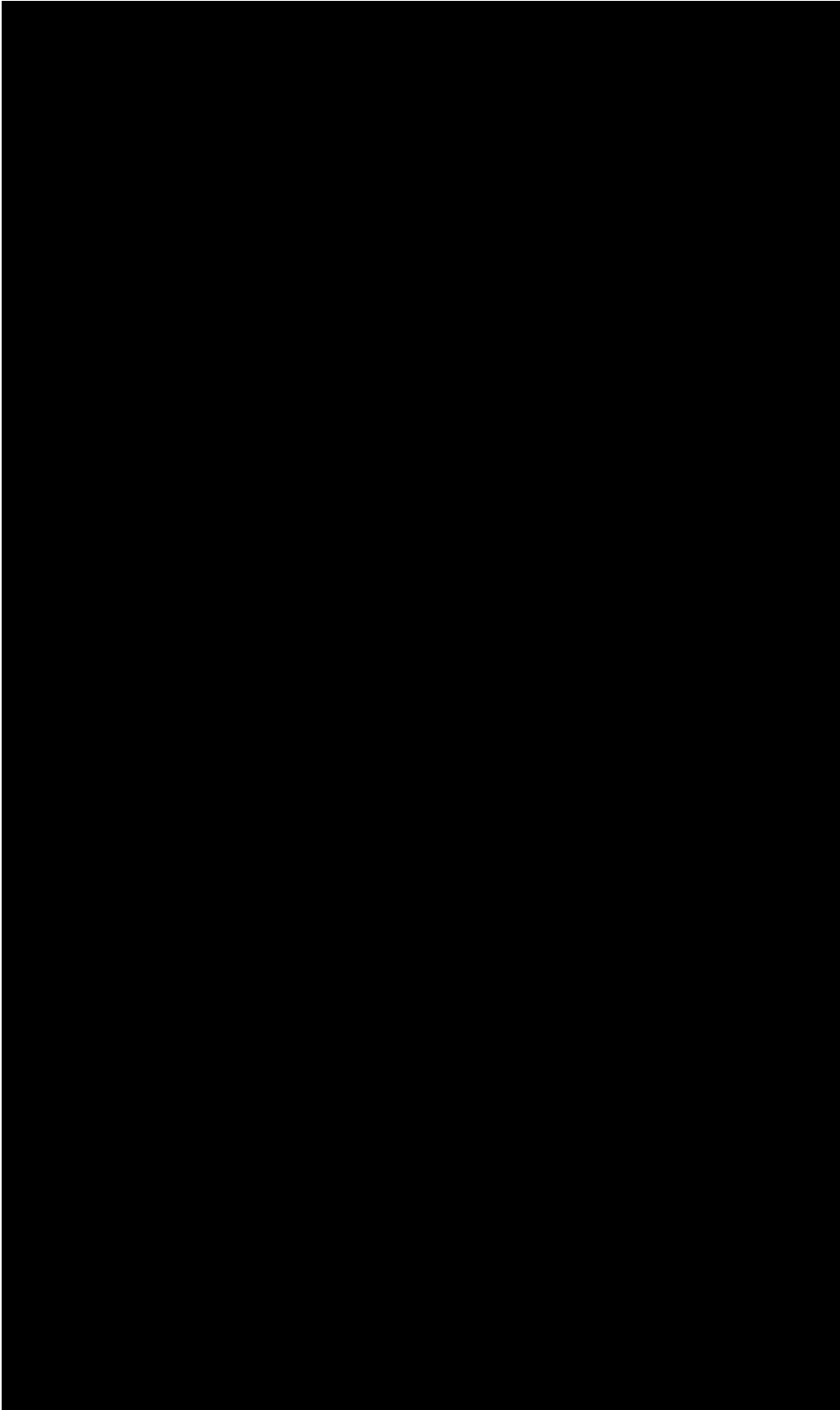
- As evidenced by measures, such as attending a mosque and praying regularly, Iraqis have become markedly less religious in 2007. In fact, notably fewer report doing both activities. In 2007, 4 percent said they attend mosque regularly, 10 percent several times a week and 12 percent once per week, down by a couple of points since 2005. Likewise, 64 percent of Iraqis said they regularly pray five times a day, down from 74 percent two years ago. In 2005, 78 percent of Iraqis reported fasting regularly for Ramadan, whereas only 62 percent said the same in 2007.

³In 2005, 62 percent of Iraqis said the country was moving in the right direction compared to only 34 percent who said it was moving in the wrong direction.

Appendix I: Demographics

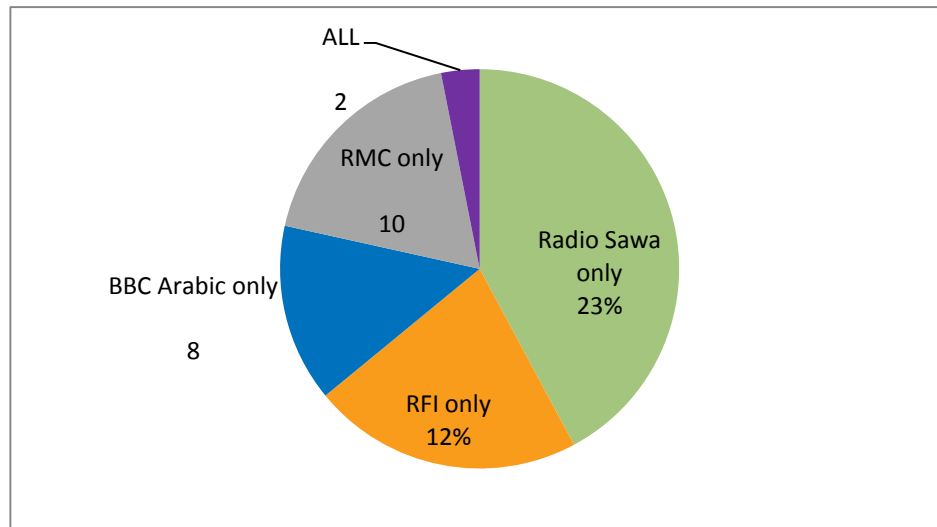
	Sample	Arabic Speakers	Radio Free Iraq	BBC Arabic	Radio Sawa
	100%	79.6%	16.6%	13.8%	25.6%
<i>Sex</i>	%	%	%	%	%
Male	50	50	59	61	55
Female	50	50	41	39	45
<i>Age</i>	%	%	%	%	%
15-24	27	27	27	25	28
25-34	24	24	23	24	23
35-44	19	20	19	21	20
45-54	16	16	14	21	15
55-64	13	13	17	9	14
65+	1	0.4	0.4	1	0.3
<i>Education</i>	%	%	%	%	%
Illit./No formal	27	27	28	24	26
Some/Finished Elem./Int.	30	30	25	26	26
Secondary	20	20	21	18	19
College/University	23	24	26	31	30
<i>Nationality</i>	%	%	%	%	%
Kurdish	19	0.1	5	8	10
Arab	80	100	95	92	90
Yazidi	0.2	0	0.0	0	0
Assyrian	0.2	0	0.2	0.3	0.2
Turkoman	0.2	0	0	0.1	0.3
Armenian	0	0	0	0.1	0.1
<i>Language</i>	%	%	%	%	%
Arabic	80	100	94	92	89
Kurdish	20	0	5	8	10
Turkoman	0.2	0	0	0.1	0.3
Other	0.1	0	1	0.1	0.2
<i>Residence</i>	%	%	%	%	%
Urban	68	68	71	66	69
Rural	32	32	29	34	31
<i>Religion</i>	%	%	%	%	%
Sunni Muslim	39	25	20	27	33
Shia Muslim	60	75	79	72	66
Other	0.2	0	0.0	0	0
Christian	0.3	0.1	0.2	0.4	0.3
Muslim	0.4	0.3	0.3	1	1
<i>Income Quartiles</i>	%	%	%	%	%
Low	35	40	35	35	36
Med-low	40	39	42	39	42
Med-high	20	18	19	20	19
High	5	2	4	6	3

Base: n=2000 adults (15+) in Iraq; n=1617 Arabic speakers; n=312 RFI Weekly listeners; n=277 BBC Arabic Weekly listeners; n=535 Radio Sawa Weekly listeners in November 2007



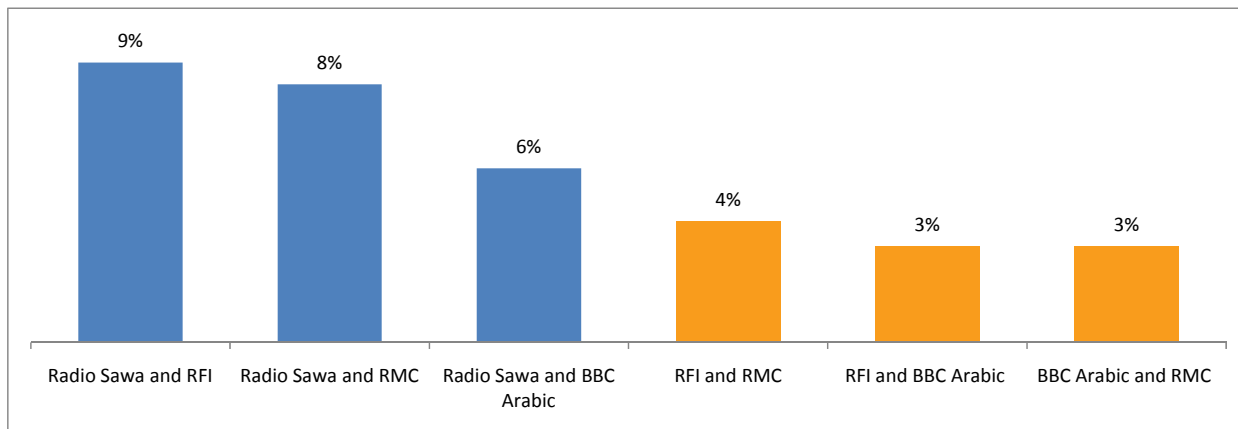
U.S. and International Radio Broadcasters Overlap

International Broadcasters Weekly Radio Audience



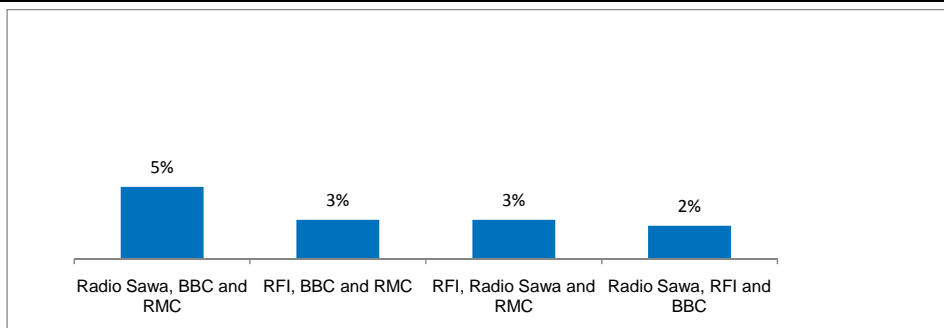
Base: n=905 weekly listeners to major Western stations (Radio Sawa, BBC Arabic, RFI and RMC) (adults 15 and older) in Iraq

International Broadcasters Weekly Radio Audience Overlap



Base: n=905 weekly listeners to major Western stations (Radio Sawa, BBC Arabic, RFI and RMC) (adults 15 and older) in Iraq

International Broadcasters Weekly Radio Audience Overlap



Base: n=905 weekly listeners to major Western stations (Radio Sawa, BBC Arabic, RFI and RMC) (adults 15 and older) in Iraq

Appendix III. Research Inputs

Methodology	Face to face interviews conducted with adults (15+) in Iraq
Sample size	2,000
Sample universe	Total population of Iraq is 29,000,000. Survey is nationally representative of 16,820,000 adults (15+) in Iraq. (Source: Population Reference Bureau 2007 Data Sheet)
Fieldwork dates	September 3-14, 2007
Local fieldwork agency	D3 Systems in Iraq
Margin of error	Margin of error with a 95% confidence interval is ± 2.2 for the full sample. The range of error is larger for subgroups within the sample.
Remarks	
Other source notes	