



SYRIA AUDIENCE RESEARCH STUDY

JANUARY 2021



**FREE
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FREE
PRESS
UNLIMITED**

Acronyms

FPU	Free Press Unlimited
IDI	In-depth interview
RT	Russia Today
NGO	Non-Governmental Organization
SIDA	the Swedish International Development Agency
SDF	Syrian Democratic Forces
NES	North-east Syria
NWS	North-west Syria
SCS	South and Central Syria

Table of Contents

1.Executive Summary.....	4
1.1Key Findings.....	4
2.Background.....	4
3.Methodology and Sampling.....	6
4.Limitations and Challenges.....	10
5.Findings.....	10
6.Recommendations and Lessons Learned.....	26
6.1 Lessons Learned to Inform Future Research Studies.....	26
7.Conclusions.....	26

1. Executive Summary

1.1 Key Findings

Syrians

- Greatly desire news that is free from political partisanship and interference
 - o Are reflective and capable of making conscious and informed decisions
 - o Are resourceful, reflective and desire the full picture of news and events
 - o Value variety in terms of sources, and are therefore often drawn to digital platforms that facilitate a diversity of choice; as a way to check news and besides valuing pluralism (repeated below)
 - o Are flexible and partial to changing their consumption habits if they begin to notice too much perceived bias in the outlets they use
 - o Feel that the majority of content in the Syrian media landscape is not objective or credible enough
 - o Believe that media, if and when truly independent, has an important role to play in society as a watchdog and a unifier
 - o They prefer breaking news, accurate and exclusive news

Other Key Insights

1. Use of digital tools for news far outstrips traditional news formats (while radio is still valued by some, it must be digitized to reach a wider demographic of consumers)
2. Major interest in regional news, notably security, political and economic news (many prefer economic news in TV / bulletin form) but also culture and the arts
3. It is not merely the news topics they are interested in, but a more humanistic approach to what the news covers. Human stories are greatly valued. They value media that promote common interests.
4. Encrypted messaging apps enable women to have a safe space through which to share and discuss the news.
5. Syrians who use digital platforms the most frequently are more likely to search for extra information, and make conscious and informed decisions about the sources they use; finding a variety of sources is key in an environment where trust is very low.
6. When TV is the preferred choice of medium, respondents are less critical and less likely to seek out more information.
7. Respondents stated that they have changed their consumption preferences based on perceptions that outlets are biased or spread hate speech. There is a desire for balanced news.

2. Background

Free Press Unlimited (FPU) contracted a team of international and Syrian research experts to design and conduct an audience research study of media consumers in Syria. The objective of this research study was to provide data about and insights into the media consumption patterns and the information needs of the Syrian audience as well as their perceptions and attitudes towards media. These findings can help FPU and their partners to gain a greater perspective on the audience groups in Syria and thereby contribute to improving their programmatic strategies. Furthermore, this will inform independent media organizations about how they are perceived within Syria and how best to fulfil the information needs of Syrians as part of an effective, organized and professional Syrian media landscape.

The study was based on the following research questions:

- *Q1: Assess the media consumption patterns of Syrian audiences (time, device, content)*
 - *Q2: What are the news and information needs of Syrian audiences?*
 - *Q3: What are the format and content preferences of Syrian audiences?*
 - *Q4: What online and offline sources do Syrian audiences use for their news and information needs?*
 - *Q5: What level of trust do Syrian audiences have in a range of online and offline news and information sources, including independent media?*
 - *Q6: What do Syrian audiences perceive as independent media?*
 - *Q7: What are the attitudes of Syrian audiences towards content that offers more partisan/unilateral stances or more pluralistic/middle-ground approaches to issues covered?*
 - *Q8: How do Syrian audiences' value independent media and what role do they play in their daily lives?*
 - *Q9: How have media development interventions helped strengthen the independent media sector and supported cohesion, dialogue and peace-building amongst Syrian audiences?*
 - *Q10: How has the support of Free Press Unlimited contributed to a strengthened independent media sector?*

The intended users of this study will be FPU partners, beneficiaries, including journalists, editors, and media associations, other relevant stakeholders such as NGOs and donors who engage with media and civil society in Syria, FPU, and the Swedish International Development Association (SIDA). and.

FPU intends to use this study in order to support Syrian media organisations' work, future program design, and also to be leveraged for future funding proposals, outreach to donors as well as for public policy papers.

3. Methodology and Sampling

The data was collected during September and October 2020 in seven different locations inside Syria in order to gain a diverse range of perspectives from Syrian audience groups, focusing on individuals with different religious, political, ethnic and social backgrounds as well as age, gender and education differences.

Combining qualitative and quantitative methods of data collection, the design of this research study applied a mixed-method approach and conducted six different types of data collection across seven locations.

The selected hubs were as follows:

North-east Syria

North-East Syria comprises the region which was partially under previous control by ISIS. The region includes the governorates of Ar-Raqqa, Deir-ez-Zor and Al-Hasakeh. Most of the NES's land mass was under ISIS control until 2017. These Governorates are now controlled by the Syrian Democratic Forces (SDF), although smaller parts are also controlled by the Government of Syria (GoS) and Turkish-supported rebel forces (effectively under Turkish control).

North-west Syria

Northern areas of Idlib province are the only remaining area of Syria still under the control of Hayat Tahrir al-Sham (HTS), who are the dominant opposition group. Armed groups operating in Idlib represent the remnants of armed opposition groups that have challenged the governments rule since 2011 as well as some extremist groups that have emerged during the course of the conflict. This geography is under strong influence from Turkey. The country has even direct control over parts of northern Syria that is dubbed Euphrates Shield area in reference to the Turkish military operation launched in 2016.

South and Central Syria

The South and Central (SCS) areas of Syria including the capital city of Damascus, Sweida and recently Dara'a are currently under government control, except for a small region in the south-east that is controlled by US-backed anti-government rebels.

The specific research locations were as follows:

- Damascus (CE + S)
 - o Al Swaida (CE + S)
 - o Aleppo countryside
 - o Idlib
 - o Al Raqqa
 - o Al Hasakeh
 - o Qamishli

Data collection:

The team employed a variety of methodologies to gain insights:

Qualitative and Quantitative Recruitment Interviews: short 15 minutes interviews to identify the respondents that are best suited to participate in the diaries, clinics or the in-depth interviews. The goal of the short recruitment interviews was to identify people who are regular media and social media consumers. Participants were selected based on pre-determined, interlocking variables of age, gender, education and location. A total of 110 recruitment interviews were conducted (planned: 80).

Qualitative and Quantitative Media Consumption Diaries: the participants complete a 7-day personal diary documenting their individual media consumption habits. A total of 44 people

4.Limitations and Challenges

A number of limitations and challenges were highlighted and were addressed, in consultation with the project coordinator. The main changes were as follows:

- For the IDIs, interviewers noted that there was some difficulty in getting respondents to take part. Scheduling meetings with many respondents could not be easily achieved due to frequent cancellations and postponements. This issue was also apparent during interviews with media professionals. As envisaged, the total number of respondents could not be accessed, but the interviewers interviewed as many as were available in the given time frame. To mitigate this, we

allocated certain times and ensured a degree of flexibility when arranging interviews.

- o Interviewers reported that interviewees commitment to answering questionnaires and other surveys throughout the duration of the data collection dwindled as the collection progressed. To mitigate participant attrition, we offered compensation for the participants in the clinics and diaries as well as regularly contacting them to ensure complete responses.
- o Interviewees noted that there were too many questions in the clinics and surveys and participant fatigue affected the overall responses and engagement of the respondents.
- o Some interviewees and respondents were reserved in expressing their opinions in areas controlled by the Syrian Government during the survey collection phase. To ensure transparency we informed interviewees prior to the interview taking place that all of their personal information will be confidential and non-publishable.
- o Security threats and hazards, including an explosion in the Al-Bab area of Aleppo, resulted in delays collecting data from the clinics questionnaires in Aleppo. As such, the researchers had to reschedule interviews to ensure safety for both them and the respondents.

5. Findings

RQ1. Assess the media consumption patterns of Syrian audiences (time, device, content)

“Today I use the internet to reach information, and that was not possible a couple of years ago because the internet was not available as it is today, and I did not know how to use it, and now there are more websites and social media that publish mainly about news, unlike the past years.” - IDI

The data to answer this research question came from IDIs, surveys, clinics and diaries. Since the emergence of smartphones enabled ease of access to digital media, the use of digital platforms by Syrians to consume news has shot up dramatically – to the extent where mobile platforms now easily overshadow televisual and radio platforms for news consumption. In stark contrast to these latter-day traditional formats, the internet as an information portal has led to a more fluid culture of consumption habits, where Syrians move between different sources and absorb a variety of voices and opinions.

In the useable 1035 surveys that were conducted, almost 67% (690) of respondents use messaging apps **more than three times a day** (WhatsApp, Telegram, Viber, SMS) to access news. These apps not only act as a facilitator of news consumption, but are also an environment through which friends and families can discuss stories securely through encrypted

software. Social media platforms such as Facebook, Twitter, were the **second-most used** with a percentage of 51% (538) respondents engaging 3 or more times per day. Video platforms such as YouTube were the third-most used among surveyed respondents but people use video platforms less frequently with only a small percentage (16%) of respondents using the platform 3 or more times per day.

While all platforms are different, in the context of consumption habits, they are naturally interconnected. Stories found on social media and YouTube are often shared on WhatsApp and Telegram. YouTube videos are regularly consumed on both Facebook and Twitter. With this in mind, it is also worth viewing Syrian’s consumption habits under the broader umbrella of digital tools or the Internet.

Of the 544 entries into the **diaries**, time spent watching ranged from less than 20 minutes (15%) each day to 5 hours (less than 1%). The most frequent daily viewing time was split between 40 minutes (30%) and one hour (29%). Approximately 20% of the viewing slots lasted 20 minutes.

Diary participants reported that they were planning to share the content approximately 42% of time. Some diary participants were not planning to share content (37%) or were unsure (20%) if they would share it. The content that they planned to share through messaging apps was generally social, cultural and entertainment-based programming and news.

Mobile phones are the news lifeline for Syrians in this study. For one respondent in Idleb, turning to social media on their mobile phones was a matter of necessity due to their situation: *“because of the power outage we are unable to watch TV or listen to the radio, so we use social media to keep up with the news, which we started using after the conflict started, before that we did not have WhatsApp or Telegram groups, and we did not know about news websites, we only used newspapers, TV, and radio. After the change of circumstances, we needed to find an alternative.”*

Not only were messaging apps the most used, the average hours spent on each platform at one time was also higher for digital platforms, ranging from a high of **2.9 hours to a low of 1.3 Hours**, with the highest for Messaging Apps (2.9H), followed by Social Media (2.7H), then TV (2.1H).

Table 1 shows the number of hours spent on each platform, disaggregated by location.

	TV	Radio	Print (newspapers, magazines, etc.)	Social Media (Facebook, Twitter, etc.)	Video Platforms (YouTube, Dailymotion, etc.)	Messaging Apps (WhatsApp, Telegram, Viber, SMS)	News websites	Other websites
diaspora	1.9	1.2	0.9	2.4	1.9	2.1	1.3	1.0
NE	2.3	1.5	1.3	2.7	1.9	3.1	1.3	1.2
NW	2.1	1.4	1.4	2.6	1.9	3.6	1.2	1.2

SCS	2.1	2.2	2.1	2.9	2.2	2.6	1.6	1.8
Grand Total	2.1	1.8	1.7	2.7	2.0	2.9	1.4	1.3

The table above shows consistency in terms of time spent on platforms across the different ‘hubs’ in Syria. While messaging apps are used for the longest period in North-west Syria, print and radio are consumed for the longest amounts of time in SCS. Another insight from drawn about SCS, as well as other hubs, is that print, when it is consumed, is done so for a longer period of time than time spent on news websites. “Time spent” is often a proxy measure for value of an outlet as an information source.

The comparatively less popular traditional devices was further evidenced by the fact that 84% (876) of respondents were **least likely to visit** the radio and 89% (926) were least likely to visit print (newspapers, magazines, etc.)¹ even once a day. Nearly half of respondents (48%) stated that they did not use TV at all on a daily basis, with the next highest frequency being for those who tuned in once per day (21%).

This is corroborated by the diaries and In-depth Interviews. According to the **diaries**, 53% of respondents use social media, in which their phones are the dominant device, while 39% use TV as the main device. Computers are rare, and tablets as well. In the **IDIs**, 16 out of 22 (73%) respondents **utilise digital platforms** – the internet, social media and messaging apps - as their most favoured medium to access news. 11 out of 22 (50%) respondents stated that social media specifically was their **most favoured medium**. Only 5 out of 22 (23%) IDI respondents stated that **TV was their favoured medium**.

To better understand the nature of how news is consumed specifically on messaging apps however, including which platforms are linked to the most between correspondents, the team dug deeper to answer why these trends are occurring.

The **7-day diaries component** of the research provides insights into daily media consumption patterns. A total of 44 people were recruited to complete a 7-day media and social media diary. The deep dive into these consumers’ lives suggests the following observations about media consumption patterns:

- Diary participants reported watching fewer than 2 programs per day.
 - o There was very little variance in which days of the week people watched television; Monday and Tuesday appeared to have the most people tuning in. While Monday was popular, people watched the fewest average number of programs on this day (an average of 1.35 programs compared to an average of 1.86 on the other days).

¹ The availability of newspapers is severely limited across Syria, mainly for security reasons, and therefore usage may eventually climb to a limited extent among older respondents, in the event that print media becomes more widely available in future.

- o Heavy TV viewing hours are at 9 a.m. and 10 a.m. and from 6 p.m. to 11 p.m. News programs that air at 7 p.m. were popular.
- o Most people are consuming content alone (52%).
- o Over 37% are watching with family members and approximately 10% are watching with friends.

There were also one or two notable outliers in the IDIs. The one respondent who worked in the media industry focussed on **multi-channel news websites** for their media consumption, as well as following TV and radio closely; social media was their third-most popular platform. Only **one IDI under 34** preferred TV and news agencies to social media (even so, they preferred to watch live broadcasts when they did use social media channels).

Chart 1: social media habits divided by gender

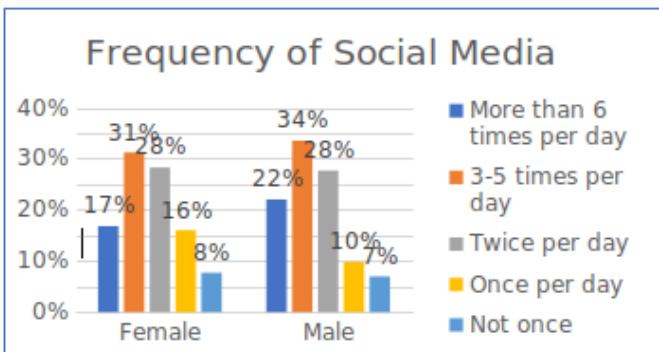


Chart 2: Messaging Apps divided by gender

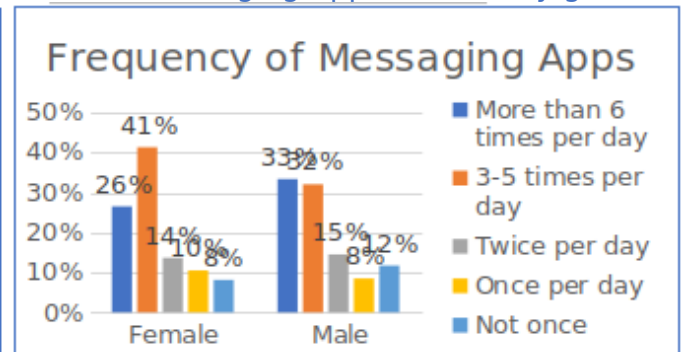


Chart 3: News websites divided by gender

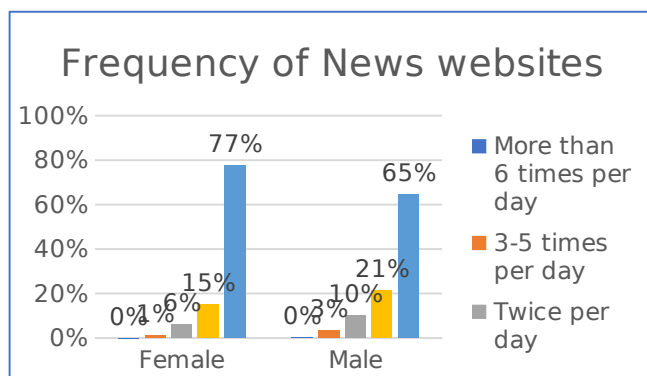
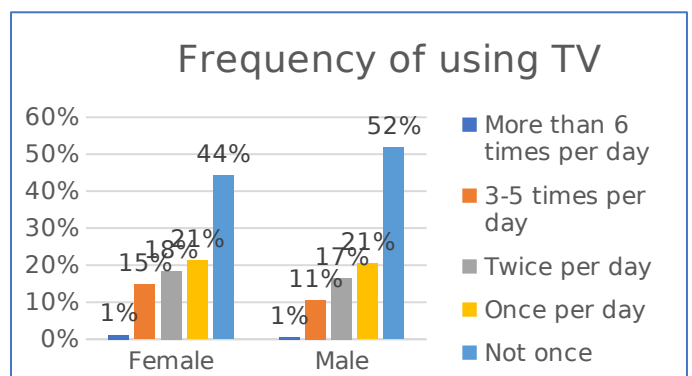


Chart 4: TV habits divided by gender



The overall findings are consistently reflected across gender, age and education, but there are notable differentials in the interlocking variables. For example, while 41% of surveyed female respondents use messaging apps 3-5 times per day, only 7% of women in urban Damascus have the same habits. Instead, the rate of usage climbs significantly, with **77% of women in urban Damascus** using these apps more than six times per day. This may be reflective of the extra need for encrypted security in SCS, but may also speak to a wider trend among women in Syria: that WhatsApp, Telegram and Viber provide a safe space for them to interact

and consume news away from the abuse often found in online spaces and community forums.

"I stopped watching some TV channels because they were not impartial in reporting news and they are politicized channels that follow the state's approach and its policy." - IDI

Another important finding shows that consumption habits can be fluid based on the consumer's satisfaction with the media on offer. In the IDIs, **more than half of respondents** (59%), stated that they have **changed their consumption preferences** in the past based on the increase in perceived bias or hate speech in Syrian media outlets. "I do not follow the media with sharp political positions, but I follow the professional alternative media, and I try to obtain the same information from more than one source and I boycott the information to extract the logic from it." This observation is also supported in the opened ended questions posed in the clinics and the diaries. Syrians want news about their community. While most IDIs focus was on changing or rejecting Syrian media, a few exceptions also included international outlets (Al-Jazeera, Al-Arabiya).

Whether to compare different accounts from other sources, or simply to look for more facts online, **18 out of 22 (82%)** IDI respondents stated that they would either search for more information regularly after consuming media, or just sometimes, or only if it was regarding a very important topic. Whilst the majority would search through Google, YouTube and Facebook, some would also verify information through discussions with their friends. The clinics and the diaries also support this trend.

"Searching for the truth is not easy and it could be tiring, but I search on websites or ask friends, or even in daily conversations." - IDI

"Samira"

- **Single 18-year-old female from Damascus City IDP**
- **Elementary school education, family income of 40-60,000 but no personal income**
- **11 diary entries in 7 days**
- **2 shows per day on most days**
- **Watches most shows alone on her phone and most of the shows are cooking shows that she plans to share with others**
- **Watched Al Jazeera news with family**
- **Watched Bikasr alta' on Aj**
- **Summary: Young, uninterested in the broader world, not a heavy media consumer**

RQ2. What are the news and information needs of Syrian audiences?

Syrians need useful, relevant and regional information. The news that would have the most immediate impact on the living conditions of respondents was, naturally, referred to the most in terms of news and information needs. All participants (100%) from the IDIs stated that they need regional news; the most sought after topics were **political and security news** (incl. military operations), as well as economic news and news related to basic needs (food, water, shelter, etc)². These topics were also referred to by one respondent as ‘Syria reality news’. In the diaries, political news, satirical political shows, and news programming in general were the most consumed programming type comprising over 45% of the named programming.

Table 2 shows the topics most needed as well as the platforms on which they are consumed.

	TV	Radio	Print media	Video platforms	Social Media	News websites	Messaging apps
Regional news of the country	2.2	1.4	1.3	2.1	3.6	2.0	2.5
Regional News in the Middle East	2.3	1.5	1.3	2.2	3.5	2.2	2.2
International News worldwide	2.2	1.3	1.2	2.2	3.3	2.1	2.0
Politics	2.5	1.5	1.4	2.2	3.6	2.4	2.1
Health	2.5	1.1	0.9	2.3	4.0	2.0	2.4
Education	2.3	1.1	1.3	2.8	4.1	2.0	2.6
Basic needs: food, water and shelter	2.4	1.2	1.0	2.0	3.8	1.8	2.5
Public services	2.4	1.1	1.0	1.8	3.7	1.7	2.3
Society	2.1	1.1	1.0	2.1	4.0	2.2	2.5
Crime	2.2	1.0	1.0	2.2	4.0	2.1	1.9
Culture and art News	2.4	1.1	1.0	2.7	3.9	1.6	2.0
Economic news in the country	2.4	1.1	1.0	1.9	3.9	2.1	2.3
Science & Technology News	2.0	1.0	1.0	2.9	4.0	2.0	2.3
Family	1.6	1.1	1.0	2.2	4.6	1.6	4.2

Note: each media outlet was rated on a 5 point scale where 1 means “I don’t

² The need for economic news may be a trend given the recent combination of the Caesar sanctions, the economic collapse in Lebanon and the subsequent increase in inflation and volatility in the Syrian market and exchange rates of a depreciated Syrian pound.

need it at all” and 5 means “I need it a lot”, so the lower the average indicates the lowest need.

In the surveys, respondents’ news desires also included a significant need for regional news, along with education, health and crime-related information. Surveyed participants also preferred to obtain economic news on social media platforms the most, followed by TV. These data are also supported by the diaries. Diary participants identified regional news, along with education, health and crime-related information, basic needs and public services as their top choices for news.

In areas such as NES, in which there has been a relatively recent period without hostilities, the needs and desires are still linked to topics such as basic assistance, but are still somewhat different to those in NWS, notably the IDI living an IDP Camp. In Idlib, conflict related news was considered very important by this IDI given the immediate impact it would have on their insecure living situation. As one Media Professional observed, *“With the decrease in military escalation, the need for service and economic news increased, and the need for information to help Syrians in their difficult circumstances increased. The number of followers of social media pages talking about the harsh living conditions of the displaced people increased. The programs with the most followers are the historical, educational, political satirical programs, success stories coverage programs, as well as news of racist incidents.”*

Although health news was considered important, in the IDIs, **COVID-19 news** was mentioned by only 5 out of 22 respondents as news they were interested in or would seek information about. More than 70% of diary participants sought out news about COVID-19 from web and social media sources.

Diaspora respondents were more inclined to seek information pertaining to the **Syrian refugee situation**, as well as news about Syria both inside the country and, in one case, the international community’s stance on Syria.

Also evident from the surveys and IDI responses was an increased desire for both art and culture news, along with science and technology (on a scale of 1-5, accessing both these topics on social media was rated at 3.9 and 4.0 out of high of 5 in terms of needs). As one Media Professional stated, “people were only interested in political news but now they want to listen to music and watch series or follow the social news, or services news, or medical news because they are devastated, and that what is called “the humanitarian media”.

The **most-used platform** based on participants’ ratings (survey data) for the different news topics was social media, with an average rating of **3.9 out of 5**. The least-needed platform was identified as print media, with an average of **1.1**.³

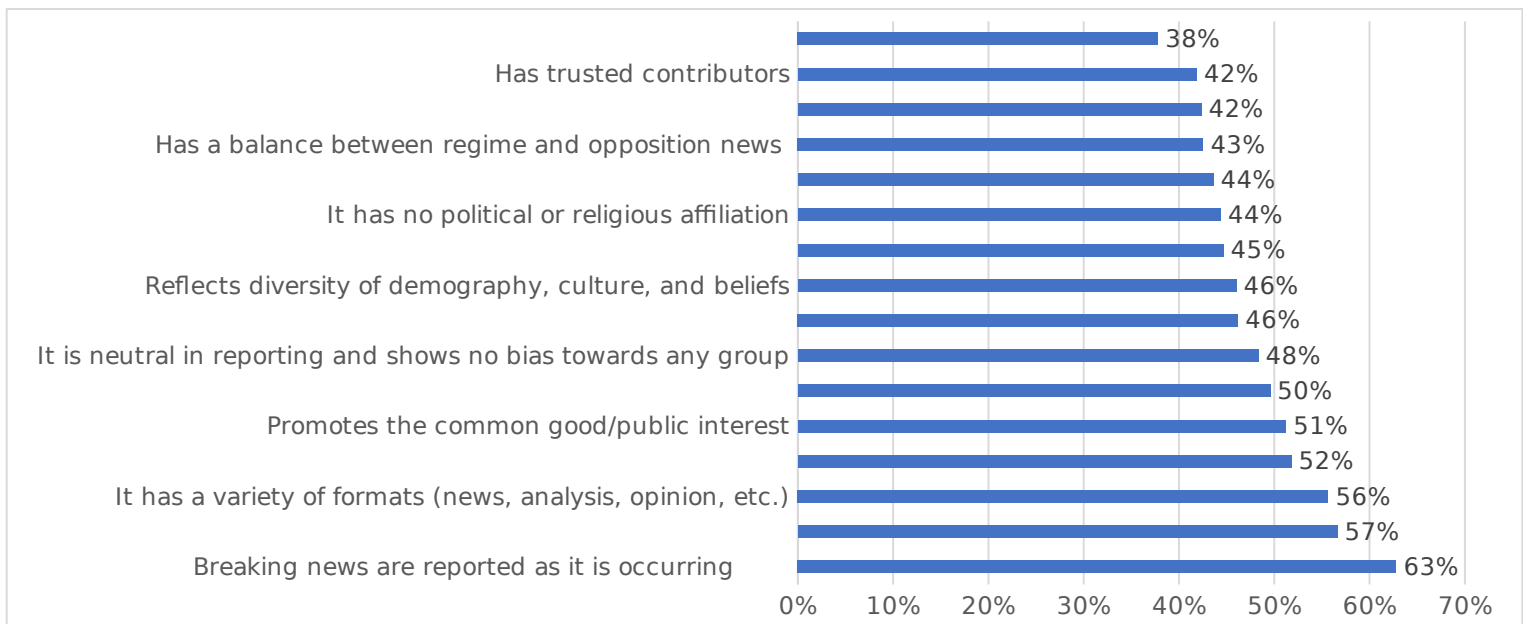
3 This is on a scale of 1-5 where 5 means needed a lot and 1 means not needed at all.

RQ3. What are the format and content preferences of Syrian audiences?

As mentioned in **RQ1**, it is clear that the social media phenomenon - as part of the broader use of digital platforms - is a significant driving force in the way that Syrians consume news. Respondents across the board confirmed that this is due to the accessibility of information and diversity of sources available on platforms such as Facebook; Syrians also want to find extra information due to a deeply-held scepticism of what they are being served by outlets across the Syrian media landscape. Many respondents in the clinics and diaries noted that they made choices to ensure “our news has a high credibility” by consulting multiple trusted outlets (diary participant).

When analysing the different digital platforms, the frequency of use of news websites is the least popular mode of news consumption online. This is perhaps a clear indicator of Syrian’s reluctance to dedicate too much of their time and energy engaging with singular sources when seeking a fuller picture of information.

Figure 1: survey respondents’ views on the most important aspect of a media outlet

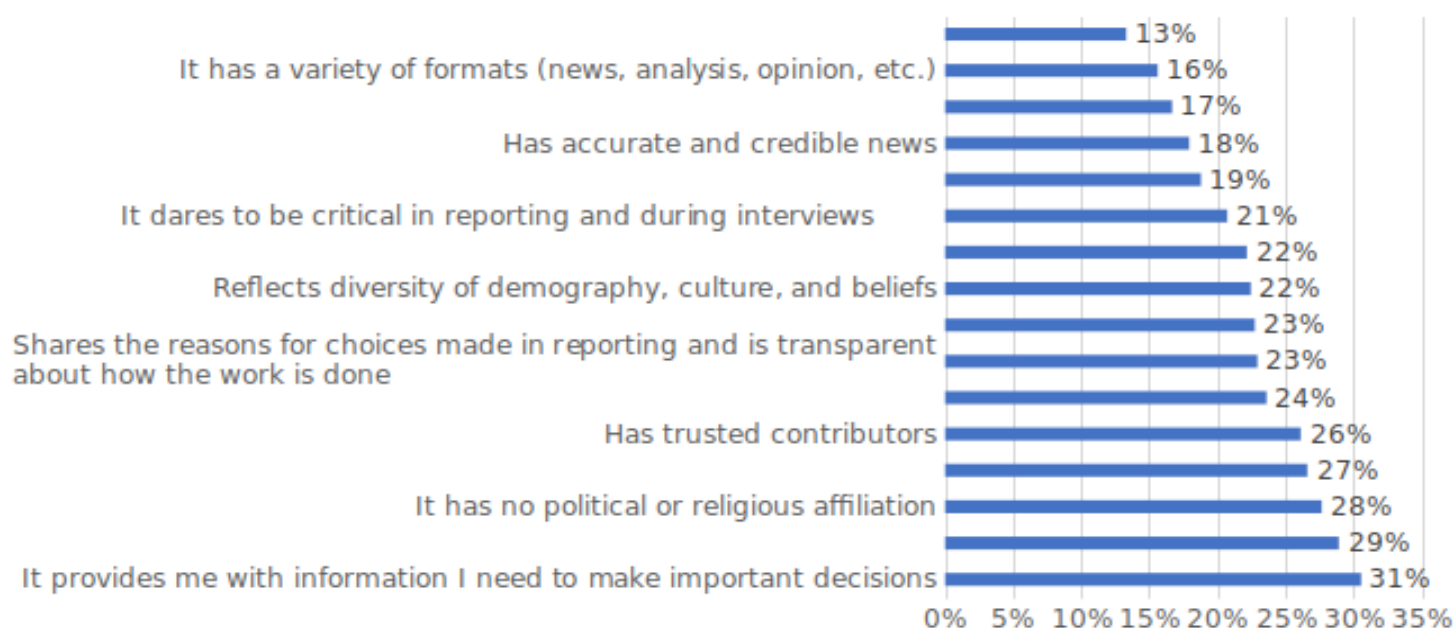


As evidenced by figure one above, 63% (651) of surveyed participants reported that the most important factor in picking a media outlet in Syria was that it report breaking news as it occurs. Over 57% of survey respondents also reported wanting accurate and credible news (587). The third important thing wanted in Syrian media outlets was having a variety of formats (news, analysis, opinion, etc.) 56% (577). ‘Breaking’ news being the number one need isn’t simply followed closely by ‘accurate’ and

credible' news in second place. The two are also mutually exclusive, interlocking needs that reflect the broader need for up-to-date information in fluid and unpredictable living circumstances.

Figure 2: survey respondents' views on the least important aspect of a media outlet

The least important thing to see in a media outlet in Syria



The three least important things for participants to see in a media outlet were as follows:

- An outlet that provides information that participants need to make important decisions (31%, 230)
 - o A forum for (community) discussion (29%, 300)
 - o The third least important thing in an outlet is to have political or religious affiliations (28%, 287).

While community discussions of news stories are generally considered important by Syrians, the fact that messaging apps and social media channels already accommodate these needs may be behind their lack of importance in this instance, coupled with a possible lack of willingness to share honest thoughts on the forum of a state-run or party-affiliated media outlet. As the situation in Syria evolves, it will be interesting to see if interest in public forums, especially in the areas of NWS and NES, increases.

“Um Amina”

- **50 years old, married, housewife, secondary school graduate, HH income of 85,000 Qamishli**
- **Mixes TV with social media for news and information, 13 programs**
- **Very diverse interests in economics, politics, society, crime and public services**
- **12 hours a day of media consumption, lots of Rodao news with family**
- **Summary: “Because many media outlets are biased towards certain groups and attack other groups, so we try to find alternative means that deliver the news with all credibility.” She is a seeker of credible news.**

RQ4. What online and offline sources do Syrian audiences use for their news and information needs?

“Syrian audiences are very flexible, they can accept a lot of things, of course as long as the technology allows them. I was astonished at how much they [Syrians] found solutions to get access to internet during the most difficult times. They cannot live without internet, they will find any way to find electricity, and even if they don’t have this at home, they should have internet somehow.” – Media Professional

Respondents were given a list of media outlets and asked to identify the top five that they use each week. When asked about the top 5 Syrian, pan-regional and international TV channels that survey participants use to consume news weekly, **Al Jazeera was endorsed by 26%** (273) of participants, followed by Al-Hadath with 25% (263), Al Arabiya with 25% (262), BBC Arabic with 17% (177), and finally France 24 Arabic with 16% (171) of participants. When divided by age, however, Al-Hadath is the **most popular with under-34s** (125), whereas Al-Jazeera remains most popular with over-34s (167).

When asked about the top 5 Syrian, pan-regional and international online media that participants use in their weekly news consumption, Facebook was endorsed by **87% (907)** of participants, followed by You Tube with 61% (631), **Einab Baladi was third** overall with 15% (151), Al Jazeera with 14% (146), and finally Syrian Human Rights Committee with 12% (125) of participants.

These patterns are also supported by the diaries. When it comes to news, there is not a specific channel that stands out as most popular across the diary locations. Al Jazeera appeared as the channel of choice in 10% of the programming choices. **Syria TV** (Turkey based), **Al-Arabia**, **Al-Jadeed**, **Sama**, **Lana**, and **Al-Hadath** accounted for 4% of the channels identified. Diary participants watched a variety of news channels. Dubai-based MBC,

and its affiliates, provided approximately 30% of the programs viewed. Most of the programs viewed during the 7-day diaries featured sports, comedy, action movies, and social/cultural topics.

A Media Professional told us that one of the best types of online sources today was not allied to a network or media outlet, but were those of individual bloggers *“and personal profiles of young people on social media who do this job instead of the media, who are their first duty to shed light on Syria’s suffering, but the media did not notice it.”*

Regarding the top 5 Syrian, pan-regional and international radio stations that participants use to consume news weekly, Sham FM was endorsed by 10 % (103) of participants, followed by **ARTA FM** with 7%(74), Al-Madina FM with 6% (151), Sawt El Shabab with 5% (55), and finally El Karma FM with 5% (52) of participants. On a regional level, **ARTA FM is the most popular** station in NES with 73 endorsements compared to Sham FM in second, with 34. In SCS, Sham FM (59) and Al Madina FM (50) are the top one and two favoured stations.

RQ5. What level of trust do Syrian audiences have in a range of online and offline news and information sources, including independent media?

*Media plays the role of **the fourth authority**, but in our region, it says what the funders want, but [if] it plays the observer role, it influences a lot of people, and can make a move of change by highlighting a specific issue so people can gather and take action.” - IDI*

The widespread lack of trust in Syrian media outlets and the content they produce is synonymous with the distinct lack of satisfaction Syrians have with the choices on offer inside the country. The desire of Syrians for a plurality of news sources is, to a great extent, a clear indication of their skepticism with the Syrian media landscape. Although older respondents in the IDIs were somewhat more likely than those under 34 to be more satisfied, they were also less likely to search for more information after consuming a news-piece. They were also more likely to consume their news through TV and, to a lesser extent, radio.

In terms of what was deemed ‘credible’, for international media outlets, **Al-Jazeera** came up the most among IDIs, along with the **BBC**, **Sky News** and **France 24**. Nevertheless, 17 out of 22 respondents (77%) were **dissatisfied with the media landscape in Syria**, most of them a great extent. Many of them referencing what they saw as agenda-driven reporting from outlets that were subservient to their funders and political parties in their regions.

While only 5 IDIs (23%) stated they were **satisfied with the media outlets in Syria**, three of these were heavily caveated, either by saying they were satisfied ‘to some extent’; that it met 80% of their needs; or that they still felt it wasn’t impartial enough. Though they mostly

appreciated the ease of access to information, some respondents were also cognisant of credibility issues with news on social media. In one example a respondent cited fake news on Facebook.

In the surveys, after ranking the top five TV channels consumed on a weekly basis, participants were asked to rate their trust in them on a scale from 1 to 5⁴. Respondents responses are as shown in the Table below. The most trusted TV channel was Al-Hadath, followed by Sky News Arabia, Al Arabiya, Al-Mayadeen, then, Al Jazeera. The most trusted online media was Facebook, followed by YouTube, Russia Today Arabia, Syrian Human Rights Committee, then Einab Baladi. The **most trusted radio station was ARTA FM**, followed by Monte Carlo Al Doualiya, Sham FM, then, El Karma FM.

“If we are talking about the match of the Syrian and international news on the social media of TV channels and websites, all of them have no credibility whatsoever, and they are only trying to gain more followers no matter what news they publish, whether it is true or not. But WhatsApp and Telegram groups give us 80 % honest news, and give us a good picture of what is happening in Syria and sometimes internationally” - IDI

Clinic participants rated stories by Einab al Baladi, Halab Today, France 24 Arabic and Syria Snack as impartial and transparent. Over 46% of the clinic participants identified the content from Einab Baladi as their favourite while 14% identified it as their least favourite content in the clinic. Over 28% of the clinic participants identified Halab Today as their favourite outlet while 10% identified it as their least favourite outlet in the viewing clinics.

Russia Today (RT) was the least liked of any outlet with over 35% saying that they did not like the content. State TV was also disliked with 21% stating that they did not like the content shown during the clinic.

RQ6. What do Syrian audiences perceive as independent media?

“Independent media is ‘reality delivered correctly and with no lies” - IDI

“Omar”

- **Aleppo, Male, 28, Married, Mid management, IDP, 40-60,000 SP, Grad Degree**
- **Consumes media alone, on a tablet, political comedy (Joe), political and economic news, MBC action movies**
- **One program per day, mostly political and social content**
- **Wants good stories about people and how events affect**

⁴ Where 5 means “trust it very much” and 1 means “don’t trust it at all”.

them

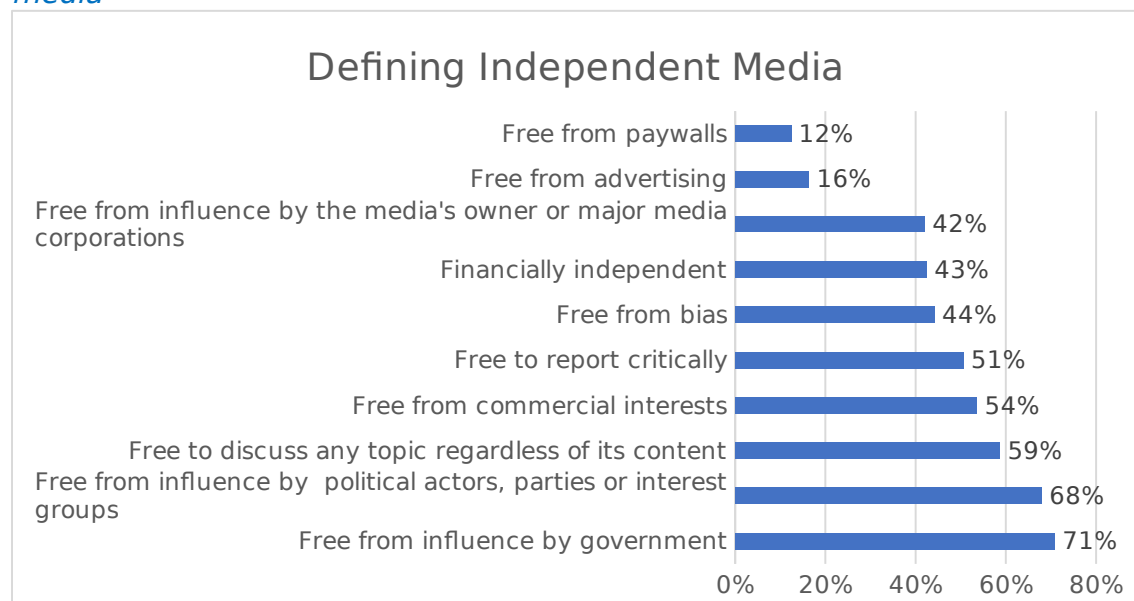
- **Social media 6 times a day for 6 hours a day**
- **Messaging apps more than 6 times a day, 5 hours a day**
- **Summary: Functional media user, diverse platforms, keeps private**
-

The one word which binds most respondents' definitions of independent media together is 'freedom'. Having autonomy from forces inside and outside the institution is key here; as is having the autonomy to produce a wide range of uncensored content with a critical eye.

Over 71% (735) of surveyed respondents define independent media as something that is free from the influence of the government, while 68% (705) define it as being free from influence by political actors, parties or interest groups. Over 59% (609) of respondents defined the free media by the ability to discuss any topic regardless of its content, while 54% (556) defined it to be free from commercial interests. One Media Professional also added that independent media should be *self-sufficient financially and otherwise and not politically framed and not governed by an extremist ideology.*"

Nearly 51% (525) of respondents mentioned that reporting critically makes a media outlet free, while less than 45% of participants see that media is considered free if 1) was free from bias (458 participants), 2) Financially independent (441 participants), 3) Free from influence by the media's owner or major media corporations (436 participants). Being free from advertising and free from paywalls, 16% (170) and 12% (129) were also selected.

Figure 3 shows the range of definitions among Syrians of independent media



Both age and gender disaggregation provided outcomes broadly similar to those that are shown in the table above. The top two definitions of independent media are the top two across all demographics considered here (age, gender, location, education). Even across education and location ranges (rural, urban and diaspora), ‘freedom from influence by government’ and ‘political actors, parties or interest groups’ were consistently top, while ‘freedom from bias’ and the ability to ‘report critically’ were selected as the next most-used definitions across rural, urban and diaspora settings, as well as a range of education levels (graduate, post-graduate, university but no degree).

The diary and clinic participants provided deep insights into what independent media means. Diary participants noted that independent media “plays a very important role and the main source to most of the information” and “media is the fourth power and it plays an obvious role in providing and delivering information.”

“Ahmad”

- **Male, 31, married, not working, finished grade 9, lives in Ar-Raqqa**
- **Heavy social media user for country, regional and international news.**
- **TV = 3 hours of movies on MBC, SM = 3 hours, Video Platforms = 2 hours, Apps = 3 hours**
- **Interests include politics, security health, basic needs, public services, crime, economics, and society**
- **Summary: Media is educational and it helps me know what is going on. Makes a conscious effort to know the truth.**

RQ7. What are the attitudes of Syrian audiences towards content that offers more partisan/unilateral stances or more pluralistic/middle-ground approaches to issues covered?

Syrians are extremely keen for non-partisan and nuanced information to be part of their daily media consumption, and are tired of partisan or unilateral content. Their stance towards biased content is that it keeps the country in a kind of political and sectarian decay, exacerbating divides among consumers in different territories of the country by promoting false and generalised narratives about different parts of society.

Clinic participants viewed 8 different news items produced by various Syrian and international media. Facilitators asked them questions about each piece to gain a sense of the credibility, usefulness of the news item. News items included written articles, news stories that were posted to YouTube, videos and radio stories. The clinic participants living in NWS rated stories by Einab al Baladi, Halab Today, France 24 Arabic and Syria Snack as impartial and transparent. Over 46% of the clinic participants

identified the content from Einab Baladi as their favorite content. RT Assad was the least liked of any outlet with over 35% saying that they did not like the content. State TV was also disliked with 21% stating that they did not like the content shown during the clinic.

In the SCS, the media preferences of clinic participants varied. A total of 13 people from SCS participated in the clinics. The sample stories by Einab al Baladi, Halab Today, France 24 Arabic and Syria Snack were rated as unbiased, and transparent by the clinic participants. Over 30 % of the clinic participants identified the content from “I am a Human Story” as their favorite and no one identified it as their least favorite content in the clinic.

Clinic participants were split on their assessment of RT and Mayadin with some stating that these outlets were biased and other saying that they had impartial content. Sana TV had the most positive statements related to credibility. It was also the most trusted. Syria Snack received positive comments as well for its story on corruption.

People were interested in the content reels that featured stories about life in Syria. Their answers suggest that they want news closer to home. People in NWS can point out pro regime sources and also can identify when media are pro opposition. Whereas some people identified Halab Today as operating from NWS, they did not say that it was biased or anti regime. Likewise, Rozana operates in NWS and many people identified it as pro opposition but it was not perceived to be very biased.

Mayadin was identified by many as supporting the Regime and it scored poorly on most questions about interest, balance and agendas. Sana was identified as representing the Regime and had one of the highest scores on the question: I know the agenda of this outlet.

Clinic participants in SCS had very different views on the international broadcasters. France24 Arabic was scored as the best media outlet in the clinics in NWS. People wanted to consume more of its content, believed it was balanced and trustworthy. RT, on the other hand, had many people acknowledging that it followed an agenda and had partisan content.

One in-depth interviewee noted a range of conflicts topics that arose from Syrian media coverage being a major issue for them: *“whether it is sectarian problems or fallacies related to political solutions and constant incitement by both parties, then in my opinion, spreading awareness and peace starts from the same point, awareness about sectarian problems and beliefs, ideas and political. For individuals in a civilized way that starts with the media. The most advanced civilized, economic and scientific countries have intellectual, sectarian, religious and political pluralism, but this awareness has been present since childhood and through the media on a permanent and continuous basis.”* Therefore, sustained pluralistic approaches from media outlets would represent, for this respondent, a gateway towards democratic growth.

Another Media Professional describes the coverage noted above as *“social diseases”* that needs to be addressed by a more robust and independent media that they see as the *“bridge and connection line among people.”*

Overall, the attitude towards middle-ground approaches, in the limited space they are accessible, is wholly positive; one of the reasons

international outlets like Al-Jazeera feature so highly in respondent's favoured sources is due to both its reputation as credible and the fact that it operates freely outside of Syria.

Moreover, Syrians not only want pluralistic approaches to news coverage, but **humanistic** approaches too. One Media Professional talked about A Human Story, an outlet based in France, which has been successful in its approach by framing its content through the individual stories of those at the heart of every day Syrian issues. This has been identified in particular as an unmet need among younger Syrian audiences; a vacuum which independent outlets are capable of filling.

"All media sources are important to me if they have a special story or a video or a show about the humanitarian situation, to raise awareness related to rights and duties towards the humans wherever they are, I follow them in my region to see the cases and to know about activities as well." - IDI

RQ8. How do Syrian audiences value independent media and what role does it play in their daily lives?

"The media has a role in getting Syrians out of their parties by focusing on the common space that binds them together" - IDI

Syrians put a great deal of emphasis on the importance and value of independent media; this is typified in their approach to checking multiple sources and not taking one story from a single outlet at face value. However, while it is clear from surveys, diaries and IDIs that the media in general plays a significant role in peoples' daily lives, the widespread lack of trust means that the majority perceptions are of a landscape in which there are perceptions of a vacuum of independent coverage.

Diary participants noted that independent media has the potential to play an important role in their lives. It "is the engine that moves everything" and it is an important source of information. It has "an educational role" and "can bring society together again.

Most IDI respondents, despite their concerns with the media landscape in Syria, also think that independent media would play more of an important role in their daily life if the political space existed for it to flourish. One IDI stated that the media has a very big impact on society and therefore peacebuilding, but wanted to see more attempts a fostering dialogue through bringing "*decision-makers*" such as political leaders together in forums, as well as creating "*a coalition of programs*" whose goal is to draw together the various opposing parties in the country" and look for similarities among the differences through which to effectively use as a stepping stone towards more productive engagement.

Not only do the majority of Syrians believe the media is important to maintaining the balance in society, and raising awareness of key events; in

their view it can also bring peace and help to unify the Syrian people across multiple dividing lines. Clinic participants confirmed this finding.

This view is complemented by one Syrian Media Professional, who believes that ultimately, while the political situation has made the biggest impact on the disintegration of the Syrian identity, if media and politics can eventually work together, then significant change will occur in support peaceful change: *“Media has the biggest influence on the public opinion, and with the help of the supporting institutions, free media will be able to pass all obstacles and we will see a better result.”*

“Media is one of the most powerful tools in effecting the audience and it plays a big role in society, so [if I was in charge of an outlet] the staff would be highly qualified and well trained. The content would be clear and with high credibility. It would meet the society’s needs, taking into account international human rights standards, the messages would be meaningful and help in the peacebuilding of the society and to stand against the wrong social habits and to highlight the important issues.” - IDI

RQ9. How have media development interventions helped strengthen the independent media sector and supported cohesion, dialogue and peace-building amongst Syrian audiences?

“It [independent media] should stand against fake news, hate speech, and social split. The lack of opportunities to express and resolve our disagreements, has caused violence. Talking in the right way and choosing the right words carefully makes a difference.” - MP

While Media Professionals agree that funding and training from media develop organisations has been conducive to strengthening independent media, it was also clarified by one interviewee that these interventions are still nascent, and have a long way to go.

One respondent stated that they have noticed shows on social media which are related to peacebuilding, in the form of cultural exchanges among different societies, and felt that more needed to be done in order for Syrians to better understand the traditions and cultures in areas that are less known. Among most interviewees, however, it is felt that there is a huge gap in the landscape that needs filling with accurate and credible coverage and stories that can teach peace coexistence among diverse groups.

One Media Professional believes that there is a great opportunity for outlets to better collaborate and produce content with everyday people in their communities, because a lot of the qualities needed to improve social cohesion and dialogue are already pre-existent: *“I remember that I attended a remote training for a group of Arab women on conflict resolution, and I noticed that the Syrian participants, even though they are*

working mothers, but they expressed their desire to improve their knowledge of governance and conflict resolution so that they could teach their children and build a strong generation. Their discussion was very distinct, and it was revealed through the course that as Syrian women, they knew about governance and conflict resolution before by instinct, and they use it in their daily lives.”

*“The media in NES, they enjoy the best relationship with their audience, because of the amount of service related stories. If you look for example at **Arta FM**, they do an amazing job in covering the service related stories every day, and they became a source of daily life, like a lifeline for people living in the areas, because without listening or reading what Arta is doing, they will be disconnected with reality.”- MP*

RQ10. How has the support of Free Press Unlimited contributed to a strengthened independent media sector?

*“Recently there was a power cut in Hasakeh for a month or so, which resulted into a water shortage as well because some water pumping stations are only working with electricity. So people in Hasakeh lived for three weeks without power, and without water. The reality I found only in **Einab Baladi’s** coverage - they made a huge investigative story, soundbites with Kurdish, soundbites with people who are working in NWS in Idlib.” - MP*

The clearest indicator of FPU’s contribution to the independent media sector is the popularity and quality of their partners’ content in the Syrian media landscape, notably that of Einab Baladi, Rozana and ARTA FM. Of equal importance is the code of ethics through which FPU operates as a partner. As one Media Professional noted, FPU does not interfere with the editorial framework of their partners; they allow them to build their own content free from outside influence.

Another Media Professional noted that FPU’s guarantee of annual funding is extremely positive as it enables their partners more security and time to build their outlets. It is also said to stand in contrast to other media development entities that more often give their partners three to six months’ worth of funding at best.

These views from Syrian Media Professionals are corroborated by data in from survey questionnaires. ARTA FM and Einab Baladi were mentioned as being very popular; ARTA FM was also shown to be one of the **most trusted radio stations** amongst surveyed participants. Both are long term partnering with FPU. The notion of trust is an intangible, let alone in conflict-affected environments where the social fabric has been decimated; in this case, it can be lost very easily if standards slip. If trust between consumer and media outlet can be maintained in the long-term, then it will be a further positive indication of FPU’s support; not only in strengthening independent media, but in facilitating a healthier and stronger dynamic, underpinned by quality content, between Syrian audiences and media institutions.

“The media’s role now is very important to remind Syrians that they don’t belong to one culture, it is multicultural. And that Syrian culture is diversified by nature.” – MP

6. Recommendations and Lessons Learned

- FPU partners should continue to create content that is free from political partisanship and interference
- Partners should create news products that provide the full picture of news and events in Syria
- Partners should take advantage of the preference for digital platforms and create content that is easily shared across platforms
- Partners should build on the massive and increasing use of messages apps to experiment with additional (new) content distribution strategies
- Syrian consumption habits change if they begin to notice too much perceived bias in outlets
- Encourage more long-term co-productions among partners that focus on non-political stories, including but not limited to stories that reference historical examples of co-existence and pluralism
- Human-centred content about issues closer to home is crucial to igniting interest. This content allows Syrians to corroborate their own lived experiences through others in different parts of the country, reducing the sense of “otherness” and building identification among Syrians
- Reducing some of the administrative tasks on partners would enable them to focus more time on content production.
- Increased digitization of radio stations and social media presence would improve ARTA FM’s reach beyond NE Syria.

6.1 Lessons Learned to Inform Future Research Studies

- Research needs to go deep rather than broad. Spreading a few dozen Diaries, Clinics and In-depth Interviews across seven locations made the ability to identify trends and differences across regions more challenging, as the participant numbers in each area were too small. In the future, we recommend focussing in-depth content around one specific location or ‘hub’, in order to extract more compelling data that has a distinctly regional focus.
- Purposive, as well as randomised, sampling may yield even richer overall content.
- Having access to media partners’ reports, audience data, etc for the desk review process could have helped shape a better understanding of their current reach and progress made, which could then have been triangulated against our own research findings for further clarity.

- While it is important for media outlets to criticise local authorities, in NE Syria, more space could be given so that local representatives have a voice and become more included in the dialogue.
- *One MP noted that the attention and budget for training should be equally divided between technical training, production training and ethical and editorial training. Because without ethical and editorial training you cannot reach anywhere.*

7. Conclusions

There are several important findings from this audience research study which can be taken into consideration by FPU and their partners are part of their future media content creation.

1. There is a **similar train of thought** among Syrians, from Media Professionals to audiences across a range of demographics, when it comes to how they see independent media. Freedom from political partisanship and interference is particularly crucial here. In terms of actual content, focussing on the human experience, allied with a variety of opinions and voices will help FPU partners grow credibility among their audience.
2. While the signs from this research study are promising for the future of independent media, there is still a lot to do to convince a deeply sceptical public that the type of consistent coverage they desire exists already in the Syrian media landscape. The ultimate test of how strong independent media are in Syria will be the positive engagement and feedback from conscious and informed consumers desperate for credible news. The more that a sustained, loyal base of listeners, readers and viewers grows among FPU's partners across the different hubs, the more effective their support will have proven to be.
3. Using Einab Baladi as an example, one MP noted that they were distinctly more courageous in how they took a balanced view on the Turkish role in Syria, despite operating from Istanbul. Coverage such as theirs should be seen as the bar for other outlets to aspire towards. While editors are clearly compromised by external influence, it was also made clear that they can often be **compromised by their own attempts to second-guess the authorities** and what they may want to see. Putting the audience in the ultimate role of the authority figure could yield bolder and more expansive coverage.
4. There is a **deep and rich tapestry of historical content** from the region waiting to be utilised for media productions, from documentary to podcasts. By intentionally telling the story of historical co-existence and collaboration between different

groups, consumers will be better equipped to contextualise and dismiss divisive content and misinformation when it is presented to them. Content designed to help foster reconciliation and peaceful coexistence should embrace the complexity of identity-making in the region and content creators should emphasize shared experience and common identity elements in their programming. Ultimately, the reconstruction of a more homogenous Syrian identity that still recognises the plurality of cultures in Syria, can be shaped greatly through the way independent media historicizes the complexities of the region.

5. The desire for multiple news options online means the use of digital tools will continue to outstrip more traditional methods. This is however largely due to Syrians deep mistrust of Syrian news. Therefore, the higher the levels of trust that can be built with an outlet, the least likely consumers will be to search excessively for extra voices in order to see the bigger picture. The more viewpoints that are included in a single programme, the more accessible this will become to consumers. Nuanced and informed news begets a conscious and informed Syrian audience.
6. There is a major interest in Syrian news, notably security, political and economic news but also culture and the arts. However is not merely the topics they are interested in, but a more balanced, humanistic approach to how the news is delivered. This is where popular individual bloggers and vloggers such as I Am A Human Story seem to currently have an advantage on other media outlets. This dynamic can be shifted but it needs a more concerted effort to focus on areas such as this where individual content producers are having success with their audiences.

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Contact: researchsyria@freepressunlimited.org



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