



Syria Audience Research 2018

Table of Contents

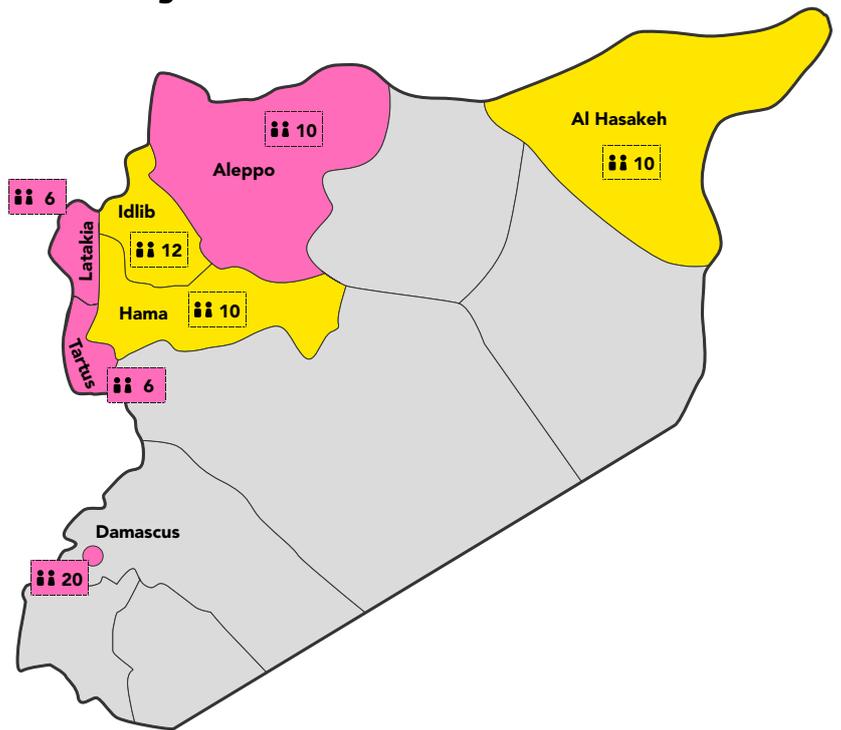
Areas covered by the research agencies	3
Executive summary	4
Introduction	5
Context of the research	7
Methodology	6
Findings	8
Conclusion	15
Colophon	16

Areas covered by the research agencies

TOTAL NUMBER OF RESPONDENTS: 80

- Conflict Management Consulting
 - Ipsos (Fieldwork with third party subcontractor)
 - Conflict Management Consulting (Turkey)
- ☺☺ ## Number of respondents per region

Syria



Turkey



Executive summary

Syrians want independent and credible news, regardless of their political affiliation. Good news for Syrian independent media, who can reach out to a potentially large untapped audience. To achieve this goal, these media organisations need the support of audiences, donors and the development community.

The unanimous wish for independent media among Syrians was shown in a qualitative audience research. The study substantiates the mission of Free Press Unlimited, who conducted the research. This mission is to support emerging media organisations to become vital independent news sources for Syrian audiences. However, while the professionalism of these outlets is growing – which is reflected in the quality of the news that they publish – their audience remains relatively small. Meanwhile, Syria is becoming increasingly media dark. The growth of territorial control by the Assad government goes hand in hand with the growth of media control. It is therefore continually more important to support independent Syrian media in delivering quality content to audiences in dark-media areas.

This research is unique in its kind. It was designed to obtain in-depth knowledge about Syrian audiences and their perceptions about media outlets to which Syrians are exposed in their daily life. Responses were collected from citizens in seven different regions, as well as the Syrian diaspora in Turkey. Free Press Unlimited worked together with two different research agencies, which together provided access to different audiences across disparate socio-political areas of Syria. The agencies collected data in

these different areas, using the same research methodology and instruments. In addition to being interviewed, the respondents were asked to give an answer in response to statements, after being exposed to actual journalistic products. These products were produced by media outlets with different visions and agendas.

The findings of this research show that Syrians, regardless of the party in power in the area in which they reside, have a shared definition of independent media. They define it as “unbiased”, “not favouring any side”, and “credible”. Syrian audiences involved in the research emerge as astute consumers who expect that the media deliver balanced reporting. In addition, media are expected to play a positive and constructive role in society. According to the Syrians interviewed, this is particularly needed regarding conflict resolution and accountability of the political actors. Moreover, Syrian (both audiences and journalists) express a need not only for crisis-related news, but also stories related to everyday life. Syrian media professionals have a long way to go to fulfil the high expectations Syrians have. From the in-depth interviews it is apparent that currently Syrians are very critical – and even negative – about the role and content of media organisations.

Annexed to this report are recommendations specifically developed for: (1) Syrian (independent) media organisations; (2) the international development community, including donors, and (3) organisations and institutions interested in conducting similar or follow-up (audience) research in conflict areas.

Introduction

Syrians have expectations from media that are not met by the media that are supposed to serve them. Much of the news that reaches Syrians is produced by partisan media outlets. The few independent media organisations serving the Syrian market today operate in the dark. They have very little data available on their (potential) audiences and their wishes. Serving a client without knowing who that client is exactly, is complicated for any organisation. With the aim to offer independent Syrian media the required data to fulfil the media needs of Syrians, Free Press Unlimited conducted qualitative audience research in Syria.

People deserve to know: this is the vision of Free Press Unlimited. Particularly in contexts of conflict and oppression – which includes Syria – people need reliable information to ensure their safety and livelihood. Free Press Unlimited conveys its mission for Syria by supporting the independent media sector. This research fulfils an important purpose: it presents findings that can inform the strategy of independent media organisations towards better serving and increasing their audiences. It also offers inspiration to more partisan organisations, attending to Syrians, to better adhere to the standards of independent journalism.

This research was carried out in the summer of 2018 and brings independent media professionals a perspective on both their current audience and untapped audience groups. Syria today is a polarised country: the conflict has caused a

split in geographical areas, and with that in the political affiliation and mindset of the people. People, including media professionals, tend to think in terms of 'the other'. This is both reflected and reproduced in the media sector and their content. Independent media¹ generally reach a small number of mainly opposition-oriented Syrian audiences. Their 'other' is the government-oriented audience.

Considering this context, there are several relevant research questions that this report answers: is there an audience for independent media content? If that is the case, what can independent media do to expand their audiences – in line with audience expectations? How is independent media content perceived by audiences, when compared to partisan media items? Does the audiences' idea of independent media correspond with their actual perception of independent media products?

Free Press Unlimited designed research instruments suitable to understand both the more abstract beliefs and empirical evaluations of Syrians with regard to media. Respondents were recruited from seven regions in Syria and from diaspora in Turkey. Eighty audience members were exposed to different media content in audience panels. The content was produced by partisan and independent media organisations, representing the currently available media on the Syrian market. Forty of the respondents were subsequently interviewed. This approach allowed for a consistency assessment of responses given by the respondents for the two different research methods.

1. Independent media are media that are able to set their own editorial line, without influence from governments, political parties or other interest groups. They can be financially independent through business models that include paying subscribers and advertisers. In the Syrian context however such business models are not profitable. In practice therefore, independent Syrian media organisations receive funding from development organisations. Despite their independence, and particularly in conflict situations, independent media organisations can exhibit a leaning towards one political perspective. In the case of Syria, independent media tend to lean towards the side of the political opposition.

This report starts by introducing the context of this research, and the position of this research in Free Press Unlimited's Syria programme. Subsequently, the summary of the research methodology, including a description of the sample and media content, is outlined. This is followed by the findings. The conclusion section provides the implications of this research. Attached to this report is a full methodology and technical report. Also attached are fact sheets for each piece of content from the audience panel, which include a further analysis of the audience evaluations of the content. Finally, lists with recommendations are attached, which are directed to different stakeholders: Syrian media professionals, the development community, and researchers.

Disclaimer

This research in Syria took place under extremely difficult circumstances. Normal sampling procedures could not be used; this means that the achieved sample is not reliably representative. The research does however provide a glimpse into the media situation in a war-torn country. There are some other problems with the research. There were factors in the way that some questions were put that make the responses given difficult to analyse because of ambiguities arising from those questions. An example is that the data do not tell us clearly or unambiguously which media are used most frequently, and which particular media "brands" are used the most. These will be included in future audience research in the Syrian context and beyond.

The data do however give us several important and reliable insights into media use in a more general way. They show that online and digital media are widely used, especially through mobile phones. They show that Syrians, despite the upheavals of war and instability, have widespread access to all media: printed press, radio, TV, both terrestrial and satellite, and online sources including social media.

Context of the research

To fully understand the implications of this study's findings, it is imperative to have contextual knowledge of the media operating in the Syrian market. Syria today consists, in essence, of three different media landscapes. The Syrian conflict - which started in 2011 - has divided the country into government-held, opposition-controlled and Kurdish-majority areas. In these areas the authorities in control would determine the dominant political view. By practising different degrees of media control, this view was reproduced in the media content delivered to citizens in this area. As a result, audiences have developed differences in media consumption and preferences depending on the area in which they live.²

The media environment in Syria's government-held areas is a closed environment. Freedom House reported in 2018 that both journalists and citizens "who criticize the state face censorship, detention, torture and death in custody". This closed media environment has a long history in Syria. Even before the uprising, Syrian media were largely in the hands of the government or their direct affiliates. Their function then was to "guide the public opinion" towards supporting the government's activities. Many of these media are still active today. In areas under the control of the Syrian government the media consumption of Syrians is still very much restricted to these media organisations. For the most part, these media houses reinforce the regime's narrative and represent the 'mood' of the communities that support the government.

Syrians outside of government-controlled areas, inside and outside Syria, have access to a more diverse media landscape. In this landscape the average Syrian is able to consume Syrian (government) media, pan-Arab media, and

independent media. Especially the pan-Arab media enjoy a high consumption rate among Syrians. Generally, pan-Arab media show a clear pro- or anti-government stance. These media organisations are therefore referred to as partisan media. Generally, Syrian outlets also tend to be partisan. These outlets are "under heavy pressure to support the dominant militant faction in the area".³

Independent media organisations stand out in their delivery of non-biased information to Syrian citizens. They are able to reach a limited amount of people inside Syria. Generally, these independent media lean towards the opposition in Syria, and are also consumed by a more opposition-oriented audience. Growing an audience has been difficult for independent media, because they face many challenges. The main challenge is the media control practiced by the varying authorities inside Syria. This has forced independent media into exile. Being legally and physically separated from their audience puts these organisations at risk of losing their direct link to realities on the ground.

The main goal of this audience research is to contribute to filling the information gap of independent media in relation to Syrian audiences, regardless of their geographical/political location. As such Free Press Unlimited's Syria programme acts in line with the organisation's vision: people deserve to know. To better understand the information needs of Syrians, one of the activities of the programme is to collect relevant data on Syrian audiences. With this information Free Press Unlimited is able to support independent media in serving their audiences better.

2. Trombetta et al, 2019; Issa, 2016.

3. Freedom of the World Report 2018, Freedom House

Methodology

This research was conducted uniquely by two separate research agencies under extensive coordination from Free Press Unlimited.⁴ As a consequence, the research matches the information needs of Free Press Unlimited’s partners. Also, by involving two different agencies, this research is drawn from data collected in areas that could otherwise be difficult to access. Considering the complexity of the research it also proved beneficial to work with two organizations that could draw from different approaches and backgrounds. While Ipsos (fieldwork with third party subcontractor) had previously conducted research in Syria, Conflict Management Consulting (CMC) had experience working with the media development sector. Free Press Unlimited was involved in all the stages of the research development; during the research design and instrument development phase, the piloting phase and at the stage of data collection and data analysis.

Free Press Unlimited chose to conduct qualitative audience research to find answers to the research questions in the words of Syrians themselves. The research consisted of three different, connected, components.⁵ First, basic data of the respondents

was collected through recruitment questionnaires. Then, eighty respondents were included in audience panels. In these panels participants were shown seven journalistic items (see Text Box: Audience panel content).⁶ Forty out of the eighty audience panel respondents were selected for thematic in-depth interviews.⁷ These interviews served to gain a deeper insight and enrich the data collected in the audience panel.

This report has several limitations that need to be mentioned. They result from the general set-up of this research and the security situation in Syria. Being a qualitative study, the results of the research are not representative.⁸ Also, the safety situation and levels of oppression differ depending on the area in which a respondent resides. This could have had an impact on the openness of the respondents in this research. There were however no indications in the answers of the participant that indicated an inhibition to talking. Despite researchers in the government-controlled areas indeed indicating a level of discomfort among the research respondents.

The full methodology and technical report can be found in annex 2.

Locations	Party in control of location (summer 2018)	# audience panel	# in-depth interviews
Al Hasakeh Governorate	Opposition	10	5
Hama Governorate	Opposition	10	5
Idlib Governorate	Opposition	12	6
Damascus Governorate	Government	20	11
Aleppo Governorate	Government	10	3
Latakia Governorate	Government	6	4
Tartus Governorate	Government	4	2
Turkey		8	4

Table: respondents per location

Audience panel content

The respondents in this research were shown content from a representative sample of media organisations reporting on Syria. In this sample three main groups are represented: independent media, pro-government partisan media and pro-opposition partisan media. Included are, where possible, both domestic (Syrian) and international media organisations as well as different types of media (online, television and radio).

In annex 3 of this report you can find detailed profiles of the media organisations, information about the content selected, and the audience panel findings per item.

Pro-government partisan media

Partisan media are media that are (allegedly) funded by a government, political party or other interest group. The pro-government partisan media reporting about Syria have a clear affiliation to the Syrian government. In this study four different media organisations belong to this group. These outlets are either directly linked to the Syrian government, or directly linked to Iran or Russia, which are both allies of the Syrian government.

Media organisations from this category, whose content was included in the audience panel, were: Al Manar, SAMA TV and Russia Today.

Pro-opposition partisan media

The pro-opposition partisan media reporting about Syria have a clear affiliation to the Syrian opposition. These media include organisations funded by governments or people that oppose the Syrian government.

Media organisations from this category, whose content was included in the audience panel, were: Zamen al Wasl, Orient TV, Al Arabiyya, Al Sharq al Awsat, and Al Jazeera.

Independent media

Independent media are media that are able to set their own editorial line, without influence from governments, political parties or other interest groups. Often independent media are financially independent through business models that include paying subscribers and advertisers. In the Syrian context however such business models are not profitable. In practice therefore independent Syrian media organisations receive funding from development organisations.

Despite their independence, and particularly in conflict situations, independent media organisations can exhibit a leaning towards one political perspective. In the case of Syria, independent media tend to lean towards the side of the political opposition.

Media organisations from this category, whose content was included in the audience panel, were: ARTA, I am a Human Story, Welat FM, ANA Press, Syrian Snack, Halab Today.

4. Ipsos (Fieldwork with third party subcontractor) and Conflict Management Consulting.
5. Details of the methodology, as well as a technical report, are available in annex (2).
6. Two reels with seven items each were developed. In both reels a representative selection of journalistic products were shown. This selection was based on the outlet that produced the item, combined with the type of media, and characteristics of the content
7. Media professionals were also interviewed in this research. The findings of this research group are not presented in this report.
8. A profile of the research respondents can be found in Text Box: Respondent profile(s)

Findings

The study results demonstrate a few key findings. Syrians:

- value unbiased, credible and well-sourced media content
- prefer to consume news from an independent media source
- are negative about the media currently serving the Syrian market, both in terms of the role they play as well as the quality of content they deliver
- have high expectations of media and media content
- are critical media users and display advanced critical media literacy skills

Below, these findings are further elaborated. The tables show consistency in the merging of the data collected through the audience panels with those collected through interviews. There are however a few points that are relevant when reading the findings below.

Firstly, the audience panel data confirm that, in general, respondents' political preferences conform to the dominant political view in the geopolitical area in which they reside. In this report, therefore, we refer to opposition-oriented and government-oriented audiences. The findings that refer to an opposition-oriented audience correspond to data collected in Hama, Idlib, Qamishli and from respondents in diaspora. The government-oriented audience data is collected in Damascus, Latakia, Tartus and Aleppo.

Secondly, there are some consistent differences in the responses of opposition versus government-oriented audiences in statements from the audience panel. The findings below have been corrected for these differences. They are:

Government-oriented audiences were, in general, significantly more negative about the content they were exposed to. This finding stands, even after correcting for media organisations with the

same political preference as the respondents. This seems to indicate that government-oriented audiences are more frustrated and sceptical about the media.

Government-oriented respondents were also more confident in providing answers to the statements. These respondents expressed their agreement or disagreement more strongly. Also, fewer "I don't know" answers were recorded.

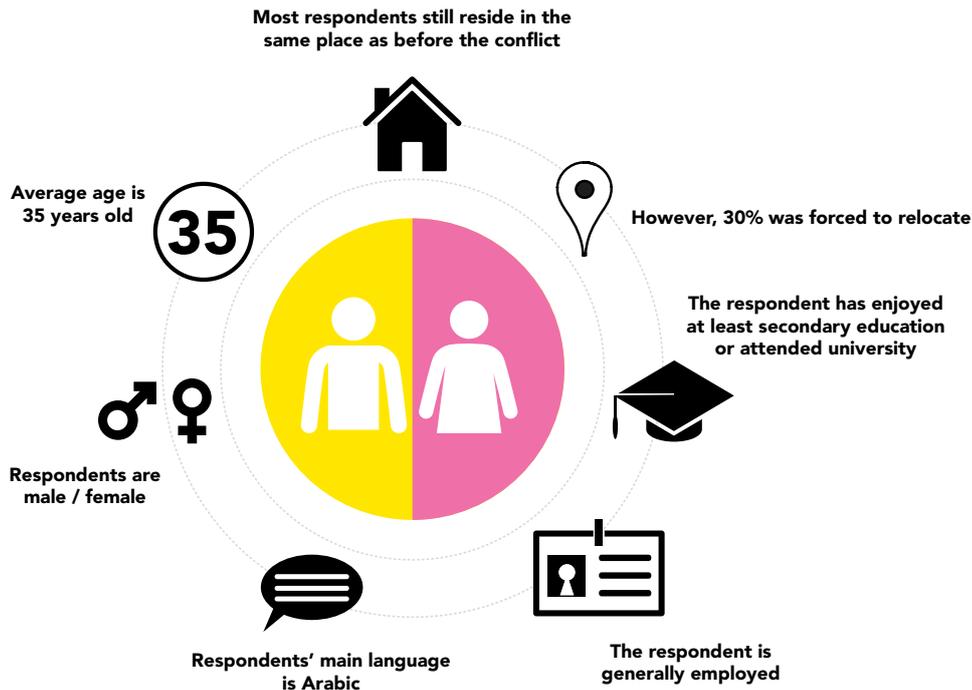
Below, the findings of this research are given in detail. They seek to answer the research questions: Is there an audience for independent media content? What do audiences expect from media? Is the image that audiences present consistent? Is what they say in line with how they have evaluated actual journalistic items in the audience panel?

Syrians want and value independent media. The Syrians included in this research share a definition of independent media. They refer to independence of the media with notions such as "not affiliated with any political party", "impartial", and "unbiased". This conceptualisation is consistent throughout the study with one exception: government-oriented respondents also mention that media do need to operate within a pre-set framework, i.e. to be censored to some extent.

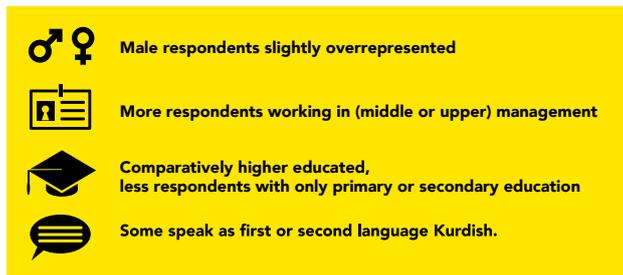
Government-oriented audience members are more negative about media content

An example is the responses to the statement "would you be interested in consuming this item if you would have come across it in your daily life". The government-oriented respondents collated data show a range of 0 – 33,3% positive responses. For the opposition-oriented audience this range was much wider: 11 – 83%.

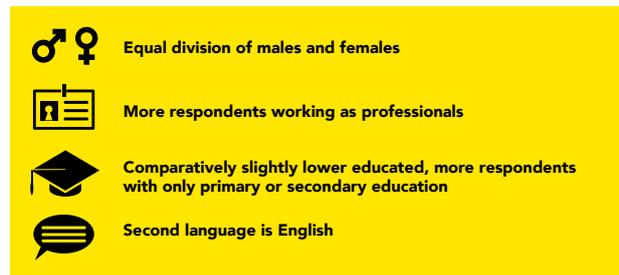
Respondents' profile



Opposition-oriented audience



Government-oriented audience



Political preferences reflected in audience panel data

An example of the audience panel data that shows a clear division between respondents with different political preferences. Which item is **considered balanced** depends on the geopolitical area in which the respondent resides. The most striking differences are:

Outlet	Opposition-oriented audience	Government-oriented audience
SAMA TV	5%	29%
Russia Today	14%	53%
Al Jazeera	57%	5%
Al Arabiyya	21%	9%

Table: % of respondents who considered the item balanced

Independent media content is more balanced

Respondents consistently rated the balance exhibited in the items of independent media higher than in those of partisan media. Noticeably, while there are slight differences between the respondent groups, a majority are negative about the balance of pro-government items. In addition, all answers indicate that the audience members are considerably more confident about knowing the position of partisan media, rather than independent media. This indicates an increased neutrality of reporting by these independent organisations. Interestingly, all respondents were most confident in their statement that they 'know the position of the outlet or journalist producing the item' in the case of pro-government media compared to pro-opposition or independent media. This implies that pro-government media are more overtly biased in their reporting.

There is almost unanimous agreement among the interviewees that independent media currently do not exist in Syria. The audience panel results largely confirm this belief, albeit with slight nuances. In the panel, respondents were asked to assess the independence of the outlet whose content was shown. A majority agreed that partisan pro-government media were not independent. Independent media were more difficult to evaluate for respondents; over half of the respondents answered that they could not evaluate the content. It is possible that this finding is related to the familiarity of the respondents with these independent media outlets. Or rather vice versa: that partisan media content was assessed based on assumptions the respondents have about these outlets. Opposition-oriented audience

members exhibited inconsistency with their belief that there are no independent media in Syria. They considered pro-opposition partisan media generally independent.

Nevertheless, independent media content is valued relatively highly among both audience groups. Independent media content was assessed less negatively by the respondents than the partisan media content. Also, both audience groups valued the independent content only slightly less positively than their own preferred partisan-media group.

Often, Syrians connect independent media to concepts of balance, credibility and neutrality. These concepts are considered important indicators of independent media content. In the audience panel, respondents were given statements about these concepts, in particular, balance and neutrality (the latter is assessed with the statement: "I know the position of the journalist or media organisation who produced this item"). The data collected on these statements confirm again that independent media content is indeed valued by Syrians.

Syrian audiences interviewed in regime and opposition-controlled areas are negative about the role and content of media

Syrians speak in strong terms about the role that the media plays in their country. Many of them reference that media present a polarising world view:

"The current situation is [that] media outlets, whether in regime or opposition held areas are fuelling the conflict. They produce lies and increase sectarian and hatred speech through the videos and images of the killings. The media outlets should focus on humanitarian principles."

A male respondent from Hama

Respondents, furthermore, say that politics currently influences the media. They consider this a negative development. Government-oriented audiences link this to the fact that many media are not independent. Instead, these media are used as a propaganda channel by the government. One respondent gave as an example that if the currency drops – leading to an increase of prices – the government communicates through the media that this will be positive for the Syrian citizens. Opposition-oriented interviewees express more hope towards the media's influence on politics: recognising the current negative trend, these respondents also acknowledge some good examples of accountability.

There is a difference among the respondents in terms of their satisfaction with the news available to them. This finding corresponds with the level of media control in which the respondent resides. The government-oriented audience state that the **information available to them is not sufficient**. Rather, they consider the information flow repetitive: they see media 'stealing' news from each other. Contrary to this, a slight majority of the opposition-oriented audience says that the news they need is available to them.

Syrians are however not satisfied with the quality of the news available. Respondents unanimously agree that in the currently available news, **sourcing is their main issue** of concern. Also, an aspect of quality news mentioned by all respondents is the inclusion of diverse vantage points in reporting. All respondents link the quality of information to independence in one way or the other. There are slight differences between audience groups as to how this link is made. The opposition-oriented audience directly associates quality news with characteristics of independent media. These

Nuances in media literacy skills

Despite their media literacy skills, many respondents did exhibit difficulty assessing items produced by outlets they were not yet familiar with. Especially statements about balance, credible sourcing and the political position of the journalist or media organisation were considered complicated.

Another striking finding is the trust the Syrian interviewees put in television sources. They tend to see television as a verification of news they consumed elsewhere. The verification power of television is connected to the fact that it displays video imagery. Also, quite a few respondents referred to television channels in combination with the words "credible", "trust" and "accuracy".

include impartiality, lack of bias and credibility. Government-oriented audience members **prefer to consume information that is well-sourced and "coming from independent media outlets"**.

Syrians are critical – media literate – media consumers

The Syrians included in this research have the habit of investigating news reports by themselves: they do so by comparing information through multiple news sources. This appears to be standard behaviour to 'negotiate truths', but also to verify and access additional details. The main reason behind this habit is their unanimous concern with the trustworthiness of the information they consume. If Syrians are unable to verify information in an item, they also do not share the

9. Syrian-based media, in contrast to pan-Arab or international media

10. In this report, the term media literacy is used to describe critical media behaviour, thus a media literate person is capable of assessing the trustworthiness of information and (media) sources.

news on social media. The audience panel data show that when items are scored low on credibility in sourcing, they generally also scored low in willingness to share the item on social media.

All respondents exhibit a relatively high trust in international news organisations. Some of the media mentioned are the BBC and the Washington Post.

"[I rely more on] international sources because I consider them more credible. I believe they have high standard of what's to be published as good news."

An opposition-oriented respondent

Trust in indigenous⁹ media is much lower. Especially opposition-oriented respondents do not consider indigenous news credible. They access local news mainly for information affecting their safety.

Syrians consider themselves media literate.¹⁰ Respondents are overwhelmingly confident that they can identify the political agendas behind the information they consume. Both the interview and the audience panel results confirm this self-assessment. Government-oriented audience members can be considered more critical and media literate than their opposition-oriented counterparts. Despite their political preference for the government, these respondents exhibited a critical attitude towards pro-government content. This content was rated negatively 47% of the times. Opposition-oriented respondents were much more positive about the content in line with their political preference: they were negative about this content in only 24% of the cases.

Syrians have high expectations of media (professionals)

Syrians from all sides of the political spectrum expect a lot from the media. They also believe that the media can play an important and even crucial role in society. That is, provided that the media operates credibly, reliably and does not take any sides. Government-oriented respondents seem to expect more guidance from media compared to other respondents.

Media should act as a watchdog, play a role in conflict resolution and should offer solutions to common problems. These are the three main roles that respondents would like media to take on. In its watchdog role, media should address corruption and monitor the government. To positively affect the conflict, the interviewees suggest that media increase tolerance, bridge gaps in views and "heal the social rift". This extends to the third role Syrians see for media professionals: to write constructive journalism. For the respondents, this means that media play a part in solving the problems they discuss in their content.

Conclusion

The findings of this study have implications that go beyond the Syrian context. It shows that even people who have never lived in an open media environment have a deep understanding of the value of independent media. They are able to recognise the extent to which media professionals adhere to journalistic standards, such as balance and impartiality. These results imply that independent media have a potential to expand their audiences, even into hard to reach areas or towards hard to reach audience groups.

Syrian independent media should also reach out to the – so far untapped – government-oriented audience. This audience segment is clearly open towards receiving independent news. Syrian media professionals can use the findings of this study to adapt their business strategies. Expanding their audience will require a comprehensive approach directed at engaging with potential audience groups and gaining their trust. It also means a consistent adherence to independent journalism standards.¹¹

The near future in Syria is likely one in which the space for media and freedom of expression is shrinking. Where the Syrian conflict opened the media market towards an expansion of new media organisations, an opposite trend is currently taking place. The Assad government is expected to re-establish strict media control in regained geopolitical areas. Independent media will need to expand their audiences from an exiled position, and into a media-dark area.

With the challenges that independent media are facing, support from independent donors and the development community will remain imperative. Financial resources are needed to ensure that Syrians throughout the country have access to reliable information. Access to expertise about media in exile and outreach to audiences in media-dark areas, are increasingly important to Syrian media. Both donor organisations and (media) development organisations are of vital importance in assisting these media in the years to come.

Syrian audiences have high expectations of the media. They expect them to play a positive role in conflict resolution as well as perform a watchdog role. With the support of the development community, independent media can play this positive role – provided that it adheres to the professional standards and the conditions set by the Syrian audiences.

- Detailed in-depth recommendations for Syrian media professionals to be found in annex 1 of this study.
- Detailed in-depth methodology and technical report for the development community to be found in annex 2 of this study. The content reel factsheets follow the methodology (annex 3).

11. In-depth recommendations for Syrian media professionals in annex 1 of this study.

Colophon

Editors:

Evaline Schot

This study was commissioned by Free Press Unlimited to:

Ipsos (fieldwork with third party subcontractor) and Conflict Management Consulting

The publication was generously supported by Sida.

All rights reserved 2019

Contact:

Evaline Schot

schot@freepressunlimited.org

