BRIDGING THEORY AND PRACTICE

AFTER THE REVOLUTION: LIBYAN AND TUNISIAN MEDIA THROUGH THE PEOPLE'S EYES

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People in Libya wanted a free and open media but felt concerned about its consequences. Credit: BBC Media Action

Executive summary

Much has been written about the media in Libya and Tunisia following the revolutions of 2011, most of it focused on the role of social media, mobile telephony and the internet, as well as on rapidly proliferating private media. There has been little research, however, that looks at the media through the eyes of those who consume it.

This report draws on the work of BBC Media Action in Tunisia and Libya and collates audience research undertaken in 2013 and 2014 exploring people's perceptions of the media during that period. Statistics and analysis given reflect this research. This paper does not attempt a comprehensive analysis of the distinct, fast-changing and complex Libyan and Tunisian political and media landscapes, but is intended to summarise and draw insights from two sets of research which we hope will contribute to a better understanding of how people in these countries view their media.

Drawing comparisons between the views of the respective audiences, the report assesses the performance of the media in Libya and Tunisia from an audience perspective. In Tunisia, the findings are based on a nationally representative quantitative survey and 26 audience focus groups held in urban and rural locations across the country. The Libyan data comprises two nationally representative quantitative surveys and six audience focus groups held in the Libyan cities of Tripoli, Benghazi and Misrata.

While the two states have many differences, and are clearly at differing junctures following their respective revolutions, our research reveals that people in Tunisia and Libya have much in common, levelling similar criticisms at and expressing similar hopes for their media. People in both states share the belief that a credible, accurate and objective media is an important element of their country's future.

Libyans and Tunisians have grown weary of coverage that represents the interests of those who run or fund the channels and consequently place little trust in the media. Perhaps as a result of these limitations, the audiences are savvy and discerning consumers who "shop around" to access information and verify what they find.

People desire the media to do more than highlight problems. They want it to discuss solutions and act as a force for good rather than foster division. The degree to which this is possible varies by state. In Libya, audiences expressed fears that honest debate about many topics would lead to violence and recrimination. These concerns were less acute among audiences in Tunisia, but people felt that the media could do more to debate the issues that matter to them, rather than engage in what they often perceive as mud-slinging.

With an estimated 4.6 million Facebook accounts in Tunisia at the time of the research,[1] social media was an important part of the media environment. Internet penetration in Libya was considerably lower – 22% in comparison with Tunisia's 45%[2] – yet there were a reported 1.9 million Facebook accounts there.[3] This number is growing rapidly. Social media is a key source of up-to-date news and information for many people, helping to counteract the shortcomings of the traditional media. Much focus has been placed on the proliferation of private media and the rising importance of social media since the Arab Spring,[4] nonetheless people remain healthily sceptical. While levels of trust in all forms of media are low, traditional media tends to command more trust than social media.

BBC Media Action research also indicates that, at the time of data collection, the Libyan and Tunisian state broadcasters continued to attract large audiences, acted as important sources of news, and were generally trusted more than private channels.

Our research indicates that watching the evening news bulletin is akin to a national institution in Tunisia. Nearly three-quarters (72%) of people reported watching the news on the state channels. Keeping up-to-date with news and current affairs is important to Libyan audiences: national news was most important to them, and was watched by 48% of the population. Al-Wataniya was the most watched channel.[5]

The nature of Libyans and Tunisians' relationship with their state broadcasters is complex. People noticed improvement in their state broadcasters

and feel a sense of ownership and loyalty to them, as well as feeling frustration with their shortcomings. In both countries, people speak of the state broadcasters' duty to share vital news and views on the issues that matter to them and to offer solutions and hope.

While Libyans and Tunisians' perceptions of their countries' media sectors have much in common, their assessment of the likelihood for violent recrimination against the media differed notably. Libyans believed that this was a very real prospect and alluded to the risks to journalists from the highly unstable political system and from armed groups. Our research indicates that Libyans understood the problems that their journalists and media outlets faced and, therefore, understood that their "ideal" journalism was not always possible.

This leads to an unreconciled tension: while Libyans would like trustworthy and impartial information, they also accept that circumstances may make this impossible. Moreover, it may be safe to assume, from Libyans' comments about both their country's media and the broader political environment, that there are limits to how much the sector can be expected to change (for example, to increase levels of impartial reporting) while serious security threats persist.

Our research indicates that Tunisians attach great importance to the media and its role in political change, particularly as an accountability tool, which led people to have high expectations of their media sector. However, Tunisians' criticisms of the sector indicate that, at the time of the research, the media struggled to meet these

1. Facebook (2014) [Accessed 28 August 2014].

2. Internet Live Stats (2014) [Accessed 28 August 2014].

3. Facebook (2014) [Accessed 28 August 2014]. This figure relates to the number of accounts at the time the research was conducted.

4. Much debate has surrounded the role of social media in the uprisings during the Arab Spring (see *Westminster Papers in Communication and Culture,* 2013). Meanwhile the impact of private broadcasters on the media sector in the Middle East, initially dubbed "the Al Jazeera effect", has been a major source of debate for scholars since the late 1990s, with little attention paid to the role of state broadcasters (see Seib, 2007).

5. At the time of the research, al-Wataniya was clearly known as the state broadcaster. At the time of writing, its status is less clear.

expectations. Nevertheless, people's demand for accurate, transparent and impartial information offers considerable cause for optimism.

Following an introduction to the research questions under investigation, the remainder of this report is divided into four chapters.

- **Chapter 1** looks at the political context that underpins the media in Tunisia and Libya and details developments in the media sector following revolution
- **Chapter 2** is a case study of Libyan audiences' views of the media since the revolution
- **Chapter 3** is a case study of Tunisian audiences' views of the media since the revolution
- **Chapter 4** draws comparisons between the two sets of data, illustrating that Libyan and Tunisian audiences share the same criticisms, suspicions, pessimism and hopes of their media sectors

Research aims, data sources and methodology

This BBC Media Action Bridging Theory and Practice report is based on data drawn from surveys and focus groups conducted in Libya and Tunisia between March 2013 and March 2014. The report takes the form of two separate case studies (Chapters 2 and 3) setting out the findings for each country, followed by a concluding section that draws out comparisons and differences between the two.

Purpose and research questions

Much has been written about the media from a policy standpoint following the Arab Spring. Justifiably, considerable discussion has taken place over the role of the proliferating private media and the breakneck growth in the influence of the internet, and social media in particular. But there has been little research that looks at the subject through the eyes of those who are really at the heart of the matter – citizens.[6]

BBC Media Action has been working with the state broadcaster in Tunisia since 2011 and in Libya since 2012 as part of our capacity-strengthening work supported by the Foreign and Commonwealth Office (FCO). This work has been underpinned by quantitative and qualitative audience research in both countries to inform the development and evaluation of the projects.

Recognising the limited research data available from both countries, this report aims to share the insights emerging from this project data. It compares the views of citizens of the two countries in 2013 and early 2014 towards the media's current role and what people believe that the media should be doing.

While the various data sources that this report draws upon were based on different research questions and objectives, and were not originally designed to be comparable, they have been revisited for this study with the following three research areas in mind:

- How do Tunisian and Libyan audiences consume media, and why?
- What level of trust do audiences in both countries place in the media and information sources available?
- What do audiences believe that the role of the media in their countries should be?

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6. Publicly available studies based on audience research around media in post-revolution Libya and Tunisia include: ASDA'A Burson-Marsteller (2014), Northwestern University in Qatar (2013) and Northwestern University in Qatar (2014). The latter two are nationally representative studies covering Tunisia but not Libya, which focus on audience media consumption and perceptions but do not go into detail about specific broadcasters and sources of information.

Data sources and methodology

The data sources used to inform both case studies were:

Libya

- A national survey of 3,196 Libyans was commissioned by the FCO in March to April 2013[7] with a primary focus on media consumption patterns and audience attitudes towards different media and information sources.
- A second survey of 1,146 Libyans was commissioned by BBC Media Action in August 2013. This survey primarily covered attitudes towards and knowledge of the constitution-building process but also asked a small number of media consumption questions.

For both surveys, data was collected via telephone with randomly selected people from all 22 districts of the country.

- In addition, six focus group discussions were conducted by a research agency on behalf of BBC Media Action during March 2014 in the three main cities in Libya: Tripoli (four groups), Benghazi (one group) and Misrata (one group). Participants were recruited on the basis of sex, age and marital status. Participants were asked a range of questions about important issues in Libya and the media's response to them, as well as questions about public service broadcasting in the country. They were also asked to take part in a card sorting exercise in order to facilitate discussion about the values associated with an ideal broadcaster.[8]

Tunisia

- A nationally representative survey of 1,000 Tunisians[9] was commissioned by BBC Media Action and carried out by a Tunisian agency in June 2013. It was designed to obtain data about media consumption and audience attitudes to information sources and media outlets including the state broadcaster. Interviews were carried out face-to-face at the respondents' homes.
- In addition, 12 audience focus groups on the topic of news coverage in the media and, in particular, television news bulletins were held in urban and rural locations across Tunisia (Tunis, Bir Ali Ben Khalifa, Sidi Bouzid, Kasserine and Beni M'tir). There were six in December 2013 and six in March 2014.
- A further 14 audience focus groups were held across Tunisia (Tunis, Gabes, Kairaouan, Kebili, El Kef, Ksibet El Mediouni, Sfax and Sousse) in March 2014 to review media consumption in Tunisia. Participants were also asked to take part in the card sorting exercise.[10]

Focus group participants represented a mixture of ages and socio-economic classes, and equal numbers of men and women were recruited.

This report's findings are based on data collected through research designed to meet the needs of BBC Media Action projects, and completed before the report was commissioned. The exception is one FCO-commissioned survey in Libya that was made available to BBC Media Action to support our work. Where necessary, we carried out additional analysis of BBC Media Action and FCO data to fit the aims of this report.

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7. Altai Consulting (2013).

8. See Annex 1 for details of the Media should/Media shouldn't exercise.

9. The original sample size planned was 1,000 but after data entry and data cleaning the final total sample size was 999.

10. See Annex 1 for details of the Media should/Media shouldn't exercise.

The limitations of this research should be noted, namely the limited comparability of data sources from each country, as the data was originally collected for separate purposes using different methods. There are gaps in what the data can tell us on certain issues because the research instruments used were designed to answer different research questions in the first instance.

It should also be noted that using telephone surveys, as in the Libyan research, raises difficulties in ensuring a truly representative sample, as there is potential for response bias (meaning that certain types of people may be more likely to partake in a telephone survey).

See Annex 2 for further details around the research methodology, instruments and limitations.

Tunisians are savvy consumers of news, who get information from a range of sources. Credit: Alfredo D'Amato, Panos Pictures

Chapter 1
State, society and media in Tunisia and Libya

Tunisia and Libya are at different junctures following what were very different revolutions in 2011.

Cautious optimism currently prevails in many circles regarding developments in Tunisia. The adoption of a new constitution and the presidential and legislative elections in late 2014 suggest a clear, if contested, path to democratic governance. Tensions, of course, remain over a number of issues, not least the place of religion in Tunisian society. The assassination of two leading leftist opposition politicians in 2013, Chokri Belaid and Mohamed Brahmi, allegedly by Islamist militants, led to a political crisis during which the National Constituent Assembly was suspended for two months.[11]

In many respects, Libya has come to resemble a failed state; it is divided between rival governments and armed factions are competing for control. Extremist groups are gaining ground and most national institutions have collapsed. International efforts are underway to facilitate an end to armed conflict and seek consensus among rival militias. Attention is currently focused on the UN-sponsored talks, which aim to promote reconciliation and the formation of a national unity government.

11. See Human Rights Watch (2014).

Box 1: Parallel fates

Tunisia and Libya share a border as well as thousands of years of history. The territories they encompass have been ruled at times by the same empires and at other times by warring regimes. Libya declared its independence in 1951 after intermittent Italian rule. Tunisia was a French protectorate from the 1880s until achieving independence in 1956.

Following independence, both new states were founded as constitutional monarchies. In Libya, King Idris ruled from 1951 – prior to independence – for 18 years, aided by the vast income generated from oil reserves discovered shortly after his accession. This influx of capital transformed a nation with scarce resources and a weak economy into an expectant one, with its citizens eager to reap the benefits of its new-found wealth. Prior to the rule of Idris modern Libya consisted of three kingdoms: Tripolitania to the west, Cyrenaica to the east and Fezzan to the south. At the time of union, Cyrenaica, with its capital Benghazi, was at least the equal of Tripoli. The concentration of power in Tripoli to the detriment of the east, where most of Libya's oil reserves are found, was a major source of contention, and remains so.

In Tunisia, Mohamed VIII al-Amin was appointed monarch of the newly independent state. But he was soon toppled in a revolution led by Habib Bourguiba, whose autocratic rule lasted 30 years. In this time, Bourguiba's programme of government centred on the development of the economy, the creation of a secular state and the suppression of Islamic fundamentalism. He was succeeded in a bloodless coup by Zine al-Abidine Ben Ali in 1989. Ben Ali followed his predecessor's approach: people were told that the country's development depended on the sacrifice of personal freedoms, including clear limits to personal expression and political opinion.

In Libya, King Idris was ousted in 1969 by a group of young army officers led by 27-year-old Muammar Gaddafi. After seizing power, the young Gaddafi set about spending the state's newfound wealth with the declared hope of creating a "state of the masses". In reality, the only power that mattered centred on Gaddafi himself, with his rule becoming a tightly controlled dictatorship. Opponents of the regime were dealt with severely.

The differences in the circumstances around the falls of Gaddafi and Ben Ali are indicative of the differences between the two states. When the army failed to step in to quash public protest, Ben Ali was swift to flee the country, the first leader to leave power in the Arab Spring. Overthrowing Gaddafi was to prove an altogether different story, as the "Brother Leader" chose to stand and fight. Armed conflict ensued, where the opposition forces – with air support from NATO – prevailed. After months of bitter fighting, Gaddafi was shot dead.

Media pre- and post-revolution

The situation in Tunisia

Unsurprisingly, the media environments of the two countries reflected the regimes that ruled them. In Tunisia, the two state television channels, under the umbrella of Tunisie 7, dominated the broadcast sector. Both followed the government line and coverage was mostly of the daily schedule of the president, his government and their families. The two large private channels, Hannibal and Nessma, also had close links to the Ben Ali clan, although private channels were forbidden from reporting on politics.[12] The Tunisian Internet Agency monitored and restricted online expression.

The only opposition in the media was found in newspapers, but these were closely censored. At one point, all newspapers had to be sent in their entirety for approval before they could be published.[13] In time, this policy was relaxed as it was felt that the newspapers had a clear idea of what was and was not permissible.

Table 1: Libyan and Tunisian media in numbers

	Libya	Tunisia
Population (millions)[14]	6.24	10.94
Television channels (approx.)	20	24
Radio stations (approx.)	200	35
Newspapers (approx.)	200	47
Internet penetration (%)[15]	22	45
Facebook accounts (millions)[16]	1.92	4.6

12. See El-Issawi (2012), p. 4.

13. Ibid., p. 7.

14. CIA (2014).

15. Internet Live Stats (2014) [Accessed 28 August 2014].

16. Facebook (2014) [Accessed 28 August 2014].

17. HAICA is the acronym for Independent High Authority for Audio-visual Communication. It was preceded by INRIC (the National Authority for Reform of Information and Communication), which was dissolved in 2012.

Following Ben Ali's ousting, the state-run press and media were restructured. In addition to state television, now renamed Watania 1 and 2, there are nine radio stations; five are based in Tunis and four are based in regions outside the capital. Significant progress has been made in the regulatory sector, an area of weakness in Arab media sectors because of the history of direct state control. When founded in May 2013, the independent audio-visual regulatory body, the HAICA,[17] became only the second independent regulator in the Arab world. HAICA has been a staunch advocate for media reform since its founding, yet the nine-person body faces considerable challenges in establishing itself as a functioning institution.

Despite this, the use of defamation laws from the Ben Ali era saw judicial authorities continue to prosecute journalists and bloggers. It remains an issue that has not been amended by Tunisia's National Constituent

Assembly. In March 2013, a blogger was charged with criminal defamation for alleging the misuse of public funds by a former foreign minister.[18] Police brutality against journalists has also been cited as on the rise. In Djerba, a journalist was left unable to work for 35 days following an attack by police when trying to cover a protest in July 2014.[19]

Table 2: Press freedom scores for Libya and Tunisia

	Libya		Tunisia	
	2010	2014	2010	2014
World Press Freedom Index[20]	160	137	164	133
Press Freedom Index[21]	192	133	186	112

According to Freedom House's Press Freedom Index, Tunisia and Libya were the countries with the greatest gains in press freedom between 2009 and 2014. The index is judged across a variety of criteria related to the legal, political and economic environments governing each country's media sectors.

Freedom House concludes that Tunisia's media landscape "remains in transition" with positive and negative developments. While people may see the draft of the new constitution and the founding of the HAICA as a victory, the Freedom House Press Freedom Index finds the stepping up of legal cases against journalists to be a cause for concern.[22] The World Press Freedom Index goes further, arguing that: "Three years after Ben Ali's removal, authoritarian methods continue to short-circuit reform attempts and block state media independence."

The situation in Libya

In Libya, the state broadcaster set up by Gaddafi – al-Jamahiriya – became little more than the mouthpiece of the regime. It was run along military command and control lines. "Jamahiriya" was the invented term for Gaddafi's "state of the masses" and illustrates the total cultural control the regime sought over its people. Gaddafi's self-fashioned image as a philosopher meant that the "Brother Leader" subjected Libyans to his lengthy sermons on state television, which sometimes lasted more than four hours without interruption.

Al-Jamahiriya was followed by another state broadcaster called al-Libiya, which was set up by Gaddafi's son Saif al-Islam. Al-Libiya was supposedly to be allowed greater editorial freedom as part of Saif's project of modernisation. But the station soon found the limits of this supposed freedom as Gaddafi forced the station to rebrand and agree to remove anything that could be seen as critical to the regime.[23] Difference and diversity were always ruthlessly suppressed. Perhaps unsurprisingly, Libyan media practitioners were less likely than their Tunisian counterparts to have developed the production, reporting and technical

18. Reporters Without Borders (2014e).

19. Reporters Without Borders (2014b).

20. The higher the number, the lower the level of press freedom; see Reporters without Borders (2014d). (Reporters Without Borders produces the World Press Freedom Index.)

21. Karlekar (2010) and Freedom House (2014a).

22. Freedom House (2014b). (Freedom House produces the Press Freedom Index.)

23. Shamat (2014).

skills that they would need post-revolution. A skills gap therefore exists between the two countries.

During the Libyan revolution, the propaganda battle between the regime and its opponents was fierce. Until this point, media in Libya was restricted to state media, but as the rebel movement gained momentum and the regime's stranglehold was loosened, a raft of private television channels began to spring up. These private channels are often associated with political factions, with the Qatar-supported al-Neba seen as backing the Muslim Brotherhood and al-Aseema seen to be backing a liberal agenda.

The flagship channel of the regime, al-Jamahiriya, was rebranded following the regime's ousting and is now known as al-Wataniya. The other, smaller, state broadcaster, al-Libiya, was renamed al-Rasmiya. State-owned newspapers have similarly been rebranded.

The Libyan media is by no means free. Criticism can lead to violent recrimination. Freedom House reports that the deteriorating security situation "ensnared journalists and other members of the press, who suffered a spate of threats, kidnappings, and attacks" in 2013. Such attacks were primarily perpetrated by non-state actors, and this trend has continued into 2014, with a number of journalists losing their lives.[24] Meanwhile, the use of Gaddafi-era laws to bring defamation charges means that journalists continue to face lengthy prison sentences. One reporter is currently facing up to 15 years in prison for alleging judicial corruption. As a result, Freedom House has now categorised the Libyan media as "Not Free",[25] and the World Press Freedom Index writes that the Libyan "media spring" is "running out of steam".[26]

The media landscape in Libya mirrors the division and factionalism seen in the current conflict, reflecting broadly pro- and anti-Islamist lines. During the intensification of fighting from July 2014 onwards media outlets became a focus for factional violence. Media workers and journalists were threatened, intimidated and kidnapped.[27] Regardless of their editorial stance, many channels and their staff have been the target of opposing fighting groups, with attacks on stations and illegal detention of journalists. Many stations, both TV and radio, have either closed their operations or are broadcasting from abroad. This has brought increased risks for journalists in Libya and created a climate of fear. Many have left the country.[28]

State television has been deeply affected. Libya's al-Wataniya was taken over by pro-Islamist militias in August 2014. The militias wasted little time in exerting pressure to ensure that the station became a mouthpiece for their point of view. A number of staff received death threats. A power struggle ensued over who controlled the channel's satellite feed.

24. Freedom House (2014b).

25. Freedom House (2014c).

26. Reporters Without Borders (2014d).

27. Reporters Without Borders (2014f).

28. Al-Aseema is one such example, with its offices reportedly attacked.

This led to the splitting of the channel in two with rival feeds from Tripoli (pro-Islamist) and Tobruk (pro-Karama, which is broadly anti-Islamist). The other state channel, al-Rasmiya, had been controlled by militias for almost a year and remains in the hands of a pro-Islamist militia; it was also taken off the air by the authorities in Tobruk. It, too, has a rival feed from the east, which is dominated by the House of Representatives.

Watania and al-Wataniya

The state broadcasters in both Tunisia and Libya have the same name (al-Wataniya, meaning "national" in Arabic). To avoid confusion in this report, the Tunisian state broadcaster is referred to as "Watania" and its Libyan counterpart is referred to as "al-Wataniya".

Chapter 2
Libya case study

Overview

Our research in June 2013 and March 2014 found that Libya's media post-revolution reflects the wider circumstances of the state, with audiences frustrated and poorly served. Overall, trust in the media is low. Libyans believe, rightly or wrongly, that all media is dictated by the agendas of its funders. In a time that continues to be politically tumultuous, and with the political space contested by a number of actors, the Libyan public is constantly hungry for news and information but does not often find it. Libyans admit that they do not know which sources they can trust. Trusting none, they turn to all – state, national, international and social media – and search for stories they can verify themselves. Of all of the channels available to the Libyan people, al-Wataniya – the state broadcaster and formerly a strident arm of the Gaddafi state – was more trusted and seen to be less agenda driven.

Box 2: BBC Media Action's work in Libya

BBC Media Action started work in Libya at the end of 2011.

In response to the crisis in Libya, BBC Media Action has established a digital production facility and online news and information service using social media called *El Kul* (For Everyone). Supported by on-the-job training for Libyan trainees in Tunis, *El Kul* provides a neutral platform across a range of topics from news to sport and entertainment, and has a particular focus on programming that supports dialogue and reconciliation. Previously, BBC Media Action worked with Libya's state broadcaster, al-Wataniya, to support the production of current affairs programming through a debate show *Hiwar Mushtarak* (Shared Debates) and a family-orientated magazine show, *Babah Maftouh*

(The Door's Open). BBC Media Action also supports a series of educational short documentaries and discussion shows which seek to build awareness and understanding surrounding the constitution-drafting process that is currently underway in Libya.

Previous projects have seen BBC Media Action work with al-Wataniya and Libya's other state broadcaster, al-Rasmiya, to provide them with the fundamental tools to cover the 2012 elections. Former projects have also included the production of television debate show *Sa'at Hissab* (Accountability Hour), and a series of popular short video public service announcements on issues such as the country's new constitution, disarmament and sexual harassment.

How Libyans consume media

Television is by far the most consumed media and is the most important source of information for Libyans. When asked to specify their main source of information, 74% named national or international television.[29] Only one in a hundred Libyans does not have a satellite TV in their home. This means that just about all Libyans have the choice of a wide range of national and international channels.

Seventy-six per cent of Libyans report that they watch TV every day. Libyan channels are most popular, with around half the Libyan population (49%) reporting that they "only" or "mainly" watch Libyan channels. This is almost twice the number who watch "only" or "mainly" international TV channels.

Of these channels, the main state channel, al-Wataniya, is the most popular channel (see Figure 1). This is the case for all socio-demographic groups. The only exception is in the city of Benghazi, where viewers prefer the local Benghazi station, Libya al-Hurra, the city's first private broadcaster, which was set up during the revolution.

The state broadcaster, al-Wataniya, is also one of the two most relevant television channels to the Libyan people (named by 19% of Libyans).[30] A similar proportion named the liberal-leaning al-Aseema channel, based in Tripoli, as the most relevant channel to them.[31] However, this is relative, as the Libyan audience is poorly catered for: nearly one in five Libyans (18%) reported that they did not find any TV channel relevant to them.[32] This sentiment was also reflected in some focus group discussions in which participants expressed frustration at the general lack of useful and relevant information on television about issues that matter to them.

> "The media do not provide information … there are no investigations … they don't dig for information, they don't look for it."
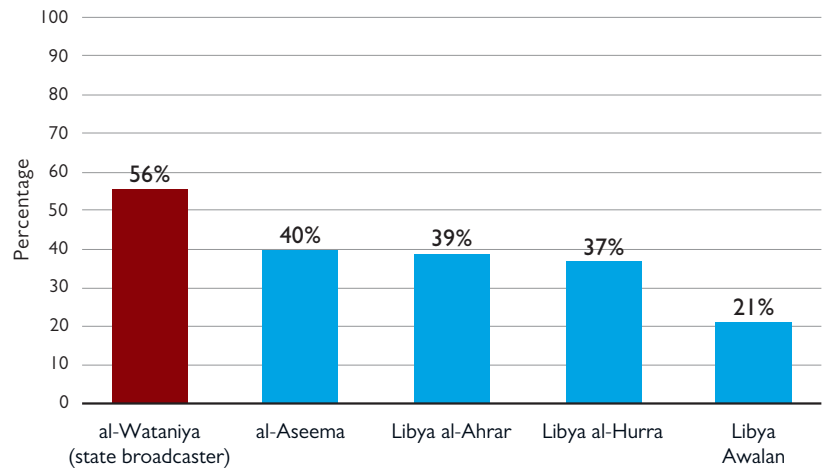> Older man, Tripoli

29. Unless otherwise indicated, the source of quantitative data cited in this case study is the FCO Libya survey, 2013.

30. BBC Media Action Libya survey, 2013.

31. BBC Media Action Libya survey, 2013.

32. BBC Media Action Libya survey, 2013.

Figure 1: Most popular Libyan TV channels*

Bar chart showing percentage of respondents. al-Wataniya (state broadcaster) 56%, al-Aseema 40%, Libya al-Ahrar 39%, Libya al-Hurra 37%, Libya Awalan 21%. Y-axis labeled Percentage (0–100).

Q: Of the Libyan TV channels, which three channels do you watch the most?

Base: People who reported watching Libyan TV channels (2,821). | *The graph shows the total percentage of respondents who mentioned each channel as one of the three they watch the most. | Source: FCO Libya survey, 2013.

Figure 2: Frequency of listening to the radio

Stacked bar chart showing frequency of radio listening by Men, Women, and All Libyans. Categories: Daily, Weekly, Rarely, Never, No access.

Men: Daily 47%, Weekly 10%, Rarely 20%, Never 19%, No access 5%.
Women: Daily 25%, Weekly 14%, Rarely 29%, Never 27%, No access 4%.
All Libyans: Daily 37%, Weekly 12%, Rarely 24%, Never 23%, No access 4%.
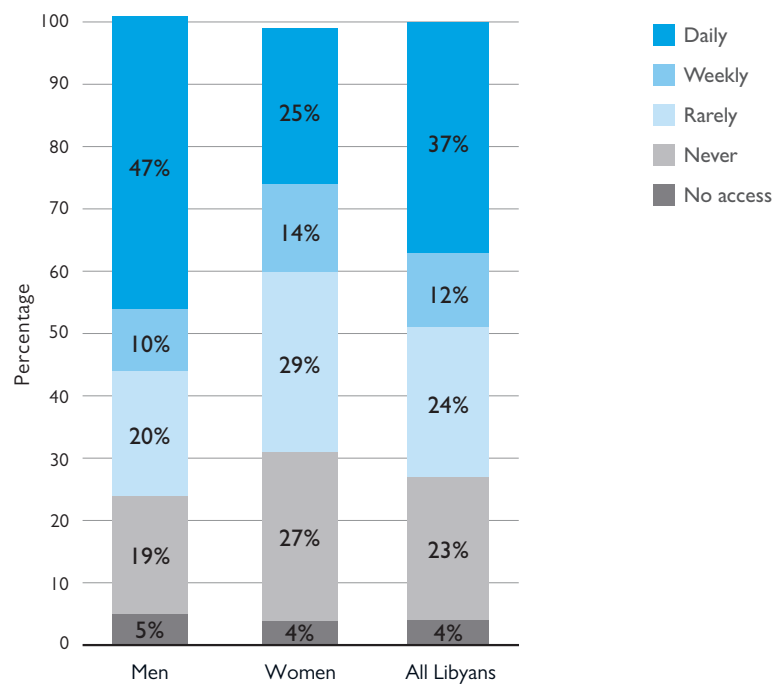
Q: How often do you use radio?

Base: All respondents (3,108). | Source: FCO Libya survey, 2013.

Totals may add up to more or less than 100% because of rounding.

Radio is consumed far less frequently than TV; only 37% of Libyans report that they listen to the radio every day. There is, however, an interesting difference between men and women – almost half (47%) of men listen to the radio daily compared with just a quarter of women. People in Tripoli are also more likely to listen daily than those in other regions. As with TV, the preference is for Libyan radio stations and, again, the state broadcaster hosts the most popular station.

The percentage of Libyans having access to radio at home is much lower than those who have access to TV. Just over half (58%) of Libyans reported having a radio at home, although those from outside the three main cities (Tripoli, Benghazi and Misrata) are less likely to have a radio in their homes.

Focus group participants explained that people often listen to the radio in the car, not just in the home. Listening while driving may also explain why more men than women listen to the radio as in some parts of the country it is not common for women to drive.

Although the quantitative data reveals that women listen to the radio less often, focus group data indicated that, when they do listen, radio may be an important source of information. Older women who participated in a focus group in Tripoli discussed the benefit of radio over other media types:

> "The TV doesn't [cover these important issues] but the radio does, it brings stories and makes visits and interviews … I prefer the radio because I can multitask at home."
> Older woman, Tripoli

Younger women in a separate Tripoli group also said that some radio programmes particularly appealed to them. Focus groups consisting of male participants did not highlight radio as a type of media that they use as a source of information.

Around a third (32%) of Libyans reported using the internet regularly (daily or weekly). However, there are, as might be expected, clear differences between age groups and between regions. Regular use of the internet is highest among Tripolitanians, where nearly half (46%) use the internet daily or weekly. Usage is also higher among younger age groups – 40% of Libyans aged 16–29 use the internet daily or weekly.

Ten per cent of Libyans use international websites as a main source of information. Young women in Tripoli were the only focus group participants who suggested that the internet is a primary source of news and information. They explained that they "get information about these issues from the internet before TV" (Young woman, Tripoli).

Older Tripolitanian women disagreed, saying that they thought that the internet "isn't a source [of information]; it's just for entertainment". The internet was not mentioned by the other groups.

Social media dominates Libyans' time online. The top three sites are Facebook (mentioned by 58% of internet users), YouTube (21%) and Twitter (9%). More than half of Libyans who have access to the internet (58%) have a Facebook account; this means that just over one in four Libyans (26%) have a Facebook account, according to our research. This percentage is higher in the capital where two in three people have a Facebook account, and is the highest figure anywhere in the country. It is, however, worthy of note that this figure is higher than estimates from other sources. The Arab Social Media report, using Facebook analytic data, asserted that Facebook penetration was 13.5% in Libya in March 2013.[33]

Facebook is a significant source of information and news to over half of its Libyan users. Just over half of Libyans who have a Facebook account (52%) report that they spend a lot or quite a lot of their time on Facebook reading Libyan national news. Furthermore, a third (34%) use Facebook a lot or quite a lot to read local news and a quarter (26%) use it to read international news. This quantitative data is supported by the qualitative information shared in the focus group discussions. Most of the groups had at least some participants who used Facebook as a source. As with the internet in general, focus group participants appreciated the instantaneous access Facebook gave them to news and information:

> "Facebook brings you the news while it's still happening …
> that's the best thing."
> Older woman, Tripoli

Although only 7% of Libyans surveyed spontaneously named sources such as friends, family and "the street" as their main source of information, focus group discussions revealed that personal experience and the experiences of family and friends are an important source of information for Libyans. Focus group participants explained:

> "Sometimes we live the news."
> Older woman, Tripoli

> "[We get information] from the people, from the street, you go down to the street and you see reality."
> Young man, Benghazi

33. Dubai School of Government (2013).

Other sources of news and information mentioned by focus group participants included religious figures as well as civil society organisation leaflets and events:

> "We're in a tribal society. The Mufti has an important role, he's respected … He is a kind of media."
> Older women, Tripoli

> "I join all the seminars and debates that I can with dedication and I am sure that any information I hear will be 100% trustworthy."
> Young man, Misrata

Trust and the media

Keeping up-to-date with news and current affairs is important to Libyan audiences, not least because of the constantly changing and volatile political and security situation in the country. Indeed, the most popular genre of programme on the television is the news.

When probed about the type of news they watched, Libyans reveal that national news is most important to them, watched by almost half the population (48%).[34] This, however, is not to the exclusion of international or local news, which is watched by one in three and one in four Libyans, respectively.[35]

Despite the reliance on television as a source of information, Libyans are wary of agendas behind almost all channels and there appears to be very little trust in the credibility of television channels as a result. Libyans we spoke to felt that, rather than representing ordinary people like them, channels tend to represent the interests of those running or funding them instead.

On a day-to-day level, Libyans have a critical view of the capacity of Libyan channels to produce reports that can be trusted. Nearly all focus group participants complained of a broadcast media that they felt was not credible and not trustworthy. The idea that each broadcaster has an agenda which is at odds with truthful reporting was the overwhelming view.

> "Honestly speaking … We don't have a professional media in Libya … not on TV and not the radio … They don't express or reflect truthfully their people … The Libyan media do not serve the people or the country … We don't have clean and non-biased media."
> Older man, Tripoli

34. BBC Media Action Libya survey, 2013.

35. BBC Media Action Libya survey, 2013.

Participants in all the focus groups spoke about the agendas of the media and most explained that the primary agenda was whether a station is "pro-government" or "anti-government".

> "There are some media channels that are pro-government and others that are against the government. There is no one channel that gives a clear picture about the government."
> Young man, Misrata

A channel's source of funding is seen as explicitly linked to the view it would try to propagate. Interestingly, every group said that media should not be funded by the private sector, on the basis that this would impede its objectivity. Similarly, when asked whether a state-funded broadcaster could fulfil the role of the ideal broadcaster that the groups described,[36] most participants said that this would be impossible. Such reservations are not unsurprising in a media sector that has little tradition of independent coverage, and indicates that Libyans will have a hefty degree of scepticism for the foreseeable future.

> "If you want free media the state shouldn't be involved … If the state funds channels or any project, it will certainly lie and make it a promotional tool."
> Older man, Tripoli

The perceived agenda of each channel leads people to question their coverage of events, with focus group participants calling the credibility of the media into question. This lack of credibility is linked explicitly by focus group participants to their lack of trust in the media.

> "In my view all Libyan media is biased … when you sit in front of the TV [you get] depressed. There is no credibility and no transparency around events that happen in Libya."
> Young man, Misrata

> "I don't trust it, there is no credibility."
> Older woman, Tripoli

The perceived distance of the media from the general public is also connected to this, both in terms of the gaps in information relevant to citizens and in terms of the feeling that the voice of the Libyan people is missing from the screens.

> "The only way for media to get some credibility is to go to the streets and listen to the people."
> Young man, Benghazi

36. See Annex 1 for details of the Media should/ Media shouldn't exercise.

In this regard, some see the state of the media as being comparable to what it was under the previous regime, suggesting that, despite the plurality of the media landscape after the revolution, the lack of credibility in the media is very similar to before the revolution. This view was contested in other groups, however. One participant explained that:

> "[There is] no credibility in the media, it is all the same as during the previous regime, nothing new."
> Young man, Benghazi

As a result, Libyans who participated in our focus group discussions expressed confusion about which channel they could trust, often concluding that they could not trust any channel:

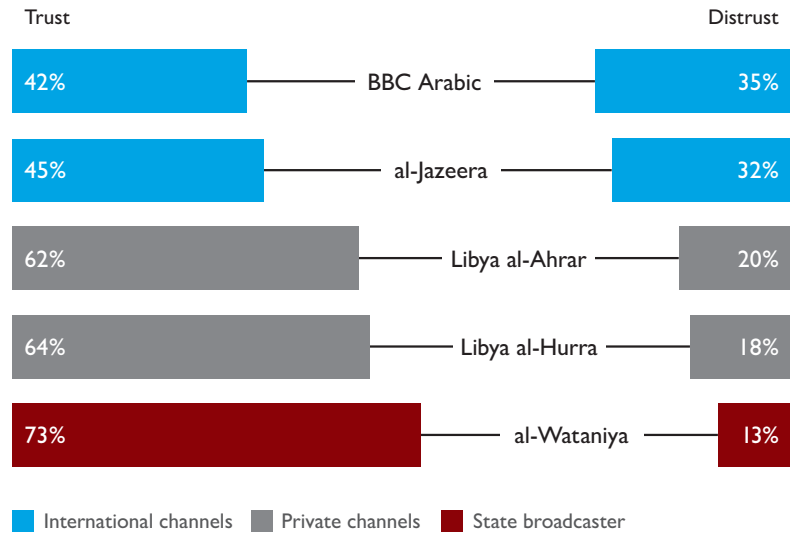> "People don't have trust in any channel."
> Young man, Misrata

When asked directly about levels of trust in certain television channels,[37] international media was least trusted, perhaps because it is perceived as focusing heavily on the problems and challenges following the country's revolution. Around a third of respondents reported some level of distrust in al-Jazeera and BBC Arabic, although this varied to some extent by region. For example, Libyans from Benghazi and Misrata are most likely to trust al-Jazeera, with over half of respondents from these areas (54% and 55%, respectively) reporting some level of trust in the Qatari broadcaster. Meanwhile, those in the south of the country are most likely to distrust al-Jazeera, with 46% of southern Libyan respondents expressing some level of distrust in the channel. Those in the south were also less likely to trust BBC Arabic, with only around a quarter (27%) saying that they trusted the channel compared with 43% in Tripoli and half (49%) of respondents from Benghazi.

Reported levels of trust in the state broadcaster were high compared with other channels. One in three respondents reported strongly trusting al-Wataniya, with a total of 73% having some level of trust in the channel (see Figure 3). Furthermore, compared with private and international broadcasters, the state broadcaster is perceived by relatively few people (6%) as having an agenda. If a serious event took place in Libya, the majority (68%) of Libyans report that the first place they would go to check the accuracy of the information would be Libyan television.

37. The question was asked to all respondents, irrespective of whether or not they were viewers of the channels, therefore the measure is of perception of trustworthiness rather than trust in information that the respondents actually receive.

Figure 3: Levels of trust in television channels*

Trust   Distrust

42%	BBC Arabic	35%
45%	al-Jazeera	32%
62%	Libya al-Ahrar	20%
64%	Libya al-Hurra	18%
73%	al-Wataniya	13%

■ International channels ■ Private channels ■ State broadcaster

Q: How much do you trust these types of media?

Base: Respondents who reported watching television – BBC Arabic (2,750), al-Jazeera (3,028), Libya al-Ahrar (2,969), Libya al-Hurra (2,944), al-Wataniya (2,902). | *All respondents were asked to score each of the channels on a scale. The varied number of responses per channel is likely to be a result of respondents not feeling able to give a score to a channel that they were not familiar with or that they had no particular view. | Source: FCO Libya survey, 2013.

The trust placed in al-Wataniya is relative. When this topic was explored in focus groups, there were mixed views as to the trustworthiness of the state broadcaster. Although participants reported that the state broadcaster had a pro-government agenda – "even the state broadcaster has an agenda" (Older man, Tripoli) – this was seen by some as being less prominent than the agendas of private broadcasters. The state broadcaster is considered by some to be unbiased (Older men, Tripoli) and by some as a credible source of information "it has credibility (but its programmes aren't good)" (Older woman, Tripoli).

Participants in the focus groups gave examples of times when programmes on the state broadcaster were taken off the air because they were critical of the government, and a number of participants shared the opinion that the state broadcaster only supports current ruling officials.

> "People from the [current government] are behind it, they steer it ... if it focuses on the voice of the street they would destroy it ... The state broadcaster is exactly like the channels in the time of the previous regime."
>
> Young man, Benghazi

One of the direct criticisms levelled at the state broadcaster – as with all national broadcasters in Libya – is its slow response to breaking news.

> "[The state broadcaster is] not bad, it might have some credibility, but it is very slow in getting the news out. It covers things you've already got information about."
>
> Young woman, Tripoli

This shows the broadcasters' lack of newsgathering resources. In fact, a number of major stories are broken on social media, where the speed of coverage is an area identified as a particular strength. As a consequence, participants in some of the focus groups explained that broadcast media in Libya could not be relied upon as a primary source because it was too slow. This contrasts with views about news on the internet and social media, which is seen as current and a primary reason for checking these sources.

> "The media is very slow in providing information about those issues. I would get my information from elsewhere, like Facebook. If something happened in town, the TV would only cover it a couple of days after."
>
> Young woman, Tripoli

Libyans appear to believe in the concept of public service broadcasting despite the recognition that the current state broadcaster, al-Wataniya, has a long way to go and that it would not be an easy thing to achieve. When asked whether they thought there should be a national broadcaster in Libya funded by the government, over three-quarters of respondents (78%) said that there should be. It was explicitly suggested by older women who participated in the focus group in Tripoli that a state broadcaster was necessary because it had a greater responsibility to tell the truth and not have an agenda.

> "The state broadcaster channel should stay national and stick to the truth."
>
> Older women, Tripoli

When specifically probed about the extent to which the Libyan state broadcaster currently fits the description of an ideal broadcaster, many highlighted the perception that it is aligned to the current government and that it is not transparent or neutral. Young Libyan men who

participated in the focus group in Misrata questioned whether this could work in the current political situation.

> "The question is will the government allow the channels to say things even against the government? The state … [needs to] ensure that the channel is without an agenda and not biased."
> Young man, Misrata

However, some groups suggested it has the potential to work in this way, as it has some staff who are "very good and professional" (Young man, Misrata). Young men in Misrata also mentioned that the fact that al-Wataniya is close to the government had a positive side in terms of fulfilling its public service role, which is to provide live coverage of sessions of the Libyan General National Congress.

Although international channels are least trusted by Libyans, there is recognition that they provide a useful secondary source of news. Some focus group participants also suggested that the international channels provide information that is more "important" and that "other Arab channels are better than the Libyan ones" in terms of the information that they provide (Young woman, Tripoli).

> "Even during the revolution, you open other Arab channels like al-Jazeera and you see all the news about Libya, the Libyan ones show peace and security."
> Young woman, Tripoli

The internet and social media were important secondary sources for the focus group participants. They explained that they use social media to confirm the accuracy of information they see on TV.

> "If we're watching television sometimes we say 'is that news definitely true?' and we look it up on the internet, or we read it on the net and turn on the TV [to check if it's true]."
> Young woman, Tripoli

This method is not confined to the younger generation – older women in Tripoli also explained: "We have YouTube and Facebook and other things so if we see something on the news we know if it's true." However, participants in this group reported that they do not trust social media as a source on its own: "I trust TV and radio more than [the internet]" (Older woman, Tripoli). This finding is supported by the quantitative data, which found that only 6% of Libyans actively trust the political information they read on Facebook, while 41% distrust it.

As a result of the lack of a completely trusted source, Libyans we spoke to mentioned the need to "shop around" for information, relying on

multiple sources to verify the information they obtain. This includes the ones that they would not trust on their own (notably the internet, and particularly social media) with the "last word" often being given to people they know and trust or their own experiences or perceptions of the situation as it appears in the street.

Many focus group participants expressed a confidence in their ability to "shop around" for information, confirming, rejecting or validating stories from different media sources. As one woman explained "one source is not enough" (Older woman, Tripoli). Many participants explained that they check different news sources to see if a story is the same before they trust it.

> "We have other sources as well and so if the news is not compatible and consistent, then of course we don't trust it."
> Older woman, Tripoli

Governance, accountability and the media

Analysis of the focus group discussions suggests a desire among Libyans for accurate, reliable, investigative reporting in the media, and for media to play a role in holding government to account. Participants expressed their desire "to have in Libya a successful, objective and transparent media" (Young man, Misrata). They also pointed out that media should take advantage of the fact that:

> "The officials, the people in charge, are afraid of things that are covered by the media."
> Young man, Misrata

The group of older women in Tripoli felt that media was improving and holding leaders to account better than in the past.

> "Something good is happening now, they are bringing one person and then another person with the opposite opinion to discuss … now there is a 'right to respond' in the media. So there are some good things."
> Older woman, Tripoli

> "We have all the facts now about the budgets and so on … before, we never used to know how much a barrel of oil costs but now we know everything … the media now reveals everything to do with the government … they've revealed the truth."
> Older woman, Tripoli

No other group said this, however, and overall participants felt that their national broadcasters – state and private – did not have the skills to produce timely, accurate or investigative reports that held leaders to account. A young focus group participant in Tripoli explained that in her opinion the media was "destroyed" and not capable of reporting with quality, citing the example that "people are dying and being kidnapped and [the media] don't report on them."

Such reporting is, of course, easier said than done at present as rival factions compete for control of the Libyan state's governance. In a National Democratic Institute survey in 2013, 37% of Libyan respondents said that they had some level of trust that the media would improve Libya's future, compared with 71% for the military and 67% for the judiciary.[38] This reflects the limitations perceived by Libyans as to what the media can realistically achieve in the context that the country finds itself in.

Some focus group participants suggested that the best way to achieve more objective and trustworthy media in Libya is through media regulation. However, there is not a clear view across the Libyan population as to what media regulation would look like in terms of the relationship between the government and the media sector. When asked what level of control the government should have over media in Libya, around one in three (32%) of respondents said that the government should have "full control", and slightly more – 39% – said the government should have "a little control". One in four (26%) indicated that the media should be "totally free".

Towards a media that plays a positive role in society

Focus group discussions suggested a desire for media to play a positive role in society by, for example, providing equal space for all Libyans, raising citizens' awareness of important issues, focusing on solutions and bringing issues to the attention of officials. They felt, on the whole, that these things were missing from the current media landscape. One person complained that the media avoids talking about solutions when discussing problems while another explained that, in her view, the media takes pleasure in highlighting problems that have not been solved.

> "The media don't contribute to anything, if people call about problems, they just say 'hopefully everything will be fine'."
> Older man, Tripoli

> "They enjoy showing bad things to show the officials that they can't solve the problems."
> Older woman, Tripoli

38. National Democratic Institute (2013), p. 15.

In the context of continuing regional and tribal unrest in the country, Libyan focus group participants unanimously agreed that the media should be a space that embodies equality of views and opportunities. They agreed that the media should not prioritise the views of some people over others or portray the official/ruling parties' opinion first. In addition, they believe that the media should not give more powerful ethnic or religious groups more coverage, produce content that caters to the interest of specialist groups or ignore minority groups.

Yet at the same time, some seemed to find it difficult to reconcile the rights of minorities and those with particular regional identities, long marginalised by the previous regime, with concerns that media should prioritise equality and national unity. Focus groups were asked about the media's role in relation to national and regional identity and participants could not decide whether the media should become involved in such issues or not. Similarly, groups were asked whether particular attention should be given to minority groups and, again, participants' opinions were split.

Most of the focus groups said that the media should be solution-focused and raise questions that are difficult to answer. Only one group discussed that these two aims might be difficult to achieve concurrently. When one participant said "what's the point of asking then?" the others responded "so that the people would look for the solution" (Older women, Tripoli).

Truth vs positivity: two tensions emerge

Two particular tensions emerge for Libyan audiences between, on the one hand, the desire for credible, objective coverage and, on the other, the desire for media to play a positive, non-divisive role.

1. People understand that the media face serious challenges
Libyans want their media to be accurate and objective. However, it is clear that people realise that journalists and their media outlets face considerable pressures and physical danger should they adhere to these standards. This suggests that people recognise that the ideal media that they envision may not be a realistic proposition at this stage.

The safety of journalists was discussed in four of the six focus groups. Participants expressed their concerns that a constant threat to journalists left them unable to provide the trustworthy reporting desired by the audience.

> "If you speak with impartiality someone will stop your programme … or the person [journalist] who tries to be truthful and honest will be threatened, or they would threaten his family … If there was a new channel [that was credible and truthful] then they would blow it up or threaten them."
>
> Young woman, Tripoli

A similar example was provided by a young man in Benghazi:
"If a presenter shows reality … you will find him dead … there isn't freedom of speech … if you say a word of truth, you are killed." When asked to consider which current channels in Libya are most similar to the ideal broadcaster, the majority of the participants said that there is no channel like this, explaining that:

> "If there was a channel like this they would bomb it, they would kill them."
>
> Young man, Benghazi

2. People fear the impact of covering certain topics

The second tension is the conflict between the desire for honest and truthful coverage and the fear of the negative effects that covering particular topics may have on the country. Libyans are wary of the consequences of covering certain topics. Participants in all focus groups warned that reporting that is too truthful about particularly divisive topics can cause conflict and encourage divisions and hatred among people. Groups were asked whether media should be truthful, even if this might upset some people, and whether media should give both sides of the story, even if this might cause conflict. Participants were divided about this with some saying "in Islam you're not supposed to raise conflict" (Older man, Tripoli) and others saying that media should "bypass these issues and disregard them" (Older woman, Tripoli).

> "I want to give a message to all Libyan TV channels … you need to be very careful of every word you say because sometimes one piece of information you say causes division and war."
>
> Young man, Misrata

One of the national surveys asked whether there are any topics that respondents thought should not be allowed to be discussed by the media in Libya. Those who agreed that there were things that should not be discussed identified subjects such as security and internal issues, topics that cause division and conflict, and matters related to the ousted president, Gaddafi. Such issues were, however, also among those judged to be of the most importance to Libyans when questioned (security was mentioned as the most important national issue by 54% of respondents, and the prevalence of weapons in the country was the second most important concern, mentioned by 14%).[39] Participants in the focus group

discussions suggested that the political situation in Libya is still too fragile for controversial issues to be discussed openly.

> "There is still too much hatred and too much blood and racism to start with these issues; if they start talking about these and the compensation maybe things will even get worse."
> Young woman, Tripoli

Participants also spoke of the media inciting hatred and exaggerating conflict when they felt that its role ought to have been to "calm the situation down and report on issues with a realistic view" (Young woman, Tripoli). Some groups suggested that the media is playing an overtly contradictory role, which "speaks about reconciliation and then incites more violence" (Older woman, Tripoli). Participants argued that violent scenes and controversial topics should not be shown, but at the same time they expressed a desire for more information about the reasons for political instability or lack of security.

In addition, some participants also expressed concerns about the media portraying Libya too negatively when covering the country's contentious politics. In their opinion, the media should "show the positive outcomes of the … revolution" (Young man, Misrata).

Chapter 3
Tunisia case study

Overview

Nearly four years on from the revolution in Tunisia, our research in June 2013 and March 2014 found that the media is seen to have taken strides, albeit not enough for a media-literate and politically savvy audience. People appear to be resigned to being able to trust the media only to a limited extent. Tunisians consume a broad range of media, especially the national news aired by the state broadcaster, yet they place more trust in what they hear from family and friends. Tunisians shop around in order to piece together stories, with many relying on the internet as it is, in some ways, seen as a similar medium to the family and friends they speak to face-to-face.

Yet despite this, Tunisians seem unwilling to give up on the state broadcaster and, in fact, hold a sense of loyalty towards it. It is part of the family, although perhaps not the most popular member, and its audience tunes in regularly.

Box 3: BBC Media Action's work in Tunisia

BBC Media Action has been operating in Tunisia since 2011. Current work seeks to develop the public service broadcasting capacity of Watania, the state broadcaster, to report the news and engage audiences through interactive platforms and social media, so that the broadcaster is better able to serve the public needs of its audiences.

Over the past three years, BBC Media Action has worked extensively with Watania, delivering practical support and training to raise the capacity of staff at all levels. This has included management and human resources issues, as well as core editorial and technical production skills. Previous productions supported by BBC Media Action include debate and current affairs programmes, covering issues that matter to Tunisians.

BBC Media Action has also given technical advice to the audio-visual regulation sector, most recently to the HAICA regulatory body, but also to its predecessor, INRIC, to support a more effective and enabling audio-visual regulatory environment for public service broadcasting.

(INRIC is the acronym for the National Authority for Reform of Information and Communication, which was dissolved in 2012. A new regulatory body, called the Independent High Authority for Audio-visual Communication and known as the HAICA, was formed in 2013.)

How Tunisians consume media

The most important information source is the television, and watching TV news is something of a national institution. However, the internet, and social media in particular, is increasingly influential for audiences, who can often access a wider range of materials faster online. Friends and family are also highly significant sources of information for Tunisians, and are seen as the most trustworthy sources of information on political issues and current affairs. Television is the next most trusted source.

Television is the most consumed media and the main source of information. Almost all Tunisians (99%) have at least one television and satellite device in their homes, and 88% report watching television "at least once a day". The television is by far the most relied upon source for information on politics and current affairs, cited as a top source by 83% of Tunisians.

Tunisia's post-revolution media has brought both new openness and new challenges. Credit: BBC Media Action

The favourite TV channel is Ettounsiya (The Tunisian), a private Tunisian station which broadcasts a range of programming, including current affairs and entertainment programmes but not regular news bulletins. It is the home of Tunisia's most popular television programme, the social talk show *Endi Ma Nqoulek* (I Have Something to Tell You).

The state broadcaster is still watched by a great majority: 91% of all Tunisians have watched one of its channels within the past week. But there is one broadcast, in particular, that dominates the Tunisian airwaves, and that is the evening news bulletin on Watania, which is akin to a national institution.

Seventy-six per cent of the state broadcaster's audiences (72% of Tunisians) watch the news on the state channels. Focus group discussions suggest that the state channels are seen as more "family friendly" than some of the newer, more popular channels, and that "the whole family gets together and watches" them (Woman, Kasserine). Most Tunisians in focus group discussions explained that they watch television news frequently, and particularly the 8 o'clock news on the state broadcaster.

> "It depends on the context. If I am here with my friends I watch everything but when I come back to Beja I just watch [the state broadcaster's channels] with the family and I even take off the cable channels."
> Focus group participant, Tunis

> "Yes, the news is the only thing watched by everybody … You can watch it in the café."
> Focus group participant, Tunis

> "If I don't watch the news, I feel like I'm missing something. It doesn't seem right."
> Man, Tunis

Those with more of an interest in regional news may be more likely to tune into the news bulletin on the second channel that covers more regional news ("I always wait for Watania 2's news, because they talk about regions," says a woman from Kasserine), but either way watching the news on state channels is described as "part of our culture" (Man, Kasserine).

Access to radio is relatively high in Tunisia, though less prevalent than television access, with 77% of households owning at least one radio. Over half (56%) of radio listeners say that they listen at least once a day, and a total of 84% of radio listeners tune in at least once a week.

However, only around a third (34%) of Tunisians consider the radio their main source of information. Only one focus group – women in Kasserine, a rural location in the west of the country – cited radio as their main source of information. Yet, importantly, regional radio stations are seen as a better source of information for local news than television, which is viewed by those outside the capital as having a focus on the major cities.

> "We here in Kasserine listen to the radio a lot. The Kasserine station. We didn't have a station before … Then they started a radio station. They're from here, and they tell you what's really going on."
> Woman, Kasserine

Almost a third (30%) of Tunisians used the internet "today or yesterday", with a total of 42% reporting having used it within the last 12 months. Most of these (60%) access the internet at least once a day. The majority (80%) of internet users access social media sites. Here, Facebook is dominant, with 81% of social media users accessing it at least once a day. This is equal to one in three (27%) of the total Tunisian population. In March 2013, the Arab Social Media Report put the penetration rate of Facebook at 34%, the fifth largest of any Arab state.[40] Twitter is much less popular among Tunisians, with 10% of social media users accessing this microblogging site daily.

Over half (53%) of Tunisian users of social media use it to receive news and other important information and opinions. Younger Tunisians, men and those in urban environments are most likely to use social media as a source of information.

One of the main attributes of social media is its speed. Those who cited social media as a source of information said that they learned about many events on social media long before they reached their television screens.

> "For example, that last time something happened, early in January, you didn't hear anything in the news until later, but the pages had information. So Facebook is faster."
> Man, Kasserine

With social media not being subject to one evening time slot, people can access information immediately at any time instead of having to wait for the next news bulletin. But, interestingly, many respondents to our focus group intimated that social media provides more detailed coverage and more information than television ("On TV they give you general idea but on Facebook you find it in detail," says a focus group participant in Tunis), and often covers topics and events that do not appear on TV. Participants also pointed out that Facebook is not subject to censorship and so there is more freedom.

40. Dubai School of Government (2013).

> "Do you think that something small that happens in Kasserine is going to be breaking news on national television? I don't think so. Facebook has the information."
>
> Man, Kasserine

> "You find the whole information without deleting anything like on TV."
>
> Focus group participant, Tunis

The second most popular source of information on political issues and current affairs is friends (mentioned by 50% of Tunisians), followed by family (43%). Men rely on friends for information more than women (54% of men and 46% of women say that they get information from their friends). Meanwhile, women rely more on their families for information than men do (almost half – 49% – of women get information from their families compared with 38% of men).

Focus group discussions emphasised the importance of friends, family and other people as sources of information. Participants gave examples of hearing news when they are out in cafes, metros, taxis, mosques, at the beauty salon or the public baths and from colleagues at work and neighbours. One participant summarised it by saying, "In Tunisia, we're still relying on rumours, things from the street" (Man, Kasserine).

> "We are, praise God, one family. All ten million. News goes out and everybody hears about it. It's like it always has been. I've heard information so many times."
>
> Man, Kasserine

Trust and the media

No source of media is widely trusted in Tunisia; all TV channels are seen as having political agendas, and this is closely connected with perceptions of funding. Audiences associate sources of funding with a given channel's political orientation and this affects the extent to which the channel can play a role in holding leaders and other powerful figures to account.

Although the media is seen to have improved in some ways since the revolution, Tunisians remain sceptical about the overall trustworthiness of the information they get through the media. Some of the groups identified the lack of a credible media as one of the major issues affecting the country at the moment.

> "There is no credible means of media … because they don't give you the correct thing. They have different opinions so you cannot decide [what to believe] unless you experience it yourself."
>
> Focus group participant, Tunis

Other focus group participants suggested that the media has improved compared with the period before the revolution in terms of reporting truthfully, though the limitations of this were summed up by one participant in Tunis:

> "I see that the media is playing a certain role because after the revolution everything has changed and they started to talk about everything even if they don't know their limits or the studio was oriented [towards one point of view] a little bit. Still it is better and they are talking about different things which they didn't dare talk about before, like terrorism."
>
> Focus group participant, Tunis

Tunisians trust friends, family and fellow citizens more than the media as a source of information. Although a significant majority of Tunisians rely on television more than any other information source for their news, it is not the most trusted source. Instead, the most highly trusted information source for Tunisians is friends and family (trusted by 77% of the population) rather than any form of mass media (see Figure 4).
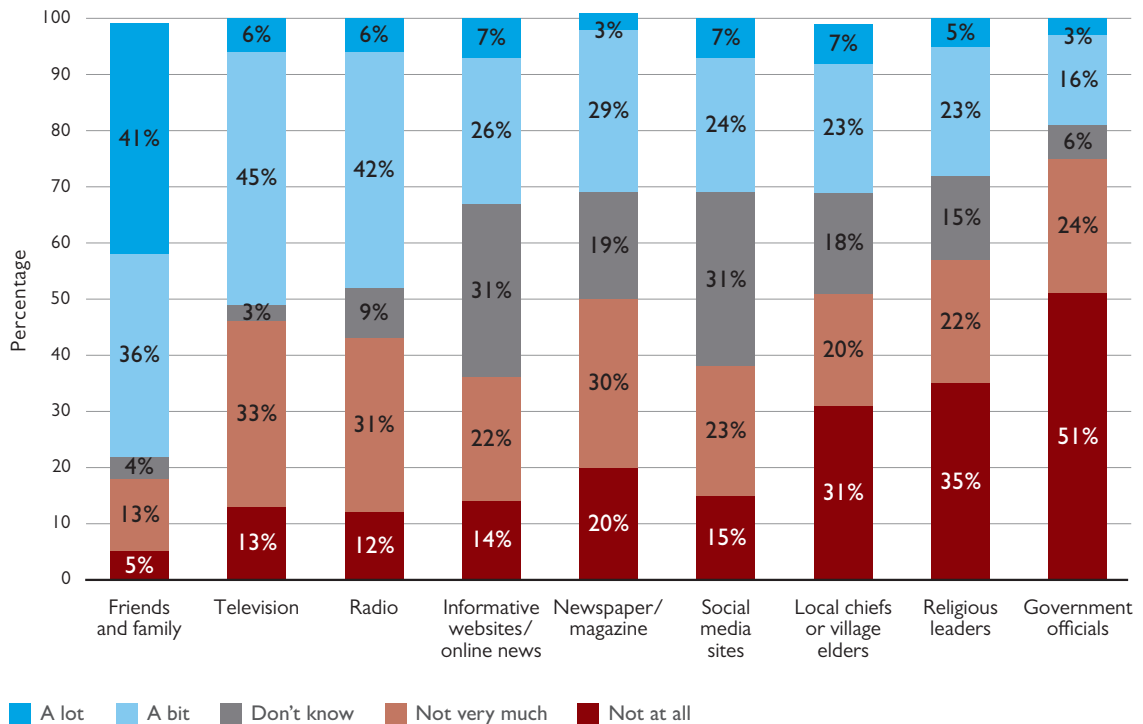
The tendency to trust information heard on the streets or from fellow citizens is reflected also in the focus group discussions around social media; the discussions showed a relatively high level of trust in online sources including social media, with some classing Facebook as the most trusted source. The fact that "citizens are doing it" (Man, Tunis) gives it credibility: "They're from people who are living where things are happening. They tell you the truth" (Man, Kasserine).

The elements of video and pictures from eyewitnesses add to the sense of credibility and make it more believable than other sources including television in some people's eyes. Most of the groups who expressed trust in social media also acknowledged some limitations of sites such as Facebook in providing accurate information all the time. They recognised that Facebook pages may have agendas, and that information read online could be misleading or untrue sometimes. However, some groups suggested that it is possible to know when this is the case and they also pointed out that it depends on the individual page, as some are known to be credible whereas others follow clear agendas.

> "You can know whether the video is real or not … From peoples' comments … [and] you can stop the video [and] go back to check, which is not the case for TV."
>
> Focus group participant, Tunis

Figure 4: Levels of trust in information sources

Legend: A lot | A bit | Don't know | Not very much | Not at all

Source	A lot	A bit	Don't know	Not very much	Not at all
Friends and family	41%	36%	4%	13%	5%
Television	6%	45%	3%	33%	13%
Radio	6%	42%	9%	31%	12%
Informative websites/ online news	7%	26%	31%	22%	14%
Newspaper/ magazine	3%	29%	19%	30%	20%
Social media sites	7%	24%	31%	23%	15%
Local chiefs or village elders	7%	23%	18%	20%	31%
Religious leaders	5%	23%	15%	22%	35%
Government officials	3%	16%	6%	24%	51%

Q: How much do you trust these sources for information on political issues and current affairs?

Base: Respondents who reported getting information on these issues (996). | Source: BBC Media Action Tunisia survey, 2013. | Totals may add up to more or less than 100% because of rounding.

Only 51% of Tunisians have trust in television as a source of information on political issues and current affairs, and out of that group only 6% trust it "a lot". Discussion groups expressed a general feeling that TV never shows the full picture and often lacks important information and details. However, when people compare television with other forms of media, some see it as the most trustworthy.

> "TV can add or cut out things. It won't show everything."
> Focus group participant, Tunis

> "I have the most trust in television, more than anything else. Because there's oversight, and everyone follows it. Everyone watches television, and it's the light of the country."
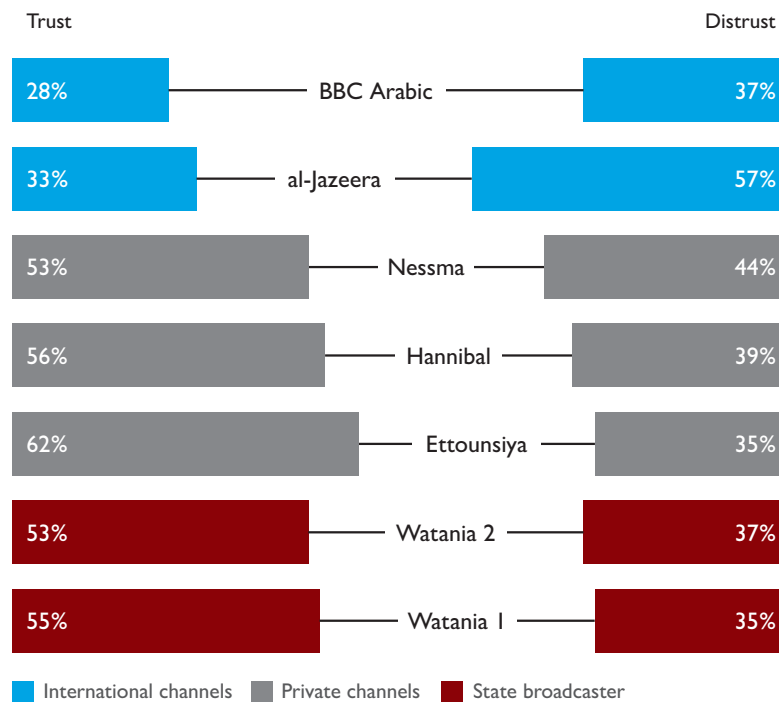> Man, Tunis

Television channels are, on the whole, all seen as having an agenda or political affiliation. One participant summed up this view, saying, "on TV we were under the pressure of Ben Ali [and] now we are under the pressure of the political parties" (Participant, Tunis). This detracts from their credibility as an information source according to focus group participants; indeed there is no one, particular channel trusted by a large

majority of Tunisians (see Figure 5). Knowing that each channel has an agenda makes people doubt all of the information broadcast, "even the way they are introducing true information" (Man, Bir Ali Ben Khalifa).

For Tunisians, neutrality is a pre-requisite to trust: channels in which people expressed lower levels of distrust in the national survey,[41] including France 24 and the BBC, were the ones described as more neutral by focus group participants.[42] Meanwhile, when focus group participants were asked about two particular channels they expressed an overall lack of trust in them as a result of the channels' perceived agendas and their consequent lack of neutrality. The least-trusted channel according to both the national survey and focus group discussions is al-Jazeera, as it is perceived as having a Qatari agenda and 32% of Tunisians surveyed said that they did not trust the channel at all.

> "[If] al-Jazeera talks about Nahdha [an Islamic political party in Tunisia], al-Jazeera will make them sound like champions and lions."
> Woman, Kasserine

Figure 5: Levels of trust in television channels*

Trust		Distrust
28%	BBC Arabic	37%
33%	al-Jazeera	57%
53%	Nessma	44%
56%	Hannibal	39%
62%	Ettounsiya	35%
53%	Watania 2	37%
55%	Watania 1	35%

■ International channels   ■ Private channels   ■ State broadcaster

Q: How much do you trust the following channels for information on issues that matter to you?

Base: Respondents who reported watching television (993). | *All respondents were asked to score each of the channels on a scale. The varied number of responses per channel is likely to be a result of respondents not feeling able to give a score to a channel that they were not familiar with or that they had no particular view on. | Source: BBC Media Action Tunisia survey, 2013.

41. The question was asked of respondents irrespective of whether or not they were viewers of the channels; therefore the measure is of perception of trustworthiness rather than trust in information that the respondents actually receive.

42. Lower levels of distrust do not necessarily equate to higher levels of trust. In the case of some channels, a significant minority of respondents answered "don't know" or "not familiar with the source" when asked about levels of trust in particular channels, meaning that while the proportion of respondents who expressed distrust in these channels is relatively low, so too is the proportion who expressed trust in them. In general, a higher proportion of respondents answered that they did not know or were not familiar with the source when they were referring to the international channels.

Tunisians' loyalty to the state broadcaster, Watania, does not prevent them from questioning its credibility. Only around half (56%) of Tunisians surveyed said that they had some level of trust in the state broadcaster's main channel. The state broadcaster is generally seen as following the government line, with many focus group participants calling their neutrality and trustworthiness into question. Some participants felt that Watania had improved since the revolution, but the general view is that the extent of change is limited.

> "Right now, Watania has changed and wants to reconcile with the people."
> Man, Beni M'tir

> "Watania after the revolution improved but after the election it started to work with the government."
> Woman, Sidi Bouzid

> "You don't feel that they are free to say anything they like."
> Woman, Bir Ali Ben Khalifa

However, there is a general feeling that the state broadcaster is still the most reliable channel for relevant news, and focus group participants tend to show a certain amount of loyalty towards the channel. This may be, in part, because of the sentiment that the state broadcaster's news is part of Tunisia's "culture" and the fact that it covers local and national issues that matter to Tunisians:

> "We've got used to the fact that when we hear news on the state broadcaster, we know there's a 95% chance that it is true. We now don't want to listen to any other news."
> Focus group participant, Tunis

> "It is more credible when I watch a Tunisian channel talk about something happening in Tunisia."
> Man, Sidi Bouzid

Owing to Tunisians' wariness of the media and its perceived agenda, there is seen to be a need to use multiple sources in order to verify information. Friends, family and the internet are particularly important here. This reflects the fact that Tunisian audiences are highly media literate and compare multiple sources to get to the truth. In part because of their cynicism and lack of trust in mass media, Tunisians tend to rely on multiple sources of information to make sure that they get the full picture and a true representation of events happening in their country. Some focus group participants said they watch the news on several different channels and compare the coverage.

> "I personally watch Hannibal and Nessma and National, since they're not at the same time, so I can figure out what's true, and which is the most accurate."
> Man, Beni M'tir

Some use the internet to cross-check what they see on the television news, with one group in Tunis saying that although they do not personally access the internet, they get their children to check the internet for this information on their behalf.

Others use their own judgement or information sources outside the media, such as friends or family, to discern the truth of particular pieces of news. Some said they also rely on their own experiences and observation to verify whether things they hear in the media are true.

> "I have to use my intelligence; I can't watch television passively. I watch, and say 'This person is telling me the news, and will try to get me to focus on a certain thing.'"
> Focus group participant, Tunis

> "If I see news in the newspaper, I call my friends in Tunis [to check]."
> Man, Kasserine

> "Corruption is something that we are living every day and you asked about the reference – it is from the streets and from real life."
> Focus group participant, Tunis

People are also keen to be able to access information and breaking news as quickly as possible, so media consumption patterns vary depending on the time of day and place where people find themselves. "[I get news from] whatever is available at the time. If I'm working, I'll try to find out about it on Facebook. If I have time at night, I'll wait and see what the television news has to say about it" (Woman, Kasserine). The instant aspect of the internet appeals to people for this reason, with groups pointing out that "If something happens at 2:00 in the morning, for example, the radio isn't working then" (Woman, Kasserine) and "The television news is only on at eight at night" (Focus group participant, Tunis).

Media as an accountability mechanism

While Tunisians agree that media has an important role to play in holding leaders to account, the issue of bias and agenda-led coverage is seen as holding Tunisian TV channels back from fulfilling this role. Over half of Tunisians agree that media is playing an important role in holding leaders to account (see Figure 6). Fifty-five per cent of Tunisians agree or strongly agree that traditional media (TV, radio, newspapers, etc.) is playing

an important role in holding leaders to account, ranking alongside the judicial system (54%) and more highly than any of the other institutions about which respondents were asked. New media (including social media) is not far behind, and 51% of Tunisians agreed that it is playing this role. One focus group participant pointed out the importance of media playing this role, "because if everybody speaks there will be pressure on the officials" (Focus group participant, Tunis).

Figure 6: Role of institutions in holding leaders to account

Agree Disagree Don't know
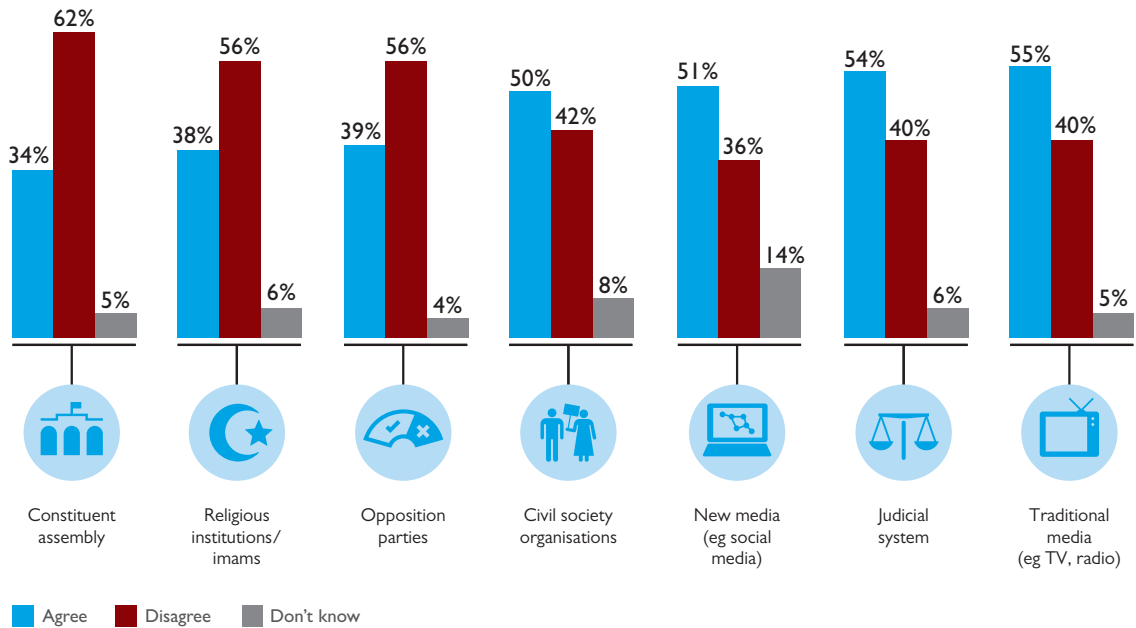
Q: Do you agree or disagree that the following are playing an important role in holding leaders to account in Tunisia?

Base: All respondents (999). | Source: BBC Media Action Tunisia survey, 2013. | Totals may add up to more or less than 100% because of rounding.

As a result of its perceived pliant attitude towards the government, Watania is not seen as bold enough in its questioning of officials. Almost half of Tunisians (42%) believe that state television "ignores cases where the information provided by the government is untrue or insufficient and ignores wrongdoing or failures of government officials". Around a third (36%) agree or strongly agree that the state broadcaster "pushes government officials to provide information about their decisions and actions", and only 27% see it as "holding government officials to account".

There is a belief among the audience that Watania is poor at following up on its questions to government officials, and is too easily brushed aside by them. Forty-five per cent of survey respondents agreed that "[the state

broadcaster] is very close to the government", and that, therefore, the channel shows reluctance when pushing for answers from government officials and leaders. While some pointed out that it is "stronger after the revolution of 14 January" (Man, Sidi Bouzid), it is still described as "weak" (Man, Kasserine) and "afraid" (Man, Beni M'tir) when interviewing officials: "if they bring on someone powerful, they're cowards" (Focus group participant, Tunis). This explains why focus group participants believe that the state broadcaster is under government pressure and follows the government's agenda.

Other channels are seen as similarly limited in the extent to which they hold leaders and officials to account. Like the state broadcaster, their agendas and political leanings are seen as holding them back from really performing this role properly. Another participant suggested that motives other than ensuring accountability drive channels to give government officials a hard time.

> "Unfortunately, the strength of questioning that you're talking about is a question of neutrality. For Nessma, they won't treat a terrorist and someone else the same."
> Focus group participant, Tunis

> "When they invite officials, they just make fun of him for nothing. Is this what you call boldness?"
> Man, Sidi Bouzid

International channels are seen as better at playing this role. Journalists and news anchors on channels such as BBC, France 24 and al-Jazeera are seen as having the confidence and ability necessary to push for answers. However, al-Jazeera in particular is seen as being selective in whom it chooses to hold to account, in line with the channel's perceived agenda.

> "The anchor has freedom to ask questions and do what he wants. He's not afraid that afterwards someone's going to ask him, 'Why did you do that?' As for al-Jazeera, you can see that the anchors already have questions ready and have done their homework."
> Man, Tunis

Many participants pointed out that at present the description of the ideal broadcaster is a "wish" in Tunisia and is currently "impossible" (Focus group participant, Tunis). Asked which broadcaster is currently most like this, many groups cited the national favourite, Ettounsiya. Only participants in El Kef suggested that the state broadcaster is currently "a bit" like this. However, a number of other groups explicitly said that it was not.

Towards a more positive media

News is important to Tunisians, but people have become bored with hearing politicians engage in personal attacks on each other rather than discussing the issues at hand. Instead, they are interested in things that address their social and economic realities and get under the surface of the issues; it is therefore not surprising that the nation's favourite TV programmes are social shows.

Most Tunisians (74%) say they are interested in news about politics and current affairs. In focus groups, participants expressed a preference for hearing news that related to their everyday life and the realities of the situation in Tunisia: "the thing you care most about is the news about the place where you're living" (Man, Tunis). These are particularly things related to social and economic issues affecting Tunisia currently (for example, security and rising prices).

There were different views as to whether or not national politics is of interest as a topic of news. It was acknowledged that political developments are important to follow, but some participants find it stressful and "pointless" (Focus group participant, Tunis), saying that they hear "the same stuff every day" (Woman, Beni M'tir). They prefer to follow social issues and the problems of everyday life rather than politics. Groups in the western region of Kasserine said that news related to their region, which they felt tended to be marginalised by the media, was the most important to them.

Audiences expressed a clear desire for media to be useful for society and help provide solutions to Tunisia's problems, rather than simply highlighting them. It should be a positive force, rather than a negative one. Interestingly, when respondents to the national survey were asked why they chose a particular programme as their favourite, the most common answer was that it was "useful to society".

Focus group participants did not necessarily have a clear vision of what this might look like, but they identified a number of themes. Prominent among them was the desire for the media to provide a platform for national dialogue: "when people from different regions talk they can gather more information and correct things and help to find solutions," said a participant from Sousse. Another common thread is the importance of ordinary people having a voice through the media – "They can listen to us and the situation changes," says a woman from Ksibet El Mediouni – rather than simply political leaders. There was also a sense that the media was not making the most of its function as a communication tool to "pass information [about problems that need to be solved] to the government" (Man, Gabes) and to raise awareness about issues among the general public.

"If they work on [raising awareness] then it will be very easy to find the solution"
Focus group participant, Tunis

This current of positivity does raise some tensions between, on the one hand, a desire for truthful reporting and, on the other, concerns about the unfavourable impact that negative coverage could have on society.

"Like the period of deaths in Chaambi … the media contributed in making the economic situation of the country worse so the number of tourists decreased."
Man, Gabes

There is also some disagreement over the level of freedom the media should have. Many participants were concerned that increased levels of freedom in the media had led to moral and ethical codes being broken, with "limits and red lines" being crossed (Man, Kairaouan) by the media addressing inappropriate topics and social taboos. Some pointed out that media organisations are "still in a transitional stage and don't know their limits … because we have our ethics and traditions so we need to be careful about that" (Focus group participant, Sousse). The overriding feeling is that some journalists and broadcasters are taking their new-found freedom a step too far and that "they misunderstand freedom" (Man, Gabes).

There was some debate in focus groups around the concept of honest reporting, with a lack of consensus on whether or not the media should "be truthful only if it won't upset anyone" or whether it should "cover all topics and stories, even if they might give a negative message or example". A common argument was that "it is not the right time" (Focus group participant, Tunis) for this type of media, while other participants replied that doing this is "very important" (Focus group participant, Tunis).

Chapter 4
Conclusions and implications

Comparative analysis of findings from the two countries

Much of the optimism that surrounded the beginning of the Arab Spring in Tunisia had faded by the time of our research in 2013 and 2014. Replacing the old regimes with more democratic governments has been a difficult process. This is also true for the media – Libyans and Tunisians have seen a number of changes, but feel that many more are needed. People are often frustrated with the sector's lack of progress.

Libya's contested and, at times, chaotic political scene is reflected in its media, which represents a range of political and vested interests, sparking narrative and counter narrative. Ultimately, it has left people frustrated that they cannot access the information that they need.

In Tunisia, the media is seen to have made progress, albeit not enough for a media-literate and knowledgeable audience that places great importance on its role in political change, particularly as an accountability tool. Nonetheless, Tunisians' demand for accurate, transparent and impartial information outlined in this report can be seen as a considerable cause for optimism, and a necessary pre-requisite to meaningful change. A comparative analysis of the audience research reveals a number of findings.

Figure 7: Media consumption in Libya and Tunisia

Libya	Tunisia
Television	
• 99% of Libyans have a satellite television in their homes	• 99% of Tunisians have at least one television and satellite device in their homes
• 76% of Libyans report that they watch TV every day	• 88% of Tunisians report watching television "at least once a day"
• Libyan channels are most popular, particularly the state broadcaster al-Wataniya	• Tunisian private channel Ettounsiya, which focuses on social and entertainment programming, is the most popular
• 74% of Libyans cite television as their main source of information	• 83% of Tunisians cite television as one of their sources for information on politics and current affairs
Radio	
• 58% of Libyans have a radio at home	• 77% of households own at least one radio
• 37% of Libyans report that they listen to the radio every day; almost half (45%) of men listen to the radio daily as compared with just a quarter of women	• 56% of Tunisian radio listeners say that they listen at least once a day
• 4% of Libyans cite radio as their main source of information	• 34% of Tunisians cite radio as one of their sources for information on politics and current affairs
Internet	
• 32% of Libyans report using the internet regularly (daily or weekly)	• 30% of Tunisians used the internet "today or yesterday", with a total of 42% reporting having used the internet within the last 12 months
• 10% of Libyans use international websites as a main source of information	• 60% of Tunisian internet users access the internet at least once a day
Social media	
• 58% of Libyans who have access to the internet have a Facebook account; this means that just over one in four Libyans (26%) have a Facebook account	• 80% of internet users use the internet to access social media sites
• 52% of Libyans who have a Facebook account report that they spend a lot or quite a lot of their time on Facebook reading Libyan national news	• 27% of Tunisians access Facebook at least once a day
	• 53% of Tunisian users of social media use it to receive news and other important information and opinions
Family and friends	
• 7% of Libyans named friends and family as their main source of information	• 50% of Tunisians cite friends as one of their sources for information on politics and current affairs; 43% mention family
• Friends and family are important supplementary sources of information	

A complex relationship between audiences and state broadcasters

Tunisia
- 91% of all Tunisians have watched one of the state broadcaster's channels within the past week
- 76% of the state broadcaster's audiences (72% of Tunisians) watch the news on the state channels

Libya
- The state broadcaster is the most popular channel in Libya, and one of the two most relevant television channels to Libyans' lives

Despite the upheaval in both countries' media sectors and an outpouring of new media outlets, this report has shown that the state broadcasters retain a privileged position in the minds of Libyans and Tunisians during the research period. In some ways this appears surprising, as it may be assumed that the people who tired of receiving the regimes' sanitised versions of events would look elsewhere for information when the opportunity arose. Indeed, much policy attention in the Middle East following the Arab Spring has focused on the arrival of the new private broadcasters on the scene and placed little attention on the state-run media behemoths. This report suggests that this is an oversight, as the state broadcasters – albeit weakened from their previous positions – remain the dominant players in the Libyan and Tunisian media landscapes. However, the relationship between Libyans and Tunisians and their state broadcasters is complex and difficult to characterise. On a number of occasions, Tunisians expressed their loyalty to the state broadcaster despite its shortcomings, treating it almost as a member of the family, if not a particularly likeable one.

The area where the state broadcasters are most influential is news programming. In Tunisia, the 8 pm bulletin is akin to a national institution: 76% of the state broadcaster's audiences (72% of Tunisians) watch the news on the state channels. While other broadcasters challenge and surpass the state broadcaster's programmes that address social issues, they are unable to challenge its place in the news cycle. In Libya too, the indications are that people watch the state broadcaster's evening news bulletin keenly, and it is often seen as viewing for the whole family.

Just because the state broadcaster may be like a member of the family, this does not exempt it from criticism. Libyans and Tunisians believe that their state broadcasters are too slow in covering stories, and that they often do not cover them at all. In both cases, a lack of newsgathering capacity is likely to be the cause. This is not surprising, as heavily controlled state broadcasters were primarily charged with covering the regime's movements, and were often told what to say.

Savvy and streetwise citizens

Tunisia
- 74% of Tunisians said that they are interested in news about politics and current affairs
- 56% of Tunisians surveyed said that they had some level of trust in the state broadcaster

Libya
- 73% of Libyans trusted the state channel while only 13% reported that they do not
- Keeping up-to-date with news and current affairs is important to Libyan audiences, who revealed that national news is most important to them: it is watched by 48% of the population
- Although international channels are least trusted by Libyans, there is recognition that they provide a useful secondary source of news

Libyans and Tunisians place little trust in the media. Our research indicates that Libyans and Tunisians are politically savvy and streetwise audiences who interrogate the sources of funding of media outlets to establish what agenda they might follow. Both audiences believe that media outlets have political agendas and are sceptical that they operate in the public interest. Again, in both places, people appear to draw some comfort from the state broadcaster as they feel that it is clear what that broadcaster's agenda is: supporting the state, even though it is unclear in Libya what this means. Where a broadcaster's agenda was unclear, it seems that this often causes unease as the audience does not know what agenda the media outlet is seeking to support.

When we look at people's trust in the media, we see that Libyans' level of trust in the state broadcaster is high compared with other national and international channels: 73% of Libyans trust the state channel while only 13% reported that they do not. Although this trust may be relative – focus groups expressed some mixed views on al-Wataniya's trustworthiness – this is nonetheless a significant finding. In Tunisia, the state broadcaster is not the most trusted – 52% of Tunisians hold some degree of trust in the broadcaster, while Hannibal and Ettounsiya have 56% and 62% respectively.

Levels of trust of international broadcasters differ in each country, with Tunisian audiences distrusting these broadcasters less (at least concerning BBC Arabic and France 24), and Libyan audiences distrusting them more. The latter is, perhaps, due to the fact that some Libyans feel that the international media has not always shown their revolution in a positive light

and believe that it has a tendency to exaggerate Libya's problems. Audiences consequently appear to be wary of its content. In a national survey in Libya, international media outlets had the highest levels of distrust among the broadcasters listed. In Tunisia, local channels are still the most trusted, but with French widely understood throughout the country, international channels broadcasting in French have long been part of media consumption.

Nevertheless, any discussion about levels of audience trust in the media is relative. The belief that media outlets are agenda-driven leads Libyan and Tunisian audiences to conclude that they must "shop around" to find and verify information. Our research indicates that Tunisians tend to rely on multiple sources of information to make sure that they are getting the full picture and a true representation of events happening in their country. Audiences in both countries turn to friends, family and the word on the street to supplement and verify the information they obtain from elsewhere. They trust their own and their peers' experience to make up for omissions, incomplete coverage and mistrusted information in mainstream media.

Some focus group participants said they watch the news on several different channels and compare the coverage, indicating a high level of media literacy among audiences. In Libya, where reports can often contradict each other, audiences also expressed confidence in their ability to discern what was going on by confirming, rejecting or validating stories from different media sources. Audiences in both countries pointed towards the utility of social media in this regard.

Social media: speed, depth and relevance

Tunisia
- Tunisians noted that social media offers more detailed and timely coverage than television

Libya
- Facebook was a significant source of information and news to over half of its Libyan users

- Libyan and Tunisian audiences noted that social media covers topics that are not on television

43. Facebook (2014)
[Accessed 28 August 2014].

44. Internet Live Stats (2014)
[Accessed 28 August 2014].

45. Facebook (2014)
[Accessed 28 August 2014].

With an estimated 4.6 million Facebook accounts located in Tunisia,[43] social media is an important part of Tunisians' media environment. Internet penetration is considerably lower in Libya – 22% in comparison with Tunisia's 45%[44] – yet there are now a reported 1.9 million Facebook accounts located in Libya.[45] This number is growing rapidly. BBC Media Action research indicates that social media dominates Libyan and Tunisians'

time online, and is sometimes used to cover the shortcomings of the traditional media. Tunisians, and to a lesser extent Libyans, are increasingly looking to social media for up-to-date information and more detail on stories that interest them, and which are not often found in television broadcasts. Social media also plays a key role in verification of information.

The familiar criticisms of the level and breadth of internet penetration can certainly be applied to Libya, where the internet is not easily accessed and where online speeds are very low (making it difficult to stream video or high-resolution content). However, the impact of social media is still felt. In a country where there remains little newsgathering, be it owing to a lack of resources or security concerns, Facebook, and to a much lesser extent Twitter, have become de facto newswires. This leads to its own problems since many reports contradict one another and there is no shortage of agendas, but many Libyans, like Tunisians, look to social media as their first port of call to keep up with events. People nonetheless retain a healthy scepticism of social media and, while trust levels in all forms of media are low, traditional media tends to command more trust than social media.

Accountability: the perils of the fourth estate

Despite the differences in their circumstances, this report has illustrated commonalities of attitudes towards media among Libyans and Tunisians. The main area where the two countries diverge is the threat of violence. While such threats exist in Tunisia, the Libyan context is far more volatile. When asked in focus groups, Libyans acknowledged that any media outlet that reported fairly and credibly, and that held powerful groups and individuals to account, would be a target for physical violence.

Tunisia
- Over half of Tunisians agree that media plays an important role in holding leaders to account, but the media's political agendas are seen as holding them back from really performing this role properly

Libya
- Libyans felt that broadcasters – state and private – did not have the skills to produce timely, accurate or investigative reports that held leaders to account
- Libyan focus group participants warned that reporting that is too truthful can cause conflict and encourage divisions and hatred among people; some suggested that the political situation in Libya is still too fragile for controversial issues to be discussed openly

As a result, it is unsurprising that the media is unable to provide the accountability mechanism that the Libyans seek. This has led to a distinct sense of pessimism, leading Libyans to question whether the kind of media they sought was feasible in present circumstances. While Tunisians share this pessimism, the barriers that the Tunisian media face are noticeably smaller, as they operate in a functioning state with at least a nascent regulatory framework and an independent regulator. In Libya, there is scarcely a state, let alone a framework for the media. In recent months there have been several incidents of journalists being killed, particularly in the east of the country.[46] Thus, while Libyans would like their media to be accurate and objective, they accept that it may not be a realistic proposition at this stage. But they are still frustrated – there remains an unreconciled tension between Libyans' demand for trustworthy and impartial information and their acceptance that present circumstances may not allow for this.

A desire for media to be a positive influence on society

Tunisia
- Tunisian audiences expressed a clear desire for media to help provide solutions to Tunisia's problems
- When Tunisian respondents were asked why they chose a particular programme as their favourite, the most common answer was that it was "useful to society"

Libya
- Focus group discussions in Libya suggested a desire for media to play a positive role in society by providing equal space for all Libyans, raising citizens' awareness of important issues and focusing on solutions

A common theme mentioned by Libyans and Tunisians across our research was the desire for their media to do something more than reporting the problems that their countries face. Instead, people want cause for optimism in their fledgling – and at times floundering – revolutions. This manifests itself in the desire to avoid conflict, which audiences often feel that the media actively stokes. As noted above, conflict is far more widespread and serious in Libya, where audiences fear the consequences of honest and truthful debate over controversial topics, such as the former regime, security or the role of religion in the state. Here, Libyans hope that media can soothe some of the fissures in their society, but are realistic as to what is currently possible.

Tunisians, meanwhile, have grown weary of politicians' propensity to resort to personal attacks rather than answer the questions asked of them, and the ineffectiveness of the media to hold them to account

46. Reporters Without Borders (2014c).

as a result. The media has the ability to do more, they feel. Tunisians were not, however, overly idealistic in their rebuke, feeling that their "ideal" broadcaster remained an unlikely "wish". At the same time, some Tunisians feel that the media has taken its newfound freedoms too far, and has broken moral and ethical codes by addressing inappropriate topics and social taboos. "They misunderstand freedom," said one focus group participant. Such comments indicate that Tunisians themselves remain divided on the level of freedom that the media should possess.

Implications for policy-makers and practitioners

Based on the audience research covered in this report, and of BBC Media Action's experience of operating in Libya and Tunisia, some implications for policy-makers and for future research can be drawn.

- It is crucial to support state broadcasters to become more independent, trusted public service broadcasters, especially in news and current affairs. Both these countries will need clear, consistent and coherent support to their media sectors in future years. All sections of the media – private and state, traditional and social, formal and informal – have played and are playing major roles in shaping post-revolutionary politics and society. However, a central finding of this report is that the state broadcasters remain an integral part of the media environment for Libyans and Tunisians. Al-Wataniya in Libya is the most trusted (73%) and one of the most relevant broadcasters for Libyan audiences. And, while Ettounsiya is the favourite channel of Tunisian audiences, it does not air regular news bulletins; 72% of Tunisians tune in to the news on Watania, the state broadcaster.

  Given the demands for impartial and accurate information in Tunisia and Libya, support should continue to be given to enable state broadcasters to work in the service of the public rather than the state, and particularly to improve their news and current affairs offering. It is here where they are most influential, and arguably where they are most needed.

- Programme makers should explore the production of solutions-focused programming. Libyans and Tunisians have grown weary of being told of the problems that their countries face and would welcome programming that was able to put forward views and opinions of those who are proposing potential solutions.

  Such programming may come in a number of guises and may vary by country. In a more volatile context such as Libya, an indirect approach using drama may be the most effective to foster progressive debate on taboo topics that Libyans believe would be too dangerous to cover elsewhere – such as the futures of those who were part of the Gaddafi regime and disarmament.

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Annex 1
Focus group discussion tool

Media should/Media shouldn't exercise

In order to facilitate discussion about public service broadcasting and the values associated with an ideal broadcaster, focus group participants in Tunisia and Libya were asked to take part in a card sorting exercise, arranging the phrases shown in Table 1 under the headings "media should" and "media shouldn't", and discussing the reasons for each selection.

Table 1: Cards used in Media should/Media shouldn't exercise

Tunisian and Libyan groups	
Represent diverse views	Prioritise the views of some people over others [eg highly educated people or people who fought in the revolution]
Be truthful, even if this might upset some people	Be truthful only if it won't upset anyone
Be independent of political parties and religion	Portray the ruling parties/official opinion first
Represent all Tunisians/Libyans	Give more powerful ethnic or religious groups more coverage
Produce content that appeals to all Tunisians/Libyans	Produce content that caters to the interest of specialist groups
Give particular attention to minority groups	Not pay attention to groups that are in a minority
Be funded by the state	Be funded by the private sector
Tunisian groups only	**Libyan groups only**
Only cover topics and stories that give a positive message or example	Contribute to national identity
Cover all topics and stories, even if they might give a negative message or example	Be independent of national biases
Only cover topics and stories that unify Tunisians	Contribute to regional identity
Cover all topics and stories, even those that could be divisive	Be independent of regional biases
	Be solution focused
	Raise questions that are difficult to answer
	Give both sides of the story, even if this might cause conflict
	Only give positive messages in order to avoid conflict

Annex 2
Methodology

1. Tunisia

National survey
BBC Media Action commissioned a Tunisian agency to conduct a nationally representative survey of Tunisians in June 2013. The aim was to obtain data about media consumption as well as the audience's attitudes to information sources and media outlets, including the state broadcaster.

A nationally representative sample of 1,000 Tunisians was drawn,[47] and interviews were carried out face-to-face at the respondents' homes. This sample provided a margin of error of ±3.8% (calculated for a prevalence of 50%). To guarantee that the sample was representative of the actual Tunisian population, strata were employed for all 24 provinces. Following this, a multi-stage self-weighting cluster sampling approach was used to select Primary Sampling Units (PSUs), which were the Tunisian "delegations". This cluster sampling approach used data from the 2004 Tunisian Census (as updated in 2009).

To ensure good geographical representation, the PSUs were split into secondary sampling units (SSUs) based on key geographical districts. Within the SSUs, geographical starting points (schools, shops, mosques, etc.) were selected at random. The sample was not self-weighting at this stage due to lack of population data at SSU level. Within the SSUs, household selection utilised the "random walk" method, whereby the direction from a predefined stating point was random, and following this direction was determined by following the left hand/right hand rule. Sampling at the household level was determined using a Kish grid. The selected respondents were screened in order to ensure that they were aged over 15 and had been resident in Tunisia for six months or more. The data was assessed in relation to the census, against urban/rural, district and gender distributions and no statistical imbalances were identified, and thus weighting was not applied.

Audience focus group discussions
Focus groups on news
BBC Media Action commissioned a Tunisian agency to conduct 12 audience focus groups on the topic of news coverage in the media and, in particular, television news bulletins. Participants represented a mixture

47. The original sample size planned was 1,000 but after data entry and data cleaning the final total was a sample size of 999.

of ages, and equal numbers of men and women were recruited. In some locations, separate groups were held for men and women, while in others the groups were mixed. Groups were held in urban and rural locations across Tunisia (Tunis, Bir Ali Ben Khalifa, Sidi Bouzid, Kasserine and Beni M'tir) with six in December 2013 and six in March 2014.

Focus groups on media consumption and public service broadcasting
A further 14 audience focus groups were held across Tunisia (Tunis, Gabes, Kairaouan, Kebili, El Kef, Ksibet El Mediouni, Sfax and Sousse) in March 2014 to review media consumption in Tunisia. Participants were asked to take part in a card sorting exercise in order to facilitate discussion about the values associated with an ideal broadcaster. As in the news focus groups, in some locations separate groups were held for men and women, while in others the groups were mixed. Also, some groups were recruited on the basis of age (those aged above 30 and those aged under 30). However, there is too much variation of the demographics across all the groups for us to be able to report findings according to the different socio-demographic criteria.

2. Libya

National surveys
FCO-commissioned national survey
The UK Foreign and Commonwealth Office (FCO) in Tripoli commissioned a nationally representative survey of 3,196 Libyans in March–April 2013, primarily focused on media consumption patterns and audience attitudes towards different media and information sources. The sample size provided a margin of error of ±1.7% (on a prevalence of 50%).

To guarantee the sample was representative of the actual Libyan population, the sample was stratified by district (*shabiyah*), using data from the 2006 Libyan census, and the 2013 population pyramid estimated by the United States Census Bureau to ensure good geographical coverage of the country. In addition to the national-level survey, five of the most important Libyan cities – Tripoli, Benghazi, Misrata, Zuwarah, and Sabha – were purposively selected, and their sample size was bolstered to enable analysis within these areas of particular interest. Weighting was employed using the 2006 Libyan census to ensure that it was representative on key demographics, and the cities in our booster sample had a representative size in the analysis. Specific strata were defined to include, for each district, equal numbers of male and female respondents from five different age bands, starting at 16 years old.

BBC Media Action was given access to the original survey instruments and datasets for the purposes of analysis.

BBC Media Action-commissioned national survey

BBC Media Action commissioned a nationally representative survey of 1,146 Libyans in August 2013. The sample size provides a margin of error of ±2.9% on a prevalence of 50%. This survey primarily covered attitudes towards and knowledge of the constitution-building process and also asked a small number of media consumption questions. In order to use the data in a comparative way, the same sampling technique was used for BBC Media Action's survey as for the FCO survey. Weighting was employed using the 2006 Libyan census to ensure representativeness on key demographics.

For both surveys, data was collected via telephone from strata representing all 22 districts of the country. Telephone surveys were believed to be the preferable method in the Libyan context for a number of reasons, including the safety and security of interviewers, increased accessibility to all segments of the population (mobile phone penetration among Libyans is over 90%), the feeling of anonymity created by a phone interview helped to alleviate fears about answering political questions and allowing women to speak with men who are not family members without constraint.

Audience focus group discussions

Six focus group discussions were conducted by a research agency on behalf of BBC Media Action during March 2014. Conducting focus groups in Libya can be challenging due to security concerns and socio-cultural norms. For this reason, recruitment relied on building a trusting relationship with the individual concerned so that that he or she felt comfortable visiting the facility/location, and it was conducted using a snowball mechanism within the constraints of a quota system. Care was taken not to favour the "NGO" class – people who may regularly participate in focus groups or have views that would differ from the "normal" population.

Recruitment in Benghazi and Misrata was more difficult than in Tripoli and therefore no women were included in this part of the sample. Marital status was controlled for as a proxy to identify the participants' role within the family dynamic, so one group was made up of younger married men (up to 40 years), one of older married men (40 years and above) and one of young single men (up to 26 years), and the same for the three groups of women.

Participants were asked a range of questions about important issues in Libya and the media's response to them, as well as questions about public service broadcasting in Libya. They were also asked to take part in the Media should/Media shouldn't exercise.

Analysis of quantitative data (surveys)

Data was entered by the agencies in Tunis and Tripoli and cleaned and analysed by BBC Media Action researchers in London using descriptive statistics in SPSS. Where differences in response between different demographic or socio-economic groups have been mentioned throughout the reports, these have been tested to confirm that they are statistically significant differences. Differences that are apparent in charts and tables but that are not noted in the text of the report are not necessarily statistically significant.

Analysis of qualitative data (focus group discussions)

Focus group discussion data was analysed using a framework approach to draw out the main themes and trends across the groups. Analysis of Tunisian data was carried out from transcripts of the focus group discussions provided by the agency in English, while in the case of Libyan data analysis was carried out from the recordings of the discussions.

Limitations of the data

While the research methodologies adopted are sound and data quality has been assured throughout, it is important to acknowledge the limitations of the data we have, and therefore the limitations of any conclusions that can be drawn from it. These include:

- **There is limited comparability of data sources** as each was originally designed for different purposes and each adopts a different methodology and sampling strategy. While each survey dataset was nationally representative, and approaches ensured participants had a random and equal chance of being selected, the statistical precision (confidence in results) differs due to varying sample sizes. This is detailed above, with the margin of error for each dataset ranging between 3.8% and 1.7%. Furthermore, for both Libya datasets participants were recruited through mobile phones, meaning that those who do not have mobile phone access are not represented in the findings. The Tunisia sample does not have this limitation. Similarly, the data from the different sets of focus groups can only be compared up to a certain point.

- **There are gaps in what the data can tell us on certain issues** because the research instruments used were originally designed to answer different research questions. There are therefore some aspects of our research objectives that we could only answer in part, or that were not explored in sufficient detail, or that were not explored in the ideal way to allow us to draw more certain conclusions.

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