

The Algerian media landscape
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**Summary of key results from
a nationwide survey**

October 2018

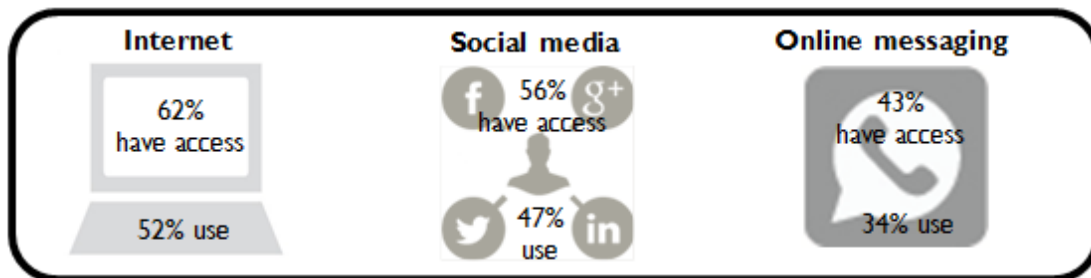
I. Increasing importance of the online space

- Just over half of all Algerians (52%) say they use the internet and just under half (47%) say they use social media – this is much higher for younger people - around two-thirds of those aged under 35 use the internet and social media, rising to around 80% for those aged 16-24.
- Most access the internet mainly through their phones.
- The most common barriers to using the internet are not having access to the internet all the time, not having enough data or it being too expensive.
- The most common reasons for using the internet are using social media, keeping in touch with friends, searching for information, video streaming and sending emails. Fewer people use it for accessing news.
- Just under half of the Algerian population (48%) has an active Facebook profile and around four in ten use Facebook Messenger (43%) and YouTube (39%). Those aged 16-24 are more likely to have a Facebook, YouTube and Instagram profile than those in older age groups.
- Eight in ten (82%) Algerians with an active social media profile agree that social media provides people with the opportunity to experience different opinions and viewpoints.

Overall use of internet and social media

Almost two thirds (62%) of Algerians say they have access to the internet, but just over half (52%) say they use it. Just under half (47%) say they use social media and a third (34%) of Algerians say they use online messaging platforms (e.g. WhatsApp).

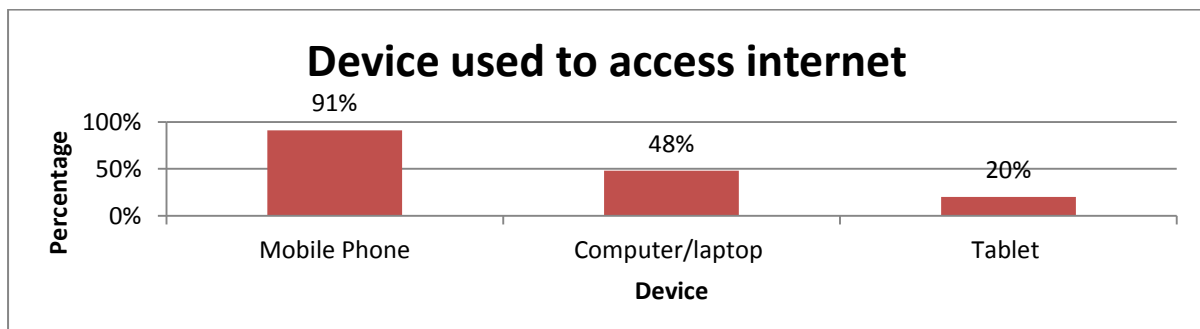
FIGURE 1: OVERALL INTERNET, SOCIAL MEDIA & ONLINE MESSAGING USE



Among those that use the internet, the most common device to access it is mobile (91% of those that use the internet use a mobile to do so), followed by a computer/laptop (48%) then a tablet (20%).

FIGURE 2: DEVICE USED TO ACCESS INTERNET

Base: Those with access to the internet (1858) Q: On which devices do you have an internet connection?



Use of internet, social media and online messaging by demographics

Across internet, social media and online messaging, usage is higher among men, those in urban locations and those with higher education and income levels.

Younger people (those aged under 35) also have much higher usage than the older generations, with around two-thirds of those aged under 35 using the internet and social media, rising to around eight in ten for those aged 16-24. This compares to less than half of 35-59 year olds and less than 20% of those aged 60 and above using the internet and social media. Online messaging follows a similar pattern, though at lower overall levels of use.

FIGURE 3: USE OF INTERNET, SOCIAL MEDIA AND ONLINE MESSAGING BY GENDER, LOCATION AND AGE

Base: All respondents (3010); Male (n=1514); Female (n=1496); Urban (n=2046); Rural (n=964); 16-19 (n=243); 20-24 (n=341); 25-34 (n=768); 35-59 (n=1247); 60+ (n=411). Q: Can you please tell me which of the following you have access to (at home or elsewhere) INTERNET/SOCIAL MEDIA/ONLINE MESSAGING? How frequently do you use the following?

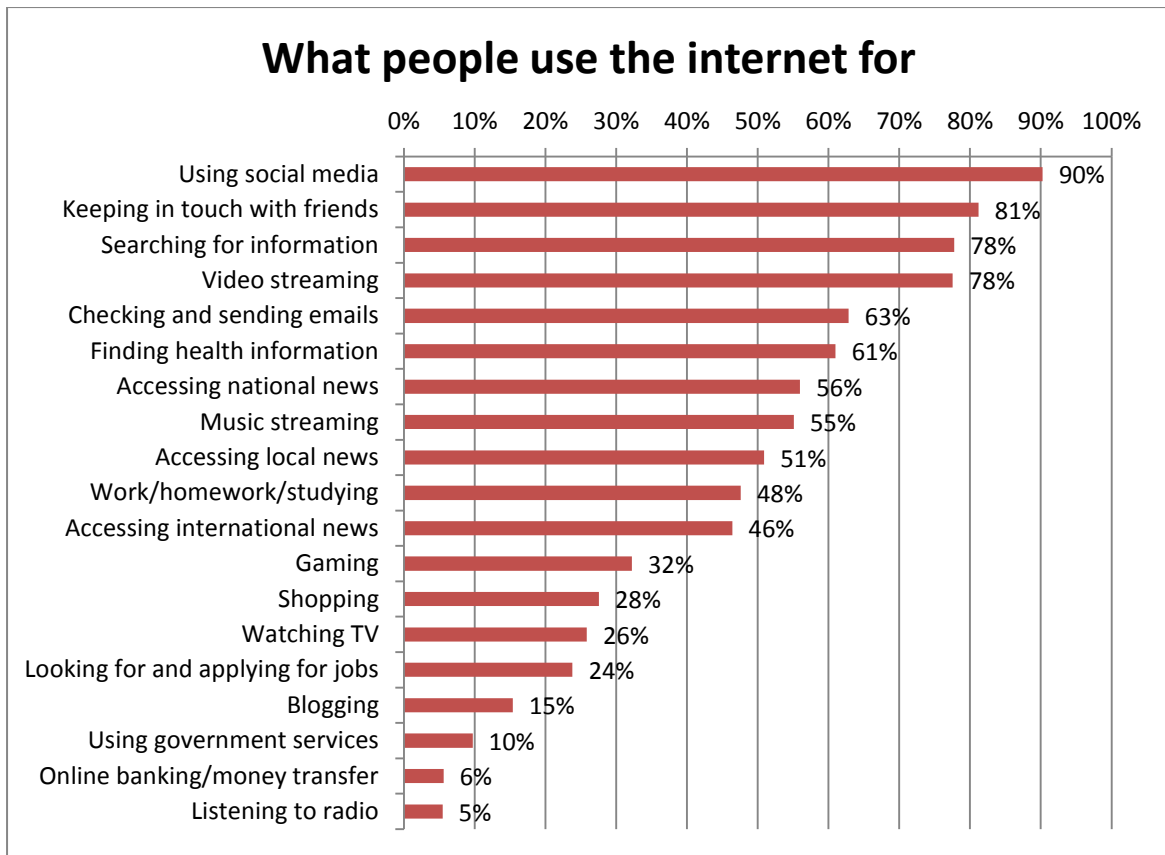
Use of media (within last 12 months)	Overall	Gender		Location		Age group				
		Male	Female	Urban	Rural	16-19	20-24	25-34	35-59	60+
Internet	52%	59%	45%	59%	38%	77%	81%	69%	41%	14%
Social media	47%	56%	39%	53%	36%	77%	83%	67%	34%	5%
Online messaging service	34%	40%	28%	40%	20%	54%	62%	46%	24%	7%

What do people use the internet for?

Among those that use the internet, the most common reasons for doing so are using social media (90%), keeping in touch with friends (81%), searching for information (78%), video streaming (78%) and sending emails (63%). Around half of those that use the internet access national news (56%), local news (51%) or international news (46%) online. Around a quarter (26%) say they watch TV online.

FIGURE 4: WHAT PEOPLE USE THE INTERNET FOR

Base: Those who use the internet (1556) Q: Which, if any, of these do you use the internet for?

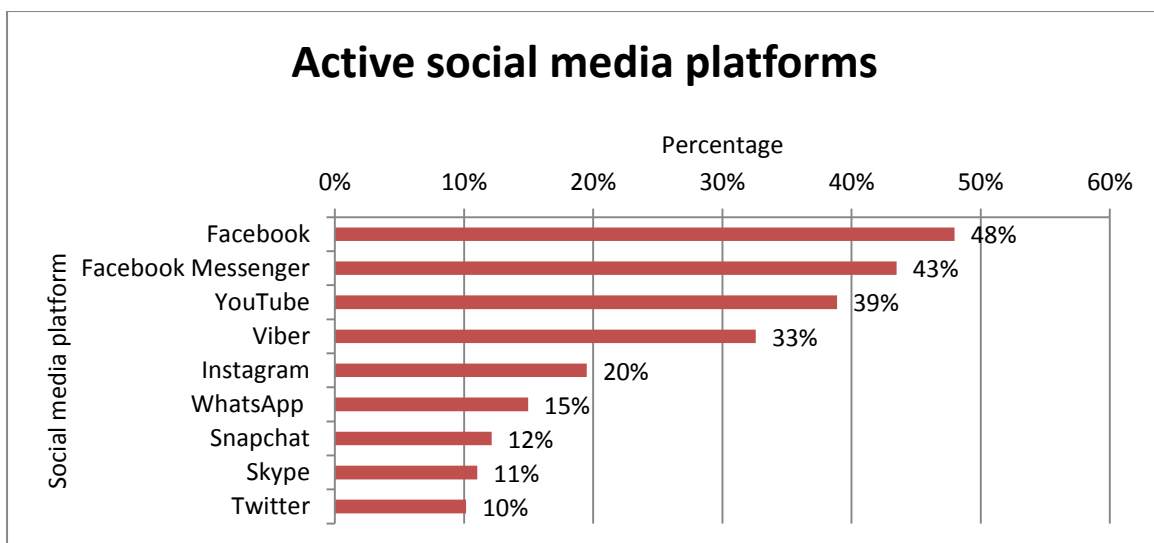


What social media platforms do Algerians use?

Just under half of the Algerian population (48%) has an active Facebook profile and around four in ten use Facebook Messenger (43%) and YouTube (39%). A third (33%) use Viber and one in five (20%) use Instagram. Less than one in five Algerians uses WhatsApp (15%), Snap Chat (12%) or Twitter (10%).

FIGURE 5: ACTIVE SOCIAL MEDIA PLATFORMS

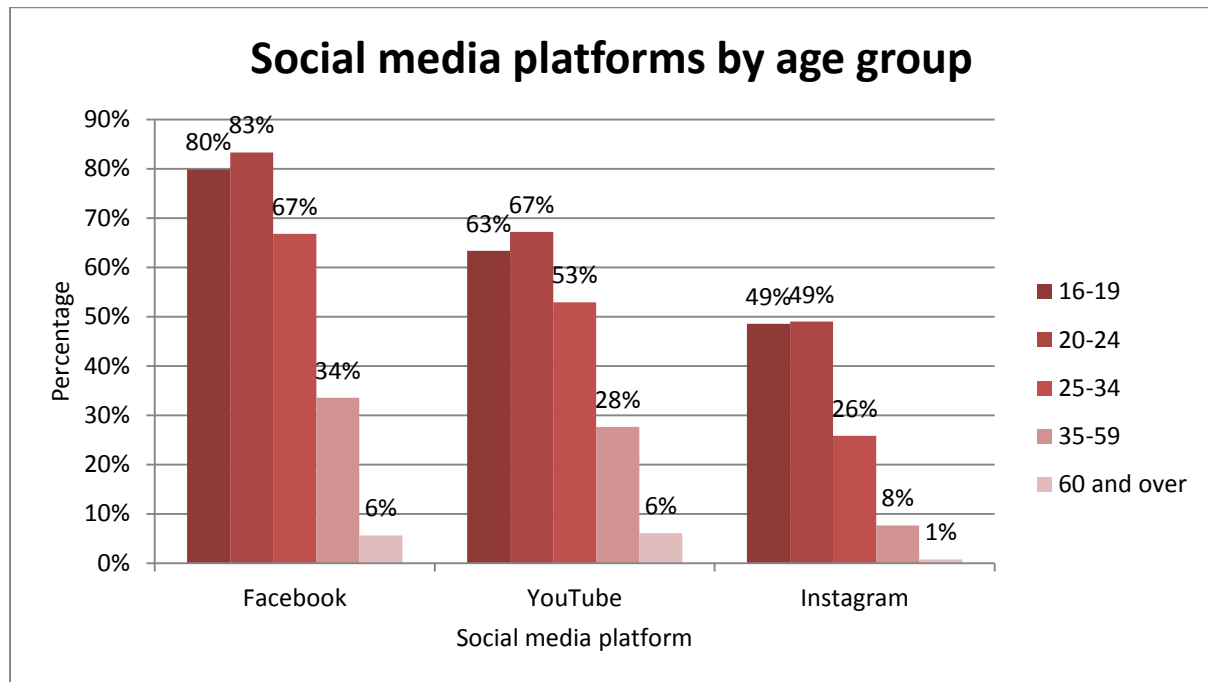
Base: All (n=3010) Q: Could you tell me for which social media or messaging apps or platforms you have an active profile?



Those aged 16-24 are more likely to have a Facebook, YouTube and Instagram profile than those in older age groups.

FIGURE 6: ACTIVE SOCIAL MEDIA PLATFORMS (FACEBOOK, YOUTUBE AND INSTAGRAM) BY AGE GROUP

Base: All respondents (n=3010); 16-19 (n=243); 20-24 (n=341); 25-34 (n=768); 35-59 (n=1247); 60+ (n=411). Q: Could you tell me for which social media or messaging apps or platforms you have an active profile?



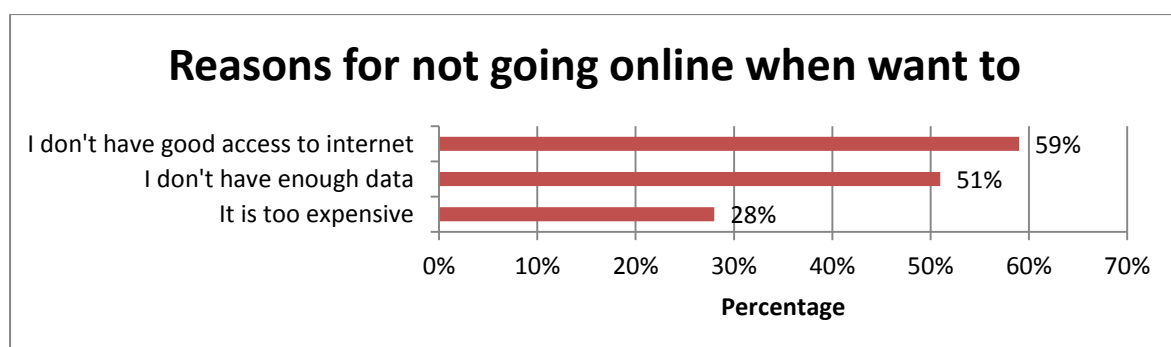
Barriers to going online

Of those that said they have access to the internet (62% of all Algerians), just under half (47%) said there are certain reasons which mean they are not able to go online when they would like to.

The most common were that they do not have access to the internet all the time (mentioned by 59% of those who said they have access to internet sometimes) or that they do not have enough data (mentioned by 51%). Around a quarter (28%) said it is too expensive.

FIGURE 7: REASONS FOR NOT GOING ONLINE WHEN WANT TO

Base: Those with access to the internet (1858). Q: Are there any reasons for you not going online when you want to? [UNPROMPTED]



Views and attitudes on social media

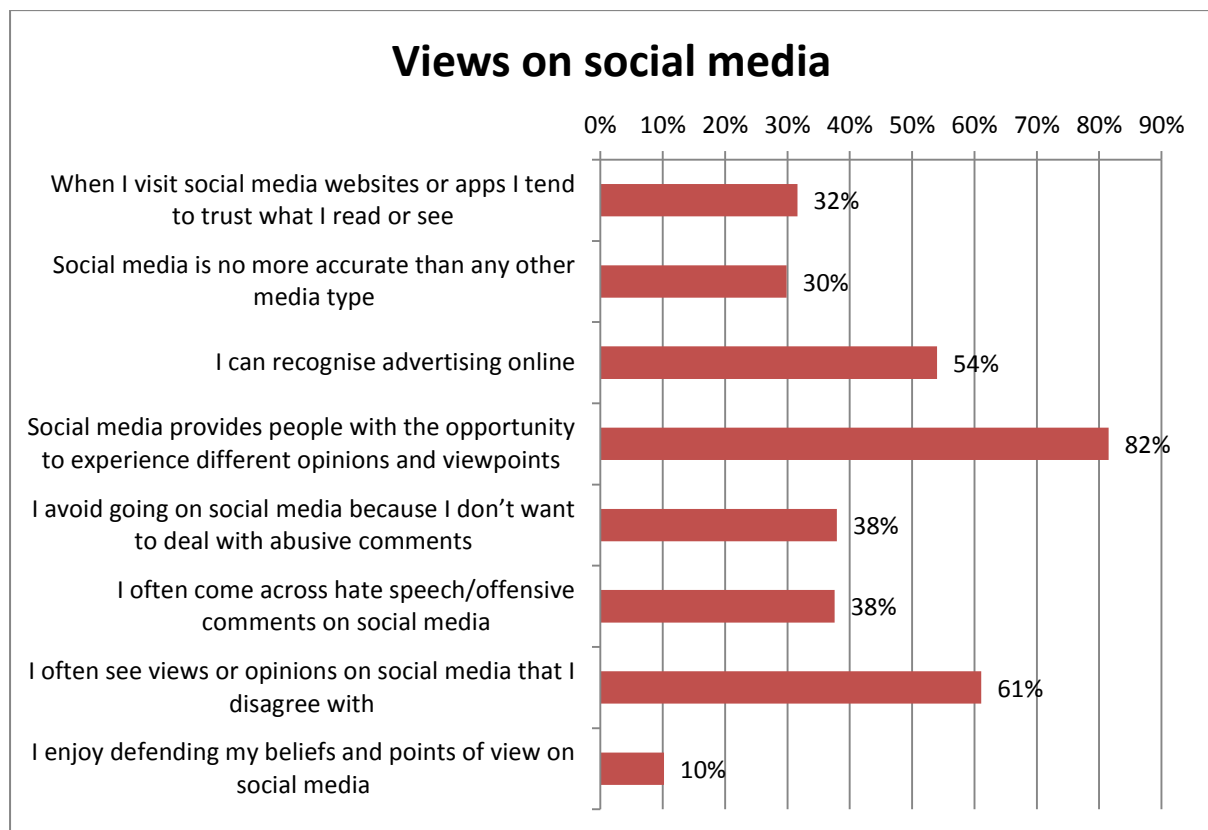
Those that have an active social media profile were asked a series of questions on their views and attitudes about social media.

Less than a third (32%) agreed that they trust what they read or see on social media while four in ten (38%) agreed that they sometimes avoid going on social media because they do not want to deal with abusive comments and that they often come across hate speech/offensive comments on social media.

Eight in ten (82%) agreed that social media provides people with the opportunity to experience different opinions and viewpoints and just under two-thirds (61%) agreed that they often see views or opinions on social media that they disagree with. However only 10% agreed that they like defending their beliefs and point of view on social media.

FIGURE 8: VIEWS ON SOCIAL MEDIA

Base: Those with an active social media profile(s) (n=1444) Q: I am going to read out several statements. For each one I would like you to tell me whether you agree or disagree with the statement – so would you say you 'strongly agree', 'agree', 'neither agree nor disagree', 'disagree' or 'strongly disagree'?



2. Relevance of topics covered by the media

- Only half of Algerians agree that the media covers topics that are relevant to their everyday lives (48%) and presents different points of views about issues (52%).
- Young people are less likely to agree that the media covers topics that are relevant to their everyday lives (41%) and only four in ten agree that the Algerian media provides content that is representative of young people.
- Only four in ten (44%) women agree that the Algerian media provides content that is relevant to women, youth and people with disabilities.

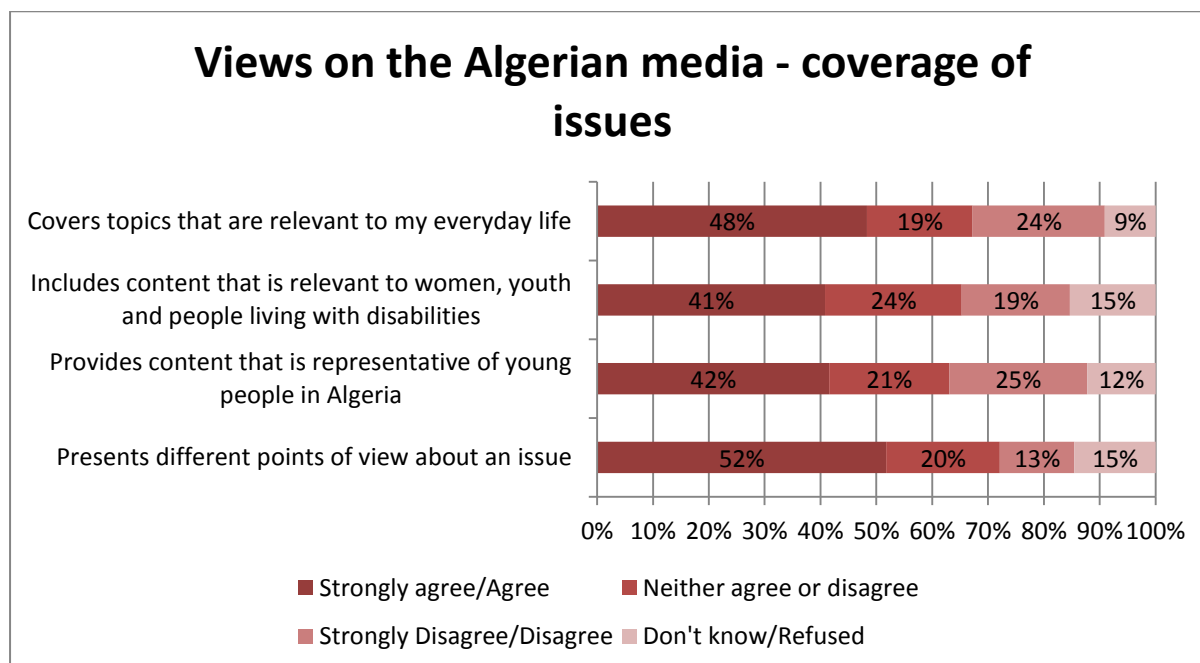
Just under half (48%) of respondents agree that the Algerian media covers topics that are relevant to their everyday life, while a quarter (24%) disagree with this statement.

Around four in ten (41%) respondents feel that the Algerian media includes content that is relevant to women, youth and people living with disabilities and that it provides content which is representative of young people (42%). However there were sizeable proportions of respondents who disagreed with these statements (19% and 25% respectively).

Around half of Algerians (52%) agree that the media presents different points of view about issues.

FIGURE 9: VIEWS ON ALGERIAN MEDIA - COVERAGE OF ISSUES

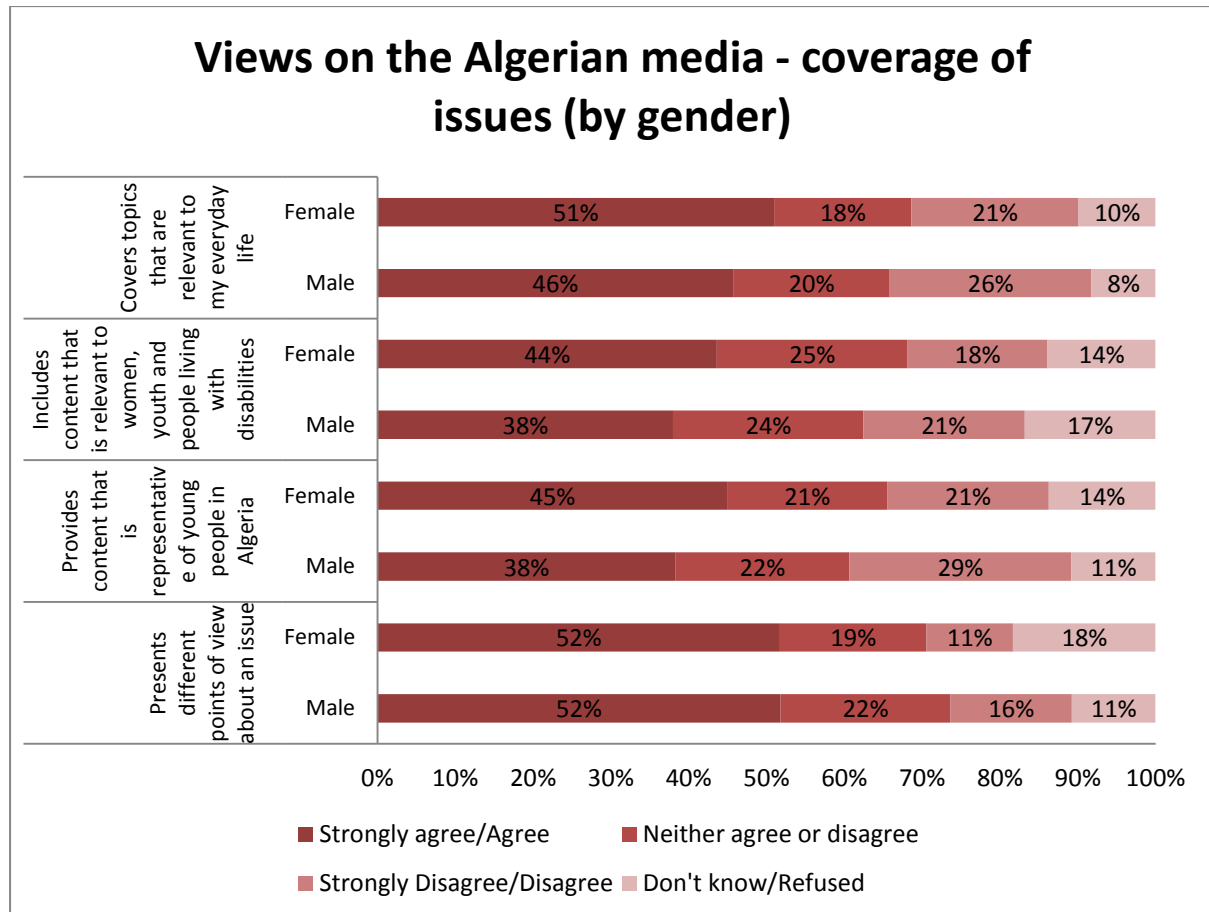
Base: All respondents (n=3010) Q: I am going to read out several statements. For each one I would like you to tell me whether you agree or disagree with the statement. OR Q: Thinking about the Algerian media in general, to what extent do you agree or disagree with each of the following statements?



Women are slightly more likely (44%) to agree that the Algerian media provides content that is relevant to women, youth and people living with disabilities than men (38%) and that it provides content that is representative of young people (45% compared to 38% of men).

FIGURE 10: VIEWS ON ALGERIAN MEDIA – COVERAGE OF ISSUES (BY GENDER)

Base: All respondents (n=3010); Male (n=1514); Female (n=1496). Q: I am going to read out several statements. For each one I would like you to tell me whether you agree or disagree with the statement. OR Q: Thinking about the Algerian media in general, to what extent do you agree or disagree with each of the following statements?

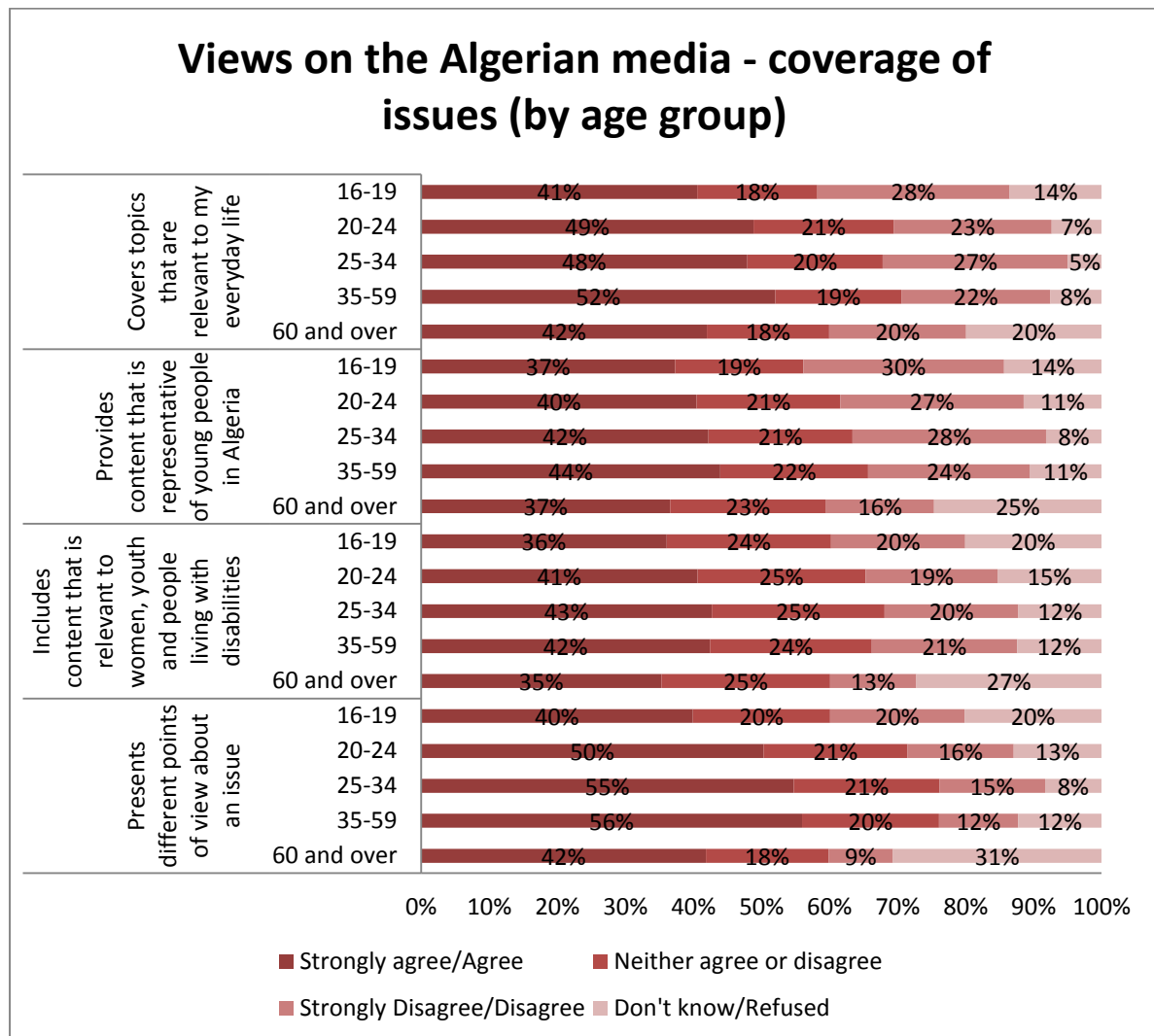


Those in the youngest age group (16-19) are the least likely to agree that the media covers topics that are relevant to their everyday lives (41% compared to an average of 48%). They are also least likely to think the Algerian media presents different points of views about issues (40% compared to 52% overall).

Among the young population (16-34) around four in ten agree that the Algerian media provides content that is representative of young people in Algeria and includes content that is relevant to women, youth and people with disabilities, however this is lowest among the youngest age group of 16-19 year olds (37% and 36% respectively).

FIGURE 11: VIEWS ON ALGERIAN MEDIA - COVERAGE OF ISSUES (BY AGE GROUP)

Base: All respondents (n=3010); 16-19 (n=243); 20-24 (n=341); 25-34 (n=768); 35-59 (n=1247); 60+ (n=411).



3. What Algerians want from the media in future

- When asked to think about the future of the media in Algeria and how it could best meet their needs (responses were unprompted), the most common request was for the Algerian media to provide impartial (mentioned by 28%) and accurate (27%) news, information and journalism – this was requested more by men, those in urban areas and those in older age groups.
- The second most common request was for the Algerian media to focus more on solutions to issues rather than just covering problems (26%).
- Women and young people were more likely to request that the Algerian media feature the kind of programmes they like and cover topics that are relevant to their life, suggesting an unmet need among these audiences.
- Another common request was for the Algerian media to better reflect Algerian society (mentioned by 25%).

Respondents were asked to think about the future of media in Algeria five years from now, and say how they would like the Algerian media to meet their needs. The most common requests were for the Algerian media to provide impartial (28%) and accurate (27%) news, information and journalism.

People also said they would like the Algerian media to focus more on solutions to issues rather than just covering problems (26%) and to provide content that is representative of Algerian society (25%).

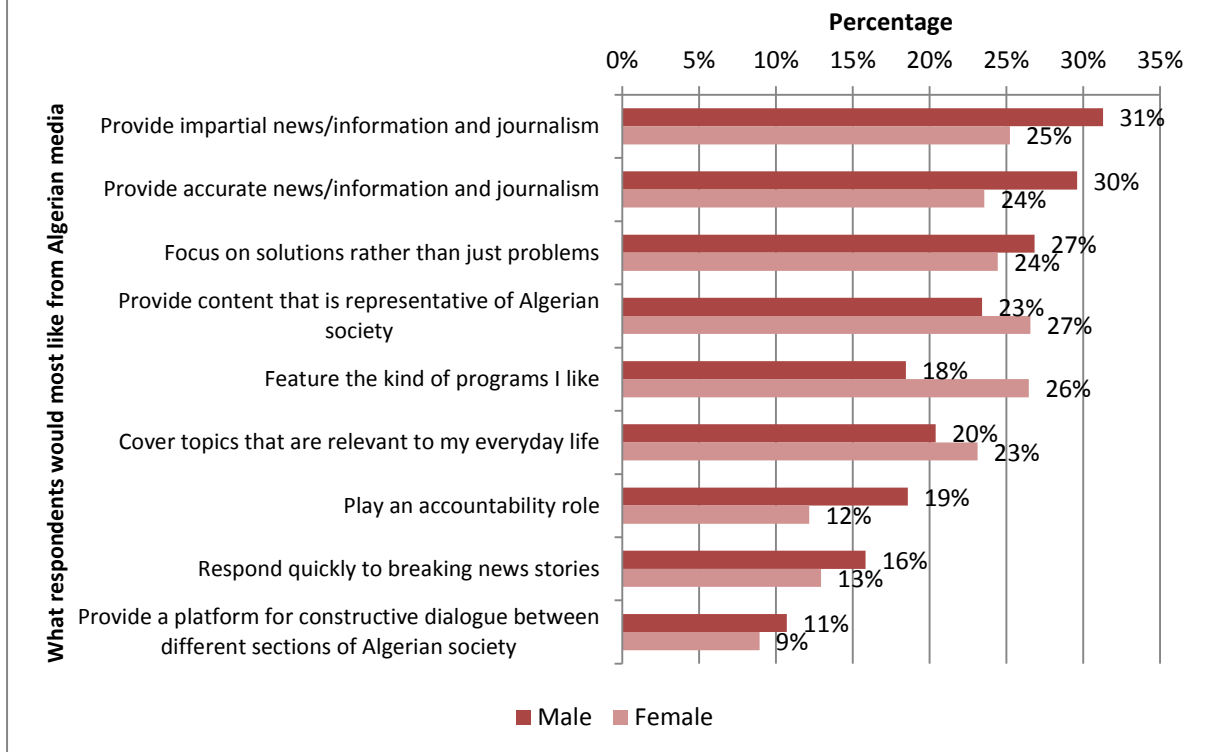
Around one in five (22%) Algerians said they would like the Algerian media to feature the kind of programmes they like and cover topics that are relevant to their life.

Men were more likely to say they would like the Algerian media to provide impartial and accurate news, information and journalism. Conversely women were more likely to say that they would like the Algerian media to feature the kind of programmes they like and cover topics that are relevant to their everyday life.

FIGURE 12: WHAT ALGERIANS WOULD LIKE FROM THE MEDIA IN FUTURE BY GENDER

Base: All respondents (n=3010); Male (n=1514); Female (n=1496). Q: Now we would you to think about the future of media in Algeria. Five years from now, how would you like the Algerian media to meet your needs? Please tell us the three characteristics you think are most important to you [unprompted, up to three suggestions].

What people would like from the Algerian media in future by gender

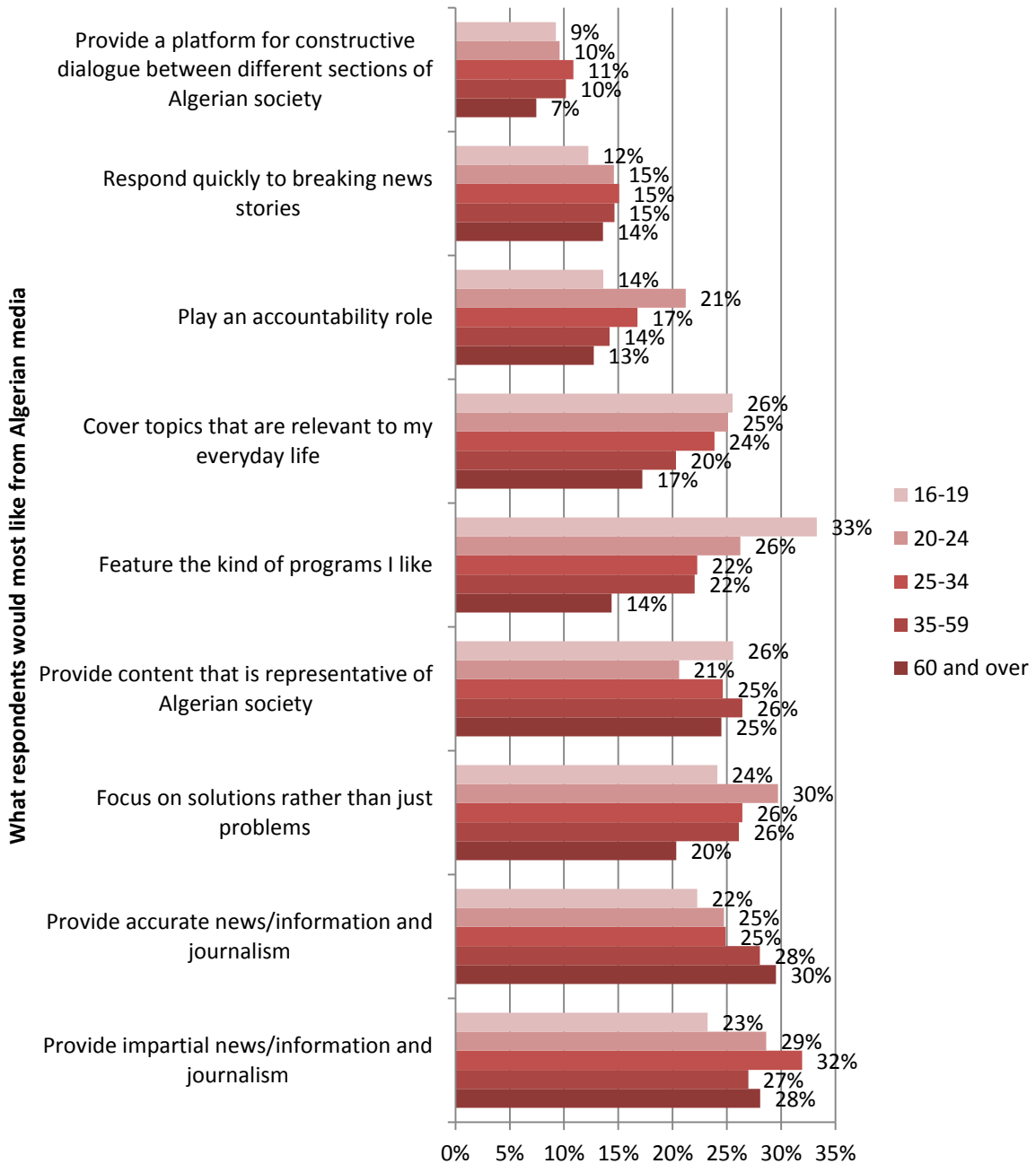


Among the different age groups, those in the youngest age group (16-19) were less likely to request that the Algerian media provide accurate and impartial news, information and journalism than those in older age groups but were most likely to request that it provides the kind of programmes they like and covers topics that are relevant to their lives.

FIGURE 13: WHAT ALGERIANS WOULD LIKE FROM THE MEDIA IN FUTURE BY AGE GROUP

Base: All respondents (n=3010); 16-19 (n=243); 20-24 (n=341); 25-34 (n=768); 35-59 (n=1247); 60+ (n=411). Q: Now we would you to think about the future of media in Algeria. Five years from now, how would you like the Algerian media to meet your needs? Please tell us the three characteristics you think are most important to you [unprompted, up to three suggestions].

What people would like from the Algerian media in future by age group



4. Preferences for different types of programmes

- Overall, the most preferred types of programme to watch on TV are national news and drama/serials (both mentioned by 38% of those that watch TV), followed by sports and movies (both 25%), local news (20%), documentaries and cooking (both 18%).
- Women are more likely to watch dramas/serials (65% compared to 12% for men), cooking programmes (35% compared to 1%) and women's programmes (29% compared to 15%).
- Younger (16-34) audiences prefer dramas/serials, movies, sports, documentaries and comedies.
- The most preferred types of programmes to listen to on radio are national news (mentioned by 40% of those that listen to radio), local news (38%), religious programmes (32%), music programmes (30%) and programmes on societal issues (22%).
- Younger audiences (16-34) are most likely to prefer listening to programmes on music or comedy. Interest in local or national news increases with age, as does interest in religious programmes.
- Women are more likely to listen to religious programmes (35% compared to 30% of men), music (33% compared to 27%), programmes on societal issues (27% compared to 19%) and women's programmes (27% compared to 2%).

Preferred types of programmes on TV

Overall, the most preferred types of programme to watch on TV are national news and drama/serials (both 38%), followed by sports and movies (both 25%), local news (20%), documentaries and cooking (both 18%).

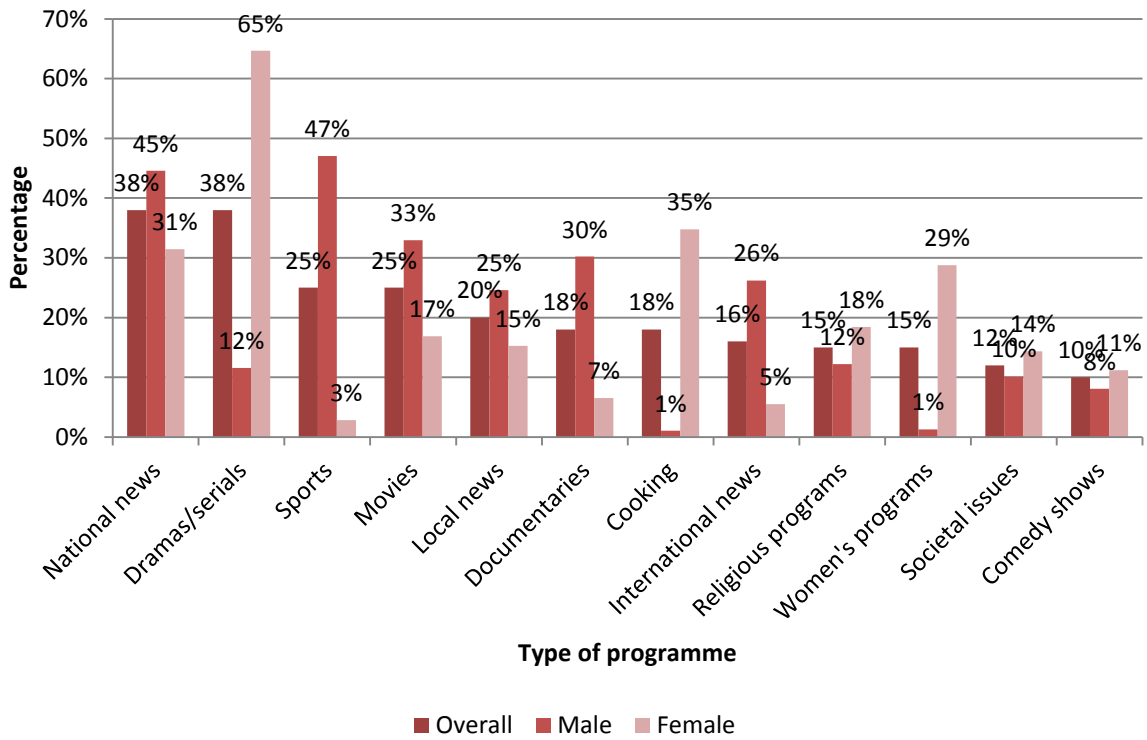
There were significant differences by gender, as Figure 14 shows. Men are more likely to watch national news (45% compared to 31% for women), sports (47% compared to 3%), movies (33% compared to 17%) local news (25% compared to 15%) and documentaries (30% compared to 7%).

Women are more likely to watch dramas/serials (65% compared to 12% for men), cooking programmes (35% compared to 1%) and women's programmes (29% compared to 15%).

FIGURE 14: MOST PREFERRED TYPE OF PROGRAMME ON TV OVERALL AND BY GENDER

Base: Use TV (n=2841); Male (n=1427); Female (n=1414). Q: What types of programmes do you like watching on TV? You can mention up to three types of programme [Multi-code response, up to max of three]

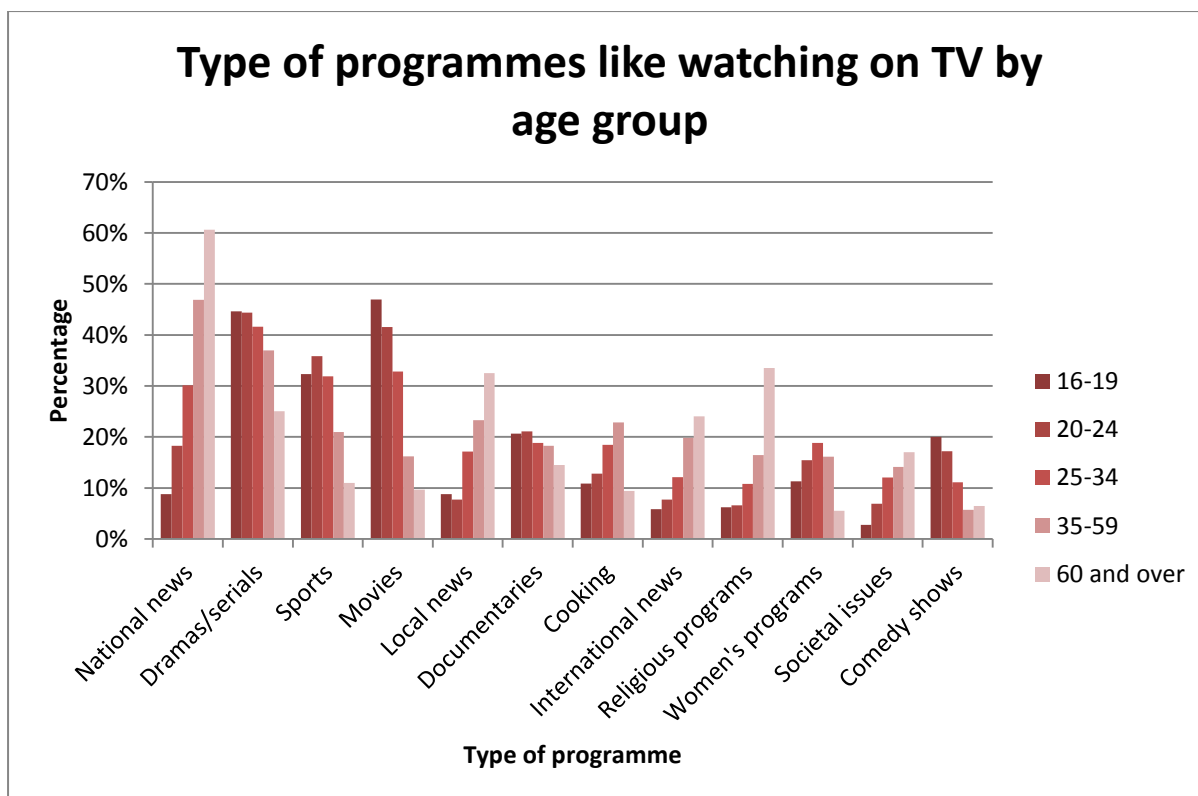
Type of programmes like watching on TV overall and by gender



The most preferred types of TV programmes among younger (16-34) audiences are dramas/serials, movies, sports, documentaries and comedies. In contrast the most popular type of TV programme for older audiences (35 and above) is national news.

FIGURE 15: MOST PREFERRED TYPE OF PROGRAMME ON TV BY AGE GROUP

Base: Use TV (n=2841); 16-19 (n=231); 20-24 (n=323); 25-34 (n=722); 35-59 (n=1194); 60+ (n=372). Q: What types of programmes do you like watching on TV? You can mention up to three types of programme [Multi-code response, up to max of three]



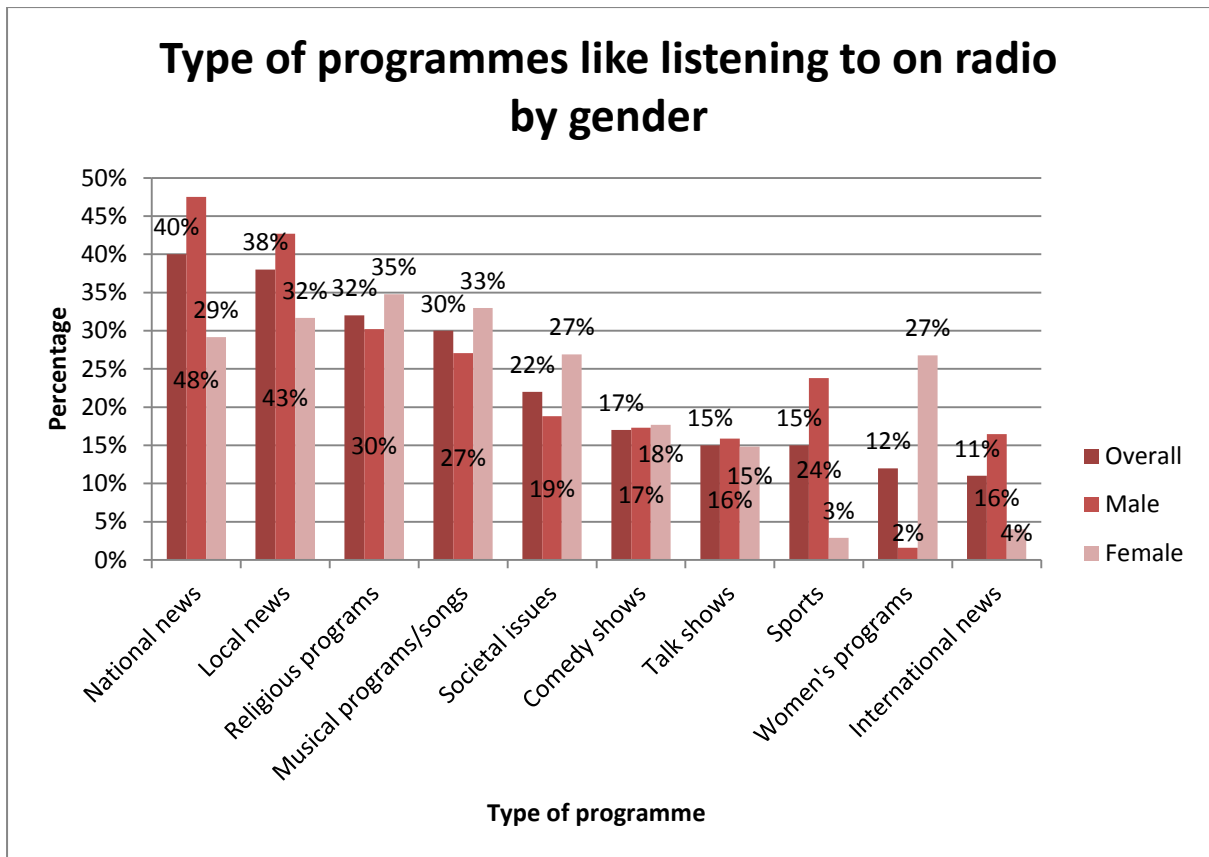
Preferred types of programmes on radio

Overall the most preferred types of programmes to listen to on radio are national news (40%), local news (38%), religious programmes (32%) music programmes (30%), programmes on societal issues (22%), comedy shows (17%), talk shows (15%), sports (15%) women's programmes (12%) and international news (11%).

There are significant differences by gender, with men more likely to listen to programmes on national news (48% compared to 29% for women), local news (43% compared to 32%), sports (24% compared to 3%) and international news (16% compared to 4%). Women are more likely to listen to religious programmes (35% compared to 30%), music (33% compared to 27%), programmes on societal issues (27% compared to 19%) and women's programmes (27% compared to 2%).

FIGURE 16: MOST POPULAR TYPE OF PROGRAMME TO LISTEN TO ON RADIO OVERALL AND BY GENDER

Base: Listen to radio (n=820); Male (n=480); Female (n=340). Q: What types of programmes do you like listening to on radio? You can mention up to three types of programme... [Multi-code response, up to max of three]

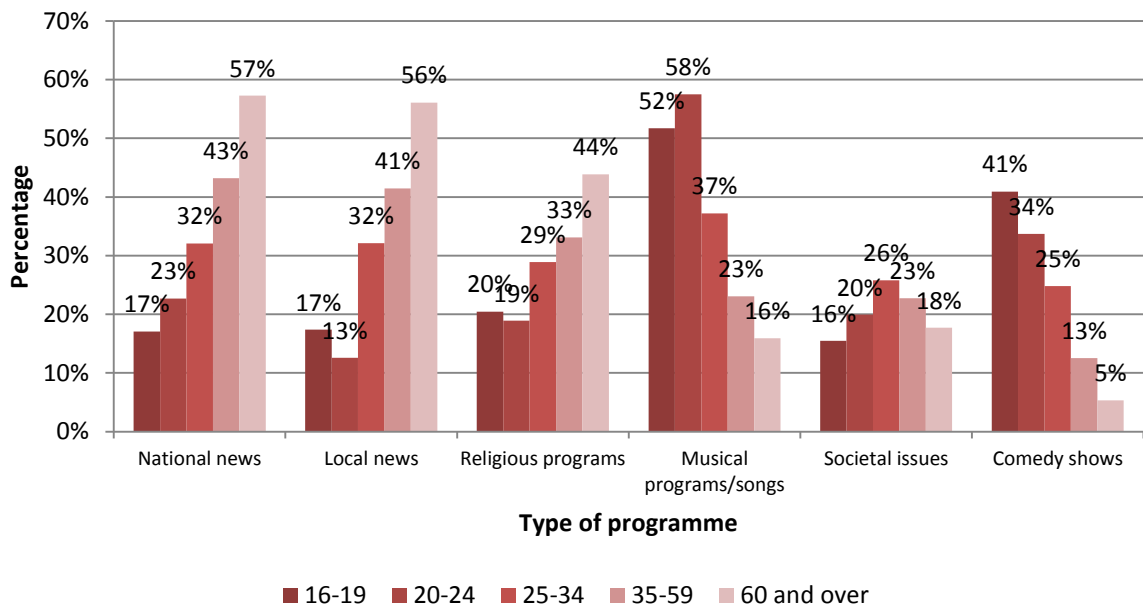


Interest in local or national news increases with age, as does interest in religious programmes. Younger audiences (16-34) are most likely to prefer to listen to programmes on music or comedy.

FIGURE 17: MOST PREFERRED TYPE OF PROGRAMME TO LISTEN TO ON RADIO BY AGE

Base: Listen to radio (n=820); 16-19 (n=40); 20-24 (n=62); 25-34 (n=187); 35-59 (n=405); 60+ (n=124). Q: What types of programmes do you like listening to on radio? You can mention up to three types of programme [Multi-code response, up to max of three]

Type of programmes like listening to on radio by age



5. TV viewing and radio listening times

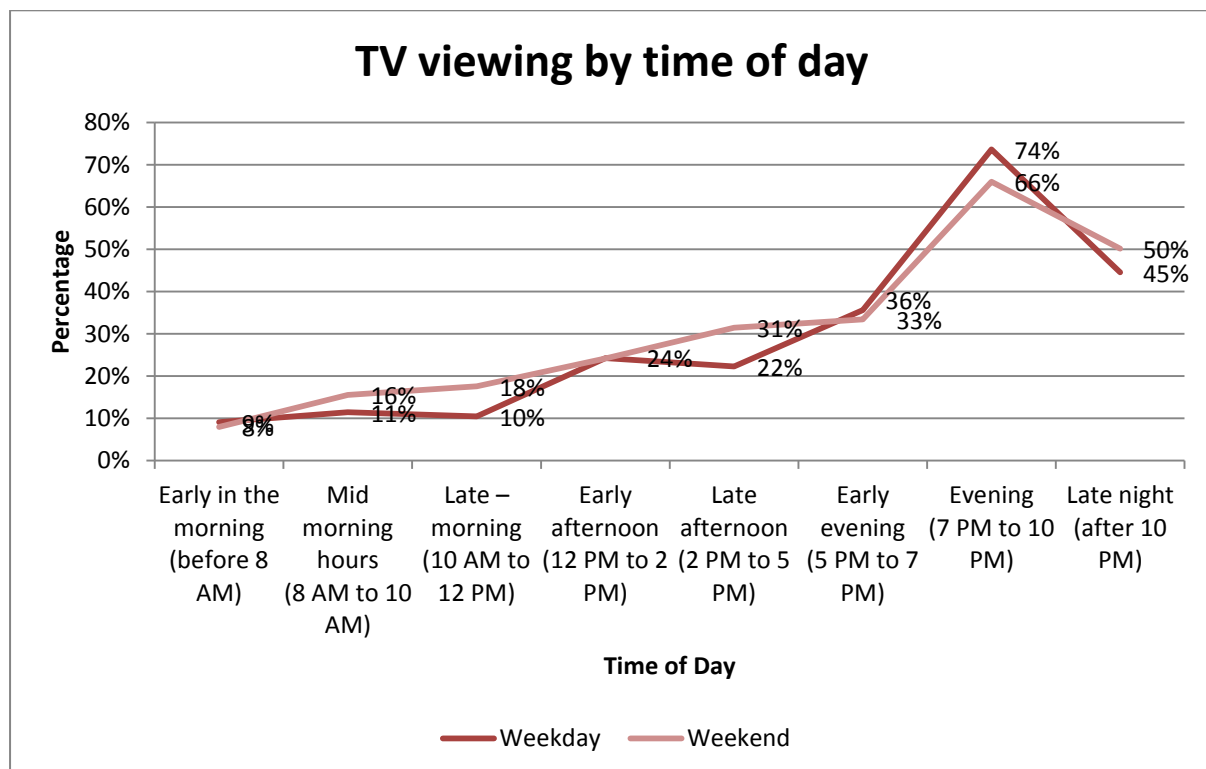
- Television viewing times follow a similar pattern during the week and at weekends, with viewing increasing steadily throughout the day to a peak in the evening (7pm-10pm). Men and those aged 16-34 are more likely to watch TV late at night.
- Radio listening times follow a broadly similar pattern during the week and at weekends, with the peak listening time during the early and mid-morning slots.
 - Women are more likely to listen during the mid and late morning slots than men both during the week and at the weekend.
 - Younger (16-24) radio audiences are less likely to listen during the morning and more likely to listen in the late night slot than older audiences.

TV viewing times

Television viewing times follow a similar pattern during the week and at weekends, with viewing increasing steadily throughout the day to a peak in the evening (7pm-10pm).

FIGURE 18: TV VIEWING BY TIME OF DAY

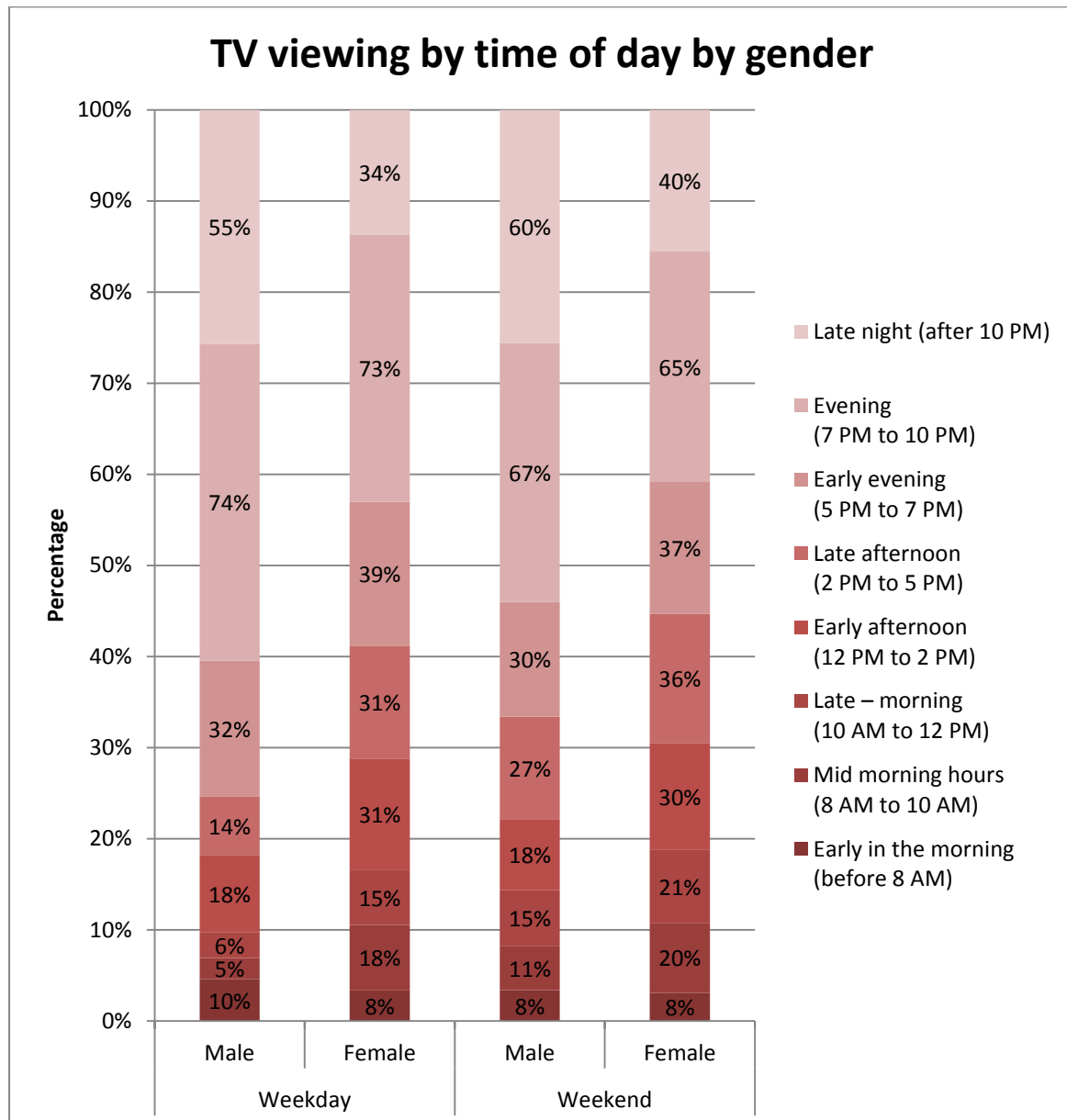
Base: Use TV (n=2841). Q: On a typical weekday (Sunday-Thursday) when you are watching TV, at what times do you watch? Q: On a typical weekend (Friday and Saturday) when you are watching TV, at what times do you watch? [Multi-code response]



Men are more likely to watch TV late at night than women (55% compared to 34% during the week and 60% compared to 40% at the weekend). Conversely women are more likely to watch TV in the mid-morning to early afternoon time slots (8am – 2pm) than men are.

FIGURE 19: TV VIEWING BY TIME OF DAY BY GENDER

Base: Use TV (n=2841); Male (n=1427); Female (n=1414). Q: On a typical weekday (Sunday-Thursday) when you are watching TV, at what times do you watch? On a typical weekend (Friday and Saturday) when you are watching TV, at what times do you watch?...[Multi-code response]



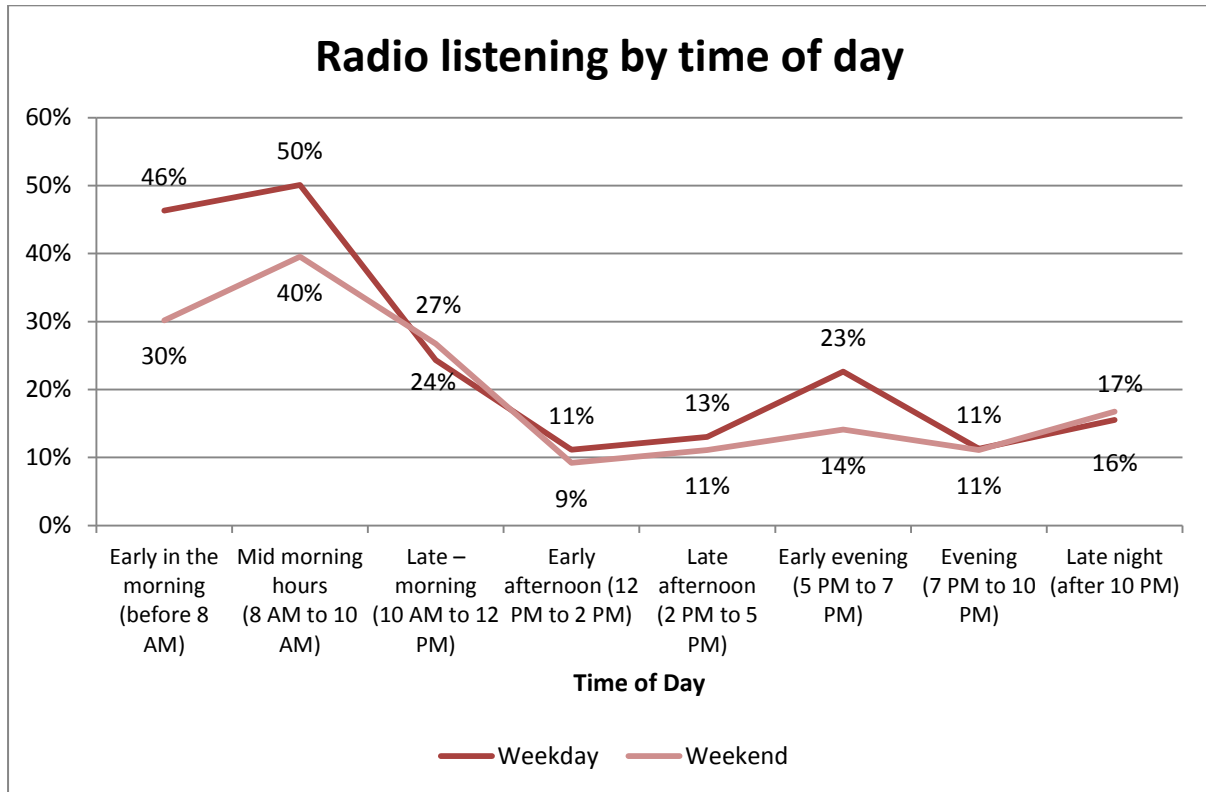
Those aged 16-34 are more likely to watch TV late at night than those in the older age groups (both during the week and at the weekend).

Radio listening times

Radio listening times follow a broadly similar pattern during the week and at weekends, with the peak listening time during the early and mid-morning slots. Peak listening is higher during the week than at the weekend and there is also more of an early evening audience during the week than at the weekend.

FIGURE 20: RADIO LISTENING BY TIME OF DAY

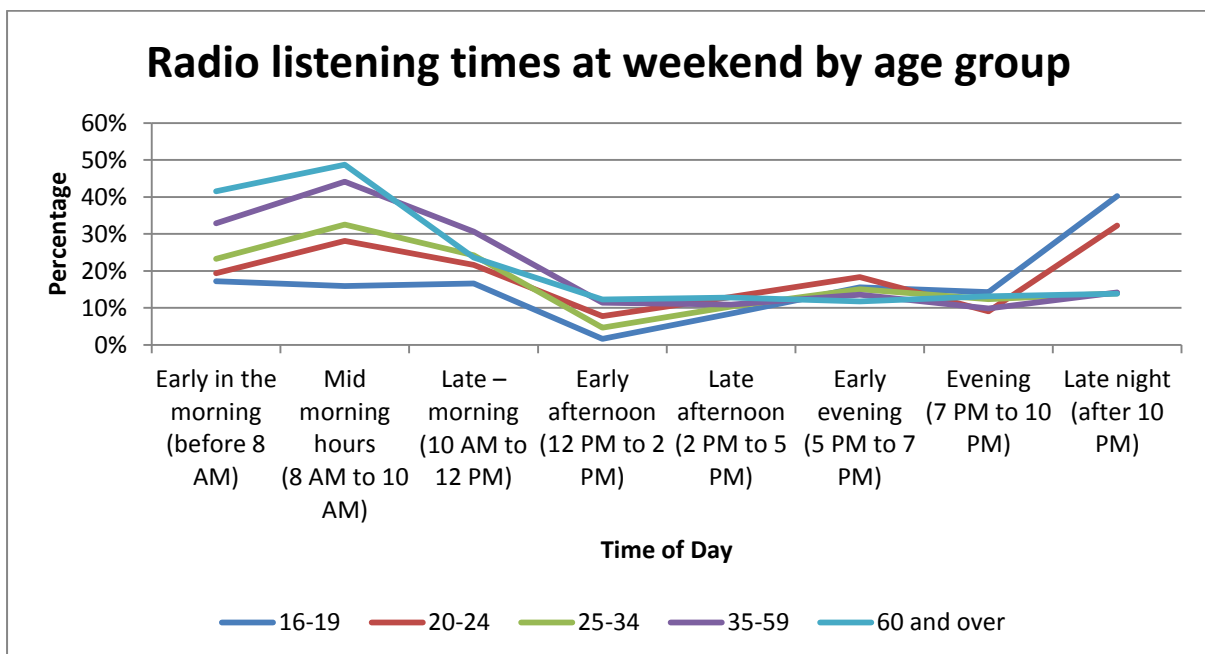
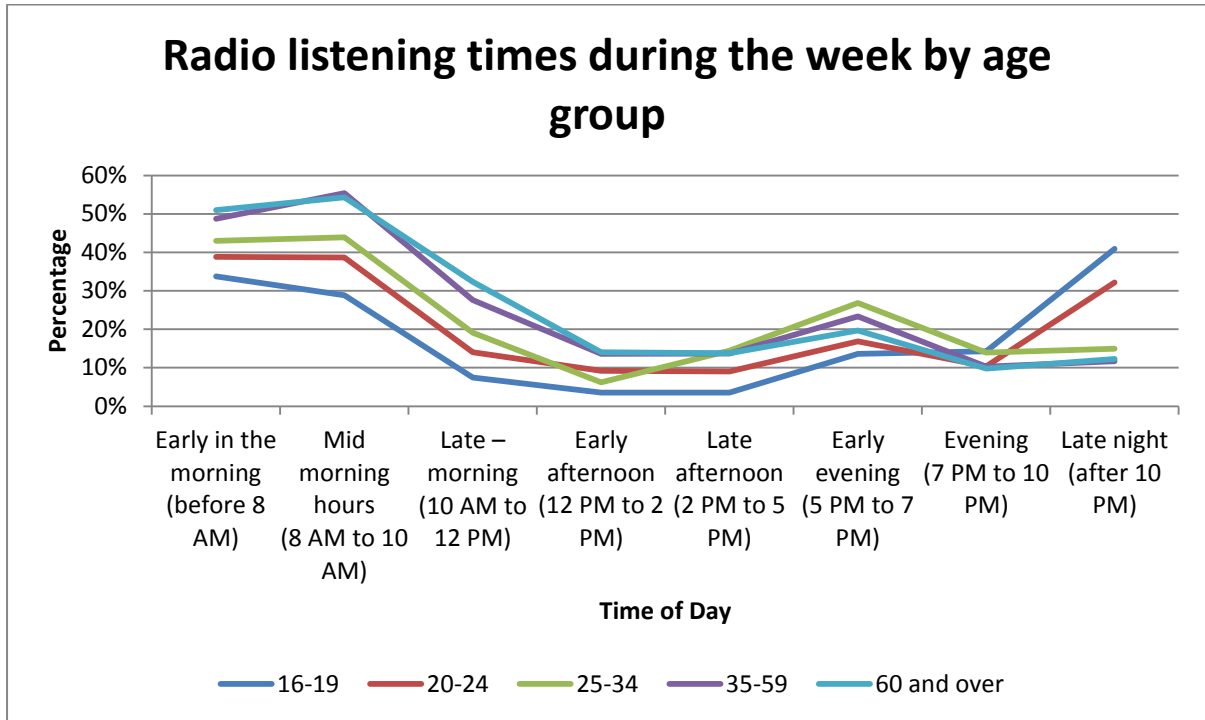
Base: Listen to radio (n=820). Q: On a typical weekday (Sunday-Thursday) when you are listening to the radio, at what times do you listen? Q: On a typical weekend (Friday and Saturday) when you are listening to the radio, at what times do you listen? [Multi-code response]



Younger (16-24) radio audiences are less likely to listen during the morning and more likely to listen in the late night slot than older audiences.

FIGURE 21: RADIO LISTENING BY TIME OF DAY AND AGE GROUP

Base: Listen to radio (n=820); 16-19 (n=40); 20-24 (n=62); 25-34 (n=187); 35-59 (n=405); 60+ (n=124). Q: On a typical weekday (Sunday-Thursday) when you are listening to the radio, at what times do you listen? On a typical weekend (Friday and Saturday) when you are listening to the radio, at what times do you listen? [Multi-code response]



Appendix I: Details of the research

Methodology

A large scale nationally representative (aged 16 and above) household survey was conducted throughout Algeria in May and June 2018. The total sample size for the survey was 3010 respondents.

The sampling approach was based on the sampling plan for a previous nationally representative survey¹, which was based on the 2008 Algerian Census. This stratified the sample by the seven Espaces de Programation Teritorials (EPTs) of Algeria and the number of urban and rural districts within each EPT. The Primary Sampling Unit (PSU) was the district. Twenty interviews were conducted per district. At the household level, the KISH grid method was used to select one respondent from each household.

Fieldwork was conducted by CREAD (Research Centre in Applied Economics for Development), with supervision from BBC Media Action. Interviews were conducted face-to-face using paper-based surveys. The survey was designed in English and was translated and back-translated (to allow for checks) into Arabic.

Weighting was applied to the data by age and gender, using the Algerian Office of National Statistics population estimates for 2018. This data was only available at the national level, so was applied to the whole sample rather than within regions. The overall sample was representative by regional and urban/rural split.

Data was analysed by BBC Media Action's research teams in North Africa and London. Descriptive analysis was conducted to analyse responses to questions across the whole sample and by key demographics. Chi Squared tests were used to examine whether these differences were significant.

¹ STEPS survey undertaken by the World Health Organisation (WHO) and the Algerian Ministry of Health