LIBYA MEDIA ASSESSMENT: ONE YEAR LATER
An Assessment of the Media Landscape and Consumption Patterns

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ABBREVIATIONS

BBC  British Broadcasting Network
BBN  Benghazi Broadcasting Network
BTV  Benghazi TV
CFI  Canal France International
FCO  Foreign and Commonwealth Office
GMA  General Media Association
GMC  Ghad Media Corporation
GNC  General National Congress
IMS  International Media Support
IWPR  International War and Peace Reporters
JANA  Jamahiriyah News Agency
KII  Key Informants Interviews
LJBC  Libyan Jamahiriyah Broadcasting Corporation
NTC  National Transitional Council
LTT  Libyan Telecom and Telecommunications
OTI  Office of Transition Initiative
PI   Paired Interview
RSF  Reporters Sans Frontières

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EXECUTIVE SUMMARY

The overall objective of the research is to provide the Foreign & Commonwealth Office and its Libyan Government counterparts with an updated assessment of the Libyan media landscape that measures consumption habits, perceptions of trust towards certain outlets, and attitudes towards government involvement in Libyan media, leading to recommendations for improving communication between the Libyan Government and the Libyan people.

This report is a collection of the most informative results from this research, which was conducted across Libya’s 22 districts between February and April 2013. Overall, the project involved interviewing 3,196 randomly-selected Libyans with a 65-question questionnaire, together with 26 Paired Interviews and 40 Key Informant Interviews covering most of the influential television, radio and publications outlets.

Two years after the revolution, the Libyan media sector is witnessing a phase of relative stabilisation, as leading media outlets have achieved financial stability and have acquired a brand and a status in the eyes of the Libyan population. Public outlets are most likely to witness substantial changes in their funding and their status in the months to come as the Ministry of Media will start to regulate and progressively re-appropriate government and local council outlets across the country. Of the privately-run media outlets, a handful of powerful private outlets are now well acknowledged by Libyans, although their programmes—in particular television and radio shows—clearly suffer from a lack of branding, as most Libyans remain unable to name and distinguish precisely their favourite programmes or presenters.

Media consumption pattern analysis shows that frequently-consumed satellite television and internet are the most important sources of information, and to a lesser extent, radio and publications. Libyans are overall most accessible through satellite television, and are increasingly consuming Libyan channels compared to one year ago. As international television focuses less on Libyan news than in the aftermath of the revolution, Libyans are inclined to consume it for entertainment while relying more on Libyan television to satisfy their thirst for local and national news. Although easily accessible, radio is not seen as a primary source of information but as a medium of entertainment, especially through popular ‘morning shows’. With a quarter of the population online every day, internet consumption is much higher than expected, especially for Libyan youth living in urban areas. When browsing the web, Libyans spend most of their time on Facebook, and to a lesser extent on video sharing websites or instant messaging online services. Newspapers remain poorly consumed and find their biggest readership amongst middle-aged and older Libyans living almost exclusively in Tripoli and Benghazi.

Audience and preference analyses highlight the emergence of a series of top outlets within each media category, with important variations across cities, ages and genders that should be kept in mind when designing communication strategies in Libya. Among them, the national television channel Al Wataniyah has gained significant popularity since 2012, notably for representing ‘all Libyans’ and thus appearing to be without hidden agendas in the eyes of the Libyan population.

Finally, the analysis of drivers of trust and expectations towards media shows that messages are best understood and communicated when framed in a way that strongly respects Libyan traditions, without divisive content or specific agendas. This points to a future role of the government in ensuring media outlets’ transparency to the Libyan people. Indeed, one of the main findings of this research is the unified call from Libyans for media outlets to be transparent about their funding, and for the Ministry of Media or the government to regulate this.
INTRODUCTION

The Libyan media sector has great potential to bolster Libya’s democratic transition by providing reliable, balanced and timely information to the population, and by informing and educating the Libyan population about the broader political process. International donors have an opportunity to support the development of the Libyan media sector by facilitating training, helping to create dynamic programming, and encouraging the right regulatory environment.

However, the consumption patterns and influence of Libyan media are still poorly understood, and the landscape mapping is outdated. Between December 2011 and February 2012, Altai Consulting conducted Libya’s first quantitative media survey, which was widely used by donors to support their media development engagements. Over the last 12 months, there have been substantial changes in the media sector in Libya, including the demise, creation, professionalisation and politicisation of outlets, which has caused shifts in trust and preferences. With this in mind, Altai was tasked by the Foreign & Commonwealth Office (FCO) to conduct an update of the last media survey, with substantial methodological enhancements.

This report aims to deliver to the FCO and its Libyan Government counterparts an updated and even more reliable assessment of the Libyan media landscape and consumption patterns. It presents the most informative results from quantitative and qualitative research conducted across Libya between February and April 2013. The study focused on mapping the media landscape, analysing audience preferences and consumption patterns, and gaining a deeper understanding of the effects of the media sector development. This has led to several modest recommendations for optimising messages that aim to support Libya’s political transition. Field research was comprised of a statistically representative phone survey with 3,196 respondents, and a set of qualitative research modules, including Paired Interviews with general media consumers and specific case studies focusing on intensive social media users.

This report builds on other media assessments, particularly Reporters Without Borders’ The Birth of Free Media in Eastern Libya (April 2011), Internews’ Libya Media Assessment (June 2011), IMS’ Media in North Eastern Libya (July 2011), IREX’s Media Sustainability Index (2009) and the Legatum Institute’s Libya Media Wiki (2012).

The report proceeds as follows: first, there is an explanation of the research scope and methodology. This is followed by a primer on Ghaddafi-era media and a summary of post-revolution media structures. Then, there is a brief analysis of the survey respondent profiles before the results are presented, starting with the Libyan population’s primary sources of information and levels of access to media, and followed by landscapes and consumption habits of television, radio, publications and social media. Then, there are brief assessments of trust in the media and the government’s role in the media. Finally, the report concludes by highlighting project findings and identifying areas of opportunity for media development.
Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013

Access to Media, Frequency of Use and Main Sources of Information

Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns

Social Media Landscape and Consumption Patterns

Print Media Landscape and Consumption Patterns

Trust and Distrust Regarding Political Information

Government Role in the Media

Summary of Key Findings

Areas of Opportunity
1 RESEARCH SCOPE AND METHODOLOGY

1.1 RESEARCH SCOPE

The overall objective of this research is to provide the Foreign & Commonwealth Office (FCO) and its Libyan Government counterparts with a detailed and reliable assessment of the Libyan media landscape and consumption patterns at a national level as well as in five ‘key cities’ (Tripoli, Benghazi, Misrata, Zuwarah and Sabha).

In particular, the scope of the research was to:

- Identify key public and private media institutions, at a national level and in the five key cities, and identify the changes that have occurred over the last twelve months
- Identify the major Libyan public and private media outlets, including printed media (daily and weekly newspapers and magazines), radio, terrestrial and satellite television, and online outlets
- For the top five most popular outlets in each media category, identify the audience share and audience typology, distribution volume/access, typical content, frequencies (where relevant), approximate popularity, ownership, political affiliation and financing model
- Understand quantitatively levels of internet access nationwide, together with current trends in internet use and in the development of social media, in particular Facebook
- Assess the drivers of trust in political information available on Facebook
- Identify the types of social media users who act as debate-shapers and the types of users who act as an audience
- Identify auxiliary public and private media organisations, including news agencies and production centres
- Identify major developments in the regulatory or legislative environments that could disrupt the media landscape in the shorter and medium term
- Understand the influence of security issues on the development of media outlets and the potential role of the government in supporting the media sector in the future.

1.2 RESEARCH APPROACH

The results presented in this report have been derived from four main research components:

- **Media Landscape Analysis**, which identified and conducted KII with most of the major media outlets, as well as examining the regulatory environment
- **Audience Analysis**, which involved a large national survey to produce extremely robust data regarding media consumption patterns at a national level, and also for five key cities
- **Media Consumption Patterns, Trust and Preferences Analysis** through a broad set of Paired Interviews (PIs) with ‘ordinary Libyans’ in each of the key cities, which helped to explain quantitative findings
- **Social Media Usage Analysis** through a set of case studies that were crossed with data collected through audience surveys, which produced quantitative and qualitative data on social media penetration, usage and trust in Libya.

Each of these components addressed one or more of the main layers of information needed to holistically describe the influence of media in Libya: the media landscape, the audience, and the impact on opinions and behaviours. See Figure 1 below.
1.3 RESEARCH METHODOLOGY

1.3.1 Quantitative Survey

The quantitative survey gathered information on access to media and media consumption behaviours from the Libyan population. This was achieved through a phone survey conducted with over 3,190 randomly-selected people from all 22 districts of the country, in order to produce extremely robust national results.

Sampling Methodology

To guarantee the sample was representative of the actual Libyan population, quotas were set using a Proportional-To-Population (PTP) sampling approach, which made use of the population distribution in each district (shabiyah) using data from the 2006 Libyan Census, and the 2013 population pyramid estimated by the United States Census Bureau.

As planned, the final sample is comprised of respondents from all 22 districts of Libya and specific quotas were defined to include, for each district, equal numbers of male and female respondents from five different age bands, starting at 16 years.

In addition to the national-level survey, there was a purposive over-sampling in five of the most important cities of Libya, namely Tripoli, Benghazi, Misrata, Zuwara, and Sabha. These ‘key cities’ were selected in agreement with the FCO because of their size, political and economic vibrancy and regional diversity.

Final Sample Composition

A total of 3,480 persons were interviewed between March 21st and April 14th 2013. After filtering out non-candid and incomplete interviews, the total sample kept to perform the analysis presented in this report amounted to 3,196 respondents, which exceeded the project target of 3,000 interviews. The final gender ratio was 56% male and 44% female, a slight difference that was balanced out in the post-weighting process. The composition of the final sample is detailed in Table 1 below.
The dataset was post-weighted to approximate the Libyan population in terms of population size, gender and age distribution. The national and key city results are presented with 95% confidence that the results lie within ±2% and ±4.5% of the real situation respectively. For data disaggregated in terms of education level and age, the error margin widens to upwards of 5%. Data for numerically smaller groups, such as uneducated respondents or ethnic minorities, are not statistically representative and are only intended to be indicative of the general trends. Numbers in charts may not add to 100% due to rounding.

**Audience Survey**

As television is clearly the most popular media in Libya, it is of interest to know when Libyans are most likely to watch television during the day, as well as television consumption patterns of women, men, youth or older age groups in order to design more effective information campaigns and communication strategies. Thus, an audience survey component was included in the questionnaire, which consisted of asking the following series of questions: Did you watch anything on television yesterday? At what time did you watch it and for how long? On which TV channel was it? Do you remember the name of the show or the presenter? These questions were repeated as many times as the respondent spent time watching different television programmes the day before the interview. Data gathered were used to understand instantaneous audience shares.

### 1.3.2 Qualitative Research

In order to help interpret the results from the quantitative survey, a series of Key Informants Interviews (KII), Paired Interviews (PIs) and blogger case studies were conducted as part of the research.

The KII consisted in interviewing media professionals and leading outlet managers in order to understand the backgrounds, business models, and main challenges of key television, radio and newspapers outlets.

The PIs had two main objectives:

- To assess appreciation, understanding, satisfaction and trust in media in general,
- To obtain a deeper understanding of regional patterns of media consumption, in particular usage of social networks.

In total, 26 PIs (52 respondents) were organized in five cities: Tripoli, Zuwara, Benghazi, Misrata and Sabha. Two extra PIs with respondents from Kufra were conducted by phone due to security
reasons. In each city, two PIs were organized, split by gender and age group (youth/older). PIs were assembled spontaneously with two people of a similar socio-demographic profile; for example, young women at universities in Benghazi, older men at shisha cafes in Tripoli, and young men at a mosque in Misrata. The interviewees usually knew each other and were encouraged to frankly discuss and debate their opinions within the boundaries of a semi-structured, open-ended guideline. In smaller cities where it was hard to come across potential respondents in public places, respondents were recruited using a snowball approach in the research location. This was particularly the case in Zuwarah and Sabha, and for interviewing Tuareg respondents.

It was felt an additional research component that focused on internet users and bloggers was necessary to delve deeper into the intricacies of social media usage in Libya. These case studies focused on Facebook as a paradigm to assess the particular dynamics of information consumption, usage and dissemination through social media.

Research on social networks and findings from the PIs identified several bloggers who were then interviewed to provide a better understanding of the perspective of on-line activists in their usage of social media. One case-study was conducted with Nader Al Gadi, a Libyan photo-journalist and activist who was described as one of the most insightful members of the ‘Facebook blogger’ community. A second was conducted with a female intensive Facebook user from Tripoli to map out her political usage of Facebook and provide understanding of the functioning of her ‘opinion community’. These case studies are not meant to be representative of the preferences of Libyans regarding specific pages, but help to understand how a community of opinions is typically organized and what the requirements are for such a community to emerge and develop.
1.4 Survey Respondents

Data presented in this report are based on responses from 3,196 Libyans interviewed across 22 districts between March and April 2013, according to the sampling methodology outlined above (see Section 5).

Before presenting any results, it is instructive to review key characteristics of the survey respondents. No quota was set on ethnicity, but Arabs were the most interviewed (89%), followed by Berbers (8%), Arab-Berbers (1%), and Tebu and Tuareg (<1%). Women represented 44% of the sample (although this was post-weighted to 50%). Quotas were set on age, and as such, youth between 16 and 19 represented 9% of the sample, while 27% were aged between 20 and 29 years, 29% between 30 and 39 years, 19% between 40 and 49 years and 16% were more than 50 years.

![Figure 2: Sample age distribution (left) and ethnic distribution (right) (n=3196)](image)

In terms of education, 47% of the population reported they had studied to higher levels of education (college or higher degree-level), 47% to secondary level, and 3% to primary level. Libyans with no education represented 3% of the sample. Of the key cities, Tripoli and Zuwarah populations were the most educated. With the exception of Tripoli, women had more frequently received higher education than men. The city with the lowest education levels was Sabha. Based on this information, the dataset was segmented into four bands representing the segments of the Libyan population who had achieved primary, secondary, and higher education, and an additional band of respondents who had not received any education.
At the national level, the largest employment sector remains the civil service (27% of our sample), a result consistent with Altai’s 2012 media survey. Government jobs appear to be as accessible for men as for women. The second most popular occupation is ‘freelancer, trader and shopkeeper’ (16%). Freelancers (amal hur) are often self-employed men available for different kinds of services without commitment to any particular employer. This type of occupation was particularly popular within the male population of Tripoli (33%), Benghazi (37%) and Misrata (36%). As might be expected, men have access to a much wider variety of occupations and career options than women: in this sample, no Libyan women were working as traders, freelancers, shopkeepers and almost none were employed in the security sector.

Table 3: Respondents’ primary occupation (n=3196)
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HISTORICAL BACKGROUND
LIBYAN MEDIA FROM THE GHADAFI MEDIA TO 2013

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Summary of Key Findings

Areas of Opportunity
2 Historical Background: Libyan Media from the Ghadaffi-era Media to 2013

2.1 Ghadaffi Era Media

In 2009, IREX scored Libyan media at 0.47/4 on their Media Sustainability Index, concluding that Libya’s ‘government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.’ Under the Ghadaffi regime, media outlets were controlled by either the Libyan Jamahiriyah Broadcasting Corporation (LJBC) or the Journalists’ Association. LJBC produced a range of satellite and terrestrial channels from its site in Zawiyat Dehmani in Tripoli, including the flagship Jamahiriyah news and entertainment channel, the Badeel youth channel, and the Hadyyah religious channel. LJBC also produced several radio stations, including local (Jamahiriyah), national (LJBC Radio) and even international radio stations (Sawt Afriqiyah). The Journalists’ Association produced a range of newspapers, including four daily papers (Al Shames, Al Jamahiriyah, Fajr Al Jadeed, and Mal wa Amal, a business paper), The Tripoli Post (a weekly English language paper), and a range of magazines for every taste (Al Bayt, Al Bidaya, Al Watasimoh, Shababiyah, Luluat Al Medina, and Al Amal for children). The Revolutionary Committees Council also produced Zahf Al Akhdar, a daily newspaper.

Until 2007, television, radio and publication outlets were all dictated their informational output by the Jamahiriyah News Agency (JANA), which in turn was tightly controlled by Ghadaffi’s information apparatus. In the early 1990s, the regime resigned to allowing satellite television, which introduced a degree of information plurality, although the regime invested heavily in equipment to monitor satellite content and to jam satellite broadcasts. With just one Internet Service Provider, Libya Telecom and Technology (LTT), internet use was also be carefully monitored.

In 2007, Libya experimented with a slight pluralisation of media, and Saif Ghadaffi was permitted to create the Ghad Media Corporation (GMC). GMC constructed a new studio complex on Nasr Street in Tripoli, and launched a television and radio station Libiya, and two semi-private newspapers, Oya (in Tripoli) and Qureyna (in Benghazi). In the spirit of liberalization, even Al Jazeera was tolerated for a short period. GMC’s outputs were undoubtedly better received than LJBC’s outputs, as it gave an ‘illusion of plurality’. However, the commitment to liberalization was not as strong as some might have hoped. The regime ended the experiment after two years, ostensibly because the new newspapers had not paid their bills, but more likely because they had crossed some red lines in criticizing corruption in the regime. Thus, GMC was nationalized in 2009 and its output was put under the control of the new National Centre for Media Services. Oya and Qureyna were closed down in 2010.

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2 (IREX 2009, 26) For more information on media under the Ghadaffi regime see Internews (2011).
3 Interview with ex-deputy director of JANA, October 2011
4 Visit to satellite television and internet monitoring centre (Al Medina Multimedia Centre), Tripoli, October 2011
5 (IREX 2009, 29)
6 (IREX 2009, 25)
2.2 MEDIA IN 2013

2.2.1 The Ministry of Media

In November 2012, the GNC voted in favour of the creation of a Ministry of Media to regulate Libyan media. This body is meant to replace the ‘Media Ministry’ that was created during the revolutionary period under the leadership of Mahmoud Shamran, as well as the General Media Association (GMA), which was supposed to regulate private media and develop media legislation under the National Transitional Council (NTC). While the first Media Minister has already been appointed (Youssef Al Shareef), the Ministry of Media does not have a dedicated building yet, and is temporarily located in the Ministry of Culture. No information about its budget has been communicated thus far.

While the General National Congress (GNC) announced that media sector reform was one of the government’s priorities for 2013, it has also publically acknowledged that the current ‘confusion in the media discourse’ and the resulting lack of communication between the citizens and the government were due to a triple absence: the ‘absence of competent media authorities’, the ‘absence of regulations to organize media discourse’, and the ‘absence of efficient and professional media offices in ministries’.

The GNC’s vision for media reform is summarized in the Executive Plan for 2013, which aims to:

i. ‘Reform governmental media institutions in order to promote the credibility of the media discourse and performance […]’

ii. ‘Spread correct Islamic knowledge and establish the principles of tolerance, moderation and encourage memorizing the Quran […]’

Most private and public outlets interviewed across the country expressed their willingness and impatience to cooperate with the Ministry of Media. Yet, many complained that the Ministry of Media was not living up to its mission of reorganizing and supporting Libyan media. However, financial and security issues related to the two main government-owned television channels Al Wataniyah and Qanat Libya Al Rasmiyah have severely limited the capacity of the Ministry of Media to effectively fulfil its role. Indeed, no budget has yet been granted to the Ministry of Media, and the television channels have on occasion been taken over by revolutionary fighters since April 2013, leading to strikes by employees.8

The diagram below provides an overview of the various state media outlets currently operating in the five cities this study focused on. It is expected that the current picture may change in the next few months, particularly for outlets such as Sawt Libya Al Hurra in Benghazi and for Kasas FM in Zuwarah, which currently use government facilities and antennas to transmit but have control over their programming grids and editorial lines. Their situations might change in the near future as managers from both outlets expressed their desire to receive help from the new Ministry of Media. Moreover, the status of the two Tripoli-based television channels LRT Sport and Qanat Libya Al Rasmiyah remains uncertain, as these channels only offer a very limited number of programs.9 Also noticeable is the contrast between Tripoli and Benghazi on the one hand and Misrata, Zuwarah and Sabha on the other, with the former cities featuring more outlets partnering with the government, while the latter cities seem to have less interaction with the government.

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8 Interview with Ministry of Media official, April 2013

9 Interview with Ministry of Culture official, April 2013
Figure 5: Overview of the state outlets, local council outlets and state-supported media outlets currently operating in Libya’s five major cities

2.2.2 The GNC Media Office

The GNC has its own media department located next to the Congress for official press releases, communication between the GNC and Libyan citizens and public information campaigns. However, according to department officials interviewed, the GNC Media Office needs external assistance to reorganize its management, human resources, and internal communication processes. A GNC Media Office official explained that the media office would be unable to improve communication between the Libyan people and the government as long as it ‘remains unable to communicate internally in an effective manner’. He also mentioned that the various Public Relations Officers of each Member of Congress systematically fail to report to the GNC Media Office itself, making collaboration especially challenging.10

2.2.3 Media Regulation

So far, the only regulation promulgated by the GNC was created by the Ministry of Telecommunication to rule on the attribution and usage of radio frequencies. Regulations have been instated in December 2012 and are already enforced for radio stations, but do not yet apply for television channels.11 Currently, any entity interested in creating a radio outlet should send an application form to the relevant local council for approval. Once the form has been approved, the

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10 Interview with GNC Media Office official, April 2013
11 The Ministry of Telecommunication has created a webpage to provide information on fees and payment modalities for given frequencies, as well as a downloadable application form.
request is transferred to the ‘High Spectrum Committee’, a special committee based in the Ministry of Telecommunication that oversees radio frequencies distribution across the country.

### 2.2.4 Support and Challenges

#### Training Programmes

A number of media support programmes have been implemented by actors as varied as International Media Support (IMS), Internews, International War and Peace Reporting (IWPR), the Office of Transition Initiatives (OTI), Deutsche Welle Academy, Canal France International (CFI), BBC Media Action and Al Jazeera’s Doha Training Centre. Training programmes vary in scope and duration, with some of them focusing on television production (IWPR, BBC Media Action), and other focusing on developing blogging in Libya (RFI, France 24), radio support (Deutsche Welle Academy, CFI) or newspapers support (IWPR).

The national broadcaster Al Wataniyah received training from the BBC Media Action in 2012. Interviews at Al Wataniyah showed that the training of the BBC was perceived as successful. Journalists and scriptwriters who were trained by the BBC affirmed they gained good command of interview techniques and better know-how about how to produce formal press releases.\(^\text{12}\)

In Tripoli, the Free Media Centre (FMC) is involved with all types of media and cooperates with BBC, Al Jazeera, Internews, Doha Training Centre, USAID, etc. The FMC offers training courses in lighting, photo shooting, and provides interview skills to people who already have certificates. Their largest project took place before the 2012 elections and was entitled ‘how to cover the election’, with a series of 10 workshops on the topic.\(^\text{13}\) The Libyan Media Institute was created in April 2013 and received funding from IMS to provide journalistic certificates and courses in in Tripoli and Benghazi. They have created a five-year programme to provide certificates and plan to work in close partnership with the Media Department of Tripoli University in order to create a ‘media lab’ for its students.\(^\text{14}\)

Several Libyan media professionals interviewed have sometimes asserted that a limited number of younger outlets with perceivably ‘Western’ programmes would attract more support from the international community while traditional media would often be left aside. Others expressed concerns that their outlets would be associated with ‘foreign agendas’ and lose part of their freedom of expression if they participated in training programmes organised by foreign organizations. One media professional noted that, ‘with every funding comes an agenda’.

Overall, media outlet managers underscored an urgent need for technical training. Radio outlet managers interviewed in Benghazi explained that international organizations would typically offer ‘journalistic training’ but would rarely offer training programmes in other important technical skills such as sound editing, sound design and marketing. Foreign staff (often Tunisians, Lebanese and Jordanians) are employed to address this skills gap.

Interviews with trainers highlighted the difficulty to condense series of courses that usually required two years of training in just a couple of months. Trainers also explained that delivering certifications upon the submission of a ‘media work’ such as a video clip or an article was one of the best ways to guarantee assiduity and motivation in training. This tallies with interviews of journalists who mentioned the delivery of a certificate as one of their main criteria to assess the value of the training.

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12 Interview with Al Wataniyah Officials, April 2013

13 Interview with FMC official, April 2013

14 Courses are free of charge for the next five years.
Yes, I see a clear difference before and after the BBC training. I can see that the ones who attended the training are more cooperative, they are trying to help each other rather than compete.

Raafat, 27 Presenter at Libya Al Wataniyah, Tripoli

To survive financially is the hardest challenge. Where there is money, there is influence. So the challenge is to find money without influence.

Ayoob, 25, media manager, Zuwarah

Security Challenges
A majority of outlets interviewed mentioned security as their first concern and as the major challenge they face on a daily basis. Television channels, radio stations as well as newspaper staff operate in a very insecure climate and often resort to self-censorship practices to avoid threats. These threats vary in form and scope. From February to April 2013, most media outlets interviewed reported having experienced psychological pressure (mainly anonymous phone calls and threats on Facebook) and sometimes even physical violence (e.g. kidnapping, destruction of equipment or blocking access to the media facility). These types of threats affected public and private outlets regardless of the location, showing that intimidation tactics are neither confined to a particular city nor a certain type of outlet, but affect the work of the majority of Libyan media professionals.

As an example, staff at Radio Shabab Libya in Benghazi reported being threatened by phone calls after they criticised some militia groups that were perceived to be taking too great a role in the city compared to the police. In Tripoli, the government channels Al Wataniyah and Al Rasmiyah were frequently blocked by militia groups and former revolutionaries during the research period. An employee explained that ‘the people who protect the building interfere with the channel in every detail’. The private channel Al Aseemah had five staff kidnapped in March 2013, including the channel manager, while the Benghazi-based channel Libya Al Hurra was attacked for having spread misleading news about Bani Walid in October 2012, leading protestors to destroy equipment and violate the channel’s security.  

17  http://www.libyaherald.com/2012/10/23/demonstrators-condemn-attack-on-libya-al-hurra/
ACCESS TO MEDIA,
FREQUENCY OF USE AND MAIN SOURCES OF INFORMATION

Research Scope and Methodology

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3 ACCESS TO MEDIA, FREQUENCY OF USE AND MAIN SOURCES OF INFORMATION

The analysis of access to media and main sources of information shows the widespread use of satellite television and the higher than expected penetration of internet. It further highlights a growing preference for Libyan television channels as opposed to international ones, most probably due to the progressive stabilisation of the television landscape in Libya combined with the absence of any significant coverage of Libya in international television channels since the revolution.

3.1 ACCESS TO MEDIA

Access to satellite television is remarkably high all over Libya (99%). Radio comes second (58%) and internet third, with a fairly high overall penetration (40%), although regional disparities are observed across the sample, most strikingly between Tripoli (53%) and Misrata (34%). Moreover, 31% of people surveyed say they have access to terrestrial TV in their house (even though later analysis shows that this medium is barely watched). Finally, newspapers score the lowest, with only 11% having access to up-to-date newspapers across the country.

![Figure 7: Access to media by city (n=3196)](image)

When taking a closer look at the 1% of the Libyan population without access to satellite television, it appears that the main reasons not to have a satellite television are split between having no interest in its content, considering it to have a bad influence, or considering it to be too expensive.

47% of those who have access to internet use Wimax devices, while 24% declared having access to the internet via ADSL, 17% via mobile phones, 4% via dial-up and 4% via VSAT. Libyans living in rural and urban areas have nearly the same access to all types of media with the exception of the internet, which shows a larger disparity in access between rural (32%) and urban populations (42%). Rural populations are more likely to connect to the internet via mobile phones (22%) than city dwellers (15%), while rural populations connect less through ADSL (16%) than urban ones (27%). However, Wimax remains the primary way of connecting to the internet for both populations, with the exceptions of Murzuq and Ghat, where no-one reported connecting through Wimax.

At the time of writing, Libyan Telecom and Telecommunications (LTT) had stopped issuing new Wimax devices, and PI respondents complained that they were obliged to buy their Wimax devices on the black market for a higher price. These concerns are notably voiced in the popular
Facebook page ‘I hate Libya Telecom and Telecommunication’ created in May 2010 and followed by more than 19,000 people.

Figure 8: Means of accessing the internet (n=1261)

I don’t have internet because LTT is closed, there are no Wimax units anymore. We have to buy it on the black market, and it is becoming too expensive.

Abd Al Khaled, employee, 35 Tripoli

The results show that all types of media are equally accessible to men and women. Field observations indicate this is because most Libyans consume media within a family setting, so that access to different types of media strongly depends on household rather than individual preferences. The strongest differences in media consumption were found comparing levels of education and access to media. This is particularly striking when looking at internet and newspaper access.

Figure 9: Access to media, by respondents’ highest level of education (n=3196)

These trends are confirmed when comparing media penetration rates to respondents’ main occupations. Access to internet is exceptionally low for taxi drivers (2%) and daily workers (11%). Housewives, retired people and members of the security forces also scored rather low on this metric, with only 23% having access to internet, compared to the national average of 40%. Libyan students are the most connected (60%). Access to newspapers is also remarkably low for daily workers (3%) and taxi drivers (0%).
3.2 Frequency of Use

Access to media and frequency of use tend to mirror each other despite some significant variations across types of media, locations and socio-demographic groups. As shown below, access to television (99%) and frequency of usage (76% watching daily) are very high, showing a strong association between access to television and actual consumption on a daily basis. Radio is the second most accessible media (58%) although it remains under-consumed relative to its access as only 37% listen to it daily. Overall, internet is nearly as accessible as radio (40%) and 24% report connecting daily. Newspapers remain poorly read on a daily basis (6%), while 11% declare having access to up-to-date newspapers at home.

A comparison of data from 2012 to 2013 from the two most reliable datasets (Tripoli and Benghazi) shows a slight overall decrease in media consumption. This is likely due to the relative
stabilisation of the security and political situation in the country, meaning Libyans do not need to consume media on a daily basis in order to keep up with the country’s evolution.

While television consumption is fairly equitable across locations and socio-demographic groups, radio usage is on average much more frequently consumed by men (47% daily usage) than by women (25%), and by 30 to 50 year old respondents (39% average daily usage) than by other age bands (27%).

![Figure 12: Frequency of radio consumption, by gender (left) and age (right) (n=3196)](image)

Variations between locations and socio-demographic groups are the highest for internet usage, with respondents from Tripoli, youth and educated people using internet more often than the national average. Indeed, the difference is particularly striking between the capital and the rest of the country as 37% of Tripolitanians report daily usage of internet against 24% nationwide. Internet may also appear as a more elitist media as it is almost only used by respondents with secondary or tertiary education and by very few of the respondents with lower education levels. Finally, internet usage is negatively associated with age, as just 12% of interviewees over 50 years reported daily usage compared with 37% for teenage (16-19 years old) respondents.

![Figure 13: Frequency of internet consumption, by city (n=3196)](image)
Some variations are also observed in newspaper usage across locations, as around 7% of the Tripoli and Benghazi populations report reading newspapers on a daily basis, rather than in other locations such as Misrata or Sabha, where daily usage barely registers. These results are certainly due to the fact the two leading publications are produced in Tripoli (Febaryr) and Benghazi (Qureyna Al Jاديد). In 2013, those who consume newspapers on a daily or weekly basis are mostly middle aged city dwellers living in Tripoli and Benghazi. Clearly, proximity to big cities plays a key role in explaining newspapers consumption, as 71% of daily newspapers readers are city dwellers, against 23% living in the countryside and 7% in suburbs. Despite small sample sizes, the absence of any daily newspaper readers in Marj, Darnah, Murzuq, Idri, Hun and Ghat is indicative of a strong link between frequency of readership and residence in main cities.

**Figure 14: Frequency of internet consumption, by education levels (left) and age groups (right) (n=3196)**

**Figure 15: Frequency of newspaper consumption, by location (n=3196)**

### 3.3 Main Sources of Information

The dominant media in Libya remains television, as 74% of Libyans report using television as their primary source of information. 38% consider Libyan television as their main source of information, compared with only 20% one year ago. This trend is mirrored in the drop in international television consumption, as only 36% of Libyans chose international television as their main source of information compared with 60% one year ago. Qualitative research suggests this is most probably due to the progressive development of the television landscape in Libya combined with the absence of significant coverage of Libya by international television channels since the revolution. Two years after the revolution, Libyans are looking for more analysis of the country’s
reconstruction, state-building efforts and a re-definition of their cultural identity, and are therefore turning to Libyan television.

International websites remain an important source of information for 10% of Libyans, rather more than 3% who rely on Libyan websites. Although 58% have access to a radio, 37% consume it on a daily basis, just 3% consume it as a primary source of information. This shows that radio is hardly seen as an information-sharing medium in Libya, but rather as a source of entertainment.

Younger respondents tend to use more diversified sources of information. Libyan teenagers (16-19 years old) are most likely to get informed first through international television (37%) then through Libyan television (28%). PIs confirmed these results and showed that in the respondents’ families, the younger brothers or sisters would systematically turn on international television to get informed. This preference for television as a source of information should not undermine the importance of other sources for young Libyans, such as international websites (13%) or less commonly, Libyan websites (2%).

Young Libyan adults (20 to 39 years) are consuming more Libyan television than international television. PIs showed adults in their late thirties appreciated the efforts made by Libyan channels to professionalise and air more diverse programmes compared with one year ago. Libyans aged over 50 years tend to rely very heavily on television to access news (84%), with a slight preference for Libyan television channels.

I spend 70% of my time on TV watching Libyan television channels because they talk about my direct environment and my problems. There is no news about Libya on the BBC or Al Jazeera...

Abdullah, 35, car importer, Misrata

There’s been a radical change in Libyan television: analysis and reports are of better quality. And it matches the needs of the people, before we were witnesses of the revolution, now we are looking for deeper analysis to understand what is happening.

Hanesh, 60, university teacher, Tripoli
Table 5: Main sources of information, by age group (n=3132)
TELEVISION
LANDSCAPE AND CONSUMPTION PATTERNS

Research Scope and Methodology

Historical Background: Libyan Media from the Ghaddafi-era Media to 2013
Access to Media, Frequency of Use and Main Sources of Information

Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns
Social Media Landscape and Consumption Patterns
Print Media Landscape and Consumption Patterns
Trust and Distrust Regarding Political Information
Government Role in the Media
Summary of Key Findings
Areas of Opportunity
4 TELEVISION LANDSCAPE AND CONSUMPTION PATTERNS

4.1 TELEVISION LANDSCAPE

Since 2012, Libyan channels have gained the trust of the population and have become the primary source of information for the population, notably by providing the local and national news Libyans strongly desire. Of the television channels created in the aftermath of the revolution, a handful have emerged as being sustainable in the long run, both in terms of capacity and audience. Private television channels are still interested in the Libyan market, and at the time of writing, a few new channels (Dawliyah TV, Ajial TV, Radiozone TV and Al Nabaa TV) have launched operations or are planning to do so in summer 2013. The most popular national and regional Libyan television channels as of April 2013 are presented below.

4.1.1 Main National Television Channels

Libyans have access to government news and political updates through Al Wataniyah, the most important public channel. Libyan television consumers also have access to a number of private television channels, among which are the youth-oriented Al Aseemah and the influential Al Ahrar. These channels usually offer a similar package of programmes comprised of social chat shows, political dialogues, cultural documentaries, religious shows and news bulletins.

Al Wataniyah (‘The National’) is the main state broadcaster in Libya since January 2012. It replaces Jamahiriyah television (and the NTC’s LRT) and broadcasts from studios in Zawiyat Dehmani in Tripoli. Al Wataniyah broadcasts on satellite nationally and in Tripoli terrestrially. In terms of content, Al Wataniyah offers a mix of news bulletins, documentaries, live GNC sessions and discussion shows.

Qanat Libya Al Rasmiyah (‘Libya Official’) is a public television which started broadcasting from the old Qanat Libiya studios on Nasr Street in December 2011. Al Rasmiyah has no live content and offers only pre-recorded shows due to managerial difficulties and security problems as of the time of writing. In addition to social programs dealing with health and education issues, the channel offers political shows discussing issues such as the much debated isolation law by interviewing Ministers and government officials.

Al Aseemah (‘The Capital’) is a private channel that started broadcasting in July 2011 from Tunis. Al Aseemah now broadcasts 24/7 from Tripoli, with about 8 hours of live shows and 16 hours of pre-recorded content and re-runs. Al Aseemah has a dynamic image and branding, and is often referred to as the ‘liberal channel’ in the current media landscape. It broadcasts cultural, political and entertainment programmes, with a strong focus on news and politics.
<table>
<thead>
<tr>
<th><strong>Libya Al Ahrar</strong> ('Libya for the Free') is a private channel that started broadcasting from Doha on March 30th 2011. <em>Libya Al Ahrar</em> was created by Mahmoud Shammam, the ex-Media Minister, and is considered as one of the most influential television channels since its creation. It broadcasts mainly news, debate and political programmes in Arabic although one program and one news bulletin are provided in Berber language by Sana Al Mansoori. <em>Al Ahrar</em> plans to create another channel for live shows only called <em>Ahrar Mubasher</em> ('Ahrar Live').</th>
</tr>
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<tbody>
<tr>
<td><strong>Libya Al Hurra</strong> ('The Free Libya') is a private television channel started in February 2011 by the Libyan journalist Mohammed Nabbus. It broadcasts a variety of interactive social shows, dialogue-based political programmes, as well as religious and sport shows from its studio in Benghazi. <em>Al Hurra</em> has reporters in nine Libyan cities including Benghazi, Misrata, Tubruk, Derna and Zintan as well as a reporter in Gaza. Respondents in PIs often associated this channel with Benghazi and the Muslim Brotherhood.</td>
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<tr>
<td><strong>Libya Awalan</strong> ('Libya First') is a private television channel founded in Cairo in March 2011, broadcasting a mix of political dialogue programmes, chat shows and entertainment including <em>Sahwat Watan</em>, one of the most popular television shows in Libya. PIs showed that young Libyans particularly appreciated that the Facebook page of the channel, which becomes interactive during certain shows.</td>
</tr>
<tr>
<td><strong>Libya TV</strong> is a private television channel owned by a prominent Libyan businessman, which launched in May 2011 in Egypt. In terms of content, Libya TV offer a number of political dialogue programmes, with famous guests such as GNC members. Their Facebook page also becomes interactive during their most popular show <em>Lammet Khot</em>, which displays a space to take people's opinions on Facebook during the show.</td>
</tr>
<tr>
<td><strong>Libya One</strong> is a private Libyan television channel launched in September 2011. Broadcasting from Tripoli, and managed by Ali Gadam, it offers a few socio-political programs such as ‘Libyan Street’, a political show presented by Anwar Bellazi, popular amongst middle aged Libyans.</td>
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4.1.2 Main Regional Television Channels

Regional television channels are most often managed and funded by their local councils. Misrata TV proves to be the most popular in its stronghold of Misrata, but audience in other locations is still limited despite the national ambitions of the channel. Unusual in this landscape is the existence of a private regional channel in Sabha, Fezzan TV, dedicated to promoting the traditions of Southern Libya.

In Benghazi, the local television sector seems more developed with the existence of two public channels, Benghazi Broadcasting Network (BBN) and Benghazi Television (BTV), as well as the prominence of the privately owned Libya Al Hurra, often referred to as the most pro-Benghazi channel in the PIs conducted in this region as well as in Tripoli. According to a Benghazi council member interviewed, existing Libyan television channels are often locally criticised for being unable to properly cover what happens in the eastern area and for being mainly concerned with ‘politics in Tripoli’. The council member asserted that information about Benghazi is usually of poor quality, and that misleading rumours on events of the region are frequently relayed by the national media.

**Misrata TV** is a public television channel created in August 2011 in Misrata. Mainly funded by the local council of Misrata, the channel uses the studio facilities of the old LJBC Misrata television centre, and broadcasts via satellite across Libya. In terms of content, Misrata TV has two live political programmes, two religious shows and one ‘social clinic’ programme. Although popular only in Misrata, the channel has the ambitions of a national channel and targets Libya as a whole.

**Tobactes TV** is a private television created in July 2011 in Tunisia a funded by a businessman from Misrata, Mohammed Al Ghwil, who also manages the Tobactes Radio Network. The television moved to Misrata and is reported to have studios in Tripoli as of May 2013. Its editor in chief is Omar Abu Ghadada. The channel has only pre-recorded content.

**BBN TV (Benghazi Broadcasting Network)** is a public television channel and radio station created in December 2011 by the pre-May 2012 Benghazi Local Council. Currently located in a youth hostel in Benghazi, the television is not broadcasting yet. It intends to have cultural and entertainment shows about Benghazi. According to interviews conducted with the channel manager, BBN relies a lot on volunteers and suffers from lack of financial support.

**BTV (Benghazi TV)** is newly-created public television channel supported by the Benghazi Local Council that was elected in May 2012. The channel is renovating a mall to create its studios as well as its own radio station. BTV was created as a result of the lack of coverage of the city of Benghazi in mainstream Libyan television. As such, Benghazi TV intends to provide reliable news and cultural shows about Benghazi (80%) and the rest of Libya and the world (20%).
**Fezzan TV** is a private television channel created after the liberation of Sabha by a Libyan businessman. Fezzan TV is mainly concerned with promoting Libya’s southern culture, and broadcasts two hours of live content daily and 12 hours of recorded content. One of their most popular programme is ‘Say Your Opinion’, a 45 minute weekly discussion about problems of the South. The channel has plans to train its team and start a news program.

### 4.2 Production Facilities

Since 2012, new studios have been built by both public and private television channels across the country, with Tripoli, Benghazi and Misrata being so far the most important poles of media production.

Some existing private television channels are expanding by creating local branches in other main cities. For instance, the Benghazi-based *Libya Al Hurra* recently opened a branch in Tripoli and the Tripoli-based *Al Aseemah TV* is currently opening new studios in Benghazi.

In Tripoli, the public television production facilities are still located between sites in Zawiyat Dehmani (*Al Wataniyah*), Nasr Street (*Al Rasmiyah*), and Gargaresh (*Libya Al Riyadiyah*, the Libyan Sport channel not broadcasting original content as of writing). New facilities have been created by private Libyan television channels and are still under construction, including the studios on Tripoli airport road for a new channel *Al Dawliya TV*, and the studios of *Al Nabaa TV*, a new television channel with ambitions to build world-class production facilities in Tripoli by summer 2013.

*Figure 17: Control room of Libya Al Wataniyah (left), control room of Al Dawliya (centre) and Al Aseemah (right)*

In Benghazi, the local council is currently funding two public television channels. BBN is acquiring new studios on the airport road, while BTV, the newly created television channel of the local council, is moving in its new headquarters in a refurbished mall in Benghazi.

In Misrata, the trend has evolved since 2012, as Misrata TV, which uses the former LJBC studio, seems more cooperative towards the government than in the aftermath of the revolution. Indeed, whereas Misrata TV was mainly supported by businessmen in 2012, the station is now mainly funded by the local council and is working in partnership with *Libya Al Wataniyah*, e.g., by sending news videos from Misrata in exchange for GNC-related news. Yet, a lot of problems are reported with funding, as the local council is only financing salaries, and has put a limitation on the number of staff the channel can employ (62).

Finally, private channels located outside of Libya are improving the quality of their studios and their outreach to target broader audiences. As such, since 2012 *Libya Al Ahrar* has invested in large studios in Benghazi (see picture below) showing that the television channel does not only broadcast from Qatar. *Al Ahrar* also plans to create a new channel for live shows only, called *Ahrar Mubasher* (*Ahrar Live*) in order to broadcast all the events that take place in Libya live. Meanwhile,
its main rival Libya Al Hurra has plans to develop a full package of channels, including sports and entertainment channels and might further develop its studios to accommodate its new needs.

Figure 18: Studios of Al Ahrar in Benghazi (left), studios under construction of Benghazi TV in Benghazi (centre), studios of Misrata TV’s religious talk show in Misrata (right)

4.3 CHANNEL PREFERENCES AND AUDIENCES

4.3.1 General Television Preferences

As seen above, Libyans tend to source information mainly through Libyan television channels. This reliance on Libyan television channels is confirmed as respondents were asked about how much time they spend watching international television compared to Libyan television channels. 35% responded that they watched mainly Libyan channels, against 19% for international channels.

Clear profiles with different television consumption patterns emerge. The strongest associations are found between television consumption, education and age. Consumption of international television increases with the respondents’ level of education, and decreases with age.

Fieldwork confirmed these trends, as PIs conducted in the main Libyan cities showed that young Libyans, and particularly college students, are more likely to turn to international television to get informed or verify the accuracy of news.

Figure 19: Preferences for watching international or Libyan television, by education level and age group (n=3132)

Interestingly, Libyans from different ethnic groups appear to consume different types of television. Although sample sizes of non-Arabs are small, the results indicate that the Tebu rely upon international television (68%), where Arabs, Berbers and Tuaregs tend to consume a more balanced mix of international and national television. Young Tebu men interviewed in a PI in Sabha asserted that the Tebu community does not recognise itself in Libyan television, as their problems and political claims are rarely voiced. They suggested that Libyan television channels would
sometimes accuse Tebu of being responsible for the recurrent clashes taking place in Sabha and Kufrah since 2012, thus creating fitna (‘division’) within the Libyan society. As a result, the Tebu are the most likely to turn on international television and avoid Libyan channels.

**Figure 20: Preferences for watching international and Libyan television, by ethnicity (n=3132)**

### 4.3.2 International Television Channels

Al Jazeera Arabic appears as the preferred international channel with 60% of Libyans mentioning it among their three preferred channels. PIs showed that Al Jazeera was often referred to as the best channel for ‘fast news’ among respondents from all ages and all locations. Al Jazeera presenter Khadija Ben Guenna was mentioned in many PIs as the most popular international media personality.

The MBC group entertainment channels ranked second across socio-demographic groups (42%). As shown in the figure below, these channels are on average the most preferred among teenage Libyans (59%), but much less among older Libyans. MBC group is followed by Al Arabiyah with 42%, and then much less popular are BBC Arabic and France 24 Arabic, with around 15% stated preferences each.

**Figure 21: International television channels preferences, by age (% of respondents expressing preference among three responses, n=2755)**

*I watch Al Arabiya and MBC. Al Arabiya for neutrality and MBC for variety. MBC group have good quality of programme they have a goal for each channel: MBC 1 for news, MBC 2 for*
Significant variations are found between men and women across the key cities. Women showed a particular appetite for MBC channels, due to their great variety of programmes and in particular, their popular Turkish soap operas. Libyans with a higher education have a greater appreciation for France 24 and BBC Arabic than less educated Libyans. PIs showed that male and female teachers in their thirties in Tripoli turn on France 24 because they ‘always find what they are looking for’ and appreciate the high level of professionalism of BBC Arabic in general. See Figure 22 below.

**Figure 22: International channels preferences by gender and locations (% of respondents expressing preference among three responses, n=2755)**

*I like BBC Arabic, they even talk about the Jewish people who came back to Libya after the Revolution, no-one else does that!*  
Fatima, 43, University lecturer, Tripoli

*Al Jazeera is the fastest to spread the news. I watch it for the presenter Khadija Ben Guenna, I love her.*  
Hilal, 20, student, Benghazi

**4.3.3 Libyan Television Consumption Patterns**

The audience analysis show that the peak time for television audience is between 20:30 and 21:30, where around 15% of the nation are watching television.

Disaggregating by gender, it is interesting to note the presence of three peak times for male, female and family audiences. While male television audience peaks at 22:00, female television consumption is at its highest between 16:30 and 18:00. This time slot appears as the best to target Libyan women, as it is the main time of the day where they are watching television alone. This is likely because women are generally not allowed to stay outside the house after sunset, while men are more likely to head out for coffee. The best time slot to reach Libyan families is between 19:30 and 21:00, which coincides with dinner and the gathering of the family as a whole.
When disaggregated by age group, the audience analysis shows that people aged over 50 are more likely to watch television in the afternoon, while teenage Libyans have their viewing peak around 19:30. This might be due to the school commitments of this age group, as high school students might be busy with homework and forbidden to watch television with their parents after a certain time of the day. Libyans in their thirties are slightly more likely to be in front of the screen between 16:00 and 19:00. There is generally no strong variation in audience across different Libyan cities.

**Figure 23: Instantaneous observed audience share, by time of the day (above), disaggregated by gender (below) (n=3132)**

**Figure 24: Instantaneous observed audience share, by time of the day disaggregated by age groups (n=3132)**
4.3.4 Libyan Television Channels: Stated Preferences and Observed Audience

**Stated Preferences**

For the Libyan channel preferences, the landscape is dominated by the state channel *Al Wataniyah* (56% stated preferences). Fieldwork showed that in all Libyan cities visited, *Al Wataniyah* ranked especially high in terms of quality of content, speed of news and trustworthiness. The second place is claimed by a trio of Libyan television channels: *Al Aseemah* TV (41%), *Al Ahrar* (39%) and *Al Hurra* (38%). The fact these three channels are so close to each other in terms of audience ranking reflects the on-going competition between these three private channels.

*Al Aseemah, Al Ahrar and Al Hurra* are the three most popular and sustainable private Libyan channels. Key informant interviews with the managers of these television channels showed their willingness to diversify their programmes and adapt some of their content regionally in order to reach new audiences. With variations across the country, these channels compete with a range of smaller channels such as *Libya Awalan* (22%), *Libya TV, Misrata TV* or *Libya One*. In this regard, Misrata respondents very much rely on Misrata TV as a first source of news, where Benghazi populations rely on *Al Hurra*, a channel commonly associated by PI respondents with the city of Benghazi and pro-federalist ideas.

![Figure 25: Libyan television channels preferences, by city (n=2916)](image_url)

Rankings of different Libyan television channels have evolved over the last year. The first major change is the growing share of the government television channel *Al Wataniyah* with 56% stated preference nationally against only 7% in 2012. This may be due to the broad acceptance of the government channel, (which had barely started operating at the time of the 2012 survey), as well as to its professionalisation. In 2012, *Al Wataniyah* received a series of trainings provided by BBC Media Action to improve the news reporting and video skills of the staff, which were felt to be successful according to the presenters at *Al Wataniyah*. Pls demonstrated that *Al Wataniyah* scored particularly high when it comes to trust, as respondents from all types of background tended to say they would trust the government channel ‘70%.

The second key trend is the increased share of *Al Aseemah* TV with 41% stated preferences against only 7% one year ago. This notable rise can be explained by a combination of factors including development of better studios, investment in staff through trainings from Internews and IWPR, and increased attention to regional audiences with the creation of a Benghazi office. Finally, *Al Ahrar* and *Al Hurra*, the two emblematic private channels created in the aftermath of the revolution, remain in strong positions from 2012 to 2013 indicating they are now one of the most stable components of the volatile Libyan media landscape, and are likely to stay so in the months to come.
The table below summarises expressed preferences by gender and age groups for the main television outlets identified in this study, with highest viewership level within each segment of the population shown in red and the lowest in blue. Beyond small variations between demographic groups, the table highlights the consistency of preference, and also the emergence of the five major outlets.

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<td>Al Wataniyah</td>
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<td>Libya Al Ahrar</td>
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<td>Al Aseemah</td>
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<td>Libya One</td>
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<td>Tobactes</td>
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<td>8%</td>
<td>3%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
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<td>8%</td>
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<tr>
<td>Qanat Libya</td>
<td>5%</td>
<td>12%</td>
<td>7%</td>
<td>2%</td>
<td>5%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>BBN</td>
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<td>1%</td>
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<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
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</tbody>
</table>

**Figure 26: Channels viewership intensity by age and gender sub-categories (% of respondents expressing preference, three responses)**

Summarising variations in preferences across television channels over time, the following table highlights *Al Wataniyah*’s appearance at the top of the chart and its significant increase in popularity since 2012 (52% increase in respondents mentioning it among their top three channels). *Al Aseemah* is the second most improving outlet as it passes from the sixth position to the second (25% increase) equal with *Al Ahrar*. *Libya Awalan* registers the greatest fall in popularity (22% decrease).

**Figure 27: Top television channels in 2012 and 2013 (% of respondents expressing preference, three responses)**

*I prefer *Al Wataniyah* for the speed of news and its capacity to discuss all problems. I trust it 100%.*

Ibrahim, 38, freelancer, Tripoli

**Observed Audience**

Television channel preferences are especially interesting when compared to actual channel audiences, as ideas of preferences and viewership behaviours sometimes differ significantly. For example, Libyans might say they prefer a given television channel, while they actually spend their time watching another one.
In terms of audience, MBC ranks first with 3% of national audience share at 8pm, followed by a myriad of other channels. It is worth noting that a large share of respondents did not remember the name of the television channel or program they watched the day before (recorded as ‘other’ in the chart below), which indicates that Libyan television audiences are scattered across a wide variety of emerging Libyan channels and international television stations accessible through satellite. MBC Group dominates the media landscape for most of the day, starting at 17:00 with a peak at 20:00. This is followed by Al Wataniyah with a peak in the middle of the afternoon from 15:00 to 18:00 as well as later in the evening at 8pm when it is watched by 1.5% of the population. Also notable is the 21:00 peak of Al Jazeera Sport, which coincides with male audience peak time, as shown in Figure 23 above. Al Aseemah seems to be particularly watched between 6:00 and 7:00 in the morning, although its biggest share remains at 8pm when the channel is watched by 1.5% of the population. Libya Awalan reaches its highest viewership at 22:00 in the evening, corresponding to the time slot of Sahwat Watan, a socio-political chat show hosted by Khaleefa Abeedy and often cited as Libyans’ favourite television show (see preference sub-section below).

The chart above suggests that Al Wataniyah, although well ranked in Libyan channels, is not quite as consumed as people like to say, showing that expressed popularity is not a linear relationship with audience share.

Figure 28: % of Libyan population watching each channel over a typical day (n=3132)

Figure 29: Cumulative audience over a typical day (n=3132)
4.4 Programme Preferences and Audiences

4.4.1 Type of Programs

Respondents were asked what programmes they would like to see more of on Libyan television. Data are presented both as the first choice, and then as an aggregation of three prioritised choices.

Local news is the most desired type of programming on television, selected as a first choice by 24% of the Libyan population. This is followed by international news (14%) and sports programmes (9%). This indicates that the population strongly desires that Libyan television channels provide more local and international news.

However, differences exist between cities. Male respondents in Benghazi have a stronger appetite for political debates than anywhere else in the country. Also notable is that cities with the most diversified tribal makeup desire more local news. This is striking in the case of Zuwarah and Sabha, and might be the result of Amazigh ethnic minorities feeling isolated from the political processes in Tripoli. For instance, 53% of Zuwarah’s male respondents demand local news on Libyan television, which is likely the result of the Amazigh community feeling their local news lacks coverage by the main television channels.

On an aggregated basis, international news is the second most demanded type of program, by 26% of the Libyan population, followed by cultural documentaries (21%). Disaggregating by gender, women appear notably more interested in drama and soap operas, with a strong desire for movies. Women are also more interested in religious shows than men. This appetite for both soap operas and religious shows might appear contradictory, yet women in PIs expressed a keen interest in gaining advice on how to improve their day-to-day lives through religious teachings. Men and women are equally eager to see political debate on television, and men appear more interested in international news on television than women.

Figure 30: Preferred types of television programmes (Respondents’ first, second and third choices, n=3132)
Examining the data by education level, it is clear that less educated Libyans desire more religious programmes on Libyan television, whereas, more educated Libyans prefer a wider variety of programmes such as news, cultural documentaries, and drama.

**Figure 32: Preferred television programmes according to education** (% of respondents expressing preference, three responses, n=3132)

4.4.2 Specific Programs

Respondents were asked to name their favourite programmes and presenters as part of the general survey, as well as the ones they watched on television the day before as part of the audience section of the survey.

The answers to both questions were very scattered. Generally, respondents were unable to remember the name of their favourite programme, either because they did not know the name and could only give general answers, such as ‘a government program’ or ‘a news program’, or because they could not qualify any of the programmes they watched as their favourite. Often, respondents could only name the presenter, not the program, which was problematic given the many hundreds of unique responses.

These trends suggest that the audience is divided across a myriad of programmes accessible through satellite television, and that Libyan channels and programmes have great challenges
differentiating and branding themselves and reaching a wide acknowledgement among the population.

However, a list of the six most popular programmes and presenters has been established, and is presented in approximate order of descending popularity.

**Suleiman Dogha** is an Amazigh television presenter who became famous for his media work with Saif Al Islam Ghadaffi. PIs showed that he is particularly disliked amongst young Libyans for his links with the former regime, as well as for being too acquiescent in its interviews with politicians. He has been attacked several times and kidnapped once by a militia from Misrata eight months ago. He currently presents *Ma’a Dogha* on Libya TV at 10pm on Saturdays, a show that exposes and discusses social problems in Libya. Suleiman Dogha has interviewed high-profile guests such as Mohammed Al Megarief.

**Anwar Al Belaazi** is a well-known artist and festivals presenter since the time of the old regime. He is the Director of the General Authority for theatre and cinema and theatre arts, and currently presents *Libyan Street* on Libya One, a show about current political and security events. The show is interactive and is known for receiving many phone calls (around 20) each episode. He also invites guests to discuss social topics such as electricity problems, water issues and the Constitution.

**Sahwat Watan** is a socio-political chat show hosted by Khaleefa Abeedy, and broadcast on *Libya Awalan* at 9pm daily. The programme talks about the daily events and politics in Libya. *Sahwat Watan* has a call-in section and a Facebook page. In PIs, young males from Tripoli and Benghazi reported they stopped watching the show after the presenter Mohamed Emtalel left, as he was one of the main reasons for the programme’s popularity.

**Lamet Khot** is still one of the most popular shows in Libya one year after the revolution. It is a socio-political chat show, hosted by Hassan Al Hassy and Mohammed Msallati and broadcasts live on Libya TV every day at 9pm except Friday and Saturdays. The programme invites a new guest each day (opponents of the former regime who had been living in exile have been typical guest choices). The public has the chance to call them live in the show and to interact online on their Facebook page.

**Rajab Benghazi** is a presenter on *Al Aseemah* television, and he became famous for his humorous style when anchoring *Studio Al Aseemah*, which is broadcast at 9pm daily. Rajab Benghazi also presents on Aseemah Radio in Tripoli. He now has his own show *Agenda Al Sharee* or ‘Street Agenda’.
Mosilsil Waddi Al Deaab is a Turkish soap opera particularly popular in Libya among male and female respondents of all ages. Fieldwork showed that it reached its seventh part now and people are still excited about it. As an interviewee mentioned, ‘the time the show is on even the shops will close’.
RADIO
LANDSCAPE AND CONSUMPTION PATTERNS

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013
Access to Media, Frequency of Use and Main Sources of Information
Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns

Social Media Landscape and Consumption Patterns
Print Media Landscape and Consumption Patterns
Trust and Distrust Regarding Political Information
Government Role in the Media
Summary of Key Findings
Areas of Opportunity
5 Radio Landscape and Consumption Patterns

In 2013, Libya is still deprived of a national radio network able to disseminate messages from the government to all parts of the country. Instead, most cities are home to several public and private local radio stations, which often offer a wide range of programmes tailored for the local audience. Tripoli alone is reported to have 22 private radio stations. Not all these private stations are likely to survive in the long run due to financial limitations and lack of support from the government. Yet, some have managed to build a name and a reputation, particularly through ‘morning shows’. The sub-sections below present the most popular radio stations in Libya and their popularity as of April 2013.

5.1 Radio Landscape

Tripoli

Shababiya FM (‘The Youth’), a former regime asset located on Gargaresh Street in Tripoli, is the main state radio station funded by the government and dedicated to youth. The station only airs music, although in 2012 it broadcast entertainment shows. Based in Tripoli’s planetarium, Sawt Tarablus (‘Voice of Tripoli’) is the official radio of Tripoli’s local council and deals mainly with Tripoli news, events and announcements during its five hours of daily live shows. Al Wataniyah FM, the radio station associated to the national broadcaster Libya Al Wataniyah TV, offers a wide variety of social and political programs, and its news bulletins and political shows are particularly popular with older Libyans. Libya FM, a popular music and news station belonging to the Cairo-based Libya TV satellite channel is close to resembling to a national broadcaster as its signal is broadcast on FM and AM frequencies in several cities across Libya.

Tripoli-based private radio stations include Radiozone, Lebda FM and Al Jawhara. The youthful Radiozone is based in Abu Nawass in Tripoli, and emerged as a radio targeting the general public with satire programmes such as ‘Kalashnikov’, and live music shows such as ‘Zone Unplugged’, a series of live concerts very popular among Libyan families. Lebda FM is also a popular interactive radio station. Although broadcasting mostly in Arabic, Lebda FM is known for having a 90 minute programme in Amazigh language. The station also offers religious programmes with life counselling tips, and games where the public interacts with the presenters, such as ‘Government Club’. Al Jawhara FM (not to be confused with the Tunisian radio with the same name) is a private station broadcasting a mix of political, social and entertainment shows. One of its most popular presenters is Sami Al Shareef, often mentioned in the survey as respondents’ favourite presenter.

Two stations based in Hay Al Andalus, Tripoli FM and Tribute FM, distinguish themselves by programming mostly in English, playing western songs, comedy sketches and hosting English language training programs. Tripoli FM, which broadcasts from Tripoli up to Zuwarah, plans to progressively include Arabic language programmes over the next ten years and eventually to broadcast a balanced mix of English and Arabic. Conversely, Tribute FM will remain an English-only radio station aiming at exposing Libyans to the English speaking world. Presenters from Tribute FM said they would often receive texts from Libyans asking them to explain a joke or a certain term in English.

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18 Interview with a radio station owner in April 2013
**Benghazi**

In Bengazi, *Sawt Libya Al Hurra* distinguishes itself as one of the rare stations airing on AM and FM. Although owned and funded by the state, the station has weak links with the central government. After the burning of the old regime’s *Africa Radio* during the revolution, former staff started *Sawt Libya Al Hurra* and restored the building with private funds. The current management of the Bengazi station does not intend to give the AM frequency back to the state and refuse any government assistance. Pls highlighted that the station was mainly famous for its show *Fazaat Libya* (presenter Abdallah Zaidi from 18:00 to 18:45), which welcomes locals in its studio half an hour beforehand to meet the presenter and discuss their problems during the show. Also notable are the three public radio stations *Benghazi FM*, *Sanabil FM* and *BBN FM*, broadcasting respectively local news, children shows, and cultural-religious programmes.  

Of the private stations in Bengazi, *Al Manara* radio started as an anti-Ghaddafi Facebook page run by Libyans expatriated in Canada, Germany, France and UK, and since then has been turned into a radio. It competes with *Shabab Libya FM*, a youth-oriented private station and *Libya Al Hurra*, the radio station of the television channel *Libya Al Hurra*. At time of fieldwork, *Sawa FM* was being replaced by another private radio called *Aswat FM*. Located in Dubai Street, *Aswat* intends to mix news and entertainment targeting Bengazi’s youth through programmes in Arabic and English. In this landscape, *Tribute FM Bengazi* appears as the main English radio station of Bengazi, located on Independence Street and broadcasting the latest Western hits.

**Misrata**

In Misrata, *Sawt Libya Al Hurra min Misrata* AM is very popular. The station broadcasts the same material on AM and FM, and plans to split the FM and AM functions in the near future and give the AM frequency back to the government. *Sawt Libya Al Hurra min Misrata* aims at talking about the daily life of Misratans (‘the sheikh, the student and the doctor’, according to the manager). In Misrata, the station competes mainly with *Libya FM* (the private station from Cairo), *Sawt Al Madina FM*, *Tubaktes FM*, and the latest English-hit song radio *Flash FM*. The Misrata Media College has just started its own radio named ‘Student Voice’, broadcasting from inside the College.

**Sabha**

In Sabha, *Sawt Sabha Al Hurra* is Sabha City Council’s popular radio station, which offers a range of programmes such as morning shows, sports news, and ‘street conversation’ programmes. The station offers an original ‘emergency programme’ called ‘Free Area’, where people from Sabha have the chance to come to the radio and talk about one of their daily life problems. The presenters then call someone in the government and try to solve the issue. Other radio outlets in Sabha include *Libya Al Wataniyah min Sabha*, the local version of the national radio channel, which broadcasts some programmes from Tripoli’s *Libya Al Wataniyah* after 12pm. The third station is *Libya FM*, a repeat of the private station from Cairo.

**Zuwarah**

In Zuwarah, the main station is *Kasas FM*, an Amazigh radio, which started broadcasting mainly in Amazigh language two months after the liberation of Zuwarah, in October 2011. Located in the former military offices in the centre of the city, it relies on a team of 12 volunteers. *Kasas FM* considers itself as part of the civil society landscape of the city and aims at promoting awareness.

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19 Sanabil FM took the frequency of Ghaddafi’s folk station Tourathia (folk), it is now a children radio.
about democracy and Amazigh culture. At the time of writing, Kasas FM offers one daily live show from 17:00 to 18:00 to discuss social issues in Zuwarah. An interview with the station manager revealed the station needs funding to be sustainable in the medium term, and the management is currently looking for partnerships with the Ministry of Health or the local council.

5.2 SUMMARY OF RADIO STATIONS IN THE KEY CITIES

<table>
<thead>
<tr>
<th>Station Name (Popular Stations)</th>
<th>Frequency</th>
<th>Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shababiyah</td>
<td>88.8 FM</td>
<td>Public</td>
</tr>
<tr>
<td>Radio Libya</td>
<td>90.3 FM, 1251 AM, 11600 SW</td>
<td>Public</td>
</tr>
<tr>
<td>BBC World Service Arabic</td>
<td>91.1 FM</td>
<td>Public - Foreign</td>
</tr>
<tr>
<td>Libya FM (from Cairo)</td>
<td>92.4 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Libya Al Wataniyah</td>
<td>96.6 FM, 1035 AM</td>
<td>Public</td>
</tr>
<tr>
<td>Al Imran</td>
<td>99.9 FM</td>
<td>Public</td>
</tr>
<tr>
<td>Tripoli FM</td>
<td>102.5 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Sawt Tarablus</td>
<td>103.4 FM</td>
<td>Public</td>
</tr>
<tr>
<td>Al Aan</td>
<td>105.3 FM</td>
<td>Private - Foreign</td>
</tr>
<tr>
<td>Tripolitana</td>
<td>87.7 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Tribute FM</td>
<td>98.1 FM</td>
<td>Private</td>
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<td>Al Madina</td>
<td>95.5 FM</td>
<td>Private</td>
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<td>Radiozone</td>
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<td>BBC World Service Arabic</td>
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<td>Public - Foreign</td>
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<tr>
<td>Tribute FM</td>
<td>92.4 FM</td>
<td>Private</td>
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<tr>
<td>Al Manarah</td>
<td>95.5 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Al Jazeera (TV on FM)</td>
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<td>Private - Foreign</td>
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<td>Libiyana HITS FM</td>
<td>100.1 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Shabaab FM</td>
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<tr>
<td>Quran Al Kareem</td>
<td>102.4 FM</td>
<td>Private</td>
</tr>
<tr>
<td>Al Aan (TV on FM)</td>
<td>105.3 FM</td>
<td>Private - Foreign</td>
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<tr>
<td>Sawt Libya Al Hurra</td>
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<td>Flash FM</td>
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<tr>
<td>BBC World Service Arabic</td>
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<td>Tubaktes Quran</td>
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<td>Tubaktes FM</td>
<td>97.5 FM</td>
<td>Private</td>
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<tr>
<td>Atfal FM</td>
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<td>Private</td>
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5.3 PRODUCTION FACILITIES

With some variations across regions, the most advanced radio studios in Libya are owned by the state. For instance, the Zawiyat Dehmani complex contains six radio studios now being used to produce Libya Al Wataniyah. Shababiyah FM, the Tripoli based government radio, did not mention plans to improve its facilities, although this might change in the next months as the station plans to broadcast live shows rather than music only. Most public and private radios stations in Libya have plans to improve their transmitters, widen their coverage, provide training to their staff and catch more advertising revenue. The situation is the same in all the key cities, although different stations have different priorities.

Tripoli

In Tripoli, all private radios interviewed complained that advertisement revenues were not yet sufficient to achieve financial sustainability. Medium-size companies are typically reluctant to invest in radio advertising as the return on investment remains uncertain and the prices proposed by most stations are reportedly too high. Most private radio station owners interviewed said they were waiting for Coca Cola, Unilever and Pepsi to enter the market and advertise on air. However, despite financial limitations, all private radio channels interviewed mentioned plans for short-term improvements. Radiozone has just moved into large studios in Abu Nawass in Tripoli, and has invested in a new transmitter to reach radio listeners beyond Tripoli. (Unfortunately, Radiozone’s radio frequency is the same as a Tunisian religious radio, Zeituna, so that content of both radios often overlaps in the evening, triggering confusion as the content sometimes switches from pop songs to Quranic verses.) Radiozone also plans to launch ‘Zone TV’ during Ramadan 2013. Tribute FM has plans to upgrade its antenna to enable broadcasts as far as Zawiyah, and it plans to add transmitters in Benghazi, Sabha and Misrata. Lebda FM currently claims it reaches as far as Zawiyah and Misrata, but has plans to reach to all parts of Libya and to create new programmes about the constitution.

Benghazi

In Benghazi, Sawt Libya Al Hurra operates from a cramped facility. The station relies mainly on volunteers and lacks equipment. The station does not possess professional mixing tables and has tried to repair their own to ‘survive till the next day’. The station lacks funding and is ‘waiting for the Ministry of Media to help them’. Reportedly, though they claim to offer cheap prices for advertisement, the station managers did not secure any advertising funds over the last year, as most of the advertisements seem to be put on their competitor, Benghazi FM.

On the private side, Tribute FM Benghazi has been relocated two times by the government since they first started broadcasting out of the old Jamahiriya radio Tourathia. As this frequency has

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20 Interview with station manager, April 2013
since been given to the public children’s radio Sanabil, Tribute FM Benghazi now has its own transmitter and studios. However, several technical problems were found with the station’s FM transmitter, and plans have been made to acquire a new one for better quality and coverage.

**Misrata**

In Misrata, the newly-created radio station, Flash FM, has poor coverage and its transmitter does not allow the station to reach beyond Misrata, although this is likely to change as the station’s revenues are reportedly increasing. The studios of Sawt Libya Al Hurra min Misrata were found to be well-equipped and maintained. Interviews with the management of the station indicated that training of staff was needed more than material support.

**Sabha**

In Sabha, Radio Sawt Sabha Al Hurra wants to upgrade its programmes and broadcast local news in order to meet the demands of the local population. The station complained about the lack of support from the government, which only pays for salaries. The management of the radio reported frequent electricity and internet problems and affirmed they had no other option but to ask USAID for help since the government did not support them. Radio Sabha is supported by the Jarma South News Agency, a news agency created by IWPR in January 2013 to cover news in Sabha. IWPR provided Jarma with two offices, computers, internet and other basic equipment as well as a budget for one year. The news agency now employs seven reporters in the South (Sabha, Tragem, Murzuq, Awbari, Ghat, Qatroun, Jufra and Kufrah) and five administrative staff.

**Zuwarah**

Although located in the previous regime’s military centre, Kasas FM’s studios are confined in a modest room with basic equipment. Kasas has no employees and relies on volunteers. Interviews with the manager revealed that the radio could not afford to have a morning show because all volunteers are working during that time slot. Thus, the station only broadcasts live one hour per day, in the evening, which sheds doubt on its ability to survive in the long run if the radio does not receive support soon.

**Picture 4:** Sawt Libya Al Hurra in Benghazi (left), Radiozone live show in Tripoli (centre), manager of Misrata Media College inaugurating the student’s radio station (right)

**Picture 5:** Kasas FM’s antenna and building in the old military centre of Zuwarah (left and centre), the station’s modest studios (right).
5.4 Station Preferences

77% of Libyans say they only listen to Libyan radio, while just 2% have a preference for international radio stations broadcasting on AM or FM. In Tripoli and Sabha, international stations are notably more popular. As for television, preferences for international radio stations in Sabha might be due to the ethnic diversity of the city, as residents belonging to Tebu communities tend to feel side-lined or misrepresented by Libyan media. PIs in Tripoli suggest that males usually tune to international radio only from time to time, in order to get reliable news if they are sceptical of what they hear on Libyan radio.

Figure 33: Preferences for international or Libyan radio (% of respondents expressing preference, three responses, n=2298)

Within the 11% of respondents listening to international radio (614 Libyans), the most popular station is BBC Arabic World Service (14%), followed by Al Aan’s television broadcast over FM (8%), and Al Jazeera’s TV repeat (3%). MBC FM is also popular among international radio listeners, with 3% of the audience. Of all cities, Sabha has the most diverse range of international radio preferences including Rotana, Monte Carlo, Spin Jordan, Tunisia Radio, and Radio France International. As mentioned earlier, this likely reflects the demand of the ethnically diverse local population to access stations providing information that does not misrepresent them.
An Assessment of the Media Landscape and Consumption Patterns

**Figure 34: Most popular international radio stations in Libya** (% of respondents expressing preference, three responses, n=526)

*I listen to local stations more, but for international ones, I tune to BBC Arabic from time to time to get news. The signal is good, the voice is clear and it has a good reputation, it’s an old name.*

Mustafa, 39, engineer, Tripoli

Data about radio preferences is presented by main city as aggregated data does not account for the variety of locally unique radio stations that shape the Libyan radio landscape.

**In Tripoli**, the leading station is the youth station *Shababiyah*, with 29% of expressed preferences, followed by *Lebda FM* with 23%, and *Al Jawhara FM* with 19%. The national radio *Al Wataniyah* registers sixth in Tripoli, with 14%.

![Figure 34: Most popular international radio stations in Libya](image)

**Figure 35: Tripoli radio channels preferences** (% of respondents expressing preference, three responses, n=235)

*I prefer Al Jawhara because they give a voice to all politicians and they can even call the radio back, which is not done in other stations. Once, Jibril called them back to defend himself.*

Belreed, 37, printer shop owner, Tripoli

Data disaggregated by age shows the popularity of radio with youth. The government-funded radio station *Al Shababiyah* is most listened to among teenage Tripolitanians (16-19 years), who are attracted to the music the outlet mainly broadcasts. Also, more than older age groups, PIs showed that younger Libyans have a strong appetite for the English-language stations *Tripoli FM* and *Tribute FM*. Moreover, the interactive and dynamic *Lebda FM* finds its widest audience among Libyans between 20 and 29. Paired interviews highlighted that Tripoli residents in this age group were particularly keen on listening daily to *Lebda’s* morning show. *Radiozone*, its most recent competitor, scored highest amongst Libyans in their thirties. PIs showed that Radiozone was appreciated for its satirical and humoristic tone, particularly among young males in Tripoli. Another interesting finding is that the religious channel *Quran Al Kareem* seems to reach Libyan radio listeners between 40 and 49, as 26% of them declared preferring this station, while not a single teenage Libyan in the survey mentioned it. This indicates the limited interest of young Tripolitanians in listening to religious teachings, songs and debates, contrary to older Libyans.
I listen to Qanat Al Iman, it is important for me to get information about religious problems; I often call the radio about a religious issue and they give me some tips.

Belreed, 37 printer shop owner, Tripoli

In Benghazi, the repeat of Libya FM from Cairo captures 51% of expressed preferences, followed by Radio Benghazi with 41% and Benghazi FM with 32%, which together make up the three most influential stations. Disaggregating by gender, two stations appear more consumed by women than men, Sawt Libya Al Hurra and Benghazi FM. The popularity of Sawt Libya Al Hurra among women was confirmed by several PIs, particularly the programme Fazaat Libya with Abdallah Zeidi. PIs also showed that the Benghazi FM’s evening show ‘Good-evening Benghazi’ (Masa Al Kheir Benghazi) was particularly popular amongst young women. Other shows were mentioned by older women such as the religious show ‘Light of Islam’ (Nour Al Islam) or ‘Political Street’ (Sharee Siyasi), which they reported listening while housekeeping.
In Misrata, the airwaves are dominated by two main stations, Sawt Al Hurra min Misrata, which captures 46% of preferences, and Libya FM (from Cairo) with 40%. Tubaktes FM and Tubaktes Quran radio stations are also popular. Libya FM is more popular among young male respondents, while Sawt Al Hurra min Misrata is more consumed by older women.

![Figure 38: Misrata radio channels preferences by age](image)

*My family and I listen to Sawt Libya Al Hurra in Misrata all day long. I love their news and their briefings.*

Rabia, 25, student advisor, Misrata

*Libya FM is a great radio, it has a lot of entertainment programmes! Ghaghda Ibrahim is the best presenter, especially in the programme ‘Going Home with You’.*

Jamal, 25, student, Misrata

In Sabha, 54% tune into the national radio, Libya Al Wataniyah min Sabha. Libya FM, which is part of the Cairo based satellite channel Libya TV, gains 35% of the preferences. The next most popular station with 33% of the preferences is Sawt Sabha Al Hurra, the city council’s radio station.

![Figure 39: Sabha radio channels preferences](image)

*Libya Media Assessment: One Year Later*

An Assessment of the Media Landscape and Consumption Patterns
Al Quran Al Karim is my favourite station to listen to the Quran. I listen Sabha Al Hurra for local news, because it talks to people in power in Sabha.

Youssef, 33, freelancer, Sabha

In Zuwarah, the airwaves are dominated by two main stations: Kasas FM, which captures 49% of audience preferences, and Libya FM, with 31%. This is followed by Al Jumayl with 20% and Al Aan with 5%. Quran Al Kareem is mostly popular among women above 50. PIs indicated that Al Jumayl was the radio of a neighbouring city of Zuwarah that was regarded by Zuwarans as ‘pro-Ghadafi’, so residents often listen to it in order to learn about goings-on there.

Figure 40: Zuwarah radio channels preferences (% of respondents expressing preference, three responses, n=221)

I love Kasas FM because it is the only station that talks about the issues that happen in Zuwarah.

Ibrahim, 40, NGO employee, Zuwarah

The table below summarises expressed preferences by gender and age groups for the top three radio stations identified in each key city, with highest listenership level within each segment of the population shown in red and the lowest in blue.
5.5 PROGRAMME AND PRESENTER PREFERENCES

Radio programme preferences differ from television programme preferences, and are reflective of the distinct interests of radio listenership. Morning shows are the preferred radio programmes with 36% stated preferences overall. The concept of ‘morning shows’ has gained a wider popularity since the creation of the first ‘free radios’ in Libya, and this is likely due to the habit of listening to the radio in the morning while driving to work or driving children to school. Social chat shows are the second most desired type of programme nationally with 30% of stated preferences across the sample, followed by religious programmes with 24%.

Examining radio programme preferences by city, it appears that Tripoli desires little local news (17%) compared to Benghazi (26%), Zuwarah (24%) and Misrata (22%). This can be interpreted as a reaction to the perceived domination of Tripoli in national news. Interestingly, Tripoli is the city where the demand for religious programmes on the radio is the highest (28%), followed by Misrata (26%) and Sabha (23%), whereas Zuwarah seems less interested in listening to such programmes (17%). Political debates are rather less popular in Sabha than in other cities, and this possibly reflects the desire to avoid fitna (division) between different ethnic groups coexisting in the city. In terms of gender, women are more likely to desire social chat shows, with 36% of stated preferences compared with 24% for men. Finally, less educated Libyans show a much stronger preference for religious shows than more educated Libyans.
Several radio shows and personalities have gained recognition, though to a much lesser extent than with television. When asked to identify a favourite radio show or presenter, less than 8% of the population was able to answer with a precise name. Lebda FM’s morning show with Bushra Kareem was the most popular, as well as Libya FM’s re-broadcast of Libya TV’s programme Lamet Khot (see television programme section). The shows of Suleiman Dogha and Rajab Benghazi seem as popular on radio as they are on television. A handful of respondents expressed their enthusiasm for Jawhara FM’s presenter Sami Al Shareef and Radiozone’s presenter Fouad El Gritly. Some of the most popular presenters are shown below.

**Boushra Kareem** is a presenter on Lebda FM’s popular morning show from 8 to 11 am. She is also presenting a new health programme called *Flora*. Before the revolution Boushra Kareem used to work at Shababyia FM. Most of her audience is of a young age.

**Fouad El Gritly** presents the morning show on Radiozone daily at 8:00 am. He is known for speaking about every topic freely without taboos with his colleague Ameera. His sense of humour and satirical comments are particularly appreciated by young to middle aged Libyans, who like his honesty and his ability to open debates about any social or political topic in Libya.
Sami Al Shreef is the well-known presenter of *Kalam Houkoma* (‘Government Talk’) on *Al Jawhara FM*, daily at 18:00 pm. He is known for his dynamic tone and for triggering intense debates on air. His audience mostly consists of middle-aged to old Libyan males. Libyans acknowledged they appreciated the fact he gave a voice to different political groups and provides politicians with the opportunity to call the radio to defend their point of view on air.

Abdullah Al Zaydi is a presenter working at *Sawt Libya Al Hurra* radio. He was a Colonel under the previous regime, and is very critical of the current government, which makes him one of the most controversial presenters at present. Pls showed that many people believe he spreads rumours through his program.

Mostafa Alaga is a famous presenter in MBC1, frequently mentioned in the survey. He presents a daily sport programme 11 pm. Mostafa Alaga is also a journalist, writing about ten sports articles per week in many newspapers and magazines such as *Alitihad* and *Alsharq Al-Awsat*. 
Libya Media Assessment: One Year Later

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013

Access to Media, Frequency of Use and Main Sources of Information

Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns

Social Media Landscape and Consumption Patterns

Print Media Landscape and Consumption Patterns

Trust and Distrust Regarding Political Information

Government Role in the Media

Summary of Key Findings

Areas of Opportunity
6 SOCIAL MEDIA LANDSCAPE AND CONSUMPTION PATTERNS

Social networking and video-sharing webpages are the most visited international webpages in Libya. Of these, Facebook is the most popular foreign webpage, and as such, this section will purposely focus on Facebook more than other websites and will tackle respectively Facebook access and consumption patterns in Libya. Slightly more than a quarter of the overall Libyan population is registered on Facebook, with males and youth having a slightly better access to the social network. Once browsing Facebook, Libyans interact with each other, look for events to attend in their city, and look to inform themselves.

6.1 PREFERRED INTERNATIONAL WEBSITES

When browsing international webpages, most Libyans prefer spending time on Facebook (58%). The video sharing platform YouTube appears as a second choice (21%), highlighting Libyans’ appetites for videos as a source of both entertainment and information. The micro-blogging interface Twitter ranks fourth (9%) after the research engines Google and Yahoo, and remains marginal compared to Facebook. The relatively low popularity of Twitter may be due to the fact the interface was not available in Arabic language until March 2013, thereby restricting access to a minority of English speaking Libyans. Also notable is the small but significant share of Libyans mentioning various instant messaging services (Nimbuzz, Yahoo, Hotmail, etc.) as their favourite international pages (4%).

Figure 43: Preferred international websites\(^{21}\) (% of respondents expressing preference, three responses, \(n=1418\))

My favourite websites are the ones where you can upload movies and music, YouTube and Facebook for instance.

Ahmed, 25, student, Tripoli

\(^{21}\) Responses such as ‘Yahoo, Google…’, referring to search engines, and ‘Nimbuzz, Skype…’, referring to chat services websites or applications are not directly relevant to this study, and as such are not displayed in the following graphs.
Twitter is dominated by a small elite in Libya, it is less emotional than Facebook in general.

Rania, 28, doctor, Tripoli

As expected, young Libyans are significantly more familiar with social media than older respondents. Among Libyans connected to internet, 71% of the youth aged between 16 and 19 years declared to be registered on Facebook, against just 36% for Libyans above 50. The same trend is observed for YouTube. Al Jazeera’s website is rather less popular with Libyan teenagers than with older Libyans.

![Figure 44: Preferred international websites by age groups (% of respondents expressing preference, three responses, n=1418)](image)

The best website is Facebook because it is very fast and it has a good ability to convey news and make us communicate with each other at the same time. It is both a vector of news and a forum.

Jamel, 25, French student, Benghazi

Why Facebook? Because there is a freedom of expression you cannot find anywhere else in this country.

Amira, 25, student advisor, Benghazi

6.2 Facebook Access

26% of the Libyan population declared having one or more Facebook accounts. Among internet users, 58% have one or more Facebook accounts, with males being more likely to have a Facebook account (63%) than women (52%). Overall, young males with secondary or tertiary education are the most likely to have a Facebook account, whereas those who are disconnected from Facebook usually feature the same socio-demographic characteristics as those who are disconnected from the internet, i.e. low education levels and of older age.
Further disaggregation by location shows a high level of Facebook access among internet users of Tripoli (66%), Benghazi (65%), Zuwarah (63%) and Sabha (62%), to be compared with Misrata (57%) and a significantly lower access in the other districts (50% on average). This trend is likely related to levels of internet access, especially for Tripoli where 53% of the population have access to internet compared with the national average of 40%.

**Figure 46:** Facebook penetration by city, for internet users (n=1418)

### 6.3 Facebook Consumption Patterns

Respondents who declared having a Facebook account were asked to describe how they spend most of their time on Facebook. PIs and national survey results show three main types of Facebook usage: political, social and leisure. These categories often overlap and complement each other in various combinations depending on the user considered. Furthermore, qualitative research indicates that some Facebook users have multiple Facebook accounts for different purposes, e.g., studies, work, or pursuing relationships.
6.3.1 Political Awareness

Some respondents regarded Facebook mainly as a political tool and a source of information. These users declared spending a lot of time on Facebook reading national news (30%), local news (15%) and international news (12%). Only 13% declared using Facebook to share political views on Facebook, which indicates that only a minority of users are politically active on Facebook (e.g., posting comments, participating to debates, spreading news), while the majority is ‘receiving’ news.

Only 14% of Facebook users report visiting pages from political parties, the majority of these mentioning Tahalof Alkoa Alwatania (‘National Forces Alliance’, the democratic-liberal alliance led by Mahmoud Jibril) and Hizb Al Adalla wa Albena (‘Justice and Construction Party’, the Islamist party led by Mohammed Sowan). 20% of Facebook users report visiting pages of government entities, including, for the most part, the GNC, the Prime Minister (14%), the Ministry of Interior and the Ministry of Education. PIs showed that the purpose of these visits is mainly to gain information about government policy, but also to verify information obtained from a third party.

*I don’t visit the Government’s or the Prime Minister’s Facebook pages, because in these pages they always talk about themselves, and they don’t talk about the real problem of the people.*

Amira, 25, student, Benghazi

*I visit the GNC page, they explain a lot of problems that touch me personally. I trust these pages because they are supported by videos, and you can find personal accounts of members of the GNC there.*

Siraj, 24, student, Sabha

*I visit the page of the party of Mahmoud Jibril on facebook to test how trustable they are, and how they communicate with other political parties. But I also visit Al Adala Wal Bina to check how they communicate as well with other parties. I do not visit the Prime Minister’s page, because I am not sure it is officially for the PM.*
Pls in Zuwarah showed that Libyans often resort to ‘secret accounts’ to investigate ‘pro-Ghaddafis’. This phenomenon is echoed in the radio consumption patterns of Zuwarah, where a fairly large share of the population declared listening to the radio of the neighbouring ‘pro-Ghadaffi’ city Jumayl.

Politically active Facebook users frequently use their Facebook page as a political blog to post articles and share comments with fellow activists. Some ‘bloggers’ progressively attract a larger group of followers outside of friendship links, and become part of an informal network of political commenters who shape the public debate at a larger scale and thereby gain relative authority. Informal network participants then become part of a coherent community that revolves around common opinions and interests.

According to former revolutionary fighter Nader Al Gadi, blogging in Libya mainly happens through Facebook. As he says, ‘Twitter is for Libyans living abroad, but it is coming’.

Al Gadi’s online activism started with the revolution, as he was a member of the ‘Tripoli brigade’ in Tunisia, using his phone to send pictures to his contacts in the United Kingdom. Al Gadi managed the ‘communication section’ of his brigade, using Facebook and Twitter to upload videos and messages of brigade members. When asked to describe his page, Nader declared that his ‘Facebook page has become a political platform, there are long threads of political fights and debates on it’.

In the course of the interview with Altai, he mentioned two axes of tensions across Libyan Facebook users: the tensions between liberalist and more conservative pages, such as fighting over the political isolation law, and the tensions between federalist and anti-federalist pages. Al Gadi is also sceptical about the capacity of Facebook to foster more advanced political reflection. ‘In the art of debating there are rules. What happens in Facebook is not debating’.

Al Gadi illustrated the dynamics between Facebook and Libyan society by referring to a picture he once took of an impoverished girl selling tissues in Tripoli. Once on Facebook, the picture ‘went literally viral’, and received a lot of comments saying that there should be no poverty in Libya and that ‘the girl was not Libyan’. He was contacted by local NGOs on Facebook and started to meet with them and organize a campaign: ‘I see myself as a messenger, I take pictures. But this time I couldn’t wait for the government to take action’. Eight NGOs started together the ongoing ‘Save the Old City’ campaign to shed light on poverty issues in Tripoli.
6.3.2 Social Awareness

Facebook is also used as a tool of socialization. Inevitably, catching up with friends inside and outside of Libya is popular, as 28% and 19% of Facebook users respectively say they spend a lot of their time doing this. 11% of users declared using Facebook mainly as a way to meet people in order to find a relationship. Further exploration of the data indicated that looking for relationships on Facebook was more common among men than women, and among young people rather than older ones.

PIs conducted among young males in Tripoli and Benghazi confirmed the phenomenon, and showed that young Libyans are likely to have not just one, but several Facebook accounts for several purposes. In the context of a PI in Tripoli, Ashraf, a student in medicine, remarked that he had no less than 12 Facebook accounts: one for family and friends, others for girlfriends and flirting, as well as several where he presents himself as a female user in order to attract women’s friendship and ‘have more female fans’, and then show his real identity. The PIs showed that some (male) Facebook users would resort to fake names, and animal identity pictures in order to preserve their anonymity and fool their friends.

6.3.3 Entertainment

Many Facebook users see Facebook as a synonym for entertainment and distraction. For 40%, looking for events in the city they live absorbs most of their time on Facebook, whereas 10% see it as a way to ‘kill time’, and escape from boredom or work. This can be linked to the thirst for events and outdoor activities among Libyan youth, who often complained during PIs about the lack of entertainment and leisure activities available in Libya.

6.3.4 Favourite Facebook Pages

The national survey, PIs and case studies helped to define the most popular Libyan Facebook pages. Answers from the national survey were scattered across a wide range of Facebook pages,
and respondents often gave unique answers, indicating there are nearly as many preferred Facebook pages as there are individuals. These unique answers were coded into ‘other’.

**Figure 48: Most visited pages among Facebook users (n=842)**

Qualitative interviews with Libyan bloggers and PIs highlighted the existence of key categories of Facebook pages used by Libyans themselves to describe the content they browse. It was observed that these categories tend to help Libyans situate each other in the political, religious, and cultural spectrum and define their identity. Four categories have been identified:

- **‘Pro-Libya’ Facebook pages**: Libya Faqat (Libya Only), The 17th of February Revolution, Bil Liby (Libyan Way), Al Khal (The Uncle), Free Libya, etc. These pages were among the first to be created in the aftermath of the revolution. They are popular among Libyans of all ages and backgrounds and embody Libya’s unity on Facebook. PIs showed that patriotism was a very new thing to Libyans, and some respondents said that before the revolution they would never have thought of joining a Facebook page praising Libya.
- **‘Federalist’ Facebook pages**: Federalism, Yes to Federalism, etc. These pages advocate for Libya to become a federalist state. These pages are especially popular in Benghazi and Sabha.
- **‘Martyr’ Facebook pages**: Rebels of the 17th of February Revolution in Sabha, in Tajoura, in Ben Ashour, in Misrata; Misrata the Victorious, Missing people in Libya; etc. These pages provide regular updates on the situation of the wounded people, for instance looking at whether they received medical care or not. These pages have a strong focus on Libyan news as they try to monitor whether the revolution has achieved its first goals.
- **‘Socio-Religious’ Facebook pages**: Here, the official page of the Grand Mufti of Libya and Head of the Supreme Council of Fatwa, Sheikh Sadeq Al Gharyani, is very influential. The page, called ‘Dar Al Iftar Al Libiya’ issues statements about what is considered as right and wrong and answers, by phone or Facebook posts, the varied requests of Libyans. Respondents in PIs also mentioned they liked the pages of Egyptian sheikhs such as Ahmed Abda Awad (‘I love his fatwas’) or clerics from Saudi Arabia such as Mohammed Al Arifee (‘he hates Ghaddafi like me, and gives good talks’).
**Figure 49: Most popular Facebook pages in each of the identified Facebook categories**

- **PRO LIBYA:** Libya FAQ 246k Likes
- **FEDERALISM:** Yes to Federalism 8k Likes
- **MARTYRDOM:** Rebels of the Revolution from Sabha 36k Likes
- **RELIGIOUS:** Dar Al Iftah Al Libiya 73k Likes

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**I follow the federalist pages on Facebook to expand my knowledge, and to encourage federalism.**

Siraj, 24 student, Sabha

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**My favourite is the page of Al Sheikh Al Arifee [Saudi Arabian mufti]. It expands my knowledge of religion.**

Ibrahim, 38, freelancer, Benghazi
LIBYA MEDIA ASSESSMENT: ONE YEAR LATER

An Assessment of the Media Landscape and Consumption Patterns
PRINT MEDIA
LANDSCAPE AND CONSUMPTION PATTERNS

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013
Access to Media, Frequency of Use and Main Sources of Information
Television Landscape and Consumption Patterns
Radio Landscape and Consumption Patterns
Social Media Landscape and Consumption Patterns

Print Media Landscape and Consumption Patterns
Trust and Distrust Regarding Political Information
Government Role in the Media
Summary of Key Findings
Areas of Opportunity
7 Print Media Landscape and Consumption Patterns

No media sector is perhaps as locally diverse as the publications landscape. The few that read newspapers in the key cities have a strong preference for locally published newspapers, showing that Libyans are generally not reading the same newspaper across the country, despite efforts to improve the quality of journalism and the distribution system. Access to newspapers is inequitable among men and women and also between urban and rural settings. The following section will present the newspaper landscape and consumption patterns in Libya.

7.1 Newspaper Landscape

In the aftermath of the revolution, Libya saw the emergence of countless publications. Only a few have managed to survive the first year of transition. Concerns are now rising about the professionalism, deontology, distribution, and financial sustainability of what appeared not too long ago as the country’s most stable newspapers. This section provides a mapping of the publication landscape in major cities, followed by a snapshot of Libyan’s consumption patterns of these media.

Government Newspapers

Two years on from the revolution, Febrayr remains the most popular governmental newspaper in Libya. Febrayr is published daily by the National Press Organization at 0.5 LYD per copy. In terms of content, the newspaper has not evolved much since 2011, and mainly consists of national news (the first two pages), international news related to Libya, followed by cultural, social and sport pages and from time to time an ‘entertainment and art’ section. As for advertising, the newspaper displays eight full pages of advertisements (government and private), against only three pages in 2012. Febrayr offers different prices for advertising, with the price list available soon on their webpage (under construction as of April 2013).

Available since April 2012 at the price of 0.5 LYD per copy, Libiya stands out as a government funded newspaper from the Ministry of Culture and Civil Society. This daily newspaper covers a variety of topics with a focus on Libya’s political scene and national issues. The newspaper’s chief editor underscored the efforts of the outlet to address sensitive state-building issues such as katiba (brigade) related tensions. Libiya avoids publishing any material that might hurt the sensibilities of families, and regards itself as respectful of Libyan society’s norms and traditions. Like many other printed media outlets, Libiya lacks trained editors and journalists. Concerns were raised by the editor that the few qualified Libyan journalists ask for ever-increasing salaries, and are becoming too expensive for government publications.

Private newspapers

Qureyna Al Jadeedah is a former government-funded paper created by Al Ghad Media, a group created by Saif Al Islam Gaddafi before the revolution. The newspaper was privatized in 2012 and is now under the ownership of Fathi Youni Alkhashmi,
and is based in Benghazi. Qureyena Al Jadeedah remains one of the leading newspapers published in Libya. The newspaper covers political news, entertainment, jobs, travel, sports, economy, culture, business and foreign press and is available online.

The first private newspaper to be published in Tripoli, Orus Al Bahar, ceased printing due to severe cash shortfalls in 2012, although some people still mentioned it as their favourite newspaper in the survey. This is indicative of the challenges private newspapers are currently facing to achieve financial sustainability. Other private newspapers include the weekly business newspaper owned by the Union of Chambers of Commerce Mal wa Amal, and the generalist newspaper Tripolis. Very few English-speaking newspapers have emerged and appear sustainable so far, with the exceptions of The Libya Mirror, The Tripoli Post, and Libya Herald’s Business Eye. Finally, many claim that private newspapers are starting to develop their own agendas: the newspaper Libya Al Taghayer was often mentioned in Pls as the publication of the member of Congress Guma El Gamaty and his party, Al Taghayer.

**Regional Newspapers**

Only a handful of regional newspapers have proved to be financially capable enough of sustaining themselves through the post-revolution period. A wide range of local papers are found in Misrata, including Al Etilaf, Tripoli Street, and Wifaq Libya. Among them, Wifaq Libya is most popular with young Misratans. The newspaper, which describes itself as ‘youth-focused, national and informational’ started as a Facebook page and now prints more than 3000 copies per week in Misrata, and then distributes to Tripoli, Benghazi and Misrata. However, most of Misrata’s papers are biweekly and have very little recognition outside of the district.

In Sabha, three newspapers stopped publishing in 2012 due to cash flow issues (Sabha Times, Sabha Al Jadeeda and Sabha Al Hurra). The newspaper landscape in Sabha is now dominated by Fezzania, a weekly 16-page newspaper printed in Sabha and distributed across Libya (1000 copies each in the eastern, western and southern parts of the country). Fezzania plans to improve its standards of publication by becoming a daily newspaper, addressing new topics, and sending its staff to international training programmes. In Zuwarah a couple of newspapers were created in the aftermath of the revolution, yet none of them managed to survive in the short term due to financial difficulties. At the time of writing, Zuwarah does not produce any significant publication.

**Foreign newspapers**

Akhbar Al Aan is the main foreign publication, and is a Libya-focused newspaper produced in Dubai by a wealthy Libyan expatriate, and is fairly popular. Al Aan is printed in Tripoli at a volume of 3,000 per week since 2011, and is given away for free. Al Aan can be found in coffee shops, supermarkets, bookshops and public libraries. The newspaper covers local and national news in the first two pages, and displays a Middle East section as well as economic and health-related news. Al Aan offers more advertising content than written articles, and advertisements are produced by Al Wahed media Service Company in Tripoli.
Libyan newspapers have a lot of mistakes in the grammar; they must have someone to check the spelling. Once I read an article, I nearly found 10 mistakes in it!

Fatima, 43, teacher, Tripoli

Most of the private newspapers are expensive and hard to get so we take the government newspaper because we need to know what is happening around.

Ahmed, 33, Doctor, Tripoli

Competition should take place between newspapers, it will create a new type of credibility, they will fear to disappear and try to save their name.

Jamal, 25, student, Misrata

7.2 Magazine Landscape

Although not as popular as newspapers, magazines in Libya are slowly gaining the recognition of the Libyan public. Respondents in PIs recognised that magazine quality has improved and that more varieties are available, while at the same time believing them to be too expensive for the content. Thus, sustaining magazines financially appears to be very difficult. In Tripoli, the two most popular magazines in the 2012 survey, Luluat Al Mitawasat and Al Liby, have stopped publishing for financial reasons, but have been replaced by new ones such as Al Maraa Magazine, which started to be distributed at the time of writing. The magazine Sharia Liby remains one of the most popular in Tripoli and publishes a balanced mixed of social and entertainment articles. Topaz is a Benghazi magazine aimed at a female audience, while Zuwarah has a local magazine in Amazigh language, Tawalit. Most magazines are privately funded in Libya, except for Roya, published in Benghazi by the Journalist Support Association.

Some foreign magazines are also available, such as Zahrat Al Khaleej, a private magazine published in United Arab Emirates and one of the most popular magazines in Libya according to qualitative research conducted in Tripoli.

Libyan magazines are much better than before, they are competing international ones in my opinion

Safeia, 24, student, Tripoli
7.3 Print Media Preferences

Respondents who do read publications were asked to list their top three newspapers. 19% of Libyans who read newspapers chose the rebranded GMC newspaper Qureyna Al Jadeedah, making it Libya’s most popular newspaper, followed closely by government-funded Febrayr with 18% of the readership. Akhbar Al Aan, the free foreign produced newspaper has a 9% readership, followed by Orus Al Bahar and Libya Al Jadida with 4% each. Thus, the government has a fairly strong position in the publication outlets, as mirrored in television and radio preferences.

Note: As only around 10% of the population reads newspapers on a daily basis, all the results in this section are based on a sample size of around 320. Results, especially for age or location disaggregations, must be interpreted with caution, cognisant of the increased margins of error.

![Figure 50: Libya’s most read newspapers (% of respondents expressing preference, three responses) (n=903)](image)

Febrayr wa bas! (‘Febrayr only!’) It is the best and I trust it because it doesn’t take any side. It is always updated to the latest news and talks about social events all around Libya. I also read Qureyna but I think they have an agenda.

Mohamed, 40, Employee, Tripoli

Education and location appear as critical factors to explain Libyans’ newspaper preferences. Examining the data by education level, it can be seen that the least educated people only recognise the top newspapers Qureyna Al Jadeedah and Febrayr, while respondents having completed tertiary education tend to recognise and read a wider variety of newspapers. In terms of location, the two most famous publications are most appreciated in the location where they are printed. Thus, Qureyna Al Jadeedah is most popular in Benghazi, and Febrayr in Tripoli. In Sabha, the local newspaper Fezzan is preferred to national newspapers with a readership of 23% for Fezzan against only 11% for the two ‘national’ newspapers Qureyna and Febrayr. This is likely due to the lack of news about Sabha in national newspapers, as well as the difficulty to access national newspaper in Sabha.
Figure 51: Libya’s most read newspaper by cities (% of respondents expressing preference, three responses, n=903)

Febrayr is the only newspaper I trust, I buy it every morning. My husband prefers Al Kalima and Qureyna more than Febrayr, we always fight about it!

Fatima, 35, nurse, Tripoli

Newspaper readers were asked whether newspapers could be easily found in their location. As might be expected, newspapers are more difficult to find in Sabha than in any other city, probably because of the limitations of the current Libyan distribution networks. Most newspapers are distributed by two players, the Mukhtar Company in Tripoli, and the Al Fares Company in Benghazi. Newspapers use one or both of these companies to distribute across the country at locations specified by the newspaper owner. Young males in a PI in Sabha suggested they read newspapers ‘very rarely’ and asserted that problems finding newspapers was the main reason why.

People living in rural areas find it more difficult to access newspapers than city dwellers, as 36% of them find publications are not easily accessible, compared with 26% for city dwellers.

Also notable is that women in certain cities tend to find it much more difficult than men to access newspapers. This is particularly striking in Misrata and Sabha, where 42% of females declared having trouble accessing newspapers, compared with 22% of male respondents drawing the same conclusion. Pls with females in Misrata indicated that women’s access to publications was limited because they rarely walk alone in the city. When asked how their access to publications could be improved, women in Misrata asserted that the best place for them to buy newspapers would be a shopping mall, where they feel more protected and comfortable than in the street.
I read newspapers very very rarely, because I can’t find them.

Ahmed, 36, freelancer, Sabha

I read newspapers only three times a month. It is hard to buy it for a woman because few women go out alone in public places in Misrata. We don’t have malls for shopping, so we need to go in the street.

Rabia, 25, student, Misrata

It is easier for men to get newspapers. For us it is not recommended, as we have to walk alone in the street.

Manal, 44, housewife, Misrata

7.4 ARTICLE PREFERENCES

Desires for published articles align broadly for desires for television programs. Local news appears as the most desired type of published article, selected by 33% of the population, followed by national news. Political analysis articles were also highly desired, rather more so than on television and radio, perhaps indicating the preference for capturing this information through published media. Also notable is that publications are not seen as important vectors for either international news or religious articles.

In sum, newspapers readers are mostly looking for national and local news when opening a newspaper, revealing the need for a better understanding of the issues at stake in their country. Indeed, fieldwork in Tripoli suggested that newspaper readers are eager to understand the latest reforms of the government and to read official statements and news about the political process. This indicates that Libyans expect newspapers to clarify the political game at play and to provide grids of analysis to help them interpret the complexity of the transition phase the country is going through.
Different types of articles are preferred in different locations. In Misrata, people want newspapers to provide martyr and revolution articles. This is probably related to the role played by the city during the revolution, and its reputation as ‘the city with the most martyrs’. The results here confirm ‘the word on the street’, as martyrdom is a common topic of conversations and pictures of martyrs are still widespread on the walls. In Sabha and Zuwarah, two of the most ethnically diverse cities sampled, people perceive publications as a medium for promoting their own culture. In both cities, 25% of newspaper readers express a preference for cultural articles, compared with 18% at the national level. This may be indicative of a need for these ethnic groups to gain wider recognition in the Libyan media landscape and consolidate their cultural identities in a time of transition.

Finally, almost none of the survey respondents could name a journalist or feature article that they liked in any newspaper, indicative of the very low penetration and following of newspapers across Libya.
TRUST AND DISTRUST
REGARDING POLITICAL INFORMATION

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadafi-era Media to 2013
Access to Media, Frequency of Use and Main Sources of Information
Television Landscape and Consumption Patterns
Radio Landscape and Consumption Patterns
Social Media Landscape and Consumption Patterns
Print Media Landscape and Consumption Patterns

Trust and Distrust Regarding Political Information

Government Role in the Media
Summary of Key Findings
Areas of Opportunity
8 TRUST AND DISTRUST REGARDING POLITICAL INFORMATION

Still coping with the legacy of 42 years of autocracy, Libyans remain vigilant as to which media outlets they trust. If a serious event was to happen in the country, most of them would first turn on national television but a large share would also listen to family and friends to verify the accuracy of the information.

So far, the national broadcaster Al Wataniyah appears as the most trusted television channel, probably due to its perceived neutrality in the current context of increased politicization of the media landscape. Conversely, Libyans express a rather low level of trust in the political information they read on Facebook.

8.1 OVERALL TRUST ACROSS MEDIA

When asked where they would go to verify information in case of a serious event occurring, 68% of Libyans said they would check Libyan national television, followed by family and friends with 37%, and international television with 24%. The importance of ‘family and friends’ and ‘coffee shop’ among other modern media reflects a complementarity between modern means of communication and more traditional frameworks of sociability, such as the family and the community. In PIs, people expressed their desire to go ‘directly to the site where it happened’, to see with their own eyes.

Far from being exclusive, these two dynamics seem to participate in the same cycle of consolidation of information. This cycle starts with the reception of the information and leads to its dissemination amongst other trustworthy, sometimes better informed acquaintances in order to verify and share reactions.

**If a serious event happens in Libya I would first go to my close friends, then TV. If something happens in Sabha, we will call each other because we all know each other.**

Youssef, 37, Employee, Sabha

**If something was to happen in Libya, I would check on Facebook first then call a friend in the army.**

Jamel, 25, Student, Misrata

These dynamics often vary across demographic groups. In terms of gender, females are much less likely to go to the coffee shop (5%) than males (11%). In PIs, middle-aged women in Misrata repeatedly expressed their reliance on links of kinship (husbands, sons) to ensure themselves of the veracity of information. Female friends or relatives were almost never mentioned, possibly because Libyan traditions assign men a social position where they are more exposed to the outside world. PI respondents often mentioned they would not be satisfied by consulting one source only: they would turn successively to their contacts and to television to validate the information and protect themselves from rumours. Almost nobody would go to the mosque to confirm the accuracy of information in this situation.
8.2 TRUST IN TELEVISION CHANNELS

Trust in five of the most popular television channels was tested in the survey, which led to the finding that Al Wataniyah is the most trusted channel in Libya, with 54% of Libyans ‘trusting’ or ‘strongly trusting’ it. This was followed by Al Hurra and Al Ahrar (42%). Libyan channels are more trusted than international channels such as Al Jazeera and BBC Arabic.

PIs steadily raised the issue of ‘agenda’. Consistently, Al Jazeera was perceived as having ‘an agenda for Qatar’, Al Hurra for the federalists, the city of Benghazi and the Muslim Brotherhood, Misrata TV for the city of Misrata, while Al Aseemah and Al Dawliya were associated respectively with liberal agendas and Mahmoud Jibril, Libya’s former interim Prime Minister. Overall, Libyan media outlets are increasingly accused of promoting certain agendas related to their owner’s political views, the location from which they broadcast, or the areas in which they are most popular.
TRUST AND DISTRUST REGARDING POLITICAL INFORMATION

Nowadays people associate TV channels with ideologies. For example they say ‘Al Aseemah, channel of the conflict’, ‘Libya Ahrar, channel of the devil’ (Qanat al Ashrar) because of spreading rumours, ‘Misrata TV, channel of militias’ (Qanat al Milishiat), ‘Al Hurra, channel of the Muslim Brotherhood’ (Qanat al Ikhwan)...

Abdallah, 45, reporter, Tripoli

8.3 TRUST IN FACEBOOK

Internet users expressed a low level of trust in Facebook, with only 5% trusting the political information they read on the social network, compared with 41% ‘distrusting’ or ‘strongly distrusting’ this source of information. A large proportion of internet users expressed scepticism, with 17% answering they would systematically ‘verify elsewhere’, indicating that Facebook is not considered as an entirely satisfying source of information by many.

I don’t trust any news on Facebook, 90% of what’s on Facebook is all about rumours

Marwa, 17, student, Tripoli
When asked what makes the information on Facebook trustworthy, 16% of internet users said that hearing the same news again in street or coffee-shop conversations would make it more believable, showing the importance of triangulation. For 16%, trusting or knowing personally the administrator of the Facebook page makes its content more reliable. In PIs, pictures and videos were often mentioned as a determining driver of trust.

‘I trust news on Facebook 70 %, because they put pictures and videos with the news’

Soad, 24, student, Sabha

‘Facebook is trustworthy, but only if there are pictures and videos to show the news is not just a rumour’

Siraj, 24, student, Benghazi

Figure 58: What makes the information you read on Facebook trustable? (n=496)

My favourite page is Misrata The Victorious fan page. I trust it because I know the administrator.

Jamel, 25, employee, Misrata

Findings regarding trust and distrust towards information amongst Libyans lead to identification of factors that need to be taken into account to understand information flows and optimize their understanding. In the process of verifying information, Libyans assess credibility of news received with regards to:

- The source of information, i.e. the interests or agenda of the people or organizations broadcasting the information;
- The medium of information, with visual supports such as videos and pictures being perceived as being the most credible.

This verification process then continues by triangulating various sources of information, each of which is assessed with respect to the two dimensions outlined above. This is typically done through the collection of a mix of media and personal information, which allows Libyans to process the information and decide on its credibility.
Thus, keeping channels of information as reliable as possible has become a priority for Libyans, both to mitigate the risk of rumours being spread and to prevent groups with vested interests manipulating the information being broadcast. This leads Libyans to ask which regulation systems would be the most appropriate to safeguard informational reliability, a topic that is considered in the final section of this report.

**CASE STUDY: FACEBOOK POLITICAL USAGE**

An in-depth case study was conducted with a young woman from Tripoli in order to map out her political usage of Facebook and provide an understanding of the functioning of her ‘opinion community’. An intensive Facebook user, she was first asked to list the pages she would find the most useful to help her analyse the political situation in Libya. Each page was analysed in terms of overall popularity (i.e., number of ‘likes’) and in terms of popularity amongst her friends (i.e., number of shared connections).

Links proposed by each page were mapped out to understand which sources of information they were using the most. She was then asked to comment freely on the friends who shared her preference for each given page, which led to the identification of opinion leaders among the community. Thus, the following layers were identified:

- A first series of Facebook pages (dark blue) provide sources of information that are external to her network (with significantly fewer connections shared across friends), including:
  - Mainstream international news channels (e.g. Al Jazeera, BBC Arabic);
  - Alternative international sources of information (e.g. Wikileaks);
  - Other communities based outside of Libya (e.g. Syrian Martyrs, Pakistan-based groups);
  - National news channels (e.g. Radiozone, Al Aseemah);
  - Institutional Facebook pages (e.g. Prime Minister’s page, Political parties pages);
  - Alternative sources of information from other communities that promote opposing opinions (e.g. Federaliya).

- A second series of Libyan Facebook pages (orange), usually from groups of individuals that transmit news and publish political comments, liked by more than 10% of her friends and with an overall ‘Like’ score greater than 50,000 users (corresponding to the first question).

- Finally, a third series (red) is comprised of individuals, often immediate friends, who appeared particularly engaged in politics, either as firm partisans of a certain ideas (e.g., nationalism or federalism) or as local news transmitters (e.g. individuals in Benghazi or Misrata).
The diagram summarises the results of this case study. Shapes in light grey indicate the presence of other networks and communities that may or may not be linked with the community this case study focused upon. The size of each page mentioned depends on the relative importance of the page in the eyes of the woman at the centre of this case study. To avoid misinterpretation, it is worth mentioning that mentions of certain pages should not be broadly generalized; the purpose of the case study is to show how a political Facebook community can emerge around a limited number of key players and how it is then structured, rather than indicating most visited pages among the population. It is also important to remember that most pages presented in the diagram are connected to a wider variety of other political and apolitical pages, thus opening a myriad of other communities of interests.

The case study highlights the critical importance of the second and third series of actors for synthesising and channelling information and political analysis to the wider audience. The first series of mainstream media do not seem to provide information directly to those users who only occasionally show interest in political or international events.
LIBYA MEDIA ASSESSMENT: ONE YEAR LATER
An Assessment of the Media Landscape and Consumption Patterns
GOVERNMENT ROLE IN THE MEDIA

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013

Access to Media, Frequency of Use and Main Sources of Information

Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns

Social Media Landscape and Consumption Patterns

Print Media Landscape and Consumption Patterns

Trust and Distrust Regarding Political Information

Government Role in the Media

Summary of Key Findings

Areas of Opportunity
9 Government Role in the Media

Overall, the population demands much more control over media outlets. Libyans are united in their desire for media accountability and financial transparency (82%), and a majority believes that government entities should be responsible for ensuring this.

9.1 Constitution Awareness and Communication

Television is the favourite Libyan media for learning about the constitution-writing process (63%). This preference for television coincides with the high rate of access to satellite television across Libya and that television is the favourite source of information amongst Libyans. This is followed by websites, public speeches and billboards each with approximately 5%. Only 2% of the sample believes Facebook is a good platform to learn about the constitution-writing process, highlighting the narrow window of opportunity this vector offers for potential constitution awareness campaigns.

![Figure 59: Preferred vectors for learning about the constitution-writing process. Overall (left), by education (right) (n=3196)](image)

9.2 Public Media and Government Control

A majority of Libyans think there is a need for a national broadcaster and 78% of respondents asserted that the government should be funding a national broadcaster. This feeling was very similar across the different cities, education levels and genders.

![Figure 60: Need for a national, government funded broadcaster (n=3196)](image)
A majority of Libyans demand some (39%) to full control (32%) of the media sector whereas in 2012 only 8% were in favour of state controlled media and 42% demanded some control on the media. The idea of a completely free media sector is also less popular than one year ago, with 26% in favour of uncontrolled media in 2013 against 50% in 2012. Younger Libyans are more likely to express support for a fully controlled media sector, with 39% of teenagers asking for full control compared with typically 30% for older groups. This finding was confirmed during PIs, as several young respondents expressed concerns that the media landscape would worsen in the future in light of the multiplication of ‘unorganized random channels’ and the lack of control of the government.

![Figure 61: Preferences for government control over the media (n=3196)](image)

When asked which topics should not be mentioned in the media, 29% asserted that ‘all topics should be discussed’. ‘Security and internal issues’ ranked first with 15%, followed by ‘rumours’ with 13%. Others smaller categories included topics relating to Shia Muslims, harassment of women, ethnic conflicts and Ghadaffi regime supporters. When asked the same question, PIs participants would often answer that ‘all topics should be discussed but in the proper way’. Research identified several possible understandings of ‘the proper way’, including using correct (formal) language, respecting Libyan traditions, and avoiding emphasizing divisions among Libyans. Female PI respondents in Benghazi said that television channels should control the content of the text messages they put on the screen, to avoid reading ‘bad words’ and ‘uninteresting comments’. To them, being ‘respecting Libyan traditions’ meant not promoting a culture of flirting. Female PI respondents in Tripoli also believed that the increasing use of English words on Libyan television channels was detrimental to the Arabic language.
Figure 62: Topics that should be banned from the media (n=3196)

Rape should not be discussed in media, because of our traditions. It hurts our feelings and there are other places to discuss it.

Naja, 25, student, Benghazi

I don’t allow my daughter to watch MBC TV because even in the cartoons, they have girls and boys flirting and being shy of each other, it has a bad influence. That is why Misrata TV should have its own cartoons.

Amina, 32, housewife, Misrata

We are Muslims, there should be borders for everything and someone in the government should be responsible for that. It will solve the problem of intolerant, racist news and bad words on TV.

Amina 32 housewife Misrata

Media should not discuss rumours, disrespect people, or create fitna between the tribes. It should not over emphasize these conflicts.

Tareq, 22, student, Sabha
9.3 Transparency, Accountability and Ministry of Media Mission

For 82% of Libyans, television channels should be transparent about their funding. This feeling was very similar across the different cities, education levels and genders, showing that Libyans unanimously want to be aware of who is behind the content they are exposed to on television.

Figure 63: Preferences for disclosure of media channel funding (n=3196)

Figure 64: Preferences for regulatory entities to enforce media funding disclosure (n=2608)

Nearly half of Libyans assert that government bodies should be responsible for ensuring that television channels are transparent about their funding. 26% want this role to be given to the Ministry of Media or Culture, and 24% to the Libyan government in general, showing the population is unsure about who is precisely in charge of media the Libyan government. 9% believed that ‘the channels themselves’ should be responsible for ensuring transparency and 3% wanted civil society to fulfil this role.

‘Television channels should supervise themselves!’

Rabia, 33, television employee, Zuwarah
An Assessment of the Media Landscape and Consumption Patterns
SUMMARY OF KEY FINDINGS

Research Scope and Methodology

Historical Background: Libyan Media from the Ghadaffi-era Media to 2013
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Social Media Landscape and Consumption patterns
Print Media Landscape and Consumption patterns
Trust and Distrust Regarding Political Information
Government Role in the Media

Summary of Key Findings

Areas of Opportunity
**10 SUMMARY OF KEY FINDINGS**

The overall objective of the research was to provide an updated assessment of the Libyan media landscape that measures consumption habits, perceptions of trust towards certain outlets, and attitudes towards government involvement in Libyan media.

- The landscape analysis has shown the relative stabilisation of Libyan television channels, radio stations and publications (in terms of number and identity building) two years after the revolution. Within this media landscape, public outlets are most likely to witness substantial changes as the Ministry of Media will start to regulate and re-appropriate government and local council media outlets across the country.
- The media consumption pattern analysis shows that frequently-consumed satellite television and internet are the most important sources of information, and to a lesser extent, radio and publications. Audience and preference analyses highlight the emergence of a series of top outlets within each media category, with important variations across cities, ages and genders that should be kept in mind when designing communication strategies in Libya.
- The analysis of drivers of trust and expectations towards media shows that messages are best understood and communicated when framed in a way that strongly respects Libyan traditions, without divisive content or specific agendas. This points to a future role of the government in ensuring media outlets’ transparency to the Libyan people. Indeed, one of the main findings of this research is the unified call from Libyans for media outlets to be transparent about their funding, and for the Ministry of Media or the government to regulate this.

**10.1 GENERAL CONSUMPTION PATTERNS**

Media consumption has evolved considerably since 2012, especially regarding television consumption patterns. Compared with 2012, Libyan television consumption has increased while international television consumption has decreased. This is most probably due to the progressive development of the television landscape in Libya combined with the absence of any significant coverage of Libya in international television channels since the revolution. Two years after the revolution, Libyans are looking for more analysis of the country’s reconstruction and state-building efforts, and in the process are turning to Libyan television rather than international television.

Post-revolutionary Libyan society is hungry for local news, politics and culture, notably on television. Libyan television channels are expected to fulfil new hopes. Libyans are now actors in the country’s transition and longer term state-building efforts, and are asking for deeper analyses. Libyan television channels should address Libyans’ demands for credible political analyses and provide a better understanding of the situation of the country. Furthermore, the significant demand for local cultural news suggests the political reconstruction of the nation is complemented by the elaboration of national and local identities, especially among youth and marginalized groups.

The dominant media in Libya remains television, with 74% of Libyans reporting using television as their primary source of information. Libyans are highly exposed to satellite television: this media is both the most accessible (99%) and the most frequently consumed (76% daily consumption). Preference for international or Libyan television varies according to age and education. Middle-aged Libyans tend to have a preference for Libyan television, while more educated and younger Libyans express interest in international television. Overall, the peak time for television audience in Libya is between 20:30 and 21:30, where around 15% of the population are tuned in on a typical evening. Female television consumption has a secondary peak in the late afternoon, when women are watching television largely alone.
Libyan radio is still mostly consumed for entertainment, and there is a strong appetite for morning shows and social chat shows, rather than politics. Libya is still deprived of a strong national radio network able to disseminate messages from the government to all parts of the country. Instead, regional radio hubs have emerged, each offering a wide range of tailored programmes for their city. Not all these radio stations are likely to survive in the long run due to financial limitations and lack of support from the government. Yet, some have managed to build a name and a reputation, particularly through ‘morning shows’ that are often the flagship programmes, as well as the most demanded type of program.

40% have access to the internet in Libya, and Facebook dominates Libyan internet consumption. Internet is the third most accessible media in the country (40%), although access rates vary with location. Daily internet usage in Misrata, Zuwarah and Sabha (21%) is notably less than the daily usage in Tripoli (37%). The internet is overwhelmingly used by educated youth but very rarely by older and less-educated Libyans: daily internet usage varies from 50% for Tripoli youth to just 6% for over 50s.

No media sector is as regionally diverse as the publications sector. 11% of Libyans have access to up-to-date newspapers, but no more than 3% of Libyans read newspapers on a daily basis, and a majority of these readers live in the major cities. Newspapers in Tripoli and Benghazi are mostly consumed by mature readers between 40 and 49 years old (44%) and are equally read by men and women. The typical newspaper reader in Misrata has a different profile, and is male (71%) and young (42% aged between 20 and 29), most likely due to the popular and youthful Misrata-based publication Wifaq. Readers in the main cities express a preference for locally published newspapers, showing that Libyans are rarely reading the same newspaper across the country. A majority of Libyans want their local newspapers to feature more local news articles, followed by national news.

Media consumption profiles differ greatly across Libyan cities. As such, communication campaigns could approach each city with different media strategies:

- In Tripoli, people desire more national and international news, as well as more religious programmes on television. It is the city with the best internet access and where most people are likely to have a Facebook account. Regarding radio programme preferences, Tripoli seems to desire less local news compared to other cities, which may result from the fact Tripoli is already prominent in national news.
- In Misrata, people would like to hear local news on television and on the radio. In terms of publications, people would like newspapers to provide martyr and revolution articles more than in other cities. This is probably related to the role played by the city during the revolution and its reputation as ‘the city with the most martyrs’. Only 21% of the population are online daily compared to 37% in Tripoli.
- In Benghazi, local news, political analysis and debates are strongly desired in all types of media. Political analysis is more strongly desired in publications compared with other cities, reflecting the desire of the Benghazi population to understand different governance systems in the context of the ‘Centralism versus Federalism’ debate.
- Sabha and Zuwarah have similar media consumption patterns, and both ethnically diverse cities desire more cultural programmes and local and international news. Political debates are less popular than in other cities, reflecting a desire to avoid ‘fitna’ (division) between ethnic groups coexisting in the city. Newspapers are more difficult to find in Sabha than in the other cities surveyed, likely due to the limitations of the distribution networks used by the large newspapers.
10.2 Outlet preferences and Trust

The government channel Libya Al Wataniyah is the most popular Libyan television channel. Al Wataniyah gained 56% of expressed preferences among Libyans in April 2013, compared with 7% in April 2012. This is probably due to its progressive professionalisation after a series of trainings by international organisations, including BBC Media Action and Internews. The national channel is followed by the trio Libya Al Ahrar, Al Aseemah and Libya Al Hurrah, which each score around 40% of expressed preference.

The absence of a national radio network prevents a national-level radio analysis. BBC Arabic is the preferred international radio station, although no more than 1% of the population declares listening to international radio. In Tripoli, youth have a preference for the government music station Shababiyah FM, while middle aged Tripolitanians are more likely to tune into Lebda FM and Radiozone, especially to listen to their morning shows. Residents of Benghazi, Misrata, and Zuwarah listen to the channel of their local council or to local private channels offering a balanced mix of music, local news and social chat shows. In Sabha, the repeat of Al Wataniyah remains the most popular radio.

Febrayr and Qureyna Al Jadeeda are two dominant newspapers and are available in most Libyan cities. Since 2012, several popular newspapers such as Orus Al Bahar have closed due to financial difficulties, leaving the sector dominated by Febrayr and Qureyna Al Jadeeda. Yet, underlying preferences for regional and local newspapers can be seen. Fezzan is the most popular newspaper in Sabha and provides cultural articles about Libya’s southern regions, and Wifaq is very popular in Misrata.

Facebook and YouTube are the two preferred international websites in Libya. Slightly more than a quarter of the overall Libyan population is registered on Facebook, with males and youth having a slightly better access to the social network. Once browsing Facebook, Libyans interact with each other, look for events to attend in their city, and look to inform themselves. Socially, Facebook is a place where social barriers tend to vanish and where men and women can interact freely and learn to know each other. Politically, Facebook is a place where ideas are discussed very freely and without taboos, contrarily to other media. Some Facebook pages testify of the emergence of a strong Libyan national identity while others demonstrate the rise of distinct regional identities.

Libyans trust most national television as well as their family and friends. If a serious event were to happen in Libya, 68% of Libyans would seek information on national television and no less than 37% would also need to verify with their ‘family and friends’. This reflects a complementarity between modern means of communication and more traditional social frameworks such as the family and the wider community. Among various television channels, the national broadcaster Al Wataniyah is the most trusted, probably due to its perceived neutrality in the current context of increased politicization of the media landscape. Despite its popularity, Facebook is not seen as a reliable source of political information and news. Just 5% of the sample declared trusting the political information they read on the social network, against 41% distrusting this source of information.

Libyans’ trust in media content is driven by three interrelated factors. These have been identified as increased visibility of the information, confidence in the informant and the ability to triangulate the information with other sources. First, visualisation matters, and Libyans are eager to see strong pieces of evidence, such as pictures or video clips, proving that the information is not another rumour. Second, integrity and neutrality of the ‘informant’ are key for media content to sound credible to a Libyan audience, especially at a time when Libyan outlets are increasingly accused of promoting certain agendas. Finally, Libyans will be more likely to trust news on
Facebook, or possibly any other media, after hearing the same news in the street or in a conversation at a coffee shop, showing again the importance of social reinforcement and triangulation through a variety of sources of information.

10.3 Government Role in the Media

Since 2012, the Government has gained influence in the Libyan media landscape, notably due to the rise of the main national broadcaster Al Wataniyah. At the same time there has been a decrease in reliance on international channels for information, Al Wataniyah has become the preferred Libyan channel. Despite the security challenges it faces, the national broadcaster seems to have a bright future ahead. The channel’s technical teams have managed to take advantage of the material learned through different training sessions, and the channel is starting to provide Libyans with the national news and political analysis they are eager for. Yet, the government should expect to be challenged by regional television channels such as Misrata TV or Al Hurra, which are extremely popular in certain cities.

In radio, the government-funded music-only radio Shababiyah FM is very popular in Tripoli. The majority of Tripoli’s youth tunes into this government channel, meaning it could have an extremely influential position in the future. Nationally, the government’s influence in radio depends on its ability to negotiate and cooperate with different local councils’ radio outlets.

Libyans are eager for the government to exercise more control over media outlets. Libyans are united in their desire for accountability and financial transparency, and a majority believe that government bodies should be responsible for ensuring accountability. Interpretations of the government’s role vary. Greater control can often be interpreted as a popular desire for media outlets to present information ‘in the proper way’, i.e., using formal Arabic language, not offending Libyan traditions, and avoiding decisive topics that could lead to societal divisions. This represents an area[ of opportunity for the government to impose rules and regulations on the existing Libyan media discourse.

10.4 Summary of Media Consumption

The diagrams below summarize the preferred media outlets by city and the consumption profiles of three main Libyan groups.

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Figure 65: Preferred media outlets and most demanded content by city

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22 The headquarters and studios of Libya Al Wataniyah were surrounded by militia groups in April 2013
**Figure 66: Consumption profiles of three Libyan groups**

<table>
<thead>
<tr>
<th>Group</th>
<th>Preferred Media</th>
<th>Peak Time</th>
<th>Strong Access</th>
<th>Weak Access</th>
<th>Preferred Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>YOUTH</td>
<td>Libyan Television</td>
<td>19:30-21:30</td>
<td>Internet, Facebook, and Youtube</td>
<td>Newspapers</td>
<td>Local news, Sport</td>
</tr>
<tr>
<td>WOMEN</td>
<td>Libyan Television</td>
<td>16:30–18:00</td>
<td>Television and Radio</td>
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<td>Local news, Drama</td>
</tr>
</tbody>
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AREAS OF OPPORTUNITY

Research Scope and Methodology

Historical Background: Libyan Media from the Ghaddafi-era Media to 2013

Access to Media, Frequency of Use and Main Sources of Information

Television Landscape and Consumption Patterns

Radio Landscape and Consumption Patterns

Social Media Landscape and Consumption Patterns

Print Media Landscape and Consumption Patterns

Trust and Distrust Regarding Political Information

Government Role in the Media

Summary of Key Findings

Areas of Opportunity
11 Areas of Opportunity

The Libyan media sector has great potential to bolster Libya’s democratic transition by providing reliable, balanced and timely information to the population, and by informing and educating the Libyan population about the broader political process. International donors have an opportunity to support the development of the Libyan media sector by facilitating training, helping to create dynamic programming, and encouraging the right regulatory environment.

Below are suggested areas of opportunity based on findings from this study, which can be further explored by Libyan media managers, policy makers and international donors.

11.1 For the Libyan Government

- **Develop regulatory frameworks.** The Government and the Ministry of Media should develop a strong regulatory framework for Libyan media. A fully functioning legislative framework should include mandatory registration of any media outlets, obligation to declare funding sources, as well as protection laws for journalists and media personnel and anti-defamation laws.

- **Rebuild the national radio broadcaster.** The Government should consider rebuilding a network of FM radio transmitters in order to connect the secondary cities and regions with Tripoli and to ensure they are not excluded from the political debate. As a start, state-supported stations could be encouraged to share content with Al Wataniyah FM and to broadcast important Al Wataniyah FM programs.

- **Provide more support to smaller state-owned outlets.** The Government has an opportunity to address the shortage of human and financial resources that greatly affect smaller state-owned outlets. This could take the form of the Government investing in media infrastructure and equipment rather than only supporting media outlets through the payment of the staff salaries.

11.2 For the International Community

- **Develop management skills to promote sustainability.** There is a need to develop management skills in some government and private outlets that could help them to survive in the medium-term. Such skills include strategic planning, developing commercialisation and advertising strategies, time management and human resources training programmes. Al Wataniyah TV is a prime example, as its management structure is directly inherited from the previous regime and relies on the former staff and managerial structures. Similarly, the GNC Media Office has expressed a keen interest in receiving support to improve its internal communication in order to increase its efficiency and communicate more systematically to the Libyan people.

- **Continue to support journalist training.** There is a still a need for further journalistic training programmes. Journalists and presenters need to improve their reporting, editing and presenting skills as well as their overall ‘professionalism’ if they want to gain the trust of their audiences. The lack of trained personnel is hampering development of existing outlets (like Dawliyah TV and Radiozone), and is also a barrier for new media outlets to enter the sector.

- **Support technical skills development concurrently with journalist training.** Technical skills also need to be developed so that Libyan media outlets can survive autonomously, without having to rely on international support. For instance, the private Benghazi-based radio station Radio Shabaab Libya commented that they received a lot of journalistic training but not enough technical training, such as how to use mixing tables and other studio equipment. These courses may best be provided in the longer-term by supporting University Media Departments.
11.3 FOR MEDIA MANAGERS AND PROFESSIONALS

- **Develop tools to assess the position of media outlets on the market.** Indicators such as audience ratings should support media managers in their self-assessment and in the evaluation of their strengths and weaknesses in terms of programs as well as to ensure that advertising markets are aligned on audience rates.

- **Remain independent and professional** (see graph below, left bloc ‘Media Outlet’). Overall, Libyan media managers should remain transparent and independent from ‘agendas’ and ‘rumours’ if they want to gain the trust of Libyan audiences in the long run. As strong claims for transparency and control showed, Libyans are very sensible to the perceived neutrality and professionalism of the media outlets they consume.

- **Get closer to Libyan audiences** (see graph below, right bloc ‘Target Audience’). As Libyan media is entering a maturation phase, Libyan audiences are becoming more sophisticated. Media managers and journalists should provide the right target groups with information that can appropriately answer their need for political information illuminating the state-building process on the one hand, and cultural information giving them the material to elaborate their identity at a time of transition on the other.

*Figure 67: Libyan media sector optimisation framework*
11.4 Perspectives

The evolution of Libyan media is reflective of broader changes within the Libyan society. Three aspects are worth mentioning:

- **Growing politicization of Libyan media.** Contrary to one year ago, Libyan media outlets, and especially television channels, are spontaneously associated to political parties in the Libyan media discourse. This not only points at the fragmentation of the political landscape two years after the revolution but also clearly indicates that political parties have understood the need to invest in mass media to gain the backing of Libyan public opinion. Conservative and liberal political movements are likely to keep taking advantage of the liberalization of the media landscape to influence Libyan audiences that are thirsty for comparing and contrasting different media discourses after 42 years of propaganda.

- **Stronger demands for state control and media regulations.** Libyans express a strong demand for the government to regulate this liberalised media scene. Libyan audiences have realised that freedom without legal frameworks is likely to lead to chaos. The clear call for the state to enforce television channels’ transparency shows the Libyan government is expected to play an active role in the media field. Going further, Libyans’ robust endorsement of the national broadcaster *Libya Al Wataniyah* is both an example of Libyans’ quest for increased nation-building efforts as well as a reaction to the politicization of private television channels.

- **Increasing social experimentation on social media.** In this transitional context, Libyan youth show a huge appetite for expressing themselves as well as for exploring new modes of communications. This generation does not hesitate to show strategic usages of social networks to bypass societal codes and develop their own networks of informants around the country to shape their opinions in complement of mainstream media. The use of online ‘masks’ on Facebook exemplifies young Libyans’ attempts to circumvent social control on their behaviours, play with norms and satisfy their desires for interaction by any means possible.
**BIBLIOGRAPHY**

IMS. *Media in North-eastern Libya*. IMS, 2011.


Libyan Media Wiki, Legatum Institute http://en.libyamediawiki.com

**LIST OF KEY INFORMANT INTERVIEWS**

- The Ministry of Culture
- The GNC Media Office
- The Prime Minister’s Office Communication Department
- Tripoli University Media Department
- The Misrata Media College
- Benghazi City Council
- Sabha City Council
- The Free Media Center in Tripoli
- BBC Media Action, IWPR, IMS, CFI, and RSF international media support groups
- Shout production group
- Government television channels: *Qanat Libya Al Rasmiyah, Libya Al Wataniyah*
- Private television stations: *Libya Al Hurra, Libya Al Ahrar, Al Aseemah, Al Dawliyah, Misrata TV, Benghazi Broadcasting Network, Benghazi TV and Fezzan TV*
- Newspapers: *Libiya, Roya, Febrayr, Qureyna Al Jadeeda, Wifaq and Fezzania.*