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# Building a vibrant news industry in the Middle East and North Africa

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# EXECUTIVE SUMMARY

Digitization is fueling growth for news organizations in the Middle East and North Africa (MENA) region, presenting both opportunities and challenges that must be addressed.

The news market in the region is promising. News consumption and demand are on the rise. MENA region consumers are willing to pay for the news they want, particularly trustworthy, in-depth, and specialized reporting. Additionally, there is significant room for revenue growth, especially in digital advertising and consumer revenues (digital circulation).

The growth is fueled by widespread mobile connectivity, high internet penetration, and social media usage in the MENA region, especially young consumers leading digital lifestyles. To attract and grow revenue from these tech-savvy consumers, news organizations need to transform their business models and methods of delivering content. That transformation must include creating new types of content, formats, and interfaces. Collaboration with governments in the MENA region, regulators, global tech platforms, advertisers, and academia is crucial in creating an enabling environment that supports the growth of regional news organizations. This environment can be achieved through talent development programs, targeted financial support, media literacy initiatives for consumers, and an updated regulatory framework.

Together these transformational efforts can lead to a better news consumption experience, high-performing news organizations, and an overall vibrant news ecosystem in the MENA region.

# THE RISE OF DIGITAL NEWS MEDIA IN THE MENA REGION

In line with global trends, digitization has disrupted the news industry in the Middle East and North Africa (MENA) region. We undertook an in-depth study (see “The MENA region news industry landscape study”) that revealed how digitization has altered consumers’ news preferences, challenged business models and monetization of news organizations, and exposed shortfalls in those organizations’ skills and capabilities. It also shed light on shortcomings within the enabling environment of the news industry in the region (see *Exhibit 1*).

## EXHIBIT 1

The Middle East and North Africa news industry faces challenges in three areas



<sup>1</sup> YouGov survey results.  
Source: Strategy&, YouGov survey results

## THE MENA REGION NEWS INDUSTRY LANDSCAPE STUDY

Our analysis of the news industry in the MENA region focused on Egypt, Saudi Arabia, and the United Arab Emirates (UAE). These are the three largest news markets in the region and account for 80 percent of the advertising spending in the region's entertainment and media industry.

The study was conducted in 2022 and was based on inputs from several sources:

- Interviews with news organizations from the three markets and industry experts.
- Consumer surveys in partnership with YouGov totaling 4,500 consumers across Egypt, Saudi Arabia, and the UAE (see Appendix: Survey Methodology).
- Global benchmarks and market reports. We used these sources to analyze the news media landscape in each of the three markets in terms of consumer demand, news supply, and the industry's enabling environment.

In terms of assessments:

- The consumer demand assessment was based on the results of the YouGov surveys and included channel, format, and device preferences; consumption patterns and habits; willingness to pay; and satisfaction with journalistic output.
- The news supply assessment included the industry landscape, business models and monetization, organizational capabilities, and partnerships with global tech platforms.
- The assessment of the industry's enabling environment included the review of government policies and regulations, talent development initiatives, funding and subsidies, tech infrastructure, innovation, market data and reports, and media literacy.

### **Consumer preferences shifting to short format, video, and social**

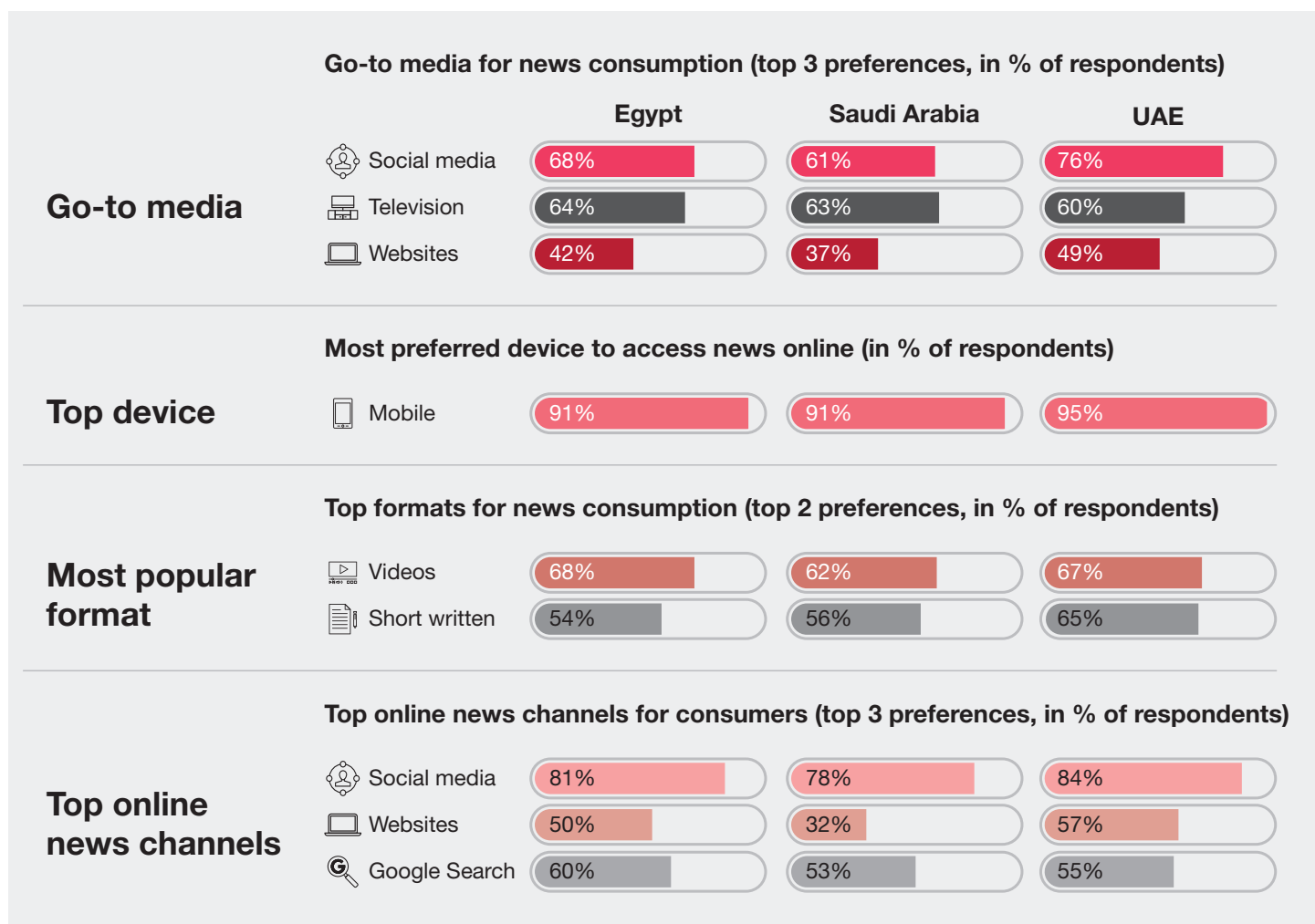
The preferred news channels, formats, and categories, as well as the behaviors and satisfaction levels of news consumers in the MENA region, have undergone significant changes because of digitization.

Digital news has replaced print across the region. In our survey of 4,500 consumers in the region's three key markets, 68 percent of the respondents stated that social media was their primary source for news. Over 90 percent of them identified mobile as their top device for accessing news. In terms of news formats, 66 percent of respondents named mobile video as their favorite. Short-form articles were also popular, enjoyed by 58 percent of respondents (see *Exhibit 2, page 4*).

In terms of consumer satisfaction, 62 percent of respondents indicated they were "very" or "somewhat" satisfied with the range of opinions represented in the news they received. However, they do not trust the news they consume. Only 12 percent of the respondents indicated that they "rarely" or "never" felt the need to verify news.



**EXHIBIT 2**  
**MENA news consumers' preferences**



Source: YouGov survey results on news consumption preferences (2022)

## Outdated business models and capability gaps

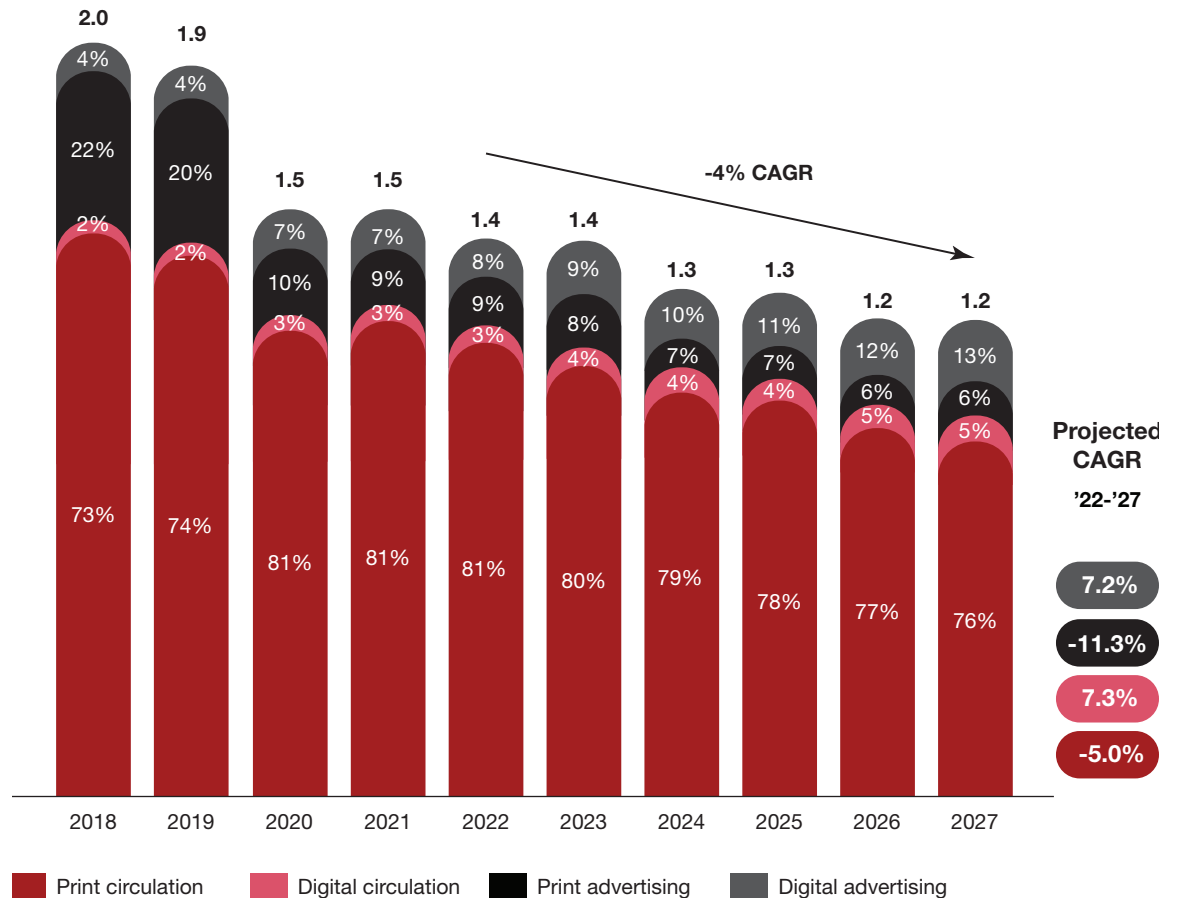
News organizations have outmoded business models, which prevent monetization and lead to limited growth prospects. They also have shortfalls of digital capabilities and there are limited partnerships with global tech companies of the kind that could maximize value-add.

### Traditional news business models are limiting growth prospects

The shifts in news consumption have created a major financial challenge for traditional news organizations. Other than traditional television, newspaper and magazine publishing is the sole segment of the global entertainment and media industry that is forecast to suffer a decline in revenue between 2022 and 2027. During those five years, global newspaper and magazine revenues are forecast to drop by a compound annual growth rate (CAGR) of 2.0 percent. The outlook for the news industry in the MENA region is lagging behind the global average, with a forecast revenue decline of 4 percent CAGR (see *Exhibit 3*).

**EXHIBIT 3****MENA region newspaper and magazine revenues are dropping**

MENA region newspaper and magazine revenues (US\$ billions, 2018–2027)



Note: MENA = Middle East and North Africa. Print and digital circulation represent consumer revenues. Numbers for 2023 through 2027 are PwC forecasts. Totals may not sum due to rounding.

Source: PwC Global Entertainment & Media Outlook 2023-2027, [www.pwc.com/outlook](http://www.pwc.com/outlook)

While the digital advertising and consumer revenues (digital circulation) of news organizations have been growing, they are not increasing fast enough to offset the drop in print advertising and circulation. Over the past few years, news organizations have experienced a decrease in advertising revenue primarily due to the loss of classified ad revenues, which have been captured by pure online players. Moreover, interviews with industry players revealed greater competition for ad budgets, namely from the growing share of ads on global tech platforms and social influencer accounts. Other contributors to the industry's declining revenues include lower costs per thousand impressions (CPM),<sup>1</sup> higher programmatic cost, and reductions in government spending on news ads and subscriptions.

The MENA region's news industry also faces a challenging revenue outlook due to the difficulties associated with digital transformation, business model innovation, and revenue diversification. Although the news media ecosystem is increasingly digital, many companies are still constrained by a print-oriented mindset. That is evident in their fragmented newsroom operations and reliance on conventional content formats and delivery channels. Although innovation in their business models has been limited, some regional news organizations have started to diversify their revenue streams. Several organizations, including Al Arabiya, *Arabian Business*, *Gulf News*, Mada Masr, SRMG, and *The National*, are exploring sustainable business models and building avenues for growth. These steps include developing new content products such as digital platforms, podcasts, videos, and research reports, as well as launching other businesses, such as media training and events. Additionally, some of these organizations are adopting paywalls for subscription models and membership programs.

### **Limited capabilities and partnerships are hampering transformation**

Interviews with regional news executives, along with field observations and research, highlighted a shortfall of in-house digital and editorial capabilities and a limited use of global tech firms' services.

There are two shortages of digital capabilities in the region's news industry. First, some organizations lack the digital content production capabilities needed to shift to formats that match the preferences of MENA region consumers. These production capabilities include podcasts, short-form video and written content, mobile formatting, and influencer marketing. Second, there has been limited investment in the data capture and analytical tools and capabilities needed to maximize content value. Data analytics capabilities allow news publishers to unlock new avenues of growth by improving ad and content targeting, enhancing recommendations, increasing content efficiency, developing and retaining audiences, automating reporting, and optimizing headlines.

Furthermore, news media companies in the MENA region find it difficult to field the talent needed to deliver high-quality news. Although detailed data is limited, interviews with industry players clearly indicate there is a shortage of quality journalists in the region. According to interviews with multiple stakeholders in the industry, it is also difficult to retain news talent in the MENA region given the opportunities available in adjacent sectors, such as marketing, PR, and communications, and in government.

Also, the region's news organizations do not fully exploit tools and products offered by global tech platforms to maximize added value. They are finding it difficult to grow their audiences, strengthen and monetize content, and enhance security and privacy because of limited partnerships with global tech platforms. Although some efforts are underway, strategic collaborations are still in their early stages, and more efforts are needed to encourage the transformation of news organizations.



## More effective enabling environment required

Different stakeholders from within the news media ecosystem (such as regulators, academia, tech platforms, news players, and others) typically drive various initiatives to ensure an effective enabling environment for the news industry to grow and thrive (see *Exhibit 4*). Our interviews with industry executives and regulators reveal several concerns and challenges in the existing enabling environment in the MENA region.

### News market data and reports

Particularly striking is the scarcity in the region of credible news industry data, market research, and reports. The region lacks information on news consumption and preferences, trust in news, news industry-specific economic indicators, advertising and consumer revenues, and financials. Global research and reports from well-known organizations such as the Reuters Institute for the Study of Journalism at the University of Oxford and the Pew Research Center do not cover the MENA region.

This lack of industry-wide data makes it difficult for journalists, editors, and publishers to fully comprehend the changes happening in the industry, understand the challenges journalism faces, and build stronger and more resilient news organizations. It also makes it difficult for governments and other stakeholders to fully understand the region's changing news landscape and design the policy actions and initiatives necessary to support the news industry.

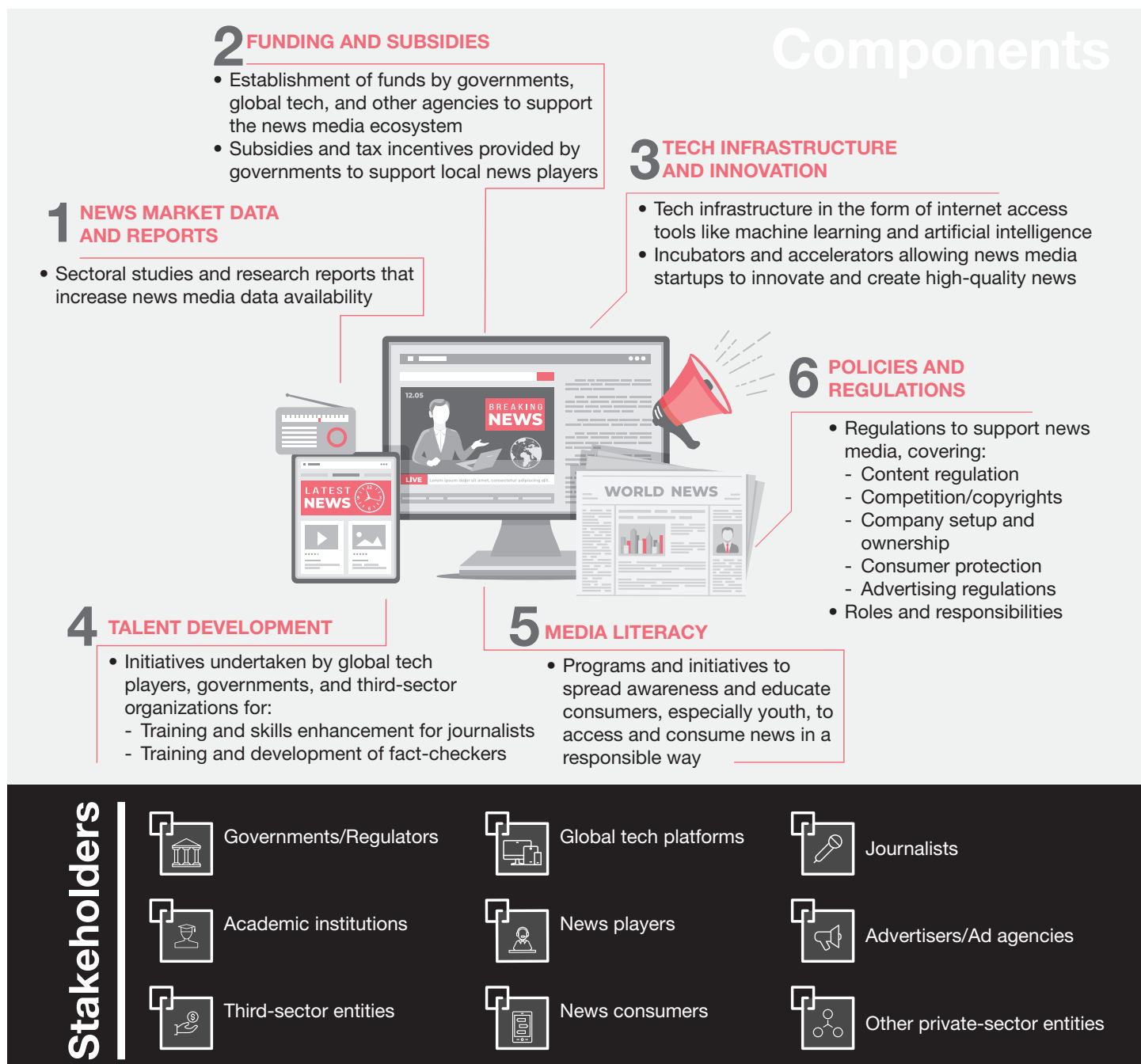
### Funding and subsidies

In the MENA region, public and private stakeholders, including governments and global tech platforms, are offering various forms of assistance to news organizations. Governments in the MENA region, such as Egypt, offer subsidies and tax exemptions, which are crucial for the financial sustainability of newspapers in those countries.<sup>2</sup> However, problems may arise if this financial support lacks clear objectives for holding recipients accountable or if it infringes upon journalistic independence.

Other players, including global tech platforms, are also playing a role by offering support in the form of ad revenue sharing, innovation programs, funding, and tools. For instance, programs such as the Google News Initiative designed to support and fund digital projects can help news organizations transform and expand their reach to broader audiences. Similarly, tools like Google Ad Manager help publishers sell and manage their digital advertising inventory to maximize their ad revenue.

## EXHIBIT 4

### The enabling environment of the news industry



Source: Strategy&

### Tech infrastructure and innovation

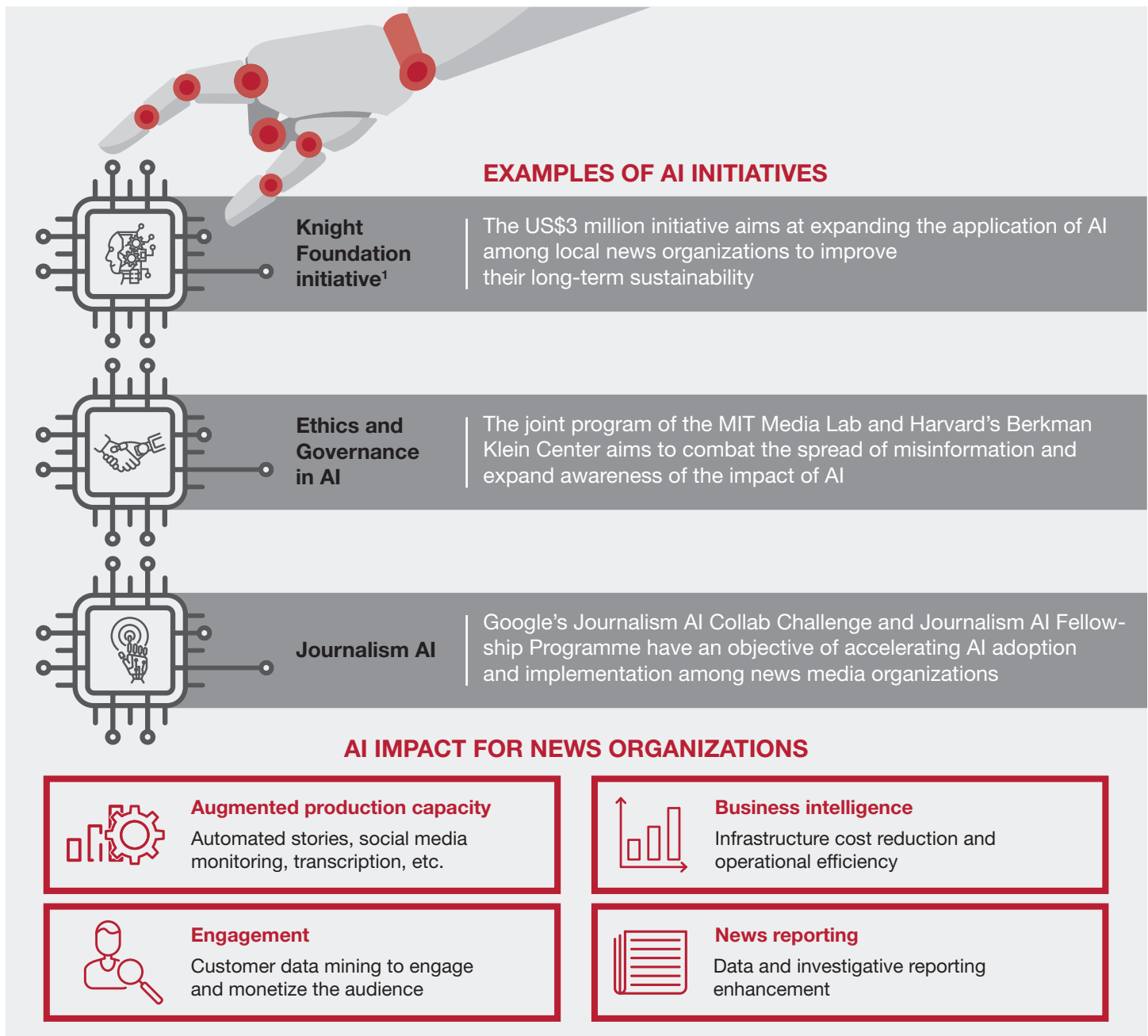
News organizations in the region have not been supported enough to exploit the latest innovations and revamp their tech infrastructure. Further support is needed to enhance capabilities and invest in the infrastructure required for introducing new technologies,

including artificial intelligence (AI). AI adoption could help news organizations increase efficiencies and production capacity as well as improve news reporting, audience engagement, and monetization (see *Exhibit 5*).

There is also a need to expand the availability of incubators and accelerators that foster innovation and provide the necessary support for news startups and emerging technologies to thrive.

#### EXHIBIT 5

### Supporting tech infrastructure upgrades with AI can empower news organizations



<sup>1</sup> The Knight Foundation is an American nonprofit foundation that provides grants for journalism, communities, and the arts.  
Source: Knight Foundation report, Google News Initiative website, Strategy& analysis

Talent development

Public and private stakeholders have created educational initiatives to develop talent and improve skills within the MENA region news media industry (see Exhibit 6). These efforts are valuable, but there is a need for more initiatives to continually build the necessary capabilities across skill sets crucial for high-quality journalism. That includes areas such as analytics, digital skills, storytelling, research and visualization, fact-checking, and training on sustainable business models.

EXHIBIT 6  
Journalism initiatives are few in number, but are an important start

Journalist training initiatives			Fact-checking initiatives	
Stakeholders	International Center for Journalists, Facebook	Google	Reuters	Meta Journalism Project, Arab Reporters for Investigative Journalism, Arab Fact-Checkers Network
Overview	<ul style="list-style-type: none"><li>Joint training program focused on ethical reporting practices for journalists in the Arab world, targeting Arab journalists and media managers from traditional and digital-first outlets across the region</li></ul>	<ul style="list-style-type: none"><li>Has trained over 15,000 journalists between 2015 and 2023</li><li>Supports transformation of news organizations with digital growth programs (in partnership with Financial Times Strategies)</li><li>Helps newsrooms and business teams build digital skills (in partnership with Upskill Digital)</li><li>Supports and educates early-stage news startups about building operational and financial sustainability</li></ul>	<ul style="list-style-type: none"><li>Launched a nine-month program of formal and on-the-job journalism training targeting recent graduates, early career reporters, and career switchers</li></ul>	<ul style="list-style-type: none"><li>Created the “Edit and Verify” project to fight misinformation in the MENA region</li><li>Presented the “Advanced Research and Google Tools” workshop to about 50 participants training on fact-checking</li></ul>

Note: MENA = Middle East and North Africa.  
Source: Strategy& analysis

Media literacy

Media literacy initiatives play a vital role in fostering a healthy news industry by educating news consumers and empowering them to identify false and misleading information. In the MENA region, the availability of such initiatives is limited. This presents a unique opportunity to support news consumers, especially younger generations, in effectively discerning reliable and credible information, thereby promoting a more informed society.

Policies and regulations

The regulatory landscape for news in the MENA region is a crucial aspect of creating an enabling environment. Currently, local and regional news organizations may be subject to stringent regulations. In addition, some have insufficient clarity regarding content and digital advertising regulations, which can lead to risk aversion and self-censorship among news organizations. To foster a thriving news industry, it is important to establish smart, balanced policies and regulations that are fit for the digital age.

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# OPPORTUNITIES FOR NEWS MEDIA PLAYERS

Despite the challenges faced by news organizations, the disruptions occurring in the news market offer valuable opportunities.

## **Consumer demand for news is strong**

Although the news preferences of regional consumers have shifted from print to digital, the underlying demand for news is still strong. The foundational elements of this demand are high levels of mobile connectivity, internet penetration, and social media presence, all of which exceed average global levels in the key news media markets of Egypt, Saudi Arabia, and the UAE. Consumers in these markets also exhibit high daily usage across various media channels compared with consumers globally (see *Exhibit 7*). These factors indicate a significant and active consumer base eager for news content in the region.

“ Consumers in these markets exhibit high daily usage across various media channels compared with consumers globally. These factors indicate a significant and active consumer base eager for news content in the region.

EXHIBIT 7  
Consumers in Egypt, Saudi Arabia, and the UAE have high levels of daily media usage

Daily household media consumption (hours and minutes, 2021)



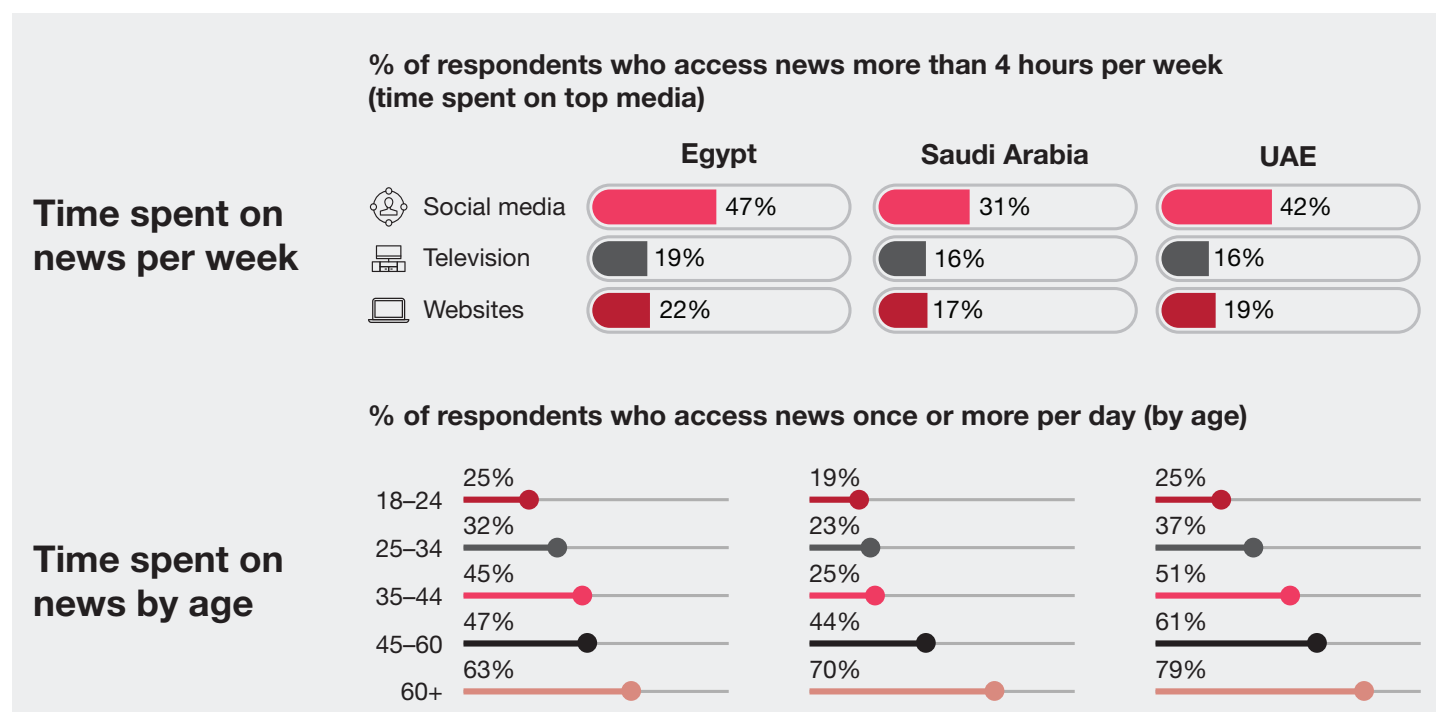
Note: UAE = United Arab Emirates.  
Source: Hootsuite Digital Reports for Egypt, Saudi Arabia, and the United Arab Emirates (2022); Global Media Insight UAE Internet Statistics



Overall, 61 percent of survey respondents indicated they had increased their news consumption in the past three years. However, the frequency of news consumption varies widely by age (see *Exhibit 8*). Most consumers older than 45 in the three key news markets access news every day. Younger consumers, especially those between 18 and 24, access news less frequently. These consumers constitute a large and mostly untapped audience because the MENA region has one of the youngest populations globally; 54 percent of its residents are under age 30.<sup>3</sup> The digital lifestyles of these younger consumers offer a significant growth opportunity for news media organizations that can effectively capture their attention and engagement.

#### EXHIBIT 8

Consumers age 45+ usually access news daily; younger consumers represent a large, untapped market

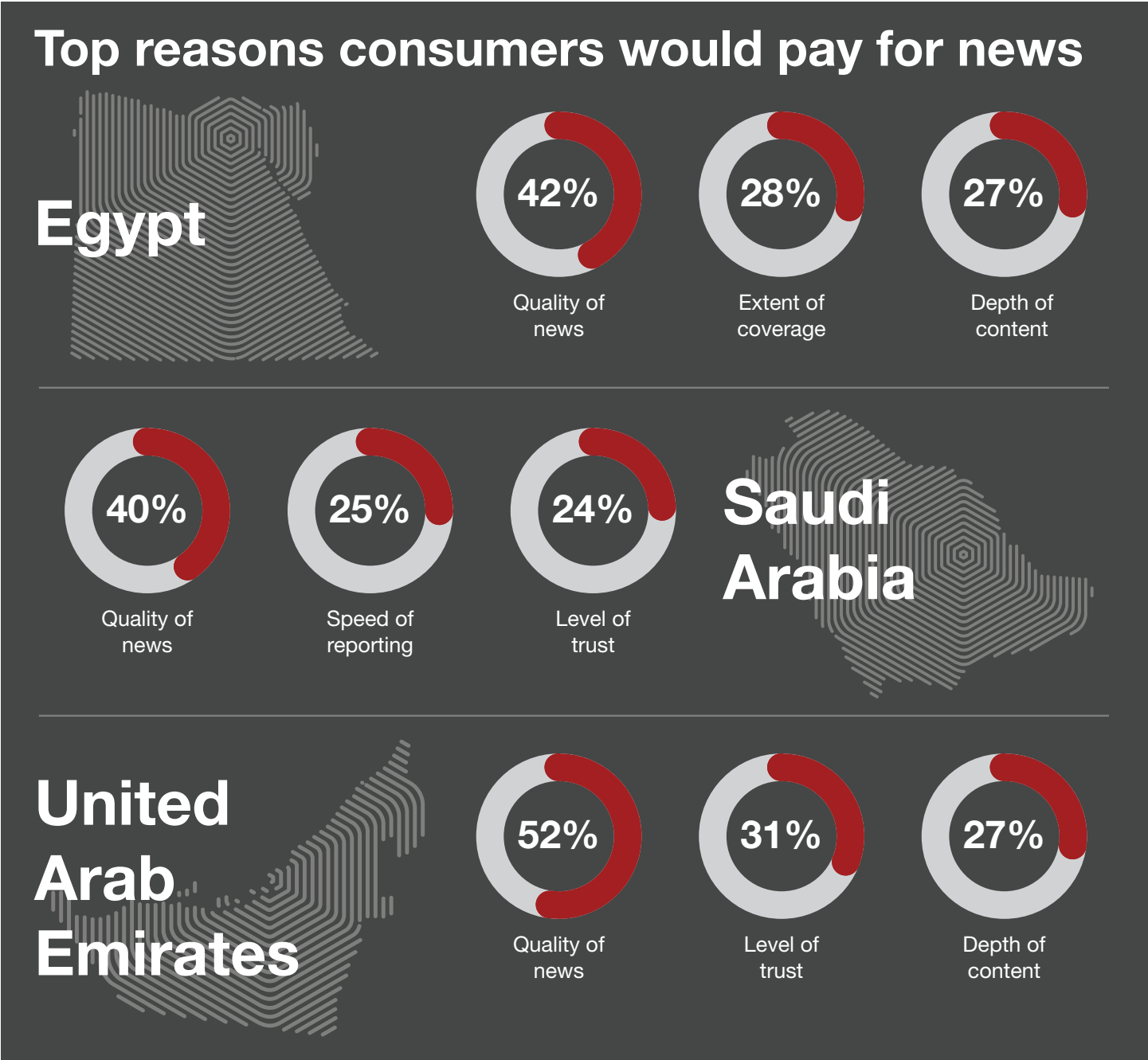


Source: YouGov survey results on news consumption preferences (2022)

**MENA region consumers are willing to pay for high-quality news**

In the YouGov survey, 45 percent of respondents indicated their willingness to pay for high-quality reporting, particularly in such popular categories as entertainment, health, and sports. The respondents are willing to pay for journalism that demonstrates depth and reach, content they can trust, and timely coverage (see *Exhibit 9*). Conversely, they are unwilling to pay for generic news reporting that can be easily found and accessed free.

**EXHIBIT 9**  
**MENA consumers will pay for the news they want**



Source: YouGov survey results on news consumption preferences (2022)

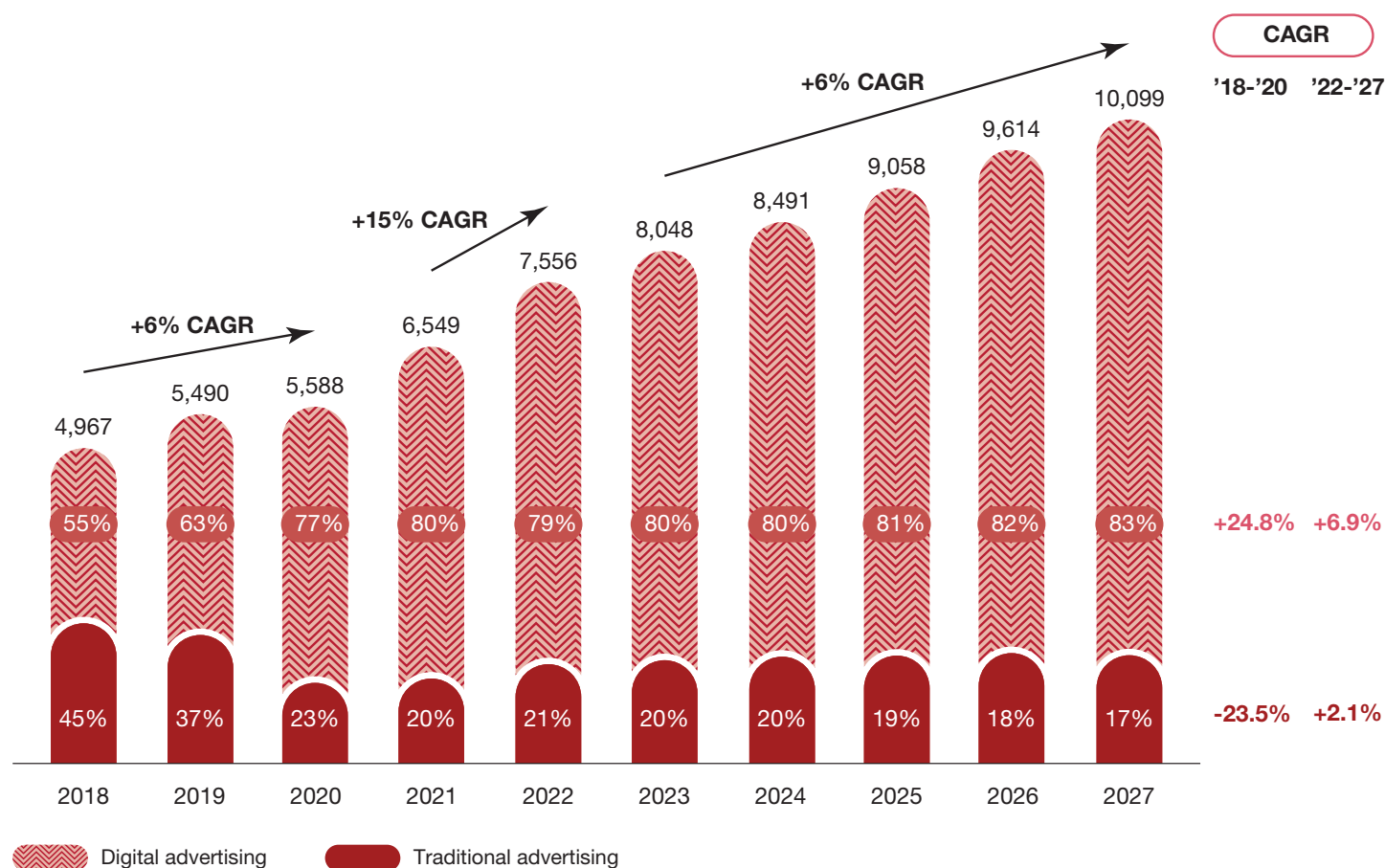
### Ad spending has significant room for growth

According to the PwC “Global Entertainment and Media Outlook,” advertising revenues in the MENA region are expected to grow at a CAGR of 6 percent between 2022 and 2027 — compared with 4.5 percent globally. Digital advertising spending in the MENA region accounts for 79 percent of the \$7.6 billion total ad spend in 2022, and it is expected to outstrip global growth by 2027, with a 6.9 percent rise, compared with 6.5 percent globally. Moreover, although the share of traditional advertising is declining, advertising revenues are still growing in absolute terms, with an anticipated 2.1 percent growth in the MENA region, compared with 0.3 percent globally (see *Exhibit 10*).

#### EXHIBIT 10

#### Advertising in the MENA region is growing, with MENA digital advertising outstripping global growth

MENA entertainment and media advertising revenues and growth (in US\$ millions, 2018–27)

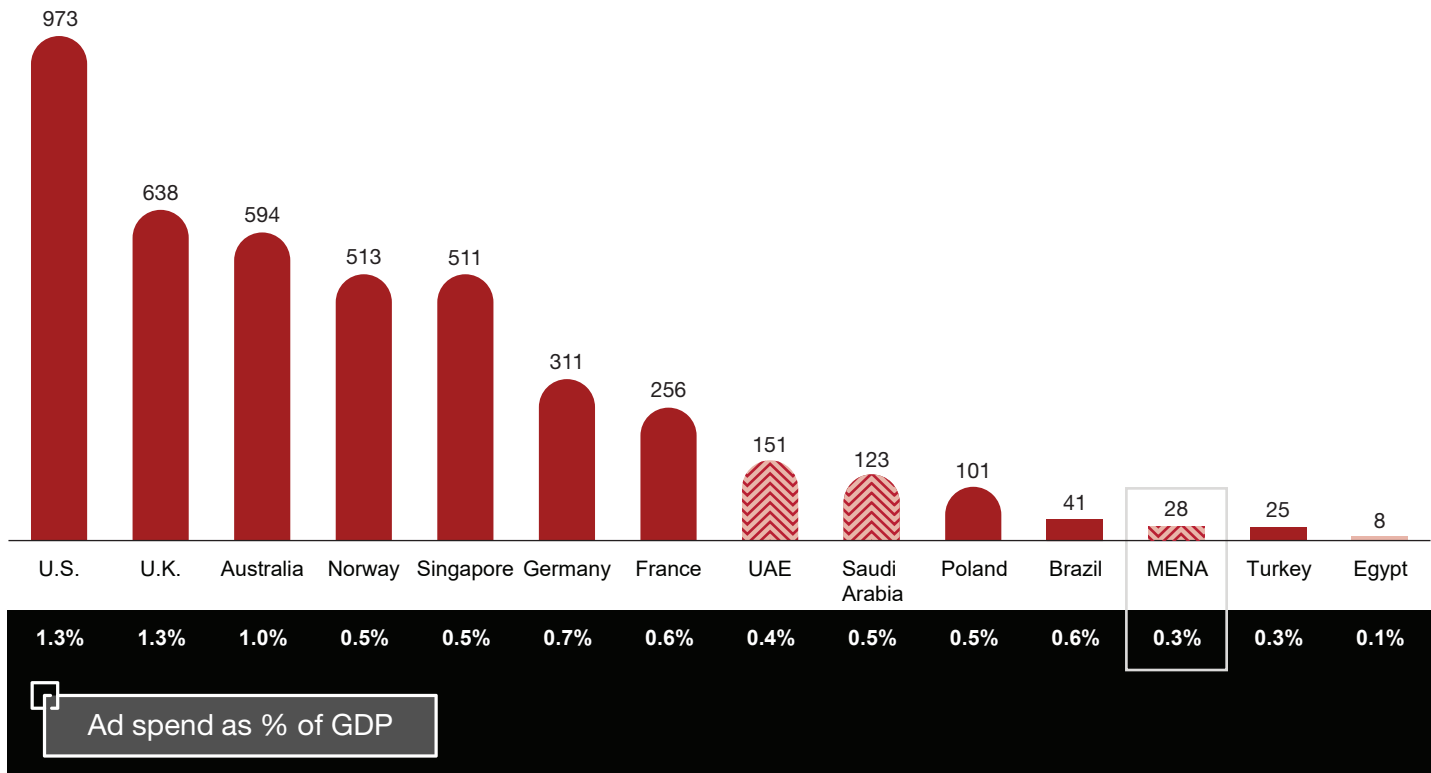


Note: MENA = Middle East and North Africa, which here means Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. Numbers for 2023 through 2027 are PwC forecasts. CAGR = compound annual growth rate.  
Source: PwC Global Entertainment & Media Outlook 2023-2027, [www.pwc.com/outlook](http://www.pwc.com/outlook)

However, it is worth noting that ad spending per capita in the region is much lower than it is in developed economies, which presents significant potential for revenue growth. Although news organizations may not capture all this growth, securing a portion of it can help offset the overall declines in the MENA region’s news revenues (see *Exhibit 11*).

**EXHIBIT 11**  
**MENA region advertising spend per capita is low compared with that of other countries**

Advertising spend per capita, by country (in US\$, 2022)



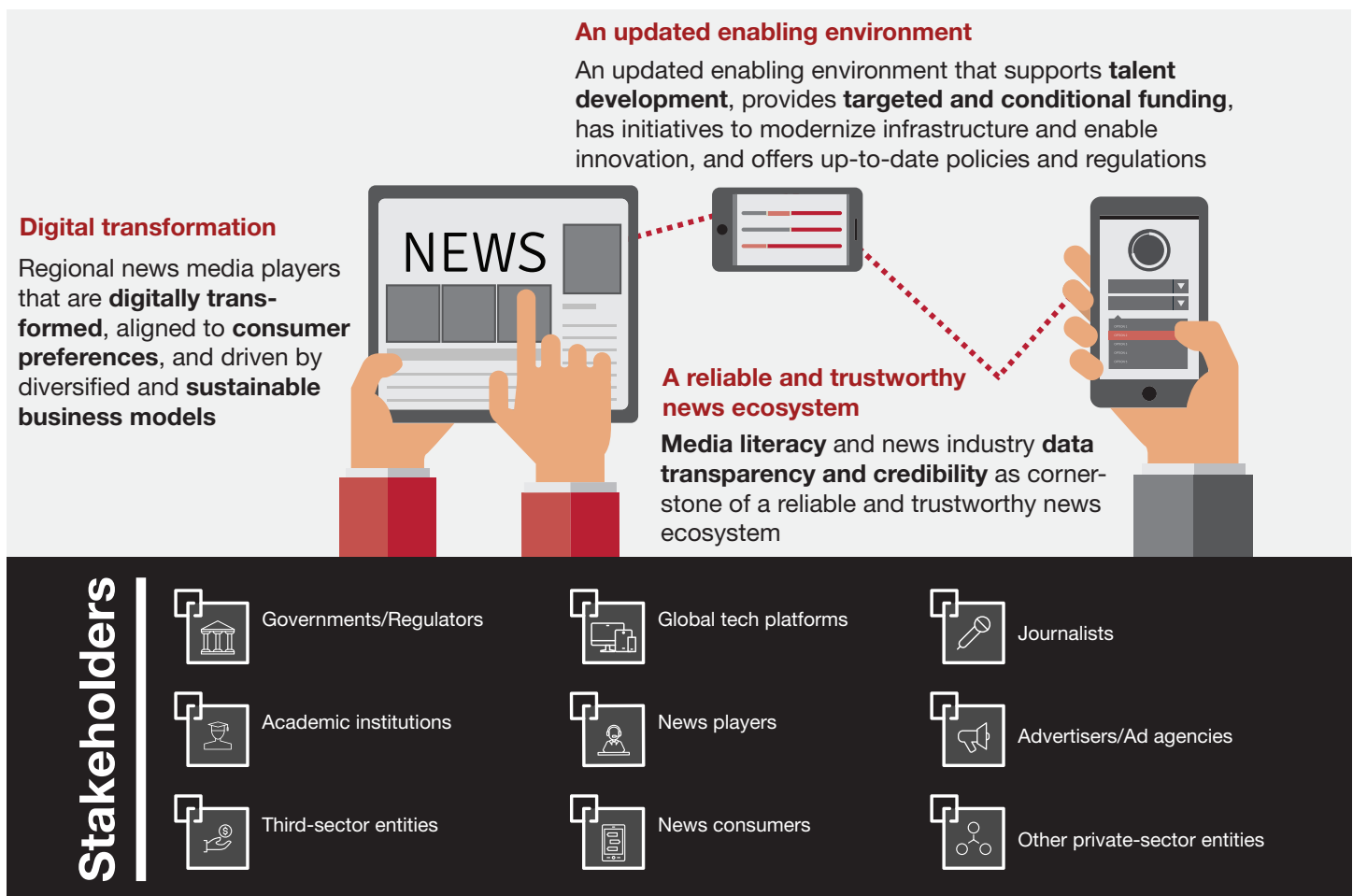
Note: UAE= United Arab Emirates. MENA = Middle East and North Africa, which here means Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.  
Source: PwC Global Entertainment & Media Outlook 2023-2027, [www.pwc.com/outlook](http://www.pwc.com/outlook), IAB MENA Digital Ad Spend Report 2022; World Bank data

# CALL TO ACTION: TRANSFORM FOR GROWTH

If MENA region news media players are to capture these opportunities, new strategies and close collaboration among all relevant stakeholders will be required to modernize and strengthen the ecosystem. Specifically, they will need to act to achieve three objectives: digital transformation, an updated enabling environment, and a reliable and trustworthy news ecosystem (see *Exhibit 12*).

## EXHIBIT 12

Digitally transformed, trusted players will thrive in a modernized, strengthened ecosystem



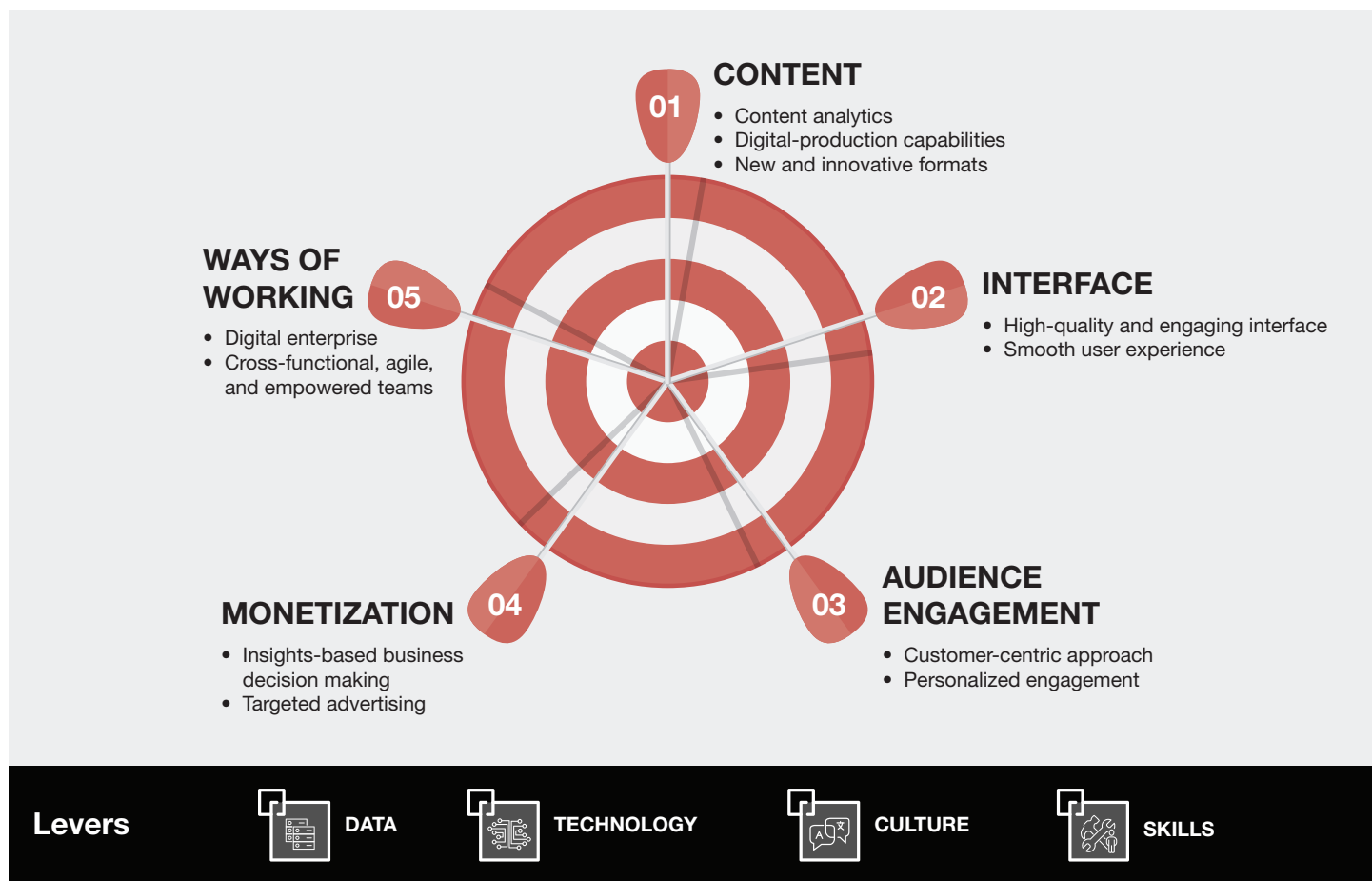
Source: Strategy&

## Digital transformation

The pursuit of digital transformation is crucial for news organizations if they are to remain relevant in the face of declining revenues in traditional print and broadcast markets. To navigate this shift effectively, it is imperative that they align their transformation efforts with the ongoing shift in consumer preferences, as well as pursue innovative business models and diversified revenue streams. Digital transformation requires fundamental changes across five dimensions (see *Exhibit 13*).

### EXHIBIT 13

Digital transformation in news organizations requires fundamental change in five dimensions



Source: Strategy&



## **Content**

The region's news organizations need to develop strong analytics to meet the demands of rapidly changing news markets and to shape their editorial strategies. By leveraging these analytics, news organizations can gain a deeper understanding of the type of content that appeals to consumers and how they engage with it. Furthermore, they should invest in the production capabilities required to produce this new, sought-after content, such as videos and podcasts. It is also essential to make use of innovative storytelling formats, including data journalism, gamification, virtual performances, and immersive reality. For example, the BBC's iReporter Game allows players to experience being a journalist inside the BBC newsroom.

## **Interface**

News organizations need to upgrade their websites and apps and must build high-quality interfaces. Ensuring a smoother and more efficient user experience can contribute to reducing churn and building user loyalty. It is also crucial for news players to work on their search engine optimization because it helps improve their online visibility and ensures that their content is easily discoverable. By getting the most out of their website and content for search engines, news players can attract more organic traffic and increase their chances of reaching a wide audience.

## **Audience engagement**

News media players need to adopt an audience-centric approach to serve news consumers better. This approach focuses on prioritizing the needs and preferences of the audience, leading to increased engagement and more personalized interaction, such as content targeting and recommendations. By understanding their audience better and catering to their specific needs, news organizations can build stronger connections with consumers and provide a more satisfying news experience.

## **Monetization**

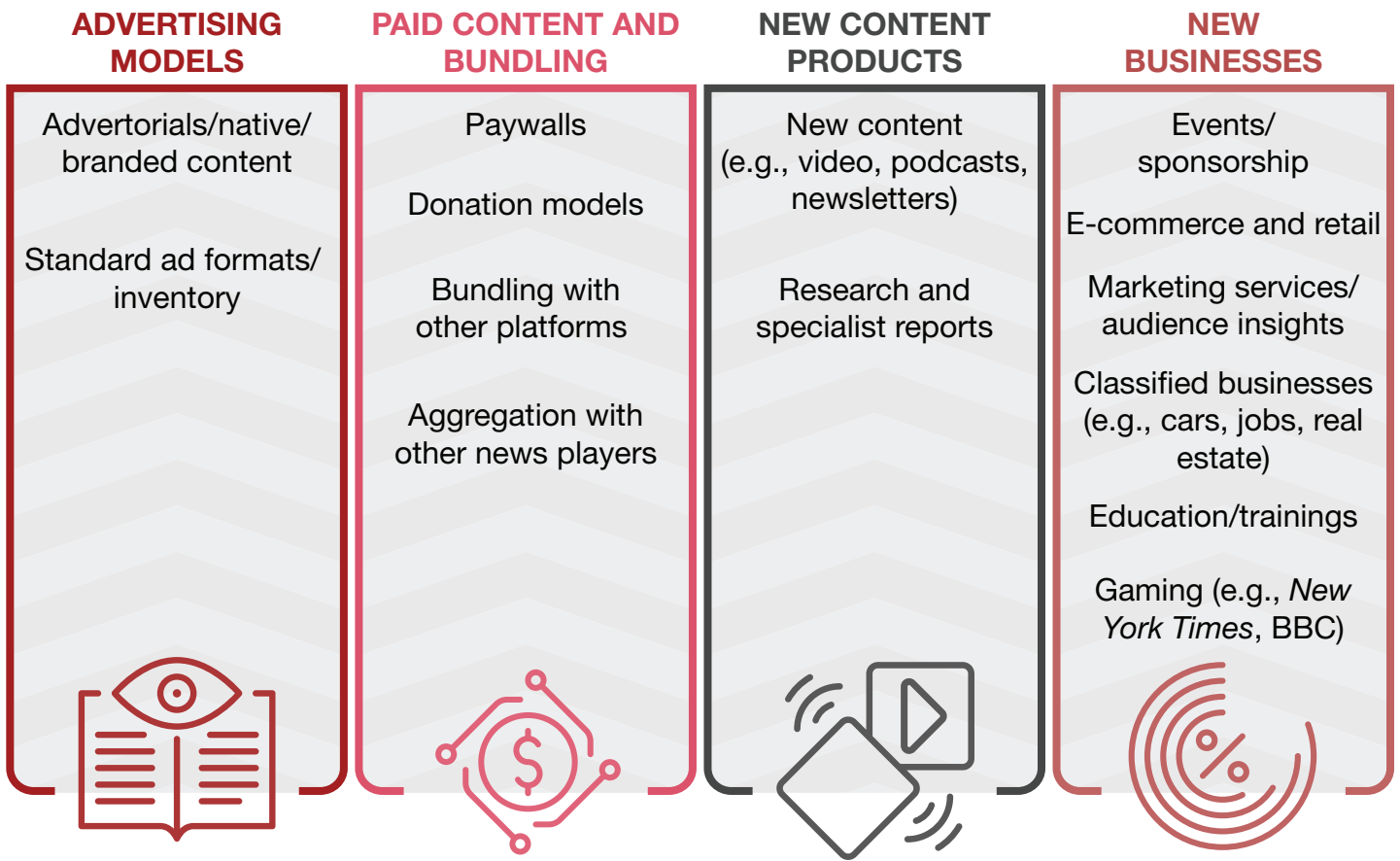
Global news brands such as the *New York Times* and *Financial Times*, as well as large national brands such as *Le Figaro*, *Le Monde*, *Helsingin Sanomat*, *Schibsted*, and *Dagens Nyheter*, have implemented digital transformation effectively and experienced healthy profit growth. By learning from these successful examples and exploiting digital platforms and strategies, MENA region publishers can capitalize on the changing landscape and capture new opportunities to diversify their business model and achieve similar positive outcomes in terms of financial performance.

On the advertising side, news publishers can revamp their ad models and introduce different formats, channels, and data analytics to improve monetization. They can also generate new advertising revenue by fully capitalizing on existing products and services offered by global tech platforms.

On the consumer side, news organizations can consider subscription-based models for exclusive content and industry-focused news. These may also include bundling of products with other news players, such as the bundling that took place between the *Times* (London) and the *Wall Street Journal*, and bundling with other content platforms, such as Amazon Prime and Spotify.

News organizations can find additional revenue streams through launching new content products such as podcasts and research and specialist reports. They can consider venturing into new businesses involving events, marketing and audience insights, and education and training (see *Exhibit 14*).

**EXHIBIT 14**  
**News publications can further diversify revenues by focusing on advertising, subscriptions, new content, and new businesses**



Source: Strategy&

### **Ways of working**

News media players should strategically reinvent how they work to revamp their cultures, improve their operations, and reorganize their teams. Reframing the organizational culture to promote change and experimentation can enhance adaptability, collaboration, and innovation. It can also inspire creativity among employees. Another important aspect is digitizing work functions and processes to streamline operations and improve overall efficiency. By adopting digital tools and technologies for tasks such as content creation, editing, distribution, and analytics, news media organizations can make workflows more efficient and reduce manual efforts. Additionally, reorganizing into cross-functional, agile teams can help bridge the gap between print and digital newsrooms. This approach facilitates collaboration and knowledge sharing across different departments, enabling a unified and integrated approach to news production and delivery.

### **An updated enabling environment**

A thriving news media industry relies on a supportive, updated enabling environment involving all stakeholders in its modernization efforts. This collaborative approach ensures that the industry can flourish and adapt to the changing landscape. By working together, stakeholders can support the development of a talent pool for news organizations, offer the necessary financial support to the industry, provide access to the required infrastructure and innovative technologies, and establish up-to-date policies and regulations (*see page 22*).

### **Talent development**

Government, academia, news organizations, and global tech players can join forces to expand talent development initiatives. They can increase the availability of newsroom and business skills training programs, launch career guidance and marketing initiatives to promote journalism, fund scholarships, and sponsor and support graduate programs and placement services. These programs are designed to ensure the availability of continual skills improvement for high-quality, digitally adept news media professionals, analysts, and fact-checkers.

### **Targeted and conditional financial support**

Governments, private-sector players, nonprofit organizations, and global tech platforms can contribute to the transformation of the news industry in the MENA region by launching news-related funds that target specific objectives (such as technology investments and capability building). Governments can offer news publishers subsidies and incentives that are conditioned on specific objectives and goals. They can also increase spending on news advertising and subscriptions with national news organizations—and consider offering consumer incentives to stimulate the digital circulation of national newspapers.

### **Infrastructure and innovation**

More initiatives are needed to bolster and modernize the technological infrastructure on which all news organizations depend. In particular, the implementation of cloud solutions, AI, and machine learning tools can increase operational efficiencies, improve the quality of reporting, and enhance consumer engagement and personalization. Furthermore, news media stakeholders can launch incubators and accelerators to enable innovation and provide funding, mentorship, and support to news startups.

## **Policies and regulations**

The region's governments can help ensure the future of the news media industry by reevaluating the regulatory framework through a consultative, evidence-based approach that considers the industry's input.

It is crucial to establish a level playing field that encompasses transparent and digital-ready content policies and regulations along with a risk-based approach to regulatory interventions. Governments can explore ways to improve intellectual property enforcement and legal protections for news organizations and media professionals to attract talent and enhance content quality. They can also foster self-regulation in the industry by encouraging associations for media professionals and supporting the creation of bodies that are independent and industry-led. Governments can also encourage transparency from news organizations in relation to content moderation policies and mechanisms to ensure the safety of audiences, in particular minors and other vulnerable groups.

## **A reliable and trustworthy news ecosystem**

Safeguarding news consumers and encouraging a media-literate and responsible society are policy priorities for a reliable and trustworthy news ecosystem. Stakeholders in the news industry can collaborate to develop education programs targeting consumers of all age groups and asking them to find news and gauge its trustworthiness. Furthermore, the industry's stakeholders can improve news credibility by promoting the establishment of independent fact-checking organizations, especially for Arabic-language content.

Another priority is for all stakeholders to collaborate and work closely together to ensure the availability of credible and transparent news data. They can develop research and news industry reports—compiling data on advertising spend, consumer preferences, and journalistic output—that are critical for better strategic foresight and informed decision-making.

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# CONCLUSION

The rapid changes in the news media industry in the MENA region have created new avenues for growth. However, the key challenge for the news players and stakeholders in the region is how to effectively capitalize on these opportunities.

To do so, a strategic and collaborative transformation is required, bringing together all stakeholders in the region's news media ecosystem. It is crucial for news organizations in the MENA region to digitally transform; adopt sustainable business models; and use agility, innovation, and productivity in their operations. Additionally, stakeholders such as governments and regulators, global tech platforms, academia, and other organizations from the private and nonprofit sectors need to modernize and strengthen the enabling environment of the news ecosystem. By achieving this transformation, the news industry in the MENA region can prosper.

# APPENDIX: SURVEY METHODOLOGY

Strategy& worked with YouGov to conduct a survey of around 4,500 respondents roughly equally distributed across Egypt, Saudi Arabia, and the UAE (see *Exhibit 15*). The consumer survey sought to understand news consumption preferences, habits, and patterns.

## EXHIBIT 15 Survey methodology

### Survey objectives

- Identify **preferred news consumption channels and formats**
- Identify **consumption patterns, habits, and satisfaction levels**
- Assess **willingness to pay** for news content

**4,500+** Representative respondents



### Basis for representative respondents

- Nationality
- City of residence
- Gender
- Age group
- Income group

### 21 questions across four areas

- ① **Channel, format, and device preferences**
  - Go-to formats
  - Preferred devices and formats
  - Preferred language and categories
  - Preferred news media outlets
- ② **Consumption patterns/habits**
  - Frequency of news consumption
  - Time spent per week
- ③ **Willingness to pay**
  - Desire to pay for quality news
  - Reasons to subscribe
- ④ **Satisfaction levels with journalistic output**
  - Quality and depth of news
  - Relevance
  - Authenticity

Note: UAE = United Arab Emirates.  
Source: YouGov survey results on news consumption preferences (2022)



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## ENDNOTES

1. Cost per thousand refers to the expense of 1,000 advertisement impressions per single web page.
2. Media landscapes: Expert analyses of the state of media, Egypt (<https://tinyurl.com/24hfy3a9>); Mohamed Hefny, “Two billion pounds of government support to save Egyptian newspapers,” *Okaz*, June 17, 2022 (<https://tinyurl.com/4rx8kwsu>); Ali Abdul Rahman, “President of the National Press: We thank the government for its continuous support to the national press institutions,” *Al-Youm al-Saba’a*, November 26, 2022 (<https://tinyurl.com/2p8bjtwv>).
3. The World Bank, Data Bank, Population estimates and projections (<https://databank.worldbank.org/source/population-estimates-and-projections/Type/TABLE/preview/on#>).



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