

Tunisian Youth and Media: Perspectives on Traditional and Alternative Media



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This study was conducted and designed by I Watch organization as part of
“Shabab Live”
a joint project with DW Akademie, Al-Khatt, and Al-Janna.

I Watch is a Tunisian non-profit and independent watchdog organization that aims to
fight financial and administrative corruption and enhance transparency.

“Shabab Live” aims at fostering the participation of Youth in the media in Tunisia and five
other countries.

The present study aims at generating significant insights into youth's perception of and
representation in both traditional and alternative media.

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1. INTRODUCTION

The present study was conducted by I Watch Organization as part of ShababLive, a joint project with DW Akademie, Al-Khatt, and Al-Jana. Funded by the European Union and the German Federal Foreign Office, ShababLive aims to foster the participation of young people in the media in Tunisia and five other Arab countries.

A regional pilot study produced under the ShababLive project by the Arab World for Research and Development (AWRAD) was published in March 2019. Entitled “Bridging the gap: Youth and broadcasters in Arab countries,” this focus group study focused on young people’s perceptions and expectations regarding traditional broadcasters and highlighted the causes behind young people’s growing disaffection for television and radio broadcasters.

The present study, which only covers Tunisia, aims to generate more granular and statistically significant insights into young Tunisian women and men’s perception of and representation in the media. Young people aged between 15 and 34 represented 33.2% of Tunisia’s total population according to the General Census of 2014. Together with women, they are entitled to a fair representation, in volume (media presence) and in quality, by the fourth estate. The youth-led Revolution of 2010-11 sought to end young people’s marginalization.

Since then, steps were taken to reduce their exclusion from formal political processes – by establishing quotas for the representation of women and young people in decision-making bodies – with debatable results. However, little has been done to improve women and young people's representation in the media which, more than any other force, are shaping the country's socio-political trajectory and are framing important national debates.

Past evidence, including from the first ShababLive pilot study, suggests that young people are dissatisfied with the ways in which traditional media are portraying them. I Watch's study deepens the investigation into this issue through systematic content analysis and through a deep dive into young Tunisian women and men's perception of their media presence and representation.

A few actors have made attempts to tackle the issue of women and young people's under- and mis-representation in Tunisian media. International donors, in particular, have exhibited a tendency to invest in reforming or incentivizing traditional media to render them more inclusive. Not only do the long-term effects of these approaches seem inconclusive but they also overlook an important factor in the media inclusion equation: young people's growing appetite for digital alternative media. Indeed, if alternative media has the potential to challenge the dominance of traditional media while also being more permeable to women and youth, they ought to be considered as an alternative avenue for enhanced representation of young Tunisian women and men. Indeed, whereas traditional media seem to resist the inclusion of youth and women, social media platforms offer them easy access to a space for expression and self-representation. In other words, social media provide young people, women, and all marginalized groups the possibility to create their own digital media rather than begging for inclusion by status quo forces – which might very well be on the brink of obsolescence. The present study seeks to highlight young people's perspectives into these ecosystem?

important issues and ultimately determine the most viable pathway for improved representation of women and young people: investing in traditional media reform or supporting the development of a youth-led alternative media

More specifically, this study sought to answer the following questions:

- What are young Tunisian people's media consumption habits?
- How do young people perceive traditional broadcasters and alternative media?
- How do they assess the presence and representation of women's and young people's voices in Tunisian media?
- How do they assess the future of both traditional and alternative media in Tunisia?

To answer these questions, I Watch employed a mixed-method approach combining quantitative and qualitative data.

2. METHODOLOGY

This study relied on three data collection methods: a media monitoring, a quantitative survey, and a series of focus group discussions.

2.1. MEDIA MONITORING

The media monitoring component of this study consisted in analyzing traditional media content – television and radio in particular – to identify patterns in gender and youth representations and better understand the role of editorial bias in constructing gender and generational stereotypes.

We analyzed a sample of 171 episodes (aired between February and September 2020) from a total of 46 radio and television shows across 15 channels: 6 television channels (1 public; 5 private) and 9 radio stations (2 public; 7 private). The sample is comprised of 2151 characters that appear, in various degrees of importance and in various capacities, in the episodes under study. The 46 radio and television shows which form the perimeter of the media monitoring study were participatively selected by a focus group of young media consumers, based on popularity as well as diversity along the following axes: type of media (radio and television), ownership (private and public¹), format² and topics of the shows, and geographic location of the media.

The analysis included a quantitative assessment of the representation of young people and women on television and radio. We calculated the proportion of young people aged 15-34 and women on each of the TV and radio shows we analyzed. Specifically, each character was categorized by gender and age. Age was divided into three categories: under 15 years old; 15-34; over 35.

Additionally, we introduced a qualitative dimension by analyzing the social roles in which television and radio characters are portrayed. The role variable was divided into 12 sub-categories which are not mutually exclusive and may overlap. These categories do not necessarily represent objective reality but describe the roles assigned to characters by the media or the quality in which a character is featured. For example, someone whose knowledge might be limited or biased may be portrayed by a journalist as an expert on a specific subject (e.g. epidemiology or terrorism). Conversely, someone who genuinely holds some expertise on a given subject may not necessarily be portrayed as an expert but instead be cast in another role, e.g. activist or success story. The classification of TV and radio characters is not always an evident operation. It does not reflect some objective quality but results from analysis of different

1 Private media which have been seized by the Tunisian state following the Revolution have been categorized as privately-owned as they intended to be privatized again and have retained their corporate culture after the confiscation of part or all of their capital

2 Tunisian serial fiction shows were excluded from the sample because of their seasonal character as they tend to be produced and aired during the month of Ramadan

contextual markers which indicate the social role in which the media intended to cast each character. Such markers may include, for example, narratives surrounding the character's appearance, editing (sequencing and omissions), lexical choices made by the journalist or presenter, but also other elements of context such as the activity carried out by the character during the show.

Table 1: Roles' sub-categories and identification

Role	Guidance for identification
Expert	Person who is asked to give a qualified opinion about a specific matter
Decision-maker	Person who is leading and making decisions for an organization. E.g. President of a football club, Regional director of an administration, CEO of a company
Journalist	Any person who is a journalist by training or who is paid to regularly attend TV or radio sets (chroniqueur)
Host	Main presenter of a TV or radio show
Politician	Any person who speaks on behalf of a political party, including partisan ministers and members of parliament
Activist	Person who defends a particular cause but who does not represent a political party. This includes union members, participants in protests, civil society actors involved in awareness campaigns

Role	Guidance for identification
Ordinary citizen	Person who is interrogated by the media in their quality as ordinary citizens, e.g. in a micro-trottoir or as witnesses to an event or incident
Artist	Actors, singers, and other artists
Success story/ Role model	Person who is presented as a role model or whose success is celebrated on the show
Victim	Person who is presented as a victim of an incident or a phenomenon, e.g. victims of violence against women

2.2. SURVEY

The study also comprised a national quantitative survey targeting young people aged 15-34 years.

We identified 6 independent variables: region, environment (rural vs. urban), gender, study level, marital status, and income level. 15 dependent variables were distributed under four categories:

- Media consumption habits;
- Trust in traditional media;
- Perceptions of the representation of youth and women in traditional media;
- Perceptions of alternative media.

2.2.1. SURVEY SAMPLING APPROACH

For the purposes of this survey, we relied on a multi-stage sampling technique:

- Stage 1 – Purposive selection of regions: we purposively selected 10 governorates out of Tunisia’s 24: Tunis, Ben Arous, Ariana, Manouba, El Kef, Gafsa, Jendouba, Sfax, Sousse and Tataouine. Criteria taken into consideration were primarily diversity (a balanced representation of Tunisia’s Northern, Central, and Southern regions, as well as interior and coastal regions), I Watch’s available resources (clusters of volunteers in I Watch regional offices), and the Shabab Live project’s geographic scope. The overall youth population of these 10 governorates was derived from the general census of 2014: 1,796,100³. This meant that for a 95% confidence level and a confidence interval of 2 at the overall population level, the total sample size should be equal or superior to 2398;
- Stage 2 – First stratification: The overall population was divided into 7 primary strata, corresponding to each region. At this stage, for sampling purposes, the four governorates forming the Greater Tunis region were bundled into a single stratum, while the rest of the governorates correspond to one stratum each;
- Stage 3 – Second stratification: To take into account gender diversity and potential differences across genders, we have chosen to adopt a gender-stratified comparative approach by dividing the 7 regional strata into 14 sub-strata accounting for the gender variable;
- Stage 4 - Probability proportional to size sampling: the minimal number of respondents in each region is proportional to its weight in the overall youth population determined at the first stage.

³ Recensement Général de la Population et de l’Habitat 2014 : Jeunesse et Vieillesse à travers le RGPH 2014, INS, October 2017.

Following this approach, we determined the following sample sizes:

Table 1: Roles' sub-categories and identification

Region	Males	Females	Total
Greater Tunis	588	588	1176
Sfax	212	212	424
Sousse	158	158	316
Jendouba	81	81	162
Gafsa	78	78	156
El Kef	49	49	98
Tataouine	37	37	74
Total sample size			2406

However, during the delivery of the survey, the enumerators slightly exceeded their targets (see Demographics section below). The number of excess respondents does not significantly alter the findings.

2.2.2. SURVEY DEMOGRAPHICS

The survey questionnaire was delivered face-to-face in Tunisian dialect to 2506 young women and men across the 7 regions:

Table 3:: Sample's regional and gender distribution

Region	Males	Females	Total
Greater Tunis	602	591	1193
Sfax	211	227	438
Sousse	163	165	328
Jendouba	84	82	166
Gafsa	79	82	161
El Kef	64	66	130
Tataouine	39	51	90
Total	1242	1264	2506

2.3.FOCUS GROUP DISCUSSIONS

This study comprised two series of focus groups which served distinct purposes. First, during the inception phase focus group discussions with young media consumers were aimed at informing the design of the survey questionnaire and the identification of the media monitoring sample.

Second, following the delivery of both the media monitoring and the quantitative survey, four focus group discussions were organized by I Watch between the 31st of October and the 13th of November, 2020. The discussions, which were intended to shed light on the media monitoring and survey findings, had different participation criteria as they were aimed at generating insights into the perspectives of different population groups:

Table 4: Focus groups details

Group	Criteria	No. of participants
Group A 'Women'	Women aged 15 to 34	7
Group B 'Teenagers'	Women and men aged 15 to 18	6
Group C 'General youth population'	Women and men aged 15 to 34	6
Group D 'Content creators'	Female and male content creators and alternative media professionals aged 18 to 34	6
TOTAL		25

2.4. RESEARCH LIMITATIONS

The results of this study should be interpreted with caution, bearing in mind the following limitations.

2.4.1. SURVEY SAMPLING LIMITATIONS

Although the survey sample was large enough for statistical measurement, the primary limitation to the generalization of the survey results resides in selection bias in relation to the area of residence of the respondents.

Due to resource and time constraints, the survey was delivered through I Watch's network of volunteers based at the organization's regional branches. This has two important implications on the perimeter of the survey sample:

- First, the survey could not be delivered in all of Tunisia's 24 governorates but only 10 where I Watch was able to mobilize volunteers to deliver the survey questionnaire between the 17th and 27th of September 2020. These 10 governorates are a diverse representation of the country's north-eastern, southern, and central regions as well as coastal and interior regions. Nonetheless, the results may not account for specificities which may be found in regions which are not part of the survey's scope. Therefore, caution should be exercised when generalizing the results to the national level;
- Second, the survey interviews were conducted by trained I Watch volunteers mostly in the urban centers in which the organization's local branches are located. Because of this, only 6.3% of survey respondents stated that they resided in rural areas whereas 32.3% of Tunisian young people aged 15-34 reside in rural areas according to the most recent census conducted by the National Institute of Statistics in 2014.

2.4.2. PERIMETER OF THE MEDIA MONITORING SAMPLE

A large number of television and radio shows were analyzed in the media monitoring component, but the sample may present some limitations. The channels and shows comprised in the sample are diverse and encompass both public and private media, radios and television channels, and a wide array of show types including news, entertainment, cultural, political, sports, and investigative shows in diverse formats (e.g. talk shows, interviews, reportage) and with varying degrees of popularity ranging from high-audience prime time shows to low-audience shows about niche topics. Although one may argue that it presents a certain degree of representativeness due to diversity, this sample is by no means a comprehensive review of Tunisian traditional media's output.



2.4.3. QUALITATIVE DIMENSION OF THE MEDIA MONITORING

The qualitative component of the media monitoring also has some limitations. Indeed, the nomenclature of roles which forms the analytical framework used to classify each character appearing on the shows we analyzed may not cover all the media roles assigned to characters on Tunisian television and radio.

Two categories in particular, which have been brought to light by insights from subsequent focus group discussions, would have particularly useful additions to the media monitoring analytical framework:

- Comedian: Individual whose purpose is to make the viewers or listeners laugh;
- Troublemaker: a wide category which includes any people who are deliberately presented by the media in a negative light, often in a stereotypical way, aimed at creating fear and panic. Examples: drug consumers, illegal migrants, prostitutes, delinquents.

Anecdotal evidence suggests that these may be roles frequently assigned to young people on Tunisian television and radio. In future research, these roles should be covered by media monitoring analysis frameworks to generate more precise insights into their prevalence among young media characters.

2.4.4. QUALITY OF THE MEDIA MONITORING DATA

While it is easy to accurately determine the age of public figures and major media personalities, doing so is more difficult in relation to less-known people, notably ordinary citizens, who appear on television, and on the radio in particular (especially if their age is not disclosed during the show). To ensure the quality of the data, we have established a quality control mechanism for more accurate assessments of the age of characters which involves verification through desk-based research and consultation of informants.

Nonetheless, classifying characters into age categories is an operation which is prone to error.

2.4.5. PERIMETER OF THE MEDIA MONITORING DATA

The media monitoring component studies the inclusiveness of radio and television shows through the lens of the age, gender, and role of speaking characters. This scope could have been extended by also analyzing the age and gender of back-office operators such as writers, technicians, producers working behind the scenes. Such data might have generated insights into the relationship between the inclusiveness of the production crew and the inclusiveness of the cast. This type of data, however, is not publicly available and collecting it would have been impractical given the time and resource constraints as it would have involved close cooperation and information sharing with the media under review.

3. YOUTH MEDIA CONSUMPTION

3.1. YOUNG PEOPLE ARE DISENGAGING FROM TRADITIONAL MEDIA

3.1.1 YOUNG PEOPLE TEND TO WATCH TV ONLY WHEN THEY “HAVE TO”

The proportion of young people who have disengaged from traditional media consumption is strikingly high. A majority of survey respondents declared that they never (17.4%) or rarely (34.9%) watched television.

Television provides a limited response to young people's needs. Focus group participants unanimously reported that television content is not aligned with their interests, that its quality is poor and that it is often archaic.

How often do you watch television?

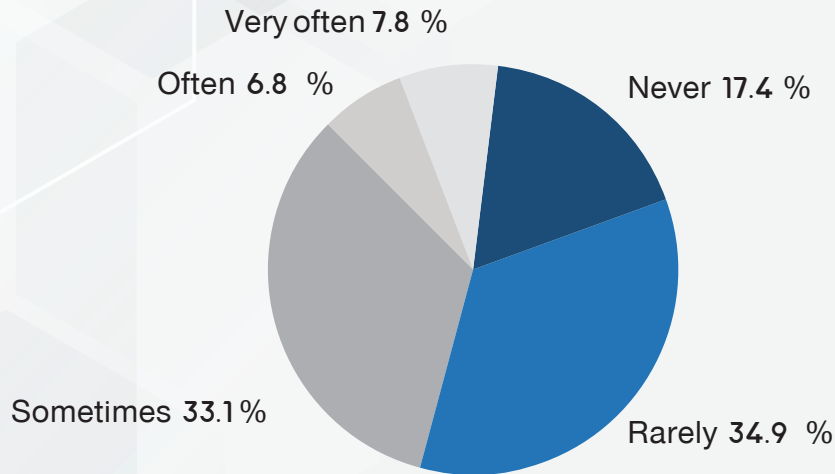


Figure 1: TV consumption habits

A few programs, however, stand as an exception. For example, Hamza Belloumi's "Les 4 V»rit»s" investigative journalism show, which airs on "El Hiwar Ettounsi", is cited by several participants as a reason to switch the TV on. Another reason to turn the TV on is to watch the evening news in times of crisis (e.g. political instability, terrorism, COVID-19 pandemic) or when an important speech or announcement is expected (e.g. curfew). Only older focus group participants reported watching Watania's evening news program regularly. But the main situation in which young people face the television set is when they watch it as a family, notably when "Choufli Ha!" is on air. This television comedy show, which was discontinued in 2009 but still airs, is widely regarded by focus group participants as public television's only worthwhile production. A participant from the Northwest also reported that the main reason he watches television is limited Internet access: "whenever the network is down, which happens often in my area, I turn the TV on."

Most focus group participants stated that they rarely watched TV on a television set, preferring streaming TV shows on the Internet. One of the reasons for this is young people's resistance to the television's mass broadcasting model and the value they assign to their own time. Young people tend to reject the idea of being bound by a TV schedule and being at the receiving end of a constant stream of content they did not choose. They favor laptop and smartphone streaming because it allows them to watch television shows at their leisure. Their critical attitude to television content is also not alien to their preference for streaming. Indeed, several focus group participants stated that online replays of TV shows allowed them to "skip the blah blah" and go straight to the parts they are interested in.

3.1.2. YOUNG PEOPLE ARE EVEN MORE DISENGAGED FROM RADIO CONSUMPTION

Nearly two thirds of survey respondents never (31.3%) or rarely (33.4%) listen to the radio which is facing greater decline.

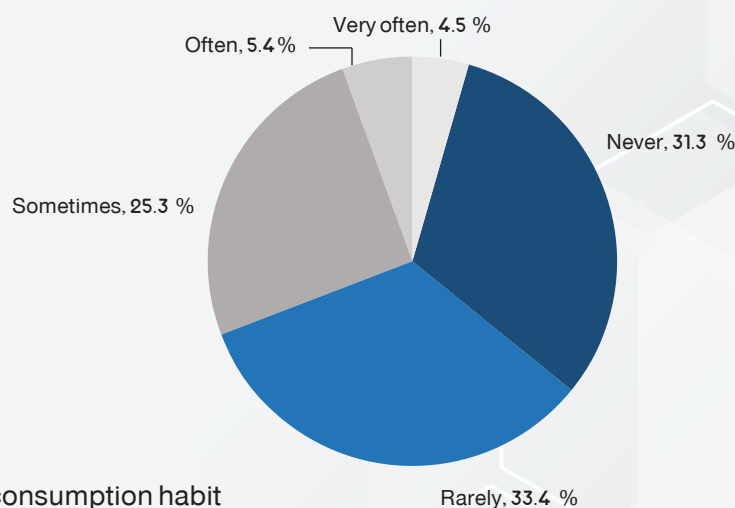


Figure 2: Radio consumption habit

Some focus group participants considered that the quality of the content on some radio channels such as Mosaïque FM, Shems FM, and Express FM was superior to television content.

3.2. DIGITAL MEDIA ARE CAPTURING THE ATTENTION OF YOUNG PEOPLE

3.2.1. DAILY INTERNET USAGE

Daily internet consumption is high among survey respondents. At the national level, 72.9% of young people spend 3 hours or more on the Internet on a regular day. Lack of access to the Internet stands very low at 1.8%.

On a normal day, how much time do you spend on the Internet?

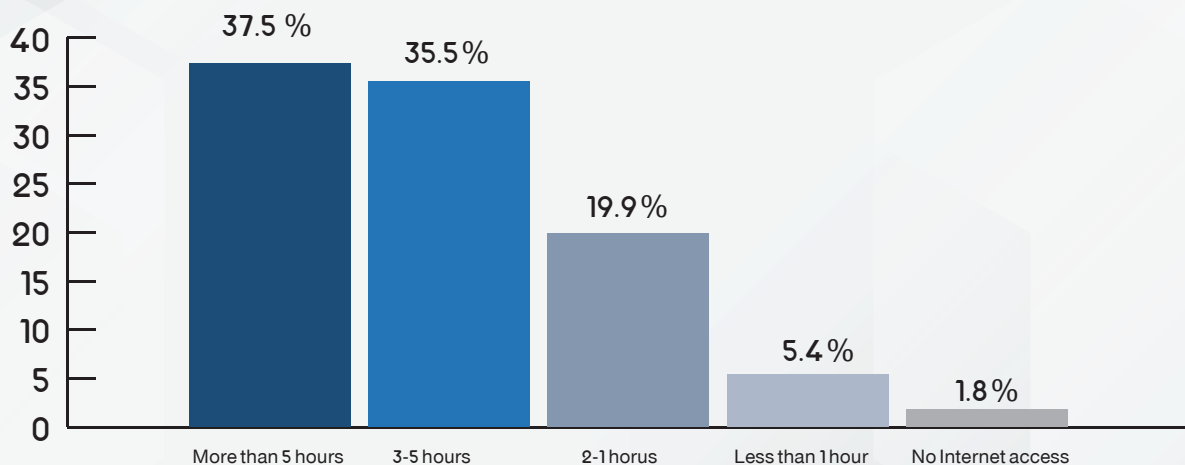


Figure 3: Internet consumption habit

3.2.2. A GENERATIONAL GAP IN INTERNET USAGE

This tendency is even stronger within Generation Z. The two lower age brackets' Internet consumption patterns are similar and nearly half of them spend more than 5 hours on the Internet daily. However, Millennials aged 26 to 34 tend to spend less time on the Internet: they are significantly more likely to spend less than 1 hour and less likely to use the Internet for more than 5 hours on a regular day.

On a normal day, how much time do you spend on the Internet?

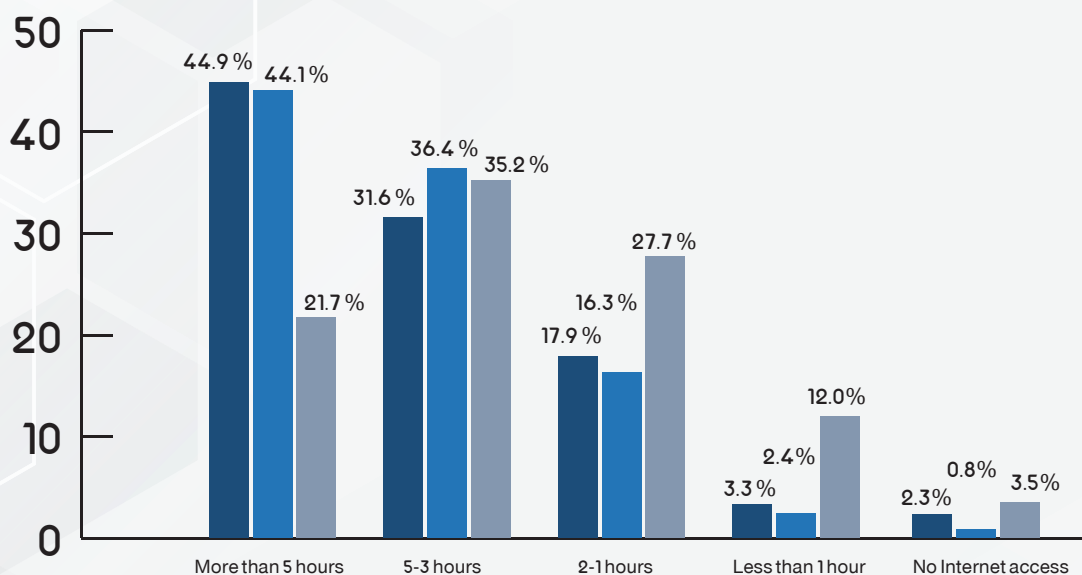


Figure 4: Daily internet consumption by age

3.2.3. REGIONAL DISPARITIES IN INTERNET USAGE

High daily Internet consumption is significantly more common in the capital compared to other regions. Internet usage is also higher in coastal regions than interior regions and is particularly lower in the Northwest.

Table 5: Regional disparities in Internet usage

Daily internet usage	Greater Tunis	Sousse	Sfax	Gafsa	Tataouine	Jendouba	El Kef
> 5 hours	47.8 %	36.6 %	30.4 %	28.6 %	23.3 %	19.3 %	13.1 %
3-5 hours	33.7 %	44.5 %	35.6 %	31.1 %	29.8 %	44 %	28.5 %
1-2 hours	15.3 %	16.2 %	23.1 %	28.6 %	31.1 %	25.9 %	34.6 %
< 1 hour	2.8 %	2.4 %	6.2 %	9.9 %	14.4 %	9.6 %	16.9 %
No access	0.4 %	0.3 %	4.8 %	1.9 %	3.3 %	1.2 %	6.9 %

3.2.4. YOUNG PEOPLE EXHIBIT A STRONG PREFERENCE FOR DIGITAL OVER ANALOGUE MEDIA

When asked to pick the top 3 activities they performed the most on a regular day, survey respondents exhibited a strong preference for digital over analogue media.

The 5 most-cited activities are all forms of digital media consumption. Facebook stands significantly higher than any other daily activity at **74.9%**, followed by Instagram (**48.6%**), YouTube (**41.7%**), movies and series streaming (**37.3%**), and reading news websites (**24.3%**).

Traditional and analogue media rank much lower. TV is cited by **20.9%** of respondents while radio is mentioned by **9.4%**. Newspapers, a dying industry from the perspective of young people, are the least consumed media (**3.5%**).

On a normal day, which activities do you do the most?

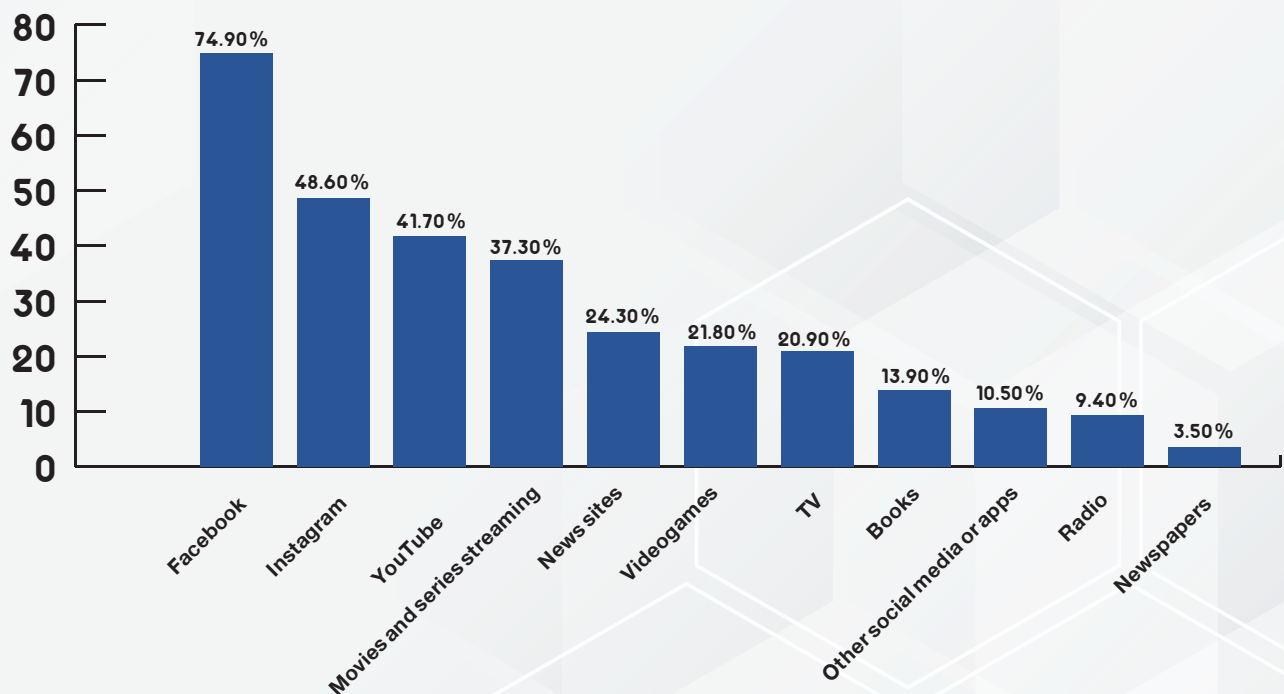


Figure 5: Daily activities habit

Interestingly, the three most common activities are social media platforms where content tends to be produced by individuals – sometimes peers – and can be interacted with, rather than by organizations (e.g. movies and series, news sites, videogames). Another reason for preferring social media to traditional media was advanced by focus group participants: social media has become the primary communication channel of official actors. Not only institutions such as the Presidency of the Republic, the Presidency of the Government or the Ministry of Health, but also public figures tend to publish data and announcements on social media first. Because of this, young people no longer need the mediation of news outlets which tend to report information slower than social media. Traditional media also has a tendency of distorting information, and a large number of focus group participants reported that they preferred to get information from primary sources via their official Facebook pages.

3.2.5. FACEBOOK IS LOSING GROUND AMONG TEENAGERS

Even though using Facebook is cited the most common daily activity, its position is eroding among teenagers. “Our generation only uses [Facebook] to share memes,” said focus group participants. One of the reasons teenagers told us they were deserting Facebook is the proliferation of fake news, and they primarily blame older generations for disseminating disinformation. Older people’s irruption into the Facebook space is indeed a key driver of teenagers’ disengagement from the platform.

“Facebook is full of old people who are posting silly stuff” – Teenager (focus group)

“Older people post things that are unrelatable to us. In five years, I don’t see myself using Facebook” – Teenager (focus group)

“Older people are too active on Facebook and they flood our feed so we’ve moved to Instagram.” – Teenager (focus group)



The image-sharing platform Instagram is indeed very popular among the younger generation, but they are also exploring other social media apps such as TikTok, Discord, Snapchat, and Twitch.



4. TRUST IN TRADITIONAL MEDIA

4.1. YOUNG PEOPLE LARGELY DISTRUST TRADITIONAL MEDIA SOURCES

4.1.1. PUBLIC MEDIA ARE MORE TRUSTED THAN PRIVATE MEDIA OUTLETS

More than two thirds of survey respondents stated that they do not trust public television and radio channels.

Do you trust state-owned television and radio channels?

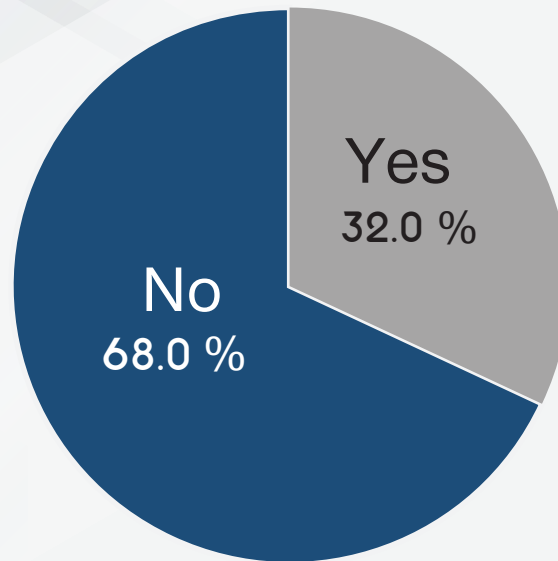


Figure 6: Trust in state owned TV and radios

Although trust in state-owned broadcasters is low, it remains significantly higher than trust in private television and radio channels which stands at 19.6%.

Do you trust private television and radio channels?

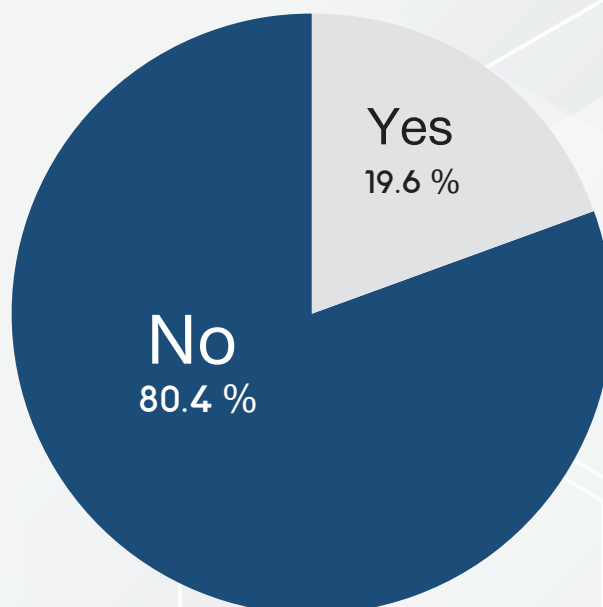


Figure 7: Trust in private TVs and radios

We asked the minority (19.6%) of respondents who stated that they trusted private broadcasters which television and radio channels they trusted the most. Four media outlets – 3 televisions and 1 radio station – stand out: El Hiwar Ettounsi (23.21%), Mosaique FM (17.6%), Nessma TV (13.3%), and Attassia (12.39%). Taken together, these four media outlets collect 66.5% of trust while the rest of the media taken together collect 33.5%.

If you trust private media, which TV and Radio channels do you trust the most?

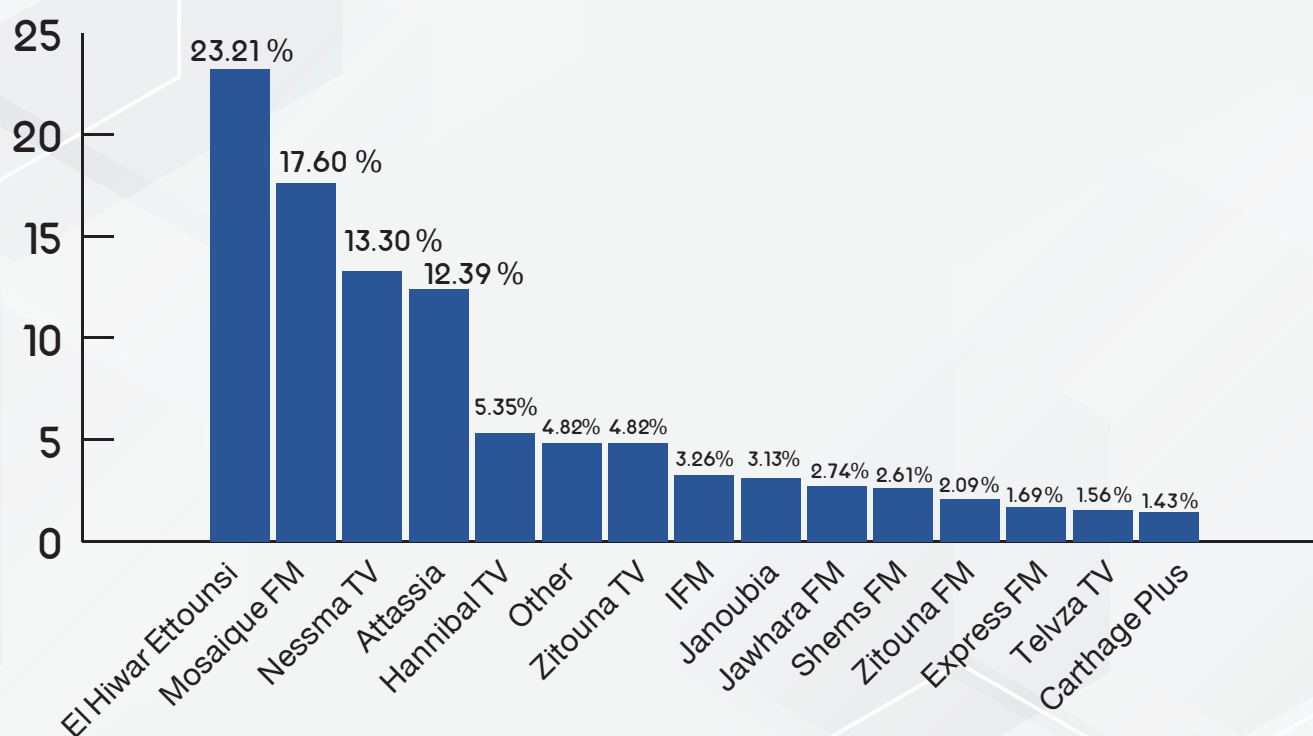


Figure 8: Ranking of trust in media channel

4.1.2. YOUNG ADULTS ARE EVEN MORE SCEPTICAL OF TRADITIONAL MEDIA

While the lower and higher age categories exhibit similar levels of trust in both public and private media, the 19-25 category stands out as significantly more sceptical of traditional media. Causes of this gap remain uncertain.

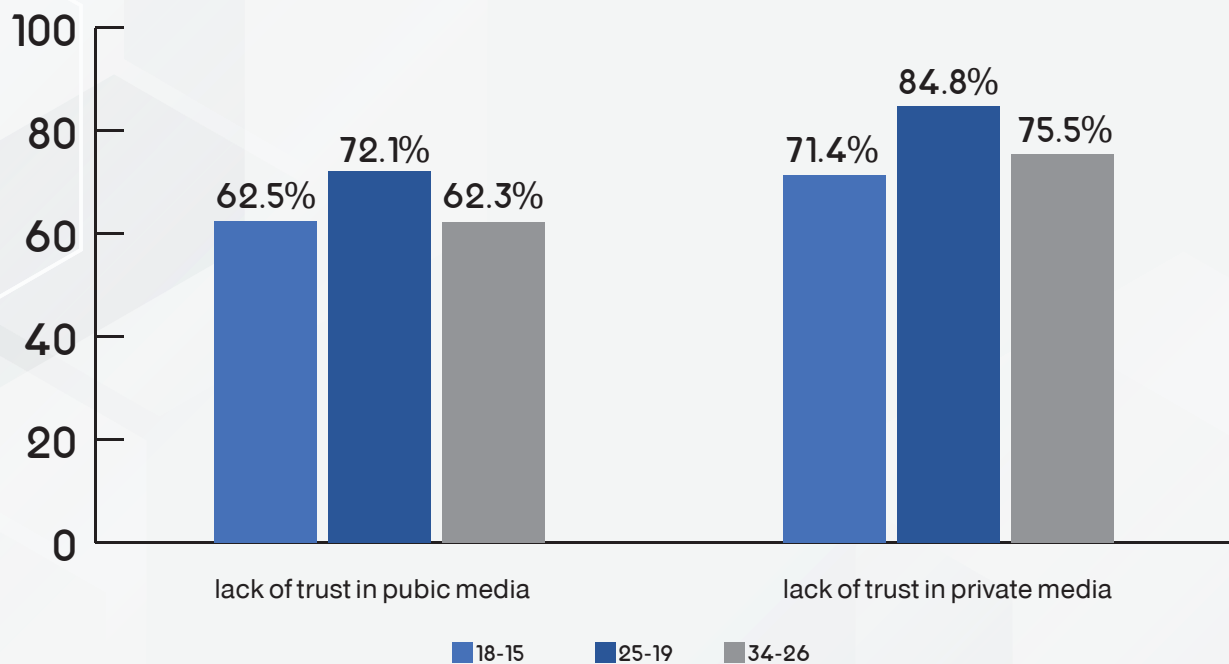


Figure 9: Lack of trust in media by age group

4.1.3. REGIONAL DISPARITIES:

Scepticism of public media is significantly higher among young people in the Greater Tunis, compared to other regions. El Kef stands out as the only region where a majority of young people report that they do trust public media (73.1%).

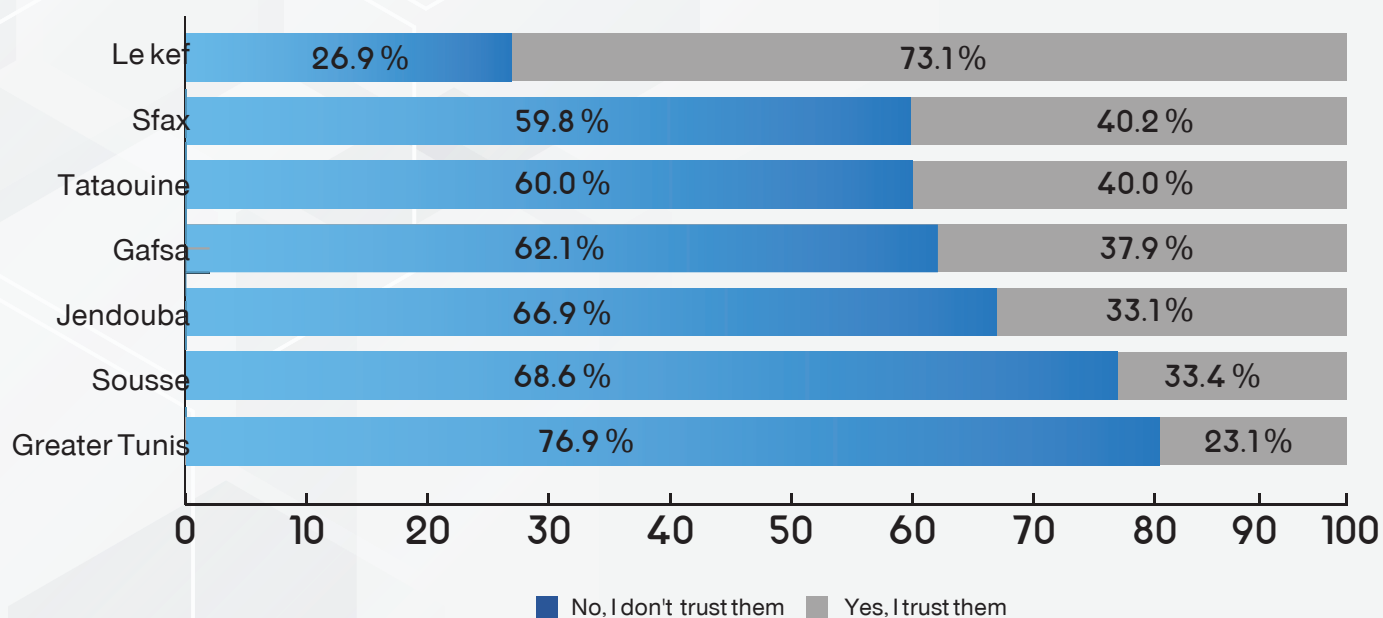


Figure 10: Trust in public media by region

We observe rather similar patterns when it comes to trust in private media: youth in the capital is more sceptical than youth from other regions while El Kef is the only region where a majority of young people still trust private media.

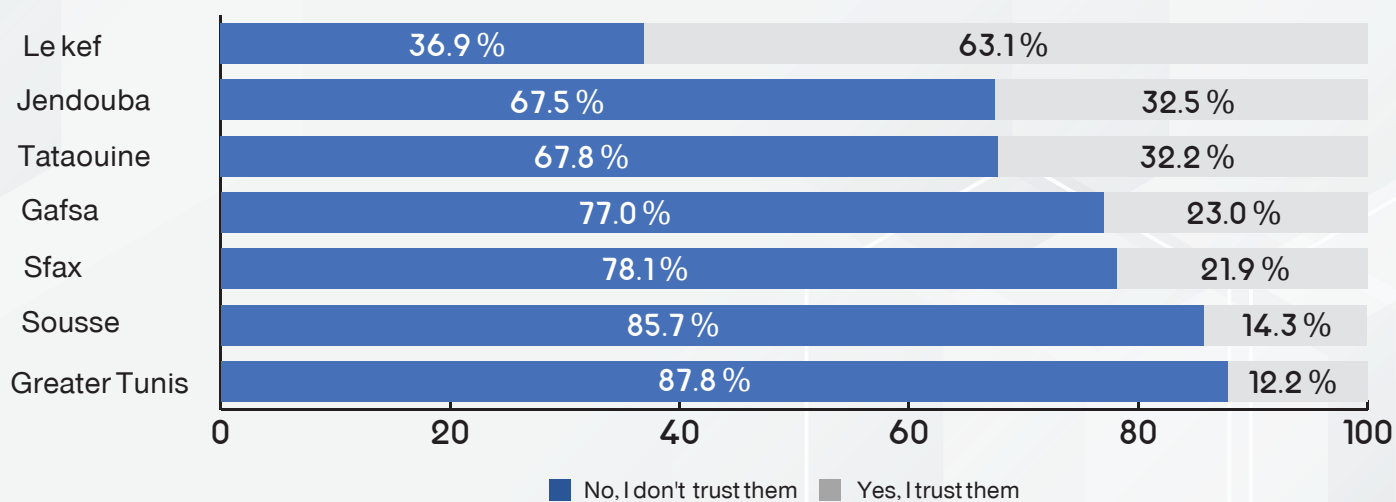


Figure 11: Trust in private media by region

4.1.4. THE MORE EDUCATED YOUNG PEOPLE ARE THE LESS THEY TRUST TRADITIONAL MEDIA

Survey data suggests that trust in traditional media and study level may be related. Indeed, university graduates are significantly likelier to distrust public media, while primary graduates and young people who dropped out from primary school are the most likely to trust public media.

Lack of trust in private and public media by age category

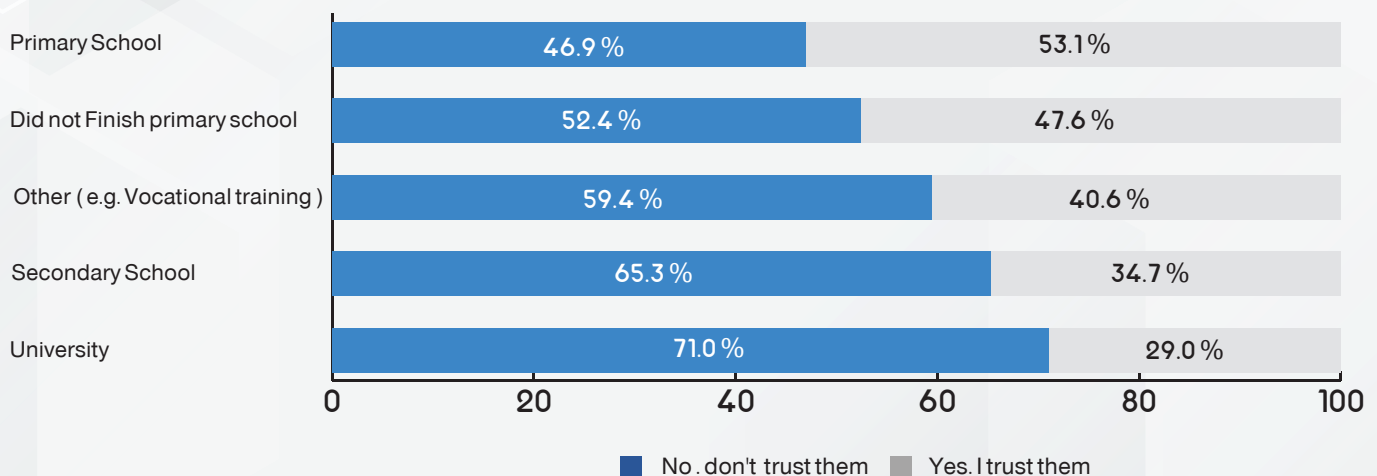


Figure 12: Trust in public media by study level

Similar patterns are observable with regard to private media: university graduates (alongside people with non-university degrees) are likelier to distrust private media while primary school graduates and people who dropped out of primary school's trust in private traditional media is the highest.

Trust in private media by study level

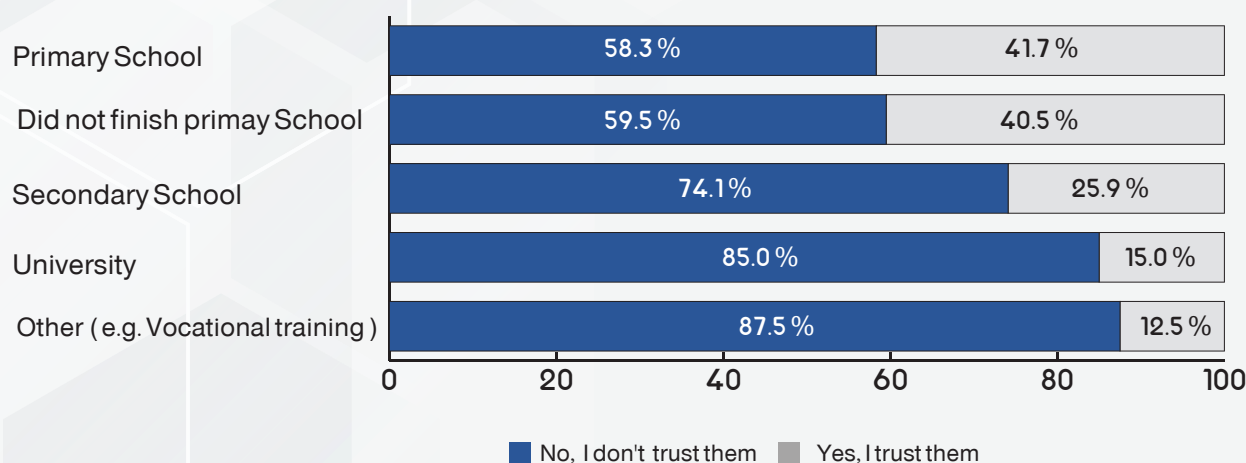


Figure 13: Trust in private media by study level

4.2. YOUNG PEOPLE DO NOT SYSTEMATICALLY TRUST ALTERNATIVE MEDIA

Strong distrust in traditional media does not automatically translate into trust in alternative media. Alternative media are such a broad and heterogeneous category – ranging from popular TikTok comedians to science YouTube channels to established digital media such as Nawaat or Inkyfada – that it would have made little sense to ask survey respondents whether they trusted alternative media in general. Instead, trust in alternative media was explored in focus group discussions. Whether it is in relation to traditional or alternative media, young people's trust is very selective. Focus group participants did not trust any media platform or media type inherently. They displayed acute awareness of the proliferation of disinformation – which they quite rightly associated with older adults' Facebook feeds. Indeed, focus group findings seem to be in line with international studies suggesting that Generation Z has a greater ability to spot disinformation and that Boomers are significantly more likely to spread disinformation on social media.⁴ Young people also expressed the belief that vested interests were largely responsible for editorial bias in traditional media.

“I only trust official accounts like the Presidency of the Republic’s Facebook pages or ministries. I feel that media are under pressure to serve a specific agenda, so I’m sceptical and I don’t rely on them.” – Young woman (Women’s focus group)

Young people’s standard attitude to information conveyed by the media seems to be scepticism. Many focus group participants told us that they often – even systematically for some – felt the need to double-check both traditional and alternative media claims by consulting primary sources which are often readily available on social media. Several information verification strategies were mentioned during focus groups, including checking public institutions’ verified Facebook pages or treating traditional media merely as a repository of public announcements and statements and disregarding editorial content.

“I listen to the news on the radio or on radio stations’ Facebook pages, but always with a lot of suspicion. I always look for primary sources.” – Young woman (General population focus group)

4 Guess, Andrew, Jonathan Nagler, and Joshua Tucker, "Less than you think: Prevalence and predictors of fake news dissemination on Facebook" *Science* (advances 5, no. 1 (2019); and Brashier, Nadia M., and Daniel L. Schacter, "Aging in an Era of Fake News" *Current Directions in Psychological Science* (2020

“I take my news from articles on Express FM’s website because they are always backed by interviews with the primary source.” - Young woman (General population focus group)

Many focus group participants place their trust in individuals rather than in media organisations. Trusted individual source of information mentioned during focus groups ranged from friends, relatives, specific journalists to digital influencers or civil society activists. A participant stated that he outsourced information verification to trusted friends who are well-informed. One participant who previously stated that she generally did not trust media outlets conceded that she nonetheless trusted select journalists like Haythem El Mekki and Zied Krichen whose opinion and analyses she values. Several young people also told us that they trusted a small number of investigative journalists. With regard to public affairs, some stated that they trusted civil society personalities such as Cheima Bouhlel, Achref Aouadi or Ala Talbi rather than politicians or journalists.

When it comes to alternative media, participants also displayed selective trust. With regard to public affairs, some stated that they trusted civil society personalities such as Cheima Bouhlel, Achref Aouadi or Ala Talbi rather than politicians or journalists. Some structured alternative media such as Nawaat were also singled out as trusted sources.

Whereas young adults aged 19 or more – especially those in the 26-34 bracket – were more likely to trust conventional sources such as institutions or select journalists, teenagers tend to trust digital media channels which are run by fellow young people – often exclusively. The following sources were mentioned by several teenage participants as highly trusted:

- The Lycéna Facebook and Instagram accounts which are run by high-school students and share information related to education;
- Louay Cherni who runs educational YouTube and Instagram channels through which he analyses national and international politics and current affairs. He recently started a collaboration with Nawaat;
- Khormologia who runs a popular science show on YouTube.

5. WOMEN AND YOUTH REPRESENTATION IN TRADITIONAL MEDIA

Representation is a multi-dimensional concept which has been described as elusive and “misleadingly simple: everyone seems to know what it is, yet few can agree on any particular definition.”⁵ For our purposes, representation is broken down into two broad dimensions: a quantitative and a qualitative dimension.

In political discourse, the term representation – especially in relation to women and youth – commonly refers to a particular group’s share in the composition of a political body. The Tunisian Constitution of 2014, for example, guarantees the representation of youth in the local councils as well as the representation of Tunisians residing abroad in Parliament through a system of quotas. In this proportionalist understanding, representation is a “numerical distribution of seats”⁶ between different groups of people. This view of representation – referred to by some authors as “descriptive representation” – assumes that “[...]true representation [...] requires that the legislature be carefully selected that its composition corresponds accurately to that of the whole nation.”⁷ In a sense, descriptive representation is a quantitative measure of inclusion.

In media terms, descriptive representation is a measure of a group’s presence on the screen or radio waves or, to be more precise, the proportion of a group within the wider population which is represented. Through the media monitoring component of this study, we have quantified the proportion of both women and young people who appear on 46 radio and television shows.

However, cultural studies scholars and Stuart Hall in particular have argued that representation does not merely mirror reality but is constitutive of reality:⁸ media representation creates reality by normalizing world-views.⁹ Indeed, representations are constructed images that carry ideological connotations. The ways in which the media represents a group structure social idea about that group.

5 .(Dovi, Suzanne, "Political Representation," The Stanford Encyclopedia of Philosophy (Fall 2018 Edition), Edward N. Zalta (ed

6 .(Wängnerud, Lena, "Women in parliaments: Descriptive and substantive representation," Annual Review of Political Science, 12 (2009

7 .Pitkin, Hanna F., The Concept of Representation, Vol. 75, University of California Press, 1967

8 .Hall, Stuart, "The work of representation," Representation: Cultural representations and signifying practices 2 (1997): 13-74

9 .Fürsich, Elfriede, "Media and the representation of Others," International Social Science Journal 61, no. 199 (2010): 113-130

For example, stereotypes constructed by the media influence society's perception of and attitudes towards certain groups and they may also influence decision-making processes and policies towards such groups. It is, therefore, the meaning of a representation that determines its value. The representation of a group by the media, however recurrent or voluminous, can be limited or problematic if they are negative or normalize stereotypes.

In other words, what matters most is not the extent to which women and young people appear or are present in the media, but the meaning conveyed by their representation. When studying a group's representation by the media, one should, therefore, pay attention to the context in which they are represented and specifically:

- The discourse about that group;
- Ideological underpinnings of a group's representation;
- The extent to which a group is represented by actors who are external to it and whether that group has control over its media representations, i.e. whether they are provided space to self-represent;
- The group's perception of its media representations, notably whether the group identifies or can relate to the image constructed by the media and to the individual who are granted a platform to represent them.

The opposite of quantitative representation is under-representation, whereas the opposite of qualitative representation is misrepresentation. This section of the study investigates both under-representation and misrepresentation of women and young people in traditional media.

5.1. WOMEN AND YOUNG PEOPLE ARE UNDER-REPRESENTED IN TRADITIONAL MEDIA

In this sub-section, we compare youth perceptions of women and young people's quantitative representation or inclusion in traditional media with the actual proportion of women and young people measured in the media monitoring phase of the study.

5.1.1. WOMEN ARE SIGNIFICANTLY UNDER-REPRESENTED IN TRADITIONAL MEDIA

About half of survey respondents believe that women are sufficiently represented in traditional media.

Are women sufficiently represented in traditional media?

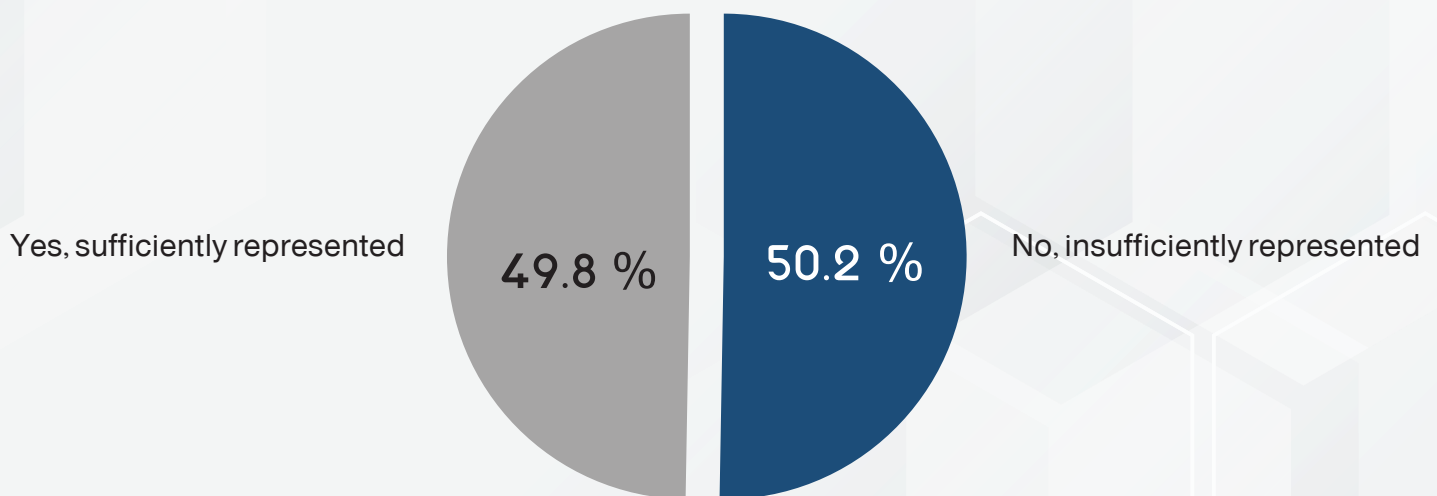


Figure 14: Opinion in women's representation in traditional media

However, responses to this question varied significantly based on the gender of the respondent. Indeed, 59.3% of female respondents believe that women are not sufficiently represented in traditional media while only 41% of male respondents think so. These perceptions contrast with media monitoring findings which show that women are indeed significantly under-represented in traditional media: only 27.5% of characters appearing in our sample were women.

Media appearances by gender

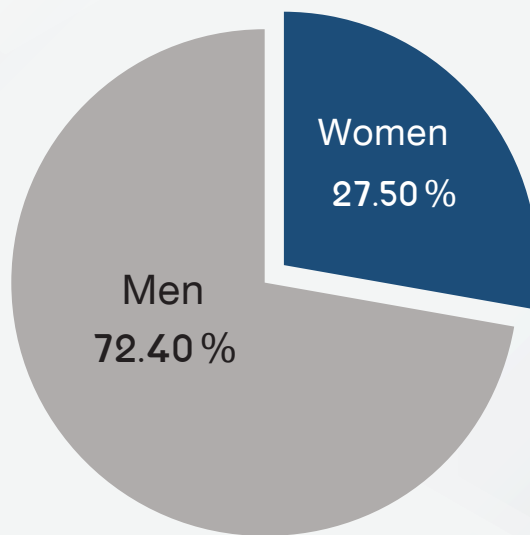


Figure 15: Media appearance by gender

5.1.2. YOUNG PEOPLE'S REPRESENTATION IS NOT MEANINGFUL

An overwhelming majority of 78.8% of survey respondents stated that, in their opinion, young people are not sufficiently represented in traditional media.

Are young people sufficiently represented in traditional media?

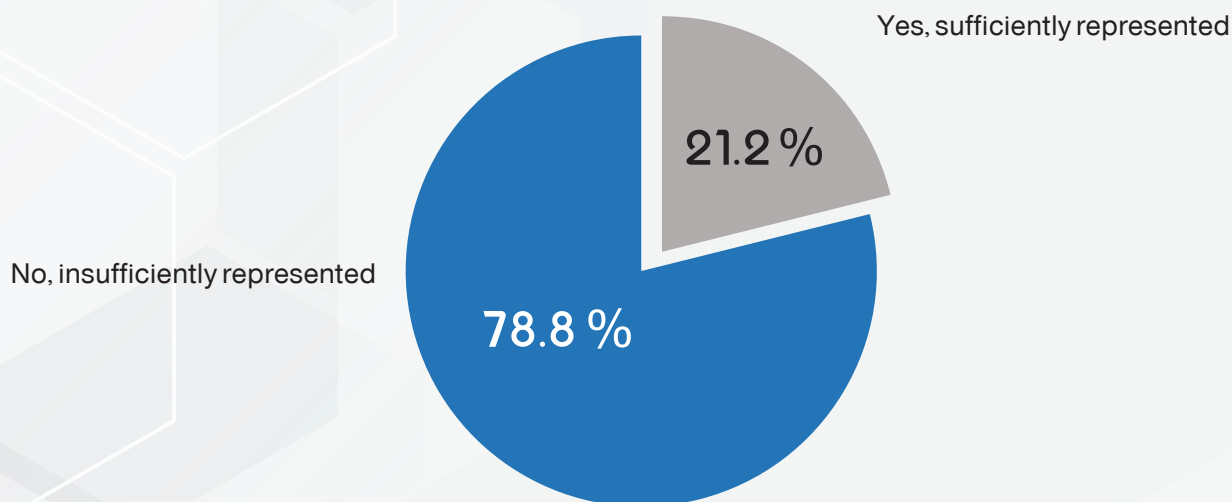


Figure 16: Opinion on youth's representation in traditional media

However, responses vary depending on the region of the respondents. Young people in the Greater Tunis were the most likely to respond that youth representation in traditional media was insufficient (83.8%). Jendouba was an outlier with only 52.4% of young people who believe that youth representation is insufficient.

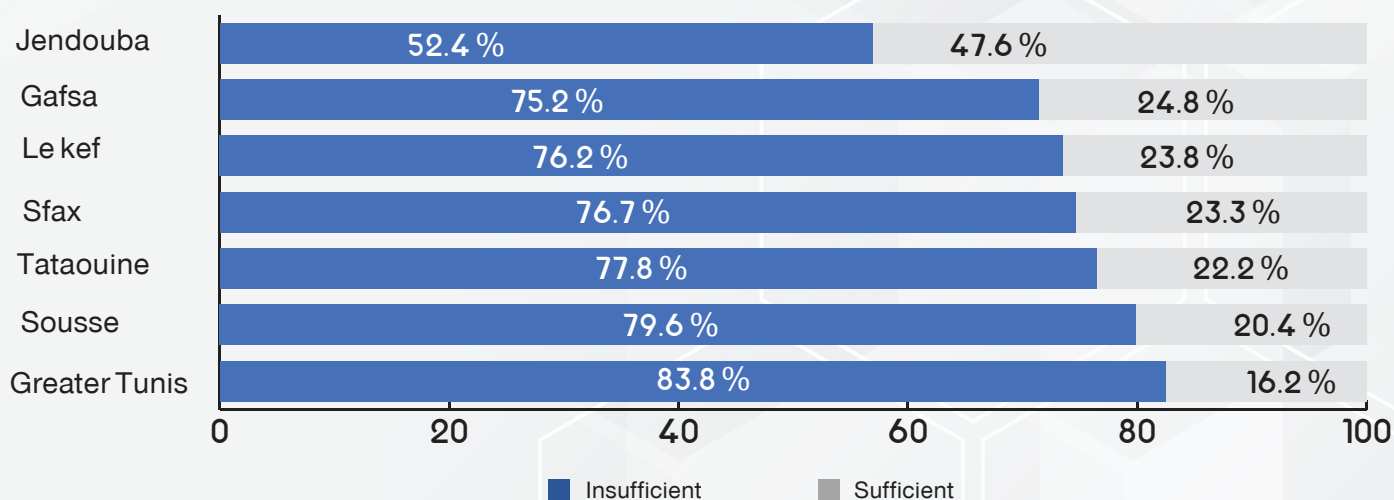


Figure 17: Perceptions of youth representation in traditional media by region

Answers to the survey are not aligned with media monitoring findings which show that, even though young people are significantly less represented than older adults, the share of young people appearing on television and the radio (29.4%) is almost proportional to their share in Tunisia's total population according to the General Census of 2014 (33.2%).¹⁰

Media appearances by age

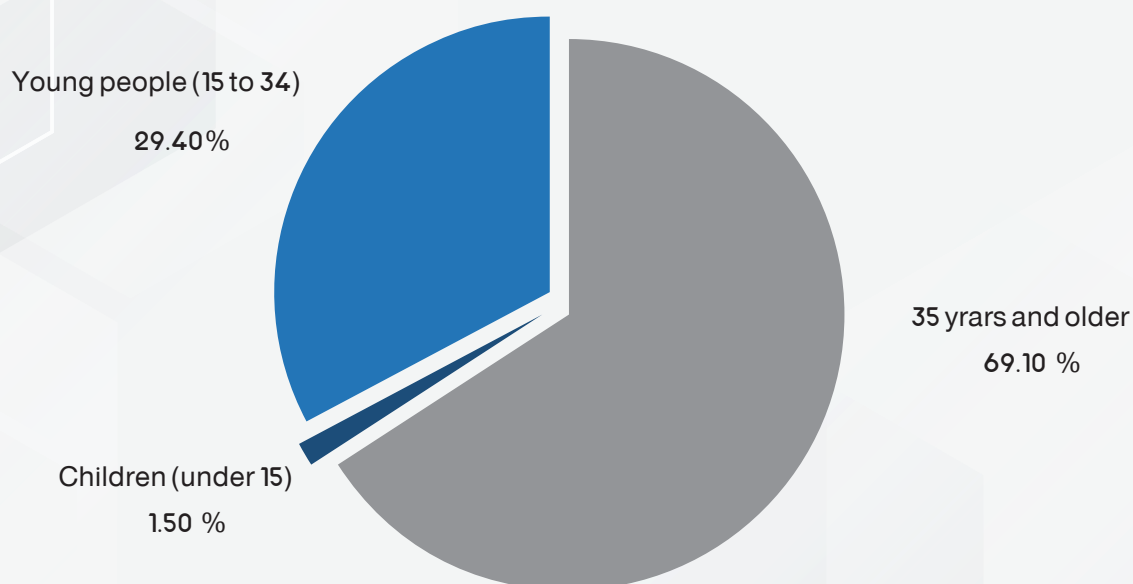


Figure 18: Media appearances by age

5.1.3. INCLUSIVENESS BY MEDIA OWNERSHIP

Although state-owned media channels are supposed to be more inclusive by virtue of their public service mission, they are significantly less inclusive of women than private television and radio channels. Indeed, 17.4% of characters appearing on public television and radio channels are women compared to 30.3% on private outlets.

¹⁰ .Recensement Général de la Population et de l'Habitat 2014 : Jeunesse et Vieillesse à travers le RGPH 2014, INS, October 2017

Media appearances on state-owned and private channels - Gender comparison

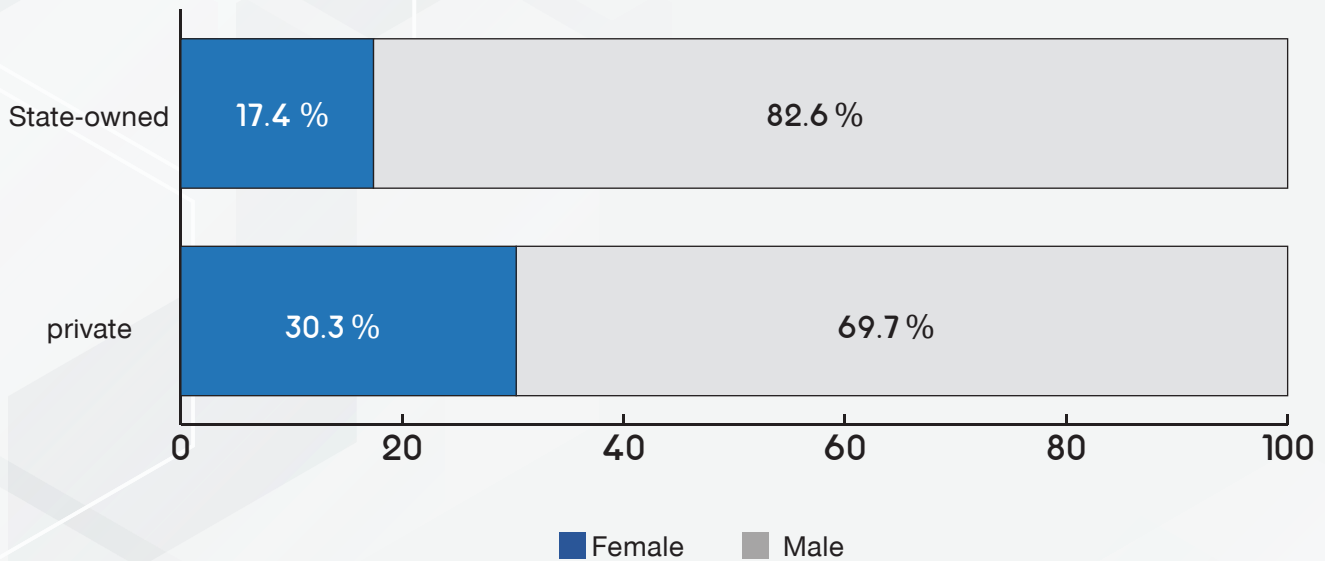


Figure 19: Media appearances on state-owned and private channels- Gender

Public media are also less inclusive of young people than private media: 15.9% of characters appearing on public channels are aged between 15 and 34 while this age category represents 33.1% of the characters appearing on private channels.

Media appearances on state-owned vs private channels - Age comparison

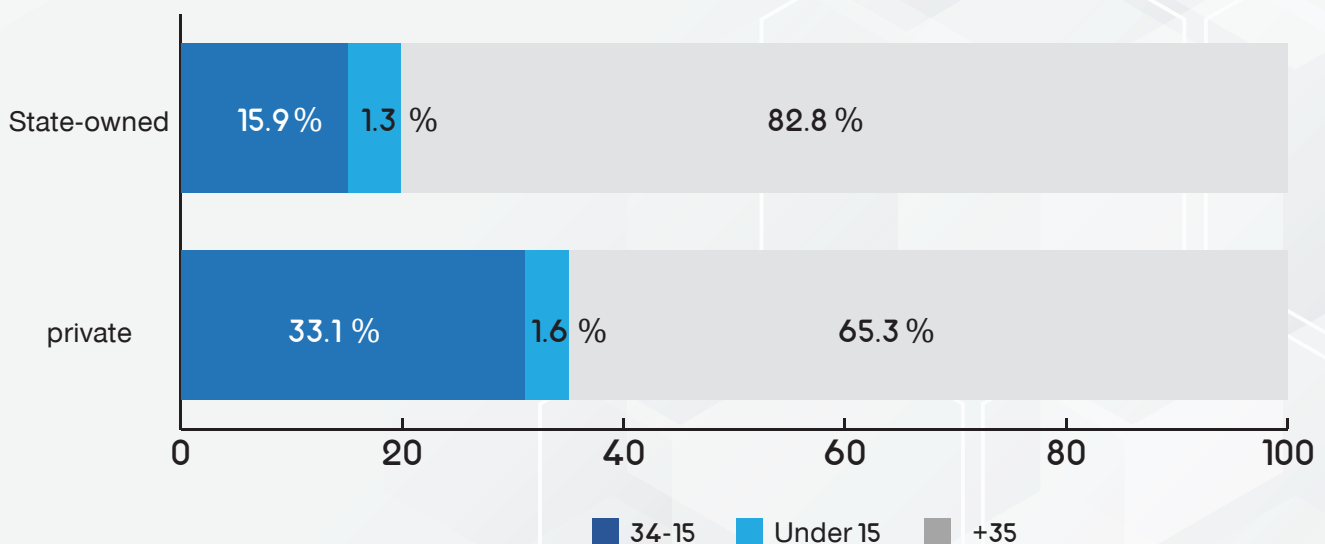


Figure 20: Media appearances on state-owned vs private channels - Age

It is unclear whether these discrepancies find their roots in the organizational culture of public media or whether the market forces influencing private media incentivize greater inclusion of women and youth or whether this gap may be explained by other unknown factors.

5.1.4. INCLUSIVENESS BY MEDIA TYPE

According to our media monitoring data, the radio is significantly more inclusive of women than television. Women represent 32.8% of the speakers on the radio, compared to 26.3% on television channels.

Media appearances on TV and radio - Gender comparison

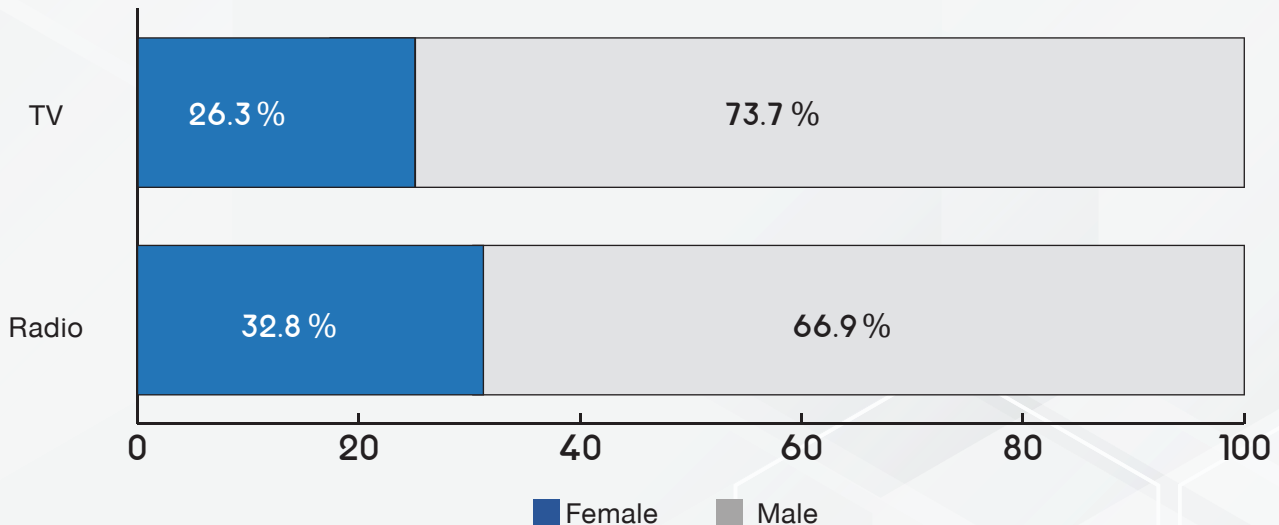


Figure 21: Media appearances TV and radio - Gender

Television, however, is more likely to feature young people than the radio. They represent 31.2% of characters appearing on television but only 21.5% of speakers on radio waves.

Media appearances on TV and Radio - Age comparison

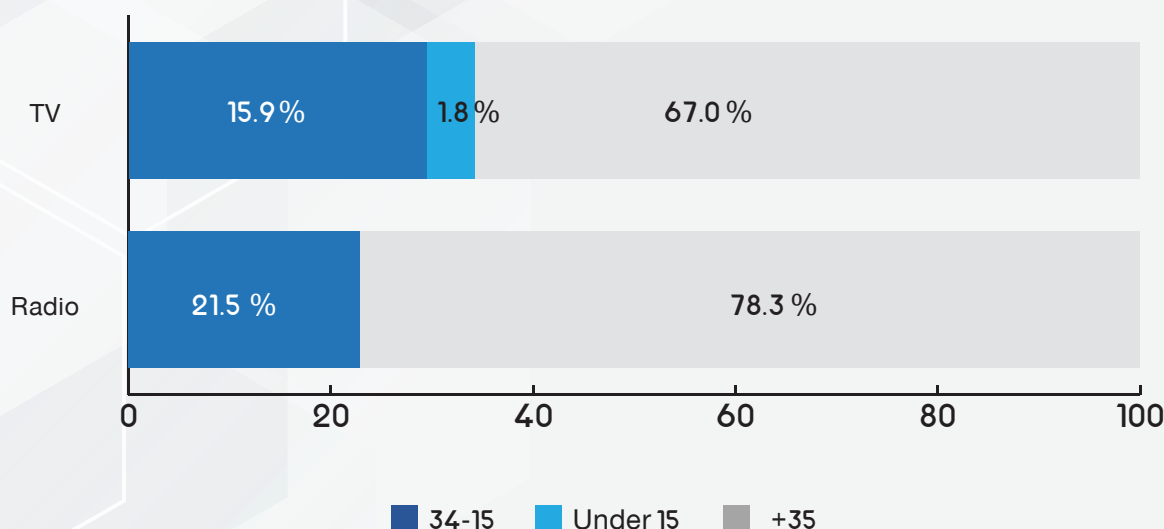


Figure 22: Media appearances on TV and Radio - Age comparison

5.1.5. YOUTH INCLUSION BY CHANNEL AND SHOW

The proportion of young characters is higher than young people's share in Tunisia's total population (33.2%) on four channels: Tounesna TV (44.5%), El Hiwar Ettounsi (42%), Attassia (36.1%), and Radio Jeunes (36.1%). Mosaique FM comes close at 31% while Zitouna FM (0%), Radio Kef (0%), Nessma TV (6.7%), Shems FM (12.2%) and Jawhara FM (12.8%) are the least youth-inclusive channels in our sample.

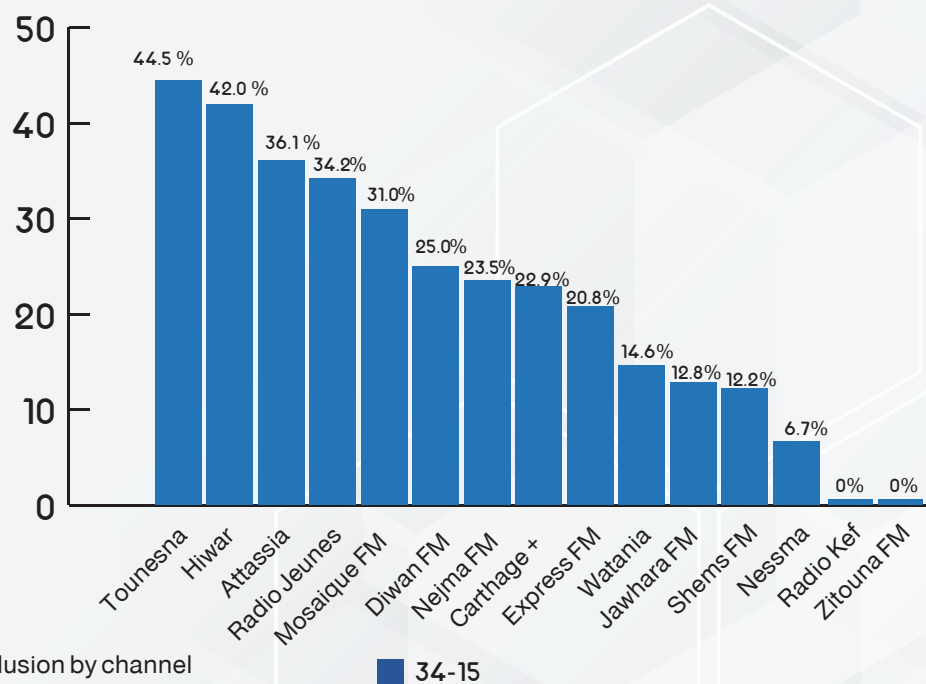


Figure 23: Youth inclusion by channel

The five most youth-inclusive shows are: Nhar Lahad Ma Yhemmek Fi Had on El Hiwar Ettounsi (88.1%), Maa Wissal ou Karim on Radio Jeunes (80%), El Matinale on Attassia TV (67.7%), Abdelli Showtime on Attassia TV (56.5%), and El Kol Fel Kol on Tounesna TV and Hkeyet Tounsia on El Hiwar Ettounsi which both feature 52.9% of young people aged 15 to 34.

Seven radio shows from our sample did not feature any young people: Zawaya Al Ahdath on Radio El Kef, Sbeh El Ward on Jawhara FM, Sabah Ajmal on Zitouna FM, Politique on Jawhara FM, Midi Show on Mosaique FM, Houna Shems on Shems FM, and El Foundou on Shems FM as well. They were followed by Wahch Echacha on Attassia TV (3.8%), the 8 O'clock News segment on Watania 1 (4.8%), Ness Nessma News on Nessma TV (6.7%), and Familia Time on Attassia TV (7.1%).



Youth inclusion by show

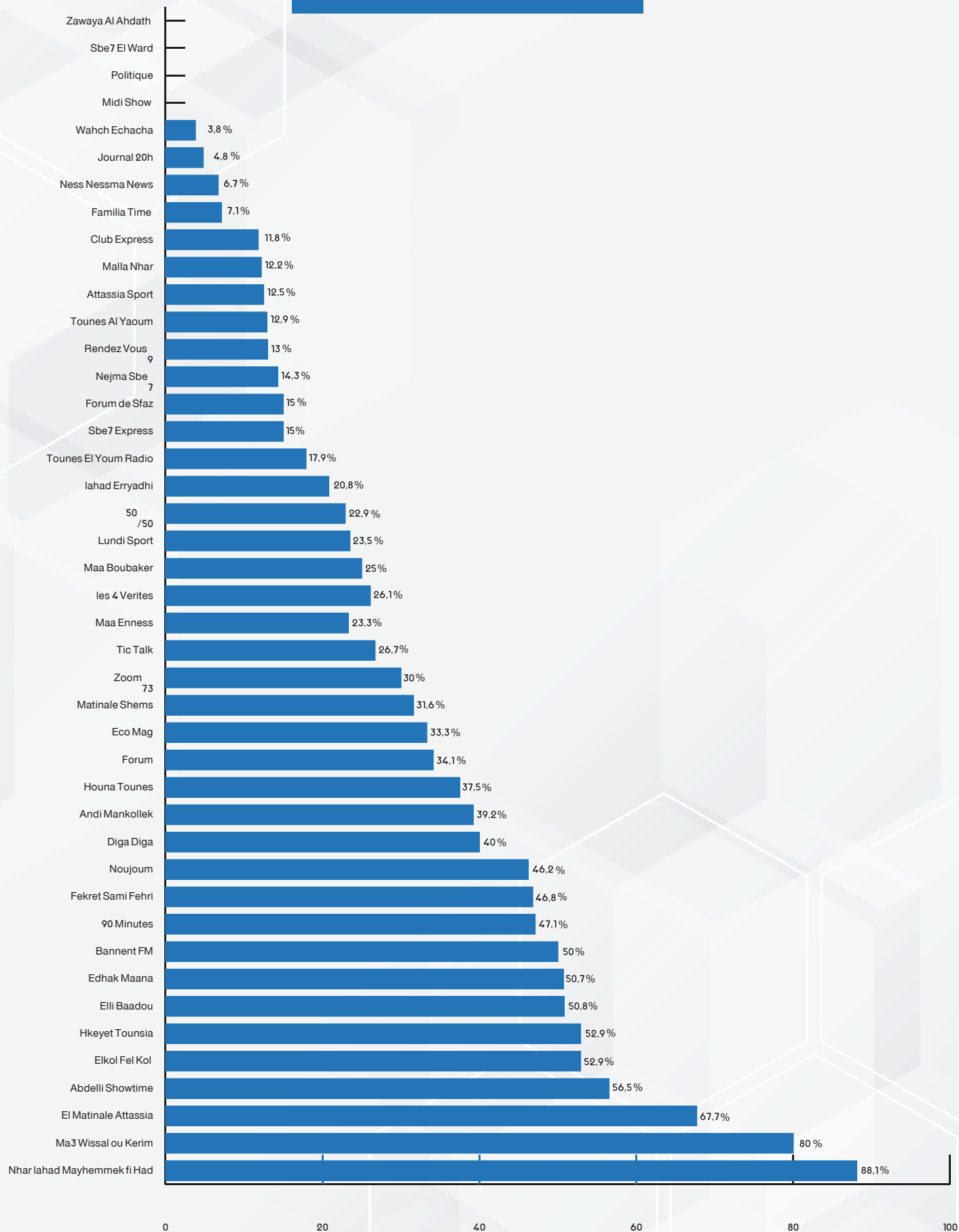


Figure 24: Youth inclusion by channel

5.1.6. WOMEN INCLUSION BY CHANNEL AND SHOW

The only two channels in our sample which did not under-represent women are Radio Kef (55.6%) and Zitouna FM (50%). They are followed by Nejma FM (41.2%), Shems FM (38.9%), and Mosaïque FM (37%). The least gender-inclusive channels are Diwan FM (11.1%), Watania 1 (16.3%), Nessma TV (16.7%), Radio Jeunes (21.1%), and Carthage + (21.6%).

Women inclusion by channel

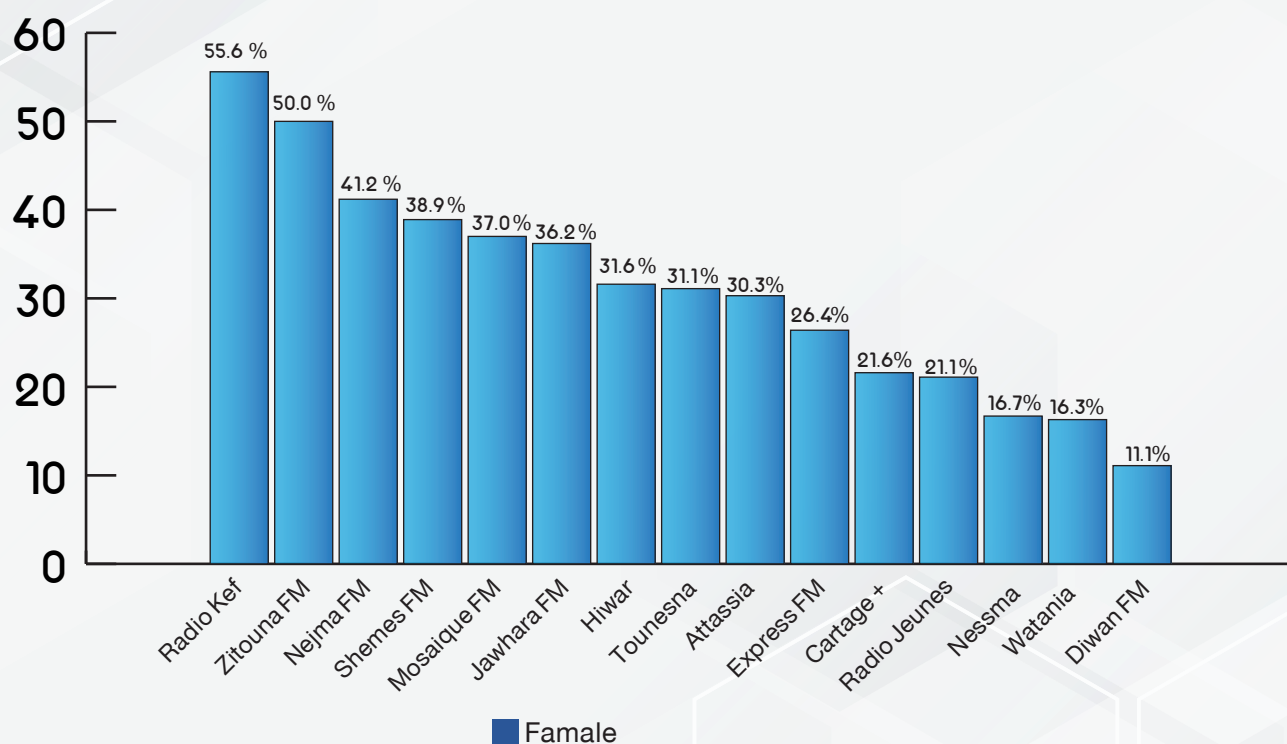


Figure 25: Women inclusion by channel

The five most gender-inclusive shows in our sample are: Maa Enness on Watania 1 (78.9%), El Matinale on Attassia TV (74.2%), Familia Time on Attassia TV (67.9%), Eco Mag on Express FM (66.7%), and Zawaya Al Ahdhath on Radio El Kef (55.6%).

The five least gender-inclusive shows in our sample are: Lahad Erryadi on Watania 1 (2.7%), Houna Tounes on Diwan FM (6.3%), Wahch Echacha on Attassia TV (7.7%), Sbeh Express on Express FM (8.3%), and Rendez-vous 9 on Attassia TV (13%).

Women inclusion by show

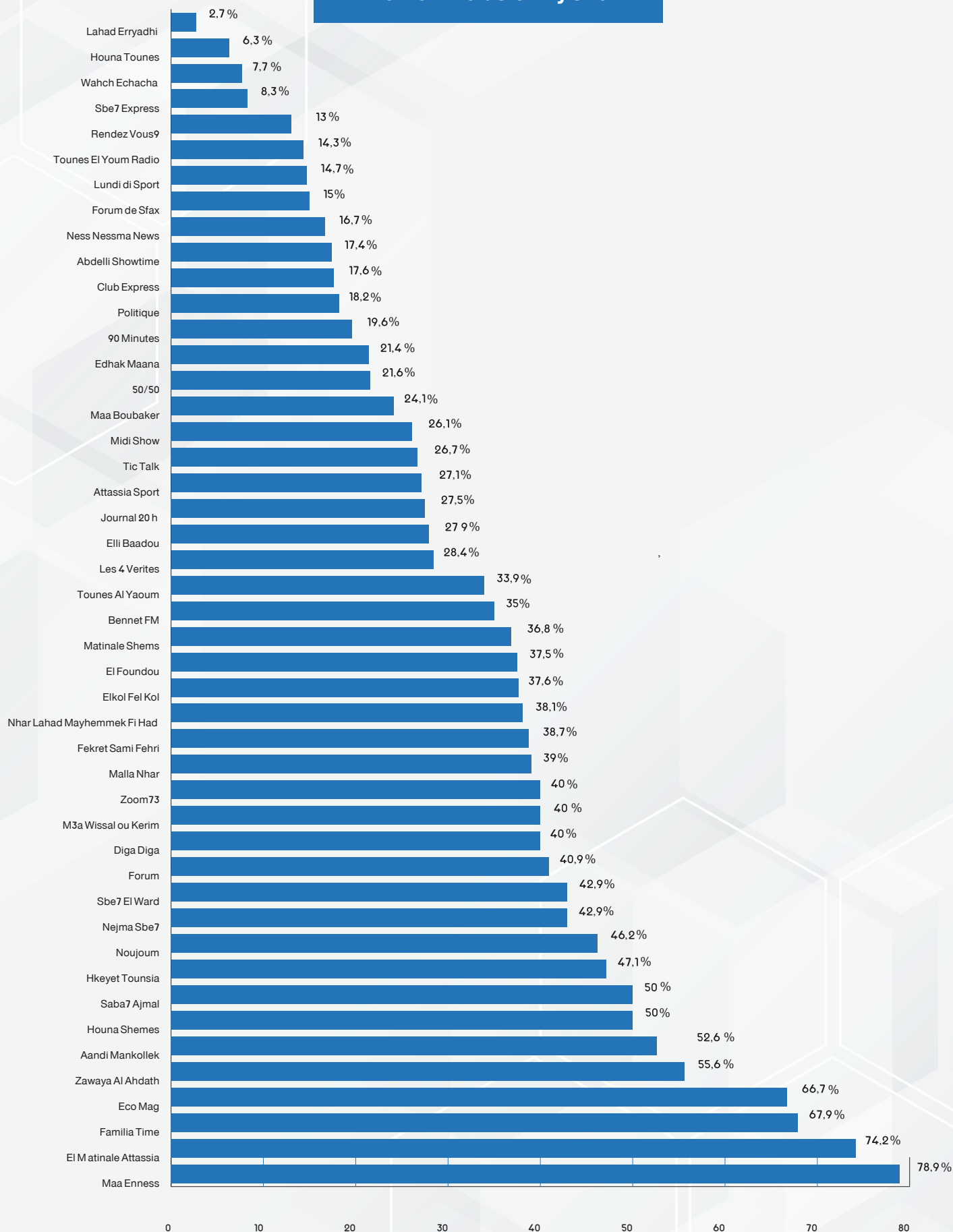


Figure 26: Women inclusion by show

5.2. TRADITIONAL MEDIA ARE MIS-REPRESENTING WOMEN AND YOUNG PEOPLE AND ARE PERPETUATING STEREOTYPES

5.2.1. WOMEN ARE MISREPRESENTED IN TRADITIONAL MEDIA

Earlier in this study, we determined that although women are under-represented in traditional media – as they represent only 27.5% of characters in our media monitoring sample – awareness of this gap does not seem to be reflected in the perceptions of young media consumers. Indeed, half of survey respondents believed that women were sufficiently represented. And although they were more likely to wish that women were more present in traditional media, a significant portion of women believe that women are sufficiently represented (40.7%).

When we asked female participants in the focus group on women's representation in the media and whether they would like to see more women on television, their answers signalled that representation is not merely a matter of volume but primarily a qualitative matter. Indeed, all participants were somewhat satisfied with the number of women appearing on television, which they saw as a secondary issue compared to the roles in which women are cast.

“There are many women on television but many women who deserve the spotlight do not appear. I would like to see talented women of culture rather than actresses and pop singers.

Real talent is often excluded.”

“Women are represented. There are many of them on TV. But their presence is not impactful because they are given superficial roles such as talking about make up.”

“The problem is not the proportion of women. The problem is the positions television puts them in and the topics women are invited to talk about.”

Media monitoring data indeed shows a gender-imbalance in the distribution of roles on traditional media channels. Women are moderately to severely under-represented across the role-categories we examined. A particularly low proportion of women was observed in the following roles, most of which are positions of power: Sportsperson (6.9%), Decision-maker (9.5%), Politician (12.6%), Activist (12.9%), and Civil Servant (16.8%).¹¹ Success stories or role models featured on television and the radio are significantly less likely to be women (27.9%). By contrast, a relatively high proportion of characters portrayed as victims are assigned to women (43.4%). We have also noted that less than a third of experts featured on traditional media are women. Even the representation of ordinary citizen is dominated by men.

Media roles by gender

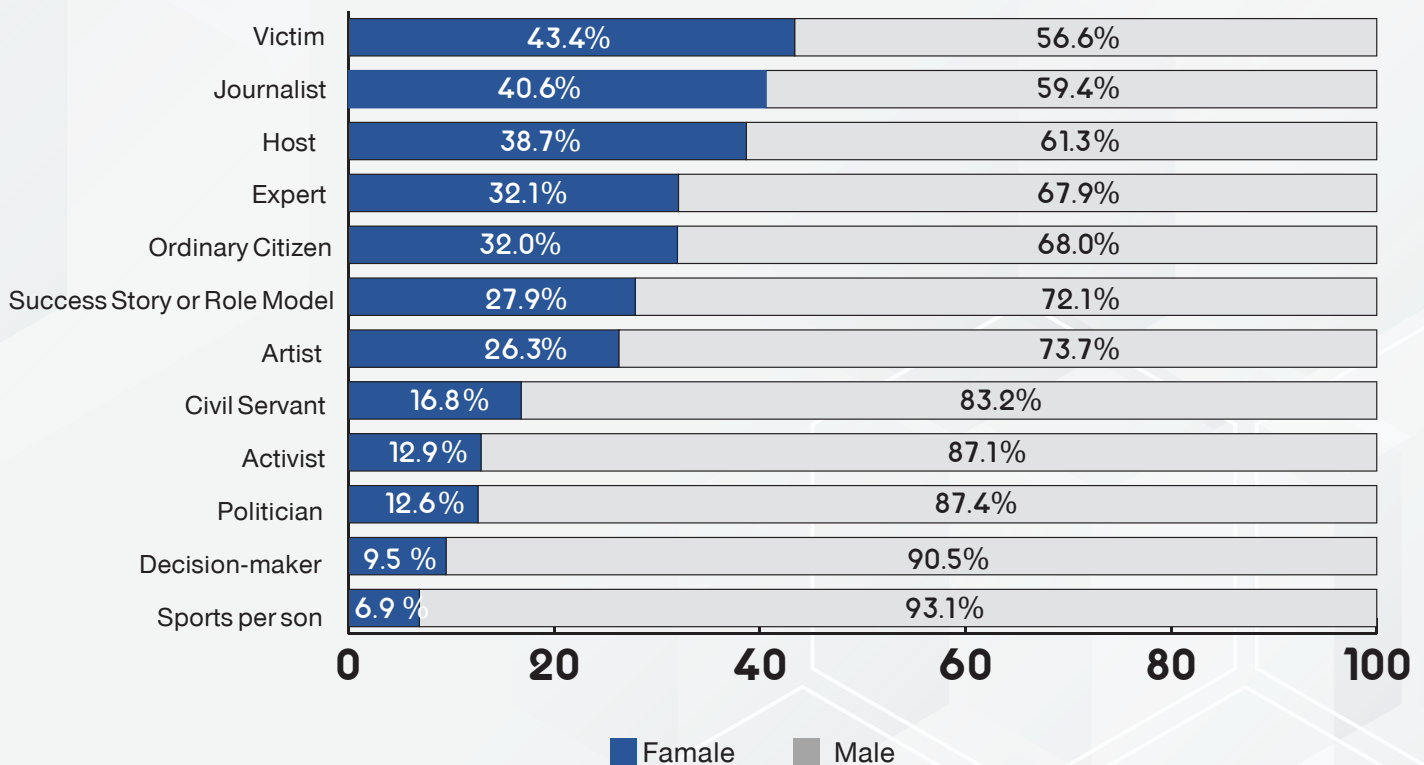


Figure 27: Media roles by gender

¹¹ See definitions given to each category in the media monitoring analytic framework in the methodology section above

Female respondents in our focus group on women's representation found the image of Tunisian women conveyed by traditional media to be largely negative, inaccurate and stereotypical. This is because of a certain bias in the distribution of roles but also because, in many respondents' view, media organisations tend to pick women who conform to the stereotypes they want to convey. Respondents' answers also indicate that they believe that the organisational logic of traditional media – be they public or private – is one of the drivers of the misrepresentation of women.

“I would like more diversity in women's representation. We see them mostly on cooking shows or superficial entertainment shows. Some Tunisian women are successful and recognised in foreign countries but are not visible on national media.”



“There are several female hosts on Watania’s news segment but they are too traditional in their way of talking... perhaps because this media itself is archaic.”

“You can find women on dancing and entertainment programmes but few women who have something to say.”

“I would like women to be in more positive positions. Instead, the media exploits them as sexual objects and uses them to distort the image of women in our society.”

“Women like Baya Zardi who appear on television are victims of themselves because they are willing to fit a stereotype. These kinds of women are misrepresenting Tunisian women. They took the easiest way to appear on television: acting like an inconsequential, frivolous woman. To get there, you need to look and sound like they want you to.”

“Women are put on TV to attract the male gaze. Women are primarily represented as a body.”

“I wouldn’t say that the women on TV do not represent at all Tunisian women. These women really exist and represent some segment of the population. But the media amplify the visibility of a certain type of women.”

“TV does not give an accurate image of women. It promotes binary representations of the extremes. On TV, you’ll see the poor and the rich but not many ordinary people. The whole Tunisian population is misrepresented. They show people and women who live on another planet and whose life and experience has nothing to do with us. Sometimes they show ordinary women, but they cast them as victims or because of their role in a sensational incident, only for buzz.”

Not only are these misrepresentations of women alienating media’s female public but are also distorting the cultural representation of women in the Tunisian society and this, in turn, influences Tunisian mentalities, from the role models young women aspire to resemble to the attitude of men towards women. Focus group participants found the representation of women on traditional media to be disempowering.

“They are giving a negative image of women to women. The image they are marketing and distributing is that of a category of women which is a minority... spending a lot, caring excessively about their appearance. This lets the ordinary woman completely left out from representations.”

“In the 1990s, the Tunisian woman was a model which was revered and respected not only in Tunisia but also in the rest of the Arab world. The Tunisian woman was seen as aware, smart, and educated. But the Tunisian woman’s image has changed due to the negative influence of archetypes that are shallow and promoted by television.”

“The positive side is neglected. Achievements of Tunisian women are negated. Women are used to advertise products and brands. Instead, I’d like to see scientific shows for example hosted by women or shows that deal with issues which are important to Tunisian women.”

5.2.2. The young people who are cast on television and radio are not representative

Earlier in this study, we determined that, unlike women, young people are not under-represented in traditional media: their share in television and radio appearances (29.4%) nearly matches their share in the country’s total population (33.2%). Yet, the young people we surveyed overwhelmingly believe that youth is not sufficiently represented (78.8%).

We also found that 73.8% of survey respondents believed that the young people who appear on traditional media platforms do not truly represent Tunisian youth.

Do the young people who appear on traditional media platforms truly represent Tunisian youth?

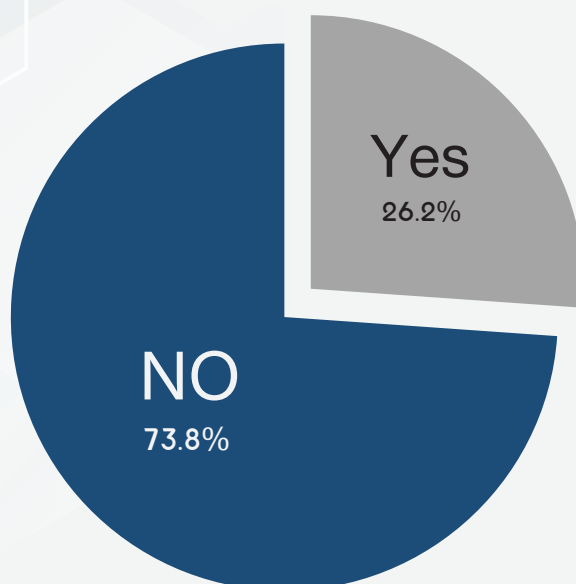


Figure 28: Opinion on youth's representation

Media monitoring data also shows that young people are not evenly distributed across media roles. Young people are over-represented in certain roles, most notably Success Stories or Role Models which is, arguably, the most positive media role in this study's analytical framework. The fact that this category is largely dominated by young people (74.4%) raises questions about their dissatisfaction with the way in which traditional media portrays them.

One possible answer might be that casting young people is driven by tokenism which is the inclusion of an under-represented group in a symbolic effort to make a story or show seem diverse but in a way that may be neither meaningful nor effective. "Tokenism is likely to be found wherever a dominant group is under pressure to share privilege, power, or other desirable commodities with a group which is excluded."¹² This might also explain why young people are more easily cast as sportspeople or as pop artists but are severely under-represented in all roles which correspond with a position of power: Civil servant (0.8%), Politician (2%), Decision-maker (4.5%), and Expert (14.9%).

¹² Laws, Judith Long, "The psychology of tokenism: An analysis," *Sex roles* 1, no. 1 (1975), p. 51.

They are also under-represented in the Activist category, which is a role through which they can voice their generational concerns and grievances. Indeed, even though they do appear on television and radio, young people tend to be cast in roles in which they may not seriously challenge the dominant order.

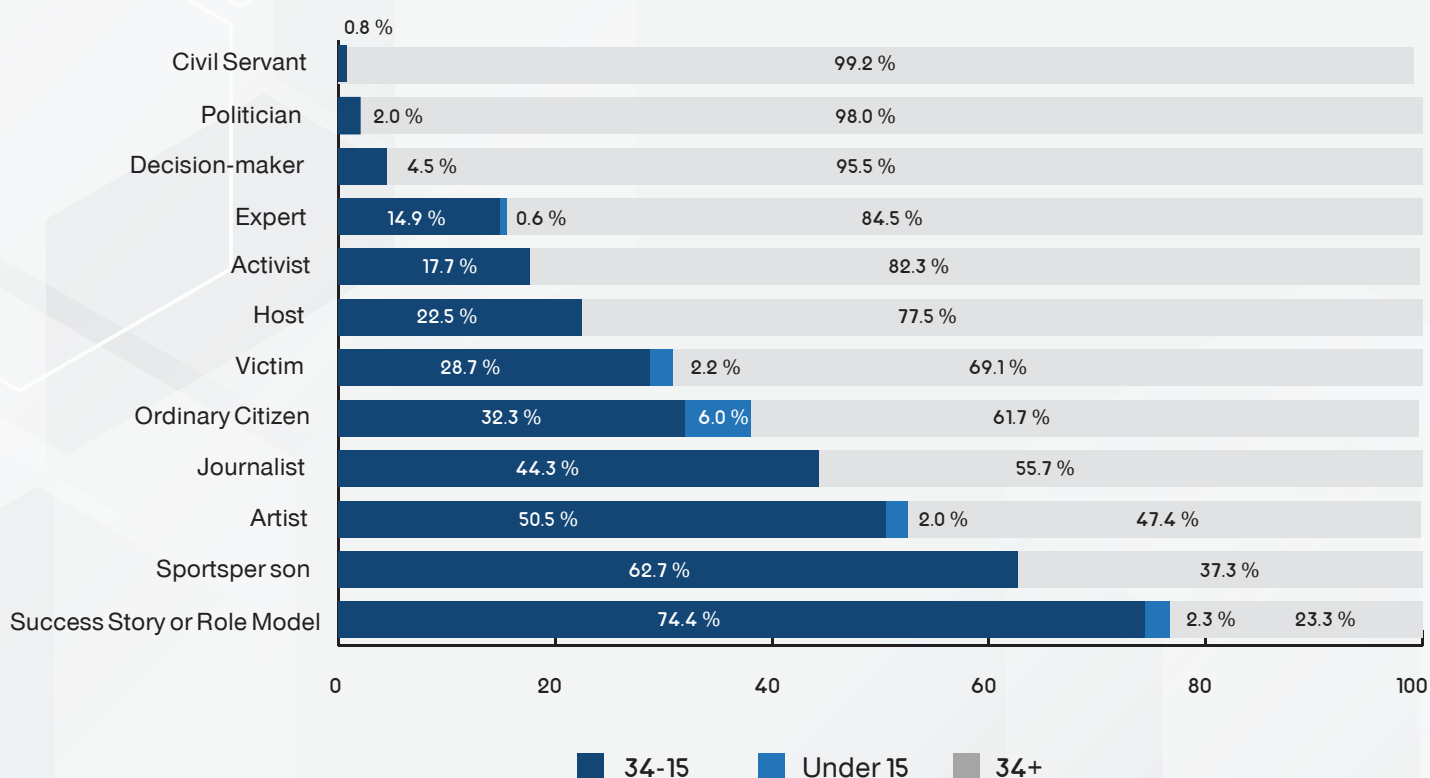


Figure 29: Character role of youth by age category

Focus group discussions about the representation of young people in traditional media reveal that young people's grievances don't relate to the number of young people who are cast on television and the radio as much as the quality of their representation. Like women, young focus group participants unanimously believed that traditional media systematically misrepresent their generation, reinforce stereotypes, and are only inclusive of young people who validate or are willing to fit into stereotypes.

“When they invite artists, it’s based on their online views, not the quality of their art. In vox pops (micro-trottoirs) with young people they edit out the good answers and only show the stupid answers to reinforce stereotypes and turn us into a laughingstock.” – Participant (Teenagers focus group)

“The media does not carry our voices. Not just our voices... everybody’s voices. And if a young person is given the opportunity to appear on TV, they will not defend us. Because TV chooses the kind of young people who are likely to hurt our generation’s reputation.” – Participant (Teenagers focus group)

These hypotheses were confirmed in another focus group discussion with young alternative media professionals and digital content creators. Responses by young media professionals who worked in traditional media before migrating to alternative media were particularly illuminating.

“When you work for a television, you are put on a track. You are not free and they don’t let you express yourself. They choose specific types of people to represent youth. Young people who appear on television face a lot of pressure. If you are invited to the television, they will put you in a mold that will automatically prevent you from being genuine and from truly representing young people.” – Participant, Former TV Comedian & Vlogger (Content creators focus group)

“Television does not want young people to be representative. I worked in production... They want to put young people in very specific roles or force them to adopt personas. They create these personas to reach a specific audience. For them, young people are simply a tool to reach specific audiences. Roles which are common: the lame comedian (masset) and the troublemaker/hooligan. Even behind the camera, young people will be in lower positions. For example, an assistant but never in creative roles. When I worked for a television channel, I felt like I was a scribe. They give you the idea, and you just have to execute it. But in the digital world you have total creative freedom.” – Participant, Former TV Production Assistant & (Content creators focus group)

“Mainstream media amplify the personality of the young people they invite to turn them into caricatures. For example, an academically successful person will be portrayed as a nerd. The personas they create do not map onto reality.” – Participant, YouTube Showrunner (Content creators focus group)

“The question of representativeness on TV does not only concern young people but society as a whole. They represent society as it is imagined by economic and cultural elites. And their map of the country’s reality does not match people’s reality.” - Participant, YouTube Showrunner (Content creators focus group)

Interestingly, even though our media monitoring data suggests that the proportion of young people is greater on television compared to the radio, several focus group respondents believe that radio is more inclusive. Their answers suggest that they judge media inclusiveness primarily from a qualitative rather than quantitative point of view. Their answers also suggest that the space given by radio to young people is freer, albeit smaller than television.

“Television is autistic. They focus on problems that do not concern us. Radio is a bit more inclusive of youth. Television does not welcome young people who want to talk about their problems but radio is more open.” – Participant (General focus group)

“Radio is more inclusive. They sometimes highlight success stories of young people.” Participant (General focus group)

Focus group participants also raised the issue of the role economic incentives on the advertising market may have on youth representations in traditional media.

They indeed believe that young people are not represented enough because they are viewed as commercially uninteresting by advertisers who would rather target more well-off older adults. Young people nonetheless represent one third of the country’s population and, even though their purchasing power may be lower than that of older adults, they are indeed consumers. It is unclear whether media producers and advertisers fail to see potential in youth markets or whether they are simply risk-averse.

“Youth-centric shows are less marketable from an advertising point of view. When you propose a new concept, the first question a producer asks you is how you are going to monetise your show. My team and I had to volunteer to work free of charge to convince our radio to let us launch a show on women and youth issues.” – Participant, Former radio journalist (General population focus group)

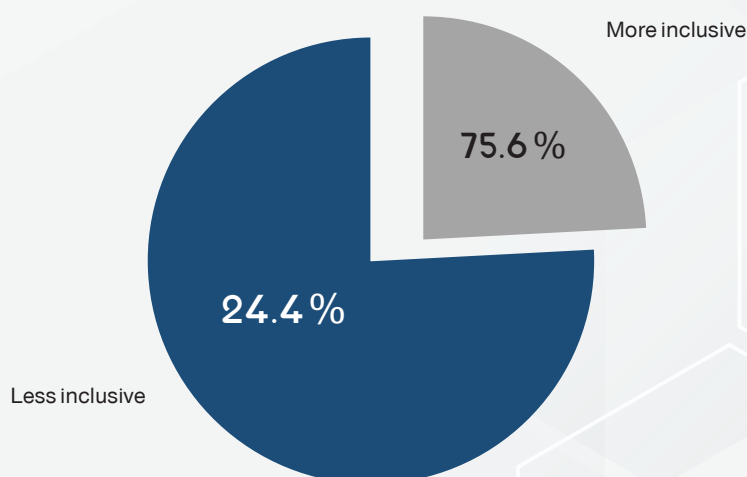
“Radio and TV are profit-driven. Young people’s purchasing power dictates the extent to which they are featured because of the advertising-centric business model of privately-owned media. One possible solution for young people is to use crowdfunding to launch their own media.” – Participant (General population focus group)

5.3. YOUNG PEOPLE BELIEVE THAT ALTERNATIVE MEDIA ARE MORE INCLUSIVE

5.3.1. ALTERNATIVE MEDIA ARE MORE INCLUSIVE OF WOMEN

75.6% of survey respondents believe that alternative media are more inclusive of women.

Are alternative media more inclusive of women than traditional media?



When asked whether they thought that digital alternative media were more likely to give women more space to express themselves, participants of the women’s focus group discussion were positive.

Figure 30: Opinion on women's inclusion in traditional media

“Traditional media overlook women. There are women whose only outlet is YouTube, Facebook or Instagram because they cannot access television studio floors (plateaux). Social media is helping them, and they are seizing this space on their own.” – Participant (Women’s focus group)

“A lot of women have taken advantage of social media to break the stereotypes propagated by traditional media.” – Participant (Women’s focus group)

“Social media is an opportunity for those who can’t get on TV or the radio. On social media, you can freely present your product, be it a book, a song or a business. And you are free to follow who you want. This space is diverse enough to accommodate any woman’s interests.” – Participant (Women’s focus group)

“Social media represents an opportunity for women to express themselves. For example, for female entrepreneurs, it’s easier to market your products on social media. There is also a group of female writers who publish fiction on Facebook.” – Participant (Women’s focus group)

However, many women felt that female content creators who are active on social media were not all representative of Tunisian women. The most visible female digital influencers are not dissimilar to the stereotypes seen on television according to focus group participants who wish that more talented young women were more visible.

“Social media gives a lot of opportunities, but many women are not taking advantage of this space.” – Participant (Women’s focus group)

“I never saw a woman on social media who is talking about important issues or innovating... except perhaps in politics. Female content creators are always looking to make some money, so they are sticking to the stereotypes advertisers like.” – Participant (Women’s focus group)

“There are women who do shallow stuff on social media, and they are the ones who are later invited to television.” – Participant (Women’s focus group)

5.3.2. ALTERNATIVE MEDIA ARE MORE INCLUSIVE OF YOUTH

88.2 % of survey respondents believe that alternative media are more inclusive of young people.

Are alternative media more inclusive of young people than traditional media?

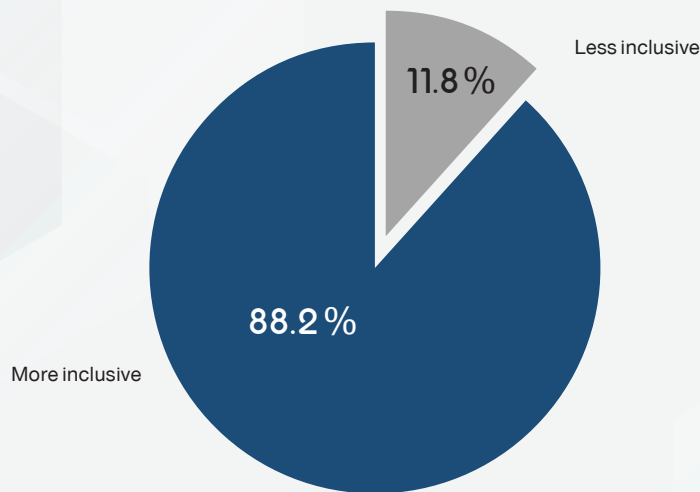


Figure 31: Opinion on inclusion of young people in both media

Focus group discussions show that young people perceive social media platforms as more accessible and freer and see them as pathways to bypass the dominance of traditional media.

“YouTube has allowed the emergence of alternative media without the bureaucratic pathway of regulations and permits you need to go through in order to create a traditional media in Tunisia. Content in this digital space is still primitive but there are interesting attempts to do high-quality content.” – Participant (General focus group)

“Facebook and Twitter have led to the emergence of young influencers who have more clout than journalists from traditional media and who have more influence on public opinion.” – Participant (General focus group)

“A lot of young people became famous on social media which provided them with a platform. But television has tried to co-opt these Internet personalities. But even if you’re rejected by the media, on the Internet you can always make your voice heard.” – Participant (General focus group)

6. THE FUTURE OF TUNISIAN MEDIA

6.1. NO FUTURE FOR TRADITIONAL MEDIA?

The majority of survey respondents don't think that traditional media has a future.

Do you think traditional media have a future with your generation?

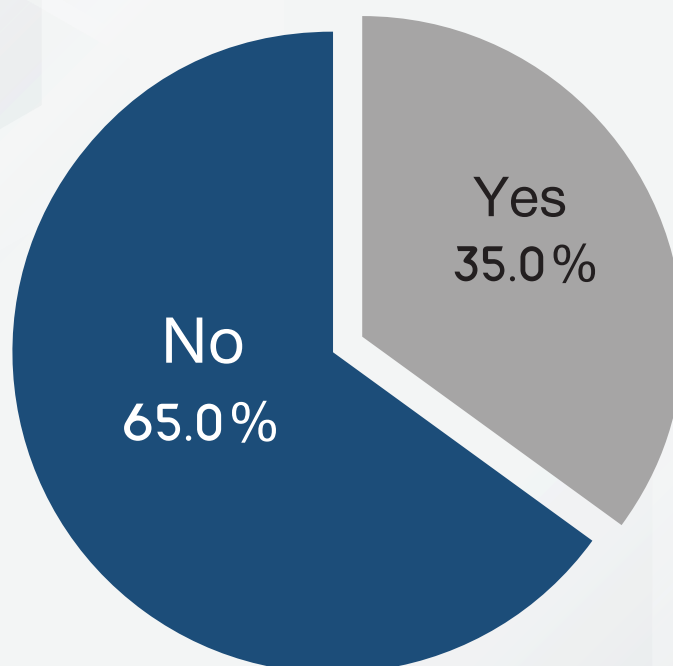


Figure 32: Opinion of traditional media perspectives

This rate reaches 73.3% in the Greater Tunis and stands above 59% in all other regions except in the north-west of the country. In the two north-western regions, a majority of young people believe that traditional media still has a future: 55.4% in Jendouba and 73.1% in El Kef. It remains unclear why young people in these two regions are more conservative with regard to the future of alternative media. One focus group participant from El Kef pointed out lower Internet access to explain this discrepancy. This might indeed be a contributing factor given that those two regions' Internet access rate is lower than the national mean.¹³

¹³ INS, Résultats du recensement 2014 par gouvernorats et délégations, Vol 2, 2014.

Generation Z is more likely than Millennials to believe that traditional media does not have a future. 70.5% of respondents aged 19-25, 66.1% of respondents aged 15-18, and 54.1% of respondents aged 26-34 do not envision a future for traditional media. One hypothesis is that people in the youngest age bracket may be more likely to believe that alternative media has a future than those aged 19-25 because they are still living in the family cell where they are more exposed to the television. But teenagers who participated in our focus group firmly believe that Internet is going to replace television for their generation while also believing that traditional media will survive because there will be demand for them among older generations.

“TV will soon be obsolete but it will not disappear.” – Participant (Teenagers focus group)

“Because all information is available on the Internet, we don’t need TV anymore. But it won’t disappear because older generations still watch it.” – Participant (Teenagers focus group)

“For most of us Internet will replace television, but in some rural regions they don’t have good Internet access and are stuck with TV.” – Participant (Teenagers focus group)

Study level also seems to influence respondents’ views regarding the future of traditional media. Indeed, while the majority of secondary (60.5%) and higher education graduates (69.3%) don’t believe that traditional media has a future, the majority of those with lower education levels believe that traditional media does have a future

Young alternative media professionals who participated in our focus group largely believe that traditional media are facing an existential threat. However, they acknowledge that traditional media are aware of the risk of obsolescence and are starting to deploy strategies to adapt to the new media environment, with varying degrees of success. One of these strategies consists in co-opting digital content creators and influencers in order to capture their audience.

“Traditional media are now publishing their content on YouTube and social media. They are questioning their models and are increasingly aligning with digital media practices. They are not convinced anymore that their model is viable and they see that their followers prefer digital platforms to their TV and radio sets. They are afraid of digital media.” – Participant, Former TV Production Assistant and YouTube content creator (Content creators focus group)

“In the mid-term, I think that traditional media will survive, because that’s still where the money is. But older generations are increasingly consuming digital media. The press is dead. Even the radio will be replaced by podcasts. The on-demand content model will kill broadcasting. Freedom to choose is very important to our generation. And the public is more fragmented and different audiences want more tailored content. For now, advertising money goes to television because people with purchasing power are older and watch television, but when purchasing power is transferred to younger generations, money will follow them into the digital space.” – Participant, YouTube Showrunner (Content creators focus group)

“Media brands are going to survive, but the consumption model will change. Tunisian TV is like porn: everybody watches it but nobody admits to this. But at the same time, the gap in advertising budgets is closing, and television is starting to adapt. And it makes sense to adapt to the digital world when you see that YouTube metrics are more precise than Sigma Conseil’s television ratings. Bila Kinaa is a successful digital product, and it has been bought by a television. Nouba was the most watched show in Ramadan on Youtube, but on television this show was ranked 10th. Media outlets need to acknowledge these new realities.” – Participant, Creative Director of a Digital Media (Content creators focus group)

“Television as a channel of communication is dead. The fact that television’s main distribution platform is now YouTube is a key indicator. But traditional media can transition into the digital world. Yet, most of them are not engaging in this transition and are in denial. Keeping the same model does not make any sense when you know that costs of production are much higher on television than on YouTube but with much lower benefits in terms of audience.” – Participant, YouTube Showrunner (Content creators focus group)

6.2. THE SPACE IS OPEN FOR THE EMERGENCE OF ALTERNATIVES

A majority of 86.5% of the young people who answered our survey believe that alternative media can compete with traditional media.

Can alternative media compete with traditional media?

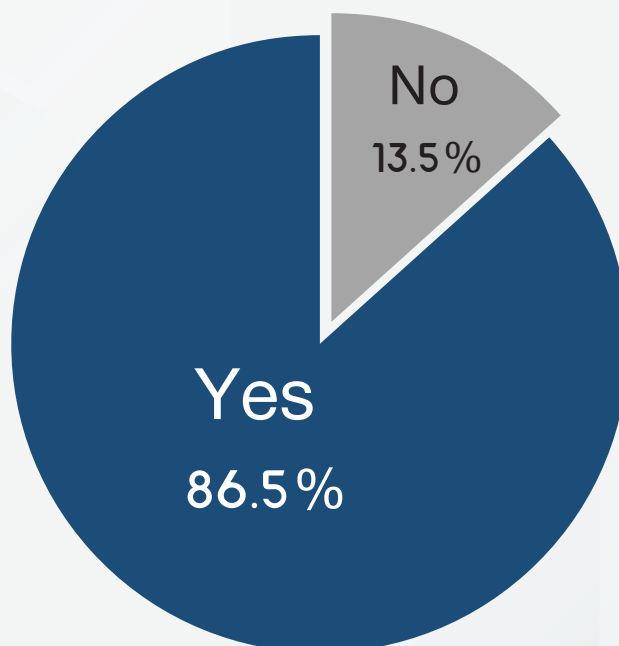


Figure 33: Opinion on alternative media competitiveness

All the factors observed in this study combine to boost the potential of digital alternative media as a powerful space for young people's self-representation.

The opportunities offered by the digital world are being seized by a growing number of content creators, some of whom feature among young people's most trusted sources of information while the credibility of mainstream media is dwindling.

The openness of the digital space, especially social media platforms, allows young people to bypass the barriers to entry into the media space: regulatory barriers to the profession of journalism, regulatory barriers to the creation of a media, prohibitive costs of production, vested interests, norms and incentives constraining content creators' freedom of expression etc.

The balance of power is gradually tilting toward alternative media. A successful content creator who worked with television explained that, years ago, when he started his YouTube channel, he merely saw his digital platform as a “springboard to television.” “I wanted YouTube to make me famous enough to be invited to television shows. Now that I’ve been there, and that the digital space has evolved, I see that I can succeed in the digital world without ever returning to traditional media” he told us.

Another signal of the reversal of the balance of power is traditional medias’ recent attempts to piggyback on digital influencers in order to capture their audience by co-opting them.

“Television and the radio are now trying to invite digital influencers to their shows. They want to capture the audience of digital influencers. They believe that bringing these people would transfer their audience. But it failed although these influencers have a huge digital audience. The thing is, those who watch streams on Twitch or shows on YouTube are not ready to follow their influencer on TV or the radio.” – Participant, Creative Director of a Digital Media (Content creators focus group)

But even though digital content creation in Tunisia is booming, the digital media space is still dominated by individual content creators – often amateurs – who have been able to cater to the needs of niche audiences which are increasingly fragmented.

Only a small number of alternative media organisations which may have the ability to compete with traditional media have emerged so far. To name a few:

- Nawaat and Inkyfada focus on investigative journalism and are often viewed by young people as elitist but are in the process of refreshing their content by creating high-quality content on YouTube and pioneering local podcast production, respectively;
- Boubli is a youth-led media which is disrupting norms and breaking taboos on YouTube while also training and mentoring a new generation of content creators;
- Faza and Look are emerging as Facebook-based mainstream media. They are offering increasingly rich and original content such as web series and are increasingly able to attract corporate sponsors.

“There aren’t many digital media like Boubli and Nawaat. There should be more digital media which could host young people’s creative energy. Otherwise, you’re on your own.” – Participant, YouTube content creator (Content creators focus group)

However, young people are still facing many obstacles to succeed in digital mass-communication, including:

- Digital media organizations offering young content creators’ opportunities to scale-up their impact;
- Access to digital production equipment remains difficult despite its relatively low cost (compared to television/radio production equipment);
- Access to training and mentoring;
- Content creation careers are not perceived as viable;
- A growing culture of online bullying which may discourage aspiring content creators;
- An archaic legal and regulatory framework constraining the creation of creative enterprises and the production of digital content.

“Means of production are a key obstacle. Fans who have contacted me would like to create content on their own, but their main problem is access to equipment. Cultural centers don’t have proper equipment and when they do, they deny access to most young people. Young content creators also lack access to mentors and advisors... people who can give them constructive feedback. Qualitative feedback is important for the development of a channel. Training is also important. An environment which is favorable to creativity, unlike the television industry, is important too. There’s also a problem of mentality: producing content in Tunis is seen as trendy but, in some regions, it is frowned upon.” – Participant, Community manager in a digital media (Content creators focus group)

“People from Tataouine have contacted me, telling me that in their region the mentality goes against digital creation. Attacks and criticism and lack of recognition are a major obstacle pushing young content creators to stay in their comfort zone.” – Participant, YouTube content creator (Content creators focus group)

“Mentality is an important obstacle. Equipment is not such a big problem because it is possible to succeed with just a smartphone, even though it’s not ideal. Many artists have given up because of mockery (tanbir), but those who have a good support system have continued to grow. We need to give more recognition to digital professions and boost the confidence of content creators. There’s a culture of mockery and criticism which needs to be uprooted. And of course, monetization of digital content is difficult in Tunisia because we don’t have a convertible currency and we are denied access to PayPal.” – Participant, YouTube Showrunner (Content creators focus group)

“Audio-visual production equipment is over-taxed, and the Tunisian Dinar is weak, which makes the cost of equipment excessive. The Internet infrastructure is also weak. In Morocco for example, the ADSL bandwidth is symmetrical: the upload speeds are the same as download speeds. But in Tunisia the industry, assuming that Tunisians would be passive consumers rather than creators of digital content, opted for a strong download bandwidth but a weak upload bandwidth. Slow upload speeds do not allow you to livestream for example.” – Participant, Creative director of a digital media (Content creators focus group)

The process for obtaining a filming authorisation is particularly complicated:

“We are required to hold a filming permit to shoot any video in the street. The conditions for an alternative media or a civil society organization to obtain a filming permit are vague and unclear. The size of the filming crew is limited to five people per permit or so we were told. Even cinema students need a permit. And those permits have a limited duration and need to be regularly renewed through a Kafkaesque administrative process. On top of that, the administration takes a lot of time to process requests, especially if you are not willing to bribe them. For a digital media it is an exhausting waste of time. Moreover, holding a professional card is often the condition to obtain these filming permits and the criteria for getting one of those cards are set by commissions which are dominated by the traditional media who want to exclude us. And the nomenclature of professions does not make any sense from a digital media perspective. Alternative media have blurred the boundaries between different jobs. A content creator is often an editor, a cameraman, an actor, a producer, a director, a journalist, and a citizen at the same time. For which professional card should we apply?” – Participant, Director of a digital media (Content creators focus group)

Despite these obstacles, the digital realm offers the strongest alternatives to traditional media because it allows the ownership of the means of media production by young people and allows them to shape the governance of new youth-inclusive media.

6.3. MOST YOUNG PEOPLE BELIEVE THAT TRADITIONAL MEDIA REFORM IS A DEAD END

We concluded the survey by asking respondents to pick between two options: “If you had funds and influence, would you rather invest in the reform of traditional media or in developing youth-led alternative media?” A majority of 57.8% of young people opted for investment in alternative media.

If you had funds and influence, would you rather invest in the reform of traditional media or in developing youth-led alternative media?

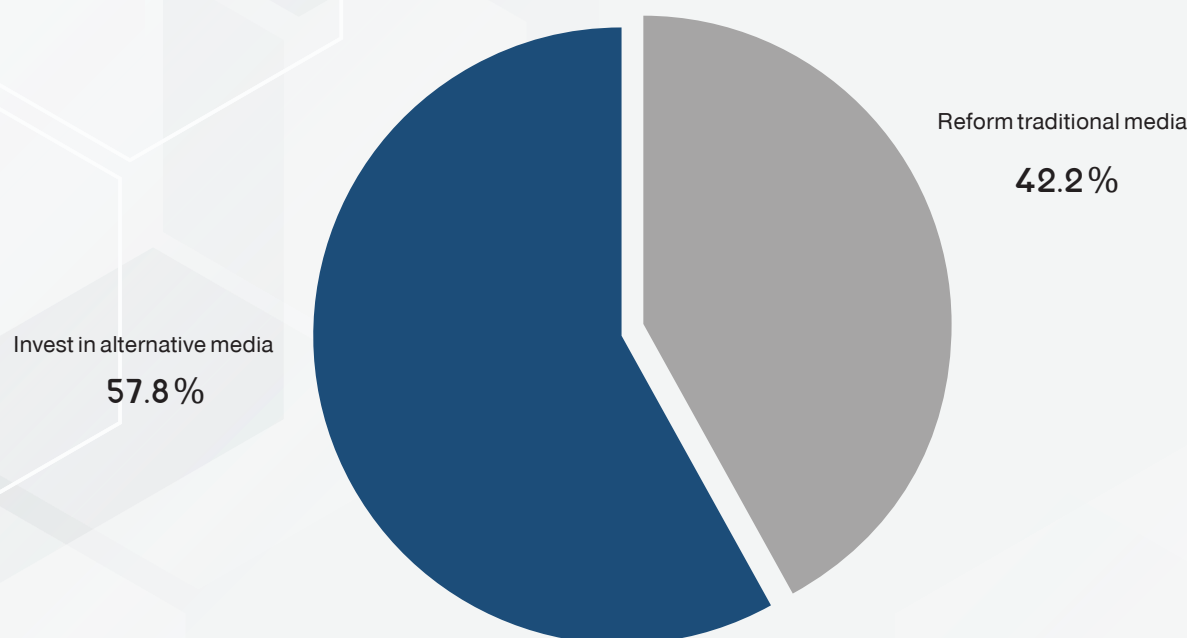


Figure 34: Opinion on whether to reform traditional media or develop alternative media

This figure reaches 66.8% among teenagers aged 15-19. But a majority of Millennials aged 26-34 is more conservative and would rather invest in traditional media reform (52.5%).

“I would invest in alternative media. Traditional media would take the money but they are bound to return to their profit-driven approaches. Investing in them to make them more inclusive is not sustainable.” – Participant (General focus group)

“Alternative media are more promising, but television has such a negative impact on society, for example by promoting rape culture, that we need to do something about it. That’s why I would invest in traditional media reform.” – Participant (General focus group)

“I would invest in alternative media by providing resources to content creators who are struggling. I would not influence them or impose constraints.” – Participant (Teenagers focus group)

“I would choose alternative media because youth is neglected. Even if they are given more resources, mainstream media will not change. They will keep stereotyping youth and producing shallow content. From what I see on YouTube, young people are more likely to create educational content.” – Participant (Teenagers focus group)

“I’d bet on alternative media because social media are closer to young people. And people in general will eventually move on from traditional media. Only a minority will stick to traditional media. So, I would help create shows on the Internet. I would help young people by giving them equipment and resources to compete with TV. But I would also help young people appear on television.” – Participant (Teenagers focus group)

“I’d like to invest in both. It’s important to integrate young people in traditional media in order to diversify the content but also to help them communicate with the older generations who are not in the digital world. But if I had to choose, I’d pick alternative media. I would provide equipment and resources. I would open access to PayPal and facilitate administrative procedures.” – Participant (Teenagers focus group)

“I would support alternative media by young people. I believe that traditional media are not repairable. They do not produce anything valuable, and they are all either shallow or political. There is no cure for them. We do not have a choice” – Participant (Women’s focus group)

In focus groups, participants provided few compelling reasons to pick traditional media reform over youth-led alternative media. First, the reform pathway is privileged from a damage control perspective: traditional media has such a negative impact on society that they ought to be dealt with and repaired. Second, traditional media remains the main channel through which young people are presented to the older generations: if one wants to improve older adults’ perception of young people, traditional media reform is inevitable. However, many focus groups participants have produced compelling arguments to the effect that traditional media reform is an impasse and that alternative media provides a more viable pathway for the empowerment of young people.

Our focus group discussion with young media professionals and digital content creators suggests that, rather counterintuitively, the best pathway to reform traditional media might be the investment in the development of an alternative media ecosystem. Indeed, traditional media's business model is being threatened by digital content creation. Traditional media is therefore attentive to developments in this space and are trying to adapt to the new media environment by emulating trends in digital media and by co-opting digital influencers. By investing in alternative media and by empowering digital media to compete with traditional media one may create a powerful incentive for traditional outlets to change.

“Television is bringing in young people who are successful in the digital space, YouTubers or Instagrammers. When they invite them, they try to force them into a mould. But by doing that, traditional media is unwittingly accelerating its transformation. These young digital content creators are exerting a pressure on television standards which will gradually mirror digital norms.” – Participant, Creative director of a digital media (Content creators focus group)

7. POLICY RECOMMENDATIONS

7.1 FOR THE GOVERNMENT OF TUNISIA

- Acknowledge the emergence of digital alternative media and the obsolescence of administrative barriers to entry into the media space and into media production professions by:
 - Developing regulatory and collective bargaining frameworks which recognise the status of independent alternative media and individual digital content creators;
 - Including independent alternative media and individual content creators in decision-making processes relating to media policies and the governance of the media sector;
 - Refrain from enabling corporatist or monopolist strategies pursued by traditional media owners and professional bodies;
 - Deregulating access to media and audio-visual production professions or granting content creators professional cards, including press cards, based on revised criteria which reflect the evolution of the digital media landscape;
 - Exempting digital media and individual content creators from the requirement to obtain a filming permit or clarifying and easing the conditions for the obtention of filming permits by individuals, small businesses and civil society organizations;
- Provide young people with access to audio-visual production resources by adequately equipping Youth and Cultural Centers;
- Develop regulatory frameworks which facilitate the monetization of digital media content, and content creators' access to the formal economy;
- Ease the conditions of access to online payment and crowdfunding solutions, including access to foreign currency (e.g. by authorizing PayPal);

- Abolish Tunisie Telecom's monopoly over Internet infrastructure in order to stimulate competition, investment in infrastructure and improvement in the quality of services
- Promote access to higher upload bandwidth;
- Reduce import duties and other taxes on cameras and other audio-visual production equipment which are currently taxed as luxury products.

7.2. For broadcasters

- Involve representatives of young people in the governance of public media, for example through the creation of a youth council within public media establishments or by including youth representatives in public media's supervisory bodies;
- Increase the proportion of women and young people appearing in radio and television shows;
- Refrain from perpetuating stereotypes, notably by portraying young people as troublemakers and by excluding women and young people power-roles (e.g. experts).

7.3. For international donors

- Acknowledge the limitations of the traditional media reform agenda and increase investment in alternative media ecosystem and the creative economy. Specifically:
 - Invest in the creation of support systems which provide aspiring content creators with access to capacity-building and mentoring, especially outside the Greater Tunis;
 - Contribute to further breaking barriers to entry into media production for amateur content creators by making audio-visual equipment more available, especially in the South and interior regions;
 - Financially support youth-led alternative media operating in the digital space;
 - Support civil society or social enterprise initiatives to mutualize alternative media resources and generate economies of scale;

- Redirect communication and visibility budgets of youth programs away from traditional public relations (press, television, radio) and place more sponsored content in alternative media.

Appendix I – Media monitoring sample

Media type	Ownership ¹⁴	Channel	Show
TV	Public	Watania	Lahad Er-Riadhi
			Evening News
			Maa Enness
	Private	Attassia	Ed'hak Maana
			Abdelli Showtime
			Aandi Ma Nqollek
			Maa Boubaker
			Familia Time
			Matinale
			Rendez-vous 9

Media type	Ownership	Channel	Show
TV	Private	Attassia	Attassia Sport
			Wahch Ech-Chaha
	Private	Carthage +	50/50
	Private	El Hiwar Ettounsi	Minutes 90
			Fekret Sami Fehri
			Hkeyet Tounsia
			Elli Baadou
			Nhar Lahad Ma Yhemmek Fi Had
			Les 4 Vérités
			Tounes Al Yaoum
	Private	Nessma	Ness Nessma News
	Private	Tounesna	Wahch Ech-Chacha
			Lundi Sport

Media type	Ownership	Channel	Show
Radio	Public	Radio El Kef	Zawaya Al-Ahdath
		Radio Jeunes	Tounes El-Youm
			Maa Wissal Ou Karim
	Private	Diwan FM	Forum de Sfax
			Houna Tounes
	Private	Express FM	Club Express
			Eco Mag
			Sbeh Express
			Tic Talk
	Private	Jawhara FM	Diga Diga
			Politique
			Sbeh El Ward

Media type	Ownership	Channel	Show
Radio	Private	Mosaïque FM	Bennet FM
			Forum
			Midi Show
			Noujoum
	Private	Nejma FM	Nejma Sbeh
			Zoom73
	Private	Shems FM	El Foundou
			Houna Shems
			Malla Nhar
			Matinale
	Private	Zitouna FM	Sabah Ajmal

14 Private media which have been seized by the Tunisian state following the Revolution have been categorised as privately-owned as they intended to be privatised again and have retained their corporate culture after the confiscation of part or all of their capital.

Appendix II – Survey questionnaire

استبيان حول الشباب والإعلام

	التاريخ
	الولاية
<input type="checkbox"/> منطقة عمران <input type="checkbox"/> منطقة ريفية	نوعية منطقة التخطيط
1. 2.	إسم المتطوعين

المعلومات الديموغرافية

<input type="checkbox"/> ذكر		<input type="checkbox"/> أنثى		الجنس
.....				العمر
<input type="checkbox"/> دون ذلك	<input type="checkbox"/> جامعي	<input type="checkbox"/> ثانوي	<input type="checkbox"/> أساسي	المستوى التعليمي
	<input type="checkbox"/> آخر	<input type="checkbox"/> أعزب عزباء	<input type="checkbox"/> متزوج متزوجة	الحالة الاجتماعية
<input type="checkbox"/> لا يوجد	<input type="checkbox"/> ميسور	<input type="checkbox"/> متوسط	<input type="checkbox"/> دون متوسط	مستوى الدخل

1- في يوم عادي قداش تعدي من ساعة على الانترنت؟

- ☐ أقل من ساعة
- ☐ بين ساعة و ساعتين
- ☐ بين ثلاثة و خمسة سوايع
- ☐ أكثر من خمسة سوايع
- ☐ ما عنديش انترنت

2- في يوم عادي شنوما أكثر 3 نشاطات تمارسها :

- ☐ تقرأ جريدة ولى مجلة ("papier")
- ☐ تقرأ الاخبار في مواقع اخبارية على الإنترنت
- ☐ تتفجر التلفزة
- ☐ تسمع الراديو
- ☐ تقرأ كتب
- ☐ تتفجر فيديوات على YouTube
- ☐ تستعمل Facebook
- ☐ تستعمل Instagram
- ☐ تستعمل TikTok
- ☐ تستعمل Apps أو مواقع إجتماعية أخرى (Twitch Discord Snapchat الخ)
- ☐ تتفجر أفلام أو سريات على ordinateur أو التلفون أو التبلات
- ☐ تلعب jeux video

3- تتفجر تلفزة ؟

- ☐ لا، عمري ما نتفجر تلفزة
- ☐ قليل اني نتفجر تلفزة
- ☐ ساعة ساعة
- ☐ نتفجر برشة تلفزة
- ☐ ديمة نتفجر تلفزة

4-تسمع للراديو؟لا، عمري ما نسمع راديو ☐قليل اني نسمع راديو ☐ساعة ساعة ☐نسمع برشة راديو ☐ديمة نسمع راديو ☐**5-حسب رايك حضور الشباب في وسائل الاعلام التقليدية (يعني تلفزة و راديو) كافي؟**كافي ☐مش كافي ☐**6-الشبان إلي يحضروا وإلى يستدعاهم في المنصات الاعلامية التقليدية يمثلوا الشباب التونسي ؟**إي ☐لا ☐**7-الشباب لاقى بلاصتو على منصات الاعلام البديل (مواقع التواصل الاجتماعي) أكثر من منصات الإعلام****التقليدي؟**أي لاقى بلاصتو فالإعلام البديل أكثر مل تقليدي ☐لا مش لقي بلاصتو فالإعلام البديل أكثر مل تقليدي ☐**8-حسب رأيك حضور المرأة في وسائل الاعلام التقليدية (يعني تلفزة و راديو) كافي؟**كافي ☐مش كافي ☐**9-المرأة لاقية بلاصتها على منصات الاعلام البديل (مواقع التواصل الاجتماعي) أكثر من منصة الإعلام التقليدي؟**أي لاقية بلاصتها فالإعلام البديل أكثر مل تقليدي ☐لا مش لاقية بلاصتها فالإعلام البديل أكثر مل تقليدي ☐**10-عندك ثقة في مصدقية القنوات والاذاعات العمومية (وطنية par exemple) ؟**أي عندي ثقة ☐لا ما عنديش ثقة ☐

11- عندك ثقة في مصداقية القنوات والاذاعات الخاصة؟أي عندي ثقة ☐لا ما عنديش ثقة ☐**12- إذا كانت الإجابة نعم شنية أكثر قناة أو إذاعة عندك ثقة فيها؟ تتجمل تختار تلفزة****وحدة وإذاعة وحدة**الحوار التونسي ☐التاسعة ☐نسمة ☐حنبل ☐زيتونة TV ☐الجنوبية ☐تلفزة TV ☐Carthage Plus ☐Mosaique FM ☐Shems FM ☐IFM ☐Jawhara FM ☐إذاعة الزيتونة ☐Express FM ☐قناة أو إذاعة أخرى ☐**13- هل ترى أن وسائل الاعلام التقليدية عندها مستقبل مع الجيل متاعنا ؟**أي ☐لا ☐

14- حسب رأيك الاعلام البديل ينجم ينافس الاعلام التقليدي؟

أي ☐

لا ☐

15- كان جأ عندك pouvoir وفلوس هل تستثمر في إصلاح الاعلام التقليدي أو في تطوير

وسائل إعلام بديلة؟

نصلح الاعلام التقليدي ☐

نطور الاعلام البديل ☐

وقد بلغ مجموع استبيانات المسح 2506 و أجريت على 7 جهات : تونس الكبرى، صفاقس، سوسة، جندوبة،

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