



Yemen Polling Center
المركز اليمني لقياس الرأي العام

INDEPENDENT NEWSPAPERS IN YEMEN: SITUATION AND FUTURE HORIZONS

May. 10, 12

Yemen Polling Center (YPC)

The **Yemen Polling Center (YPC)** is an independent non-governmental organization, which was established in 2004 and received its registration certificate No. 147 from the Ministry of Social Affairs & Labor in December 2005. As the first and only polling center in Yemen, YPC prides itself on providing the highest quality in social science research. Furthermore, YPC is the 2010 recipient of the Best Partner in the Middle East and North Africa award from Gallup International. YPC designs and performs opinion polls, surveys, and employs other methods in studies which serve the research needs of national and international institutions, non-profit organizations, corporations, government agencies, and professional associations.

YPC conducts public attitude surveys, focus groups, in-depth interviews, demographic studies, and market research employing both quantitative and qualitative methods for development projects, international organizations and foundations, publications, business groups, banks, and other stakeholders. YPC was founded by a group of dedicated professional journalists, academics, researchers and volunteers with strong ambitions to bring about progressive change in Yemen informed by social science of the highest international standards. As a member of both the World Association for Public Opinion Research and the American Association for Public Opinion Research, YPC remains committed to excellence in all aspects of social science.

YPC has a dedicated, well-experienced and qualified team. In addition, the Center cooperates with dozens of experts, consultants and university professors within Yemen and abroad when need be. Out of the more than 1,000 field researchers the Center has examined and trained, YPC has selected about 320 enumerators throughout the country for its field research, fifty per cent of whom are female

Our experience, as well as our personnel and technical resources allow us to conduct surveys of any size throughout all of Yemen's governorates, while adhering to the most stringent international standards in data quality and insuring cost effective, timely studies. Furthermore, Yemen is a religious and conservative society in which male-female interactions are quite limited. As such, it is necessary to have female enumerators to conduct interviews with women respondents. Despite these challenges, YPC has successfully implemented dozens of surveys for prominent national and international partners.

Since its inception YPC has conducted or is currently conducting dozens of qualitative and quantitative research projects on a multitude of issues ranging from satellite television and radio consumption patterns and consumer attitudes, to human rights, women's rights, and political reform issues, to corruption, public health, and other governance related studies, among others.

In addition to numerous successfully completed public opinion surveys and research projects, YPC has implemented several economic surveys and qualitative studies since its inception in 2004, covering all governorates in Yemen. YPC has surveyed nearly 100,000 Yemeni citizens by face-to-face interviews.

YPC has wide experience in implementing internationally-funded projects. It has cooperated and thus far conducted dozens of projects with numerous international institutions including the Center for International and Private Enterprises (CIPE), Danicom (Media Consultancy Company), the World Bank, United Nations Development Program (UNDP), Gallup International, Charney Research, International Foundation for Election Systems (IFES), the Middle East Partnership Initiative (MEPI), the National Democratic Institute for International Affairs (NDI), the National Endowment for Democracy (NED), the Pan-Arab Research Center (PARC), the United States Agency for International Development (USAID), the Research Institute (London), the University of Michigan, and the Ministry of Local Administration, among others.

Open Society Institute

The project *Strengthening Independent Media in Yemen* is funded by the **Open Society Institute (OSI)**, which works to build vibrant and tolerant democracies whose governments are accountable to their citizens. To achieve this mission, OSI seeks to shape public policies that assure greater fairness in political, legal, and economic systems and safeguard fundamental rights. On a local level, the OSI implements a range of initiatives to advance justice, education, public health, and independent media. At the same time, the institute builds alliances across borders and continents on issues such as corruption and freedom of information. The institute places a high priority on protecting and improving the lives of people in marginalized communities.

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1 Overview

This research project was completed with assistance from a grant from the Open Society Institute – Middle East / North Africa Initiative Program. The *Strengthening Independent Media in Yemen* project main goal is to identify the greatest challenges and needs of Yemen’s independent media outlets and to provide stakeholders with information on the public’s perceptions of the media as well as their media consumption patterns.

The *Strengthening Independent Media in Yemen* project aims to strengthen democratic structures in the country by providing the local media with information that will help them meet the desires of their consumers, expand into new markets, and identify the most important needs and limitations they face. This information can then be used by the media, donors, civil society/non-governmental organizations, and the government of Yemen to develop capacity-building programs. There are multiple beneficiaries to the project.

The most direct and immediate beneficiaries of the project are the local media. Other beneficiaries include civil society and international organizations active in Yemen and the Middle East, the donor community, and the government of Yemen.

Qualitative and quantitative data used in the report were collected via two scientific tools to achieve the purposes of the study: a qualitative and a quantitative study. The following report gathers together the qualitative and quantitative information obtained to offer an overall picture of the state of the independent media in Yemen, as well as the ways to strengthen it.

2 The methodology

The study attempts primarily to assist the independent media to expand their readership and improve its presence and capacity of influence. Scientific data was collected in order to identify and rank the most prominent problems and challenges faced by independent media, provide a clear picture about expansion opportunities, as well as readers’ preferences and interests. Newspapers’ editors and senior personnel as well as the general public were addressed to collect this information.

YPC used qualitative and quantitative data as follows:

1. Qualitative data: collected via 20 in-depth interviews targeting editors in chief and senior personnel of several independent newspapers and websites.
2. Quantitative data: collected by a nationwide survey included 1505 respondents from 21 governorates.

2.1 Qualitative data collection methodology

The “in-depth interviews” mechanism was selected as a method for this study due to its ability to provide diverse and detailed information. Since one of the goals of the study was to identify independent media biggest challenges, which restrict their success, conducting in-depth interviews

was a very fruitful way of achieving this goal. In the “in-depth interviews” mechanism the respondent is not given limited options specified in advanced , thus allowing the interviewer to manage deep discussion and track details regarding the barriers and challenges faced by independent media in Yemen.

The “in-depth interviews” was proved to be a proper tool when YPC asked respondents to disclose sensitive information (for example, information regarding internal hiring standards, distribution figures, etc.), mostly since the interviews were conducted face to face, with the only presence of the interviewer and the interviewee.

In-depth interviews were conducted in October 2010, and addressed the issues of management of independent media, adhering to professional standards, government interference, and the nature and reasons of limited consumption of independent media.

2.1.1 The sample

Among 57 magazines and newspapers in Yemen, YPC selected ten independent media outlets, considered as representative of independent media at the time of the survey (October 2010). These selected independent media outlets were: Alwasat, Annas, Al-Masdar, Hadeth Al-Madenah, News Yemen, Al-Share, Al-Ahali, Al-Ghad, Marib Press, and Al-Ayam. The latter was finally excluded since when its activity was stopped by governmental authorities. After that, YPC conducted 20 in-depth interviews with its editors and administrators. Al-Ghad and Marib Press eventually decided not to participate in the project.

Several representatives from each newspaper, magazine or website were interviewed in order to ensure a variety of perceptions. For each media outlet, YPC tried to interview the head, chief editor, one reporter and one member of an administrative department such as the distribution or the financial department.

2.1.2 Data collection tool

YPC adopted a three-stage process to develop the in-depth interviews questionnaire. First, the YPC research team, which counts with previous professional journalist, discussed the challenges facing independent media outlets with the purpose of developing an initial idea of the issues to be addressed.

Second, the researchers invited managers, editors and journalists from the independent media to YPC’s office in Sana’a to introduce the project and hold an informal discussion regarding media issues in Yemen. This initial consultation revealed a number of difficulties and obstacles hindering the independent media in Yemen. In the discussion, members of the independent media noted concerns regarding management, financial matters including marketing and investment, distribution challenges, human resource constraints, and government interference as the greatest barriers and challenges faced.

Third, a draft questionnaire was circulated among YPC researchers and evaluated to ensure it would accomplish the objectives of identifying the greatest challenges facing Yemen’s independent media and facilitating the creation of the survey questionnaire

The questionnaire covered the four broad themes highlighted in YPC's discussion with media representatives: management challenges, financial barriers, distribution limitations and governmental interference including legal and extra-legal measures.

2.2 Quantitative Data Collection Methodology (Public Polling Survey)

Face-to-face interviews was the method used by YPC to collect the quantitative data of the study, following the conditions and standards of the World Association for Public Opinion Research (WAPOR) in public opinion surveys and sample designing.

2.2.1 Sample

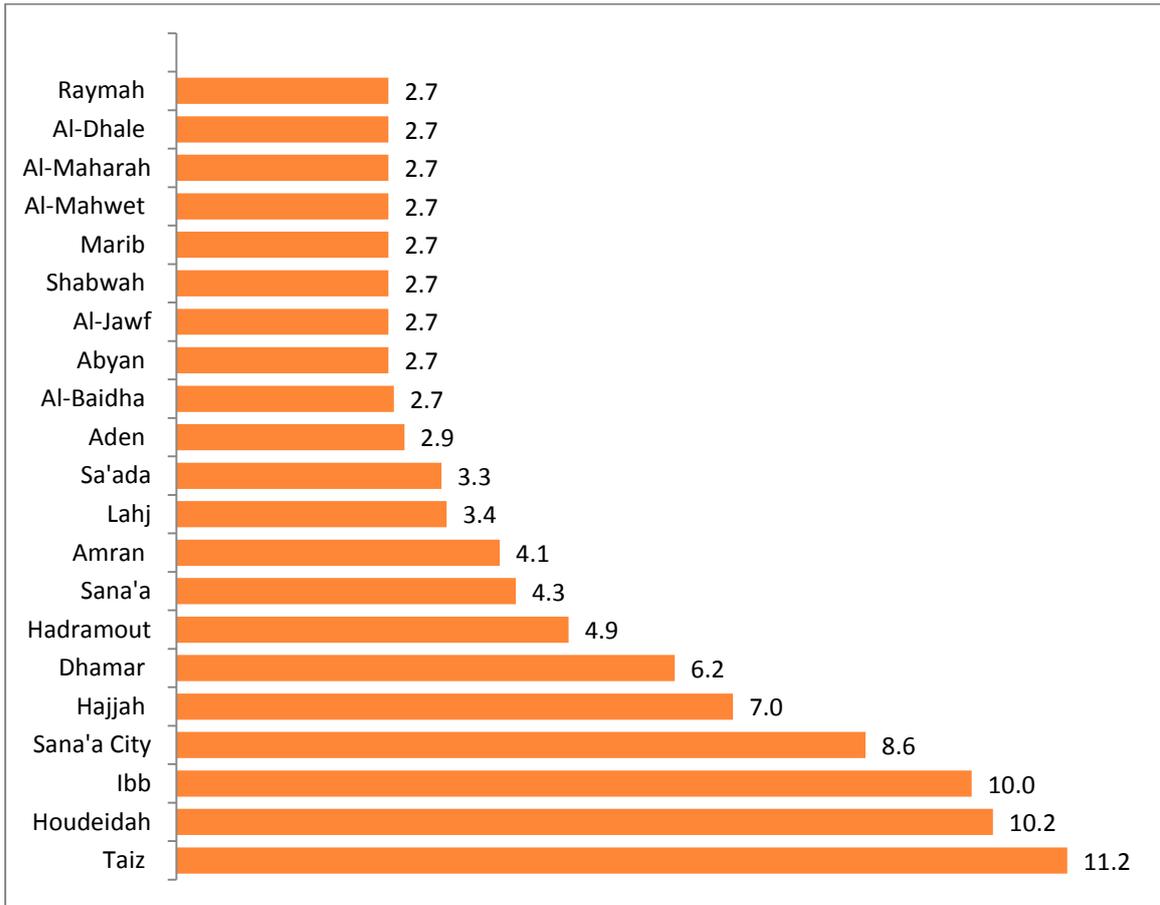
A multi-stage stratified sample was designed for selecting the targeted regions, households and respondents inside the targeted household, and in each stage the selection was random. However, some limitations were taken in the first two stages of designing the sample to serve the goals of the study, as follows:

- When selecting the regions, regions with less than 3000 inhabitants were excluded, in order to explore in real the newspapers expansion opportunities.
- In the respondents selection stage, illiterate respondents were excluded, as the study focus on print media and seeks to study the consumption habits, interest and needs of the potential reader.

2.2.1.1 Sample distribution

The primary sample consisted of 1400 individuals from all Yemeni governorates according to their population weights and the updated registers of governorates' population. 105 interviews were allocated to the governorates whose portion was of less than 40 interviews in order to improve their representation opportunity. The figure below shows the repartition of interviews by governorate comprised in the sample.

Figure1 : Governorate representation



2.2.1.2 Regions Selection

The number of interviews allocated to each governorate was divided by 10, which is the number of the interviews allowed to be conducted in each PSU. The result is the number of the regions that have to be selected (100 interviews / 10 interviews for each PSU = 10 PSU), the regions are drawn from a register including all PSUs (neighborhood/ Mahallah) in the governorate with a population of at least 3000 inhabitants.

This stage is conducted at YPC using the national official registers which provide demographic data for the smallest population unit (neighborhood/ Mahallah)

2.2.1.3 Households and Respondents Selection

These two stages are conducted by the field supervisors and researchers in the governorates after receiving prior training at YPC (3 to 5 days workshop). YPC follows standard mechanisms when selecting households used by major public opinion research institutions, and these mechanisms achieve random selection and provide equal participation opportunity for all without interference from the field researcher.

The supervisor selects the starting point, which changes in each PSU, and selects the household to the left hand based on 1+4 distance; the researcher will conduct the interview in each five household he passes in the walking direction. Household replacement is allowed

only in the case of a respondent refusing to participate in the interview or if no one is found in the household.

Respondent selection is conducted by Kish grid, which is a table designed to select a family member randomly. The researcher writes the family members in a table and select the respondent based on a formula which links the number of the household with the number of the questionnaire. In this stage, the researchers were asked to register only the literate people to select among them.

2.2.2 Data collection tool (survey questionnaire)

The designed questionnaire includes 99 primary questions in addition to 40 additional questions related to demographic information and quality control data. The questionnaire focused on the print media issues including reading preferences. A group of questions were allocated to evaluate the presence of different media – including those which participated in the qualitative research-, the satisfaction level of the respondents regarding media outlets performance, and the respondents' access to information. Overall, the survey questionnaire sought to identify the favorite media types and the ways in which media outlets could expand their readership. The independent media outlets were restricted to the print media.

2.2.3 Sample Demographics

The following are the most significant characteristics of the sample of the survey. **Error! Reference source not found.** shows the demographic characteristics of the sample, and **Error! Reference source not found.** presents the findings of the financial characteristics of the sample. The important findings include:

- Based on gender, males constituted 51% of respondents while women 49%.
- The sample community can be described as a young community, which 42% of the participated respondents from the age group (15-24), 15% of the respondents are from the age group (35-44), and 11% (45 and over).
- Based on the educational level, 8% of the respondents could read and write (but they did not join official education). The majority of the respondents reported that they had finished secondary school, while a quarter stated to have finished secondary school.
- 34% of the people feel that their life is hard with their current income, and 48.8% get by with the current income, while 15% feel comfortable.
- Approximately 43% of the respondents stated that they are employed, while the remaining respondents reported not having a job (the majority of them women, 42.8% of the unemployed women are housewives).

Figure2 : Demographic characteristics (gender, age, educational level)

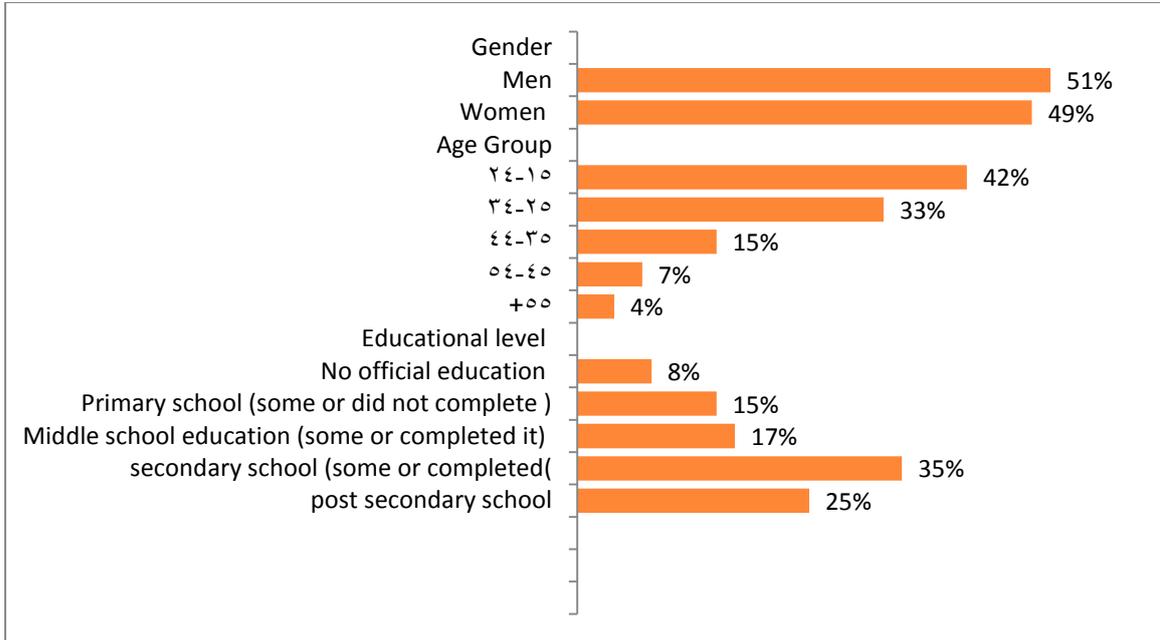
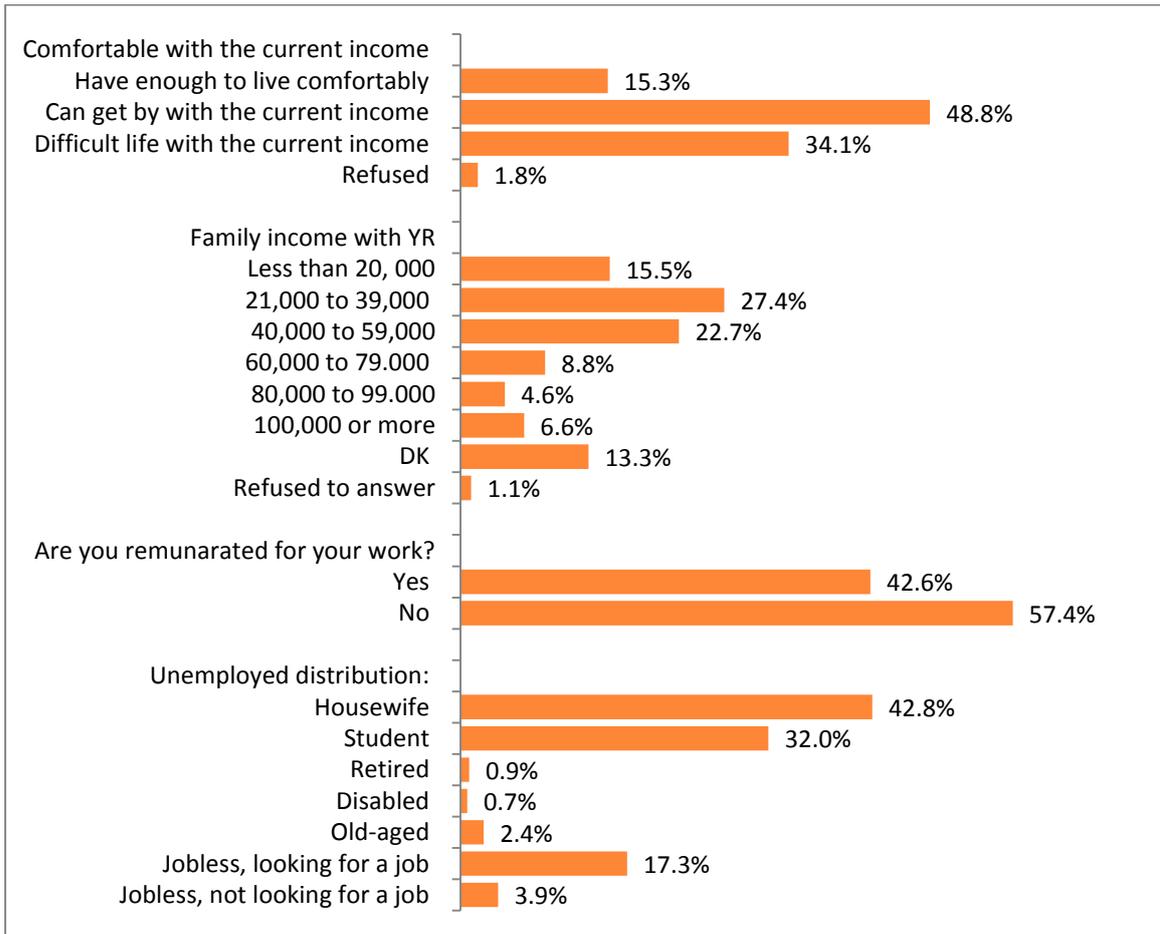


Figure3 : Financial Characteristics



3 Key Findings of Quantitative Survey

3.1 Print Media Situation

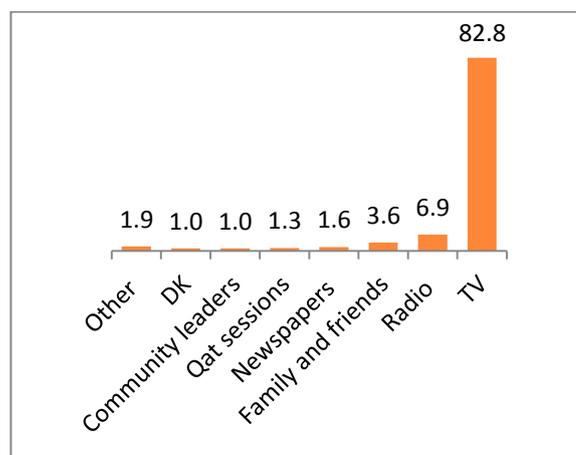
3.1.1 Most important sources of information for the respondents

1.6% of the respondents said that the print newspapers are their most important source of news. Print newspapers constitute the second most important source of news for 18% of the respondents, and the third most important source of news for 10.3%. Print newspapers came second among the first four sources of news with 10.4%, in the overall average of main sources of news.

Table1 :The position of the print newspapers among the information sources

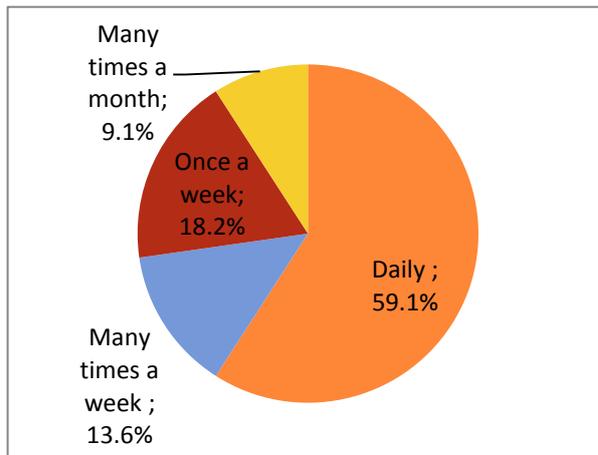
	The first most important source of news	The second most important source of news	The third most important source of news	Overall average
TV	82.8	5.0	1.0	29.6
Family and friends	3.6	23.2	26.0	17.6
Radio	6.9	20.5	3.7	10.4
Print newspapers	1.6	17.8	11.4	10.3
Qat Sessions	1.3	10.7	11.8	7.9
SMS	0.6	3.7	3.1	2.4
Electronic newspapers and websites	0.7	2.9	2.4	2.0
Religious leaders / mosques	0.4	2.1	3.1	1.9
Community leaders	1.0	1.2	2.6	1.6
Tribal leaders	0.2	1.3	1.3	0.9
DK	1.0	11.2	33.2	15.1
Refused		0.3	0.5	0.3
Total	100.0	100.0	100.0	100.0

Figure 4: What is the most important source of news?



According to figure 5, half of those who considered newspapers the most important source of news were regular readers.

Figure 5 : Newspapers readers who selected print newspapers as the most important source of news



When asked about the reason for considering newspapers as the most important source of news, 33.3% (8 respondents) attributed the reason to “ access to reliable information” (see figure 6) .

Table2 : Why do you read these newspapers or magazines more often than others?

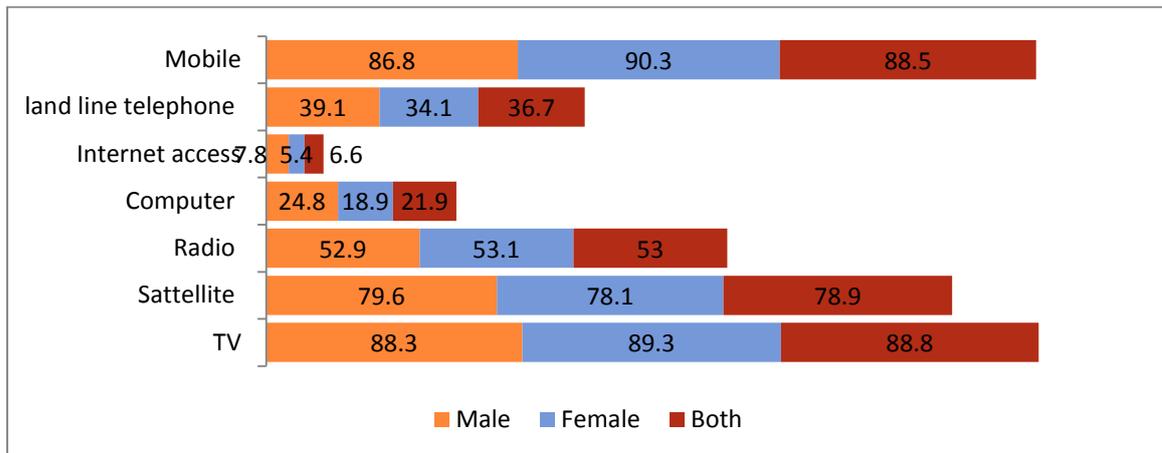
	Number	Rate %
Because it is available, the nearest and the easiest	3	12.5
To get access to reliable information	8	33.3
Because I am stuck to it	1	4.2
Because there is no TV	1	4.2
I like reading	5	20.8
Because it is available at work	4	16.7
DK	2	8.3
Total	24	100.0

3.1.2 Why newspapers are not considered as the main source of news?

More than 73% of the respondents stated that their access to local news is very good. When looking at the position of the print newspaper among the other most important sources of news, TV comes first, followed by friends and acquaintances, Qat sessions and radio.

According to **Error! Reference source not found.**, illustrating the different level of access to several sources of information, TV and cell phones were the most widespread tools to access information among Yemeni population. More than 88% of the respondents stated they have one TV and one cell phone at least. Moreover, TV is considered the most influential source of information and news.

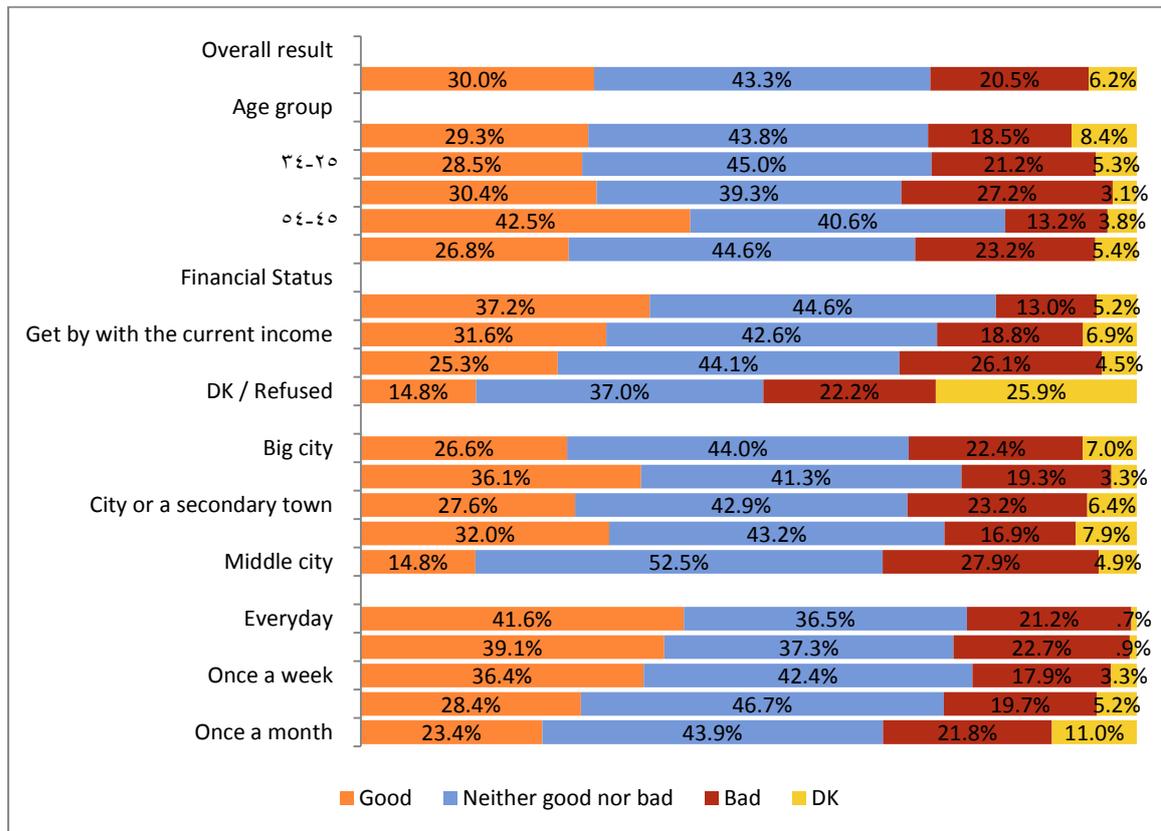
Figure 6 : Do you have one of the following devices at home?



Back to the evaluation of the respondents for their access to the news related to their areas, the most significant differences among population groups were related the age group of the respondents.

Based on age, the old-age respondents 45-54 felt they know “very well” the news of their area, and based on the financial situation the respondents who feel they get good access to the news of their areas were those of excellent or good income. This rate decrease to the quarter with those who said that they have hard life with their current income. Based on the urban - rural , the feeling of getting access to information and news related to their areas was bigger in the small cities, secondary cities and villages rather than in bigger cities.

Figure7 : How would you rate your access to news relevant to your area?



3.1.3 Newspapers' consuming level

5.5% of the respondents reported that they read newspapers daily, while 9.1% of respondents, most of them men, stated that they read newspapers or magazines several days a week, and 7.3% said that they read magazines and newspapers once a week at least. One tenth of respondents read newspapers or magazines two to three times a month. If summing up the rates of the readers and consumers of newspapers on daily, weekly, or many times a month basis, they constitute 31.9% of the respondents participating in the study which equals 481 people out of 1505 targeted people in the sample. Those who do not read newspapers or read them rarely (once a month at most) constitute the majority with 33.3% and 34.7% respectively.

Most of the daily readers are in the age group 45-54, have a university degree and are currently university students or employed. The rate of the daily readers diminish in accordance with the deterioration of the respondents' economic situation. The rate of daily readers plummets among those who stated to have hard lives with their current income. The daily readers are concentrated on the big and small cities.

On the other side, the rate of those who do not read newspapers or read them rarely is higher among women as well as among the youngest and the oldest age groups, as well as among those with little education, and in rural areas.

Figure8 : Generally speaking, how often do you read newspapers or magazines

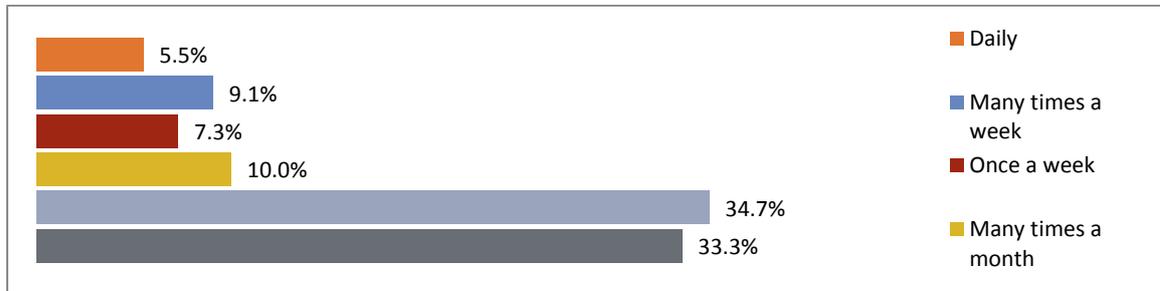
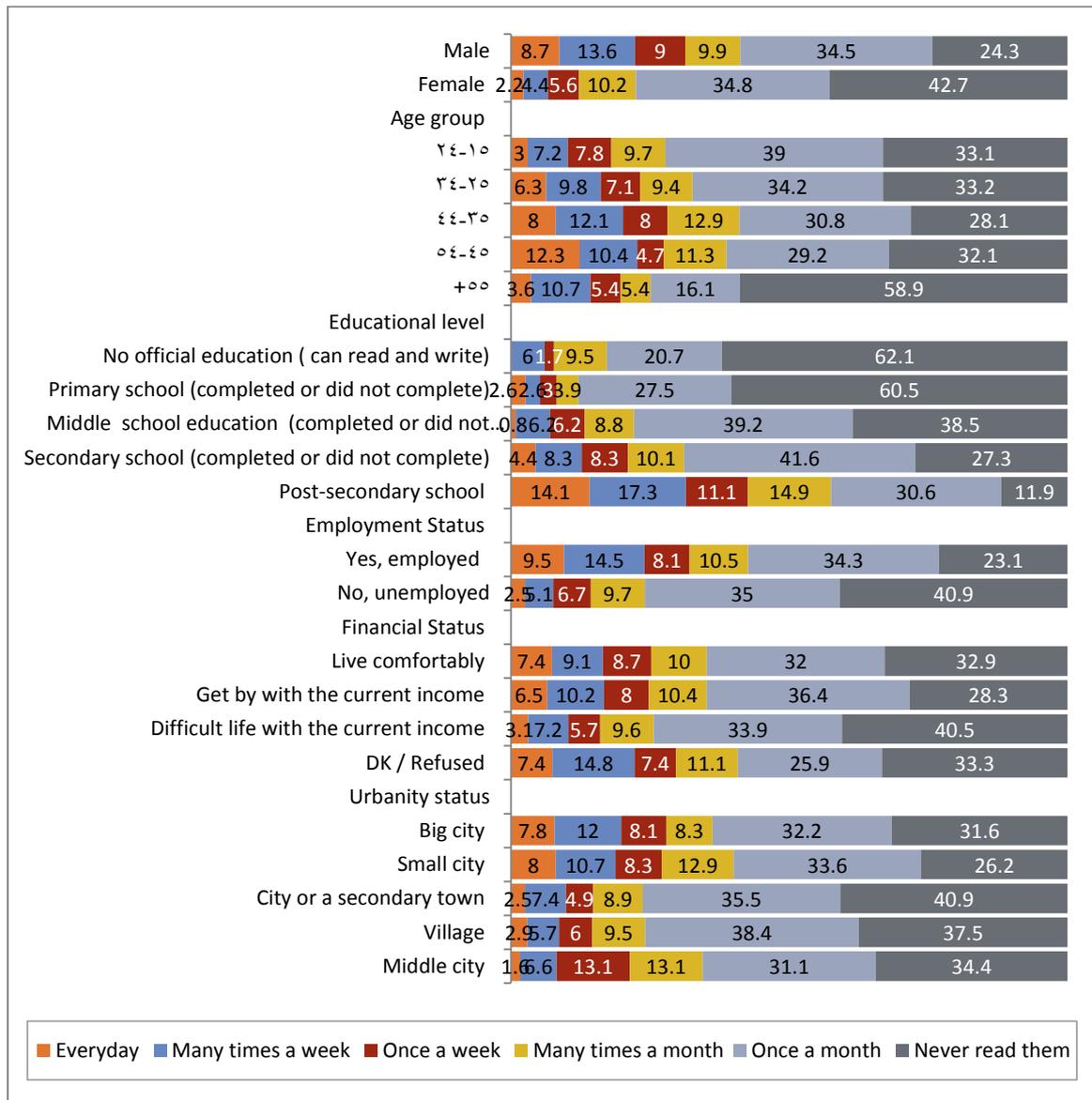


Figure9 : When you read the newspaper, for how long do you usually read it?



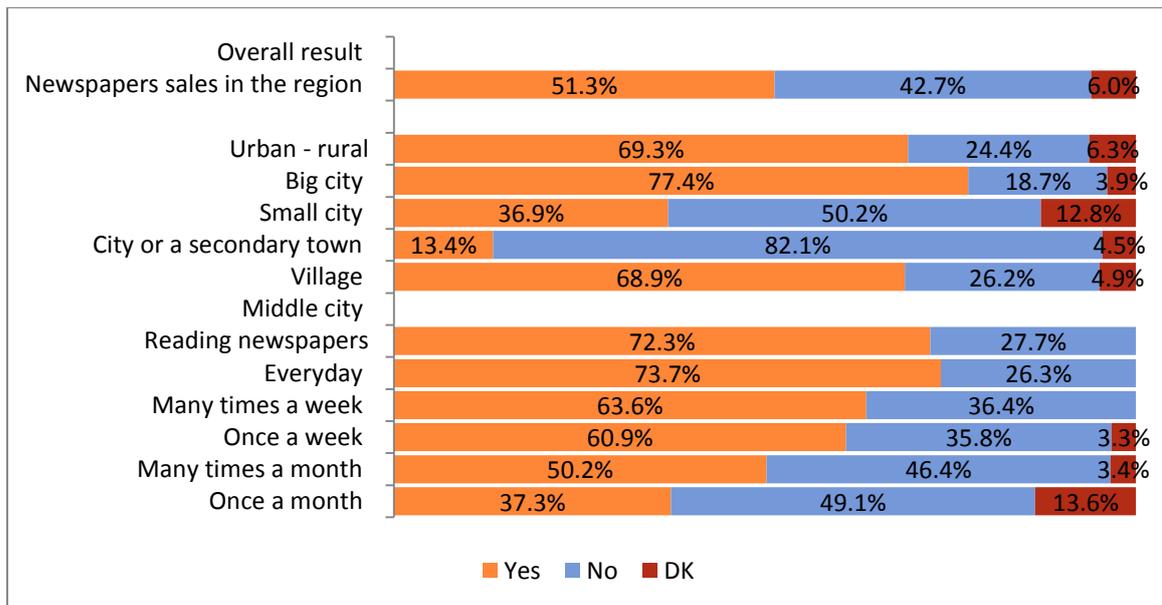
3.1.4 Access to and availability of Newspapers

More than half of the respondents reported that newspapers and magazines are sold in the regions where they live or in the markets nearby their areas. This result is related to the sample design, which as previously explained, targeted mainly the regions with a population of more than 3000 and these regions are usually close to the capital of the governorates or close to the transportation networks.

The result does not change with the gender, age or educational levels variables. However, it obviously change depending on the urban - rural of the area. In bigger cities, 70% of the respondents stated that magazines and newspapers are sold in their areas or close to them, while 80% of the respondents gave the same answer in small cities. In towns or secondary cities, which are often rural, 37% stated that newspapers are sold in their areas or close to them.

Most of the regular readers are located in the regions where newspapers and magazines have a higher availability. Irregular readers or not readers were mostly found among those stating that newspapers were not sold in their areas.

Figure10 : Are newspapers or magazines available for purchase in your area or in the market near to your area?



However, the areas where newspapers and magazines are not sold are often located close to the areas in which they can be found, in a 10-20 minutes distance.

Table3 :: How long one person from your area needs to reach the nearest place where the newspapers and magazines are available for purchase?

	Number	Rate%
From 10 to 20 minutes	193	30.1
From 21 to 40 minutes	161	25.1
From 41 to 60 minutes	49	7.6
From 61 to 120 minutes	48	7.5

More than 120 minutes	33	5.1
DK	158	24.6
Total	642	100.0

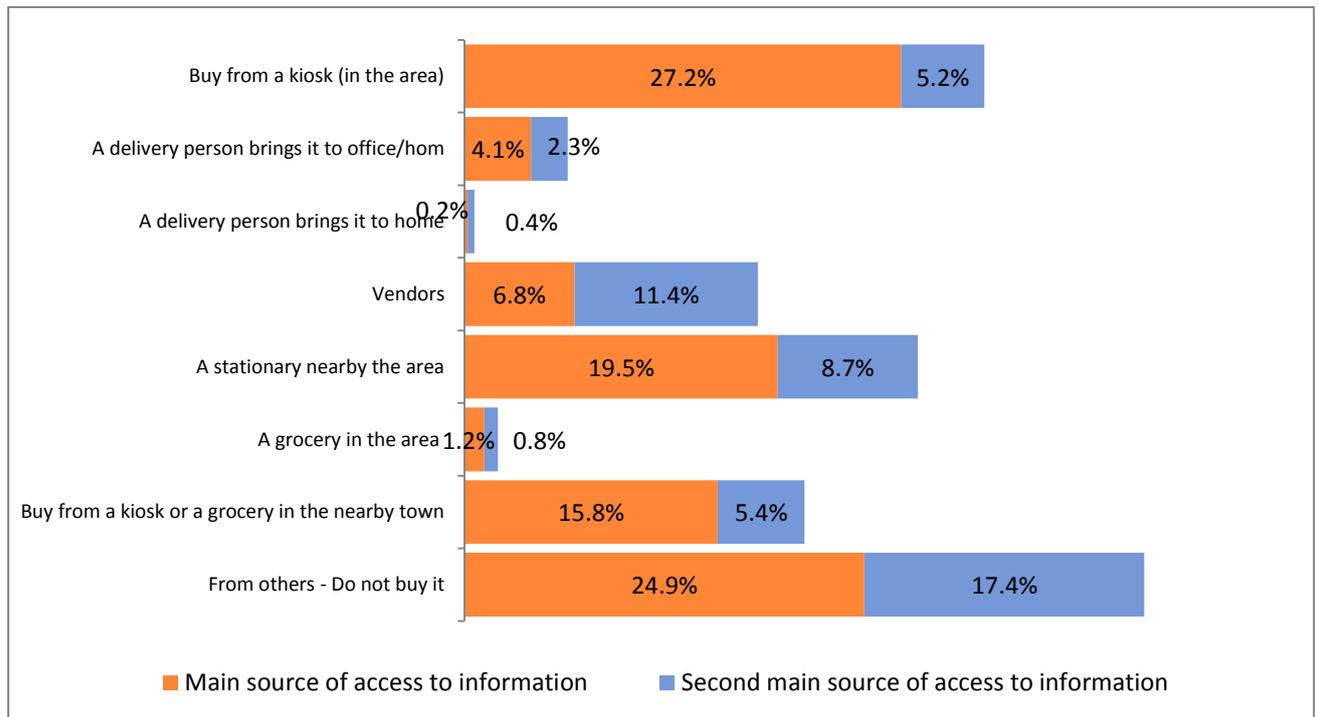
3.2 Readers Interests and Reading Habits

In this section, we consider newspapers readers those respondents who stated reading newspapers daily, weekly, or many times a month. Those who read newspapers once a month or less, or do not read them at all were considered the group that is not regularly exposed to newspapers.

3.2.1 Access to Newspapers: Readers' habits

Regular readers often get access to newspapers through newspapers kiosks available in their areas according to 27.2%, and most of these are men. The second most important source of access to newspapers and magazines is to obtain them from others (24.9% of the regular readers do not buy newspapers), the majority of them are women. About one fifth of respondents, 19.5%, obtain newspapers and magazines from the stationaries close to their areas and 15.8% from kiosks or stationaries from the city of neighboring area. About 7% of the respondents obtain newspapers and magazines from the vendors, and 4% obtain them from their workplaces.

Figure11 : Where do you get your newspaper or magazine most of the time?



The habit of purchasing newspapers and magazines is influenced by many factors, like the gender and income level. Among regular newspapers and magazines readers, men are considered the main purchasers, while women constitute the majority of those who get newspapers from others (men often buy newspapers and bring them to the house). 55% of

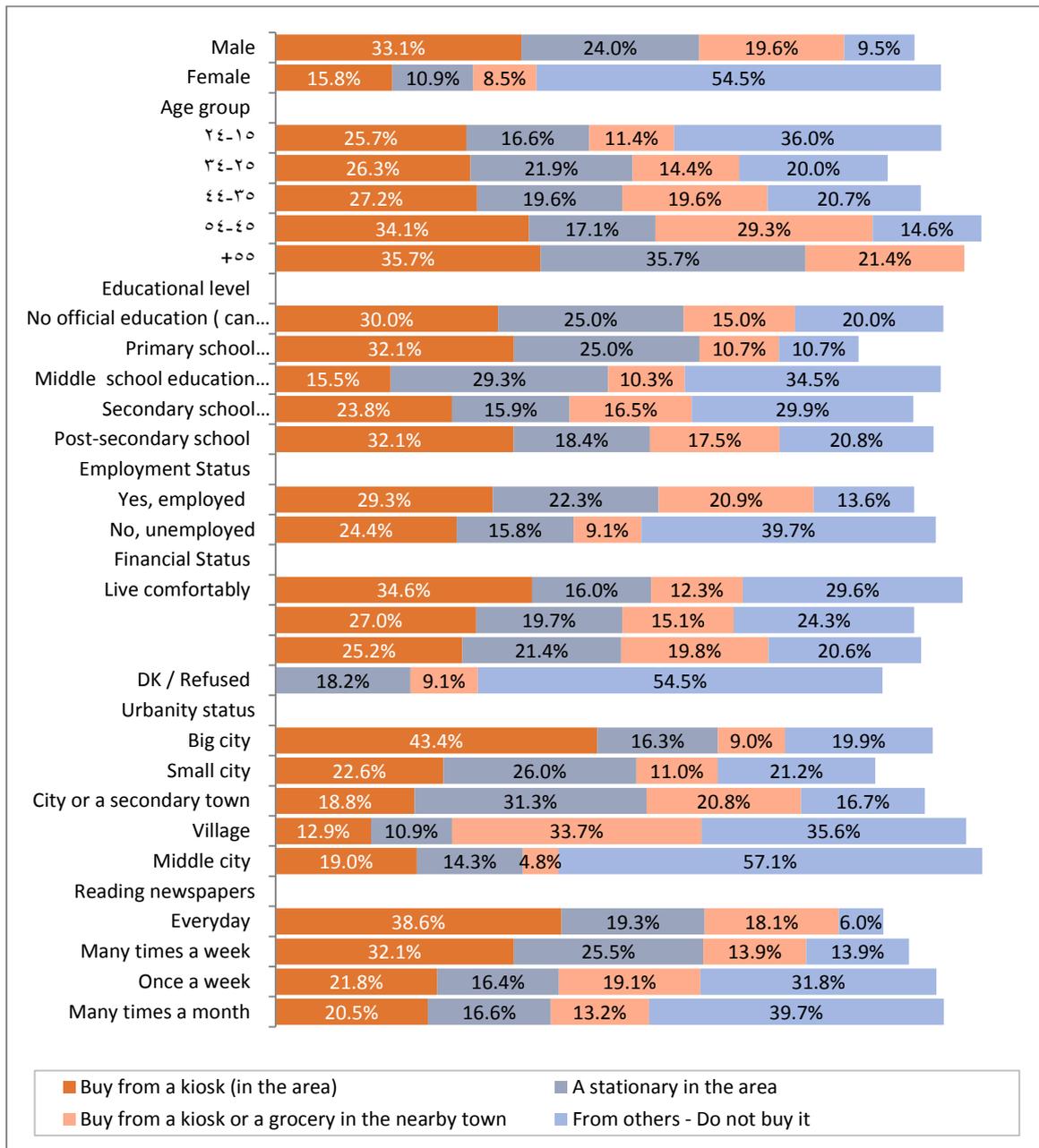
men versus 16% of women buy magazines and newspapers from kiosks in the area, according to the **Error! Reference source not found.**², which focuses on the most prominent sources where to access newspapers and magazines for the regular readers.

The economic situation influences somewhat the process of purchasing magazines and newspapers. The difference between those who reported that they have a good economic status and those who said they have a hard economic life is 10% in terms of purchasing newspapers and magazines. About 35% of the regular readers who said they have a comfortable life with their current income buy newspapers and magazines versus 25.2% of regular readers who stated they have a hard life with their current income.

Urban – rural constitutes the most influential factor. The majority of regular readers who buy newspapers are concentrated in the big cities while the regular readers in the rural areas, middle cities^{*}, and towns represent the majority of those who obtain newspapers and magazines from others.

^{*} It is worth mentioning that is meant by middle cities the middle cities in terms of volume following the big cities. This is applicable to all figures and results based on the variable of urbanity status.

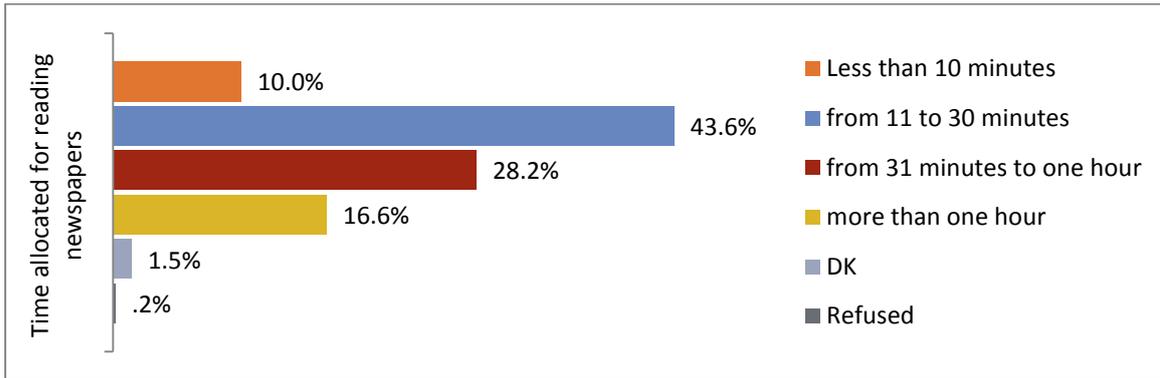
Figure12 : From where do you get your newspaper or magazine most of the time?



3.2.2 Reading Period

Most of the regular readers (43.6%) spend from 11 to 30 minutes in reading newspapers and magazines every time they read. More than 28% spend from 30 minutes to one hour, 16% spend more than one hour in reading newspapers or magazines, while 10% spend 10 minutes or less. The rates did not change significantly based on gender, educational level, or urban - rural or even the level of consuming newspapers, with insignificant differences among those who read newspapers daily, semi-daily or weekly.

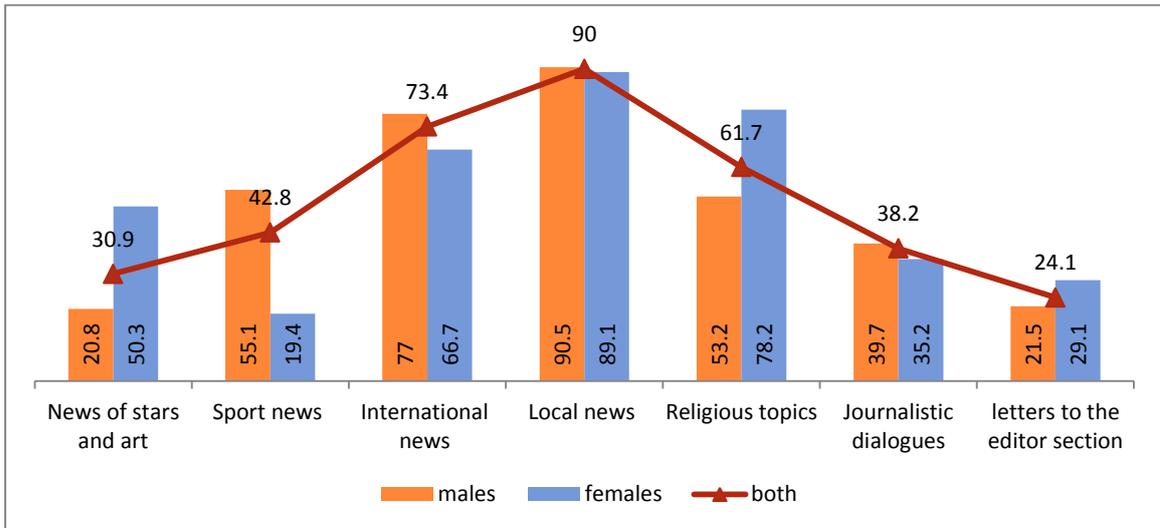
Figure13 : When you read newspapers, for how long do you usually read them?



3.2.3 Readers' Preferred Issues

Local news constituted the most consumed topic by regular readers, followed by international news. Approximately, both men and women mentioned similar preferences except on three issues: sports, arts and music, and religious issues. While men showed a bigger interest in sports, women were highly interested in issues related to arts and music, as well as religious issues.

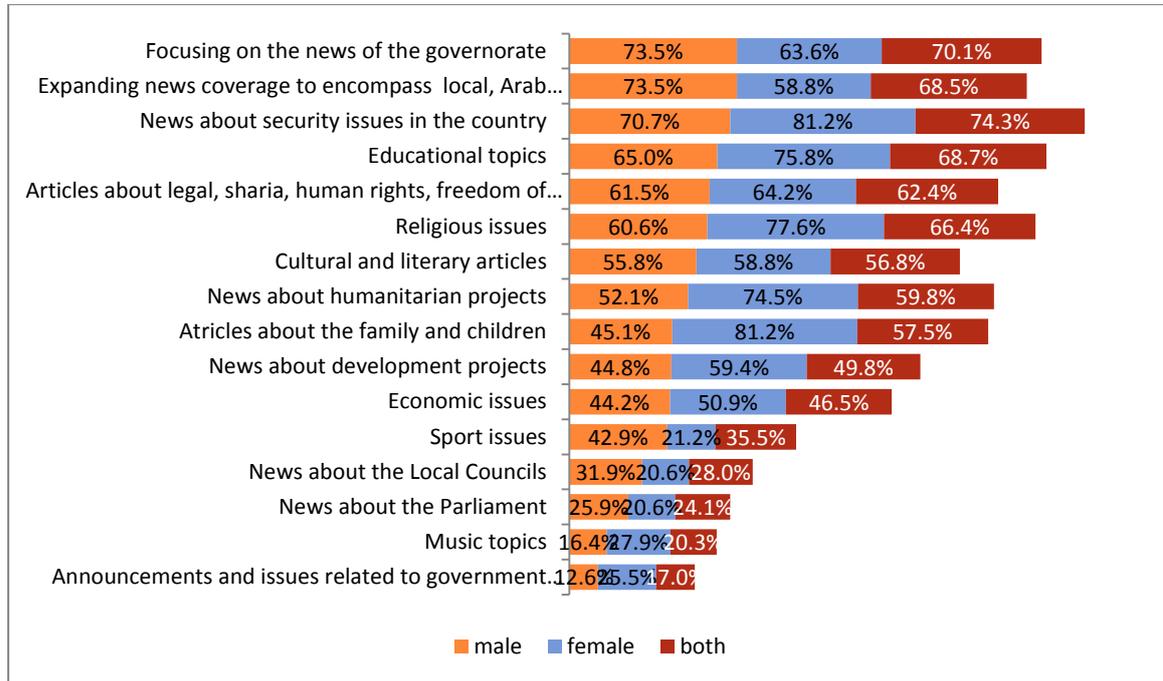
Figure14 : What type of topics or issues do you like the most to read about?



3.2.3.1 Topics that readers would like to have more room in publications

News related security in Yemen were the ones readers would like publications to allocate a bigger space in their publications, followed by local news of their governorates; national, regional and international news; educational topics and religious issues.

Figure15 :In order to introduce topics and issues that are of interest to you, please state whether you would like to read more, about the same, or less of the following subjects, items or programs?



3.2.1 The Presence of Newspapers Among Regular Readers

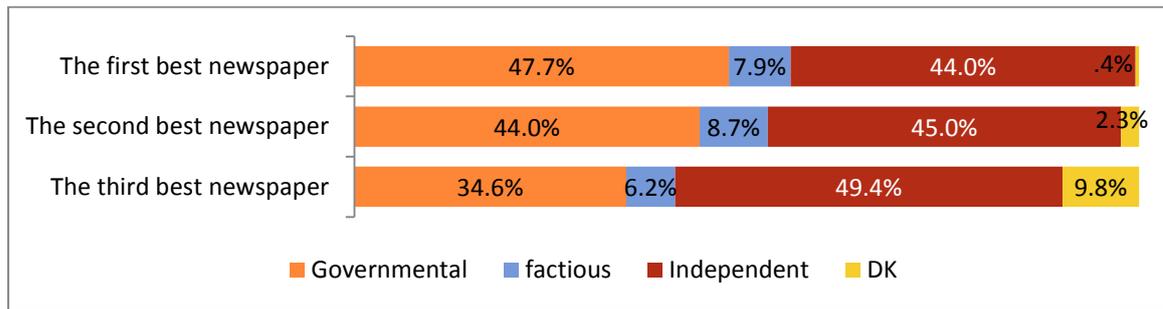
Regular readers were asked to identify their three preferred newspapers. Figure 16 presents the results of the respondents’ answers after classifying newspapers and magazines based on the ownership. Governmental and independent newspapers were the most selected ones, and were close to each other when selecting the best newspaper, the second and the third best newspapers were often independent.

However, when looking at the number of the newspapers mentioned in each group, the governmental newspapers were the most present among the readers. Seven governmental newspapers were mentioned by 47.7% of the readers when they were asked about their selection for the best newspaper, versus 23 independent newspapers mentioned by 44% of readers.

Moreover, when selecting the second best newspaper or magazine for them, the votes of 44% of readers were distributed among 9 governmental newspapers versus 23 independent newspapers, selected by 45% of the readers. When selecting the third best newspaper or magazine, 34.6% of the readers selected 9 newspapers, while 79.4% of the readers selected 25 independent newspapers.

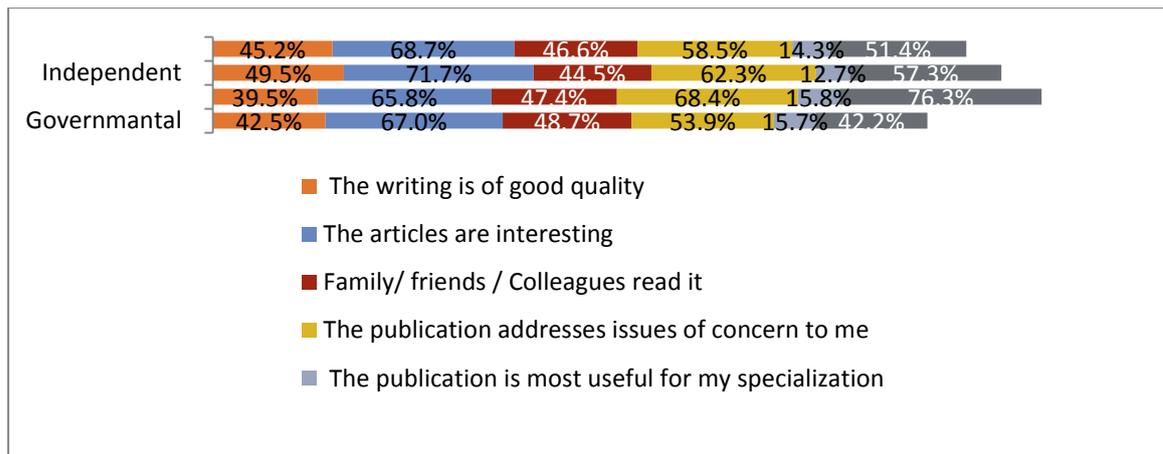
No differences were found between the preferences of women and men. That can be attributed to the big rate of women subordination to the choices of men, since as seen before, usually women read what men buy or bring to the house. Women constitute the majority of those who obtain newspapers and magazines from others. Men have higher rates of employment than women –usually unemployed-, and the workplace is one important source for obtaining newspapers.

Figure16 : Classifying newspapers selected by respondents into three types based on ownership



A list of potential causes for preferences was given to the regular newspapers readers, to select the reason of their preferences. 45.2% stated that they prefer those newspapers because their writings are of high quality, while 58.5% of respondents stated that those newspapers addresses their issues. 68.7% said that they provide interesting topics, 51.4% reported they provide reliable and neutral information, and 46.6% stated that it is the newspaper or magazine that a friend or a family member reads.

Figure17 : Why do you read these newspapers or magazines more often than others?



3.2.2 Regular newspapers readers interest to access specific media outlets

More than one quarter of the readers (27.2%) said they like to read some specific newspapers but they cannot access them. There were significant between male and female readers. Whereas 34% of women stated they would like to read some newspapers they do not have access to, only 23.7% of men stated not having access to the publications they want.

The respondents’ answers were not far from the general average based on the age groups, except for the old aged people (55 and above). The old aged people reported that they do not want to read any other newspapers apart from the ones they mentioned in their preferences.

The educational level influenced the readers answers. The higher the level of education is, the more newspapers readers would like to have access to some newspapers they cannot now. The situation is the same when it comes to the income level: the more the income level

increases, the higher the willingness to access to some newspapers currently not available is. The rate of those who would like to read newspapers they have not access to decreases among the low-income readers.

Respondent from rural areas represent the majority of those who reported they would like to read newspapers but they have no access to them. The reason for 65% of the respondents is the lack of these newspapers and magazines in their regions, the high price (more than 24% of respondents) and because the publications stopped publishing or are currently banned (10%).

Figure18 : Are there other newspapers or magazines you would like to read but are unable to?

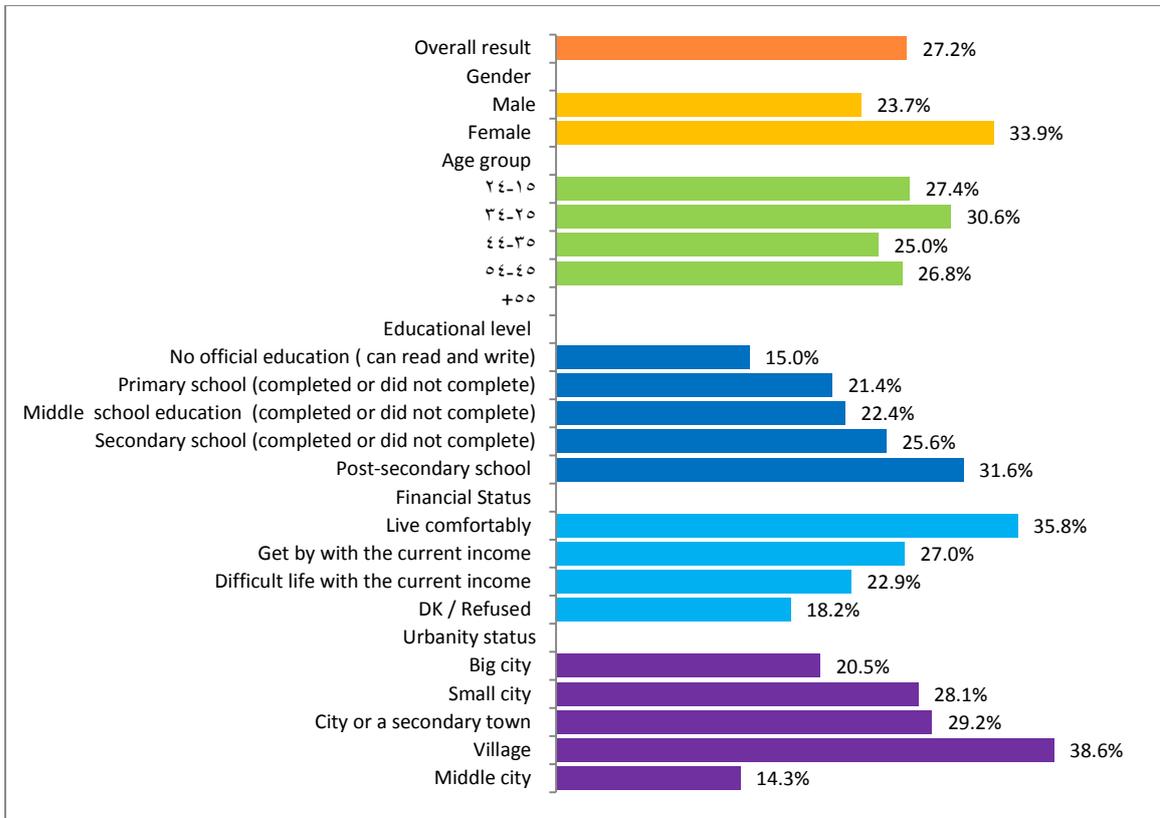
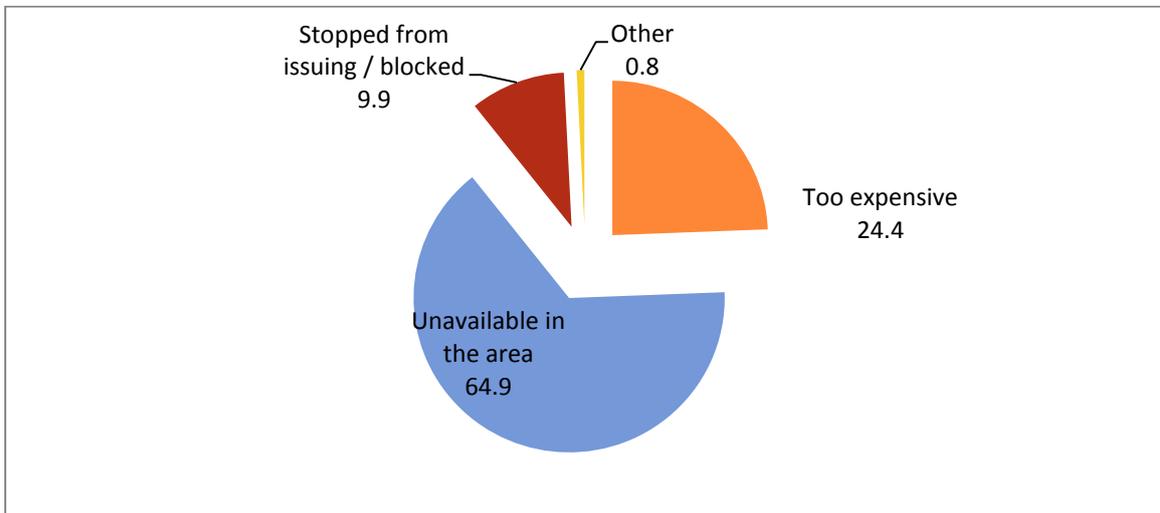


Figure19 : Why are you unable to read these newspapers or magazines?



The table below includes the newspapers an important percentage of readers (27.5%) would like to read but they do not have access to. Al-Ayam newspaper received the highest rate, followed by several Arab print magazines and newspapers. Women constitute the majority of readers who would like to read these publications, with most of these publications being magazines providing topics consumed mostly by women.

Table4 : What are the newspapers or / and magazines you like to read but you are unable?

Newspaper/ magazine	Men	Women	Both
Al-Ayam	14.2	16.1	30.3
Zahrat al-Khaleej	2.7	18.3	20.9
Saydati	0.9	18.3	19.2
Al-Arabi Magazine	3.5	10.8	14.3
Al-Arabi al-Sagheer	2.7	3.2	5.9
Al-Qods al-Arabi	4.4	0.0	4.4
Al-Hayat London	4.4	0.0	4.4
Al-Rai Alam	1.8	2.2	3.9
14 October	1.8	2.2	3.9
Al-Nas	2.7	1.1	3.7
Al-Sharq al-Awsat	3.5	0.0	3.5
Al-Hawadith	3.5	0.0	3.5
Al-Mustaqillah	1.8	1.1	2.8
Al-Nahdhah	2.7	0.0	2.7
Haya	0.0	2.2	2.2
Sami	0.0	2.2	2.2
AL-Wihdah	0.0	2.2	2.2
Al-Shaqa'eq	0.0	2.2	2.2
Al-Syasyah	0.0	2.2	2.2
Laha	0.9	1.1	2.0
AL-Nogoum	0.9	1.1	2.0
Al-Qadha'eyah	0.9	1.1	2.0
Al-Saqr from Qatar	0.9	1.1	2.0
Al-Diar	0.9	1.1	2.0
Al-Ahram	0.9	1.1	2.0
26 September	0.9	1.1	2.0

3.3 Readership Expansion Opportunity

3.3.1 Challenges Facing Reading Newspapers

Among the targeted public, the biggest challenges preventing reading newspapers is the lack of newspapers and magazines in their areas (according to 31.8% of the total respondents who do not read newspapers, which constitute 68% of the overall targeted sample). The second barrier is the feeling that other sources like TV suffice (20.4%). The third barrier is the lack of time to read newspapers and magazines, or no interest in news (14.2%). The availability of governmental newspapers in many areas is an effective factor for the readers preferring this type of newspapers.

Figure 20 : Reasons for not reading newspapers (rate of those who do not read newspapers - sample= 1023)

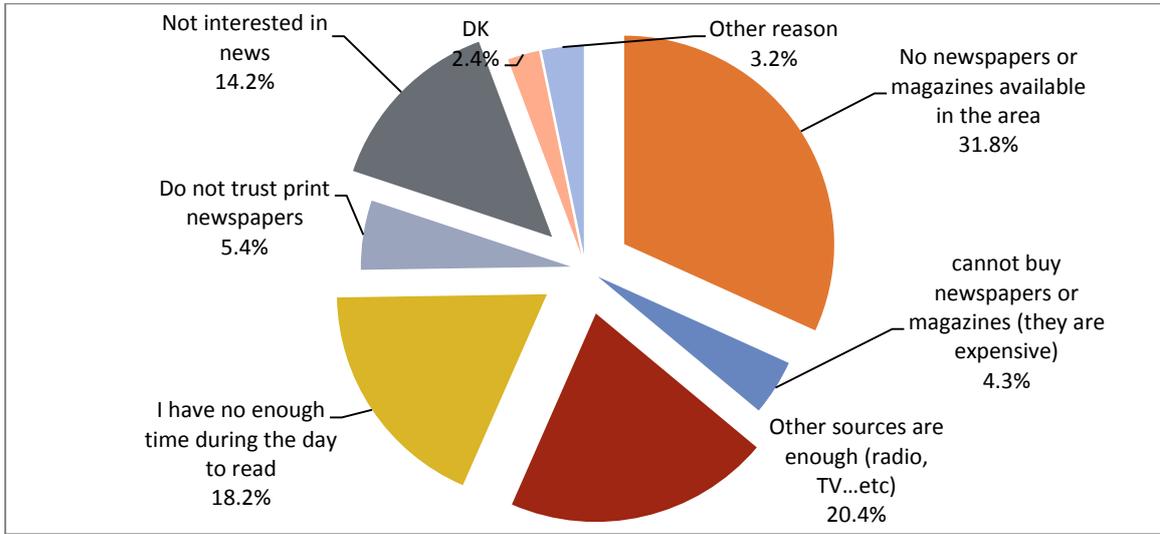
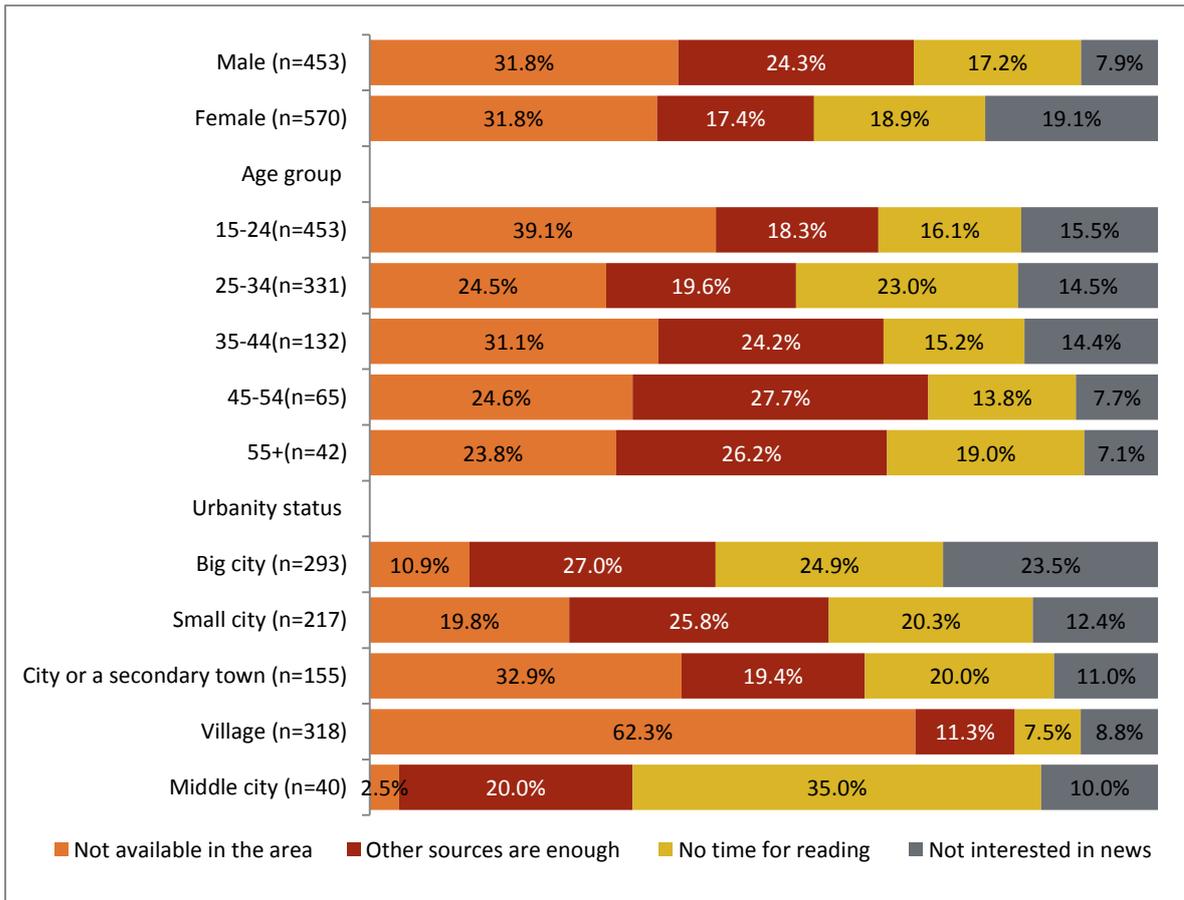


Figure 21 : Reason for not reading newspapers by Gender, age, and urban - rural



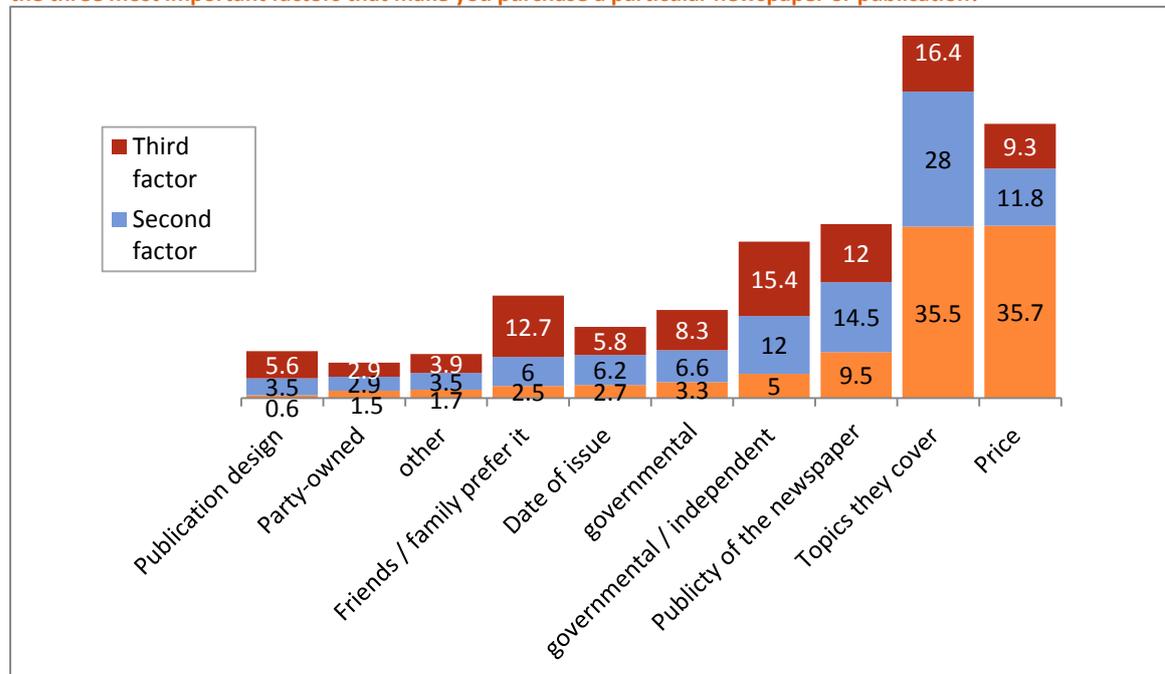
3.3.2 Most Important Factors for Buying Publications

3.3.2.1 The price

Over 35% of the readers mentioned the price of the publication as the first factor which determines whether they buy a publication or not.

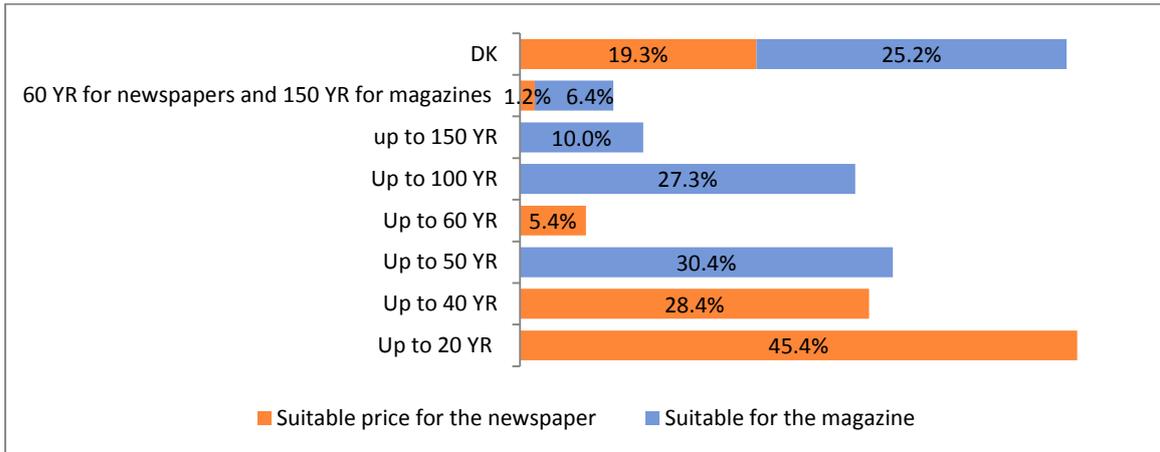
When readers specified the second factor for buying or not a publication, 28% selected the issues included in the publication, and 14.5% selected the publicity of the publication, while 12% said that their second factor was the independent nature of the publication. For the third factor, 15.4% reported the independent nature of the publication.

Figure22 : If several newspapers or publications are available to you and you want to purchase one, what are the three most important factors that make you purchase a particular newspaper or publication?



The respondents of the survey were asked about the suitable price of the newspapers and magazines. 45% of the respondents specified in February and March 2011 (up to 20 YR) as a convenient price for newspapers, 28% selected (up to 40 YR), and 19.3% stated that they did not know the suitable price for a newspaper. For magazines, about 30.5% that the suitable price for magazine is (beneath 50 YR), while 27.3% reported (up to 100 YR), and 25% of the respondents did not know the suitable price for a magazine.

Figure23 : What would be the suitable price for the newspaper or magazine?



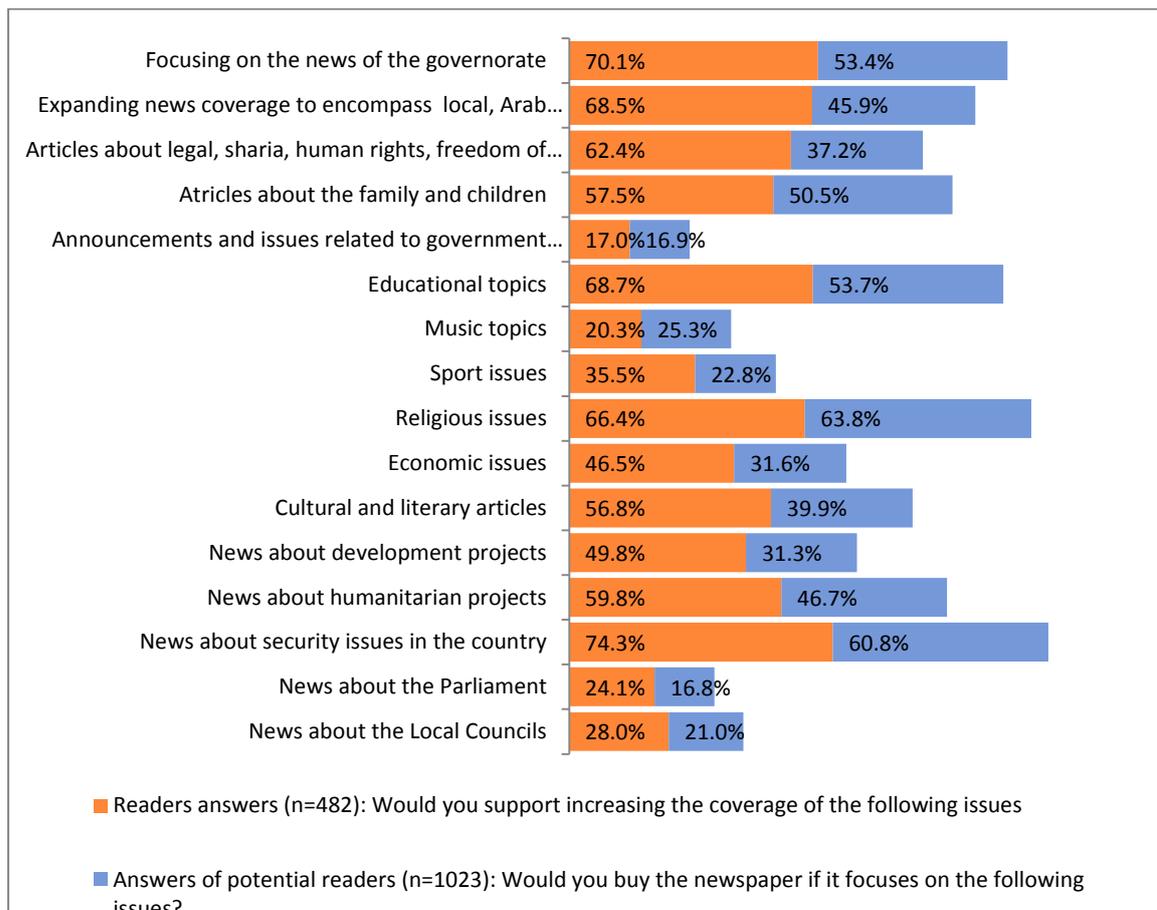
The respondents' answers were not influenced based on gender, employment status, or age group. A little change of $\pm 6\%$ was registered among respondents based on income level, urban - rural, and those who read newspapers and magazines or not. The regular readers, especially those who read newspapers daily, were supporting lower prices for magazines.

3.3.2.2 Topics

Regarding the topics, the question was asked twice; the first time for the regular readers who constitute 32% of respondents (n=482), and in the second time for the respondents who reported they do not read newspapers or magazines or they read them rarely (68% of the sample (n=1023)). The readers were asked either or not they would like the publications to increase the published topics and to pay attention to those topics listed in **Error! Reference source not found.** Then the respondents who do not read newspapers and magazines were asked either or not the list includes topics they are interested in.

The respondents' answers by gender were very close, however men seemed more interested in sports, economic, development, projects, parliament and local news. Women are more interested in articles about family and children, arts and music, and famous figures.

Figure24 : What type of topics or issues do you most like to read about?



3.3.2.3 Significance of providing Publications

More than half of the respondents who do not read newspapers or read them rarely stated that they would buy newspapers/ magazines if were sold in a nearby areas or in their regions. The respondents who reported they do not read newspapers or magazines or they read them rarely represent 68% of the total sample. Figure 25 shows the results of the question based on the number of the variables that influenced the results of the respondents' answers, which older age groups stating they would not buy newspapers or magazines even if they were sold in nearby areas. By educational level, the number of those who would like to buy newspapers if they are available increases whenever the educational level increases. The rate of those who are ready to buy newspapers and magazines in case they are available reached 60% of those who obtained an university degree or higher, and 54% who are at secondary school.

All respondents were asked to identify all the places in their areas they think are suitable to provide newspapers and magazines. The majority (63.5%) selected a stationary in the area, 47.4% stated a special kiosk in the area while 29% said that the venders are a good mean to provide newspapers and magazines in their regions. More than a quarter of the respondents (28.4%) mentioned the market of their area (any place in the market) among their selections asselling points of newspapers and magazines, and 24% selected a grocery in their region.

Figure25 : If the newspapers and magazines are available near your area or in your area, would this makes you purchase a newspaper or magazine or not?

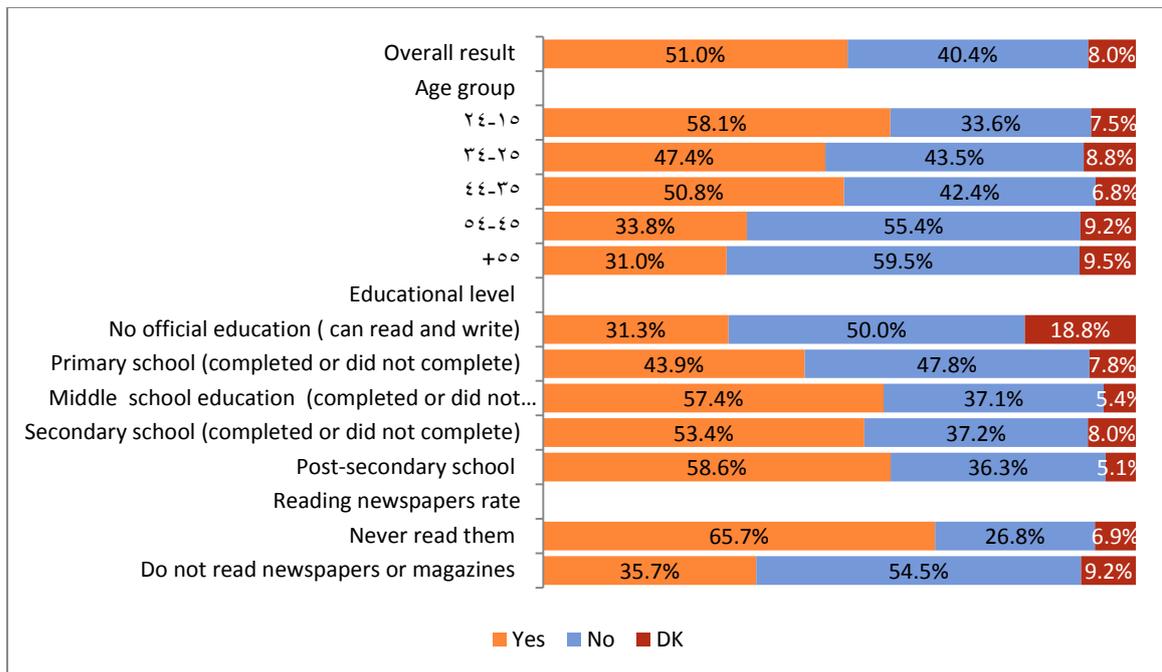
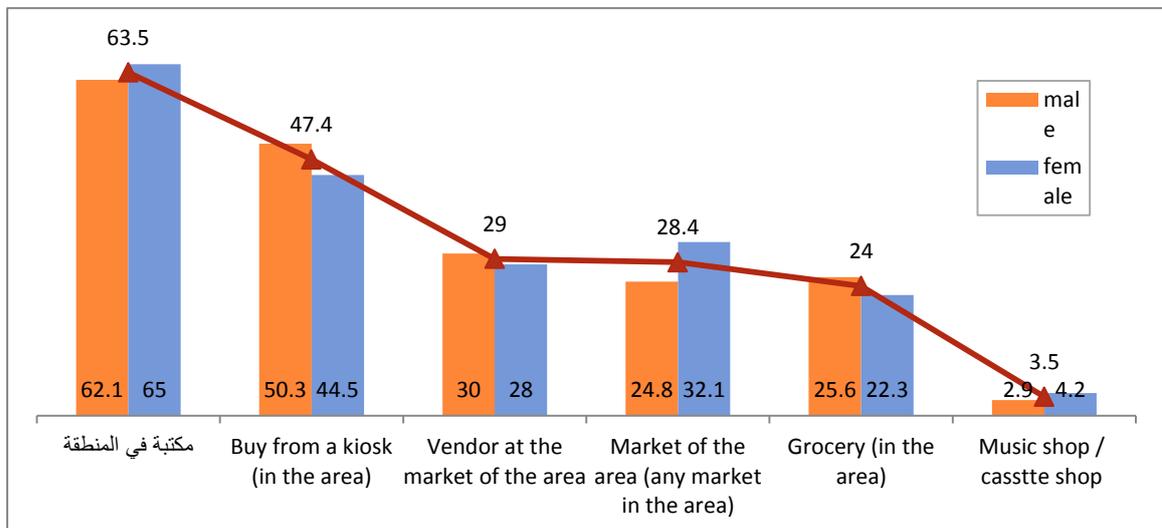


Figure26 : Where do you get your newspaper or magazine most of the time?

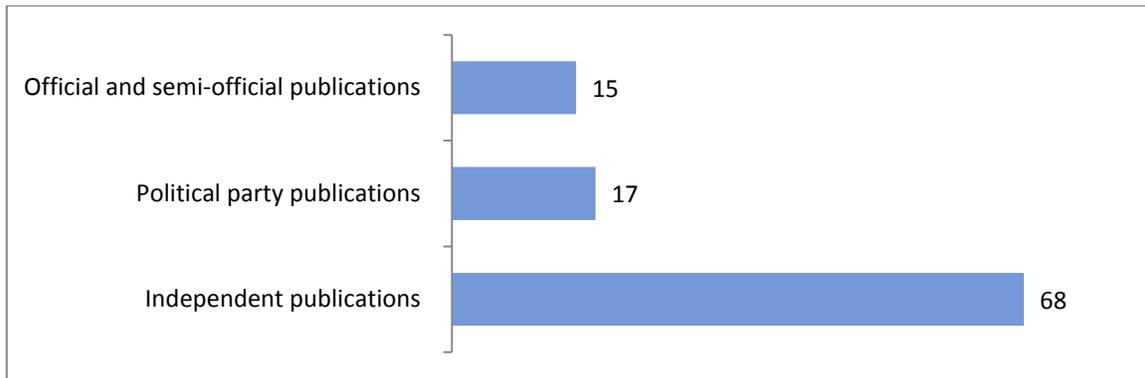


4 General Findings of Qualitative Research

4.1 Yemen’s Independent Media: Mapping and Characteristics

According to the Ministry of Information, there are 257 registered newspapers and magazines in Yemen. 68% (175 publications) of them are independent publications, whereas 15 percent (38) are official or semi-official and 17 % (44) belong to specific political parties.

Figure27 : Registered publications



Most of the independent publications are published on weekly basis (34%), followed by the independent publications published on monthly basis (7%), bi-monthly publications (7%) and quarterly publications (5%).

Only 2 % of independent publications are published daily, corresponding to one independent daily publication in Aden and one in Sana’a. This percentage is quite low in comparison to the 11% of official or semi-official publications issued on daily basis.

A remarkable percentage of publications (35%) do not publish on regular basis or do not have a specific periodicity to be issued.

Figure28 : Periodicity of governmental/ independent / party-owned newspapers

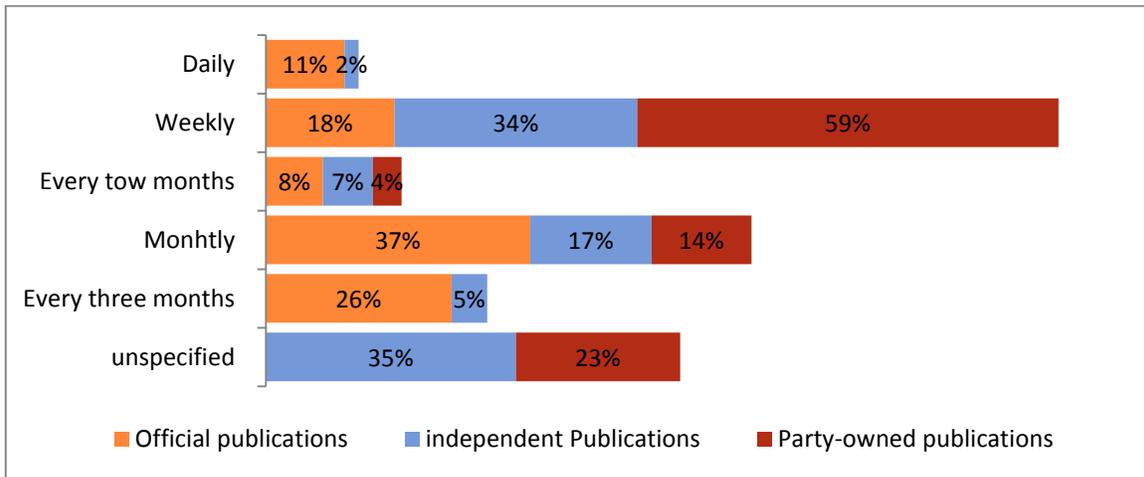
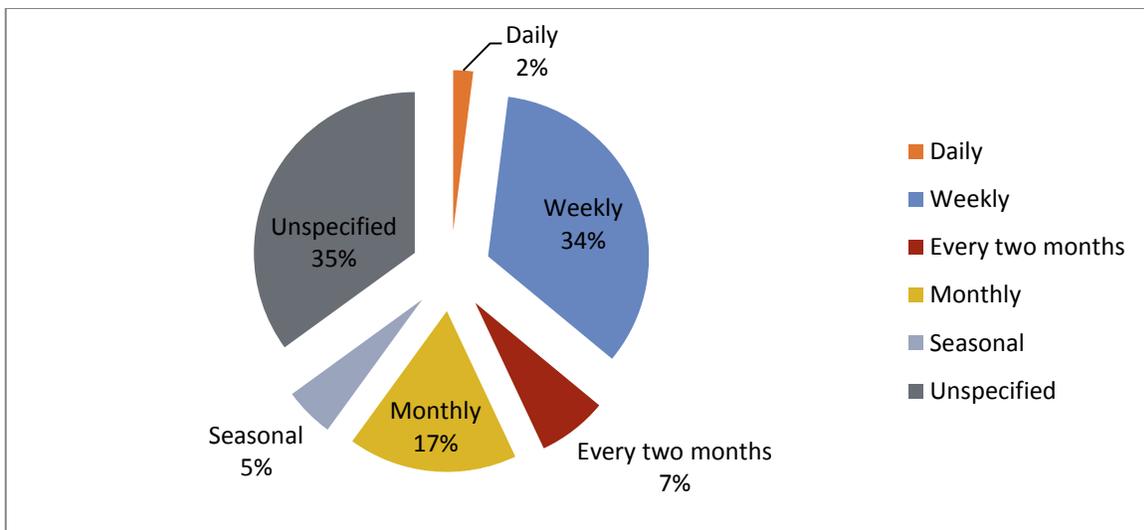
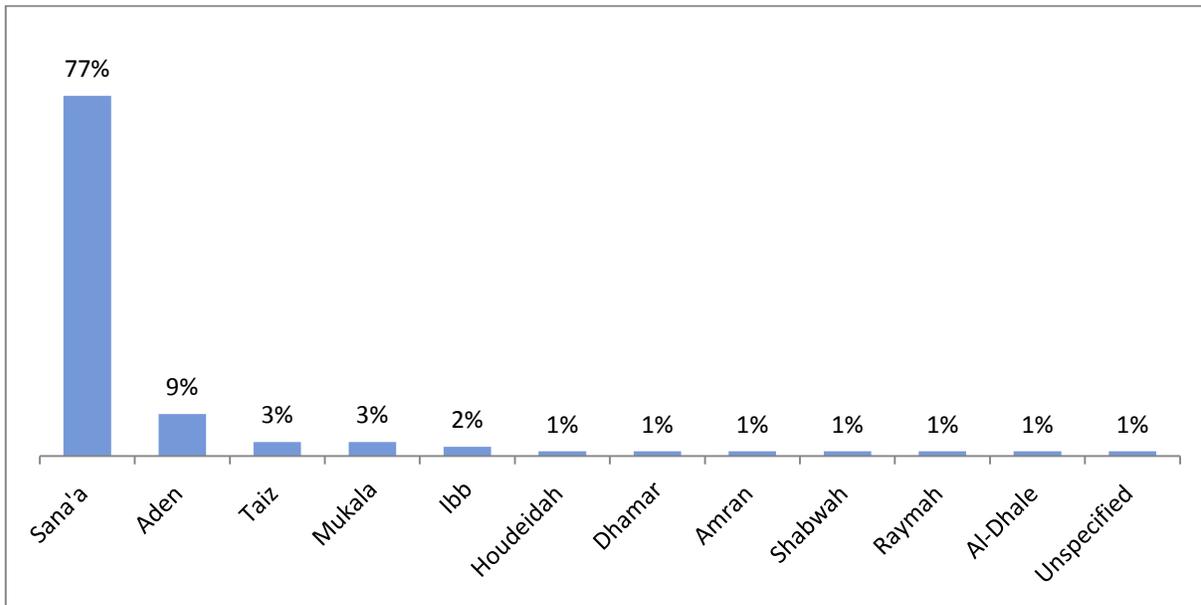


Figure29 : Publications' periodicity rate



Regarding the geographical location of the independent publications in Yemen, there is a significant concentration of publications in Sana’a, with an outstanding 77 % of publications based in the capital. Aden gathers 8 percent of publications, followed by Taz and Almkalla with 3% of the publications in each city.

Figure30 : Independent publications by geographic location



For more information, a list of independent publications by geographical location and periodicity of publication can be found in Annex 3.

4.2 Yemen's Independent Media: Barriers and Constraints

Financial Instability

- Financial instability constitutes one of the main challenges for Independent media outlets. It is attributed to lack of advertisers, poor circulation of independent newspapers and unavailability of alternative funds.
- The low number of advertisers is due to lack of interest and fears of governmental reprisals.
- The poor circulation is due to high rates of illiteracy, widespread poverty, poor infrastructures making difficult the distribution of copies, and the confiscation of copies by the government.
- The lack of expertise is a main constraint when intending to expand the number of advertisers or increase the distribution of the publications.
- Most of the identified alternative sources of finance for independent media outlets are seasonal or biased, and do not constitute a viable alternative

Human Resources Constraints

- Independent media outlets faces difficulties on hiring qualified personnel for virtually all departments. In addition, they lack standardized hiring schemes and failed to provide employment contracts and codified policies to their employees.

Legal and Financial Barriers

- The legal and administrative procedures constitute the top tier challenges to starting an independent media outlet in Yemen. The lengthy process of obtaining a license, corruption during the license acquiring process and a political view other than that of the government are just some examples of such challenges.
- Yemen's press law greatly restricts the issues which can be addressed by publications burdening the ability of the independent media outlets to effectively report.

4.2.1 Financial instability

Financial instability constitutes one of the main challenges faced by independent media outlets. This financial insecurity is mainly attributed to (1) lack of advertisers, (2) poor circulation of independent newspapers, (3) lack of expertise among the staff and (4) unavailability of alternative sources of finance.

Based on their current levels of funding, most respondents admitted that they did not feel financially secure. On the availability of funds for future fiscal planning, half of the respondents denied having sufficient funds, which was seen by the publications as a main burden to plan for medium and long term time periods.

"The scarcity of financial resources is a great weakness for us... Many problems emerge due to the lack of money, like the feeling of unrest among employees and the feeling of the possibility of stopping and ending the publications work," said one editor-in-chief.

4.2.1.1 Scarcity of Advertisers

Advertisements constitute the greatest source of income to independent media newspapers, according to the majority of interviewees. However, this main source of funding is not abundant. *"Advertisements are the greatest source of income in spite of their scarcity"*, summarized one editor-in-chief.

The reasons for this scarcity of advertisers were identified as follows by respondents:

- Lack of interest from the potential advertisers: General awareness about the benefits of advertising in independent media outlets remains very low among potential clients. *"Investment in*

media is seen as useless" an editor-in-chief of an independent publication said. According to some respondents, the limited edition, distribution and readership of publications, also causes of the independent media outlets financial instability, does not encourage companies NGOs and CSOs to seriously advertise in local print media. (Note: hereafter its necessary to draw attention to the time of starting the study as the same of the previous disclaimer regarding the president)

- Political view of the publications: There is the general impression among interviewees that the political view of a publication significantly affects its number of advertisers. This is due to fears of Government's posterior reprisals. "Many advertisers avoid advertising in independent media outlets due to the fear of being considered in opposition to the regime and then to be hurt by governmental bodies" an editor-in-chief explained. In addition, some advertisers reportedly received directions from either the ruling party or state authorities to stop advertising in publications which address controversial issues "Some advertisers stop advertising with us either because of addressing controversial and hot issues unfavorable to the government or after receiving calls from governmental bodies to asking them to stop advertising with us," a distribution manger said.

4.2.1.2 Poor Circulation

The publications' sales were widely reported to be the second greatest source of funding for independent news outlets. However, the circulation of independent newspapers remains low mainly due to:

- High illiteracy rates: *"The illiteracy rate is high in Yemen which causes stagnancy and reluctance to buy publications"*, stated a distribution manager in one publication.
- Widespread poverty: the purchasing price of independent publications appears to be very high for the average Yemeni consumer *"The publication's price is nothing in comparison to the printing cost (but) people are poor and if we raise the price, they won't buy it and will go to other newspapers"* commented a chief editor in an independent publication.
- Poor infrastructures: Far-off population centers, poor infrastructure and the general lack of transportation difficult the distribution of newspapers, further hindering an increase of sales.
- Confiscation of publications' copies: Governmental confiscation of a publication's copies affects the enterprise's sales and subsequently its overall funding. According to one editor-in-chief *"we are somewhat afraid that the government may close the publication or confiscate publications at any time, and then everything will end"*. *"We suffered a lot from the government where it confiscated copies of our publications"* a reporter in an independent publication said, commenting on the negative effects of the confiscation on the publication's budget.

4.2.1.3 Lack of expertise among the staff

Many representatives of media outlets complained about the lack of qualified personnel in their publications, able to increase and manage the relations with advertisers. *"One of the main obstacles I face in regards to finance is the lack of skillful and experienced public relations team,"* said an editor-in-chief in this context. The lack of competences is seen as having a negative impact on both the number of advertisers attracted and on the number of newspapers sold. *"One of the main greatest weaknesses is that our distribution and public relations teams are not skillful and qualified enough to distribute properly"*.

Employing unqualified and unskillful employees was seen as the result of the significant lack of human capacities and was thus considered as one of the greatest weaknesses by many publications. One respondent reported it is difficult to find skillful and qualified personnel and added that he faces the same problems in other departments where the competence level of employees negatively affects the sale of publications and its professionalism.

By means of contrast, one general manager commented "We have qualified and skillful staff either in editorial department, distribution or public relations and that makes sales go smoothly." Thus, in the Yemeni context, a qualified staff is widely considered to be one of the most important factors in the financial status of independent publications.

4.2.1.4 Unavailability of alternative sources of finance

When asked to name other forms of funding, the vast majority of interviewees were unable to identify further sources of finance and commented on the limitations of the additional sources mentioned below:

- Government advertisements: A minority of interviewees claimed that government advertisements constitute 5 to 10 percent of the publications' overall funding, while a similar number stated that government advertisements contribute 15 to 20 percent to the overall funding. This low level of government advertisement is apparently due to the reluctance of governmental bodies to advertise in independent publications, as they consider independent publications a threat to the state. When doing that, governmental bodies are said to advertise in an effort to influence the publication's writing *"Some governmental institutions advertise in our publication in order to tempt us to stop writing about unfavorable issues to the government"*, said an editor-in- chief.
- Government subsidies: Delays of three months or more and corruption on the procedures were mentioned by interviewees when speaking about the one hundred thousand YR government subsidy annually allocated to independent publications. *"We receive a subsidy of 100 thousands YR annually, but we wait more than three to five months "* an editor-in-chief mentioned. One respondent admitted that high ranked officers from the Ministry of Defense gave subsidies to his publication in order to refrain on reporting about issues related to corruption: *"Indeed, we and many other publications receive some subsidies from high ranked officials in order to make us overlook hot issues that the state hates to be addressed."*
- Bank loans: The high investment costs, low public interest, and the risk of governmental interference all nurture the perception of banks that independent publications remain a high-risk target for investment

and consider them as "vulnerable to government closure and unlikely to generate enough revenue to be able to pay the loans back", as stated by one editor-in-chief. As a result, banks often refuse to provide loans for independent publications. Additionally, personal assumptions by independent state owners of being unable to provide the required guarantees prevented them to request bank loans. *"Their conditions are unfair and they ask for unavailable financial guarantees"* one editor-in-chief said.

Religious reasons were also mentioned by respondents for not requesting bank financial backing: *"We never thought of taking out loans from the bank, as it is forbidden by God"*, one distribution manager noted.

In cases where publications responded positively to having made use of external loans, the amounts received varied. One respondent mentioned one million YR whereas another said two million YR, while yet again two others noted that the loans of their publications are between 20 and 23 million YR.

- Advertisements by political parties and on national and religious occasions: *"Political parties and some people provide independent publications with unconditional funds, but they are seasonal"*, commented one editor-in-chief. (Disclaimer to the period of talking about advertisements and funds)
- News websites: Many respondents complained about the lack of interests in advertisements in independent publications. *"There is no interest in advertisements, especially concerning news websites. Even the US embassy does not believe in the feasibility of advertisements of its programs in news websites"* an editor-in-chief said.
- SMS news services: Although some publications are able to make use of SMS news services, various interviewees reported that they had been denied permission, since the lawmaking process regarding the spreading of news by SMS was officially not completed.

4.2.2 Human Resources Constraints

The following chapter addresses barriers and needs related to human resources hindering the efficient running of independent publications in Yemen. In particular, (1) the lack of qualified personnel, (2) the lack of standardized hiring procedures, and (3) the inexistence of employment contracts and written policies.

4.2.2.1 Lack of Qualified Personnel

Difficulties to find qualified personnel for virtually all departments of the publications is a major concern for independent media outlets. *"It is difficult for us to find professional employees specialized in advertisements, distribution, public relations, and specialized journalists"*, said one editor-in-chief. *"We suffer from lack of qualified distributors and public relations representatives"*, stated another respondent.

Due to the nature of topics usually covered by independent news outlets, the need for reporters and editors with a strong understanding of investigative journalism came on top of all needed specializations.

"All of our news are political and the team has little experience in editing news, thus we consider this as the greatest weakness", one editor-in-chief stated.

Difficulties to find qualified correspondents outside Sana'a were also mentioned, limiting the area of work of the independent media outlets. *"If we do not have correspondents in the area of events, we contact the local council members, sheiks, citizens, civil society organizations, offices of political parties and human rights activists"* and a posteriori, gather the information in Sana'a, said an editor-in-chief.

Due to the overall poor levels of education as well as the lack of practical experience, employees lack training and expertise. In this context, the majority of respondents mentioned the urgent need for professional training geared towards increasing professionalism and journalistic skills. Respondents particularly stated the need for training specializing in investigative, political, economic and humanitarian reporting. With a similar sense of urgency, respondents expressed the need for training in management, marketing and advertisements. Various respondents also reported on the need for training on legal protection against government interference.

4.2.2.2 Lack of standardized hiring Procedures

Independent media outlets generally lack standardized requirements and procedures for hiring new personnel. The reasons behind the lack of standardized hiring procedures were identified by interviewees as:

- Absence of long term human resources strategy which leads to the constant dropout of qualified journalists. As stated by one editor-in-chief *"we face the difficulty of keeping employees... they leave us once they find a better position and salary"*.
- Lack of internal regulations ruling the publications: *"We don't have written standards because we don't have an internal by-law"*, said one accountant interviewed.
- Small size of the independent media outlets.
- Use of individual experience, traineeship and personal recommendations instead of hiring schemes.
- Nature of work carried out. One respondent stated that as the nature of work is practical, *"we test the employee for three months, and then we decide whether or not to accept him permanently"*.
- The respondents who said that their publications do have set standards for hiring employees mentioned competence, experience, capability, performance, knowledge, sponsorship, specialization, discipline and qualifications as the main criteria for hiring candidates. *"The standards we adopt are capability, experience and then qualification"* a general manager stated.

4.2.2.3 Inexistence of Employment Contracts and Codified Policies

Employment contracts are inexistent in most of independent media outlets or limited to top positions in the publication including the editor-in-chief, managing editor, head of the financial department and reporters.

Only a minority of interviewees affirmed all staff in their media outlet had a contract, with a similar low number of respondents stating that contracts do not exist in their publications. About half of the respondents reported on having contracts for some specific positions. *"We give contracts to reporters, especially staff reporters and heads of departments"*, a distribution manager said.

Identified reasons among interviewees for the inexistence of employment contracts were:

- High cost of benefits associated with formal contracts such as medical insurance.
- Uncommon practice in the country: *“No one among staff asked for a contract”* an interviewee stated.

Slightly surprising, some publications provide contracts to new staff members, while not providing contracts to the founding staff members. "Contracts are given only for new reporters, administrators and technicians but not the founding staff members," noted one distribution manager. Some publications provided contracts only in cases in which the employee explicitly demanded a written agreement.

Written policies and standards defining work times, obligations, employees' rights and vacations are not commonly used among independent publications. The reasons identified by interviewees for not having written policies were:

- Existence of unwritten established norms: "They don't exist on paper, but there is a norm where the technical department adheres to work times on Thursdays and they know work time, leaving time and deadlines of submitting work", one editor-in-chief commented.
- Existence of instructions and generalizations commonly placed on boards.
- No need of written codes of policies and conducts due to the small size of some publications' staff.
- Existence of written policies restricted to specific posts. "There is a written standard just for the editorial department, which involves the tasks and duties of everybody and they are set out on the wall", an independent publication chief editor said.
- Inefficiency of written policies in previous experiences: Some publications reported having provided written policies and standards in the past, but having canceled these due to problems encountered in the financial or administrative domain. In this context one respondent said: "There was a sign-in sheet, jurisdictions for the top positions like editor-in-chief, and editing manager, but due to reasons related to administrative troubles and financial crisis we didn't follow the standards and policies manual".

4.2.3 Governmental Interference

Independent publications suffer from interference from various sections of the government, including several ministries and state security bodies. This chapter analyses (1) the “red lines” prompting this interference when crossed by the independent media outlets, (2) the different types of interference by the government and (3) the effects of this interference and the reaction of the independent media to face it.

4.2.3.1 Read Lines in Reporting

Respondents stated independent media outlets in Yemen often encounter strict boundaries in terms of what is permissible to publish about. The identified “red lines” in reporting by the interviewees were:

- The president and the characteristics of the regime: Red lines include reporting on the president as well as the private business of the president's relatives or, as defined by one editor-in-chief, to comment on *"the president, his family members and their corruption"*. Another interviewee reported as impossible to *"write about the autocratic reign and military regime."*
- National security issues and Yemen's unification: reporting on the southern separatist movement, the Sa'ada wars and the Houties rebellion, as well as Al-Qaeda has become highly difficult, with the government imposing severe control. The severity of the control can be seen with the comments provided by one respondent. He stated that he was unable to write about Al-Qaeda, going so far as to say he was *"not ready to sacrifice his life and family or to spend the rest of his life in prison"*
- Corruption issues: Independent publications are forbidden to comment on corruption, especially concerning high government officials involved in the state's oil and gas bargains.
- Social and religious beliefs: Tribal sheiks and religious clerics channelized their interference to independent media via the government, through its capacity of lobby. *"If we write against social or religious beliefs, they will close the publication"*, stated one of the interviewees.

4.2.3.2 Types of Interference

Yemen's government use different tactics to exert pressure on the independent media outlets. Respondents mentioned a wide variety of reprimands faced by publications when trying to report in the above-mentioned issues.

- Confiscation of materials: Penalties identified by the interviewees included confiscation of journalistic materials and equipment used in the daily operations of publications or journalists by security and other governmental bodies, including mobile phones, laptop computers, cameras or stocks of printing paper.
- Bans on reporting: Interviewees indicated been imposed bans on reporting for up to five months for non-severe cases. In more severe cases, respondents reported about life time working-bans for journalists.
- Court lawsuits: Individual representatives of a publication may be taken to court, where they face sentences of up to five years of imprisonment. The process is usually initiated by one of the ministries filling in a lawsuit against a specific publication or journalist. The vast majority of respondents stated that they or their publications were asked to the court. An editor-in-chief stated that the Ministry of Defense filed in a lawsuit in which they accused the publication of revealing military secrets. One financial and administrative manager affirmed that they were currently facing a trial for a corruption lawsuit filed by the deputy of the Ministry of Youth.
- Suspension of newspapers and websites: 8 newspapers were suspended by the government in May 2009, namely Al-Ayyam, Al-Masdar, Al-Watani, Al-Diyar, Al-Nida, Al-Shari, Al-Mustaqila and Al-Ahali under the pretext of defending Yemeni unification. New websites were reportedly blocked on the grounds of national security. In this context, websites of media outlets especially faced severe governmental control during times the six wars in Sa'ada as well as when the protest movement in the southern governorates became more active.

- Abduction, imprisonment and physical punishment: On the more drastic end of governmental repercussions various interviewees also mentioned abduction, imprisonment and detention as consequences of 'unfavorable reporting'. "I was abducted by military forces in August 2005" said one respondent. Moreover, other respondents went on to say that journalists may be exposed to corporal punishment. In addition two respondents described incidents in which they and/or their families had been physically attacked by unidentified persons for what they believed were reasons related to their occupation in a specific media outlet. In the past few years a large number of well-known journalists were arrested and tried for reporting on what the government considers to be sensitive issues. Arrested journalists included: Mohammed Al-Maqaleh (Al-Ehsteraki Net), Moneer Al-Mawri (Al-Masdar Newspaper) and Abdulelah Shae'e (Freelance journalist specialized on Al-Qaida).
- Censorship when using governmental presses: Many independent publications do not own printing presses and resort to state's printing facilities. In control of these facilities, the Ministry of Information is able to preview and censor all material of independent publications using such printing facilities. "*All material in the publication are subjected to prior monitoring and in many cases they required us to change some materials*" one editor-in-chief said.
- Limitations on the periodicity of the publications: some respondents felt their publications were not allowed to be issued daily, adding that this would give them the chance to independently address a wider variety of issues. In addition, the Ministry of Information requires daily papers to use the Ministry's printing press, greatly raising the risk of state censorship as seen in the previous point. Respondents reported that interference and monitoring by the government caused late arrival of their publications to the markets, subsequently affecting their publication's sales, financial status and reputation.
- Pressure on advertisers: A distribution manager stated that advertisers sometimes receive directions or phone calls to stop advertising with this publication, intended at limiting the economic revenue of the publication.
- Lack of government's collaboration: The refusal to share statistical information by official authorities was identified as another significant burden to independent media reporting. Government bodies deliberately refused to hand out information according to respondents. On the other hand, some respondents assumed that the government bodies simply do not have precise statistics.

4.2.3.3 Reaction of the Independent Media Outlets

Regarding the effects caused by governmental interference on independent media and journalists, the psychological effect of governmental threats appears to have an impact on reporting.

Various respondents reported that they were scared and feared for the safety of their families. "*Of course I was scared and afraid for my children and family*", one editor-in-chief stated. Consequently, some independent journalists and media have imposed self-censorship: "*The threats created...self-censorship, so when we come to write about something we find that we hesitate and start thinking of consequences,*" an editor-in-chief affirmed.

On the other hand, numerous respondents stated that deliberate interference increased their vitality and enthusiasm to pursue work in the media and journalistic domain.

Regarding the ways independent media tried to confront governmental interference, several options were mentioned by the respondents including:

- Turning away from state printing facilities in order to acquire more freedom in reporting. A representative from the private media sector adds: *"Once we were not allowed to print the publication as it contained news about the Southern Movement. So we resorted to a private printer."*
- Turning to lawyers, other press agencies, CSOs and NGOs for assistance.
- Meeting state representatives to discuss the issue. One respondent revealed that his publication had had a meeting with the Minister of Telecommunication who committed to start investigating the blocking of media websites.

Only a minority of interviewees affirmed having changed the content of their material.

4.2.4 Legal and Administrative Barriers

This chapter discusses (1) the legal and administrative barriers hindering independent media outlets during the foundation process and (2) the legal and administrative barriers burdening independent media operations in Yemen identified by interviewees.

4.2.4.1 Legal, Ministerial and Administrative Barriers to Starting a Media Outlet

The majority of interviewees identified legal and administrative procedures as the top tier challenges to starting a newspaper or other media outlet in Yemen. The main obstacles identified by interviewees were:

1. The lengthy process of obtaining a publishing license, lasting from three to five months.
2. Corruption during the licensing process

"We have to spend several months and give much money for employees till we obtain a license," one editor-in-chief said.

According to the interviewees, the slow working process of state employees and the lengthy bureaucratic process was due to the government's investigation of the publication's founder followed by intentional procrastination of the licenses requested by owners been suspected of having opposition views.

Corruption during the licensing process was mainly occurring in form of bribes to be paid to governmental institutions employees.

Additionally to these two main obstacles: corruption and procrastination, additional constraints to the opening of new independent media were identified by the respondents as follows:

- Legal formality of having a university degree in media studies.

- Preexisting fears of governmental repercussions (closure of publications and websites).
- Oppressive nature of the national press laws

"The laws, especially the Press and Publications Law, are one of the biggest barriers facing us in starting publications" one editor-in-chief reported.

4.2.4.2 Legal, Ministerial, and Administrative Barriers to Operating a Media Outlet

The Press and Publication Law

The Press and Publication Law was identified by the vast majority of respondents as the main obstacle when operating an independent media outlet, having a limiting impact on the subjects included in the independent newspapers.

This law, passed in 1990, sets out a number of "prohibitions" on what can be published sufficiently vague to include virtually any topic. Article 103 prohibits publication of "*anything which leads to the spread of ideas contrary to the principles of the Yemeni Revolution, prejudicial to national unity or distorting the image of the Yemeni, Arab, or Islamic heritage*", in addition to any criticism to the president.

"Everything is banned in the Press and Publication law", one editor-in-chief stated.

Consequently, publications try not to publish on sensitive subjects without having enough documented evidence in order not to be put on trial in court. "*We are very careful about social and religious issues as these aspects are very sensitive... in case we are asked to the court due to writing something wrong or violating social or religious issues, the publication will lose its reputation and may be attacked by a social group,*" one editor-in-chief said.

Respondents also stated the law is often implemented seemingly at random to punish publications or particular media representatives who cross 'red lines'. As one editor-in-chief stated: "*The press law prevents publications from addressing very many issues, even using the picture of the president in the publication, but the government overlooks this law and uses it when we write about some sensitive issues.*"

The Specialized Press and Publication Court

Less frequently albeit significant in its nature, respondents identified the Specialized Press and Publications Court (Muhakama al Sahafa al Mutakhasisa) as a burden to their media enterprise.

The Specialized Press and Publications Court was established in May 2009, after the government suspended eight newspapers. Since its establishment, the court issued various rulings against local journalists and media outlets. For example, in November 2009 the court issued a ruling against the editor-in-chief of Al-Masdar Newspaper, who was sentenced to one suspended year in prison, in addition to being prohibited from any journalistic activity for one year. Also working with the publication Al-Masdar, journalist Moneer Al-Mawri was sentenced to two years in prison and given a life-long

publication ban in Yemen. The court also vindicated Al-Masdar newspaper of accusations filed by the Ministry of Endowment and Guidance after publishing articles about corruption in the Ministry.

Human rights groups have expressed concerns over the legality of the SPPC and suggested it is a tool to stifle freedom of expression.

New electronic media law

The draft electronic media law the previous government intended to implement, which was prepared by the Ministry of Communications and the Ministry of Information, was also highlighted by the interviewees. "*The new law of electronic media poses fees of 15 million YR to start a new website, which is impossible for many people to raise*" a chief editor said. However, this law –although announced- was not approved. The new government is, indeed, preparing a new law on electronic media, its content aiming at ease the opening of new electronic media. "

4.3 Suggestions and Recommendations

The following chapter offers a set of recommendations aimed at improving the financial resources of the independent media outlets, as well as their distribution, circulation and periodicity; (2) the skills of competences of existing and future professionals working on independent newspapers; and (3) the legal environment ruling Yemen's press in order to achieve a greater degree of freedom of information and expression.

4.3.1 Increased Circulation, Distribution and Periodicity

The main source of funding for independent media outlets are advertisements. However, advertisers seem to be reluctant to place their adverts in independent media outlets due to their low circulation, periodicity and distribution. An improved circulation, distribution and periodicity of the independent news outlets, together with a more qualified PR staff, would lead to greater interest of advertisers on independent media outlets.

- **Distribution:** As the respondents of the survey stated, they would be interested on reading more sources of printed media. However, the limited access is one of the main problems faced. To increase the venues where independent newspapers can be sold, including street sellers, grocery stores, fruit/vegetable markets or grocery stores would ease the general public access to these publications.
- **Periodicity:** The two preferred newspapers selected by respondents were both daily newspapers. To increase the periodicity of independent newspapers could lead to an increase of readership and help to foster existing customers' loyalty.
- **Circulation:** A strong majority of respondents affirmed they would like to see more articles on security issues, news about their governorates, and regional and international news. To increase the number of news on these issues to match the general public desires could attract greater audience to the independent media outlets.

Thus, these publications would receive greater financial resources which would allow them to increase circulation and periodicity, breaking the existing vicious circle..

4.3.2 Training and Education

As seen before, one of the main challenges for independent newspapers is the lack of qualified personnel. To tackle this lack of skills, emphasis should be put at two levels:

- **University education:** One recurrent practice is to hire experienced staff or to train their own junior personnel since publications cannot resort to recent graduates. To promote a reform of the journalism studies syllabus at university level should be considered, in order to better match the professional demand.

- Professional Training: Existing professionals should be able to access continuous professional training programs in order to update their competences and skills and fill existing gaps.
- Training on digital media and new technologies: Training on digital media and new technologies should be a priority, due to its future potential and low cost.
- Training on investigative journalism: Due to the nature of topics usually covered by independent newspapers, investigative journalists are often demanded. To offer specialization on investigative journalism to existing professionals would benefit both publications and professionals.
- Training to editors and owners: : Specific training should be considered for editors and owners on how to prevent official harassment and how to improve business and human resources management.
- Training on public relations and advertising: Emphasis should be put on enhancing the public relations and advertising skills of independent media staff. The lack of advertisers is one of the main problems faced by independent media outlets, being the lack of interest of the advertisers one of the main reasons for not advertising on these publications. A professional public relations and advertising team would be able to expand the number of advertisers.

4.3.3 Legal and Administrative Measures

As seen before, Yemen's press laws are one of the main burdens for independent media outlets. To face legal challenges three steps should be followed:

- Improve the legal-enabling environment: To improve the legal-enabling environment should be one of the priorities when trying to strengthen independent media in Yemen. A clear and precise press law would avoid different interpretation on what is permitted to publish about, giving the independent newspaper room of maneuver to publish on issues classified as "sensitive" as well as a legal reference to refer if brought to court.
- Ensure effective law enforcement : As in the case of the new electronic media law, it seems that Yemen's new government is moving forward to create the above-mentioned favorable legal environment. Thus, it is important to ensure that new and existing laws easing the work of independent media outlets are enforced. In that sense, the training of judges and prosecutors on the importance of independent media and freedom of expression should be considered.
- Tackle corruption at administrative level: At the administrative level, corruption should be tackled to assure new licenses are issued in acceptable time frames and no bribes are required. At the same time, awareness should be raised among independent media owners about the long term disadvantages of submitting to corrupt practices due to the possibility of their perpetuation.

Annexes

Demographics of the Sample

Table 5. Gender

Gender	
Male	51%
Female	49%
Total	100%

Table 6. Age

Age	
15-24	42%
25-34	33%
35-44	15%
45-54	7%
55+	4%
Total	100%

Table 7. Education

Education	
No formal education	8%
Primary (some or completed)	15%
Middle school (some or completed)	17%
Secondary school (some or completed)	35%
Post-secondary[†]	25%
Total	100%

Table 8. Marital status

Marital Status	
Single	41%
Married	57%
Divorced	2%
Widow/widower	1%
Total	100%

Table 9. Comfort with income

Comfort with Income	
Live comfortably	15%
Can get by	49%
Life is difficult	34%
Don't know	2%
Total	100%

Table 10. Income Level

Reported Household Income	
Less than 20,000 YR	16%
20,001 - 39,000 YR	27%

[†] Post-secondary diploma, some university, completed university, and advanced degree.

40,000 - 59,000 YR	23%
60,000 - 79,000 YR	9%
80,000 - 99,000 YR	5%
100,000 - 119,000 YR	3%
120,000 - 139,000 YR	1%
140,000 - 159,000 YR	1%
160,000 - 179,000 YR	0%
180,000 - 200,000 YR	1%
More than 200,001 YR	1%
Don't know	13%
Refused to answer	1%
Total	100%

Table 11. Employment

Are you gainfully employed?	
Yes	43%
No	41%
Housewife	17%
Total	100%

Table 12. Status of the Unemployed

Status of Unemployed	
Housewife	25%
Student	18%
Retired	1%
Disabled	0%
Very old	1%
Unemployed, seeking job	10%
Unemployed, not seeking job	2%
N/A (currently gainfully employed)	43%
Total	100%

Table 13. Governorate

Governorate	
Ibb	10%
Abyan	3%
Sana'a City	9%
Albaidha	3%
Taiz	11%
Aljawf	3%

Hajjah	7%
Alhodeidah	10%
Hadramout	5%
Dhammar	6%
Shabowah	3%
Sa'adah	3%
Sana'a	4%
Aden	3%
Lahj	3%
Maa'reb	3%
al-Mahweet	3%
Al-Mahrah	3%
Amran	4%
Al-Dhalea	3%
Reemah	3%
Total	100%

Registered Newspapers and Magazines in Yemen[‡]

Number of registered newspapers and magazines in Yemen by periodicity

Governmental official and Semi-official	Daily	4
	Weekly	7
	Bi-Monthly	3
	Monthly	14
	Quarterly	10
	Total	38
Political Parties	Daily	0
	Weekly	26
	Bi-Monthly	2
	Monthly	6
	Quarterly	0
	Not specified	10
Total	44	
Independent	Daily	3
	Weekly	55
	Bi-Monthly	12
	Monthly	24
	Quarterly	2
	Not specified	80
Total	175	
Total	Daily	6
	Weekly	88
	Bi-Monthly	17
	Monthly	44
	Quarterly	12
	Not specified	90
Total	257	

[‡] Source: Yemen's Ministry of Information

List of the magazines and newspapers registered in Yemen based on their periodicity and place of issue

Publications' name	Periodicity	Location
1. Al-Ayyam	Daily	Aden
2. Akhbar Al-Yawm	Daily	Sana'a
3. Al-Sahwa	Weekly	Sana'a
4. Al-Rai Al-Ame	Weekly	Sana'a
5. Al-Balagh	Weekly	Sana'a
6. Al-Yemen Al-Saeed	Weekly	Sana'a
7. Al-Horiyah	Weekly	Sana'a
8. Yemen Times	Weekly	Sana'a
9. Sana'a	Weekly	Sana'a
10. Attareeq	Weekly	Aden
11. Ash-Shomoa'	Weekly	Sana'a
12. Al-Haq	Weekly	Sana'a
13. Al-Osboo'a	Weekly	Sana'a
14. Yemen Observer	Weekly	Sana'a
15. Al-Nahar	Weekly	Sana'a
16. Al-Nas	Weekly	Sana'a
17. Al-Ebhar	Weekly	Sana'a
18. Al-Dyiar	Weekly	Sana'a
19. Wahg Al-Haqeeqah	Weekly	Sana'a
20. Akbar Al-Reyadah	Weekly	Taiz
21. Al-Adwa	Weekly	Sana'a
22. Al-Ahed	Weekly	Sana'a
23. 17th of July	Weekly	Sana'a
24. Al-Roshd	Weekly	Almukalla
25. Al-Wasat	Weekly	Sana'a
26. Al-Neda	Weekly	Sana'a
27. Al-Tahdeth	Weekly	Aden
28. Al-Zagel	Weekly	Sana'a
29. Sport	Weekly	Aden
30. Al-Iewa	Weekly	Ibb
31. Aldestor	Weekly	Sana'a
32. Al-Ghad	Weekly	Sana'a
33. Al-Sharae (street)	Weekly	Sana'a
34. Finace and Business	Weekly	Sana'a
35. Al-Wastah	Weekly	Alhudeida
36. Al-Ahali	Weekly	Sana'a
37. Eilaf	Weekly	Sana'a
38. Yemen Post	Weekly	Sana'a
39. Al-Masdar	Weekly	Sana'a
40. Al-Jumhor	Weekly	Sana'a
41. Al-Shawahed	Weekly	Amran
42. Al-Eqtasad & Al-Uawm	Weekly	Sana'a

43. Hadith Al-Madina	Weekly	Taiz
44. Tawdhif	Weekly	Sana'a
45. Al-Youm Alsaba	Weekly	Taiz
46. Tarweej	Weekly	Dhamar
47. Al-Alaqat Al-Tijaria	Weekly	Sana'a
48. Al-Yemen	Weekly	Sana'a
49. Akhbar Aden	Weekly	Sana'a
50. Al-Manaber	Weekly	Aden
51. Al-Omna'a	Weekly	Shabwah
52. Shoot	Weekly	Aden
53. National Yemen	Weekly	Aden
54. Alyaqeen	Weekly	Sana'a
55. Alshabakah	Weekly	Sana'a
56. Almal'ab	Weekly	Aden
57. Alhurra	Weekly	Aden
58. Sout Al-Iman	Monthly	Sana'a
59. Naba'a Al-Haqeeqah	Monthly	Sana'a
60. March	Monthly	Sana'a
61. Al-Montada	Monthly	Sana'a
62. Al-Estethmar	Monthly	Sana'a
63. Najah	Monthly	Sana'a
64. Al-Arabia Assaida	Monthly	Sana'a
65. Al-Sehyia	Monthly	Sana'a
66. E'emar	Monthly	Sana'a
67. Yemen Motors	Monthly	Sana'a
68. New Horizons	Monthly	Sana'a
69. Abwab	Monthly	Sana'a
70. Al-Raseid	Monthly	Sana'a
71. Arous Al-Yemen	Monthly	Sana'a
72. Shababeek	Monthly	Not specified
73. Thaqafatuna	Monthly	Sana'a
74. Al-Mustamir	Monthly	Sana'a
75. Alhubul Economy	Monthly	Sana'a
76. Alahashmi	Monthly	Sana'a
77. Mahttat	Monthly	Sana'a
78. Addaleel Arraqmi	Monthly	Sana'a
79. Shabab Alyoum	Monthly	Sana'a
80. Sell & Rent	Monthly	Sana'a
81. Technology	Monthly	Sana'a
82. Al-Mar'ah (Woman)	Bi-Monthly	Sana'a
83. Al-Jazeera	Bi-Monthly	Sana'a
84. Al-Osra and Al-Tanmia	Bi-Monthly	Sana'a
85. Akhbar Alyemen	Bi-Monthly	Taiz
86. Almustakela	Bi-Monthly	Sana'a
87. Etejahat	Bi-Monthly	Sana'a
88. Al-Maidan	Bi-Monthly	Sana'a
89. Al-Tafasil	Bi-Monthly	Sana'a
90. Al-Muwatin	Bi-Monthly	Sana'a
91. Al-Sharq Al-Awsit	Bi-Monthly	Ibb
92. Yemen Buisness	Bi-Monthly	Sana'a

93. Awwam	Bi-Monthly	Sana'a
94. Real Estate	Quarterly	Sana'a
95. Yemen Today	Quarterly	Sana'a
96. Ash-Shrouq	Not specified	Ibb
97. Al-Naqed Al-Arabi	Not specified	Dhamar
98. Bazar	Not specified	Sana'a
99. Al-Forsan	Not specified	Sana'a
100. Al-Rasad	Not specified	Sana'a
101. Sada Al-Aswaak	Not specified	Sana'a
102. Al-Huqooq	Not specified	Sana'a
103. Aktesad Al-Aswaq	Not specified	Alhudeida
104. Al-Ayyam Al-Ryady	Not specified	Sana'a
105. Adwa Al-Shmoa magazine	Not specified	Aden
106. Nawafidh	Not specified	Sana'a
107. Al-Kalemah	Not specified	Sana'a
108. Som Pom	Not specified	Sana'a
109. Belqis	Not specified	Aden
110. World 21	Not specified	Sana'a
111. Mala'eb wa saiyarat	Not specified	Sana'a
112. Al-Manar	Not specified	Sana'a
113. Reymah	Not specified	Sana'a
114. Al-Ofok	Not specified	Raimah
115. Haban	Not specified	Sana'a
116. Al-Moharer	Not specified	Sana'a
117. Al-Baled	Not specified	Almukalla
118. Al-Morakeb	Not specified	Sana'a
119. Al-Rai Alhur	Not specified	Sana'a
120. Alwaan	Not specified	Taiz
121. Al-Adala	Not specified	Sana'a
122. Mobail	Not specified	Sana'a
123. Al-Mukala	Not specified	Sana'a
124. Yara	Not specified	Almukalla
125. Aba'ad	Not specified	Sana'a
126. Ein	Not specified	Sana'a
127. Al-Sarahah	Not specified	Almukalla
128. Shamsan	Not specified	Sana'a
129. Ghurodh and Qurod	Not specified	
130. For You	Not specified	Sana'a
131. Asalah	Not specified	Sana'a
132. Al-Watan	Not specified	Sana'a
133. Al-Jareidah	Not specified	Aden
134. Maraya	Not specified	Sana'a
135. Al-Watan Al-Youm	Not specified	Sana'a
136. Al -Kadiya	Not specified	Addalei
137. Al-Houia	Not specified	Aden
138. Al-Taiar	Not specified	Sana'a
139. Al-Hiah Al-Youm	Not specified	Almukalla
140. Tanmiat Al-Mugtama	Not specified	Sana'a
141. Kul Ahad (every Sunday)	Not specified	Sana'a
142. Sout Hadhramout	Not specified	Sana'a

143. Al-Hwadith	Not specified	Almukalla
144. Internet On-line	Not specified	Sana'a
145. Sa'aif	Not specified	Sana'a
146. On Line	Not specified	Sana'a
147. Al-Nawras	Not specified	Sana'a
148. Mashahir	Not specified	Sana'a
149. Yoomag	Not specified	Sana'a
150. Look	Not specified	Sana'a
151. Addar	Not specified	Sana'a
152. Atiaf	Not specified	Sana'a
153. Alshahid	Not specified	Sana'a
154. Alwaqt	Not specified	Sana'a
155. Alola	Not specified	Sana'a
156. Akhar Sa'ah	Not specified	Sana'a
157. Alsaidaly	Not specified	Sana'a
158. Raw'ah	Not specified	Sana'a
159. Alwatha'eqeyah	Not specified	Sana'a
160. Alawraq Alyemeniah	Not specified	Sana'a
161. Ashshora'	Not specified	Sana'a
162. Alan	Not specified	Sana'a
163. Zawiyah	Not specified	Sana'a
164. Alkhabar	Not specified	Sana'a
165. Yemen Fox	Not specified	Sana'a
166. Akhbar Alyamamah	Not specified	Sana'a
167. Yamanat	Not specified	Aden
168. Alshahafah	Not specified	Sana'a
169. Albadeel	Not specified	Sana'a
170. Hoqooqona	Not specified	Sana'a
171. La Voix du Yemen	Not specified	Taiz
172. Alsofara'	Not specified	Sana'a
173. Alyemen walkhaleej	Not specified	Sana'a
174. Al-Raqeeb	Not specified	Not specified
175. Adam wa Hawa	Not specified	Sana'a