

## Study of Converging Perspectives: Youth Viewership of Internet Video Content and Traditional Television Sets in Oman

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### Abstract

*The paper studies youth attitudes to convergence in the digital ecosystem of Oman. The research examines patterns of online video and traditional TV consumption by youth in the age group from 18 to 25 years. Broadband has enabled an age of convergence in Oman. Watching online videos is a favourite activity along with using internet for communication. The same young audiences are also watching a number of Free-To-air channels. Despite low internet penetration there is a portion of young population in Oman which is now on the Internet. The paper examines if this young net population of Oman equipped with broadband access is shifting from passive TV viewing to more interactive online video consumption. The market variables include online and satellite channel viewership, broadband availability, internet penetration, telecommunication services, barriers to internet usage, time spent watching TV and internet videos, and genres popular across online and TV platforms. These factors contribute to an understanding of choices being made by a sample of 100 young audiences and also reveal the extent to which convergence of broadband on multiple screens including TV, personal computers, tablets and mobile phones is prevalent.*

**Keywords:** Broadband, Online videos, Free-To-Air TV.

### *Methodology and Procedure : Qualitative and Quantitative*

The research tools used include a survey filled by 100 Omani youngsters in the age group of 18 to 25. All the youngsters including girls and boys who were enrolled in college. Qualitative analysis was done through discussions and group interactions based on questionnaire. Apart from sampling, information has been gathered from Omani data collecting agencies and published reports and books.

**Sampling:** Purposive sampling to reflect overall trend amongst Omani youth

**Population:** 3.5 Million

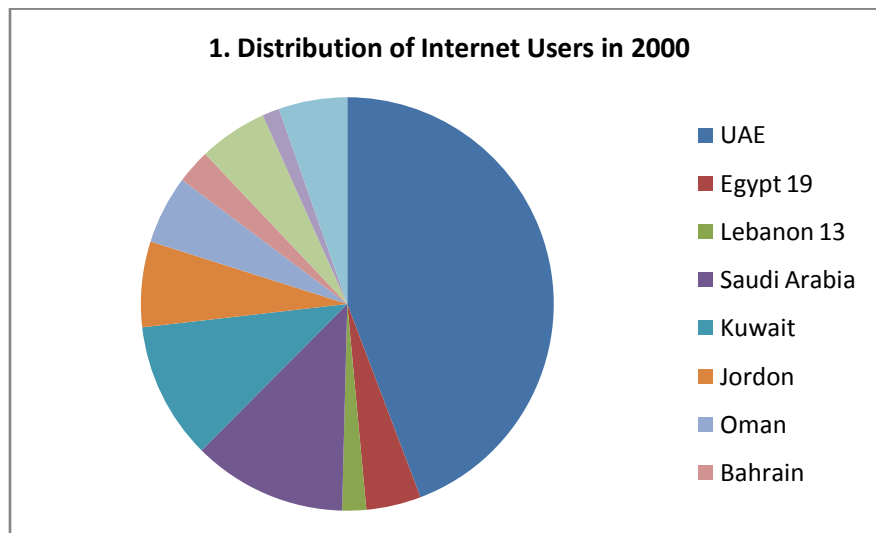
**Area:** 309500 sq km

**Hypothesis :** Omani youth who have access to broadband are now shifting from TV sets to online video content.

### *Introduction*

The Oman government's decision to increase Information and Communication technology has resulted in initiatives to expand internet penetration. The Sultanate today has diverse media platforms to meet its information, education and entertainment. Depending on which method is used to measure internet traffic, various public estimates find 25-40% of backbone network traffic is comprised of video and file-sharing traffic the level of consumer interactivity found in Web 2.0 services directly benefit from the heavy investment in broadband access and backbone networks over the last decade. ( Arab Outlook) . Globally internet penetration is quite high. According to a Reuters report a fifth of US viewers have put down the remote control and are clicking on a mouse to watch their favourite prime tv shows. The report showed that 50 percent of people viewing TV on the Web are watching programs as they become available and "appear to be beginning to use the computer as a substitute for the television set," Integrated Media Measurement Inc. (IMMI), which conducted the poll, said. Oman has yet to cope up with the challenge of increasing internet penetration. To achieve this target competition has been mobilised by telecommunication services Omantel and Nawras.

There are more than 500 free-to-air channels available on traditional television, while there are 2000 or more websites providing online videos. There are estimated 1,838,301 mobile and fixed line Internet users at present. In order to study convergent behaviours of these users, online video viewership is bound to be a determining factor to find out where Oman's young net community spends most of its time, watching videos online or in front of TV sets.

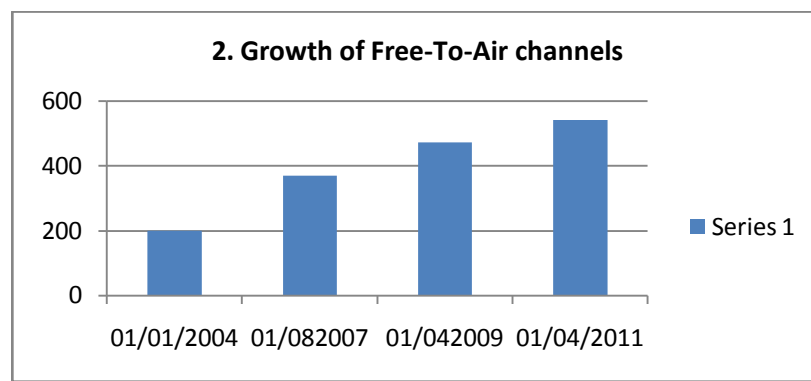


Source: ITU

### Television in Oman

Oman TV is the sole media provider with competition coming from home videos and satellite channels. Family values, traditions and culture are extremely important and so local programming is far greater influence than in other Arab regions. Omani state television imports less Western programming than some other Gulf states and tends to emphasize regionally contextual programming. Along with Oman TV more than 500 FTA channels in the region continue to meet the viewers needs. Oman saw 80% viewership of Nilesat's free to air channels in 2003. Satellite television channels are vying for Arab audiences by syndicating content, and creating programming to suit local tastes.

### 1. Continuous Growth in Free-To-Air Satellite Channels



Note: The satellite systems included in the analysis are Arabsat, Nilesat and Noorsat

Source: Arab Advisors Group's Satellite TV in the Arab World 2010, and Arab Advisors Group

The FTA landscape continues to expand. With satellite dishes available major pan - Arab pay tv platforms : Orbit, Showtime Arabia and ART provide programming to a 3 million population. Pay-TV faces strong competition from free-to-air channels and high levels of piracy. According to Arab Advisors Group research, by April 2011 the total number of distinct FTA satellite channels reached 538 on Arabsat, Nilesat and Noorsat, an increase of 10.5% over the number of channels recorded in April 2010 growth of 438% in the number of FTA satellite channels between January 2004 and April 2011.

While there may be a growth in the number of free-to-air channels yet out of this high number there are only a few that may be popular amongst audiences. This is reflected in the statistics collected in the sample. With liberalization of audiovisual sectors in the region, the number of private satellite channels exceeds the number of government owned channels. Over two thirds of the operational FTA satellite channels are privately owned.

### **Internet**

Internet services started in Oman in 1997. Initially online videos could not even be thought of as 50 % of the country never had an internet experience and half of it was not interested in having one. (The Report : Oman 2009 by Oxford Business Report). The general population of Oman was largely unaware of the benefits of Internet due to lack of awareness and high pricing. In the year 2009 it cost customers 70 \$ to 100 \$ a month to have a high speed connection. With the coming of Nawras, Omantel got a competitor and competition increased. Oman saw lower prices and better service. In 2005 when Omantel launched ADSL services, the age of broadbands was soon to give rise to convergence.

### **Broadband: Enabler of Convergence**

The launch of ADSL connections by Omantel paved the road to convergence in 2004. As telecoms and media converge, consumers have the option of accessing news, current affairs and entertainment content over televisions (free or pay), personal computers or their mobile phones. Broadband has brought a more personal viewing experience . With online video becoming mainstream audiences have ample choices available both in terms of content and devices to watch. There are estimated 1,838,301 mobile and fixed line Internet users at present. In developed countries more than 80 percent are watching audiovisual content via the web, short clips provided by YouTube and Facebook . Oman has just started to experience mobility of content. Before we look at the several dimensions related to popularity of online videos amongst Omani youth the terms internet TV and IPTV need to be demystified.

### **Internet TV and IPTV ( Internet Protocol Television):**

There exist key differences between IPTV and Internet TV - whether it be technical differences or delivery device (STB or PC).

Internet Television is the 'digital distribution of television content via the internet'. It is an alternative for viewers to typical broadcast television. Online video sharing can be called Internet TV. It includes access to online video content, both streaming live and on-demand. Internet TV relies on a much more *open* model by streaming content over the public internet and is available to the widest audience possible. It is a more personal experience than traditional TV (and IPTV) and is predominantly accessed alone, sitting by the PC.

IPTV however can probably be best compared to Digital Cable, with operators running a fully managed platform over a *closed* network with a limited reach. IPTV is more in tune with traditional TV (cable and DTH). IPTV also has the advantage of being more flexible especially with interactive services. However, the reality is that it is fundamentally a household product, allowing (but not limiting it to) communal viewing via what may be the primary TV set in the home. Across Europe IPTV is making its mark on the Pay TV industry with announcements such as Orange TV's (France) recent deal with Warner Bros. and HBO for first run movies.

IPTV in Oman is at a developmental and experimental stage. Oman's Telecommunications Regulatory Authority (TRA), has approved a project to test the technical feasibility of a larger broadband delivery scheme across the Gulf Sultanate. Fibre to the home pilot project has been approved to provide selected places with free high speed broadband internet connection, and related data rich services such as internet protocol television (IPTV) .

### **Broadband : Rise of online video content**

ABC World news was the first to broadcast news on internet in 1994 . Today the phenomena has become viral. As more video-sharing sites popped up in 2006-07, it became increasingly hard for major broadcasters to keep their shows offline. It became clear the Internet could actually produce revenue and not just siphon it away, major broadcasters such as NBC began making their shows available online, using advertising sponsors to cover expenses and turn a profit. The pinnacle of this effort can perhaps be seen in the launching of HULU on March 12, 2008. Several networks, both broadcast and cable, stream their videos and clips through a commercial-supported format at HULU. Major television networks include Hulu, MySpace, YouTube.

## Literature Review

The video store became a relic of a bygone era, as content migrated to the Internet. With increase in broadband bandwidth delivering high quality video over the Internet became a reality. Today, consumers can access television content through sites such as Amazon, Netflix, Hulu available only in United States, and premium channels, including ESPN3, HBO and National Geographic. Broadband bought a revolution where content could be shifted and used anytime. Web 2.0 content has concentrated on the tremendous volume of creation, posting and viewing of video content on media marketplaces such as MySpace, Orkut, YouTube and Facebook. In 2007, this activity led to a number of high profile transactions including the purchase of YouTube by Google for US\$1.65 billion and the US\$250 million advertising commitment from Microsoft to Facebook.

The growth of Internet television has been extremely useful internationally in distributing programming for the rest of the world, especially in areas like China and India, that don't have the infrastructure supporting access equipment like cable or ADSL lines. Domestically, this new venue offered an opportunity for media distribution with untold opportunity.

### Broadband in Oman

The Telecommunications Regulatory Authority a body corporate established under the Telecommunications Regulatory Act issued under the Royal Decree No. 30/2002, as a result of Government's initiative to liberalize the telecom sector in Oman and transform the monopolistic telecommunications market into a competitive one. Apart from the government initiatives, competition among the service providers is the other major factor contributing to the growth. It increased choices, made services affordable thereby increasing mobile penetration. Both Nawras and Omantel offered customers broadband internet connection via their third generation (3G) mobile networks, while Omantel also offers fixed line web access with speeds currently of up to 40Mbps. It was ADSL that brought about services to download, transfer files, chatting to the Omani consumers. The 56k dial up modems of the previous decade were too slow for streaming. Also downloading videos to a computer would take hours, and were often interrupted due to sharing dial up access with a regular phone line. As ADSL and cable, satellite broadband became available at rates the average consumer can buy tv shows, movies and videos started showing up online. Internet penetration is still far below as compared to global statistics, yet users have been rising since 2000.

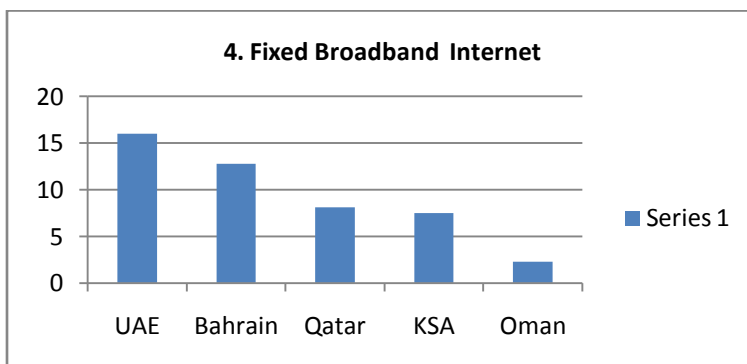
### 3. Internet growth and population statistics

Year	Users	Population	%Pop
2000	90,000	2,424,422	3.8 %
2002	180,000	2,398,545	7.5 %
2005	245,000	2,424,422	10.1 %
2008	300,000	3,311,640	9.1 %
2009	557,000	3,418,085	16.3 %
2010	1,236,700	2,967,717	41.7 %

Source: ITU

According to ITU, report the number of Internet users per 100 inhabitants increased impressively from 20 to 63 in two years, 2008 to 2010 (reached 78 by December 2011). Increase in users is attributed to use of internet for blogging, social media activities and rise of youtube culture. The broadband services are being used on pcs, mobiles and tablets

Omantel's revenues witnessed a growth of 9 per cent year-on-year to reach RO 453 million at the end of 2011. The growth was primarily driven by the broadband and data segment. Increase in number of mobile subscribers led to growth in retail mobile revenues, while improved fixed line revenue from its subsidiary — Worldcall Telecom Limited — has also supported the revenue growth. At the same time, the revenue of Nawras grew at a modest 4 per cent annually to reach RO 197 million. The Internet and data business segment has been the key driver for the increase in company's revenues during the year. The growth of broadband in Oman has multiplied the platforms of viewership. According to Nawras CEO Ross Cormack ' There is mobile broadband, home broadband and more mobile broadband'.



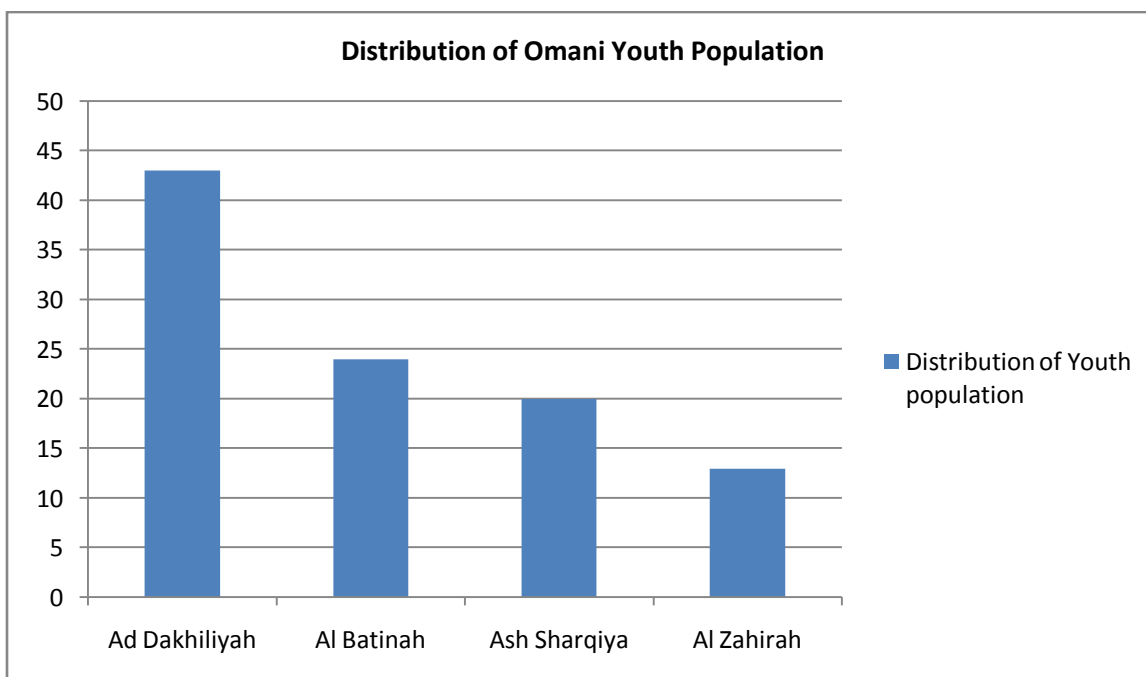
Source : Arab Advisors Group & OECD, Figures for end June 2010. Fixed broadband lines % of population

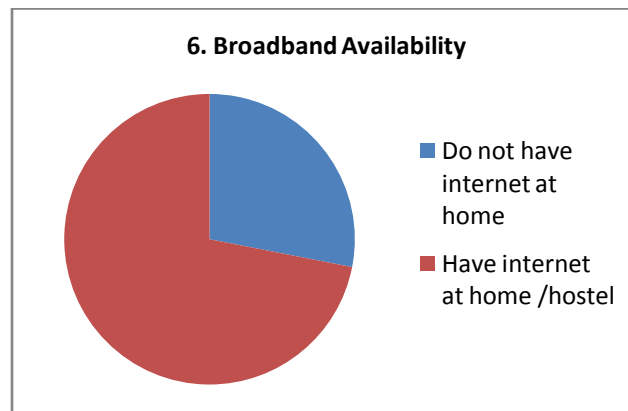
5. Types of Internet subscribers- Oman	June 11
<b>Dial Up internet Subscribers</b>	
Post Paid	10,479
Pre Paid	4,006
Total	14,485
<b>Fixed Broadband Subscribers</b>	60,654
<b>Mobile Broadband subscribers</b>	2,197,771
<b>Internet Users</b>	
Fixed Internet Users	435,806
Mobile Internet users	1,402, 495

Source: Telecom Market Indicators. Report Q2, ( Apr - June 2011)

**Sample study of 100 youngsters**

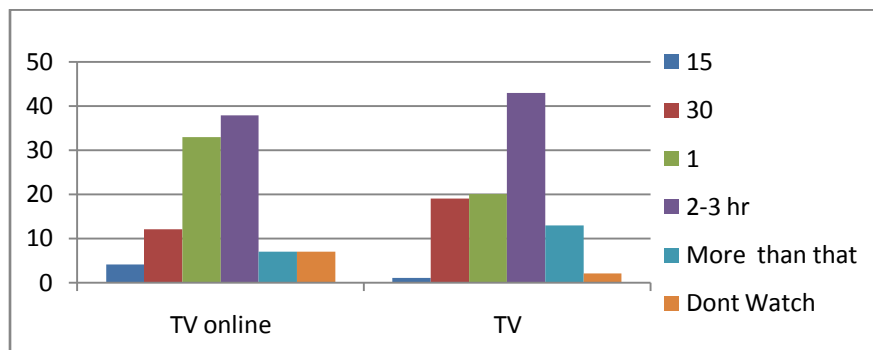
The sample comprises of 100 youngsters in the age group of 18 to 25 who came from four different regions of Oman. They all had computer knowledge and access to internet in college labs, homes and hostels.





**Time spent online and Television**

In a sample of 100 around 30 percent did not have internet at home or on the hostel. They used the internet facility available in the hostels. The respondents who lived on the outskirts or in interior villages did not have an internet connection. The 30 percent respondents who did not have internet access used internet in the colleges. 31 percent of the respondents preferred to watch content online while 67 percent preferred to watch satellite channels on TV sets. This is not surprising with low availability of internet, TV is bound to be the only source. While the whole sample did not have frequent internet availability yet they did spend some amount of time on the internet during college hours. Day time was mostly spent online while night time was dedicated to watching TV. 43 percent viewers spent two to three hours watching satellite channels while 38 percent watched online television. The total 2 to 3 hours spent online is more or less at par with TV. While in the one hour category more viewers spent time online than on traditional television.



**7. Time spent online TV and Traditional TV sets**

This reflects that while television claims viewers for more lengthy periods online TV is preferred for short periods. This implies that short clips or short content is more successful online while long format programming works better for satellite channels. Personal computers and mobile phones are suitable for short programming or what has come to be known as snacking. Snack content is short and usually appeals to the viewers. The language preferences are also an indicator of preferred content.

**Demand for local content**

60 percent preferred to browse in Arabic and 85 percent preferred to watch Arabic channels. This shows that there is a huge demand for local content both online and on TV. Local arabic snack content can be a route to target young audiences.

**Barriers to Internet TV**

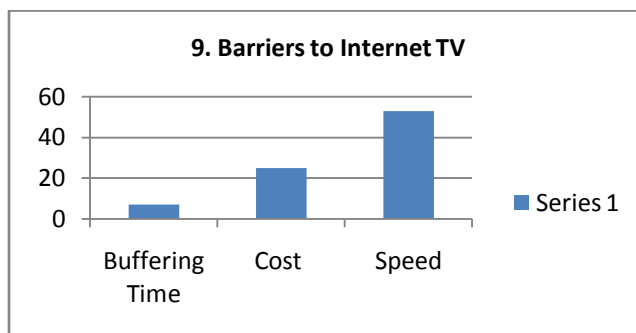
Since only 31 percent of the respondents preferred to watch content online while 67 percent preferred to watch satellite, this raises questions as to what makes the viewership for online content lower than that of satellite TV. During the discussion the respondents pointed out that this is due to the lack of availability, cost and speed of broadband. Amongst the three barriers to internet usage speed was a major concern followed by cost and buffering time.

As compared to this Hayyaks' Mobile pre paid broadband packages are from daily 1 GB package costing 1 OMR to monthly 5 GB package for 19 OMR. Post paid mobile plans range from monthly 1GB plan for 5 OMR to 30 GB for 59 OMR.

**8. Omantel's Post paid Bundles**

	2 mbps Starter	2mbps standard	2mbps unlimited	5Mbps	12 Mbps	24Mbps	40Mbps
Monthly subscription (Rial Omani)	7	12	20	25	35	50	60
Download speed	512Kbps -2 Mbps	512 Kbps-2Mbps	512 Kbps-2Mbps	3Mbps-5Mbps	8Mbps-12Mbps	16Mbps-24Mbps	40 Mbps
Upload speed	128Kbps	128 Kbps	512 Kbps	768 Kbps	1 Mbps	1Mbps	5Mbps
			Unlimited	Unlimited	Unlimited	Unlimited	Unlimited

Omantel's slogan Search It All, Watch it All attracts viewers to the world of broadband. monthly subscriptions ranging from 7 OMR to 60 OMR. The 40 Mbps plan is only available for Fibre to home ( FTTH) coverage. Broadband speeds upto 40 Mbps. 10 OMR installation charges , along with a 55 OMR deposit. The most common subscription are for the 7, 12 , 20, 25 OMR plans. Nawras offers similar competitive bundles starting from 500 MB plans for 3OMR to 100 GB plans for 99 OMR for post paid connections. The respondents felt that the prices should be further reduced for fixed broadband.



There were not only quantitative but also qualitative factors responsible for the preference of traditional TV and online video viewing.

**Preference for TV over Online Video**

Despite traditional TV being time and place bound, viewers preferred television due to the following reasons:

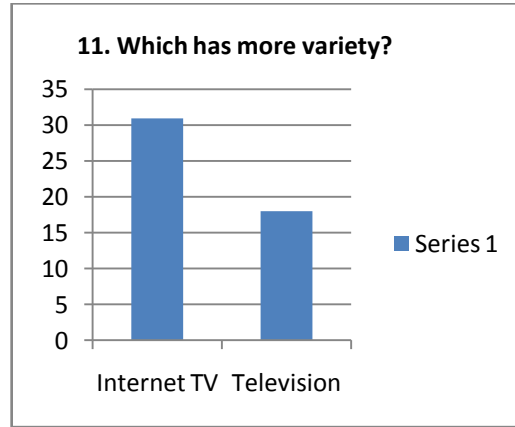
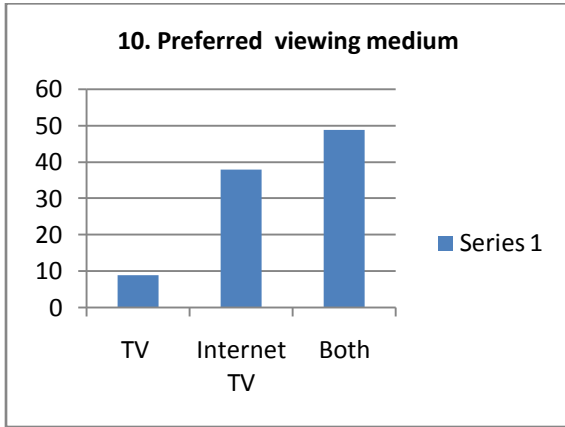
- 1) It does not have any speed or buffering time.
- 2) Does not need any computer knowledge, easy to switch on the button and start watching.
- 3) Picture quality is better
- 4) Allows for communal viewing with family largely preferred amongst Omani society.
- 5) The respondents watched online videos but their faith lay in what was telecast on TV specially news and information as content on television comes from a trusted editorial source. While content on the internet is not monitored specially User Generated.
- 6) Updated current news came first on TV. And was later followed on the internet.

On the other side viewers who preferred Internet TV to traditional TV gave the following reasons :

**Preference of online videos over TV**

- 1) Online videos can be watched anytime anywhere at the viewer's convenience on laptops, tablets or mobile phones.
- 2) Content can be shifted from one domain to another.
- 2) Allows for rewinding, forwarding, stopping & repeating many times
- 3) No advertisements

- 4) Content can be downloaded and uploaded.
- 5) A past event or piece of history unavailable on TV can be found online at any time.
- 6) One may want to watch a programme different from what the family is watching.
- 7) Allows interactivity
- 8) The internet allows users to decide what they want to watch whereas content on TV channels is pre decided.
- 9) Allows personal viewing experience.

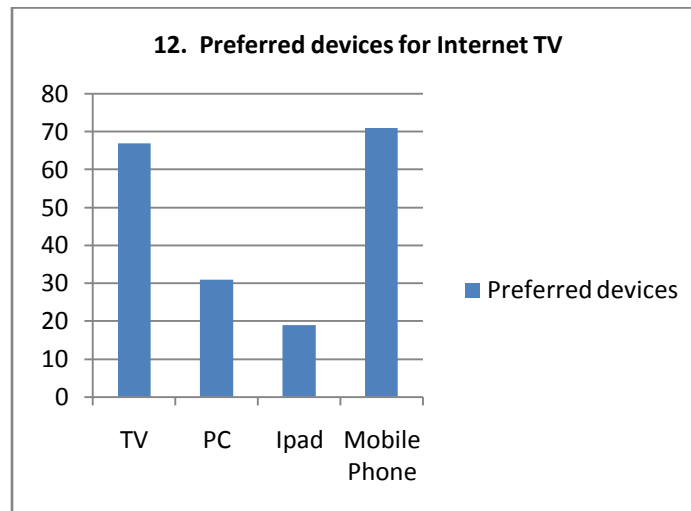


While viewers had valid reasons for their preferences, but overall when asked about which medium they preferred they came out in favour of both mediums. But in terms of variety majority of viewers agreed that online videos provided much more variety than satellite channels. As internet had not only what the TV channels produced but also User Generated Content.

Traditional television has a good number of audiences yet viewers are experiencing advantages of watching online videos the main reasons being flexibility of time and place, and interactivity.

### Screens of Convergence

80 percent of the students own all three devices a personal computer, TV and mobile phone. This reflects that not only is there an appetite for new media technology but they also have the purchasing power to invest in digital devices. But amongst the four devices that provide digital viewing experience broadband on mobile phone was largely preferred.



78 percent of young viewers preferred to watch content on a smart phone. GSM, mobile phones are not being used only for calls, but for browsing the net, watching and downloading videos. Students like the convenience of watching content anywhere at anytime. This trend is reflective of the mobile broadband statistics throughout Oman .



Oman’s mobile penetration has remained high in line with those in the Gulf region and during the year 2011 it further grew to 173.4 per cent from 171 per cent in the previous year. (Al Maha Financial services, Oman Observer, April 2012) . Now we need to determine which websites are the young audiences watching on these portable devices.

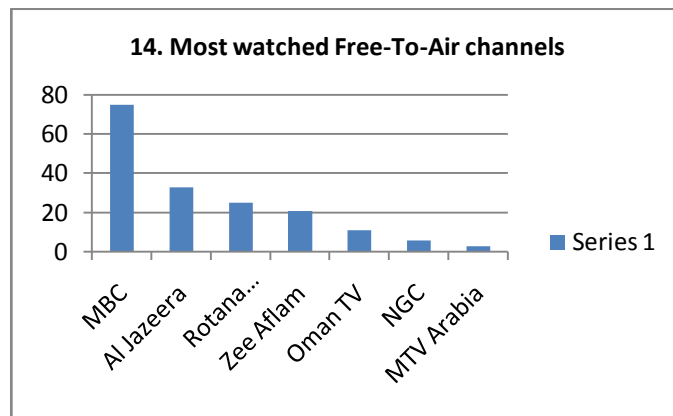
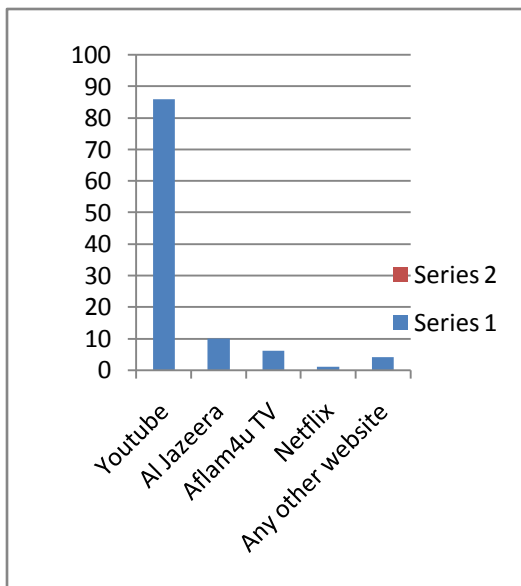
**Most watched online websites**

There is huge collection of free live Internet channels. Today over 2000 free online TV Internet channels are available online. Live free YouTubes can be watched without installing any software or hardware. But this huge variety does not appear in the selected list of the youth's most preferred online tv sites. There is a lack of awareness that they even exist.

**@ YouTube**

While the concept of web TV is still very new to Oman , yet YouTube and Al Jazeera seem to be developing the audience's taste for an online video experience . 86 percent voted for YouTube as a regular site for watching and downloading videos. Perhaps the biggest recent development in Internet television history has been the explosion of YouTube in 2005. Like most Internet giants, the site started as a small project led by three tech-savvy young entrepreneurs. Looking for a better way to find videos of current events shot by individuals all over the world, the founders of YouTube created a forum that quickly filled not only with user-generated content, but also television programs. Even though copyright infringement necessitated that these videos be taken down, YouTube showcased the potential for streaming countless types of programming online, monetizing it through ad revenue. The site is used by young Omani's for news, music, films and information. Netflix while extremely popular worldwide is least visited in Oman as students are not exposed to Netflix .With YouTube's exceptional success TV satellite channels are now reaching viewers via their websites.

**13. Most viewed websites**



**YouTube and Free-To-Air satellite channels**

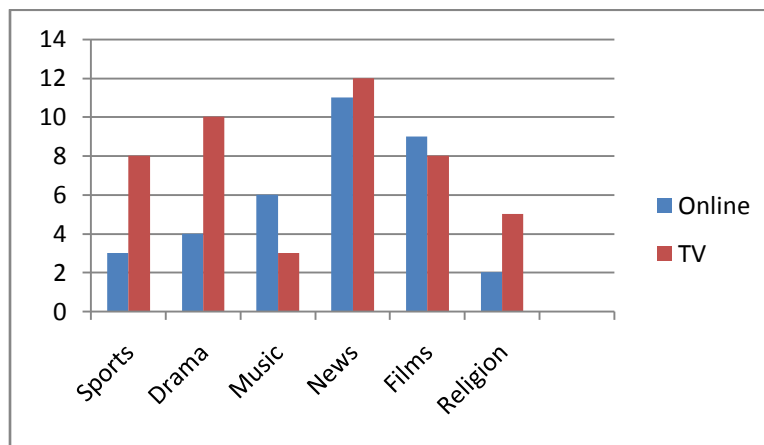
The two bar diagrams 7 and 8 provide a good comparison as they show viewership data for both Al Jazeera and Zee Aflam online and on satellite TV. MBC is the leading free-to-air pan Arab channel followed by Al Jazeera, Rotana channels and Zee Aflam. The television shows like **Arab got talent** and **Good Morning Arab** grabbed highest TRP's amongst the student community. While 35 percent watched Al Jazeera on TV , 10 percent watched it online. While 10 percent watched Zee Aflam on TV sets 8 percent watched it online. This may reflect that online TV has a small audience. Yet this is contradicted by YouTube ratings as some of the content available via channel websites is simultaneously available on YouTube.

If we see satellite viewership figures of Al Jazeera and Zee Aflam on TV sets i.e 75 percent and 33 percent, this is quite low as compared to 86 percent viewers on YouTube. The 86 percent exceeds the viewership of both Al Jazeera and MBC on traditional TV sets. This reflects that viewers are definitely shifting online. The young prefer to watch television and in case they miss the telecast 60 percent watched it online.

**GAP : Genre , Audience and Purpose**

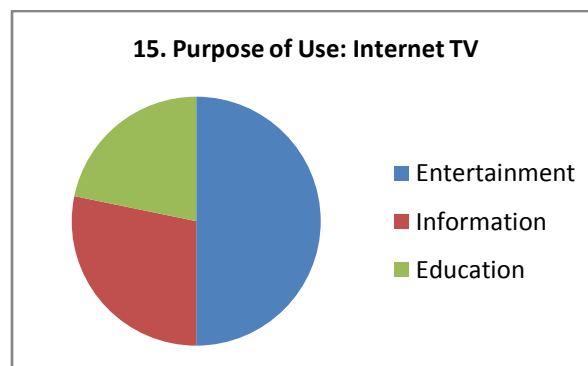
The purpose of internet use is an important criteria to study in order to understand what kind of content is desired from online sites. The figures revealed that online videos were more used for pleasure than instrumental purpose. Since the young viewers are in college 27 percent used it to help them in their studies. Online tutorials are watched to understand concepts or cover up something they had missed in class. 32 percent used it for googling information, while 62 percent used online videos to watch movies, music , sports and short clips. When it comes to entertainment it is also worth noticing that avid TV viewers are turning to the internet to watch their favourite shows online. But what type of information and entertainment are they looking for? And how is this useful to them and what do they do with the information? How does online content differ from content on TV?

**14. Popular genres online and on satellite channels**



Viewers prefer online videos for some genres while television sets for others. In order to understand differences in TV and online viewership the survey included a choice of six different genres. The survey revealed that sports, drama and religion are preferably watched on television sets. While viewers preferred to watch music, films and news online. The reason attributed for this was drama, sports and religion are to be enjoyed with family . While music, films and news were preferably watched alone. Sports is also at times watched alone on Ipads and mobile phone. Films and music are usually not only watched but also downloaded. News could be repeated and so could films and music this makes online viewing of these genres better on the net than on TV sets. Besides news or films are not watched only for oneself but are also shared on social networks .

Viewers generally went online to see what happened on last night's show . They watch videos to share them with others. 60 percent viewers went online if they missed a programme. They liked to watch it again and again , and download their favourite content.



### What is online TV used for

On the whole internet is used for various purposes amongst the student community. 35 percent of the students used it for watching informative videos while 27 percent searched for online video tutorials for education and 62 percent used it for entertainment. Internet can be seen as gaining popularity as a major source of entertainment. The statistics reveals that there is not a complete shift of audiences online. The shift is gradual and slow. The gradual shift reflects that interactive TV is definitely preferred by young audiences yet online videos have to be of good quality. Telecommunication services have scraped a bit of the surface of online territory. Mobile penetration has touched all time high but internet penetration is a challenge. The recent strides being made by the Telecommunication services may pr

### Conclusion

The analysis of the sample shows that internet awareness amongst the youth has surely increased. The study proves that old and new media are being consumed simultaneously by Omani youth. Convergence is visible but due to lack internet penetration it has not reached its optimum level. Omani youth are still deprived of internet availability. With Oman's diverse physical terrain, reaching everywhere is a challenge. Nawras is now helping businesses in rural areas by providing enhanced coverage via the launch of VSAT technology. Internet video popularity is slow but futuristically it is going to create "a social intersection or a networked public where media producer and consumer morph, fuse and splinter as they interact via increasingly collaborative practices". (Henry Jenkins, Convergence Culture).

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