



COMBATING TERRORISM CENTER

at West Point



Down, but Not Out:

An Updated Examination of the Islamic State's Visual Propaganda



Daniel Milton

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The views expressed in this report are the author's and do not necessarily reflect those of the Combating Terrorism Center, United States Military Academy, Department of Defense, or U.S. Government.

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Executive Summary

As the physical territory held by the group known as the Islamic State diminished in 2016-2017, concern about the status of the group's "virtual" caliphate increased. This report focuses on one aspect of that virtual caliphate: the production of visual propaganda by the group's official media bureaus. Using a dataset of more than 13,000 pieces of official visual propaganda distributed from January 2015 to June 2018, this report examines how the production of such pieces has changed over this timeframe in terms of the number of pieces distributed, the geographic dynamics associated with the production of propaganda, and the content featured in these products. Through the course of this examination, several key findings emerge:

Official visual propaganda production has decreased significantly: According to the CTC's collection criteria, August 2015 represented the high-water mark for the production of official visual propaganda, with 754 releases. The low-point occurred in June 2018, with 44 releases. This represents a 94-percent decrease in visual propaganda production. It is important to note that this decrease does not account for non-visual production such as text-only tweets.

Despite the decrease, fluctuation in visual propaganda production is likely to continue: At the macro level, production rebounded slightly in January 2018 before falling off again. This follows a more sustained rebound in production that occurred in late 2016. At the local media bureau level, increases and decreases have occurred quite frequently.

Since July 2015, 100 Islamic State media operatives have been announced as being martyred: Among many reasons for the decrease in propaganda production, one revealed by this report is the number of media personnel who have been killed. In the first quarter of 2016 alone, 20 such personnel were eulogized in the group's propaganda.

Islamic State videos (excluding Amaq and Furat Media Establishment) have been increasing in length since January 2015: In the first five months of 2015, the average length of an Islamic State video was a little over six minutes. In the first five months of 2018, this number had increased to approximately 16 minutes 30 seconds. This may suggest a decreased ability to create narrowly tailored and targeted videos.

The Islamic State's media bureaus inside of Iraq and Syria present a worrying sign for the future: During 2016 and after the liberation of parts of Iraq from formal Islamic State control in December 2017, production of official visual products from Iraqi media bureaus declined. Since that point, however, production coming specifically from Iraq has rebounded slightly, highlighting the group's resilience and potential future threat in the region.

The Islamic State's media bureaus outside of Iraq and Syria are producing more propaganda as a proportion of the group's overall official visual output than ever before: Due to both an overall decline in production of official visual releases inside Iraq and Syria and a small increase among some bureaus outside of Iraq and Syria, most notably the Khurasan bureau, the Islamic State's media bureaus outside of Iraq and Syria have surpassed 20 percent of overall official visual output in six of the last nine months. This level of non-Iraq and Syria production had not occurred once in the preceding 32 months.

The theme of Islamic State official visual releases is overwhelmingly military as opposed to non-military: In the first quarter of 2015, 53 percent of the group's official visual releases were non-military in theme. In this first quarter of 2018, this number had fallen to 15 percent.

Introduction

In October 2016, in an effort to enhance public understanding of the Islamic State's media activities, the Combating Terrorism Center (CTC) at West Point released *Communication Breakdown: Unraveling the Islamic State's Media Efforts*.¹ *Communication Breakdown* provided an analysis of the Islamic State's propaganda based on a dataset of products released between January 2015 and August 2016. Since that report was published, sizable changes have occurred not only on the physical battlefield, but also in regard to the Islamic State's operations in the media sphere. This update to *Communication Breakdown* provides the CTC's most recent data on the official propaganda products released by the Islamic State. The size of the dataset and timeline it covers have now increased to include over 13,000 official visual media products (defined in the methodology section below) released by the Islamic State from January 2015 to June 2018.²

As was the case with *Communication Breakdown*, the purpose of this report is to offer a longer frame view of the Islamic State's official propaganda when it comes to the production of official visual products, such as videos, picture reports, and individually released snapshots. In doing a study of trends over such a long time period, this report sacrifices some level of detail and nuance in favor of a more overarching view of the group's creation of propaganda. Having stated what the report is designed to achieve, it is also important to understand what is beyond the scope of this report. The purpose is not to offer a conclusive assessment of the totality of the group's online operations, which would go beyond the simple production of propaganda to examine a variety of factors such as the consumption of propaganda, the online conversations among members of the group, and efforts to recruit and inspire members and sympathizers to carry out actions on the group's behalf.

As a result, this report is not intended to be a comprehensive treatment of the Islamic State's media activities and only touches briefly on the best way to counter such activities. In the intervening time since *Communication Breakdown* was published, a number of scholars and analysts have published a large amount of research dedicated to explaining, exploring, and understanding the Islamic State's media activities, and have also examined what can be done to undermine the group's messaging in the so-called counter-narrative space.

The report proceeds by first discussing how the methodological approach used in this report has been slightly modified from the approach used in *Communication Breakdown*. The report then moves to a presentation of the macro-level trends found in the updated data, including the aggregate number of products released over the entire span of the dataset. Following this presentation, the data is further broken down for an examination of geographic nuances related to the production of propaganda in Iraq and Syria, but also around the world in locations where Islamic State media operatives operate under the sanction of the Diwan of Media, the Islamic State's central media office. Patterns related to the themes of the releases are then analyzed, after which the report ends with some discussion of the future of the Islamic State's propaganda efforts, as well as of the efforts of the various countries continuing to deal with this challenging problem.

Methodological Notes

1 Daniel Milton, *Communication Breakdown: Unraveling the Islamic State's Media Efforts* (West Point, NY: Combating Terrorism Center, 2016).

2 It may be cumbersome to refer to the data that populates this report as "the Islamic State's official visual media releases" every single time it is mentioned. Thus, from this point forward, the shorthand of "Islamic State media releases," "Islamic State media products," or simply "products" and "releases" should be understood as referring to the description of the data referenced here. Any deviations, in terms of the underlying data being discussed, from this standard will be specifically called out in the report.

The methodological approach for this report is similar to that utilized for *Communication Breakdown*. As was the case with the previous report, the Islamic State's official visual media releases were manually captured and coded by CTC researchers. For purposes of this report, official releases are those released by the Islamic State's central media bureaus (Al-Furqan, Al-Hayat, etc.) or by one of the group's official regional media bureaus.³ Tweets, photos, videos, or any other item created and distributed by "unofficial" media arms or supporters of the Islamic State are not included in the analysis featured in this report. Visual releases are those through which the gist of the message can be understood by a consumer regardless of the language in which they were written, such as videos, picture reports, or individual photos released online. They do not include releases that do not have a visual component to them such as audio only files, text-only tweets, or text-only statements that claim responsibility for a particular operation.

Perhaps the most important impact of this approach to coding official visual releases is that Amaq News Agency was not a formal part of the initial collection of official visual releases beginning in January 2015. Given the fact that the Islamic State has never officially announced that Amaq operates under its auspices, there was some justification for this approach, even though *Communication Breakdown* noted that "[Amaq's] activities have confirmed its official status."⁴ However, forthcoming CTC research makes the ties between Amaq and the Islamic State's central media apparatus even clearer, making the initial exclusion of Amaq media products an unfortunate limitation of this work.⁵ To mitigate the effect of this exclusion, CTC researchers began collecting and coding Amaq videos in September 2016. Where applicable in the subsequent report, the coding of these releases will be discussed in order to offer a more complete picture of the Islamic State's propaganda activities.

Aside from the inclusion of some data on Amaq video releases, the main difference between this work and the previous CTC report has to do with the time range encompassed by the data. Whereas *Communication Breakdown* covered from January 2015 to August 2016, this report has been updated to extend the coverage of the dataset through June 2018. In general, the approach here is descriptive, highlighting trends and developments in the Islamic State's production of visual propaganda since January 2015. In addition to describing these trends, this report offers some discussion of explanations for some of these trends.

However, such discussion is not intended as a deep treatment of the underlying reasons for these trends. This is, in part, because the analysis and report are based on public outputs of the group, not on internal documents and discussions about those outputs. Unfortunately, aside from a small number of captured or leaked documents, there is currently a lack of publicly available primary sources that could provide insight into these patterns.⁶ Nevertheless, the descriptive effort here illuminates patterns and trends that can hopefully, either through future availability of documents or use of more sophisticated data and analytic techniques, set the stage for continued research on the Islamic State's media activities.

Additionally, there is one important difference to note in terms of the presentation of the data in the previous report and the current report. In the previous report, individual photos released by the group were labeled under the "Twitter (Photo)" category. However, it seems more consistent with the Islamic State's current distribution practices to label these items simply as "Individual Photos."

3 As discussed in the subsequent paragraph, this does not include releases published by Amaq News Agency. It also excludes material published by Furat Media Center.

4 Milton, p. 14.

5 This research is based on a number of captured documents that provide much more detail about the Islamic State's media organization than has previously been available.

6 For an example of this type of work in terms of leaked documents, see Aymenn al-Tamimi's very useful archive of internal Islamic State documents. In particular, one of al-Tamimi's piece focused on internal conflict within the Islamic State media organization and is available at <http://jihadology.net/2017/09/28/the-archivist-media-fitna-in-the-islamic-state/>. Captured enemy documents were also a key part of *Communication Breakdown*.

Limitations

As with *Communication Breakdown*, this report is not without its limitations. While every effort has been made to collect all the propaganda material that falls within the definitions used in this report, the possibility exists that some products may have been missed. While the author has no reason to suspect this as a problem, it cannot be fully excluded. However, because this report discusses macro-level trends, any unintentional omissions should not affect the key takeaways offered in this report.

Another limitation is that the production of propaganda is an uncertain proxy in terms of the group's trajectory on the ground. The creation of propaganda is constrained by a variety of factors, including resource availability, personnel, local conditions, and communications challenges. Though the author has tried to appropriately caveat all the conclusions discussed in this report, readers should be cautious in trying to draw too many direct parallels between the information presented here and the actual activity of the Islamic State in the various territories in which it is still active.

A further limitation is that the coding of propaganda does not directly address some of the issues that are of the most intense policy interest, namely on the effects of propaganda and the decline in its production portrayed here. Attacks inspired by the ideology of the Islamic State have continued even in the midst of the territorial setbacks and the decline in the production of propaganda. What is the relationship between the production of propaganda and the recruitment or mobilization of an individual on behalf of the group creating the propaganda? The data here does not answer that question.

Finally, the largest limitation is that this data only touches on the tip of the iceberg when it comes to the Islamic State's online activities. The production of official propaganda is only one aspect of these activities. The Islamic State also recruits, sets up translation teams, and attempts to raise money in the online space. These issues may occur at different rates or in different quantities than those shown in this report. The same limitation can be applied in the case of the group's offline activities. There is no direct consideration here of how the group uses propaganda to maintain the morale of its fighters, speak to local communities using something other than its officially created visual propaganda products, or conduct other forms of outreach such as *Da'wa* (religious outreach and proselytizing).⁷

Despite these limitations, it is the sincere hope of the author that the information and research contained in this report will prove useful to the wide array of scholars, practitioners, policymakers, private corporations, and non-governmental organizations engaged in dealing with the difficult problem of terrorist propaganda.

Trendlines from 30,000 Feet: Overall Statistics of Official Visual Media Releases

In this section of the report, the CTC dataset is broken down into a number of different cuts in order to offer complementary, yet distinct views of the Islamic State's media activities from January 2015 to June 2018. The areas examined include official visual products, the number of media martyrs announced by the Islamic State, and various metrics to examine the issue of the 'quality' of propaganda.

Quantity: Islamic State Propaganda Output

One of the findings in the previous report that received a significant amount of attention was that in August 2016, the number of official Islamic State media releases had dipped to the lowest level since

7 Despite the fact that the local, offline approach to propaganda is not considered here, recent research has begun to examine this question in greater depth. Charlie Winter and Haid Haid, *Jihadist Propaganda, Offline: Strategic Communication in Modern Warfare* (Washington, D.C.: Middle East Institute, 2018).

the data collection began in January 2015.⁸ With this updated data, it is now possible to see if the drop in production first highlighted by a number of analysts and scholars in the summer of 2016 was durable or if it simply represented a bump in the group's propaganda production.

The evidence that the drop in official Islamic State production was durable is quite convincing. Figure 1, which shows the number of products released by the group from January 2015 to June 2018, demonstrates that although the group was able to reverse slightly the decline from the middle of 2016 and into 2017, production has fallen off again since that point. The number of products released in June 2018, a total of 44 official visual media releases, has displaced August 2016 as the lowest month over the more than three-year timespan covered by the dataset. In terms of percentages, the decline from the August 2015 high-water mark to the lowest point in June 2018 represented a 94-percent reduction in the public release of official visual propaganda by the Islamic State.

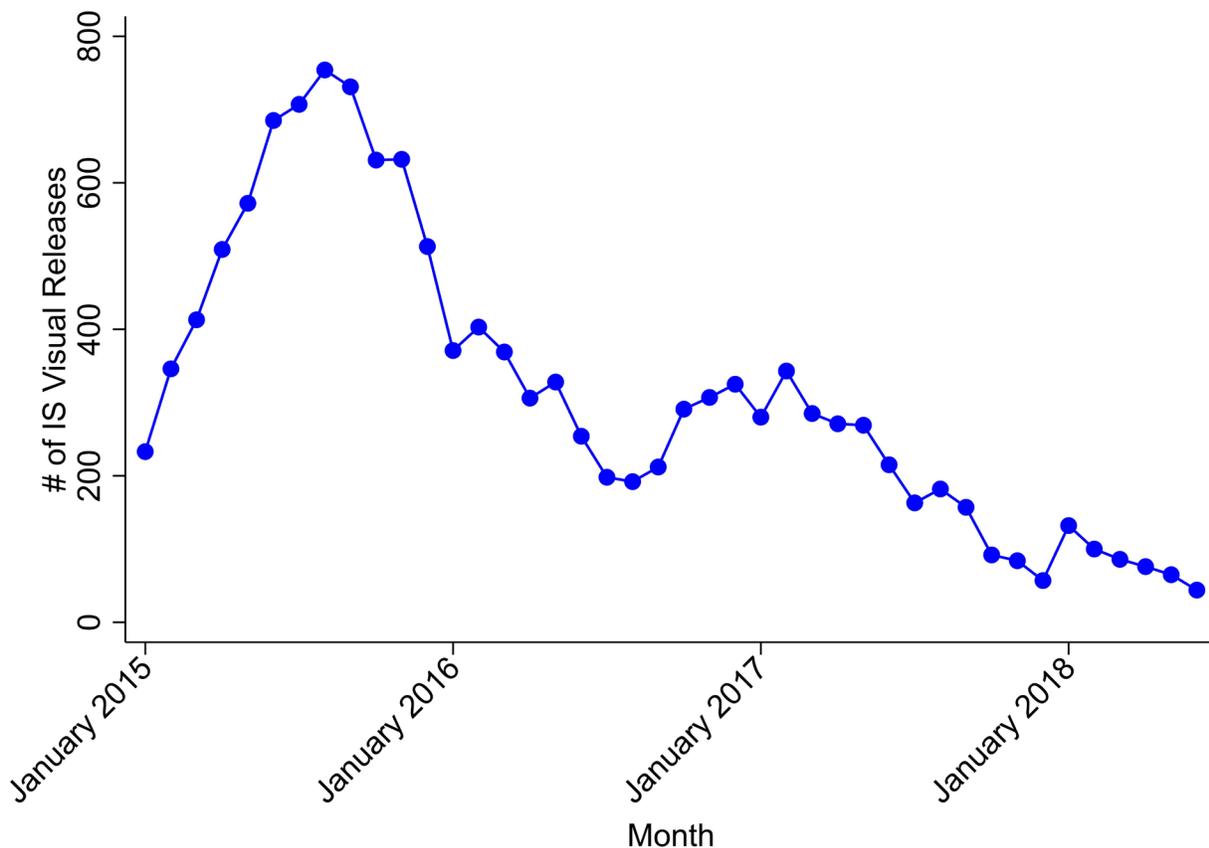


Figure 1: Number of Islamic State Official Visual Media Releases, January 2015 – June 2018

That said, the data also makes clear that the decline experienced has been reversible to some degree. Indeed, after a consistent decline from August 2015 - August 2016, there was a slight, but steady, rise in the number of products released on a monthly basis by the Islamic State over the next few months. This elevated level of production was maintained until February 2017, after which a slow decline begins. The pace of the decline greatly accelerates in June 2017 and has continued through to the time of this writing (July 2018).

One valid critique of this work, as discussed above, is that video releases from Amaq News Agency are not included, thereby creating the possibility that the decline shown in Figure 1 does not accurately

⁸ Scott Shane, "ISIS Media output Drops as Military Pressure Rises, Report Says," *New York Times*, October 10, 2016.

represent the Islamic State's visual propaganda production. While Amaq videos were not collected for the same time period as other official visual releases were, CTC researchers did collect these videos from November 2016 to June 2018. The comparison of Amaq News Agency videos to the rest of the Islamic State's official visual releases appears in Figure 2.

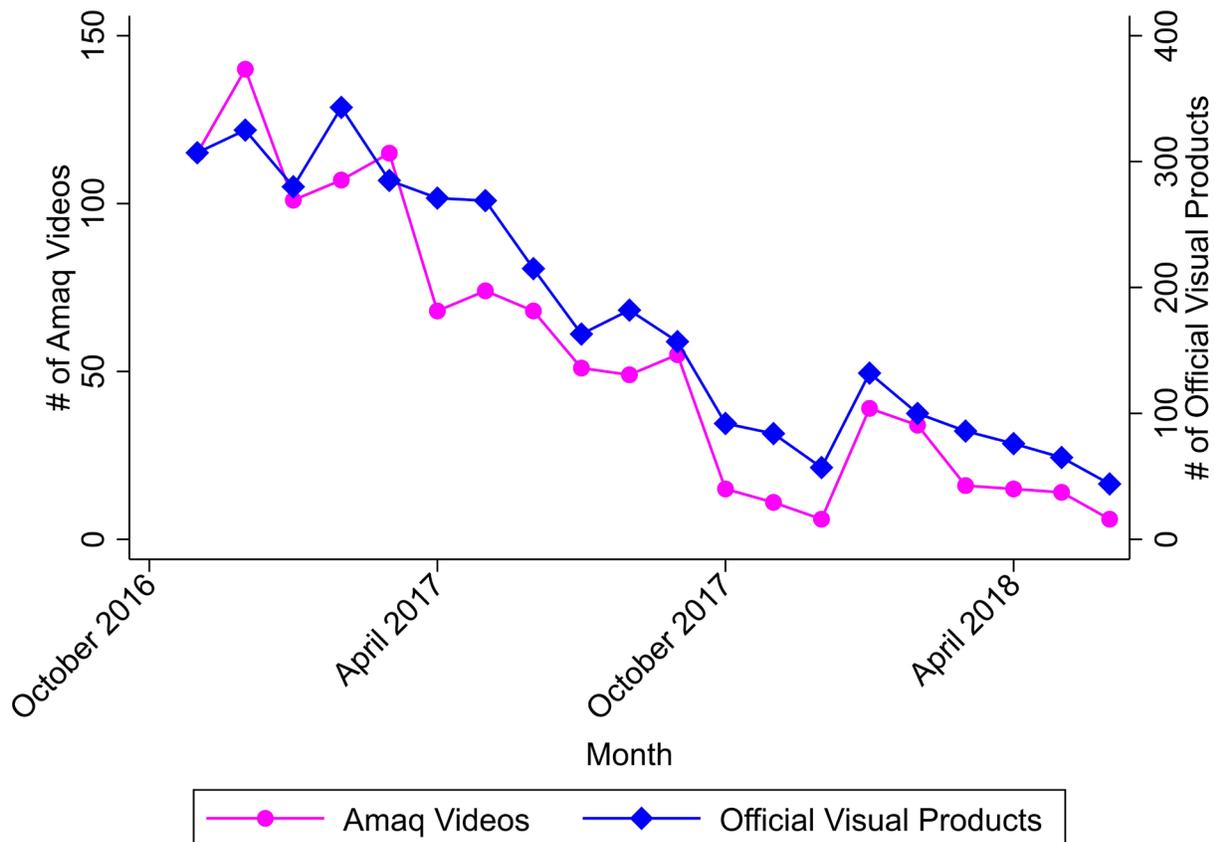


Figure 2: Comparison of Amaq News Agency and Official Visual Releases, November 2016 – June 2018

What this comparison shows is that, at least during the time period covered by the dataset, the release of Amaq videos tracked very closely with the rest of the Islamic State's official visual releases.⁹ Indeed, the statistical correlation between these two components is very high at 0.96. What it suggests is that even though the absolute number of official visual releases would be higher if Amaq videos were included, the inclusion of these videos would not change the trajectory and trends represented in the data.¹⁰ Indeed, though Amaq has continued to push out videos over recent months, it has not been immune to the difficult circumstances facing the rest of the organization.

Media Martyrs: The Impact of Personnel Losses

There is no doubt that a variety of factors are responsible for this decline in official visual production. Indeed, recruitment challenges, the difficulty in traveling to Islamic State-held territory, battlefield

⁹ While Amaq does occasionally release individual photos that highlight a military battle or other activity, the dataset here only captured Amaq's video releases.

¹⁰ To be clear, this assumes that Amaq's production did not change dramatically prior to November 2016. If it did, then the size of the drop from the high-water mark of August 2015 to the low in December 2018 may not be as large as depicted here.

losses for the Islamic State, the continued pressure against the group online by governments and private companies, and the squeeze on the group's finances likely all play a role. There may also have been a strategic decision by the group to produce less propaganda in an effort to draw less attention during its struggles on the physical battlefield. However, another more specific factor merits discussion here. There appears to have been a concerted effort by the anti-Islamic State coalition to identify and target, through kinetic strikes, media operatives of the Islamic State.

One way to see the overall impact of this effort to remove Islamic State media personnel from the organization is by extracting the Islamic State's own announcement of media personnel who have been killed over the same time period. Figure 3 does just that, showing the number of Islamic State media "martyrs" by quarter beginning in the first quarter of 2015.

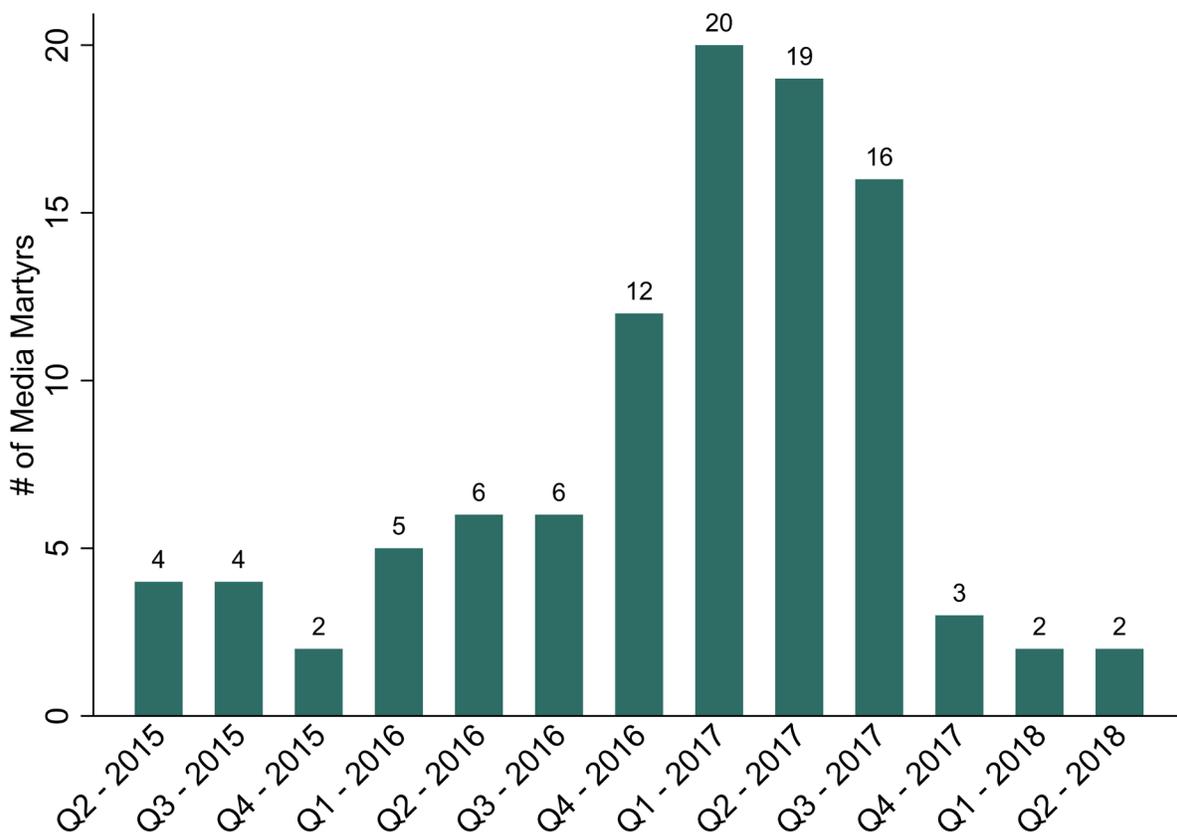


Figure 3: Islamic State Announcement of Media Martyrs, by Quarter

To be clear, the mere mention of a "media martyr" by the Islamic State does not mean that the individual was killed as the direct result of a targeted strike by anti-Islamic State forces. Although media operatives do some of their media work in centralized locations, it is not uncommon for them to be outside of this location during the course of their work.¹¹ Islamic State media operatives are not only responsible for creating and editing propaganda, but also for distributing it to soldiers and civilians through both online and in-person delivery. Theirs is also the job of finding the stories that make up the propaganda of the Islamic State, which requires traveling to different locations or battle lines. And, as suggested by the number of media martyr eulogy images in which the martyr is holding a gun

11 To get a better sense of the variety of tasks for which media operatives are responsible, it can be helpful to examine primary source documents from the Islamic State (and its predecessor organizations) that describe these roles in a large amount of detail. See Milton. See also the forthcoming CTC research report based on a newly released trove of captured documents that highlight the group's media organization.

instead of a camera, media operatives may not be exempt from being called into service as a soldier on the battlefield.

Consequently, it could be that the deceased media operative was simply one of many individuals killed in an airstrike on an Islamic State military or administrative building, died from wounds sustained while filming on the frontlines, or died while fighting in a military action. In short, there is no way in this dataset to distinguish between those who were targeted intentionally as a result of their being part of the Islamic State media establishment and those who died due to some other set of circumstances.

Two points bear noting with regard to the death of Islamic State media operatives. First, if it stands to reason that the removal of media personnel had a negative impact on the organization's ability to produce media (a seemingly uncontroversial proposition), then the evidence provided here that nearly 100 such individuals have been eliminated, regardless of the reason, is significant.

The second observation worth mentioning here is that the targeting of Islamic State media personnel appears to have been an increasing emphasis of the U.S. government from 2016 onward. Indeed, in 2016, international media reported on a concerted effort to carry out strikes against and arrests geared toward the group's media arm, specifically in regard to its English-language capability.¹² More recently, a July 2017 press release by the U.S. Department of Defense highlighted six "senior" Islamic State media officials who had been killed by airstrikes since March of that year.¹³ The increased targeting of the Islamic State's media apparatus was also noted by the group itself. In March 2016, the Amaq News Agency released a video featuring captured British journalist John Cantlie mocking the targeting of the group's media kiosks by U.S. aircraft.¹⁴

It is worth reemphasizing that while this analysis cannot directly connect the struggles of the Islamic State to maintain its same level of media production to the number of media martyrs, the removal of personnel from the media arm of the organization has, at the very least, increased the difficulty with which Islamic State media can be produced and disseminated.

Having discussed the overall decline in the production of official visual Islamic State media releases from January 2015 to June 2018, it would be logical to laud the successful efforts in undermining the group's ability to create and push propaganda. There has certainly been progress on this front as the past year or so has seen an improved effort by governments and private companies alike to combat the Islamic State's propaganda operation. However, there are four important cautionary points that should be considered as one thinks about the implications of these results.

First, as noted in *Communication Breakdown*, despite this dip in output, the Islamic State media apparatus maintains a robust capability to produce content. This capability, even having reached a new low in terms of the absolute number of visual products it has put out, has weathered a number of challenges from airstrikes to the loss of territory to a reduction in the group's overall funding. And, even at its lowest point, the group's official branches were still collectively producing dozens of releases each month, including high-quality videos and photo reports. It is also important to recognize that the number of productions is simply one metric to assess changes in the group's capability over time. The quality of releases, which is more difficult to assess, is addressed in a subsequent section using several proxy metrics.

The second point is equally if not more important, albeit difficult to measure and directly assess. Instead of looking at the drop in production and asking if the anti-Islamic State coalition is winning on

12 Richard Sisk, "Airstrike Kills Senior ISIS Leader Known as 'Dr. Wa'il,'" *Military.com*, September 16, 2016; Adam Goldman and Eric Schmitt, "One by One, ISIS Social Media Experts Are Killed as Result of F.B.I. Program," *New York Times*, November 24, 2016.

13 "Coalition Announces Death of ISIS Leaders," Combined Joint Task Force Operation Inherent Resolve News Release, July 27, 2017.

14 Thomas Joscelyn, "British Hostage Discusses American Airstrikes on Islamic State's Media Kiosks," *FDD's Long War Journal*, March 19, 2016.

the media front, perhaps the question should be, “Does a drop in the number of products being put out by the group actually matter?” This question may seem naïve at first, given that the goal of reducing propaganda output has been the stated objective of coalition efforts, private companies, and special interest organizations. However, this question actually gets to one of the core issues that has not received the attention that it should have, either in the media or in the burgeoning amount of academic research on the subject. This question focuses our attention on the issue of branding.

The Islamic State, since the declaration of its caliphate in June 2014, has built a brand for itself, a point that seems relatively indisputable. Through a combination of military and propaganda successes during the summer of 2014 and the early part of 2015, the group has achieved a level of name recognition that would be coveted by any politician, multinational corporation, or international cause. While the setbacks that it has endured since the summer of 2015 have altered its physical territorial holdings in Iraq and Syria, it is not clear that the overall brand it built for itself has changed very much at all in the mind of potential consumers, even if, as one scholar noted, the thematic tones of its propaganda have shifted to those of an “embattled” caliphate as opposed to those of a “utopian” caliphate.¹⁵

In other words, the issue at this point may not simply be about rolling back the group’s media production. The idea of rolling back the group’s propaganda focuses our attention on a task that might be quite futile. Even if the group’s propaganda production dropped to zero, it has already built a name and niche for itself in the jihadi landscape. The more important issue may be to consider what the appeal of the group actually is and why it continues to attract interest from individuals and groups around the world despite all of its battlefield setbacks.

To think of it another way, the Islamic State’s brand is already out and available for interested consumers. Does that brand require the continual production of several hundred media products every month to maintain its status and stature? There is no clear answer to this question, which depends on what the nature of the group’s goals are (inspired attacks vs. possessing territory), how conditions in the Middle East continue to develop or devolve, and what happens to other contenders for the attention of the jihadi community.

While the continued downward trend of the number of products is laudable and a part of what counter-Islamic State efforts should be doing, the international community needs to dedicate as much (if not more) attention to the underlying issues of motivation, inspiration, and appeal. In short, increased focus needs to be placed on the durability and resilience of the Islamic State’s brand.

The third point is that the Islamic State’s reduced ability to produce visual propaganda releases should not be construed as suggesting that the group’s media organization is not important or no longer a threat. Nor does it mean that other aspects of the group’s online activities, such as its recruitment, motivation, and coordination activities on encrypted platforms like Telegram, have experienced a similar decline. At times, the various components of the jihadis’ online world wax and wane in harmony with each other, but there are also instances where a decline in one may lead to an increase in others. The focus of this report has been on the release of official visual products, and it is not a holistic assessment of the group’s media strategy.

The fourth and final point is that declines can be reversed, something that the Islamic State has shown itself particularly adept at doing. One report noted that the quality and output of the Islamic State of Iraq (ISI) propaganda from 2007-2008 decreased significantly, with the group using old video footage or attacks carried out by other organizations as its own.¹⁶ However, despite the downward trajectory, the media efforts were both resilient and evolving. During the drawdown of U.S. troops from 2008 onward, the group was able to adjust its media strategy to reflect a change from focusing on the

15 Charlie Winter, “Apocalypse, later: a longitudinal study of the Islamic State brand,” *Critical Studies in Media Communication* 35:1 (2018): pp. 103-121.

16 Bill Roggio, “Letters from al Qaeda leaders show Iraqi effort is in disarray,” FDD’s Long War Journal, September 11, 2008.

Americans as occupiers to the Iraqi government as occupiers.¹⁷ Eventually, as events on the ground in Iraq and Syria created opportunities, the group's media efforts began to pay dividends that may have seemed unlikely in 2008. This example of resilience should not be distant from our evaluation of the current environment and its potential prognosis.

The Issue of "Quality"

The CTC data contains additional nuance beyond the aggregate number of monthly media releases produced by the group. Diving into the numbers is critical, because one common question about Islamic State propaganda is whether or not a dip in the frequency of products has come with a dip in the quality of those products. A detailed assessment of quality might include the use of technical means to assess the resolution of the images, content analysis to count the number of mistakes over time in terms of content or editing of the videos, or some other method.

Some of these quality assessments have been discussed anecdotally in articles written about the Islamic State's media, especially over the past year or so, but specific attempts to assess quality systematically using technical means has not occurred.¹⁸ That said, it is worth noting that technical measures may not be the most fruitful if the group values quality over quantity. If that is the case, the organization may simply prefer to cut products it cannot maintain at a certain level of quality as opposed to putting out a product that does not meet with its self-established precedent for quality. This is one argument for why the publication of *Rumiyah*, the group's foreign language magazine, ceased in late 2017.

Because of the large volume of data in the CTC dataset, such a detailed approach is not undertaken here. Instead, the subsequent analysis focuses on changes in the relative number and length of products released by the Islamic State over time. While some argument may be made that these factors might be proxies of quality, they are relatively blunt in nature and should be applied for such a purpose with caution.

To begin, Figure 4 shows the proportion of the Islamic State's official visual propaganda production that was comprised of videos. What can be seen from Figure 4 is that—in terms of the relative contribution of videos to the group's monthly output—while there has been some variance over time, videos have always been a small proportion of what the group produces. The production of videos also appears to have dipped slightly over time.

There also appears to be a distinct downward shift in the proportion of videos produced by the group in late 2016. Since that point in time (with a few exceptions), the production of videos by the Islamic State's official media bureaus tends to be lower than it was from 2015 through most of 2016. While the reason for this shift is not immediately clear, recall that *Amaq* videos are not included in the underlying data used for this figure. It is possible that *Amaq*'s production picked up during this period of time. Additionally, it is important to note that despite the relatively low proportion of videos, they may still exercise a disproportionate amount of influence as compared to products based on still images (such as picture reports), which likely attract fewer views.

17 Myriam Benraad, "Assessing AQL's Resilience After April's Leadership Decapitations," *CTC Sentinel* 3:6 (2010): pp. 4-8.

18 "Some of the newest high-profile videos contain evident editing, montage and post-production mistakes, which were previously very rare." Miron Lakomy, "Cracks in the Online 'Caliphate': How the Islamic State is Losing Ground in the Battle for Cyberspace," *Perspectives on Terrorism* 11:3 (2017): pp. 40-53.

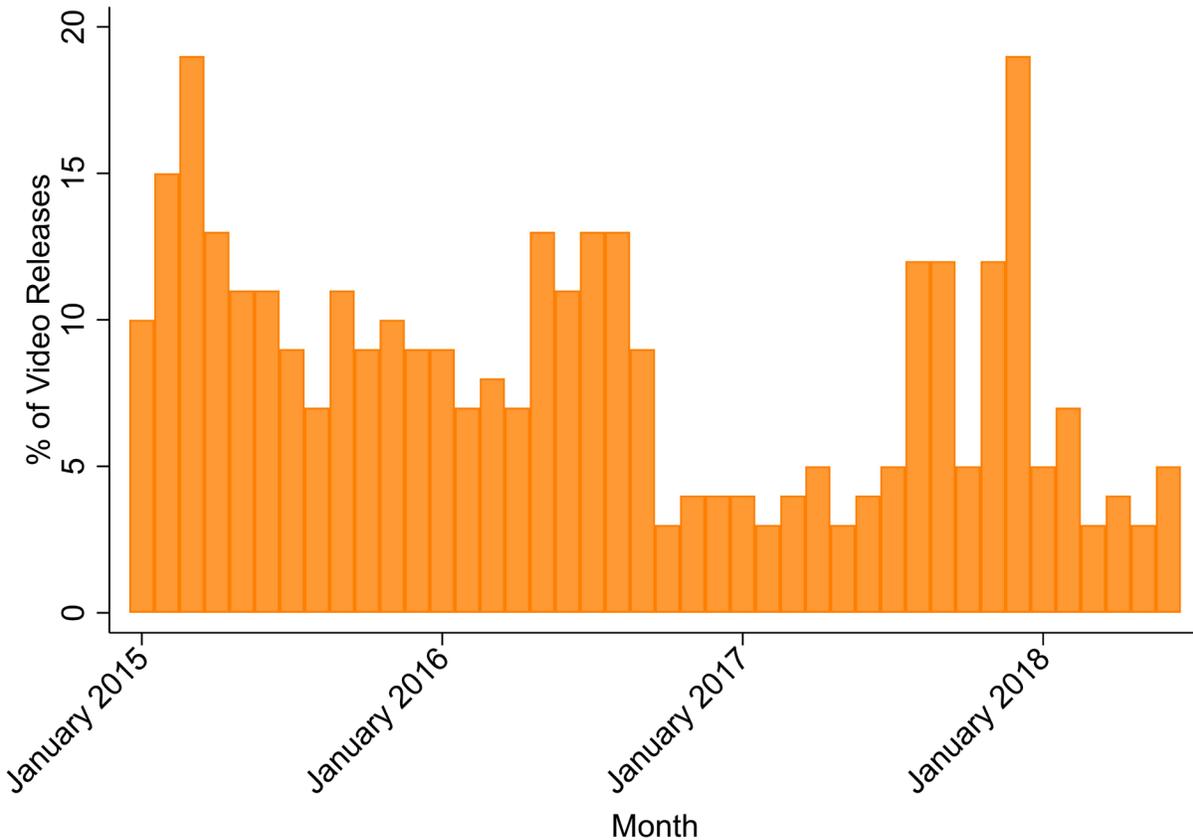


Figure 4: Official Islamic State Videos as Percentage of Total Official Visual Output, January 2015 – June 2018

Moving past a look at strictly the number of products released, there are two ways in which this report assesses the length of Islamic State media products. In the case of picture-based products, either clustered releases of photos on a social-media platform or Telegram, or larger photo essays published on anonymous file-sharing sites, length is measured simply as the number of photos in each release.¹⁹ For the Islamic State’s video products, length is measured in terms of the number of seconds that the video runs. These figures can then be examined over time to see if the length of the media releases changed, which is what is shown in Figure 5.

¹⁹ It is important to note that some of the images in photos, reports, and individual picture releases appear to be still images taken from video footage.

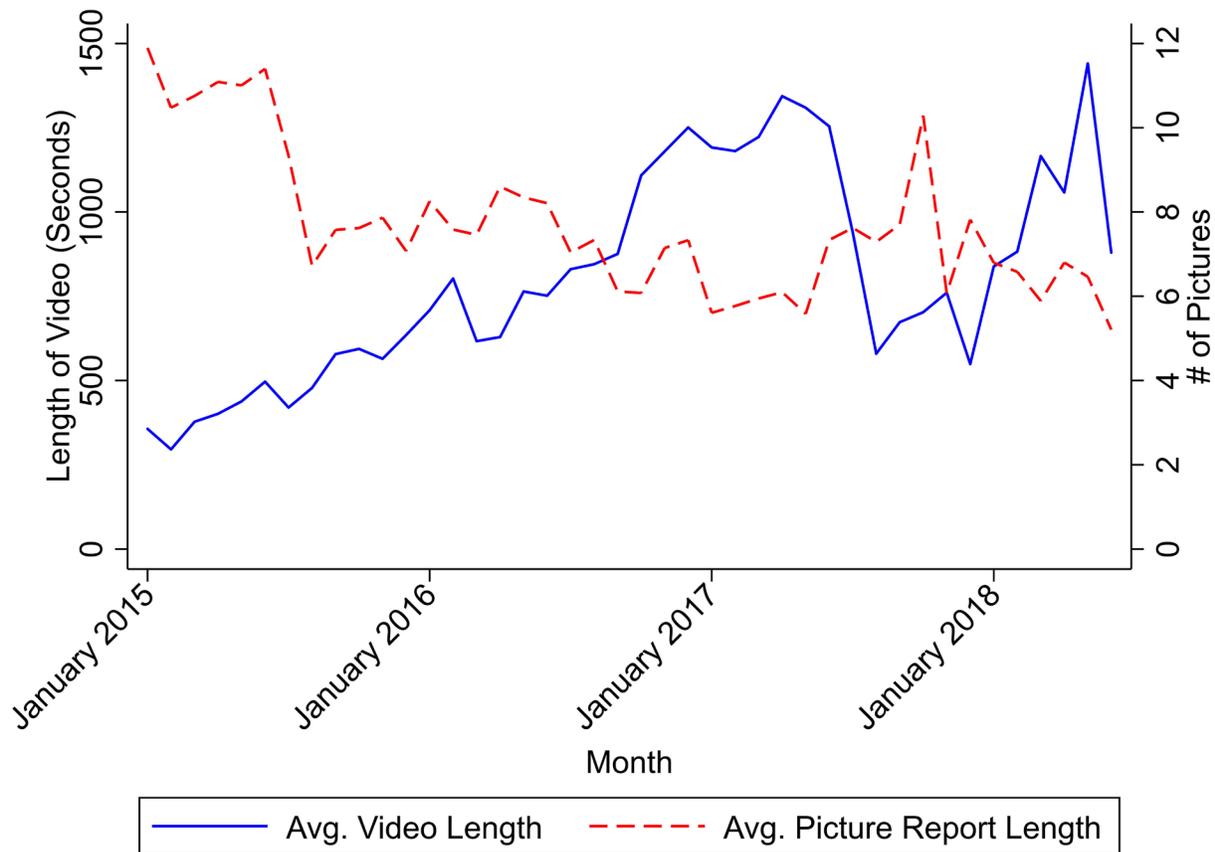


Figure 5: Average Length of Islamic State Media Releases, January 2015 – June 2018

Figure 5 reveals a few interesting patterns related to the length of Islamic State propaganda photo montages and videos over time. First, the group's photo reports have become shorter over time, on average. In January 2015, the average number of images in photo reports that month was almost 12 images. In each subsequent year from 2016 to 2018, this number changed to approximately eight, six, and seven images, respectively.

Second, the length of Islamic State video releases (excluding videos releases by Amaq News Agency) has increased over time. In the first five months of 2015, the average video was about six minutes in length. This number jumped to approximately 16 minutes 30 seconds per video in the first five months of 2018. However, it important to note that the average monthly length of videos in 2018 has been subject to a fair amount of variation. This variability is also related to the fact that the number of videos has, in general, been diminishing over the past year or so. This small number of videos creates the opportunity for longer or shorter videos to exercise strong influence on the monthly average.

If one were inclined to explain these two findings in terms of the group's battlefield losses, it might appear difficult at first glance. Videos, both in terms of equipment and editing, require much more labor than do photo-based product releases. Given that assumption, one result could be that if the group were under pressure, the length of videos would decrease, not increase. Conversely, if the group were faced with constraints on its ability to produce videos, but still wanted to produce products and no longer had the resources to do so, publishing longer photo reports would seem to be an easy fix that might still give the appearance of a capable group.

However, by combining these findings, a clearer picture emerges of what the group appears to be doing in response to the pressure mounted against it. To recap, these figures illustrate the following findings:

The number of Islamic State visual media products produced on a monthly basis, despite a pair of attempts to rebound, has recently fallen to the lowest levels seen over the past three years. From the highest period in August 2015 to the lowest in December 2017, the magnitude of this drop was over 90 percent.

Videos have always fluctuated in terms of how much they contribute to the Islamic State's media portfolio on a monthly basis (anywhere between three and 19 percent), but *the proportion of videos fell to five percent in January 2018 and remained low for five months.*²⁰

Picture reports have been decreasing in length over the past three years. In early 2015, picture reports averaged between 10-12 images per report. In early 2018, this number had fallen to between five and seven images per report.

Despite recent fluctuation, *videos releases have been increasing in length over the past three years.* During the first five months of 2015, the average video was just over six minutes long. During the first five months of 2018, the average video was about 16 minutes 30 seconds long.

One possible interpretation of these findings is that the increased length of the videos suggests that the Islamic State is doing a better job at communicating.²¹ The claim is that increased length means increased content and increased content is good for consumers of jihadi propaganda. There are a number of questionable assumptions underlying such a claim, but for our purposes here, the challenge is that it is difficult to evaluate this claim based on the length of the videos alone, as this says little about whether longer videos are a good proxy for quality videos that attract eyes. One potential piece of evidence that raises questions about this interpretation is that the length of Amaq News Agency videos appears to have actually gotten shorter over time. In the first five months of 2017, Amaq News Agency videos were approximately one minute three seconds in length. In the first five months of 2018, Amaq's videos averaged approximately 38 seconds in length. If longer videos were the group's goal, then it would be odd that such an increase is not consistent across all of its platforms. Of course, it may simply be that these different platforms fill different purposes and should not be compared.

Another possible interpretation of these findings, slightly nuanced from that presented in the preceding paragraph, is that the group appears to be compensating for decreasing capacity in terms of its media production in a number of ways. This seems to be the case most clearly in terms of the videos produced by the group. The smaller number of videos that the Islamic State has published as of late tend to be longer in length. By lengthening its videos, the group could be attempting to extract more value from fewer products. It may be that the Islamic State hopes that fewer longer videos will be seen as the same as a larger number of shorter videos. Such a case is harder to make in the case of picture reports, where the time and labor required to produce longer photo reports minimally increases with each additional picture in the report.

When considered together, these figures and results suggest that the group's production capacity is under significant pressure, although the question presented above regarding what this ultimately means as far as the group's brand and its appeal remains poorly understood.

Geographic Dynamics

Other signs of the effects of the counterterrorism and/or counterinsurgency pressure on the group's media efforts can be seen by viewing the data through a geographic lens. In examining the geographic nuances of the Islamic State's media efforts, this report slices the data in a number of different formats.

20 It is important to remember that this only includes videos published by the group's central and provincial media bureaus. Videos releases by Amaq News Agency are not included in this data.

21 "ISIS: Sunset on the 'decline narrative,'" Online Jihad: Monitoring Jihadist Online Communities, June 1, 2018.

Inside Iraq and Syria Compared With Outside Iraq and Syria

The first way in which this report examines the geographic nature of the data is through a comparison of official visual releases produced by the group’s media bureaus inside Iraq and Syria with those that are outside of Iraq and Syria. Before moving to the analysis, it will be useful to define what is meant by regional or provincial media bureaus for purposes of this report. The Islamic State’s media organization has “central” media bureaus that create and publish products for the organization as a whole. These would include bureaus such as Al-Furqan and Al-Hayat. Though these releases may feature one geographic area of the caliphate from time to time, they are not bound by geography in terms of what they produce and are responsible to the central actors and institutions of the Islamic State.

The regional media bureaus, on the other hand, are media entities that exist within the administrative structure of geographic “provinces” or *wilayat* of the Islamic State. Based on forthcoming research that uses internal documents that outline the process through which the Islamic State publishes its propaganda, it seems likely that the local media offices are, at the very least, responsible for the initial creation of propaganda products based on the activities that occur within their locality, if not further editing and revision based on feedback from the Diwan of Media.²² This analysis in this section focuses on these regional media bureaus, but does so by separating those within Iraq and Syria from those outside of Iraq and Syria. Table 1 shows the 41 media bureaus included in this analysis, with the left-hand side being those in Iraq and Syria.²³ On the right-hand side are the media bureaus located outside of Iraq and Syria.

Table 1: Islamic State Regional Media Bureaus in the CTC dataset, By Country

Inside Iraq/Syria		Outside Iraq/Syria	
Bureau Name	Country	Bureau Name	Country
al-Anbar	Iraq	Khurasan	Afghanistan, India, Pakistan
al-Badiyah	Iraq	Bengal	Bangladesh
al-Fallujah	Iraq	Sinai	Egypt
al-Janub	Iraq	Barqah	Libya
al-Jazirah	Iraq	Fezzan	Libya
Baghdad	Iraq	Tripoli	Libya
Dijlah	Iraq	West Africa	Nigeria
Diyala	Iraq	al-Hijaz	Saudi Arabia
Kirkuk	Iraq	al-Bahrayn	Saudi Arabia
Ninawa	Iraq	Najd	Saudi Arabia
Northern Baghdad	Iraq	Somalia	Somalia
Salah ad Din	Iraq	Caucasus	Various

22 As has been previously noted, this upcoming CTC research report is based on a number of captured documents that speak to a variety of topics related to the Islamic State’s media organization, including the editing and publication process.

23 There are several important points to note about Table 1. First, it includes all the provincial media bureaus that published a visual product (as defined in the methodology section of this report) during the time period of this study. Second, some of these media offices, such as Somali, Bengal, and East Asia, though recognized as official by the group, are not part of formal provinces recognized by the Islamic State. Third, the names of all the provincial bureaus are included, whether or not they were active at the time of this report. For example, al-Jazirah appears to have largely been succeeded by al-Badiyah in September 2017, yet both bureaus still appear in Table 1.

al-Furat	Iraq, Syria	East Asia	Various
al-Barakah	Syria	Aden-Abyan	Yemen
al-Khayr	Syria	al-Bayda'	Yemen
al-Raqqah	Syria	al-Liwa' al-Akhdar	Yemen
al-Sahil	Syria	Hadramawt	Yemen
Aleppo	Syria	Lahij	Yemen
Damascus	Syria	Sanaa	Yemen
Hamah	Syria	Shabwah	Yemen
Homs	Syria		
Idlib	Syria		

The presentation of information regarding the production of the regional media bureaus is represented in two ways. The first is in Figure 6, in which the blue line shows the percentage of the group's provincial media releases that came from provinces outside of Iraq and Syria.²⁴

Shortly after the declaration of the caliphate, as the group attracted pledges from groups all around the world, one of the prominent narratives that it put forward was that the caliphate was "remaining and expanding." And while its regional media bureaus outside of Iraq and Syria do continue to push propaganda products out, the group has not necessarily repeated that phrase as enthusiastically in more recent propaganda.

That may be because, strictly from a propaganda production perspective, the maintenance of a robust production of media releases from outside the Iraq and Syria provinces was quite difficult for the group to maintain for most of the past three years. As can be seen from Figure 6, there are a number of rises and declines in terms of the relative contribution of the provincial media bureaus outside of Iraq and Syria. In the first few months of 2015, the provincial media bureaus outside of Iraq and Syria increased their production relative to the Iraq and Syria media bureaus. This increase did not last long before suffering a slowdown in June 2015. The outlying provinces then increased their contribution and maintained about a nine to 13 percent portion of the portfolio, even as the overall level of releases fell, until September 2016, after which a decline in the relative contribution occurred, bottoming out at around 3.6 percent of the Islamic State's overall visual media production in November 2016. Another rebound, followed by a gradual decline, occurred thereafter.

Then, in August 2017, with the Iraq and Syria portions of the caliphate bearing the military brunt of the counter-Islamic State coalition's efforts, the group's external media provinces began bearing a historically inordinate amount of the group's overall production weight. That has, absent a two-month drop at the beginning of 2018, continued through June 2018.

²⁴ To be clear, this calculation excludes material published by the group's central media offices. Only material that can be tagged to a specific provincial or officially recognized regional media bureau is included.

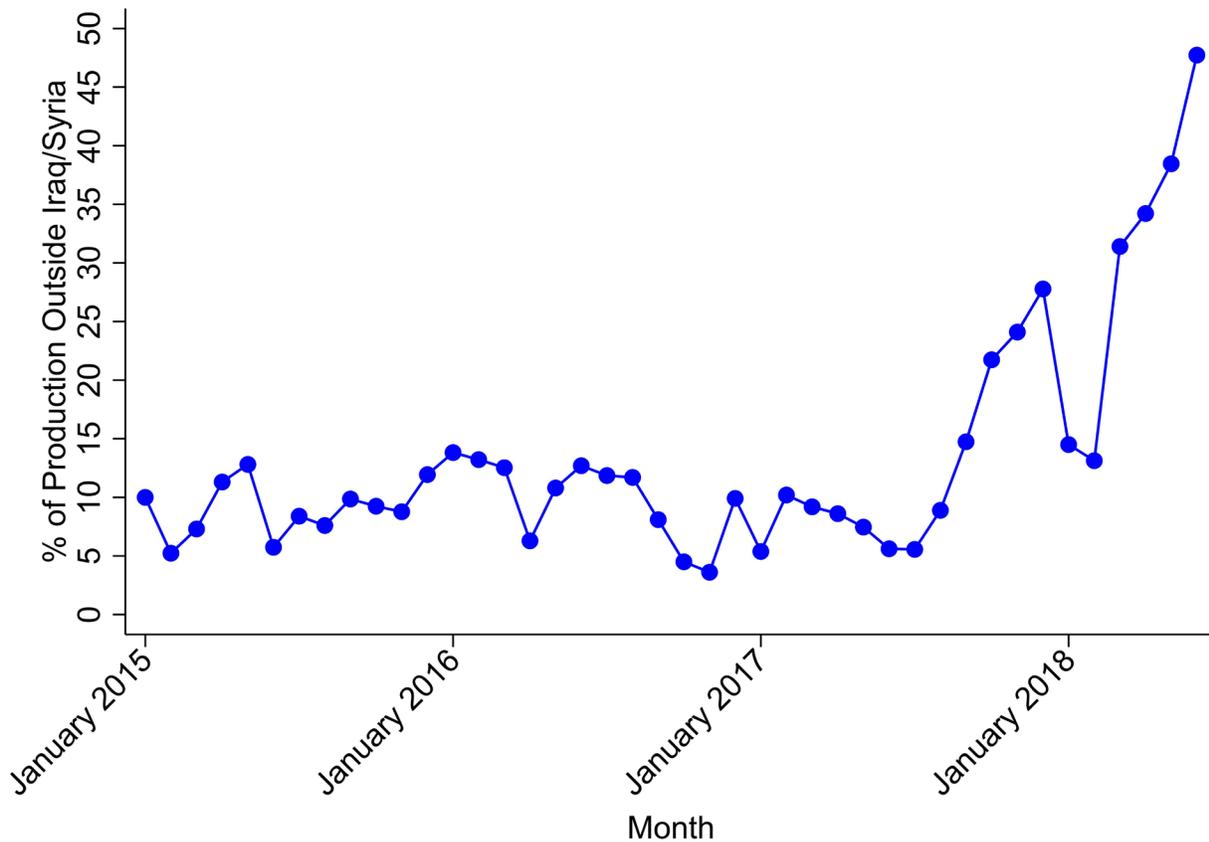


Figure 6: Percentage of Visual Products from Provinces Outside Iraq and Syria, January 2015 – June 2018

Two points are particularly important to understand when considering the increase in propaganda products created outside of Iraq and Syria. First is to recognize that there has been a decline in the group's overall propaganda production. Hence, the rise in the relative production of external bureaus is partially due to the fall in the absolute number of products being produced by bureaus in Iraq and Syria. The second is that the rise in propaganda products is not uniform across all the bureaus outside Iraq and Syria. This is shown in Figure 7, which presents the number of products released by a sampling of six of the Islamic State's media bureaus outside of Iraq and Syria.

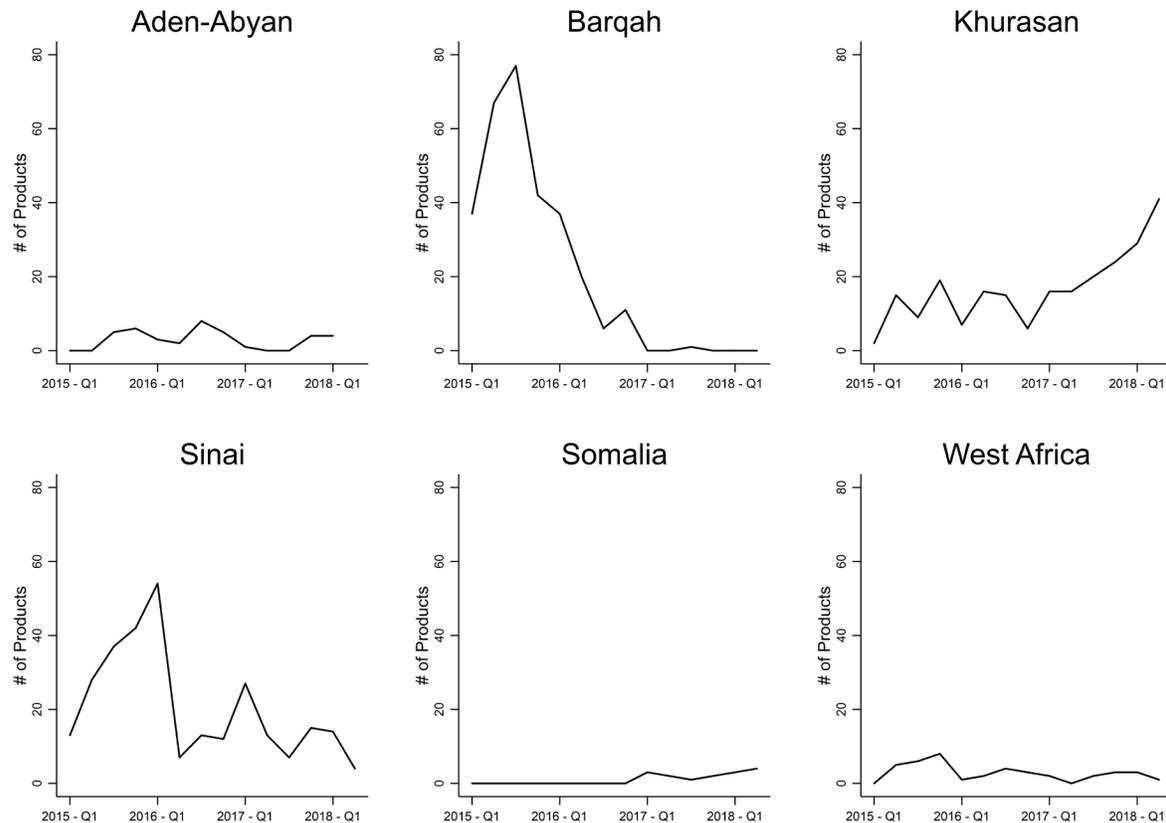


Figure 7: Quarterly Production Levels in Selected Islamic State Provincial Media Bureaus Outside Iraq and Syria, January 2015 – June 2018

As can be seen from Figure 7, there has been a fair amount of variation in production of visual releases by some of the bureaus outside of Iraq and Syria. While the media arms in Somalia, West Africa, and Aden all contributed in small measure to the group's production activities, they have not experienced sharp increases or decreases over the course of the data.

Other bureaus, however, have experienced a decline in propaganda production. One example is the Islamic State media bureau in Barqah (Libya), which includes the flashpoint city of Benghazi. The performance of this bureau generally tracked with the overall decline in propaganda releases shown previously. Additionally, 2016-2017 saw a large amount of fighting between the Islamic State forces in Barqah and opponents, with the Islamic State meeting with several defeats.²⁵ Though not destroyed, the group's propaganda activities appear to have suffered similarly. The decline for the Sinai (Egypt) bureau is also notable, although the reason for the decline is less apparent.

These examples stand in contrast to the Islamic State's Khurasan branch, where the release of visual propaganda has increased in a slow, methodical fashion since early 2015. Indeed, over the past several months, the Khurasan media bureau is largely responsible for the increase in the relative contribution of propaganda by bureaus outside of Iraq and Syria as opposed to those that are inside Iraq and Syria. If the increase in propaganda provides any indication, the Afghanistan-Pakistan region is increasing both its own activities, as well as its importance in the eyes of the broader group. To put it simply, as General John W. Nicholson, Jr., the commander of U.S. military forces in Afghanistan, recently not-

25 "Libyan Islamists Lose Benghazi Districts to Haftar's Forces," BBC News, January 25, 2017; *How the Islamic State Rose, Fell and Could Rise Again in the Maghreb* (Washington, D.C.: International Crisis Group, 2017).

ed, “Islamic State has ambitions.”²⁶ This same sentiment was echoed recently by a State Department official, who noted that “ISIS [in Afghanistan] has grown stronger over the last couple of years.”²⁷

The second point that needs to be emphasized can be seen through a simple comparison of the actual number of pieces produced each month over the three-year timespan. Such a comparison, shown in Figure 8, explains in part why, after August 2017, we see such a large jump in relative contribution of the external media bureaus to the overall Islamic State production efforts. It is because the number of releases from the group’s Iraq and Syria provinces dipped during this time, but also because the group’s provinces in other parts of the world were able to increase and then maintain a consistent production level.

Figure 8 also clearly shows some level of synergy between the Islamic State’s media bureaus. Indeed, the correlation between the number of monthly productions emanating from bureaus in Iraq and Syria and those outside of Iraq and Syria is high ($r = 0.79$). The high level of correlation could be the result of similar military and political conditions in Iraq and Syria as well as around the outlying media bureaus, but another factor likely bears some (if not the majority) of the explanatory weight. It is that the group’s media organization is highly centralized in nature, with a large amount of oversight of the official media activities being exercised by the Diwan of Media, which includes the Media Monitoring Committee.²⁸

The claim that the Islamic State centralizes its media operations is not novel and is highlighted by a number of leaked documents from within the organization, the fact that a number of coordinated releases on a specific topic emerge across several media bureaus from time-to-time, and the near complete stylistic uniformity of releases from the placement of logos to the font used in captions.²⁹ However, this is the first time that such a high level of correlation in overall media production levels has been quantitatively demonstrated, adding more evidence in favor of the conclusion that the group’s centralized control over media activities applies not just to what individuals do, but to what its provincial media bureaus do as well. Whether this continues to be the case as the central media arms continue to suffer losses and setbacks in Iraq and Syria remains to be seen.

26 “Department of Defense Press Briefing by General Nicholson via Teleconference from Kabul, Afghanistan,” U.S. Department of Defense, May 30, 2018.

27 Joel Gehrke, “ISIS getting ‘stronger’ in Afghanistan, says State Department,” *Washington Examiner*, June 30, 2018.

28 This is a finding that is prominently featured in an upcoming CTC report based on captured Islamic State documents.

29 Aymenn al-Tamami’s incredibly useful archive of documents contains several examples of centralized control over media operations: specimens 6W, 11P, 11Q, 28L. In addition to these documents, al-Tamami wrote a blog post showing the efforts of the Islamic State’s central governing arm to resolve disagreements with a provincial media arm. This post is available at <http://jihadology.net/2017/09/28/the-archivist-media-fitna-in-the-islamic-state/>. Charlie Winter also noted the role of the central media office in his translation of an Islamic State media operations document. Charlie Winter, *Media Jihad: The Islamic State’s Doctrine for Information Warfare* (London: International Centre for the Study of Radicalisation, 2017). Finally, a forthcoming CTC report demonstrates this using a number of internal Islamic State documents.

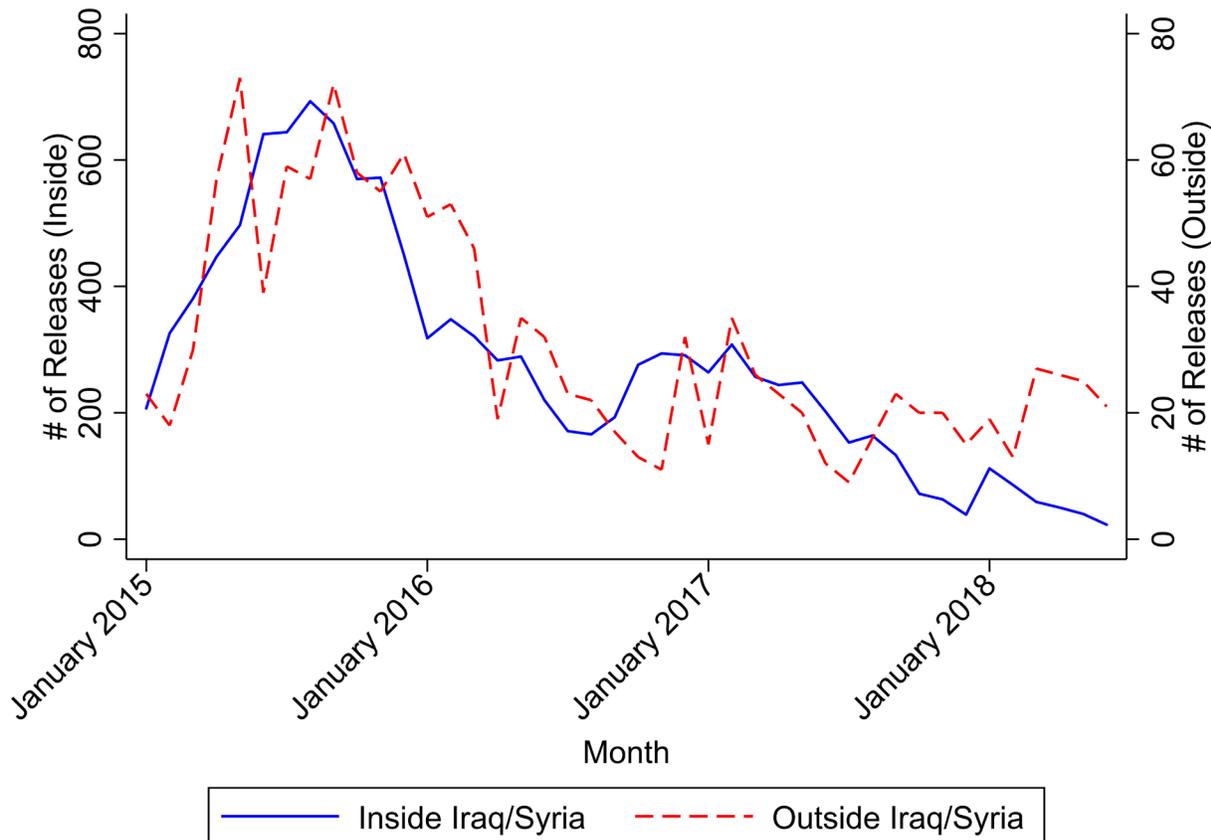


Figure 8: Number of Releases from Iraq and Syria vs. Outside of Iraq and Syria, January 2015 – June 2018

Until this point in this section, the examination of geographic trends in the data has compared production from bureaus inside Iraq and Syria to production from outside Iraq and Syria. While a useful comparison, it is certainly not the only one. Indeed, disaggregating the data further yields additional useful insights.

One of these insights is that, at least as it pertains to the group's media efforts within Iraq and Syrian alone, the Islamic State's propagandist efforts were increasingly reliant on its Syrian bureaus from early 2017 to early 2018, but that recently this trend has reversed itself. Figure 9 demonstrates this by comparing the percentage of releases coming out of the Islamic State's provincial media bureaus in Iraq with those coming out of Syria.³⁰ Of note is the fact that for an almost two-year period of time ending with January 2017, the production balance between Iraq and Syria media bureaus was relatively even and mostly stable. However, this stability began to end in March 2017 as the Syrian media bureaus outpaced the Iraqi media bureaus in terms of products released. This is consistent with the military campaign to defeat the Islamic State, in which Iraq was the primary focus of military efforts from the outset. This effort began to see dividends in 2017 with the Iraqi government's declaration of the liberation of the eastern side of Mosul in January 2017, the entire city of Mosul in July 2017, and the country of Iraq in December 2017.³¹

³⁰ This calculation is done excluding all releases outside of Iraq and Syria, so that the percentage of Iraqi releases combined with the percentage of Syrian releases sums to 1.

³¹ Tamer El-Ghobashy, "Iraqi Military Seizes Control of Eastern Mosul From Islamic State: Prime Minister," *New York Times*, January 24, 2017; Louisa Loveluck, Liz Sly, and Mustafa Salim, "Iraqi forces declare victory over Islamic State in Mosul, but fighting continues," *Washington Post*, July 9, 2017; Margaret Coker and Fahih Hassan, "Iraq Prime Minister Declares Victory Over ISIS," *New York Times*, December 9, 2017.

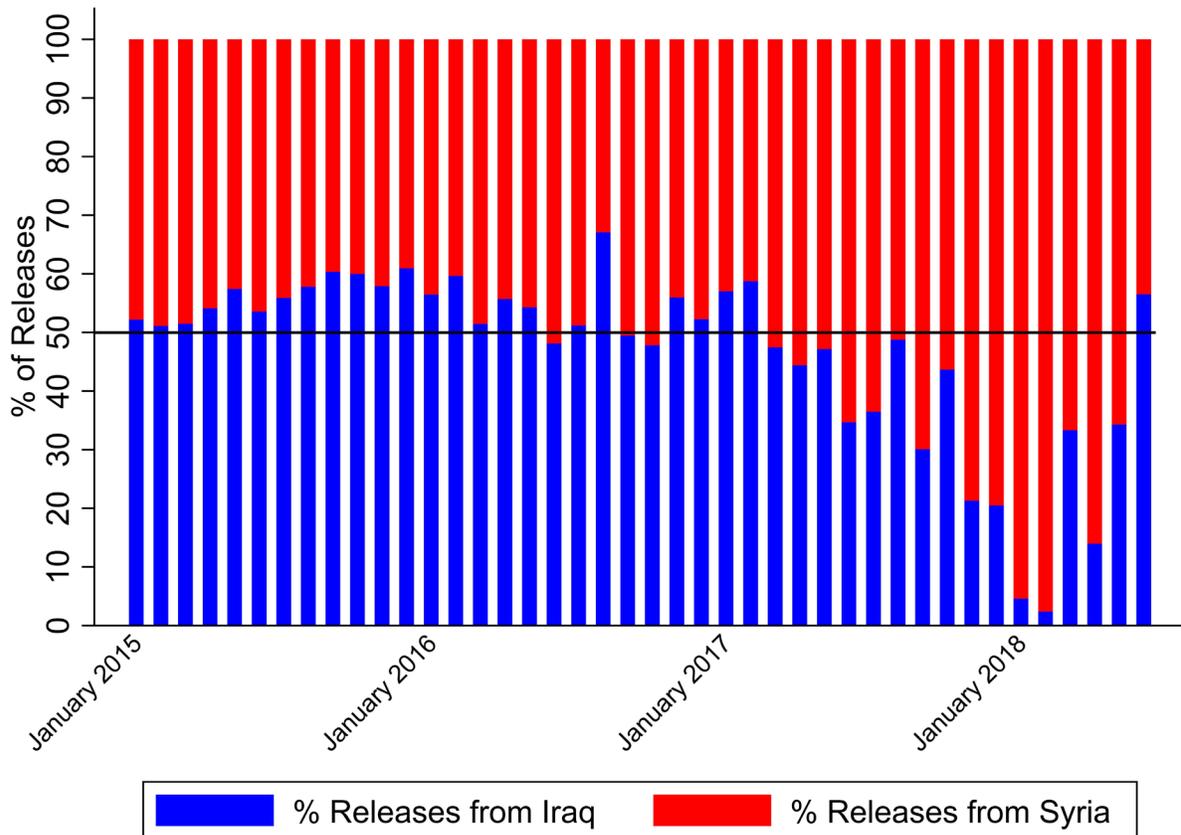


Figure 9: Comparison of Proportion of Visual Releases in Iraq vs. Syria, January 2015 – June 2018

However, from March to June 2018, the generally even balance between production from the Iraqi media bureaus and the Syrian media bureaus appears to have made a rebound, although only additional time will show it to be permanent or temporary. Regardless of whether it is permanent or not, this rebound provides a clear example of how the Islamic State can be resilient and, in some cases, may be recovering to some extent from its setbacks, at least in terms of the production of propaganda. This possibility is strengthened by a number of recent reports from Iraq regarding the presence of sleeper cells and the reemergence of intimidation killings in various parts of Iraq.³²

Two important cautionary notes should be added to this discussion. First, as discussed above, the diminishment of Islamic State media production coming out of Iraq from 2017 and into 2018 does not appear to have been a good barometer for the likelihood or strength of subsequent violence or activities perpetrated by the group.³³ Instead, the decrease in Iraqi-based visual propaganda could have simply been an indication that as the group was removed from overt control of some areas, communication between whatever media personnel remain was reduced (or nonexistent) to the point that the publication of visual propaganda releases was simply not feasible. Another possibility is that the reduced

32 Hassan Hassan, "ISIL sleeper cells in Iraq are a warning sign the extremist group is already reforming," *National*, March 28, 2018; Rikar Hussein, "IS Terror Group Surges in Iraq's Disputed Territories," *Voice of America*, June 26, 2018; "ISIS' Kidnapping of Security Officials Turns into Public Opinion Case in Iraq," *Asharq Al-Awsat*, June 28, 2018. For a very detailed treatment of attack data and areas of Islamic State resurgence, see "June 2018 Islamic State rebuilding in Rural Areas of Central Iraq," available at <http://musingsoniraq.blogspot.com/2018/07/june-2018-islamic-state-rebuilding-in.html>.

33 It is worth noting that despite these formal declarations, the violence in some areas has not been eliminated and has continued as the Islamic State switches into an insurgency. See Daniel Milton and Muhammad al-'Ubaydi, *The Fight Goes On: The Islamic State's Continuing Military Efforts in Liberated Cities* (West Point, NY: Combating Terrorism Center, 2017).

propaganda output was an intentional choice by the group to draw focus away from Iraq to allow its fighters the chance to regroup. Absent more information, it is difficult to adjudicate between these various possibilities.

Second, the reduced nature of the group's media activities in Iraq did not close the door on a future increase or awakening of further media activity from these regions. Even absent the historical lesson of the group's rebound from its low point in 2007-2008, if the Islamic State's media efforts over the past three years have demonstrated anything, it is that they are constantly adapting as conditions on the ground evolve. The past few months seem to provide evidence of that as well.

As much has been made in this section about the decline in the production of visual releases from media bureaus inside Iraq and Syria, the final examination of the geographic trends relating to Islamic State media publications comes by disaggregating the data further into individual media bureaus in Iraq and Syria. This is done in Figure 10, which takes the top nine Islamic State provincial media bureaus (in terms of overall number of products in the dataset) and shows the number of releases on a quarterly basis from the first quarter of 2015 to the first quarter of 2018.

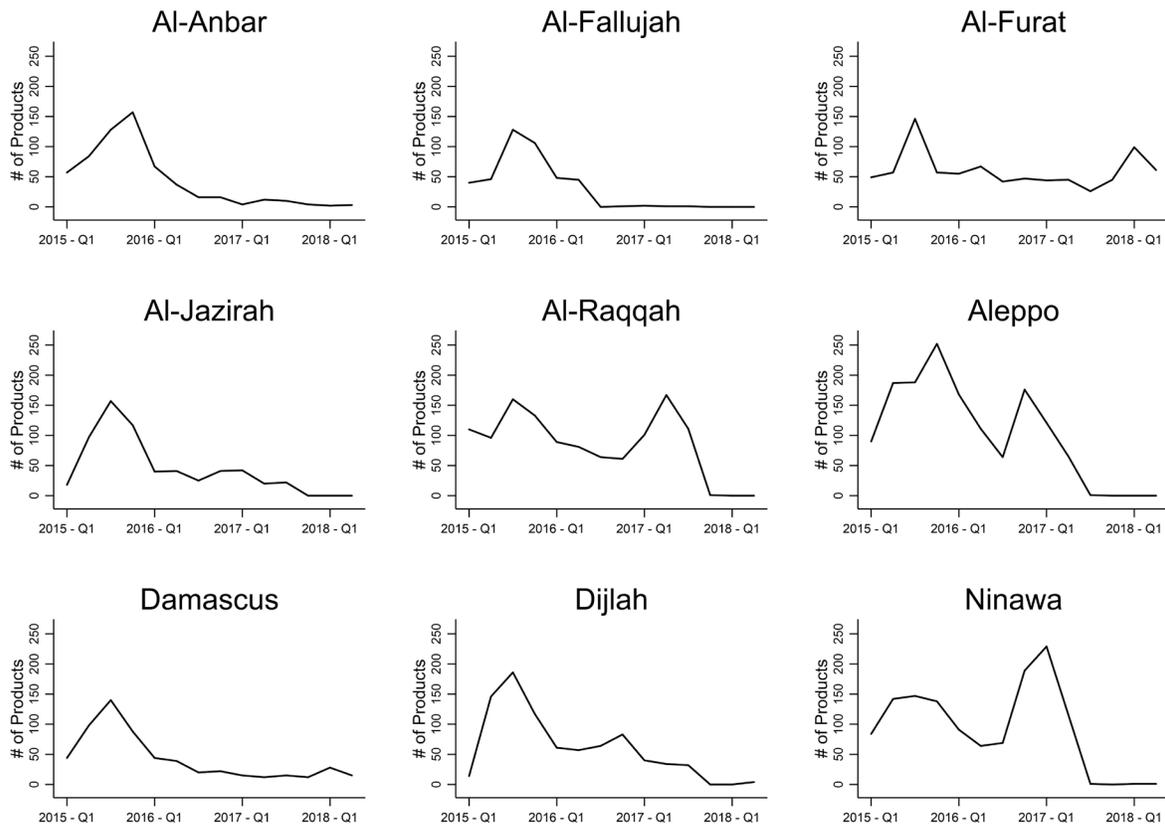


Figure 10: Production Levels in Selected Islamic State Provincial Media Bureaus, January 2015 – June 2018

While production levels in most of the bureaus follow the overall trends already discussed above, there is still a pair of interesting observations that come from Figure 10. First, it is clear that there is such a thing as a “battlefield bump” when it comes to the production of propaganda. This is most notable in the Al-Anbar, Aleppo, Ninawa, and Al-Raqqah media bureaus, whose peaks track very closely with major military operations. Second, once the decline in production has occurred, in some areas it appears to be largely permanent. For example, the Al-Fallujah media bureau, which was one of the higher-producing bureaus in 2015, has produced almost no visual content since the liberation of the

city of Fallujah in the latter part of June 2016.³⁴ This seemingly irreversible decline did not occur in Al-Raqqah, Aleppo, and Ninawa, in which production rebounded after the bureau initially experienced a decline in production. This reversal of propaganda fortune, however, seems to be related to the above-mentioned “battlefield bump” phenomenon and seems unlikely (although not impossible) to reverse itself in the current environment to the same production levels seen previously.

That said, it is important to see that there are indications in Figure 10 of a certain level of resilience and willingness to rebound. The Al-Furat and Damascus media bureaus both experienced slight upticks in the number of products released in the first part of 2018, a testament to the ability and the willingness of the group to continue its media work as conditions continue to evolve.

Observations Related to Content

The final section in this report deals with the actual content of the official visual releases disseminated by the Islamic State. The discussion of content in this report revolves around the coding of the theme of official visual releases. In *Communication Breakdown*, CTC researchers coded releases into a number of categories depending on the primary theme of the release: military, governance, commercial, religious, lifestyle, and other. For simplicity in this section of the report, and in contrast to *Communication Breakdown*, releases are divided into only two categories: military and non-military.

The military category contained images or videos in which Islamic State fighters engaged in combat, trained on specific weapons, patrolled frontline areas, or executed enemies of the group for fighting against the Islamic State. The non-military category contained products where the primary theme was non-military in nature, including but not limited to products that highlighted the distribution of food and money, maintenance of public infrastructure such as roads and electricity, classrooms and other educational settings, Friday prayers, the aftermath of airstrikes, and the distribution of Islamic State propaganda materials to locals. Using these two categories, a number of findings emerge.

In *Communication Breakdown*, one of the major findings was that the Islamic State’s non-military themed propaganda made up a decreasing portion of the group’s products as 2016 wore on. This finding was important because it showed that the caliphate’s state-building project, which it touted in all its propaganda and recruitment pitches, was either not a priority at best or floundering at worst from a propaganda perspective. It is important to remember that groups use propaganda to create a world where their organization looks the best it possibly can to its various target audiences, and the Islamic State was unable to do so as time progressed.

The update shows that this trend has continued and even accelerated since October 2016. Indeed, the relative balance between military and non-military propaganda has tilted very much in favor of military products, to the detriment of its ability to show other aspects of the caliphate. This is clear from Figure 11, which divides the group’s content into two categories based on the overarching theme of the product: military or non-military.³⁵ Each of the pie charts in Figure 11 represents this division during the first quarter of each of the years for which the CTC dataset has data, which ranges from 2015 to 2018.

34 “Abadi visits ‘liberated’ Fallujah, vows to take Mosul,” Al Jazeera, June 26, 2016.

35 Although this distinction seems theoretically easy to make, in practice it can be difficult. Fortunately, in part due to centralized direction discussed in an upcoming CTC report using captured documents from the Islamic State’s media organization, most Islamic State products have one main theme or idea. In the cases where multiple themes emerged, coders were asked to identify the primary theme. If there did not seem to be a primary theme between the military and non-military divide, the product was not used in this portion of the analysis.

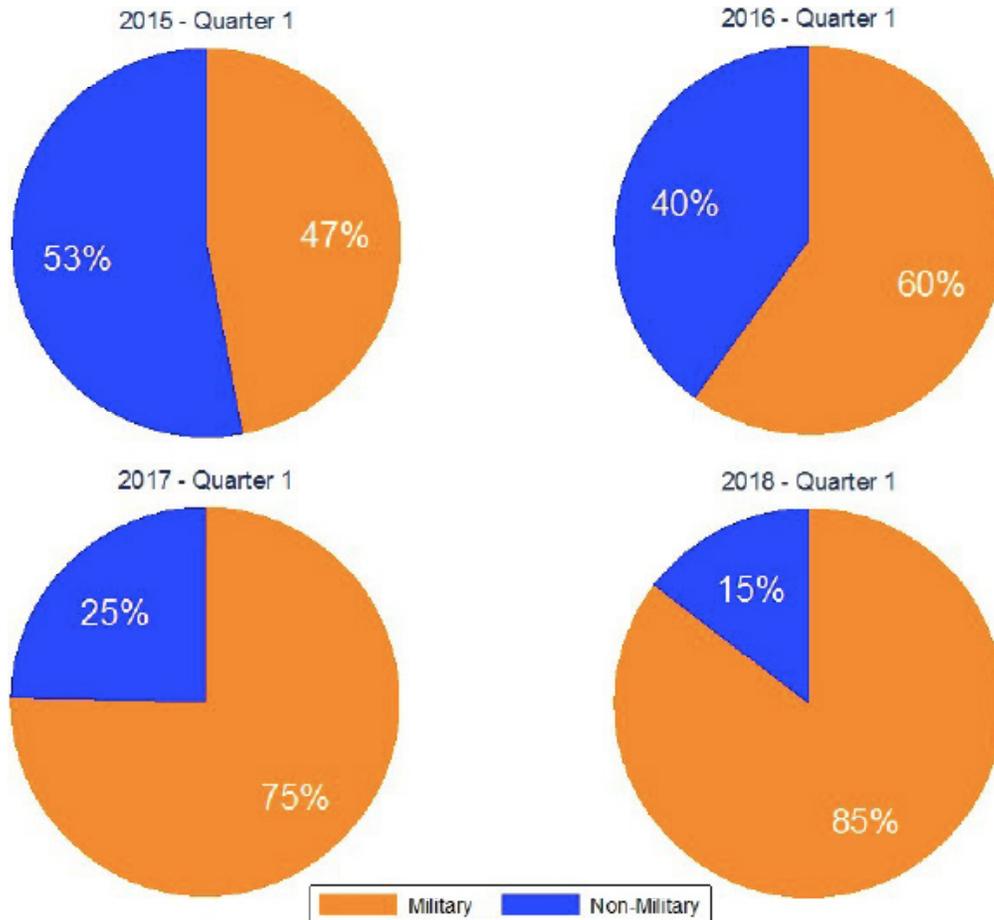


Figure 11: Thematic Change in Islamic State Official Releases (2015 - 2018)

As Figure 11 demonstrates, the Islamic State has struggled to portray itself as a functioning state. By the first quarter of 2018, a mere 15 percent of its releases dealt with anything other than its military activities. There are two important points to make with regard to this content shift. First, 15 percent should be viewed as a rough estimate of the overall tenor of the group's total propaganda output.

For one, it is not clear that the lack of propaganda related to non-military activities such as governance should be taken as a sign that governance is not happening. To be clear, that is not the contention being made here. The group still engages in governance activities, and it is impossible to say how representative its propaganda actually is of its overall activities. However, it is important to note that the Islamic State, as evidenced by its name, distinguished itself from other groups in its determined pursuit of the state-building side of the caliphate project in the here and now. Propaganda allows a group to put the best face, the biased face it wants, toward the world. If the Islamic State has been unable or unwilling to portray its non-military activities in the midst of a declining number of products overall, that is telling indeed.

Another reason it is rough is because, as noted above, this study only includes content that is visual in nature, such as videos and pictures. It does not include text-only propaganda products released as image files by the group. These statements tend to be heavily military in nature, such as statements of military operations. Although these statements were not a part of this study, CTC researchers did collect a small portion of them for purposes of comparison. In the first quarter of 2018, a total of 144

text-only statements were released as image files by the group's provincial media bureaus.³⁶ Every one of these statements was a report on one of the group's military operations.

As discussed above, this study also does not include videos produced by Amaq News Agency, which produces content that is predominantly military in nature. For example, of the more than 1,100 Amaq videos released since November 2016, almost 70 percent focused on military-themed activities and issues. The remaining 30 percent were mostly videos highlighting the aftermath of airstrikes and shelling on civilian populations. There are very few Amaq video releases that focus on issues of governance, religious practices, or commercial activities. When examining the first quarter of 2018 alone, this percentage rises to 81. Thus, although the inclusion of Amaq videos would slightly raise the percentage of non-military releases, such a rise would likely be offset by including the text-only official statements.

Second, it is important to recognize that this inability to portray a substantial amount of governance-related visual releases has come at a time when the overall number of releases has decreased. In other words, not only has the Islamic State's overall production of visual releases decreased, but non-military themed releases have also decreased as well. Coupled with the military losses faced by the group on its terrain in Iraq and Syria, the lack of non-military content may present an image to consumers that the caliphate project itself has suffered a sizable setback.

However, it is worth noting that although the inability of the Islamic State to portray the success and endurance of its caliphate project in real time is a blow to the group, it is neither a mortal wound to the group's ability to resurge in offering such services nor a signal that the underlying demand for entities that can offer governance no longer exists. Indeed, several news articles and reports have shown the group's dedication to its state-building efforts.³⁷

It is important to remember that the group's propaganda on the non-military front was not exclusively an attempt by the group to create a market for its approach to governance. Rather, it was in part a response to the recognition that there was already existing demand on the part of the people in these disenfranchised areas for someone to compete in the marketplace of state-building, as well as for potential supporters around the world who watched the suffering of people due to poor or outright abusive governance. Such demand exists to this day both on the ground and in the hearts and minds of many around the world. This is likely to be the case for the foreseeable future.

Aside from a shift in the overall proportion of military and non-military releases produced by the group, another topic worth examining is whether or not this content shift has any geographic undertones to it. One of the questions frequently raised about the future of the Islamic State has to do with what will happen to the group and its caliphate project in the face of sustained setbacks in Iraq and Syria. One of the suggested possibilities is that the group will relocate itself to another area to begin its caliphate project anew.³⁸ If this were the case, one potential sign that might be found through the group's propaganda would be a shift in the number of non-military releases from inside to outside the caliphate. One could argue that if the provinces outside Iraq and Syria begin to bear more of the burden of the group's non-military propaganda, it might be that the group sees those places as key to the next attempt at its state-building project.

To examine this, Figure 12 focuses only on the non-military releases in the dataset. The blue line

36 To be clear, these 144 statements are only statements that were released as image files (both the blue non-breaking news and the red breaking news releases) and do not include lines of text published by the group on Telegram. These lines of text tend to be one- or two-line updates about military operations. Had they been included, the underlying point being made in this part of the report would have likely remained unchanged.

37 Rukmini Callimachi, "The ISIS Files: When Terrorists Run City Hall," *New York Times*, April 4, 2018; Aymenn Jawad Al-Tamimi, "The Internal Structure of the Islamic State's Hisba Apparatus," Middle East Center for Reporting and Analysis, June 1, 2018.

38 One scholar provided an in-depth examination of how the Islamic State's establishment of a new area might play out in two general stages: partial territorial control and full territorial control. Aaron Y. Zelin, *The Islamic State's Territorial Methodology* (Washington, D.C.: Washington Institute for Near East Policy, 2016).

represents the percentage of visual releases with a non-military theme that emerged from one of the Islamic State's provincial media bureaus outside of Iraq and Syria as opposed to within. Hence, when the blue line begins January 2015 at 10 percent, it means that 10 percent of the group's non-military releases that month came from outside of Iraq and Syria.

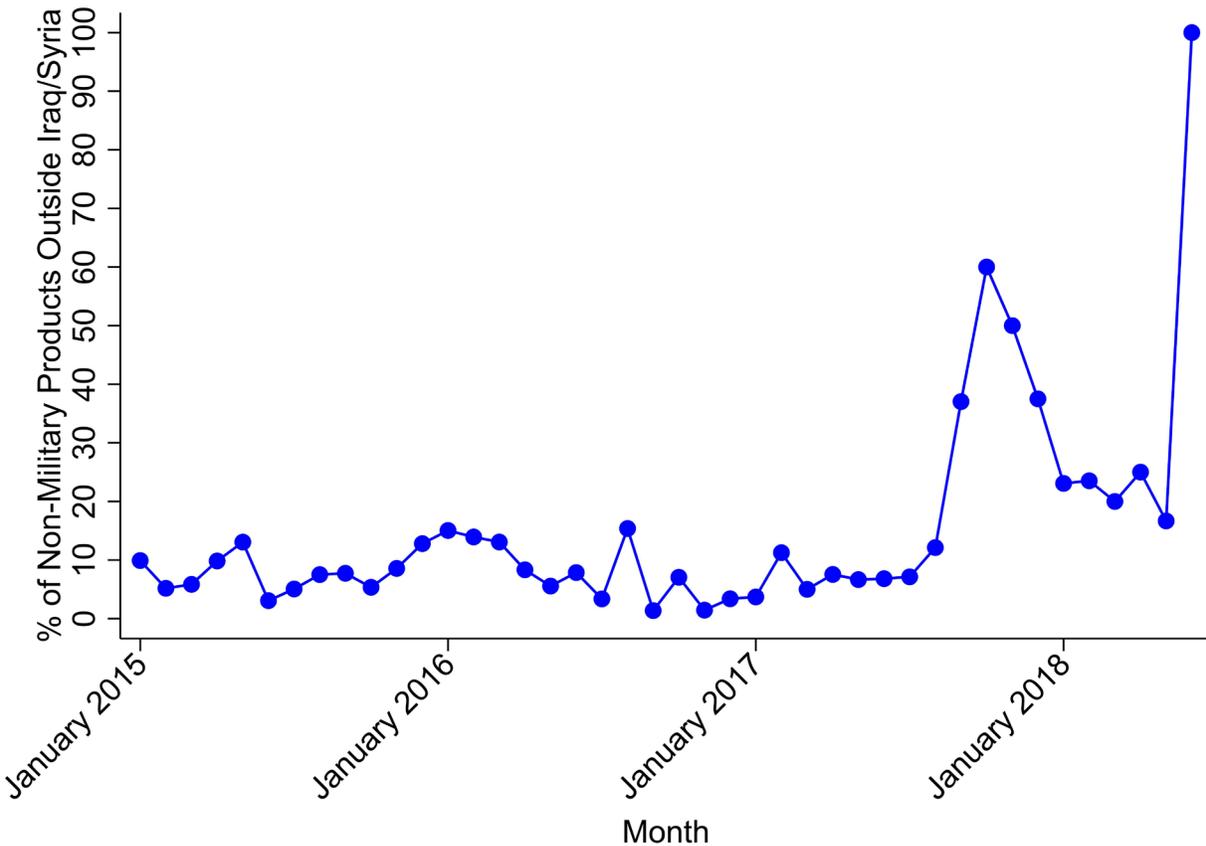


Figure 12: Percentage of Non-Military Releases Inside Iraq and Syria vs. Outside, January 2015 - June 2018

Figure 12 shows that over a large portion of the group's efforts from 2015 until the summer of 2017, the Islamic State's outlying media bureaus have been in the minority as far as their contribution to the group's non-military image goes. It has only been recently, as the group's territorial holdings in Iraq and Syria have been under the most stringent pressures, that the external media bureaus have made a higher proportion of the group's non-military presentation. Though this number at one point approached 70 percent late in 2017, it has settled back down to around 20 percent at the beginning of 2018, which is still higher than it has been for most of the time period under examination in this dataset. June 2018 is an exception to this, although it is an outlier because only one official visual product released that month was not military in nature. The rest of the months in the dataset all had at least eight such products.

What, if anything, can be concluded from Figure 12? While one should be cautious about making inferences regarding an organization's broader trajectory from its propaganda alone, what the group says and from where that message emanates can provide some insight into how the organization and its regional branches see their current status, and also their future opportunities. In this case, it seems that the increased proportion of non-military releases from outside of Iraq and Syria provides some support for the idea that the caliphate project is not dead, but may be taking on more global flavor than it had previously. Of course, because this assessment is based on the group's propaganda, such a

result has to be interpreted cautiously. It may simply be the case that the propaganda does not reflect reality, even if the group wishes that it did.

Regardless of the fact that an increasing proportion of non-military releases is coming from outside of Iraq and Syria, it should remain clear that this is possible in large measure because of the group's territorial setbacks in Iraq and Syria, which have reduced the group's opportunities to showcase its governance efforts in that region. The Islamic State, as noted by many analysts and scholars, is changing and adapting to the setbacks that it has faced. Continued vigilance regarding the group's military and media efforts is as important now as it was at any point during the past several years.

Conclusion

If there were one overarching takeaway from the preceding analysis, it would be that there has been an undeniable decrease in overall propaganda production of the Islamic State, especially in its Iraq and Syria media bureaus. The group has not only lost physical territory, but has also seen its propaganda machine produce fewer products than at any time during the past three years, has lost a number of its media personnel in airstrikes and arrests, and has failed to portray its namesake image—that of a functioning state.

When it comes to the production of content, the number of products and the breadth of locations that produce visual releases continue to ebb and flow as developments occur both in the real and virtual worlds. Regardless of the amount of decline, there is a need to maintain pressure on the Islamic State's media organization and to diversify the approaches taken to limit the group's efforts to both produce and distribute propaganda.

However, such an ebb and flow does not change the fact that as far as the production of official visual releases is concerned, the Islamic State has, categorically speaking, been unable to maintain the level of production that it reached during the summer of 2015. The combination of battlefield losses of personnel and territory together with increased efforts by governments and private companies to limit the group's ability to publish material with complete impunity have taken a toll. The Islamic State's production of official propaganda has taken a significant hit.

Despite what some may perceive to be good news, two critical points need to be emphasized regarding the overall fight against the Islamic State's online efforts. First, governments, researchers, and the public need to recognize that the production of official propaganda has, for as long as the group has existed, only been one component of its overall information operations strategy. Offline propaganda dissemination, one-on-one recruitment, small-group discussions, and the production of videos, statements, and other products by a larger cadre of sympathetic supporters continue. These activities, always important, have only become more so in light of the overall diminishment of the group's official propaganda releases. Additionally, as difficult as the efforts to limit the group's production and dissemination of official propaganda products may appear to have been, efforts against these other elements of the group's overall effort pose even more difficult challenges.

Second, realistic assessments of progress and expectations for ultimate goals, which are lacking in many policy discussions, are critical in the fight against online propaganda. There are those who would take the findings in this report and argue that the decrease in official propaganda production is simply another sign that the Islamic State has been or is on the road to defeat. Similarly, there will be those who look at this report and hasten to call attention to all that the group is still doing in the propaganda space, suggesting that the group has not been defeated in this arena.

Both positions suffer from the same tendency, which is to measure all positive and negative evidence in the information fight (both of which are contained in this report) against the unachievable standard of defeat. As one scholar has noted with regard to the phenomenon of terrorism in general, "making

defeat the ultimate counterterrorism objective is counterproductive and arguably naïve.³⁹ Nobody should be under the illusion that the image painted here is one of a defeated group or even of a dismantled propaganda operation. Nor should the evidence of the decline of the Islamic State's official propaganda output presented in this and many other analyses be counted for naught. It is possible for the group's propaganda efforts to be both damaged and resilient at the same time.

In sum, this decrease does not signal the end of the group's ability to produce propaganda nor is it an indicator of the current status of the group's other online activities. Indeed, the Islamic State's media organization has shown a remarkable amount of resilience in spite of tremendous pressure. The group has rebounded before and has already shown some small signs of doing so again. What is more, the group's broader network of online supporters remains vibrant and active, as shown by recent research. Given this fact, it would be foolhardy to expect that a complete destruction of its presence online is achievable.

In the end, regardless of whether the fortunes of the Islamic State rise or fall, the need to understand propaganda and develop continually refined approaches to counter it will remain a persistent feature of warfare against terrorist organizations for the foreseeable future. In particular, there are three areas where this report has raised additional questions that are likely fruitful areas for ongoing discussion and future research. First, as discussed earlier on in this report, particular attention needs to be given to the questions related to the durability of the group's brand and whether or not the decline in output of official visual releases has impacted the brand. One possibility is that a decline in output may serve as a leading indicator of a decline in brand, but how long will it be before such a decline occurs? If the Islamic State brand is diminishing, how has this impacted the group's messaging?

Second, there are a number of questions related to intergroup competition that are raised in this report. The Islamic State's primary competitor in the global jihadi landscape is al-Qa`ida. As the Islamic State's propaganda presence in Iraq and Syria has changed, has al-Qa`ida responded with an increase in its propaganda presence? What is the nature of al-Qa`ida's messaging in the areas where the Islamic State had seen such setbacks? Broadening the focus of our research beyond the Islamic State will likely pay dividends as these groups and the political environment in which they operate continue to change.

Finally, this report has suggested that Islamic State affiliates outside of Iraq and Syria may play an increasingly prominent role in the group's effort to remain resilient and perpetuate its brand. How does the type of propaganda employed in these areas differ from what we have seen in Iraq and Syria? Will new approaches in terms of the creation and distribution of propaganda be needed in these locales? If so, how do the efforts of both the government and private companies need to change in order to address these potential differences?

39 Bryan C. Price, "Terrorism as Cancer: How to Combat an Incurable Disease," *Terrorism and Political Violence* (2017).

