

Social Media in the Middle East: The Story of 2014



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About the Author

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He is an Honorary Research Fellow and PhD scholar at the Cardiff School of Journalism, Media and Cultural Studies, the UK’s oldest journalism school; and a Fellow of the Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA).

Over the past twenty years Damian has worked – and written - for some of the world’s largest media brands including the BBC, CBS Interactive (ZDNet), the Guardian newspaper and The Huffington Post.

Between 2012-14 he ran the Internet and Society (Rassed) research programme at Qatar’s Ministry of Information and Communications Technology (ictQATAR). Other previous employers include Ofcom (the UK Communications Regulator) and the BBC.

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Ever since the start of the Arab Spring in 2011, there has been considerable interest in the role that social media plays in the Middle East, and how this enabling technology can act as a tool for discourse and information sharing. Although the role of social media as an agent for cultural and political change in the region is probably overstated, there is no doubt that this remains a vibrant and fast moving environment.

This report captures some of the key regional developments in this arena during 2014. It looks at major platforms and social media behaviours, pulling together insights from a wide variety of research and media. In doing this, it builds on previous annual round-ups for [2012](#) and [2013](#), as well as the [quarterly market summaries](#) produced by my old team at the [Rassed](#) research programme at Qatar’s Ministry of Information and Communications Technology (ictQATAR). *[Disclaimer, I led this initiative until mid-December ’14.]*

Although the Middle East and North Africa (MENA) is a large and diverse region, many countries enjoy high levels of social media penetration, often at considerably higher levels than the global average.ⁱ This is particularly true in a number of countries where smartphone take-up is often more advanced.ⁱⁱ

Please note that in this report I have deliberately overlooked issues such as ISIS and the role of social media in that dynamic, as this story is well covered elsewhere (and by people much more qualified to do so). However, even without this dimension, there remain plenty of interesting digital developments to cover from the past year. As a result, I hope you will find this annual round-up as interesting and useful as I do.

Damian Radcliffe, January 2015

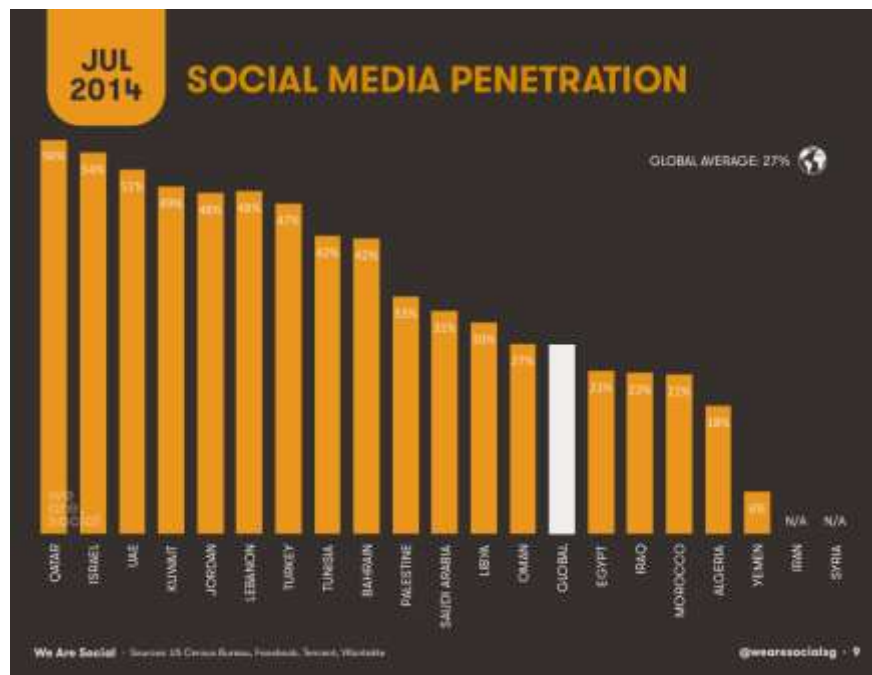


Figure 1: Social Media penetration in MENA, via We Are Social

1. Facebook

- Facebook remains the most popular social network in the region, with 74 million users.**ⁱⁱⁱ It has nearly twice as many internet users as Twitter, its nearest rival, according to a study by Northwestern University in Qatar and the Doha Film Institute.^{iv}
- 42 million MENA users visit Facebook each day, 65% via mobile devices.**^v Given this, **Facebook mobile ads now constitute 66% of total ad revenues in the region (Q3 14).** Up 49% from last year.
- Egypt continues to dominate MENA’s Facebook market.** It is home to c.20 million+ users, with 2.6 million alone joining in Jan-May 2014. **Nonetheless, penetration by country is higher in the less populous Gulf countries,** where a greater percentage of the total population use the network.

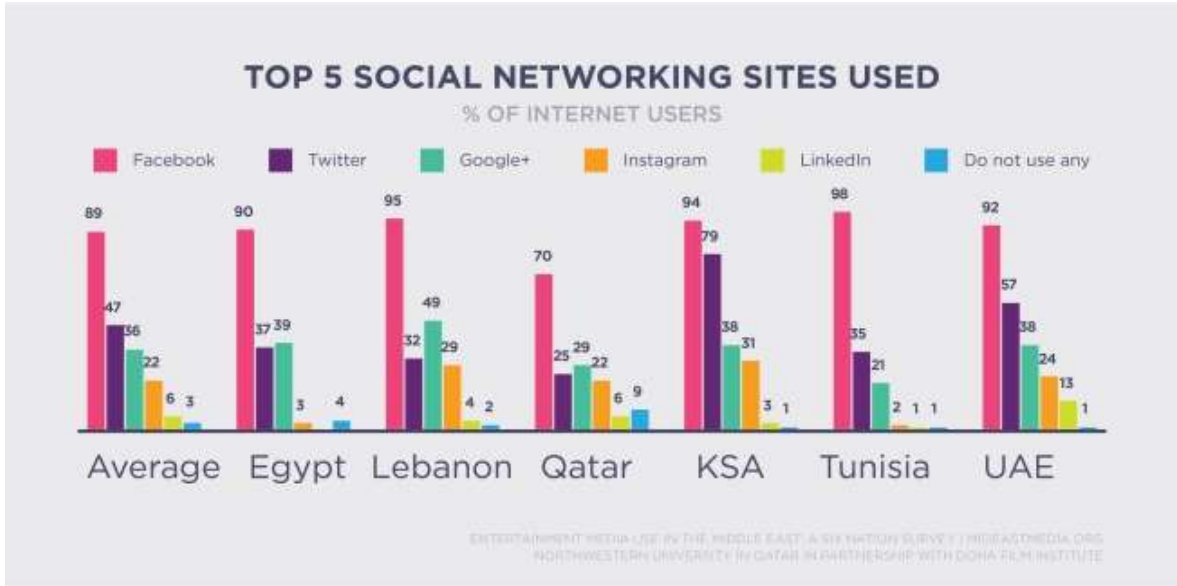


Figure 2: Top social media networks in six select countries^{vi}

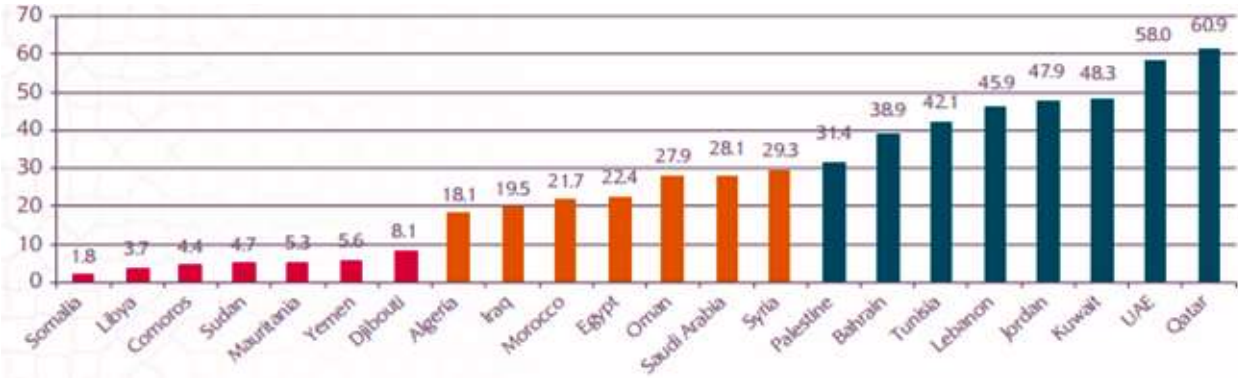


Figure 3: Facebook user penetration by total population, Arab Social Media report

2. Twitter

- **Saudi Arabia continues to dominate MENA’s Twitter market.** It is home to 40% of MENA tweeps.^{vii}
- **Twitter added 16 further Middle East “trend” locations earlier in the year,** new areas in Saudi Arabia, Qatar, Kuwait, Jordan, Oman, Bahrain, Egypt, Algeria and Lebanon are all now featured. (Location trends reflect the topics or “#” that are most popular in a specific location at certain time.)^{viii}
- **Tweets in Arabic represent 6% of the global total.** 34% in English. (2013 data reported in 2014)^{ix}

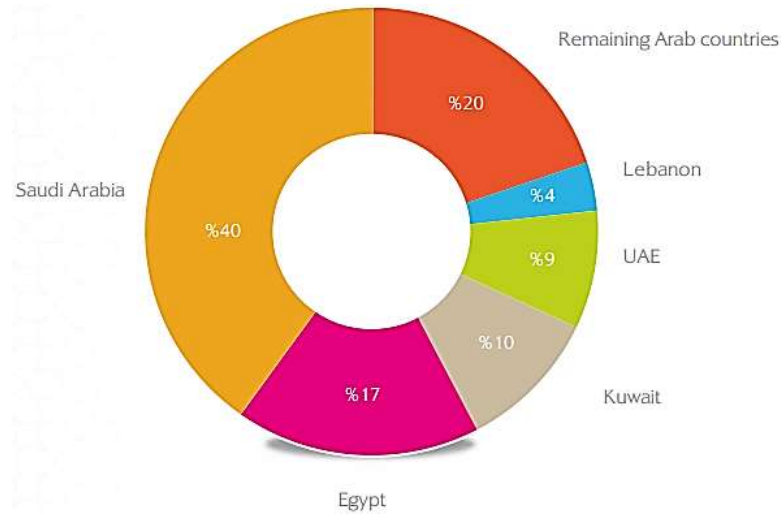
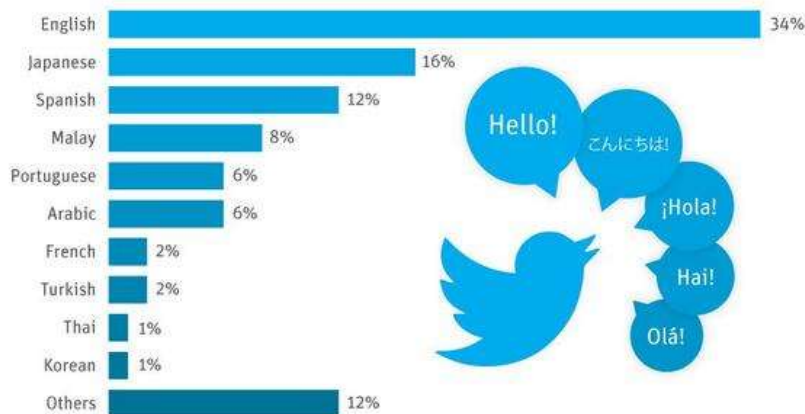


Figure 4: MENA’s top countries for Twitter, 6th Arab Social Media Report

Only 34% of All Tweets Are in English

Distribution of languages used in Tweets around the world (September 2013)



statista The Statistics Portal Mashable

Source: Semiocast

Figure 5: via @Ammr

3. Instagram

- **Instagram is the leading generator of social networking traffic across the region**, Etisalat announced at GITEX Technology Week in October. On some mobile networks the photo sharing channel consumes nearly twice the bandwidth of Facebook.^x
- **Instagram is more popular with Qataris than Facebook or Twitter**, Northwestern University in Qatar (NU-Q) found.^{xi} This finding was reinforced by new findings into social media use published in December by ictQATAR, Qatar’s Ministry of Information and Communications Technology.^{xii} **The same NU-Q study found that Instagram usage is lowest among Egyptians and Tunisians.**
- **The UAE government launched a unified Instagram account**^{xiii} promising behind-the-scenes footage of government work, including "on-the-spot information" from Cabinet meetings.
- **A "Richkidsoftehran" Instagram account was shut down in Iran in September**, the same month it was created. A counterpart "poorkidsoftehran" was also set up^{xiv} to show an alternative world.

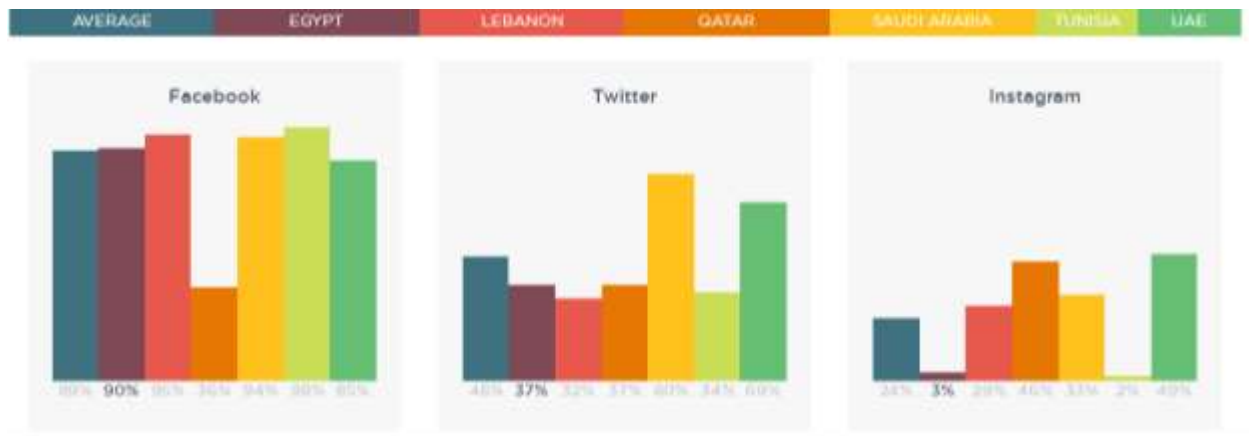


Figure 6: Usage of Instagram among Nationals, Northwestern University in Qatar and Doha Film Institute



Figure 7: Picture from the "Richkidsoftehran" Instagram account, with the tagline "'All the accessories a Persian boy needs"

4. WhatsApp

- **69% of Teen mobile Internet users in MENA use WhatsApp each month**, compared to 4% in North America, GlobalWebIndex revealed at the start of the year.^{xv}
- **WhatsApp is Qatar’s leading social media service, across all groups**, reported a new study from the Ministry of Information and Communications Technology (ictQATAR).^{xvi} Usage includes group discussions around the news, cooking and religion, as well as SMS replacement activities.
- **WhatsApp may soon be used by Emergency Services in Saudi Arabia**, using mobile technology developed by the Red Crescent Authority which will send distress messages with exact locations.^{xvii}
- **... And on a different note, a Saudi man apparently^{xviii} divorced his wife for ignoring his WhatsApp messages** and spending too much time on her phone [reported Gulf News](#).

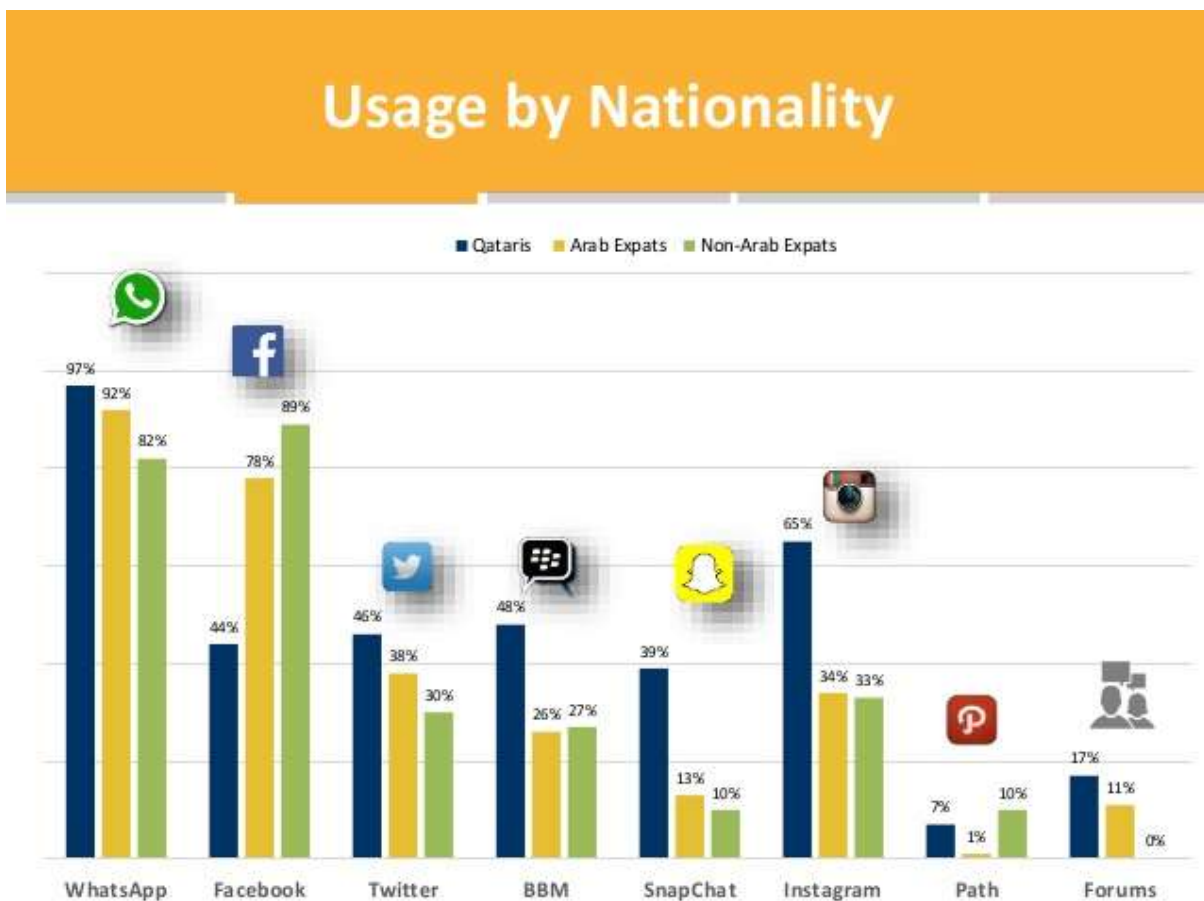


Figure 8: Usage of social channels by nationality in Qatar. icQATAR

5. Mobile

- **YouTube is, perhaps not surprisingly, the single largest source of mobile traffic in the region.** It accounts for over 25% of downstream traffic.^{xix}
- **Mobile social consumption is highest in Qatar (46%) and Israel (44%).** It is lowest in Algeria (9%) and Yemen (4%). The world average, We Are Social notes, is 21%.^{xx}
- **UAE is Viber’s third biggest market, 34% of mobile Internet users in the Emirate use^{xxi} the application monthly** behind the Philippines (44%) and Ireland (37%), compared with 12% globally.
- **Turkey and UAE are in the Top 10 global markets for Vine, with UAE teens being the third most likely to use the six-second video clip service.^{xxii}**

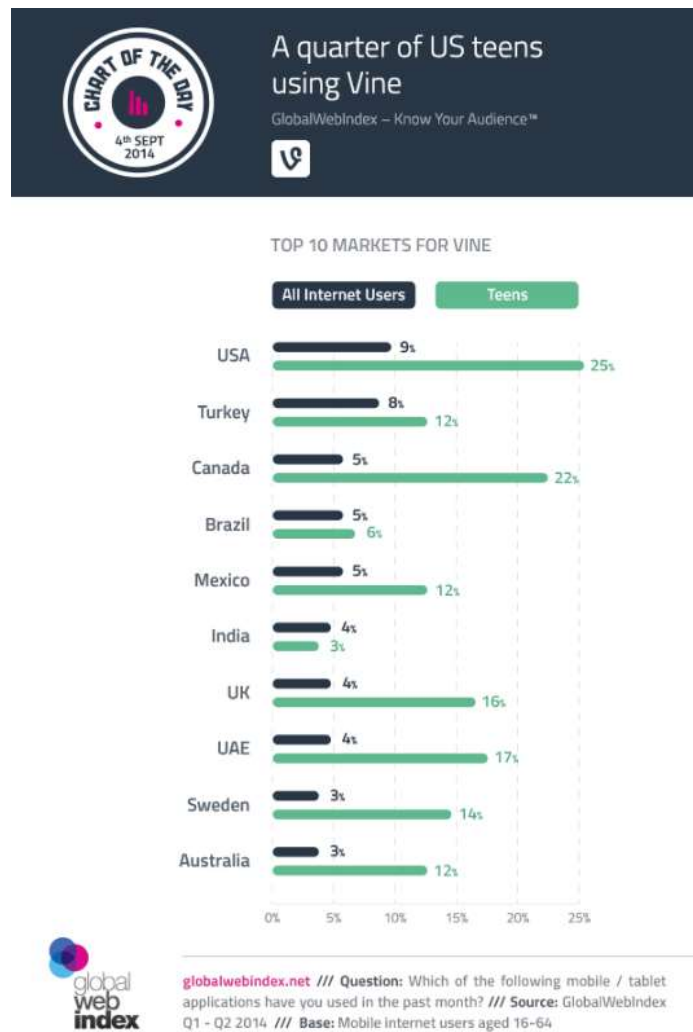


Figure 9: Top 10 markets for Vine, via GlobalWebIndex quarterly survey

6. YouTube and Video Content

- **“Viewership is growing at 50 per cent year on year, both globally and in the region, with more than one billion users visiting YouTube every month. And in MENA, a majority of that viewership is happening on mobile — a first for any region on YouTube.”**
Robert Kyncl, head of Content and Operations at YouTube^{xxiii}
- **Different countries dominate YouTube in terms of content generation.^{xxiv}** Data analysed by Startappz found that most news content on YouTube comes from Qatar and Syria, whilst Saudi Arabia leads the contribution for comedy, with UAE dominating Entertainment content.
- **YouTube content is already reaching huge audiences.** *EyshElly*, a YouTube programme created by UTURN Entertainment, has c.2.2 million subscribers and has enjoyed over 245 million views.^{xxv}
- **Video content adds to the stickiness and understanding of news content,** AP stated in a study of news consumption in Egypt, Saudi Arabia and the UAE. 75% of those surveyed are more likely to access a news story if it is accompanied by video, 83% claimed it improves their understanding.^{xxvi}

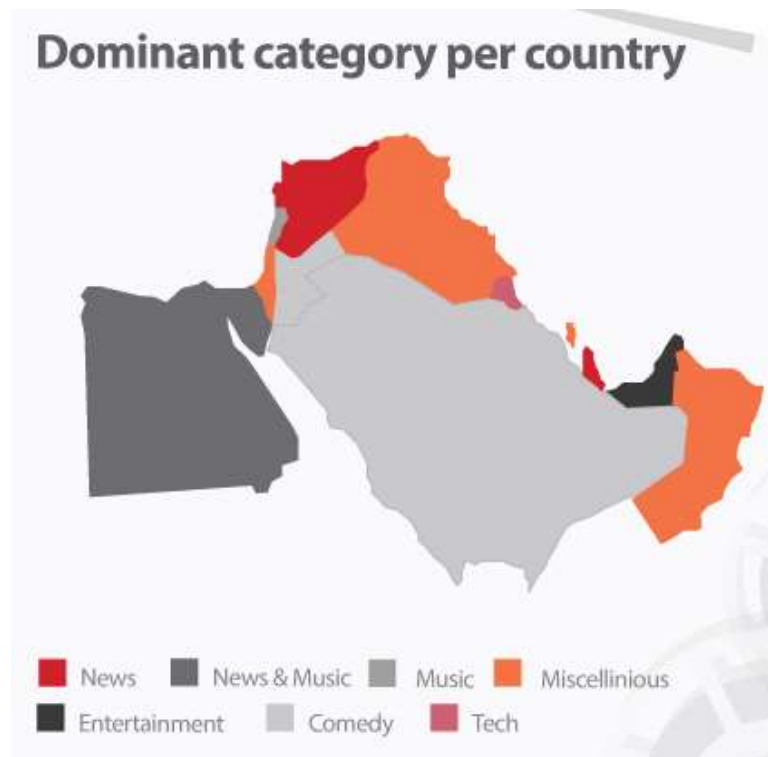


Figure 10: Extract from an infographic on YouTube production in the Middle East^{xxvii}

7. Social Media for News

- **Trust in social media as a news source growing fast for MENA Youth**, reports the annual Arab Youth Survey. Although TV remains the most trusted source of news, social media is quickly catching up. Should this trend continue, it may overtake TV in the news trust index during 2015.^{xxviii}
- **Although 59% discover the majority of their news via social, TV nonetheless remains the primary channel for breaking news, in UAE, Saudi Arabia and Egypt**, according to AP and Deloitte.^{xxix}
- **Among Internet users, a third of Qatari Nationals use WhatsApp to find out the latest news**, compared to 21% of online expats. This is the top social news source for Nationals, whereas 52% of expat Internet users in Qatar find the news on Facebook, versus just 12% of Qataris.^{xxx}

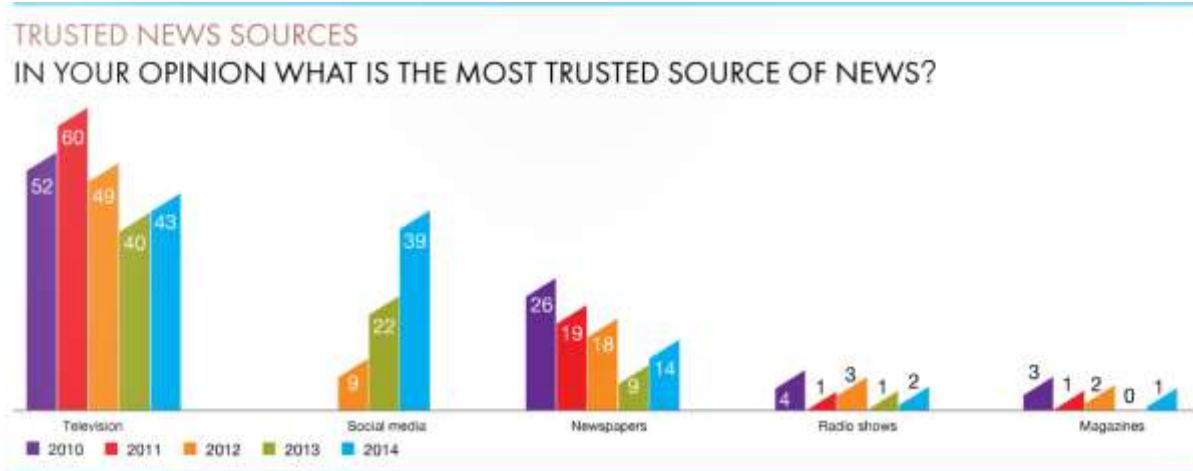


Figure 11: Trust in News Sources, Arab Youth Survey

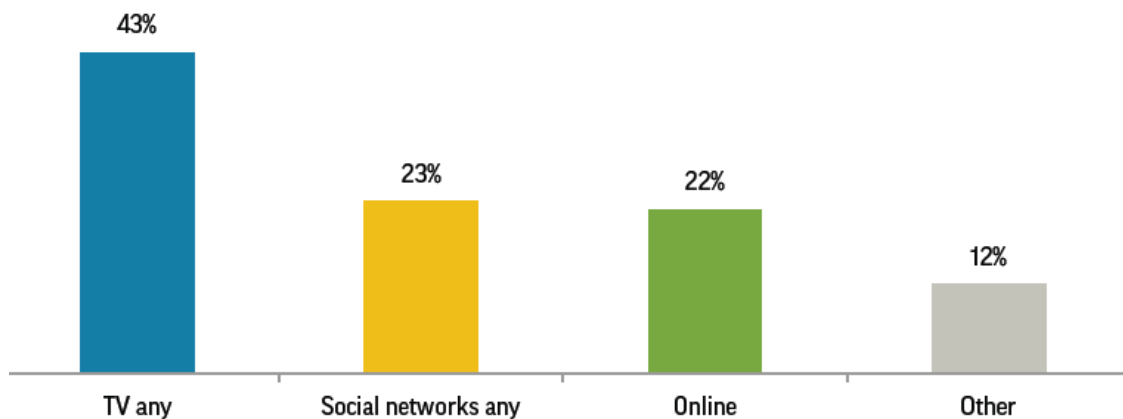


Figure 12: Sources for breaking news, AP

8. Youth

- Arab Youth may increasingly trust social media as a source for news, but TV remains the most popular news source actually consumed. They're also more likely to use online channels and newspapers – ahead of social media – for general news consumption.^{xxx1}
- Facebook, MENA's most popular social network, skews youngest in Yemen, Algeria, Palestine, Morocco and Somalia. Facebook users are more likely to be older in Kuwait, UAE and Bahrain.^{xxxii}

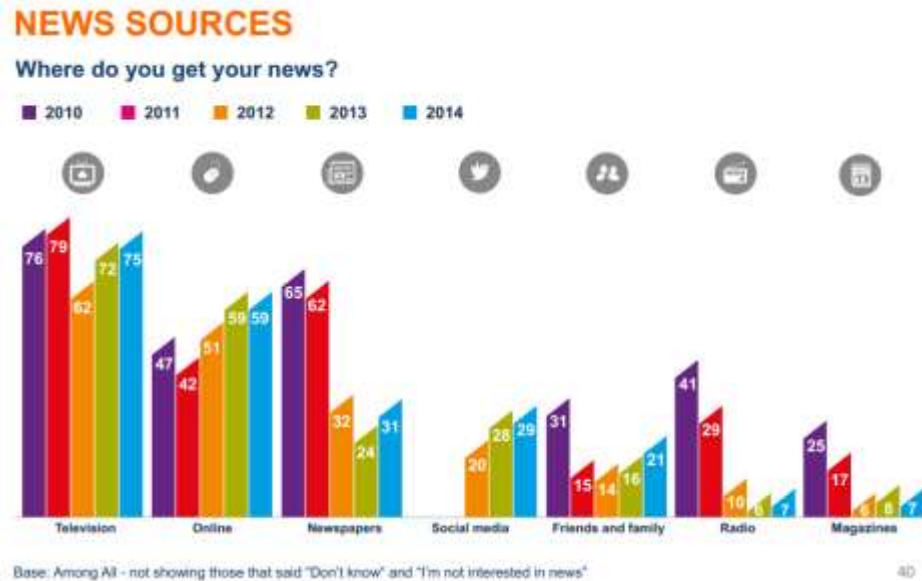


Figure 13: Sources of News, Arab Youth Study

Figure 26: Breakdown of Facebook Users by Age in the Arab States

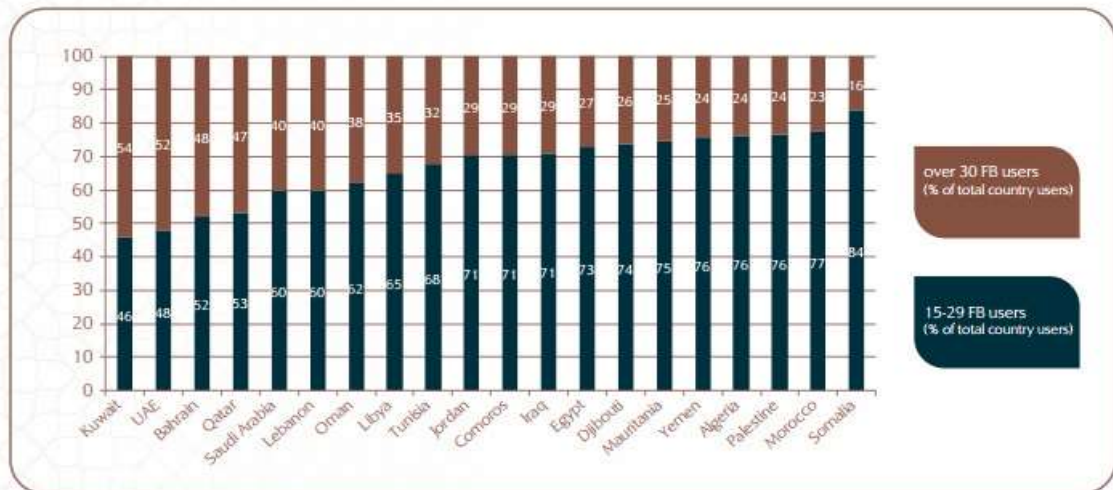


Figure 14: MENA Facebook users older vs younger, Arab Social Media Report

9. Second Screen

- **Facebook is MENA’s leading second screen activity.**^{xxxiii} A study by Ipsos covering Egypt, Saudi Arabia and UAE (and commissioned by Facebook) found that **people are 1.7 times more likely to second screen on Facebook than YouTube and 3.3 times more than Twitter.**
- **43% of people in those countries “second screen” when watching TV.** 36% use their phone, 13% use laptops and 5% use tablets.^{xxxiv} Respondents **check their Facebook Newsfeed, an average of 14 times a day**, the same research revealed. Much of this inevitably taking place whilst watching TV.
- **Second Screen activity is likely to increase as specific Social TV services come to the region.**^{xxxv} *YouToo*, for example, allows viewers to interact in real time - from the web or their mobile device - with TV programs using video, pictures, voting and social media.
- **A Second Screen influenced TV format from Israel is going global.** *Rising Star* is a talent show with a difference; it separates singers from the studio audience by a video wall. Only when a certain number of viewers have voted - using the show's app – is the wall between performer and audience lifted.^{xxxvi}



Figure 15: Image via Technology Review^{xxxvii}

2014 saw several high profile cases of tensions between Government authorities in the Middle East and some social media users.

Here are a few examples:

- **The Turkish government took Twitter offline on March 20th**, a move which a Turkish court later deemed unconstitutional.^{xxxviii} **Efforts were also made by the Turkish Government to block YouTube at this time.**^{xxxix}
- **Saudi Arabia jailed three lawyers in October** for five to eight years and banned them from using social media **following tweets that undermined the judiciary**, [official news agency SPA said](#).^{xl}
- **The country is also considering changes to its Anti-Cybercrime Law**, to target social networking sites which promote content at odds with Islamic values, the *Saudi Gazette* reported. It noted that: "Researcher and consultant of new media uses and Shoura Council member Dr. Fayez al-Shehri told Al-Hayat Arabic daily that there are around 25,000 accounts on Twitter targeting Saudis. There are around 4,500 accounts that promote atheism. Around 15,000-25,000 of such accounts are in Arabic language." Al-Shehri described this as a "cultural war".^{xli}
- **"Egypt Begins Surveillance Of Facebook, Twitter, And Skype On Unprecedented Scale,"** [Buzzfeed reported](#) in September.^{xlii}
- **An appeal by the blogger Raif Badawi saw his sentence increased by the Saudi courts in May from 600 lashings and seven years in prison, to 1,000 lashings and 10 years imprisonment.** *Deutsche Welle* [recounted](#) that he was also fined 1 million riyals, akin to c.200,000 euros, for "violating Islamic values and propagating liberal thought." In the same article^{xliii} the sentence was described as "extremely harsh," by Ali H. Alyami, head of the Washington-based Center for Democracy and Human Rights in Saudi Arabia. This week the Guardian reported that the start of this sentence had been carried out.^{xliv}



xlv

1. **Instagram usage will continue to grow rapidly**, fuelled by smartphones and a love of visual communication. In some markets like Lebanon, it will overtake Twitter for the first time.
2. **Messaging apps like WhatsApp and Snapchat will also grow rapidly**. Their closed nature will appeal to privacy concerns of many users. They already account for 10% of mobile data traffic.^{xlvi}
3. **Government bodies will substantially increase their efforts to engage with citizens through emerging social channels like Instagram, Snapchat and WhatsApp**, not least because the reach of their exiting social media efforts are often ineffective.^{xlvii}
4. **Mobile games will see further growth and impact on second – and first - screen behaviours**. Content publishers – from TV networks to News Providers – will need to engage in this space.
5. **#HajjSelfie showed how tensions can inevitably arise between modern technology, social media and traditional cultural sensibilities**.^{xlviii} We will see more of these examples in 2015, and hopefully there will be opportunities for balanced discussions about how to address these concerns.

Finally, I hope that we will also start to see more truly regional data about social media take-up and behaviours, including emerging – underreported - platforms like WhatsApp and Snapchat. Too often studies purporting to tell regional conclusions only focus on the major markets of Egypt, Saudi Arabia and UAE. Granted, these are key media markets, but variances do exist across other countries, and these need to be taken into consideration if a true picture of social media in MENA is to be provided.

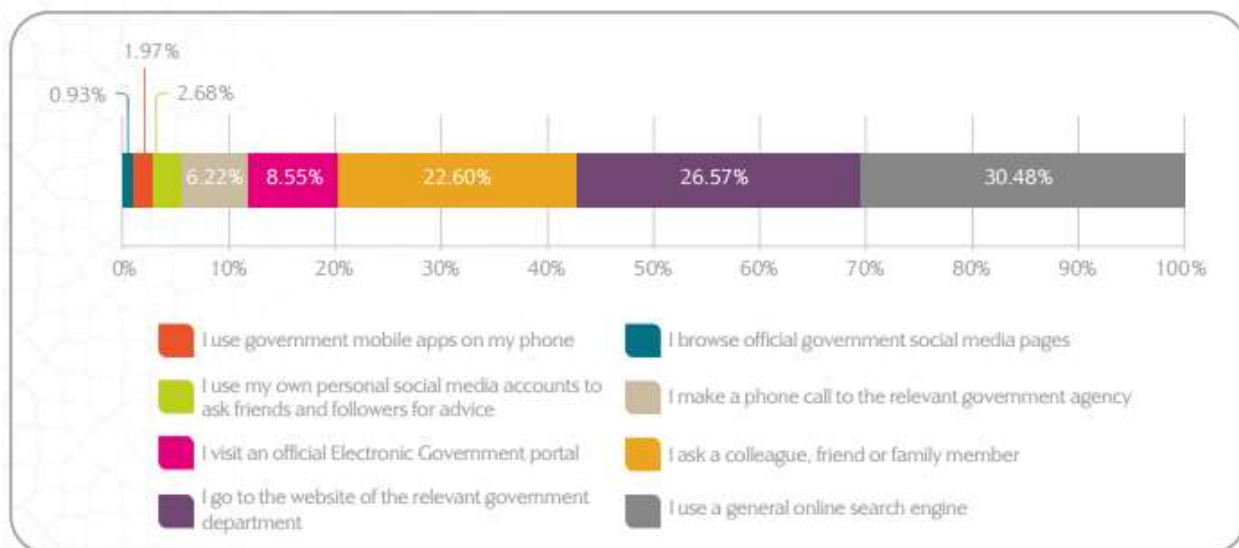


Figure 16: How people in the Middle East find Government information online

- Cover images: <http://uthmag.com/wp-content/uploads/2012/06/arab-youth-in-UAE.jpg>
 And <http://www.mediabistro.com/alltwitter/files/2013/10/social-media-apps-iphone.jpg>
- ⁱ We are Social: <http://bit.ly/1uiYVoG>
- ⁱⁱ http://arabstates.gsmamobileeconomy.com/GSMA_ME_Arab_States_2014.pdf
- ⁱⁱⁱ Gulfbusiness <http://bit.ly/1vLk34J>
- ^{iv} <http://mideastmedia.org/>
- ^v https://www.zawya.com/story/Facebook_Outlines_Strategy_to_Meet_the_Challenges_of_Tomorrow_at_Abu_Dhabi_Media_Summit_Highlights_the_Future_of_Storytelling_on_Video-ZAWYA20141119112121/
- ^{vi} http://allfacebook.com/northwestern-university-qatar-doha-film-institute-middle-east-study_b131129
- ^{vii} 6th Arab Social Media Report: <http://bit.ly/1r6QKL>
- ^{viii} The Next Web: <http://tnw.co/1dooRIB>
- ^{ix} <https://twitter.com/ammr/status/435043935564869632>
- ^x <http://www.marketwatch.com/story/etisalat-and-sandvine-reveal-latest-middle-eastern-internet-trends-2014-10-16>
- ^{xi} <http://mideastmedia.org/>
- ^{xii} www.ictqatar.qa/en/news-events/news/ictqatar's-rassed-unveils-findings-new-study-social-media-usage-qatar
- ^{xiii} <http://www.itp.net/600964-uae-government-launches-official-instagram-account>
- ^{xiv} <http://www.middle-east-online.com/english/?id=68418>
- ^{xv} <http://tfour.me/2014/04/whatsapp-in-the-middle-east-and-africa-region/>
- ^{xvi} www.slideshare.net/ictQATAR/how-qatar-uses-whatsapp-snapchat-and-other-social-media
- ^{xvii} Arabnews: <http://bit.ly/11Nj7Ct>
- ^{xviii} <http://gulfnews.com/news/gulf/saudi-arabia/saudi-wife-divorced-for-ignoring-husband-s-whatsapp-messages-1.1412866#.VGdvtxWr TE.twitter>
- ^{xix} <http://www.marketwatch.com/story/etisalat-and-sandvine-reveal-latest-middle-eastern-internet-trends-2014-10-16>
- ^{xx} <http://www.slideshare.net/wearesocialsg/social-digital-mobile-in-the-middle-east-north-africa-turkey> - Slide 10
- ^{xxi} Via Global Web Index daily email, 25th September 2014
- ^{xxii} <http://blog.globalwebindex.net/a-quarter-of-US-teens-Vine>
- ^{xxiii} <http://gulfbusiness.com/2014/10/40-uae-youtube-users-come-mobile/>
- ^{xxiv} http://www.startappz.com/wp-content/uploads/2014/03/Youtube-infographic_02-31.png
- ^{xxv} <https://www.youtube.com/user/EyshElly/about> cited in How Young Arabs are Fuelling the MENA Media Market, published by management consultancy Strategy & and Media Zone Authority Abu Dhabi: http://www.admediasummit.com/en/Images/How-Young-Arabs-are-Fuelling-the-MENA-Media-Market-English_tcm30-22790.pdf
- ^{xxvi} <http://www.ap.org/Content/Press-Release/2014/Study-Middle-East-news-consumers-demand-trustworthy-high-quality-content>
- ^{xxvii} http://www.startappz.com/wp-content/uploads/2014/03/Youtube-infographic_02-31.png
- ^{xxviii} Arab Youth Study: <http://bit.ly/1lgPQH6>
- ^{xxix} Spring Tide: The new era for video news in the MENA region: <http://bit.ly/YBbmOS>
- ^{xxx} www.bbc.co.uk/blogs/blogcollegeofjournalism/posts/WhatsApp-now-clear-social-media-leader-in-Qatar-including-for-news
- ^{xxxi} Arab Youth Study: <http://bit.ly/1lgPQH6>
- ^{xxxii} 6th Arab Social Media Report: <http://bit.ly/1r6QKL>
- ^{xxxiii} http://www.zawya.com/story/Reach_of_Facebook_is_higher_than_leading_digital_platforms_in_UAE_KSA_Egypt_study_reveals-ZAWYA20140505100552/
- ^{xxxiv} <http://on.fb.me/1hHm1v>
- ^{xxxv} <http://bit.ly/1hzRXRw>
- ^{xxxvi} <http://www.theguardian.com/tv-and-radio/2014/apr/12/10-viewing-trends-for-2014-future-tv-twitter-youtube-amazon>

- xxxvii : <http://bit.ly/1g9Ezqk>
- xxxviii <http://www.cnet.com/news/court-deems-turkeys-twitter-ban-unconstitutional/>
- xxxix <http://www.cnet.com/news/turkey-tries-to-block-youtube-after-syria-security-leak/>
- xl <http://www.middleeasteye.net/news/saudi-arabia-jails-three-lawyers-calling-judiciary-backwards-twitter-41342875>
- xli <http://english.alarabiya.net/en/media/digital/2014/06/02/Saudi-Arabia-amending-laws-to-monitor-social-media.html>
- xlii <http://www.buzzfeed.com/sheerafrenkel/egypt-begins-surveillance-of-facebook-twitter-and-skype-on-u>
- xliii <http://www.dw.de/saudi-religious-police-crack-down-on-bloggers/a-18113104>
- xliv www.theguardian.com/world/2015/jan/09/saudi-blogger-first-lashes-raif-badawi
- xlv Image also via: <http://www.dw.de/saudi-religious-police-crack-down-on-bloggers/a-18113104#>
- xlvi <http://www.marketwatch.com/story/etisalat-and-sandvine-reveal-latest-middle-eastern-internet-trends-2014-10-16>
- xlvii Source: Arab Social Media Report : <http://bit.ly/1lr6QKL>
- xlviii <http://www.middleeasteye.net/news/snap-hajj-selfies-gain-popularity-spark-controversy-972279647>

Further Reading

Selected research recommendations:

- **We Are Social:** [Social, Digital & Mobile in The Middle East, North Africa & Turkey](#) (July 2014)
- **Mohammed Bin Rashid School of Government:** [Arab Social Media Report \(Issue 6\)](#) (2014)
- **ictQATAR:** [Research round-ups](#) (monthly and quarterly), [Study into emerging social media](#) (2014)
- **Arab Youth Survey 2014:** [Presentation](#), [White Paper](#), [Top 10 Findings PDF](#)
- **Strategy &:** [How Young Arabs are Fuelling the MENA Media Market](#) (2014)
- **Northwestern University in Qatar and the Doha Film Institute:** [Entertainment Media Use in the Middle East](#) (2014)

Please also see previous annual round-ups which were produced whilst I worked for Qatar's Ministry of Information and Communications Technology ([ictQATAR](#)):

- **Social Media in the Middle East: The Story of 2013** ([English](#), [Arabic](#))
- **Social Media in the MENA – 2012 Review** ([English](#), [Arabic](#))



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