



قمة رواد التواصل الاجتماعي العرب  
Arab Social Media Influencers Summit



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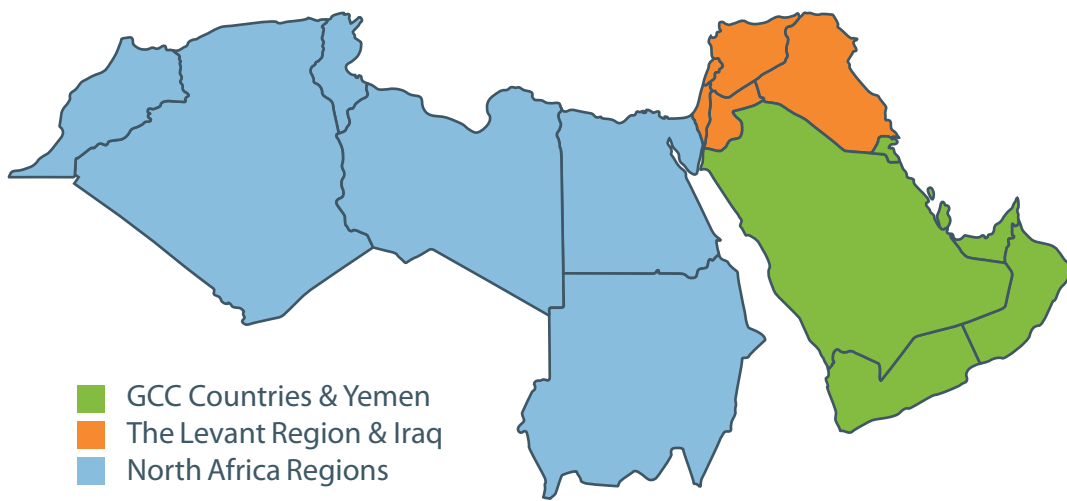
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# 1. Executive Summary

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Over the past decade, social media has exhibited an exponential penetration into the daily lives of individuals, the operations of businesses, and the interaction between governments and their respective people. It would not be far from the truth to state that social media has become an essential requirement for our daily personal and business life.

This social media report is the first and largest research study of its kind in the Arab World that is aimed at gauging the perceptions of the users in the Arab world vis-à-vis social media, as well as describing their social media usage habits. Furthermore, the study is aimed at identifying the impacts of social media on society, the economy and businesses.



 **Regional Coverage**

**The study comprised of a qualitative research module and a quantitative survey:**

1- The qualitative research module was conducted on a regional level (GCC Countries & Yemen, the Levant & Iraq and North Africa):

- Focus Group Discussions with active users of social media
- In-depth Interviews with experts in relevant fields such as media / communications, economics, and government affairs.

2- The quantitative survey was conducted via Telephone Interviews with a sample more than 7000 users of social media spread evenly across 18 Arab countries.



**More than 7000 Interviews**



**In-depth Interviews**



**Focus Group Discussions**



**Study covered Users of Social Media aged 15+ years**

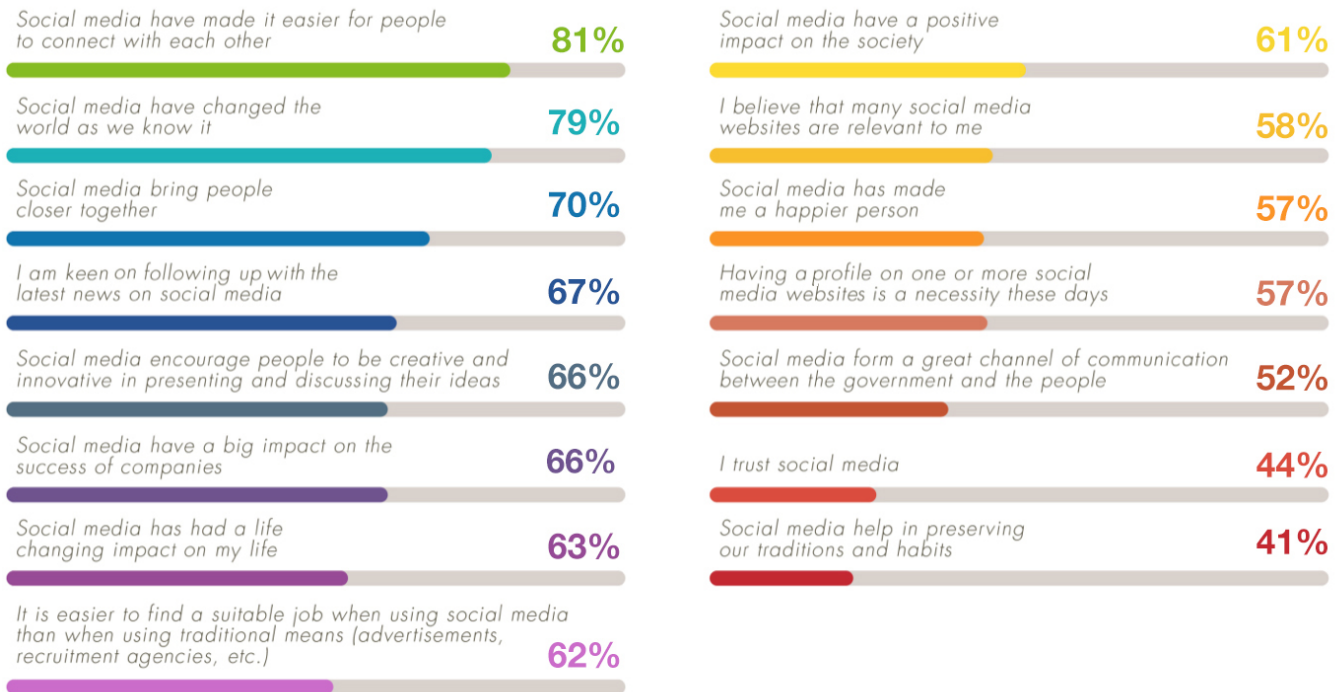


**Sample Design**

## Key Findings

### A) Perceptions about Social Media

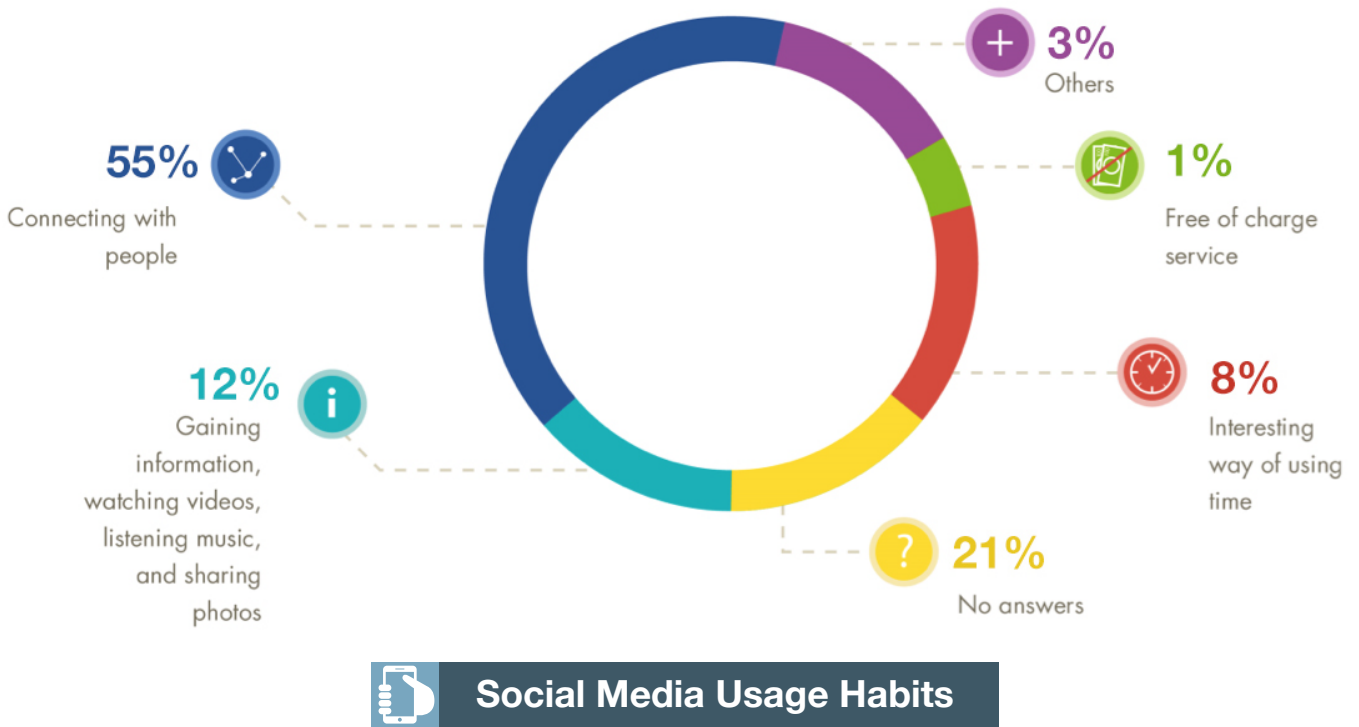
- Social media in the Arab world is perceived as having numerous positive aspects that enhance the quality of life of individuals, business profitability and governmental interaction with the public.
- Users do, however, show lack of trust in social media. Also, they believe that social media has negative effects on the local cultures and traditions.



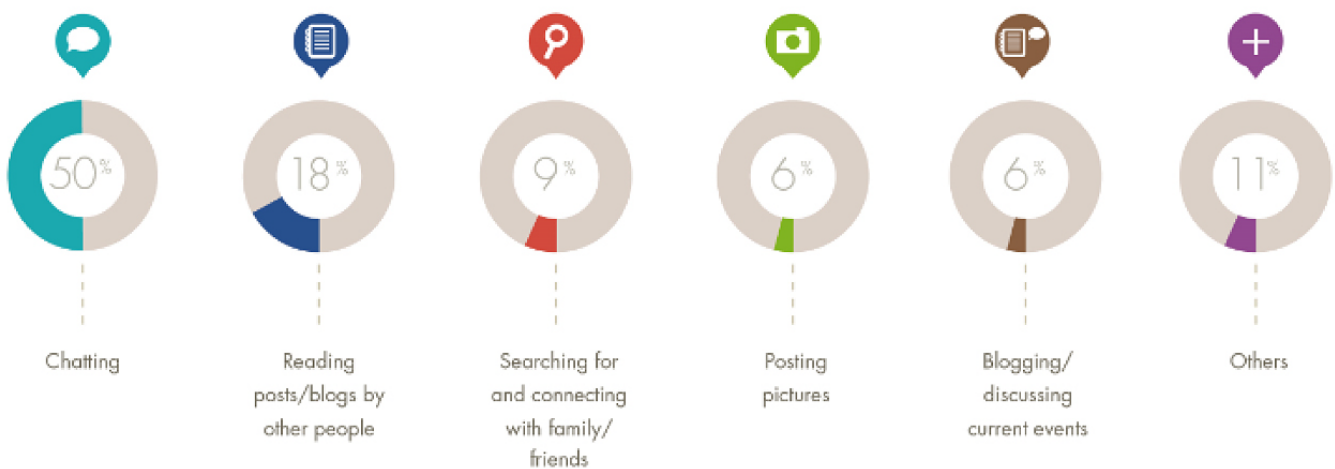
### Perceptions about Social Media

## B) Social Media Usage Habits

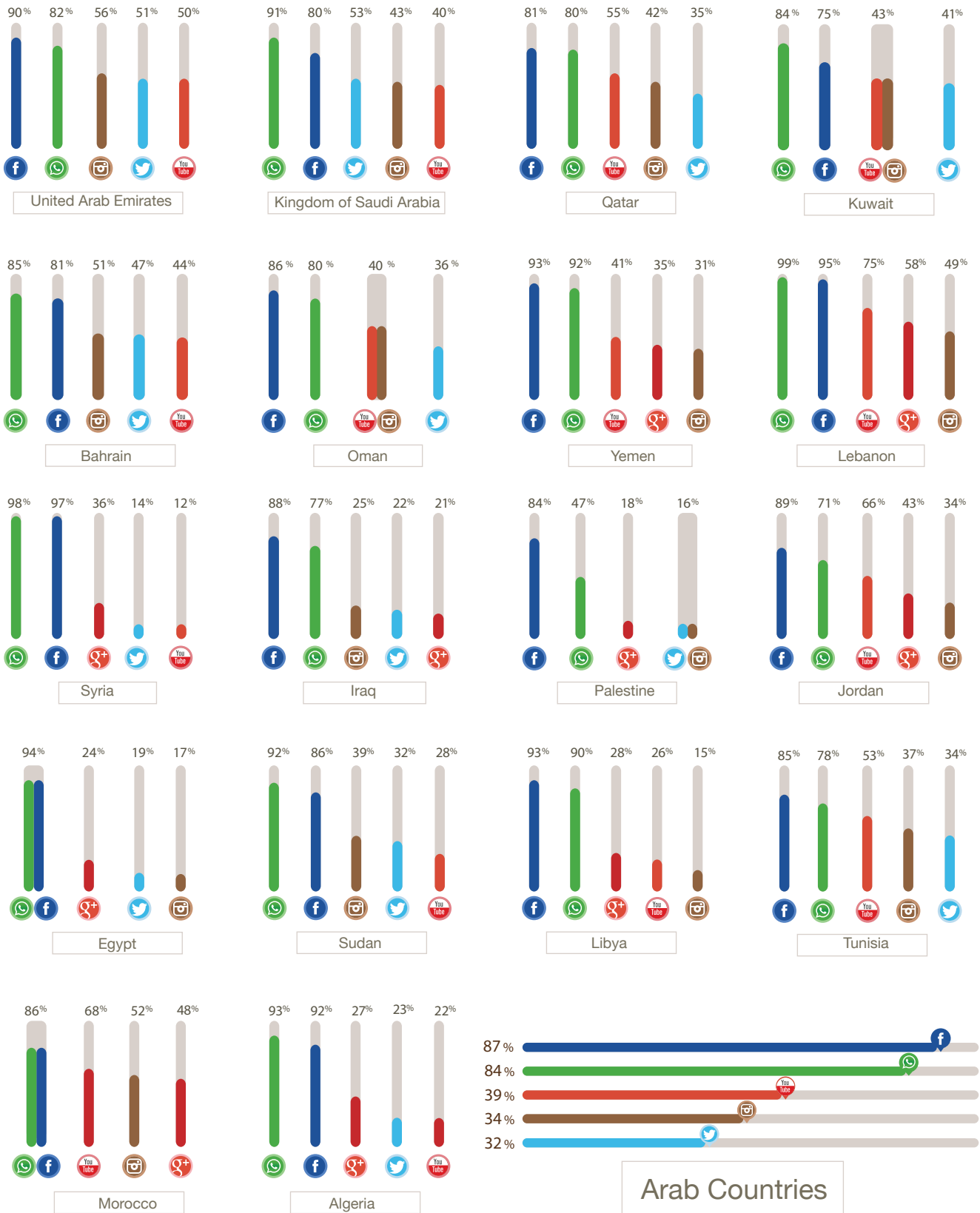
- More than half the users in the Arab World use social media primarily to connect with people. While gaining information, watching videos, listening to music and sharing photos came as the second top main reason for using social media.



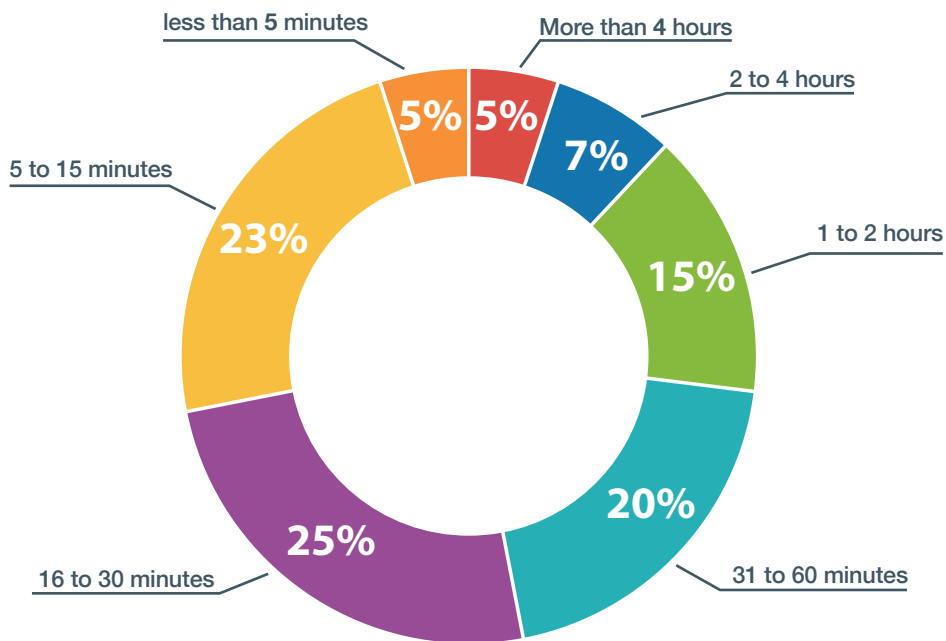
- Chatting is the most common activity among users in the Arab world, followed by reading posts added by other people.



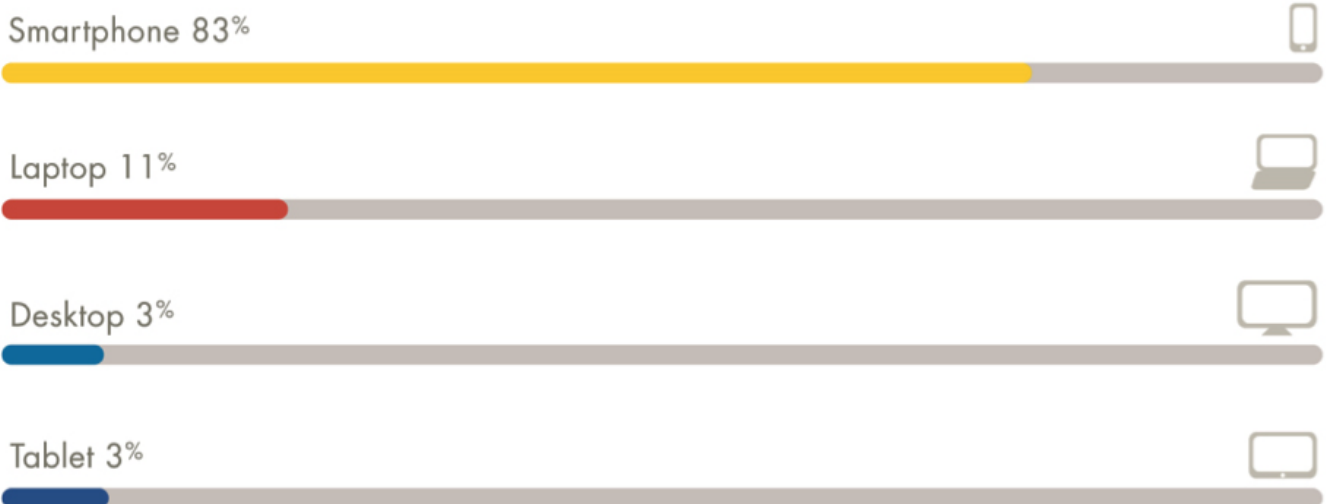
- Facebook and WhatsApp are the most used social media channels across the Arab world. While Facebook was the top used social media channel on the aggregate level of the Arab World.



- On average, one third of users spend less than 30 minutes per session when using social media, and 5% spend more than 4 hours per session. More than half the users are most active on social media during evening hours.





 Average Length of Session When Using Social Media

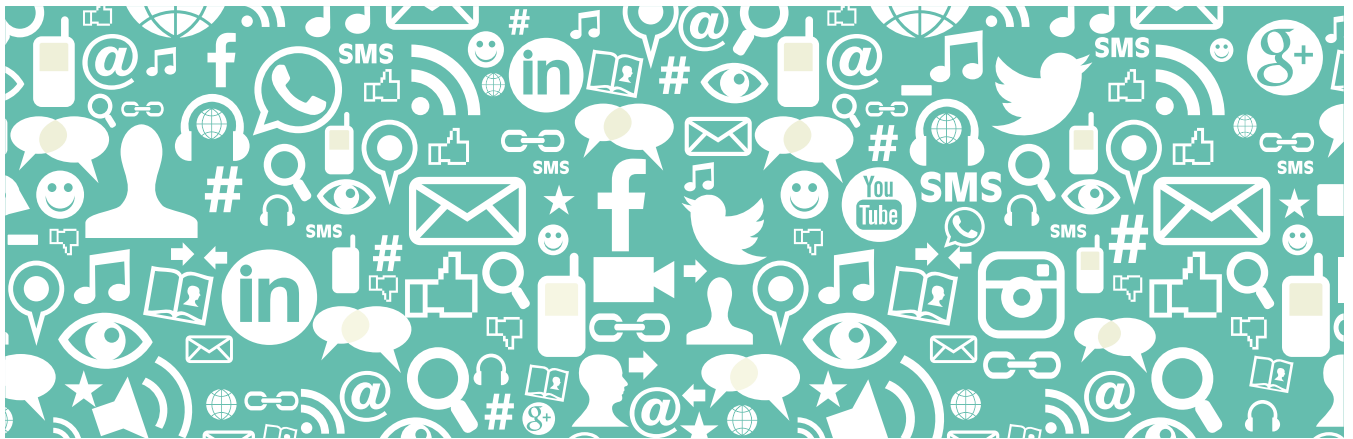




## C) Social Media Impacts

	 <b>Pros</b>	 <b>Cons</b>
<b>On Arab Society</b>	<ul style="list-style-type: none"> <li>- Connecting people together and shortening distances between them</li> <li>- Instant platform to get news and information</li> <li>- Aid in learning new things</li> <li>- Offers entertainment features</li> <li>- Allows for “cheap” means of communication</li> <li>- Offers opportunities for job hunting and career growth</li> </ul>	<ul style="list-style-type: none"> <li>- Non-conducive of personal interaction between people</li> <li>- Family fragmentation</li> <li>- Addictive</li> <li>- Conducive of an inactive and lethargic life</li> <li>- Risk of being exposed to improper material</li> <li>- Weakened communication skills</li> <li>- Inaccurate and misleading information</li> <li>- Incompatible with the Arabic culture</li> </ul>
<b>On Business and Economy</b>	<ul style="list-style-type: none"> <li>- Enables faster business growth and expansion</li> <li>- Direct revenue generation through social media</li> <li>- Improving corporate image</li> <li>- Marketing and advertisement platform</li> <li>- Talent hunt</li> <li>- Encourage consumer-centric and transparent approaches</li> </ul>	<ul style="list-style-type: none"> <li>- Risk tarnishing corporate reputation</li> <li>- Social media poses a threat to traditional media by taking a piece of their market shares</li> </ul>

## 2. Introduction



With the birth and rise of social media, internet users in the Arab world were quick to embrace the new technology and utilize all what social media has to offer to connect, communicate and share information with others.

The youths in the Arab world were among the top groups in social media usage. However, they were soon joined by other segments of the population. Shortly after that, businesses and media were swift to ride the new wave of social media to establish virtual presence, connect with their respective customers and leads, and to advertise their products and services.

Also, the Arab governments have realized the importance of social media, and in turn, began leveraging the new online territories. This has supported the communication between the key players in each Arab country: the population at large, the businesses and the government.

With the insertion of new social media channels, users in the Arab world were quick to create new usages for these channels. Nowadays, users resort to social media to chat, keep updated on current events, share ideas/pictures/videos/etc., get information on specific topics, or simply to connect with the online world.

Populations in the Arab world are considered youthful since more than one-third of the population in each country consists of people aged **25** years or younger. Youth represents the majority of social media users in Arab world, as of June **2013** the percentage of total users between **16** and **34** years was **77%**<sup>1</sup>. Also, in May **2014** the percentage of total Facebook users between **15** and **29** years old reached to **67%**<sup>2</sup>.

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<sup>1</sup> Go-Gulf. 2013. "Social Media Usage in Middle East - Statistics and Trends".

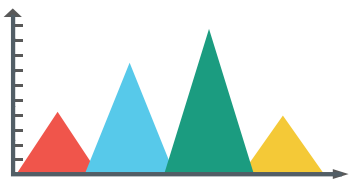
<sup>2</sup> Mohammed Bin Rashid School of Government. 2014. "Citizen Engagement and Public Services in the Arab World: The Potential of Social Media". 6th Edition. (<http://www.go-gulf.ae/blog/social-media-middle-east/>)

## **3. Research Objectives and Approach**

## The main objectives of the study are:



1. Understand the social and economic impacts of social media in the Arab World from the perspective of social media users, economists, public relations and advertising agencies, journalists, and government officials.



2. Describe the usage patterns of social media in the Arab World.



3. Gauge the perceptions of users of social media in the Arab World towards key social media channels.

The findings of the study would contribute into developing the appropriate strategies to optimize the usage of social media so that their positive impacts are enhanced and their negative effects, if any, are eradicated. To that end, the study included a qualitative as well as a quantitative phase of data collection:

### Qualitative Study

The qualitative research module was used to get insights from users of social media on their perceptions about social media and their expectations thereof. Furthermore, the qualitative research methods were resorted to in order to get feedback from experts in communications, economics, media and government affairs to capture their assessments and views of the impacts that social media has had on the society, the economy and the business world in the Arab World.

The qualitative research module was conducted via Focus Group Discussions (FGD) among users of social media and In-depth Interviews (IDI) with experts in key fields and disciplines.

### Quantitative Study

The quantitative research module was used to ascertain the usage habits and consumption patterns of social media. Moreover, the quantitative survey aimed at providing relevant numerical figures about key preferences and perceptions of social media users about key social media channels.

The quantitative survey was carried out via Telephone Interviews.

Fieldwork for the study took place between October 19th and November 20th, 2014.

## **4. Target Groups and Sample Design**

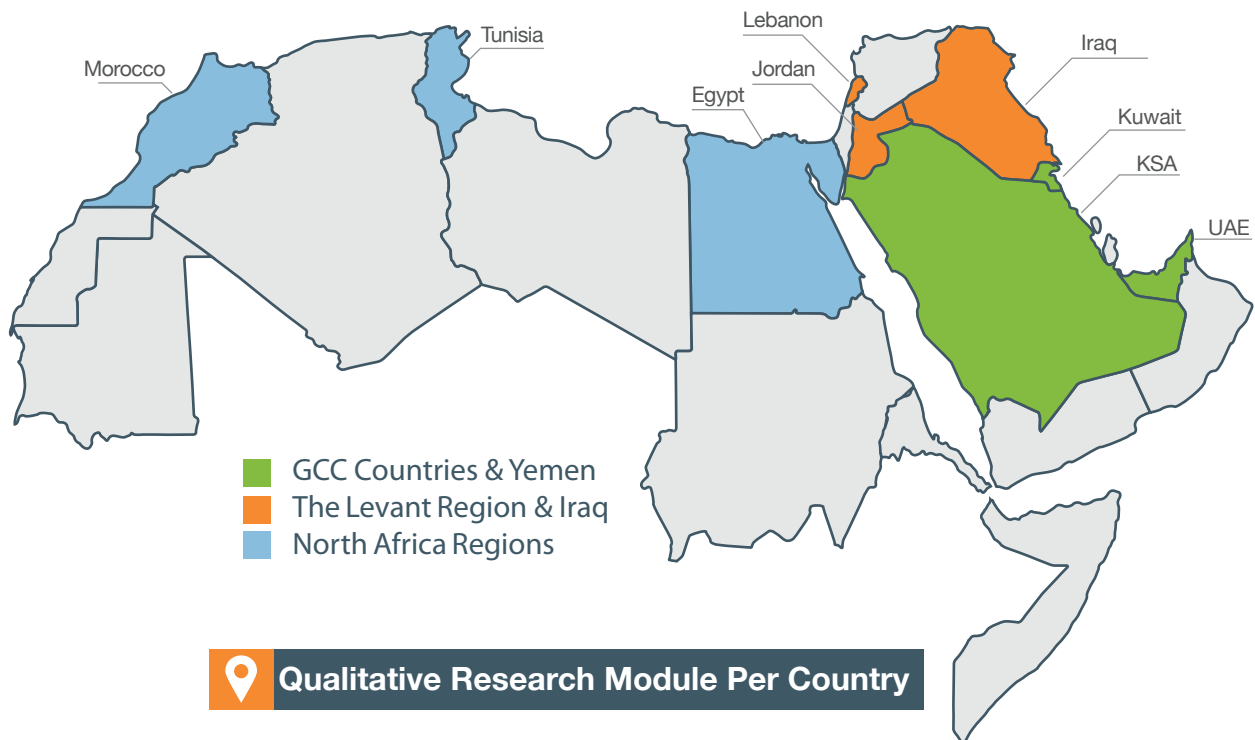
## There were two main target groups for the study, namely:

- 1-Active users of social media: Individuals aged 15+ years who currently use at least one social media channel on regular basis.
- 2-Experts in the fields of communications, media,



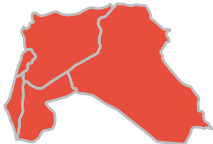



### The study was conducted:

- 1- GCC countries and Yemen: United Arab Emirates, Kingdom of Saudi Arabia, Kuwait, Bahrain, Qatar, Oman, and Yemen.
- 2- The Levant Region: Lebanon, Syria, Palestine, Jordan and Iraq.
- 3- North Africa: Egypt, Libya, Tunisia, Algeria, Morocco and Sudan.

The qualitative research module was conducted on a regional level in select countries (3 countries per region), whereas the quantitative survey was conducted in all the aforementioned countries. We have conducted Focus Group Discussions and in-depth Interviews across 9 countries



For the quantitative survey, the sample size per country was set so that to ensure the margin of error of the survey findings does not exceed 5% at the 95% confidence level. At the 95% confidence level, the minimum sample to ensure the margin of error is less than 5% would be (n=386). This sample size has been rounded off to (n=400) per country.

Region	Country	Subtotal
 <p>GCC &amp; Yemen</p>	UAE	 <p>2836</p>
	KSA	
	Kuwait	
	Bahrain	
	Qatar	
	Oman	
	Yemen	
 <p>The Levant &amp; Iraq</p>	Lebanon	 <p>2034</p>
	Jordan	
	Iraq	
	Palestine	
	Syria	
 <p>North Africa</p>	Egypt	 <p>2412</p>
	Libya	
	Tunisia	
	Algeria	
	Morocco	
	Sudan	
<b>Total :</b>		<b>7282</b>

 **Sample Size of the Quantitative Survey**

Note: The sample was equally split between males and females. Random fall-out by other basic socio-demographic variables was observed.



## **5. Key Findings of the Study**

# A) Qualitative Views of the Social Media

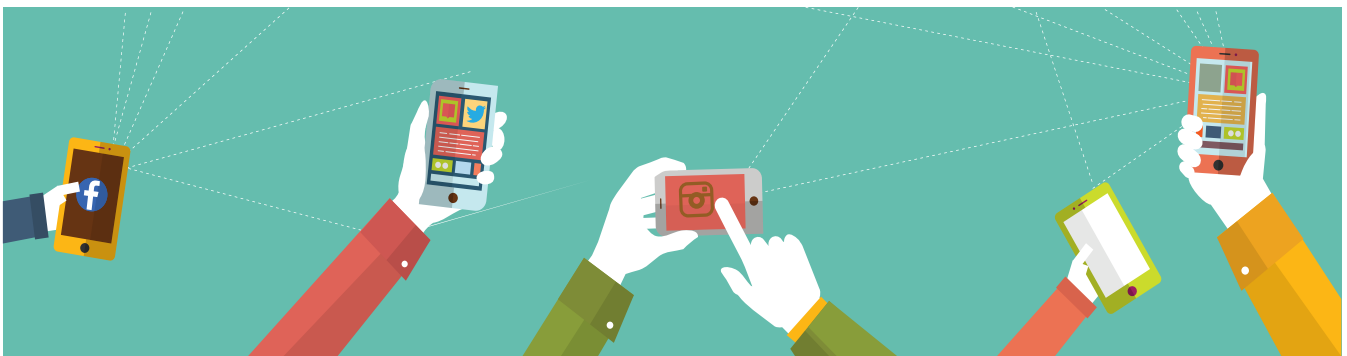
Social media is perceived to satisfy different needs for different Arab individuals. It is used for a multitude of purposes in many different ways by different users.

The Arab social media users can be classified in the following five main clusters based on their attitude and behavior towards social media.



Social Butterflies	
<b>Who are they?</b>	<ul style="list-style-type: none"> <li>- This category makes up a good proportion of the users in general. These individuals are highly social, engage with multiple groups and have a large circle of friends.</li> <li>- This category spreads equally all across the Arab region.</li> </ul>
<b>Main benefit of social media</b>	<p><b>Communication and connectivity:</b></p> <ul style="list-style-type: none"> <li>- Social media is an exciting tool to keep in touch and interact with friends and family.</li> <li>- Social media is an amazing tool also to reunite with friends they have not been in contact with for a long time, such as old classmates.</li> <li>- These individuals are also very open to making new friends through the use of social media.</li> </ul> <p><b>Entertainment:</b></p> <ul style="list-style-type: none"> <li>- Social media is an entertaining tool, i.e. following up feeds about their friends and family, watching movies and entertaining clips, listening to music, reading articles, and much more.</li> </ul>

Explorers	
<b>Who are they?</b>	This cluster is also well spread all across the Arab regions. These individuals are in a constant quest for novelty. They are quick to learn new features.
<b>Main benefit of social media</b>	<p><b>Knowledge and discovery:</b></p> <ul style="list-style-type: none"> <li>- Social media primarily is a tool for them to learn and discover new things. This could be through reading articles, watching clips, listening to the news, discovering new places, etc.</li> <li>- These individuals do not necessarily share this knowledge with others.</li> </ul>
Achievers	
<b>Who are they?</b>	<p>These individuals are perceived to be leaders. They are ambitious people, aiming high in life. They are highly active; they are involved in numerous activities, be it social, intellectual or professional.</p> <p>They are curious individuals and eager to improve their knowledge. However, they are in the quest for logical arguments and proofs.</p> <p>Contrarily to explorers, achievers are action-oriented and share their knowledge and education with others.</p>
<b>Main benefit of social media</b>	<p><b>Dynamism and interactivity:</b></p> <ul style="list-style-type: none"> <li>- Social media is praised for its dynamism. They are able to receive and share news on the spot.</li> <li>- Additionally, more than any other medium, social media enables interactivity with the shared materials and with other users.</li> </ul> <p><b>Achievements:</b></p> <ul style="list-style-type: none"> <li>- Through knowledge building, hence helping in their personal as well as professional lives.</li> <li>- Being ahead of others and achieving success.</li> <li>- Success on the professional front; gaining knowledge, opening opportunities to open new businesses (e.g. selling through Social page).</li> </ul>
Escapists	
<b>Who are they?</b>	These individuals long for sociability yet they do not have a large circle of friends. They are sensitive, trusting and even gullible at times.
<b>Main benefit of social media</b>	<p><b>Communication enabler:</b></p> <ul style="list-style-type: none"> <li>- For these individuals, Social Media enables them to easily communicate with others without feeling shy. It is like a shield that helps them face others easily.</li> </ul>
Pragmatics	
<b>Who are they?</b>	Minimalistic usage, i.e. using social media only when necessary, and when useful. These users are mainstreamers, using the most popular channels only. This group exists mainly in the Levant region.
<b>Main benefit of social media</b>	Functional benefit of communication mostly, and gaining knowledge.



## Life values

Social Media users in the Arab world have a **lifestyle** that revolves around the use of technology and social media with constant update checking and posting of materials. The usage levels are seen to be higher in the Levant region in particular, with the use of a diversity of social media channels for different purposes

On the social level, social media users are engaged in individual and collective activities with family members and friends when not connected to the internet. In the Arabian Peninsula in particular, we notice a higher involvement in family time than in Levant and North Africa regions.

“When I wake up, I check my phone and find out what my friends messaged me over WhatsApp or Facebook. I check all updates so when I don't have college, I see who's available and plan for something with him

15-24 year old,  
Lebanese male

“I sleep while holding my smartphone in my hand. Sometimes I dream that I am still using the internet

25-35 year old,  
Egyptian female

“I will open a spa and a club; buy a lot of books and travel

15-24 year old,  
Kuwaiti female

Dreams and aspirations mostly revolve around grand life values such as family, wellbeing and happiness. Also, dreams of achievements at career and entrepreneurial drive!

## Meaning of Social Media in the Arab World

**Social Media in the Arab world is a critical part of everyday life** – as much a necessity as food, water and shelter because it is impossible to imagine life without it.

For Arab individuals, Social Media is likened to a ‘magic wand’; offering the world at their fingertips.

Arab users believe Social Media serves as a ‘**life enhancer**’; brightening up one’s day and adding excitement to their lives. For many young Arab individuals, being connected to social media makes them feel “alive”!

This description of social media is true throughout all the surveyed Arab regions, without any exception.



# B) Usage and Attitudes Towards Social Media

## 1- General Perceptions About Social Media

Users perceive that social media has made the world smaller by connecting people together regardless of the geographical distances and cultural differences that may separate them. In this respect, 4 out of 5 users believe that “social media has made it easier for people to connect with each other” and that “social media has changed the world as we know it

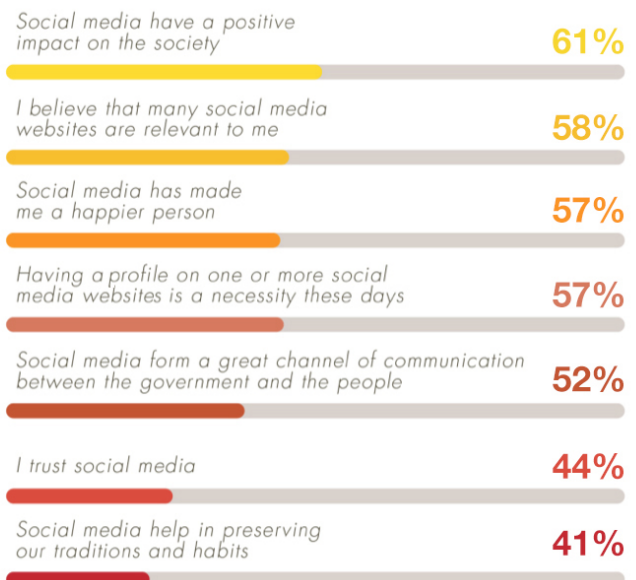
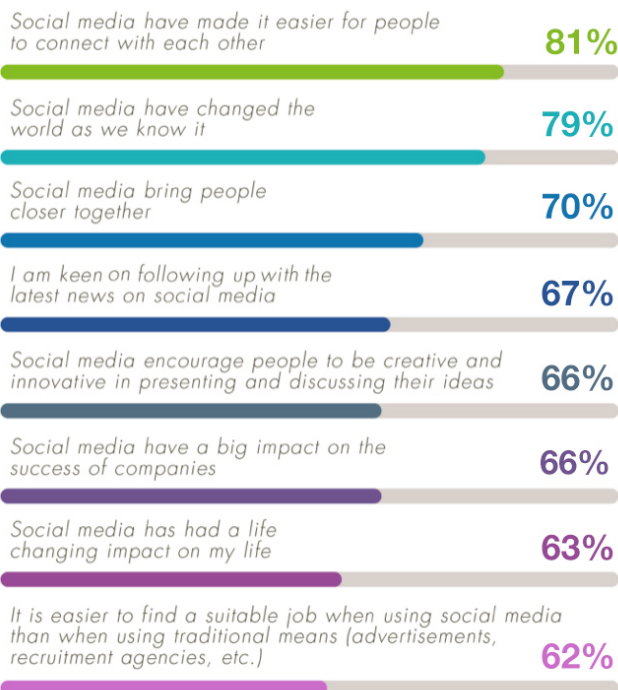
Social Media is perceived as a People Connection Facilitator



Connecting with People is the main reason for using Social Media



WhatsApp is the Top Preferred Social Media Channel in the Arab World

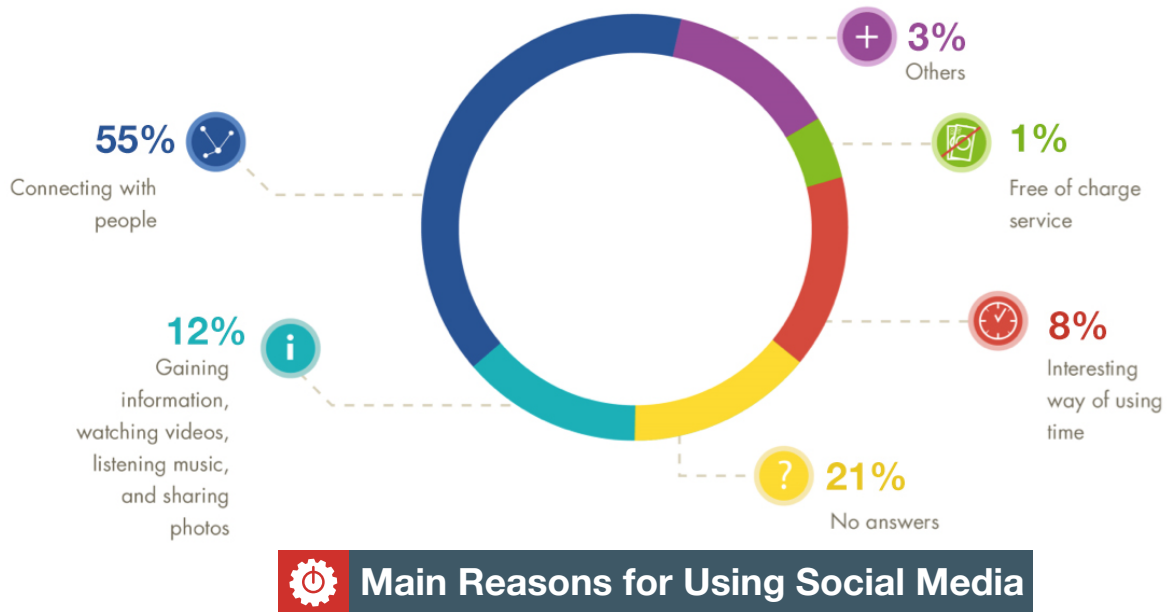


### Perceptions about Social Media

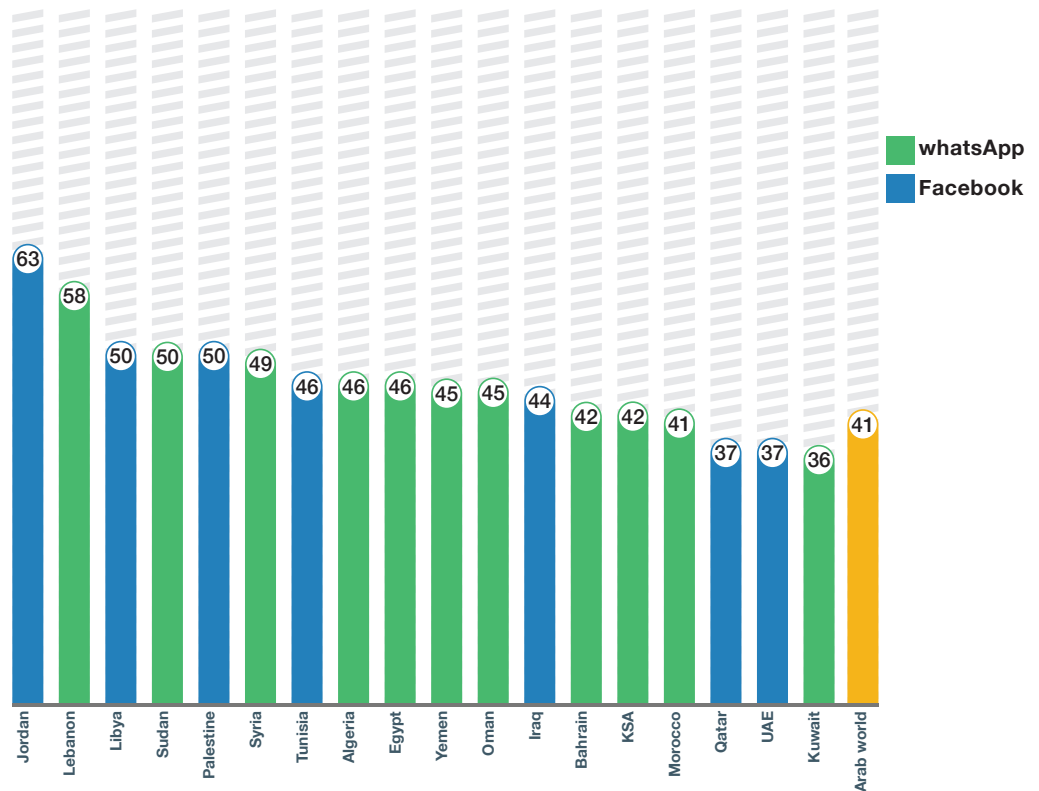
On the downside, only 2 out of 5 users reported that “social media help in preserving our traditions and habits” and that they “trust social media.

## 2- Usage and Access to Social Media

Connectivity is the main reason or motive for people to use social media in the first place (55%). It is followed by gaining information, watching videos, listening to music, and sharing photos, the second top main reason for using social media

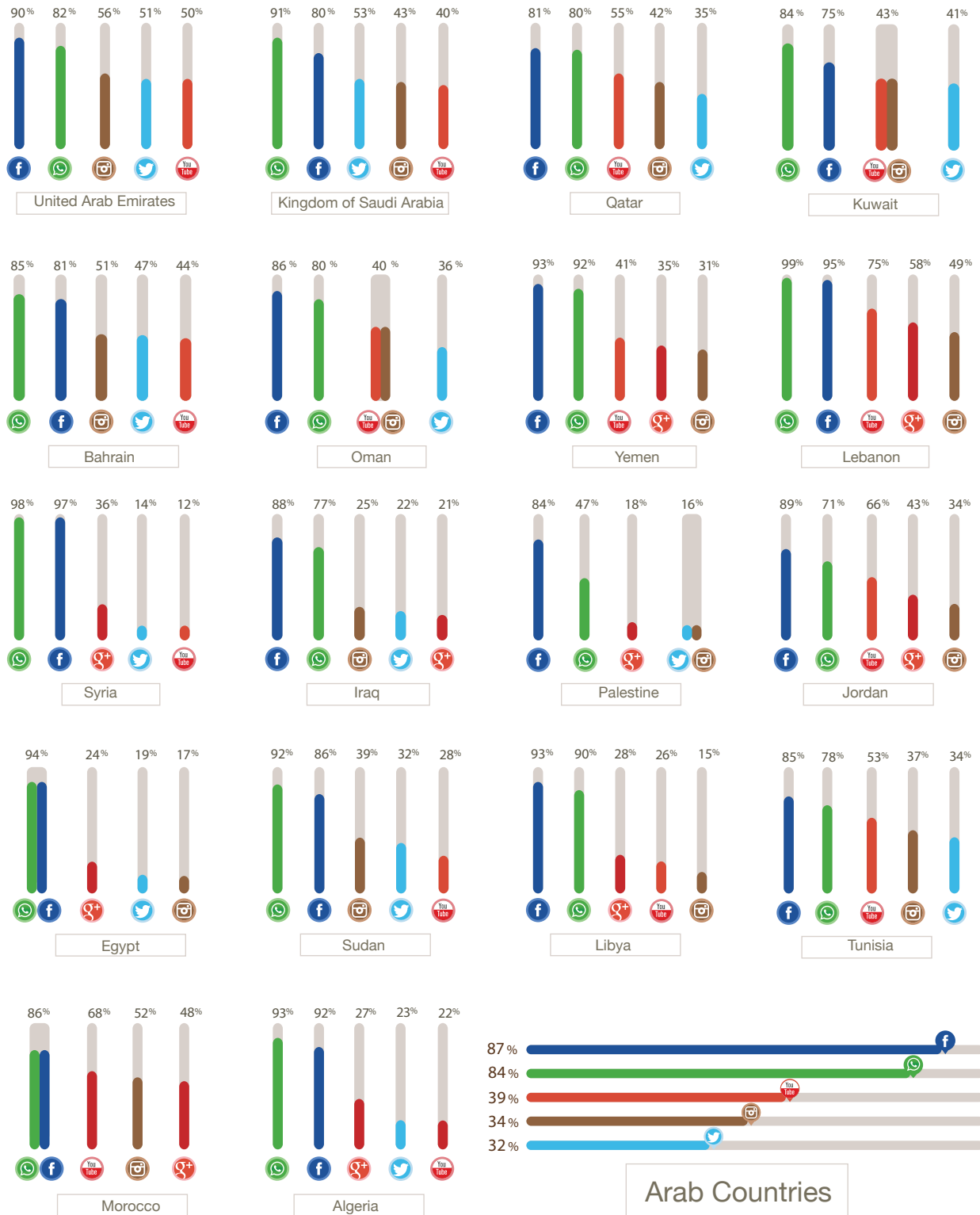


Perhaps not surprisingly, WhatsApp was the most preferred social media channel across the Arab World (41%). Facebook and WhatsApp swapped the top position for most preferred social media channel across the countries covered by the survey



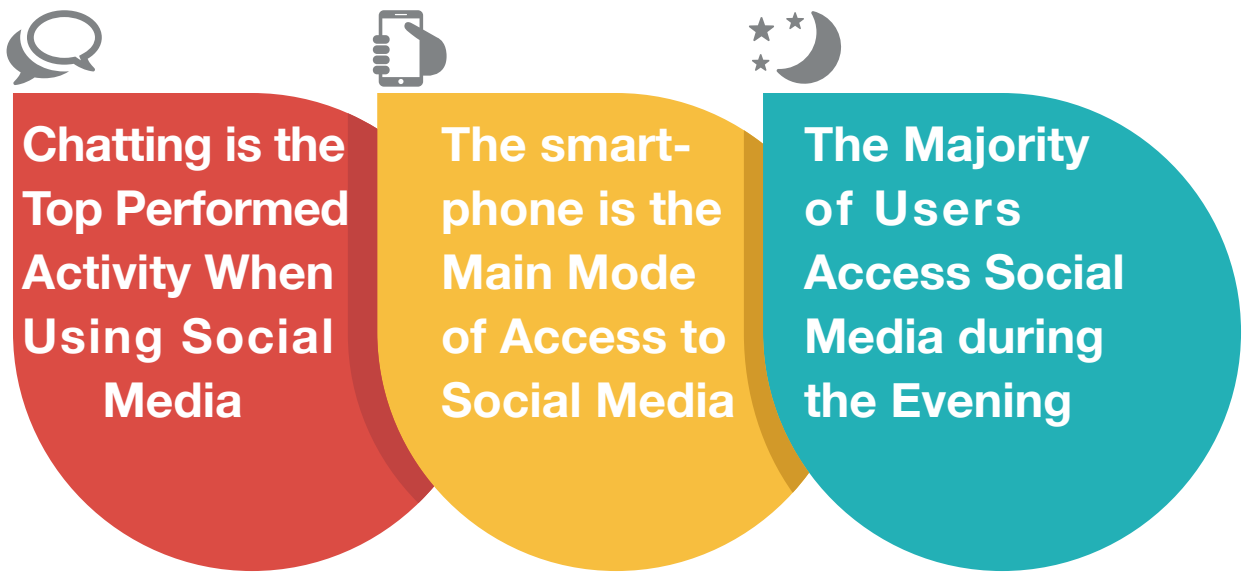
★ Most Preferred Social Media Channel per Country

Whatsapp and Facebook were also the top used social media channels among Arab countries, as Facebook was the top used social media channel in **10** Arab countries (UAE, Qatar, Oman, Jordan, Palestine, Iraq, Yemen, Libya, Egypt, and Morocco). On the other hand WhatsApp was the most used social media channel in the remaining countries (KSA, Kuwait, Bahrain, Syria, Lebanon, Sudan, Algeria, Egypt, and Morocco)<sup>3</sup>. Across the Arab World, Facebook was the most used social media channel followed by WhatsApp (**87%** and **84%**, respectively)

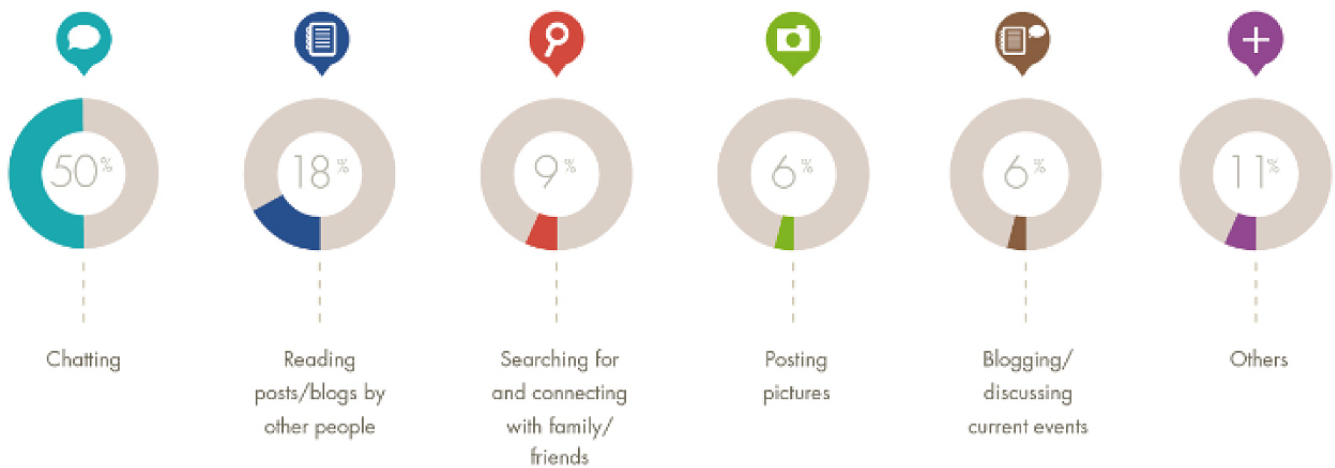


<sup>3</sup> The first place is shared between Facebook and WhatsApp as the most used social channel in both of Egypt and Morocco.



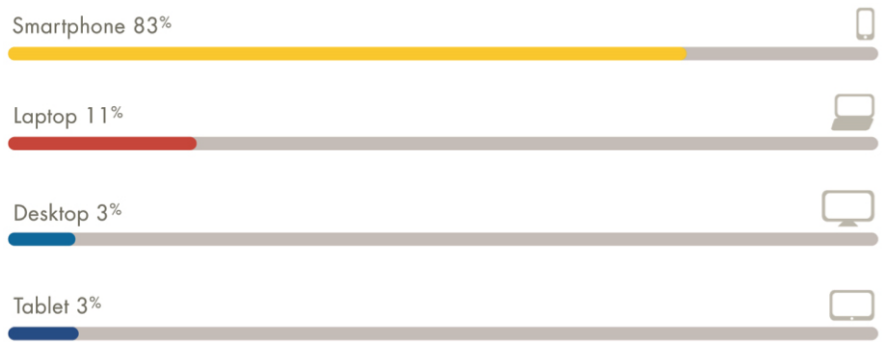


When asked about the types of activities they perform most of the time when using social media, (50%) of the sample stated that they use social media mainly for “chatting”. The second most common activity is “reading posts/blogs by other people” (18%)

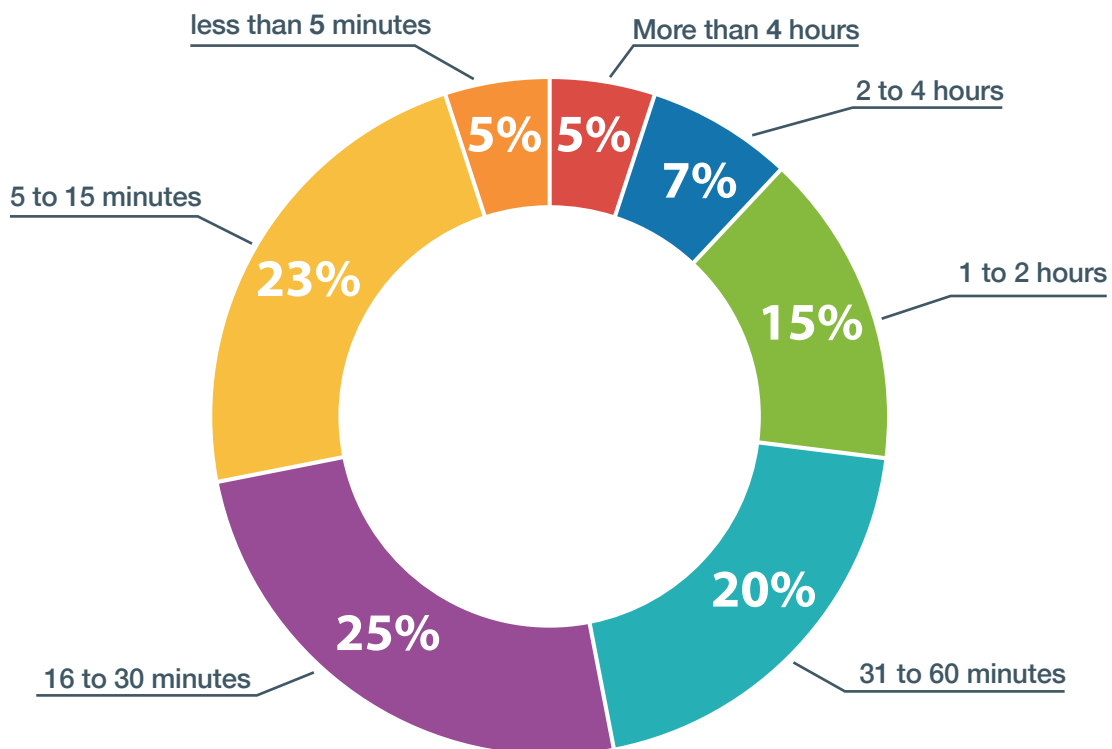


 Main Activities When Using Social Media

The majority of respondents (83%) access or use social media via their smartphones most of the time, compared to 11% who use their laptops most of the time to access/use social media



More than half the users (52%) are most active on social media during evening hours. Furthermore, one fourth of the users spend between 16-30 minutes per session when using social media, whereas around 12% spend more than 2 hours per session using social media

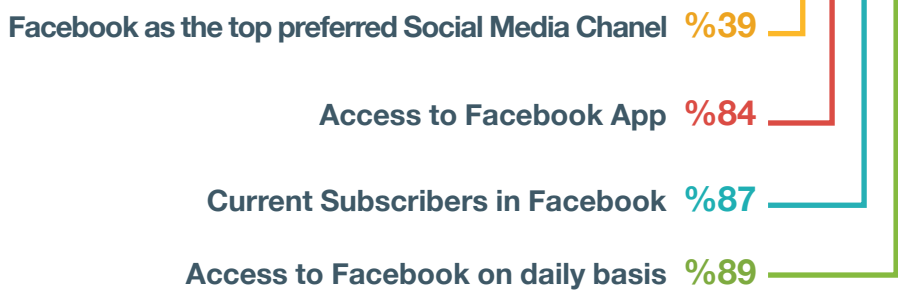


Average Length of Session When Using Social Media

**Note:**  
 Morning time: 6:00-11:59      Afternoon time: 12:00-17:59  
 Night time: 18:00-23:59      Night time: 0:00-5:59

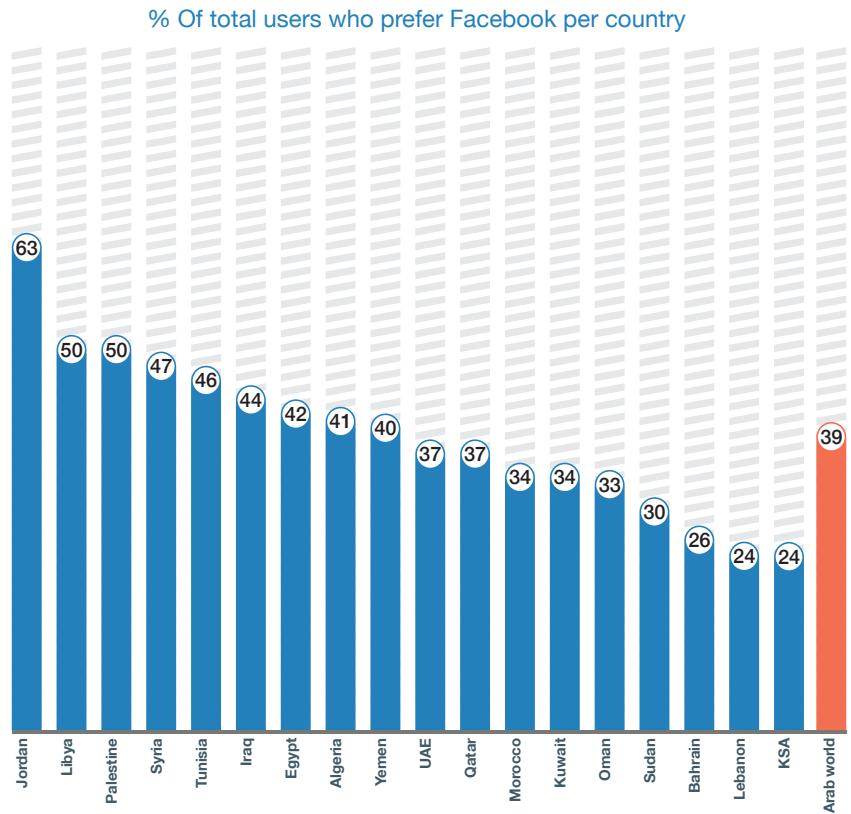


## **3- Facebook**



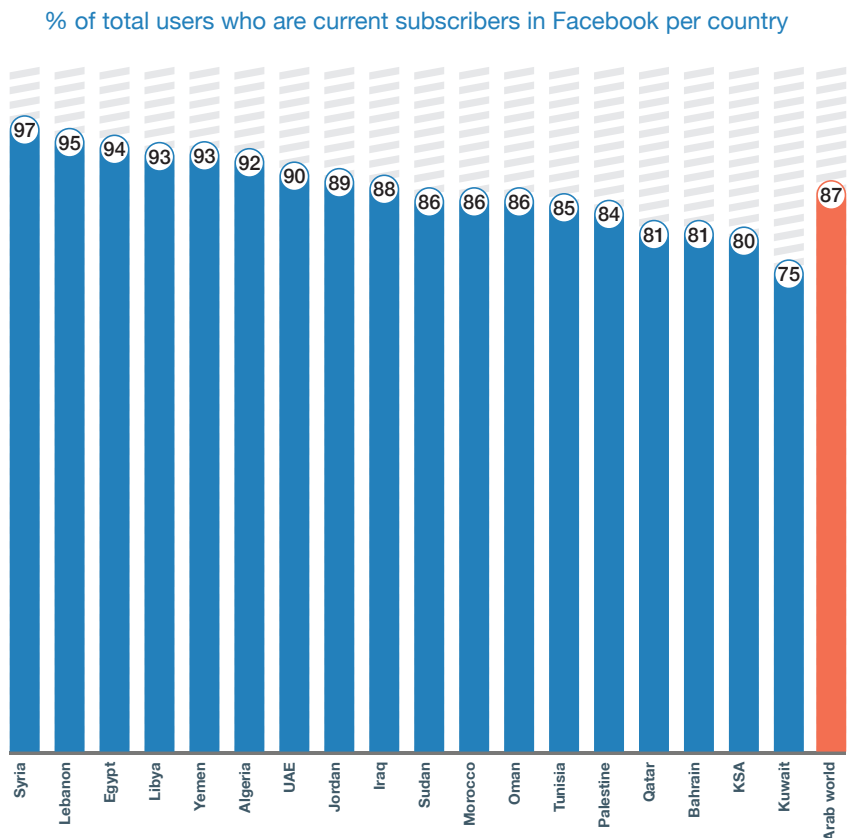
### Facebook as the Top Preferred Social Media Channel

Almost **2** out of **5** users in the Arab World stated that Facebook is the most preferred social media channel for them. Preference for Facebook was highest in Jordan (**63%**), Libya and Palestine (**50%** in each). On the other hand, Facebook was least selected as the most preferred in KSA and Lebanon (**24%** in each), followed by Bahrain (**26%**)



### Current Subscription to Facebook

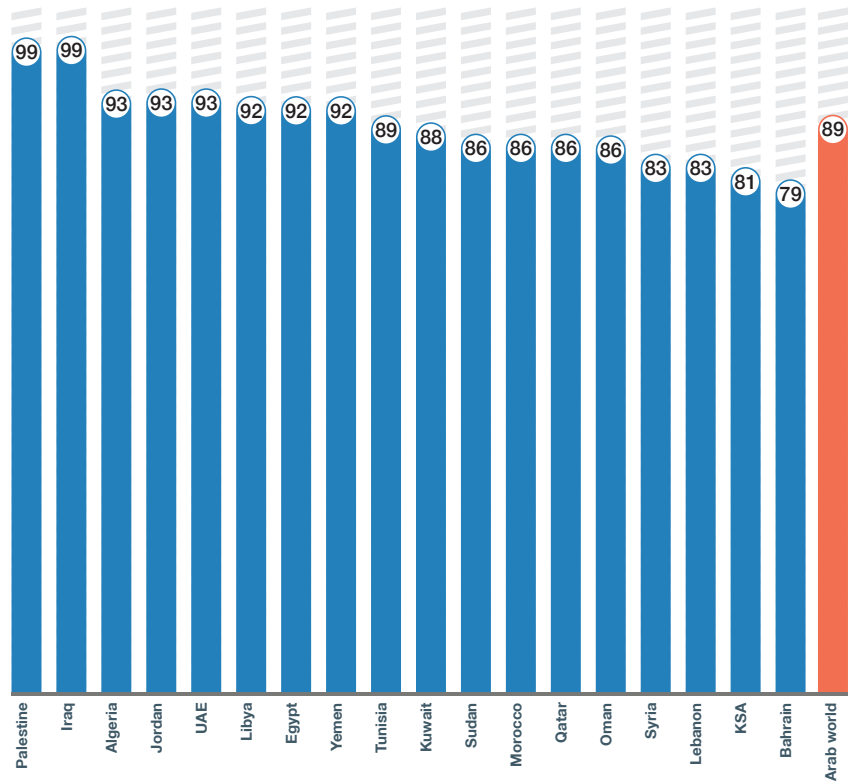
Around **87%** of all social media users covered by the survey are currently subscribed to Facebook. Current subscription rates for Facebook were fairly high across most of the countries covered in the survey, with the least rates recorded in Kuwait (**75%**), KSA (**80%**) and Bahrain and Qatar (**81%** in each)



### Daily Access to Facebook

The vast majority (**89%**) of current Facebook subscribers access the channel on daily basis. Daily access rates were highest in Palestine and Iraq (**99%** in each). And, they were the least in Bahrain and KSA (**79%** and **81%**, respectively)

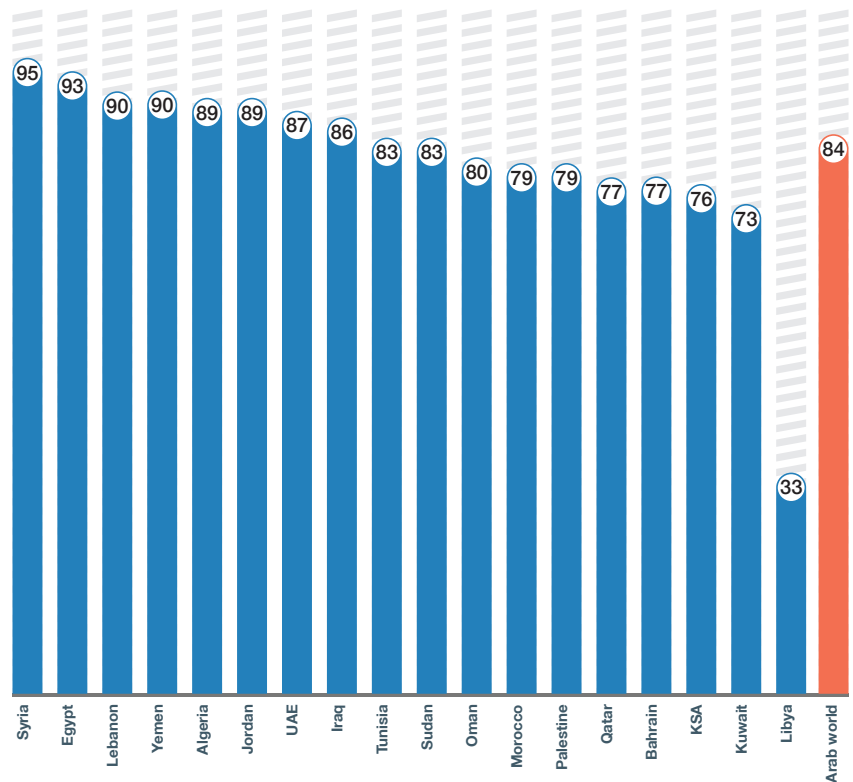
% of Facebook current subscribers who access it on daily basis per country



### Access to Facebook through Facebook App

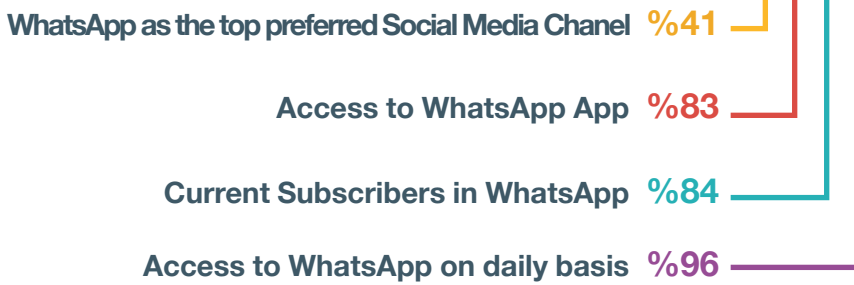
The majority (**84%**) of social media users in Arab World visit Facebook through their smartphones and/ or tablets. Facebook app usage was the highest in Syria (**95%**) followed by Egypt (**93%**). While Facebook app usage was the least in Kuwait comparing to other Arab countries, as only (**33%**) of total users access Facebook app

% of total users who visit Facebook through their smartphones and/or tablets





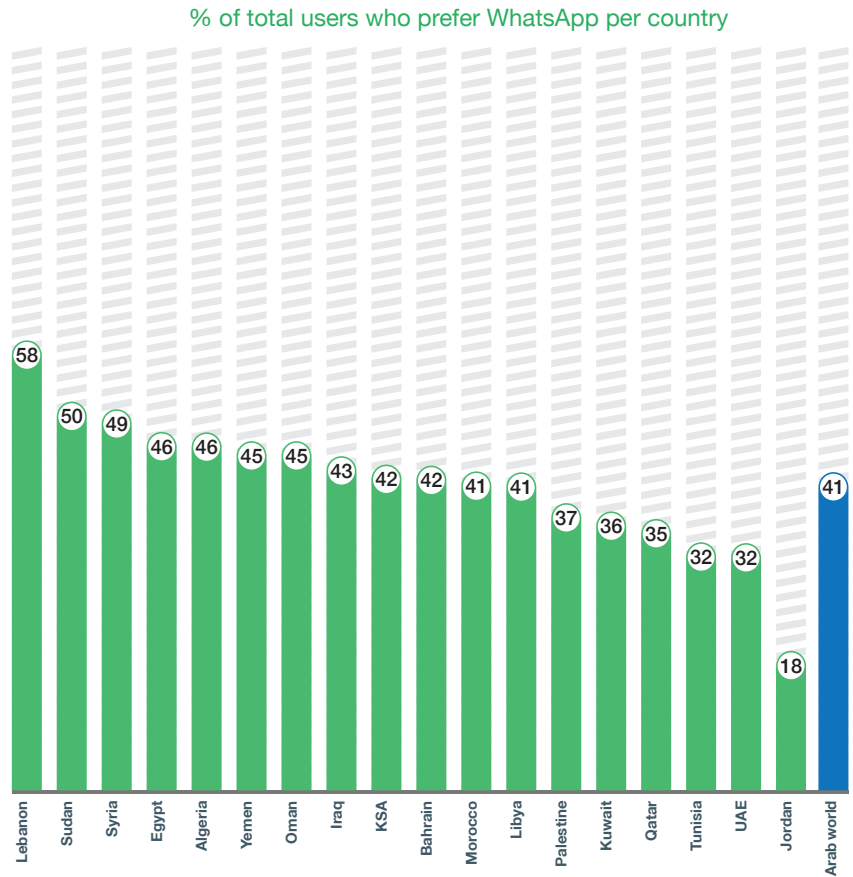
## 4- WhatsApp





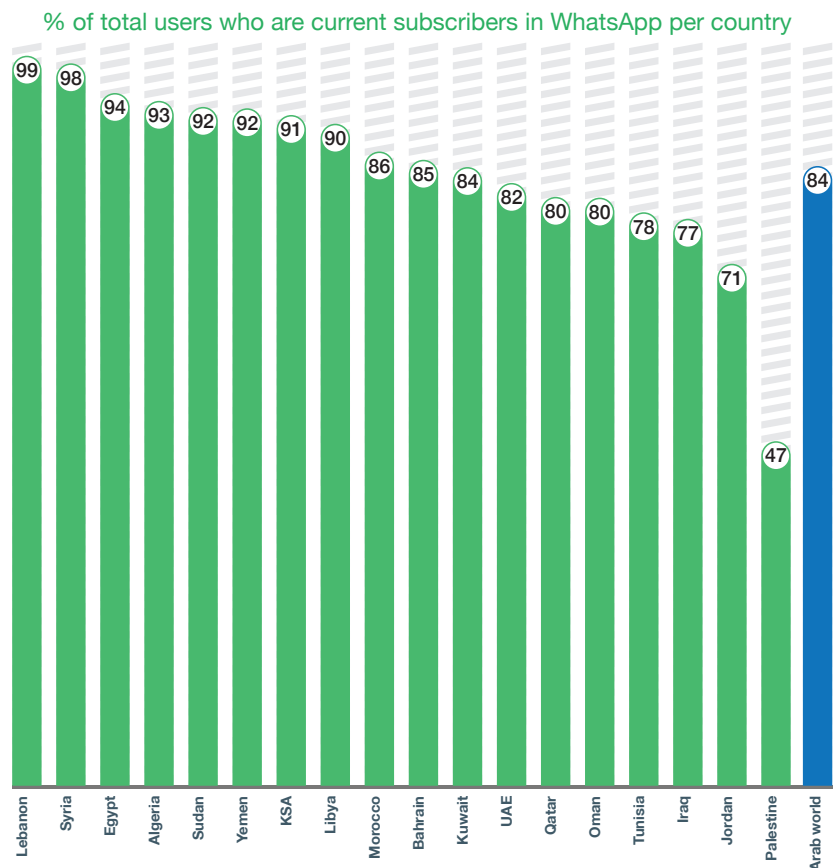
### WhatsApp as the Top Preferred Social Media Channel

Almost **2** out of **5** users in the Arab World consider WhatsApp their most preferred social media channel. Preference for WhatsApp was highest in Lebanon and Sudan (**58%** and **50%**, respectively). While the users in Jordan (**18%**) were the least comparing to other countries prefer WhatsApp



### Current Subscription to WhatsApp

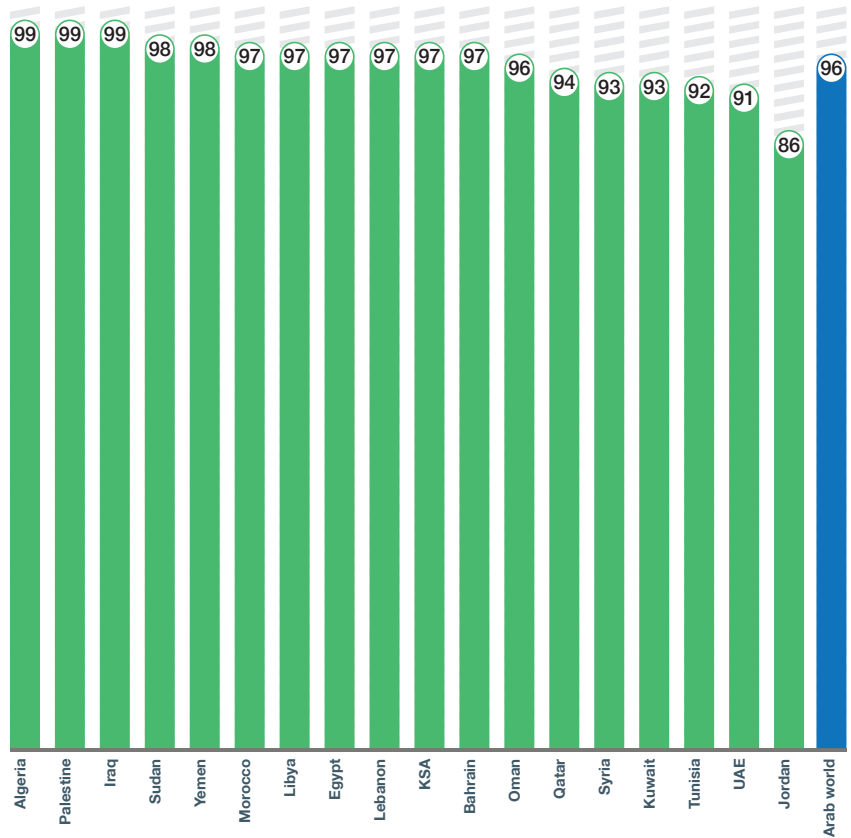
Around (**84%**) of social media users covered by the survey are current subscribers to WhatsApp. Across most of the countries, the current subscription rates for WhatsApp were fairly high. Almost all of social media users in Lebanon and Syria are current subscribers to WhatsApp (**99%** and **98%**, respectively). While the users in Palestine (**47%**) are the least users who have current WhatsApp subscription



### Daily Access to WhatsApp

Most of WhatsApp current subscribers (96%) access the channel on daily basis. Daily access rates were highest in Algeria, Palestine and Iraq (99% in each). While the rate in Jordan was the least although it is still high (86%)

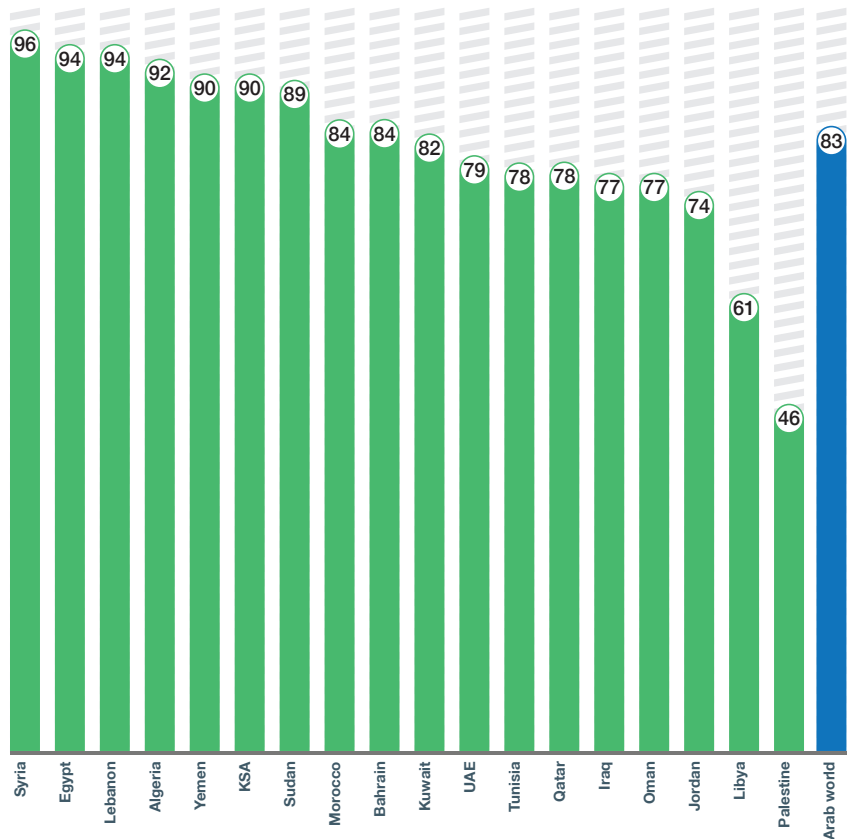
% of WhatsApp current subscribers who access it on daily basis per country



### Access to WhatsApp through its App

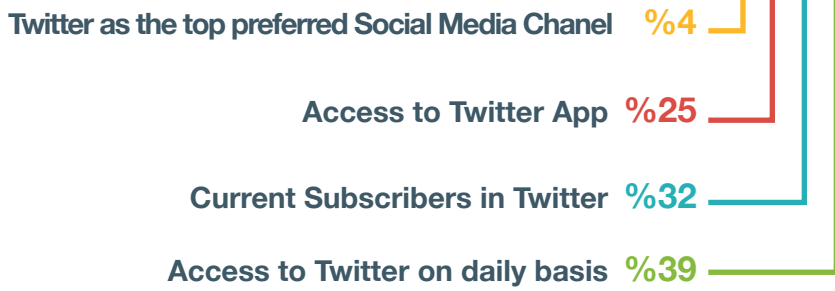
More than 4 in 5 social media users in Arab World visit WhatsApp through their smartphones and/ or tablets. WhatsApp app usage was the highest in Syria (96%) followed by Egypt (94%). While it was the least in Palestine and Libya comparing to other Arab countries (46% and 61%, respectively)

% of total users who visit WhatsApp through their smartphones and/or tablets



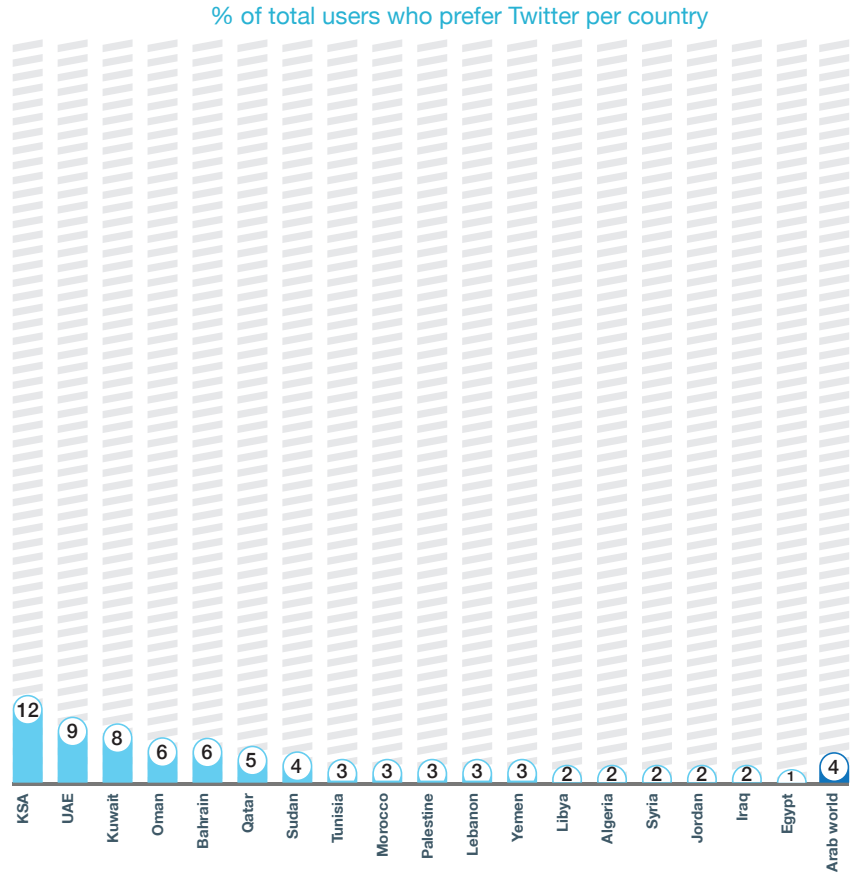


## 5- Twitter



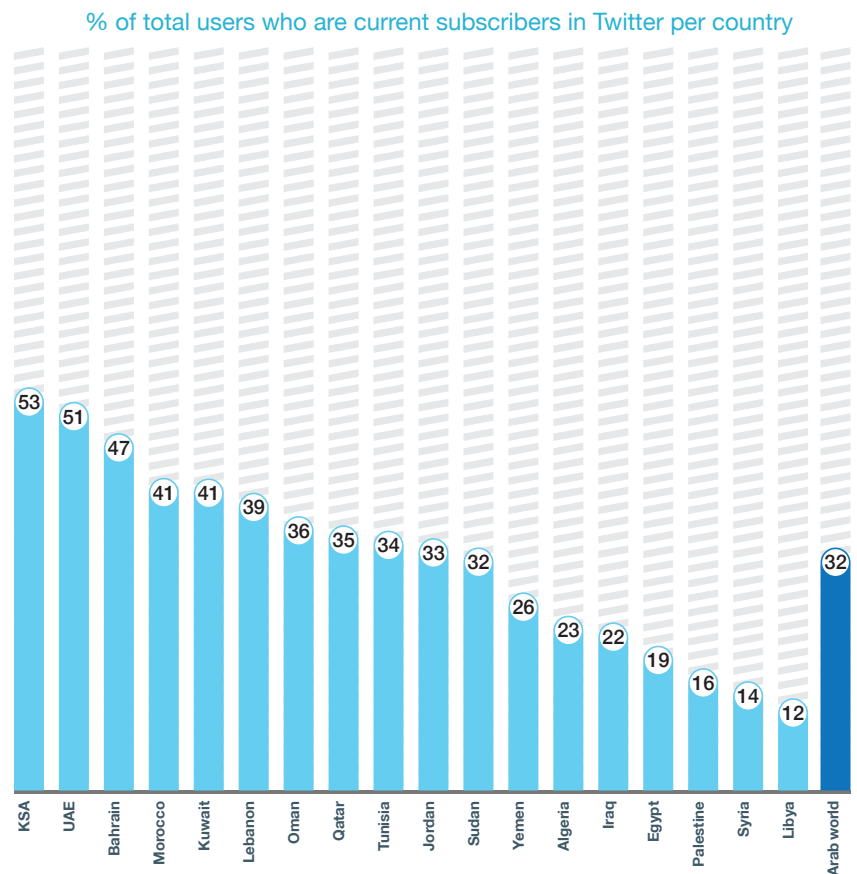
### Twitter as the Top Preferred Social Media Channel

The preference for Twitter was low for users covered by the survey, as only (4%) of total users prefer Twitter. KSA and UAE have the highest preference (12% and 9%, respectively); while it was the least in Egypt with only (1%) of all users prefer it



### Current Subscription to Twitter

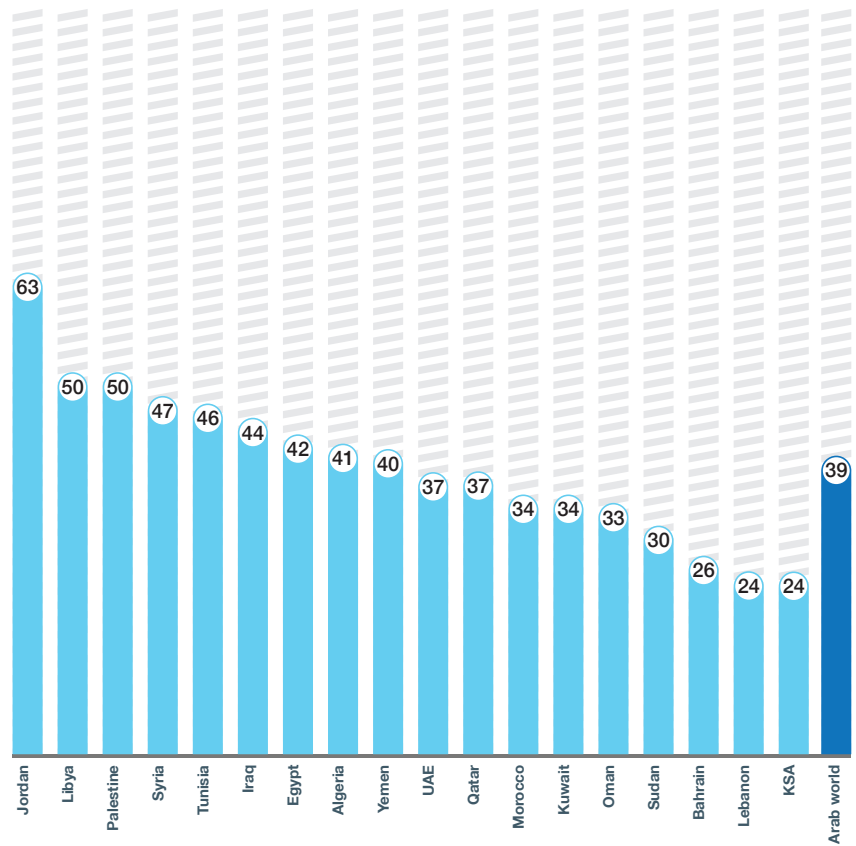
Around one third (32%) of social media users covered by the survey have current subscription in Twitter. The current subscription rates for Twitter were the highest in KSA and UAE (53% and 51%, respectively). On the other hand these rates was the least in Libya and Syria (12% and 14%, respectively)



### Daily Access to Twitter

Almost **2** out of **5** users in the Arab World (**39%**) consider Twitter their most preferred social media channel. Preference for Twitter was highest in Jordan and Libya (**63%** and **50%**, respectively). While the users in Lebanon and KSA (**24%** each) were the least comparing to other countries prefer twitter

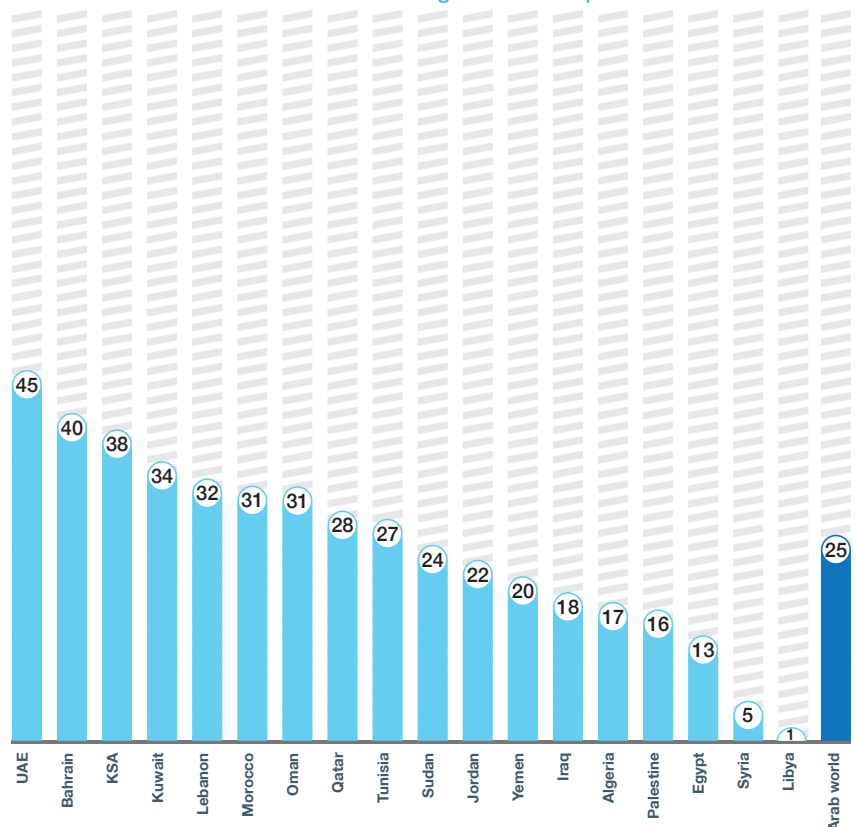
% of Twitter current subscribers who access it on daily basis per country



### Access to Twitter through Twitter App

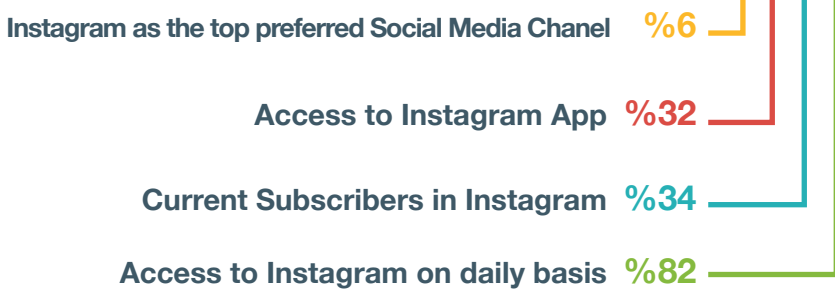
Around one quarter of social media users in Arab World visit Twitter through their smartphones and or tablets. Twitter app usage was the highest in UAE and Bahrain (**45%** and **40%**, respectively). On the other hand it is at least usage in Libya and Syria (**1%** and **5%**, respectively)

% of total users who visit Twitter through their smartphones and/or tablets





## 6- Instagram



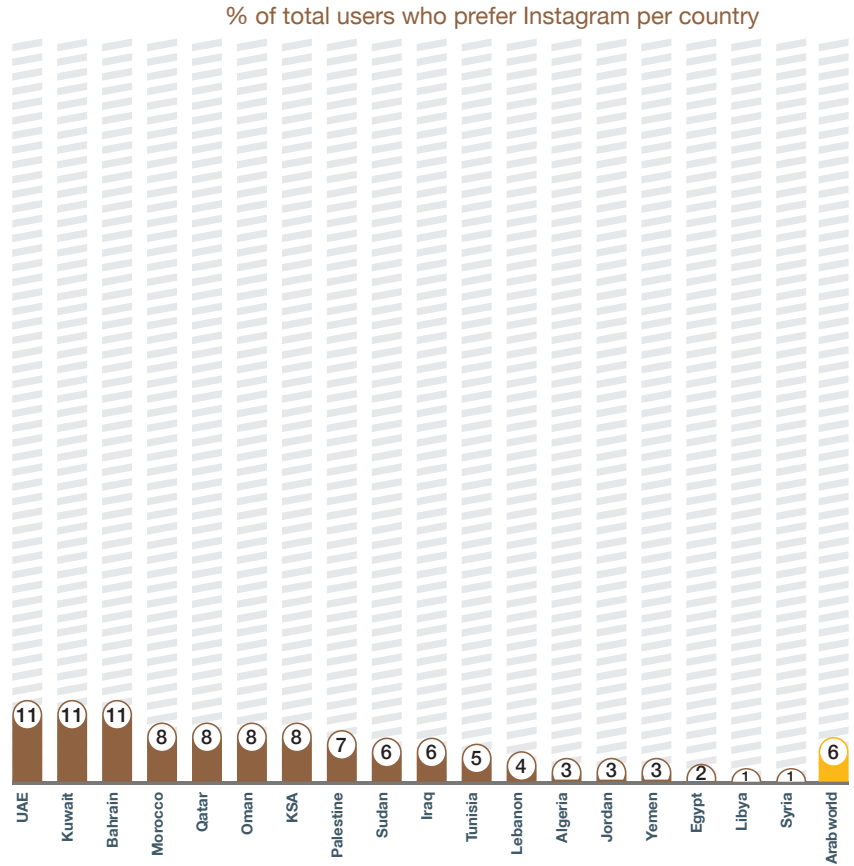
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 **Instagram Statistics for the Arab World**



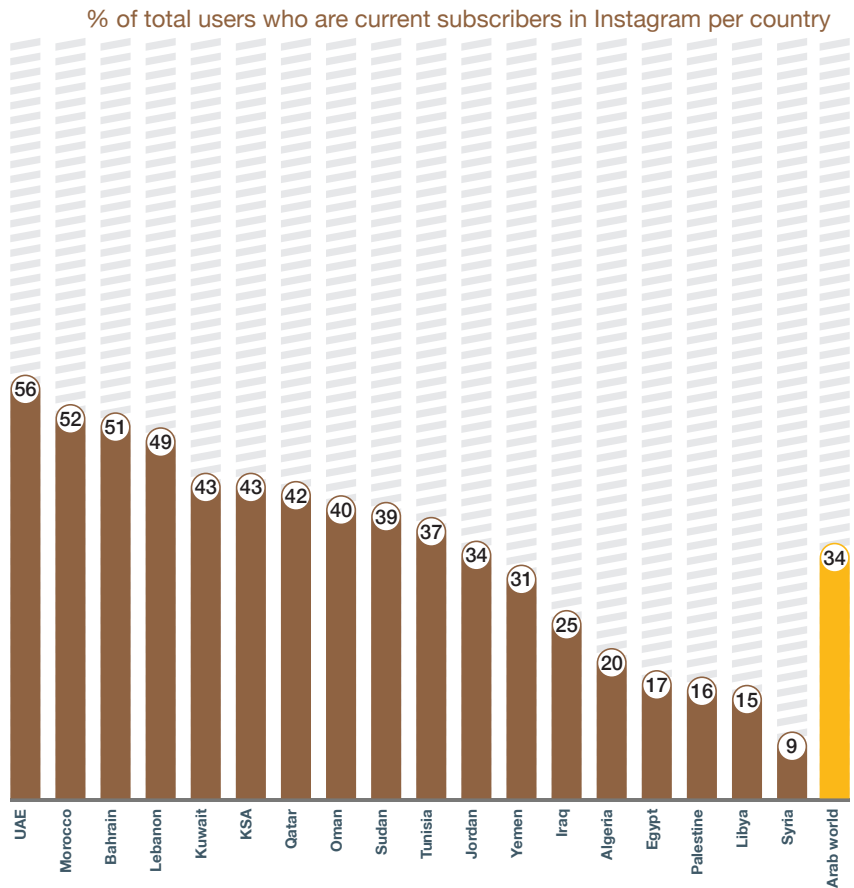
### Instagram as the Top Preferred Social Media Channel

The preference for Instagram was low for users covered by the survey, as only (6%) of total users prefer it. The highest preference rates were in UAE, Kuwait, and Bahrain (11% in each). On the other hand the users in Syria and Libya were the least with only (1%) of total users preferring it



### Current Subscription to Instagram

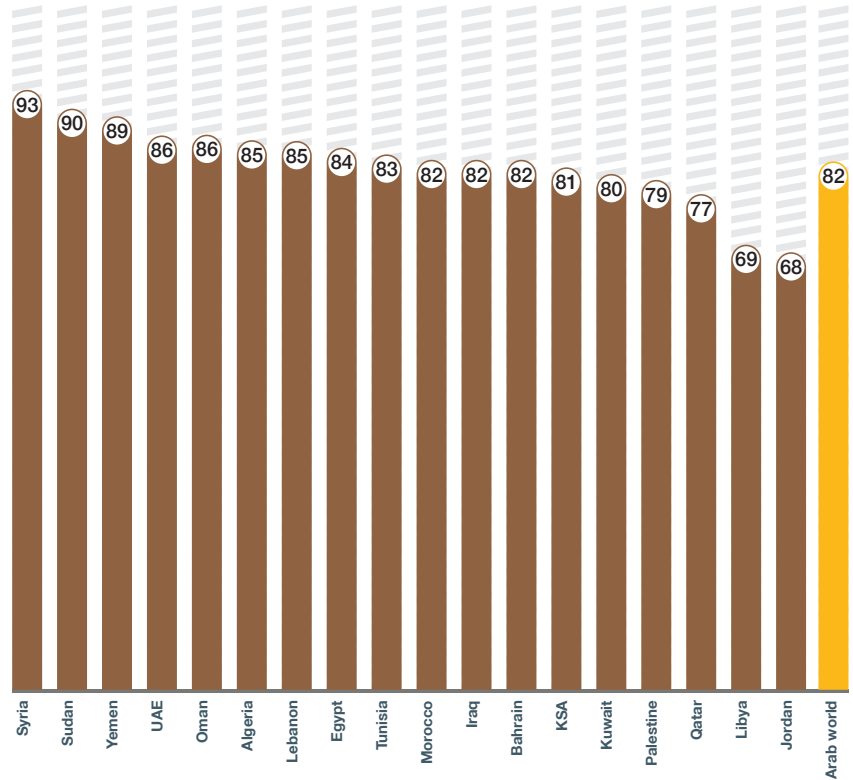
Almost one third (34%) of social media users in Arab world have current subscription in Instagram. UAE social media users are the most users with the highest current subscription (56%) followed by Morocco (52%). While Syria has the least current subscription rates (9%)



### Daily Access to Instagram

Around **4 in 5** social media users in Arab world access Instagram on daily basis. Daily access to Instagram was at highest rates in Syria and Sudan (**93%** and **90%**, respectively). While the users in Jordan and Libya had the least access rates on daily basis (**68%** and **69%**, respectively)

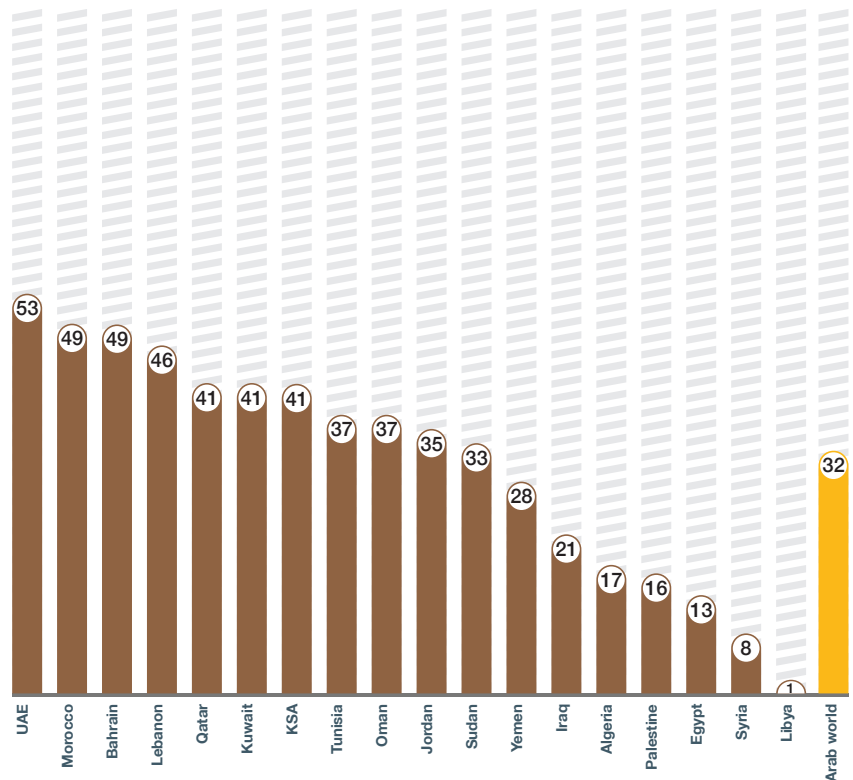
% of Instagram current subscribers who access it on daily basis per country



### Access to Instagram through Instagram App

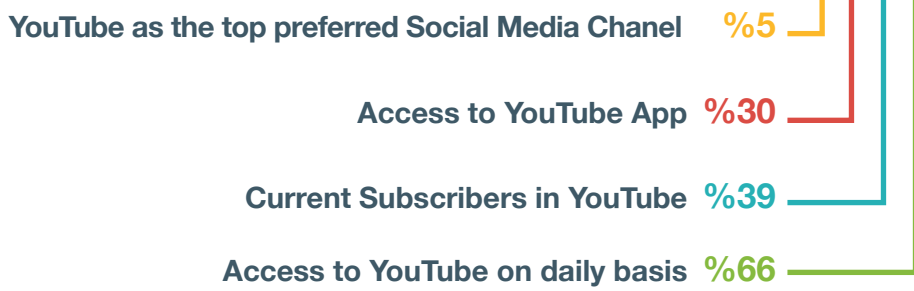
Around one third of total Instagram users in Arab world access Instagram through its app. Users in UAE scored the highest rate for access Instagram via their smartphones and tablets (**53%**). On the other hand it is at least usage in Libya and Syria (**1%** and **8%**, respectively)

% of total users who visit Instagram through their smartphones and/or tablets



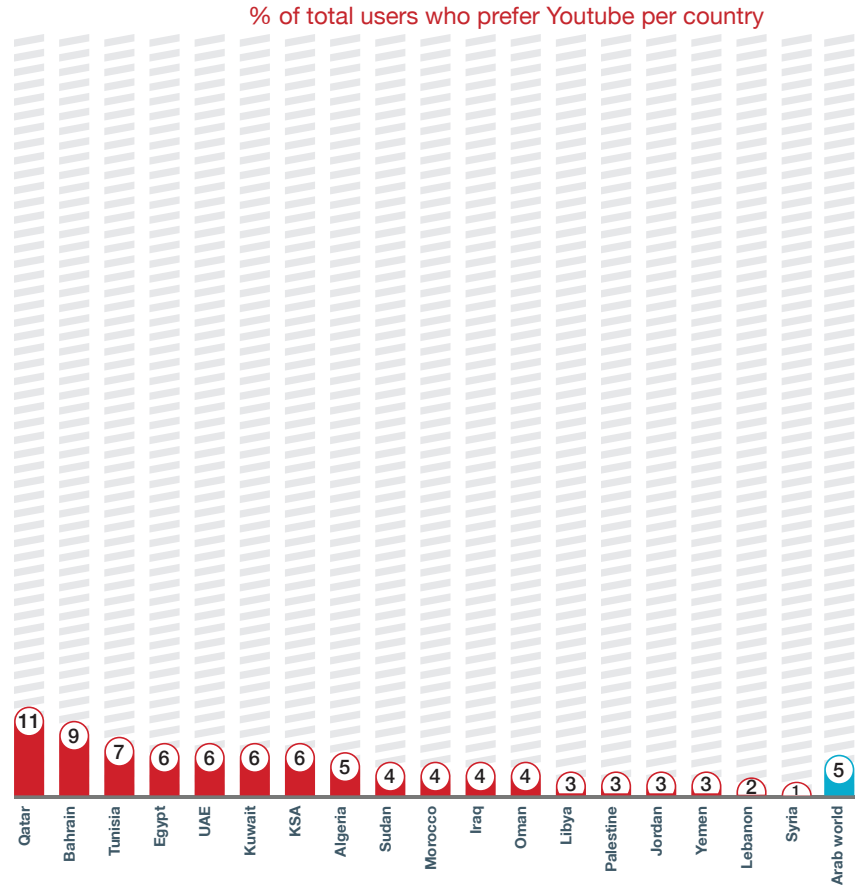


## 7- Youtube



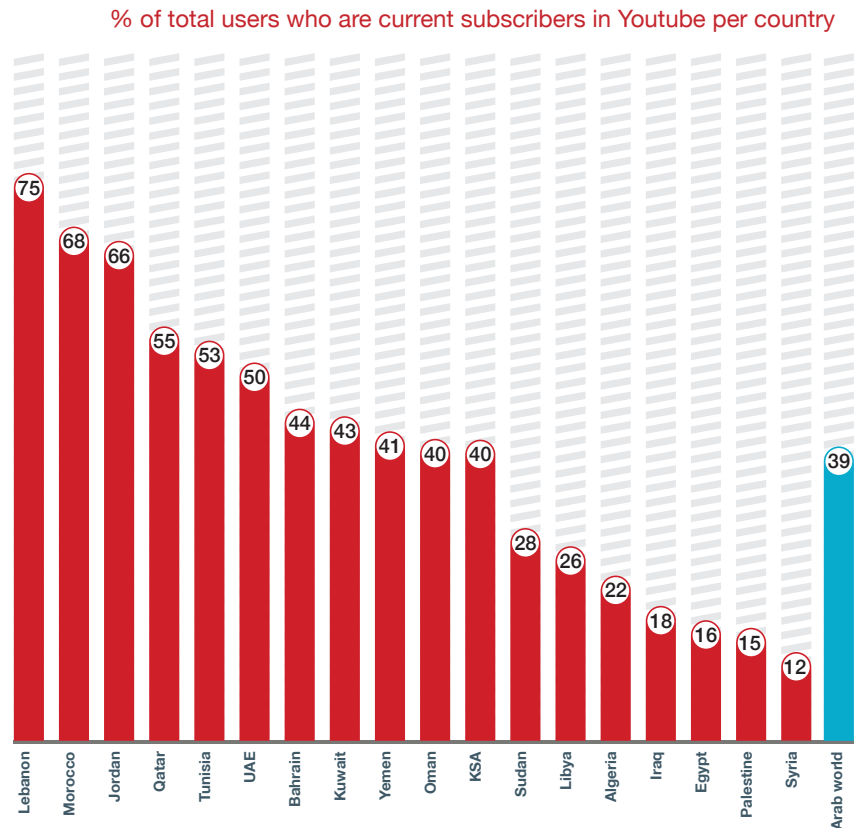
### Youtube as the Top Preferred Social Media Channel

The preference for YouTube reflected with low rates for users covered by the survey, as only (5%) of total users prefer it. The highest preference rates were in Qatar and Bahrain (11% and 9%, respectively). On the other hand the no users in Syria consider YouTube as their most preferred channel



### Current Subscription to Youtube

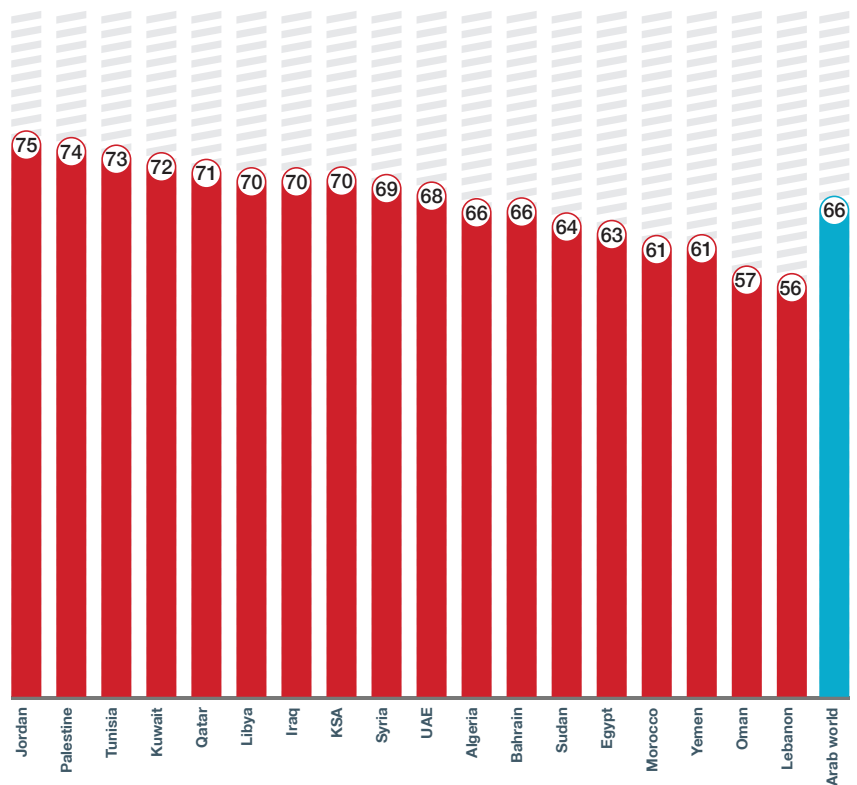
Around 2 in 5 users of social media users in Arab world are current subscribers in YouTube. Lebanon and Morocco had the highest current subscription rates (75% and 68%, respectively). On the other hand the least rates were in Syria and Palestine (12% and 15%, respectively)



### Daily Access to Youtube

Around two thirds (**66%**) of social media users in Arab world access YouTube on daily basis. The highest percentages of current subscribers who access this channel on daily basis were in Jordan followed by Palestine (**75%** and **74%**, respectively). While the users in Lebanon had the least daily access rate (**56%**)

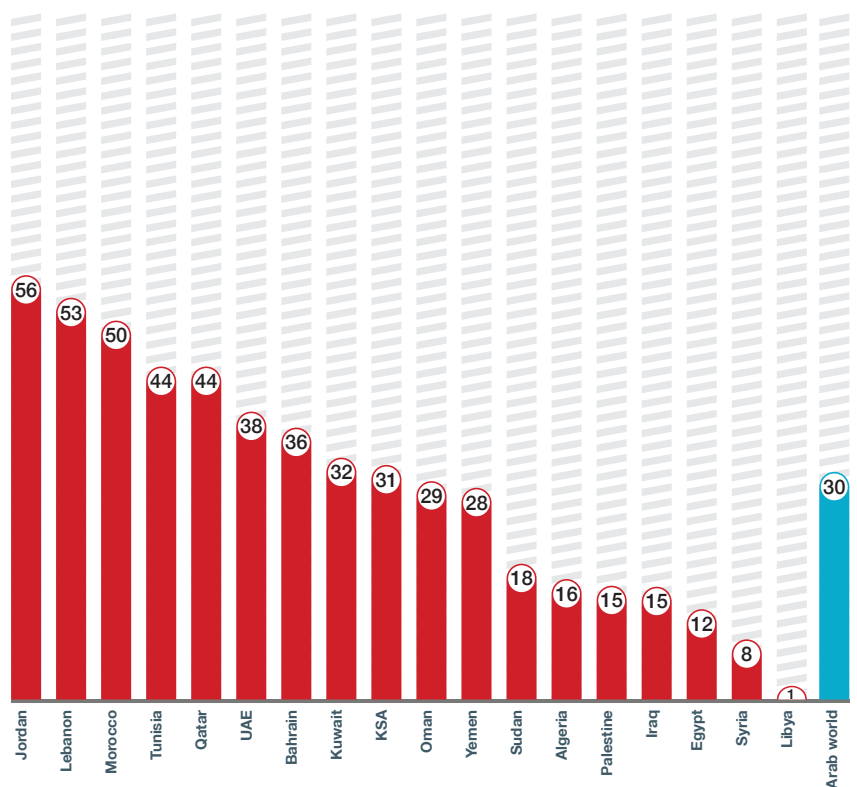
% of Youtube current subscribers who access it on daily basis per country



### Access to Youtube through Youtube App

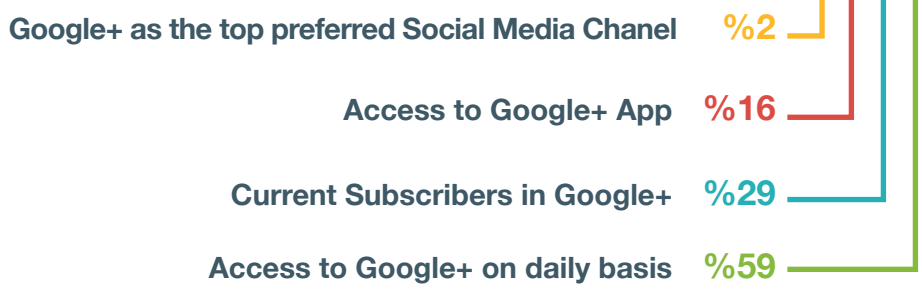
Around one third (**30%**) of total YouTube users covered by the survey access YouTube through its app. Users in Jordan and Lebanon had the highest rate for accessing YouTube via their smartphones and/or tablets (**56%** and **53%**, respectively). On the other hand Libya had the least rate as only (**1%**) of total users access YouTube app

% of total users who visit Youtube through their smartphones and/or tablets





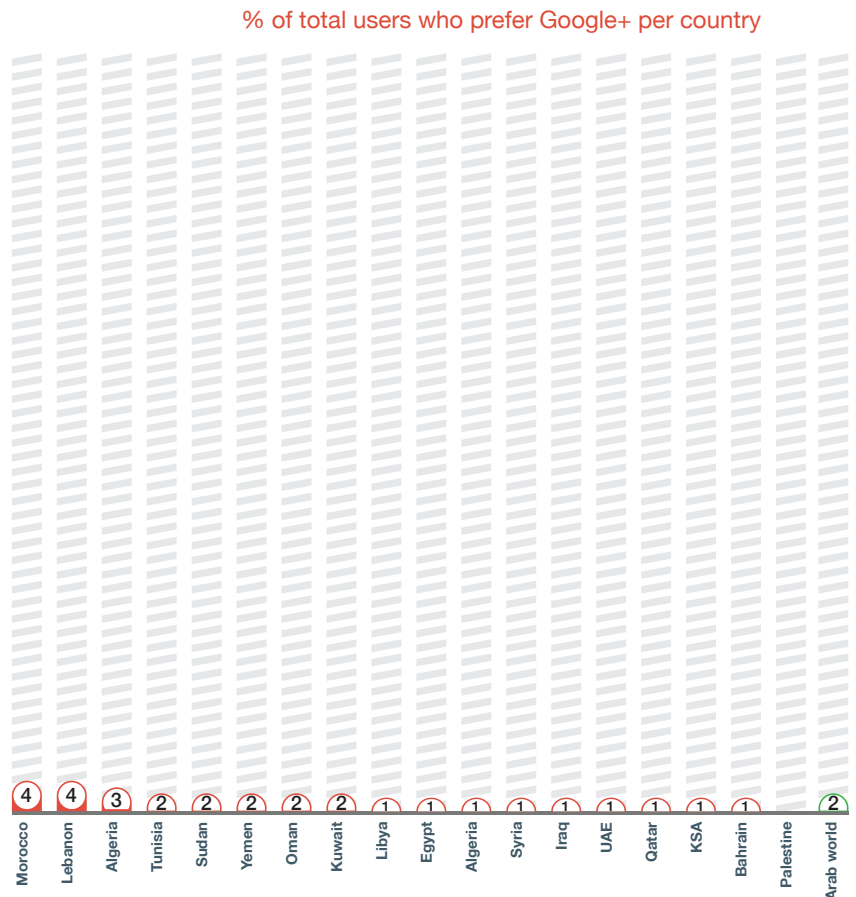
## 8- Google+





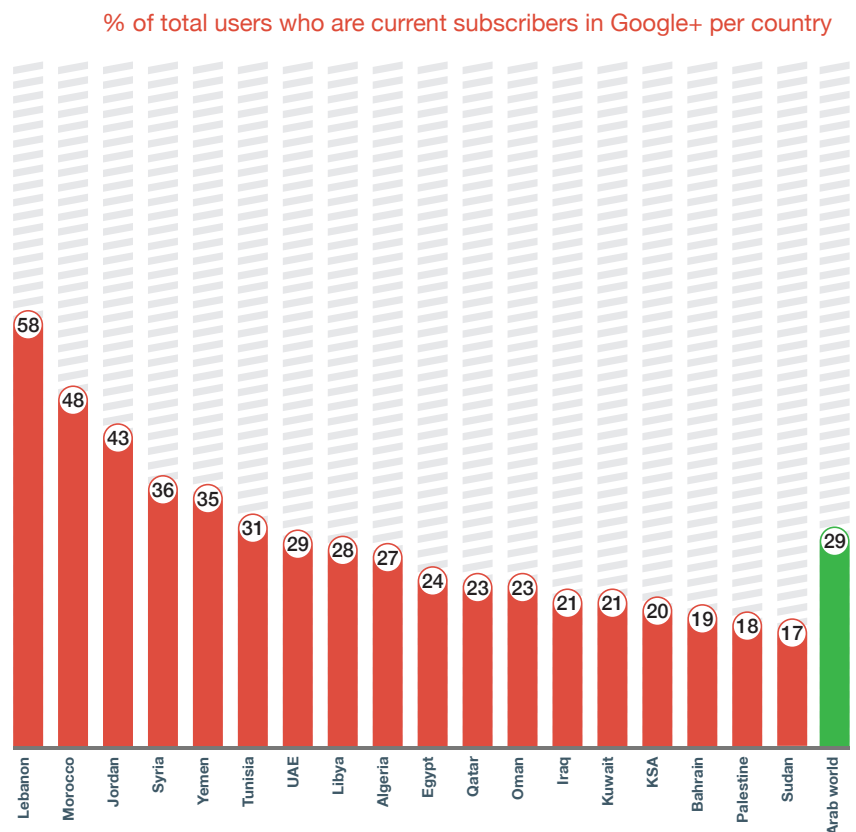
### Google+ as the Top Preferred Social Media Channel

The preference for Google+ is very low for the users covered by the survey, as only (2%) of total users prefer it. The highest preference rates were in Morocco and Lebanon (4% in each). While in Palestinian social media users don't consider Google+ as their most preferred social media channel



### Current Subscription to Google+

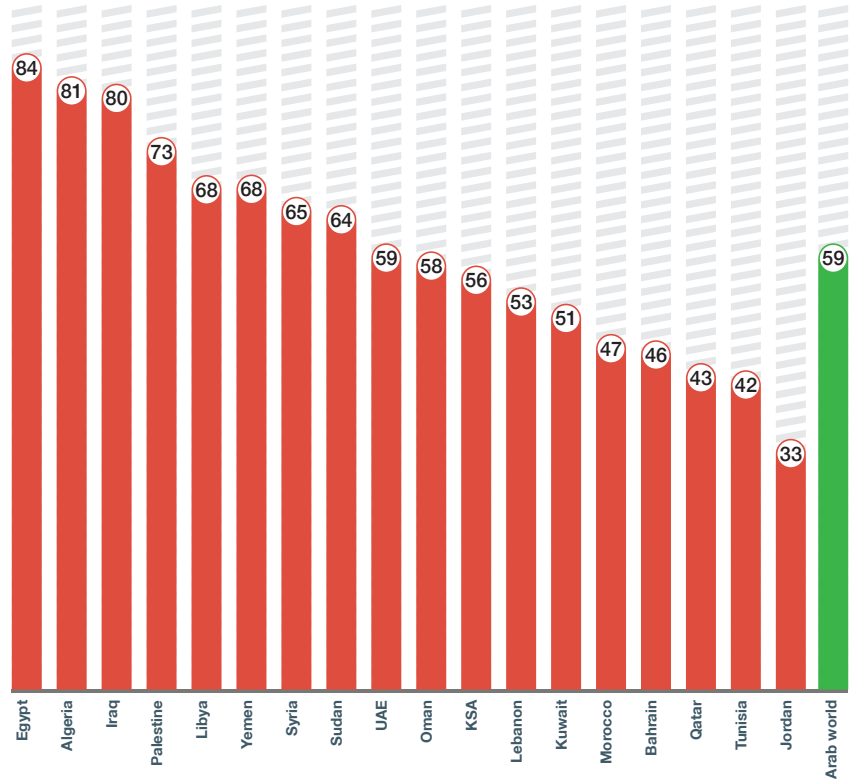
Around (29%) of social media users in Arab world are current subscribers in Google+. Lebanon and Morocco had the highest current subscription rates (58% and 48%, respectively). While the least rates were for Sudan and Palestine (17% and 18%, respectively)



### Daily Access to Google+

Around **3** in **5** users in Arab world access Google+ on daily basis. The highest percentages of current subscribers who access this channel on daily basis were in Egypt followed by Algeria (**84%** and **81%**, respectively). While the users in Jordan had the least percentage (**33%**)

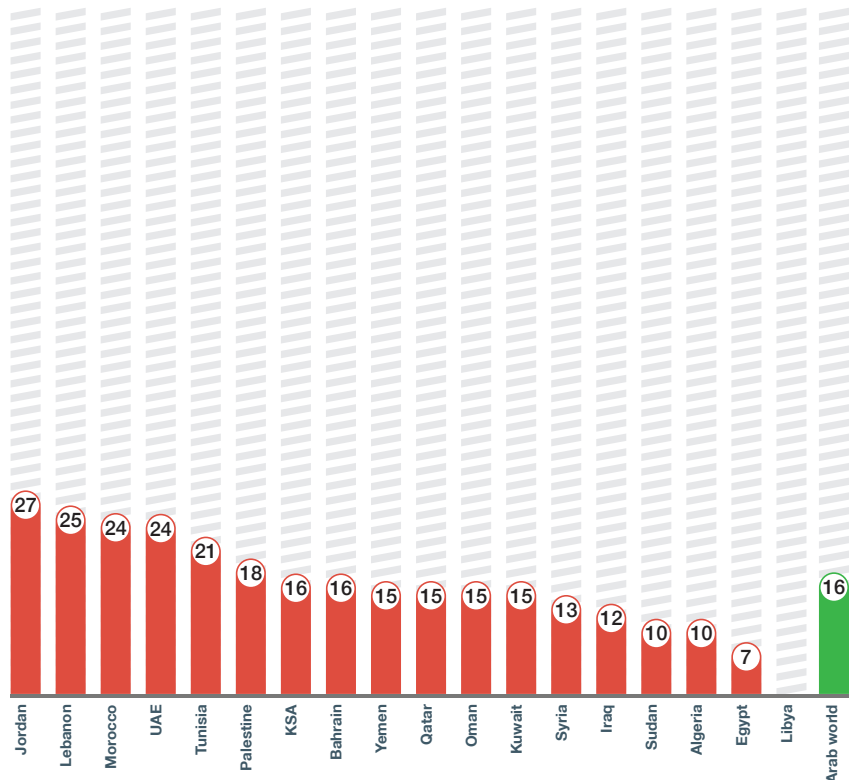
% of Google+ current subscribers who access it on daily basis per country



### Access to Google+ through Google+ App

Around (**16%**) of total Google+ users covered by the survey access Google+ through its app. Users in Jordan and Lebanon had the highest rate for accessing it via their smartphones and/or tablets (**27%** and **25%**, respectively). On the other hand there are no users for the Google+ app in Libya

% of total users who visit Google+ through their smartphones and/or tablets



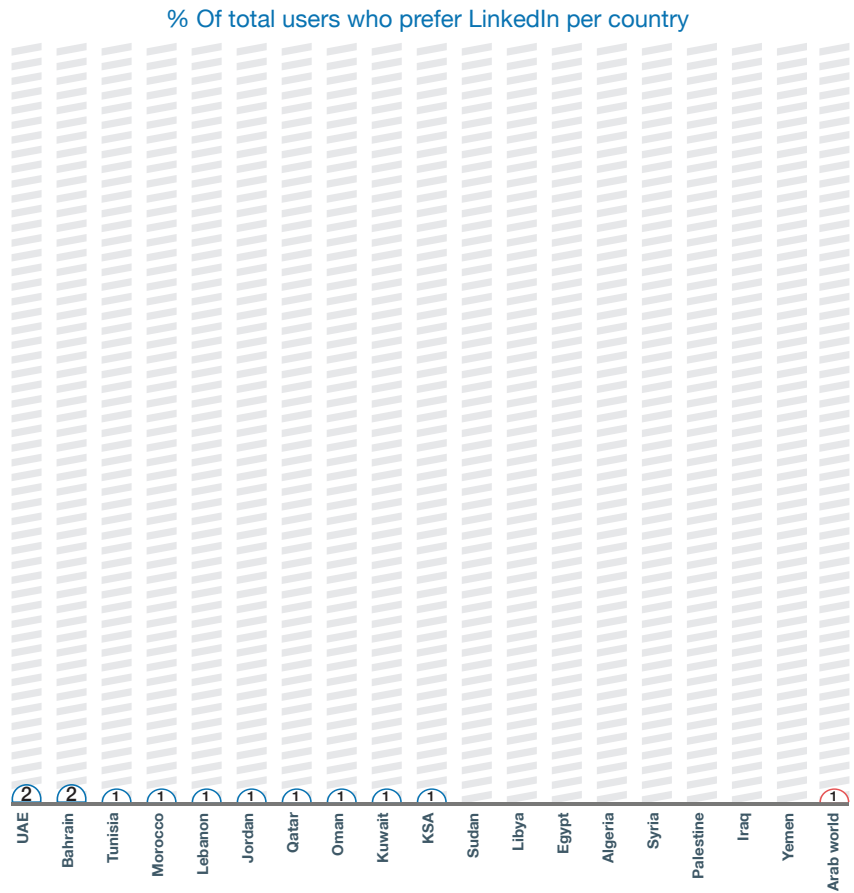


## 9- LinkedIn



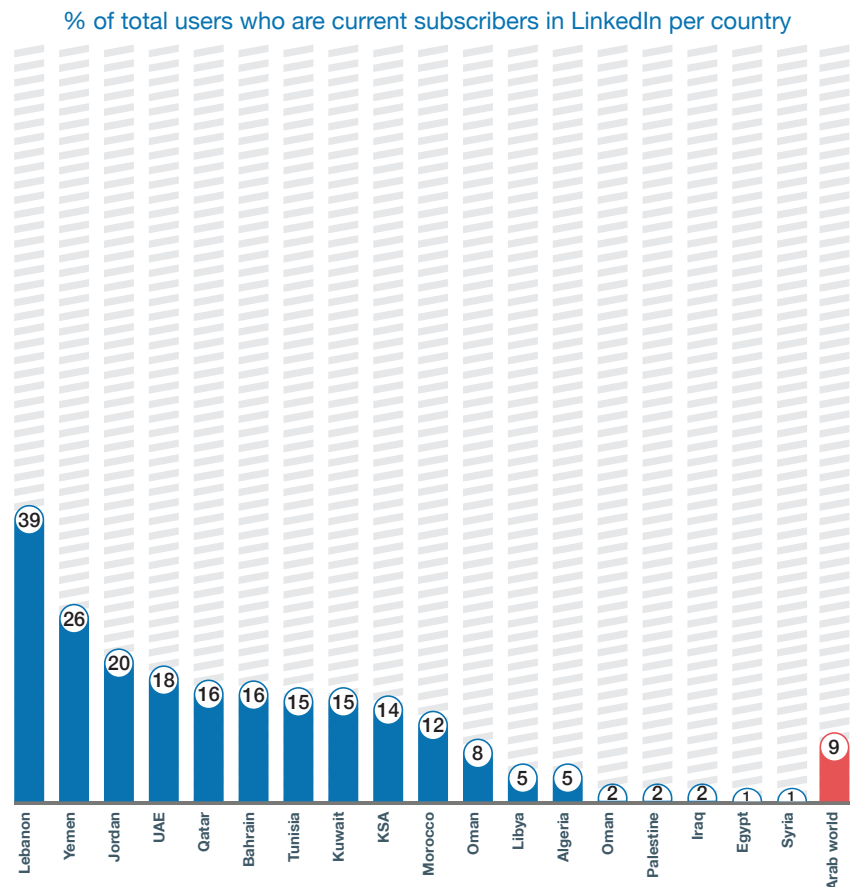
### LinkedIn as the Top Preferred Social Media Channel

The preference for LinkedIn is very low for the users covered by the survey, as only (1%) of total users prefer it. The highest preference rates were in UAE and Bahrain (2% in each). While no users consider it as their most preferred social media channel in Sudan, Libya, Egypt, Algeria, Syria, Palestine, Iraq and Yemen



### Current Subscription to LinkedIn

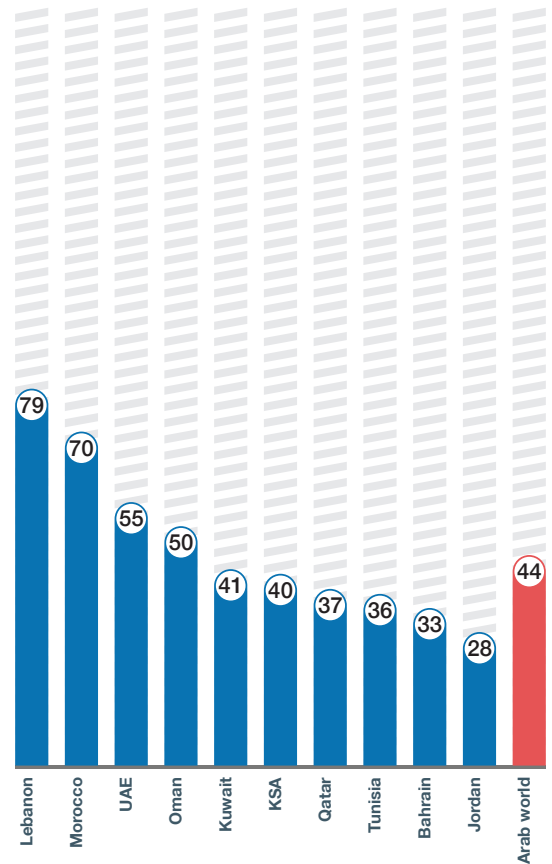
Around (9%) of social media users in Arab world are current subscribers in LinkedIn. Lebanon and Yemen had the highest current subscription rates (39% and 26%, respectively). While the least rates were for Egypt and Syria (1% in each)



### Daily Access to LinkedIn

Around **2** in **5** users covered by the survey access LinkedIn on daily basis. The highest percentages of current subscribers who access this channel on daily basis were in Lebanon followed by Morocco **79%** and **70%**, respectively). While the users in Jordan had the least percentage (**28%**)

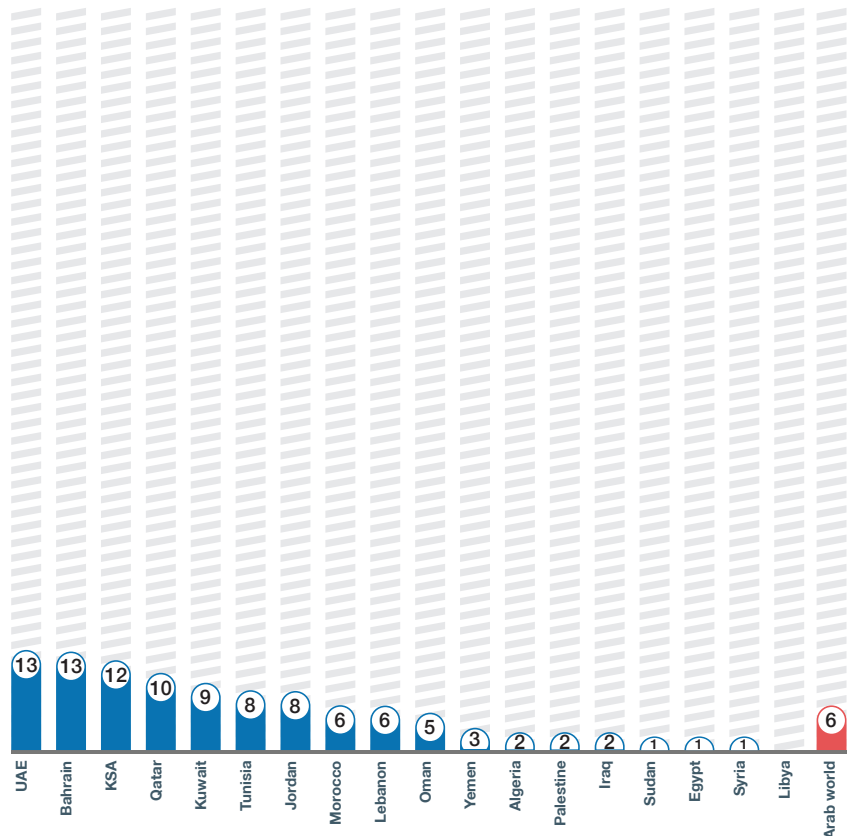
% of Facebook current subscribers who access it on daily basis per country



### Access to LinkedIn through LinkedIn App

Around (**6%**) of total LinkedIn users covered by the survey access LinkedIn through its app. Users in UAE and Bahrain had the highest rate for accessing it via their smartphones and/or tablets (**13%** in each). On the other hand, there are no users for the LinkedIn app in Libya

% of total users who visit LinkedIn through their smartphones and/or tablets



# **C) Impacts of Social Media**

## **1- Impacts on Arab Society**

The three main pillars of social media are **Communication, Knowledge and Entertainment** across all the Arab regions, without any notable differences from one region to another.

## Communication

Through communication, Social media flattens the world and reduces the distance, hence helping to bring people closer together.

It improves connections among people by offering them a means to communicate clearly without any hassles. It reduces cross cultural and geographical boundaries across continents. The world with social media has no boundaries!



**We spend more time with people on social media than with others in real life**



**15-24 year old,  
Moroccan female**



**Social media is useful for the betterment of your knowledge**



**25-35 year old,  
Egyptian female**

## Knowledge

On the knowledge and education front, social media opens up the horizons and enables people to research and learn about any topic they aspire for.

This modern technological tool is also an interactive means for receiving instantaneous updates about the world and its happenings

## Entertainment

Social Media is also seen as a source of entertainment which helps to break the routine and monotony of daily chores; it enables users to watch missed episodes/serials and sports events online and serves as an effective source of entertainment too.

Social media is also an economical communication tool, i.e. using WhatsApp, Viber and Facebook to communicate. Use of voice calls and text messages will incur significant telecommunication costs to consumers. This is especially important for Levant and North Africa countries, rather than the Arabian Peninsula region.



**I like to watch movies and TV series. Every week, I watch 2 or 3 movies, and an entire TV series in 3 days**



**25-35 year old,  
Jordanian male**



## SOCIAL MEDIA AS AN ENABLER OF OPEN COMMUNICATION

Social media is a platform for many of the Arab youth to express their point of view, their creativity and their genius. Social media is a shield and an enabler of expression and creativity: Without it, other more direct forms of expression (e.g. face-to-face) would feel overwhelming for certain young Arab individuals. The importance of freedom of expression is seen to be more salient in the Levant countries than in the remaining regions.



## CAREER OPPORTUNITIES

On the professional front, it allows one to find professional contacts and career opportunities through networking. North Africa users seem to be the keenest among other regions on career networking through the use of a couple of platforms.

It has also opened up opportunities for just about anyone in the Arab world to start up their own business; e.g. opening online business, empowering women to start businesses while at home. This aspect of opening small businesses is seen more relevant for the Levant followed by North Africa regions in particular, with less mentions in the Arabian Peninsula.



Many people use social media to express their ideas and points of views and to deliver them to many people. These people may be shy; they can't stand up in front of people and give them a lecture. But when they are sitting behind their computers or smartphones, they may write beautiful ideas. We would be fascinated with what they write



25-35 year old,  
Jordanian male



On the flipside, perhaps the most worrying consequences of the excessive use of social media is ironically 'social', i.e. lowering the frequency of personal meetings and visits, hence leading to weaker connections and relations in society, even among family members. This has been across all Arab regions without any exception.

In some extreme cases, this has led to family fragmentation, i.e. cases of divorce and estrangement from close family members, parents and siblings. These worrying signals are mostly felt in the North African region, with some mention in the Levant region as well.

Another worrying aspect is that nowadays the Arab youth - across all regions and countries - are 'living in an illusionary world, a virtual reality!' This reinforces the need for escapism from society instead of enabling these individuals to become more sociable. These individuals spend more time with virtual friends than with family and real friends.



Excessive use of social media also causes addiction across the Arab World. Obsession with social media is seen to distance people from performing basic duties such as prayer, outing with parents, and others. As such, this is considered detrimental to the culture and family values.



**No more personal visits. We are all in the same living room but no one is talking because we are busy looking at our phones**



**25-35 year old,  
Emirati female**



**Some people are addicted to it. It's like you feel alone in this world. There will be a gap... a BIG gap (if there will be no more social media)**



**25-35 year old,  
Egyptian female**

Being connected to social media almost bounds young individuals to their screens, leading to worrying states of inactivity and lethargic lifestyle, not just physically but also mentally. High levels of reliance on social media leads to less thinking.

Social media can be intrusive and invasive. Privacy issues arise as sometimes posts and chats meant to be private can be accessed. Concerns around this area are apparent in all the Arab regions, with emphasis in the Arabian Peninsula and the Levant regions mostly.

“**There is no privacy at all in social media. People can use the photos we put on Facebook and change it in a bad way**”

15-24 year old,  
Jordanian female



Social media users are also disturbed by some disrespectful content shown on the different channels. This is perceived to be happening due to lack of regulations and checks on the content, especially in the Levant region. Arabic language deterioration in the Levant region is also seen as a problem leading to increasing affinity of the user to learn foreign languages.

In addition, the new generation is seen to lack conversational skills, since they are mostly submerged in the digital world.



In the Arabian Peninsula, social media is also believed to have been used in certain Arab countries as an enabling tool for political purposes, which is known to sway the behavior of the youth in favor of political gains, e.g. Arab spring in Tunisia and Egypt, ISIS activities, etc.

Although youth believe social media injects so much happiness and excitement in their lives, opinion leaders across all regions believe social media has had a rather negative impact on the youth. Some of the negative consequences are believed to be:

- **Acting older than their age:** Wanting to live an adult life due to exposure to social media content destined for adults, e.g. dating at a younger age
- **Limited contact with parents:** “Social media has become their parents, and parents the gatekeepers”
- **Adopting Western culture;** even in clothing styles – hence straying further away from the Arab culture
- **Lack of content censorship for the youth**
- **Degradation in the level of education of the youth:** due to increased involvement of students in the digital world, rather than their studies, e.g. use of mobile phones inside the classrooms



**Social media can trigger violence.**



**25-35 year old,  
Lebanese male**



**You can post anything on Facebook. We can post about an explosion somewhere. You can't believe them**



**15-24 year old,  
Lebanese male**

Overall social media is seen to be incompatible with Arab culture: pushing social boundaries; it is alien to the Arab culture to meet new people/strangers, virtual dating, etc.

Social media is seen by opinion leaders in particular to promote narcissism and shallowness (especially among females) by increasing the need for show-off and losing focus on important life values. Women are also under pressure to look better leading to increased shopaholic behavior, being especially true for the Levant region.

## **2- Impacts on Businesses and the Macro-Economy**

## Social media and businesses

Organizations throughout the Arab regions have adopted social media in their business at different paces. Some can be classified as Change Embracers and other as Slow Adopters. Across all the surveyed Arab regions, it is noticed that the Arabian Peninsula businesses are rather early adopters of Social media as opposed to the remaining Arab markets. The level of adoption is somewhat lower in the Levant region, followed closely by North African region.

### Categories of organizations

- **Change Embracers:** These organizations are seen to be modern, proactive, interactive and open to the world. They use social media extensively in their business mainly for the purpose of creating affinity between them and their target audience.
- **Late adopters:** These organizations are reactive. They rather wait for the results of other organizations before adopting new trends. As such, they are seen to have limited use of social media in their business. These are mostly traditional businesses and governments throughout all the regions. However, governments in the Arabian Peninsula markets are more proactive than in the Levant and North African regions.

Being more inclined to change and having higher levels of adoption to social media, it is noticed that there are different categories of organizations in the Arabian Peninsula and the Levant regions. Such categories can be defined as Publicists, Specialists and Intracom (Levant only).



**Specialists** – Use social media in a professional setting. They advertise, monitor, and track social media chatter as required for work



**Publicists** – Use primarily for ads and new product launch communication.



**Intracom** – Use social media in an informal manner – using it for intra-office communication and coordination

The main drivers for usage of Social media in business can be summarized as follows:

## 1. Business Growth

- The entire Arab region has recognized the power of social media in impacting business growth.
- Social media is perceived to help perform a faster pace of work.
- Creating businesses on social media (e.g. Facebook)
- Driving business and sales: To communicate easily and quickly with consumers through apps, to use appealing visuals to sell products, to advertise brands, to facilitate payment.



## 2. Improving company image / Brand ambassadors

- Modern image of companies advertising on social media
- Social media allows for more direct interactions with consumers, hence strengthening the relationship with clients
- Benefiting from real time feedback from consumers
- Customer service: made easier, faster and more interactive
- If used improperly, social media can also tarnish reputation of companies



I got more members on the page and the group. It would be useful for employing people, posting news and recent activities of the company on the page. People would see it and that would be useful for our sales



Ad agency, Egypt



Advertising has changed. You use online tools and follow competitors to know what they did. Earlier, one billboard ad would be the same for a month. Now, an ad would be launched maybe 3 times daily



Advertising director, Lebanon



It helps you create the buzz that will get people to know you. The social media helps especially when you are targeting the right social media channels. We push some new information about new TV shows that are coming and what we are releasing. So yes, it helps, facilitates and shortens the way to reach the people on media



Media, UAE

### 3. Social Media as a Marketing tool

The drivers for using social media as marketing tools are the following:

- Inexpensive advertising on social media platforms; products, brands, events, etc.
- Direct target to the right consumers
- Targeting a large number of consumers
- Speed of message delivery
- Yet, believed to have still a long way to go to have total reliance on social media for driving sales



### 4. Job opportunities / Talent Hunt

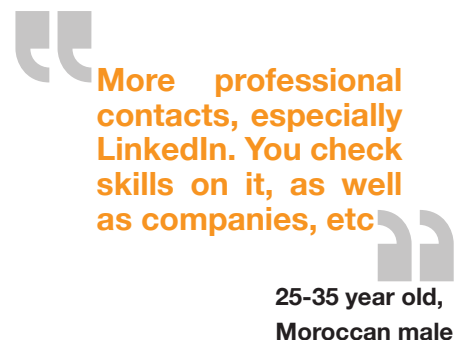
- Increasing career opportunities and job offers through LinkedIn
- Attracting the right talent
- Posting profile of company as a form of advertisement
- New job positions being created, especially in the social media industry
- Higher number of employees needed to work in the social media industry, on the technical level



### 5. Becoming more consumer-centric

Social media enables the Arab industries and companies to better understand consumers, new product innovations, and others through:

- Consumer feedback
- Gaining information about consumer behavior
- Analyzing and categorizing consumer thoughts and ideas
- This is mostly true for the Arabian Peninsula companies, but also promising in the Levant and North Africa regions.





## 6. Training employees

Social media is also used by some companies for training employees. As such, it allows tracking peers in other countries and learning about them. Social media is mostly used in the Levant region for training purposes.

## 7. Improving inter office relations

It helps to improve office relations by allowing group behavior among colleagues for better learning. Again, this aspect is mostly important for the Levant region.



**There are lots of satellite channels which are more developed than us. For example, I benefit from social media pages of BBC**



**Media manager, Iraq**

## 8. Improving service operations

Social media across all Arab regions is recognized to help improve service operations by offering a new mode of service which allows customers to place orders, book services, etc. via social media.

## 9. Driving entrepreneurship

- Creating new businesses, e.g. online business, apps for online selling, etc.
- Easier, faster and more cost efficient to open new businesses, e.g. no cost of brick and mortar
- Marketing in the era of social media has changed dynamically giving smaller companies a chance to flourish.



## 10. Innovations and new technologies

- Creative ways to do business, e.g. Uber, Apple Pay, i.e. using phones to make payments



## 11. Globalization

Creating new and wider markets, e.g. through online business, apps, advertisements on social media platforms



## 12. High marketing and advertising spend

Thus resulting in cash flows for the public and private entities, and consequently benefiting the economy. This is most impactful in the Arabian Peninsula region than others. However it requires the need to be transparent since people are investing time on social media to gain more information.



“**The ads displayed, the number of people who are online. They are having their own business on Facebook**

”  
**Economist, Lebanon**

“**The big drawback of social media is that the accuracy of information is less. Ordinary people can hurt a manager or a minister by misusing social media**

”  
**Media manager, Jordan**

### Some negative impacts on businesses

Social media is seen to have certain negative impact at work such as inaccuracy in information for planning and strategies by companies. These doubts are mostly manifested in the Levant region, and in some North African markets.

Social media throughout all the markets – and specifically in the Arabian Peninsula – is seen as a double edged sword, if the right content is not highlighted/displayed or communicated to the customers, there is a risk of tarnishing company reputation.

Existence of fake products, brands and companies abusing the consumer. These issues negatively affect the reputation of companies and lead to lack of trust among the social media users in business.

Lack of contact among the employees is also seen as detrimental to the business growth leading to poor working relations among employees.

### It is seen that social media is considered a threat to other media channels, especially noted in the Arabian Peninsula

- Currently taking a large share away from TV channels and print media
- Taking advertising spend away from traditional media channels
- Seen to be more expanding in the future
- Consequently, some businesses may become obsolete



Stock exchange in particular is highly affected by rumors that are spread on social media, and hence would have an indirect effect on the economy. This is mentioned by economist across the Arab regions.

Controlling those rumors is of utmost importance. Spreading a positive image through Social media would help grow the economy instead.

### Most used social media channels for businesses

- **Facebook:** the information and advertising channel, suitable for gathering/sharing information, advertising about products and brands
- **Viber, WhatsApp and Skype:** The Communication channel - free voice and video calls within organizations, employees, Job interviews and meetings through Skype
- **Twitter:** (Arabian Peninsula) - short, quick updates about the company can be provided officially