The *Arab Social Media Report* series aims to inform a better understanding of the impact of social media on development and growth in the Arab region by exploring the following questions:

- What are the penetration trends of social networking services in the Arab region?

- What is the growth rate, and what is the demographic and gender breakdown?

- What factors affect the adoption of these platforms in different Arab countries (e.g., income, youth population, digital access, Internet freedom, etc.)?

- What is the impact of these phenomena on citizen engagement and social inclusion?

- What is the impact of the new social dynamics influenced by social media on innovation and entrepreneurship in Arab societies?

Ultimately, we hope that the report findings shed light on the role social media is playing in the societal transformations taking place in the Arab world.

For additional datasets and charts unpublished in this report, join the ASMR community and register (at no cost) online at:

www.ArabSocialMediaReport.com

Non-registered members can download this report, and follow ASMR social networking groups through the website.

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The Role of Social Media in Arab Women's Empowerment

Overview

The societal and political transformations sweeping the Arab region have empowered large segments of the region's population. Many stereotypes have been shattered, with Arab youth, "netizens" and women becoming the main drivers for regional change. Arab women in particular have become more engaged in political and civic actions, playing a critical leading role in the rapid and historic changes that have swept the region. Meanwhile, the debate about the role of social media in these transformations has reached policy making circles at the regional and global levels.

Throughout 2011, social media usage continued to grow significantly across the Arab world, coupled with major shifts in usage trends. From merely being used as a tool for social networking and entertainment, social media now infiltrates almost every aspect of the daily lives of millions of Arabs, affecting the way they interact socially, do business, interact with government, or engage in civil society movements. By the end of 2011, Arab users' utilization of social media had evolved to encompass civic engagement, political participation, entrepreneurial efforts, and social change. With a critical mass of Arab users in many countries, governments have also begun to recognize social media's potential to develop more transparent, participatory and inclusive governance models. But while creative and socially-beneficial uses of social media abound, they are accompanied by new-found concerns surrounding issues of security, privacy, freedom of expression, and the disruptive uses of social media on foreign policy making and diplomacy.

The Arab region has recently experienced exponential growth in the use of social media. Previous issues of the *Arab Social Media Report* have explored this growth, which has been fueled in part by the use of networks such as Facebook, YouTube and Twitter in the movements of the so-called "Arab spring." The third edition of the report builds on these timely themes, which specifically explored the exponential growth of social media use in the Arab world, and the role of social networking tools in the civil movements in the Arab region. Given the heightened participation of Arab women in these movements over the past months, despite their diminished use of social media as compared to the world average, this issue of the report will address three main questions:

1. **Explaining the "Virtual" Gender Gap:** What are the factors contributing to the low level of social media use among Arab women, as compared to men's usage and to the global female average?[1]

2. **Trends in Social Media Usage:** Do Arab women perceive social media as useful to their needs? What are the usage trends?

3. **Social Media as a Tool for Women's Empowerment:** Can social media potentially increase women's civic participation in the Arab world and contribute to their political and economic empowerment?

Produced by the Dubai School of Government's Governance and Innovation Program, the *Arab Social Media Report* series continues to analyze usage trends of online social networking tools across the Arab region. Based on data collected in the second and third quarters of 2011, this edition of the report analyzes data on Twitter and Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey. In another first-of-its-kind regional survey, this special edition of the report explores the role of social media in Arab women's empowerment. The survey was conducted as a collaborative effort between the Governance and Innovation Program and the Gender and Public Policy Program at the Dubai School of Government.

The *Arab Social Media Report* series is part of a larger research initiative focusing on social engagement through ICT for better policy in Arab states, which explores the use of social networking services in governance, social inclusion and economic development. The initiative also studies the potential of social networking applications for increasing collaboration, knowledge sharing and innovation, both between and among government entities, citizens and the private sector.

1. Introduction

The growth and popularity of social media throughout 2011 has not shown signs of slowing down, either on a global level or within the Arab region. Globally, Facebook still dominates, with over 800 million users worldwide, of which 50% log in daily, while 350 million users access Facebook through mobile devices[2]. Twitter, on the other hand, reached over 100 million "active users" in September 2011[3], with an estimated 200 million "tweets" generated each day. Half of these active users log in every day, although not all of them tweet. About 40% of active users log in just to get news and information. Among several topics related to the popular movements in the Arab region, the top ten globally trending Twitter topics in 2011 included the resignation of Egyptian President Hosni Mubarak and the killing of Libyan leader Muammar Gaddafi.[4]

Globally, the most recent gender breakdown of social media usage (if we take Facebook, as an example) reflects that of real-world demographics, with the number of male and female Facebook users roughly equal.[5] This trend, however, does not hold in the Arab region, where only a third of Facebook users are women.[6] This ratio has not changed since the last edition of the *Arab Social Media Report* was published in May 2011, despite the fact that Arab women have been active on social media sites across the region throughout the "Arab spring." According to our findings, social media is increasingly viewed as an important tool for women's empowerment in the Arab region. Social media allowed women to take on a new form of leadership focusing on utilizing connections and networks. Moreover, Arab women were not merely cyber activists, but were documented as active participants on the ground, taking part in, organizing, and even leading protests, a fact recognized with the awarding of the Nobel Peace Prize to an Arab woman—Yemeni Tawakkul Karman—for the first time ever. Pictures abound of women in Tunisia, Egypt, Syria and Yemen taking to the streets and demanding change. Whether this activism will lead to broader inclusion of women in civic and political engagement down the line, or will merely see women being relegated to the sidelines, as has happened in previous Arab revolutions in the 20th century, remains to be seen.[7]

It is this connection between women's use of social media (though meager by global standards) and their political and civic empowerment that this edition of the report will explore.

Among many creative social media civil society initiatives, two prominent examples in the second half of 2011 of women utilizing social media to create change within their communities and countries are Saudi Arabia's "Women2Drive" campaign and Egypt's HarassMap initiative.

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[1] Arab Social Media Report, Vol. 1, Issue 2, 2011, Governance and Innovation Program, Dubai School of Government – www.ArabSocialMediaReport.com

[2] https://www.facebook.com/press/info.php?statistics

[3] http://blog.twitter.com/2011/09/one-hundred-million-voices.html

[4] http://yearinreview.twitter.com/en/hottopics.html

[5] www.facebook.com, accessed Dec. 2011

[6] *Arab Social Media Report*, Vol. 1, Issue 2, 2011, Governance and Innovation Program, Dubai School of Government – www.ArabSocialMediaReport.com

[7] http://www.economist.com/node/21532256

Table 1: Examples of Arab Women's Use of Social Media in Civic Participation

خريطة التحرش الجنسي **HARASSmap** ✉ **0169870900**	**Women 2Drive** مبادرة سـأقود سـيارتي بنفسـي
Launched in Dec. 2010, relaunched in Oct. 2011	**Launched** in May 2011
Objective: To help raise awareness of and tackle sexual harassment of women in Egypt through an SMS reporting and online mapping system.	**Objective:** To call for women's right to drive in Saudi Arabia.
Milestones in 2011:	**Milestones in 2011:**
June 21 – Blogging about sexual harassment day - #EndSH campaign[8]	May 21 – Campaign founder Manal Al Sharif's arrest sparks global support.[12]
August 29– Raising awareness about sexual harassment for a safe Eid holiday[9]	June 17 – Saudi women driving campaign begins.[13]
September 2 – HarassMap wins UNDP Youth Award.[10]	September 26 – Saudi government allowing women to vote and stand in municipal elections causes social media buzz.[14]
November 2– "Catch a Harasser" day[11]	
Online presence:	Online presence:
http://harassmap.org	http://twitter.com/W2Drive/
http://blog.harassmap.org	http://www.facebook.com/SaudiWomenSpring
http://twitter.com/harassmap	

2. The Role of Social Media in Arab Women's Empowerment and Civic Engagement - Regional Survey Findings

The societal and political transformations taking place across the region played an instrumental role in challenging stereotypes about Arab women as oppressed and subservient. In particular, the leading role that women have played in orchestrating and participating in social movements in Tunisia, Egypt, and Yemen has cemented their position as equal partners to men in transforming the political landscapes in their countries. The most obvious acknowledgement of this leadership role was the awarding of the Nobel Peace Prize to an Arab woman, Tawakkul Karman, a leading female Yemeni political activist. Whether Arab women's civic and political engagement will be enhanced in the aftermath of the "Arab Spring" remains to be seen.

Although social media has been a powerful tool throughout these popular movements, whether for mobilization or disseminating information[15], Arab women's use of social media is low compared to men in the region, as well as in comparison with the global female social media usage average (for example women make up about half of Facebook users globally, while arab women only make up a third of users in the region).

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[8] http://ow.ly/5hFtB

[9] http://on.fb.me/o13GVW

[10] http://www.thedailynewsegypt.com/media/egyptian-harassment-website-wins-undp-youth-award.html

[11] http://on.fb.me/rXzhlV

[12] http://www.bbc.co.uk/news/world-middle-east-14240340

[13] http://mashable.com/2011/06/17/saudi-women-driving-campaign-begins/

[14] http://www.bbc.co.uk/news/world-middle-east-15063938

[15] *Arab Social Media Report,* Vol. 1, Issue 2, 2011, Governance and Innovation Program, Dubai School of Government – www.ArabSocialMediaReport.com

> **Most respondents thought that Arab women are less likely to use social media because of the societal and cultural constraints imposed on women.**

The role of social media in women's empowerment in the Arab world has been highlighted repeatedly during 2011, but hardly any research has been conducted on the subject. As a first step in studying Arab women's use of social media and its potential for women's empowerment and civic engagement, the Governance and Innovation Program (GIP), in collaboration with the Gender and Public Policy Program (GPPP) at the Dubai School of Government conducted a research project aiming to address the following questions:

1. **Explaining the "Virtual" Gender Gap:** What are the factors contributing to the low level of social media use among Arab women, as compared to men's and to the global female average?

2. **Trends in Social Media Usage:** Do Arab women perceive social media as useful to their needs? What are the usage trends?

3. **Social Media as a Tool for Women's Empowerment:** Can social media potentially increase women's civic participation in the Arab world and contribute to their political and economic empowerment?

The online survey ran from mid August to mid October 2011, targeting[16] men and women of all ages from all 22 Arab countries. We received 469 full responses, and 62% of these were from women. At the national level, we highlight three Arab countries—Saudi Arabia, Egypt and the UAE[17]—to illustrate similarities and variations between country responses. The typical respondent was aged between 15 and 40 years old, holding at least a bachelor's degree (with 40% holding master's degrees). The findings were analyzed at both a national and regional level, with an emphasis on gender variations in responses. Overall, no major gender differences in responses to our questions were found between participants at the regional level, and even when breaking the responses according to nationality, we only found slight variations between male and female responses.[18]

In its first part, the survey explored and highlighted the gender gap in social media usage in the Arab world. Given the sizable difference in percentage of male and female users in the region (the latter constituting only a third of Facebook users)[19], respondents were asked to identify the main barriers that they perceived were holding back Arab women from fully utilizing social media. The largest of these barriers was identified as the societal and cultural constraints placed on women in the Arab world.

To further benchmark women's use of social media against men's in the Arab world, the second section of the survey explored Arab men's and women's social media usage trends; these proved to be very similar, with networking, access to information and jobs, as well as activism ranking as top purposes for the use of social media among both men and women. Follow-up questions about how social media was used for activism provided a more in-depth exploration of how men and women used social media as a tool for political engagement.

Lastly, the survey delved into male and female respondents' perceptions of how social media impacts Arab women, and its potential as a tool for women's empowerment. Most felt that social media could, in fact, enhance women's participation in the legal, political, economic, social and civic arenas, although there was some ambivalence as to whether the empowering effects of social media are limited in the absence of actual changes in gender equality legislation and rights on the ground.

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[16] The targeted sample came from an extensive regional database of contacts collected by the GIP and GPPP, covering all Arab countries.

[17] These countries were selected because they include a country that went through a popular revolution (Egypt), a country that witnessed limited civil popular movements (Saudi Arabia), and a country that did not witness any popular movement (UAE)

[18] When broken down to the national level, sample sizes were too small to allow us to draw concrete conclusions about gender differences at the national level; however, they do indicate a need for a more in-depth exploration of these gender differences in future research.

[19] *Arab Social Media Report II - Civil Movements: The Impact of Facebook and Twitter* http://www.arabsocialmediareport.com/

The main findings are elaborated below:

## 2.1 Explaining the "Virtual" Gender Gap

At the **regional** level, most respondents thought that Arab women are less likely to use social media because of **the societal and cultural constraints imposed on women (see Figure 1)**. Other reasons for the virtual gender gap in social media use that were listed by both male and female respondents included privacy and security issues, ICT literacy, access, confidence in social media, education, and the availability of "relevant content" for women.

Figure 1: "Research shows that women in the Arab world use social media less than men when compared to the global average. Why do you think this is?" (Regional gender breakdown)
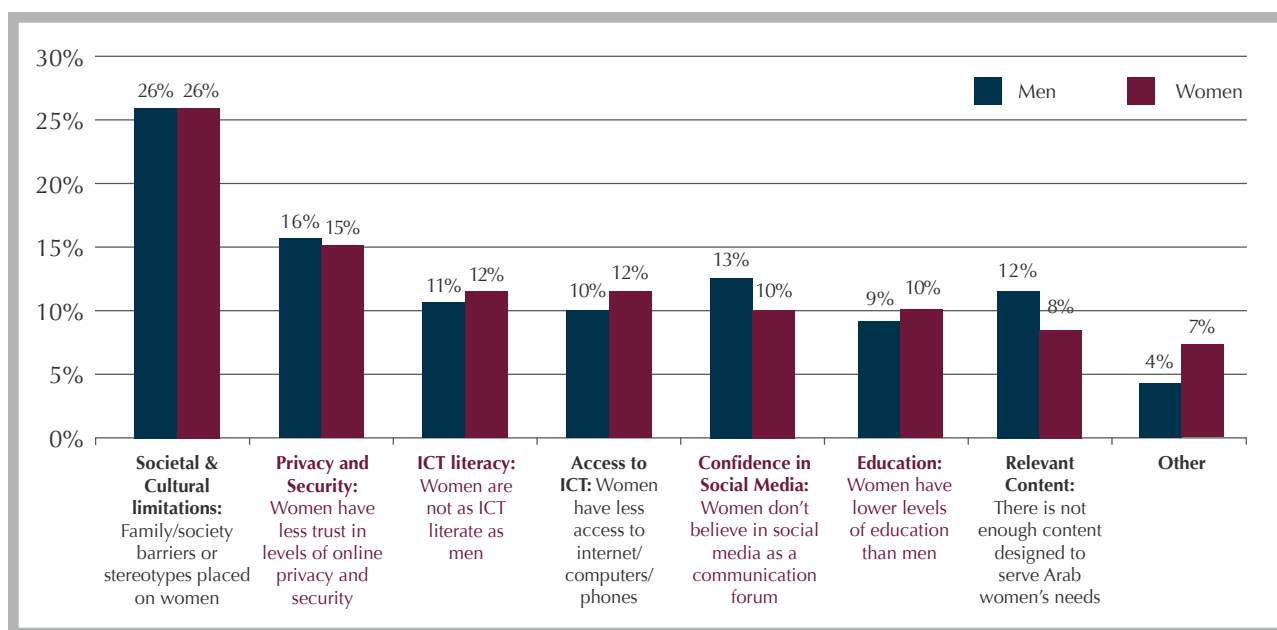
On a **national** level, responses varied slightly. While "societal and cultural limitations" were ranked as the top barrier across all three countries, Saudi Arabia had a slightly higher than average percentage, in comparison with regional levels[20] **(see Figure 2)**.

Figure 2: "Research shows that women in the Arab world use social media less than men when compared to the global average. Why do you think this is?" (National breakdown)

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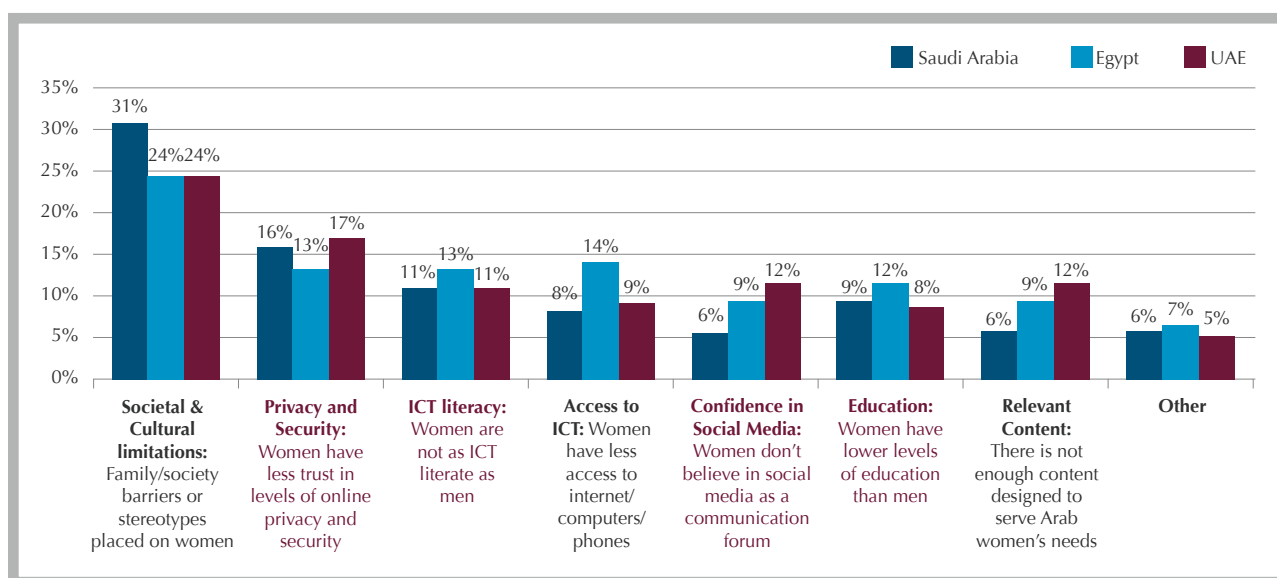
[20] The country level differences between Saudi Arabia, Egypt and the UAE were not tested statistically due to relatively small sample sizes. As such, these results are not meant to posit concrete conclusions about gender differences at the national level but, rather, indications of possible trends.

2.2 Trends in Social Media Usage by Men and Women in the Arab World

2.2.1 Social Media Use

After almost a year of popular movements in the Arab countries, at a regional level most men and women in the Arab world primarily use social media to access information and connect with people, according to the survey respondents. A lower percentage of men and women also use social media to contribute to civic and political activities, for professional purposes, and for job hunting **(see Figure 3)**.

Figure 3: "What do you use social media for?" (Regional gender breakdown)
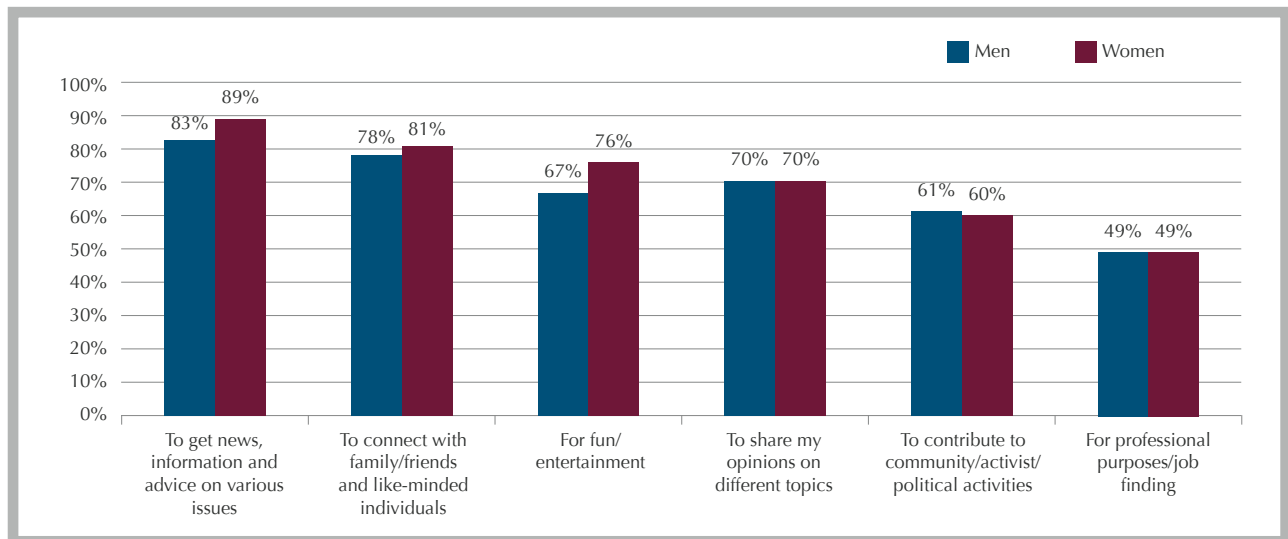
On a **national** level, responses were fairly similar across the three highlighted countries. With regards to political factors, some minor regional variations existed, such as in both the "use of social media to share opinions" and to "participate in civic and political activities." In these instances, Saudi Arabia showed a slightly higher than average response when compared to the regional level, while the UAE showed a slightly lower than average response **(see Figure 4)**.

**Figure 4: "What do you use social media for?" (National breakdown)**
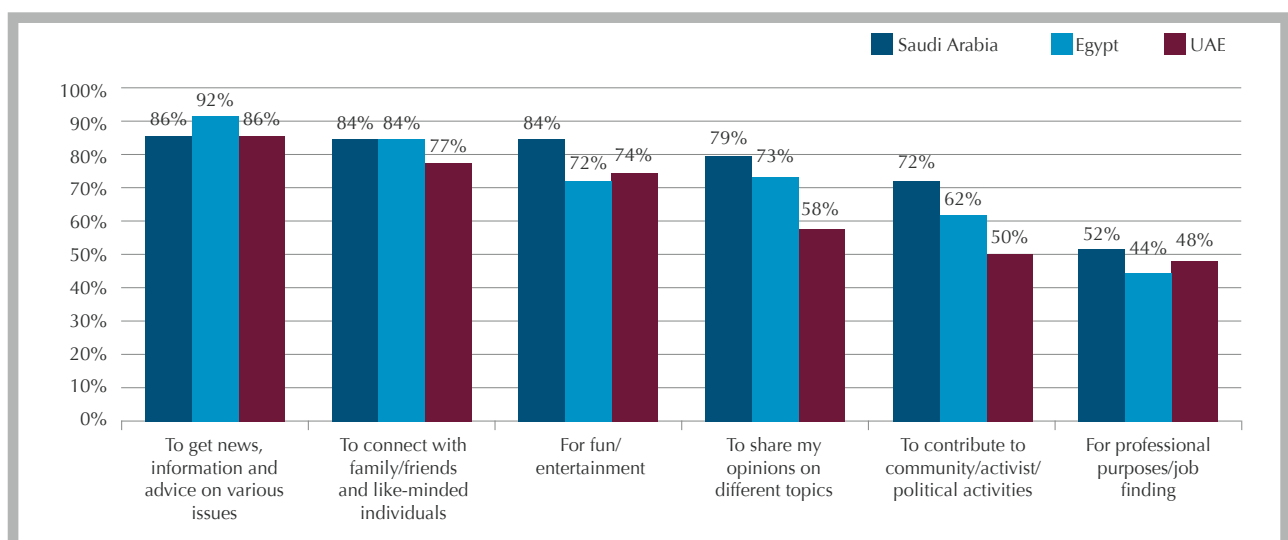
2.2.2 Concerns about Using Social Media

As observed by this survey as well as by earlier research published in previous editions of the *Arab Social Media Report*, with so many respondents using social media to raise awareness, share ideas and information, and engage in civic and political activities—whether for political reasons or otherwise—issues related to freedom of expression are natural concerns.

On a **regional** level, men and women indicated that expressing their social and political views using social media could have negative repercussions, the main one being the fear of being held accountable by authorities, followed by negative reactions from family, society and the opposite sex. However, 20% of respondents indicated that there were no negative repercussions to using social media at all **(see Figure 5)**.

Figure 5: "What do you see as possible negative repercussions of expression of social/political views using social media?" (Regional gender breakdown)
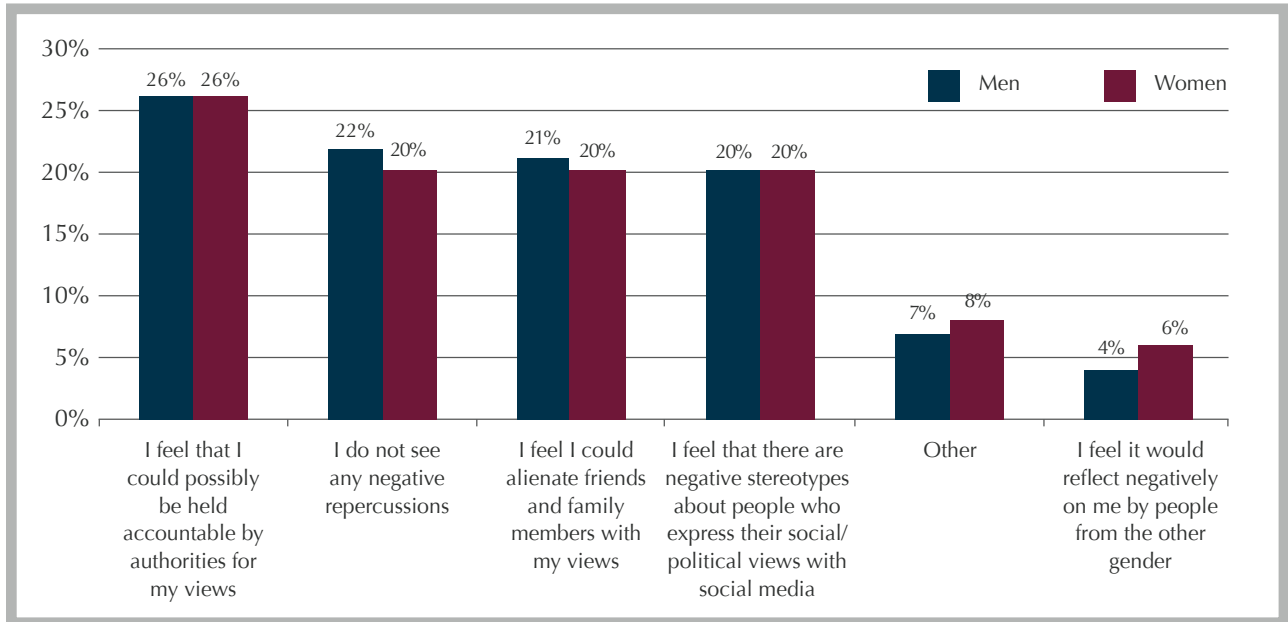
On a **national** level, responses varied slightly across the three countries, in that one third of Egyptian respondents thought there were "no negative repercussions" to expressing one's social and political views using social media, whereas the percentage was lower in Saudi Arabia and the UAE. In the latter two countries, a third of respondents were concerned about being held accountable by authorities, whereas only 16% of respondents in Egypt shared that concern **(see Figure 6).**

Figure 6: "What do you see as the possible negative repercussions of expression of social/ political views using social media?" (National Breakdown)
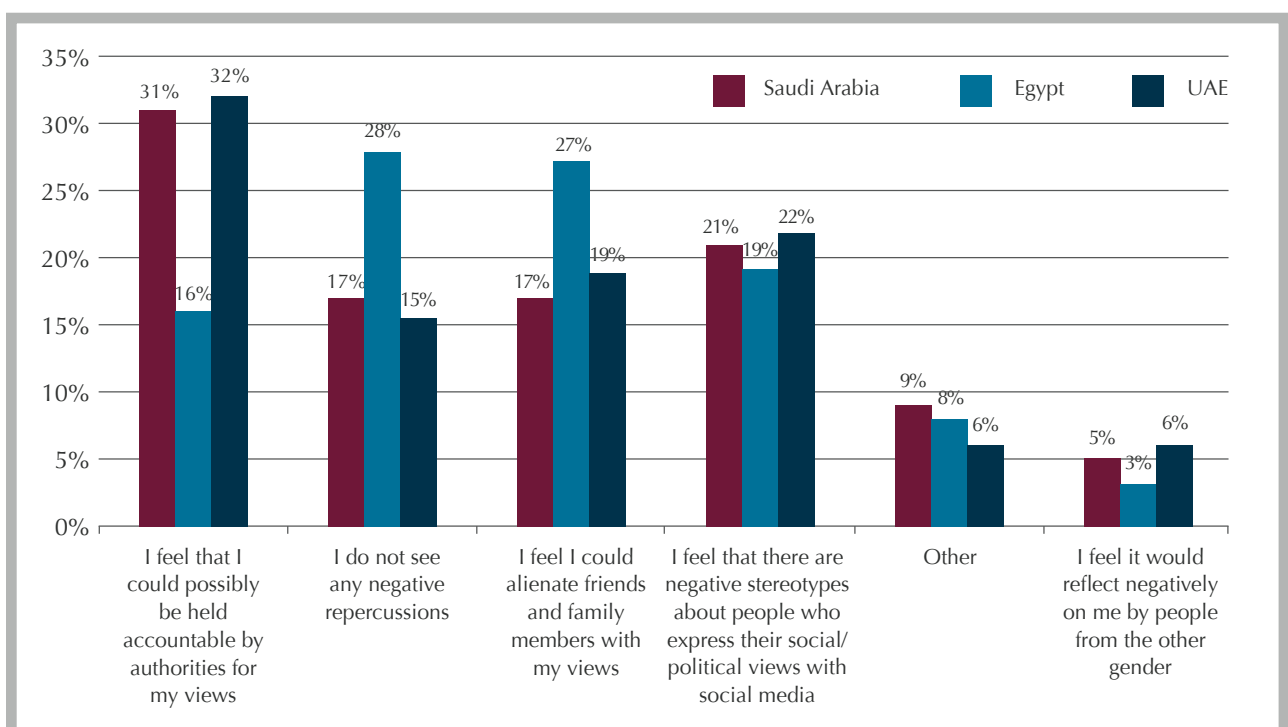
2.2.3 Uses of Social Media in the "Arab Spring"

On a **regional average**, in countries that witnessed uprisings or popular movements[21]- there are **slight gender differences between men's and women's uses of social media during the "Arab spring"** according to the survey respondents. While the top two uses of social media were for the purpose of raising awareness and spreading information about the events related to uprisings and revolutions, a slightly larger percentage of men than women used social media for these purposes. Although this was the lowest ranking use of social media on a regional level, a larger percentage of Arab women among the survey respondents said that they used social media to organize actions and manage activists **(see Figure 7)**. Figure 8 further highlights examples of social media usage during the Arab Spring in selected countries.

Figure 7: "What was your primary use of social media during the uprisings/revolutions/civil movements in your country?" (Regional gender breakdown)
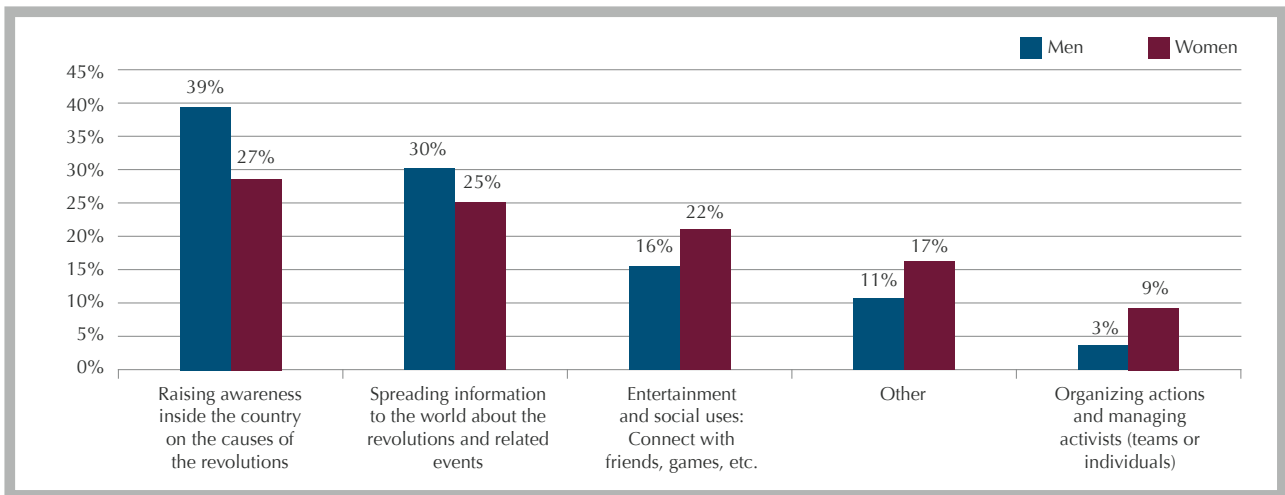
Box 1: Social Media Usage during the Arab Spring: Spotlight on Saudi Arabia and Egypt

Honing in on countries where there were popular movements on the ground, we picked two countries, Saudi Arabia and Egypt, to highlight the contrasting responses to this question. While Egypt was in line with the regional views, having ranked 'raising awareness about the events related to the revolutions' as the top use of social media during the revolution there, Saudi Arabia, which witnessed limited popular uprisings, ranked that second, with "entertainment and social uses" being the top use (see Figure 8).

Figure 8: "What was your primary use of social media during the uprisings/revolutions/civil movements in your country?" (National breakdown)

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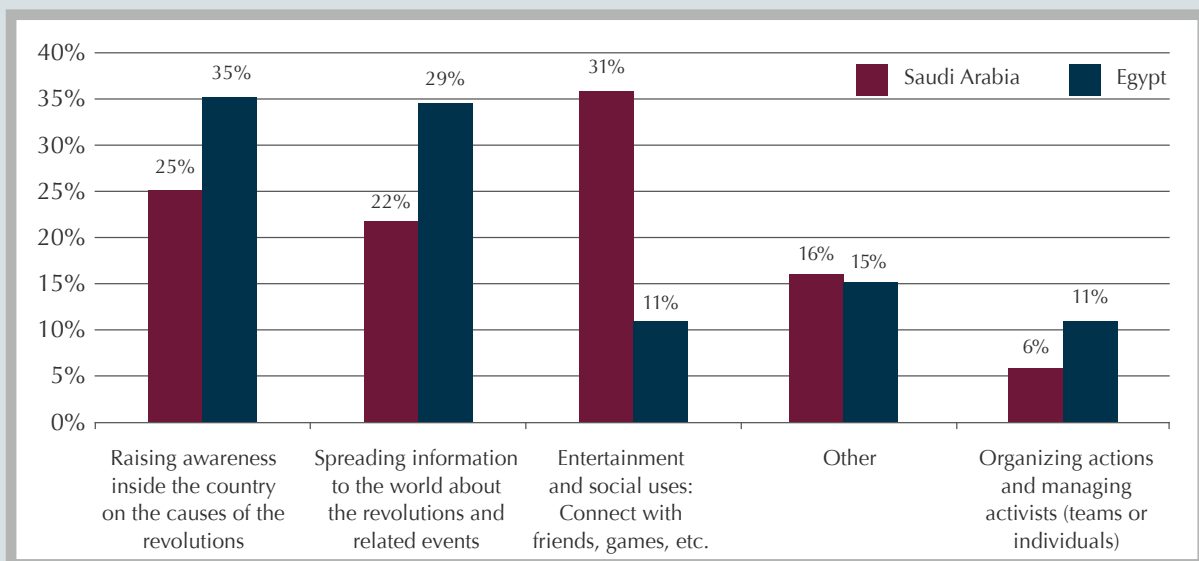
[21] These encompass respondents from all Arab countries except the UAE and Qatar

2.3 Social Media as a Tool for Women's Empowerment

On a **regional** level, **a high percentage of respondents felt that social media could be an empowering tool for women,** enhancing their participation in several facets of their lives, including the legal (by promoting women's rights), economic (enhancing entrepreneurial and employment opportunities), political (increased political participation), and social (through self-expression and promoting social change) aspects **(see Figure 9)**. Interestingly, although by a negligible margin, the only response where a slightly larger percentage of men than women agreed that social media can play a positive role in gender equality was "social media allows for greater gender equality in political participation."

Figure 9: "To what extent do you agree with following statements regarding women and social media?" (Regional gender breakdown)
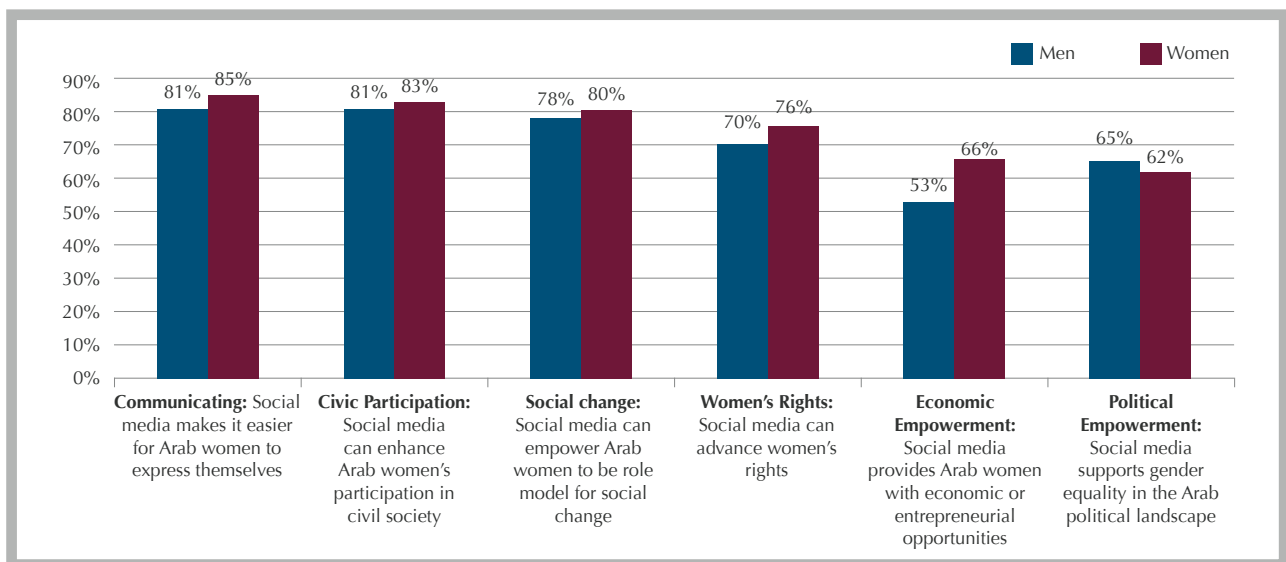
On a **national level,** responses showed some variation. However, overall, results showed that the majority of men and women respondents thought that social media can be a tool for women's empowerment in their countries. Given the low ranking of most of these countries on gender equality and women's empowerment indices[22], the participants' optimistic responses indicate that social media users in the Arab region view this media as a potential catalyst for changing gender inequalities in the region **(see Figure 10)**.

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[22] For example, the Arab region ranks the lowest on a global scale in The World Economic Forum's **Global Gender Gap Index** in terms of gender equality as a whole, and in terms of two of the Index's pillars, ***political empowerment*** and ***economic participation and opportunity***. See http://www.weforum.org/issues/global-gender-gap

Figure 10: "To what extent do you agree with following statements regarding women and social media?" (National breakdown)
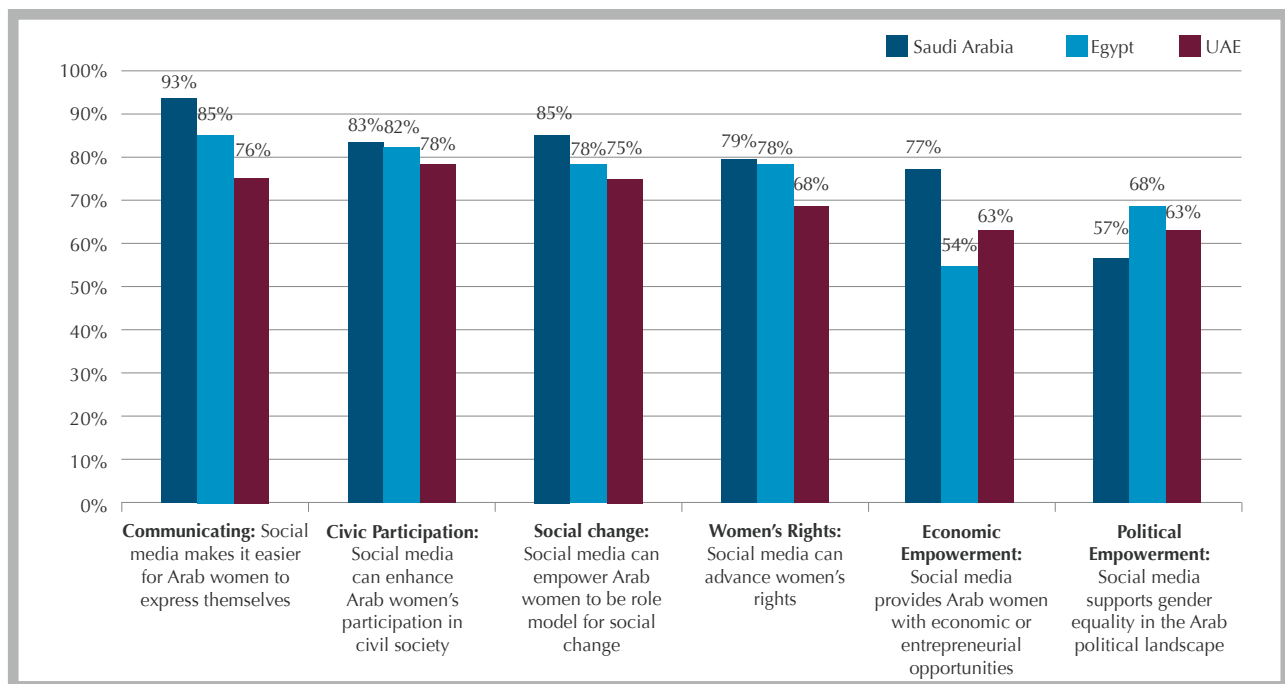
However, 40% of respondents at the regional level felt that social media could present new concerns for Arab women's civic participation in particular. This ambivalence is also reflected in some of the comments made by respondents (in Box 2), highlighting two of the selected different points of view.

Box 2: Selected Comments Highlighting Different Views on Social Media's Impact on Women and their Civic Participation

Social media is not a sufficient tool to affect change for women:

"I believe the Arab women should not depend on the social media cover to express their opinion or produce role models, it starts out in the interaction with the people not behind the screen."

"All stakeholders must be involved. Social media is a great way to find out where women are at with regards to the issues. (This) doesn't always or necessarily translate into them doing or being able to do something about affecting change."

Social media as a useful tool for women's empowerment:

"During the . . . . unrest, several women emerged in the social media scene and have proven that they are present and not to be taken lightly or sidelined. In fact several have been more active than their male counterparts."

"(Social media can help with) education for self-empowerment, recognition of women's rights, and benefiting from other experiences outside the Arab region."

> **Barriers to Arab women using social media are predominantly environmental and require efforts in addressing discriminatory attitudes and cultural constraints on women.**

2.4 Social Media and Arab Women's Empowerment – Key Findings and Conclusions

Social media is increasingly viewed as an important tool for women's empowerment in the Arab region. Indeed, the *Arab Social Media Report* regional survey findings show that many of the responses of male and female social media users were similar, indicating that social media may be a "gender equalizer." The existing gap in Arab women's usage of social media compared to men and to the global average is primarily a result of perceived societal and cultural constraints Arab women continue to face in the region. The key conclusions of the regional survey findings are as follows:

Explaining the social media gender gap in the Arab world

In the Arab world, men remain twice as likely as women to be users of social media. The barriers to women's utilization of social media can be divided into two categories: Environmental and Personal. Environmental factors constitute the largest barriers to Arab women's use of social media, specifically "societal and cultural constraints," in addition to "access to ICT" and "lack of relevant content for women." These factors have more to do with the environment in which female social media users operate. On the other hand, the personal factors, which have more to do with the skills or abilities of female social media users themselves, such as "levels of education," "ICT literacy," "confidence in social media" as a means for communication, and "levels of trust in ICT's security and privacy" are all viewed as barriers, but with smaller impact (highlighted in red in Figures 7 and 8).

How can this "virtual" gender gap be closed? If the barriers to gender equality in social media use are mainly personal, then any interventions to address this gender gap should be focused on "fixing the women" by introducing more training for women or increasing their education, for instance. However, the regional survey results clearly show that barriers are predominantly environmental, and require efforts in addressing discriminatory attitudes and cultural constraints on women.

Social media as gender equalizer

The findings of the survey show clear similarities in the views of male and female social media users in the Arab region.[23] Arab men and women largely agree on issues related to social media and its implications for women and civic participation. They use social media in similar ways and have similar opinions on the role that social media can play in women's empowerment. Whether this is a result of using social media, or has more to do with the typical profile of a social media user, warrants further research.

Social media and changing perceptions about women and civic participation

Perhaps the most important finding of this research is the shared view of social media as a tool for women's empowerment. The majority of respondents felt that social media had the potential to be an empowering and engaging tool for women, whether in social, economic, legal, political or civic arenas. These perceptions contrast with the reality of gender inequalities that persist in the Arab region when it comes to these domains. In that sense, social media can potentially be a "change agent" towards women's empowerment in Arab societies. It is positively viewed by many social media users, whether men or women, as a medium that can trigger changes and offer new approaches for addressing these inequalities.

> **Arab men and women largely agree on issues related to social media and its implications for women and civic participation. They use social media in similar ways and have similar opinions on the role that social media can play in women's empowerment.**

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[23] However, more nuanced research into the differences in social media usage between the three highlighted countries (Egypt, Saudi Arabia and the UAE) is required.

Social media: A panacea for women's empowerment?

Gender inequality prevails in "real life," within the political, social and economic arenas in the Arab world. This is apparent in the Arab region's low rankings in terms of gender parity within the political empowerment and economic participation pillars of various women's empowerment indices, as well as in regional and international reports such as the *Arab Human Development Reports*.

Even though social media is largely viewed as a tool for empowerment, giving women access to and enabling them to create entrepreneurial opportunities, social change, and civic and political action, 40% of respondents asserted that social media may also present new concerns for women's civic participation. Additionally, the overarching "real life" barriers for women's empowerment may not be surmountable using social media alone. While "virtual" participation might be a first step towards women's empowerment, it may not necessarily translate into real-life participation in mainstream political, civic and public arenas. The real-life barriers on the ground within these arenas should not be underestimated, and need to be addressed in efforts to promote gender equality in the region.

It is promising, however, that a a majority of male and female respondents perceive social media as an enabler for women's empowerment. This is coupled with the robust growth of social media usage among youth in the Arab region. If lessons are to be drawn from youth utilization of social media during the recent popular movements in the Arab world, then in light of the growing sense of empowerment today, the strong positive perceptions shown in our survey suggest that social media can continue to play an important role in empowering Arab women in the future. However, this will only be realized when a critical mass of young Arab women—and men—embrace social media with the objective of influencing societal change

# 3. Mapping Facebook in the Arab World – Q2 and Q3 2011

This edition of the *Arab Social Media Report* continues to explore social media usage in the Arab region, focusing on both Facebook and Twitter. This section, specifically, provides an update on Facebook usage during the second and third quarter of 2011, building on Issue II of the report, which provided an overview of Facebook users in the first quarter of the year. As such, the number of Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey, was collected periodically between April and October 2011, in the following age brackets — youth (15-29), and adults (30 and over) — as well as by gender. Below are the key findings:

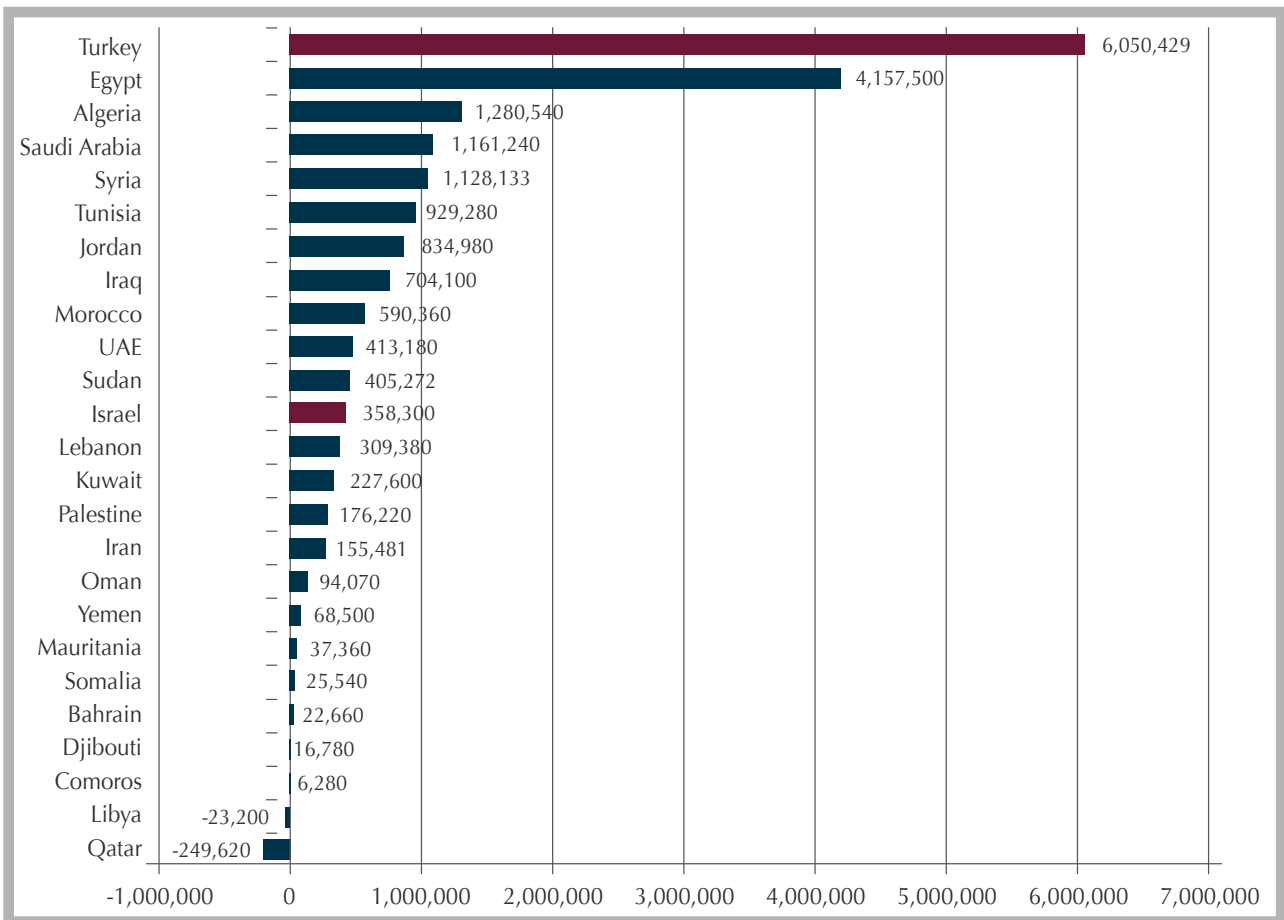**Penetration and uptake**

Facebook in the Arab World: A Snapshot

- The total number of Facebook users in the Arab world stands at **36,016,664 (as of Nov, 2011),** up from **21,377,282 (January 5, 2011), having almost doubled since the same time last year (19,945,487 in Nov. 2010).**

- At the beginning of November 2011, the country average for Facebook user penetration in the Arab region was **approximately 10%, up from just under 6% at the end of 2010.**

- The number of Facebook users in the Arab world increased by **68%** between **January and November 2011.**

- The percentage of female users is at a standstill since April 2011, at **33.5%**. This is still significantly lower than the global trend, where women constitute **roughly half** of Facebook users.

- Youth (between the ages of 15 and 29) make up around **70%** of Facebook users in the Arab region, a number that has been holding steady since April 2011.

- GCC countries no longer dominate the top five Arab Facebook users as percentage of population. While the UAE remains at the top of the Arab region, Kuwait is the only other GCC country in the top five, with Lebanon, Jordan and Tunisia in the remaining spots.

- Egypt still constitutes about a **quarter** of total Facebook users in the Arab region, and has added more users in the past year than any Arab country, at over 4 million new Facebook users between January and October 2011.

- English, Arabic and French are the dominant languages on Facebook for both men and women, although a slightly higher percentage of women than men prefer English, while the reverse is true for Arabic.

Figure 11: New Facebook Users In the Arab Region and Globally (Jan. 5 – Oct. 1, 2011), as Percentage of Population*
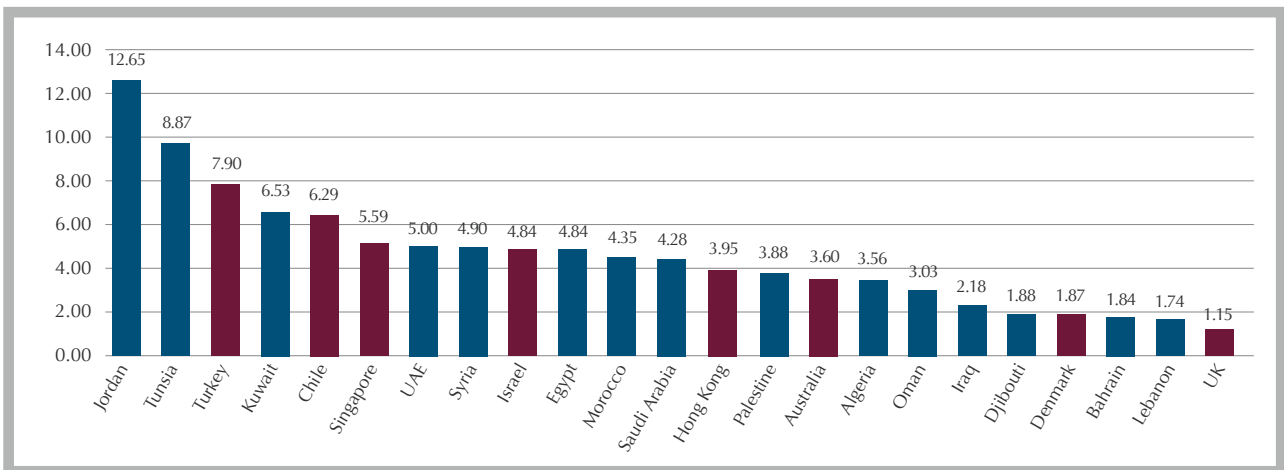
* 2011 populations, from United Nations ILO Department of Statistics, http://laborsta.ilo.org/, except GCC countries (which used official GCC population data).

Figure 12: Number of New Facebook Users in the Arab Region, plus Iran, Israel and Turkey (Jan. 5 – Oct. 1, 2011)

When comparing the uptake of Facebook in Arab countries with that in some of the top ten countries[24] (in terms of Facebook penetration worldwide), several Arab countries still outpace the top 10 countries in terms of new users acquired between January and October 2011, as percentage of population. At the beginning of October 2011, fifteen Arab countries had acquired more Facebook users (as a percentage of population) than the UK, one of the highest ranking countries in the world in terms of Facebook penetration (see Figure 11). In comparison, Turkey has also acquired a large number of new Facebook users (both as a percentage of population, and in terms of actual numbers), and has outpaced a lot of the Arab

[24] Iceland, Hong Kong, Singapore, Chile, Norway, Denmark, Canada, Australia, UK, US

countries. With over 6 million new Facebook users signing up between January and October 2011, Turkey has acquired almost 50% more new Facebook users than Egypt (4.2 million) over the same period (see Figure 12).

The Arab countries population numbers used in this report were compiled based on the United Nations International Labour Organization Department of Statistics.[25] However, these figures from international reports conflict with more recent official GCC population numbers. Consequently, official population numbers from GCC national statistics offices[26] were used instead to ensure accuracy.

On a regional level[27] , the Arab countries can be divided into three groups according to their Facebook penetration rates **(Figure 13)**:

Figure 13: Facebook User Penetration in the Arab Region, plus Iran, Israel and Turkey (Oct. 1, 2011)[28]
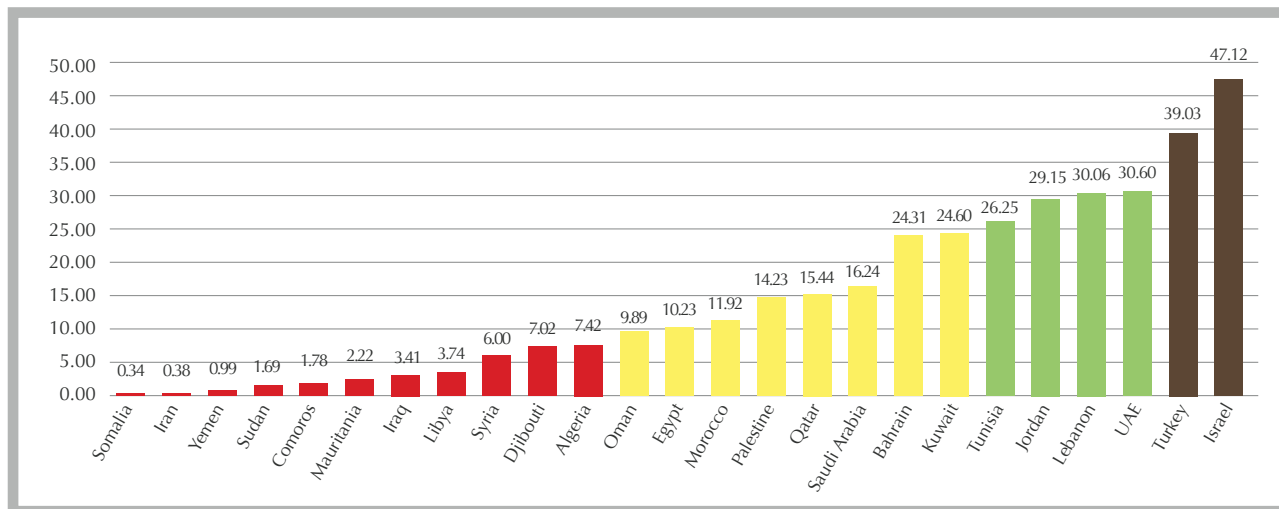
1. **High Penetration**: These countries' Facebook user penetration rates indicate persistent growth and a pervasive use of Facebook in their societies. (Facebook penetration between 25% - 30%)[29]

2. **Emerging countries**: These countries' Facebook user penetration ranges from 10%-25%, indicating a medium penetration of Facebook users.

3. **Developing users**: These countries have low rates of Facebook user penetration, ranging from less than 1% to just under 10%, indicating room for growth.

The rankings have shown an interesting change in the top five since the beginning of the year, with Qatar and Bahrain completely slipping out of these top rankings, and Lebanon, Jordan and Tunisia taking the second, third and fourth positions, respectively. This is partly due to the use of official GCC population figures in calculating the Facebook penetration rates (as opposed to the ILO figures used for the rest of the countries). The official population numbers, which are significantly higher than ILO estimates, caused the penetration rates for some GCC countries to drop significantly. However, Lebanon, Tunisia and Jordan have all seen genuine and significant growth in the number of Facebook users as well since the beginning of the year.

Figure 14 highlights the numbers of Facebook users and their penetration as percentage of total Facebook users in the Arab world.

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[25] http://laborsta.ilo.org/

[26] *Arab ICT Use Report 2010*, Madar Research, Dubai, UAE

[27] Turkey, Iran and Israel are also included for comparative purposes in this report, as Middle Eastern countries that share certain socio-economic and geopolitical characteristics with many Arab countries.

[28] 2011 populations, from United Nations ILO Department of Statistics, http://laborsta.ilo.org/, except GCC countries (which used official GCC population data).
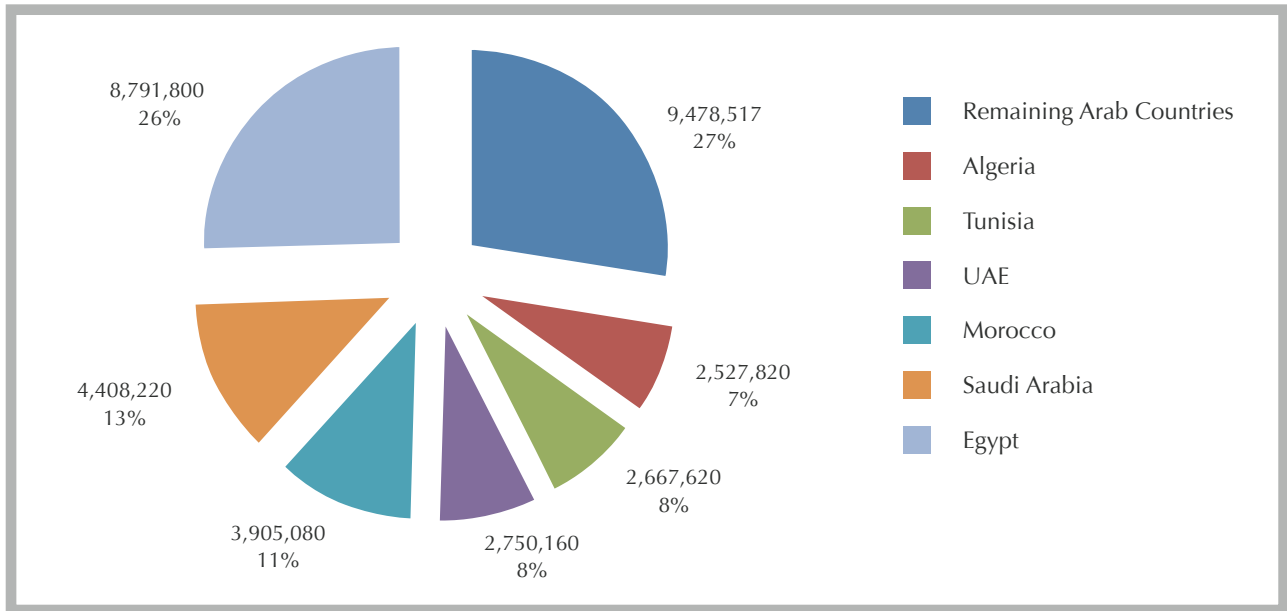
[29] This cutoff percentage has been lowered compared to Issues 1 and 2 of the Arab Social Media Report (30% and above), due to the use of official GCC population numbers instead of ILO numbers.

> ❝ **Youth (between the ages of 15 and 29) still make up around 70% of Facebook users in the Arab region, a number that has been holding steady since April 2011.** ❞
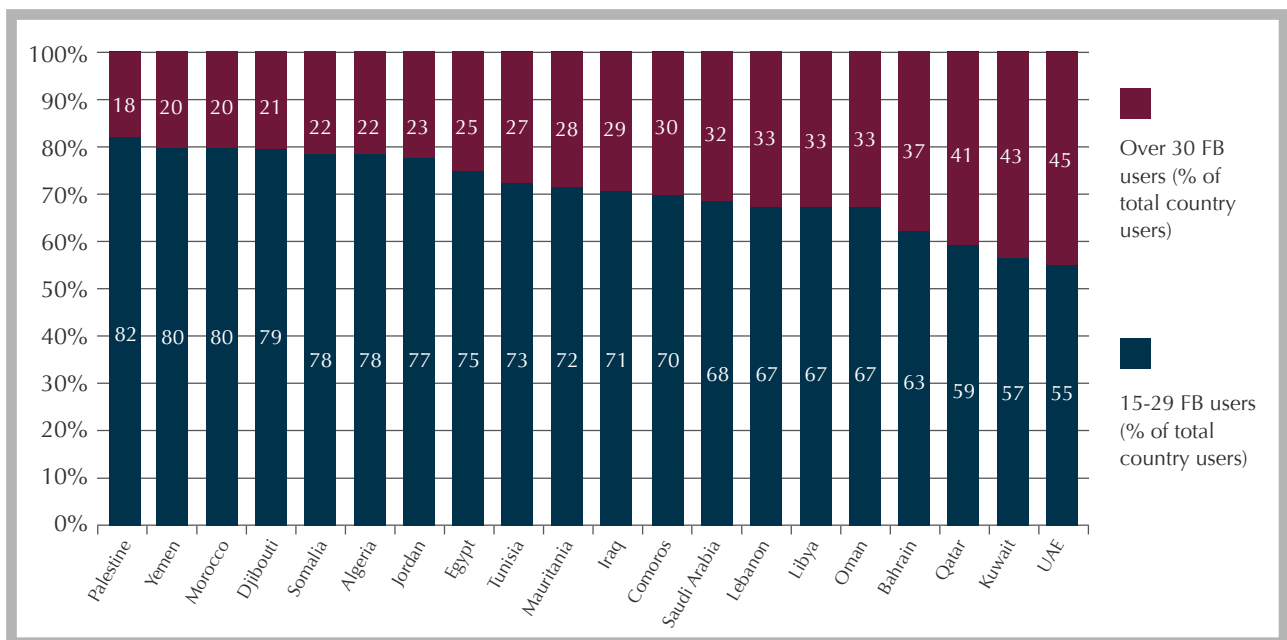
Figure 14: Number of Facebook Users and Percentage of Users in the Arab Region (Oct. 2011)

- 8,791,800 — 26%
- 9,478,517 — 27%
- 2,527,820 — 7%
- 2,667,620 — 8%
- 2,750,160 — 8%
- 3,905,080 — 11%
- 4,408,220 — 13%

Legend:
- Remaining Arab Countries
- Algeria
- Tunisia
- UAE
- Morocco
- Saudi Arabia
- Egypt

Demographic and gender breakdown of Facebook penetration

Youth (between the ages of 15 and 29) still make up around 70% of Facebook users in the Arab region, a number that has been holding steady since April 2011. Moreover, the UAE is still the most balanced in terms of adult and youthful Facebook users, while countries such as Palestine, Yemen and Morocco persist in having a predominantly youthful Facebook user population **(see Figure 15)**.

Figure 15: Demographic Breakdown of Facebook Users in the Arab Region* (Oct. 2011)

Country	Over 30 FB users (%)	15-29 FB users (%)
Palestine	18	82
Yemen	20	80
Morocco	20	80
Djibouti	21	79
Somalia	22	78
Algeria	22	78
Jordan	23	77
Egypt	25	75
Tunisia	27	73
Mauritania	28	72
Iraq	29	71
Comoros	30	70
Saudi Arabia	32	68
Lebanon	33	67
Libya	33	67
Oman	33	67
Bahrain	37	63
Qatar	41	59
Kuwait	43	57
UAE	45	55

* Excluding Syria and Sudan. Due to US imposed technology sanctions on both countries, no data on demographic breakdown of Facebook users could be obtained.
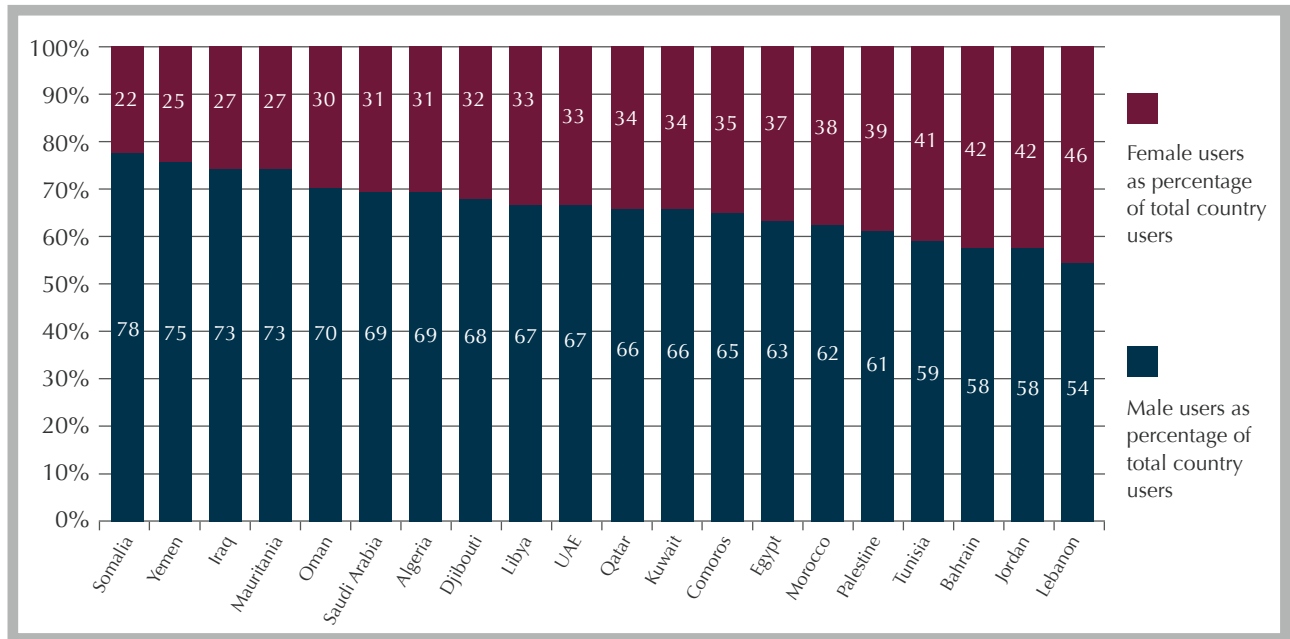
The **gender breakdown** of Facebook users shows that the percentage of female users is at a standstill since April 2011, staying at 33.5%. This is still lower than the global trend, where women constitute **roughly half** of Facebook users **(see Figure 16).**

Figure 16: Gender Breakdown of Facebook Users in Arab Countries* (Oct. 2011)

* Excluding Syria and Sudan. Due to US imposed technology sanctions on both countries, no data on demographic breakdown of Facebook users could be obtained.

Lebanon is still the most gender-balanced of the Arab countries, followed closely by Bahrain, Tunisia and Jordan, while at the other end of the spectrum Facebook users in Somalia, Yemen, Iraq and Mauritania are overwhelmingly male.

Language breakdown of Facebook users

Men and women in the Arab region seem to have similar preferences when it comes to language use on Facebook, although a slightly larger number of women than men prefer to use English, while the reverse is true for Arabic. French is the third most used language on Facebook by both men and women.**(Figure 17)**

Figure 17: Language Interface User Preference of Facebook Users in the Arab World (Gender Breakdown)
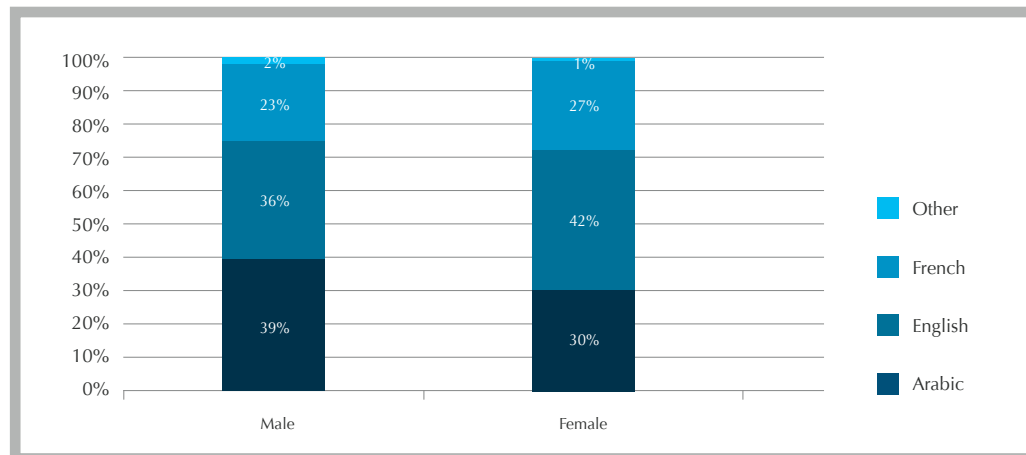
> **Men and women in the Arab region seem to have similar preferences when it comes to language use on Facebook, although a slightly larger number of women than men prefer to use English, while the reverse is true for Arabic.**
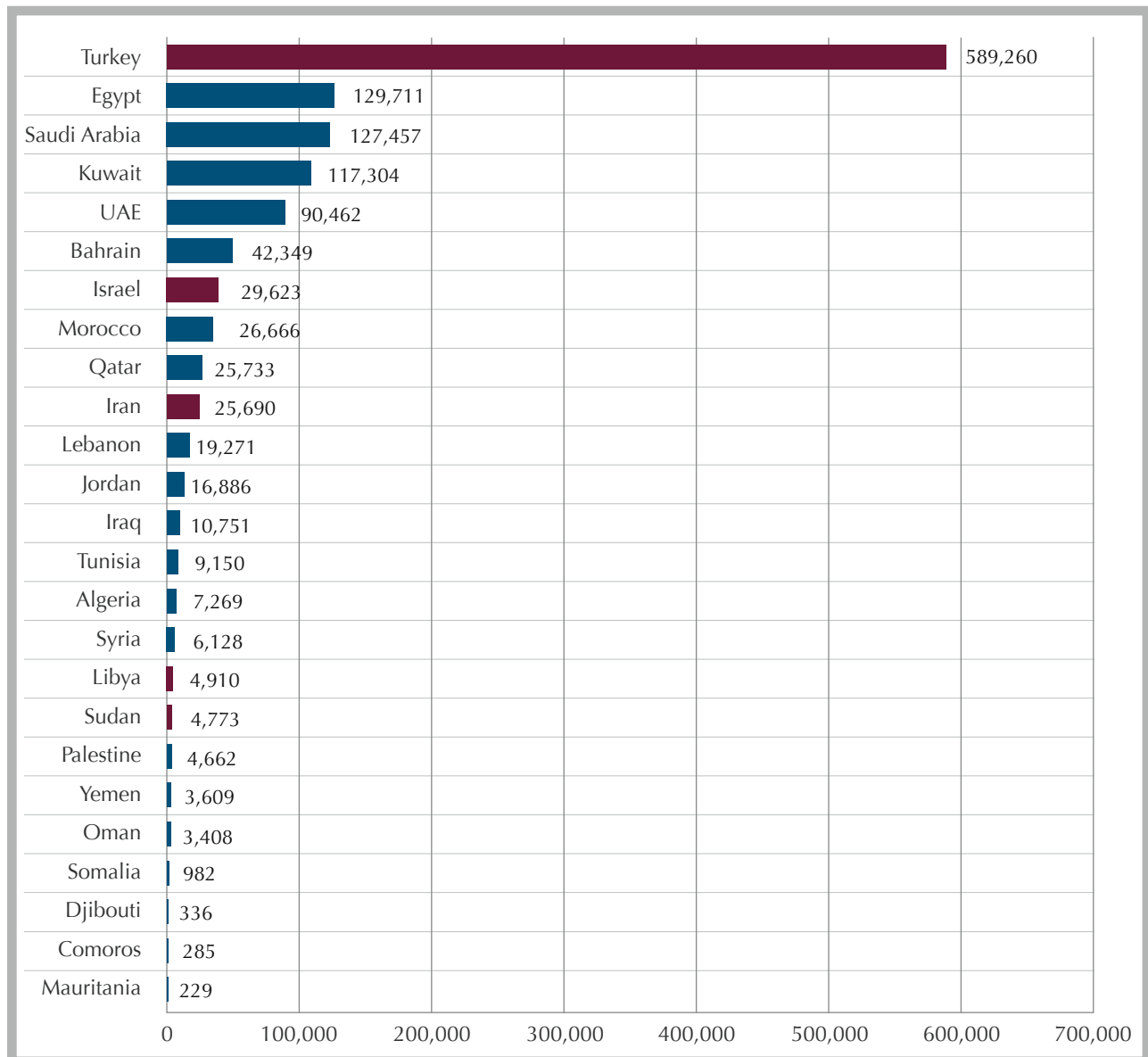
4. Mapping Twitter in the Arab World – Users, Tweets and Trends

The number of active Twitter users grew to over 100 million by September 2011, tweeting 1 billion tweets every five days. As officially defined by Twitter, an "active user" is someone who logs in (but does not necessarily tweet) once a month.

Twitter penetration and uptake in the Arab region

The total number of active Twitter users, tweets and top trends in each of the 22 Arab countries (plus Iran, Israel and Turkey) over the month of September 2011 was estimated using a Twitter API (application programming interface) specially developed for this research. The methodology used is detailed in Annex 1. Briefly, it consists of sampling a certain number of Twitter users in each country captured across the month of September, and using this sample to estimate the active Twitter population (active in this case being defined as someone who has tweeted at least once a month[30]).

Figure 18: Number of Active Twitter Users in the Arab Region plus Iran, Israel and Turkey (Average number for Sept. 2011)

Country	Active Twitter Users
Turkey	589,260
Egypt	129,711
Saudi Arabia	127,457
Kuwait	117,304
UAE	90,462
Bahrain	42,349
Israel	29,623
Morocco	26,666
Qatar	25,733
Iran	25,690
Lebanon	19,271
Jordan	16,886
Iraq	10,751
Tunisia	9,150
Algeria	7,269
Syria	6,128
Libya	4,910
Sudan	4,773
Palestine	4,662
Yemen	3,609
Oman	3,408
Somalia	982
Djibouti	336
Comoros	285
Mauritania	229

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[30] Based on Twitter's official definition of active users: http://blog.twitter.com/2011/09/one-hundred-million-voices.html

- The estimated number of active Twitter users in the Arab region at the end of September 2011 was **652,333**.

- The estimated number of tweets generated in the Arab region in September 2011 by these "active users" was **36,889,500** tweets. The estimated number of daily tweets is **1,229,650 tweets per day**, or **854 tweets a minute, or roughly 14 tweets every second.**

- The most popular trending hashtags across the Arab region in September were **#bahrain** (with 510,000 mentions in the tweets generated during this period) **#egypt** (with 310,000 mentions), **#syria** (with 220,000 mentions), **#feb14** and **#14feb** (with a combined 153,000 mentions), and **#kuwait** (with 140,000 mentions)

As with Facebook, Turkey dominates in the number of Twitter users, with 589,260 users, followed by the Egypt, which leads the Arab countries with 129,711 Twitter users (see Figure 18). The top five Arab countries in terms of number of Twitter users are Egypt, Saudi Arabia and Kuwait, UAE and Bahrain.

When it comes to Twitter penetration as a percentage of population on a regional level, Bahrain and Kuwait lead the way with 3.43% and 3.37% Twitter penetration rates respectively. Contrary to Facebook, the top five countries in terms of Twitter penetration are all from the GCC, with Qatar, UAE, and Saudi Arabia taking the remaining slots (Figure 19). Arab countries can be divided into the following categories:

1. **High Penetration:** These countries' Twitter user penetration is above 3%[31], indicating a high use of Twitter in their societies relative to other Arab countries.

2. **Emerging countries:** These countries' Twitter user penetration ranges from 1%-2%, indicating a medium penetration of Twitter users relative to other Arab countries.

3. **Developing users:** These countries have Twitter user penetration rates are under 1%, indicating room for growth.

Figure 19: Twitter Penetration in the Arab Region plus Iran, Israel and Turkey (Average for Sept. 2011)*
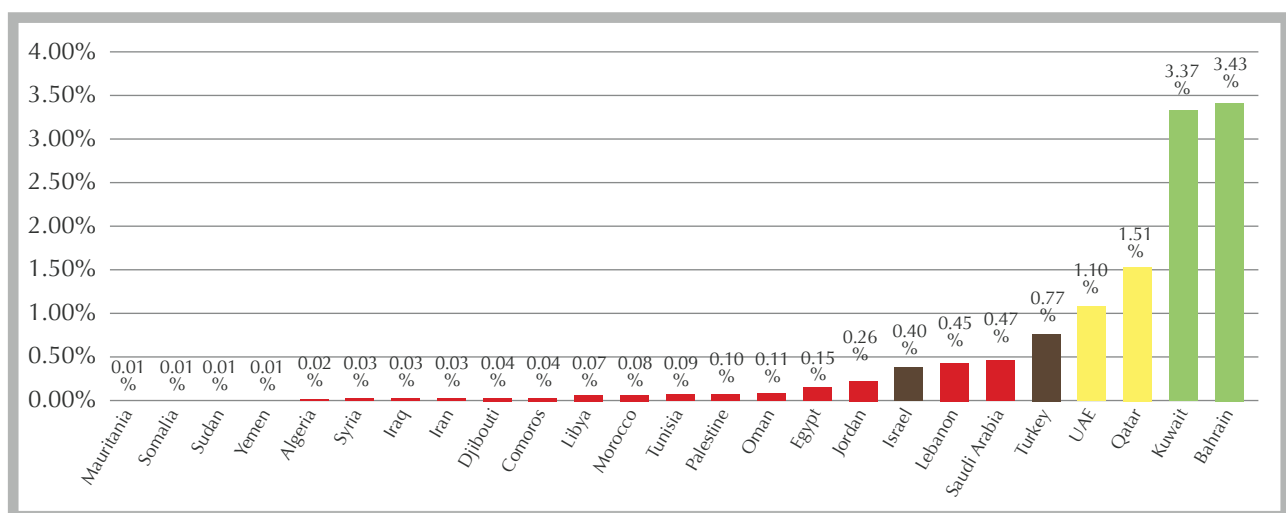
* 2011 populations, from United Nations ILO Department of Statistics, http://laborsta.ilo.org/, except GCC countries (which used official GCC population data).

As with Facebook penetration, the populations used in calculating Twitter penetration are based on ILO statistics, except for the GCC countries, for which more recent official GCC population numbers were used.

Volume of tweets in the Arab region

The volume of tweets from each country was estimated during the month of September **(see Figure 20)**, and calculated as a percentage of total tweets in the Arab region over this time period **(Figure 21)**.

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[31] This cutoff percentage is lower than the previous reports (3%-5%), due to the use of official GCC population numbers instead of ILO numbers.
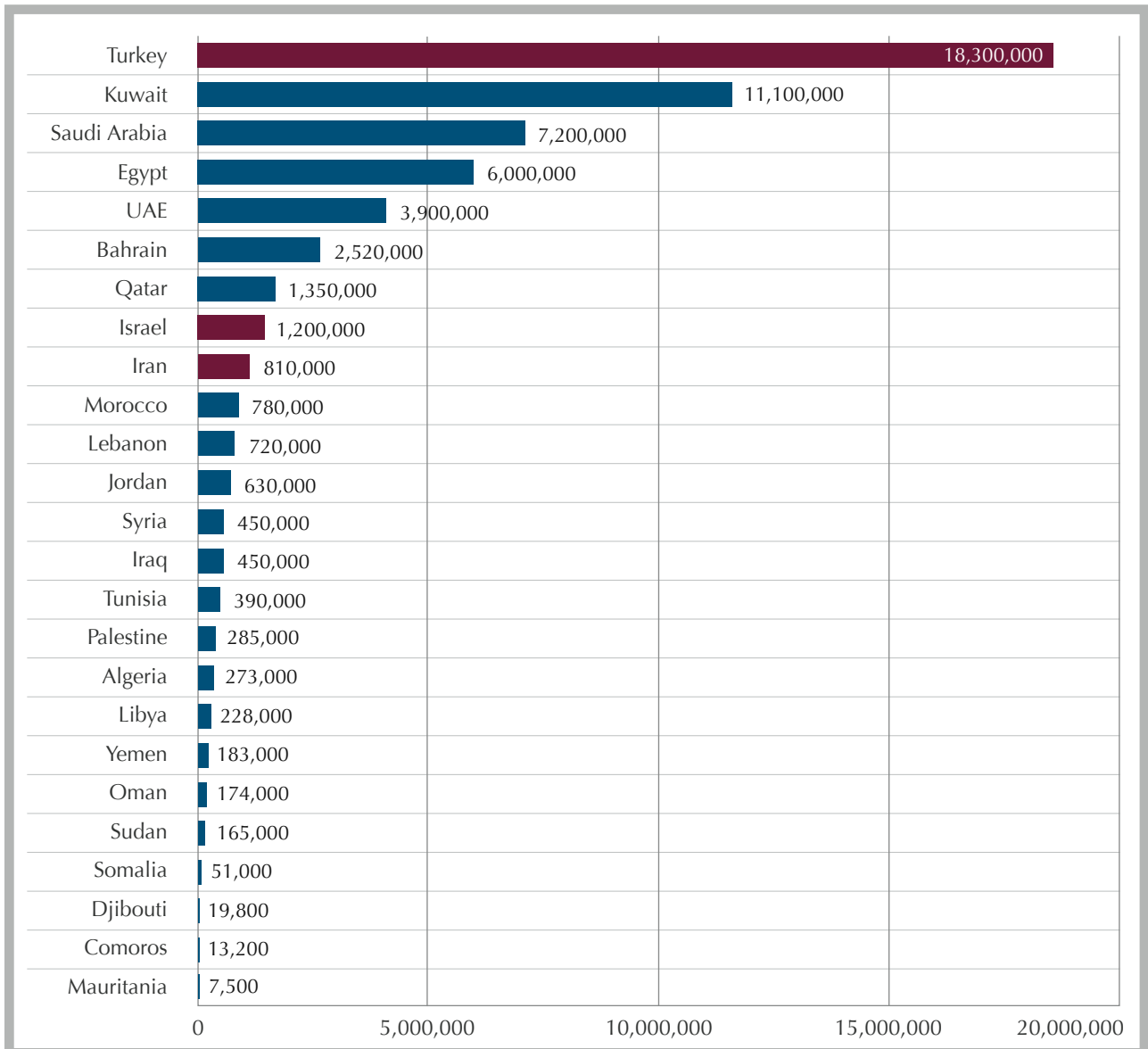
The top five generators of tweets in the Arab region are Kuwait, Saudi Arabia, Egypt, UAE, and Bahrain, who also have the top five largest active Twitter populations in the region (although not in the same ranking). To a certain extent, therefore, the size of a country's active Twitter population correlates with the volume of tweets it generates. **Figure 21** shows that 70% of tweets in September 2011 were generated by these five countries.

Figure 20: Number of Tweets in the Arab Region plus Iran, Israel and Turkey (Sept. 1-30, 2011)

Country	Number of Tweets
Turkey	18,300,000
Kuwait	11,100,000
Saudi Arabia	7,200,000
Egypt	6,000,000
UAE	3,900,000
Bahrain	2,520,000
Qatar	1,350,000
Israel	1,200,000
Iran	810,000
Morocco	780,000
Lebanon	720,000
Jordan	630,000
Syria	450,000
Iraq	450,000
Tunisia	390,000
Palestine	285,000
Algeria	273,000
Libya	228,000
Yemen	183,000
Oman	174,000
Sudan	165,000
Somalia	51,000
Djibouti	19,800
Comoros	13,200
Mauritania	7,500

Top Twitter trends in the Arab region

The top trends for each country were estimated during the month of September 2011. Across the region, the top five trending hashtags are illustrated in **Figure 22** below.

Figure 21: Percentage of Tweets in the Arab Region (Sept. 1-30, 2011)
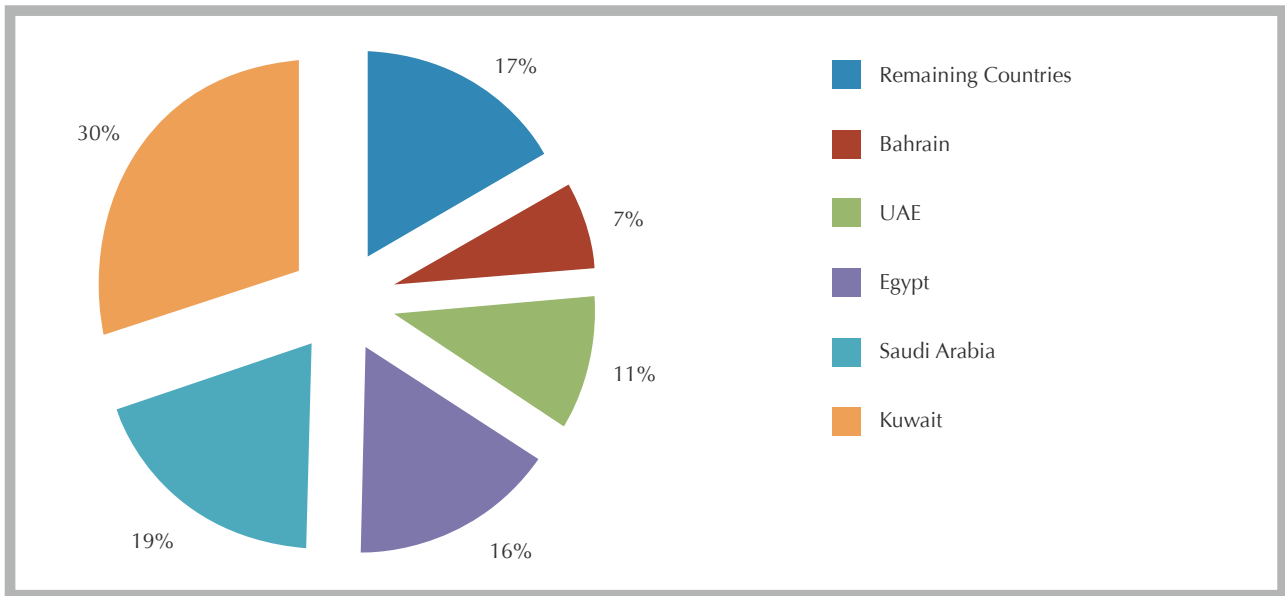
Language breakdown of Twitter users

English and Arabic are the dominant languages on Twitter, both used about equally by the Twitter population in the region (45% and 48% respectively). Looking at the top Twitter users in the region, we can see this is the case in Egypt, with some GCC countries (Saudi Arabia, Kuwait and Bahrain) favoring Arabic. The UAE, however, differs, with 74% of users tweeting in English **(see Figure 23)**.

Figure 22: Top Twitter Trends in the Arab Region in Sept. 2011 (number of mentions)
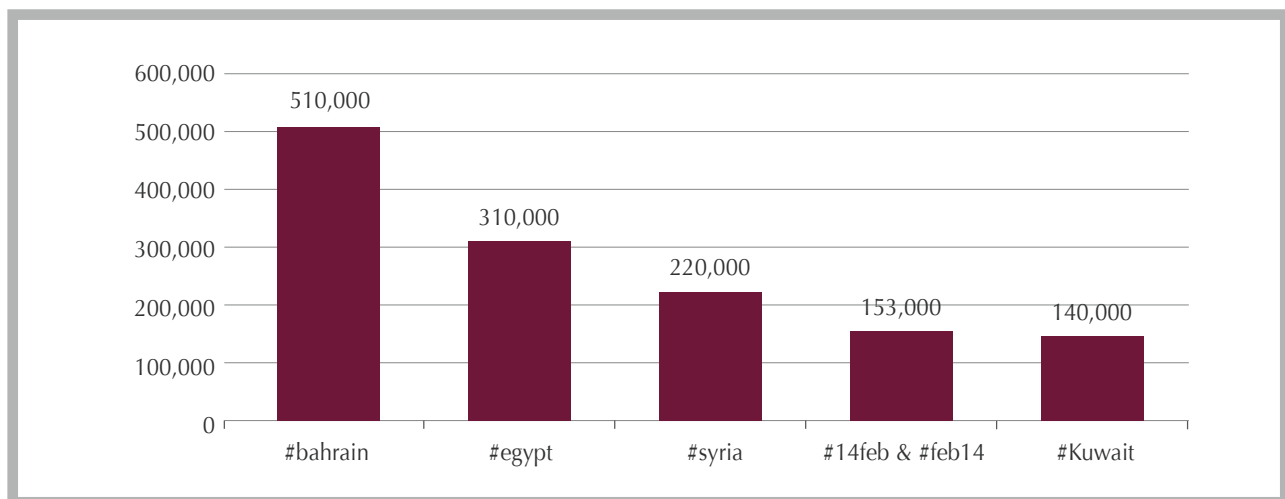
Figure 23: Percentage of Tweets by Language – Top Five Twitter Populations (Sept. 2011)
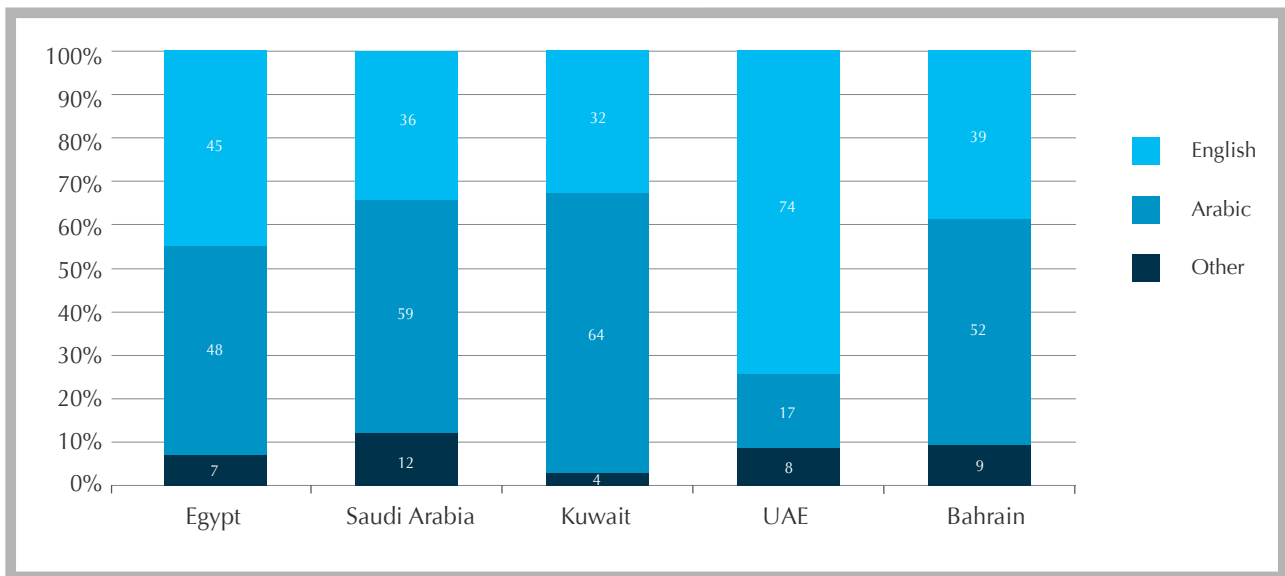
Regional Overview of Facebook and Twitter

- **_Facebook_** has seen exponential growth in the Arab region, growing by over 68% in less than a year since January. Country rankings have changed significantly, with some GCC countries like Qatar and Bahrain falling out of the top five ranking, while Levant countries like Lebanon, Syria and Jordan saw their way in through significant growth in the number of their Facebook users.

- Female participation in Facebook usage remains low, at 33.5%, as compared with the global female percentage of Facebook users (roughly 50%).

- Youth between 15 and 29 years of age continue to drive the growth of Facebook in the region, comprising 70% of Facebook users.

- When it comes to **_Twitter_** usage, The GCC countries (specifically, Saudi Arabia, Bahrain, the UAE and Kuwait) along with Egypt dominate the top five countries in terms of both Twitter users and volume of tweets.[32]

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[32] Generally, the volume of tweets and number of Twitter users are correlated, indicating that the estimated Twitter users across the region are all quite active (tweeting average just under twice a day).

Annex 1

Methodology

Facebook data

The number of Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey, was collected periodically between April 5 and October 1, 2011, in the following age brackets—youth (15-29), and adults (30 and over).

Raw data on for all Arab countries was collected and aggregated based on Facebook's official data (Group A), excluding Syria, Sudan and Iran (Group B), for which data was extracted from a source other than Facebook. Due to US imposed technology export sanctions, no data on the number of Facebook users in Syria, Sudan and Iran is available. The actual numbers of Facebook users in Syria and Iran (in November 2007 and June 2008, respectively) were located through online research; no such data for Sudan was found. For that reason, all Facebook data on Sudan was estimated using the daily growth rate of Arab users (calculated from the Group A countries between January 5 and April 5, 2011). This rate was used to calculate the number of users in group B, for consistency's sake, to ensure a smaller error margin than using the growth rates of similar countries for each individual country. For Syria, specifically, after February 7, 2011, when social media sites were no longer banned in the country, a different daily growth rate was used to reflect the ensuing surge in growth number of Facebook users. This rate was based on the average daily growth rate in Yemen, which has a similar ICT and socio-economic indicators as Syria and witnessed an uprising influenced by Facebook and other social media networks as well. In addition, a one-off factor was added to the calculation of the Syria growth rate after lifting the ban on social media website on February 7, 2011. This was estimated based on the surge in number of Facebook users in Egypt after a similar Internet ban was lifted on 2nd February 2011.

It should be noted that for all charts in this paper, the numbers of Facebook users in Syria, Sudan and Iran are estimates, while the numbers for remaining countries were compiled based on official Facebook data.

Twitter data

The number of Twitter users, number of tweets, and top trends in all 22 Arab countries, in addition to Iran, Israel and Turkey, was estimated between September 1st and 30th, 2011 by sampling **109,000 Twitter users** and **327,000 tweets**. The study was conducted using a specially developed Twitter API.

Two sampling methods were used:

1. Trend & volume data was collected by sampling 1% of the whole of Twitter traffic, and filtering for location.

2. Users were sampled by randomly inspecting user ID numbers. This allows us to find information on both active and inactive users.

The population estimates come from combining these two data sources (sample (2) gives a picture of user behavior, which helps assess the fraction of the population that was picked up in sample (1)). An estimated correction was applied for un-locatable users.

Data collection was done by filtering the Twitter sample stream (which provides 1% of all tweets as they happen) for tweets from the right country. An unbiased distribution of tweet frequency was obtained by random sampling of the user space.

Geo Location (identifying the country from a location) was done by filtering tweets with location information using a mixture of Yahoo and Google's geolocation services, plus a local database & some extra clean-up for mistakes by one of these services.

Population estimation was done by estimating the probability of seeing a given user appear in the stream, given the sampling period, tweet-frequency distribution, and the stream behavior (witnessed in the 1% sample of tweets; assumed unbiased). A second correction was applied for un-locatable users.

Disclaimer:

There are variations in the Twitter data captured for the 2nd and 3rd (current) Arab Social Media Reports. These changes partially correspond to actual growth in number of Twitter users and volume of tweets in the region. They are also a reflection of several changes made in the data collection and analysis process, mainly:

1. Change in data collection: The sampling process for the 3rd report was a forward-running survey, collecting data from the Twitter stream (which contains 1% of all Twitter data as it is generated), whereas the sampling process in 2nd report was a backward-running survey, gathering historical data, dependant on Twitter's search API, and was therefore 'noisier' and not as accurate as filtering the Twitter stream. A forward-running survey was not an option in the 2nd report since the data (pertinent to the Arab spring) was historical data

2. Change in definition of active Twitter user: In line with a recently used Twitter's official definition (of a user who logs in once a month), the active user definition in this report is someone who tweets at least once a month. Because of our sampling process in the previous report, the active user was defined as someone who tweets once every two weeks

3. Change in data capture: From a technical point of view, Twitter is constantly evolving and changing the manner in which people and APIs can capture and analyze data, which makes it difficult to replicate the same sampling process twice.

Annex 2

The content of Annex is available exclusively for members of the ASMR community online on the ASMR website:

www.ArabSocialMediaReport.com

Registration (at no cost) will give you access to the following datasets, in addition to unpublished charts:

Table: Facebook Users and Country Populations in the Arab World:

Country	Number of Facebook users (10/1/2011)	Population*	Facebook Penetration (%)	Number of New Facebook users since 1/5/2011 (%)	Growth in number of Facebook users since 1/5/2011 (%)	New Facebook users since 1/5/2011 (as % of population)

Table: Volume of Tweets and Twitter Users in the Arab Region throughout Spetember 2011

Country	Estimated Number of Twitter Users (Avg.through September, 2011)	Population*	Twitter penetration (Avg.through September, 2011)	Estimated Twitter Volume (Avg. through September 30th, 2011)

Table: Facebook, Twitter, Internet and Mobile Subscription Rates in the Arab Region

Country	Estimated Number of Twitter Users (Avg. through September, 2011)	Twitter penetration (%)*	Number of Facebook users (10/1/2011)	Facebook penetration (%)*	Internet users per 100**	Mobile subscriptions per 100**

About the Governance and Innovation Program

The Governance and Innovation Program at DSG conducts research and programmatic activities focusing on policies for government innovation and development through information technologies in the Arab states. The objectives of the program are aligned with regional objectives towards nurturing a culture of innovation in society, promoting participatory, inclusive and transparent government models; and enabling more responsive and efficient governance through effective adoption of information technologies.

The program works on three tracks:

1. **Policy and Scholarly Research:** Conducting research focusing on government policies and societal transformation through technological innovation in the Arab region.

2. **Policy Advisory:** The ultimate objective of the Program is to inform present and future Arab policy makers in assessing the impact of the ongoing transformations in their societies and governments; and to help develop locally fitting policies for future governance initiatives.

3. **Regional Development Activities:** The Program brings together regional and international networks of practitioners and scholars working in related areas through programmatic and educational activities, in order to encourage proactive regional knowledge sharing and bridge the gap between policy and research.

About the Gender and Public Policy Program

The Gender and Public Policy Program aims to support theoretically and methodologically rigorous research that analyzes gender gaps and informs public policy in the Arab world. Today, it has become a nexus through which research projects, conferences, training and workshops, policy debates and academic programs on gender concerns are engaged. The program contributes to the academic scholarship on gender and public policy in the Arab world while simultaneously incorporating gender perspectives on public policy into the education of future and current leaders taught and trained at the Dubai School of Government and beyond. The program forges partnerships with academic institutions, private sector organizations, government agencies, and policy makers to act as a platform for influencing public policies affecting the lives of women and men in the Arab world.

About the Dubai School of Government

The Dubai School of Government (DSG) is a research and teaching institution focusing on public policy in the Arab world. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, in cooperation with the Harvard Kennedy School, DSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Dubai School of Government also collaborates with regional and global institutions in its research and training programs. In addition, the School organizes policy forums and international conferences to facilitate the exchange of ideas and promote critical debate on public policy in the Arab world. The School is committed to the creation of knowledge, the dissemination of best practice and the training of policy makers in the Arab world. To achieve this mission, the School is developing strong capabilities to support research and teaching programs including

*   applied research in public policy and management;

*   master's degrees in public policy and public administration;

*   executive education for senior officials and executives; and,

*   knowledge forums for scholars and policy makers.