



Arab Social Media Report



Citizen Engagement and Public Services in the Arab World: The Potential of Social Media

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The Arab Social Media Report series, produced by the Governance and Innovation Program aims to inform a better understanding of the impact of social media growth on development and governance in the Arab region by exploring the following key 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, the findings of the series shed light on the role social media is playing in the transformations taking place in Arab societies.

For additional datasets and charts unpublished in this report, join the ASMR community and register (at no cost) online at: www.ArabSocialMediaReport.com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 group through the website. For questions or media enquiries please direct mails to the authors at: socialmedia@dsg.ac.ae

Overview

Around the world, trust in government is at an all-time low. Limited accountability, lack of transparency and low quality of public services are coupled with unprecedented levels of access to information, informed citizens, empowered civil society structures and rising citizens expectations; all just a few of the reasons why the public sector globally is in the crosshair.

The Arab World is burdened by varying degrees of these challenges on regional and country levels. Most importantly, the public sector in a majority of Arab countries continues to suffer from mounting deficiencies in terms of quality, efficiency and accessibility of government services¹. Meanwhile, the ever-growing connectivity² in the Arab world has paved the way for the emergence of varying forms of networked societies where individuals and groups are firmly connected -and empowered- by a medium of free-flowing information, ideas and knowledge. This increased connectivity has reached a critical mass of the population in the Arab region, both in terms of expanding physical communication channels such as computing devices, smart phones and other internet-enabled 'things', as well as informational channels in the form of affordable internet subscriptions and an arsenal of social media accounts. With internet users in the Arab region finally reaching the global average in 2014 for the first time ever - a developmental milestone for the region - suddenly this critical mass has gained access to massive volumes of data and information on every facet of life in their region and beyond. Coupled with wide scale political instability in many Arab counties, this new found 'awareness' is increasingly leading to rising expectations of

government services by citizens.

These new realities empowered large number of individuals and groups in the region to proactively utilize technological and informational means to voice opinions, make suggestions, give feedback as well as proactively innovate. These new transformations promise to enable individuals and organizations in the region to co-design, co-produce and deliver better or new public services, overcoming many shortcomings in the Arab public sector and filling the gaps left by the state. These socio-technological transformations have flattened informational hierarchies, changed trust models both in society and between citizens and government, re-defined many leadership characteristics, altered power structures and transformed the landscape of public service and policy making cycles significantly. Many governments in the Arab region realize today that they need to proactively engage citizens and partner with civil society structures as well as with businesses, to find innovative ways for delivering public services that are inclusive, citizen-centric, responsive, timely and cost-effective. With regards to service delivery, the unintended side-effects of the 'new public management' era³ and the documented limitations in the 'electronic government' era⁴ provide invaluable lessons for policy makers in the ongoing 'open government' and 'social media' era.

With around 82 million Arab users today at 22 percent penetration rates regionally, social media is already providing the medium for overcoming many of the monumental barriers for re-inventing public service in the Arab world. With around 41

1. The Arab Government Services Outlook 2014. The 2nd Government Summit. Dubai: The Governance and Innovation Program, Mohammed Bin Rashid School of Government - Available on: www.ArabSocialMediaReport.com
2. The Arab World Online 2014: Trends in Internet and Mobile Usage in the Arab Region. Dubai: The Governance and Innovation Program, Mohammed Bin Rashid School of Government - Available on: www.ArabSocialMediaReport.com
3. SALEM, F. & JARRAR, Y. 2010. Government 2.0? Technology, Trust and Collaboration in the UAE Public Sector. Policy and Internet Journal, 2, 34.
4. Exploring E-Government Barriers in the Arab States. The Dubai Initiative, Harvard Kennedy School of Government. Dubai School of Government - Available on: http://belfercenter.hks.harvard.edu/publication/17327/exploring_egovernment_barriers_in_the_arab_states.html

percent Internet penetration and above 110 percent mobile penetration in the region, we are also witnessing a new wave of convergence, with online social media tools merging with smart phone messaging applications. For example, the largest social media platform; Facebook has recently merged with Whatsapp, one of the widest used smart phone messaging platform. This meant that Facebook now has access to new datasets for 500 million users, majority of whom are already using Facebook. By the 2nd quarter of 2014, these users were exchanging 64 billion messages using their smartphones each day worldwide, up from 54 billion a day four months earlier⁵.

As with every new technological step forward, these changes are already opening a new era of opportunities for businesses and new channels for government engagement with citizens. Social media platforms are aggressively seeking better smart phone integration, as this is bringing new opportunities to develop location-based services, provide better customer experiences with merged identities and develop an 'always on' experience regardless of the technological channels the customers are using. In a region where mobile penetration is well above 100 percent, many governments have started taking advantage of such opportunities to provide innovative public services for citizens through a combination of smart phones and social media applications.

However, universal connectivity, critical mass of users, big data analysis tools coupled with ubiquitous penetration of smarter devices also give way to new risks, where misuse of personal data and information by governments, businesses and individuals becomes easier and more feasible than ever. These are some of the policy implications fixed at the radar screen of every

single government globally. As was the case in the early days of e-government development, adapting to these disruptive technological changes will eventually reach equilibrium where a regional and local 'right fit' will be achieved.

While we are still in a beginning of an era where technology is empowering citizens and allowing for real collaboration models with government entities, the Arab region is witnessing increased examples where the 'business case' for using social media for co-design, co-production and co-delivery of public services is taking place. The UAE government, for example, has initiated a first-of-its-kind social media brainstorming campaign with society to try to solve public service problems related to health and education, and engage with the public to come up with innovative ideas to re-design and co-deliver many of these services. This was coupled with several local and regional awards initiated by the government to reward innovation in public service delivery through smart devices and social media to "harness the positive potential of social media for the good of the Arab world"⁶.

How sustainable is this 'partnership' going to be? What boundaries will be set by the different sides for their role in this partnership? What are the policy implications for this new collaborative governance structure? How will different governments react and adapt? These are some of the questions that will clarify with time, while these new channels are institutionalized. However, what seems to be clear is that, until more formal citizen engagement channels emerge in Arab societies, social media will continue to play a significant role in enabling better citizen engagement, government responsiveness, increased accountability and wider forms of collaboration for enhancing delivery of public service in the Arab world.

5. Source: Whatsapp Inc. on Twitter - April 2014

6. See: <http://www.arabsocialmediaaward.ae/>

Introduction

The historic and on-going developmental challenges in the Arab region call for novel and collaborative responses by government institutions, private sector entities and civil society structures. On a global scale, technological innovations have been key enablers for more inclusive developmental responses, better governance models and, more recently, with the growth of social media usage in the Arab region, for inclusive public service delivery and policy formulation. The ever-increasing usage rates and the creative adoption of social media in the Arab region during recent pressing social, economic and political transformations have opened new horizons for multifaceted innovations by individuals and government entities. These realities have also unleashed new societal trends by different forces in Arab societies. Social media technologies today seem increasingly promising as key enablers of more inclusive service design and delivery through citizen engagement in the Arab region.

Over the past four years, the Arab Social Media Report Series, produced by the Governance and Innovation Program, explored growth and usage trends of social media in the Arab region and provided in depth analysis on the impact of these transformations on regional levels. The series has become the key source of quantitative research on social media's growth and usage trends in the Arab world for international organizations, academic sources and policy makers. Additionally, the Arab Social Media Report team conducted numerous exploratory qualitative surveys to enable better evaluation of regional perceptions, assess actual usage trends, policy implications and impact of social media in Arab societies. The findings of the six reports in the series revealed new transformations related to social and cultural changes, youth and women's empowerment, entrepreneurship and employment, media consumption behaviors, education and social learning, government adoption and the role in collective action. The sixth issue of the report aims to focus on the impact of social media use on citizen engagement and public service delivery in the Arab region.

The level of engagement between Arab government and their citizenry is limited, whether at the stages of service design or delivery. The information between government entities and their customers in the Arab region tend to largely flow one way; from government to citizens. Even when a limited level of engagement takes place, the positive impact is usually clear on levels of satisfaction and quality of services. For example, earlier regional research by the Governance and Innovation Program has highlighted a strong co-relation between citizen engagement during public service design cycles, and levels of satisfaction with their delivery. Across the Arab region, service ratings submitted by citizens who said that their governments regularly asked them for suggestions and input into the service design process were considerably higher than those submitted by their counterparts who said that they were never asked for input⁷.

Building on the findings of a previous research project conducted by the Governance and Innovation Program⁸, in this report, we conducted a large regional survey exploring the impact of social media on citizen engagement and public service delivery and design. It was clear that attitudes towards social media use by Arab governments for public service delivery were largely positive, as were the perceptions

7. The Arab Government Services Outlook 2014. The 2nd Government Summit. Dubai: The Governance and Innovation Program, Mohammed Bin Rashid School of Government – Available on: www.ArabSocialMediaReport.com

8. New Frontiers for Citizens Engagement: Impact of Social Media on Government Services in the UAE (2013). Dubai: The 1st Government Summit. The Governance and Innovation Program, Dubai School of Government - Available on: www.ArabSocialMediaReport.com

surrounding associated benefits, including increased service accessibility, improved quality of services, inclusiveness and reduced cost. Additionally, the survey revealed clear awareness among Arab public of related risks such as cyber security, negative participation, lack of proficiency by public entities and invalid information. However, actual usage of government social media pages by citizens to gather information on services or provide feedback proved surprisingly low - given citizens' heightened expectations of social media's benefits; a finding that could be directly linked to low levels of trust in government responsiveness. Government officials who do use social media platforms to engage with citizens in the Arab region, however, did report that their government entities are using it for exactly these two purposes. In addition to the regional survey, this edition of the report continues to provide regional statistics on social media platforms, including Facebook, Twitter and LinkedIn. The findings of the regional survey provided here aim to measure impact of social media users in the Arab World on public service design and delivery through citizen engagement; a topic that is closely linked with several critical policy and developmental questions in the region.

Social media has been growing rapidly in the Arab World since 2011 and has continued to do so over the past year. Globally, Facebook boasted 1.28 billion monthly active users (MAUs) by the end of the first quarter of 2014⁹, including companies, brands, and governments, with 1.01 billion of Facebook's monthly active users accessing it through smart mobile devices. Twitter has also seen similar strong growth globally, with 255 million monthly active users as of end of 1st quarter of 2014, with 198 million of them accessing the platform through mobile devices¹⁰. LinkedIn, too, has seen healthy growth in users this year. As of January, LinkedIn had over 300 million members¹¹, with 39 million of them being students and college graduates.

With these global highlights in mind, growth of social media usage in the Arab world has been equally strong, with the number of users increasing by 49% on Facebook, 54% on Twitter and 79% on LinkedIn since May 2013.

9. <http://newsroom.fb.com/company-info/>

10. <https://investor.twitterinc.com/releasedetail.cfm?ReleaseID=843245>

11. <http://press.linkedin.com/about>

2. Social Media and Citizen Engagement in the Arab Region:

This edition of the Arab Social Media Report primarily focuses on the role social media is playing in public service design and delivery through citizen engagement in the Arab region. The survey administered for this issue measures public attitudes and perceptions towards the adoption of social media by Arab governments for the purpose of public service delivery. Respondents were asked about their usage of government social media pages, their perceptions of benefits and risks involve in using social media for service delivery, perceptions towards possible improvements in government’s use of social media, and government and civic social media practices.

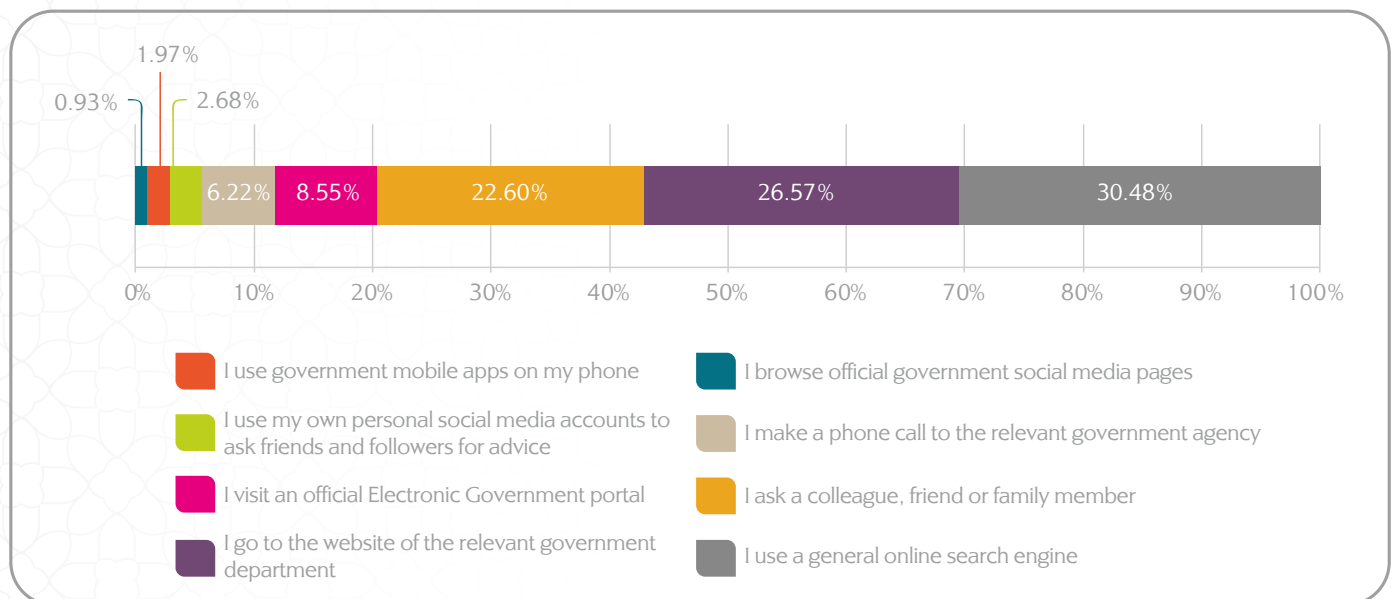
Overall, our findings show that perceptions about the use of social media were positive – 55% of respondents said they strongly support the use of social media by government for the design and delivery of public services. Respondents had high expectations of the benefits of using social media for citizen engagement for the purpose of improving service delivery. They agreed that social media made government entities and officials more accessible and collaboration more feasible. Additionally, respondents demonstrated a healthy level of awareness about the risks associated with social media use within the context of public services, including cyber security threats, administrative, regulatory and resource limitations. Perceptions of risks and benefits were largely universal and did not vary between demographic groups.

2.1 Social Media, Information and Feedback on Government Services

Only 2% of respondents reported visiting official social media pages or using their personal social media accounts as a first resort for finding information on public services in the Arab World. Information on government services were mostly accessed through the use of Internet search engines such as Google or Yahoo, with 30% of respondents reporting this as their primary source of information. This was followed by accessing information directly from official government websites, with 27% of respondents reporting it as their first choice for information on public services (Figure 1). These results are expected given the ease of finding information through search engines; and the fact that a large number of government entities in the Arab region tend not to have social media presence.

Figure 1. Primary access choice when seeking information about government services

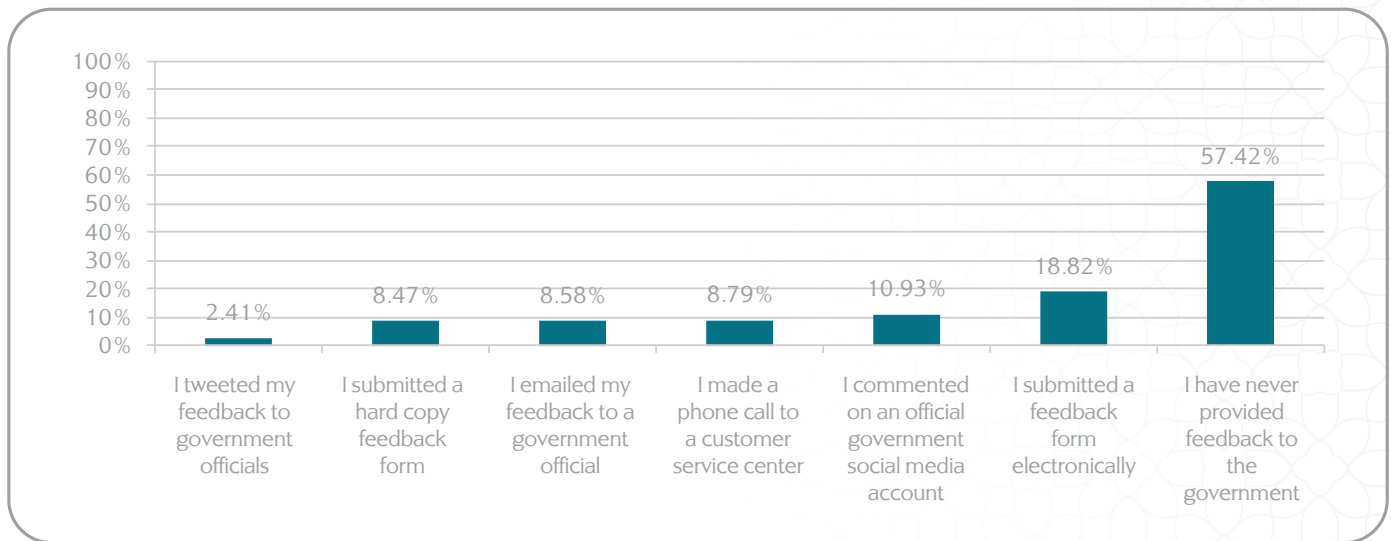
“When seeking information about government services, my first option usually is:”



Social media can be an accessible channel for providing feedback. However, when it comes to providing feedback on government services, there seems to be several barriers for citizens to do so in the Arab region. A majority (57%) of respondents indicated that they have never done so, while a large minority (43%) of respondents in this survey indicated that they had at one point provided feedback on government services (Figure 2).

Figure 2: Feedback to the government on service delivery

“Have you ever provided feedback to the government in your country of residence on service delivery?”



When available, ‘customers’ prefer to communicate with government entities using online methods. In our survey, the vast majority of respondents said that they submit their feedback to government online rather than through traditional methods such as customer call centers or hard copy feedback forms. Of those who provided feedback, most did so through online electronic forms (19% of all respondents) while 9% of respondents reported sending their feedback through email. Meanwhile, 11% of our respondents provided feedback through government social media pages, such as Facebook pages, while only 2% of respondents tweeted their feedback directly to a government official of government entity (Figure 2).

2.2 Usage Trends of Social Media for Public Services in the Arab World

2.2.1 Frequency of Visits to Government Social Media Pages

When asked how frequently they visit government social media pages 34% of respondents indicated visiting government social media pages several times a day, while 14% visited once a day . Meanwhile, 27% of respondents reported visiting government social media pages only rarely and 10% indicated that they never visited government social media pages (Figure 3). Cumulatively, 63% of respondents said that they visit social media pages at least once a week and 37% visit them rarely or never. Given that the availability of government social media channels are limited in most Arab countries; and while the survey did not distinguish between the different categories of government services, it is important to note here that many of the respondents may have been referring to specific high impact government social media accounts in their countries of residence rather than a commenting on government social media presence overall.

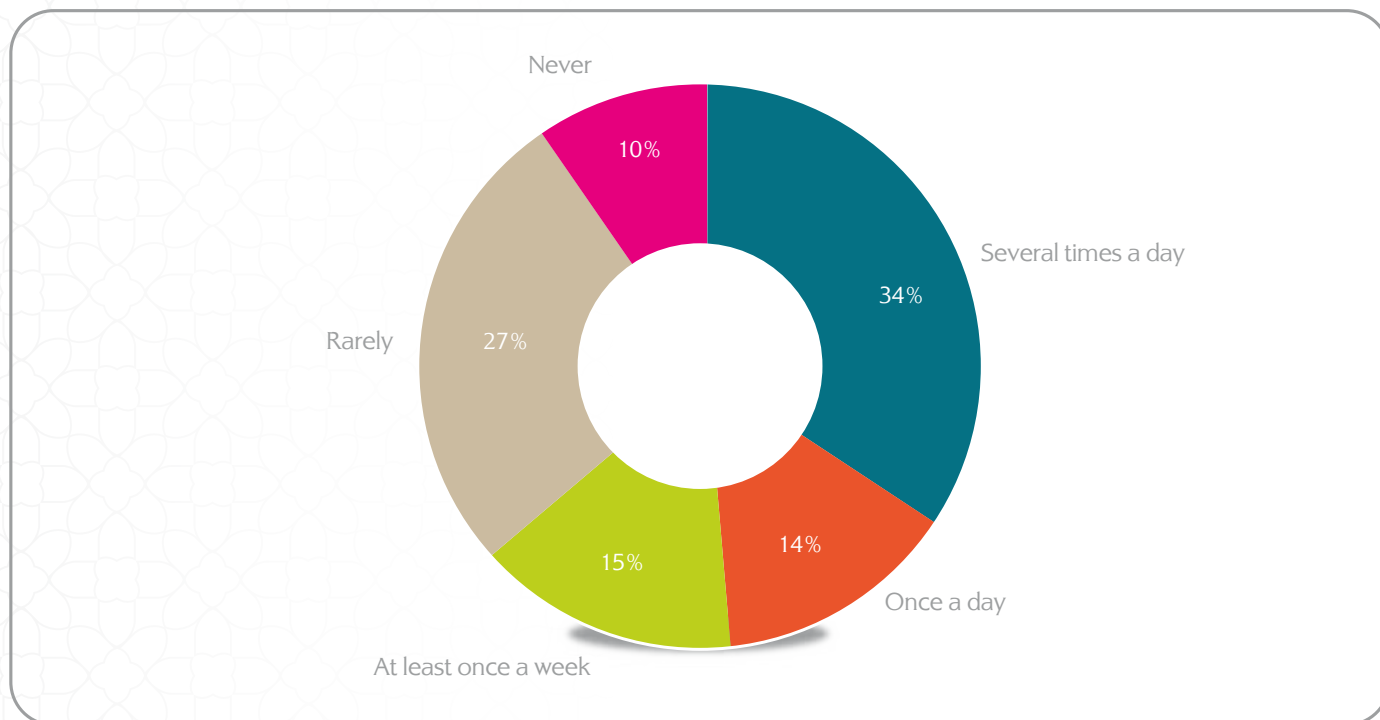


“I don’t use government social media pages because sometimes I do not have access to the internet or these pages don’t exist”

Survey Respondent

Figure 3: Frequency of accessing official government social media pages

“How frequently do you access official government social media pages, when available?”



34% of respondents indicated visiting government social media pages several times a day, while 14% visited once a day.

2.2.2 Utilization of Government Social Media Pages for Gathering Information and Giving Feedback on Services

Social media is still viewed as a one-way information source for the majority of those who utilize social media to interact with government. Of the 63% who do utilize government social media pages, the most common use by far (74%) was to access information on government services and entities (see Figure 4). This corresponds to just over half the survey respondents, so although many may have indicated (in Figure 1) that government social media pages were not the first choice for accessing information on public services, it is still a relevant information resource for the majority of people who frequent these social media pages.



The most common use of government social media pages (by over half the respondents) is to access information on government services and entities

Utilizing social media channels for communicating with government is still at an emerging stage in the Arab region. In our survey, the second most common use of government social media pages - at a much smaller percentage (10%) - was giving feedback on or evaluating government services. Coupled with the fact that a similarly small percentage of all respondents reported having given feedback on government services through social media (Figure 2), this indicates a fledgling willingness to use government social media pages for this purpose in the region, when available. A deterrent to increased usage could be lack of public trust in government's willingness or ability - to respond or act on feedback provided. There does, from what we can glean from a few comments by respondents to our survey, seem to be an expectation that government will be responsive on social media pages, given the nature of social media and what people have come to expect of it in terms of instant communication. Consequently, any perceived lack of responsiveness of the part of government could hinder customer uptake of social media to provide feedback. In other words, the level of trust in government entities' responsiveness usually builds overtime when entities provide a new public communication channel, such as an official social media account. Likewise, the level of trust can be damaged further when the government entity ignores or does not act on information, feedback and complaints received through such informational channels.

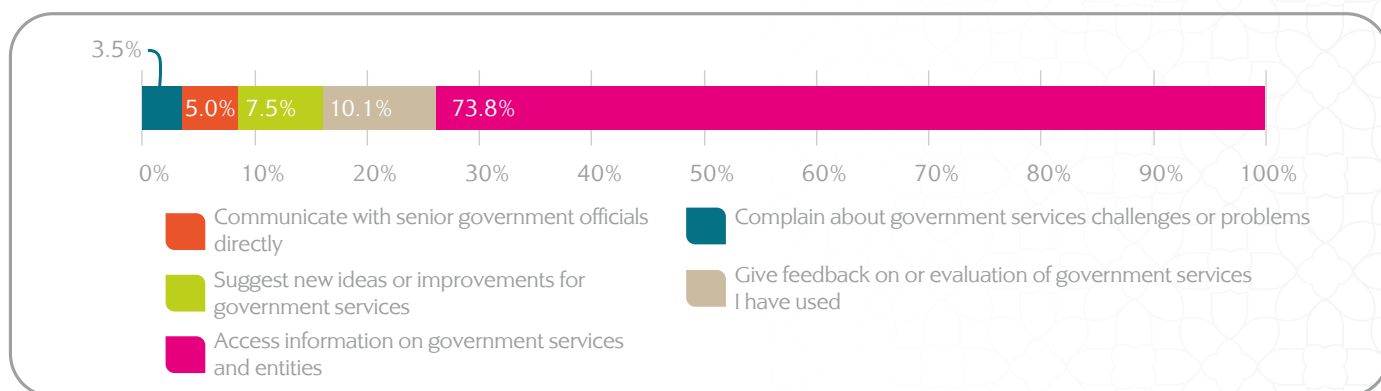


"I do not use social media pages for these purposes [feedback] because no one responds to queries on them"

Survey Respondent

Figure 4: Primary use of government social media pages

"My primary use of government social media pages is for the following purpose:"



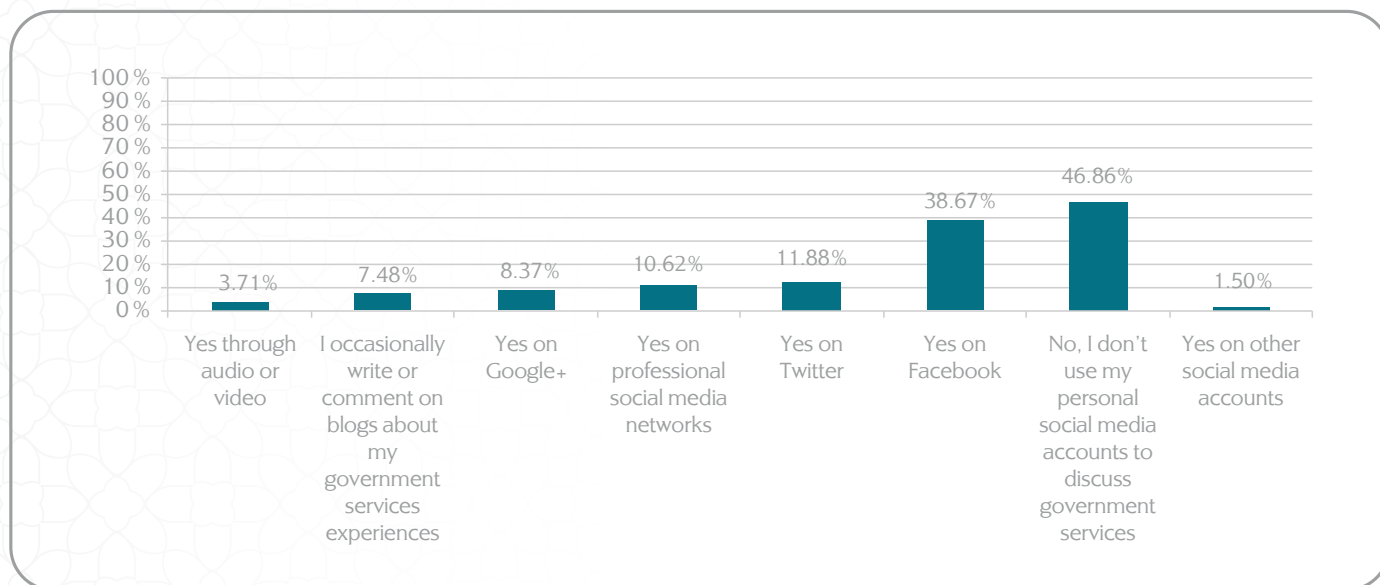
2.2.3 Discussing Government Services on Social Media

Almost half of respondents indicated that they do not use their personal social media accounts to discuss government service, while the other half indicated that they do but with differing frequency per platform. Facebook was the most frequently used platform for discussion (39%). Twitter was the second most frequently used but with a large gap between them: 12% of respondents use Twitter to discuss government services. Meanwhile, 11% of respondents indicated using professional social media sites, such as LinkedIn, and 8% used Google+, 8% used blogs and only 4% used audio or video social media channels such as Youtube (Figure 5). These findings could in fact be highlighting the preferred social media platforms used by governments in the Arab region, or simply, they may be a reflection of the presence of government entities on different social media platforms in the Arab World.

“Half the respondents use their personal social media accounts to discuss government services”

Figure 5: Using personal social media accounts to discuss government services

“Do you use your personal social media accounts to discuss government services?”



2.3 Regional Readiness for Utilizing Social Media in Public Service Design and Delivery

2.3.1 What are the Benefits?

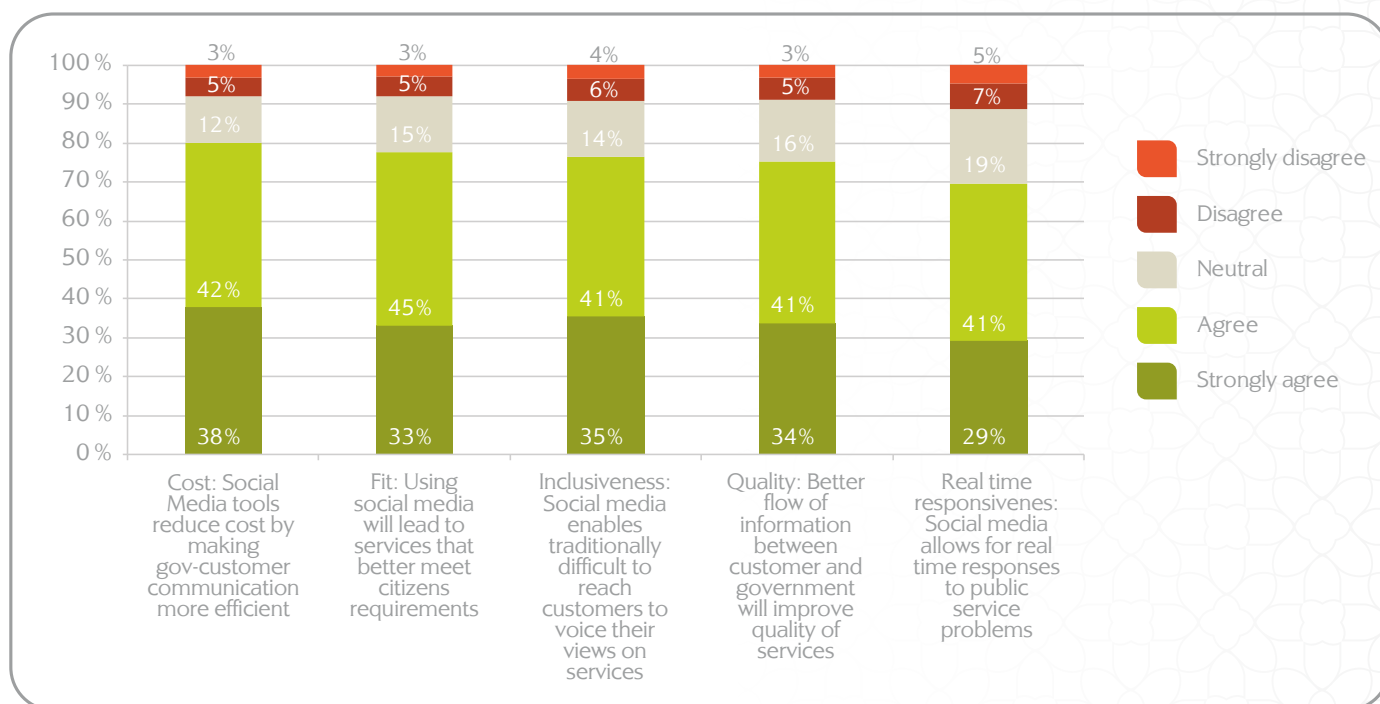
Overall, respondents agreed to general statements about the benefits of using social media for service design and delivery. In particular, 79% of respondents agreed that social media implementation would reduce service delivery costs, 78% agreed that it will make government services better suited to meet the needs of customers, 76% agreed that it would lead to more inclusive service delivery, and 75% agreed that it would improve the quality of service delivery (Figure 6). As for indirect benefits, respondents were equally optimistic about the potential of utilizing social media in enabling innovation (77%), improving government understanding of customer needs (76%), building communities of practice (76%), and ultimately improving trust in government (72%) (Figure 7).



The positive perceptions of the value of using social media in service design and delivery are shared across the Arab countries

Overall, the positive perceptions of the value of using social media in service design and delivery are shared across the Arab countries. Breaking down responses by international classifications for country income showed little difference in the percentage of respondents who had very optimistic views of social media's benefit¹². Indeed, respondents from all country income classifications believed social media to be potentially transformative in the way they interact with government services in their countries of residence.

Figure 6: Direct or short-term benefits of using social media for services design and delivery



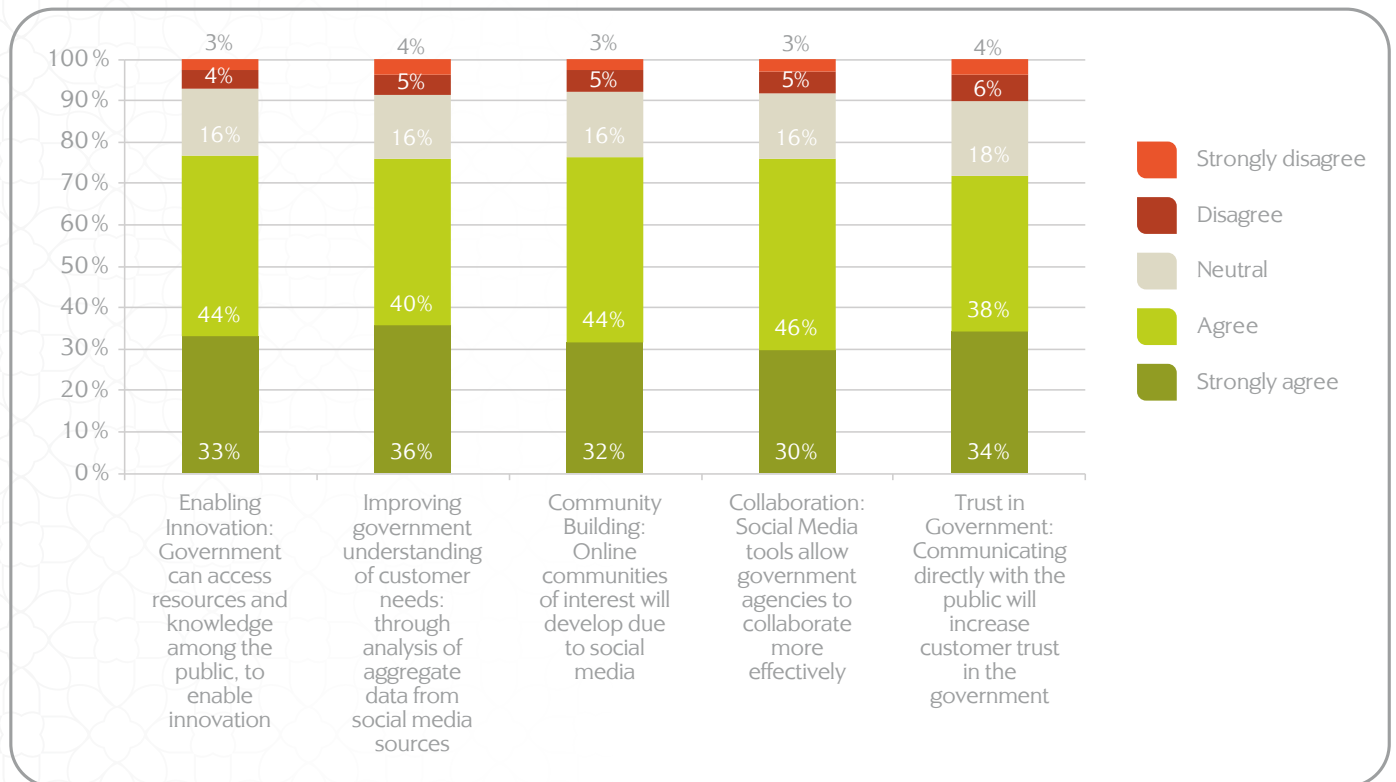
12. Based on World bank country income classifications <http://data.worldbank.org/about/country-classifications>



"[Social media will] save time and money for the citizen, and allow for public monitoring of government performance...this will be a transparent and unbiased monitoring"

Survey Respondent

Figure 7: Indirect or long-term benefits of using social media for services design and delivery

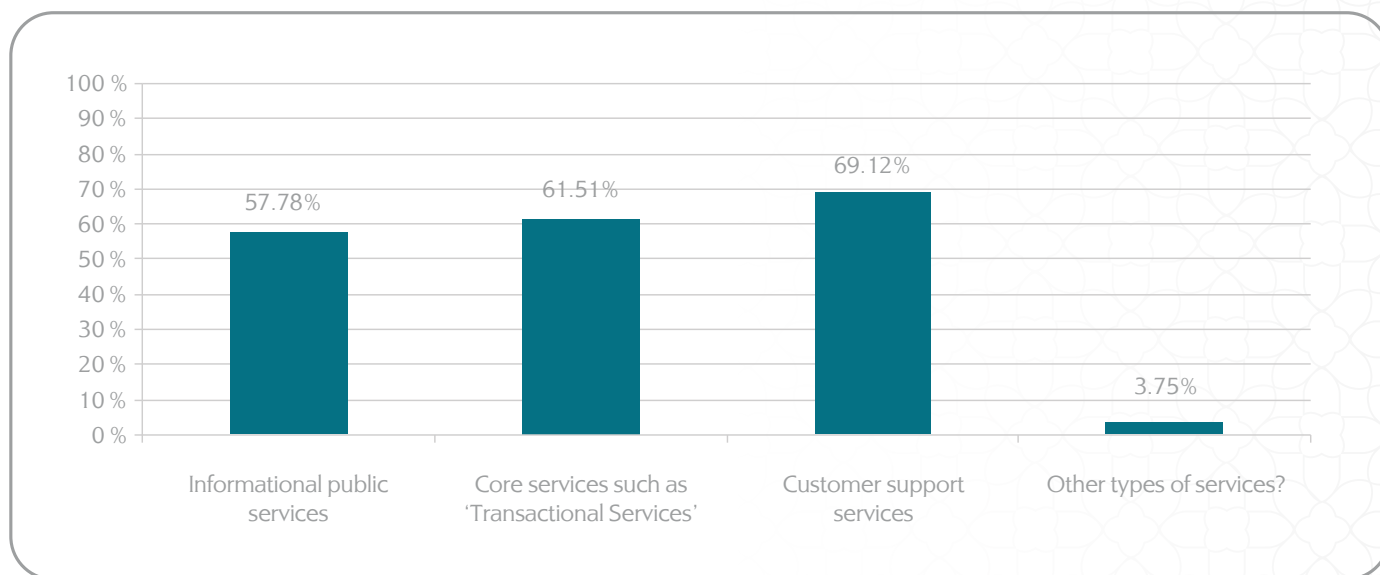


Respondents from all country income classifications believed social media to be potentially transformative for the way they interact with government services in their countries of residence

These findings are in line with regional trends indicating that social media users in the Arab region have overly positive expectations of the advantages of using social media, relative to other technologies¹³, in service design and delivery. These high expectations may point to a desire to be engaged in the service design and delivery process in general, as well as indicate a public perception that -with the lack of alternative official channels- social media could be a promising venue for such engagement. In addition to positive expectations of social media in service delivery, respondents in our survey seem to believe that benefits from social media adoption will affect all types of public services – 69% of respondents believe that customer support would be impacted, 62% believe that transactional services will be impacted and 60% believe that informational services will be impacted (Figure 8).

Figure 8: Impact of social media on specific types of government services

“What specific types of government services could the use of social media impact in your opinion?”



“My feedback will get lost in a sea of comments, as is the nature of social media”

Survey Respondent

13. Findings of the Arab Social Media Report series suggest that social media users in the Arab region have largely positive perceptions towards the use of social media in multiple aspects of their lives. The previous 5 editions of the Report are available on www.ArabSocialMediaReport.com

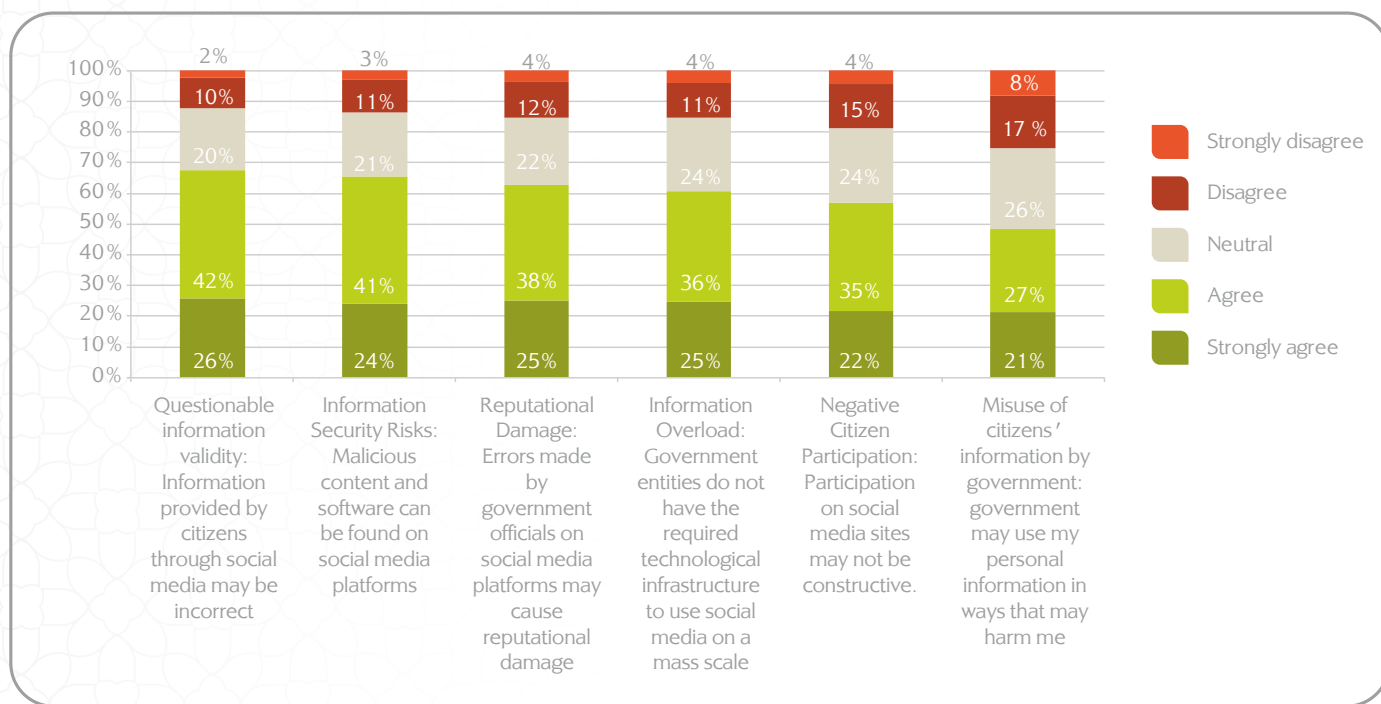
2.3.2 What are the Risks?

Respondents exhibited a general consciousness of the risks associated with social media implementation. The number one risk that emerged was that of questionable validity of information provided on social network platforms: 68% of respondents agreed that this was a risk. Malicious content and cyber security risks also received concurrence from a majority of respondents (65%). Additionally, a majority of respondents agreed that reputational damage, information overload, negative citizen participation and a shortage of adequately skilled or trained government employees were risks (Figure 9).

“The number one perceived risk associated with using social media for service design and delivery is that of questionable information validity on social networks’

Figure 9: Risks of using social media tools by government entities for service design and delivery

“Use of social media tools by government entities in my country of residence for service design and delivery may have the following risks, in my opinion:”



In addition to the risks highlighted in responses above, commentary by our respondents indicated limited levels of trust in government willingness and ability to infuse that feedback into the service delivery cycle. Furthermore, the ‘big data’ question was also present as many respondents were skeptical that the mass volume of information on social media would allow one’s voice to be heard or allow government to address grievances; a classical concern of government entities, even with the increased sophistication of existing social media analysis tools.

“Government might collect feedback from citizens, but does it do anything with it?’

Survey Respondent

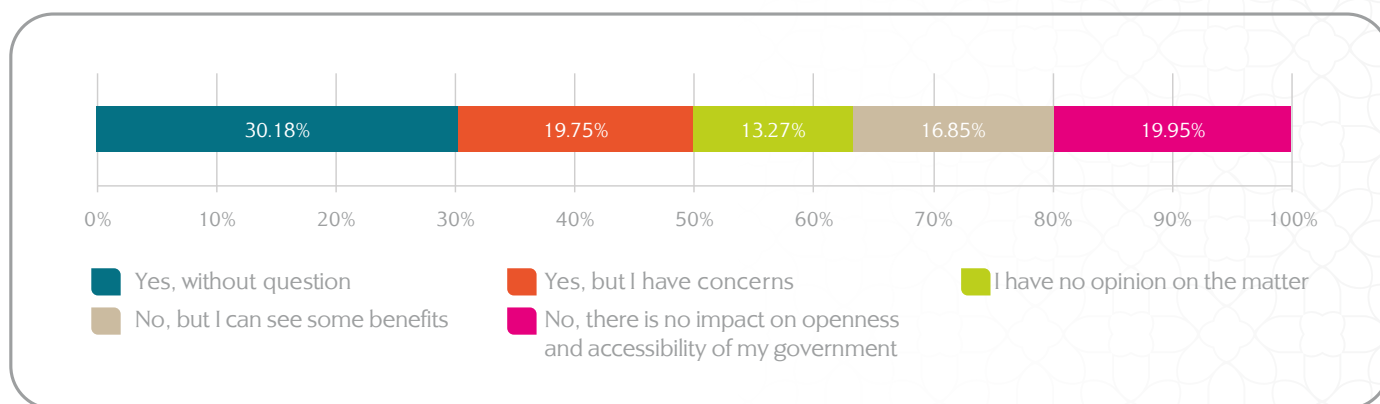
2.3.3 Government Accessibility

Respondents had a positive perception of social media's impact on government openness and accessibility with 50% of respondents indicating that they believe that social media has made their government more accessible, while, 37% indicated that they did not (Figure 10). The perception of accessibility differed between country income clusters, whereby a higher percentage (60%) of respondents living in high income countries believed that their government has become more accessible as a result of social media adoption than those living in middle income countries (an average of 40%) (Figure 11). Upon further analysis, respondents' comments showed that many still feel that there is a long way to go. Commenters indicated that open communication between governments and citizens as well as the possibility of open dialogue have indeed made governments in their country of residence more open but that this is not nearly enough. Many posited that there is a need for government to engage in more constructive conversations with citizens and then act on the feedback and suggestions it receives.

“there is a need for government to engage in more constructive conversations with citizens and then act on the feedback and suggestions it receives.”

Figure 10: Impact of adopting social media on government openness and accessibility

“In general, do you think that by adopting social media, your government is becoming more open and accessible?”

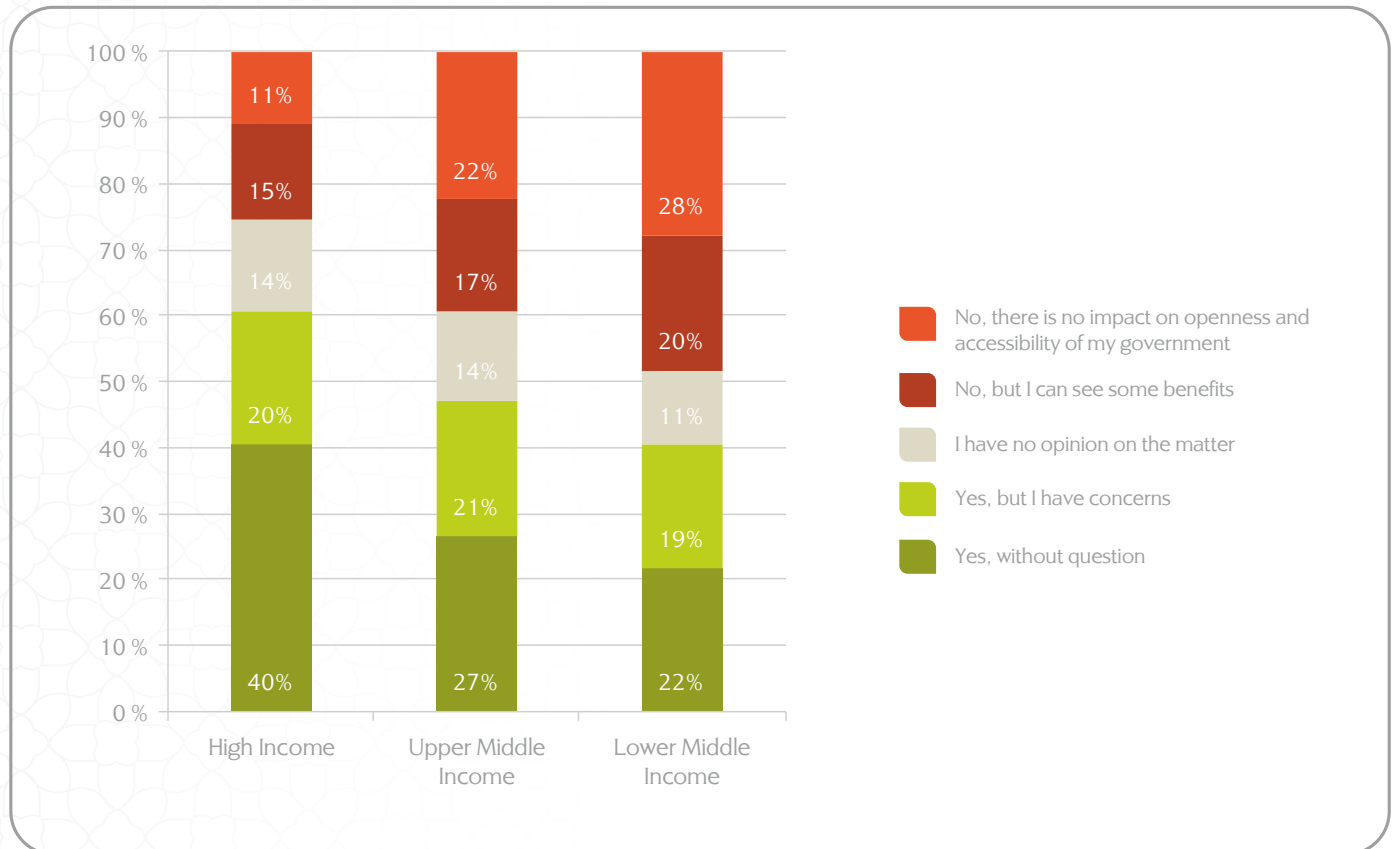


“There exists a kind of participation and openness, but it is not enough”

Survey Respondent

Figure 11 Impact of adopting social media on government openness and accessibility (breakdown by Country Income)

“In general, do you think that by adopting social media, your government is becoming more open and accessible?”



2.3.4 What Steps Should Arab Governments be Taking?

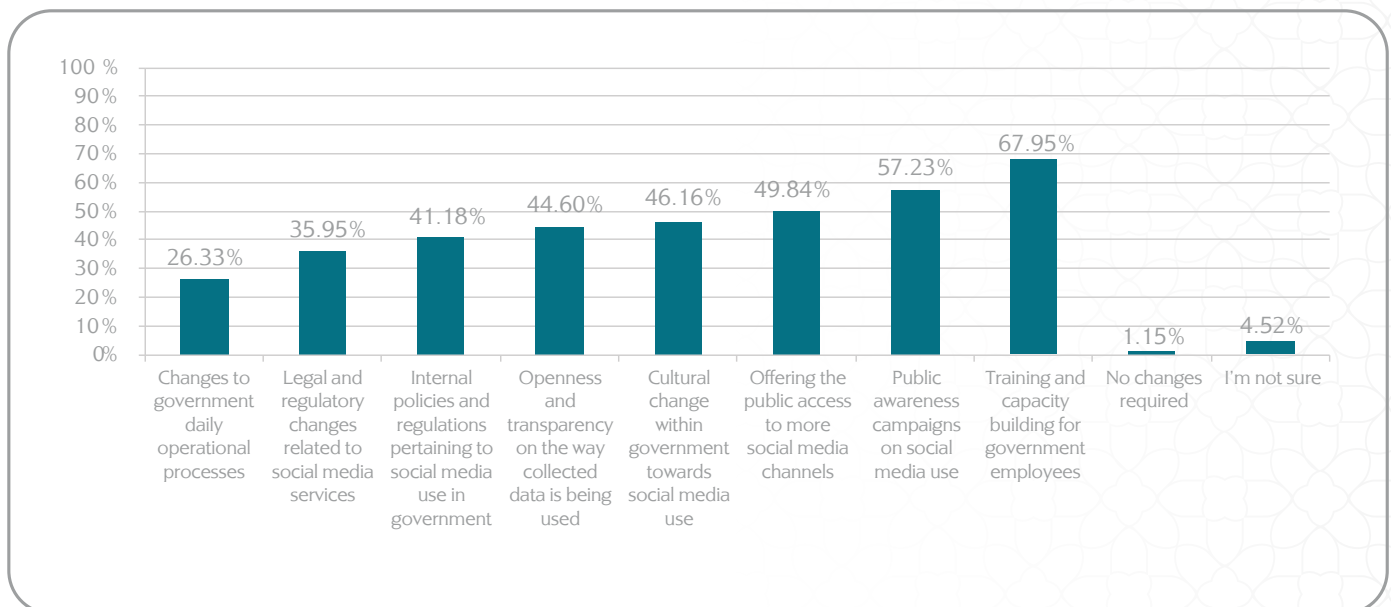
In light of the positive view held regionally of the impact of citizen engagement on service design and delivery through social media, what steps do governments in the Arab region need to take to take advantage of this opportunity? The vast majority of respondents perceived building capacity in social media usage in service delivery and design within government as the primary change needed for successfully incorporating social media in service design and delivery cycles by their government (70%). Furthermore, a majority (57%) believe that government needs to improve public awareness efforts and 50% of respondents see a need for access to more social media channels. A similar percentage (46%) saw a need for a shift in government culture with regard to social media use and 45% indicated a need for more transparency and openness in government social media practices. Finally, a minority of respondents (26%) indicated a need for change in governments’ daily operational processes to facilitate citizen engagement around services (Figure 12). Commentary by respondents indicated that trust is the key to better utilizing social media for service delivery; not only must governments nurture citizens trust in their practice and operation, but that governments also must put more trust in its citizens and increase levels of engagement for better public service design and delivery. Citizens, claim many respondents in our regional survey, need

to be empowered. The potential for information sharing and levels of communication facilitated by social media must become a building block that contributes to government openness and transparency and to a populace that is prepared and inclined to participate.

“Here, [government] must instill trust in the citizen so that you may reap the fruit of his/her cooperation in the future”
 Survey Respondent

Figure 12: Changes governments need to make, to better leverage social media for citizen engagement and better services

“What changes does the government in your country need to make, to better leverage social media for citizen engagement and deployment of better services?”



However, while social media usage continues to grow strongly around the Arab region, its penetration is still limited to relatively small portion of the population in many Arab countries. Many respondents indicated that relying on social media as a sole citizen engagement channel, may exclude many who do not have the economic means or are not educated enough to use it.

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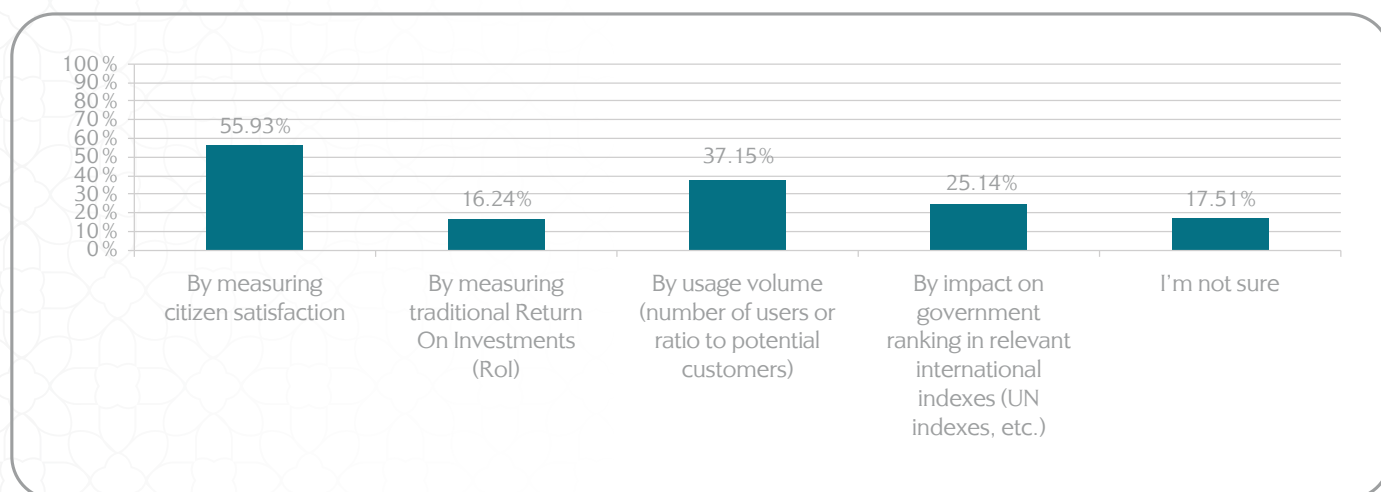
2.4 The View on the Government Side

We asked respondents who said that they are government employees¹⁴ additional questions to help investigate perceptions regarding government utilization of social media for service delivery and citizens engagement.

When asked about how the impact of social media could be measured, 56% of government employees among our respondents thought that “citizen satisfaction” was a good indicator of impact and 37% thought that “government ranking in international developmental benchmarks was an appropriate indicator. Meanwhile, 25% thought that impact could be evaluated by measuring traditional “returns on investment” within the government (Figure 13).

Figure 13: Measuring the impact of social media on government services and citizen engagement

“How can the impact of social media on government services and citizen engagement be measured in your view?”



2.5 Empowering Civil Society? Social Media and Service Delivery beyond the Public Sector

Civil society and other providers of public services are also using social media to engage with citizens on service delivery globally. In the Arab world, the increased penetration of social media, coupled with the low levels of quality and accessibility of public service provision in the region prompted many civil society organizations to fill these gaps and utilize social media tools in innovative ways for service delivery. Across the Arab region, an unexpected 42% of respondents indicated that non-governmental organizations in their country were using social media to deliver services that government was not providing (Figure 14); a finding that may indicate social media is providing a growing space for the ‘3rd sector’ to maneuver in many Arab countries. Breaking down this finding, predictably, a larger percentage of respondents (49%) from lower-middle income Arab countries said this was true in their country of residence than from upper middle or high income countries (Figure 15). Overall, 73% of respondents indicated that they believed the increased utilization of social media was aiding in the development of civil society structures in their country of residence (Figure 16).

14. A sample of N = 708 across 5 Arab countries mainly.

Many respondents said that civil society entities such as charities and volunteer networks were benefiting from social media in both communicating with each other and other volunteers, raising awareness about their work and causes, as well as communicating with their networks in real time.

Figure 14: Use of social media by non-government entities to deliver public services

“In the past few years, have non-government entities used social media to deliver public services that your government can no longer provide?”

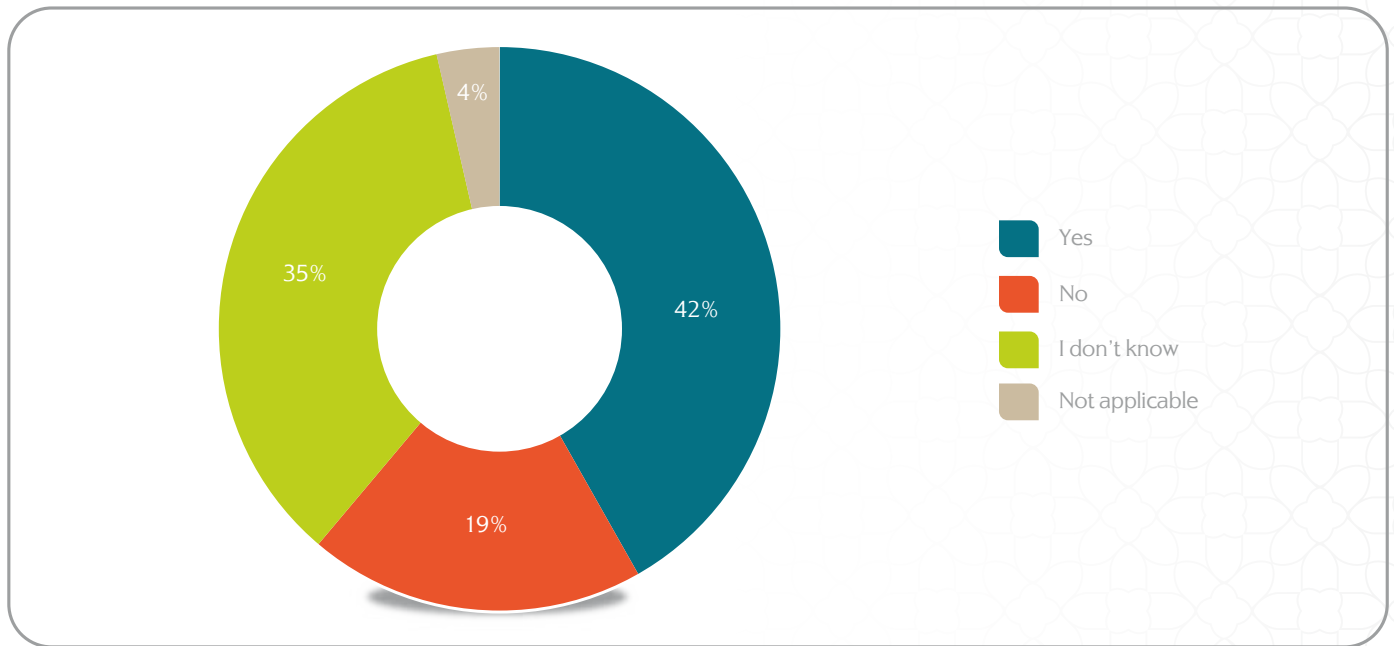
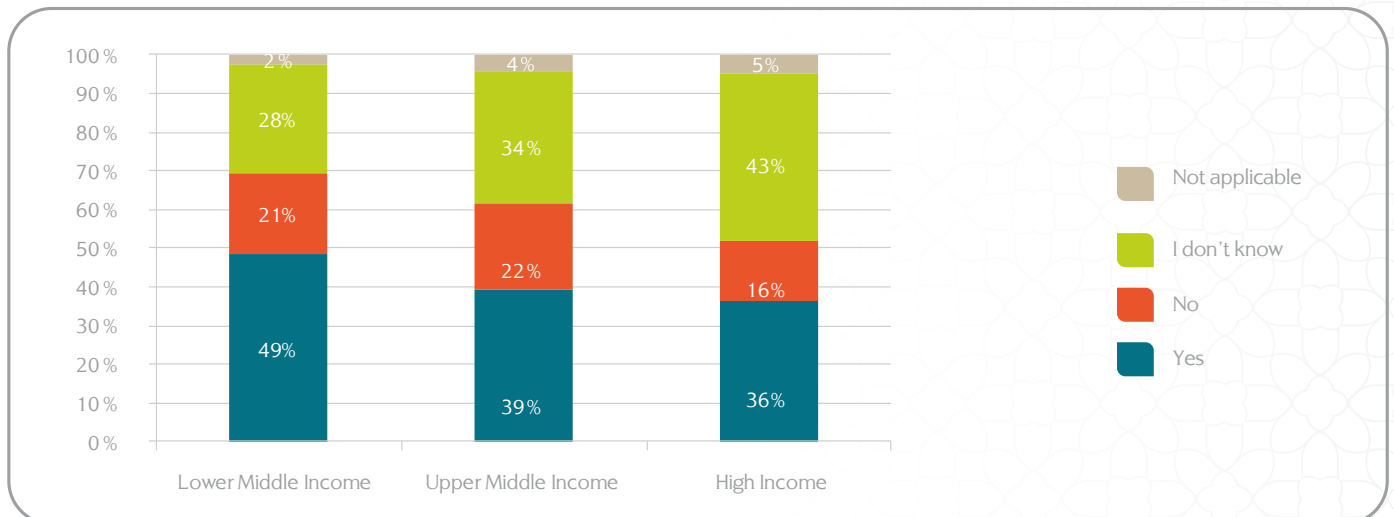


Figure 15 Use of social media by non-government entities to deliver public services (Breakdown by Country Income)

“In the past few years, have non-government entities used social media to deliver public services that your government can no longer provide?”

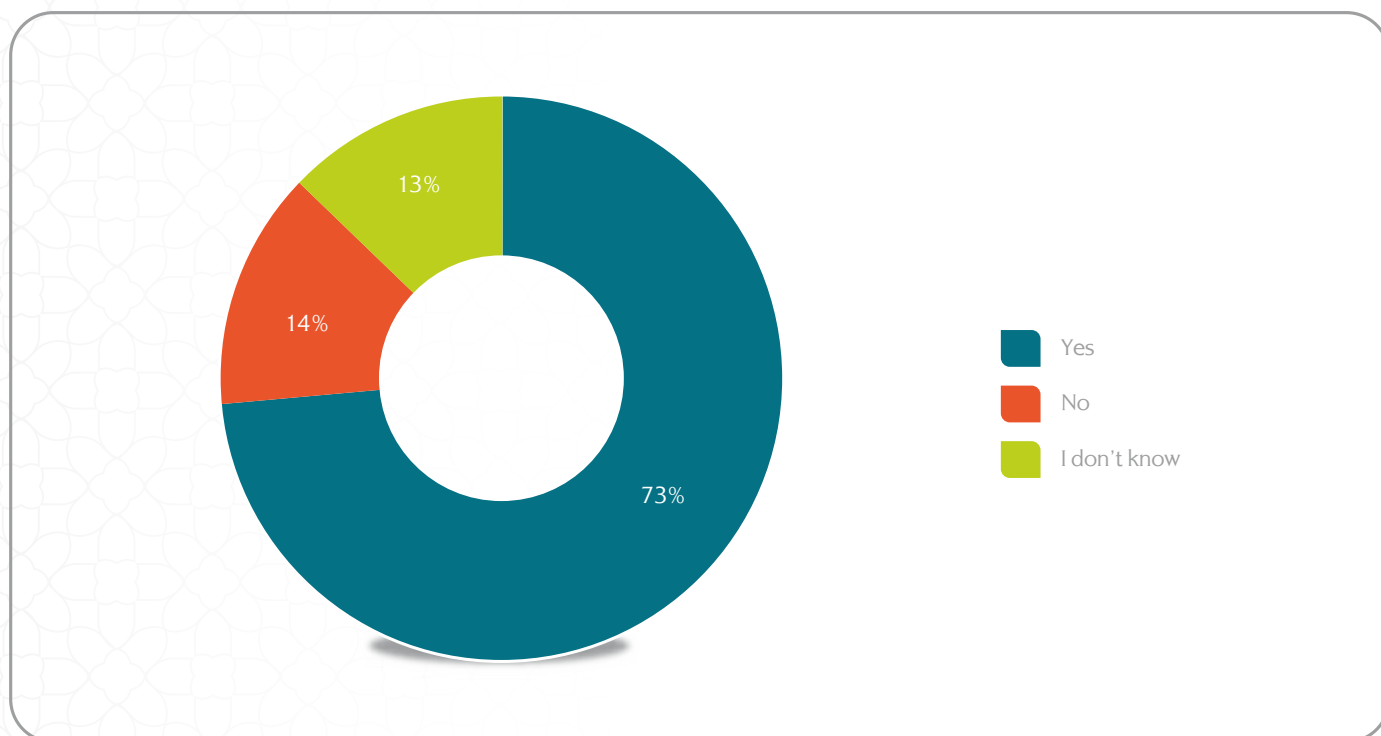




An unexpected 42% of respondents indicated that non-governmental organizations in their country were using social media to deliver services that government was not providing

Figure 16: Impact of social media usage on the development of “civil society”

“Do you believe that citizen use of social media contributes to the development of “civil society” in your country of residence?”



2.6 Social Media, Citizen Engagement and Government Services: Key Findings

At a regional level, Arab citizens have positive attitudes towards the use of social media by government for public service design and delivery: The receptiveness to government-driven citizen engagement efforts by the recipients of public services in the Arab region appears to be high. Our findings indicate that customers across the Arab world have high expectations for the use of social media for public service delivery. Most respondents agreed that engagement through social media for service delivery presented benefits such as increased service accessibility, improved quality of services, inclusiveness and reduced costs.

Arab citizens are mainly utilizing government social media pages for accessing information on public services, but not as much for giving feedback: The majority of Arab citizens surveyed frequent government social media pages on a regular basis and over half of them use these pages to gather information on services. A much smaller percentage is using government social media pages to provide feedback on services, indicating an existing view on the usefulness of social media for two-way interaction with government on public services, tempered with skepticism of governments' responsiveness to this feedback. These usage trends also indicate that Arab citizens are still only utilizing the informational and not the interactive aspects of social media with regards to government services.

Social media has the potential to enable engagement but governments have to rise to citizens' expectations: These high expectations of the use of social media for service delivery present many opportunities for government entities to utilize social media in the service delivery cycle. However, several steps are needed by government entities in order to better engage citizens and deploy services, such as capacity building for government employees, awareness campaigns, and cultural shifts within governments towards the use of social media.

Understanding the risks of using social media for service delivery: Research findings indicate that Arab customers are aware of the risks involved in adopting social media in the service delivery cycle. Cyber security, negative participation, lack of proficiency by public entities and invalid information all emerged as possible risks.

Civil society structures are empowered and are using social media for service delivery: In the Arab World, the increased penetration of social media, coupled with the low levels of quality and accessibility of public service provision in the region pushed many civil society organizations to fill these gaps and utilize such tools in innovative ways for service delivery. Research findings indicate that voluntary organization, charities, and other non-governmental public service providers are utilizing social media's communicative potential to reach ever wider networks of people.

3.1 Mapping Social Media in the Arab World

Facebook in the 1st half of 2014

This edition of the Arab Social Media Report continues to explore social media usage trends in the Arab Region with a focus on Facebook, Twitter and LinkedIn. This section provides an update on Facebook usage trends and demographics in 2014 (Figure 17 and 18). As with previous editions, the numbers presented here were collected periodically for all Arab states between June 2013 and May 2014, including demographic information such as age and gender of users. The following represent the 6th Arab Social Media Report's key findings:

Facebook in the Arab World: A Snapshot

- The total number of Facebook users in the Arab world as of beginning of May 2014 is 81,302,064 up from 54,552,875 in May 2013.
- By May 2014 the country average for Facebook penetration in the Arab region was over 21.5% up from 15% in May 2013
- The percentage of female users has dipped slightly (from 33.4% in May 2013, to 31.75% in May 2014), after having fluctuated slightly between 33.4% and 34% in the past two years. This is still significantly lower than the global average of roughly 57%
- The percentage of youth (those under 30) has decreased slightly due to slow and steady uptake amongst users aged 30 and above. As of May 2014 the percentage of users between 15 and 29 years old was 67%.
- In terms of Facebook penetration rate in the region, Qatar now leads in the Arab region, followed by the UAE, with Jordan, Lebanon, and Bahrain rounding out the top five countries in terms of Facebook penetration.
- Egypt continues to constitute about a quarter of all Facebook users in the region (24%) and has gained the highest number of new Facebook users since January 2014, with an increase of over 2.6 million users in that time period.

Figure 17: Number of Total Facebook Users in the Arab Region between June 2010 and May 2014 (Top 10 Facebook populations)

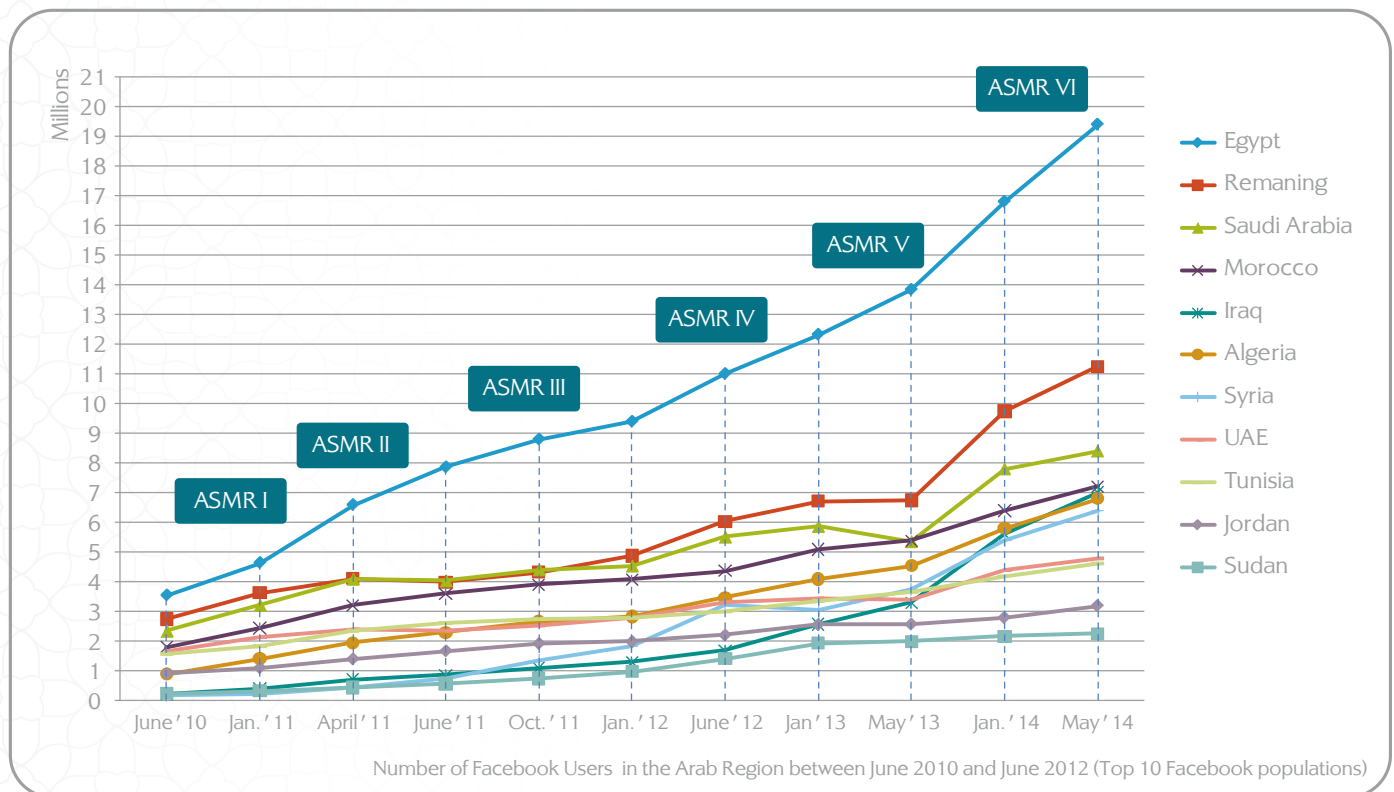
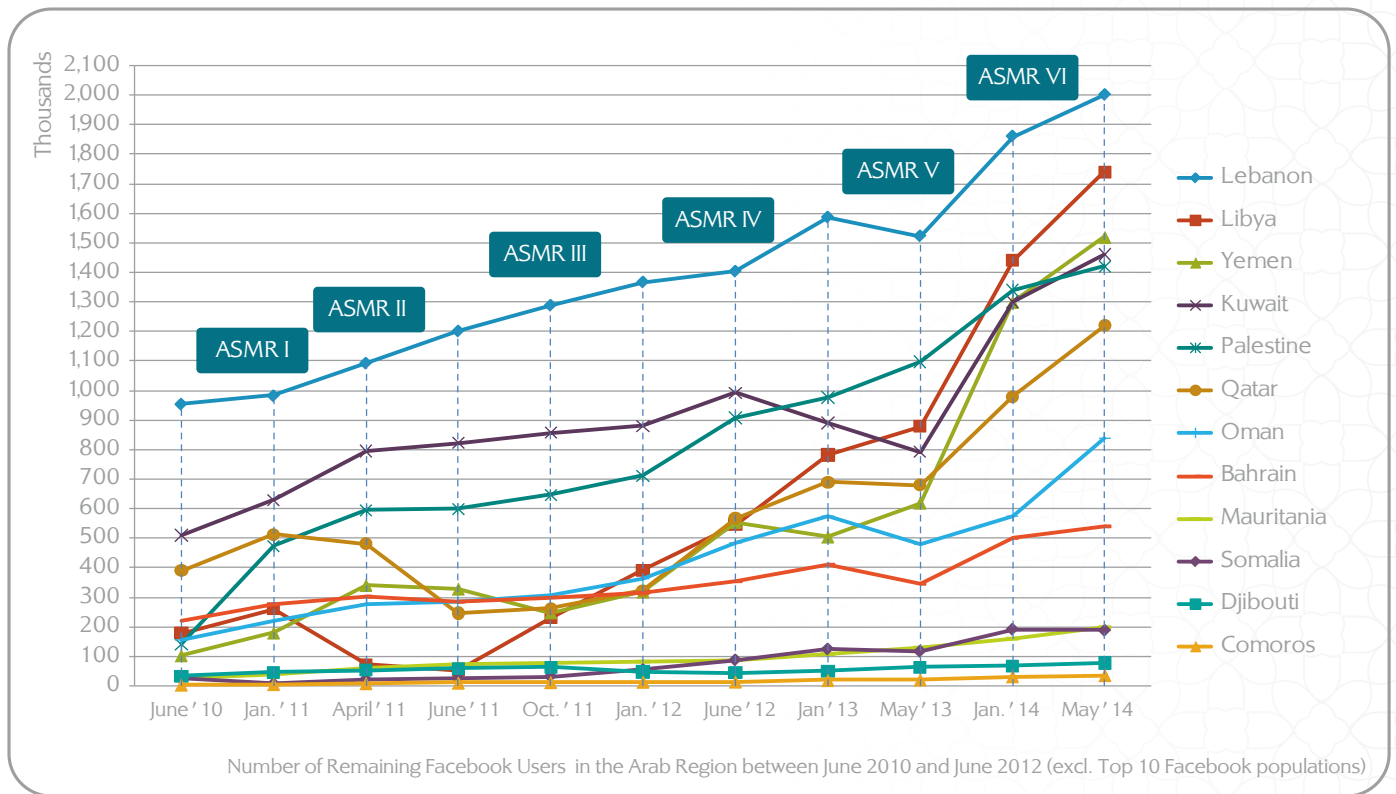


Figure 18: Number of Remaining Facebook Users in the Arab Region between June 2010 and May 2014 (excl. Top 10 Facebook populations)



A comparison of Facebook uptake in the top ten countries in terms of Facebook penetration worldwide and Facebook uptake in the Arab World shows that users in Arab countries are still adopting Facebook at a higher rate than the world's top ten. Even countries with smaller penetration rates - such as Syria, Libya, and Iraq - have seen more increase in their Facebook user penetration this year than Denmark, Australia, the United States and the United Kingdom. Uptake in all Arab countries has increased since the last edition of this report was published with the exception of Somalia, which has seen a drop in Facebook users (Figures 19, 20 and 21).

Figure 19: New Facebook users between January and May 2014 (% of population)

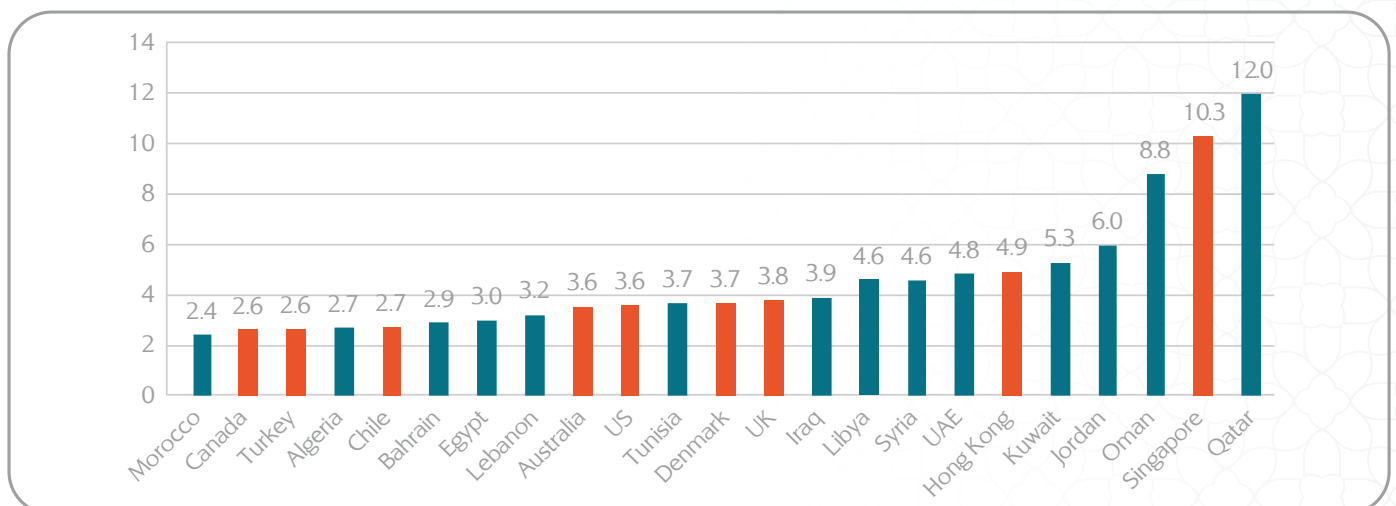


Figure 20: Number of New Facebook Users in the Arab Region between January and May 2014

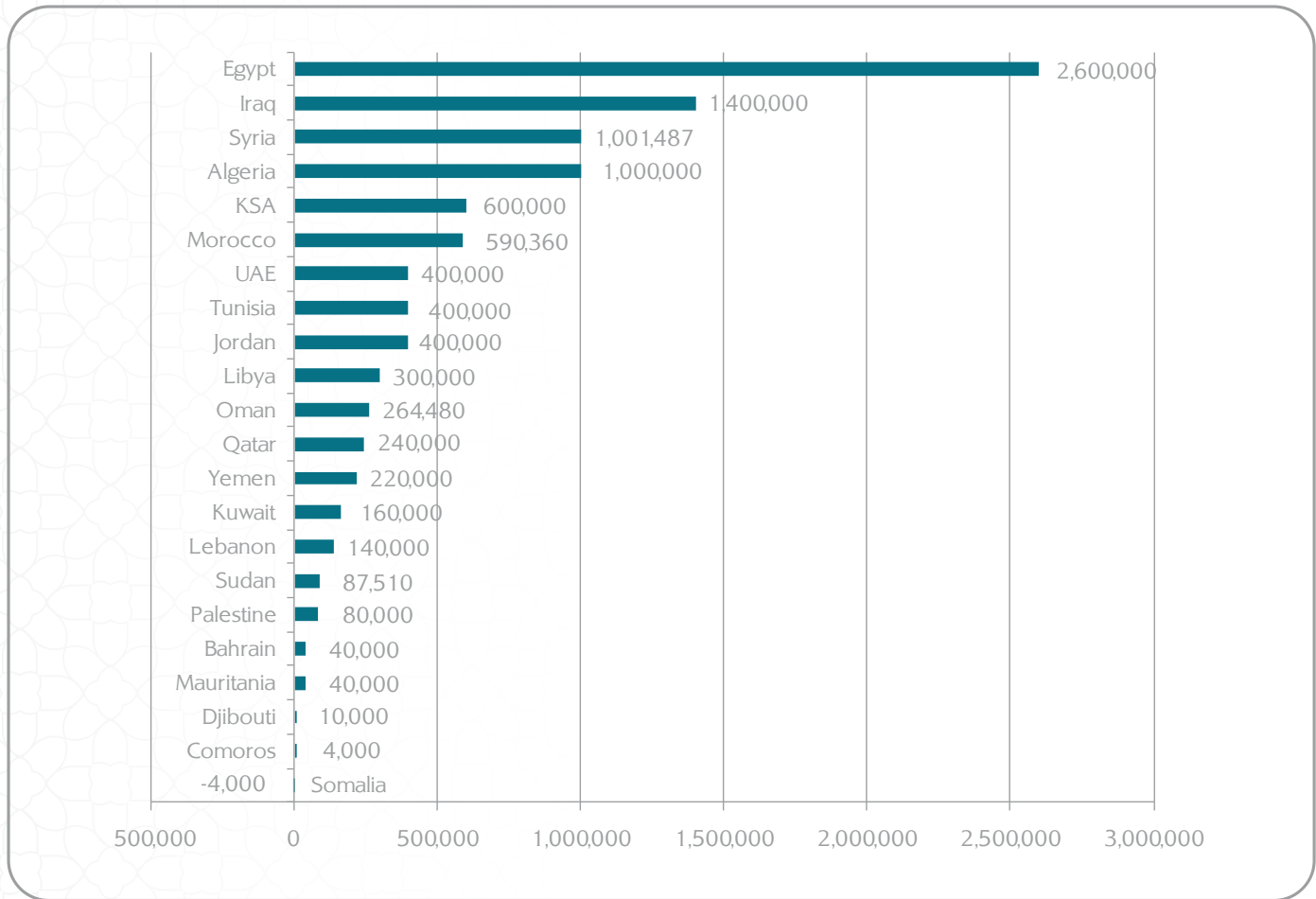
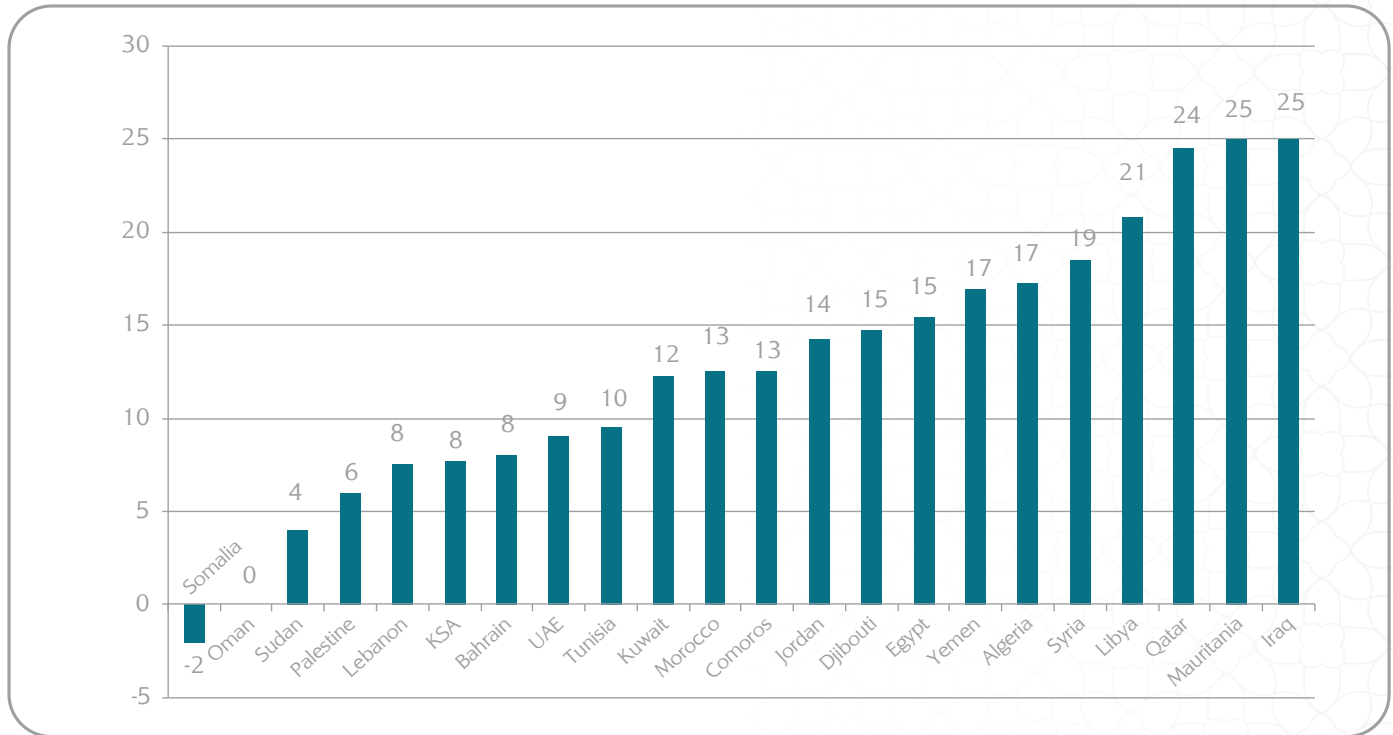
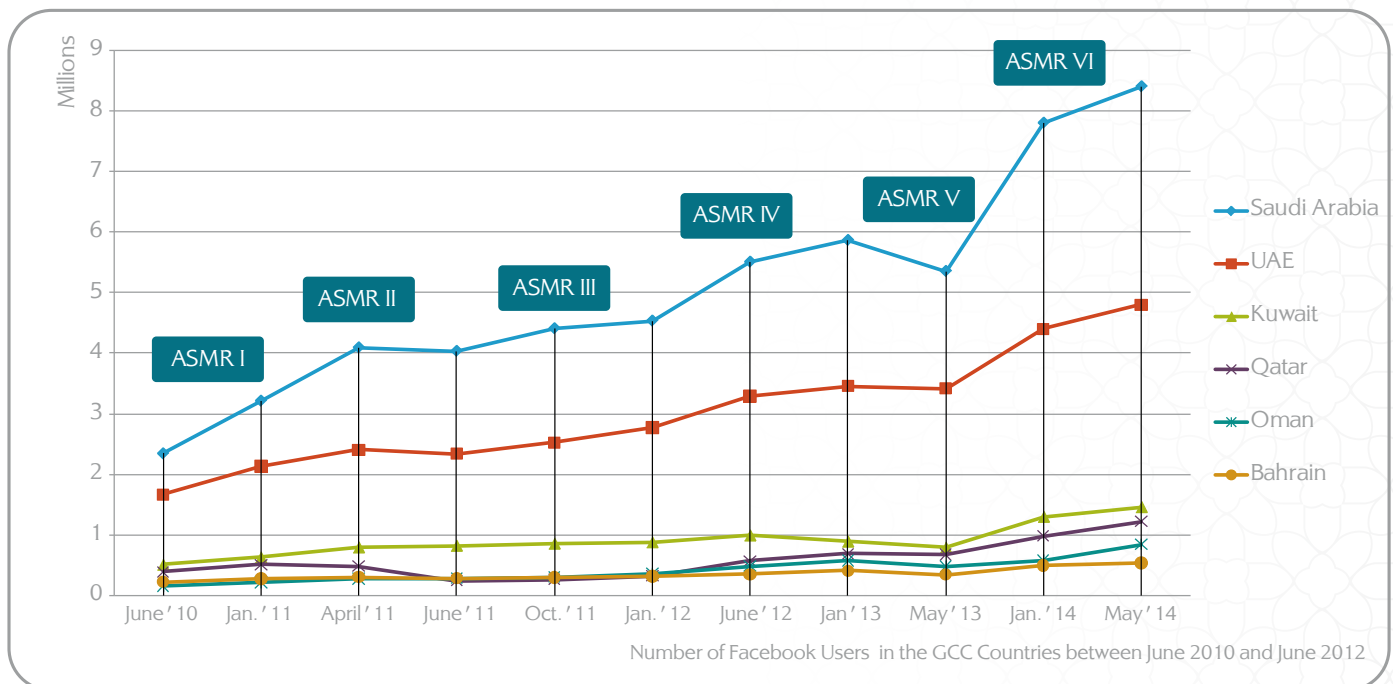


Figure 21: Growth of Facebook users between Jan and May 2014 (% of population)



In the GCC countries Facebook usage has seen a healthy resurgence after the noticeable dip seen in last year's report (Figure 22), most notably in Saudi Arabia, Qatar and the UAE.

Figure 22: Number of Facebook Users in the GCC Countries between June 2010 and May 2014



Facebook Penetration in the Arab World:

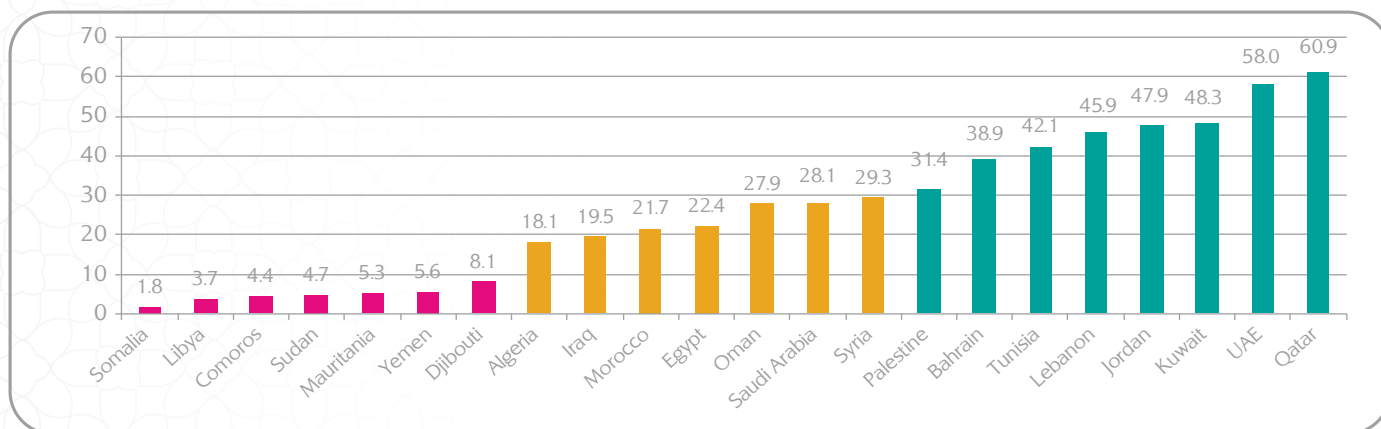
For the first time in the series, Qatar now has the highest percentage in terms of Facebook penetration in the region, with 61% of its population using Facebook. The UAE closely has the 2nd highest at 58% penetration, both countries having passed the 50% penetration mark for the first time. Jordan, Lebanon and Tunisia continue to be in the High Penetration bracket of over 30% Facebook penetration, which has also expanded to include three more Arab countries (Kuwait, Bahrain and Palestine), reflecting the increased growth of Facebook users in the region, and in the GCC specifically. The remaining GCC countries are at the high end of the 'Emerging Countries' penetration bracket, though they have still not made it past the 30% penetration mark (Figure 23).



'Facebook penetration in Qatar and the UAE has passed the 50% penetration mark for the first time'

Figure 23: Facebook User Penetration * in the Arab Region (May 2014)

* 2014 populations from United Nations ILO Department of Statistics, <http://laborsta.ilo.org>. Additionally, Sudan population numbers do not reflect the change the country went through in 2011



High Penetration: These countries' Facebook user penetration rates indicate persistent growth and a pervasive use of Facebook in their societies. (Facebook penetration between 30% and above)

Emerging countries: These countries' Facebook user penetration ranges from 10%-30%, indicating a medium penetration of Facebook users.

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

Egypt still has the largest portion of Facebook users in the Arab world followed by Morocco and Saudi Arabia. The UAE, though much smaller in terms of population claims a big piece of the pie with over 4.8 million users in the country (Figure 24 and 25).

Figure 24: Number of Facebook Users and Percentage of Users in the Arab Region (May 2014)

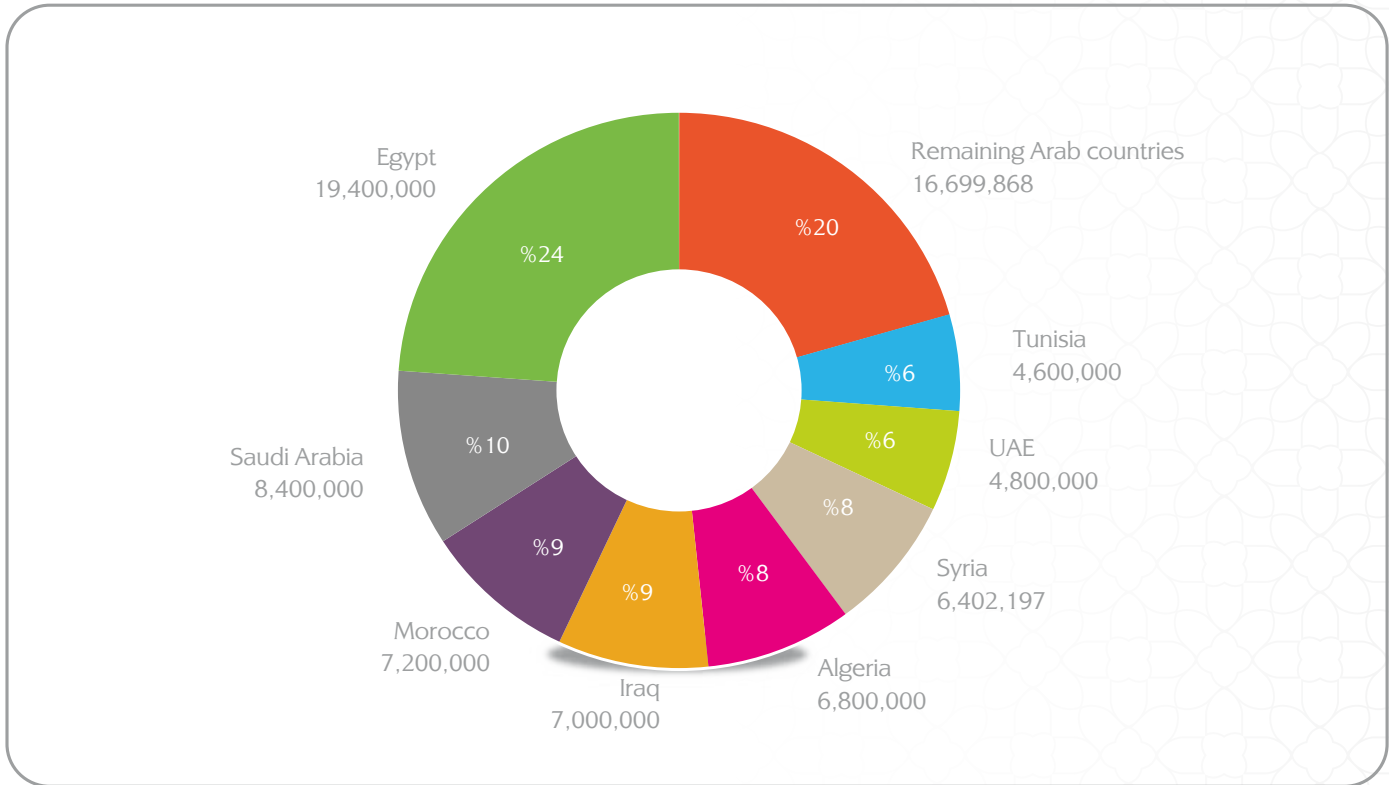
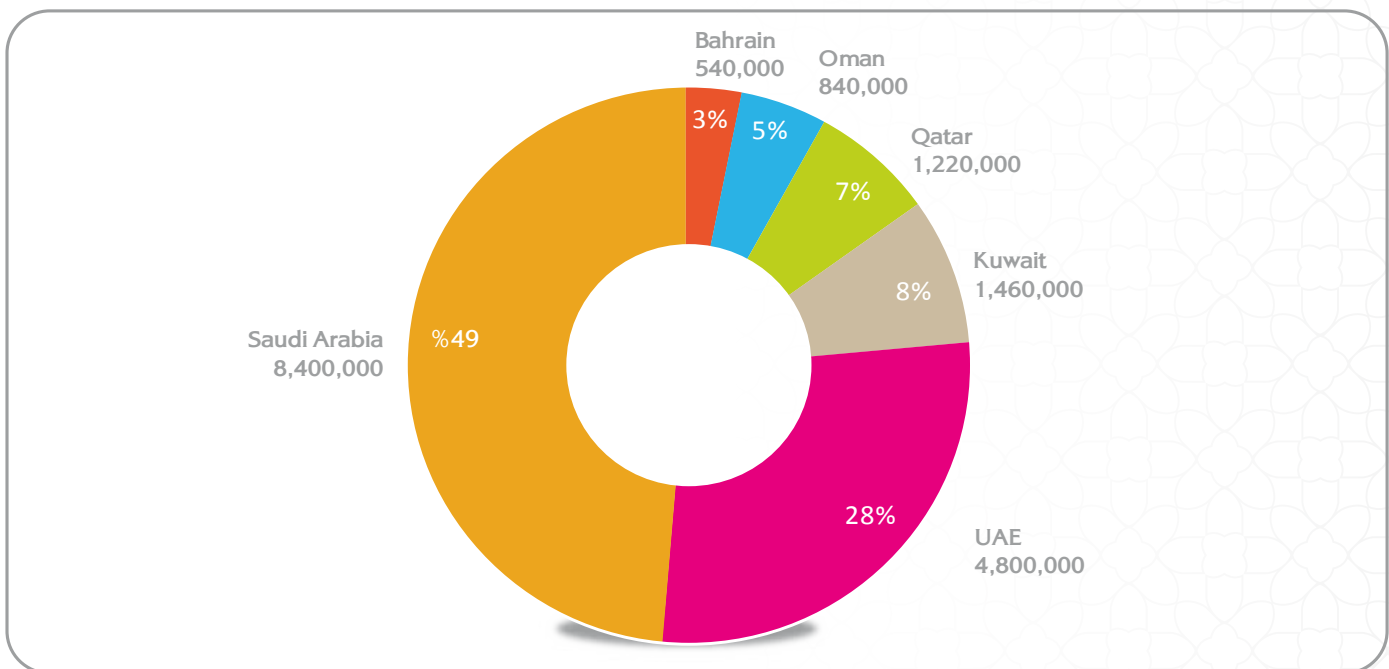


Figure 25: Breakdown of Facebook users in the GCC (May 2014)

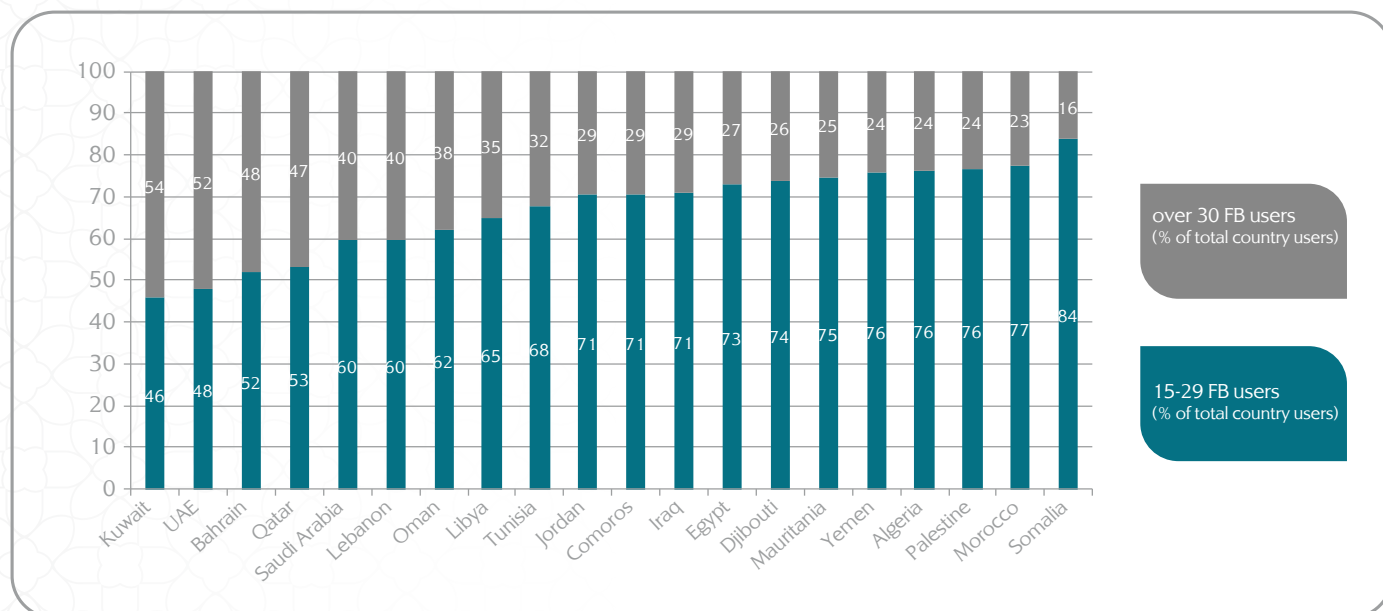


Demographic and gender breakdown of Facebook users

On average, youth make up 67% of users in the region. This represents a slight dip in the demographic trend observed over the past two years; in May of 2012 youth made up 70% of Facebook users. This is now changing as we witness the slow uptake of Facebook by users over the age of 30. Across the board, usage amongst this age group has held steady or increased by about 1-3% in all Arab countries over the past year (with the exception of Somalia and Comoros).

Users over the age of 30 now constitute more than 50% of Facebook users in Kuwait and the UAE, and almost half of all users in Qatar and Bahrain, indicating increased maturity of social media users in these countries. This implies a slight shift in usage among these countries, as users in upper age group brackets tend to have more professional uses for social media than the younger age groups (Figure 26).

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

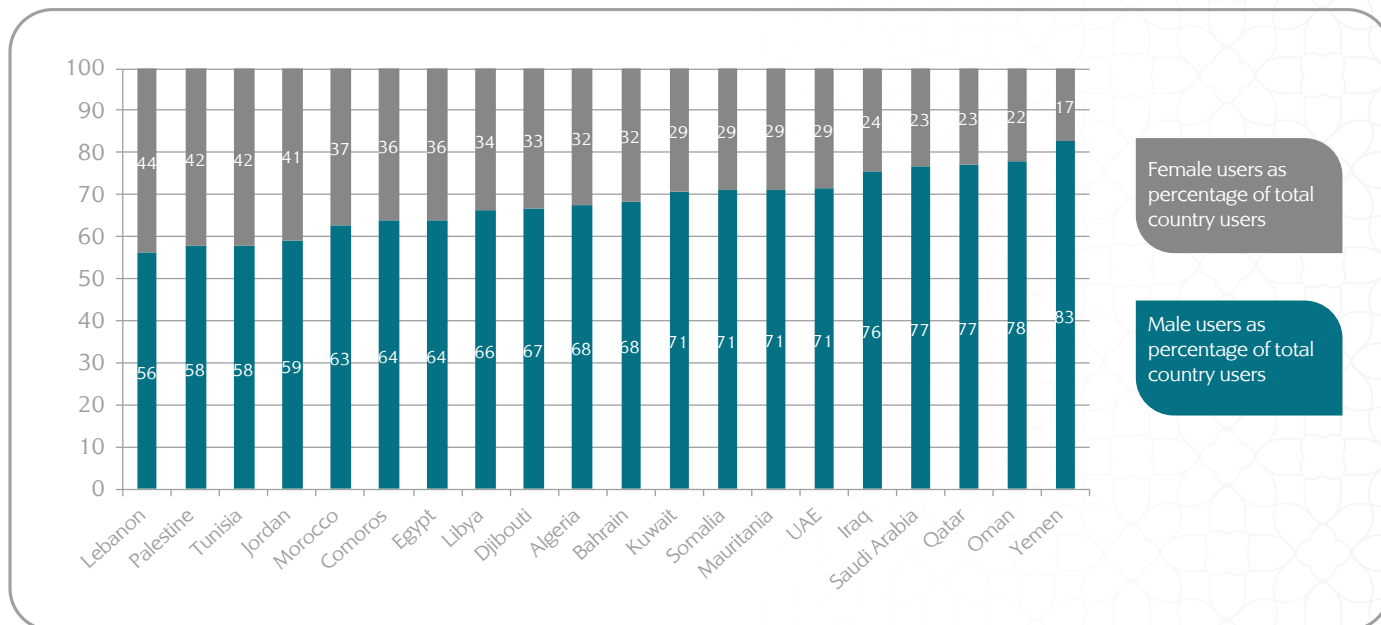


The percentage of female Facebook users in the Arab world has dropped amongst almost all Arab countries in the past year, confirming the ongoing constraints female users face in utilizing social media, as explored in past research published in a previous edition of the Arab Social Media report¹⁵. On average, females make up 31.75% of Facebook users, as opposed to 33.4% at the same time last year. This continues to be lower than the global average where females make up 57% of users¹⁶. Lebanon continues to be the most gender balanced of the Arab countries followed by Palestine, Tunisia, Jordan, Morocco (Figure 27).

15. Mourtada, R., Salem, F., Dabbagh, M., Gargani, G. (2011) The Role of Social Media in Arab Women’s Empowerment. Dubai School of Government. Dubai

16. <http://mashable.com/2012/03/09/social-media-demographics/>

Figure 27: Breakdown of Facebook Users by Gender in the Arab States



Language Breakdown of Facebook users

In this edition of the report, the language breakdown of Facebook users reflects the platform’s multilingual capabilities. Since multilingual posting is possible on Facebook pages, users in the Arab world tend to use multiple languages on Facebook. Consequently, the same user may be accounted for more than once while calculating the breakdowns of Facebook users per language (once for each language) The sum of the percentages of people who use the three most popular languages on Facebook (Arabic, English and French) in each country will then necessarily be over 100%, since many users in the region use at least two languages on Facebook.

Preference for all three languages has grown over the past year - possibly due to the fact that users no longer need to restrict themselves to the use of one language - with the top users in each language exhibiting the most growth in that language, compared to the two other lesser used languages. As such, Figures 28, 29 and 30, show that the top country of Arabic users on Facebook continue to be Yemen, Libya, Palestine, Iraq, Egypt and Jordan, displaying an increase of between 10-18% over the past year of people who prefer to use Arabic on Facebook in these countries. English is still the dominant language on Facebook for users in most GCC countries, with a 20-24% increase in numbers of people who use English on the site in these countries. North African countries; Algeria, Morocco and Tunisia, continue to prefer the use of French over Arabic and English, with a 13-19% increase in the number of users who do so.

Figure 28: Percentage of Facebook users who post in Arabic as % of total users

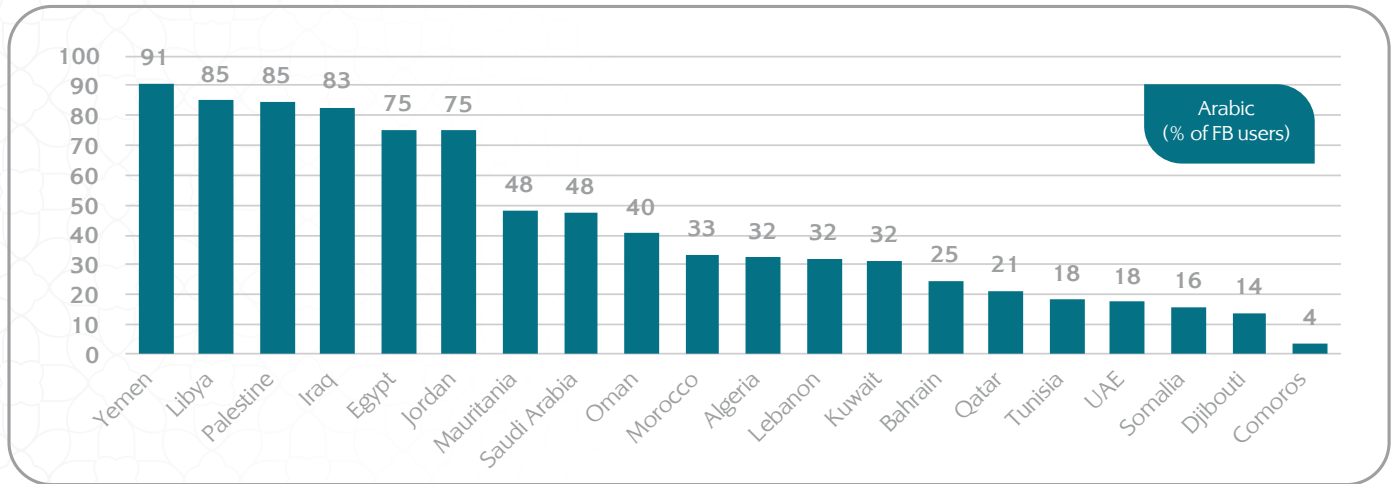


Figure 30: Percentage of Facebook users who post in English as % of total users

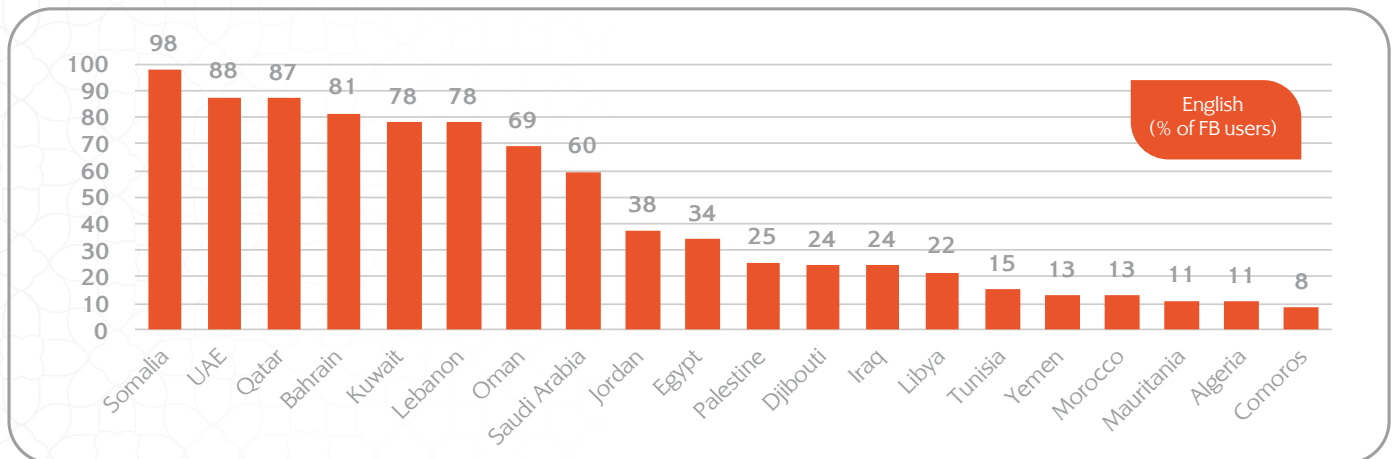
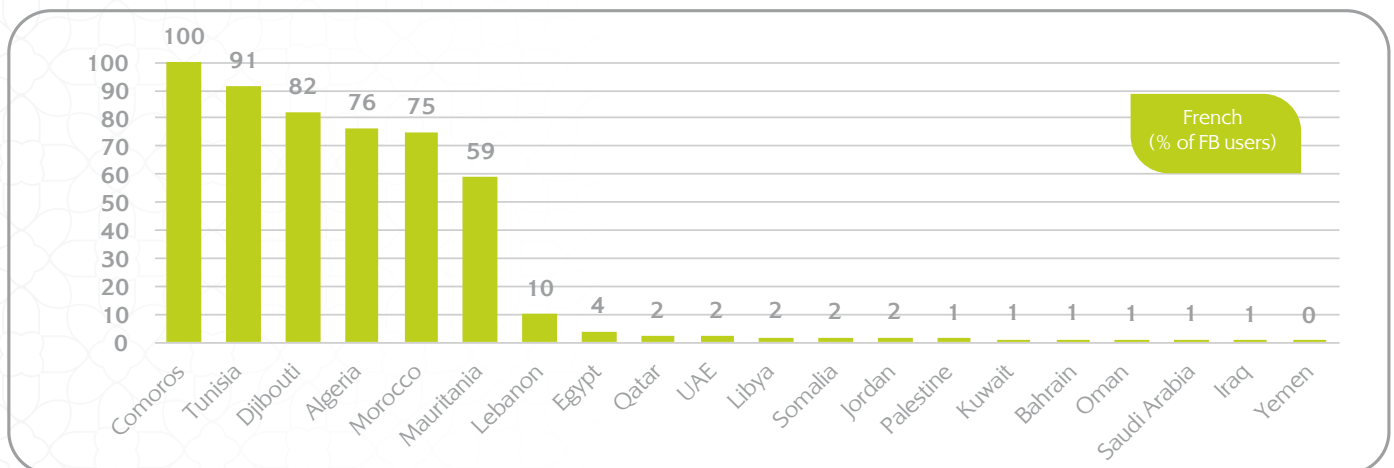


Figure 31: Percentage of Facebook users who post in French as % of total users



3.2 Mapping Twitter in the Arab World – Q1 2014

The total number of active Twitter users and tweet volume in each of the 22 Arab countries was estimated in the month of March 2014 using a Twitter API (application programming interface) specially developed for this research. The methodology used is detailed in Annex 1. Briefly, it consists of randomly sampling a certain number of Twitter users in each country captured across the month of March 2014, and using this sample to extrapolate and estimate the active Twitter population. The volume of tweets and top trends throughout March 2014 were also estimated.

Twitter in the Arab World: A Snapshot

- The total number of active Twitter users in the Arab world reached 5,797,500 users as of March 2014.
- The country with the highest number of active Twitter users in the Arab region is Saudi Arabia with 2.4 million users, accounting for over 40% of all active Twitter users in the Arab region.
- The estimated number of tweets produced by Twitter users in the Arab world in March 2014 was 533,165,900 tweets, an average of 17,198,900 tweets per day.
- Saudi Arabia, alone, produced 40% of all tweets in the Arab world, while Egypt produced 17% and Kuwait produced 10%.
- The percentage of female Twitter users in the Arab region – published for the first time in the Arab Social Media Report series - is 36.6%, slightly higher than that of female Facebook users in the region.

Twitter Uptake in the Arab region

The total number of active Twitter users in the Arab world has reached 5,797,500 users as of March 2014. As officially defined by Twitter, an “active user” is someone who logs in (but does not necessarily tweets) once a month. The country with the highest number of active Twitter users in the region is Saudi Arabia. With 2.4 million users, which account for 40% of all active twitter users in the Arab region. Saudi Arabia has more than twice the number of users in Egypt; the country with the second highest number of active users. Egypt, however, has gained the largest number of new users since last year, with 571,000 new users, compared to Saudi Arabia’s slightly lower number of new users (514,000). The UAE, despite its relatively small population has over half a million active Twitter users, the third highest number in the region, and also the third highest number of new users gained last year (101,000) (Figures 32 and 33).

Figure 32: No. of Active Twitter Users in the Arab Region (March 2014) - Countries with over 50,000 users

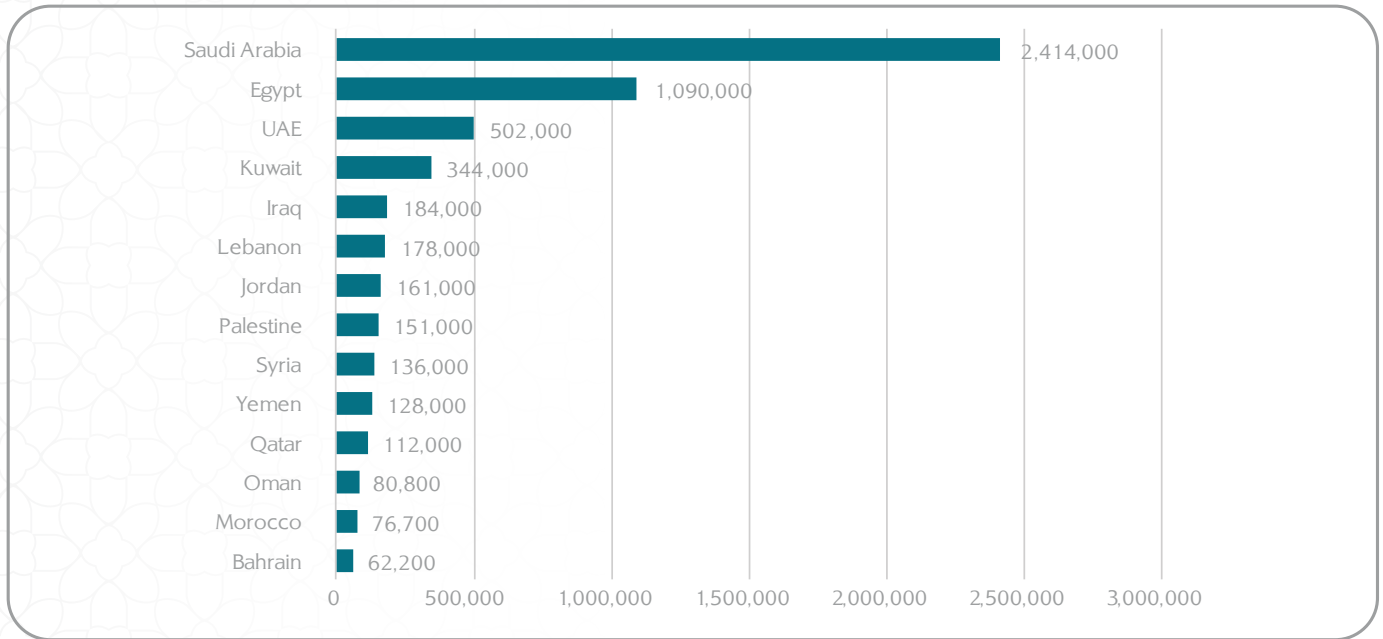
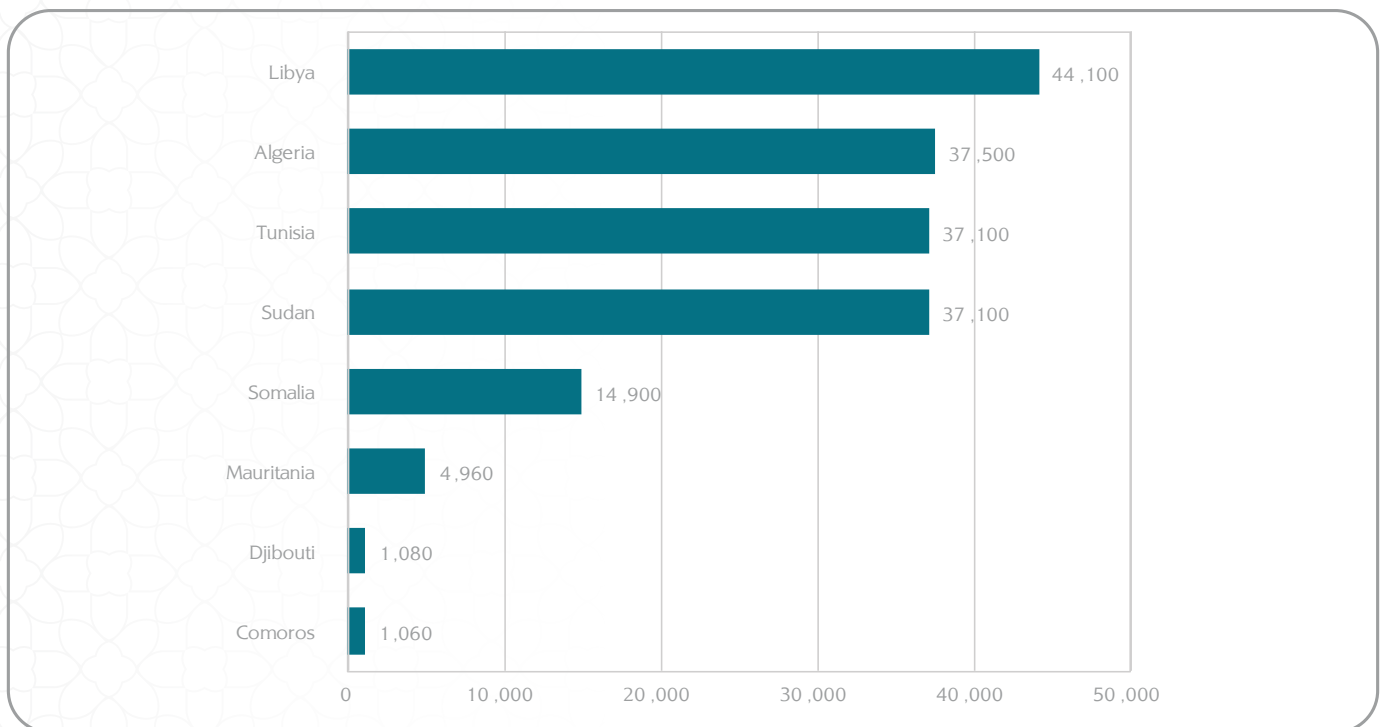


Figure 33: No. of Active Twitter Users in the Arab Region (March 2014) - Countries with under 50,000 users



Despite the large number of Twitter users in Saudi Arabia and Egypt, these countries do not have the highest Twitter penetration rate in the region. Kuwait, a much smaller country, continues to enjoy the highest penetration rate with 11.4% of its population active on Twitter. In general, GCC countries have the highest penetration rates in the region. As with Facebook, we see an increase in the number of Arab countries joining the High Penetration bracket on Twitter, which has expanded to include Qatar and the UAE. Palestine and Egypt join Jordan and Lebanon this year as the only non-GCC countries with penetration rates above 1% of the population. Libya, Syria, Iraq and Yemen, though still in the ‘developing’ bracket, have shown significant growth over the last year (Figures 34 and 35).

High Penetration: These countries’ Twitter user penetration is above 5%, indicating a relatively high use of Twitter in their societies relative to other Arab countries.

Emerging countries: These countries’ Twitter user penetration ranges from 1%-5%, indicating a medium penetration of Twitter users relative to other Arab countries.

Developing: These countries have Twitter user penetration rates are under 1%.

Figure 34: Twitter Penetration in the Arab Region (countries with more than 1% penetration) - March 2014

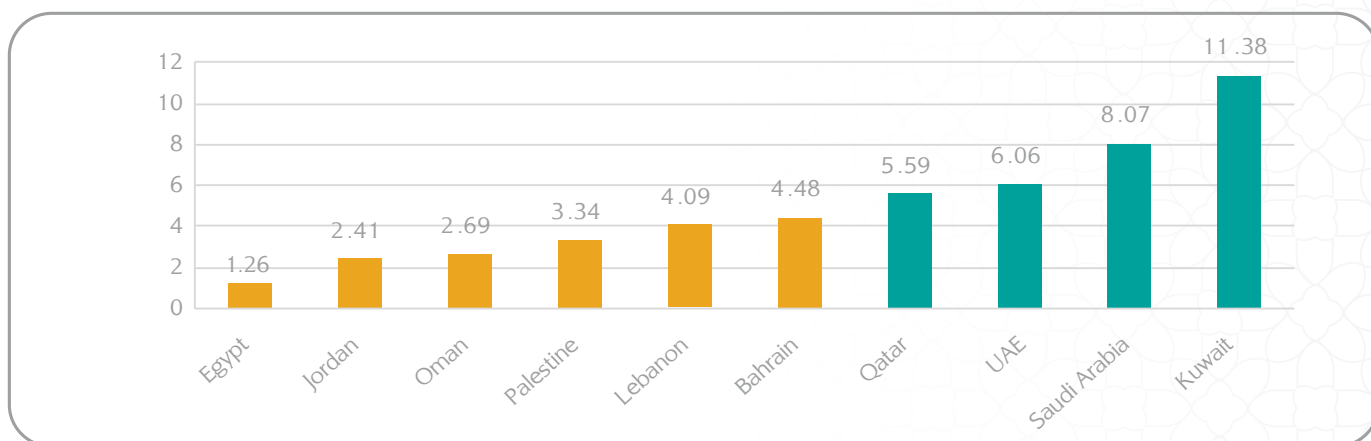
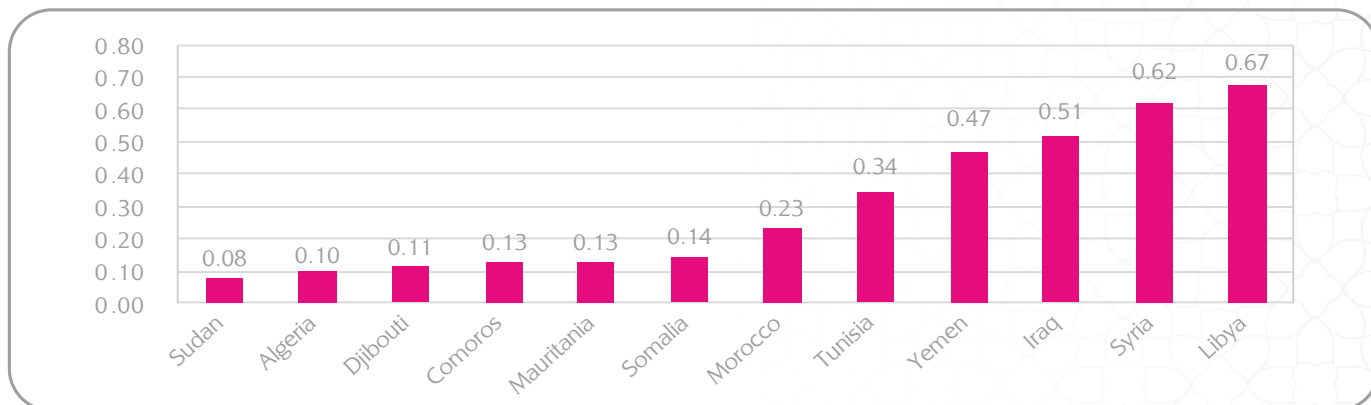


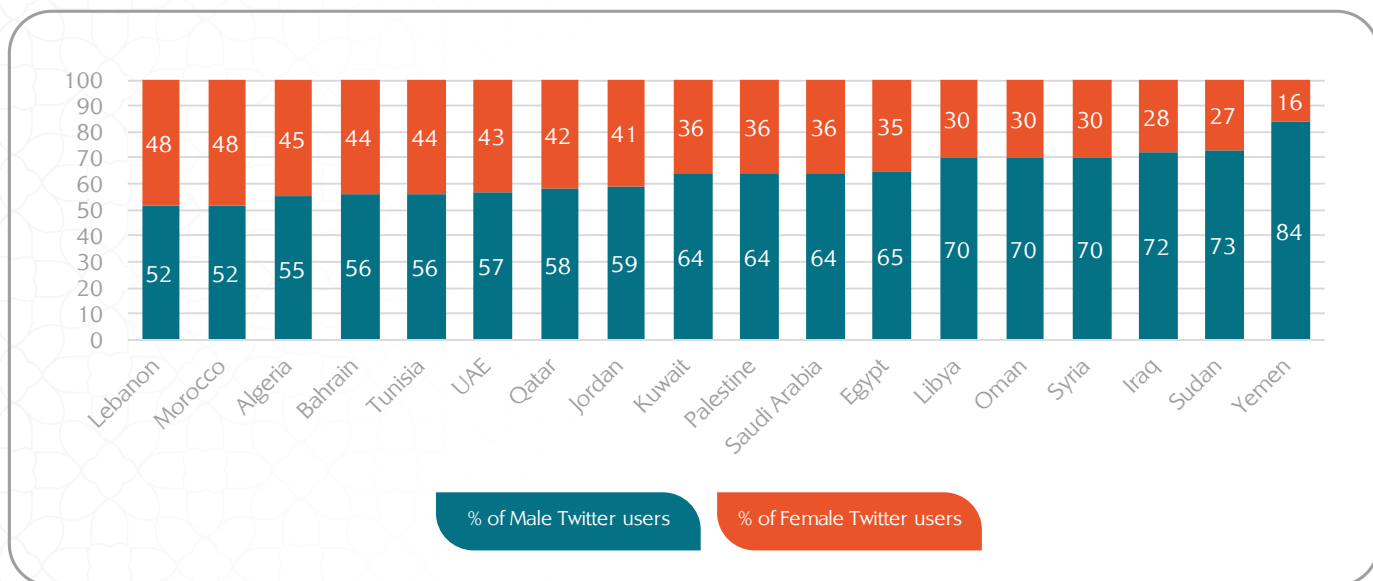
Figure 35: Twitter Penetration in the Arab Region (countries with less than 1% penetration) - March 2014



Demographic Breakdown of Arab Twitter users:

For the first time in the Arab Social Media Report series, we publish the demographic breakdown of Twitter users in the Arab region. Our findings indicate that roughly over a third of Arab users (36.6%) are females. This is lower than the global average, where females make up 59% of users, but still represents a slightly higher percentage of females than Facebook in the region. As with Facebook, Lebanon continues to be the most gender balanced of the Arab countries, followed by Morocco, Algeria, Bahrain and Tunisia (Figure 36).

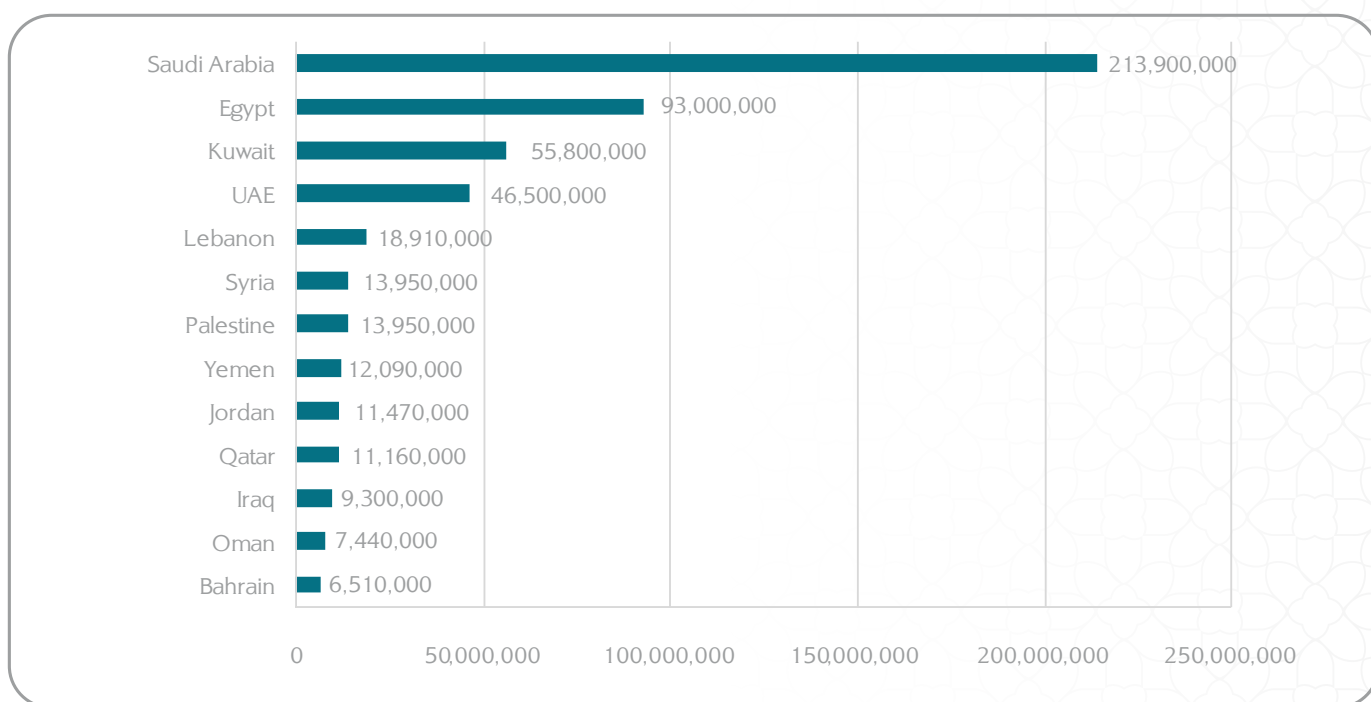
Figure 36: Gender breakdown of Twitter users in the Arab Region - March 2014



Tweets Volume in the Arab region:

The volume of tweets from each country was estimated during the month of March 2013, and calculated as a percentage of total tweets in the Arab region over this time period. The estimated number of tweets produced by Twitter users in the Arab world in March 2014 was 533,165,900 tweets or 17,198,900 tweets per day. Unsurprisingly, countries with the highest numbers of active Twitter users account for the majority of tweets. Saudi Arabia, alone, produced 40% of all tweets in the Arab world, while Egypt produced 17% and Kuwait produced 10% (Figures 37, 38, 39)

Figure 37: No. of Tweets in the Arab region - (over 5 million) during March 2014



Saudi Arabia, alone, produced 40% of all tweets in the Arab world, while Egypt produced 17% and Kuwait produced 10%

Figure 38: No. of Tweets in the Arab region - (under 5 million) during March 2014

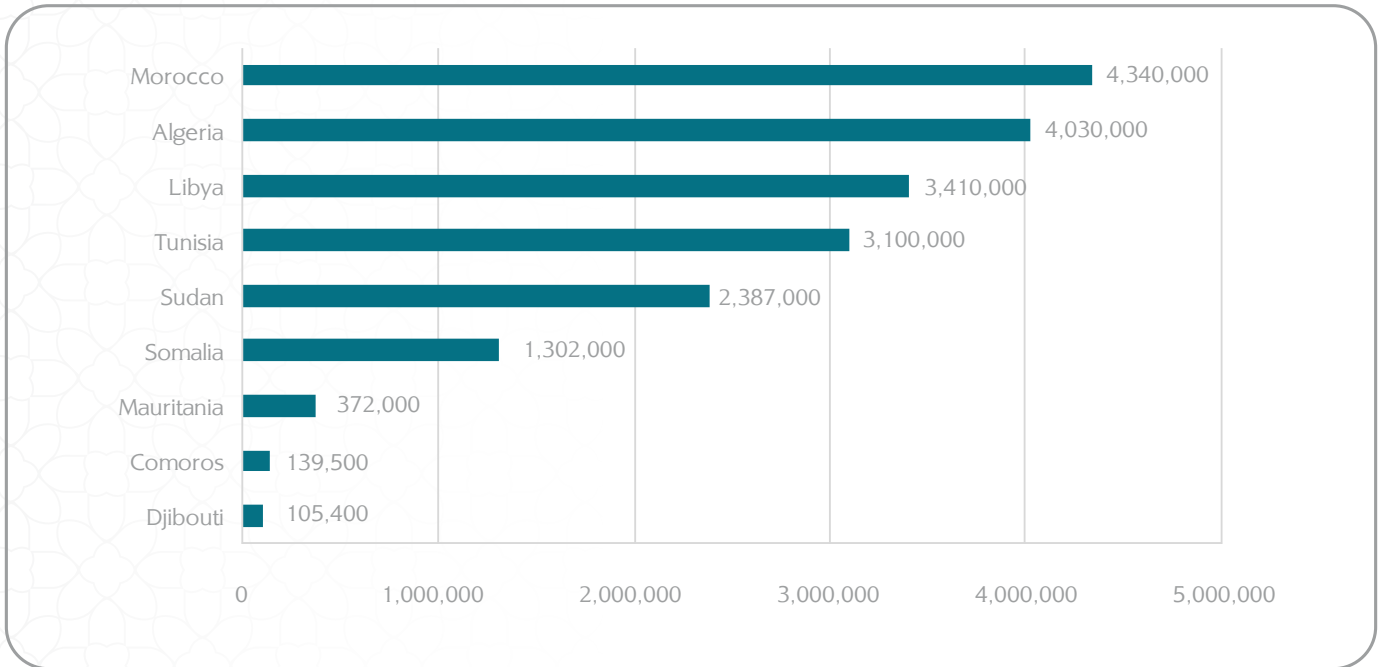
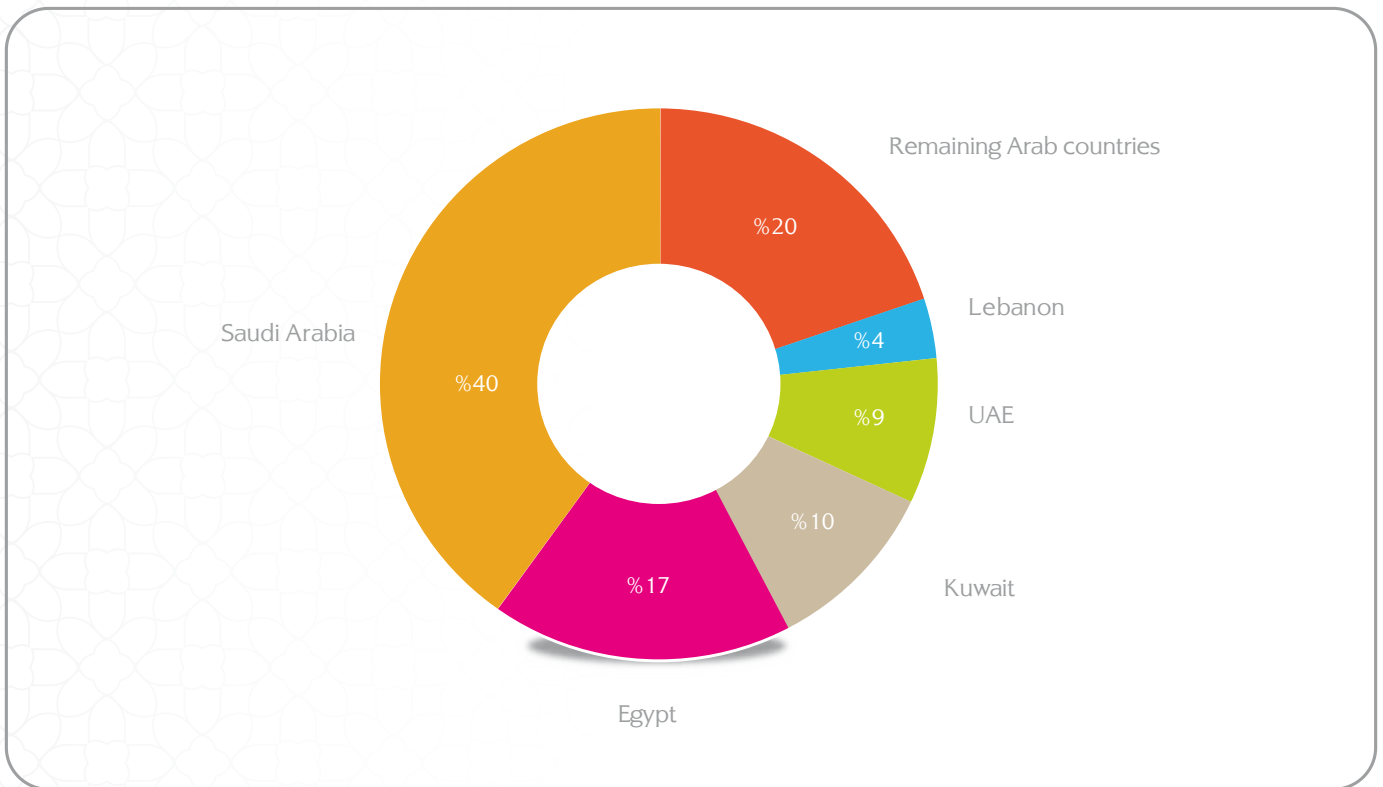


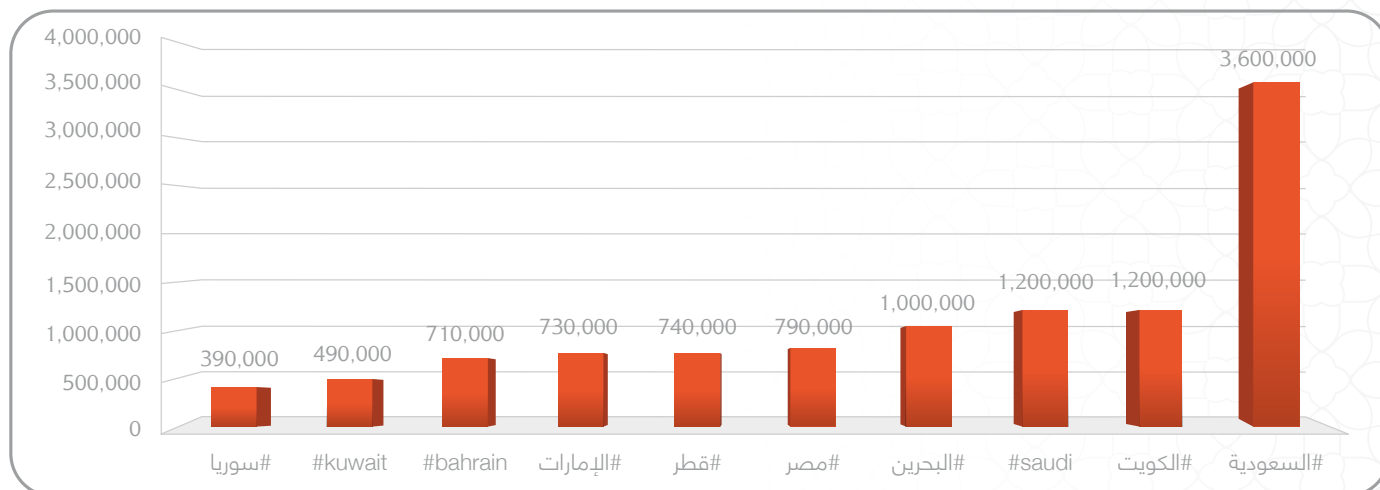
Figure 39: Breakdown of Tweets in the Arab Region (during March 2014)



Twitter Usage Trends in the Arab Region

The top trending country hashtags were estimated during the month of March 2014. Across the region, the top ten country hashtags used (in terms of mentions) are illustrated in Figure 40.

Figure 40: Top Twitter Trends in the Arab Region (Number of country hashtags mentioned - Mar 2014)



As for the languages in which tweets are produced, Arab tweets account for over 75% of all tweets in the Arab world. This represents almost no change (around 1% higher) in the percentage of Arabic tweets since March 2013. Arabic dominates the tweets produced in Saudi Arabia, Kuwait and Egypt, three of the countries that generate the largest number of tweets in the region. Meanwhile Saudi Arabia generates 92% of its Tweets in Arabic, and consequently 50% of Arabic tweets in the region. The UAE and Lebanon, however, have seen a slight decrease in Arabic tweets over the past year (Figures 41 and 42).

Figure 41: Percentage of Tweets in the Arab Region by Language (March 2012, 2013 & 2014)

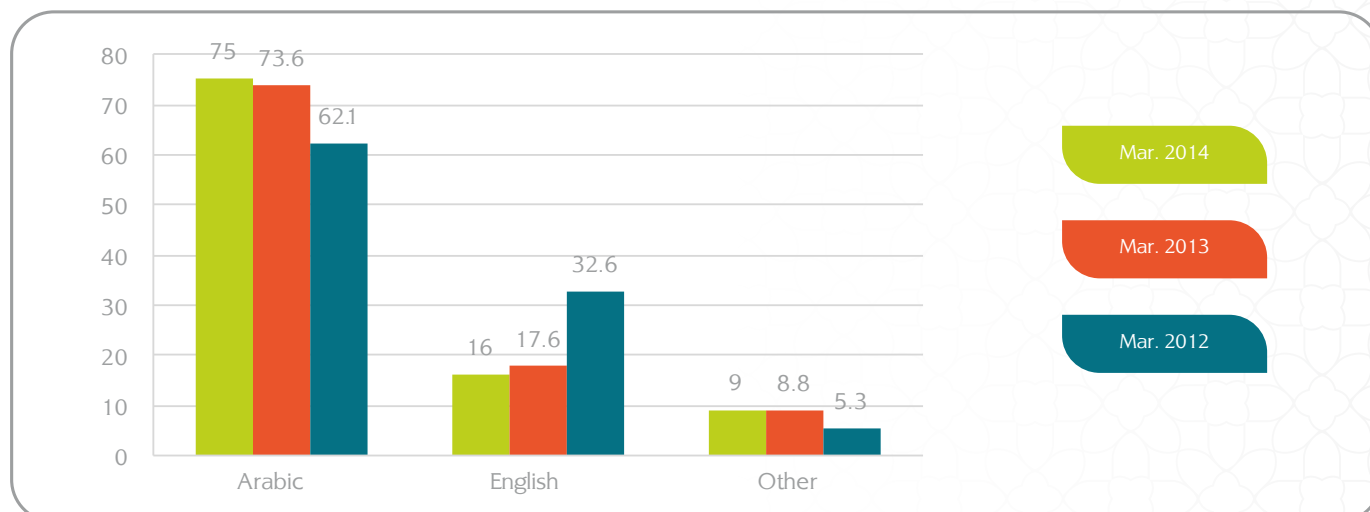
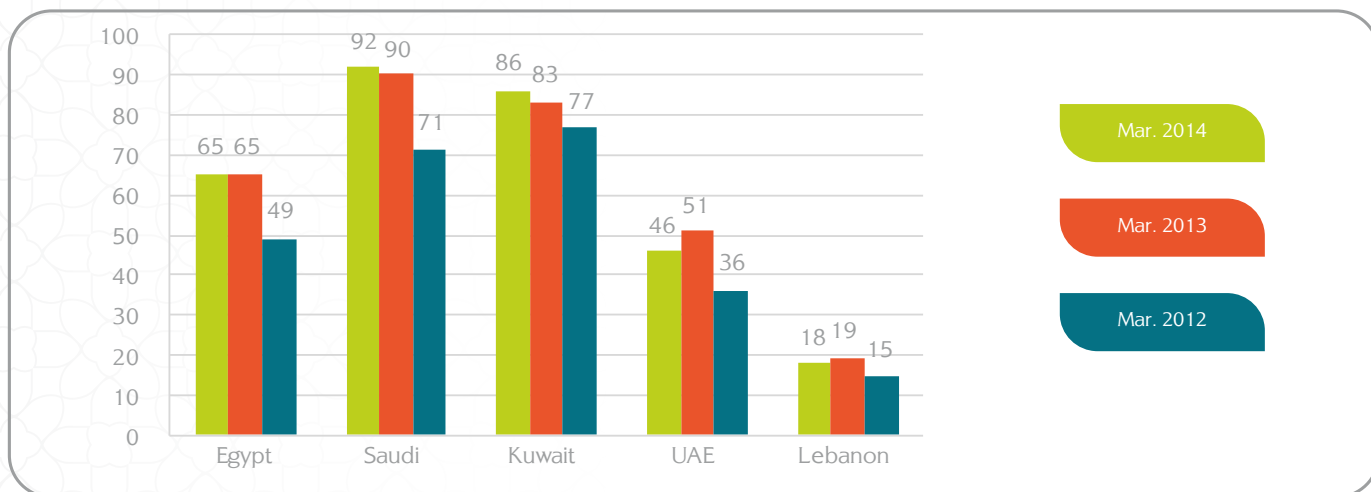


Figure 42: Percentage of Tweets in Arabic - Top 5 Twitter Populations (March 2012, 2013 & 2014)



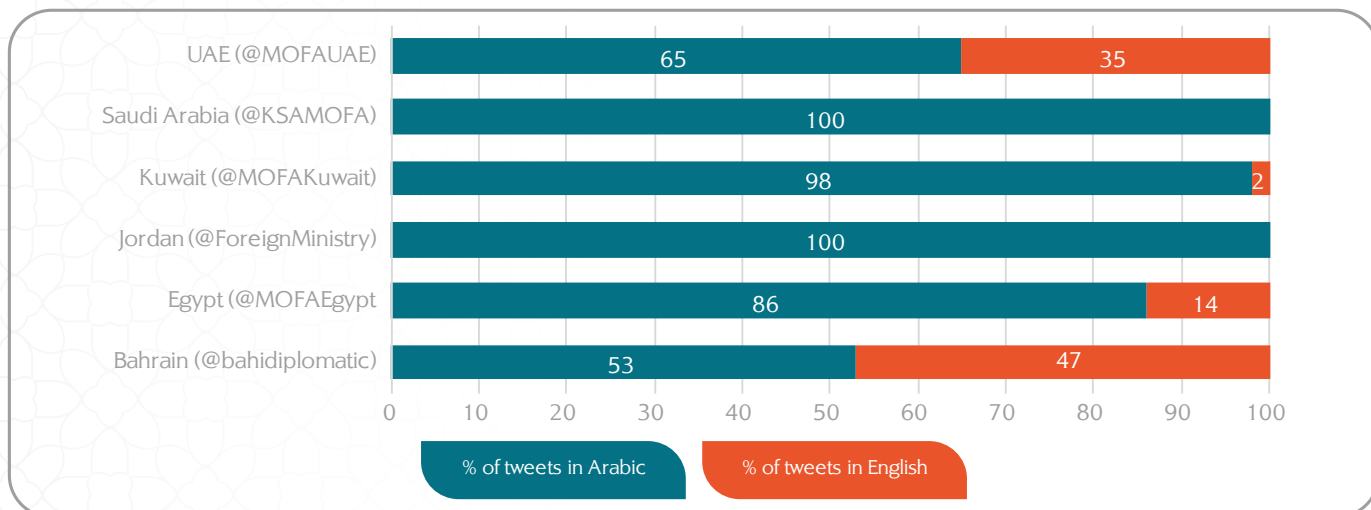
Tweeting the Government:

To further explore the use of social media for citizen engagement on government services design and delivery in the Arab region, we investigated the tweets produced by selected government entities in the region and the number of tweets that mention these government entities. Specifically, this section will report on the language in which tweets by government or at government are produced. These estimates were calculated by collecting every tweet produced by the select government accounts in the region and every tweet produced that mentioned that government account in a two-week period in March 2014 (e.g. @MoF, @MoE, @Mol etc.)

Ministries of Foreign Affairs

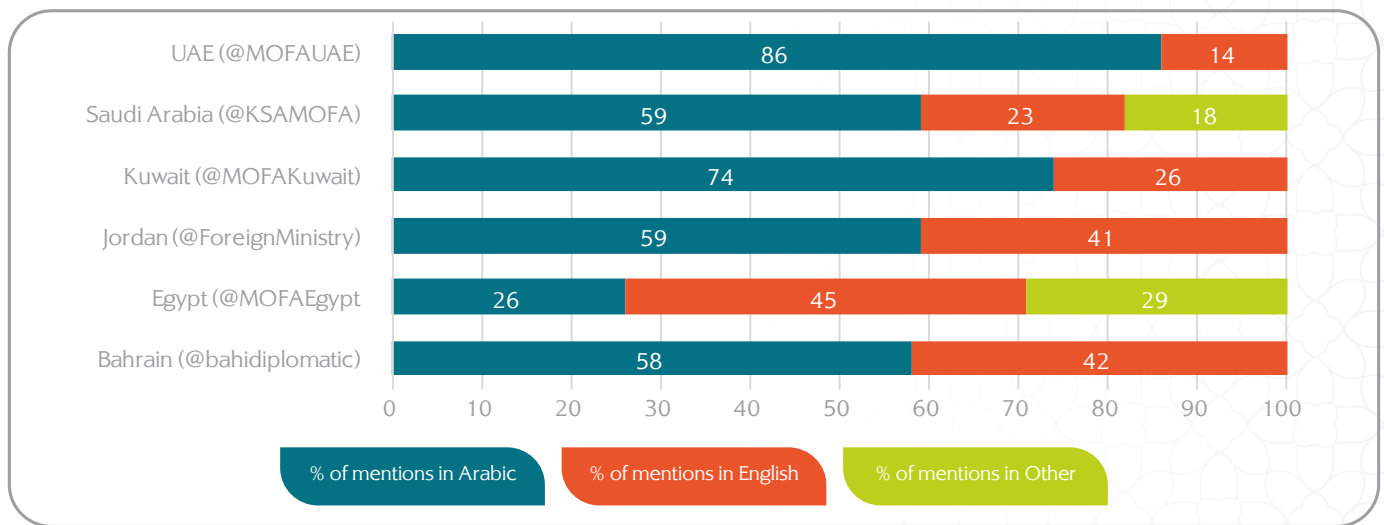
By and large, Ministries of Foreign Affairs in the region tweet in Arabic. The only notable exceptions to this are in the UAE and Bahrain where 35% and 47% of tweets respectively are produced in English (Figure 43).

Figure 43: Ministry of Foreign Affairs Twitter accounts in select Arab countries - Language breakdown of tweets



Tweets to Ministries of Foreign Affairs or those mentioning them were primarily in Arabic, although tweets mentioning the Ministry of Foreign Affairs in Jordan and Bahrain Egypt were equally distributed in both Arabic and English. The Ministry of Foreign Affairs in Egypt, received the largest percentage of mentions in English, followed by Arabic. Tweets mentioning these ministries in Egypt and Saudi were also in other languages, including French, Spanish and Italian (Figure 44).

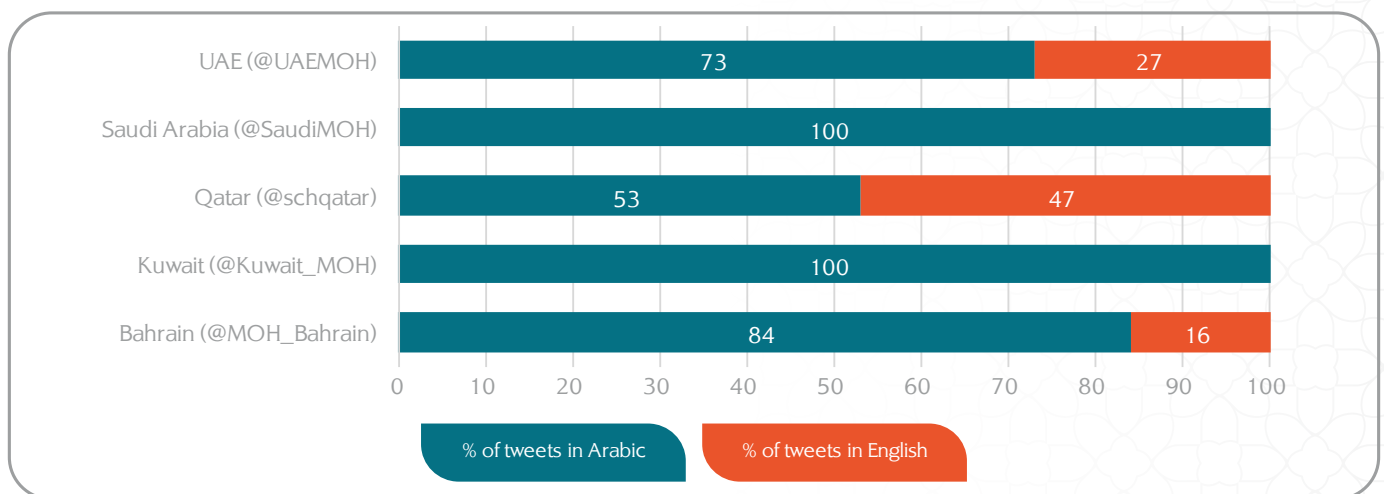
Figure 44: Ministry of Foreign Affairs Twitter accounts in select Arab countries - Language breakdown of mentions



Ministries of Health

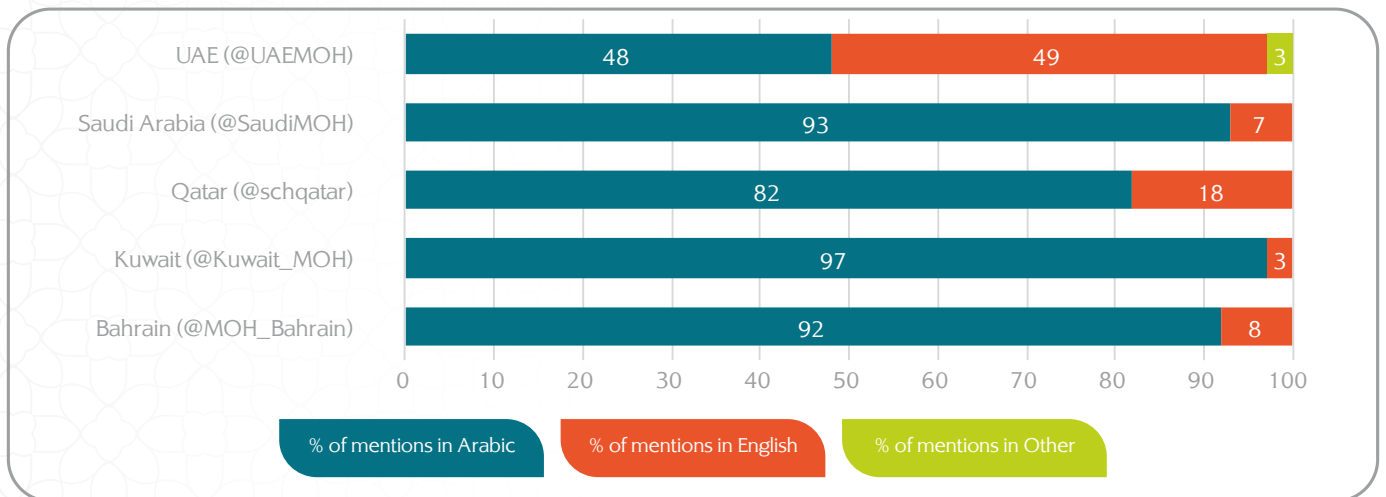
Similar to other government accounts, ministries of health in the region primarily tweet in Arabic with the exception of Qatar. This is especially true in Kuwait where the Ministry of Health tweets only in Arabic language (Figure 45).

Figure 45: Ministry of Health Twitter accounts in select Arab countries - Language breakdown of tweets



The proportion of Arabic to English mentions was similar to the proportion of Arabic to English tweets by the ministries, with the exception of Qatar, where mentions of the Ministry of Health were largely in Arabic, and the UAE Ministry of Health, which received most of its mentions in English (Figure 46).

Figure 46: Ministry of Health Twitter accounts in select Arab countries - Language breakdown of mentions



Ministries of Education

Given their local target 'customers', the ministries of education tweet almost exclusively in Arabic (Figure 47). Similarly, tweets mentioning the ministries of education are produced primarily in Arabic, with the Ministry of Education in Qatar receiving the largest percentage (12%) of non-Arabic mentions (Figure 48).

Figure 47: Ministry of Education Twitter accounts in select Arab countries - Language breakdown of tweets

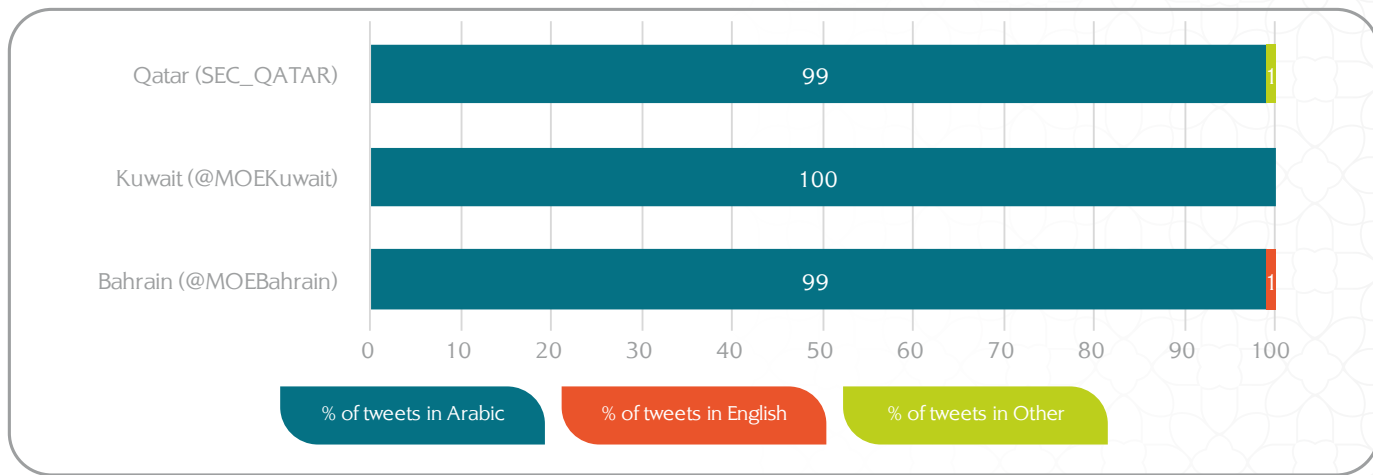
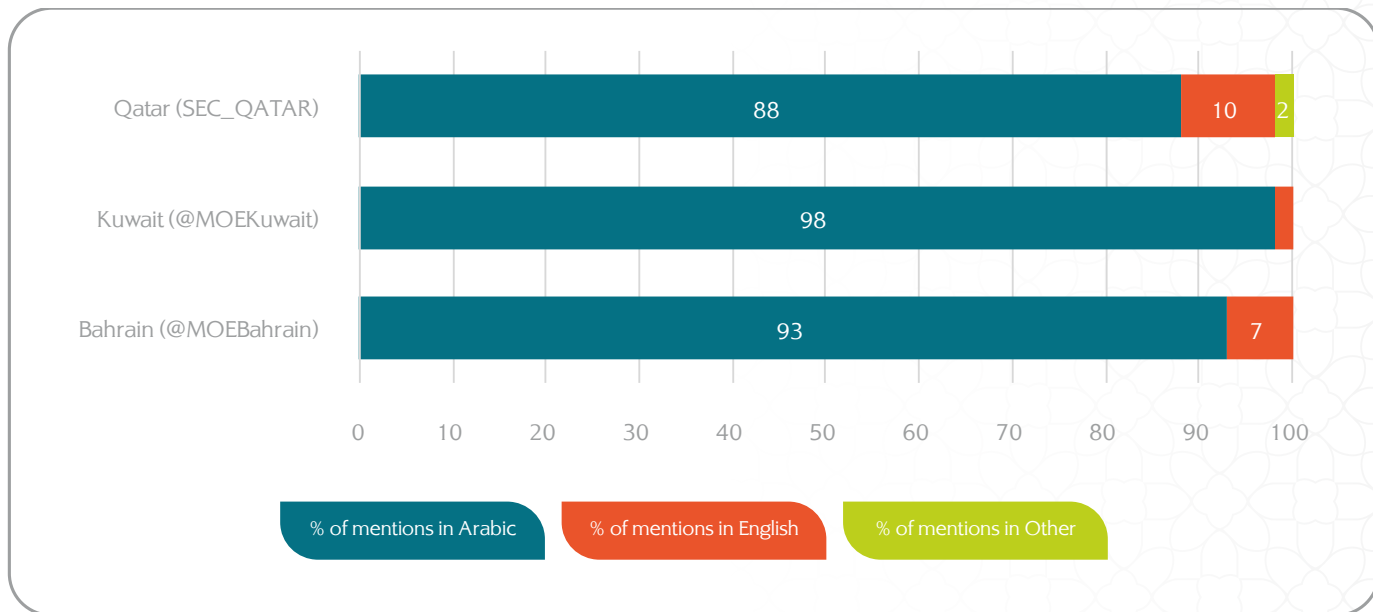


Figure 48: Ministry of Education Twitter accounts in select Arab countries - Language breakdown of mentions



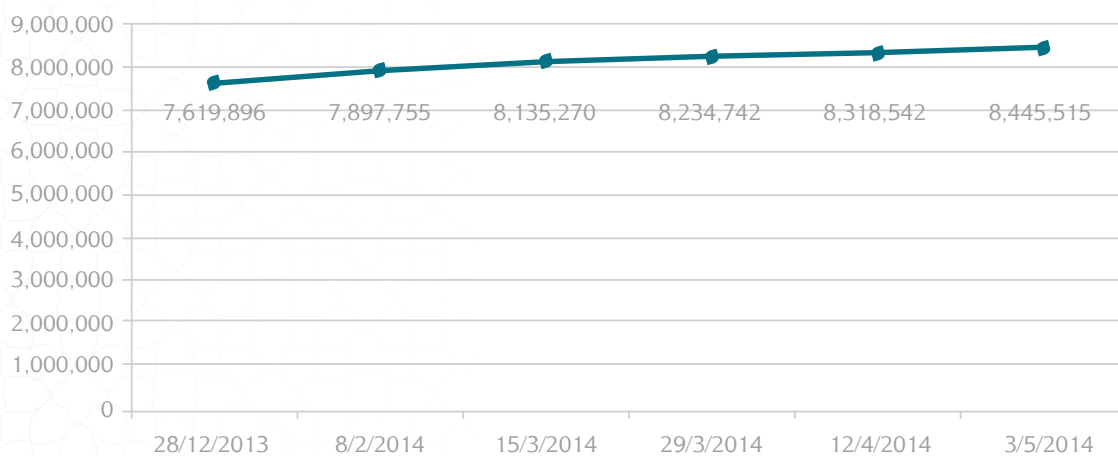
3.3. Mapping LinkedIn in the Arab World – 1st half of 2014

LinkedIn in the Arab World: A Snapshot

- The total number of LinkedIn users in the Arab world stands at 8,445,515 as of May 2014. This is up from 4,716,515 in May 2013.
- As of May 2014, the average LinkedIn penetration amongst Arab countries was 3.7% almost doubling from 2.1% in May 2013.
- As with Facebook and Twitter, the ratio of female to male LinkedIn users in the Arab world is well below the global average. As of May 2014 female LinkedIn users constitute about 29% of LinkedIn users, increasing slightly from 26% in May 2013.
- Youth below the age of 35 still constitute the majority of LinkedIn users in the region, and have shown a significant increase since last year. As of May 2014, 68% of LinkedIn users were between the ages of 18-35 compared to 60% in May 2013.
- Egypt, Algeria, Tunisia and Morocco, specifically have shown considerable growth in this younger age bracket over the past year.

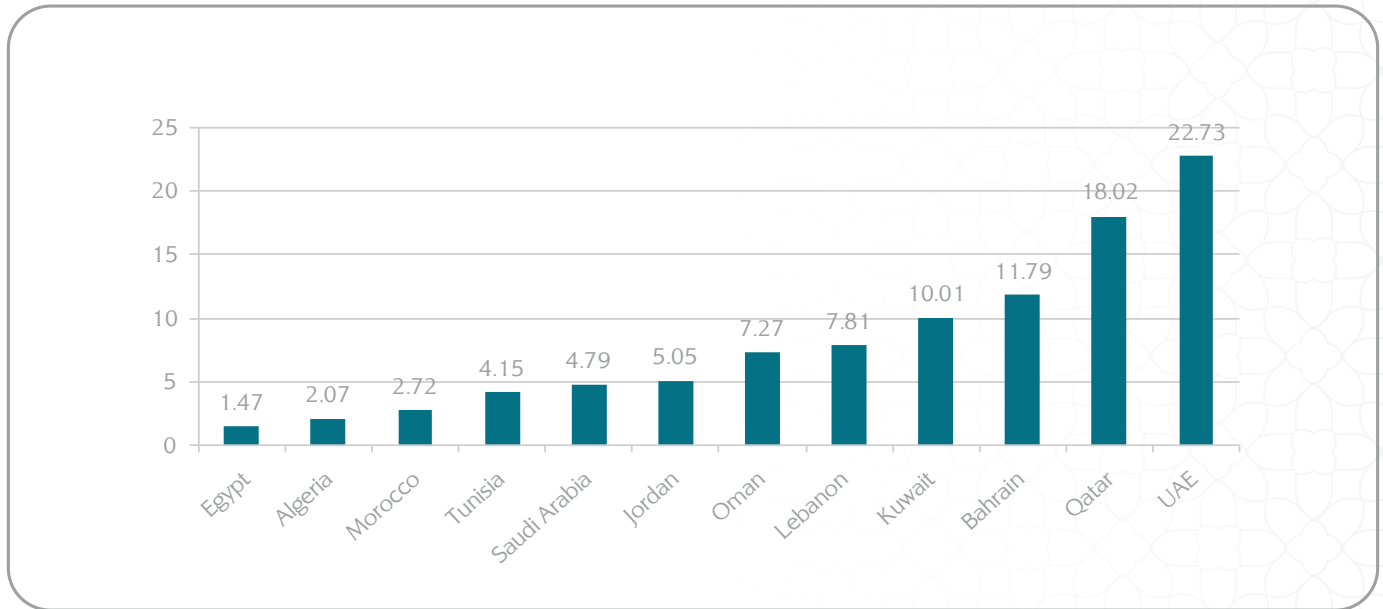
As of May 2014 there are over 8.5 million LinkedIn users in the Arab world up from 7.9 million users in January 2014. LinkedIn penetration has increased across the board, while it remains highest in the UAE (Figures 49 and 50).

Figure 49: Number of LinkedIn Users* in the Arab Region (Jan - May 2014)



*Combined Total for: Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and UAE

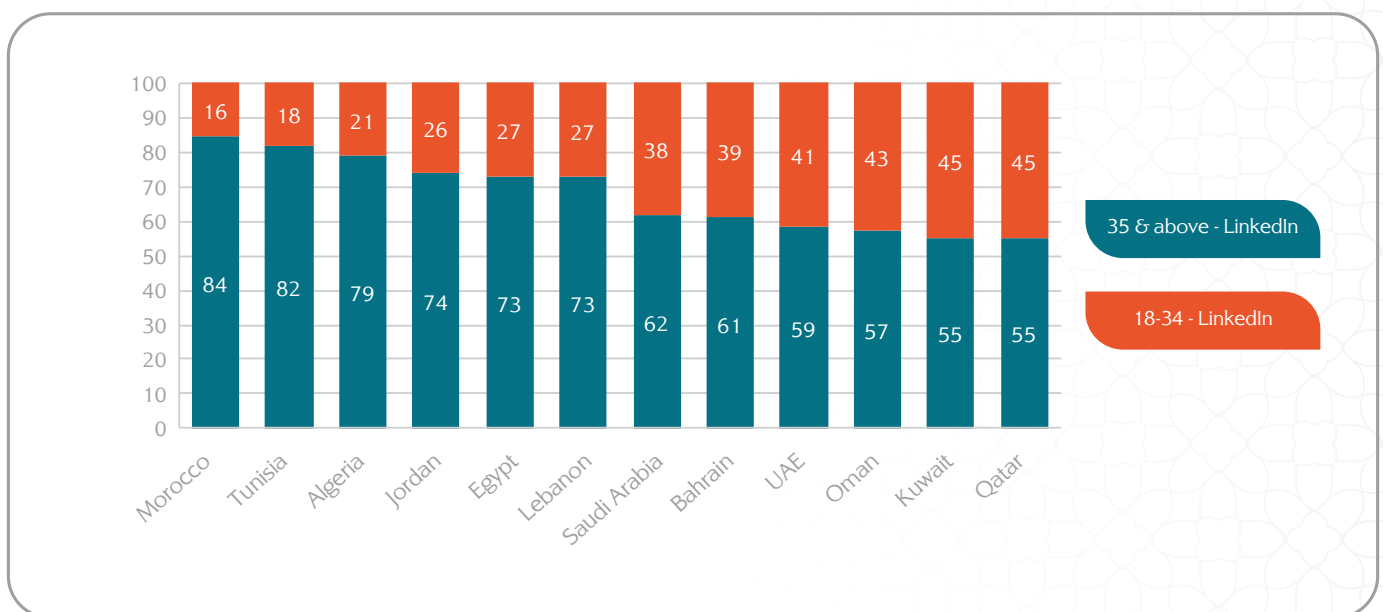
Figure 50: LinkedIn Penetration - May 2014 (% of population)



LinkedIn Demographic breakdown

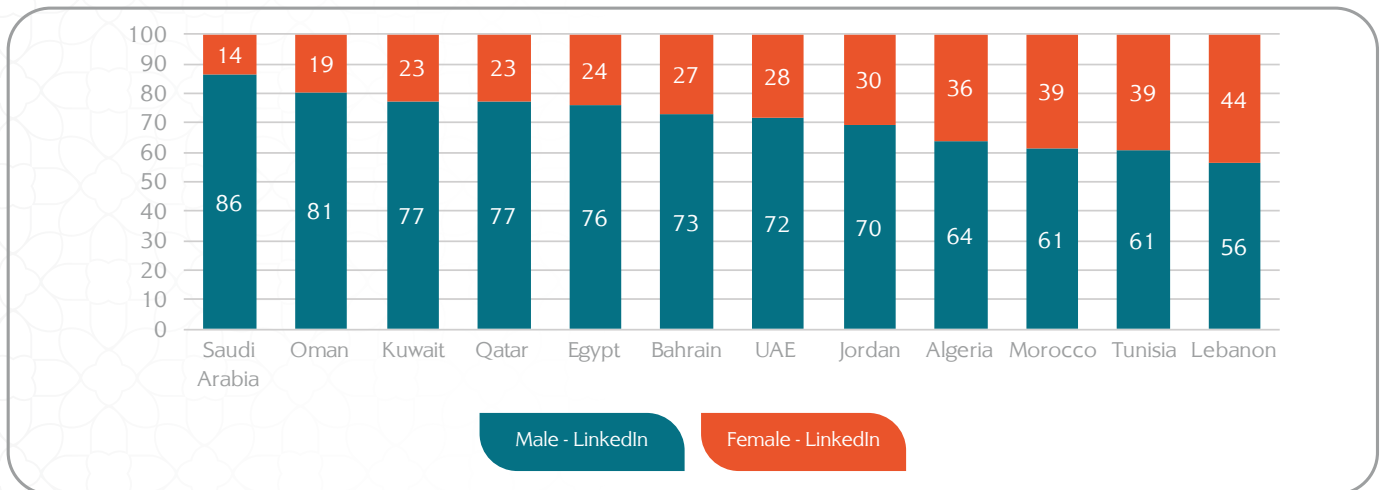
Youth make up the majority of LinkedIn users, at a percentage (68%) that is comparable to that of young Facebook users and also indicates considerable growth from last May, where LinkedIn users between 18 and 34 constituted 60% of users. This is primarily due to the growth in young users in Egypt, Algeria, Tunisia and Morocco (Figure 51).

Figure 51: Demographic Breakdown of LinkedIn Users in Select Arab Countries (May 2014)



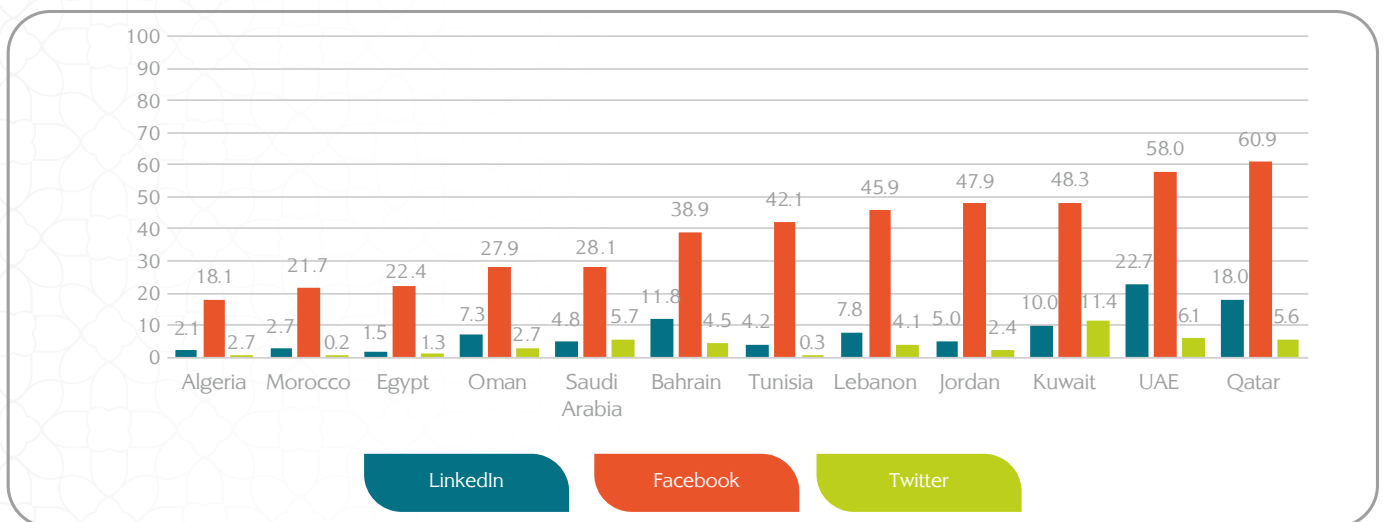
As with Facebook the gender ratio on LinkedIn is well below the global average. About 29% of LinkedIn users in the Arab world are female compared to a global average of 44%¹⁷. Lebanon continues to be the most gender balanced in terms of LinkedIn users followed by Tunisia, Morocco, and Algeria. With the exception of Jordan, all Arab countries have shown a slight increase in the number of female LinkedIn users.

Figure 52: Gender Breakdown of LinkedIn Users in Select Arab Countries (May 2014)



A comparison of the penetration of different social networks in the Arab world shows that Facebook remains the most popular social media platform in the Arab world. Despite its strong growth, Twitter remains the platform with the smallest penetration rates in the region among the three platforms. The UAE tops the list in terms of LinkedIn penetration, while Qatar ranks highest in terms of Facebook penetration, and Kuwait leads the region in terms of Twitter penetration (Figure 53).

Figure 53: Penetration of Social Media Sites in Select Arab Countries - March 2013 (% of population)



17. <https://www.linkedin.com/ads/>

Regional Overview of Facebook, Twitter & LinkedIn

Facebook has continued to see growth in all countries in the region (49% since last May), with significant growth in the GCC - Qatar, especially, having almost doubled its number of Facebook users in the last year. The number of High Penetration countries has increased, to include Kuwait, Bahrain, and Palestine this year.

Female participation in Facebook remains well below the global average at 32.75%, and has seen a slight dip since last May.

Percentage of Facebook users between the ages of 15 and 29 has decreased marginally to 67% of all users. While youth still drive Facebook growth, we are seeing an incremental uptake by users above the age of 30.

Twitter users have the largest percentage of female users - at 36.6% - of the three social media platforms, although that is also below the world average.

Overall, the number of Twitter users in the region has increased by around 54% since March 2013. The UAE and Qatar have joined Kuwait as the countries with more than 5% of their population on Twitter.

LinkedIn user base in the Arab region has increased by 79% in the last year.

As with Facebook and Twitter, the ratio of female to male LinkedIn users in the Arab world is well below the global average, although it is the only platform of the three to have seen an increase in the number of female users since last June. As of May 2014, female LinkedIn users constitute about 29% of LinkedIn users.

Users below the age of 35 still constitute the majority of LinkedIn users in the region and have increased considerably from last year, up to 68% of all users.

Annex 1

Facebook data

The number of Facebook users in all 22 Arab countries, was collected periodically between June 25, 2013 and May 1, 2014, with breakdowns for men and women, and 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 and Sudan (Group B), for which data was extracted from a source other than Facebook. Because of US imposed technology export sanctions, no data on the number of Facebook users in Syria and Sudan is available. The actual number of Facebook users in Syria (in November 2007) was located through online research; no such data for Sudan was found. For that reason, all Facebook data on Sudan in this report was estimated using the daily growth rate of Arab users (calculated from the Group A countries over different periods different periods for different reports - between January 5 and April 5, 2011 ; between January 3 and April 3, 2012; between January 7th and February 18th; and August 10 and November 9, 2013). 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 blocked 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. 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.

In order to maintain accuracy, the average daily growth rate for Yemen was recalculated at several points in time and applied to generate the number of Syrian Facebook users.

It should be noted that for all charts in this paper, the numbers of Facebook users in Syria and Sudan 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 in the month of March 2014 by sampling 733,000 Twitter users and 2.47 million tweets. The study was conducted using a specially developed Twitter API. For the first time, gender breakdowns of Twitter users in each country were included in the data collection. Additionally, data related to government Twitter accounts were collected during the month of March 2014 as well.

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 for finding 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 unlocatable 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.

In this report, an additional correction was applied for unlocatable users in Saudi Arabia, incorporating the number of virtual private network (VPN) users that may have been incorrectly geo-located by passive web analytics. According to Global Web Index findings, 28% of internet users aged 16-64 globally say that they have used VPNs (virtual private networks) to go online. Some 44% of this group report using them in order to access social platforms like Facebook and Twitter – a figure which translates to nearly 185 million people¹⁸. Although there are other Arab countries with a significant percentage of VPN users, not all VPN users mask their location, and therefore would have been correctly accounted for. Users in certain countries, such as Saudi Arabia, have both higher incidences of masking their locations, and larger numbers of undisclosed VPN users, due to a stricter regulatory environment surrounding Internet access. This in turn would lead to an inaccurate number of VPN users, and a larger number of unlocatable users in Saudi. As such, a correction was applied to the estimated number of Twitter users, based on the top market for VPN users, which would more accurately reflect the number of users in Saudi Arabia.

LinkedIn data

The number of LinkedIn users in 12 Arab countries: Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the UAE, was collected periodically between June 25, 2013 and May 1, 2014, with breakdowns for men and women, and in the following age brackets: 18-24, 25-34, 35-54, 55 and above. Due to changes in the examined platform analyzed here, estimated numbers of users from several countries differ in previous report findings.

This could be due to changes, or corrections, in the criteria of geo-locating users by the platform itself. Attempts by the authors to examine the changes in the criteria with the platform were not successful, however, our analysis suggests that the current number in the Arab countries examined are more geographically representative.

Regional Survey on Social Media and Citizen Engagement

The regional online survey was administered in 22 Arab countries and ran from Feb – May 2014. Respondents numbered a total of 3654.

18. Global Web Index (2014).

This sample was comprised of two smaller samples: the 'no demographics' group of respondents, who did not provide their demographic data in the survey, and the group of respondents who provided their 'demographic' data. They numbered at 692 respondents and 2962 respondents, respectively.

In the 'demographics' sample, around 25% of respondents were female while 75% were male. Around 13% of respondents were between the ages of 18 and 24, 44% were between the ages of 25 and 34, and 23% were between 35 and 44. Around 90% of respondents said they have children. The largest number of responses came from Egypt (24%), Saudi Arabia (20%), UAE (11%), Algeria (9%), Sudan (7%) and Jordan (7%).

Although the 'no-demographics' sample did not fill out demographics questions, their locations were identified and analyzed, and their geographical distribution mirrored that of the 'demographics'. Gender and age statistics could not be collected for the no demographics' sample, but given the even geographical distribution of the entire sample, one can assume this applies to gender and age as well.

For certain question breakdowns, respondents were also divided into country income brackets, as per the World Bank's classifications: <http://data.worldbank.org/about/country-classifications>. These corresponded to:

High Income: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE

Upper Middle Income: Algeria, Iraq, Jordan, Lebanon, Libya, and Tunisia

Lower Middle Income: Egypt, Mauritania, Morocco, Palestine, Sudan, Syria and Yemen

Low income countries (Comoro, Djibouti, and Somalia) were excluded from this breakdown due to their small, and therefore unrepresentative, sample size, which would increase the margin of error.

The charts depicting the findings related to these breakdowns only included the 'demographics' sample, given that the respondents could not be classified into country income brackets without the demographic information. However, comparing the responses of 'no-demographics' sample to 'demographics' sample showed a high similarity and would indicate the possibility of generalizing the 'demographics' breakdowns to the entire sample.

Some questions specifically targeted government officials and as such were only answered by a smaller pool of respondents who had stated that they work in the public sector. The geographic distribution of this sample (708 respondents) differs from the full sample, with majority of respondents coming from: Egypt (21%), Algeria (19%), Saudi Arabia (12%), Sudan (11%), and UAE (10%).

Annex 2

Special Acknowledgement ¹⁹

Connecting and Empowering Citizen and Government Employees: A case of public-private partnership

Our research for this edition of the Arab Social Media Report has indicated that one of the top challenges facing citizen engagement with government entities and public services through social media is a lack of government employee capacity and training. Building government entities' skills in engaging with citizens through social media is key to the delivery of more citizen-centric public services, and as such capacity building for government officials in the region, to enable them to better perform in their jobs, is a priority.

While Bayt.com started out as a regional online recruitment portal in 2000, it has kept abreast of social media trends and expanded into a social platform where professionals can find jobs, advance their careers, curate and share professional content and network with peers across industries and sectors. It also allows users to utilize social features and tools that will enhance their online visibility, grow their knowledge base, and network with other professionals and companies across both the public and private sector.

In fact, over the years Bayt.com has built a very strong presence with the public sector all around the MENA region not only by enabling their recruitment drives at every career level but also by empowering governmental institutions all around the MENA with tools and technologies to assist their citizens. It provides various solutions ranging from customized career channels, to support in career planning workshops and training seminars, to special CV-writing clinics, to job search strategy workshops and seminars in public universities around the region.

The millions of users in the Bayt community can apply to jobs posted on the site and enjoy career literature, HR research, self-assessment tests, and the socialized professional products needed to enhance and advance their careers and lives. Additionally, they can select their specialties and connect to other professionals who share the same interests and expertise, thereby facilitating fruitful and engaging discussions and driving thought leadership and knowledge creation.

Ultimately, Bayt.com allows its users create a professional online presence that is specifically design for the job market, and to connect, engage with, and learn from a community of like-minded professionals. Building on the power of social technologies, it also lets users connect and discover talent, expertise and mutual interest by searching through their social interactions, thereby giving them the opportunity to expand their skill and knowledge base.

19. The authors would like to acknowledge the contribution of the Bayt.com team to the data collection efforts while conducting the survey.

Annex 3

Additional Data

The content of Annex 3 is available exclusively for members of the ASMR community online on the ASMR website: www.ArabSocialMediaReport.com

Join the Arab Social Media Report community online. Registration (at no cost) will give you access to the following datasets, in addition to unpublished charts:

Number of Facebook Users in the Arab World between June 2010 and May 2014

Country	June '10	Jan. '11	April. '11	June '11	Oct. '11	Jan. '12	June '12	Jan. '13	June '13	Jan '14	June '14
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Facebook Users and Country Populations in the Arab World – May 2014

Country	Number of Facebook users (5/1/2014)	Population*	Facebook penetration (%)	Number of New Facebook users since 1/2/2014	Growth in number of Facebook users since 1/2/2014 (%)	New Facebook users since 1/2/2014 (as % of population)
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Volume of Tweets and Twitter users in the Arab region Q1 - 2014

Country	Estimated Number of Twitter Users (Avg. through March, 2014)	Population*	Twitter penetration (Avg. through March, 2014)	Estimated Tweet Volume (Avg. through March, 2014)
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LinkedIn Users and Country Populations in Select Arab Countries – May 2014

Country	Number of LinkedIn Users (5/1/2014)	Population*	LinkedIn penetration (%)
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Social Media, Internet and Mobile Subscription Rates in the Arab Region – May 2014

Country	Estimated Number of Twitter Users (Avg. through March, 2014)	Twitter penetration (%)	Number of Facebook users (5/1/2014)	Facebook penetration (%)	Number of LinkedIn Users (5/1/2014)	LinkedIn penetration (%)	Internet users per 100**	Mobile subscriptions per 100**
---------	--	-------------------------	-------------------------------------	--------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------------

Language Interface Preferred by Facebook Users* (as a percentage) – Ranked by Arabic

Country	Arabic (% of Facebook users)	English (% of Facebook users)	French (% of Facebook users)
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About the Authors

The Arab Social Media Report series is produced by MBRSG's Governance and Innovation Program, and co-authored by Racha Mourtada and Fadi Salem. This edition of the report is co-authored by: **Racha Mourtada, Fadi Salem** and **Sarah Alshaer**.

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The Governance and Innovation Program at Mohammed Bin Rashid School of Government (MBRSG) 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:

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

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The Mohammed Bin Rashid School of Government (MBRSG) 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, MBRSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Mohammed Bin Rashid School of Government also collaborates with regional and global institutions in delivering 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.

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