

# SOCIAL MEDIA IN THE MIDDLE EAST

## THE STORY OF 2017

Key developments, stories and research findings



Damian Radcliffe and Amanda Lam

**O** UNIVERSITY OF  
OREGON | School of Journalism  
and Communication

# INTRODUCTION AND MARKET CONTEXT

This report is the sixth in a series of annual reports designed to highlight key developments and data related to usage of social media in the Middle East and North Africa.

As in previous reports, this White Paper captures insights from a wide variety of academic, industry and media sources, distilling the key lessons from the past year.

Social Media adoption, and usage, around the world continues to rapidly evolve; and the Middle East is no exception. By capturing the most important takeaways from 2017, we seek to provide researchers, media companies and industry watchers with a snapshot of the essential takeaways from the last twelve months. We carefully reference all of our observations, so that readers can visit the original sources if they want to know more.

We hope you find these findings as insightful, and fascinating, as we do.

Damian Radcliffe and Amanda Lam  
University of Oregon, February 2018

## ABOUT THE AUTHORS



**Damian Radcliffe** is the Carolyn S. Chambers Professor in Journalism at the University of Oregon's School of Journalism and Communication, a Fellow of the Tow Center for Digital Journalism at Columbia University, an Honorary Research Fellow at Cardiff University's School of Journalism, Media, and Culture Studies, and a Fellow of the Royal Society for the Encouragement of Arts, Manufacturers, and Commerce. He tweets [@damianradcliffe](https://twitter.com/damianradcliffe).

An experienced Digital Analyst, Consultant, Journalist and Researcher he worked for Qatar's Ministry of Information and Communications Technology (ictQATAR) from 2012 until 2014. Now based in the USA, Damian continues to write and talk regularly about the Middle East. He has written a monthly column on technology in the Middle East for ZDNet since late 2013; and produced an annual round-up of social media development across the region since 2012.

Damian has also written for a range of other outlets about the Middle East, including: ASDA'A Burson-Marsteller, BBC Academy / BBC College of Journalism, The Conversation, Georgetown University, The Huffington Post, MediaShift, Northwestern University in Qatar, Reuters Institute for the Study of Journalism at Oxford University, Your Middle East and others.

As a speaker on Middle East matters, he has participated as a trainer, keynote, panelist and conference chair, at events in Dubai, Doha, Istanbul, London and Springfield, Virginia.



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## PREVIOUS REPORTS

- 2016 **Damian Radcliffe: Social Media in the Middle East: The Story of 2016**
- 2015 **Damian Radcliffe: Social Media in the Middle East: The Story of 2015**
- 2014 **Damian Radcliffe: Social Media in the Middle East: The Story of 2014**

*Please also see previous annual round-ups produced by Damian when he worked for Qatar's Ministry of Information and Communications Technology ([ictQATAR](#)):*

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



## MARKET CONTEXT: MENA'S YOUTH BULGE AND RAPID DIGITAL GROWTH

It's now six years since the Arab Spring, a period which shone a light on the rise of social media in the Middle East and North Africa (MENA).<sup>1</sup> Since then, the region has continued to undergo a rapid digital transformation.

"Digital is growing faster in the Middle East than anywhere else in the world," Simon Kemp, founder of Kepios, told the technology website ZDNet in March 2017.<sup>2</sup> Kemp, a marketing strategist based in Singapore, has authored six annual studies charting the trends in mobile, the internet, and social media around the globe.

In 2016 (the last year for which Kemp's data is available, at the time of writing, his new reports - covering 2017 will be out soon) social media use was up almost 50%. In Algeria, one of the region's most populous countries, that translated into six million new social-media users in just a single year.

Social media usage has grown due to a variety of factors including growing internet penetration<sup>3</sup> - up from 35.6% in 2011 to 56.4% by March 2017.

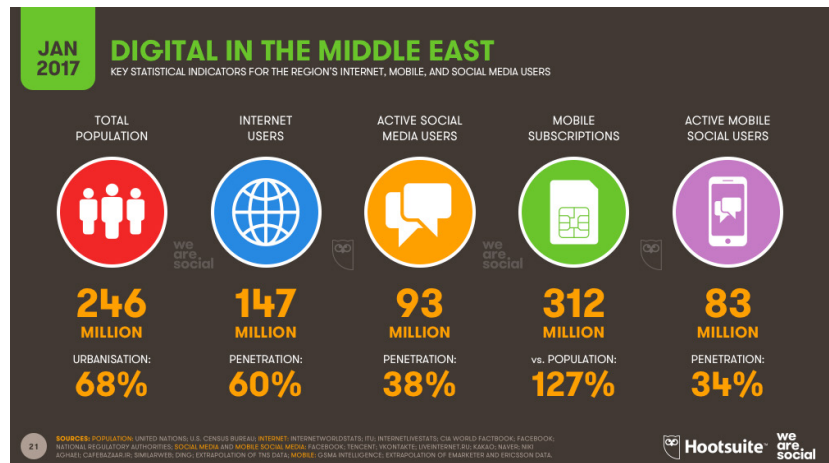
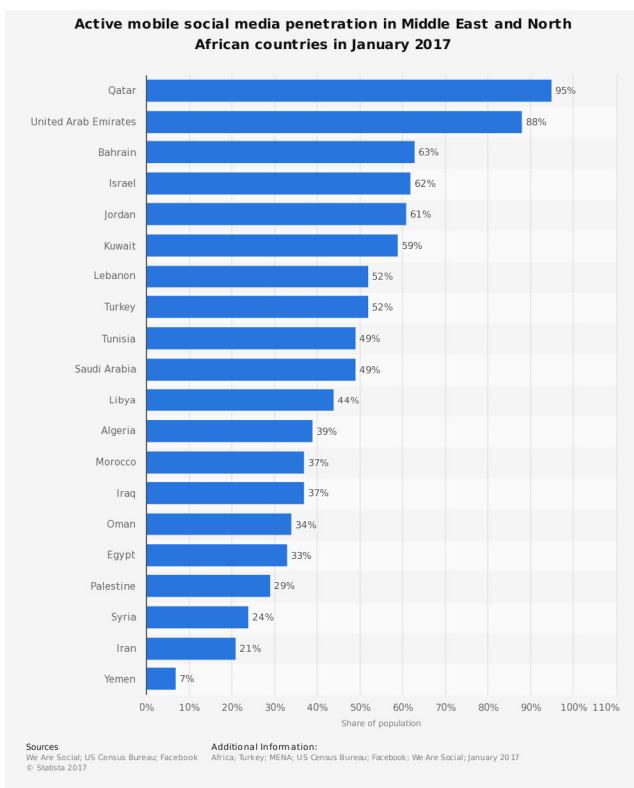


Image: Digital in the Middle East. Source: Hootsuite and We are Social

**Further drivers for social media's growth include the regions young population and high smartphone penetration.**



"In the Middle East," Foreign Policy notes, "a region of some 400 million people, nearly 65 percent of the population is younger than age 30 — the highest proportion of youth to adults in the region's history."<sup>4</sup>

Although smartphone ownership in the region - at just under 50% of mobile connections - is below the global average of 53%, the number of smartphone connections has doubled in three years, to 319 million, according to the trade body, the GMSA<sup>5</sup> This figure is expected to grow to 65% by the end of the decade, in line with the global average.

Usage of smartphones, the internet and social media varies widely across the region, as demonstrated in the chart to the left; and throughout this report.

Image: Active Mobile Social Media Penetration in MENA. Source: Statista

# 1. THE CONTINUED RISE OF MESSAGING APPS

- **WhatsApp is once again the most popular social channel, based on usage**, among Arab Nationals, research by Northwestern University in Qatar found.
  - The reach of the popular messaging application (67%) was just ahead of Facebook (63%) and YouTube (50%).<sup>6</sup>
- **Usage of the group messaging functionality afforded by WhatsApp has grown substantially** in recent years. “Three-quarters of nationals belong to a friend or family DM group and one-half belong to a DM group with people sharing similar interests and hobbies,” Northwestern University in Qatar has noted.<sup>7</sup>

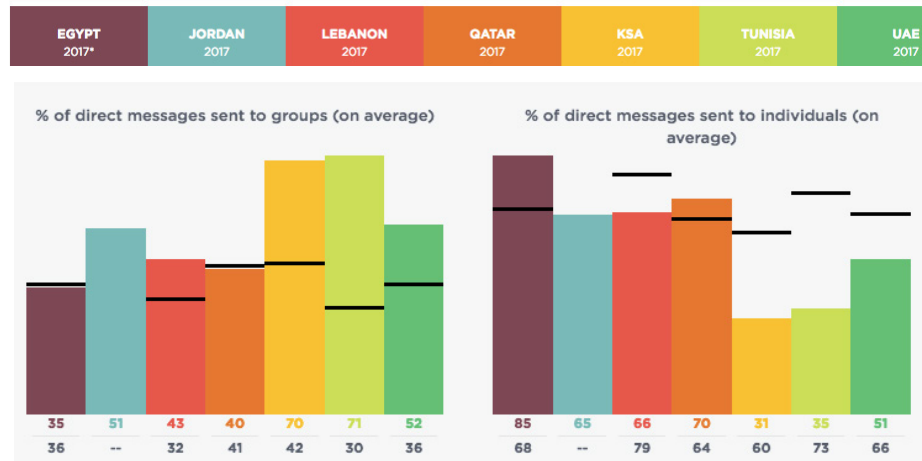


Image: Percentage of Direct Messaging with groups vs. Individuals. Source: Northwestern University in Qatar.

- Despite its popularity, **not all of WhatsApp's functions are accessible** in the region.
  - WhatsApp's video-calling service was introduced in Nov. 2016, but users in UAE cannot access the service due to regulatory issues. WhatsApp and Snapchat calls have historically been blocked in UAE, along with FaceTime.<sup>8</sup>
  - In June 2017, UAE residents briefly enjoyed WhatsApp video and voice calls after restrictions were unblocked. The government blocked it again within a few hours.<sup>9</sup>
- In March, Mara Social Media, a social media firm based in Dubai, acquired the global mobile calling and messaging app Nimbuzz. The app currently has 200 million users across the Middle East and India.<sup>10</sup> Mara Social Media expects use of messaging apps to overtake social media apps globally within the next two years.

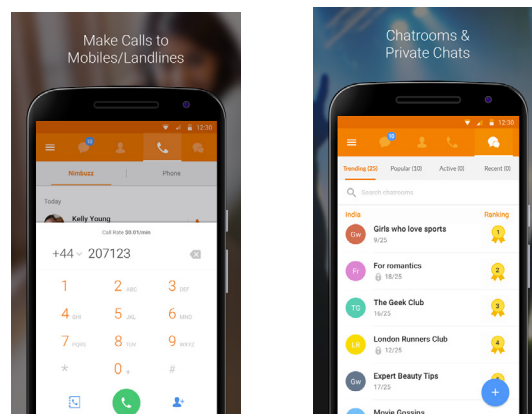


Image: Nimbuzz app features. Source: Google Play

## 2. FACEBOOK'S MIXED YEAR

- Since 2012, Facebook has grown its MENA user base by 264%.<sup>11</sup>
- However, in some Middle East countries, Facebook usage has dropped substantially (-20%) since 2013, according to research from Northwestern University in Qatar (NUQ).
  - Reach among Arab Nationals was 94% in 2013, but 74% in 2017. Since 2015, among nationals, Facebook usership dropped from 76%-55% in Saudi Arabia, in UAE from 83%-70%, and Qatar from 43% to 22%, NUQ found.<sup>12</sup>

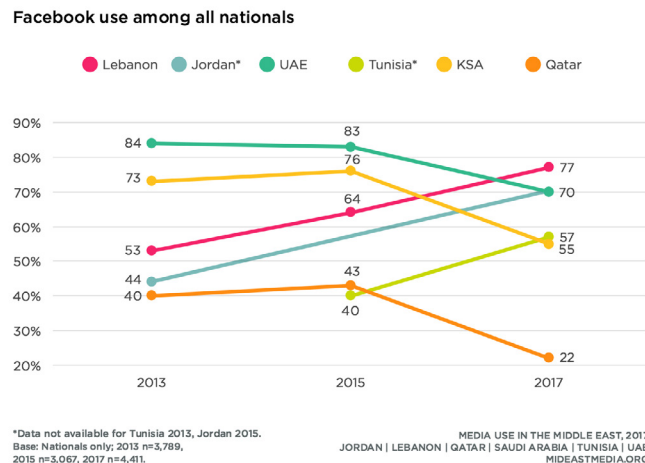


Image: Facebook use among nationals. Source: Northwestern University in Qatar.

- Despite this decline in usage, Jonathan Labin, managing director of Facebook Middle East notes how **users are engaging with a wider range of Facebook products**.
  - NUQ's data supports this highlighting a 400% growth in Facebook Messenger, and 40% growth in Instagram use, Arabian Business reported.<sup>13</sup>
- Egypt remains the MENA country with the biggest number of Facebook users: 17 million.
  - But, this is also the lowest population, based on percentage of users, at 30%.<sup>14</sup>
- In 2017, Facebook opened its new regional headquarters in Dubai (see image below). The social network opened its first office in the region back in 2012.<sup>15</sup>



Image: Facebook's new regional headquarters in Dubai. Source: Arabian Business

### 3. TWITTER'S EXPANSION AND USE/QUERIES BY GOVERNMENTS

- Twitter announced the launch of “Twitter Lite” in April 2017,<sup>16</sup> the app minimizes data usage and is designed to make Twitter more accessible in developing regions where data plans are expensive.
  - In November, **Twitter Lite was rolled out in 24 new countries, including several MENA nations:** namely Algeria, Egypt, Israel and Tunisia.<sup>17</sup>
  - The move follows a trend for social networks to offer more data friendly versions of their products. Facebook launched Messenger Lite in five countries - including Tunisia in late 2016<sup>18</sup> adding 150 further countries including Algeria and Morocco, in April 2017.<sup>19</sup>

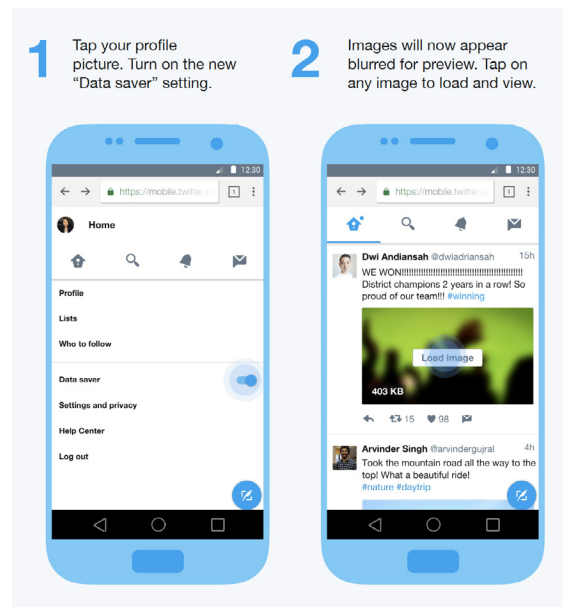


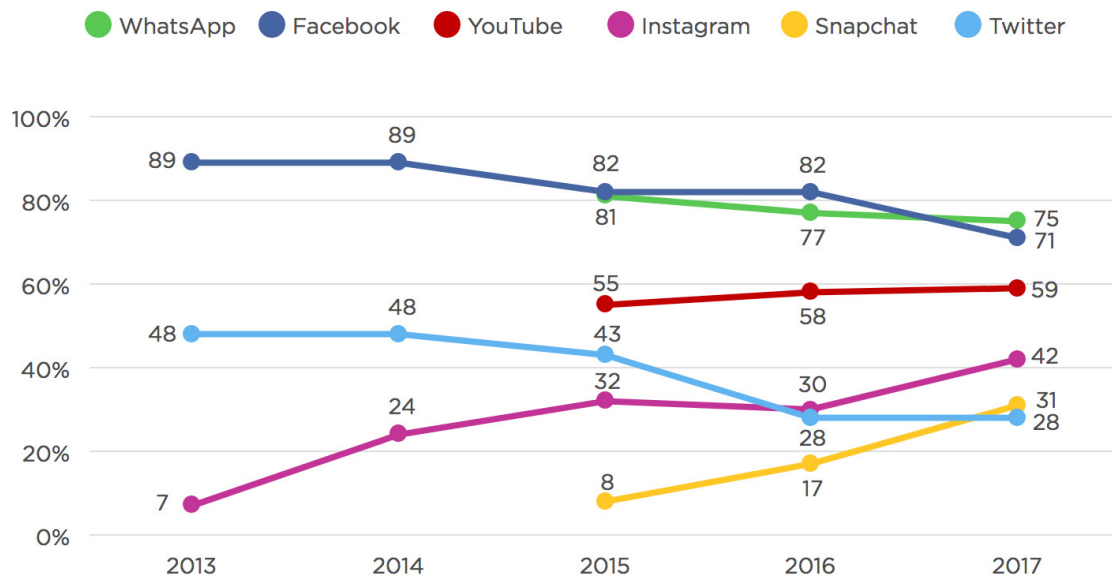
Image: Users can utilize the “data saver” setting on the mobile version of Twitter. Source: Twitter Blog

- In its latest transparency report, Twitter stated it had suspended 935,897 accounts for “promotion of terrorism” between August 2015 and June 30 2017, including 299,649 accounts in the first half of 2017.<sup>20</sup> Less than 1% of these suspensions stemmed from government requests.
  - **Turkey submitted 8.5% (554) of all Government issued information requests submitted to the social network in the first half of 2017,** related to 902 accounts.
  - The Turkish government also made 31 “emergency disclosure” requests during this period, ahead of UAE (27) but behind Saudi Arabia (47).
  - Nations outside of the region such as the United States (368 requests / 33% of total emergency disclosure requests), Japan (152 / 14%), and the United Kingdom (108 / 10% of total) nonetheless made more requests.<sup>21</sup>
- Analysis shows that, **when it comes to Twipolomacy, in the Gulf region, foreign ministers were most likely to use Twitter to tweet about Syria** (12.4% of all tweets), minister visits (10.8%), and the GCC (10%).<sup>22</sup>
  - 65.1% of tweets were in Arabic and 34.9% were in English.

## 4. INSTAGRAM CONTINUES TO GROW RAPIDLY

- There are 63 million Instagram users in the MENA region, equivalent to 10% of total global users.<sup>23</sup> (In contrast, the region is home to just over 3% of the global population.)<sup>24</sup>
- Usage has grown from 7% of MENA's internet users in 2013 to 42% by 2017, according to research in the media habits of Arab Nationals by Northwestern University in Qatar.

**% who use the following social media platforms**  
(among internet users)



\*Jordan not included in calculations.

Base: Nationals, internet users; 2013 n=2,610,  
2014 n=2,426, 2015 n=2,247, 2016 n=3,355, 2017 n=3,068.

MEDIA USE IN THE MIDDLE EAST, 2017  
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
MIDEASTMEDIA.ORG

Image: Daily social media usage. Source: Arab Youth Survey, 2017.



Image: Twitter profile picture of Jonathan Labin.  
Source: @JonLabin.

- Usage of the network is a source of “good news for businesses in MENA,” says Jonathan Labin, managing director of Facebook Middle East.

“We know that more than 70% of Instagrammers follow a business, with 75% saying that they take action after seeing a post, from visiting a website to searching, shopping or telling a friend.”<sup>25</sup>



- In 2017, **Istanbul was the ninth most Instagrammed city in the world**, behind New York, Moscow, London, Sao Paulo, Paris, Los Angeles, Saint Petersburg and Jakarta.<sup>26</sup>
- Dubai was the fourth most hashtagged city on Instagram between June 2015 and July 2016.<sup>27</sup>

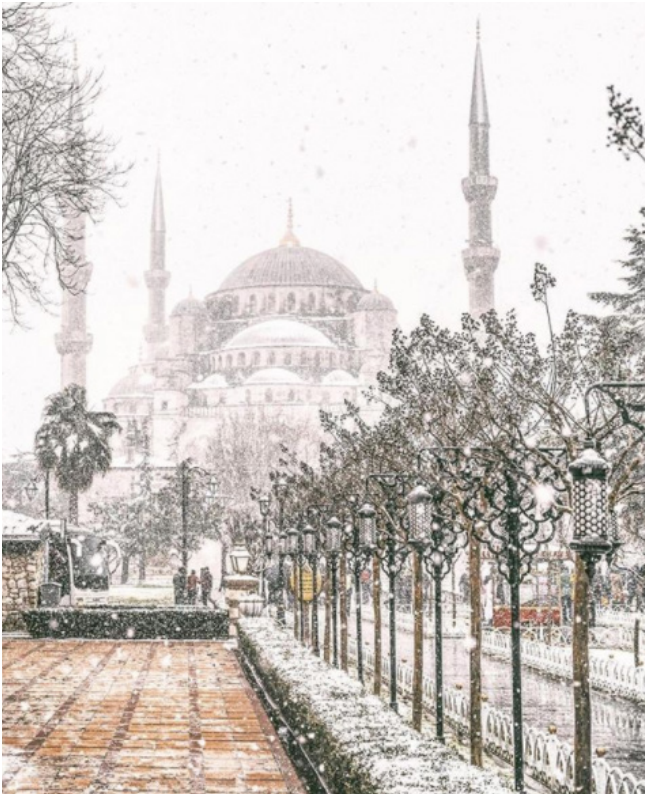


Image: Post from @Istanbul Instagram by @tolgy75.



Image: Post from @Dubai Instagram by @adrianredcom.

- **The visual social network is also growing fast among young people in the region**, with daily usage up 20% according to the annual Arab Youth Survey.<sup>28</sup>

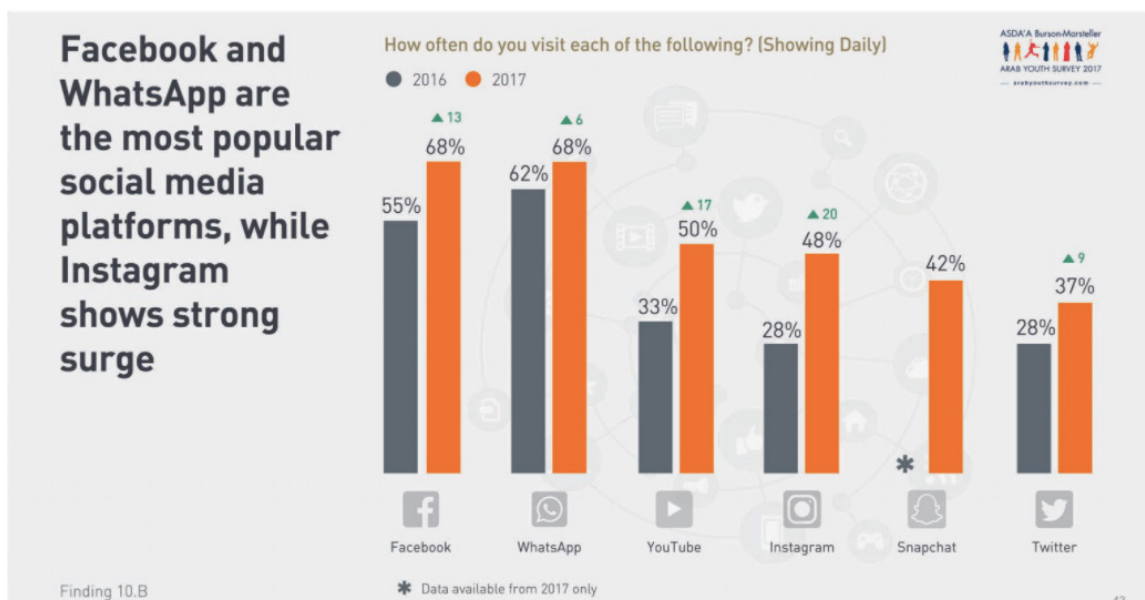


Image: Daily social media usage. Source: Arab Youth Survey, 2017.

## 5. SNAPCHAT EXPANDS ITS MENA OPERATION AND USER BASE

- Snapchat has **33 million users**, according to Snapchat's own data, as reported by Wallaroo Media, a Social Advertising & Digital Marketing Agency.<sup>29</sup>

### Snapchat Users (Breakdown by Country)

Saudi Arabia - 13,425,000  
Qatar - 525,000  
UAE - 1,950,000  
Egypt - 2,650,000  
Israel - 1,375,000  
Turkey - 8,500,000  
Oman - 675,000  
Lebanon - 725,000  
Jordan - 1,400,000  
Bahrain - 500,000

- The app is especially popular in Saudi Arabia with anywhere between 7 million<sup>30</sup> and 8.2 million daily users.<sup>31</sup>
  - The Kingdom is home to c.33 million people, meaning between **21%-25% of the Saudi population use the ephemeral messaging service each day.**
- It's therefore no surprise, that in February 2017, **Snapchat opened its first Middle East office in Dubai.** The company expanded in the region so it can work more closely with advertisers and partners in the UAE and Saudi Arabia.<sup>32</sup>
- The network's "Discover" service has been expanded to include content from regional providers like MBC (Middle East Broadcasting Center, a free-to-air satellite broadcasting company) and Al Arabiya (a Saudi-owned pan-Arab television news channel).<sup>33</sup>



Image: Snapchat Discover. Source: Al Arabiya

- Saudi Arabia lifted a ban on internet calls, which had restricted use of some functionality services like Snapchat, WhatsApp and Skype, on September 20th 2017. The ban, set by the Communications and Information Technology Commission, had stood since 2013.<sup>34</sup>
  - Elsewhere, in the region, relationships with these types of video calling services - which are often integrated into messenger and social media services - remains complicated.<sup>35</sup>



Image: Screenshot of tweet from Saudi telecoms regulator CITC.

- However, the network provoked some concerns<sup>36</sup> among a number of users with the introduction of their new location-sharing feature “Snap Map” feature. The feature launched globally in summer 2017.<sup>37</sup>

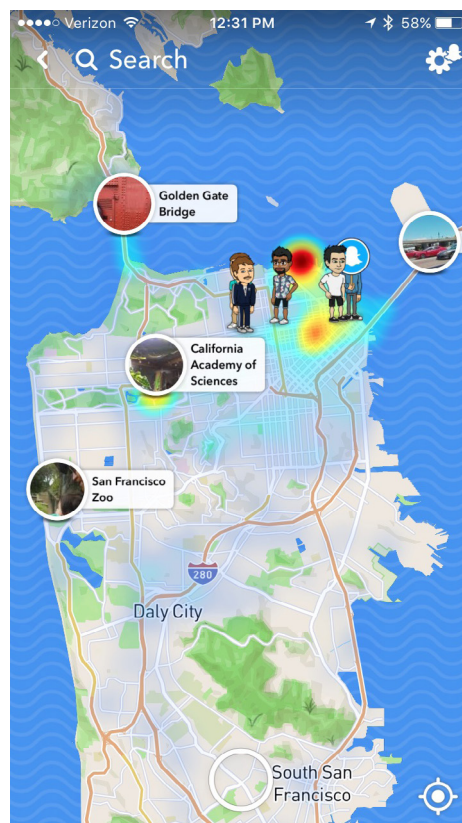


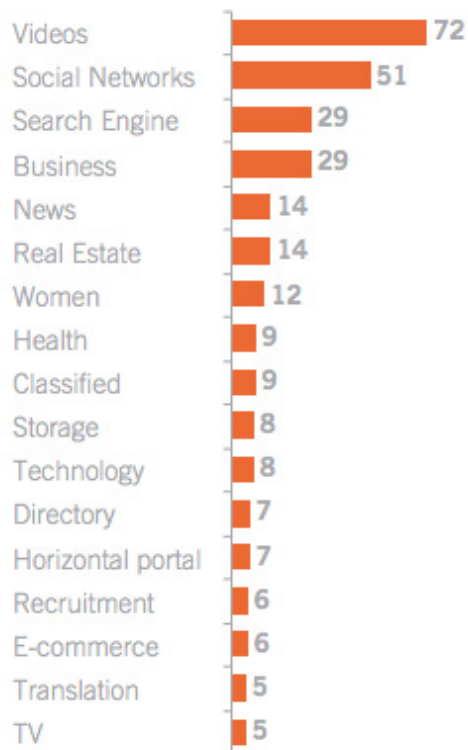
Image: Screenshot of Snap Map feature.



## 6. ONLINE VIDEO AND YOUTUBE USE REMAINS POPULAR

- **YouTube is viewed daily by half of young Arabs** (50%) according to the 16 nation Arab Youth Survey.<sup>38</sup>
- **The fastest growing video segment is “short-form (few minutes long), amateur digital content – curated by Arab youth and distributed on video platforms,”** notes the Dubai Press Club’s annual Arab Media Outlook.<sup>39</sup>
- Saudi Arabia is YouTube’s biggest market (globally) in per capita consumption,<sup>40</sup> their full 256 page study found, and video is the most popular online practice for young people, with the average 15-24 in MENA spending 72 minutes a day watching videos online. This behavior is much less common (averaging 16 mins a day) with those aged 35+.<sup>41</sup>

**Average daily time spent online 15-24**  
(MENA<sup>1</sup>, Minutes, 2015)



**Average daily time spent online 35+**  
(MENA<sup>1</sup>, Minutes, 2015)

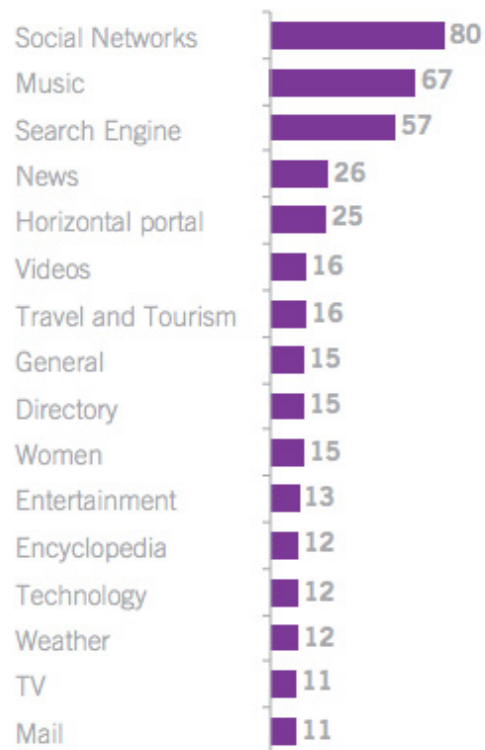


Image: Average daily time spent online. Source: Dubai Press Club, annual Arab Media Outlook.



- With young Saudis increasingly harnessing social media for entertainment, CNN notes that the nation has the highest YouTube watch time per capita of any country in the world, according to analytics agency Tubular Labs.
- Women in Saudi Arabia are using YouTube to express their views, CNN reports, citing data by Google. Since last year, the consumption of female-related content in the Kingdom increased by 75%.<sup>42</sup>
- Meanwhile, Khamsa Adwaa, a Saudi band made up of young girls, topped the most viewed list of the top trending music videos on YouTube in the Arab world for 2017, Google MENA found.<sup>43</sup>
  - Their song 'Hush,' amassed over 140 million views.
- All of 2017's most trending non-music videos come from the region's YouTube creators, Al Arabiya commented in an end of year video round-up.<sup>44</sup>

#### Top 10 trending music videos of 2017:

1. [Five Lights](#) - HUSH
2. [Saad Lamjarred](#) - LET GO
3. [Nasr Al Bahhar](#) - Ma Rad Ilay
4. [Aymane Serhani](#) - Nebghi Djini Bsurvet
5. [Cairokee & Tarek El Sheikh](#) - Al Keif
6. [Asma Lmnawar](#) - Andou Zine
7. [Abu & Yousra](#) - Talat Daqat
8. [Dyler](#) - Samooly
9. [Elissa](#) - Aaks Elli Shayfenha
10. [Tamer Hosny Team](#) - Allah Shahid



Image: Screenshot from HUSH video

#### Top 10 trending videos of 2017:

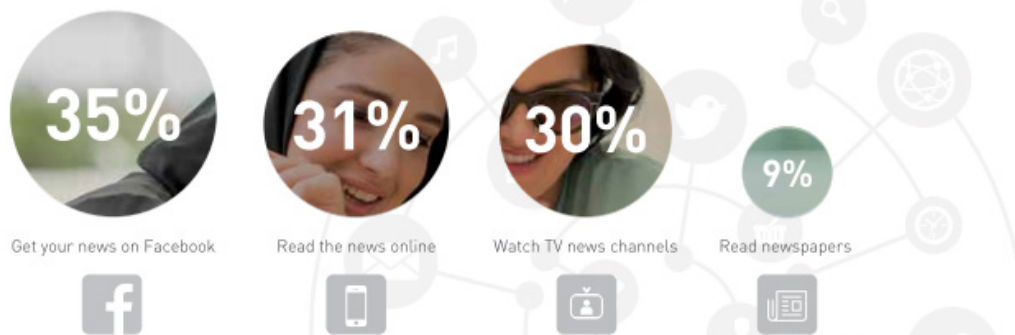
1. [Top Comedy Sketch Compilations](#) by Mmoshaya
2. [The iPad Generation](#) Episode by Swar Shuaib
3. [Ramadan Comedy Sketch](#) by Shady Srour
4. [Lie Detector Test Challenge with Danyah Shafei](#) by D7oomy
5. [Wedding Night Comedy Sketch](#) by Nour Stars
6. [Make Your Own Snow-Filled Pool Experience](#) by The Saudi Reporters
7. [Germany Travel Adventure](#) by Laila Mourad
8. [Fitness and Nutrition Tips](#) by SuperMama
9. [Beauty Review Segment Featuring a 24 Carat Gold Mask](#) by Esswara
10. [Automotive Adventure](#) by Ali Alhamoudi

## 6. SOCIAL NEWS CONSUMPTION THE NORM FOR ARAB YOUTH

- Social Networks are a popular means to keep abreast of the news, in the Middle East, as elsewhere,<sup>45</sup> although there are major differences across age groups and countries.
  - **Facebook is the most popular source for news among young Arabs.** The annual Arab Youth survey found 35% of respondents get news on Facebook each day, ahead of online sources (31%), TV news channels and newspapers (9%).<sup>46</sup>
  - Arab men and women aged 18 to 24 are also increasingly more likely to share news stories on Facebook. Although frequency wasn't identified, 64% of this cohort stated they'd shared stories on the social network, up from 41% just two years ago.

### MORE YOUNG ARABS SAY THEY GET THEIR NEWS DAILY ON FACEBOOK THAN TV NEWS CHANNELS, ONLINE SOURCES, OR PRINT

How often do you \_\_\_\_\_ ?  
(Showing Daily)



### How strongly do you agree or disagree with the statement?

I use Facebook to share interesting news articles I read.  
(Showing "Agree")



Image: Use of Facebook. Source: Arab Youth Survey, 2017

- Northwestern University in Qatar's "Media Use in the Middle East" survey, meanwhile, demonstrated **national variances in social news usage**. Overall, 40% of Arab Nationals in the six countries they studied said they got news from Facebook, ahead of WhatsApp (28%) and YouTube (28%).<sup>47</sup>
  - Notable national variances include Instagram leading the pack in Qatar (used by 47% of nationals) as a news source and WhatsApp's popularity for news (45%) in Saudi Arabia.

**Top three social media platforms for getting news in each country**  
% who use the following to get news

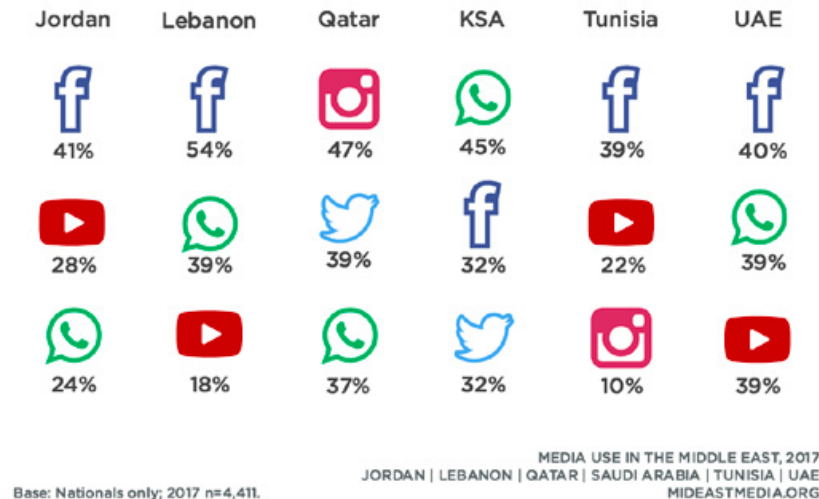


Image: Top social networks for news. Source: Northwestern University in Qatar

- Twitter, is the leading social network to get and share news,**<sup>48</sup> an activity 77% of MENA tweeps engage in. **However, with only 20% penetration,**<sup>49</sup> the network lags behind many others as a news platform used by the overall population.

**Top social media platforms to get/share news about current events**

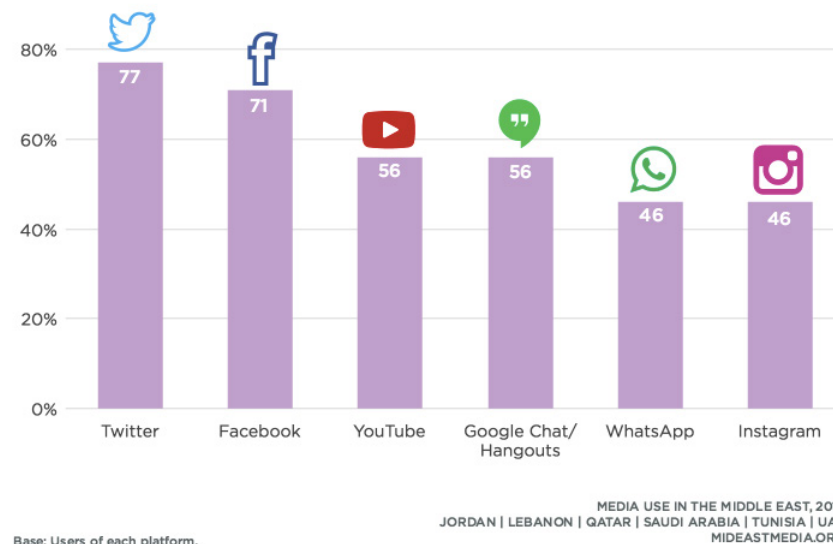


Image: Top social networks for news, based on users of each platform. Source: Northwestern University in Qatar.

## 8. CENSORSHIP, PRIVACY AND FREEDOM OF EXPRESSION

- On New Years Eve 2017, the Telegram app closed a channel used by protesters in Iran and run by exiled journalist, Roohallah Zam.<sup>50</sup> The government later restricted usage of the service, as well as Instagram<sup>51</sup> after the apps were used to organize anti-government protests and share videos from these demonstrations.
  - It is estimated that **40 million - out of a population of 80 million - use the Telegram app in Iran.**<sup>52</sup>
  - The BBC said: "In a tightly controlled media environment, much of the information about the demonstrations has emerged via social media, and platforms like Telegram and Instagram have been used extensively by protesters."<sup>53</sup>
  - Dr. Haroon Ullah, Chief Strategy Officer at the Broadcasting Board of Governors, observed that: "The more oppressive regimes are threatened by the freedom of information, they [sic] more they are liable to crack down."<sup>54</sup>
- A Lebanese NGO launched the Virtual Museum of Censorship in order to track banned and censored material (and why they were banned) in Lebanon since 1943. A searchable online database shows trends in censorship.
  - Gino Raidy, the vice president of MARCH, the nongovernmental organization (NGO) behind the museum, told Al-Monitor, "...we note that LGBT art and events are getting targeted more and more."<sup>55</sup>



Image: Screenshot of tweet from @JaredCohen, Founder & CEO of Jigsaw; Advisor to Executive Chairman of Alphabet.

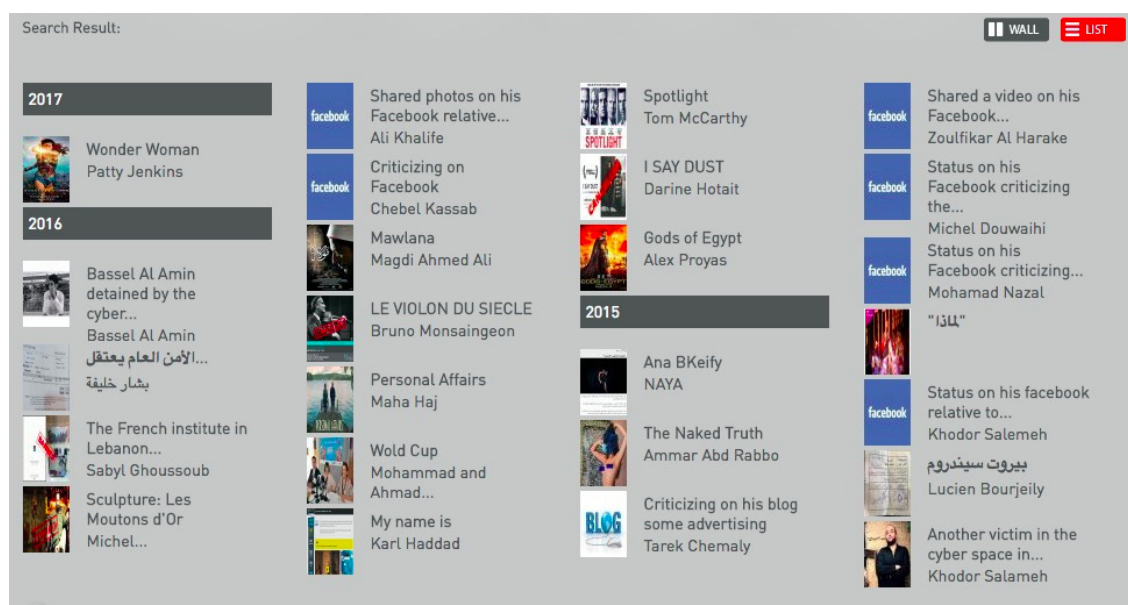


Image: Screenshot from <http://www.censorshiplebanon.org/Search> 25 January 2018



- A woman was arrested and then released after a Snapchat video showed her walking through an ancient fort in one of Saudi Arabia's most conservative provinces. In the video, she is wearing a skirt that is above her knees, a top that reveals her midriff, and her head is uncovered. On Twitter, users responded to the news and questioned Saudi Arabian laws and policies for women.<sup>56</sup>

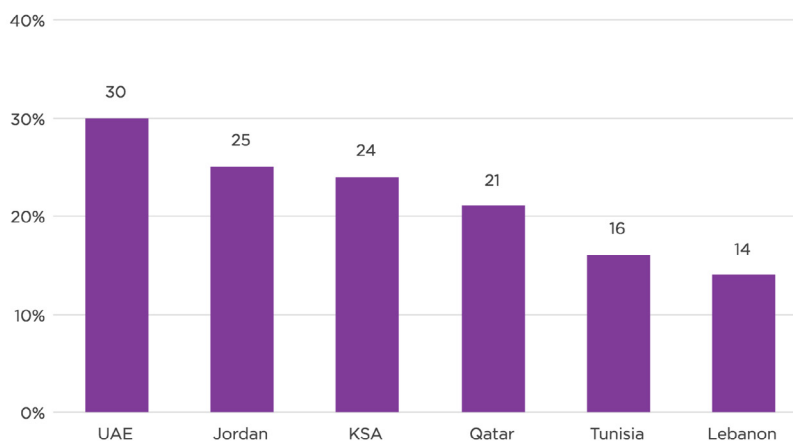


Image: Screenshots from Snapchat video of woman wearing a crop top and skirt in public.

- Data from Northwestern University in Qatar highlights how privacy concerns shape social media use in the region.<sup>57</sup> “Changes in social media behavior are rare across all nationals,” the report authors note.

“However, among the 23% who have made changes, the most common strategies include changing privacy settings (33%), posting less sensitive information (29%), posting less often (27%), and connecting with fewer people (24%).”

**% who say they changed their social media use due to privacy concerns**



Base: Nationals only; 2017 n=4,411.

MEDIA USE IN THE MIDDLE EAST, 2017  
JORDAN | LEBANON | QATAR | SAUDI ARABIA | TUNISIA | UAE  
MIDEASTMEDIA.ORG

Image: % who say they changed their social media use due to privacy concerns Source: Northwestern University in Qatar

## 9. CONFLICT BETWEEN SAUDI ARABIA AND QATAR UNFOLDS ON SOCIAL

In June, Saudi Arabia announced it had closed its border and cut diplomatic ties with Qatar, accusing its neighbour of supporting terrorism.<sup>58</sup> Qatar denied the claims, as a number of other MENA countries followed Saudi Arabia's diplomatic lead.<sup>59</sup> At the time of writing, the dispute<sup>60</sup> was ongoing.<sup>61</sup> Here's how elements of this situation played out on social media:

- In a statement, UAE Public Prosecutor Hamad al-Shamsi announced that **social media users in the UAE who “show sympathy” for Qatar could face three to 15 years in prison**, alongside a minimum fine of 500,000 dirhams (\$136,000).<sup>62</sup>
- **Snapchat blocked Al Jazeera’s “Discover” channel on their network, in Saudi Arabia.** Snapchat said that the move was in response to claims by the Saudi government that its content violated their cybercrime laws.<sup>63</sup>
- In response to the Saudi blockade, #DohaUnderSiege **saw some Qatar residents highlight that life seemed to be continued as normal.** Meanwhile, a stencil-style image of Qatar’s Emir, Sheikh Tamim bin Hamad al-Thani, can be readily seen on social media, cars,<sup>64</sup> murals and t-shirts<sup>65</sup> in the country.
- Outside of the region, President Trump tweeted on the subject,<sup>66</sup> whilst senior White House officials such as Secretary of Defense James Mattis<sup>67</sup> and Secretary of State Rex Tillerson<sup>68</sup> have both visited<sup>69</sup> Qatar, a long-standing US ally (as is Saudi Arabia).



Image: A Qatari takes a photo during the inaugural signing of a wall bearing a portrait of Qatar's Emir Sheikh Tamim bin Hamad al-Thani in Doha. Source: AFP

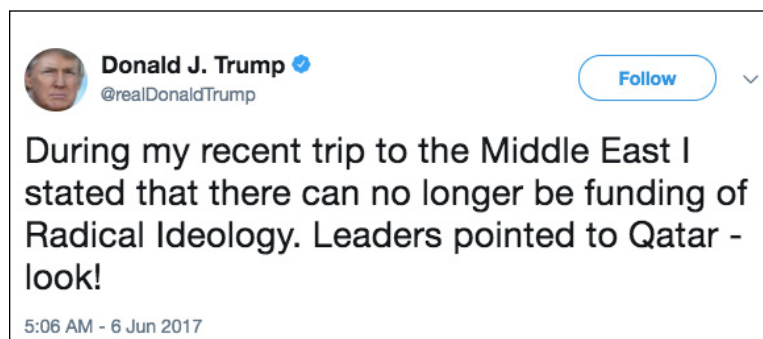


Image: Screenshot of tweet from @realDonaldTrump, President of the United States.

- Months before Saudi Arabia cut ties with Qatar, an “unknown entity” hacked the Qatar News Agency and published false statements on its website and Twitter account, local news website Doha News noted, also highlighting previous hacking of social media accounts in Qatar.<sup>70</sup>
- As WikiTribune recounted in a short explainer article: “The Washington Post reported in July that the United Arab Emirates hacked Qatar in May, which the Emirates have denied.”<sup>71</sup>
- Meanwhile, Quartz stated this “was nearly the first “fake news” war to transform into a physical conflict”<sup>72</sup> as the role of bots<sup>73</sup> and hacking were put under the microscope. The diplomatic implications of bots, automation,<sup>74</sup> as well as wider cybersecurity considerations, will only grow in importance to diplomats and nations around the world.

# 10. THE IMPACT AND ROLE OF SOCIAL INFLUENCERS

- Huda Kattan, an Iraqi American makeup artists and Dubai-based business woman, was determined to be the world's highest paid social influencer in the first ever Instagram Rich List. She boasts 20.5 million followers and charges \$18,000 per post.<sup>75</sup>

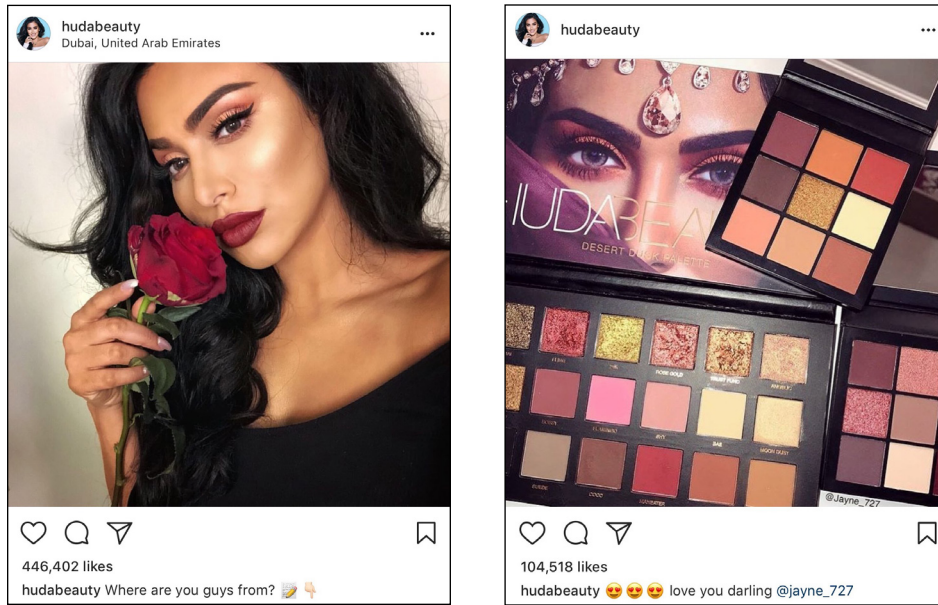


Image: Screenshots from @hudabeauty Instagram feed.

- According to a survey of 100 in-house marketing and communication experts and brand managers, conducted by BPG Cohn & Wolfe in the UAE, around 43% of marketers spend up to \$10,000 per social media influencer campaign.<sup>76</sup>
  - Half of those polled currently work with social media influencers in the region.
  - 94% of in-house marketers in the UAE believe social media influencer marketing plays a major role in the success of their brands.
  - 55% said their biggest challenge when picking influencers was finding relevant ones that relate to the brands.

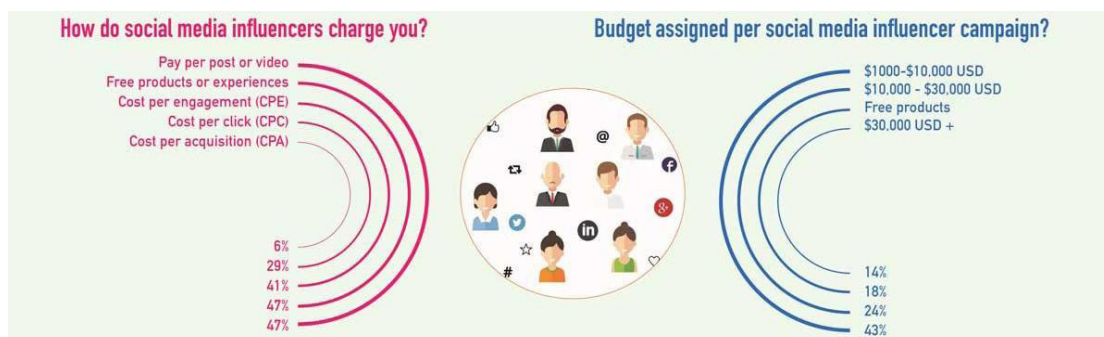


Image: Section from BPG Cohn & Wolfe Influencer Marketing Survey with YouGov.

- At the ITP Live Conference, in November 2017, **some experts argued that social influencers in the UAE should be regulated** and operate within a legal framework.<sup>77</sup>
  - At the same conference, Sir Martin Sorrell, chief executive of advertising giant WPP, argued that although “[social media influencers] have become important,” they were not reshaping the media landscape, arguing they are “a variant of traditional celebrity endorsement and word of mouth... [which] has become, in a way, even more important”.
  - Sorrell suggested micro-influencers, those with 10,000 followers or less, are becoming the more dominant players.<sup>78</sup>
- One of the Middle East’s most popular social media personalities is Mohammed al-Arefe, a religious leader based in Saudi Arabia with more than 19 million social media followers.<sup>79</sup>
- Despite the rise in influencer marketing, three-quarters (74%) of Middle-Eastern women say traditional media remains their main source of information on products or brands.
  - However, this figure is reversed in Kuwait where 54% cite online sources as more important.
  - Younger women also have a different perspective. According to Ipsos MENA, 47% of 18-24 year olds says online platforms are their main source of information on products or brands.<sup>80</sup>

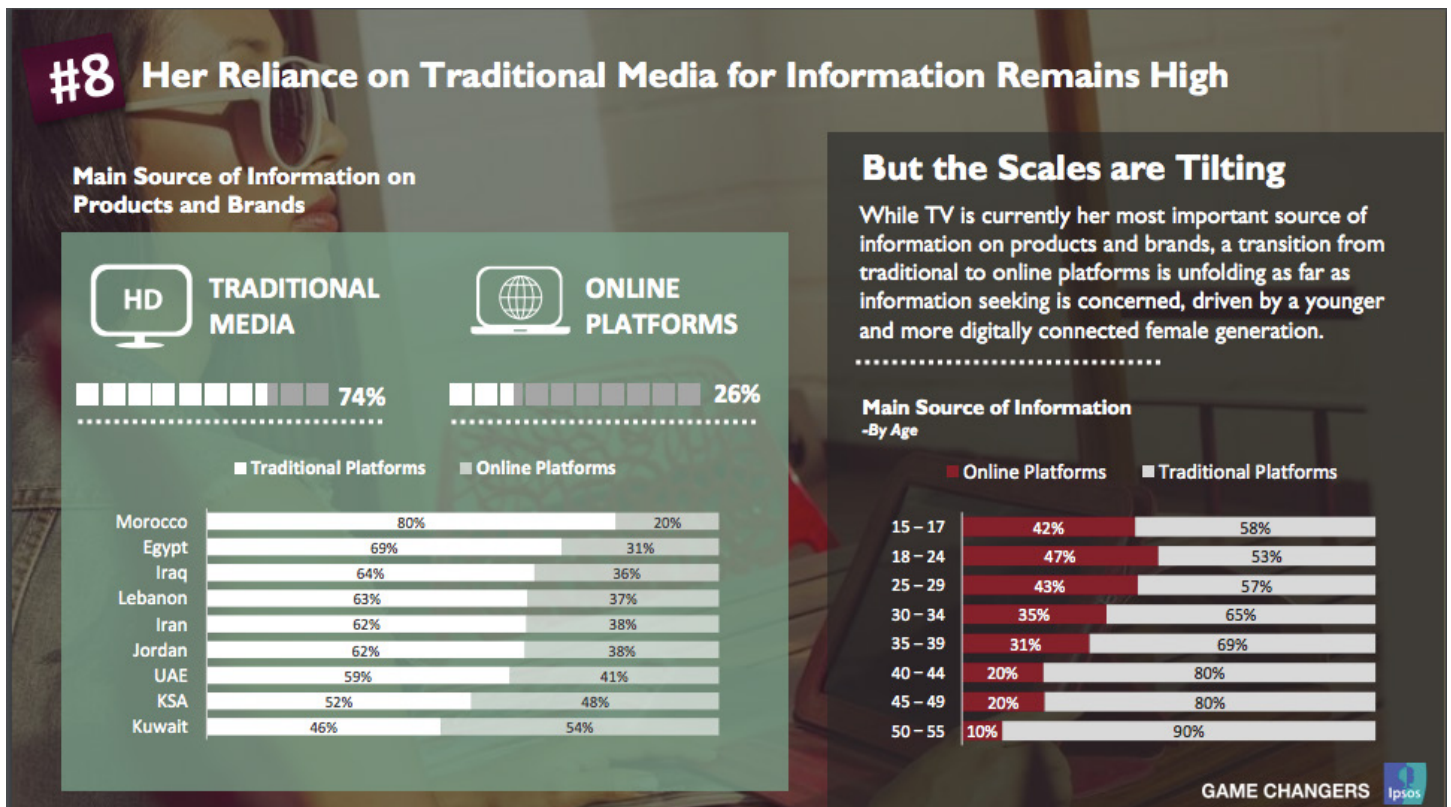


Image: Sources of Information, "She Speaks" research. Source: Ipsos MENA - October 2016



# LOOKING AHEAD: THREE TRENDS TO WATCH

## 1. Trust in Social Media versus Other Media

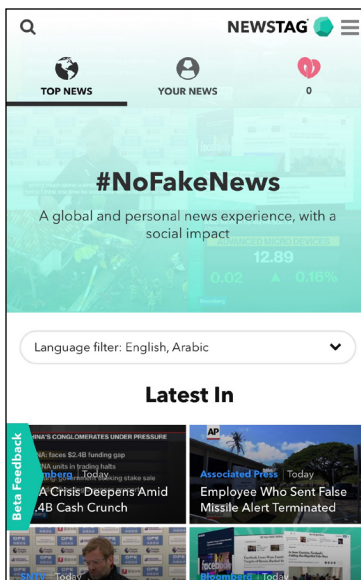
- In an era of “Fake News” it’s notable that data from Northwestern University in Qatar suggests **trust in mass media across the MENA region is high**. Overall, Arab nationals are twice as likely as Americans to trust mass media.
- “In a 2016 Gallup poll, just 32% of Americans said they trust the mass media compared with two-thirds or more in Jordan, Lebanon, Qatar, Saudi Arabia, and the UAE, and 58% in Tunisia,” the authors wrote.<sup>81</sup>
- However, trust in news from social media is lower across MENA. Just 47%, according to NU-Q’s data, say they trust news on social media a “great deal/fair amount” dropping to 32% who determined that their trust in social news as “not very much/no trust at all”<sup>82</sup> at 47%.

## 2. The growth - and power - of messaging platforms

- These platforms have been on the rise for some time, across the globe.<sup>83</sup>
- **Group and direct messaging functions are harnessed by users in MENA to chat with friends, family and coworkers on a variety of different topics** including issues related to the news, religion and more personal (e.g. family) conversations.<sup>84</sup>
- In a region where state media and access to information can sometimes be challenging, Dr Harron Ullah - a former senior adviser to three US Secretaries of State, and senior fellow at Harvard University’s Belfer Center - describes encrypted messaging apps [in this case in Iran, but applicable to countries around the world] as:

“...the new front lines, giving protestors the ability to punch above their weight on the digital battlefield... citizens now have independent news sources to turn to for facts and reliable information, as opposed to government disinformation.”<sup>85</sup>

## 3. Tapping into MENA’s love of video



- The **mobile-first video platform, Newstag, announced that it would launch a video news service for MENA earlier this year. The mobile app allows users to create and watch personalized video news.**<sup>86</sup>
  - Currently 60% of its existing users are based in the MENA region.<sup>87</sup>
  - With other news, entertainment and information providers - originating from both within and outside of the region - also looking to expand their reach among MENA’s digitally savvy population, video may well be at the forefront of these strategies.

*It will be interesting to see how these trends and others evolve in 2018.*

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