



Arab Social Media Report



كلية دبي للإدارة الحكومية
DUBAI SCHOOL OF GOVERNMENT

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The Arab Social Media Report (ASMR), produced by the Dubai School of Government's Governance and Innovation Program, is the first in a quarterly series that will highlight and analyze usage trends of online social networking across the Arab region. In its inaugural edition, the report analyzes data on Facebook users in all 22 Arab countries, in addition to Iran and Israel. This is part of a larger research initiative focusing on social engagement through ICT for better policy in Arab states, which explores the use of social networking services in governance, entrepreneurship promotion and social inclusion. The initiative also studies the potential of Web 2.0 applications for increasing collaboration, knowledge sharing and innovation, both between and among government entities, citizens and the private sector.

Toward this end, the Arab Social Media Report will aim to inform a better understanding of the impact of social media on development and growth in the Arab region by exploring the following:

- 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 networking dynamics on innovation and entrepreneurship?

This report, along with updated information, charts and links to social networking ASMR group pages are available at:
www.ArabSocialMediaReport.com.

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Facebook Usage: Factors and Analysis

1. Introduction

The rapid rise of social media, driven by the past decade's Internet boom¹, has brought with it promises of more participatory governance, civic engagement, new social dynamics, a more inclusive civil society and a wealth of opportunity for businesspersons and entrepreneurs. Today, social media tools have become a staple in the everyday lives of many people, merging their online and offline experience, and becoming one of the main methods of social connection and interaction around the world, whether between individuals, or with businesses and governments. Facebook is arguably one of the most popular social networking sites in the world, as highlighted by Figure 1, in which a social map visualizing the Facebook interconnectivity of "netizens" around the globe has resulted in a highly detailed new outline of the world. As such, this inaugural report focuses on Facebook usage as the primary metric of social media usage. Future editions of the report will expand coverage to other social networking platforms such as Twitter and LinkedIn.

The past year has seen social media being used in a wide variety of ways in the Arab region, whether to rally people around social causes and political campaigns, boost citizen journalism and civic participation, create a forum for debate and interaction between governments and their communities, or to enhance innovation and collaboration within government. These tools have also been viewed negatively and subverted, censored and exploited (Figure 2). It is repeatedly argued that this social media "revolution" is also contributing to economic growth globally. Social networking businesses are quickly climbing up the most successful companies list.² Additionally, such platforms and their "networks," which connect more than 550 million people globally, provide an infrastructure for thousands of start-ups, social entrepreneurs and to explore their creative potential and build diverse businesses and services for a steadily growing audience.³

¹ With around 30 percent of the world population embracing the Internet and a growth rate close to 450 percent over that period.

<http://www.un.org/apps/news/story.asp?NewsID=36492&Cr=internet&Cr1=>
<http://www.internetworldstats.com/stats.htm>

² For example, Facebook alone is estimated to be a \$50 billion dollar company, while Twitter is worth an estimated \$3.7 billion.

http://www.economist.com/economist-asks/facebook_overvalued_50_billion?fsrc=scn/fb/wl/ar/asks_facebookvalue,
<http://online.wsj.com/article/SB10001424052748704828104576021954210929460.html>

³ For example, according to Facebook's official statistics page to date more than 2.5 million individuals have created applications developed via the Facebook platform alone, creating thousands of jobs and massive growth potential.



Social networking tools have the potential to enhance citizen engagement in the region, promote social inclusion and create opportunities for employment, entrepreneurship and development.



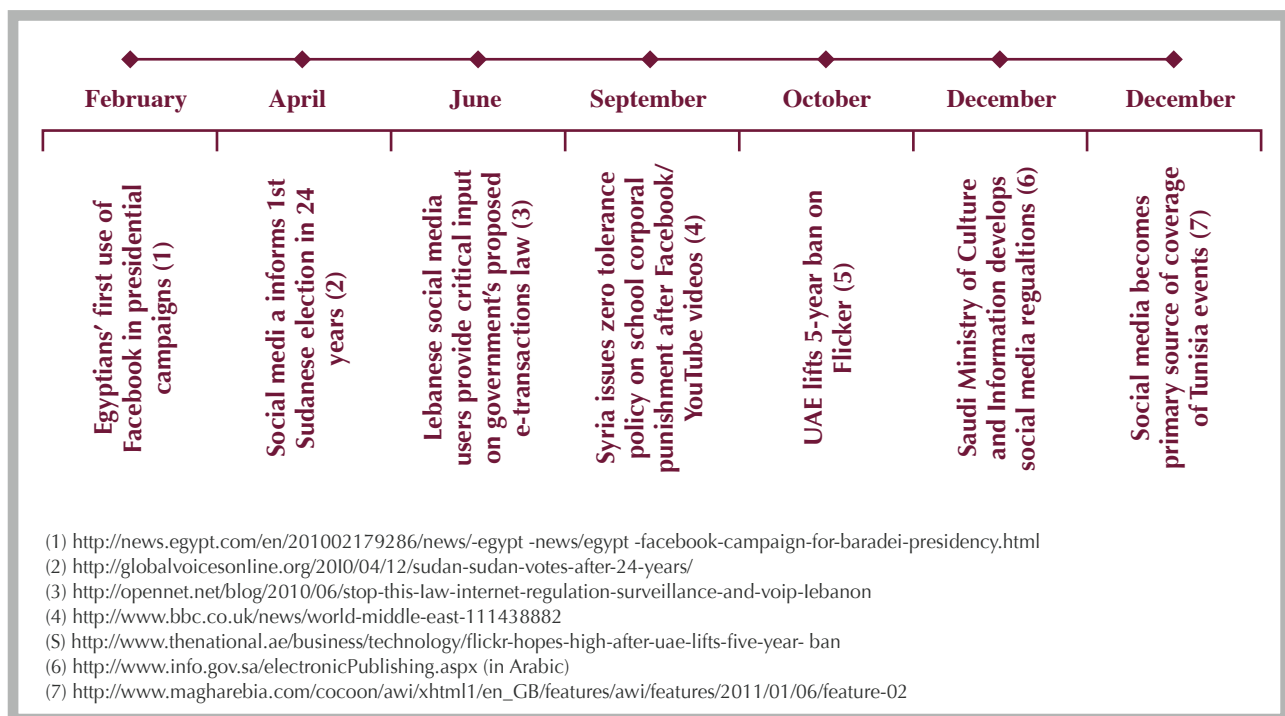
Figure 1: A Visualization of Facebook Network Connections



Source: Facebook.com

According to research conducted by DSG’s Governance and Innovation program, the penetration of social networking and Web 2.0 technologies is soaring in the Arab region. Demographically, the Arab region is a youthful one, where youth between the ages of 15 and 29 make up around one-third of the population. With the exponential growth of online social networking—particularly among this demographic, who will in the next few years become active citizens, potential entrepreneurs and part of the government and private sector workforce—it is argued that social networking tools have the potential to enhance citizen engagement in the region, promote social inclusion and create opportunities for employment, entrepreneurship and development.

Figure 2: Selected Highlights of Social Media Usage in the Arab Region 2010

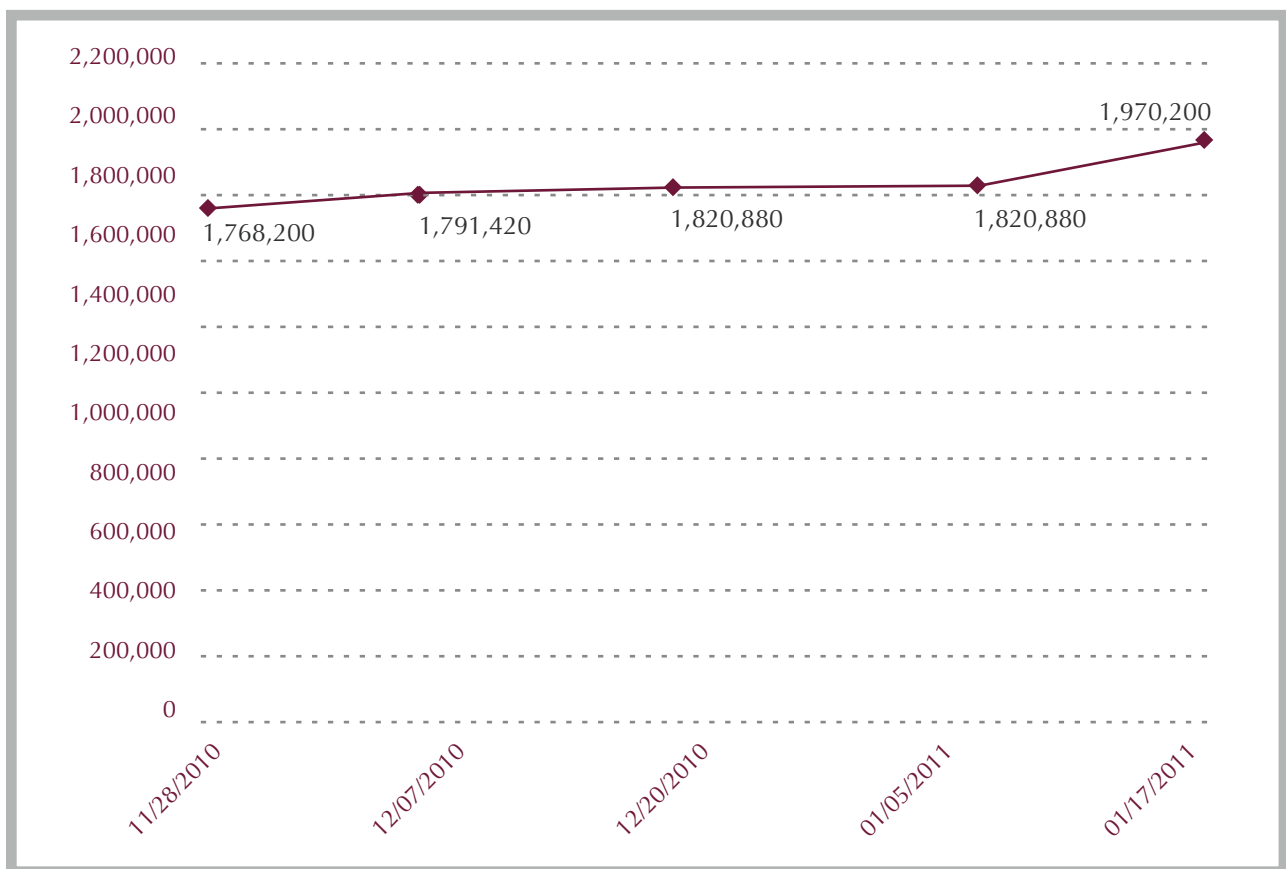


Social media or social networking tools are Internet-based applications that focus on building social networks or social relations among people with shared interests and/or activities. Social media sites essentially consist of a representation of each user (often a profile), his/her social links, and a variety of additional services. They allow users to share ideas, activities, events, and interests within their individual networks, in addition to a wider scope of applications with increasing global impact on society and government.

On the regulatory side, some Arab countries are currently developing guidelines on the use of social media, whether by citizens or governments. Saudi Arabia, for example, has recently issued a document outlining the laws and rules governing the licensing and use of social networking tools and other forms of online publishing by citizens.⁴ Conversely, the UAE is in the process of finalizing guidelines on social media usage by government entities. This document, developed by the General Information Authority and the Dubai School of Government, highlights best practices and addresses both the benefits and risks of using social networking tools, both in engaging with citizens and for inter-agency collaboration.

The civil movements in Tunisia and Egypt during December 2010 and January 2011 are a prime example of the growth and shift in social media usage by citizens. The proportion of Tunisian citizens connected through Facebook, for example, (Facebook penetration) increased by 8% during the first two weeks of January 2011. The type of usage also changed markedly, shifting from being merely social in nature to becoming primarily political (Figure 3).⁵

Figure 3: Number of Facebook users in Tunisia (End-Nov. 2010 to mid-Jan. 2011)



⁴ <http://www.info.gov.sa/electronicPublishing.aspx>

⁵ The change to numbers of Egyptian Facebook users during January 2011 was not yet available for this edition of the report.

“On a global level, the UAE is the top Arab country in terms of Facebook penetration as percentage of the population. It is also among the top 10 in the world, with a Facebook penetration rate of 45%”

2. Mapping Facebook Usage in the Arab World

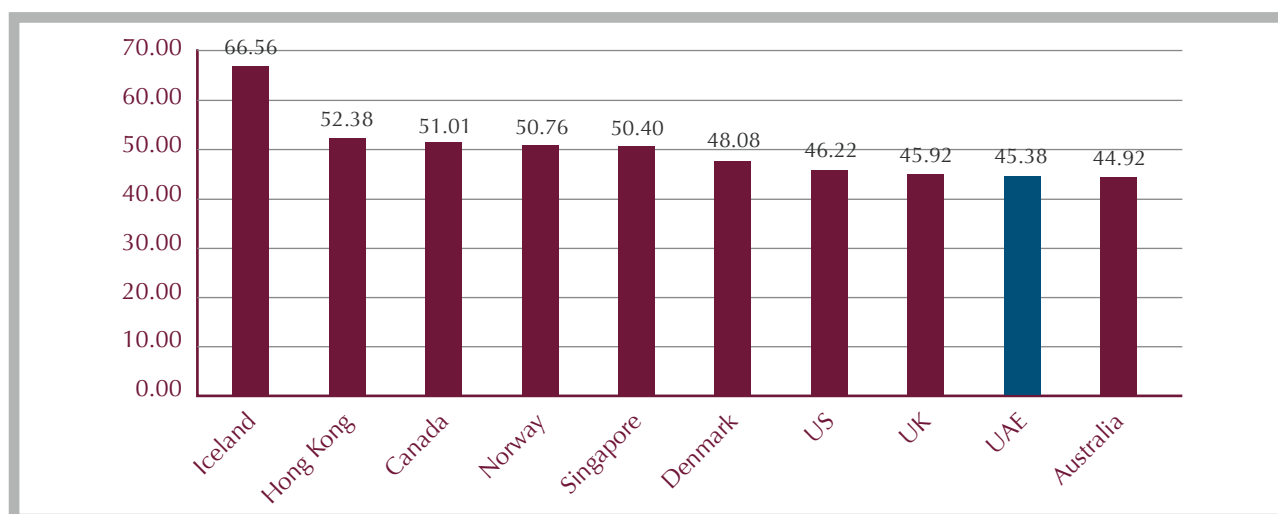
This edition of the Arab Social Media Report focuses primarily on Facebook usage in the Arab region. As such, the number of Facebook users in all 22 Arab countries, in addition to Iran and Israel, was collected periodically between April and December 2010, in the following age brackets—youth (15-29), and adults (30 and over)—as well as by gender, and correlated with several factors, including digital access, gender gaps, youth population, and Internet freedom. Below are the findings:

2.1 Penetration and uptake⁶ Facebook in the Arab World: A Snapshot

- The total number of Facebook users in the Arab world stands at 21,361,863 (Dec. 2010), up from 11,978,300 (Jan. 2010). A 78% annual growth rate.
- At the end of 2010, the country average for Facebook user penetration in the Arab region was 6.77%.
- The UAE has the highest penetration rate in the Arab region, with more than 45% of the population having Facebook accounts.
- GCC countries dominate the top five Arab FB users as percentage of population, with Lebanon being the only exception.
- With around 4.7 million Facebook users, Egypt constitutes about 22% of total users in the Arab region.
- Youth (between the ages of 15 and 29) make up 75% of Facebook users in the Arab region.
- Gender breakdown of Facebook users indicates an average 2:1 ratio of male to female users in the Arab region, compared to almost 1:1 globally.

On a global level, the UAE is the top Arab country in terms of Facebook penetration as percentage of the population. It is also among the top 10 in the world, with a Facebook penetration rate of 45% (Figure 4). Penetration is calculated by dividing the number of Facebook users by country population (based on ILO statistics). However, official population numbers have been recently obtained for GCC countries. The variation in Facebook penetration according to these figures is highlighted in the figures and tables below.

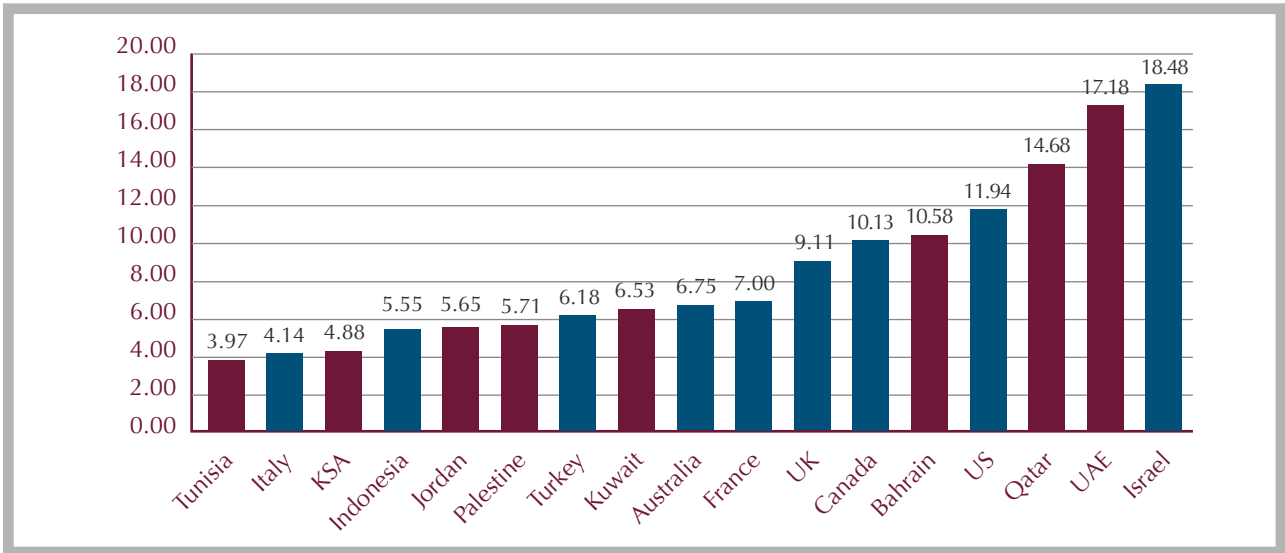
Figure 4: Top 10 Countries by Facebook Penetration (Dec. 2010)



⁶ For all charts in the report, the numbers of Facebook users in Syria, Sudan and Iran are estimates, while the numbers for remaining countries were compiled from official Facebook data. Refer to the Annex for details.

Moreover, when comparing the uptake of Facebook in Arab countries with that in some of the “Top 20” countries (in terms of Facebook penetration worldwide), several Arab countries outpace the Top 20 in terms of new users acquired throughout 2010 as percentage of population. By the end of 2010, the UAE and Qatar, for example, had acquired 17.2% and 14.7% new users respectively as a percentage of their country populations (while in Israel, Facebook acquired 18.4%), compared with the US (11.9%) and Canada (10.15%), for example, two other countries with among the highest Facebook penetration rates in the world (Figure 5).

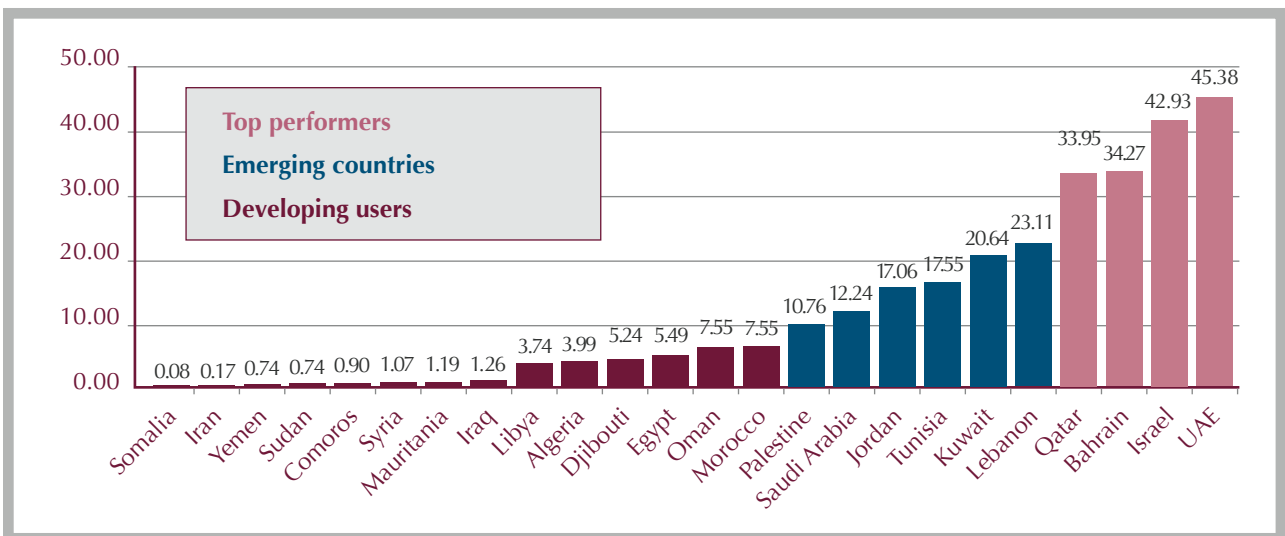
Figure 5: New Facebook Users in 2010 as Percentage of Population



“ When comparing the uptake of Facebook in Arab countries with that in some of the “Top 20” countries (in terms of Facebook penetration worldwide), several Arab countries outpace the Top 20 in terms of new users acquired throughout 2010 ”

On a regional level⁷, the Arab countries can be divided into three groups according to their rates of Facebook penetration (Figure 6).

Figure 6: Facebook User Penetration in the Arab Region plus Iran and Israel (Dec. 2010)



⁷ Israel and Iran are also included for comparative purposes in this report, as Middle Eastern countries that share certain socioeconomic and geopolitical characteristics with many Arab countries.

- 1. Top performers:** These countries' Facebook user penetration rates are on par with the Top 20 countries in the world, indicating a pervasive use of Facebook in their societies. (Facebook penetration ranging from 30%-45%)
- 2. Emerging countries:** These countries' Facebook user penetration ranges from 10%-25%, indicating a medium penetration of Facebook users.
- 3. Developing users:** These countries have low rates of Facebook user penetration, ranging from less than 1% to just under 8%, indicating room for growth.

Table 1 and Figure 7 also highlight the numbers of Facebook users and their penetration both as a percentage of country population and as percentage of total Facebook users in the Arab world.

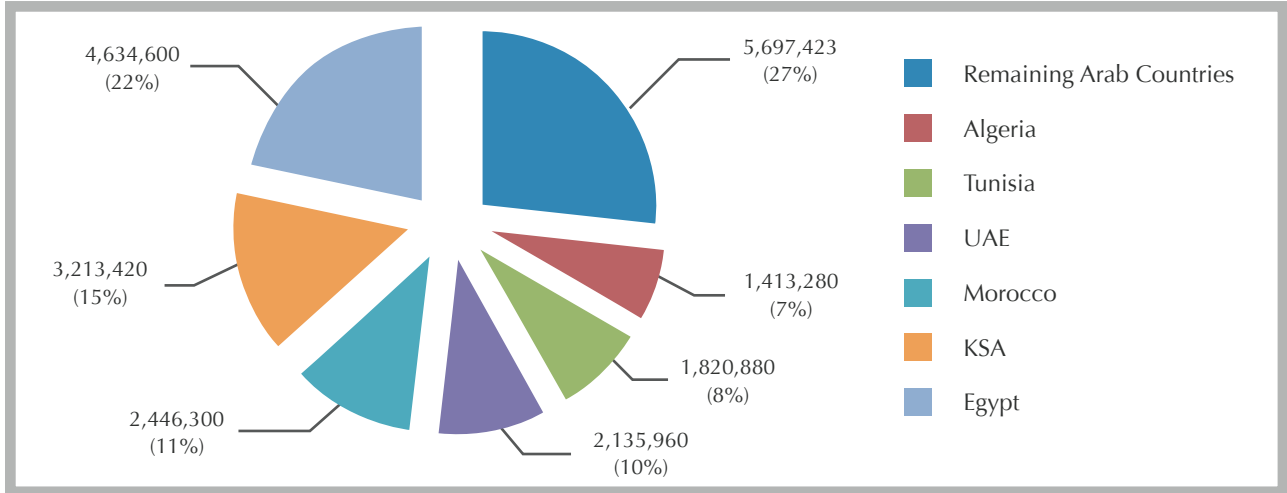
Table 1: Facebook Users and Country Population in the Arab World

Country	Number of Facebook users	Population*	Facebook penetration (%)
Algeria	1,413,280	35,422,589	3.99
Bahrain	276,580	807,131	34.27
Comoros	6,240	691,351	0.90
Djibouti	46,040	879,053	5.24
Egypt	4,634,600	84,474,427	5.49
Iraq	397,140	31,466,698	1.26
Jordan	1,104,340	6,472,392	17.06
Kuwait	629,700	3,050,744	20.64
Lebanon	983,380	4,254,583	23.11
Libya	260,400	6,545,619	3.98
Mauritania	40,000	3,365,675	1.19
Morocco	2,446,300	32,381,283	7.55
Oman	219,320	2,905,114	7.55
Palestine	474,400	4,409,392	10.76
Qatar	512,060	1,508,322	33.95
Saudi Arabia	3,213,420	26,245,969	12.24
Somalia	6,940	9,133,124	0.08
Sudan	319,624	43,192,438	0.74
Syria	241,859	22,505,091	1.07
Tunisia	1,820,880	10,373,957	17.55
UAE	2,135,960	4,707,307	45.38
Yemen	179,400	24,255,928	0.74

the UAE is the most balanced in terms of adult and youthful Facebook users, while countries such as Somalia, Palestine and Morocco have a predominantly youthful Facebook user population

The demographic breakdown of Facebook users indicates that they are a youthful group. Youth (between the ages of 15 and 29) make up 75% of Facebook users in the Arab region.

Figure 7: Number of Facebook Users and Percentage of Users in the Arab Region

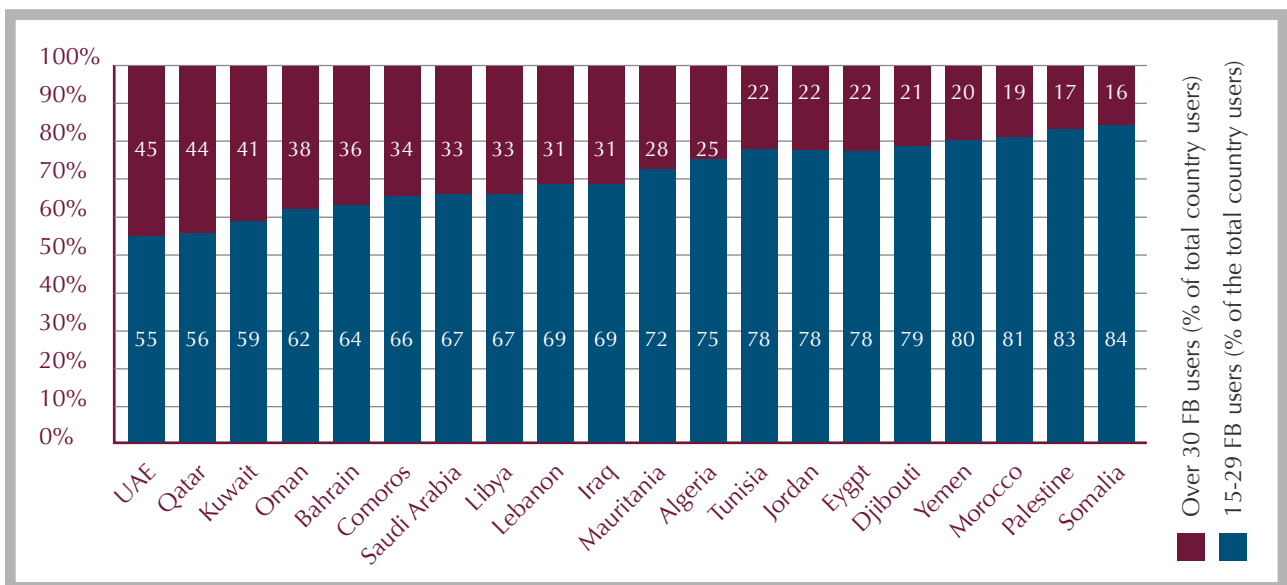


To ensure consistent comparisons, the populations for the Arab world used in this report were compiled from the United Nations ILO Department of Statistics. All of the figures in international reports conflict with more recent official GCC population numbers. Replacing some of the population figures with more recent figures from National Statistics Offices (specifically for the GCC countries) drastically changes the Facebook penetration rates and rankings within the GCC (for further details refer to Annex 2).

2.2 Demographic and gender breakdown of Facebook penetration

The **demographic breakdown** of Facebook users indicates that they are a youthful group. Youth (between the ages of 15 and 29) make up 75% of Facebook users in the Arab region. Moreover, the UAE is the most balanced in terms of adult and youthful Facebook users, while countries such as Somalia, Palestine and Morocco have a predominantly youthful Facebook user population (see Figure 8 below).

Figure 8: Demographic Breakdown of Facebook Users in the Arab Region* (Dec. 2010)



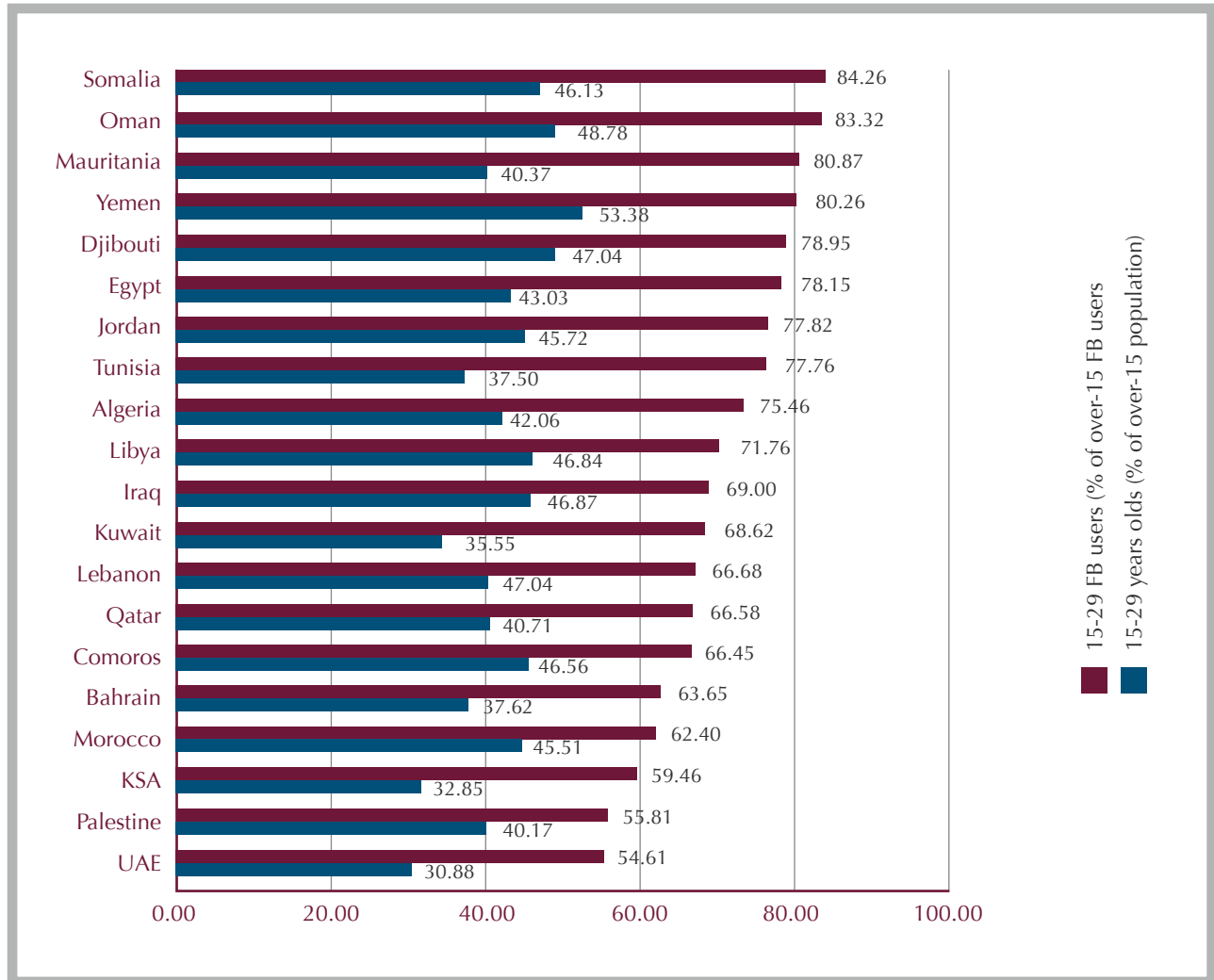
* Excluding Syria and Sudan (due to US technology sanctions, no data on demographic breakdown of Facebook users available)

8 <http://laborsta.ilo.org/>

9 Arab ICT Use Report 2010, Madar Research, Dubai, UAE

Moreover, the percentage of Arab Facebook users who are between 15 and 29 years of age is significantly higher than the proportion of youth (15-29) in general in the Arab world (roughly 40% of 15 year-olds and above). See Figure 9, indicating the high uptake of Facebook among Arab youth.

Figure 9: Comparison of Overall Youth Population to Young Facebook Users in Arab Countries*

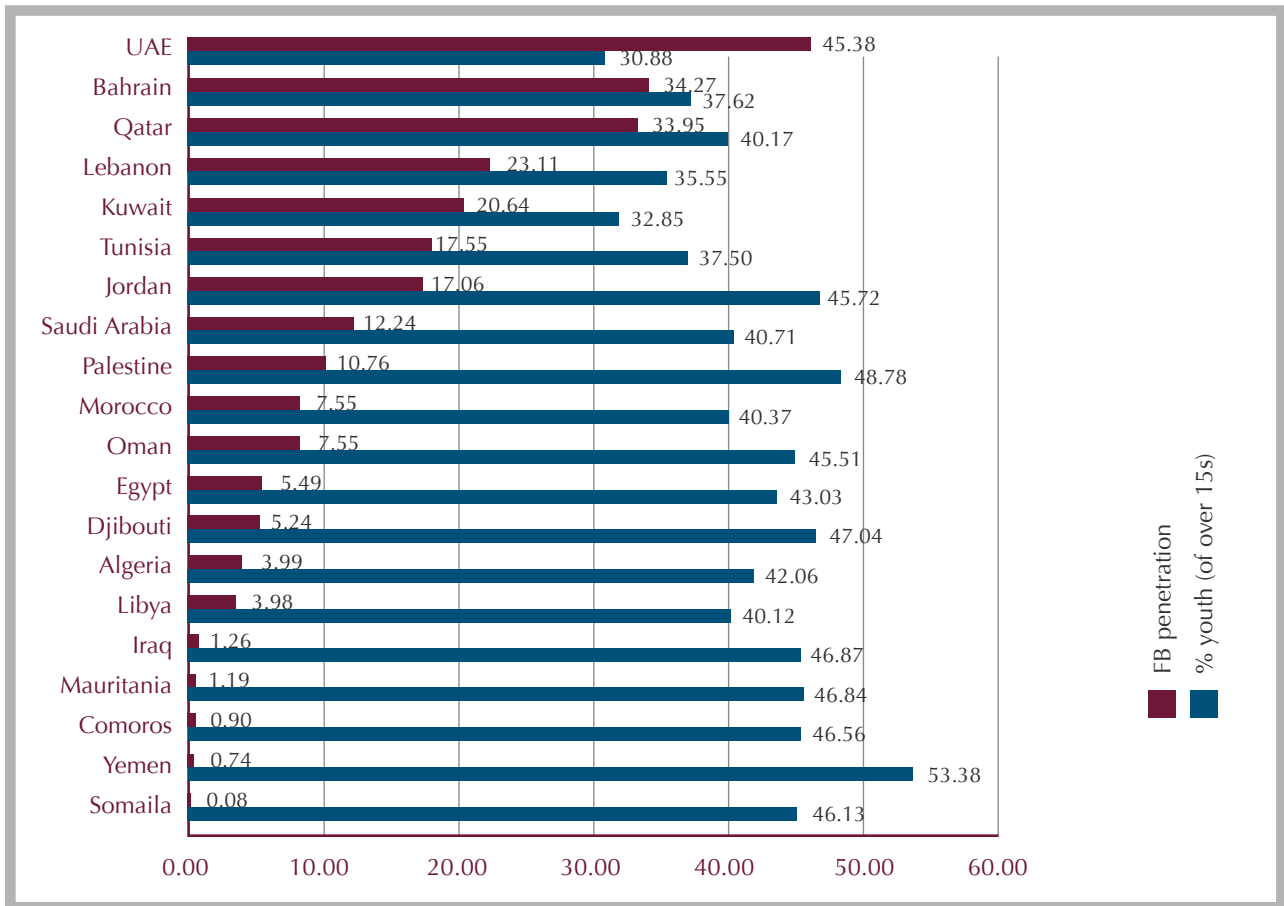


* Excluding Syria and Sudan (due to US technology sanctions, no data on demographic breakdown of Facebook users available)

Although the Arab region in general is a youthful one, the size of the youth population does not necessarily correlate with Facebook penetration rates. However, it does seem to indicate potential for growth (see Figure 10).

“ The gender breakdown of Facebook users indicates an average 2:1 ratio of male to female users in the Arab region. This goes against the global trend of Facebook usage, where women constitute a small majority of users, with 54% of Facebook users ”

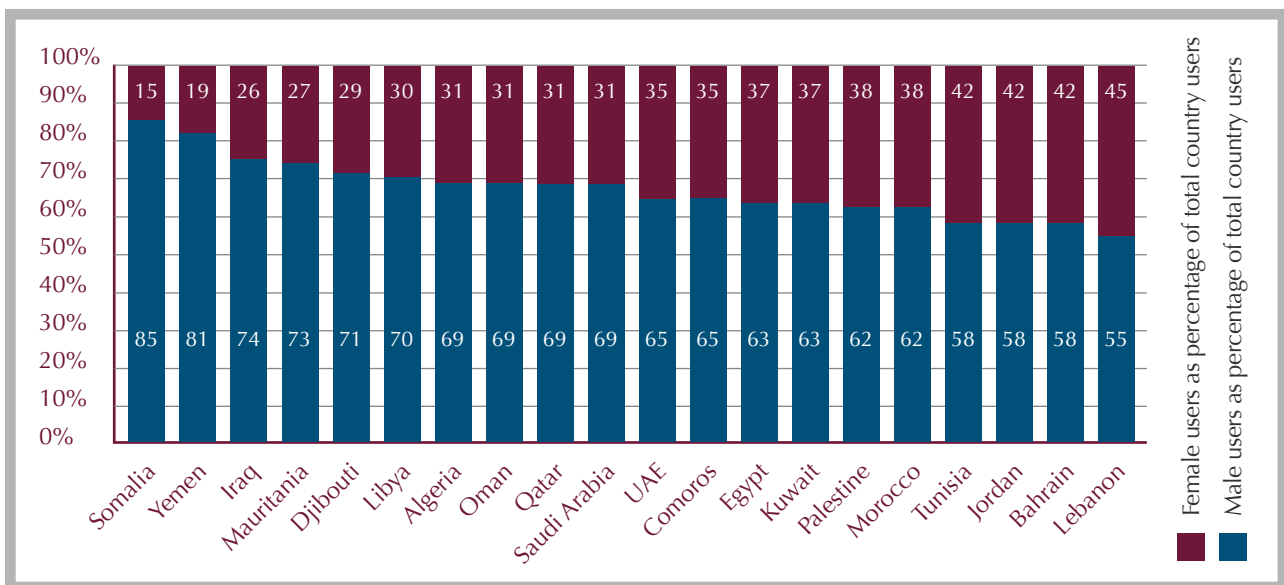
Figure 10: Comparison of Overall Youth Population to Facebook Penetration Rates in Arab Countries*



* Excluding Syria and Sudan (no data on demographic breakdown of Facebook users available)

The **gender breakdown** of Facebook users indicates an average 2:1 ratio of male to female users in the Arab region. This goes against the global trend of Facebook usage, where women constitute a small majority of users, with 54% of Facebook users¹⁰ (see Figure 11).

Figure 11: Gender Breakdown of Facebook Users in Arab Countries* (Dec. 2010)



* Excluding Syria and Sudan (due to US technology sanctions, no data on gender breakdown of Facebook users available)

¹⁰ <http://www.digitaltrends.com/computing/infographic-facebook-vs-twitter-2010-user-stats/?news=123>

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

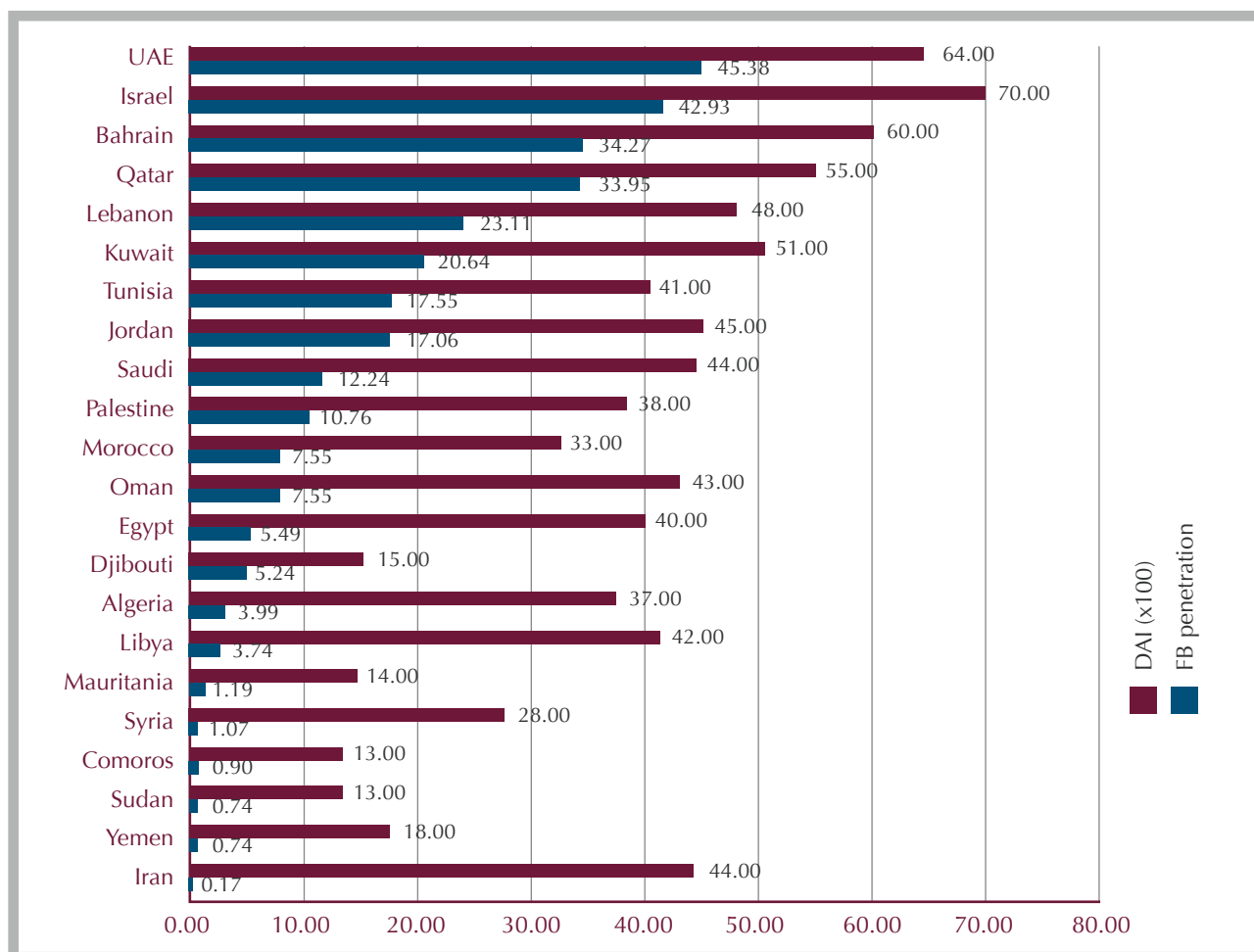
In terms of Facebook usage, Lebanon is the most gender-balanced of the Arab countries, followed closely by Bahrain, Jordan and Tunisia, while at the other end of the spectrum Facebook users in Somalia and Yemen are overwhelmingly male

3. International Benchmarks and Facebook Usage Trends in the Arab States

Countries in the Arab world share a number of similar characteristics, such as a booming youth population, but they also diverge along several lines. Given the diversity of Facebook penetration rates across the Arab region, we explored various indicators to assess which trends and factors seem to affect its use and uptake. The comparison included the following indicators:

- Digital Access Index (DAI)
- Internet penetration
- Income (FDP per capita)
- Internet freedom
- Other development indicators:
 - Global Gender Gap Index
 - Human Development Index (HDI)

Figure 12: Facebook Penetration and Digital Access Index in the Arab Countries* (plus Iran and Israel) (Dec. 2010)



* Excluding Iraq and Somalia; no data on DAI was provided.

3.1 Digital Access Index¹¹ (DAI): Developed by the International Telecommunications Union (ITU), the Digital Access Index (DAI) is a composite of several factors and measures representing the overall ability of individuals in a country to access and use new ICTs (on a scale from 0-1)¹². Within the DIA, countries are grouped into High, Upper, Medium and Low brackets. A correlation exists with Facebook penetration for countries with high DAI, but less so for countries with medium DAI, indicating that the other factors measured by the listed indicators above come into play and affect these countries' Facebook penetration rates (see Figure 12).

By comparing the Arab countries to their "peers" within each of the DAI brackets, we can see how they are performing in terms of Facebook penetration when compared to some of the top 20 countries in the world. Clearly, the UAE, Qatar, Bahrain and Kuwait perform as well as their counterparts in the Upper DIA bracket (Figure 13), while Lebanon, Tunisia and Jordan also hold their own in the Medium DIA bracket (Figure 14). For the remaining Arab countries in the Middle DIA bracket, other factors (explored further in this paper) seem to come into play.

Figure 13: Comparison of Facebook Penetration Rates Among Select Upper DAI Countries (Dec. 2010)

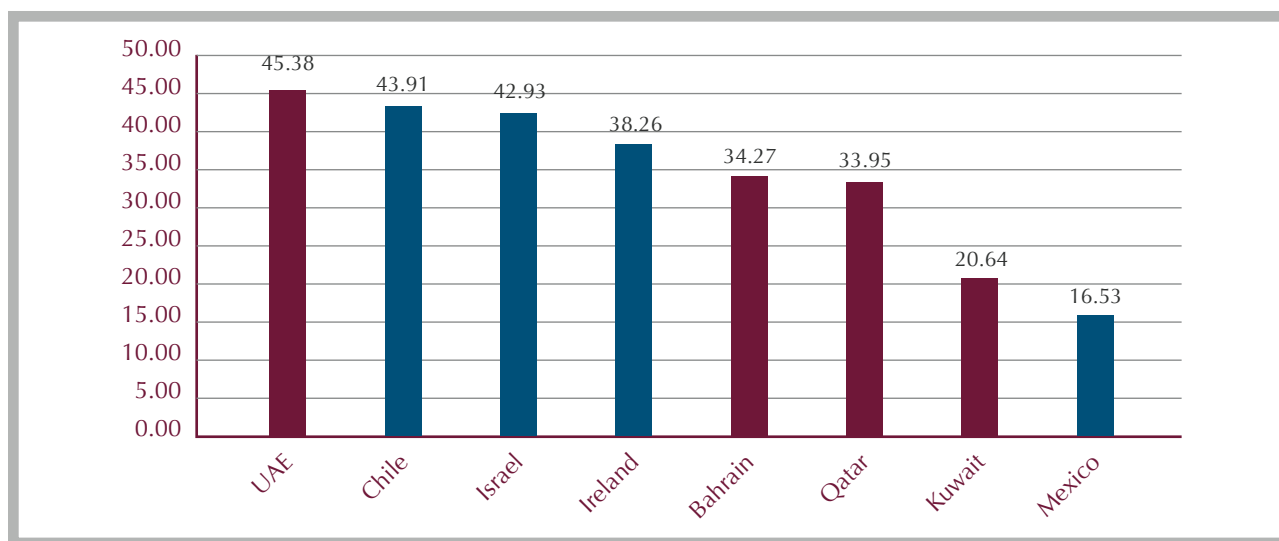
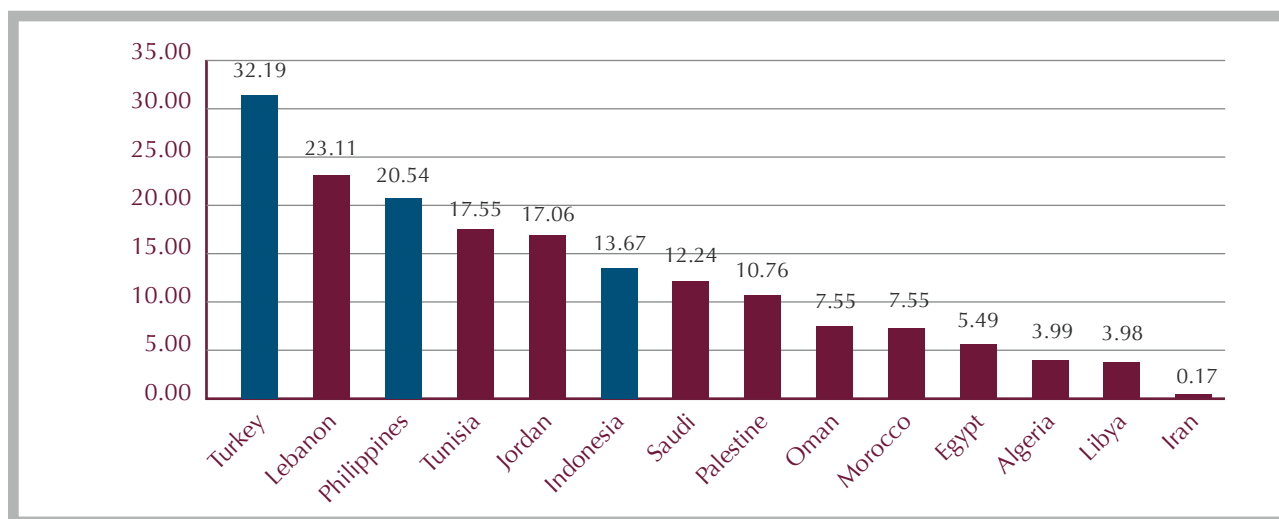


Figure 14: Comparison of Facebook Penetration Rates Among Select Medium DAI Countries (Dec. 2010)



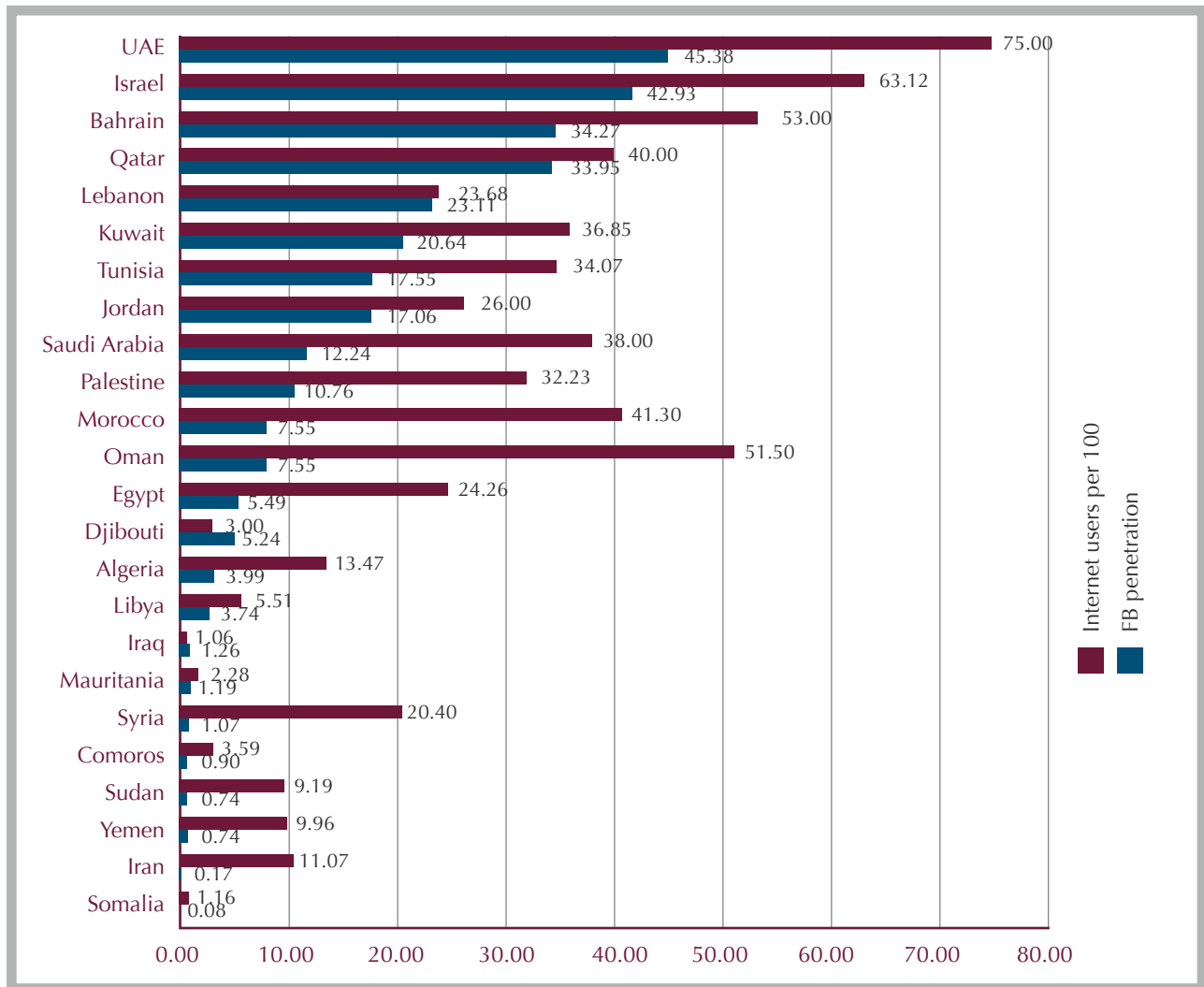
3.2 Internet penetration¹³, although included in the DAI, warrants further exploration as the main driver/barrier to Facebook usage and gives a good indication of potential for Facebook user growth. High Internet penetration does not necessarily correlate with high Facebook penetration (see Figure 15)

¹¹ <http://www.itu.int/ITU-D/ict/dai/>

¹² DAI figures were multiplied by 100 for easier comparison to Facebook penetration numbers in the chart.

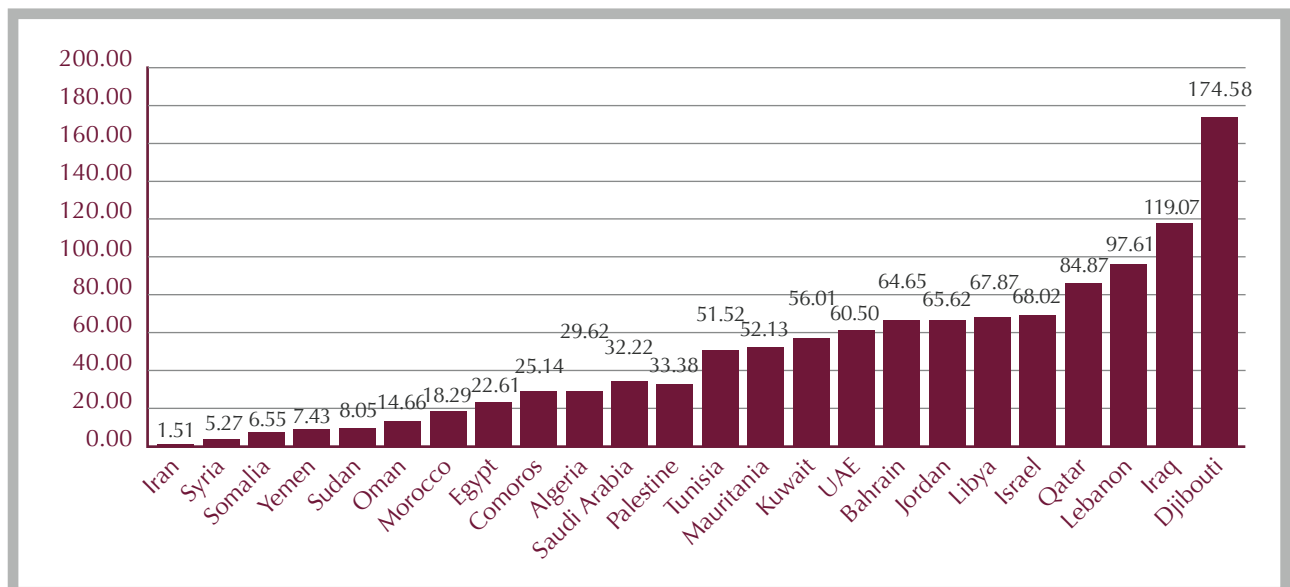
¹³ ITU statistics 2009, <http://www.itu.int/ITU-D/ICTEYE/Indicators/Indicators.aspx>, except Sudan, (UNDESA e-government survey 2010).

Figure 15: Facebook and Internet Penetration Rates in the Arab countries (plus Iran and Israel) (Dec. 2010)



Interestingly, a few Arab countries (Djibouti, Iraq) actually have more Facebook users than Internet users, indicating that many Facebook users in these countries rely on mobile access. (See Figure 16)

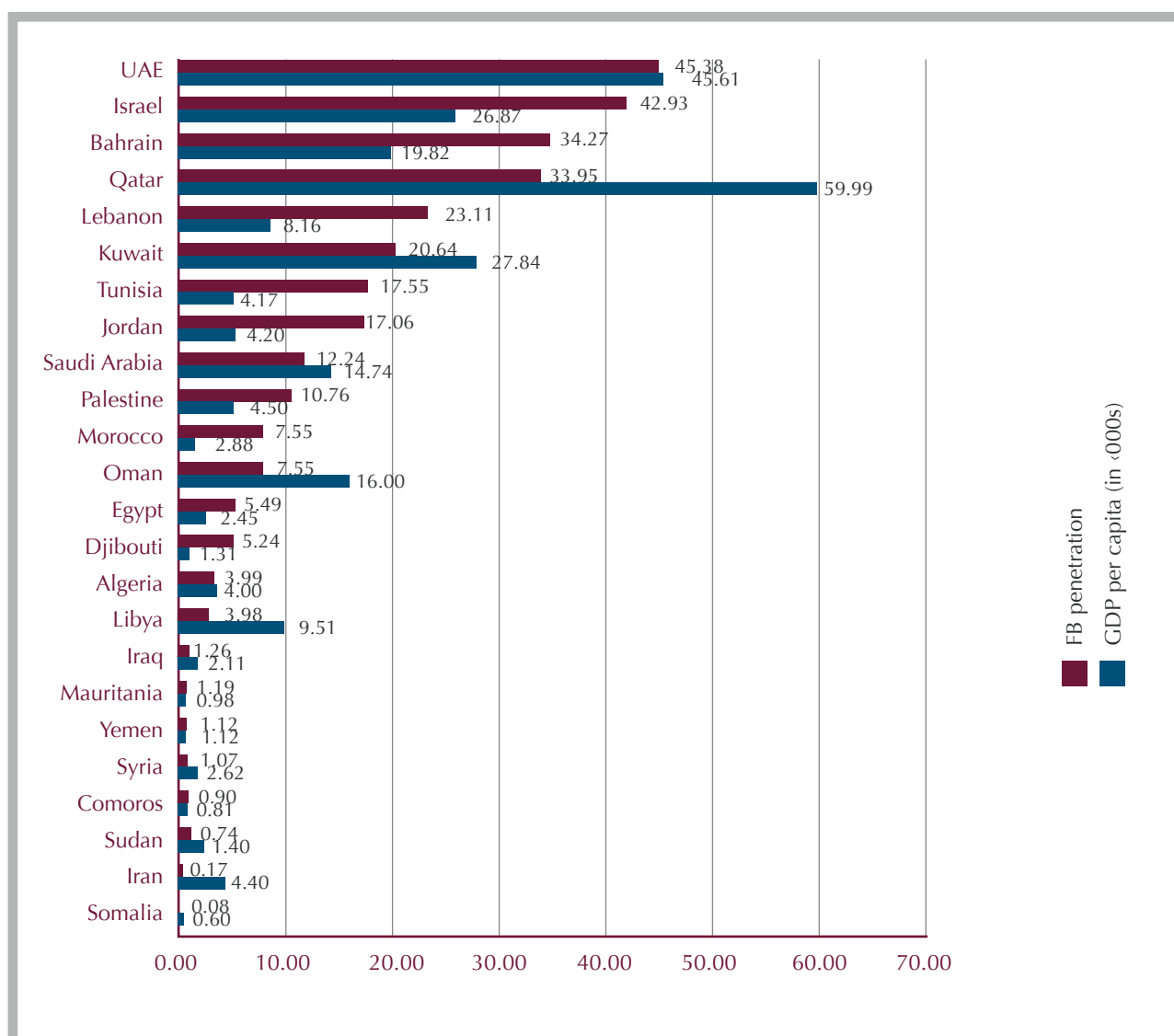
Figure 16: Facebook Users as Percentage of Internet Users in Arab Countries (plus Iran and Israel) (Dec. 2010)



“Interestingly, a few Arab countries (Djibouti, Iraq) actually have more Facebook users than Internet users, indicating that many Facebook users in these countries rely on mobile access.”

3.3 Income (specifically GDP per capita)¹⁴ correlates to Facebook penetration at either end of the spectrum (i.e., for countries with either very high or very low Facebook penetration), but less so for countries with a medium rate of Facebook penetration (Figure 17). As with the DAI, it seems other factors affect Facebook penetration in the medium range. Once again, Lebanon, Tunisia and Jordan seem to have much higher Facebook penetration rates than other Arab countries within the same income range, as does Palestine. Oman, Saudi Arabia and Libya all have low Facebook penetration in comparison with their GDP per capita, as well as in comparison to counterparts with the Middle DAI bracket previously mentioned.

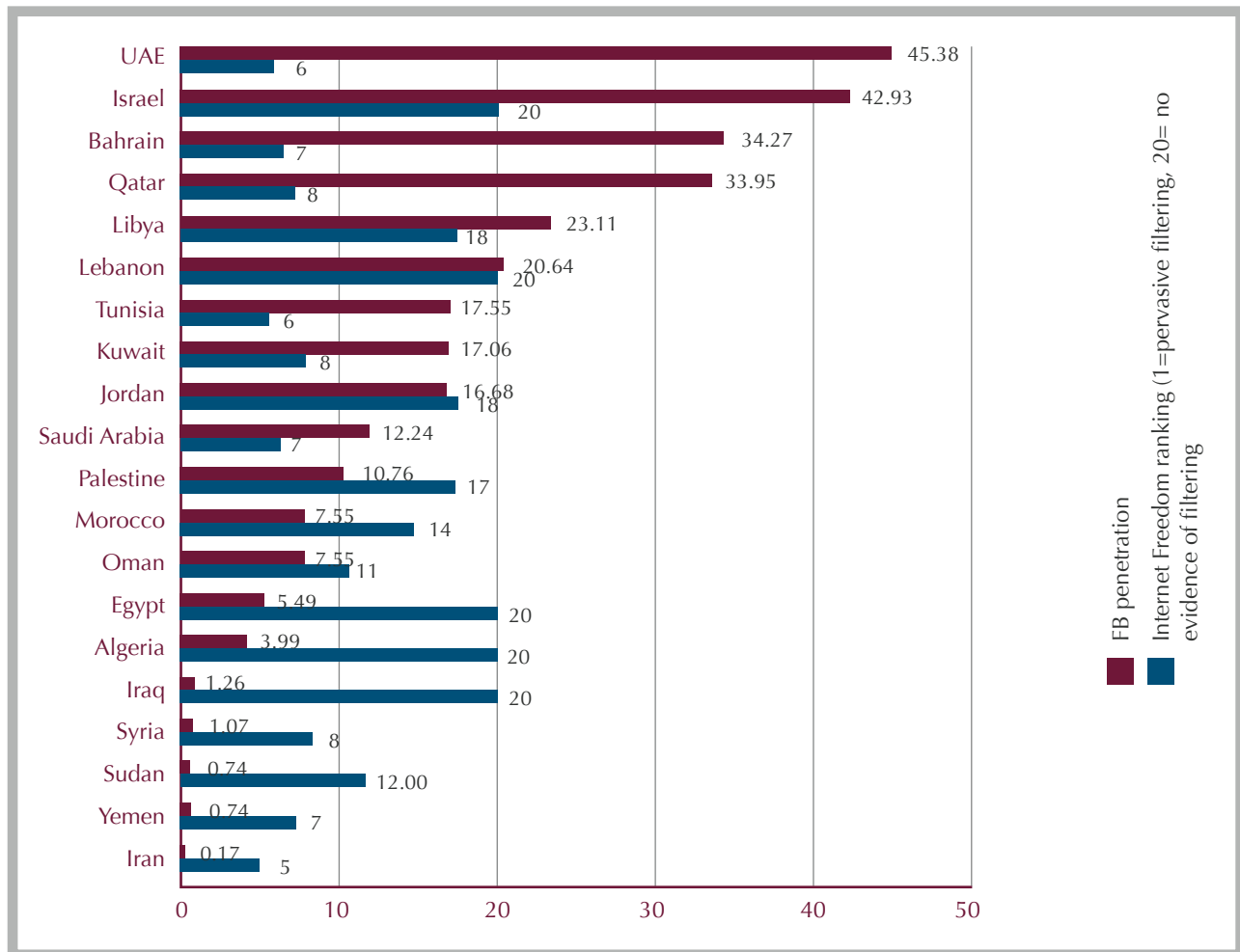
Figure 17: GDP per Capita and Facebook Penetration in the Arab Countries (plus Israel and Iran) (Dec. 2010)



¹⁴ 2009 estimates from IMF “World Economic Outlook Database,” <http://www.imf.org/external/pubs/ft/weo/2010/02/weodata/index.aspx>, except Palestine (http://www.pcbs.gov.ps/Portals/_pcbs/PressRelease/forecast_e.pdf) and Somalia (<https://www.cia.gov/library/publications/the-world-factbook/geos/so.html>)

3.4 Internet freedom: Rankings¹⁵ were developed based on the Open Net Initiative country profiles of internet filtering practices.¹⁶ Counter-intuitively, filtering does not seem to correlate with Facebook penetration. Some countries with lower scores (i.e., more pervasive filtering) have relatively high Facebook penetration (Figure 18). In fact, the top three Arab countries in terms of Facebook penetration (UAE, Bahrain and Qatar) have the lowest Internet Freedom rankings.

Figure 18: Internet Freedom Ranking and Facebook penetration in the Arab countries* (plus Iran and Israel) (Dec. 2010)



* Excluding Somalia, Djibouti, Comoros and Mauritania (no data available on Internet freedom rankings)

3.5 Other Development Indices: To further exploring other factors that may affect Facebook usage patterns, we compare country rankings in the **Global Gender Gap Index**,¹⁷—developed by the World Economic Forum to benchmark national gender gaps on economic, political, education- and health- based criteria—against the ratio of female to male Facebook users in the Arab region. These did not correlate, as the percentage of female Facebook users varies across the Arab region, while the Global Gender Gap Index seems to be rather consistent, except for Yemen). Overall, the Global Gender Gap Index across the region is on the low side, with rankings—out of 134 countries—ranging from 103 (the UAE, with the highest ranking in the region) to 134 (Yemen, with the lowest ranking of all countries measured).

As with the DAI and income factors, the **Human Development Index**¹⁸ (HDI)—developed by the UNDP to measure countries’ progress across the three dimensions of life expectancy, education and GDP per capita—also seems to correlate with Facebook penetration rates, albeit with some notable exceptions (see Figure 19).

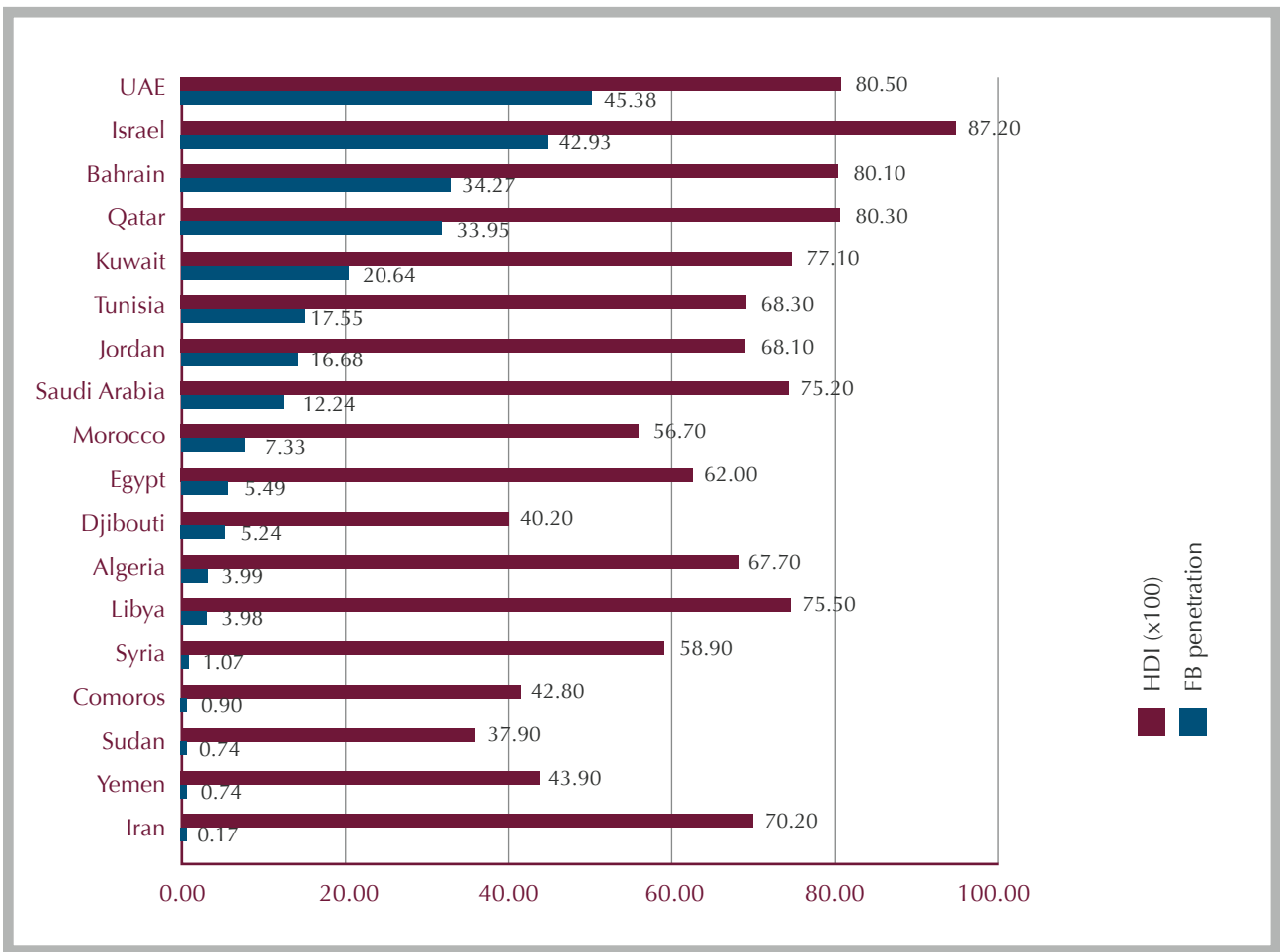
¹⁵ Ranking of 20 do not necessarily indicate a lack of filtering, but rather a lack of evidence of filtering.

¹⁶ <http://opennet.net/research/profiles>

¹⁷ WEP Global Gender Gap Report 2010

¹⁸ UNDP Human Development Report 2010

Figure 19: Facebook Penetration Rates and Human Development Index in the Arab Countries* (plus Iran and Israel) (Dec. 2010)



* Excluding Iraq, Lebanon, Palestine, Oman and Somalia (no data available on HDI)

“
The use of Facebook and new social media tools is quickly catching on in the region. This is mainly because of the large youth demographic that has shown a great propensity for these tools.
Given this large youth population and their affinity for Facebook and other social networking tools, the Arab countries with low Facebook penetration have room for growth in these platforms and their associated applications.
 ”

4. Analysis

4.1 Regional Overview

- Rates of users joining Facebook (as a percentage of population) over the past year (2010) are higher in the Arab region than in some of the countries with the highest Facebook penetrations in the world, indicating that the use of Facebook and new social media tools is quickly catching on in the region. This is mainly because of the large youth demographic that has shown a great propensity for these tools.
- Given this large youth population and their affinity for Facebook and other social networking tools, the Arab countries with low Facebook penetration have room for growth in these platforms and their associated applications. The UAE is the only country where user penetration exceeds the percentage of youth in the country, indicating a more mature penetration of social networking in the country.

Variance in penetration across the Arab region depends on several factors:

- In countries with very high or very low Facebook penetration, **DAI** and **income** seem to be factors in the uptake or adoption of Facebook. For example, the top three Arab countries in terms of Facebook penetration (UAE, Qatar and Bahrain) all have high DAI rankings and high GDP per capita, although Bahrain's GDP per capita is a bit low compared with other GCC countries; meanwhile, some of the lowest ranking countries in terms of Facebook penetration (Yemen and Iraq) also have very low GDP per capita and DAI rankings. However, in countries with medium penetration, other factors seem to come into play. These are explored in the "country spotlights" below.
- Similarly, countries with high Facebook penetration rates also have high **Internet penetration** rates, although not all countries with high Internet penetration have high Facebook penetration rates (Saudi Arabia and Oman, for instance) indicating possible social or cultural barriers. And in two countries (Djibouti and Iraq), Facebook penetration is actually higher than Internet penetration, indicating the popularity of mobile access, multiple users of the same Internet account, or the utilization of Internet cafes for those who do not have Internet access in their homes or workplaces.
- Countries with high Facebook penetration rates also have high **Human Development Indices**, although not all countries with a high HDI necessarily have high Facebook penetration rates (e.g., Saudi Arabia and Libya).
- The average **percentage of female Facebook users** in the Arab region (roughly 30%) is well below the world average of 54%. This is in line with the low levels of political and economic participation, and varying access to healthcare and education in the Arab world, as reflected in the relatively low rankings of the Arab countries in the 2010 Global Gender Gap report.
- Although there are variations in the percentages of youth in different Arab countries, **young Facebook users (between the ages of 15 and 29)** consistently dominate across the board in all Arab countries, exceeding the percentage of youth population. This indicates that they are main driving force behind the growing Facebook penetration rate.
- **Internet freedom** does not seem to affect Facebook penetration in the Arab region. Some countries with lower scores (i.e., more pervasive filtering) have relatively high Facebook penetration. This could be due to the creativity of the youth population in finding ways to bypass filters and censors.

Generally, countries at either end of the Facebook penetration spectrum behave "predictably" when it comes to the possible factors affecting their Facebook uptake (or lack thereof). The "top performers" mostly have high GDP per capita, high Internet penetration, high HDI and a high DAI (but low Internet Freedom rankings), while the "developing countries," for the most part, rank poorly in all these areas. For the "emerging countries," on the other hand, these factors do not necessarily correlate, indicating that there could be social, cultural and political factors as well, discussed below.

Internet freedom does not seem to affect Facebook penetration in the Arab region. Some countries with lower scores (i.e., more pervasive filtering) have relatively high Facebook penetration. This could be due to the creativity of the youth population in finding ways to bypass filters and censors.

4.2 Country spotlights

Some Arab countries stand out in terms of their Facebook penetration rates:

Countries with high Facebook penetration rates

The UAE, Qatar and Bahrain are on par with some of the top countries in the world, and surpass some of them in terms of new Facebook user penetration over the past year, despite having some of the lowest Internet Freedom rankings in the world. This could be because social media tools do not fall under Internet restrictions in these countries.

Countries with above-average Facebook penetration rates

Jordan, Lebanon, Palestine and Tunisia all stand out, with higher Facebook penetration rates than other Arab countries within the same GDP per capita and DAI brackets, (and rates equal to some of the global "Top 20" within their DAI bracket). Lebanon, Jordan and Tunisia are some of the most gender-balanced Arab countries as well, in terms of Facebook penetration. Possible causes for this above-average penetration could be that Lebanon has fewer restrictions on Internet and more freedom of speech than the rest of the Arab world. Jordan and Tunisia, on the other hand, have both taken great strides in advancing their ICT and e-Government strategies (respectively). Tunisia, in fact, is the best performer in the North African region, with a much higher Facebook penetration rate than Egypt, Algeria and Libya, even though they all have similar DAI rates. With regard to Palestine (and Tunisia more recently), Facebook usage tends to rise in times of conflict and unrest, as it can provide an outlet for discussion, communication and protest, especially among youth.

Countries with below-average Facebook penetration rates

Saudi Arabia and Oman both have lower Facebook penetration rates than countries in their same GDP per capita and DAI brackets. Given their relatively high income and Internet penetration compared to other Arab countries with similar Facebook penetration rates, other factors such as social and cultural norms and sensitivities could be holding back further Facebook penetration.

Annex 1

Methodology

In this first issue of the Arab Social Media Report, the focus was on the analysis of Facebook usage trends, as the most widely used social media platform in the world. Other social networking tools and platforms will be covered in future editions of the report.

The number of Facebook users in all 22 Arab countries, in addition to Iran and Israel, was collected periodically between April 22 and December 21, 2010, in the following age brackets—youth (15-29), and adults (30 and over)—as well as by gender, and correlated with several factors, including digital access, gender gaps, youth population, and Internet freedom.

Initially, raw data on a selected number of Arab countries was collected using Facebook's official internal data (Group A). This group was expanded later to include the remaining Arab countries (Group B), excluding Syria and Sudan (Group C), for which data had to be found from a source other than the Facebook. Due to American technology export laws, Facebook does not provide data on the number of users in Syria, Sudan and Iran for advertising purposes. The real numbers of Facebook users in Syria and Iran (in November 2007 and June 2008, respectively) were located through an online search; no such data for Sudan was found, so all Sudan data was estimated using the Arab daily growth rate. To retroactively fill in the missing data for Groups B and C, the Arab daily growth rate from the Group A countries was calculated. This rate was used to calculate the number of users in all countries in groups B and C, for consistency's sake, to ensure a smaller error margin than using the growth rates of similar countries for each individual country.

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

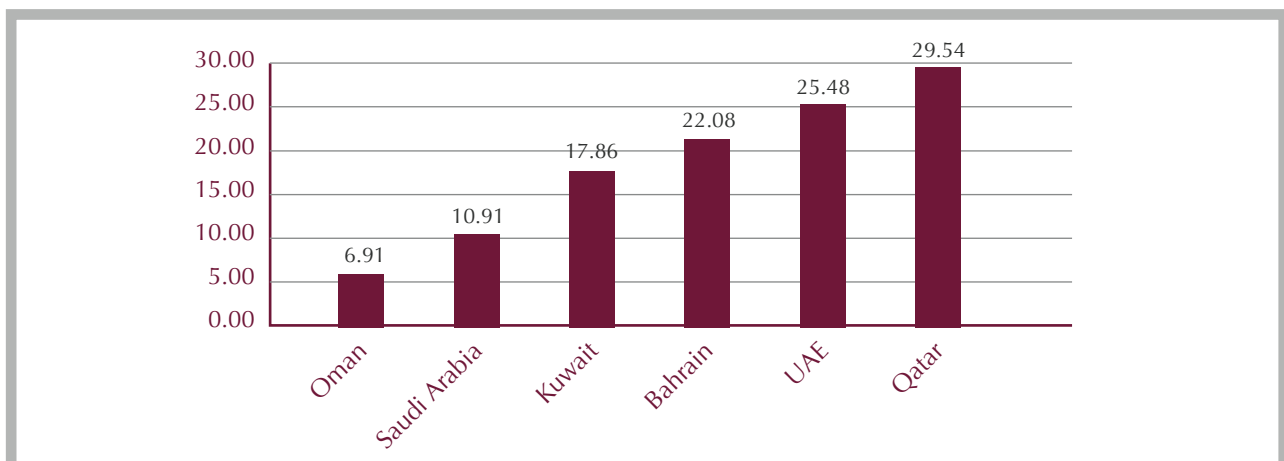
Annex 2

Updated Populations

Table 2: Facebook Users and Official Population Figures for the GCC Countries¹⁹

Country	Population	Facebook users	Facebook penetration (rate in %)
Oman	3,103,580	214,500	6.91
Saudi Arabia	27,136,979	2,962,000	10.91
Kuwait	3,484,881	622,400	17.86
Bahrain	1,234,596	272,580	22.08
UAE	8,199,996	2,089,400	25.48
Qatar	1,699,435	502,000	29.54

Figure 20: Facebook Penetration Rates of GCC countries (using official population figures)



¹⁹ Arab ICT Use Report 2010, Madar Research, Dubai

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The Governance and Innovation Program at DSG conducts research and programmatic activities focusing on policies for government innovation and development through information technologies in the Arab states. The objectives of the program are aligned with stated regional governments' 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 a regional network 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 Dubai School of Government (DSG) is a research and teaching institution focusing on public policy in the Arab world. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, in cooperation with the Harvard Kennedy School, DSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Dubai School of Government also collaborates with regional and global institutions in 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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