Facebook Marketing
Why Global Brands Need to Change Strategies in the Middle East
Why Read this Report

In the past three years, the Arab World has steadily embraced business opportunities from social media. With many global brands operating in the region, several have extended their international strategies to the local market. Regional and local brands have also been prone to look outwards for inspiration from global trends and concepts.

As with most social trends, however, we have discovered that unique habits exist in the region, creating the need for more localized and customized approaches to how we use social media.

Beginning with Facebook, the most popular social network in the region, this report will introduce you to some of the differences between users in the Middle East as compared to their US counterparts.
The 5 People
Who can Make Use of this Research

This research aims to share The Online Project’s findings when comparing data of Facebook users in the Middle East to the United States. We have analyzed age, gender, relationships and language among other self identified traits, to get a deeper understanding of who we are communicating with.

At The Online Project, we have been using this data to develop more customized and effective strategies to communicate on behalf of our brands. We hope you find valuable uses for the data as well.

While many people will find the data interesting in and of itself, we believe there are five types of people who will benefit most directly from this research:

1. The In House Social Media Champion
2. The Agency Strategist
3. The Community Manager
4. The Advertising Executive
5. The Product Developer
The Key Takeaways

• When global brands want to extend their social media strategies to the Middle East, they must take note of the different social indicators. Primarily the average number of friends in the Middle East is lower than US averages; relationship settings and gender preferences are also significantly different. Such differences are an indication of a younger and more conservative culture in the region.

• In order to apply strategies across the region, agencies must take into account the differences in trends within each county in the region. Iraqi users, for example, have a much lower average of friends per user than Jordanian users. This is an indication of the limitations and challenges of viral marketing in that country.

• Photo use continues to be a trend in the region. With many countries that suffer from unstable internet access which may cause web video campaigns to be a challenge, photo campaigns have a higher chance of success as they are used naturally in the regional Facebook population.
The above findings show details of a sample collected from equal numbers of male and female Facebook users. As listed above, the average number of photos in the profile album is at 25, and the average number of uploaded albums is 11 for this sample. The average number of tagged in photos, on the other hand, is 271, whereas the average number of total uploaded photos is highest at 444. Moreover, the average number of pages connected to is 80, while the average total arts and entertainment selection is 20. Finally, the average age for the sample is 25, which could shed a light on likely patterns of using certain Facebook features such as uploading photos.

<table>
<thead>
<tr>
<th>Profile Information</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Photos in Profile Album</td>
<td>25</td>
</tr>
<tr>
<td>Number of Uploaded photos</td>
<td>444</td>
</tr>
<tr>
<td>Number of Uploaded Albums</td>
<td>11</td>
</tr>
<tr>
<td>Number of photos tagged in</td>
<td>271</td>
</tr>
<tr>
<td>Number of pages connected to Arts and Entertainment</td>
<td>80</td>
</tr>
<tr>
<td>Age</td>
<td>25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Average No. of Friends</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>133</td>
</tr>
<tr>
<td>Middle East</td>
<td>59</td>
</tr>
<tr>
<td>Jordan</td>
<td>90</td>
</tr>
<tr>
<td>Sudan</td>
<td>75</td>
</tr>
<tr>
<td>Iraq</td>
<td>22</td>
</tr>
<tr>
<td>Lebanon</td>
<td>79</td>
</tr>
<tr>
<td>KSA</td>
<td>43</td>
</tr>
<tr>
<td>Bahrain</td>
<td>60</td>
</tr>
<tr>
<td>Kuwait</td>
<td>45</td>
</tr>
</tbody>
</table>

The table above provides an overview of the average number of friends reported across different countries. The highest average number of friends is reported for the US at 133, followed by the Middle East at 59. The lowest average number of friends is reported for Kuwait at 45.
Executive Summary

**boys vs girls**
- Highest gap between males and females: Iraq: 45.8% male dominated
- Lowest gap between males and females: Lebanon: 4.5% male dominated

**languages**
- 53% People Using Facebook in English
- Countries that use Facebook the MOST in Arabic:
  - Palestine
  - Egypt
  - Iraq
  - Saudi Arabia
- Countries that use Facebook the LEAST in Arabic:
  - Lebanon (5%)
  - UAE (5%)

**old vs young**
- Palestine is the youngest country
  - 43.6% of the population is between 18-24

**relationship status**
- USA
  - Majority LIST status
  - 44% Interested in women
  - 33% are single
  - 43% are married
- Middle East
  - Majority do NOT
  - 85% Interested in women
  - 52% are single
  - 29% are married

**Facebook friends**
- Average friends per user
  - USA 133
  - Jordan 90
  - Sudan 75
  - Lebanon 79
  - Iraq 22
  - KSA 43
  - Bahrain 60
  - Kuwait 45

**average vanity numbers per user**
- 11 uploaded photos
- 444 uploaded photos
- 271 tagged photos
- 20 entertainment pages
- 25 profile pics
- 80 connected pages
Egypt dominates Facebook presence in the Middle East

Egypt takes the lead in having the largest share of Facebook users in the selected Arab countries of the region followed by, UAE, Jordan, Iraq, Lebanon, Palestine, Kuwait, Qatar, Oman and Bahrain.

The UAE has the highest population to Facebook users in the region

Participation to population ratio refers to the prevalence of Facebook participation in a given country relative to its population. UAE has the highest participation to population ratios when compared to large population countries such as Egypt.
Gender Differences

Iraqi users have the biggest gender gap on Facebook

Gender ratio analysis indicates that the higher share of Facebook users belong to male populations in all of the selected countries. Iraq noticeably displays the greatest gap between the number of male and female users while Lebanon shows the lowest gap. It is worth noting that all selected countries of the GCC region with the exception of Bahrain, also show a relatively high percentage difference between male and female users.

Facebook is more male dominant in the Arab world, female in the US

In line with the above findings, the overall population of Facebook users in the Arab region is predominantly male with an overall gender difference of 30%. Interestingly when comparing with advanced markets such as the USA, the percentage difference between genders stands much smaller at 10% and female users occupy a greater space on Facebook.
Age Differences

Youth continue to dominate Facebook
Age per country breakdown analysis shows that age groups 18-24 and 25-34 take turns in dominating Facebook space in most countries of the region. As a percentage of country users, Palestine has the highest users to population ratio of 18-24 year old users at 46%. Followed by Iraq at 40%, Egypt at 39% and Lebanon at 36.1%. Countries with the highest 25-34 year old users to population ratios on the other hand belong to UAE at 45.8%, Kuwait at 42%, Qatar at 42% and KSA at 36%. Age groups 13-17 and 35-44 stand in the middle range in most countries at a high 23.5% and low 6.1%. While age groups 45-55 and 55+ represent the lowest population on Facebook across all selected countries.

Youth bulge is more pronounced in the Middle East than the US
While the prevailing age groups in the selected Arab countries and USA are 18-24 and 25-34. Arab countries have a much higher percentage difference between these age groups and the rest of the population compared to the USA. Older age group populations (35-44+), however show greater presence on Facebook in the USA relative to Arab countries. This indicates the existence of a predominately young audience on Facebook in this region compared to the west.
Language Settings

Palestine uses Arabic setting more than any other Arab country

Language setting preference of users in the region shows an overall higher tendency to set Facebook’s language setting into English. Interestingly though this is not true for certain countries such as Palestine where 68% of Facebook users chose Arabic as their language. Showing similar behavior is KSA at 58%, Iraq at 56% and Egypt at 53%. On the extreme opposite end, Lebanon, UAE and Qatar share the least number of users with Arabic language settings at 5%, 9%, and 15% respectively. It should be noted, however, that using the Facebook interface in English does not denote a preference to communicate predominantly in that language.

Arabs use English (as a setting)

The overall percentage breakdown of language settings in selected countries of the Arab region shows more than 50% of users have chosen English as their default language on Facebook compared to 44% who chose Arabic and a minor 3% who chose other.
Social Relationships

Iraq hides relationship status the most
Analysis shows that the majority of Facebook users in the selected Arabic countries do not disclose their relationship status information on their profiles. As a percentage of total country users and in comparison with the rest of the countries, Iraq displays the highest percentage of unavailable data when it comes to relationship settings at 77.2% while UAE displays the lowest at 57.7%.

Arabs disclose less about their relationship status than the US
A major 64% of Facebook users in the Arab region do not share relationship setting information relative to 36% who do. At the opposite end, 70% of users in the USA do share information regarding their relationship status which highly reflects the cultural differences in both regions.
Social Relationships

UAE has the closest balance of single to married ratio

Of the available data on the relationship status of users, we analyzed data to show the share of different social status information in each country. As a percentage of country users, Iraq displays a high 61% “Single” relationship status compared to “Married” at 26%. UAE on the other hand displays an almost even 41% “Single” and 42% “Married” relationship status. Data also shows “Engaged” percentage share is lowest in all selected countries.

Most Arab Facebook users are single, majority of US are married

Analysis shows that “Single” and “Married” relationship statuses dominate both the Arab countries and USA for the available data. The Arab region however, displays a greater gap between both statuses in comparison with the USA. Noticeably, “In a relationship” status is also more pronounced in USA relative to the Arab region, indicating the behavioral and cultural differences.
Most countries don’t disclose gender preferences

Analysis shows that the unavailability of data in the “Interested in” section is higher across all selected countries in the region.

Most people in Arab world interested in women

All selected countries in the region display a tendency towards expressing their interest in women. The population used belongs to both male and female users who provide relationship status information. As percentage of a country’s population, Iraq displays a high 88% users interested in women compared to 12% in men. Similarly, Egypt displays 87% interested in women status relative to 13% in men.

Arab world and US both have most users who are men interested in women

The majority of selected Arab region Facebook users express interest in women in their social setting information at a staggering 85%. USA Facebook users on the other hand display different behavioral patterns as 44% express interest in women versus 56% in men. This also is an indication of cultural differences.
Recommendations

- When creating pages that target the Middle East, develop localized content strategies that cater to the differences covered in this report. You can use the native Facebook targeting features or customized options offered by advanced social media management systems (SMMS) to push your content to the relevant audience.

- Segmenting your content strategies also has its benefits as you will be able to write in local dialects when using Arabic.

- Although many countries use a mix of English and Arabic Facebook interfaces, test out the content of your own page to see what gets better reactions. Just because users in Lebanon for example use the Facebook English interface more frequently, this is not necessarily an indicator that they will respond more to English content.

- When creating social campaigns for countries with low friend per fan averages, consider using external forces like Facebook advertising to drive the campaign further. Low averages indicate a limited viral coefficient and potential.
Conclusions

- Many reports have been published internationally that display overall trends. The data here, especially when compared to the USA, indicates that Facebook users are not acting uniformly across the globe.

- As the number of brands and organization tapping into social media opportunities to connect with their consumers growth, we should continue to further differentiate between online segments – by industry, countries, and demographics.

- We encourage all practitioners to actively look at the trends happening within their verticals and continuously raise the bar in how accessible we make our companies and how effectively we drive our communication strategies.
Contributors and special thanks

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Research objectives & Methodologies

The objective of this report is to focus the lens on Facebook’s users population within the selected Arab region. Starting by a quick glance at the prevalence of Facebook in each individual country, followed by a description of general demographics information including social demographics within that country and in comparison with the United States as a benchmark. Finally, taking a closer look at growth trends displayed across all countries during a period of approximately six months.

Data collection utilized Facebook’s Advertisement Platform, in order to collect data on users’ demographics information in each of the listed countries. This data was collected in one batch during mid November and repeated in March. Exceptions are; the data on “Friends of Fans” which was collected using Facebook Insights from a sample of regional pages containing a total of 368,141 users. In addition to the data on the sample of users from the specific countries mentioned in the report which was collected using convenience sampling as data was easily accessible through this method; the sample contains a total of 162 users. As for the data used to analyze growth trends per country, it was also collected using Facebook’s Advertisement Platform, however at two weeks intervals between May and November 2011 and again in March 2012 in order to validate the consistency and current data.

Open Research

This independent research was 100% funded by The Online Project. We want this research to spread at no cost. Please attribute the source of the research where possible.
About TOP

As the Middle East’s leading social media agency, The Online Project develops and executes social media strategies for Fortune 500 companies and high profile organizations operating in the region.
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