



MENA Twitter Habits Survey

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Summary

2009 has been a big year for Twitter with the micro-blogging platform's rate of growth rocketing up to more than 20% per month and now showing annual growth of 1,460 percent (June 2008 to June 2009) according to Comscore. Although it's still early days for Twitter in the Middle East and North Africa, Twitter is now growing fast and the numbers of Twitter users in the Middle East and North Africa is now increasing at a rate of 17% per month. The MENA Twitter community overall has increased nearly 300% over the first six months of 2009.

Spot On Public Relations has been active on Twitter since August 2008 and has been tracking Twitter usage in the MENA region. This report is the result of the region's first extensive Twitter usage survey which focuses on the Twitter habits and experiences of a sample of 216 registered Twitter users across the region.

Here are some of our survey's key findings:

- 54% of respondents are following 100 – 499 other Twitter users
- 53% have 100 – 499 followers
- 35% of Twitter users tweet 2-5 times per day
- 64% typically tweet every day of the week
- Contrary to global trends, twice as many men in our Middle East and North Africa survey use Twitter than women (other surveys show a similar male bias on Facebook in MENA)
- 99% of those surveyed tweet in English, 26% tweet in Arabic
- Only 50% of Arabic speakers tweet in Arabic
- 39% tweet mainly with other Twitter users in the Middle East
- 61% of MENA Twitter users surveyed say that Twitter has affected their perceptions of a brand
- 70% of MENA Twitter users say they have formed a more positive perception of a brand due to Twitter and 52% say that they have formed a more negative perception of a brand due to Twitter
- 48% of users surveyed say that they have often been alerted to a major story via Twitter, 54% say that Twitter has lead them to a blog or website and 21% say that they have tuned into a TV program as a result of Twitter
- 32% of users say that they have bought a product or service as a result of recommendations on Twitter
- 96% of users expect to continue to user Twitter as much as they do today or even more in the future

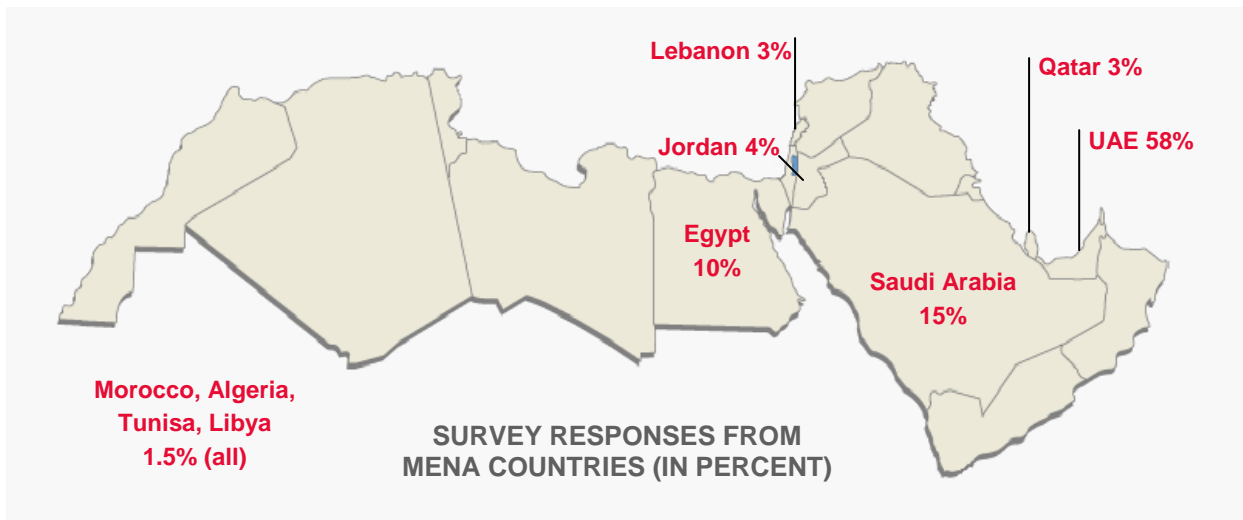
Some key assumptions

Due to the lack of data available on Twitter and other social media in the Middle East and North Africa, the low level of social media marketing in MENA and the early stage of adoption of the Twitter platform across the region, Spot On Public Relations based its survey approach, questions and conclusions on the following assumptions (based on its own experience with social media, monitoring Twitter activity across the region and feedback from other social media users in MENA).

1. Adoption of Twitter in the Middle East and North Africa region is broadly following the technology adoption life cycle and Twitter adoption is in the early adopter phase. Most users of Twitter are users of other social media and many of them have a keen interest in the web.
2. Twitter demographics are changing in different ways and at varying speeds across the region. The UAE has more 'mainstream' users, but these are often brought onto Twitter by an event, campaign or special interest (for example, followers of Dubai92 FM radio DJ Catboy; followers of Paris Hilton; or followers of Intercontinental DFC's Spring-Summer Twitter competition).
3. There are an increasing number of Arabic speakers using Twitter, however the majority are Internet and technology power-users and so are also fluent in English. Spot On expects this to change over the next 6-12 months.
4. Due to the number of different countries, cultures, languages and levels of Internet development, it's dangerous to assume that demographics and Twitter habits research holds true for Twitter users in the Middle East and North Africa region.

Who responded?

Spot On invited more than 750 Twitter users from across the Middle East and Africa to take part in this survey. 270 Twitter users undertook to start the survey from August 8th to 14th, of which 241 were based in the MENA region. Of those 241 MENA users, 216 completed the full survey (a completion rate of 89.63%).



Response to the survey was quite high for the Egypt, Saudi Arabia and the United Arab Emirates and much less so for the rest of the Middle East and North Africa. However, with total Twitter user numbers in the low hundreds for many countries across the region, it's not possible to read too much into why the response was low from many countries or the reasons that users might have had for not participating. Critical mass of Twitter users in Egypt, Saudi and the UAE certainly helped in encouraging users to participate.

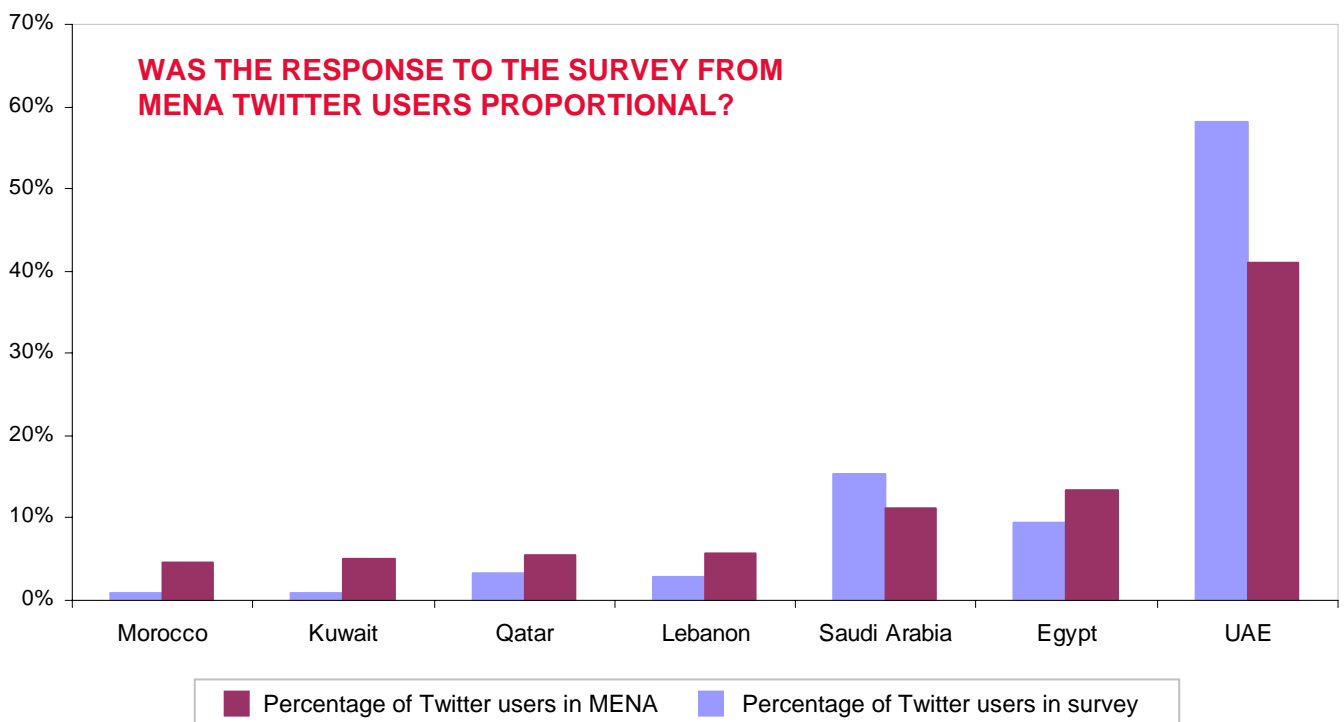


Chart 1 – Survey response from largest MENA Twitter communities (as a percentage)

Twitter growth

40% OF MENA'S TWITTER USERS ARE LOCATED IN THE UAE

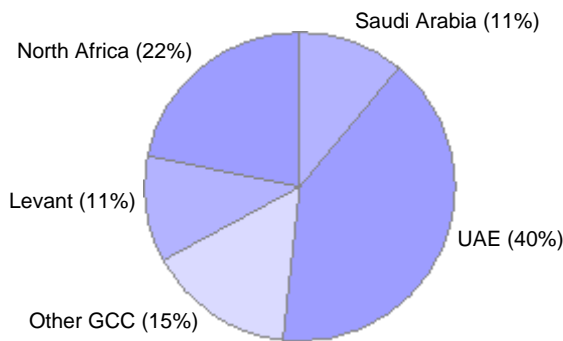


Chart 2 – Twitter users by location (in percent)

Year of the tweet!

2009 has been a big year for Twitter with the micro-blogging platform's rate of growth rocketing up to more than 20% per month and showing annual growth of 1,460 percent (June 2008 to June 2009) according to Comscore. Although it's still early days for Twitter in the Middle East and North Africa, Twitter is now growing fast and beginning to take hold in Internet communities across the region, in particular in the United Arab Emirates, the Kingdom of Saudi Arabia and Egypt.

According to Spot On's estimate, there were just 1,335 registered Twitter users in the MENA region in December 2008 and this number has increased to 14,296 in August 2009. While the UAE leads the region in numbers and user activity, the fastest growing area of the region is now Lebanon, Syria and Jordan which all had negligible numbers of users in the first few months of 2009 and can now be measured in the hundreds.

It's perhaps worth noting that official user statistics have not been made available by Twitter for the MENA region and the last figures that were made public by Sysomos for the region suggest that there may be 10% more total registered users than estimated by Spot On.

17% MORE MENA TWITTER USERS IN AUGUST

	Registered Users (Aug)	% Growth (Jul-Aug)	% of MENA total
UAE	5,778	17%	40%
Saudi Arabia	1,578	12%	11%
Qatar	768	14%	5%
Kuwait	723	16%	5%
Oman	353	62%	2%
Bahrain	340	1%	2%
GCC total	9,540	16%	67%
<i>Yemen</i>	33	0%	0.2%
Lebanon	819	29%	6%
Jordan	445	16%	3%
Syria	320	56%	2%
Levant total	1,584	30%	11%
Egypt	1888	8%	13%
Morocco	641	17%	4%
Tunisia	367	20%	3%
Algeria	151	15%	1%
Libya	92	33%	1%
North Africa total	3,139	12%	22%
MENA TOTAL	14,296	17%	100%

Table 1 – Estimated number of Twitter users by country, percentage growth July-August '09 & percent of MENA total

Demographics

The demographics of the Middle East and North Africa Twitter community are significantly different from those of the USA and, in fact, compared with global statistics. This probably has very much to do with the region being late to the party and Twitter communities being largely composed of early adopter audiences drawn to Twitter by influences such as the news media rather than starting with youth audiences as has happened elsewhere.

Missing youth

Spot On estimates that 15-19 year old users account for less than 10% of Twitter use across MENA and this age group represented less than 5% of our survey respondents. However, the 15-19 year old age group was much less evident in survey respondents from the UAE accounting for just 1.44% of our UAE survey.

77% of respondents from the UAE and 69% overall in the survey were between the ages of 25 and 39. Age groups over 40 accounted for 8% of respondents overall and more than 10% in the UAE, compared with less than 1% globally. All indicators confirm that MENA's Twitter communities are older than those of North America and around the world.

Languages

54% of those surveyed were Arabic speakers (that figure jumps to 80% when looking at respondents outside of the UAE), 18% spoke French and 3% spoke Farsi. All those surveyed said that they spoke English, consistent with the assumption that Twitter is in the early adopter stage in MENA and that the survey itself was conducted in English only. 25% stated that they spoke languages other than the above.

TWITTER USERS BY AGE GROUP

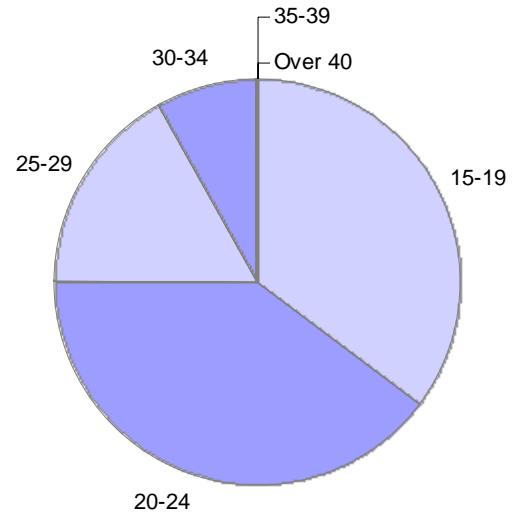


Chart 3 - Global (Sysomos, June 2009)

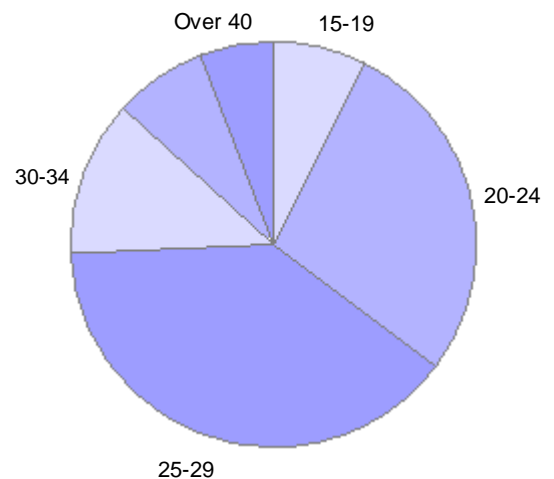


Chart 4 - Arab world excluding UAE

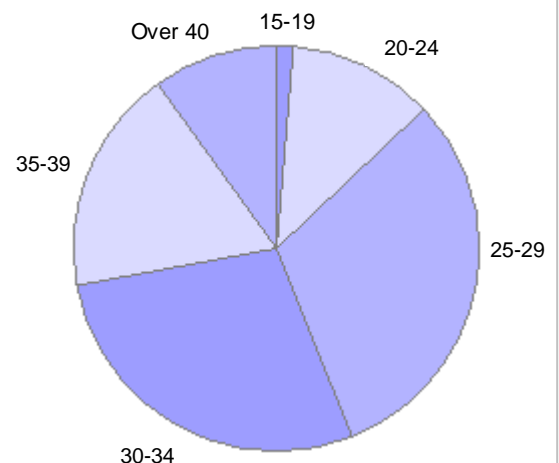


Chart 5 - UAE Only

68% OF RESPONDENTS WERE MALE

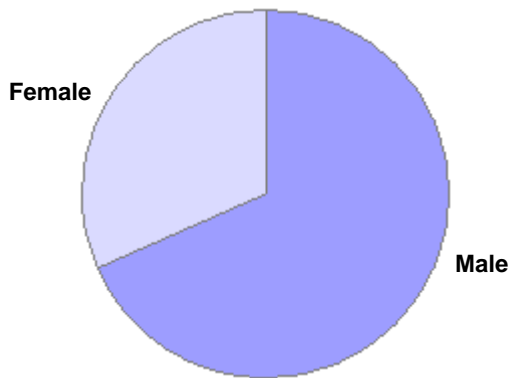


Chart 6 – Gender of survey respondents

Gender bucks global trend

Contrary to the global Twitter trend, more than half of our survey respondents were male: 68% across the whole survey and 75% outside the UAE. The most female respondents lived in the UAE. According to the global Twitter survey conducted by Sysomos in June 2009, there are more women on Twitter (53%) than men (47%). Even taking into account a margin for error, it is clear that the Middle East & North Africa Twitter community is currently male dominated (which is also consistent with recent findings from O'Reilly Research on MENA Facebook demographics).

Occupation: no mommy-bloggers?

78% of those that completed the survey were employed or self-employed, which is consistent with many Twitter users experience of the MENA Twitter community. Only 13% of survey respondents described themselves as students, again a demographic that is underrepresented compared with Twitter's American home base. 3% of the survey was either unemployed, retired or housewives and so it seems the mother and housewife demographic that is become increasingly important on social media for marketers in the USA, could be largely absent from the MENA Twitter community.

IT & Web professions dominate; except the UAE

Information technology and services and *Internet* professions combined accounted for the largest segment of the MENA Twitter Survey: some 18% overall, jumping up to 29% outside the UAE. However, not in the UAE where IT and Internet professionals accounted for just 12.5% compared with 23% in advertising, marketing and public relations and 17% in media, media production and publishing.

Many nationalities

As one might expect in a region that has millions of expatriate residents our Middle East and North Africa survey, nearly half of our survey was composed of nationals from countries outside the Arab world. Predictably, the UAE had the largest number of foreign nationalities, with only 8% of the 140 respondents being Emiratis.

SURVEY RESPONDENTS BY NATIONALITY

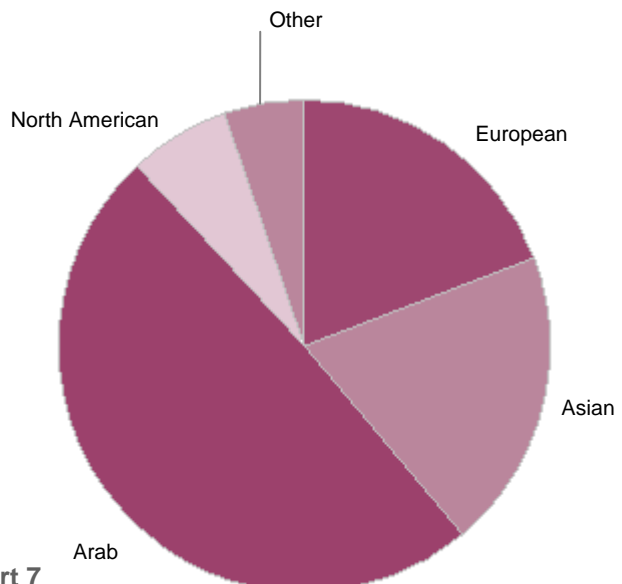


Chart 7

User activity

It perhaps goes without saying that the Middle East Twitter Habits Survey does not include those registered users with inactive Twitter accounts. Almost all of the outreach to the Twitter community for this survey was conducted via Twitter and therefore anyone offline during the survey time won't have been included in this survey (although we did receive results from people's hotel rooms whilst on their vacation). According to Sysomos Inc.'s global survey of Twitter users, 85.3% of all users post less than one update (or tweet) per day, while 21% of users have never tweeted at all. 69% of those surveyed by Spot On in the MENA region tweet at least once per day and 61% more than once per day. MENA's Twitter community may still be small in numbers, but it's quite active in terms of user activity.

35% TWEET 2-5 TIMES PER DAY, 16% TWEET MORE THAN 10 TIMES

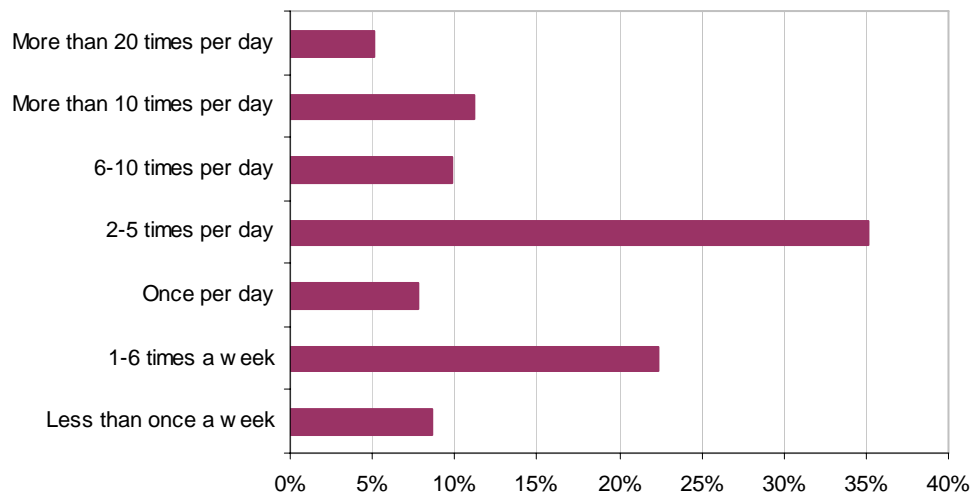


Chart 8 - How often do you update your status on Twitter?

Only 30% take a break

70% of those surveyed across the MENA region admitted to using Twitter every day of the week, leading us to conclude that only 30% take a weekly tweet-free break!

44% expect to Tweet more in future

When asked "Do you expect to spend more time or less time on Twitter in the future?" only 4% of those surveyed expected to spend less time using Twitter. 52% expected to be using Twitter at about the same rate in the future, whilst 44% expected to be using Twitter more in the future.

WHICH DAYS OF THE WEEK DO YOU TYPICALLY USE TWITTER?

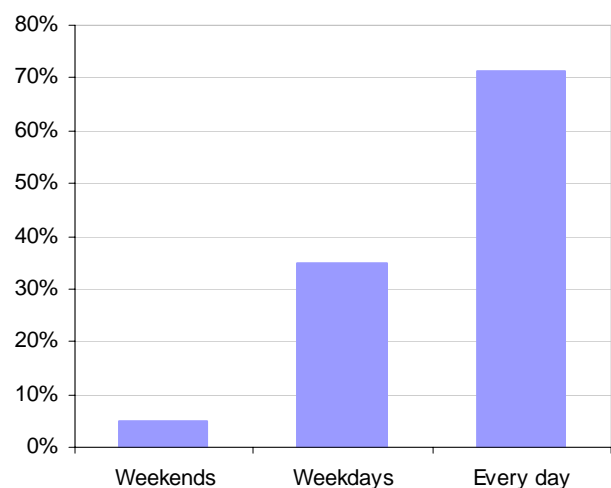


Chart 9

Following with clear purpose

It's a fact that most registered users of Twitter have less than 100 followers (and tweet less than once per day) and so it's reasonable to assume that this survey is weighted towards the MENA Twitter community's *power-users* than *newbies*. Spot On also believes that it's likely that many MENA Twitter users quickly develop Twitter-goals for themselves and are therefore focused on tweeting to, interacting with and following specific demographics of Twitter user. This is consistent with the fact that MENA's Twitter community is overall an older crowd than in the USA.

77% of those surveyed disclosed that they follow more than 100 other Twitter users, while 80% disclosed that they were followed by more than 100 other users.

54% FOLLOW 100-499 OTHER TWITTER USERS

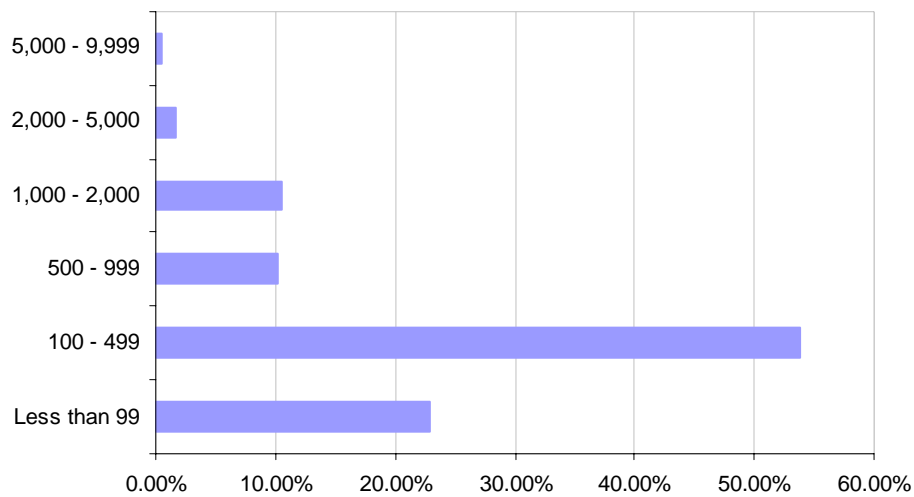


Chart 10 - How many users do you follow on Twitter?

53% ARE FOLLOWED BY 100-499 OTHER TWITTER USERS

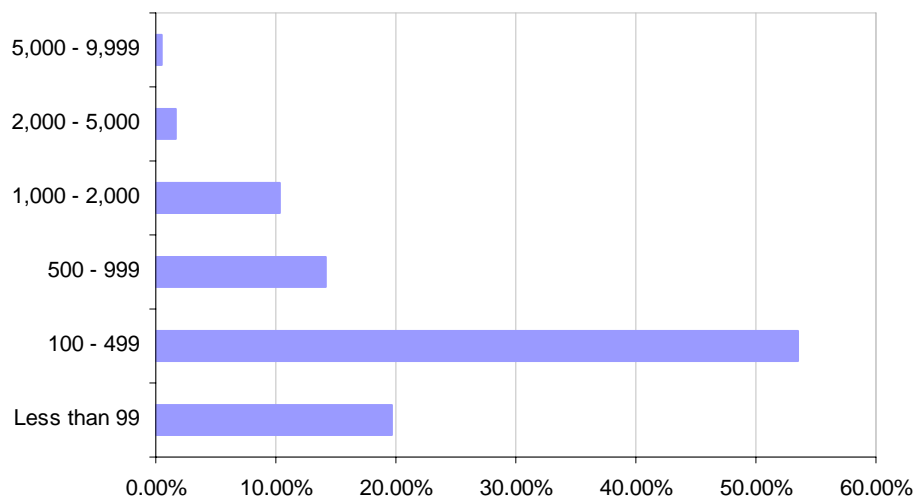


Chart 11 - How many Twitter users follow you?

Tweeps at work

The impact of social media on the workplace has been much debated over the past couple of years and one objective of the Middle East Twitter Habits Survey was to identify how many people were motivated to use by business interests and what how much influence Twitter has for people at work. 90% of the people in our survey had some personal motivation for opening a Twitter account, but only 10% said that they opened their Twitter account for purely business reasons.

REASONS FOR OPENING FIRST TWITTER ACCOUNT

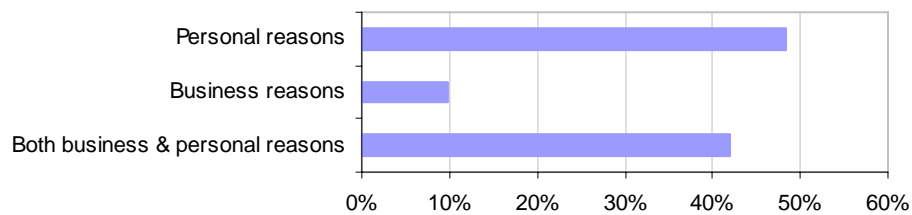


Chart 12 - Did you open your first Twitter account mainly for business reasons or personal reasons?

Whilst less than 50% of respondents stated their motivation for opening a Twitter account was at all business related, 78% said that they were employed or self-employed and nearly 80% said that they tweeted often from the office.

LOCATIONS MOST TWEETED FROM

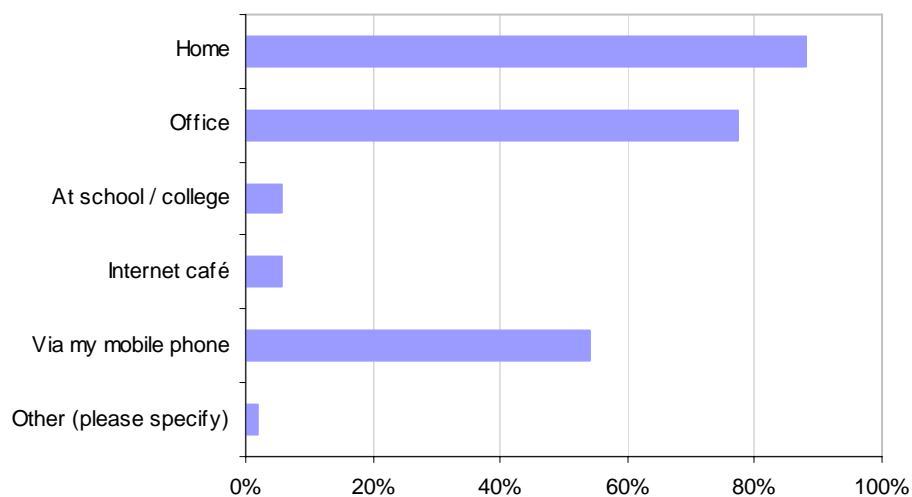


Chart 13 - What locations do you most often tweet from?

Tweeting from work

When asked what time during the day they tweeted most often, 69% of the overall survey said that they most often used Twitter at work. Of those calling themselves employed or self-employed, 88% admitted tweeting most often from the office. 77% of employed or self-employed respondents tweet often 'at work'.

WHEN DO YOU NORMALLY TWEET THE MOST?

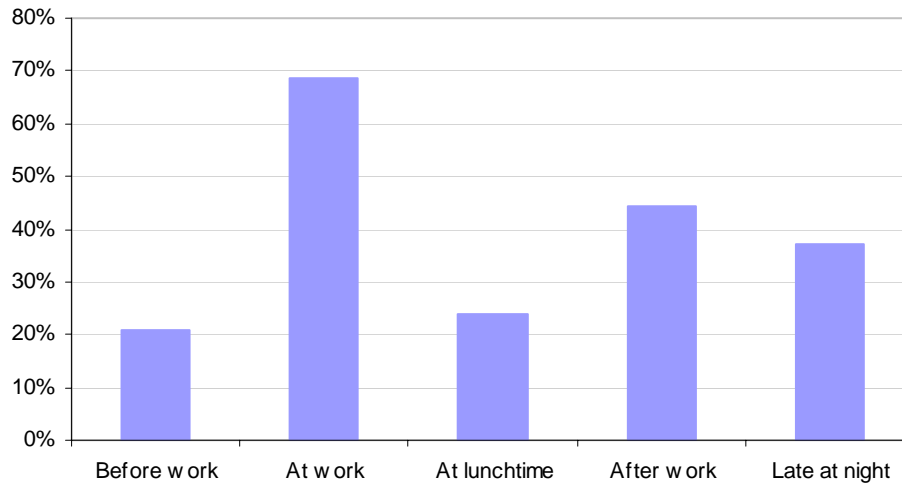


Chart 14

Tweeting habits

So how do Twitter users in the Middle East and North Africa tweet? What devices do they use to tweet? Why do they tweet and who do they tweet with? Here are few insights from the Twitter survey.

NOTEBOOK COMPUTERS ARE THE MOST POPULAR TWITTER DEVICES

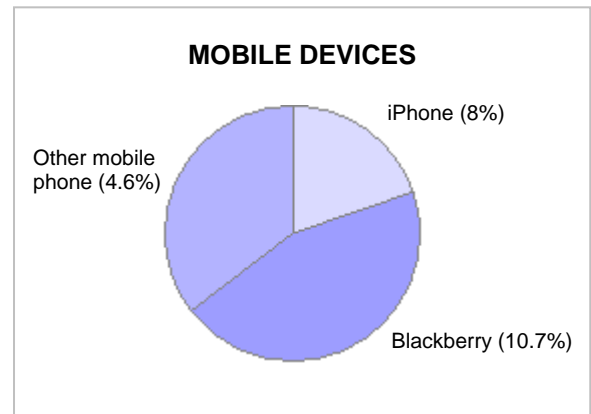
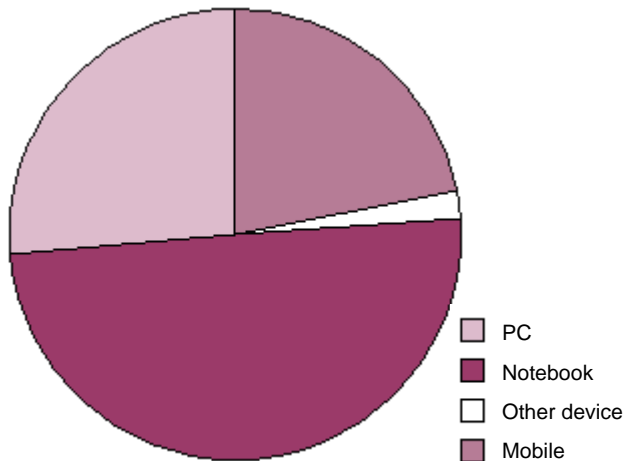


Chart 15 – What device do you use most often to access Twitter?

BLOGGERS ARE POPULAR WITH MENA TWITTER USERS!

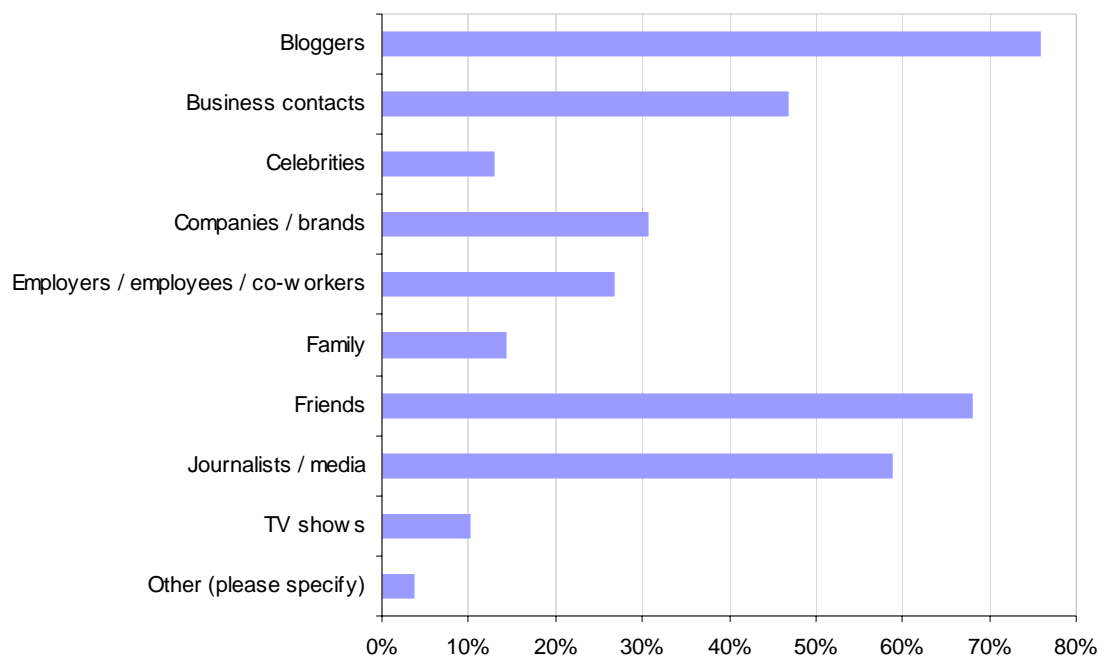


Chart 16 – Who do you interact with most often via Twitter?

26% TWEET IN ARABIC (OR 50% OF THE ARABIC SPEAKERS SURVEYED)

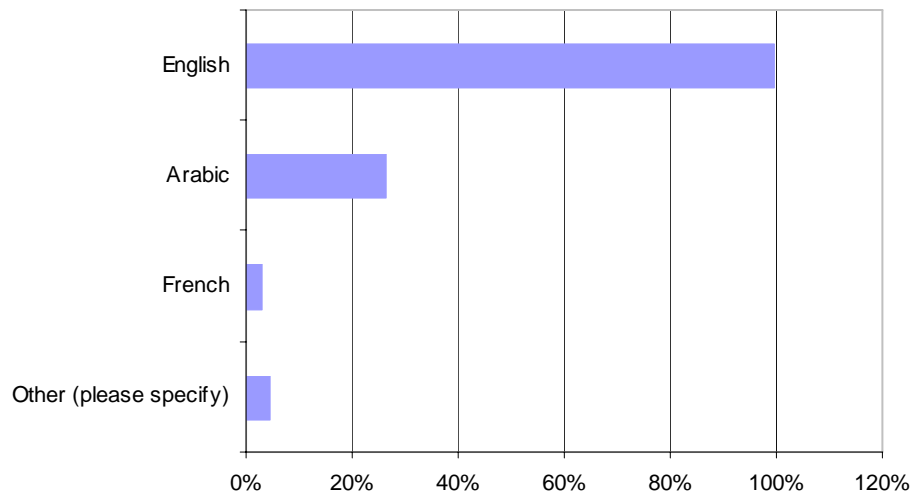


Chart 17 – What language do you normally tweet in?

MENA TWITTER USERS VALUE TWITTER AS A SOURCE OF INFORMATION

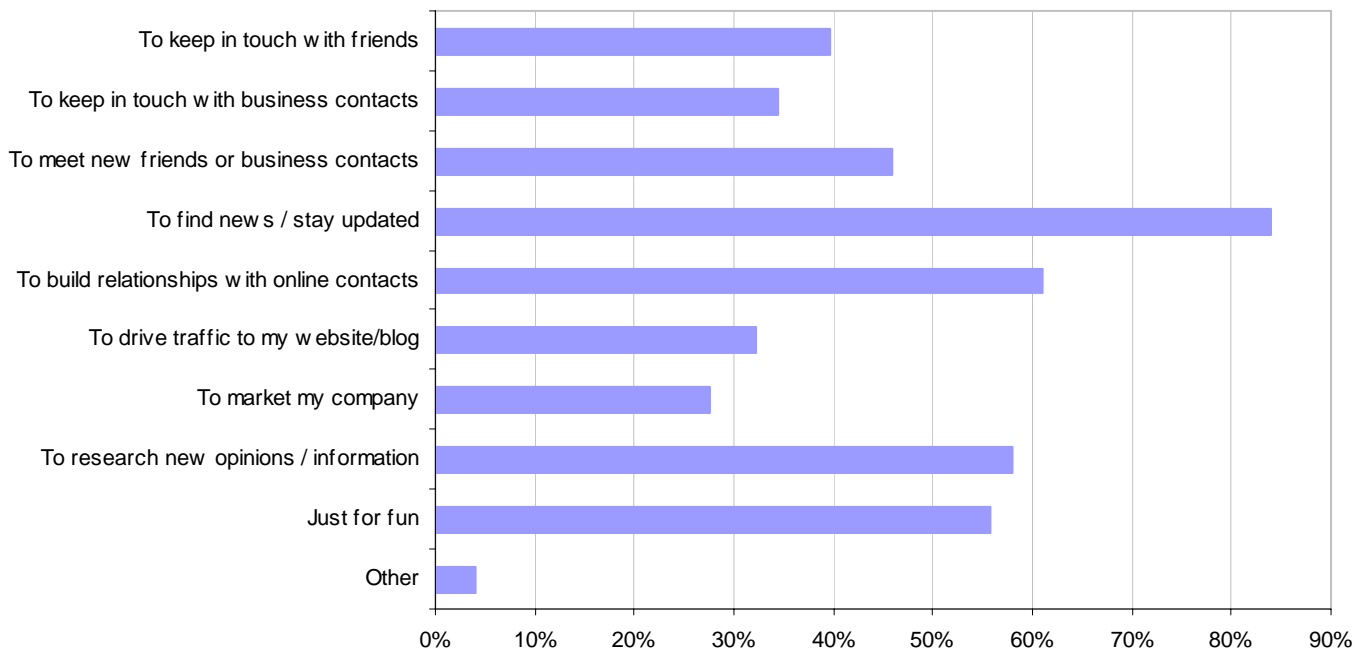
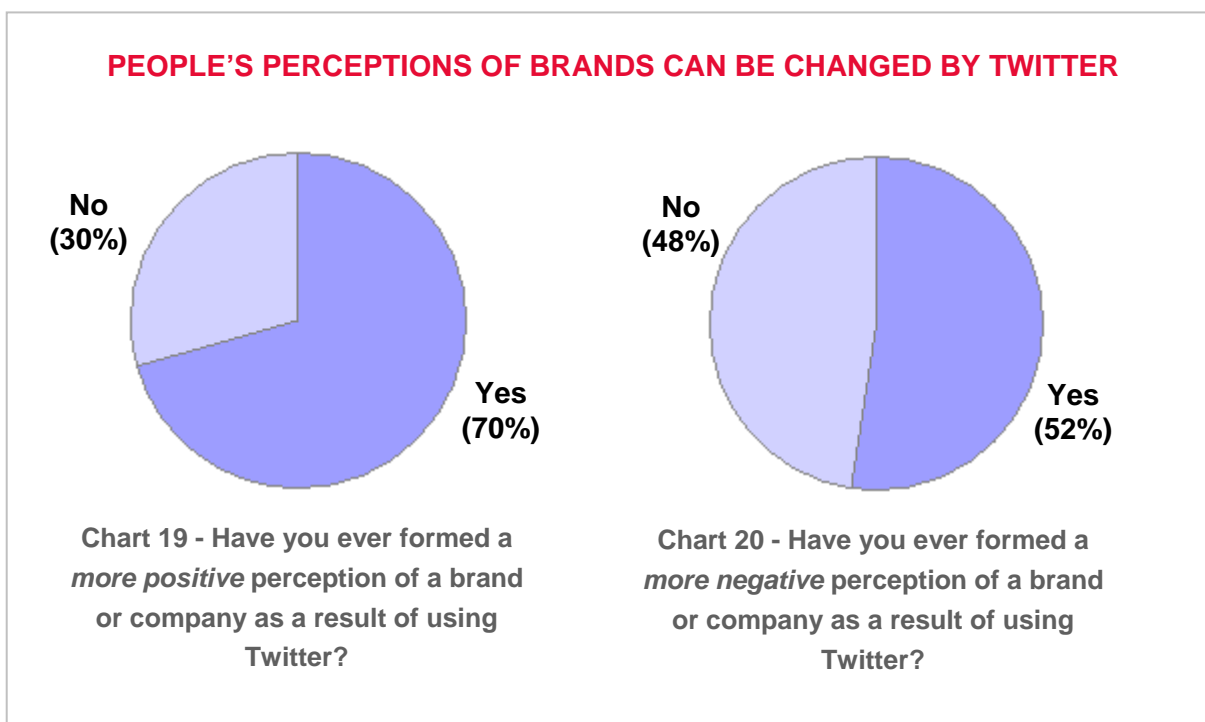


Chart 18 – What purpose do you normally use Twitter for?

Perceptions & reputation

It's no secret that the Internet is becoming more and more important to reputation management, even though relatively few companies try to systematically manage their online reputation. More than half of those who took part in our survey admitted that Twitter had affected their perceptions of people and / or brands, which may be particularly significant given that there are relatively few brands represented across the Middle East and North Africa's Twitter communities. 15% of respondents to our survey were public relations professionals, highlighting PR's increasing interest in the Twitter platform.



Whilst only 31% ranked companies or brands among those they interacted with most often, 61% said that Twitter has affected their perception of a brand or company. As a result, one could argue that Twitter can play a significant role in shaping perceptions about brands or companies and that the interactions involved in shaping brand perceptions are more personal networking interactions than interactions directly with brands represented on Twitter. However, since the most popular time for people to use Twitter was whilst *at work* (69% in our survey) and one can not assume effect of Twitter on reputation is purely on a consumer level either. If Twitter is helping to shape people's brands perceptions, positively or negatively, there is every reason for companies to take Twitter seriously and ensure that they are taking part in the conversation in some way.

Products & marketing

Important to all marketers looking at Twitter as a potential communications and marketing tool is whether it reaches an audience worth targeting. Today, Twitter adoption across the Middle East and North Africa is principally in the early adopter stage, lacking in scale and missing some key demographics for marketers. However, to leave our conclusions at that would be to judge Twitter a little too harshly. It may well be that Twitter's influence across MENA via its early adopter community of power-users is actually quite substantial.

A small, but influential crowd

Twitter's benefits do seem to resonate with those that have a particular interest in sourcing or producing content, an assertion borne out by the number of bloggers, journalists, advertising, marketing, media and public relations people on Twitter, making MENA's Twitter community an influential crowd. Many MENA Twitter users, both consuming and sharing content via their tweets, are actively involved in content creation or content distribution, either by virtue of their profession or via blogs and other social media platforms. 76% of respondents to our survey said they interacted often with bloggers and 59% with journalists, whilst 65% were contributors to a blog themselves. 'Traditional media' houses on Twitter from the MENA region alone reach an audience of millions and Twitter has become a source of stories for many, although perhaps weighted towards technology and Internet stories. However, there are also social media content producers and distributors to take account of. Most Twitter users surveyed also use Facebook, a social media platform with millions of users across MENA and Twitter's 140 character messages are quite often duplicated or re-distributed via Facebook.

PR, MEDIA & MARKETING ACCOUNTED FOR 35% OF RESPONDENTS

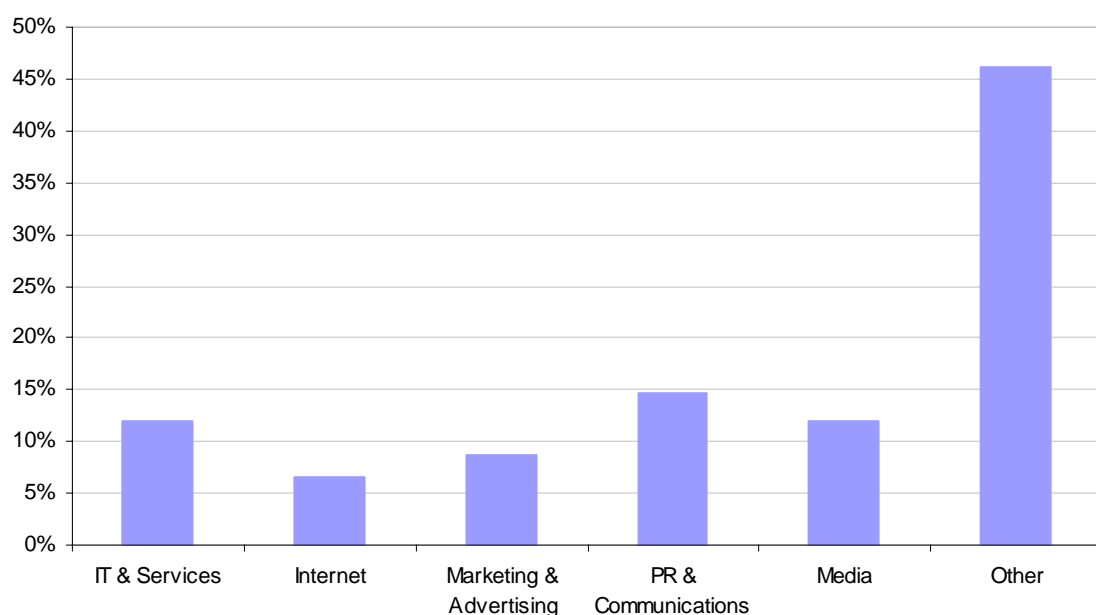


Chart 21 – What industry do you work in?

People do make purchases as a result of Twitter usage

Despite notable exceptions such as Dell, that has famously attributed 3 million US dollars of sales to its Twitter activities, there is an almost total lack of e-commerce on Twitter globally. In its early stage of development, the MENA Twitter community has a very low adoption of Twitter by brands and an even lower level serious efforts to include Twitter in advertising and marketing campaigns. However, the survey found that 70% of MENA Twitter users have recommended a product or service to other users, while 91% admit to having found out about a new product or service via Twitter. Perhaps surprisingly, 32% also state that they have bought a product or service as a result of using Twitter.

32% HAVE PURCHASED A PRODUCT OR SERVICE DUE TO TWITTER

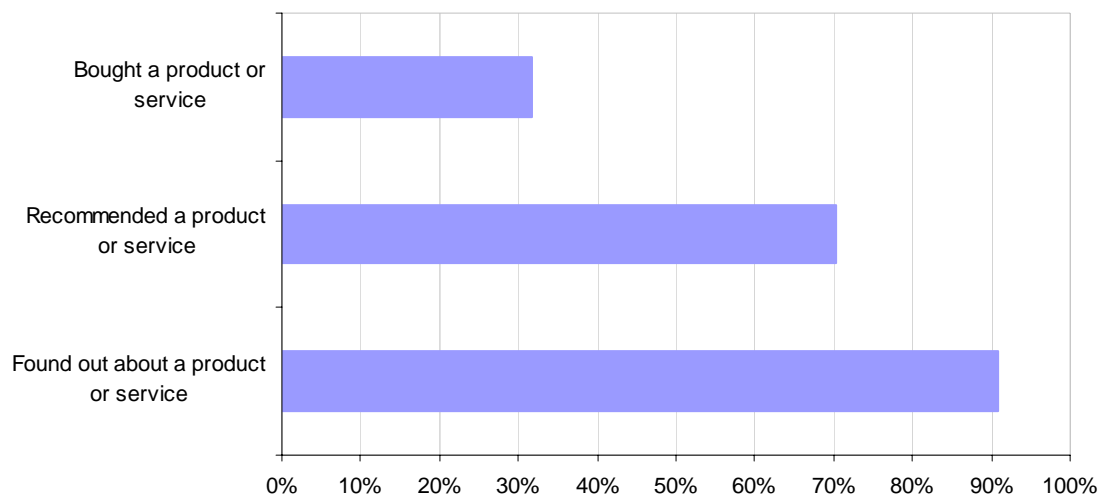


Chart 22 – Respondents that have found out about, recommended or purchased a product or service “as a result of Twitter”

Despite the high instance of sharing information and recommendations about products and services, only 26% of our survey saw marketing their company as one of their core uses for Twitter. However, since many Twitter users tweet often ‘at work’ and there is a clear business networking value for many using Twitter in the region, its logical to assume that users may be ideally located to share news and recommendations with their organisations and work colleagues.

Media & news

Twitter's role as a news distribution channel has been much heralded in the media this year and our survey confirmed that the most popular reason for using Twitter was to find news and stay updated. However, as noted previously, many of the consumers of news and other articles via Twitter are also content producers in their own right. Topical news stories, blog posts and gossip is circulated as much among journalists, bloggers, writers and media workers as among non-content producing consumers. This doesn't always mean that Twitter surfaces the news, but it does mean that news and news story leads can travel very fast.

TWITTER'S IMPACT ON MEDIA & NEWS

- 59% interact often with journalists or media contacts
- 76% interact often with bloggers
- 85% use Twitter to find news or stay updated
- 55% use Twitter to research new opinions or information
- 12% of respondents worked in media
- 65% of respondents were bloggers
- 34% of respondents use Twitter to drive traffic to their blogs

Table 2

So, what happen to news up-dates on Twitter? Is Twitter taking eyeballs away from traditional media or directing them straight back to traditional media? Perhaps predictably, the survey found that news links were popular, however it also found that television in particular benefited from Twitter referrals.

38% HAVE TUNED INTO A TV PROGRAM THEY HEARD ABOUT ON TWITTER

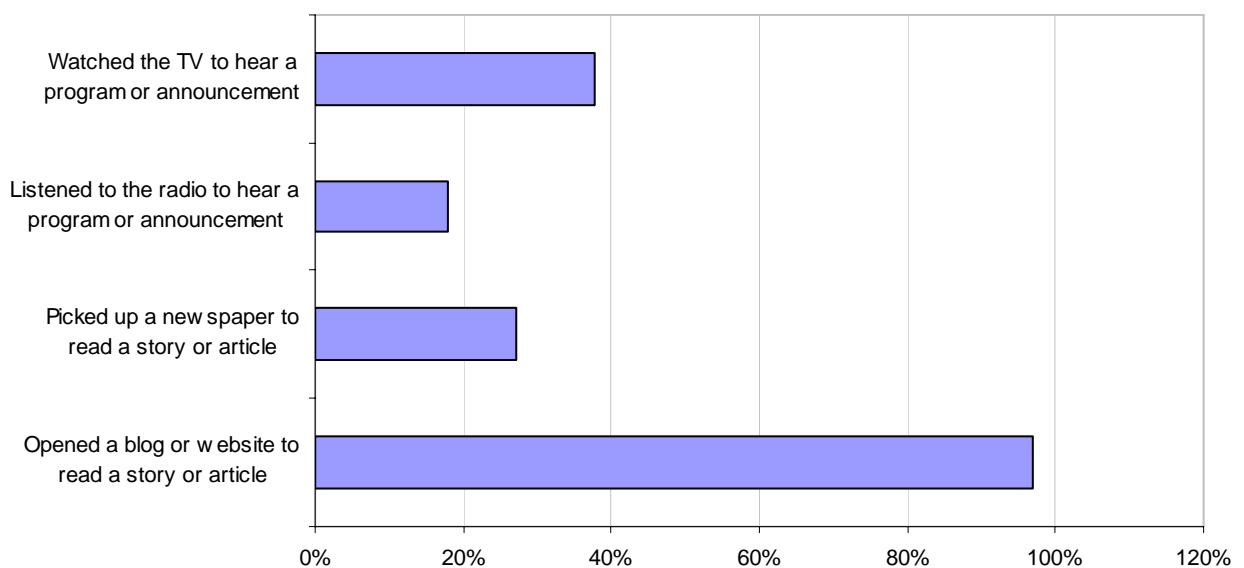


Chart 23 - Have you ever responded to news, links or tweets you've seen on Twitter in any of the following ways?

Twitter & social media

Consistent with the contention that the MENA Twitter community is in its early adopter phase and populated with a large percentage of social media power users, the MENA Twitter Habits survey found that most Twitter users were also users of other social media. According to a recent study of social media users in the USA by BIGresearch 73% of Twitter users also use Facebook. More than 90% of MENA Twitter users surveyed were Facebook users, while 76% were also users of business networking website LinkedIn. Friendfeed (21%), MySpace (15%) and Xing (14%) were the next most popular social media sites in our survey

91% OF TWITTER USERS SURVEYED ALSO USE FACEBOOK

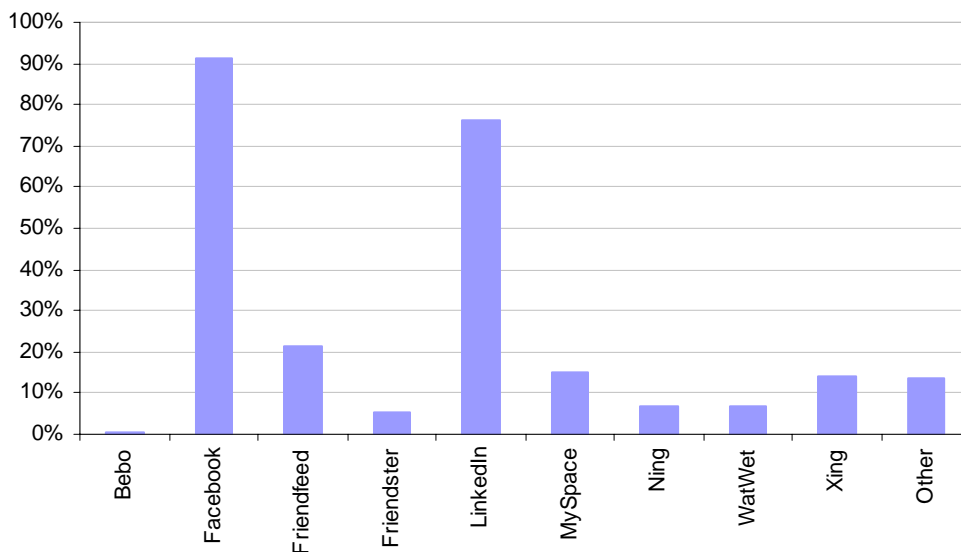


Chart 24

To better understand how Twitter users viewed Facebook and if Twitter usage affected Facebook usage, survey respondents were asked which service they currently use more. The survey found that roughly 50% of respondents used Facebook more than Twitter and roughly 50% used Twitter more than Facebook.

48% OF FACEBOOK USERS ALREADY USE TWITTER MORE THAN FACEBOOK

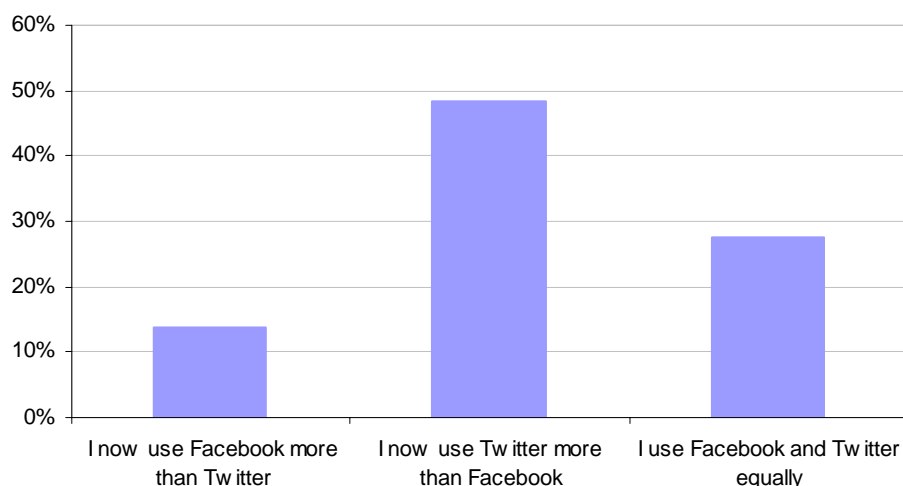


Chart 25

Are Twitter users going to use Facebook less in future?

When respondents were asked which service they expected to use more in future, about half said that they expected to use Twitter more than Facebook. However, only 12% expected to use Facebook more than Twitter in the future.

48% OF FACEBOOK USERS EXPECT TO USE TWITTER MORE IN FUTURE

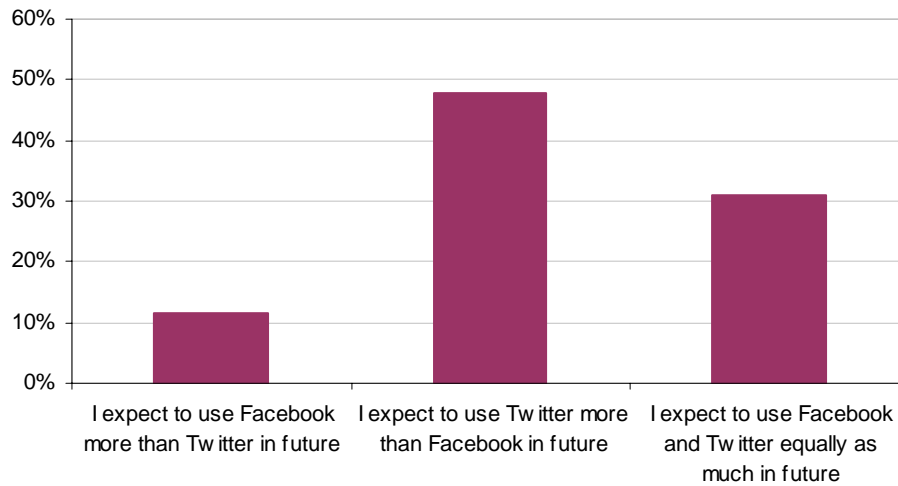


Chart 26 – Respondents that used by Facebook and Twitter were asked which platform they expected to use more in the future.

Methodology

Spot On Public Relations invited more than 600 Twitter users across the Middle East and Africa to take part in a Twitter habits survey in early August 2009. 270 respondents opted to take part in the survey, of which 216 completed the entire questionnaire and were based in the Middle East and North Africa region. All facts, figures and statistics come from data submitted by responders to the survey questionnaire except over all MENA Twitter community statistics, growth statistics and statistics attributed to other sources. Overall statistics for registered Twitter users in the Middle East and North Africa and user growth statistics come from Spot On's monthly survey of MENA twitter users accessed and counted using third party applications.

Spot On Public Relations

[Spot On Public Relations](#) is an integrated communications firm that works with organisations to create clear and differentiated positioning, build clear propositions and help them to engage effectively with the people they want to talk to.

Spot On Public Relations is the Middle East network partner of [Brodeur Partners](#) and a founder member of the [Middle East Public Relations Association \(MEPRA\)](#).

Our services

With a 15-year track record of managing communications for international companies, government entities and NGOs in the Middle East, Spot On offers strategic counsel, strong market experience and a strong track record of achievements.

The firm offers a broad range of services including corporate communications, event management, executive platform development, media relations, marketing communications, online communications and public affairs.

Spot On's clients include IBM, Lenovo, Oki and Virgin Megastore Middle East.

Spot On & social media

Spot On Public Relations has a long and close relationship with the Internet in the Middle East since it first became available in the Middle East region in 1994, from working with key Internet proponents in the region such as Cisco Systems, Intel, Novell and Microsoft to build and execute early Internet adoption and market awareness campaigns through to its own history of using Internet technologies in its business. Already a recognised thought leader in the social media space, Spot On has a wide base of social media connections and is an active social media user across many platforms. We have the T-Shirt.

Spot On is a strong advocate of blogging, social networking and social media marketing in the Middle East. In recognition of the wide variety of challenges and opportunities that new media opens up for clients, Spot On supports an extended digital offering through its network of over 20 specialised regional and global digital marketing companies.

Contact us

Spot On Public Relations

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References

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