

Understanding Emerging Social Media Platforms in Qatar

Research Summary, December 2014

Abstract

The impact of social media on the global communications landscape over the past decade has been profound. Social media has not just changed *what we do*, but also *how we do it*.

There are now over 3 billion Internet users and 2 billion social media users; with 1.6 billion active mobile social accounts. As smartphone adoption continues to grow, we can expect to see an even greater convergence between these three indices.

The Middle East has also seen the impact of this evolution in communication, although much of the existing research in this space has tended to focus on take-up of social networks, without examining the reasons for this growth or the impact of evolving consumer behaviors.

It is these elements which we have sought to explore in this study; by learning not just *what* social media people in Qatar use, but also *how and why* they use it.

This includes analysis of eight different social media services; ranging from older more established networks like Facebook, Instagram and Twitter to newer entrants like and Snapchat, WhatsApp and Path – none of which have ever been covered in previous research within Qatar.

As a result, this report provides unique insights into how Qatar uses social media at the end of 2014.

A full report with more detailed conclusions from this study will be published in early 2015.

Top Ten Findings

1. WhatsApp is the most used social media service in Qatar.

This messaging app is used by 87% of survey respondents. It also has the highest awareness rating (96%) of the eight services we asked users about.

2. Awareness of social networks is highest amongst Qataris and non-Qatari females.

Women in Qatar are more aware of services like BBM (+10%) and Snapchat (+12%) than men. Qataris are more likely to have heard of networks like Snapchat (77% vs. 39%) and Instagram (97% vs. 65%).

3. Although 90% of Qataris are aware of Facebook, only 44% use it. This is compared to 94% vs. 84% for non-Qataris.

Facebook is the fifth most popular social network for Qataris, but second for non-Qataris.

4. Facebook and WhatsApp are the top platforms for all 14 activity areas we examined.

Activity areas included sharing photos and videos, meeting new people, asking questions, as well as sharing views and opinions.

5. Non-Qataris tend to share photos on Facebook. Qataris don't.

46% of non-Qatari males and 49% of non-Qatari females reported posting pictures on Facebook, whereas only 12% of Qatari males and 6% of Qatari females share photos on the social network.

6. Being "mobile friendly" is a key driver for usage for over 50% of social media users and 70% of Qataris. 20% of users would consider leaving a network "if it is not mobile friendly."

This sentiment was especially high among Qatari women, 77% of whom identified the importance of this.

7. "Boredom" is potentially the top trigger for social media churn among women.

49% of Qatari women in our survey, claimed this, along with 35% of non-Qatari women.

8. 85% felt that social media is "helping to spread rumors and false information."

This was the most negative aspect of social media identified by our study, irrespective of age, nationality or gender.

9. Privacy concerns appear to be less of an issue than we expected.

Only 31% of users stated "it has enough privacy concerns" was a consideration before deciding to use a new network. "Growing privacy concerns" was identified by only 23% as a reason for leaving a service.

10. Social network users in Qatar tend to be "lurkers" more than active participants.

Across all networks, only two-thirds post status updates, and just over half "ask questions of others" on different social media platforms. However, 77% of users harness social media to find out the latest news, and 73% use these channels to see what others are saying.

1. Usage of social networks

Key insights:

- **Awareness and usage of social networks in Qatar are both high.**
Amongst Internet users, over half have heard of WhatsApp, Facebook, Twitter, BBM and Instagram; with WhatsApp and Facebook being used by over 80% of them.
- **WhatsApp is the leading social platform: 96% of users have heard of it; 87% use it.**
- **Qataris are much more aware of newer social networks than non-Qataris.**
With the exception of WhatsApp (98% vs. 97%), Qataris are much more likely to have heard of newer social networks like Snapchat (77% vs. 44%) and Instagram (87% vs. 63%). Even Path, which is still a small and relatively niche network, had been heard of by a quarter of Qataris (25% vs. 11%).
- **Awareness does not necessarily translate into usage.**
57% of female respondents had heard of Snapchat, for example, although only 15% used it. In contrast, just 45% of males had heard of Snapchat, but usage levels were almost identical (14%).

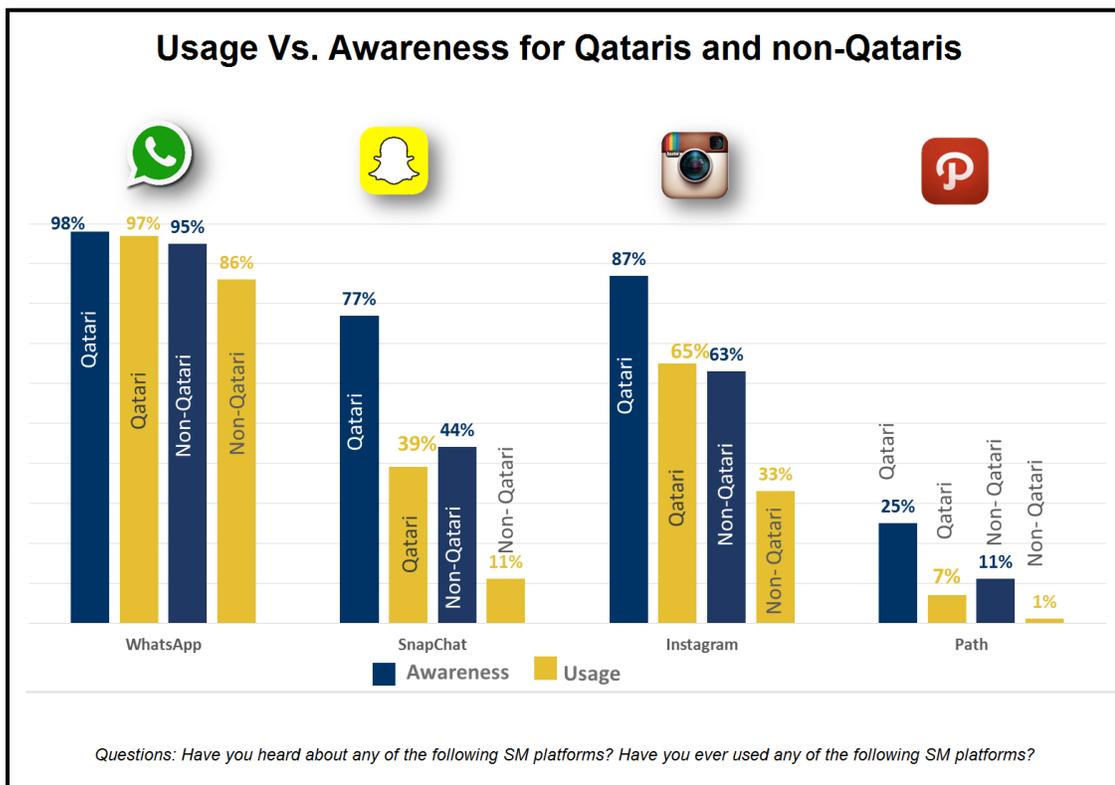


Figure 1: Usage Vs. awareness of newer social networks – Qataris Vs. non-Qataris

2. Activities

Key insights:

- **Facebook and WhatsApp were the top platforms for all 14 activity areas we asked about.** This included sharing photos and videos, meeting new people, asking questions, as well as being the environment in which people were most likely to share their views and opinions online.
- **Qataris are more likely to use WhatsApp, Twitter and even Instagram to find out about the latest news. Non-Qataris are much more likely to use Facebook.** 52% of expats, use Facebook to find about the news, compared to 12% of Qataris. Over a third (34%) of Qataris use WhatsApp for this purpose (compared to 21% of non-Qataris). 25% of Qataris also use Twitter (Vs.12% of expats).
- **Non-Qataris tend to share photos on Facebook. Qataris are more likely to share photos on WhatsApp, Snapchat and Instagram.** Only 8% of Qatari males use Instagram for photo sharing, compared to 31% of females.

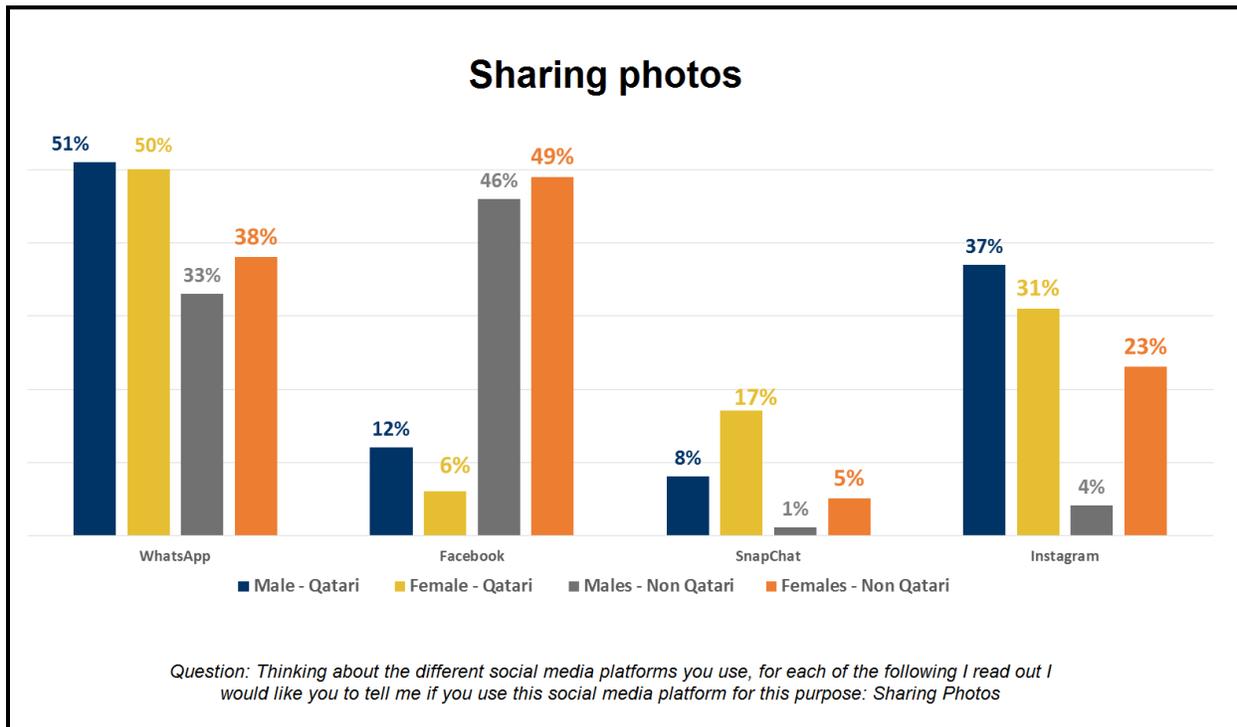


Figure 2: Sharing photos: Qatari males vs. non - Qatari males / Qatari females vs. non-Qatari females

3. Drivers and motivations

Key insights:

- **“Mobile friendly” was a driver for use for over half of our sample and 70% of Qataris.** Moreover, 20% of users would consider leaving a network “if it is not mobile friendly.”
- **Changes in features and design are not a big driver for churn.** But over a fifth of respondents would consider leaving a network if it was “too time consuming.”
- **“Boredom” is potentially the top trigger for social media churn among women.** 49% of Qatari women in our survey claimed this; along with 35% of non-Qatari women.

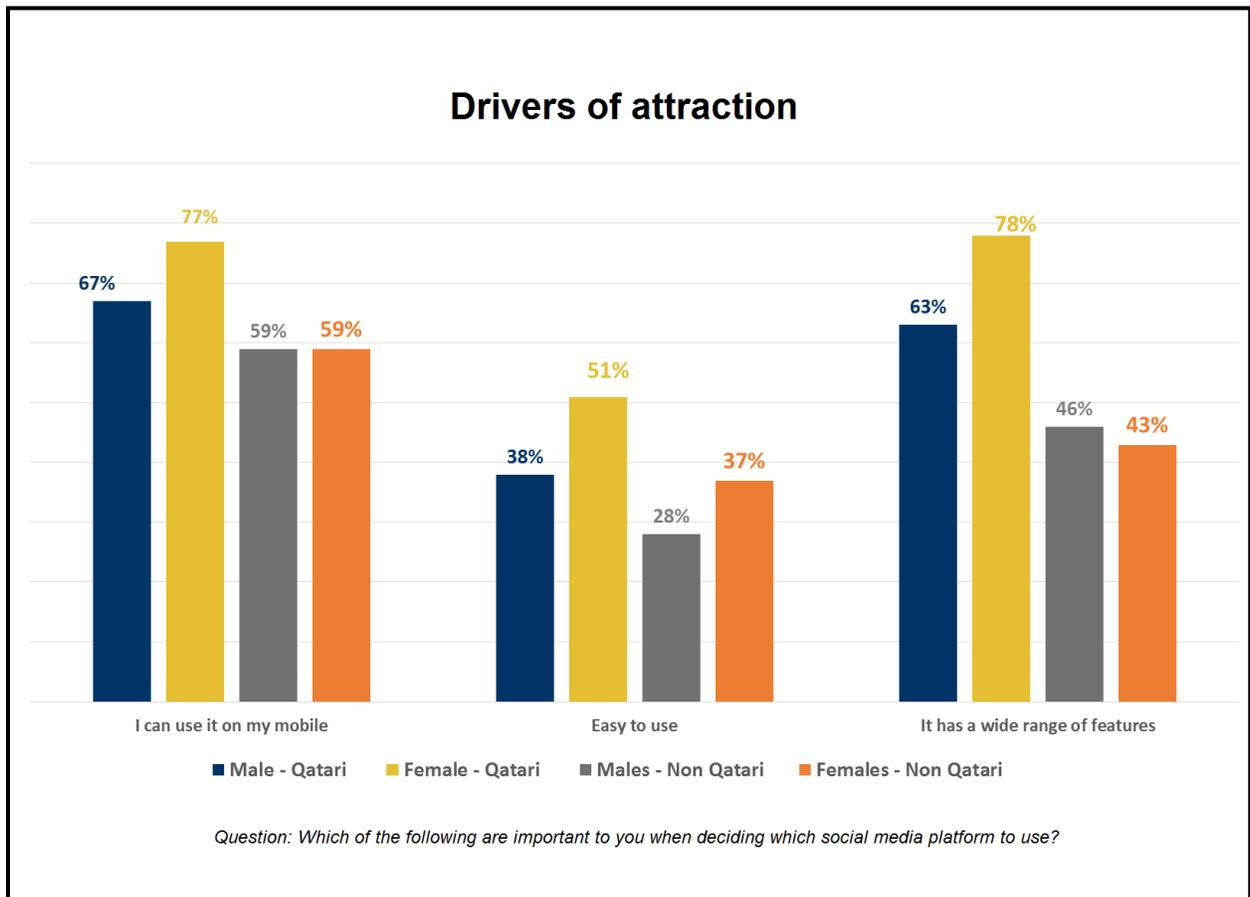


Figure 3: Drivers of attraction when choosing to use a social media network: Qatari males vs. non - Qatari males / Qatari females vs. non-Qatari females

4. User concerns and societal impact

Key insights:

- **85% felt that social media is “helping to spread rumors and false information.”**
This was the most negative aspect of social media identified by our study. We saw little variance towards this issue across different demographics.
- **Over three-quarters feel that social media “takes away from quality time with the family.”**
68% of our sample group also felt that it was intruding on people’s private life. Meanwhile, 65% expressed the view that social media is “leading to a wider generation gap.”
- **Fake names are one way in which multiple users overcome privacy concerns.**

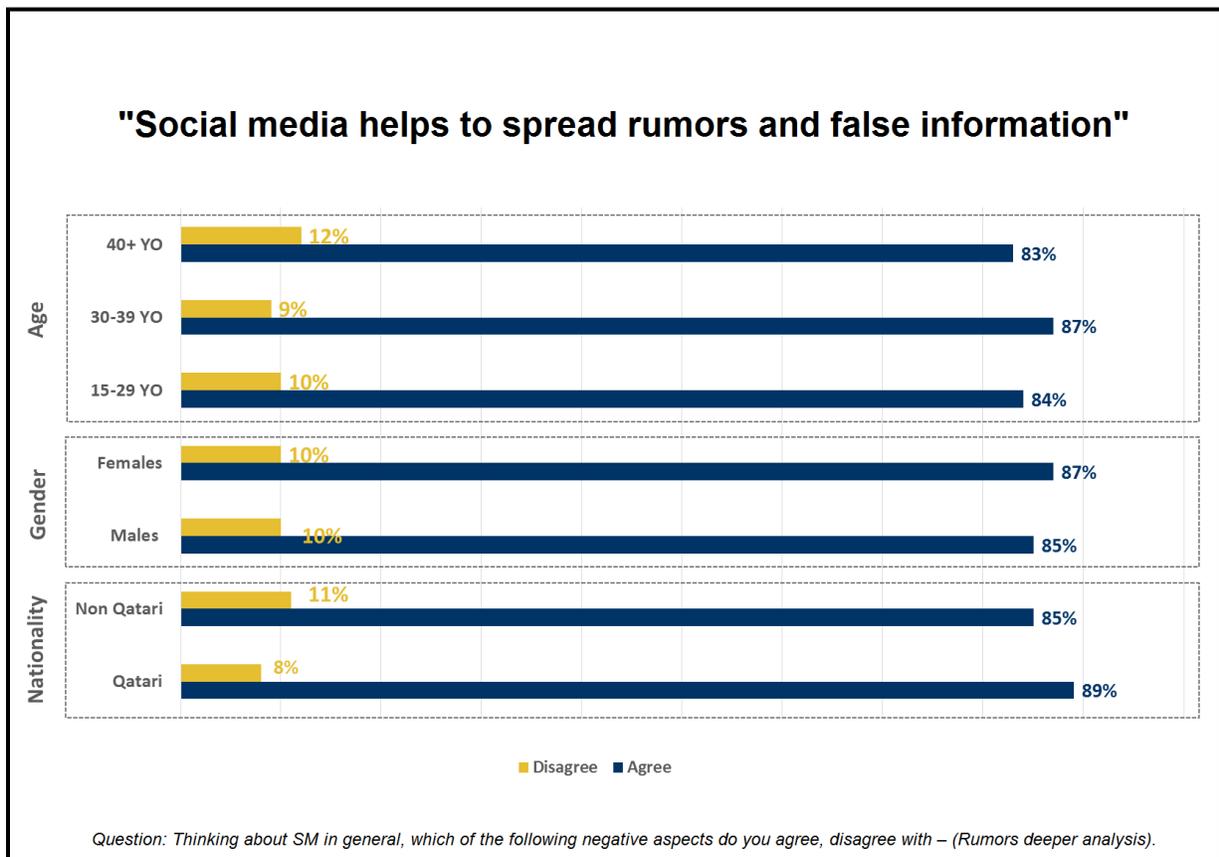


Figure 4: Social media helps to spread rumors analysis: Qataris Vs. non-Qataris/ Males Vs. Females/ Age ranges

Methodology

The Ministry of Information and Communications Technology (ictQATAR) commissioned Ipsos MENA to conduct the fieldwork for this study, as part of their Rassed research program. Data collection from a sample of 1,000 adults was conducted using Computer Assisted Telephonic Interviews (CATI) between 1st September 2014 and October 16th 2014. For more information please contact Ipsos Qatar. Tel: +974 4401 0666. Email: admin.qatar@ipsos.com

Please visit the Rassed website for details of other research initiatives: www.ictqatar.qa/en/rassed/