UNDERSTANDING EMERGING SOCIAL MEDIA PLATFORMS IN QATAR
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Rassed
Exploring Digital Impacts on Society

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The Digital Society Department at the Ministry of Information and Communication Technology (ictQATAR) established Rassed to study the effects of the Internet and Information Communication Technologies (ICT) on society; and the potential of emerging digital technologies.

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The impact of social media on the global communications landscape over the past decade has been profound. During that time, social networks have become mainstream, as social channels have grown from nascent services to media behemoths.¹

New global and niche networks² have emerged, and with it changes in our behavior and language. From taking “selfies” - an activity understood, and engaged in, by young children as well as teens and adults - through to emerging concepts like “oversharing” and “FOMO” (Fear of Missing Out)³ social media has not just changed what we do, but also how we do it.

This dramatic growth – and its associated social and behavioral impacts - has been driven by a number of factors, including the emergence of smartphones and the growth of Internet usage around the globe.

There are now over 3 billion Internet users⁴ and 2 billion social media users⁵ with 1.6 billion active mobile social accounts⁶. And as smartphone adoption continues to grow, we can expect to see an even greater convergence between these three indices.

For many people, especially younger audiences, the Internet and Social Media will increasingly be synonymous. This is a generation who cannot remember life without social networks and the opportunities afforded by “always on” connectivity.

The Middle East has also seen the impact of this evolution in communication. As elsewhere, social media in the Middle East and North Africa (MENA) is used for a wide range of purposes; from information gathering and entertainment, through to e-Commerce activities and different forms of creative expression.

This growth has been charted in research reports by Qatar’s Ministry of Information and Communications Technology (ictQATAR)⁷, the Dubai School of Government⁸, and others; including analysis of some of the different niches social channels support as a source for breaking news⁹ and entertainment¹⁰.

Much of the existing research in this space has typically focused on take-up of social networks, without examining the reasons for this growth or the impact of evolving consumer behaviors.

The latter is important because businesses, brands and governments continually need to understand the best way to engage their target audiences. Moreover, social media is a notoriously fickle space, so the need to keep abreast of changing behaviors is constant.

It is these gaps 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 how 1,000 people in Qatar (500 Qataris and 500 non-Qataris) use eight different social media services. These ranged from older more established networks like Facebook, Instagram and Twitter through to newer entrants like and Snapchat, WhatsApp and Path – none of which have been previously studied in Qatar.

As a result, this report provides a unique in-depth insight into how and why Qatar uses social media.

We hope you find our research conclusions as useful, and thought-provoking, as we do.
This new report allows us to understand social media usage in Qatar as never before. Here are ten of the most striking conclusions, which caught our eye:

**01**
**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.

**02**
**Awareness of social networks is highest among Qatars.**
Qatars are more likely to have heard of – and used - networks like Snapchat (77% vs. 39%) and Instagram (97% vs. 65%).

**03**
**Although 90% of Qatars are aware of Facebook, only 44% use it. This is compared to 94% vs. 84% for Non-Qatars.**
Facebook is the fifth most popular social network for Qatars, but second for non-Qatars.

**04**
**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.

**05**
**Non-Qatars tend to share photos on Facebook. Qatars don’t.**
46% of non-Qatri 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.
Being “mobile friendly” is a key driver for usage for over 50% 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.

“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.

85% felt that the 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.

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.

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.
Awareness and usage of social networks in Qatar are both high. Among Internet users, over half have heard of WhatsApp, Facebook, Twitter, BBM and Instagram; with WhatsApp and Facebook being used by over 80% of the aggregated Internet population.

Qataris have a higher awareness than other groups of different social networks. This includes established services like BBM and Instagram; and emerging channels like Snapchat (77% versus 47% for the total Internet population) and Path (25% versus 12%).

Females are the most aware of different social networks. Women in Qatar are significantly more aware of Twitter (+6%), BBM (+10%) and Snapchat (+12%) and other social networks, than men.

Awareness does not necessarily translate into usage. 57% of female respondents had heard of Snapchat, for example, but only 15% used it. In contrast, just 45% of males had heard of Snapchat but usage levels (14%) were almost identical.

There are gender differences in social network usage. Despite lower awareness levels, more men than women in Qatar use Facebook, Twitter, BBM and Forums. Women, in contrast, are more likely than men to use Instagram, Path and WhatsApp.
In this opening section, we explore questions related to awareness and usage of social networks in Qatar. For many of these social channels, our research represents the first time their usage in Qatar has ever been studied.

Alongside this, our conclusions go beyond headline take-up statistics to also explore differences across nationalities and age groups; as well as male and female users.

In a further departure from previous research in this space\textsuperscript{11}, we also report on the volume of usage across particular networks, digging a little deeper than most studies, which typically aggregate social media use. Not surprisingly, in doing this, we learned that there are differences in social media usage across these diverse clusters. However, we also found some surprising areas of commonality too.

1.1 Usage versus awareness

We asked 1,000 social media users in Qatar a range of questions about eight different social networks. This included traditional social media services (Facebook, Twitter, Instagram and Path), social messaging services (WhatsApp, Snapchat and BBM) as well as first generation social networks (online forums).

In the first instance, we wanted to ascertain if there was a correlation between awareness of services and their usage; alongside understanding if there were any differences in this space between nationalities.

Our analysis showed that:
WhatsApp is the leading social platform: 96% of users have heard of it, and 87% use it.

Qataris are much more aware of newer social networks than non-Qataris.
With the exception of WhatsApp (98% versus 97%), Qataris are much more likely to have heard of newer social networks like Snapchat (77% versus 39%) and Instagram (97% versus 65%). Even Path, which is still a small and relatively niche network, had been heard of by a quarter of Qataris (25% versus 7%).

Qataris are also more likely to use these emerging networks.
44% of Qataris use Snapchat, compared to 11% of non-Qataris; whilst 65% of Qataris use Instagram, an adoption figure which is 30% higher than the take-up rate (33%) for non-Qataris.
**Figure 1: Usage versus awareness of social networks across total internet population.**

**Figure 2: Usage versus awareness of social networks across Qatars.**
1.2 “Heavy” versus “Light” users

To aid our analysis of social media usage we also asked respondents about the amount of time they spent each day on the eight different social channels covered in this study.

We subsequently split respondents into two groups: “heavy” users – social networkers who use a given social network for 3 hours or more a day; and “light” users – those who are on a particular platform for under 3 hours each day (see Figure 3).

People in Qatar spend an average of 2 hours a day on social media websites, according to the 2013 Arab Media Study by Northwestern University in Qatar; with some demographics spending even more time than this.

Key Insights:

The majority of social networkers are “light” users of particular networks.

Typically, three-quarters of users fell into this bracket, using a given social channel for less than 3 hours a day. However, their combined usage across all channels might exceed this amount.

But around 20% of our sample use any given single channel for more than 3 hours a day.

The heaviest users were found on Path (35% of Path users are on the network for over 3 hours every day) and BBM (30%). Twitter had the lowest percentage of heavy users, with just 14% of Qatar’s Twitterverse on the network for 3 hours or more on a daily basis.

Qatars are heavier users of WhatsApp and Instagram.

27% reported using WhatsApp for more than 3 hours a day (versus 22% of non-Qatars) and 29% claimed to be on Instagram for 3 hours or more a day (versus 20% for non-Qatars).

Non-Qatars are heavier users of BBM (31% versus 24%) and Snapchat (29% versus 22%).

They are also considerably heavier users of Path (48% versus 18%) even though this network has a higher adoption level amongst Qataris (7% versus 1%).

Qatars are typically lighter users of individual social networks, reflecting the fact that their social media usage is spread across a wider range of social media services than non-Qatars.
Heavy versus light use of social networks

**Total Population**

- WhatsApp: 22% (Heavy), 78% (Light)
- Facebook: 18% (Heavy), 82% (Light)
- Twitter: 14% (Heavy), 86% (Light)
- BBM: 30% (Heavy), 70% (Light)
- Snapchat: 27% (Heavy), 73% (Light)
- Instagram: 21% (Heavy), 79% (Light)
- Path: 35% (Heavy), 65% (Light)
- Forums: 6% (Heavy), 95% (Light)

**Qatars**

- WhatsApp: 27% (Heavy), 73% (Light)
- Facebook: 17% (Heavy), 84% (Light)
- Twitter: 15% (Heavy), 85% (Light)
- BBM: 24% (Heavy), 76% (Light)
- Snapchat: 22% (Heavy), 78% (Light)
- Instagram: 29% (Heavy), 71% (Light)
- Path: 18% (Heavy), 82% (Light)
- Forums: 8% (Heavy), 92% (Light)

**Non-Qatars**

- WhatsApp: 22% (Heavy), 78% (Light)
- Facebook: 18% (Heavy), 82% (Light)
- Twitter: 13% (Heavy), 87% (Light)
- BBM: 24% (Heavy), 76% (Light)
- Snapchat: 22% (Heavy), 78% (Light)
- Instagram: 29% (Heavy), 71% (Light)
- Path: 20% (Heavy), 80% (Light)
- Forums: 5% (Heavy), 95% (Light)

*Question*: On average, how long do you spend on each of the following social platforms that you usually use?

*Figure 3*: Heavy versus light users of social networks: Total population & Qatars versus Non-Qatars.
1.3 Evolving social media habits

Social media is a constantly evolving world. Networks can grow quickly; and just as quickly go out of fashion. Remember MySpace, Bebo, Orkut or Friendster?

To help us try and get a sense of how this dynamic may currently be evolving in Qatar, we explored changing social network usage by asking our sample which services they used more - or less - frequently than 12 months ago. By asking this (see Figure 4) we were able to ascertain that:

Key Insights:

**All networks have seen an increase in usage amongst some users.**

With WhatsApp (+44%), Instagram (+41%) and Snapchat (34%) all seeing significant gains. Nonetheless, all networks are also witnessing declines in usage among some of their users too; with WhatsApp (-17%) and Instagram (-18%) witnessing the smallest reductions.

Increased usage of Snapchat and BBM is balanced out by declining usage.

Both networks saw similar numbers claiming increased usage (34% and 33%) as numbers of users who said they were using the networks less (both 35%).

**Users of Twitter, Path and Forums tend to be using them less.**

Nearly half (48%) of Forum users stated their usage of these channels had decreased in the past 12 months; compared to just 16% claiming their usage had increased. Over a third - 37% - of Twitter users said they used the network less in the past year. 21% claimed the opposite.

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**Figure 4**: Platforms usage compared to last 12 months - more versus less
1.4 Newer networks versus older platforms

For the first time in Qatar, our study asked social media users about emerging social networks such as Snapchat, Instagram and Path. We benchmarked this against older, resilient, services like Facebook, Twitter and BBM.

First, we looked at older, more established networks (see Figure 5).

Key Insights:

**Facebook is more popular among non-Qataris.**

94% expressed an awareness of this social network, with 84% having used it. At 90%, awareness levels amongst Qataris were almost identical, but usage – at 44% - was almost half that of both awareness levels and the level of usage by non-Qataris.

**WhatsApp (97%), Instagram (65%), BBM (48%) and Twitter (46%) were all more popular.**

**Qataris are more aware of Twitter, BBM and forums.**

Moreover, they are more likely to use these platforms too. In particular, they are much more likely to use Twitter (46% versus 34%) and BBM (48% versus 26%) than non-Qataris.

**Over half of Qataris are aware of Qatar based online forums.**

Only 17% of Qataris use them, compared to a 58% awareness level. In contrast only 5% of non-Qataris use forums, mapped against an 18% awareness level. Usage of Forums by Qataris is akin to the awareness levels of Forums by non-Qataris.
In terms of newer networks (see Figure 6); our analysis showed that:

**Awareness - and usage - levels of WhatsApp is very high.**

98% of Qatari and 95% of non-Qatari had heard of this app. Usage stands at 97% of Qatari and 86% of non-Qatari. This is the highest of all social channels – new and old - covered in this study.

**Usage of Instagram among Qatari is higher than awareness and usage among non-Qatari.**

65% of Qatari use Instagram and 87% expressed awareness for this channel. In contrast, 63% of non-Qatari are aware of Instagram; and 33% of them use it.

**Usage of Snapchat by Qatari is also similar to awareness levels of this network for non-Qatari.**

44% of non-Qatari have heard of Snapchat, with just 11% of them claiming to use it; whereas 77% of Qatari have heard of the network; with 39% of them being Snapchatters.

![Bar chart showing usage and awareness of newer social media platforms](image)
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 sharing views and opinions.

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. However, 77% of users harness social media to find out the latest news and 73% use these channels to see what others are saying.

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 just 12% of Qataris. Over a third (34%) of Qataris use WhatsApp for this purpose too (compared to 21% of non-Qataris). 25% of Qataris also use Twitter (versus 12% for expats.)

Non-Qataris tend to share photos on Facebook.
46% of non-Qatari males versus 12% of Qatari males - and 49% of non-Qatari females versus 6% of Qatari females - share photos on Facebook.

Qataris are more likely to share photos on WhatsApp, Snapchat and Instagram.
Usage of WhatsApp and Instagram for this purpose is broadly similar for men and women. However, only 8% of Qatari males use Instagram for photo sharing, compared to 31% of females.

17% of social media users in Qatar harness these networks for e-commerce.
With Qataris and females being the most likely to do so.

Instagram is the leading social network for e-commerce among Qataris.
Whilst Facebook is the primary social network for e-Commerce for non-Qataris; with 8% using this network for this purpose, compared to just 2% of Qataris.
In this section, we explore the types of activities undertaken by social media users across different social networks.

As a whole, the most popular activities undertaken by social media users in Qatar are:

- “Sending messages to friends” (94%)
- “Sharing photos” (84%)
- “Finding friends or family you have lost touch with” (80%)

These results were not especially surprising. However, it was notable that “finding out the latest news” (77%) and “seeing what others are saying about current topics or issues” (73%) scored higher than “posting status updates about yourself” (68%) and “sharing the latest news or gossip from friends and family” (66%).

This suggests that social network users in Qatar tend to be “lurkers” – passive observers of online conversations - more than active participants.

To help us explore emerging social media behaviors, we also undertook a deeper-dive into three specific activity areas:

- Sharing Photos
- Finding out the latest news
- Online Shopping

These activity areas are not the most popular social media pastimes in Qatar, but newer networks are often focused on – or provide an increased opportunity - for such activities. The success of photo-based social networks like Instagram and Snapchat, for instance, is intrinsically linked to the rise of smartphones. Meanwhile, social channels are often cited by researchers and media groups as a contributor to the changing nature of news consumption being seen across the globe.

Moreover, as e-Commerce and m-Commerce become increasingly aligned, driven by the growth of smartphone ownership, so too we are seeing the rise of social networks as a direct tool for online shopping – or as a driver for real world retail.

As a result, we wanted to explore these emerging behaviors in more detail, discovering in the process considerable variances across different segments of Qatar’s social media population.

2.1 Sharing photos

Social networks have long been a repository for large numbers of photographs shared by their users. Back in 2008, Facebook announced that it had already published 10 billion images on the site. Fast-forward to September 2013, and the Business Insider website reported that both Facebook and Snapchat were seeing 350 million photos being uploaded to their respective websites every day. Given the growth curve in this space, it is likely that these numbers will have increased further still during the previous year.

In Qatar, 84% of respondents told us that they shared photos on social networks. After sending messages to friends (94%) this was the second most popular social networking activity revealed by our survey.

However, this overall figure masks a myriad of different uses (see Figure 7).
Key insights:

Gender variances were less pronounced than might otherwise be expected.
Instead, we found that differences tended to split more down lines of nationality.

Non-Qatari tend to share photos on Facebook. Qatari 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.

Qatari are more likely to share photos on WhatsApp, Snapchat and Instagram.
Qatari males use Instagram for photo sharing more than Snapchat (37% versus 8%).
Qatari women are bigger sharers on Instagram (31%) and Snapchat (31%).

WhatsApp is used at a very similar level by both Qatari males and females for photo sharing.

Instagram is also popular with non-Qatari women.
23% of whom post pictures on the network, compared to just 4% on non-Qatari men.

2.2 Finding out about latest news

Social networks across the globe have had a discernible impact on news consumption and publishing\textsuperscript{18}. For users benefits include real-time, instant updates of story developments; whilst publishers are increasingly attracting readers from a variety of different sources.

The impact of phenomena such as “social sharing” (the practice of sharing content from a website on a social media site or application)\textsuperscript{19} has seen services like Buzzfeed receiving more traffic referrals from Facebook shares than from Google searches\textsuperscript{20}. It is a trend that looks set to continue. In MENA, recent research\textsuperscript{21} from the AP found although TV remains the most popular source for breaking news; social networks came second, ahead of general online channels and other media outlets. Meanwhile the annual Arab Youth Survey observed\textsuperscript{22} that trust in social media as a news source is growing fast among Arab youth. Although TV remains, the most trusted source of news with this demographic, content shared through social media is quickly catching up, to the extent that it may overtake TV in 2015\textsuperscript{23}. 

\textbf{Figure 7: Sharing photos: Qatari males versus Non-Qatari males / Qatari females versus Non-Qatari females.}
As a result of these emerging behaviors, we asked if social media users in Qatar are following this trend (see Figure 8).

**Key Insights:**

Across Qatar, Facebook is the primary social channel for finding out the latest news. It is used by 48% of respondents, just under half of all social media users in Qatar. WhatsApp is the next most popular channel (38%) for this activity.

Only 13% of total respondents stated that they used Twitter for this purpose.

However, we did see substantial differences between different nationalities and gender.

Qatars are more likely to use WhatsApp (34% versus 21%), Twitter (25% versus 12%) and even Instagram (10% versus 5%) to find out about the latest news.

Non-Qatars are much more likely to use Facebook (52% versus just 12% of Qatars).

Women are more likely to use WhatsApp (33%) than men for newsgathering (19%).

Men are more likely to use Facebook (50% versus 42%). Usage of other channels is very similar.

![Finding out about latest news: Qatars versus Non-Qatars](image)

**Figure 8: Finding about latest news: Qatars versus Non-Qatars.**

### 2.3 Online Shopping

Use of social media for e-Commerce is still a relatively nascent concept in Qatar. However, it is a global trend that has emerged in recent years. It is also an area of social media activity that is expected increase, as brands build their presence on networks like Instagram and Snapchat; whilst at the same time these platforms seeks to monetize their offer.

Within Qatar, social media is also used as a means for “cash on delivery” e-Commerce. This works by users placing orders for goods via social channels, but still paying for their items in person - instead of via an e-Commerce platform like PayPal or PayFort. Understanding this phenomenon, as well as the wider interplay between social media and e-Commerce, can help inform policy and practice as Qatar seeks to develop this digital economy (see Figure 9).
Key insights:

Qataris and females are the most likely to use social media for e-Commerce purposes. Although it should be noted that only 17% of our full sample does so.

Instagram is the leading platform for online shopping among Qataris. 19% of Qatari’s use the photo sharing site for this purpose.

Facebook is the most popular e-Commerce platform for non-Qataris. Used by 8%, compared to just 2% of Qataris.

A third of Qataris females aged 15-39 use Instagram for e-Commerce. Compared to 21% of men.

Among Qataris aged 40+ Instagram is still used by one in five (20%) of Qatari women for e-commerce purchases.

**Figure 9: Online shopping: Qataris versus Non-Qataris / males versus females.**

**Figure 10: Instagram online shopping 15-29 versus 30-39 versus 40+ / males versus females.**
Key insights

Mobility is vital. Over half of our sample describe mobile friendliness as an essential driver for use. Rising to 70% of Qataris.

This is in line with wider developments described by the analysts Gartner as “the nexus of forces” manifest in “the convergence and mutual reinforcement of four interdependent trends: social interaction, mobility, cloud, and information.”

Similarly, 20% of users would consider leaving a network “if it is not mobile friendly.”

“Ease of use” was the third most popular driver, acknowledged by 47% of users.

This is especially important for Qatari women, 51% of whom identified this benefit.

78% of Qatari women look for social networks with “a wide range of features.”

Qatari men also highlighted this appeal (63%). For non-Qatars, this matters less. 46% of non-Qatari males and 43% of non-Qatari females agreed that this was an important consideration when considering usage of a social network.

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.

Qatari women, 49% of them in our survey, claimed this; along with 35% of non-Qatari women.
In this section we examine the reasons why people in Qatar use social networks.

Alongside this, we also examine the causes of social media churn – why it is that users leave social networks - or start to use them less.

These insights offer actionable intelligence for brands and other entities; as well as food for thought for anyone considering using social channels to support their work in Qatar.

Key attractions identified by our sample when deciding which networks to use include:

- “Most of my friends are on the same platform” (60%)
- “I can use it on my mobile” (53%)
- “Easy to use” (47%)

Privacy options, which we thought might be more of a consideration given the cultural context, were only identified as an issue by 31% of our total sample; although, as expected, there were variations across gender and nationality. We deliberate more on this topic in section 4.3.

3.1 Causes of attraction

The reasons why people begin and continue to use social networks varies depending on the individual. Not surprisingly, for most users, the primary reason for social network adoption is that “most of my friends are on the same platform.” 60% of respondents identified this driver.

However, this is not the only reason for social media usage (see Figure 11). Below are some other noteworthy motivations identified by our survey.

**Key Insights:**

**Over half our sample identified the importance of networks being mobile friendly.**

At 80%, Qatar - along with the UAE - has the highest penetration of smartphone penetration anywhere in the world\(^\text{31}\). Given this, isn’t not surprising that mobility matters.

When it came to leaving platforms “boredom” was an unexpected driver for many of our respondents. This trigger was especially prevalent for female social media networkers; and highest among Qatari women (49%).

Whether this boredom is with the network itself – or the content shared by their friends – remains to be seen. But given the fact that 78% of Qatari women also identified “it has a wide range of features” as a driver for adopting new social networks, this suggests that boredom may be caused by lack of features; or an over-familiarity with them.

Interesting, among Qatari women this was the highest ranked factor in deciding to use a social platform, just ahead of it being mobile friendly (77%). Both of these elements – wide range of features and being able to use the network via a mobile – were more important to Qatari women than ease of use, privacy options and the fact that most of their friends are on the same platform.

“Ease of use” was the third most popular driver, 47% highlighted this characteristic.

This was ahead of other considerations such as privacy options (31%) and being advert free (12%).

**Among different nationalities, “ease of use” matters more to women.**

51% of Qatari women (versus 38% of Qatari men) identified the value of this. For non-Qatars, this sentiment was expressed by 37% of women, related to 28% of non-Qatari males.
The mobile friendly nature of social networks is more important for Qataris.

70% of Qataris, compared to 53% of the total population, identified this as an important characteristic for social network use. Qatari women (77%) felt even more strongly on this issue (compared to 67% of Qatari men).

Qatari women are very interested in social networks which have “a wide range of features.” 78% highlighted this need, whereas only 22% of our total sample cited this trait. Qatari men also saw this as important (63%), where both male and female non-Qataris ranked this requirement lower (46% non-Qatari males, 43% among non-Qatari females).

3.2 Triggers to leave

After asking respondents about their general drivers for embracing particular social media networks, we then explored the factors which might encourage them to stop, or decrease, usage of these channels. Again the top answer, “if all my contacts move to a new social network,” was not a surprise. A third of respondents identified this as a potential reason to consider leaving a social network.

However, this answer was only just ahead of “boredom” - a driver for social media churn, which we had envisaged would rank much lower; perhaps behind privacy concerns, redesigns and intrusive advertising. As a result of this conclusion, we scrutinized this finding in more detail (see Figures 12 and 13).

Key Insights:

20% of users would consider leaving a network “if it is not mobile friendly.”

Given the importance that users attributed to networks being “mobile friendly” as a driver for take-up (see section 3.1) it was interesting to note that similarly this could also be a reason to move away from existing networks, as well as adopt new ones.

Changes in features and design are not a bigger driver for churn.

This was the lowest ranked (at just 8%) of the ten reasons we gave users to choose from (multiple answers were permitted) as a reason for potentially leaving a social network.

Over a fifth of respondents would consider leaving a network if it was “too time consuming.”

Given questions and concerns in the media about the potentially addictive nature of these channels, it was interesting to observe that 22% of our survey would consider taking matters into their own hands in this eventuality.
We also saw differences across gender and age ranges in this regard, although the top triggers for both genders are the same. Nonetheless, our research demonstrated some differences in the strength of feeling associated with these triggers.

**Key Insights:**

Woman are more likely to consider leaving social networks than men.

This gender led conclusion was present across the top four reasons for potentially leaving a social channel; and was found to be consistent across both Qatari and non-Qatari females.

“Boredom” is potentially the top trigger for social media churn among women.

49% of Qatari females stated this; and 35% of non-Qatari women surveyed. Among all Qatari’s over a third – across all age groups – highlighted this issue as being their top reason to potentially leave a social network.

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**Top triggers to leave social media networks**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>If all contacts move to the new one</td>
<td>33%</td>
</tr>
<tr>
<td>If I get bored</td>
<td>32%</td>
</tr>
<tr>
<td>If the app is asking for money in return for its service</td>
<td>26%</td>
</tr>
<tr>
<td>If I have growing privacy concerns</td>
<td>23%</td>
</tr>
<tr>
<td>It is too time consuming</td>
<td>22%</td>
</tr>
<tr>
<td>If it is not mobile friendly</td>
<td>20%</td>
</tr>
</tbody>
</table>

**Question:** Which of the following factors would make you consider leaving a social media platform?

**Figure 12:** Top triggers to leave social media network: total population.
**Trigger to leave a social media network: Analysis of “Getting bored”**

<table>
<thead>
<tr>
<th></th>
<th>Qatari</th>
<th>Non-Qatari</th>
<th>Males</th>
<th>Females</th>
<th>15-29 YO</th>
<th>30-39 YO</th>
<th>40+ YO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>36%</td>
<td>31%</td>
<td>30%</td>
<td>37%</td>
<td>37%</td>
<td>28%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Question:** Which of the following are important to you when deciding which media platform to use? Getting bored

**Figure 13: Trigger to leave a social media network: Analysis of “Getting Bored”**
24

Concerns and solutions

4

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. Interestingly, social media users typically hold this view, irrespective of their age, nationality or gender.

Over three-quarters feel social media “takes away from quality time with the family.”

68% of our sample also felt that it was intruding on people’s private life.

65% expressed the view that social media is “leading to a wider generation gap.”

56% admitted to having used fake names on Facebook.
Whilst just under a third admitted to doing this on WhatsApp, nearly a quarter on Instagram, and nearly one in five on Twitter.

14% of users used fake names on Forums; rising to 26% of Qatars.
After exploring drivers for usage, including the reasons why users might consider leaving a social network, we also asked respondents about specific concerns they had about social media. This included the societal impact of social networking; as well as some of the mechanisms, which they might deploy to help manage some of these potential issues.

In particular, it was notable that respondents had concerns about the impact of social media on family time, personal privacy, and the creation of a generation gap. As a result, some researchers have started to talk in terms of “anti-social networking.”

These issues are not unique to Qatar. These anxieties also need to be offset by some of the benefits social media affords; including the opportunities to meet new people, stay in touch with friends and family; as well as providing a platform for creative expression. Our respondents highlighted these benefits too.

Meanwhile concerns around verification and the spreading of rumors online—identified as an issue by 85% of our sample—continue to be wrestled with by both social media users, marketers, lawyers and journalists. In such a rapidly changing space, the need for strong digital and media literacy skills are paramount; so that users can make informed decisions about what sources to trust, alongside what information they wish to share (and with whom).

One of the solutions to some of the issues that our study identified is the deployment of fake names and online identities by some users. Over half of our sample admitted to having used a fake name on Facebook; and this behavior has manifested itself across other channels too.

Alongside this, the rise of private groups on channels such as WhatsApp are another means for audiences to control elements of the conversations and data they are sharing.

In Qatar, our research shows that these groups are not just confined to family groups, or arranging a social gathering. Groups which discuss religious issues and new stories abound; as do opportunities for retail. These will be interesting developments to watch.

4.1 Negative attitudes towards social media

We asked social networkers a series of statements related to positive and negative aspects of social media; asking if they “agree” or “disagree” with the statements being posed.

The negative aspects of social network usage is perhaps the most interesting to probe, as it helps shed light causes of concern and areas where users may need training, support and reassurance (see Figure 14).

Key Insights:

85% felt that social media is “helping to spread rumors and false information.”

It is worth reiterating that this figure is derived from a sample of Internet users. If non-users were included in this study then this percentage might be higher still. This concern—around the spreading of rumors and false information—was the most negative aspect of social media identified by our study.

Over three-quarters felt that social media “takes away from quality time with the family”

Alongside this, 68% of our sample also felt that it was intruding on people’s private life; and 65% expressed the view that social media is “leading to a wider generation gap.”

There is a smaller divergence of opinion around the idea that social media is a “waste of time” or that “it’s diluting people’s sense of culture.”

In both of these aspects there was a much smaller differentiation (12% in terms of culture and 13% for time-wasting) than the other potentially negative aspects that we asked about.
4.2 Rumors

Given that 85% of our survey agreed with the statement that social media is “helping to spread rumors and false information” (see Figure 14) we felt that this was a question which merited further analysis.

What was surprising about this was to see that there was no significant difference in this attitude across any of our different data splits (see Figure 15).

Social media users typically hold this view, irrespective of their age, nationality or gender.
One area where we anticipated that there might be some key issues in the social media space was around privacy. We have already discovered that: Only 31% of users stated that “it has enough privacy concerns” was a consideration before deciding to potentially use a new social network.

Although this figure is higher (41%) among Qatari females. Among non-Qatari females this drops to 21%; and 20% for non-Qatari males (see Figure 13).

As a reason for leaving a network, “growing privacy concerns” was identified by only 23%. This potential cause was classified behind other factors such as boredom, being asked to pay to use the service and the migration of friends and contacts to newer networks (see Figure 12).

Alongside this, as we saw in Section 4a (see Figure 14), that 68% of our sample felt that social media was “intruding people’s private life.” When analyzed in more detail, we found:

The concerns of Qatars and non-Qatars are aligned on this issue. Differences here are negligible (see Figure 16).

Women are more likely than men to express this concern. 77% of females expressed this view, compared to 66% of men.

This concern was lowest amongst older users. Those aged 40% were the most likely to disagree with this view.
**Growing privacy concerns across Age, Gender and Nationality groups**

**Question:** Which of the following factors would make you consider leaving a social media platform? Having growing privacy concerns

**Figure 16:** Growing privacy concerns across nationalities, gender and different age ranges.

**Growing privacy concerns: Total population / males vs females**

**Question:** Which of the following factors would make you consider leaving a social media platform? Having growing privacy concerns

**Figure 17:** Growing privacy concerns: Total population / males versus females.
4.4 Usage of fake names

One potential means to navigate privacy concerns is for users to avoid using their real name on social networks, or to use a generic image (like a flower, animal, or place) as their profile picture.

Our research shows that the practice of using fake names, or online identities, which do not include one’s full real name - is deployed by different nationalities of social networkers in Qatar (see Figure 18).

Across our sample:
56% admitted to having used fake names on Facebook.
Along with 31% on WhatsApp, 23% on Instagram and 18% on Twitter.

Figure 18: Using fake names across all social media platforms: total population.
We dived deeper into these answers to unearth more insights related to Qatari social network users (see Figure 19). This revealed that:

**The most common platforms for using fake names were Instagram and Twitter.**
Nearly half of Instagram users (44%) admitted they did not necessarily use their real name on the network (although some may also have multiple accounts using different identities).

**Older Qatari women are the most likely to use false names on social networks.**
33% of Qatari females have done so, compared to 22% of those aged 15-29.

**26% of Qatari used fake names on forums.**
Compared to just 14% of our full sample.

**Figure 19: Qatari usage of fake names across platforms.**

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhatsApp</td>
<td>30%</td>
</tr>
<tr>
<td>Facebook</td>
<td>29%</td>
</tr>
<tr>
<td>Twitter</td>
<td>37%</td>
</tr>
<tr>
<td>BBM</td>
<td>26%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>15%</td>
</tr>
<tr>
<td>Instagram</td>
<td>44%</td>
</tr>
<tr>
<td>Path</td>
<td>3%</td>
</tr>
<tr>
<td>Forums</td>
<td>26%</td>
</tr>
</tbody>
</table>
Conclusion and recommendation

As this report demonstrates, social media plays an active role in the lives of many Internet users in Qatar.

Although we see differences across nationalities, gender and age groups; awareness and usage of social networks is high. Over 50% of our sample have heard of five of the eight social channels we asked about, with half of these being used by over a third of our sample.

To help readers make sense of the conclusions from our study, this report is also accompanied by a series of infographics, which can be found on our website. These have been designed to support business, Government and other bodies in their deployment of social media as a means to engage their stakeholders and target audiences.

We also believe that our findings have helped to identify areas where further research, training and policy activity may need to be considered.

In the research space, the general aversion to Facebook demonstrated by Qataris in this study is one area which may merit further exploration; especially when considered alongside the popularity of this channel with other demographics.

Similarly, the role that social media is increasingly playing in growing e-Commerce - or acting as a platform for news and information dissemination -are areas which could potentially benefit from longitudinal study.

Given the more passive nature of social media consumption in Qatar, using these platforms to encourage genuine two-way dialogue way take some time; and a recognition that for some players channels such as WhatsApp and Instagram may be more beneficial than Facebook and Twitter. The latter are more traditionally used for such digital marketing purposes, so social media managers will need to be innovative in their usage of emerging networks as platforms for engagement.

The role of “boredom” in social media churn identified in this study also suggests that if brands wish to retain audiences, then this is further evidence of the need to continually innovate; via both emerging and established social channels.

Finally, although explicit privacy concerns were ranked lower by our sample than we envisaged, various social media behaviors identified in this study suggest that this is an underlying concern for many users. These considerations potentially manifest themselves in different ways; witness the level of photo sharing – for example – by Qatari’s across different social networks, or the usage of false names and identities on various channels.

All of these privacy-based conclusions suggest that media literacy efforts remain important as a means to educate and empower users; so that they can harness the potential of social networks in a manner with which they are comfortable.

Moreover, given the fast changing nature of the social media space, including the introduction of new features and the constant tinkering with privacy policies (which users are not always be aware of), the need to support a digitally literate social media population is on-going.

ictQATAR looks forward to continuing to work with a wide range of stakeholders in making this happen, so that everyone in the social media ecosystem is able to benefit from this technology in a manner that best suits their own needs and aspirations.
Methodology

ictQATAR commissioned Ipsos MENA to conduct this research. Given the unique population structure of Qatar we boosted the sample of Qatari nationals. We had a confidence level of 95%.

Fieldwork was undertaken between 1st September 2014 and October 16th 2014

The questionnaire was developed by the Rassed team at ictQATAR in conjunction with Ipsos.

Population & data collection:
- Population Studied: the population studied are the Online Users in Qatar
- Data Collection: Done by Computer Assisted Telephonic Interview (CATI)
- Length of Interview: 15 minutes

Sample Size & Structure
- Sample Size: 1,000
- Sample structure: Sample is representative to the Internet population, which is different than the total population split. Our sample consisted out of participants from the different Qatari municipalities; to ensure geographical representation.

- The source for determining the sample split for the internet population in every market is the syndicated audience measurement studies that Ipsos MediaCT conducts in the region on a regular basis, where we ask for information related with online penetration and frequency.

For more information please contact Ipsos Qatar.
Tel: +974 4401 0666. Email: admin.qatar@ipsos.com
Weighting

There are various methods to weigh the data. Ipsos uses one of the most accurate methods called Rim Weighting; and this weighting method has been used in this study.

Rim Weighting ensures that each individual is weighted for all the parameters that he/she is present in. Thus, an individual is weighed for age he/she belongs to, gender and nationality. It can also simulate a cell matrix, even with an empty cell, using “collapsed cell”

The weighted data then is projected back to the population size of each city / country. Projections are carried out at cell level that comprises of age, gender and nationality.
1. Facebook, for example, expanded from being a service typically only used by University students to a commercial entity with a global user base of 1.35 billion monthly active users. See: Facebook, Newsroom. Available at: http://newsroom.fb.com/company-info/Figure as of September 30, 2014

2. For example Google+, Twitter and LinkedIn

3. 56 % of US social networkers, according to a survey from June 2013, stated they were afraid of missing news on social networks: Statista Portal, Percentage of U.S. social networkers who suffer from FOMO as of June 2013. Available at: http://www.statista.com/statistics/262138/percentage-of-us-social-networkers-who-suffer-from-fomo/.


6. Ibid


12. Examples include Qatar Living, I Love Qatar and QatarShares.


“Last summer, 40 percent of traffic came from search engines, and 14 percent came from social networks. This summer, about 29% of traffic comes from each.”


