

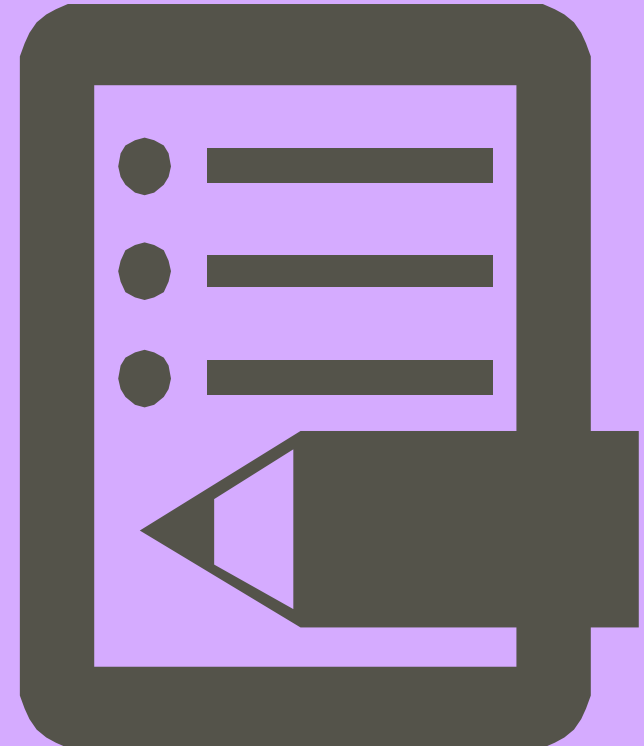


Ipsos Online Audience Measurement in The Arab World

2013

CONTENT

- **About the study**
- **Internet penetration**
- **General browsing behavior**
- **KSA ratings**
- **Egypt ratings**
- **Jordan ratings**
- **UAE ratings**
- **In-depth analysis**





What is Ipsos Gemius “online audience measurement” study?

A study conducted among internet users to track the internet consumption and behavior across individuals in MENA

What countries do you cover?

The study covers 11 MENA countries. Ipsos deliver “fusion panel” data for four countries (i.e. KSA, Egypt, Jordan, and UAE) and this include data of participated websites and non-participated websites. On the other hand, Ipsos also provide “Cookie Panel” data for 11 countries (i.e. KSA, Egypt, Jordan, UAE, Lebanon, Kuwait, Iraq , Morocco, Oman, Syria, Qatar) which includes data from more than 300 local participated websites. For the latter, Ipsos tag the websites pages with a specific script.

What is fusion Panel?

Fusion panel data is a hybrid approach that combines data output from the cookie panel (i.e. participated/scripted websites) and Software panel (i.e. group of internet users who download Ipsos application in order to monitor their online surfing behavior)

- *More about the Software Panel:*

The application downloaded on the panellists PC/Laptop (called netpanel), is a passive measurement approach that will collect online behaviour data such as websites visits, page views, time spent etc... Therefore, the data of non-scripted websites such as facebook, google, youtube etc... can be generated.



- **Cookie Panel:**

These websites will add a code on their site. This code will allow to collect online traffic data such as uniques/cookies, page views, geo-location, etc. Also we initiate a pop up survey on these websites in order to collect socio-demographic data of audience such as age, gender, nationality etc...

What is your sample size?

- Total software panel sample size: 20,219
- Total cookie panel sample size: 35,676

What are the “key” media metrics that Ipsos-Gemius online audience measurement study can provide?

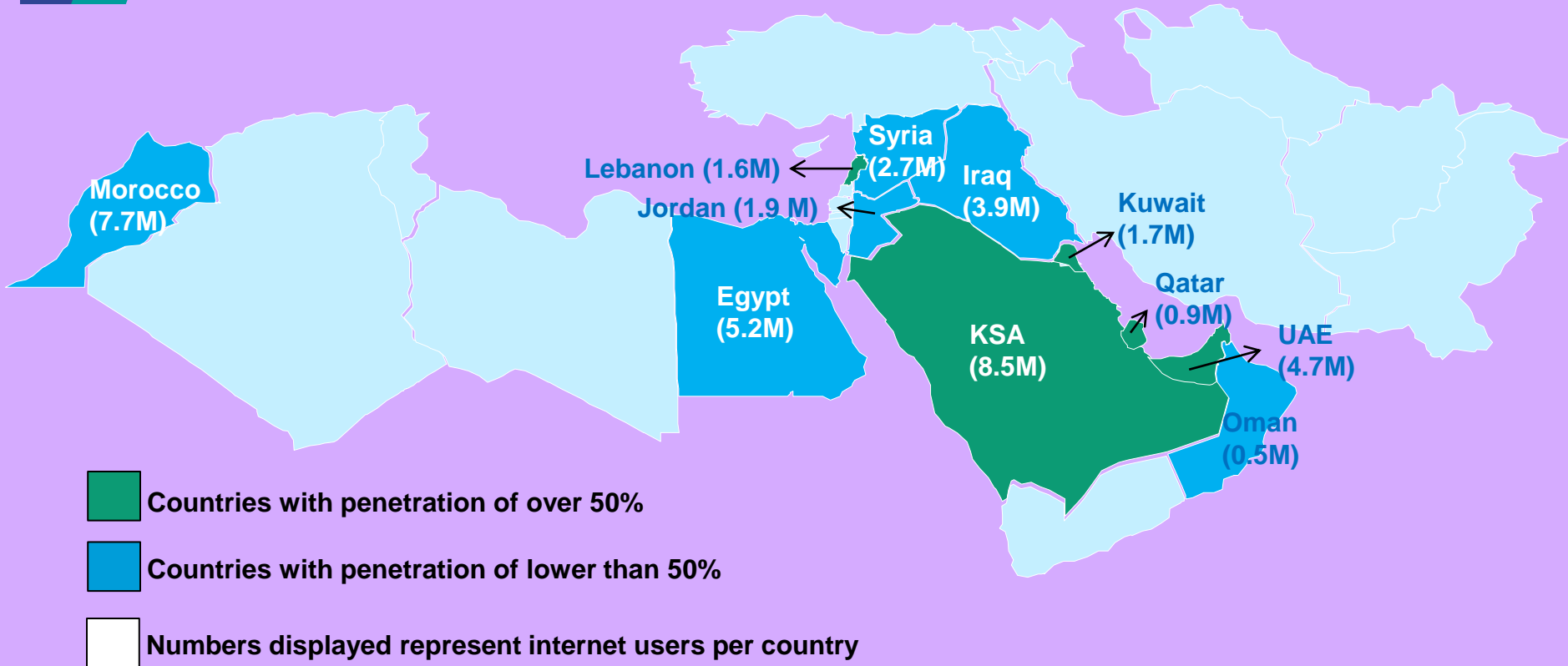
- Reach: % of Real Users – Internet Individuals
- Number of Page Views
- Number of uniques/cookies
- Number of visits
- Time spent per visit/ visitor
- Audience composition PV /Time Composition, and audience duplication .
- Demographic details (e.g. nationality, gender, age, purchase behavior, marital status, other media usage...etc)

Internet Penetration



MENA Avg. Monthly Internet Penetration - Geographic Overview

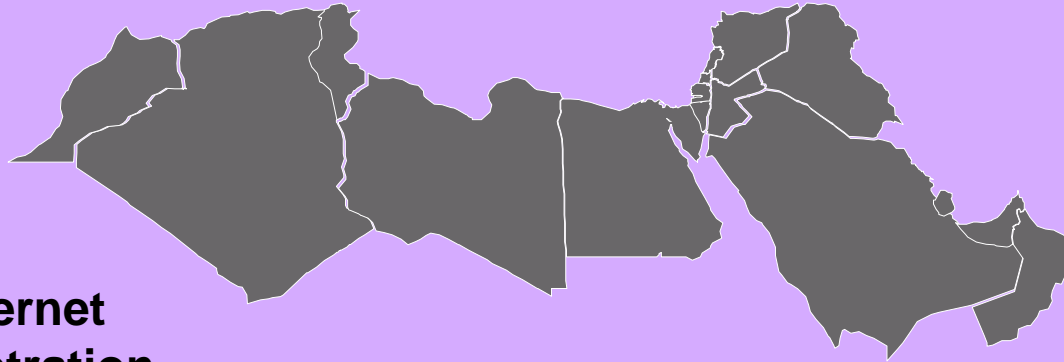
KSA, UAE, Egypt(urban), Kuwait, Jordan, Morocco, Lebanon, Qatar, Oman, Iraq, Syria



	Total Population 15+	Internet Users	Internet Penetration
Total MENA	102,895,268	39,249,068	38%
GCC(KSA, UAE, Kuwait, Oman, Qatar)	26,711,000	16,220,813	61%
North Africa (Egypt-urban, Morocco)	43,071,000	12,940,822	30%
Levant (Lebanon, Syria, Jordan, Iraq)	33,113,268	10,087,433	30%

Internet Population Vs. Internet Penetration

MENA Markets Overview



Internet penetration

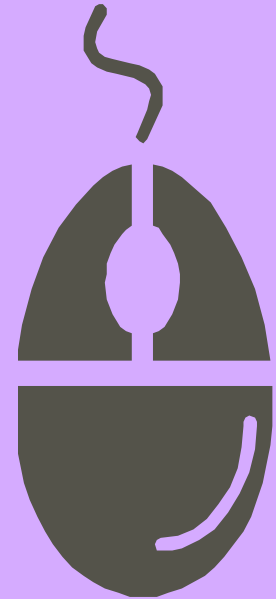
UAE	71%
Kuwait	62%
Qatar	61%
Saudi Arabia	60%
Lebanon	52%
Jordan	48%
Morocco	35%
Syria	30%
Oman	28%
Egypt (Urban)	25%
Iraq	23%

Internet population

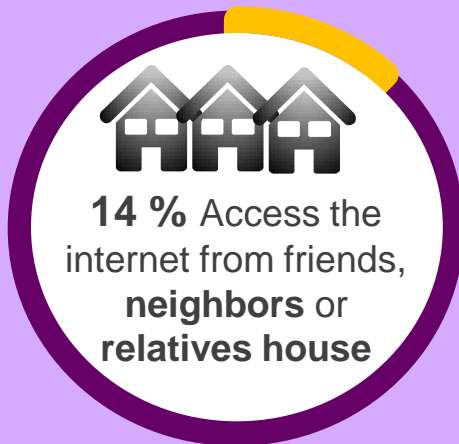
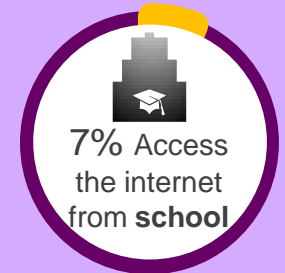
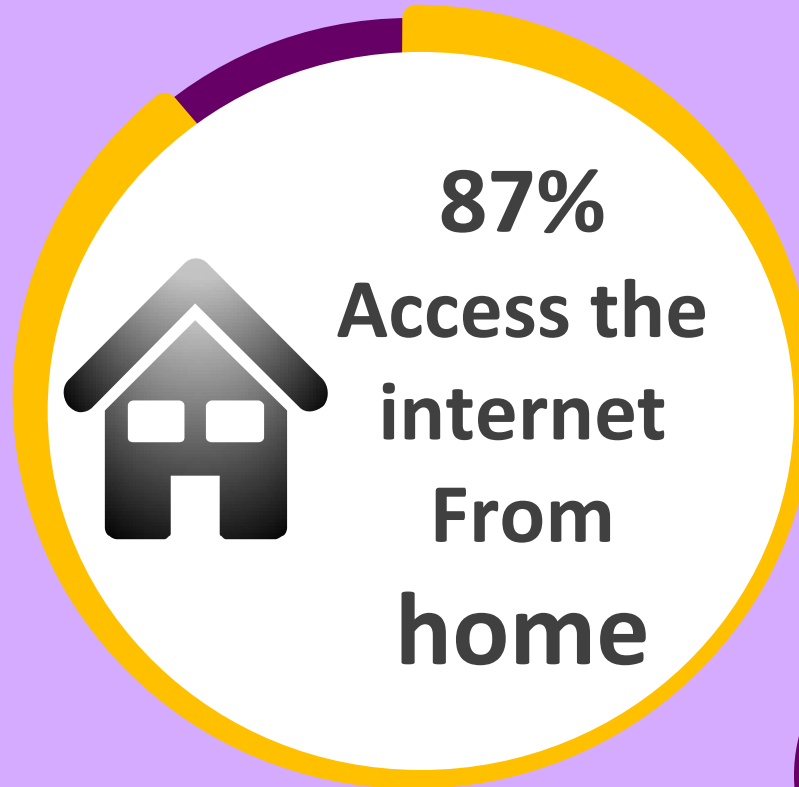
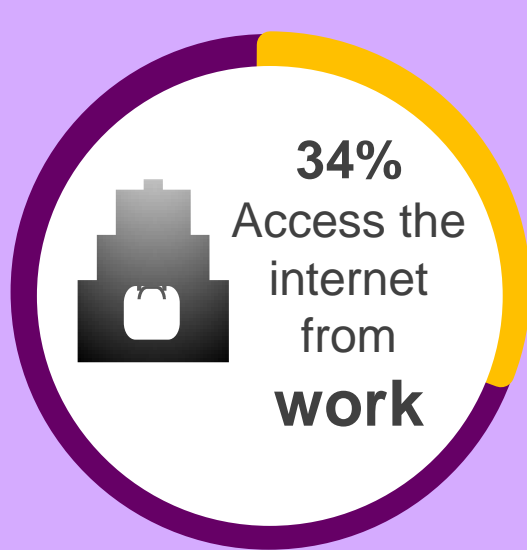
Saudi Arabia	8,493,252
Morocco	7,743,266
Egypt (Urban)	5,197,556
UAE	4,674,537
Iraq	3,852,420
Syria	2,736,715
Jordan	1,907,451
Kuwait	1,664,381
Lebanon	1,590,847
Qatar	890,160
Oman	498,483

MENA

General Browsing Behavior



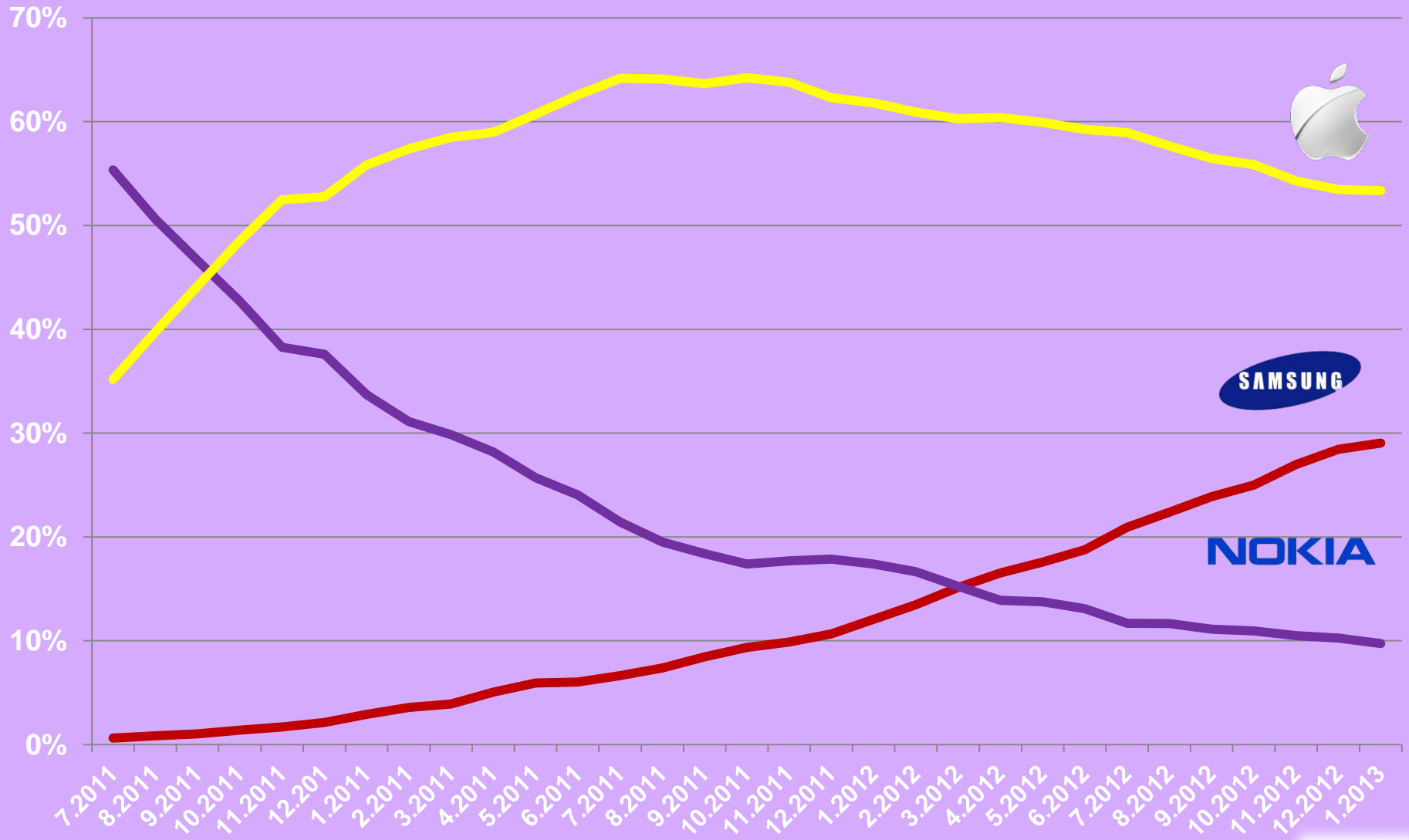
Main Place of Accessing the Internet





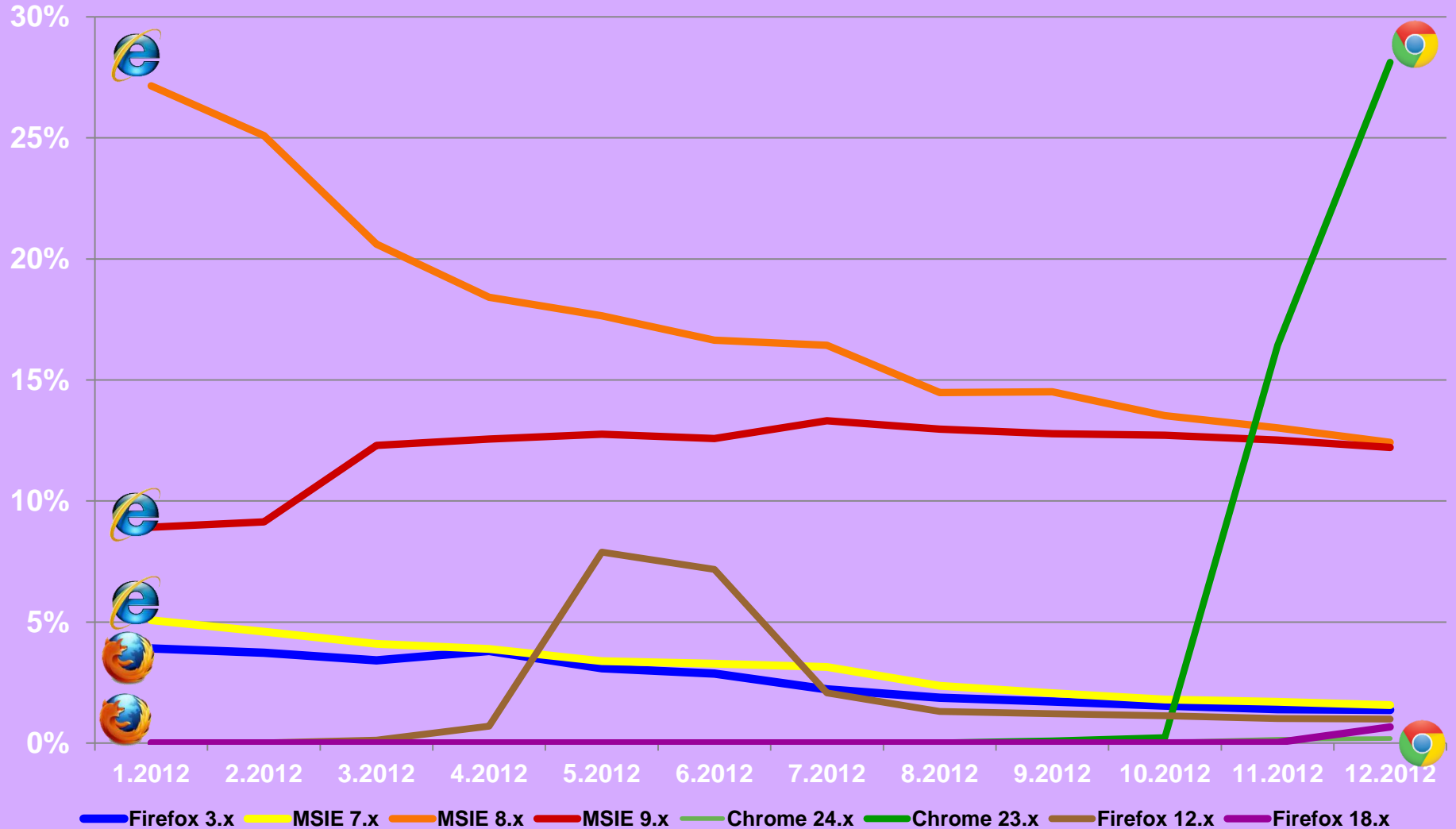
Mobile Devices Penetration (Producers)

The ranking is based on the website-averaged percentage share of page views on sites participating in the study.

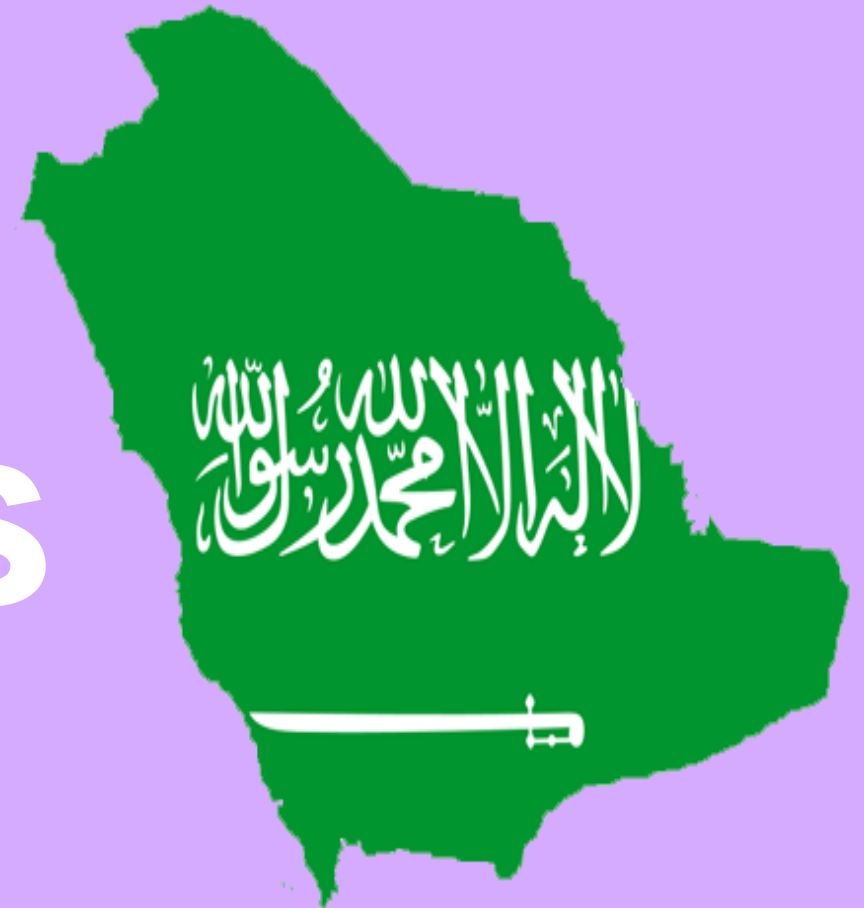


Web Browsers Penetration

The ranking is based on the number of page views concerning sites included in the gemiusTraffic study.



KSA Ratings



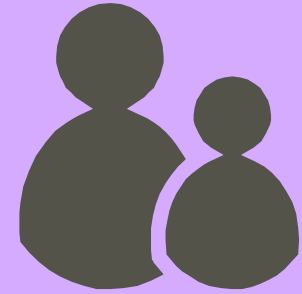
Internet Breakdown - KSA



8.5 Million Internet Population

60% Internet Penetration

Grouped Nationalities



83% Saudis
17% Arabs

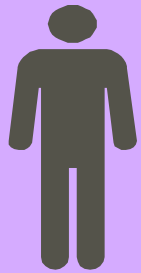


40% from 20-30 years old

24% from 31- 40 years old

19% from 15- 19years old

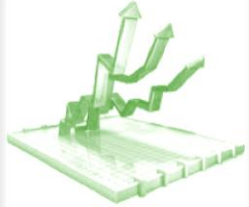
17% from 40+ years old



57%
Males



43%
Females



Finance & stock market websites have the highest **reach**, highest **page views**, **visits**, and **time spent per visit** compared to other countries.



Recruitment websites have the highest **reach**, **page views**, **visits**, and **time spent per visit** compared to other countries.



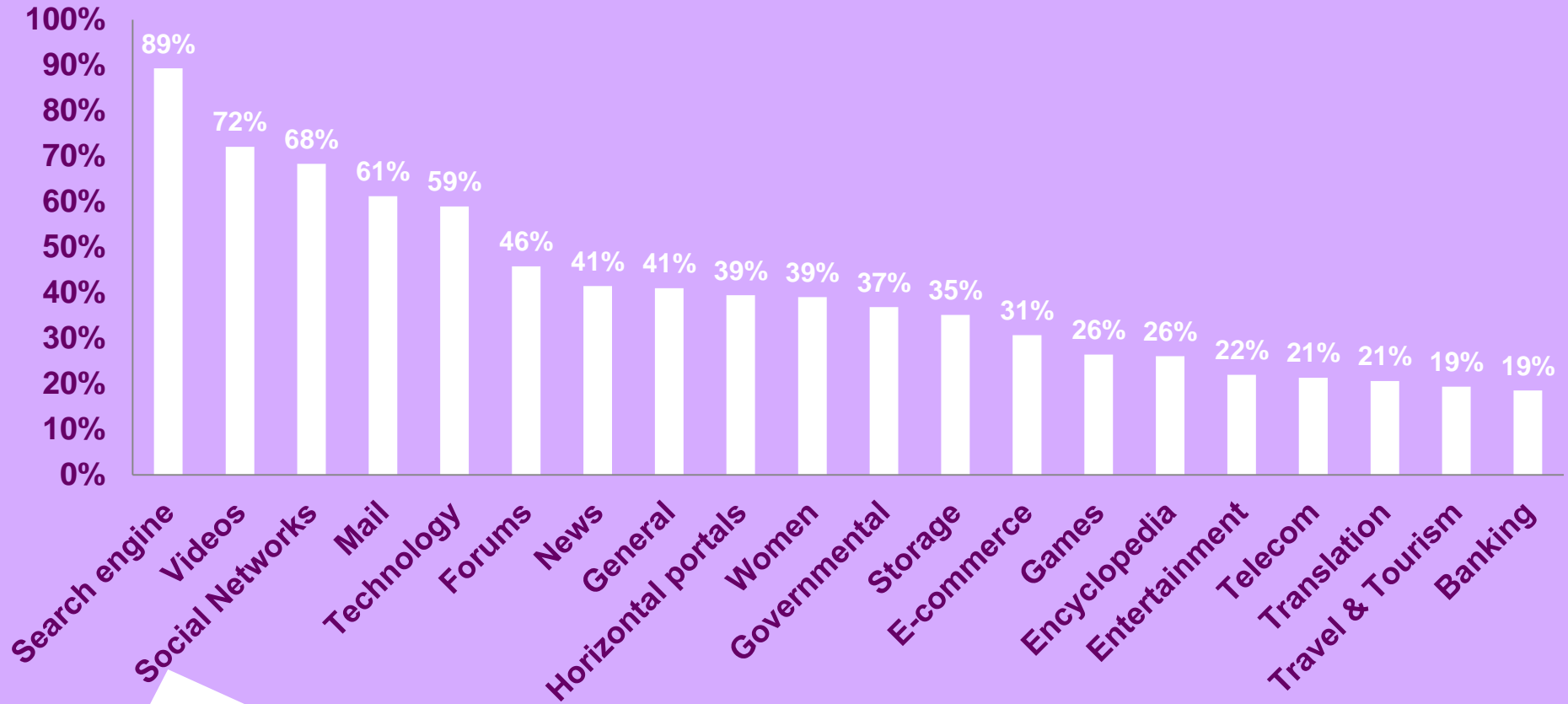
Videos websites have the highest **reach**, **page views**, **visits**, and **time spent per visit** compared to other countries.



Governmental websites have the highest **reach**, **page views**, **visits**, and **time spent per visit** compared to other countries.

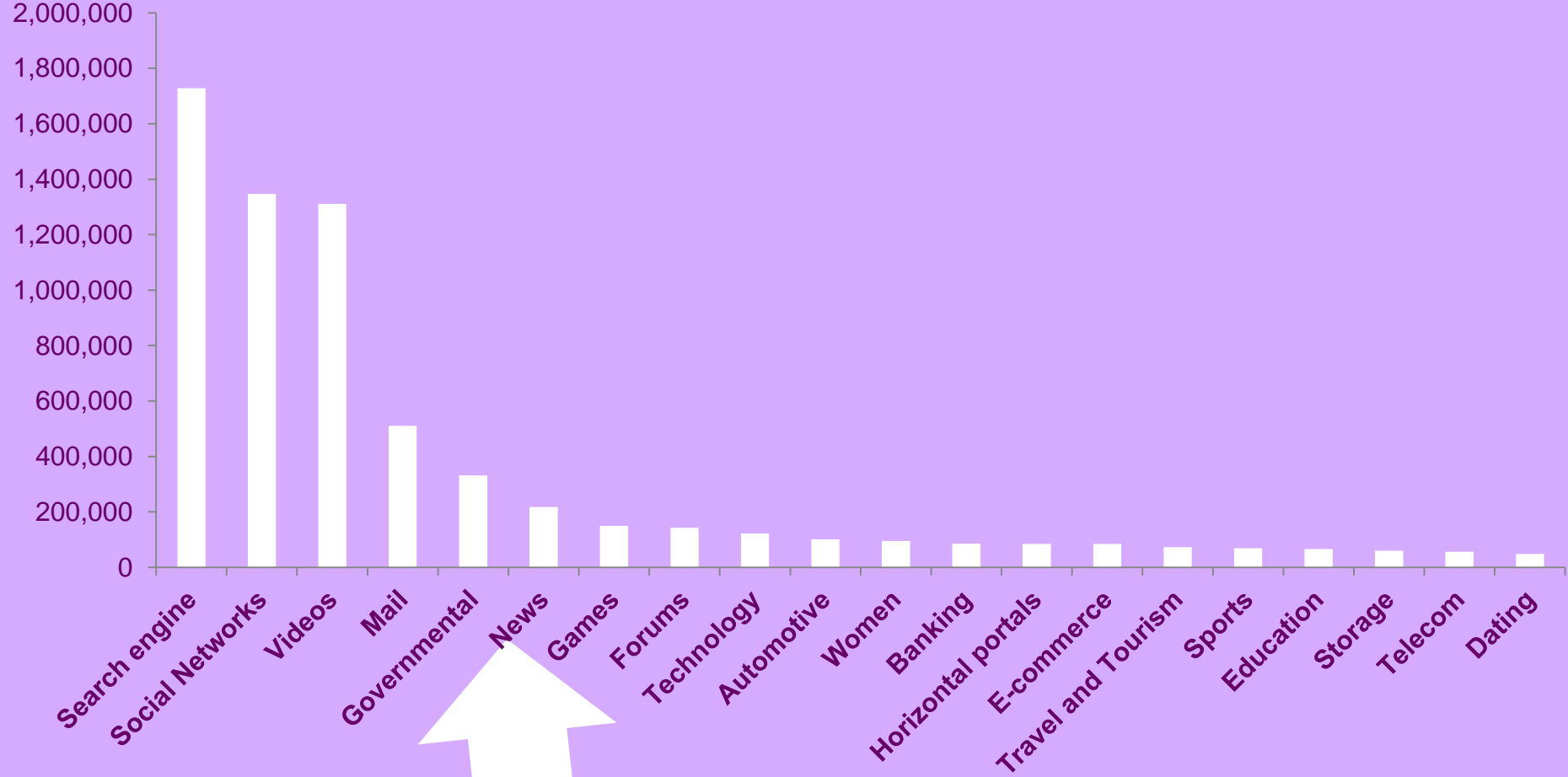


Top 20 websites categories

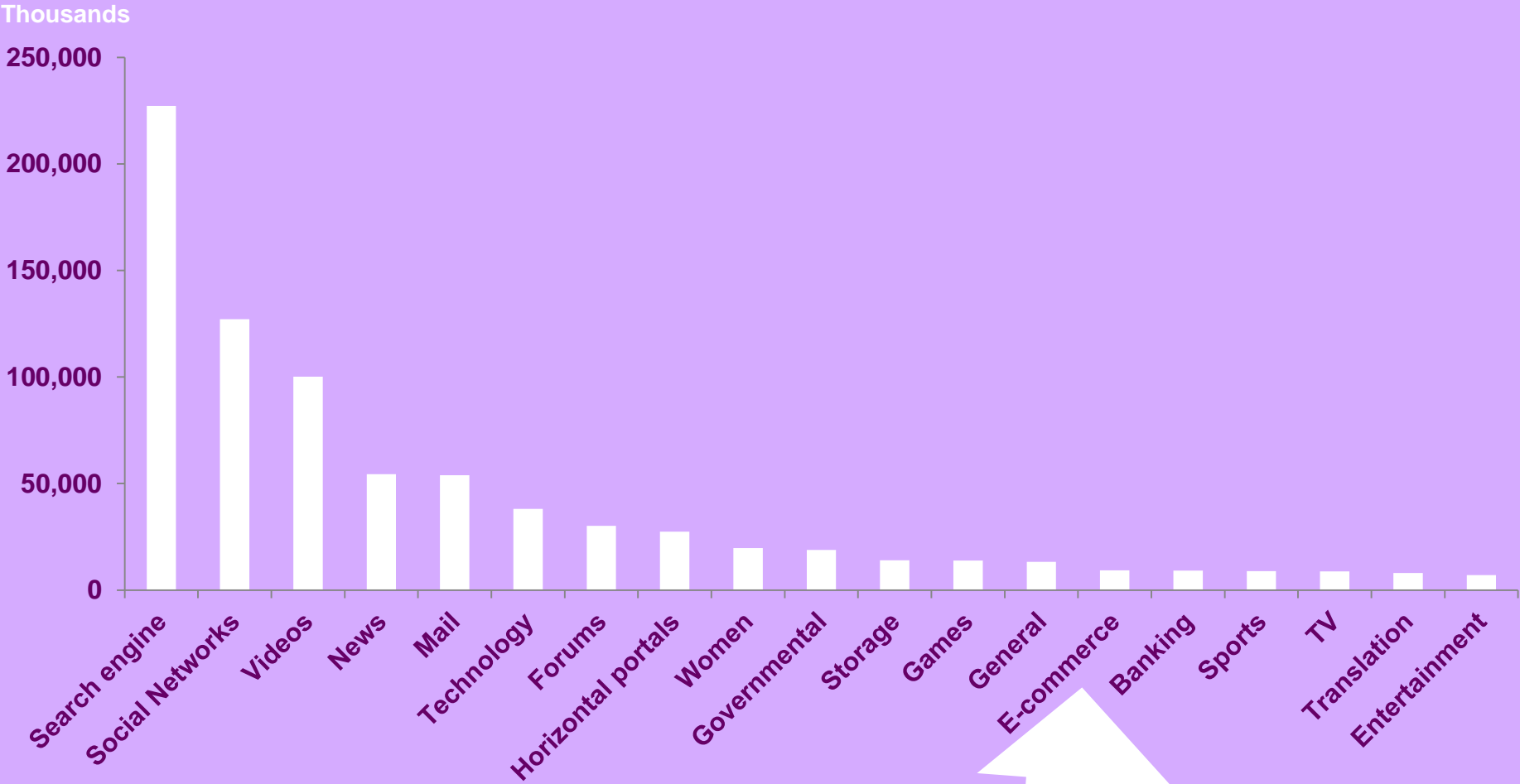


Top 20 websites categories – Internet Reach

Thousands

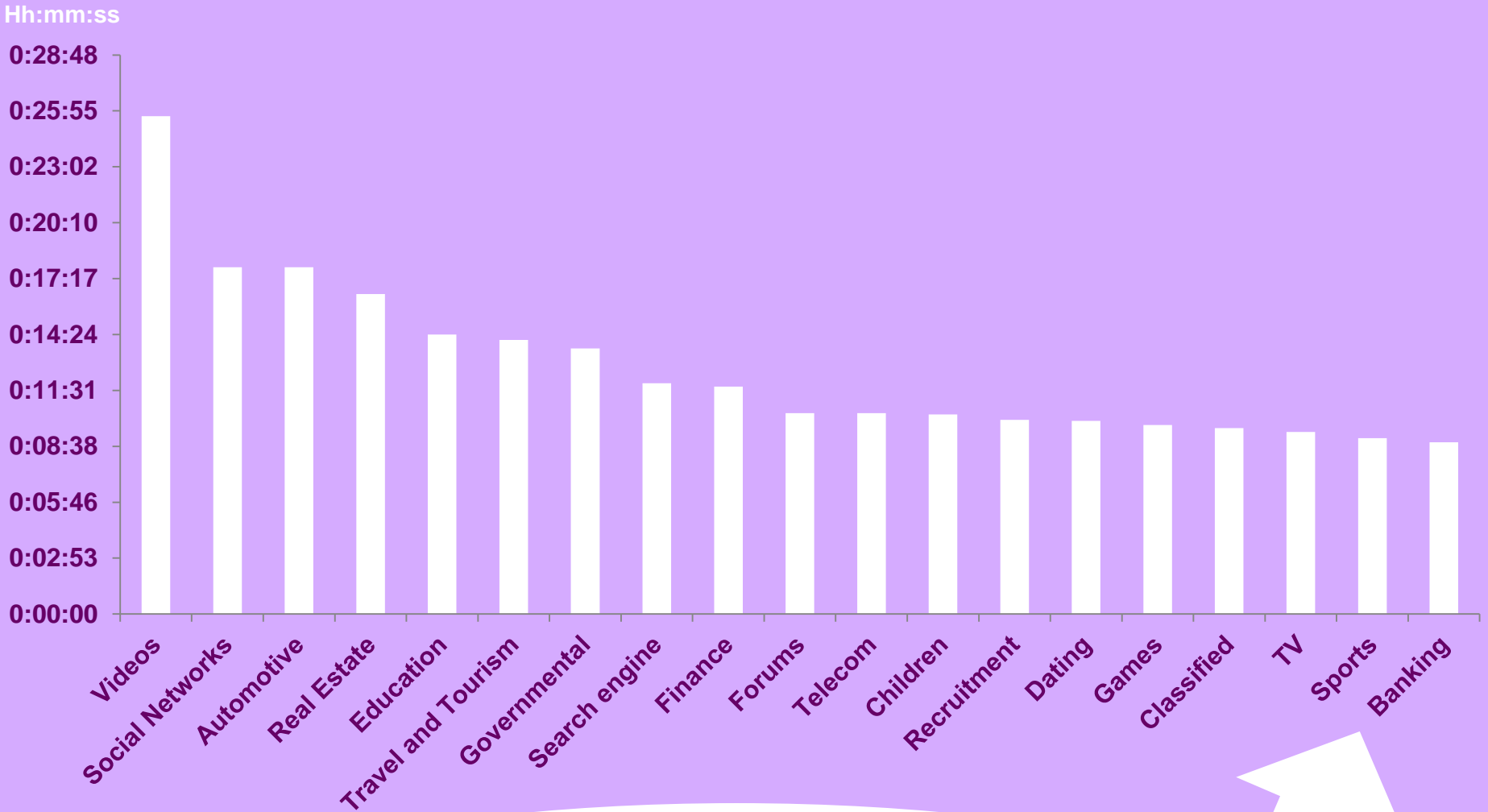


Top 20 websites categories — Page Views



Top 20 websites categories – Visits

Avg. Time Spent per Visit



Top 20 websites categories – Time spent per visit

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor





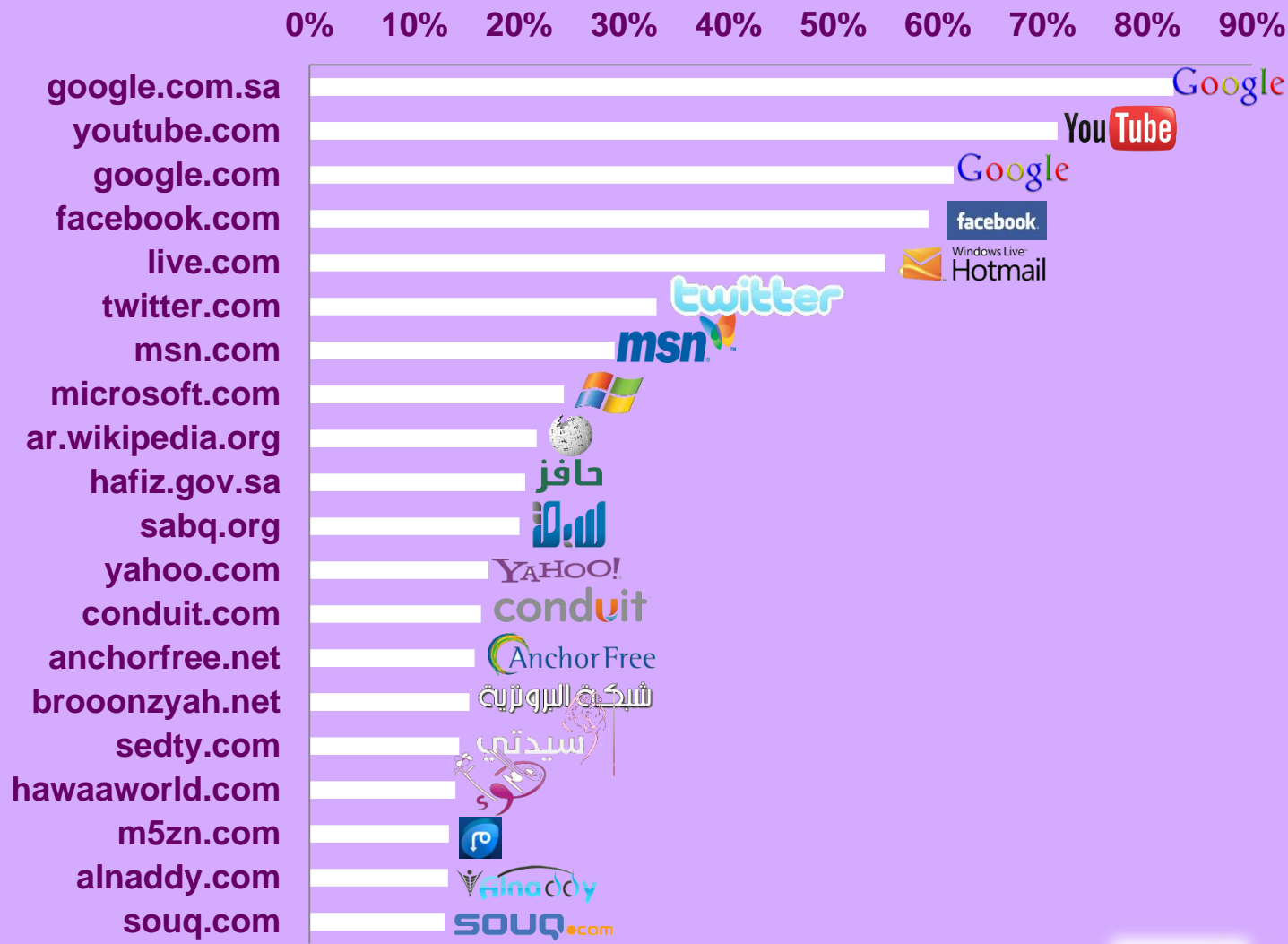
Reach-Internet

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

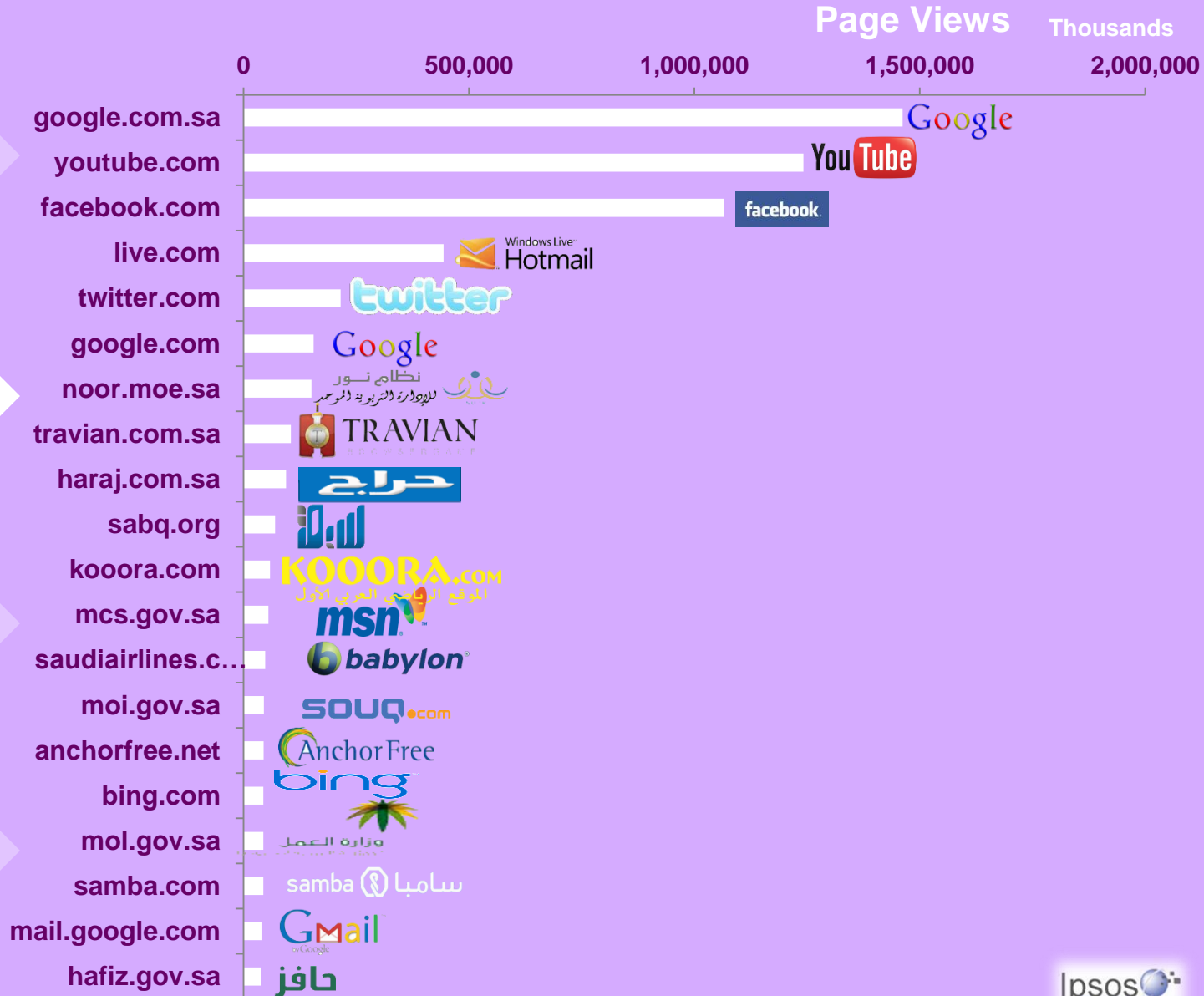


Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

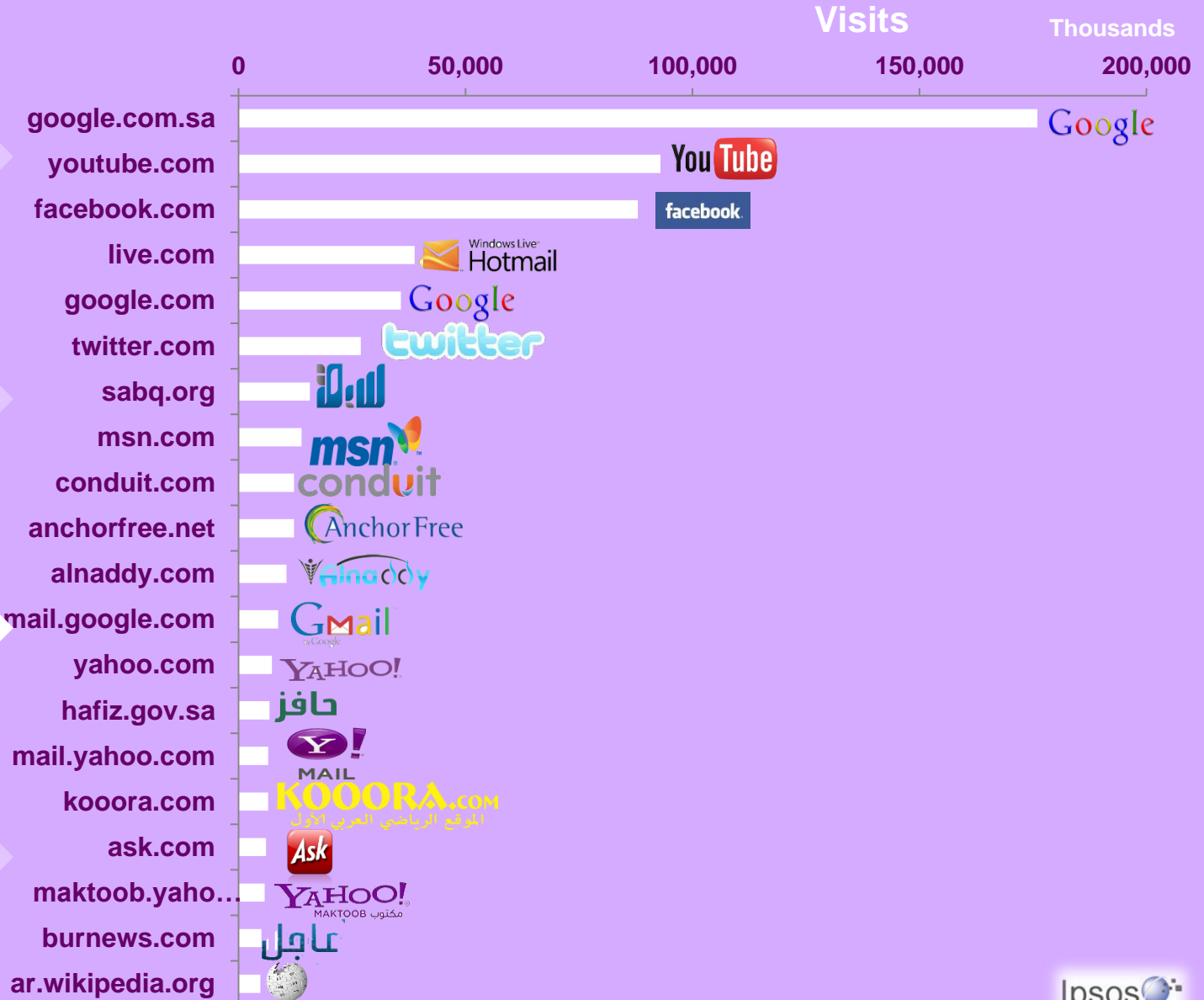


Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

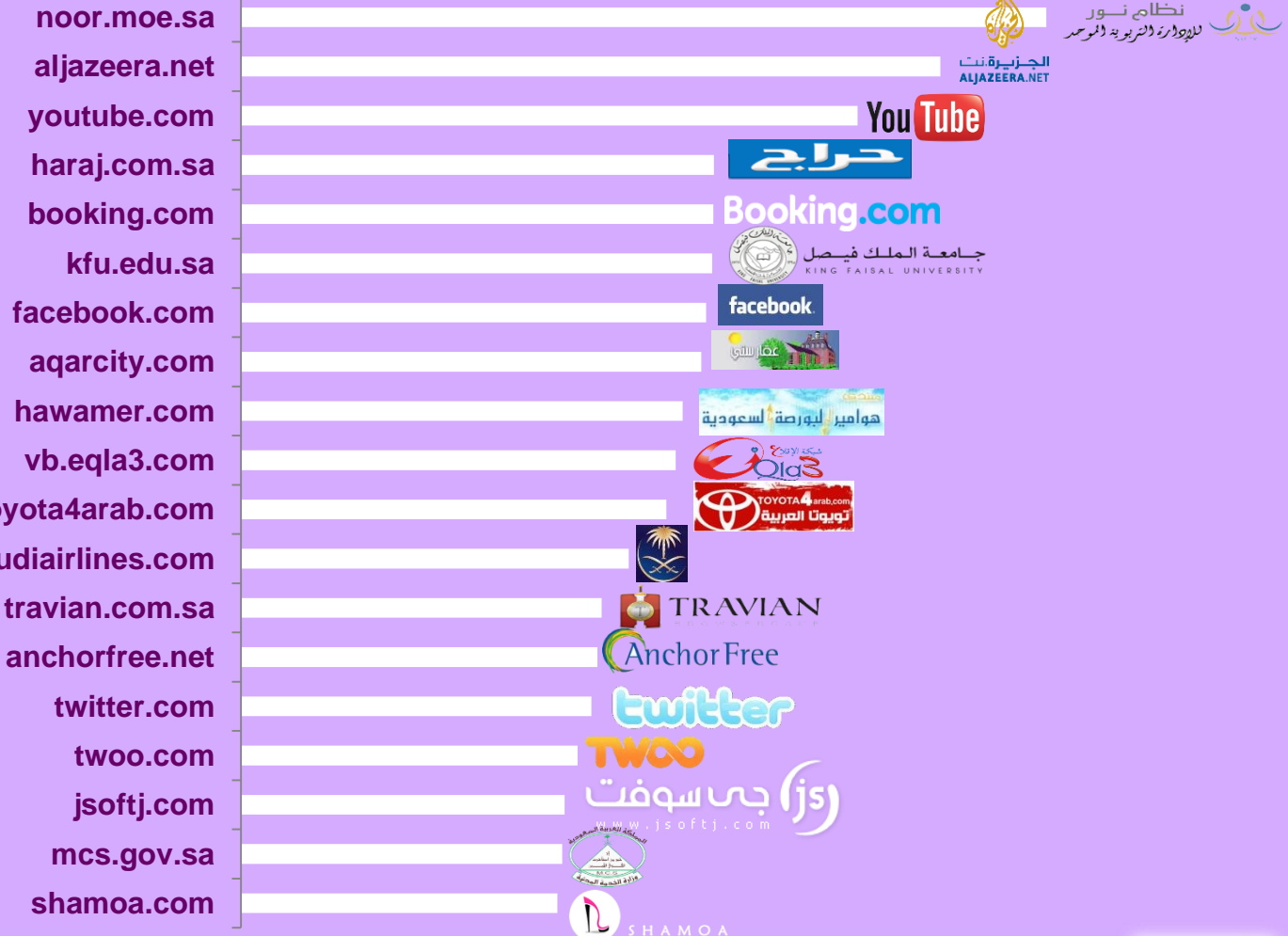
Based on Avg. Time Spent per Visitor



Time Spent per Visit Hh:mm:ss

0:00:00 0:07:12 0:14:24 0:21:36 0:28:48 0:36:00 0:43:12

Based on Avg. Monthly Internet Reach



Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

Egypt Ratings

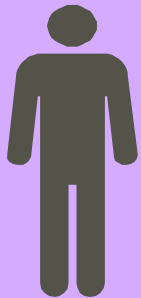


Internet Breakdown - Egypt

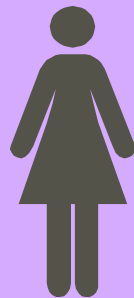


5.1 Million Internet Population

25% Internet Penetration



62%
Males



38%
Females

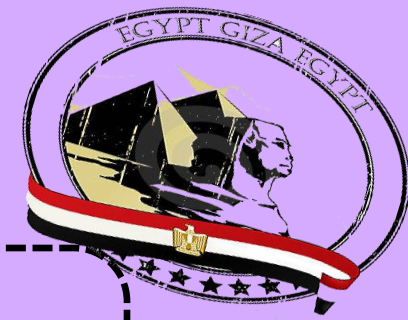


43% from 20-30 years old

28% from 15-19 years old

15% from 31-40 years old

14% from 40+ years old



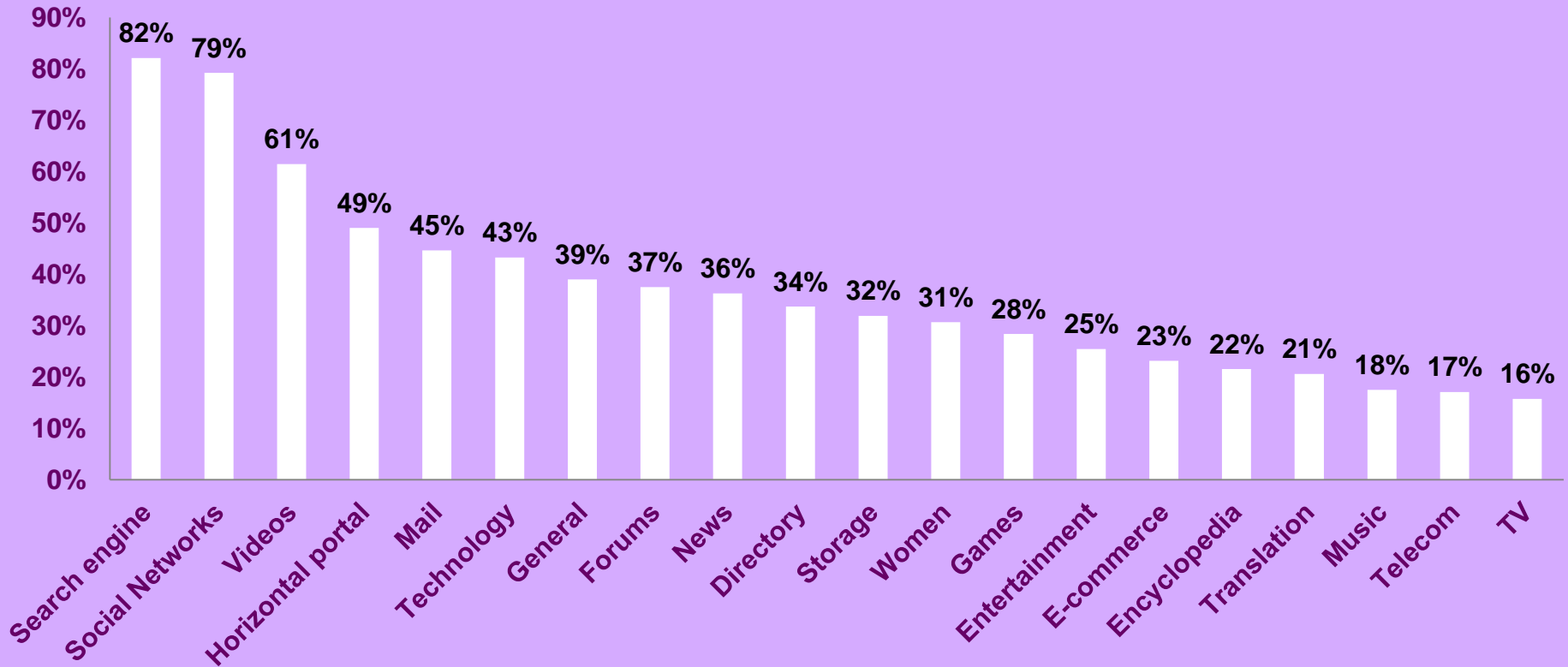
Music websites have the highest **reach**, **page views**, **visits**, and **time spent per visit** compared to other countries.



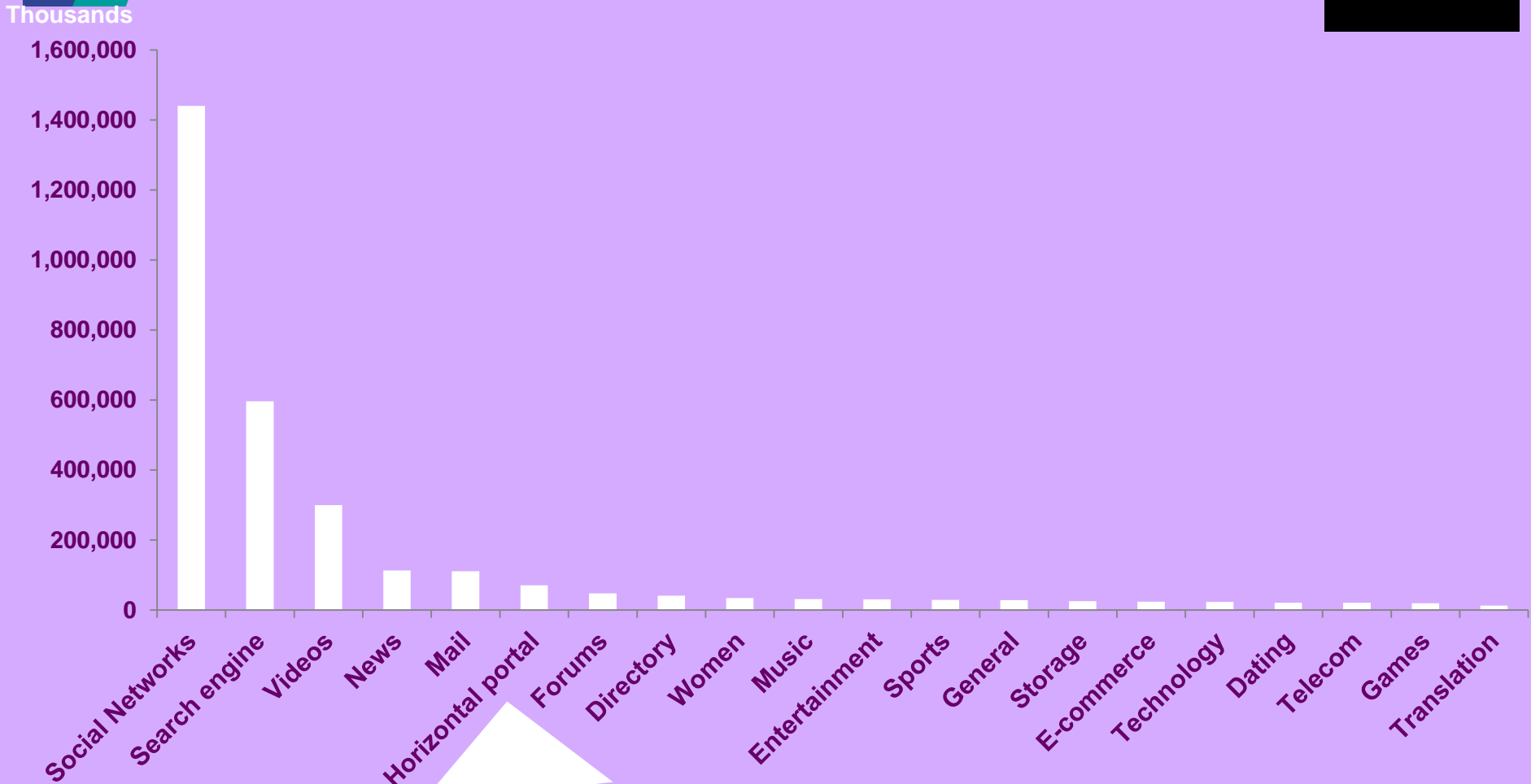
In Egypt, both religion and dating websites are in the top 5 categories that Egyptians **visit** and spend **time** on per each visit.



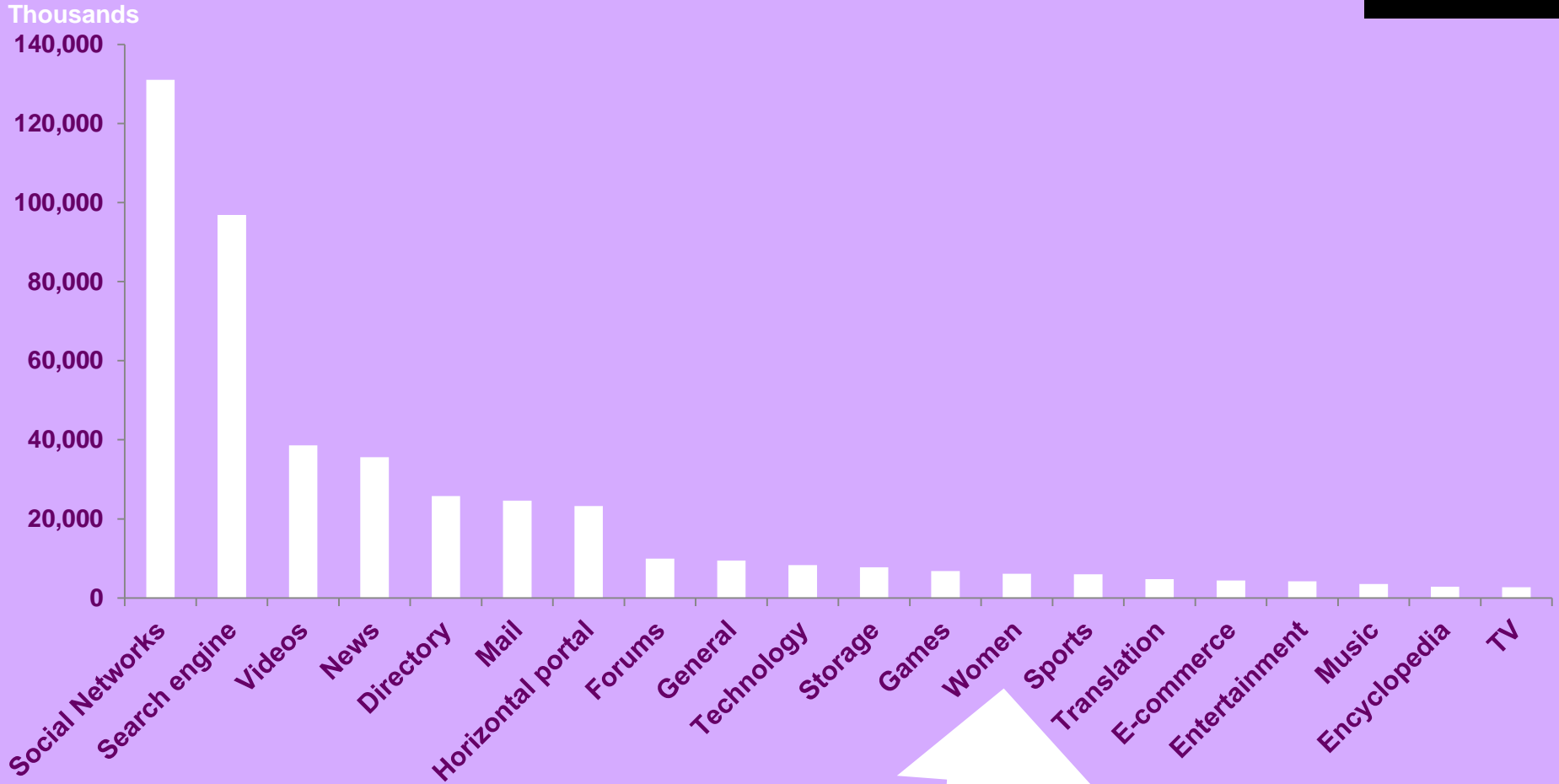
Top 20 websites categories



Top 20 websites categories – Internet Reach



Top 20 websites categories — Page Views

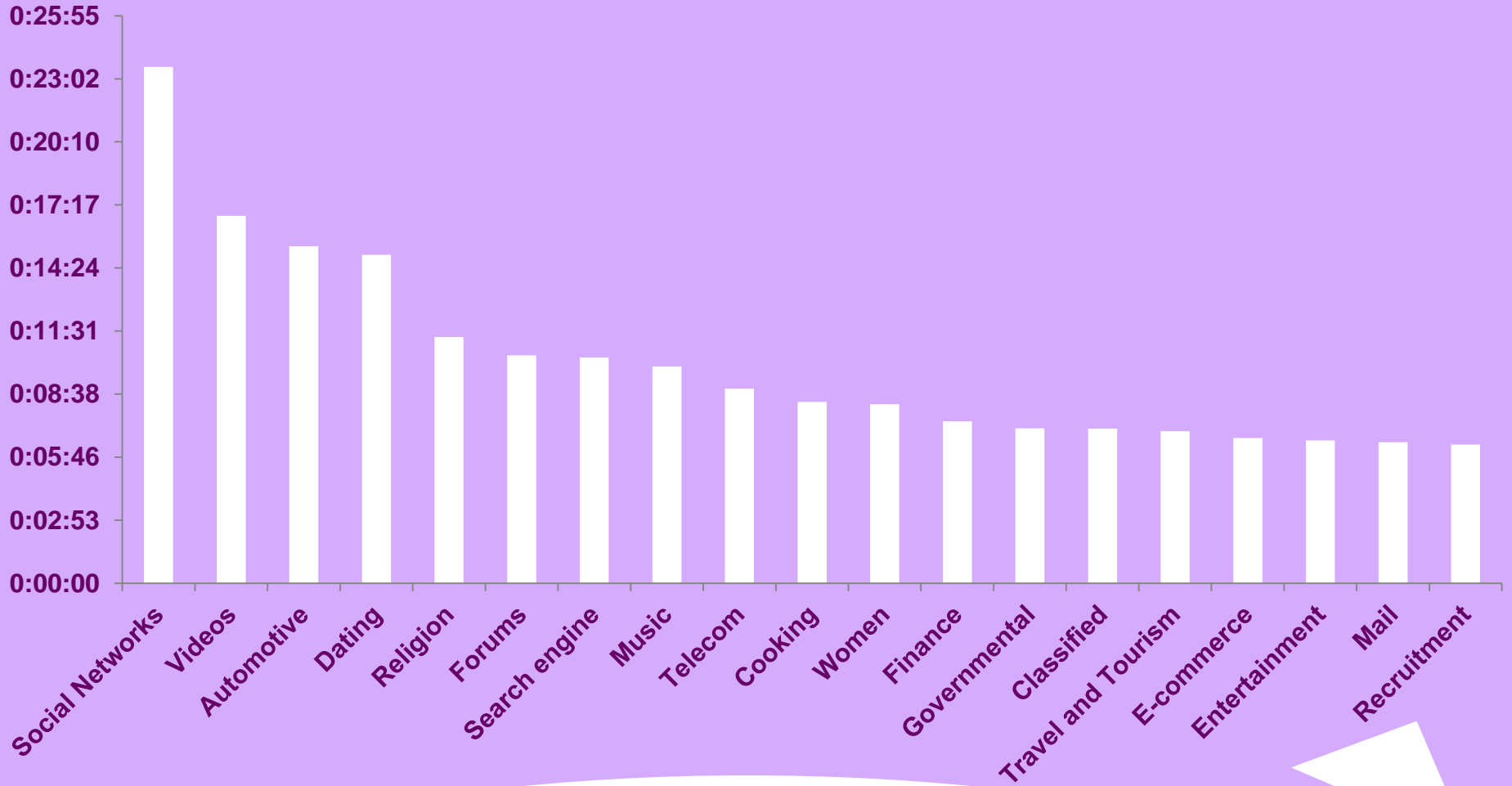


Top 20 websites categories – Visits

Avg. Time Spent per Visit



Hh:mm:ss



Top 20 websites categories — Time spent per visit

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor





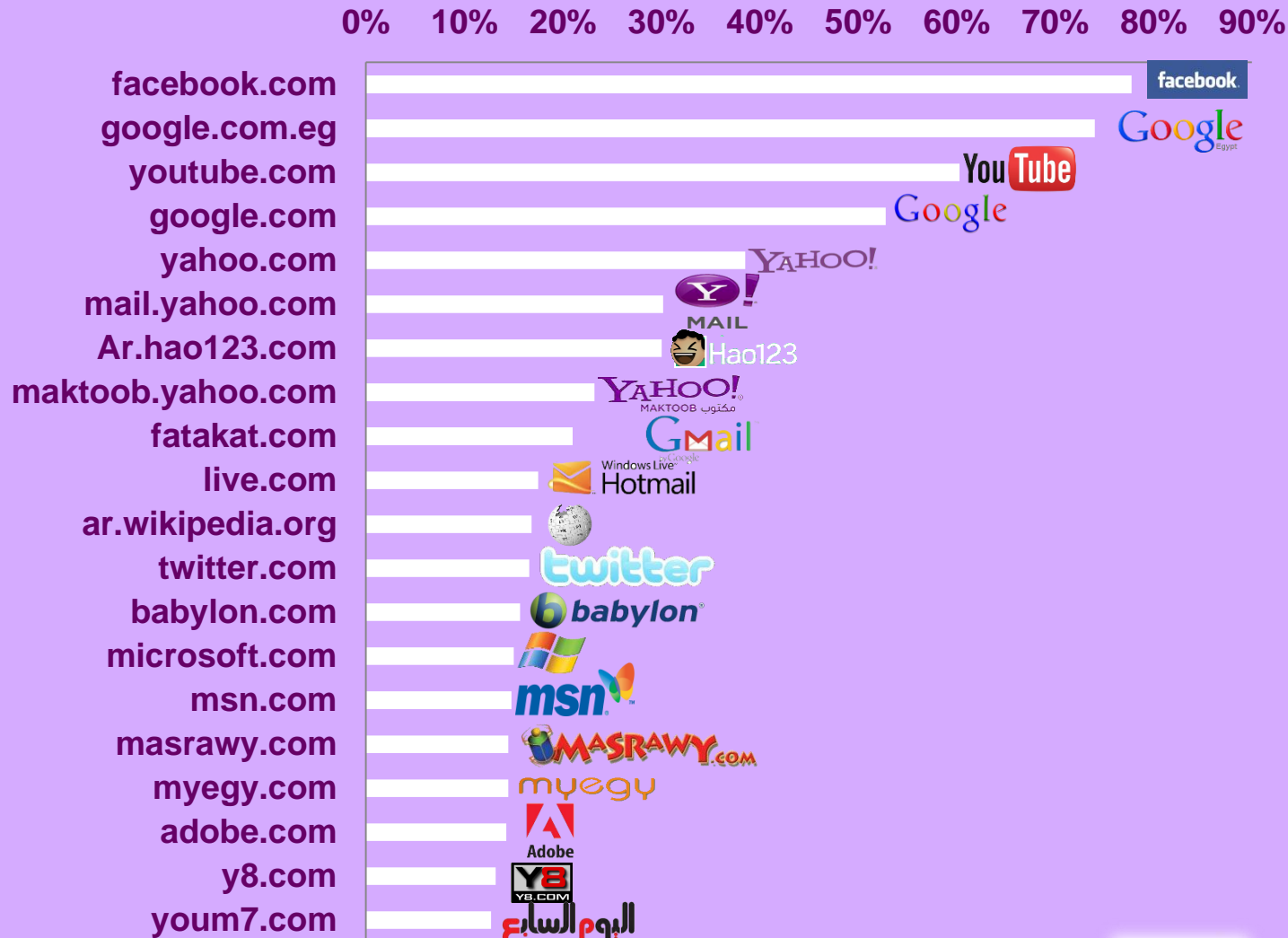
Reach-Internet

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

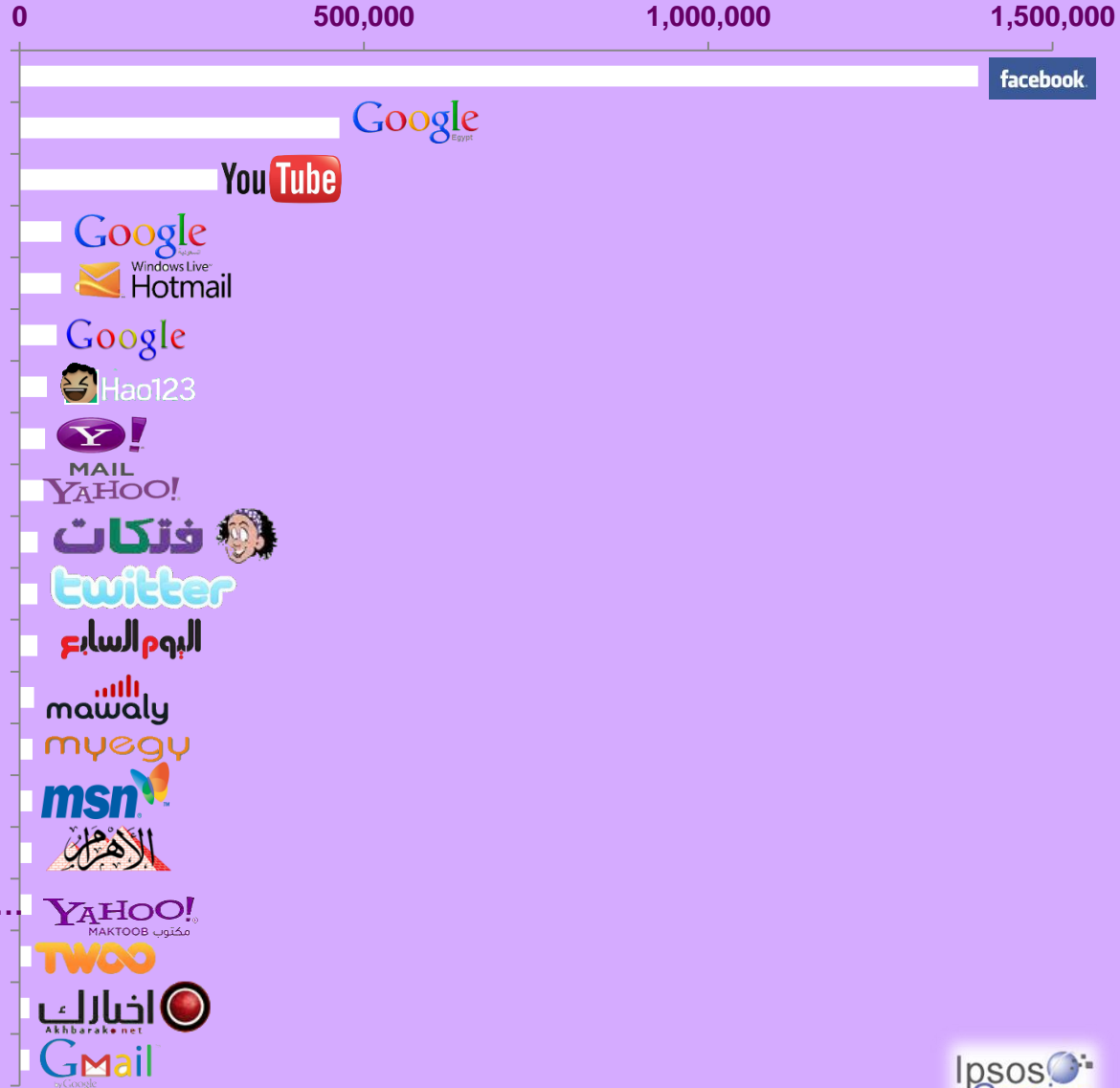
Based on Avg. Time Spent per Visitor



Top 20 Websites



Page Views Thousands



Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

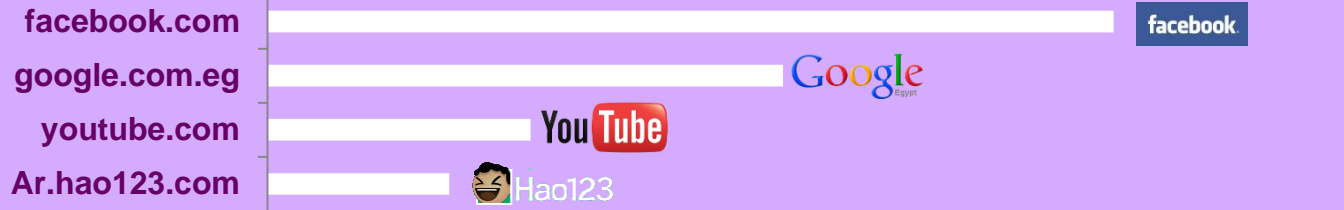
Based on Avg. Time Spent per Visitor

Top 20 Websites



Visits
Thousands

Based on Avg. Monthly Internet Reach



Based on Page Views



Based on No. of Visits



Based on Avg. Time Spent per Visitor





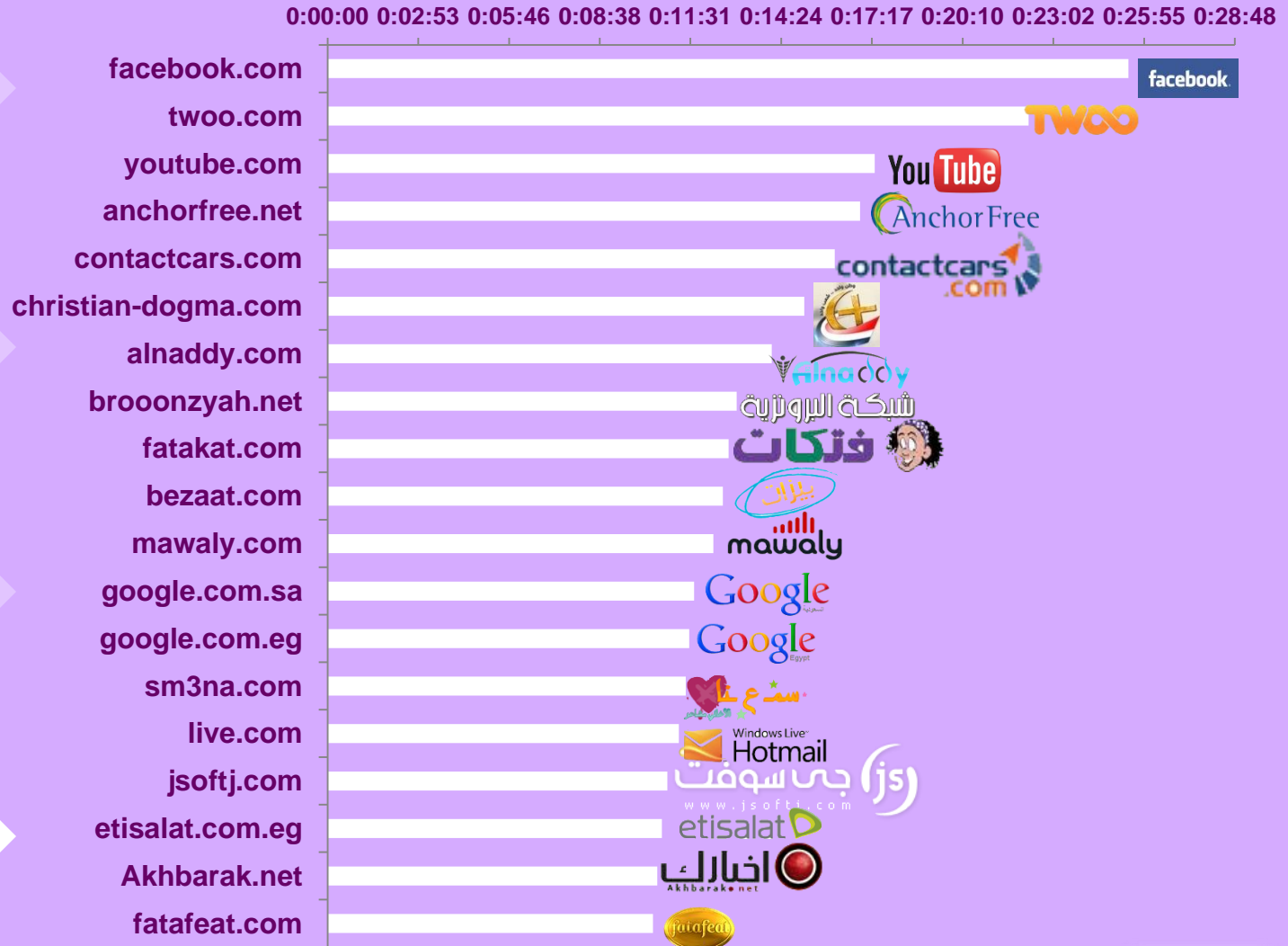
Time Spent per Visit Hh:mm:ss

Based on Avg. Monthly Internet Reach

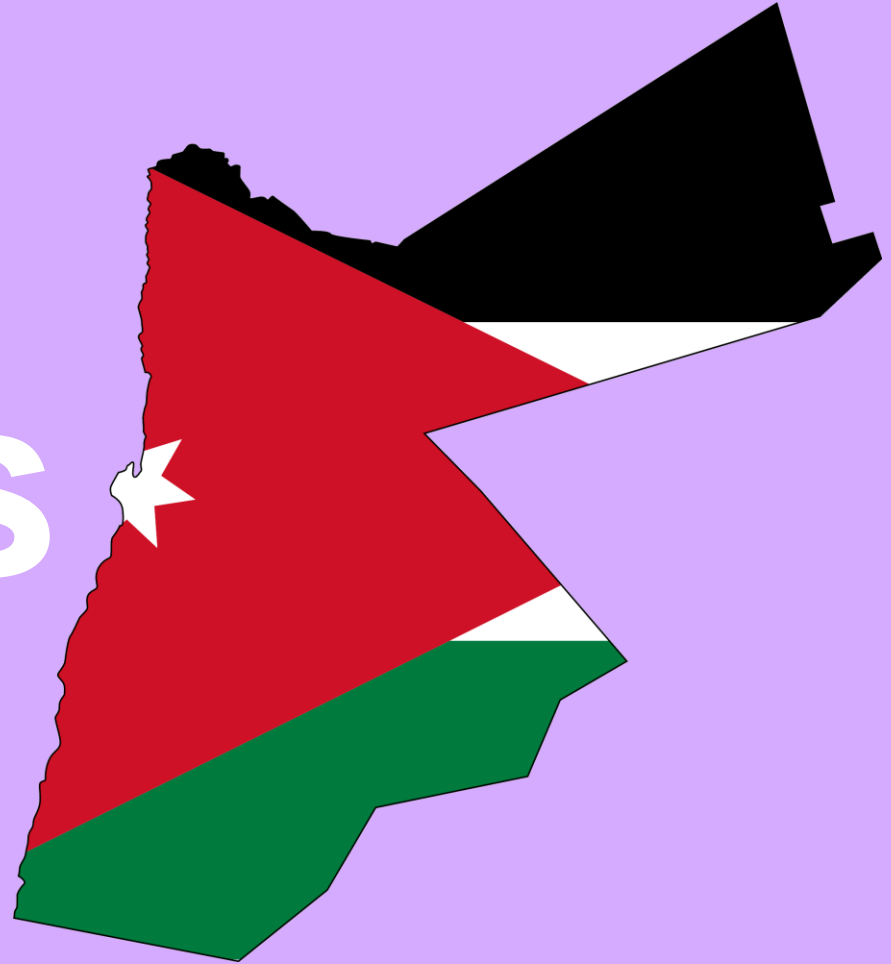
Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor



Jordan Ratings

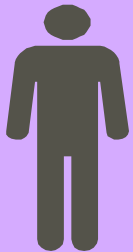


Internet Breakdown - Jordan



1.9 Million Internet Population

48% Internet Penetration



60%
Males



40%
Females



43% from 20-30 years old

29% from 15-19 years old

17% from 31-40 years old

11% from 40+ years old

Country Flavor - Overview



Highest reach of social networking websites is in Jordan.



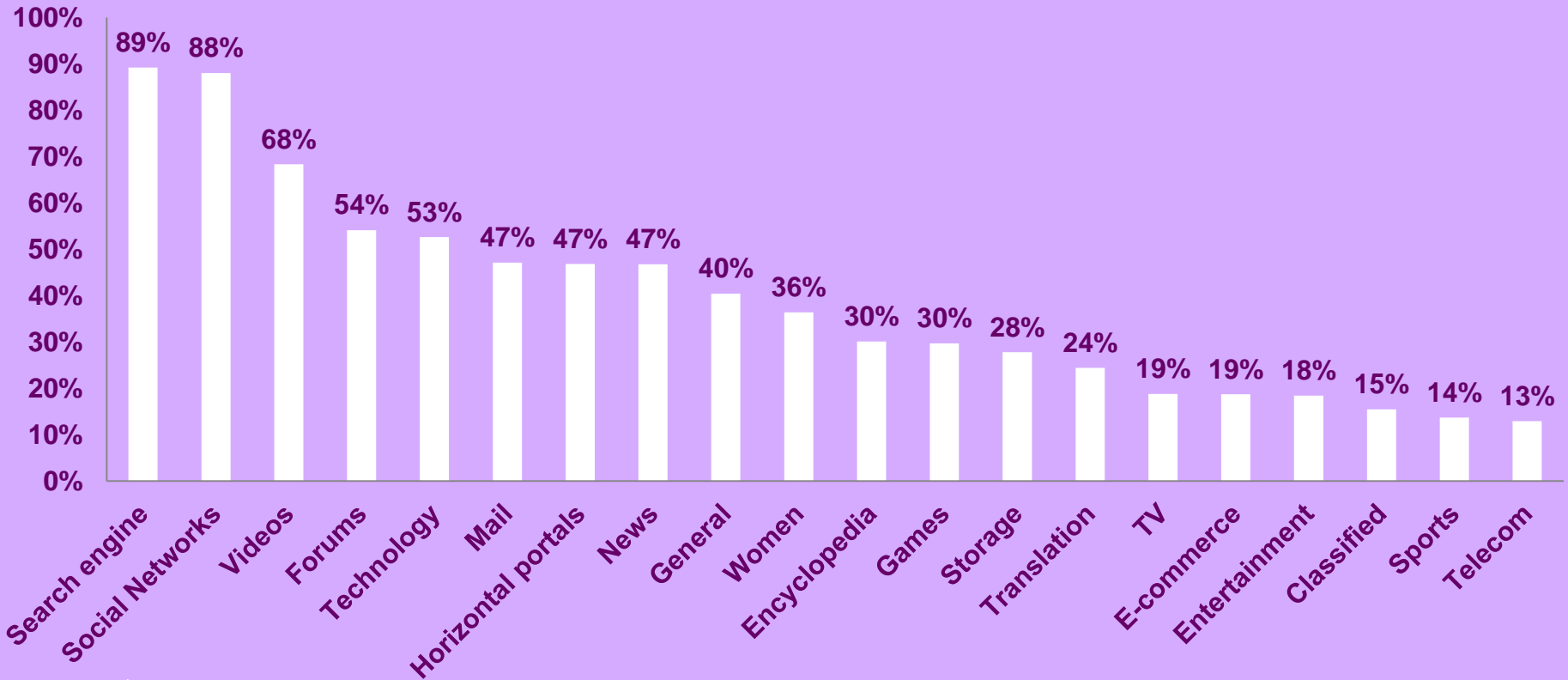
Highest reach & time spent per visit for games websites is in Jordan



Highest reach & time spent per visit for news websites is in Jordan



Top 20 websites categories

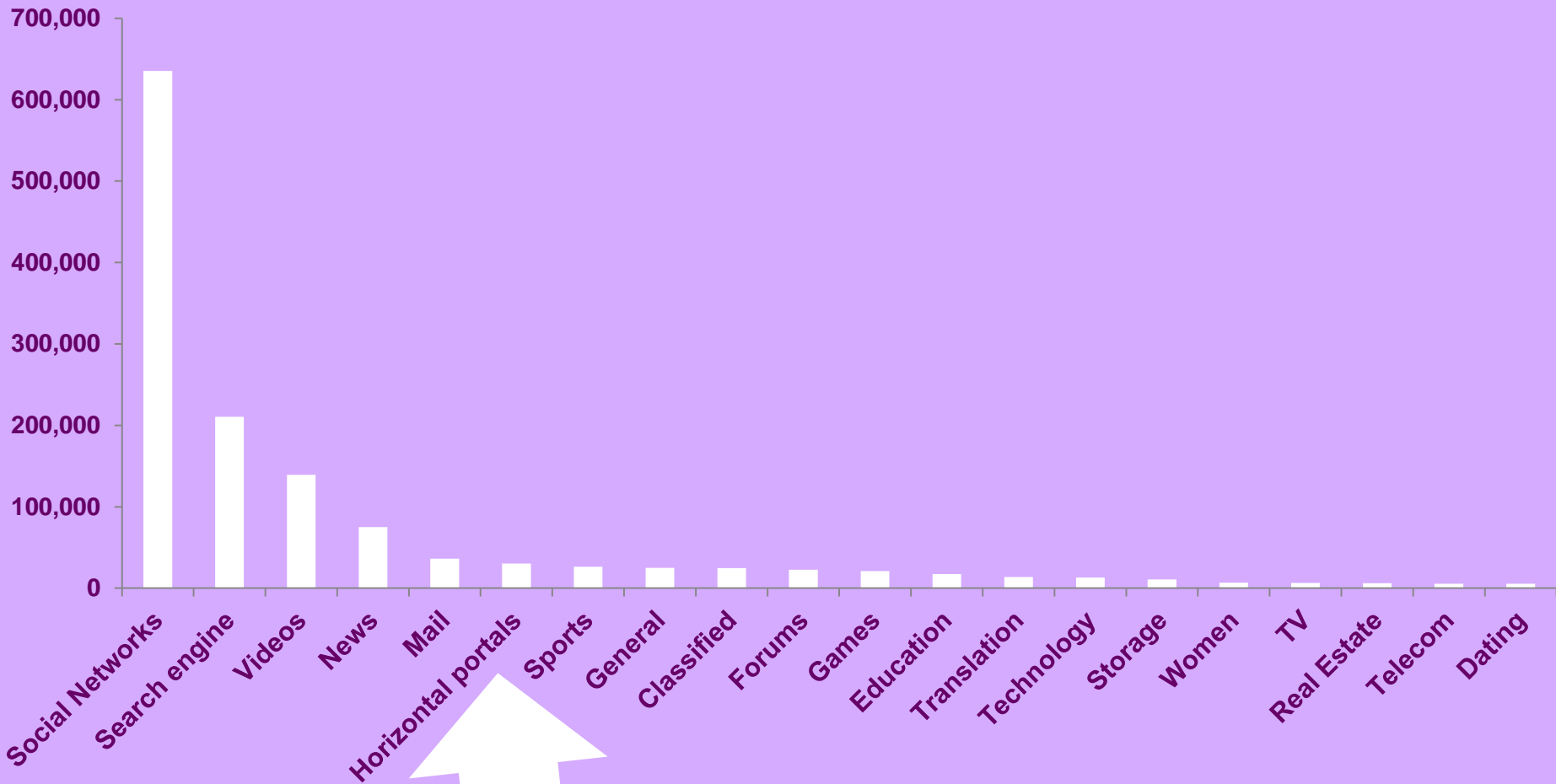


Top 20 websites categories – Internet Reach

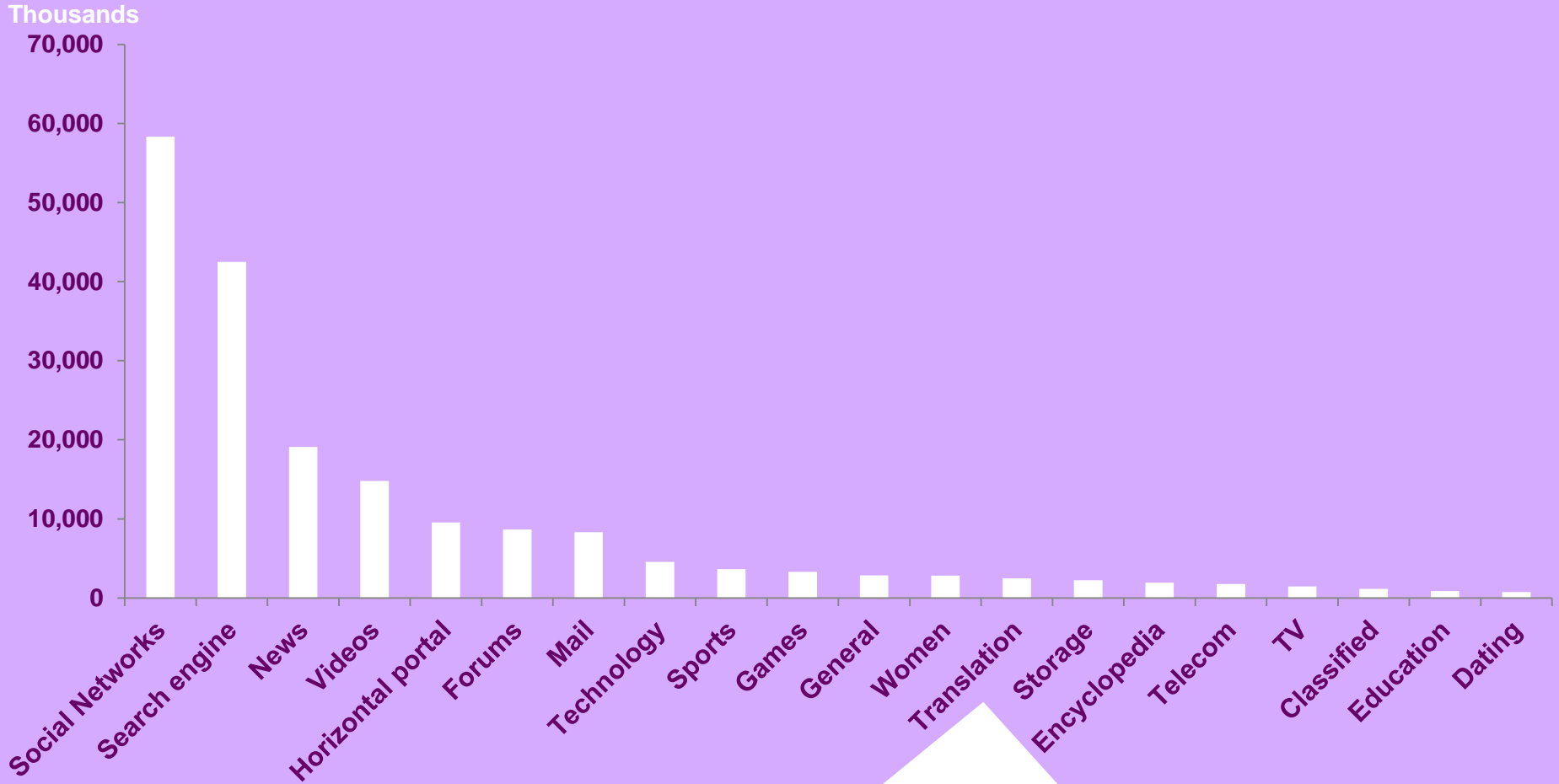


Thousands

Page Views



Top 20 websites categories – Page Views



Top 20 websites categories – Visits

Avg. Time Spent per Visit



Hh:mm:ss



Top 20 websites categories — Time spent per visit

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor





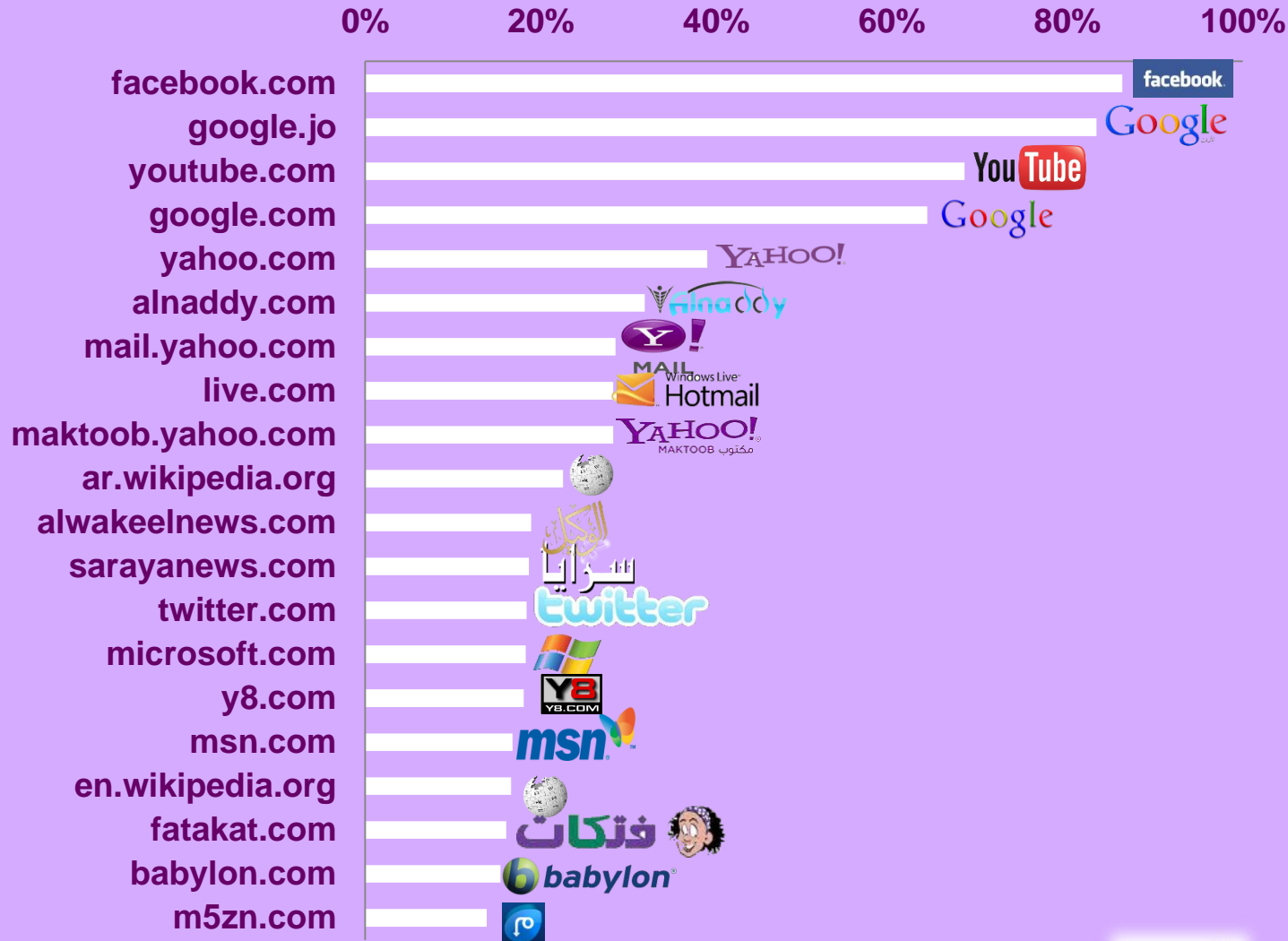
Reach-Internet

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

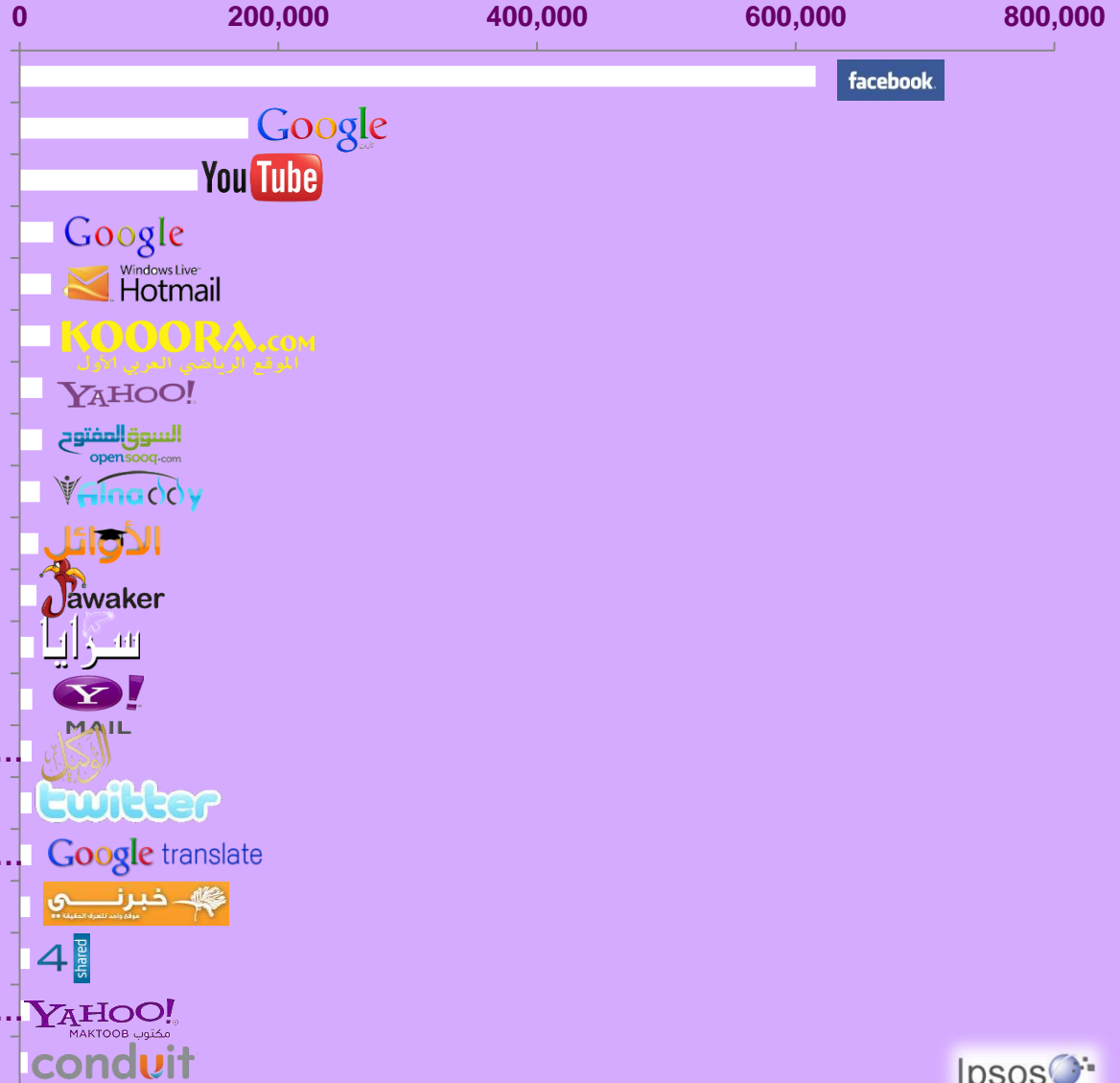
Based on Avg. Time Spent per Visitor



Top 20 Websites



Page Views Thousands



Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

Top 20 Websites



Visits Thousands



Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

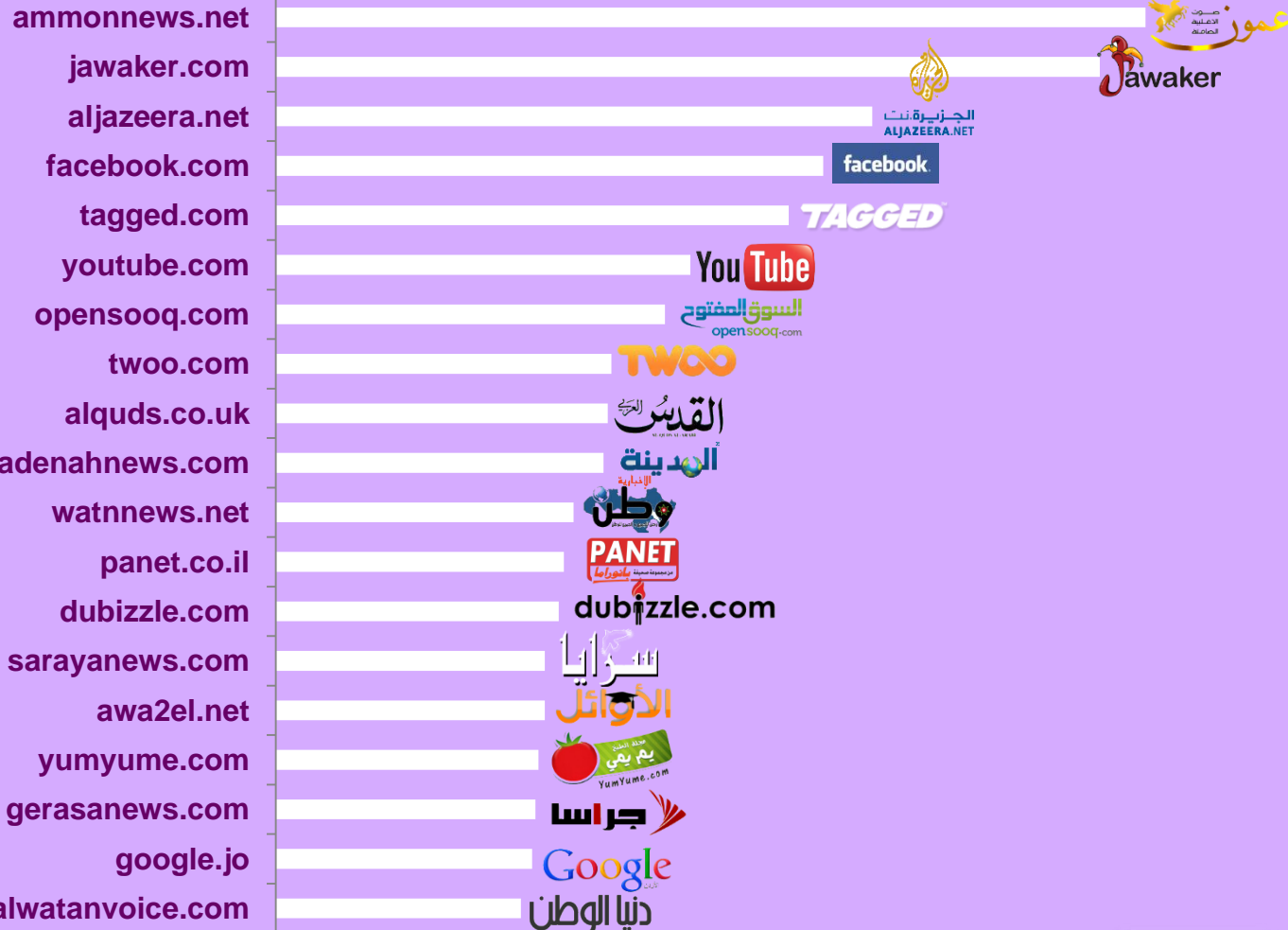
Based on Avg. Time Spent per Visitor



Time Spent per Visit Hh:mm:ss

0:00:00 0:07:12 0:14:24 0:21:36 0:28:48 0:36:00 0:43:12

Based on Avg. Monthly Internet Reach



Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

UAE Ratings

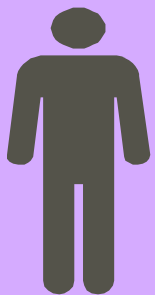


Internet Breakdown - UAE

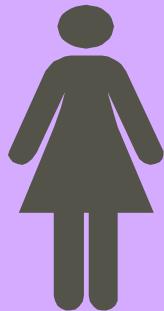


4.7 Million Internet Population

71% Internet Penetration

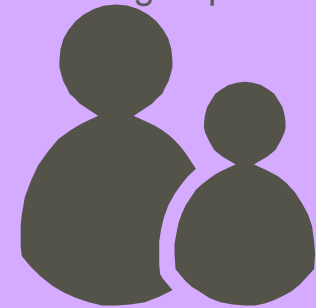


72%
Males



28%
Females

Nationalities
grouped



54% Expats

29% Arabs

17% Emirati



38% from 20-30 years old

31% from 31- 40 years old

23% from 40+ years old

8% from 15-19 years old



E-mail consumption has the highest **reach, page views, visits, and time spent per visit** in UAE compared to other countries.



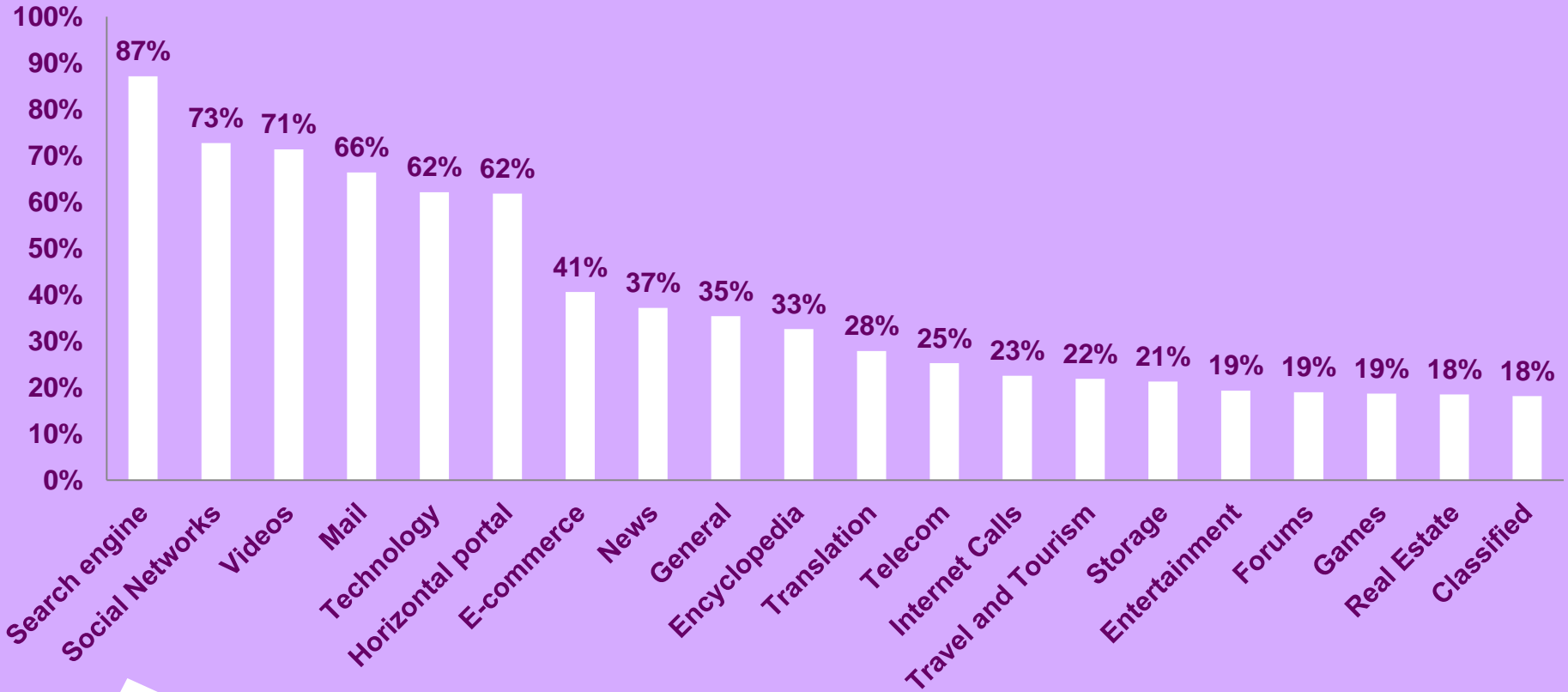
Business related websites has the highest **reach, page views, visits, and time spent per visit** compared to other countries.



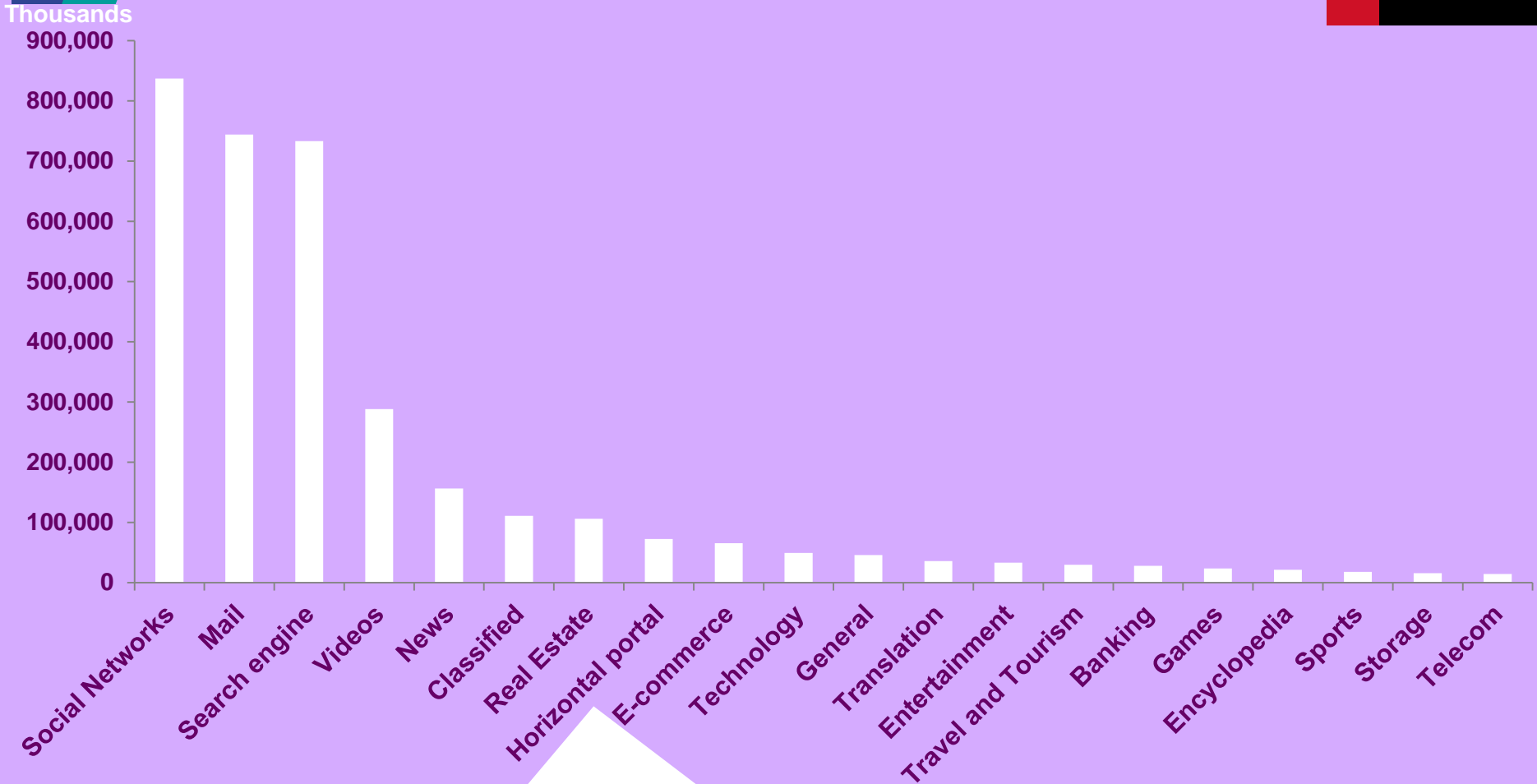
Real estate websites has the highest **reach, page views, visits, and time spent per visit** compared to other countries.



Top 20 websites categories

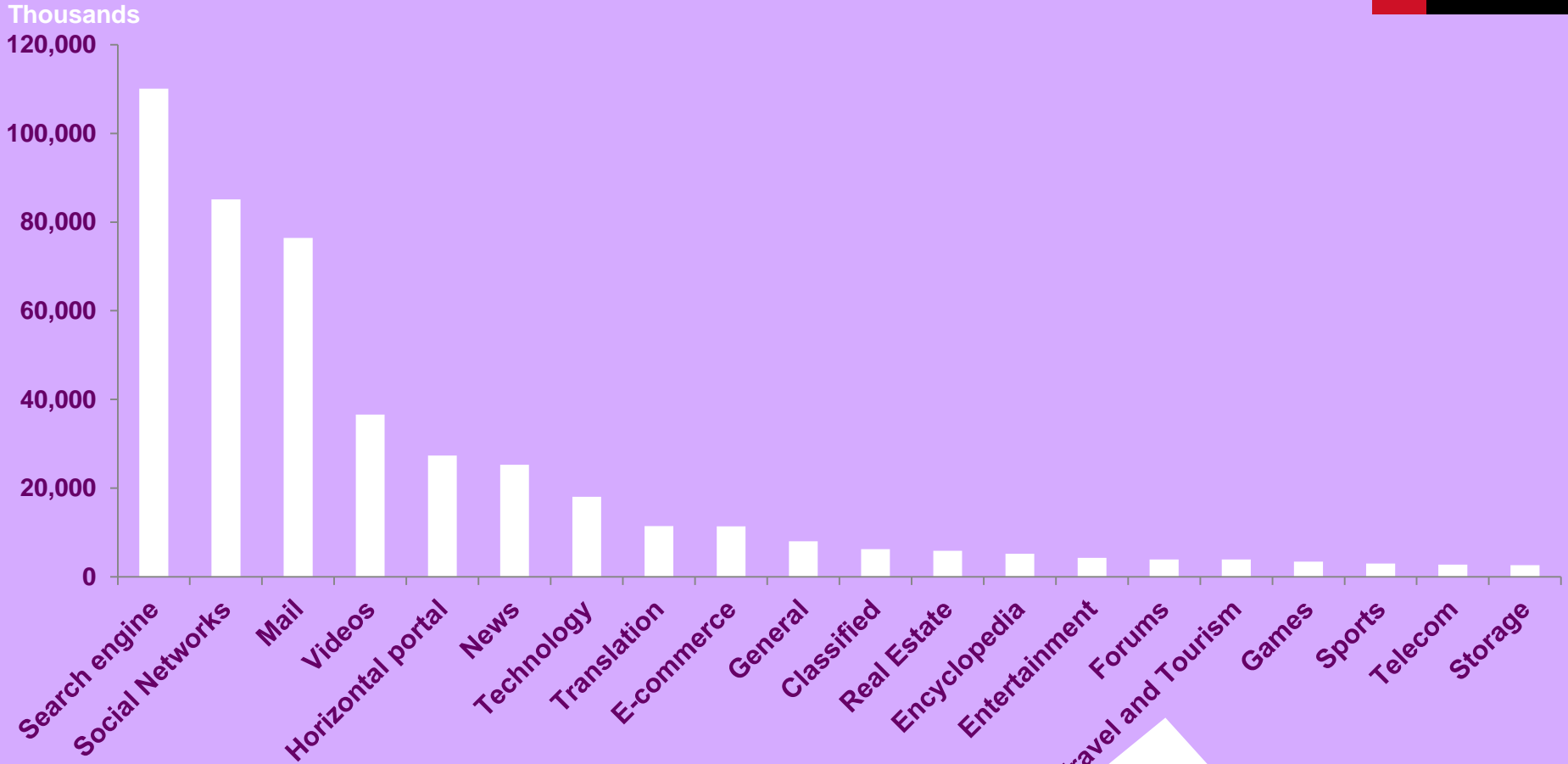


Top 20 websites categories – Internet Reach



Top 20 websites categories – Page Views

Number of Visits



Top 20 websites categories – Visits

Avg. Time Spent per Visit



Hh:mm:ss



Top 20 websites categories — Time spent per visit

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor





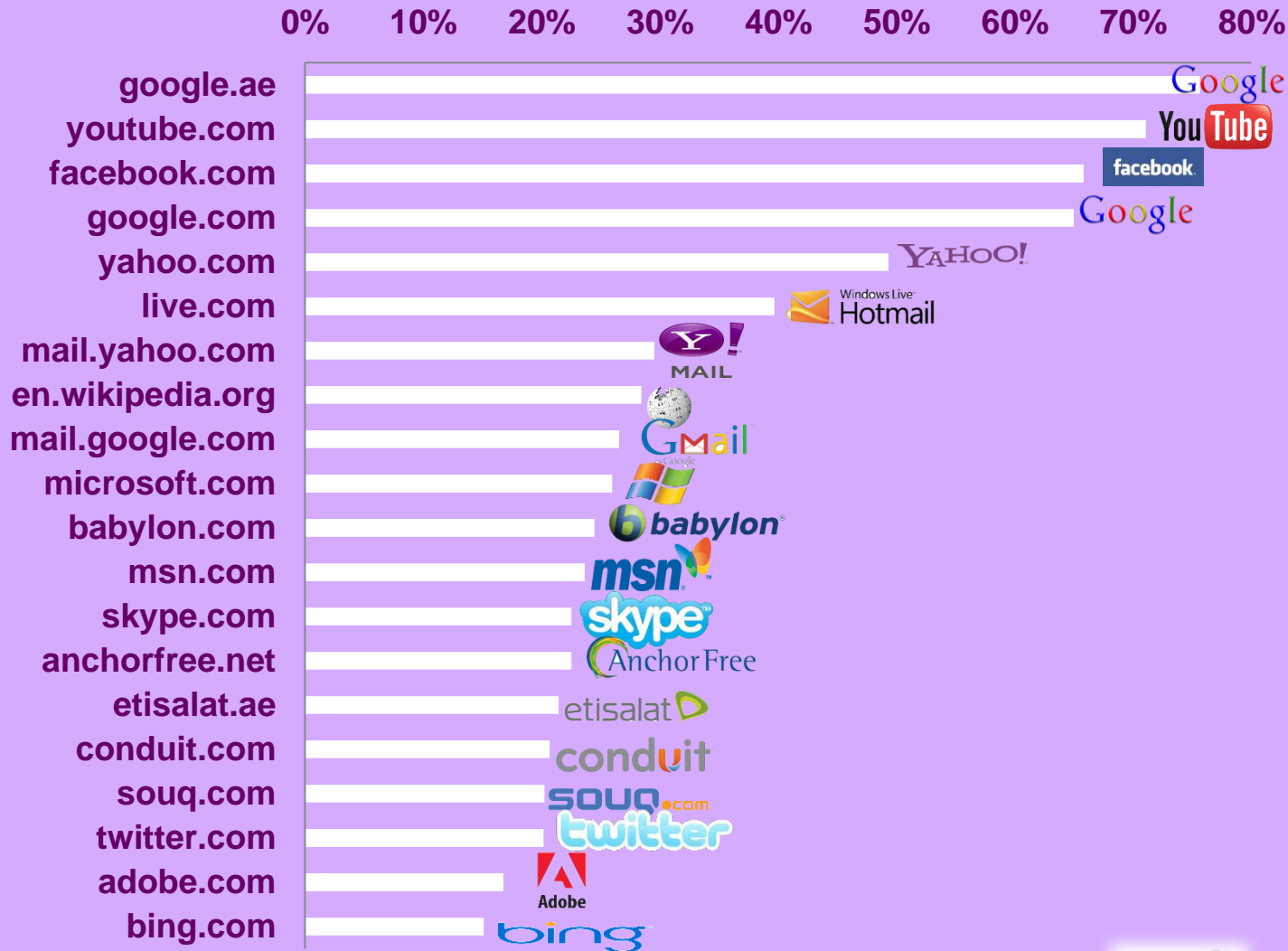
Reach-Internet

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

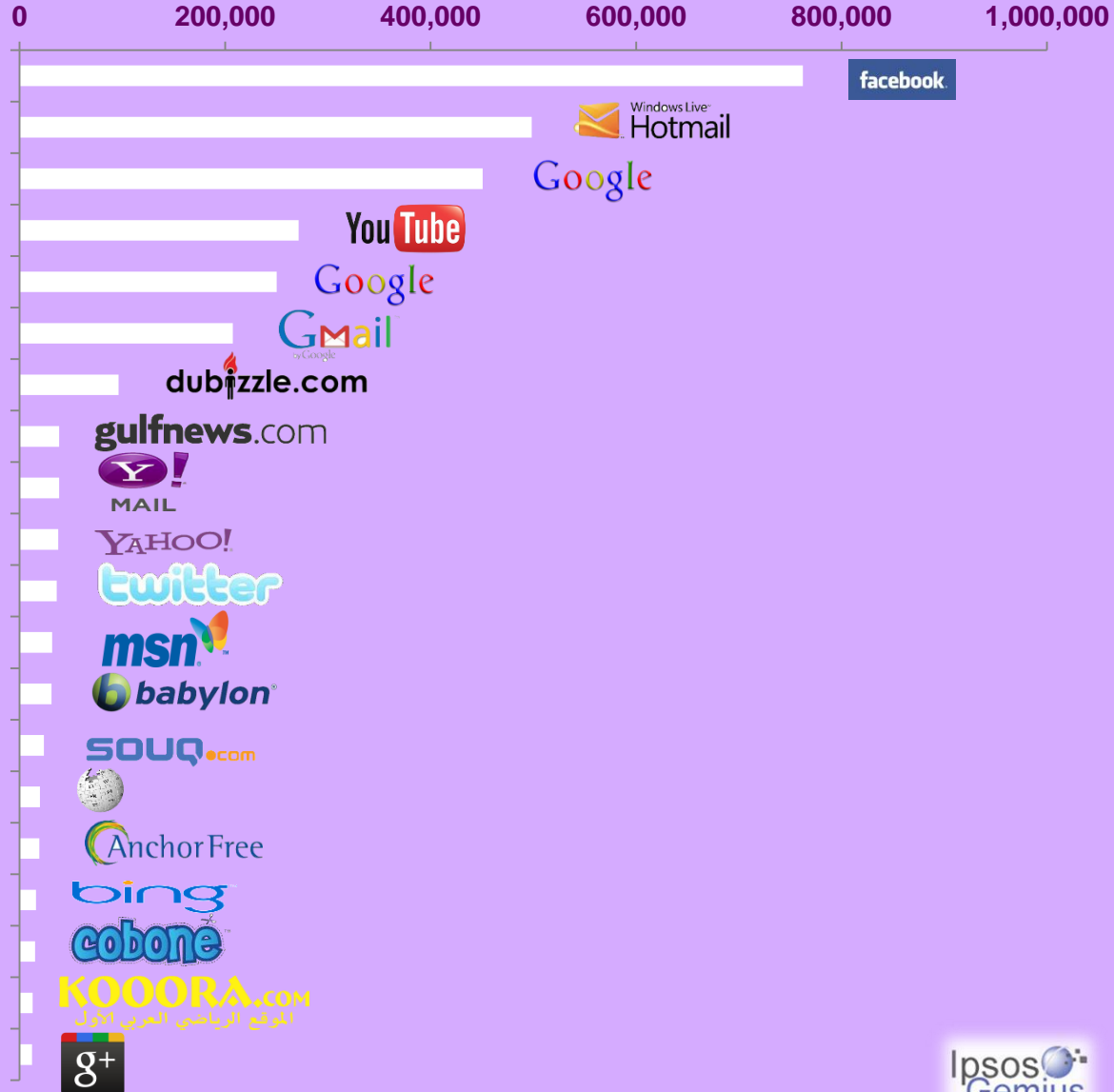
Based on Avg. Time Spent per Visitor



Top 20 Websites



Page Views Thousands



Based on Avg. Monthly Internet Reach

Based on Page Views

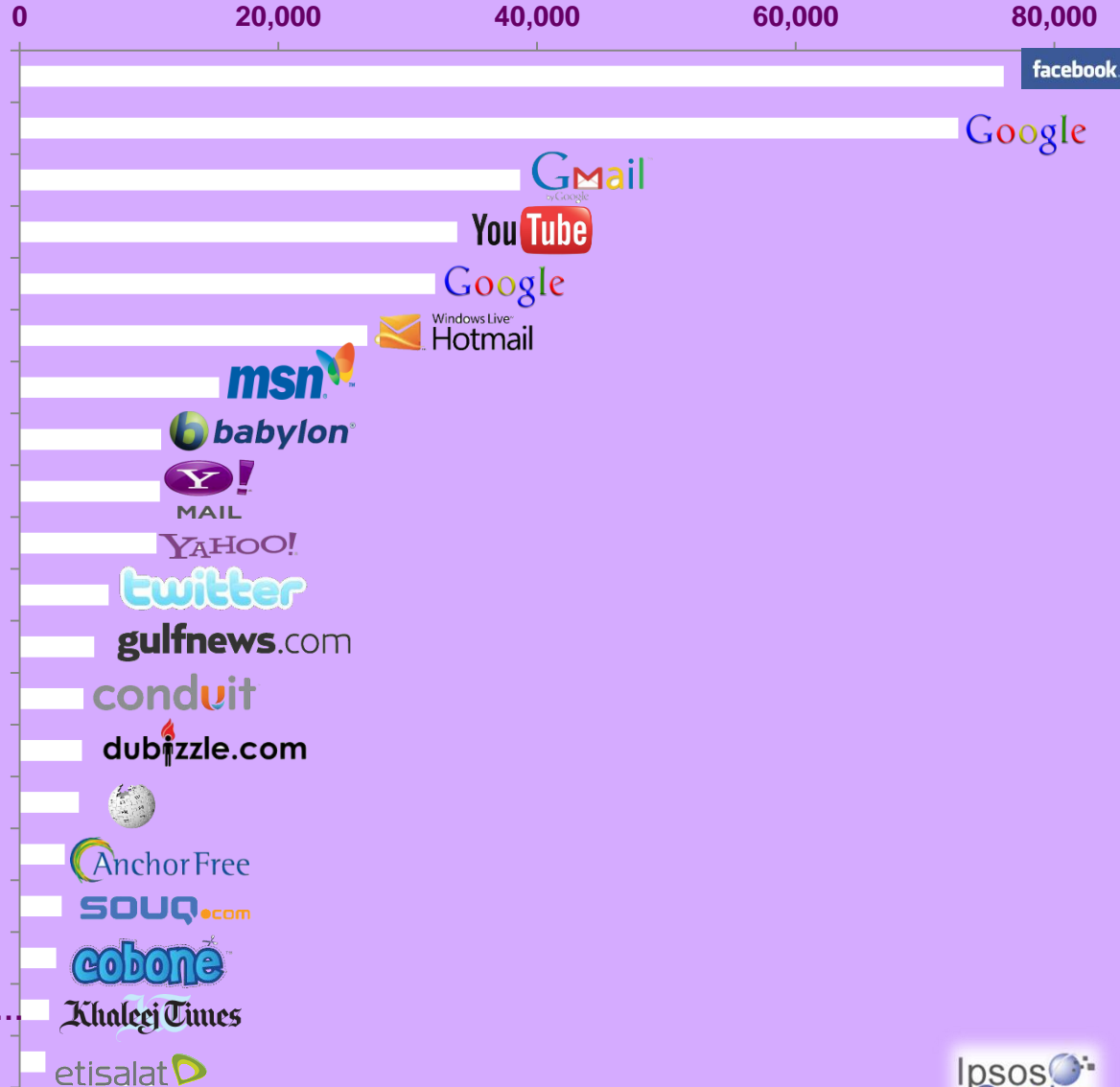
Based on No. of Visits

Based on Avg. Time Spent per Visitor

Top 20 Websites



Visits
Thousands



Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

Top 20 Websites



Time Spent per Visit

Hh:mm:ss

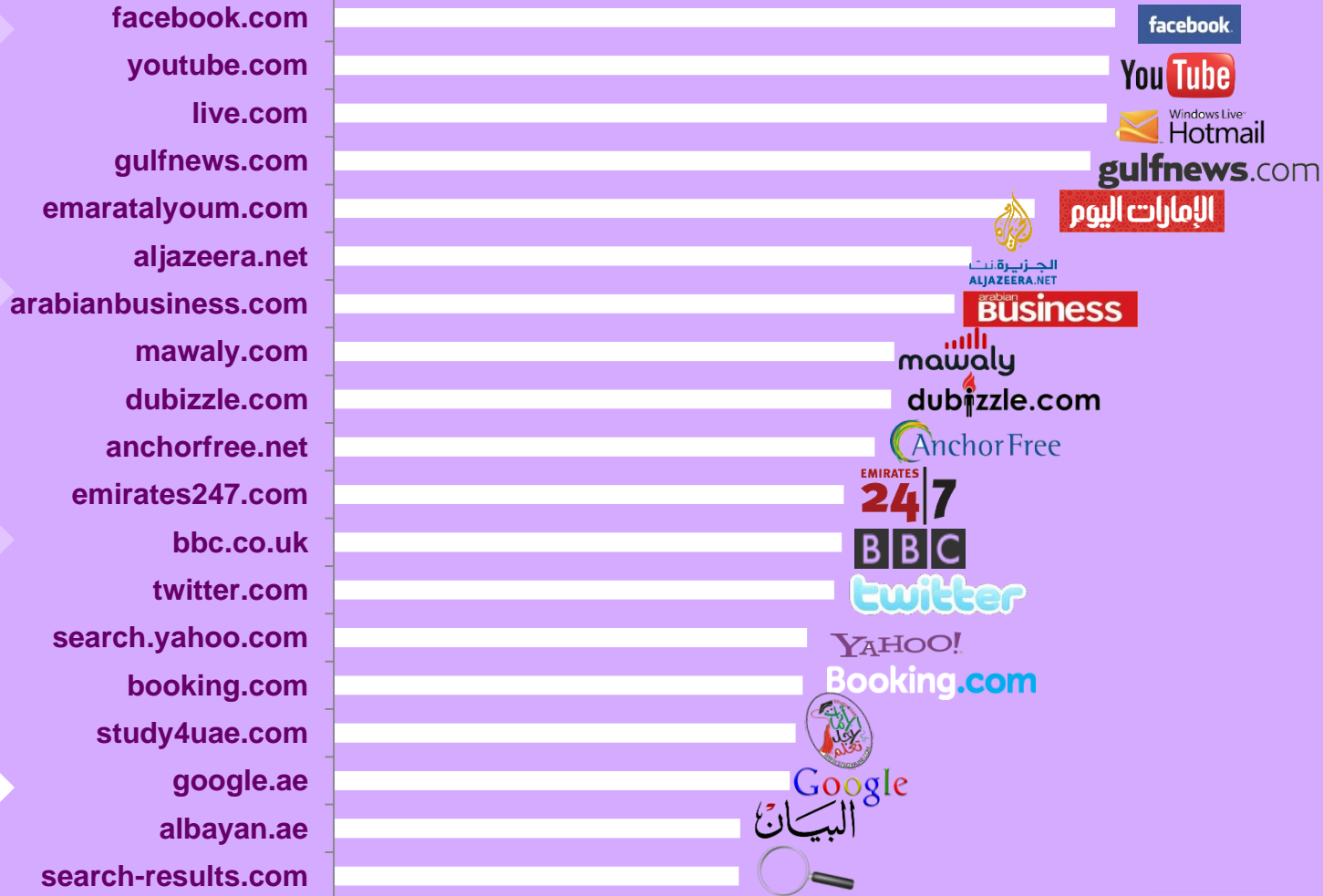
0:00:00 0:02:53 0:05:46 0:08:38 0:11:31 0:14:24 0:17:17 0:20:10

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor



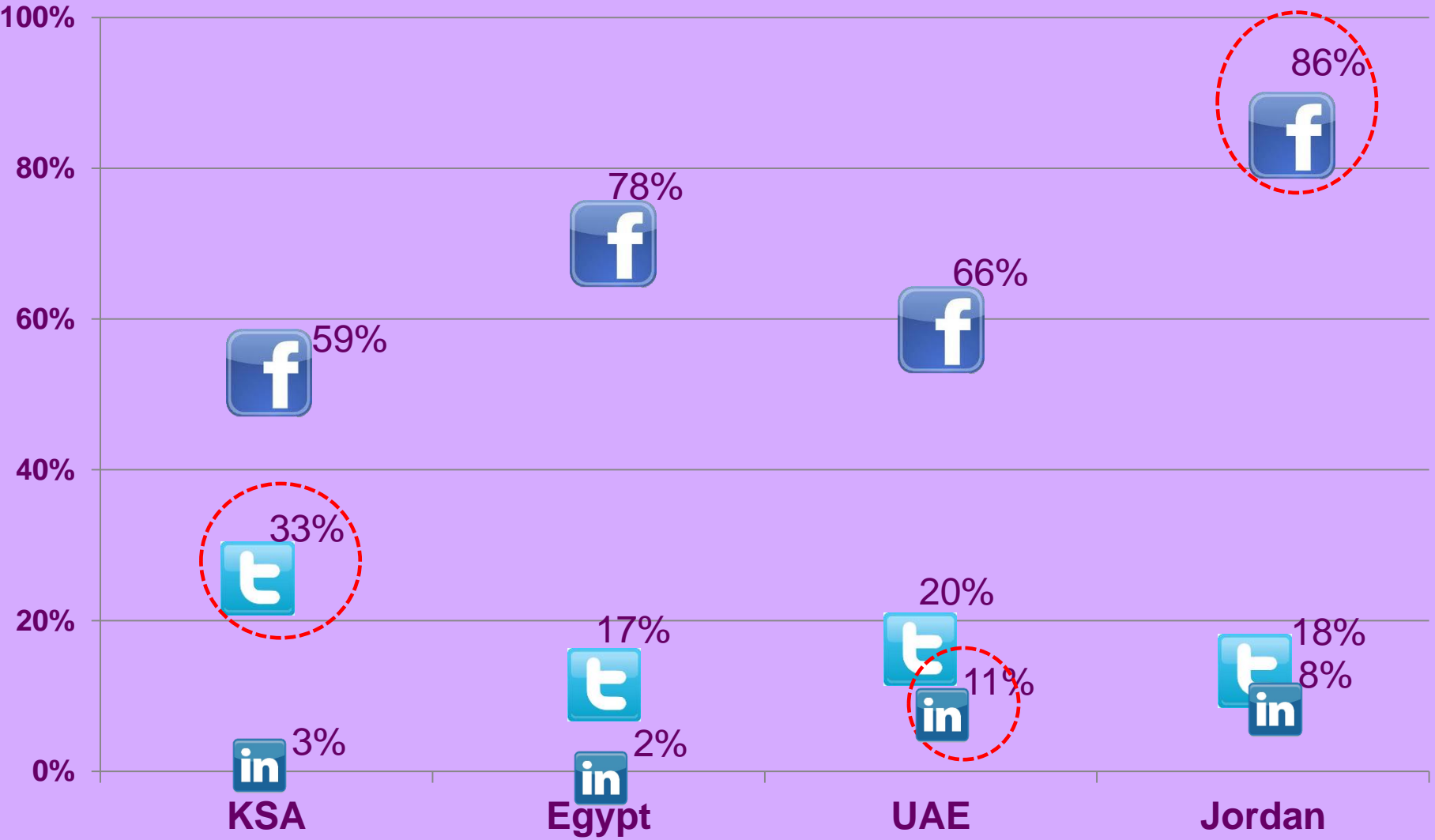
In-depth Data



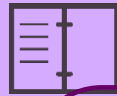


Consumed Social Media Platforms Among Internet Users

Avg. monthly reach



Top News Websites — Ranked based on avg. Monthly Internet reach



KSA

sabq.org		20%
alriyadh.com		12%
burnews.com		11%
okaz.com.sa		9%



Jordan

alwakeelnews.com		19%
sarayanews.com		19%
jfranews.com		12%
alrai.com		11%



Egypt

masrawy.com		14%
youth7.com		13%
ahram.org.eg		10%
elfagr.org		8%





UAE

gulfnews.com		14%
huffingtonpost.com		9%
bbc.co.uk		5%
khaleejtimes.com		4%

Top E - Commerce Websites — *Ranked based on avg. Monthly Internet reach*

UAE



souq.com		20%
cobone.com		13%
amazon.com		11%
Markavip.com		9%

KSA



souq.com		13%
sukar.com		8%
namshi.com		7%
Markavip.com		5%

Egypt



souq.com		10%
jumia.com		7%
alibaba.com		4%
amazon.com		4%

Jordan



markavip.com		9%
amazon.com		6%
alibaba.com		4%
ebay.com		2%

Top Videos Websites — *Ranked based on avg. Monthly Internet reach*



KSA

youtube.com		71%
dardarkom.com		6%
dailymotion.com		4%
imdb.com		3%



UAE

youtube.com		71 %
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Egypt



y8.com		13%
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KSA



travian.com.sa		12%
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UAE



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