

Media consumption & habits of MENA Internet users

*Research conducted by Effective Measure
in conjunction with Spot On PR*

July 2010



Key findings

- **MENA Internet users spend more time online than watching TV.**
 - 88% of those surveyed stated that they access the Internet daily, whereas 71% of those surveyed stated that they watched television daily.
- **The Internet retains a substantial audience throughout the day and night, while traditional media show peak periods for consumption.**
 - 28% more respondents watched TV during peak viewing hours than when viewership is at its lowest (7%), whilst more than 20% of respondents use the Internet at any time-period surveyed, peaking at 33% (just 13% higher than the lowest period).
- **Email and social networking are the most popular activities for MENA Internet users.**
 - Respondents cited email as the activity they most often carried out online (73%), followed by social networking and searching for information online (both were popular with over 40% of respondents).

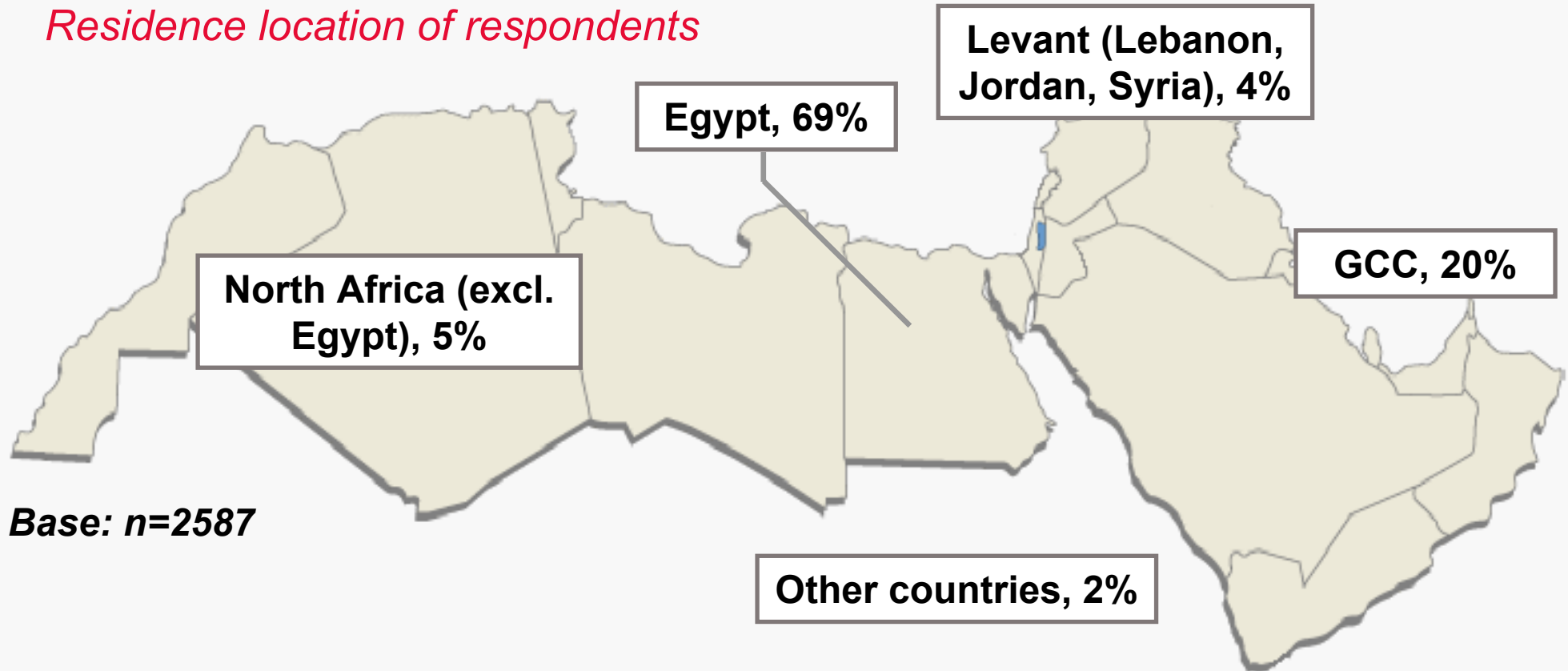
Survey methodology

- The Effective Measure/Spot On PR survey was carried out between July 9th-12th 2010.
- The survey was conducted online via Effective Measure survey technology (active across more than 100 websites in MENA).
- The sample was randomly selected via an intercept invitation which is activated approximately every 15th to 100th visitor to each site (interception rate is linked to the volume to traffic visiting a website).
- No sample quotas were imposed for this survey, the intent was to understand behaviors and attitudes of the general internet population.
- Total sample size was $n=2587$.

Demographics of respondents

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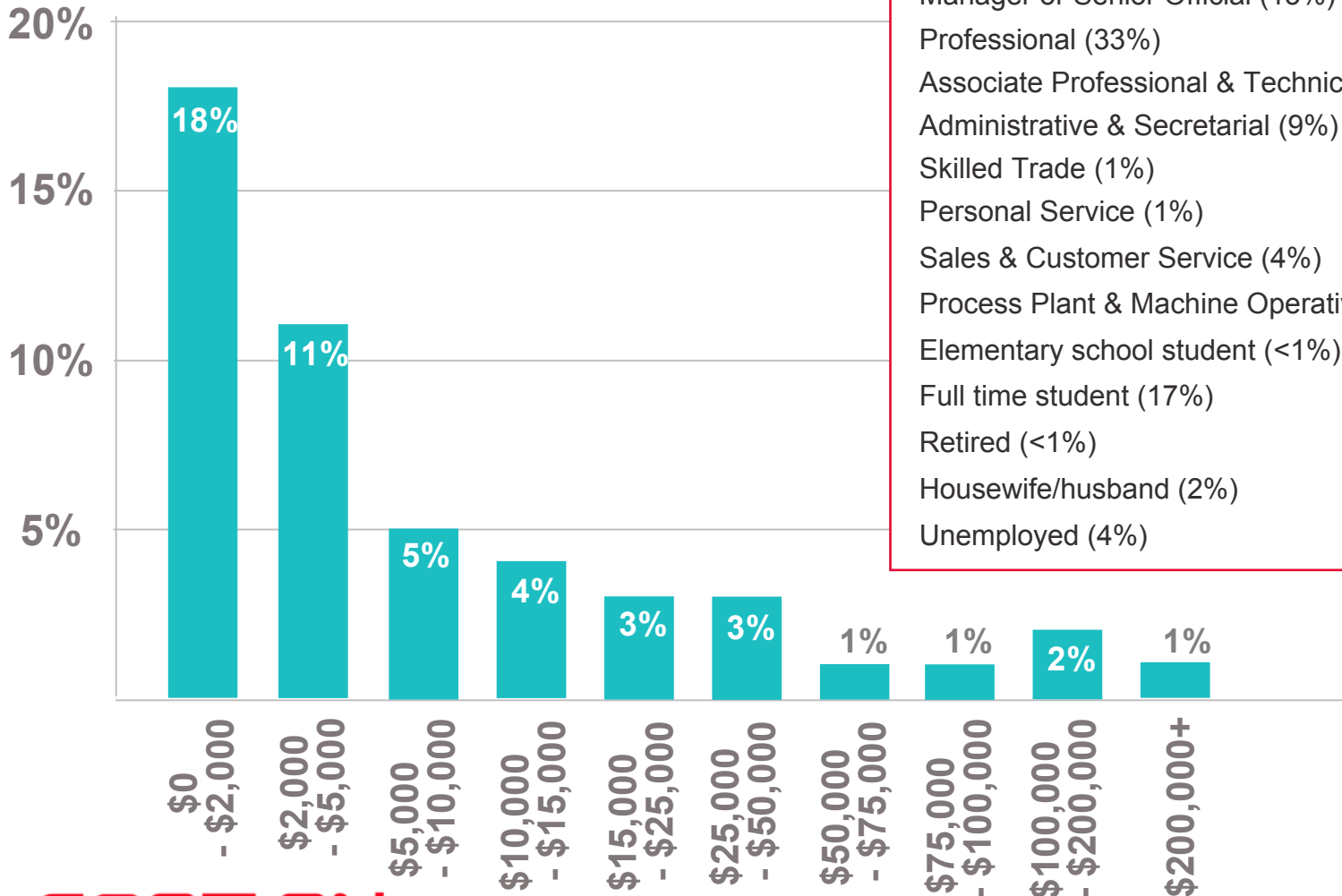
Residence location of respondents



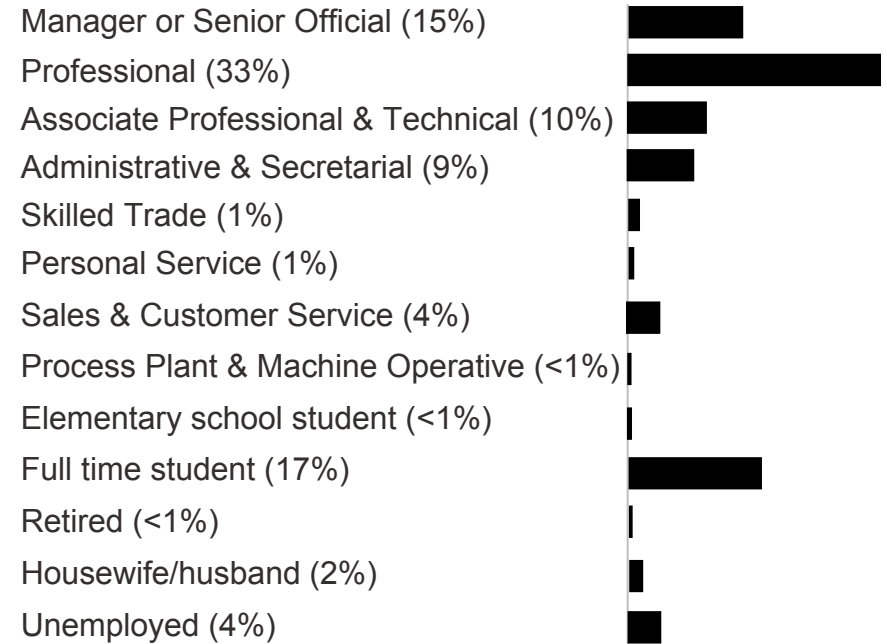
- Note: it should be noted that the sample configuration for the 'MENA' survey is not wholly reflective of country populations and the survey data is unweighted. Egypt does represent a majority of the overall survey sample, however we have found only relatively minor differences in results between regions such as the GCC, North Africa and Levant.

Demographics of respondents

GROSS HOUSEHOLD INCOME (US\$ /YEAR)

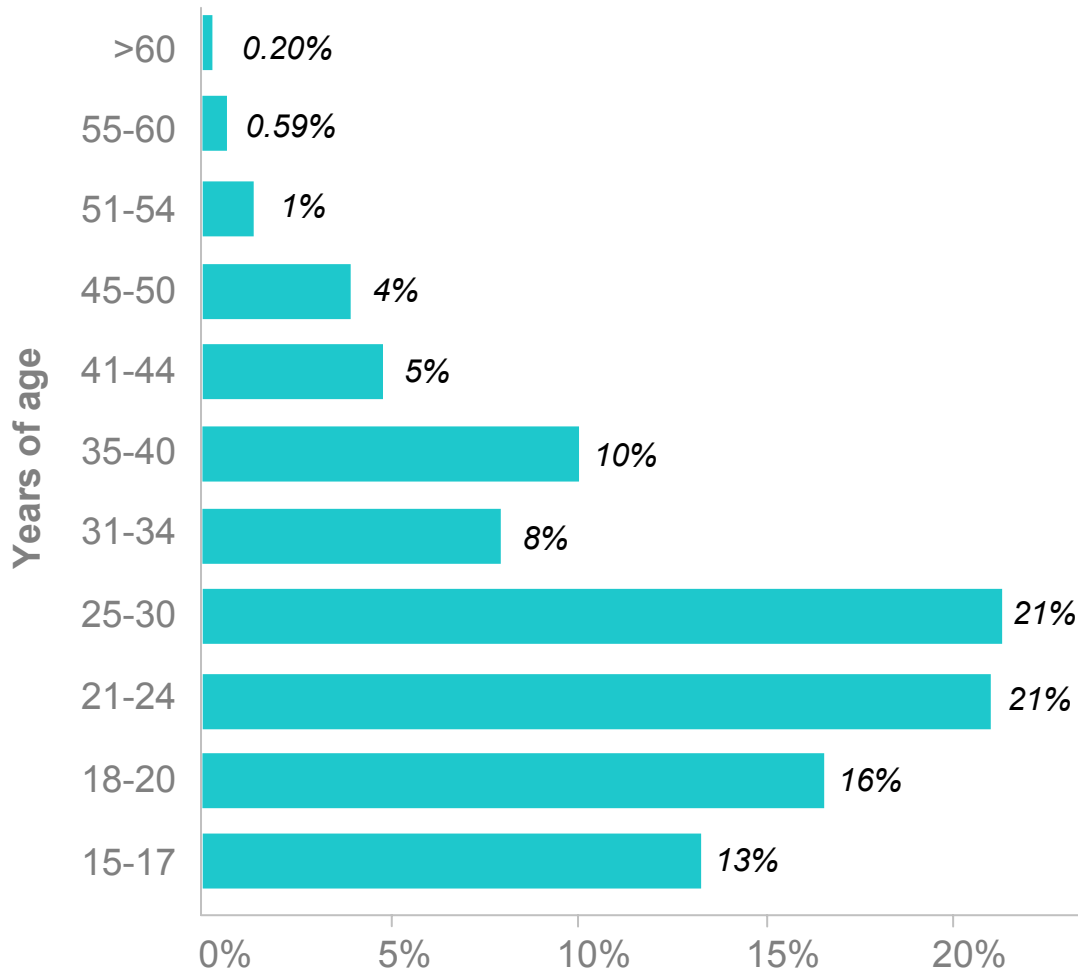


OCCUPATION

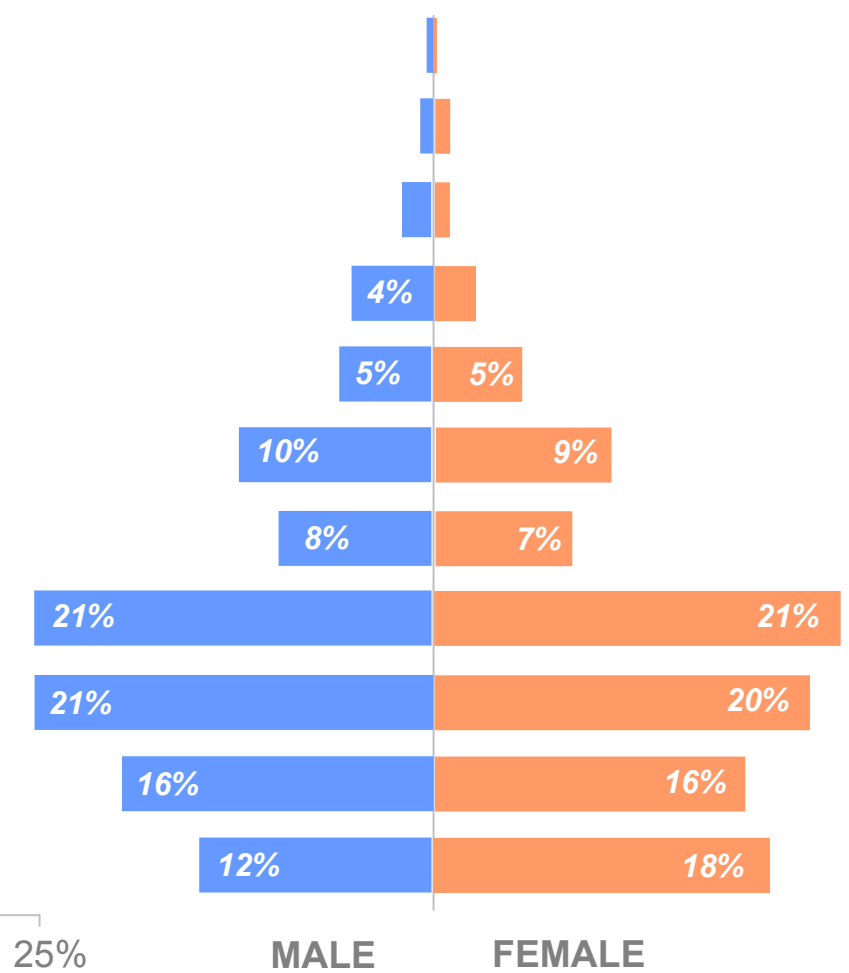


Demographics of respondents

AGE OF RESPONDENTS

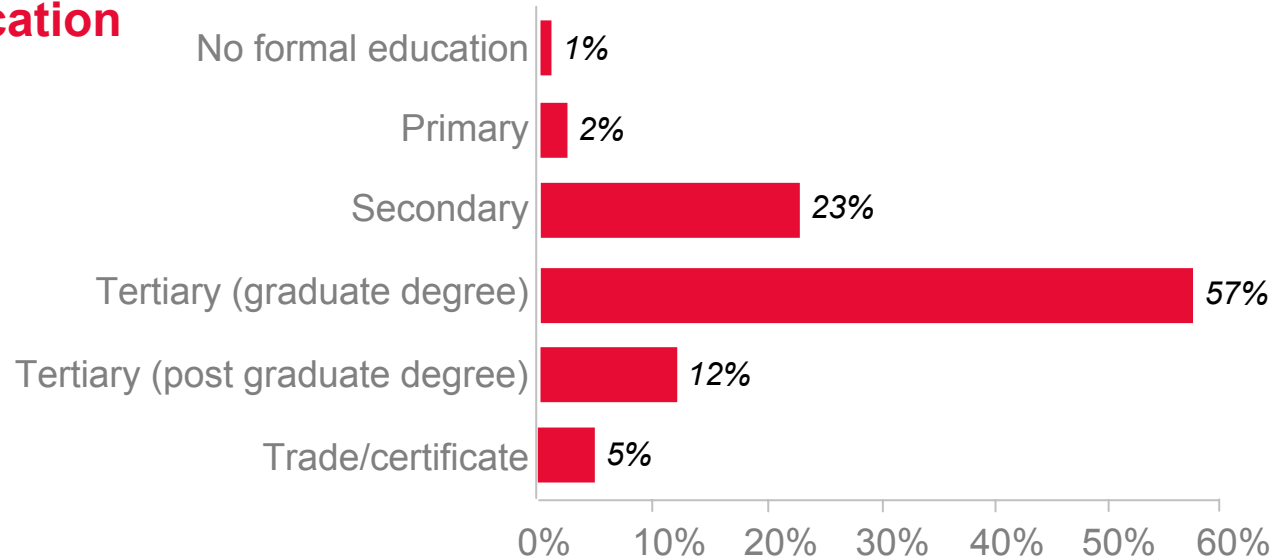


GENDER

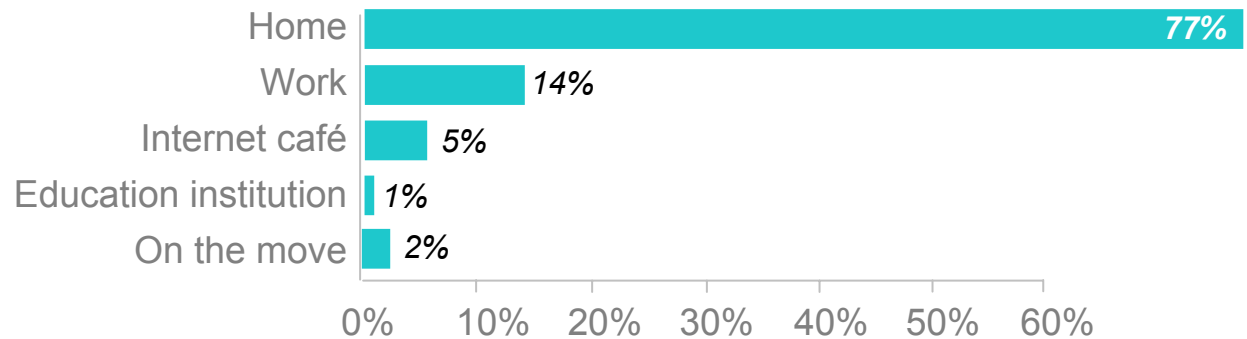


Demographics of respondents

69% of Internet users surveyed have a tertiary education



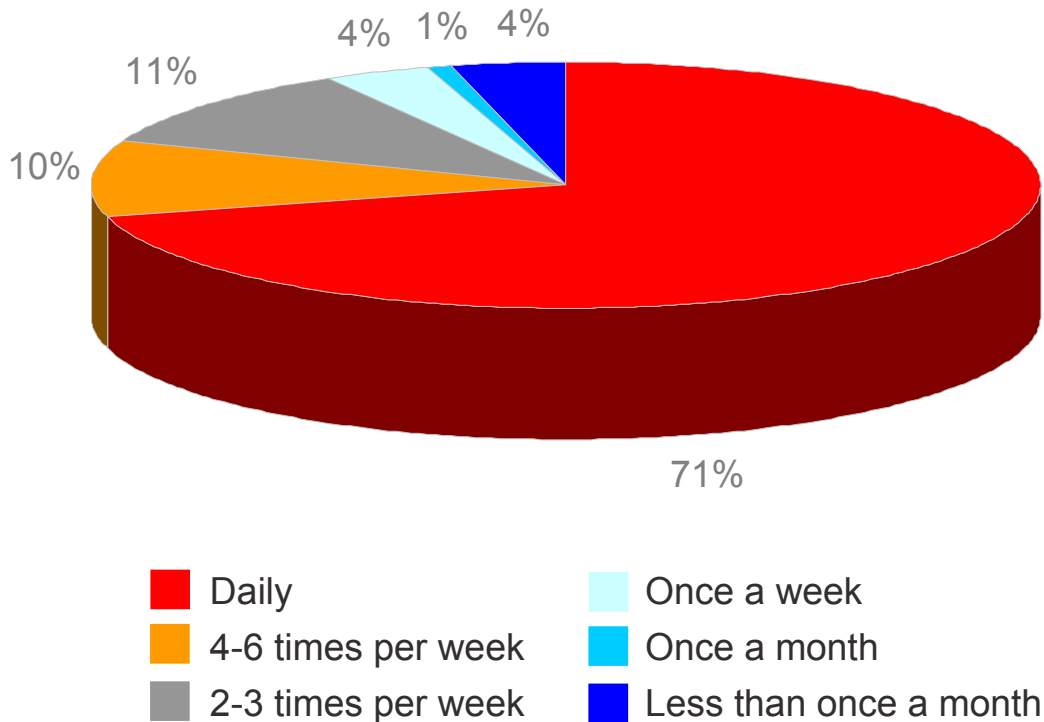
77% of users access the Internet from their homes



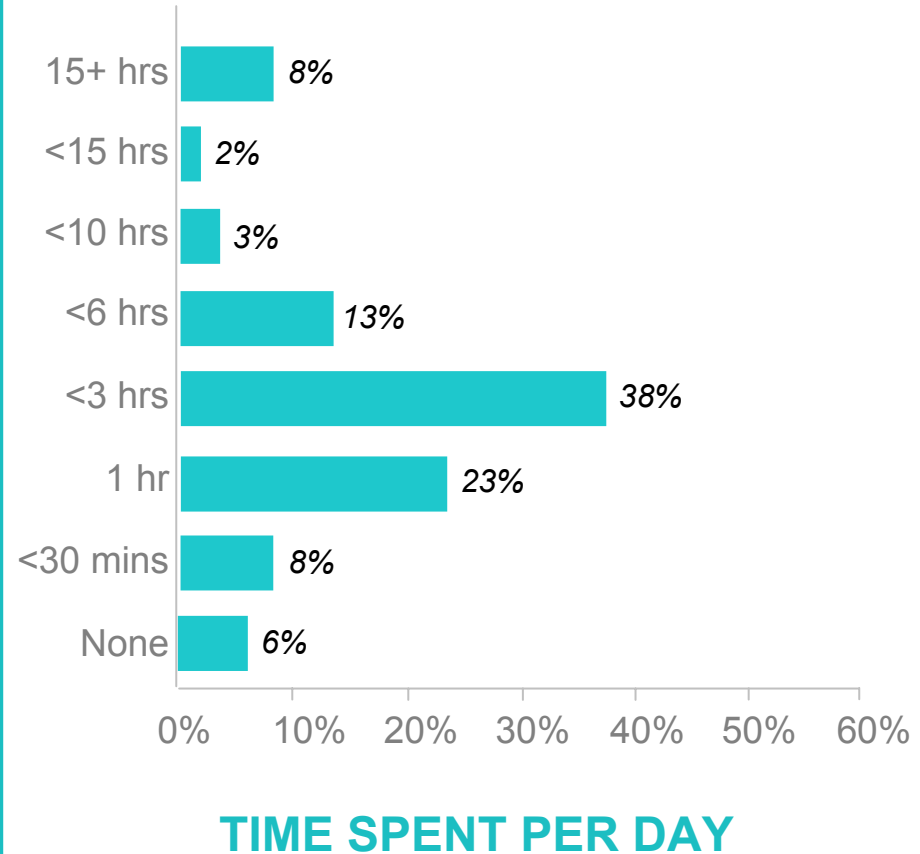
Media consumption

Time spent watching television

71% of MENA Internet users watch television daily



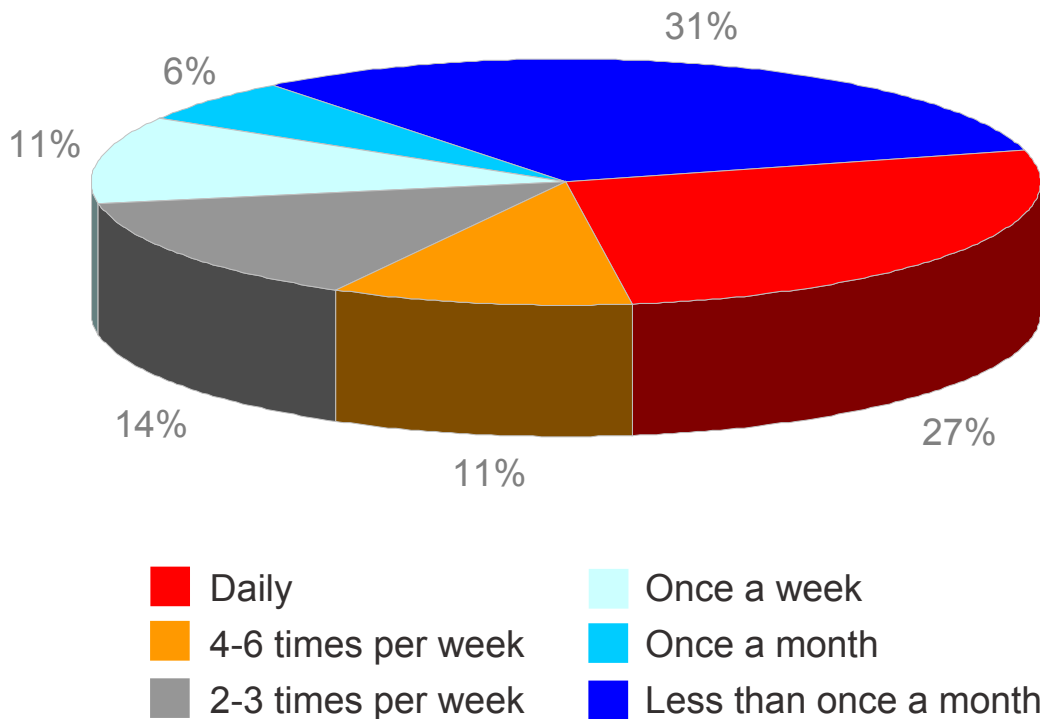
63% watch more than one hour of television per day



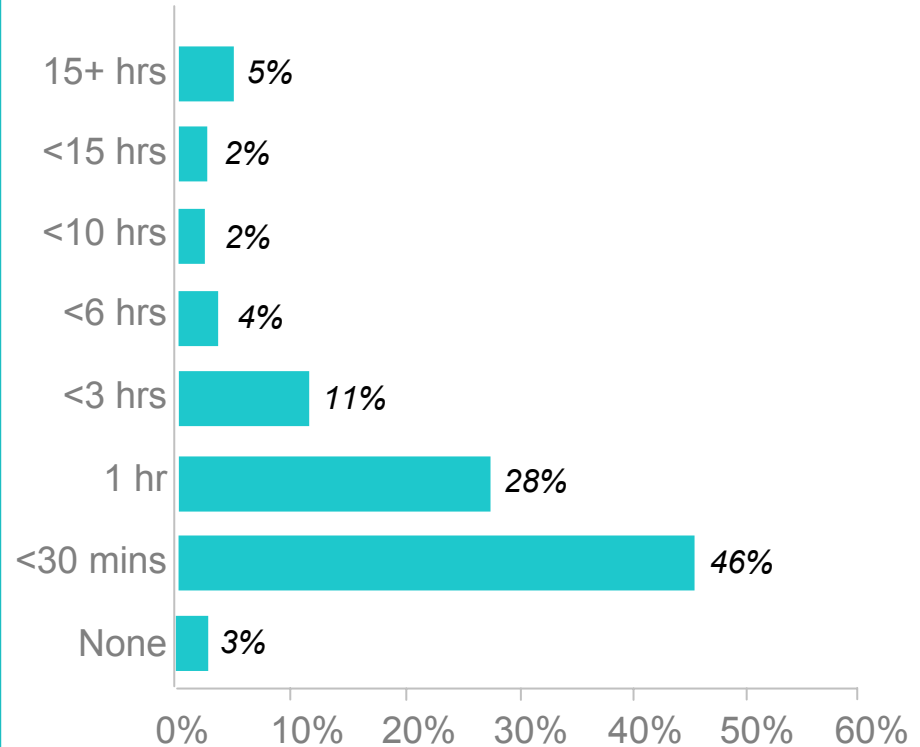
TIME SPENT PER DAY

Time spent listening to the radio

27% of MENA Internet users listen to the radio daily



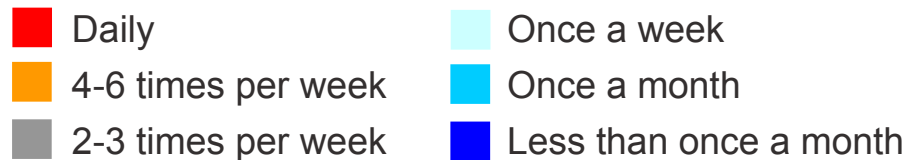
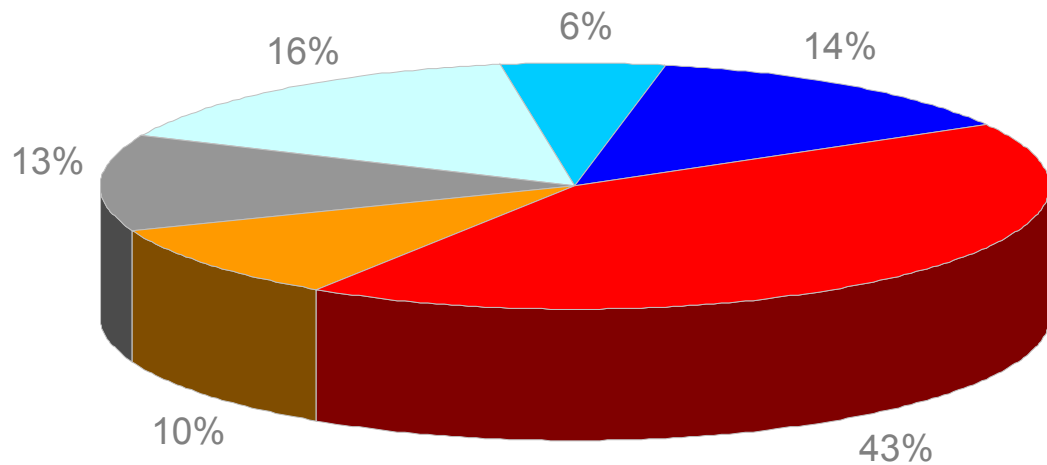
52% listen to the radio for at least an hour per day



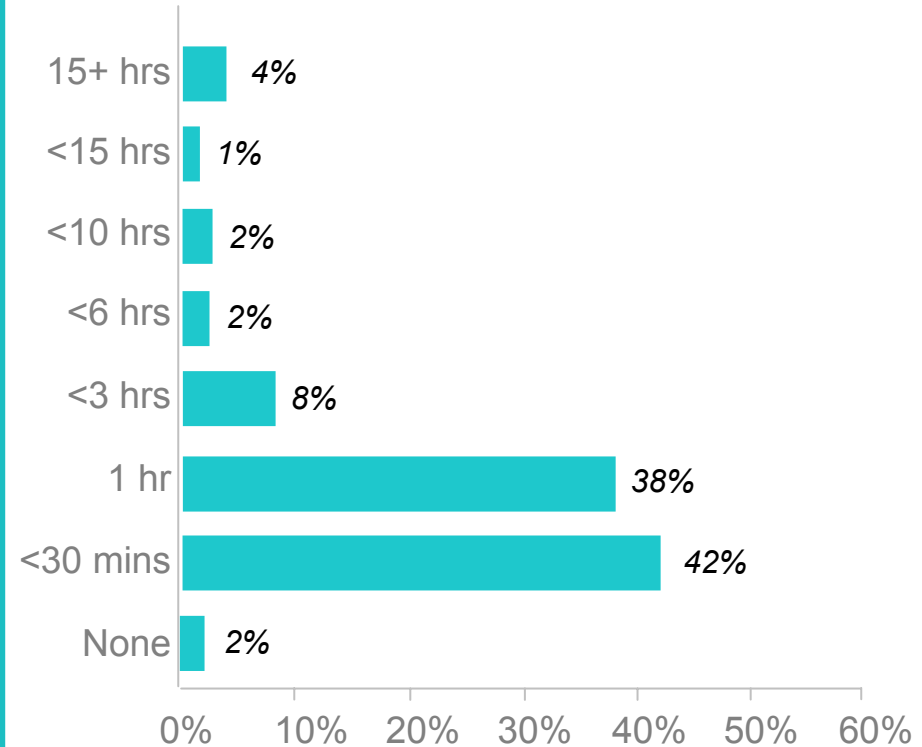
TIME SPENT PER DAY

Time spent reading the newspaper

43% of MENA Internet users read the newspaper daily



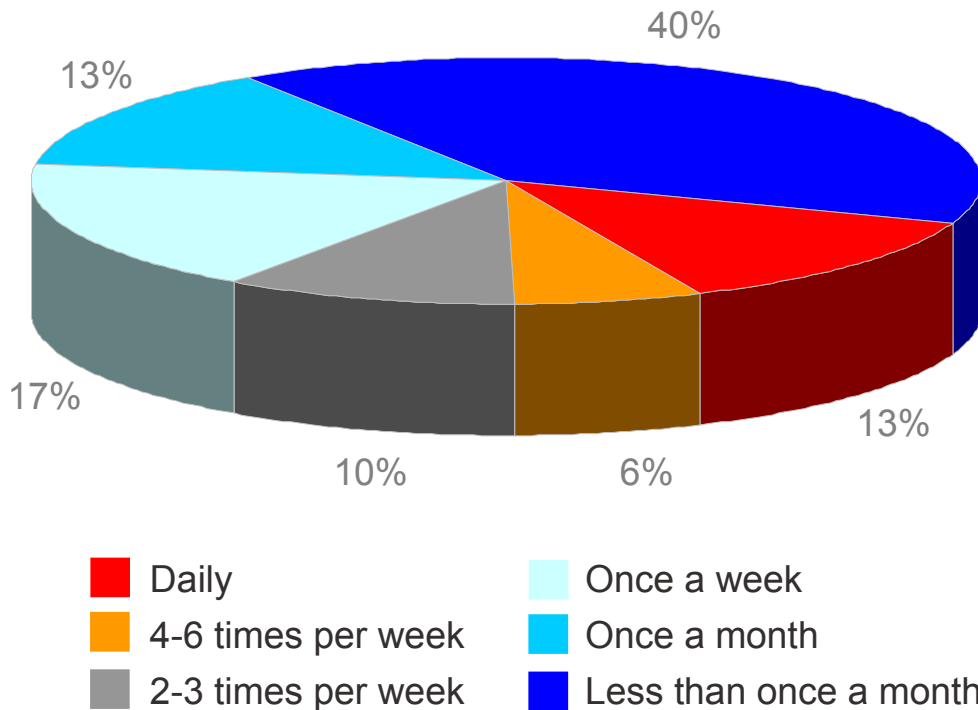
80% read the newspaper for an hour or less per day



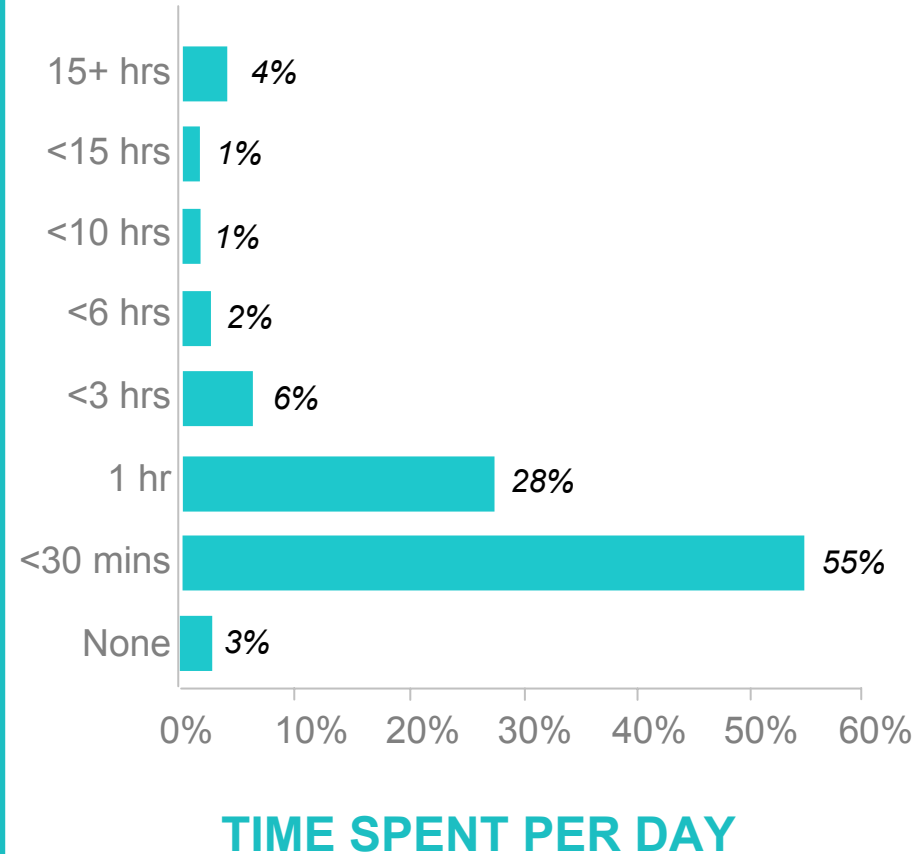
TIME SPENT PER DAY

Time spent reading magazines

29% of MENA Internet users read magazines more than once a week

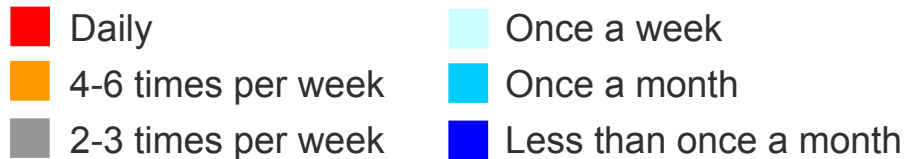
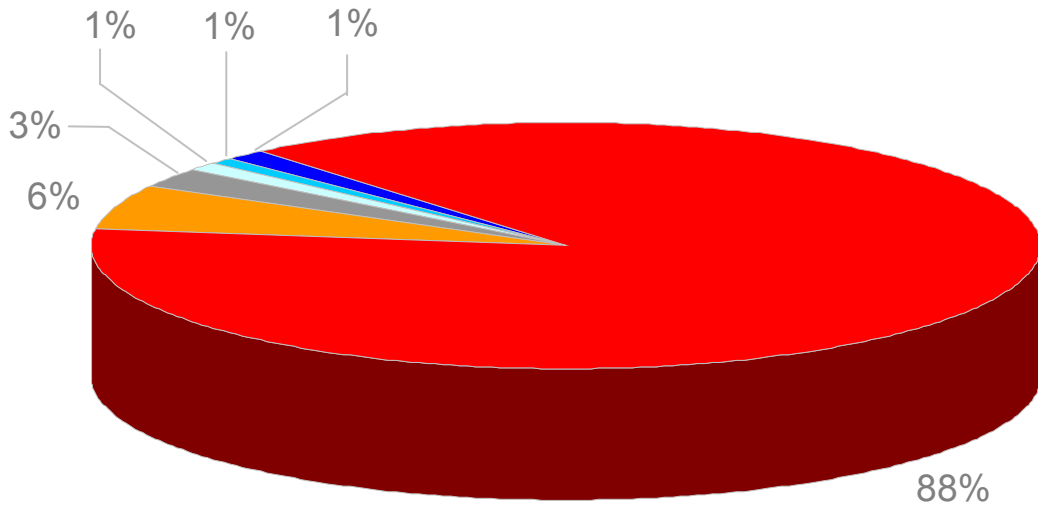


55% read magazines for less than 30 minutes per day

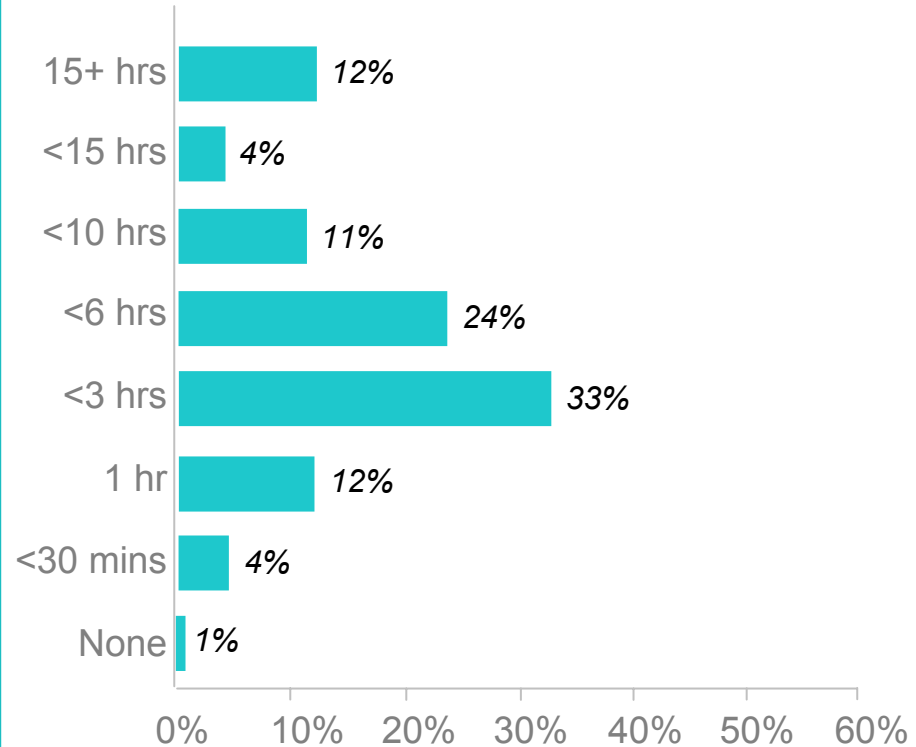


Time spent on the Internet

88% of MENA Internet users browse the Internet daily



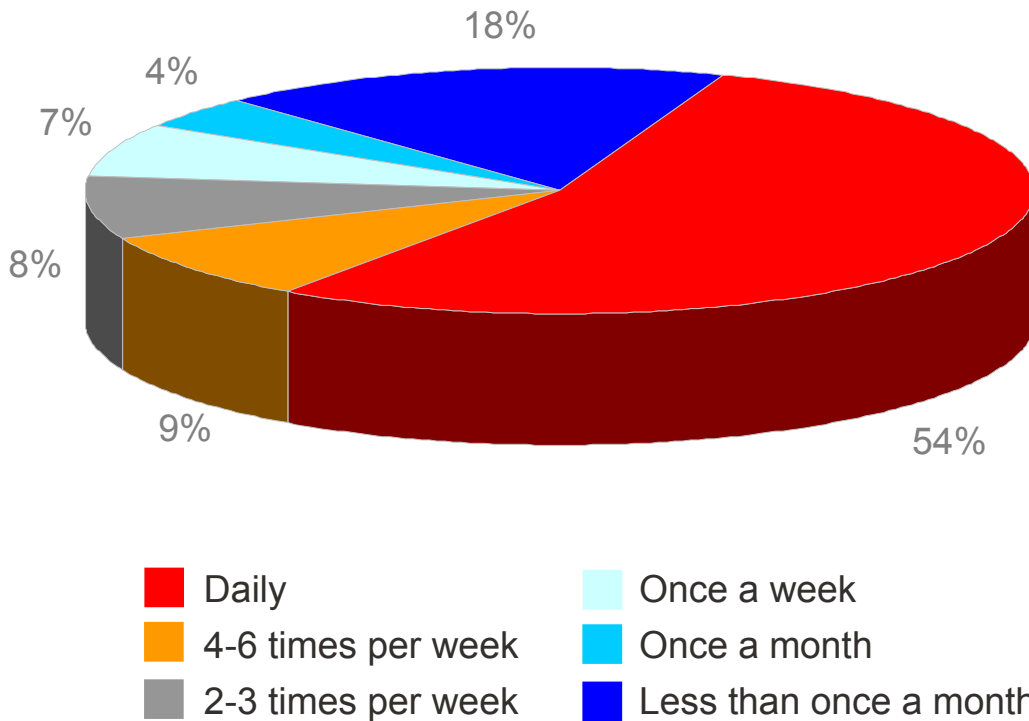
51% spend more than three hours browsing the Internet per day



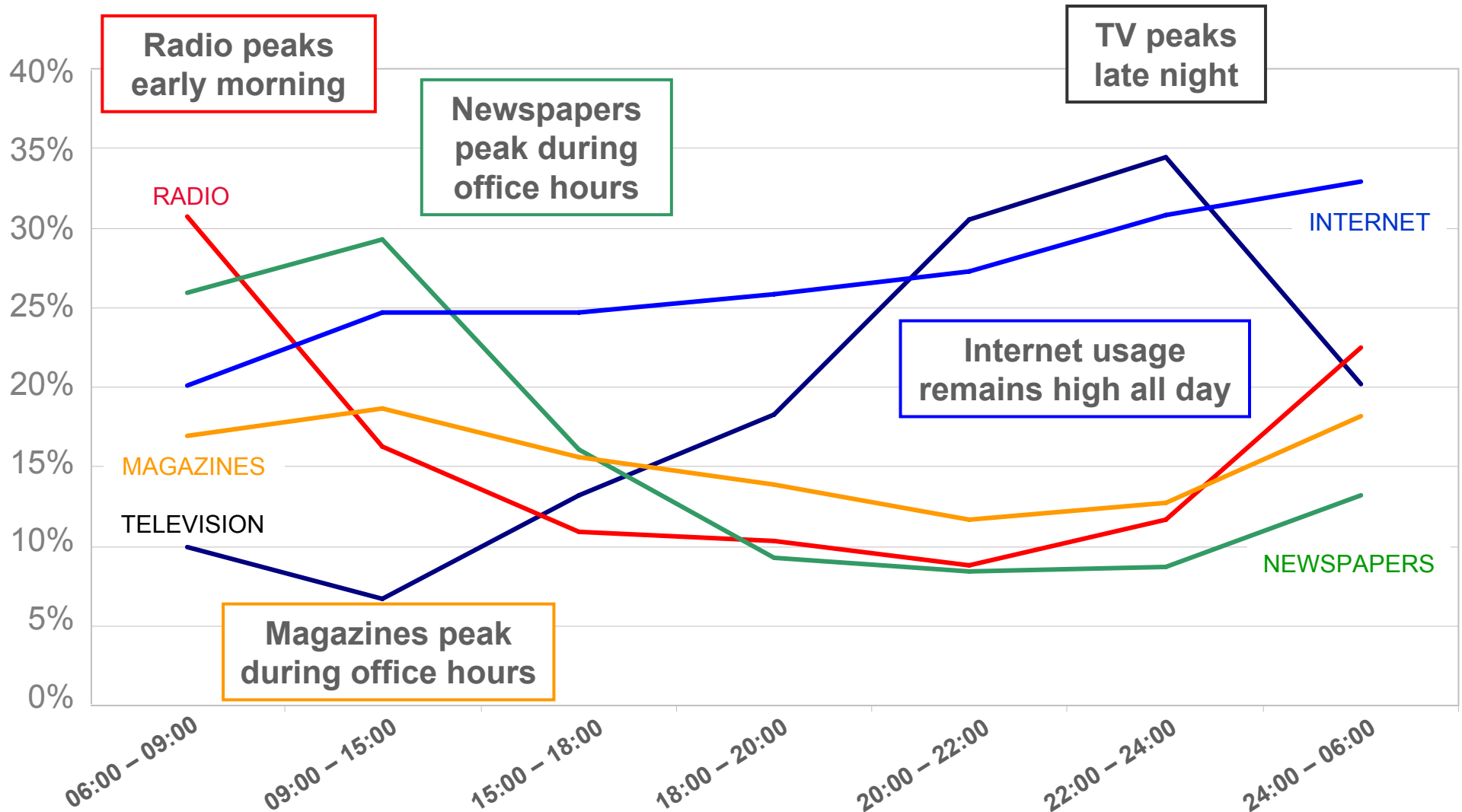
TIME SPENT PER DAY

Time spent using mobile applications

54% of MENA Internet users use mobile apps daily



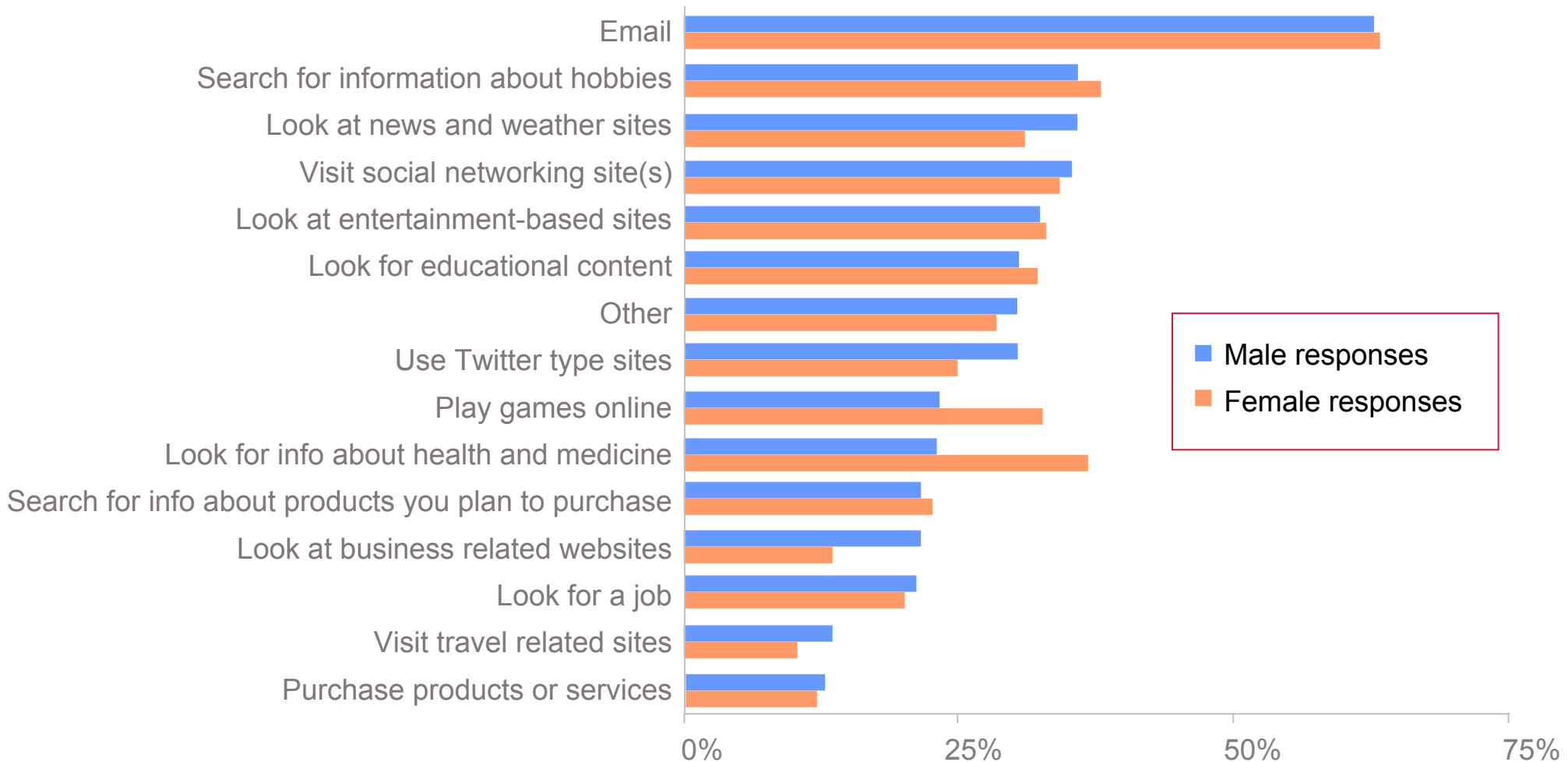
Audience share of media & Internet by time of day



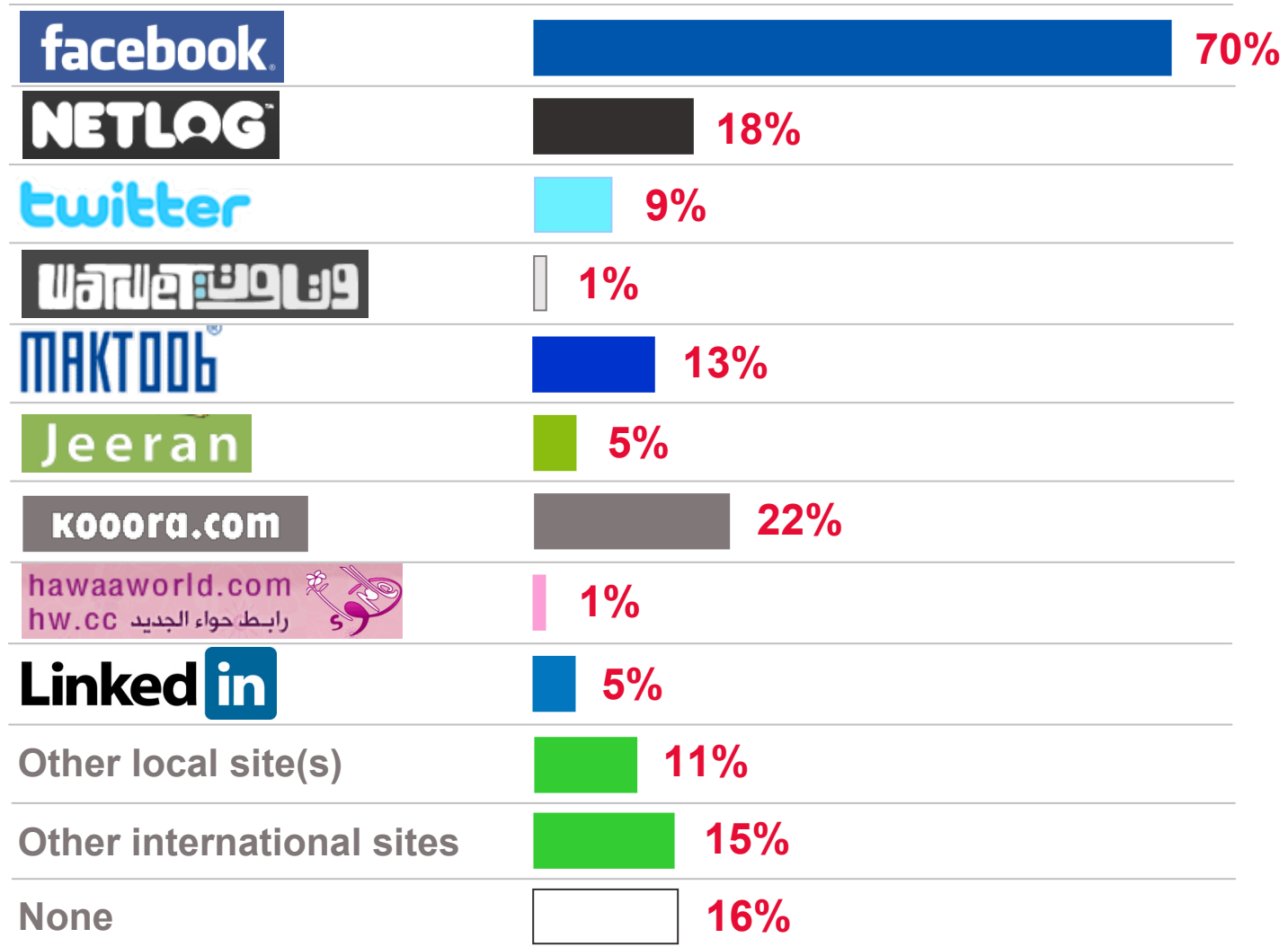
Online activity

Types of online activity most pursued

What type of activities do you do most often do online?

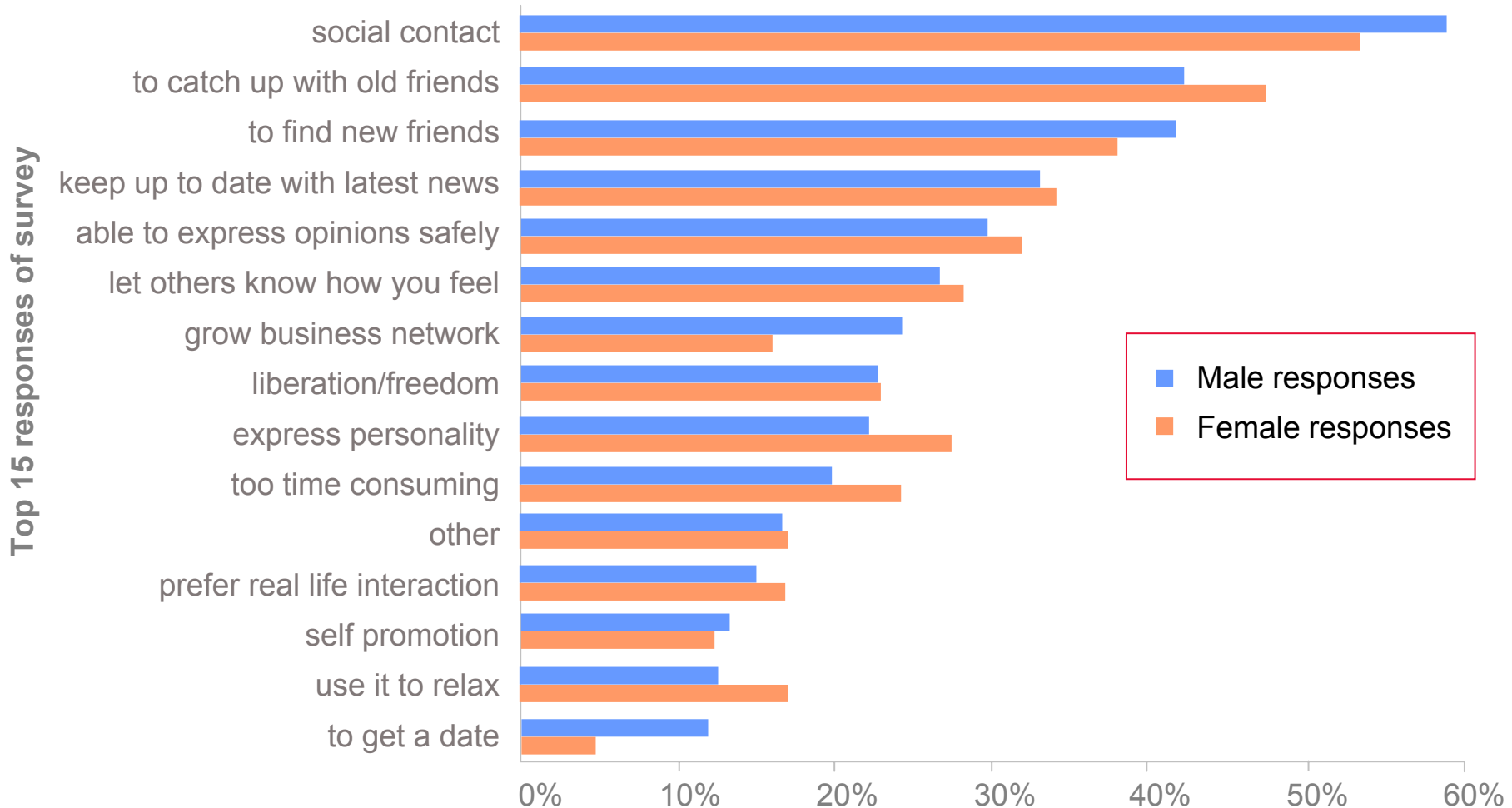


Respondents usage of social media platforms



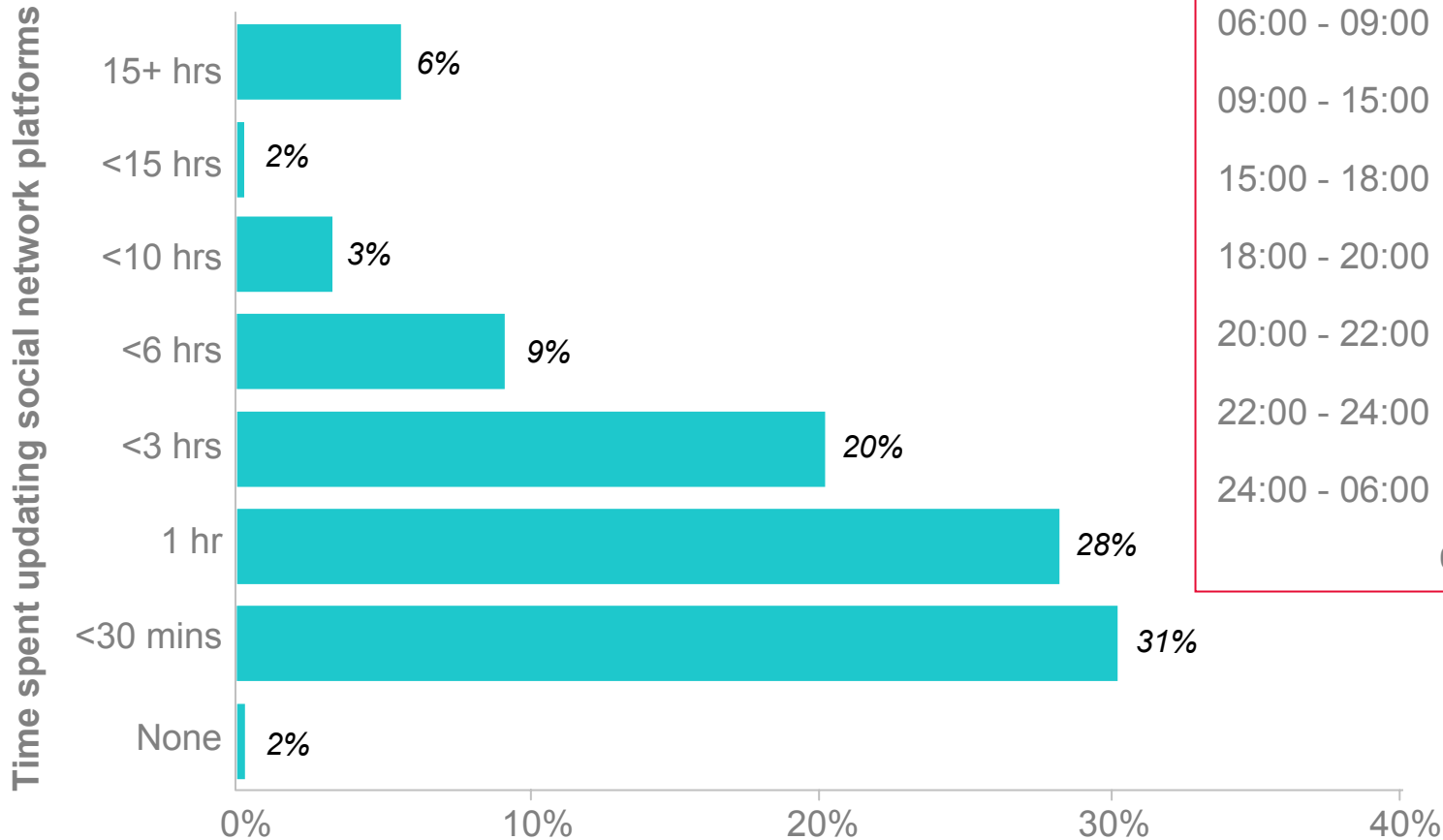
MENA users' experiences with social media

Responses to "Please select all the words or statements below you think best describes your experience with social media."

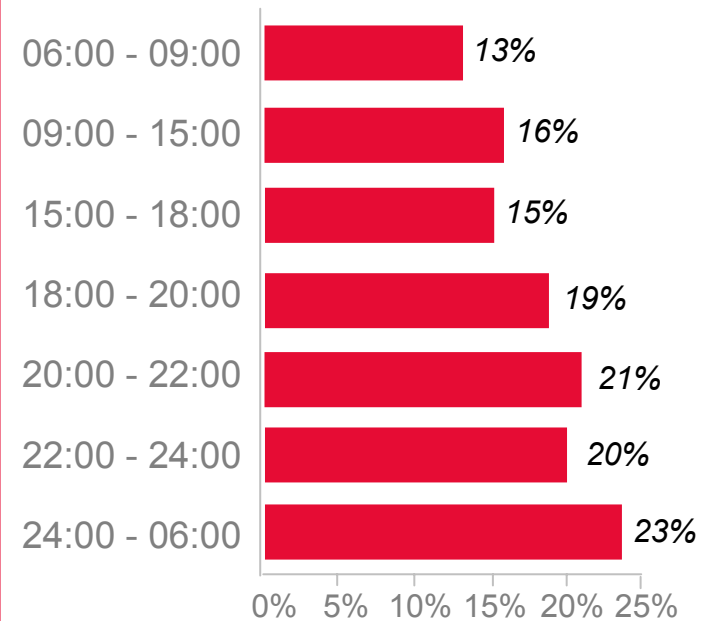


Time spent on social network platforms

79% of MENA Internet users spend up to three hours updating their social networks



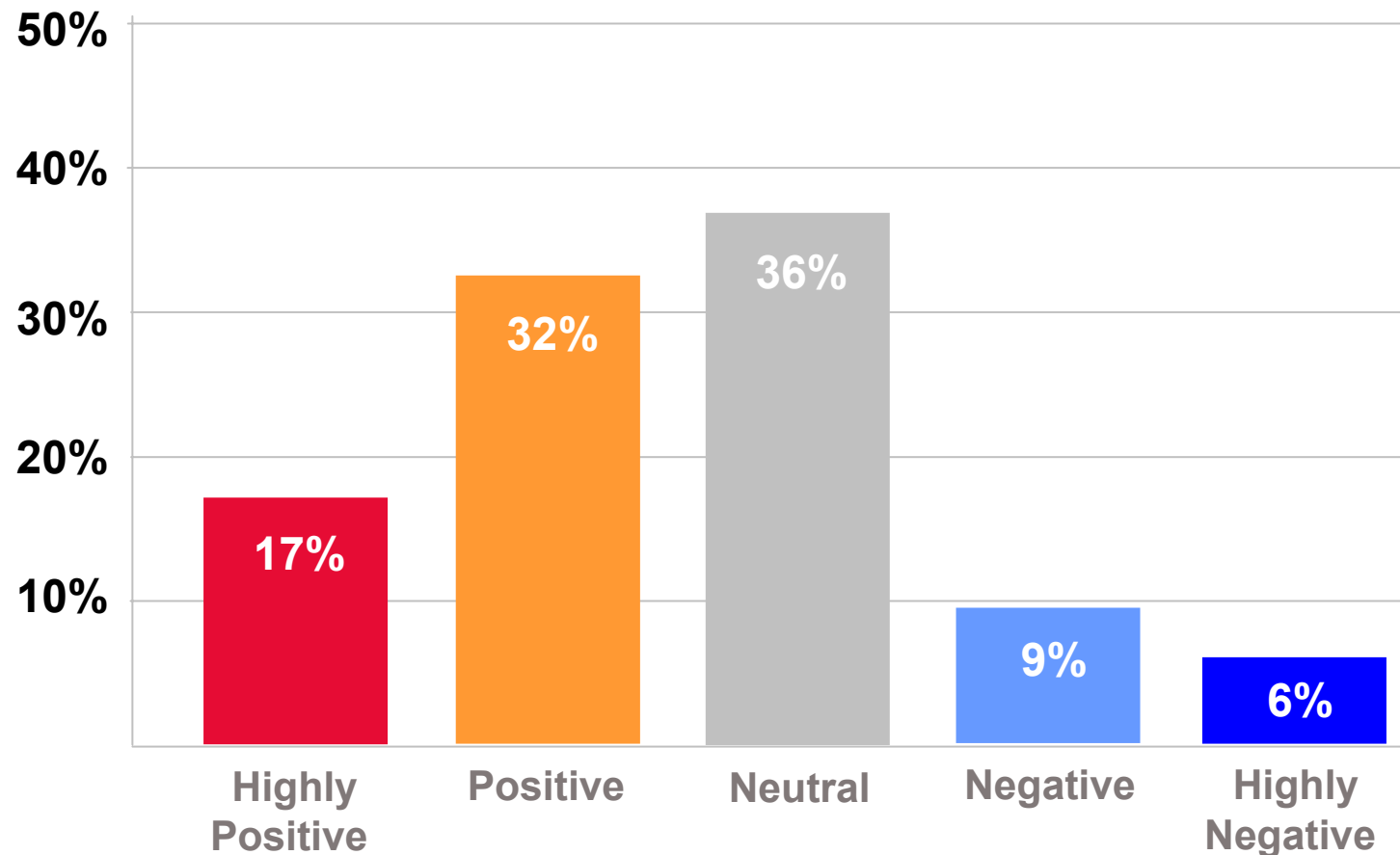
What time do users update their social networks?



Attitudes towards brands online

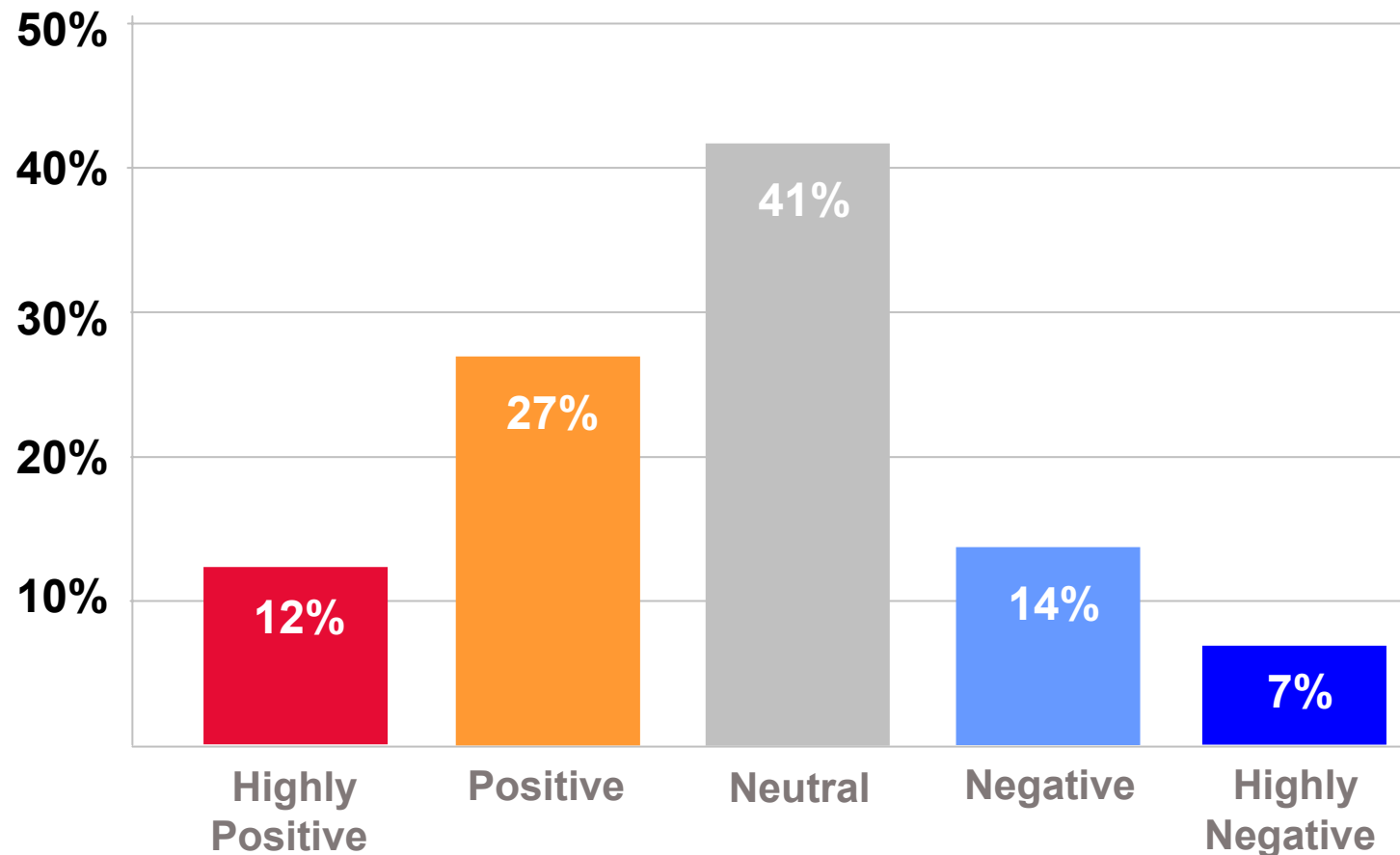
Disposition towards Internet marketers

“PLEASE RATE HOW YOU FEEL TOWARDS COMPANIES AND BRANDS THAT ACTIVELY USE THE INTERNET TO COMMUNICATE THEIR MESSAGE.”



Disposition towards social media marketers

“PLEASE RATE HOW YOU FEEL TOWARDS COMPANIES AND BRANDS THAT ACTIVELY USE SOCIAL MEDIA TO COMMUNICATE THEIR MESSAGE.”



Credits & copyright

About Effective Measure

Effective Measure provides cutting edge digital audience measurement, website rankings, Internet demographics and market intelligence for website publishers, agencies and digital marketers.



Effective Measure's patent-pending digital helix methodology overcomes problems with cookie deletion and unique visitor audience calculation. The solution increases visitation, client visibility and advertising revenue by providing independent third-party analytics to publishers and advertisers around the world.

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About Spot On Public Relations

Spot On Public Relations helps build brands online and offline. With 15 years track record in the Middle East, Spot On helps clients create clear propositions, integrate online/offline strategies and engage effectively with the audiences 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).

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