

Media consumption & habits of MENA Internet users

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

September 2010



Key findings

- **32% of MENA Internet users buy products or services online.**
 - 32% of all Middle East & North Africa Internet users surveyed buy products or services online, compared with 62% in the UK (UK ONS August 2010).
- **GCC Internet users lead online shopping in MENA region.**
 - 43% of Internet users surveyed in the GCC bought products or services online, 11% higher than the MENA average, with 11% shopping online more than 3 times per month.
- **Male and female online shoppers have different purchasing profiles.**
 - While all online shoppers surveyed share similar online buying habits, there are differences in habits such as an increased preference for buying clothing and accessories by female shoppers and for buying electronic equipment by male shoppers.
- **Consumption of media by MENA Internet users during the Muslim holy month of Ramadan varied only slightly compared to July.**
 - The Effective Measure | Spot On PR survey did find differences in media consumption habits during Ramadan (end August), compared to July 2010, but all variances were less than 5.5% plus or minus.

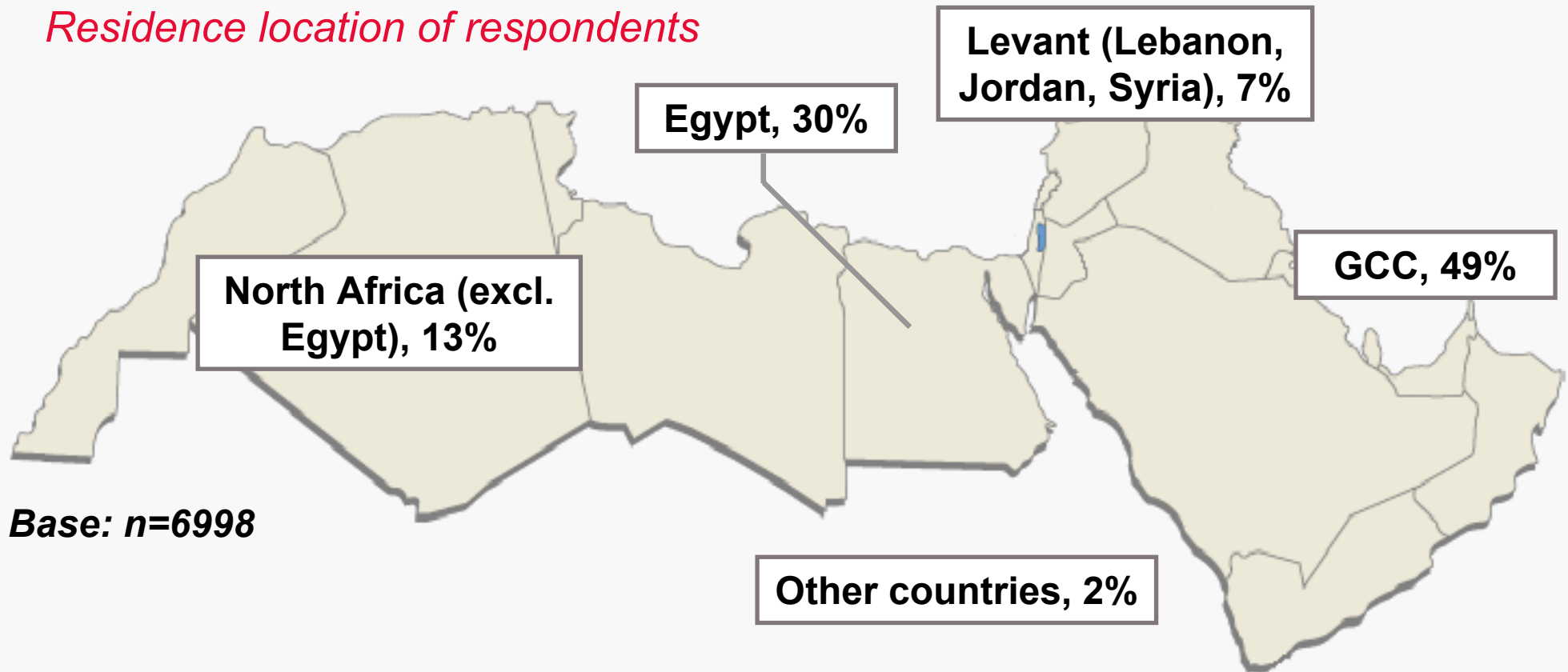
Survey methodology

- The Effective Measure | Spot On PR survey was carried out between July 26th and September 1st, 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=6998.

Demographics of respondents

Demographics of respondents

Residence location of respondents

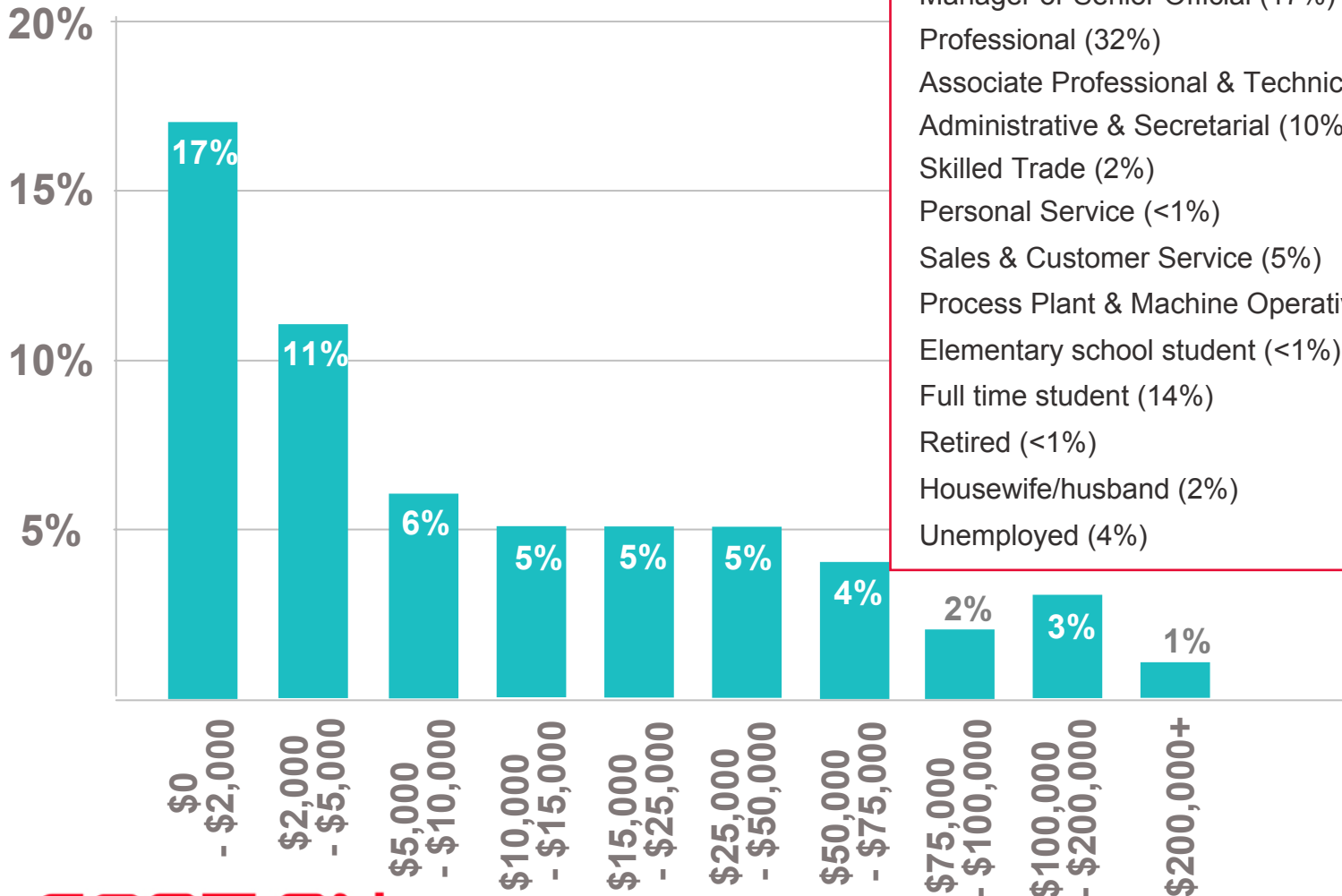


Base: n=6998

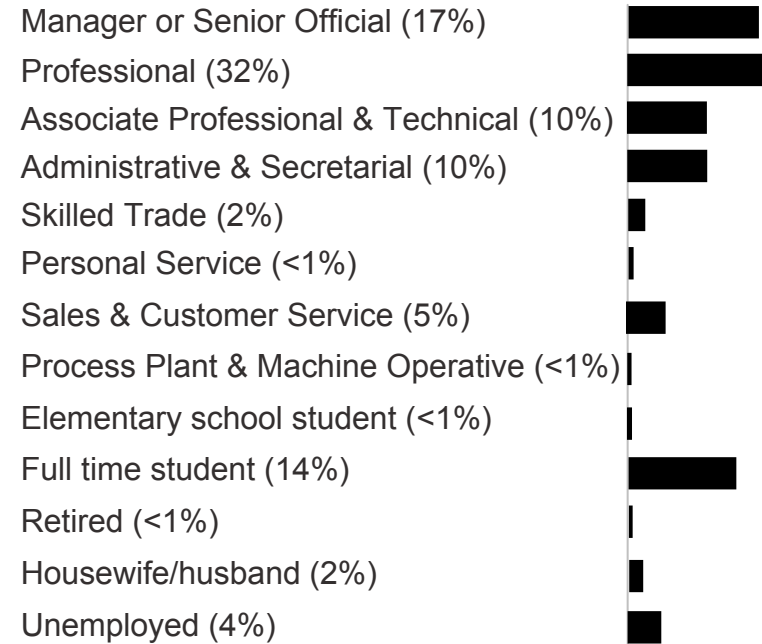
- Note: it should be noted that the sample configuration for the 'MENA' survey is not wholly reflective of country populations and the survey data is unweighted. Countries categories in 'Other countries' include Iran, Iraq, Sudan and Yemen.

Demographics of respondents

GROSS HOUSEHOLD INCOME (US\$ /YEAR)



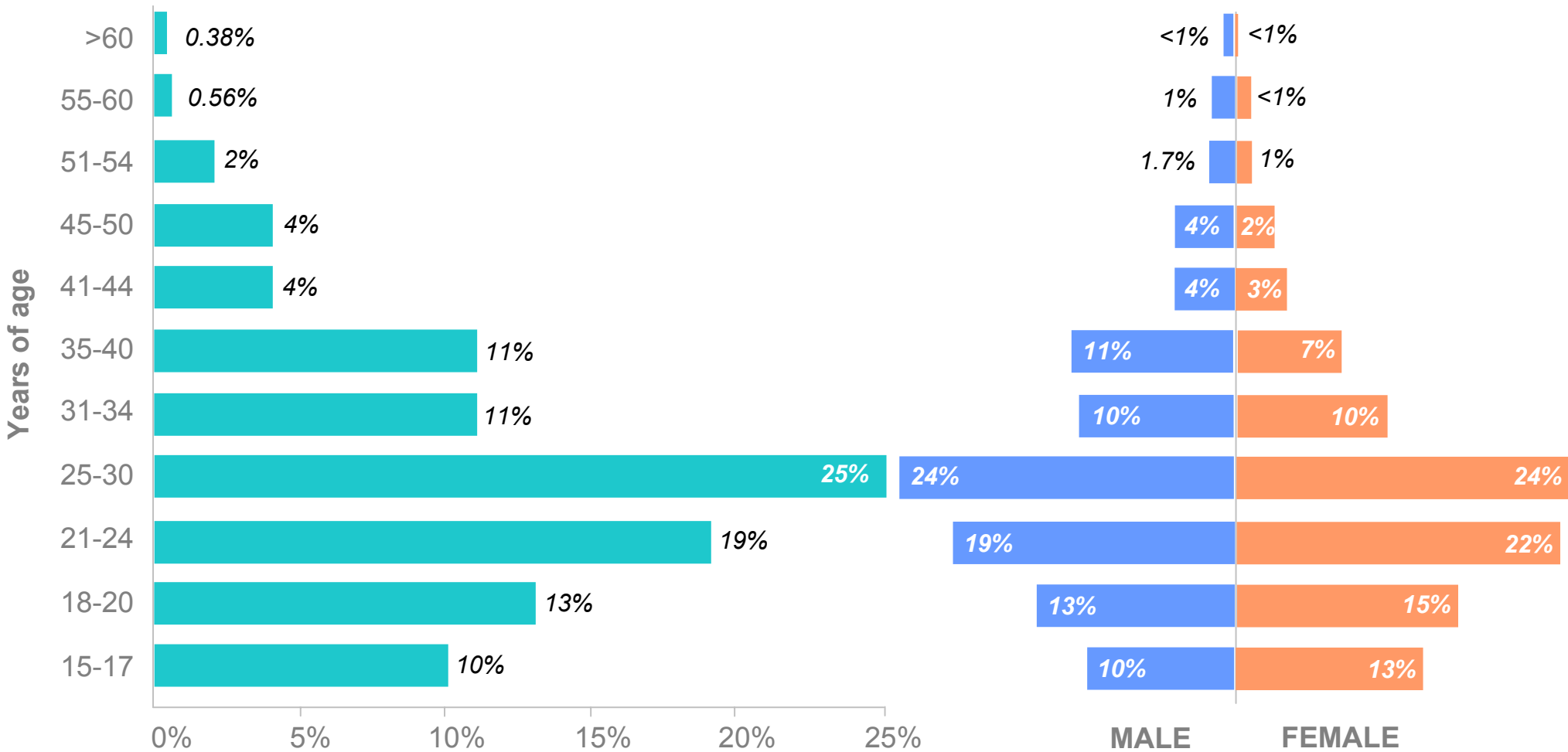
OCCUPATION



Demographics of respondents

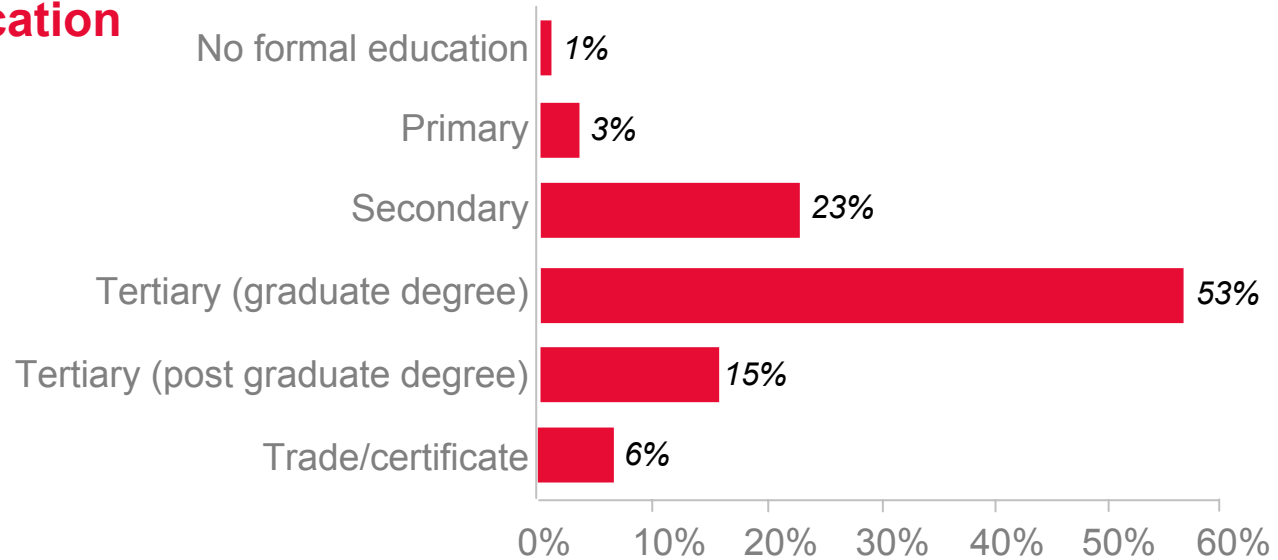
AGE OF RESPONDENTS

GENDER

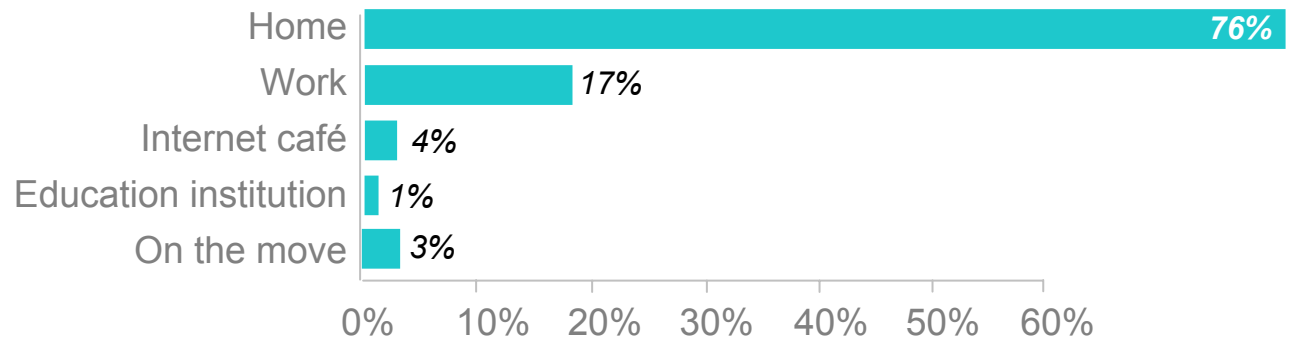


Demographics of respondents

67% of Internet users surveyed have a tertiary education



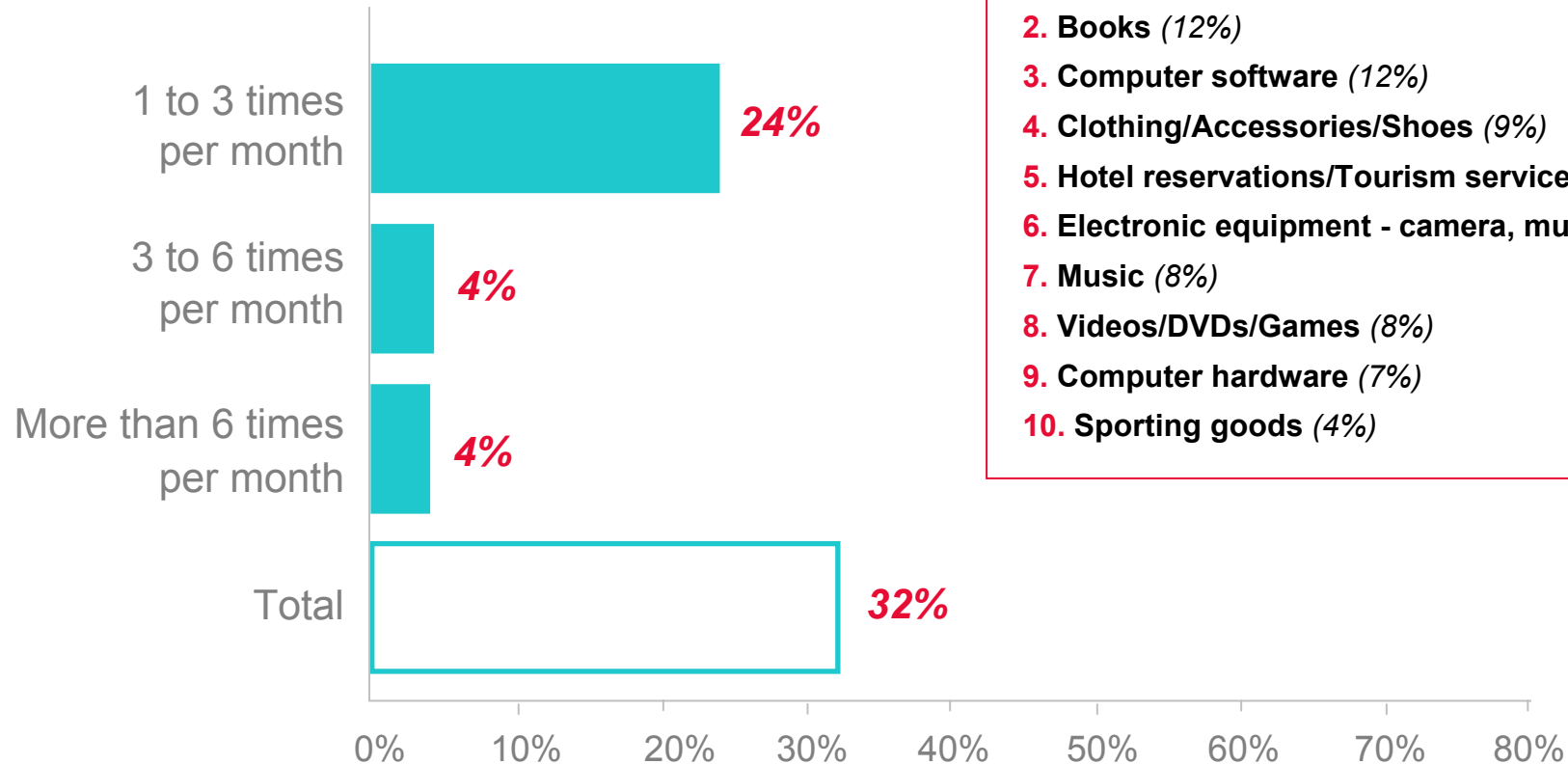
76% of users access the Internet from their homes



One purchasing habits

Online purchasing habits (MENA)

32% of MENA Internet users purchase products online



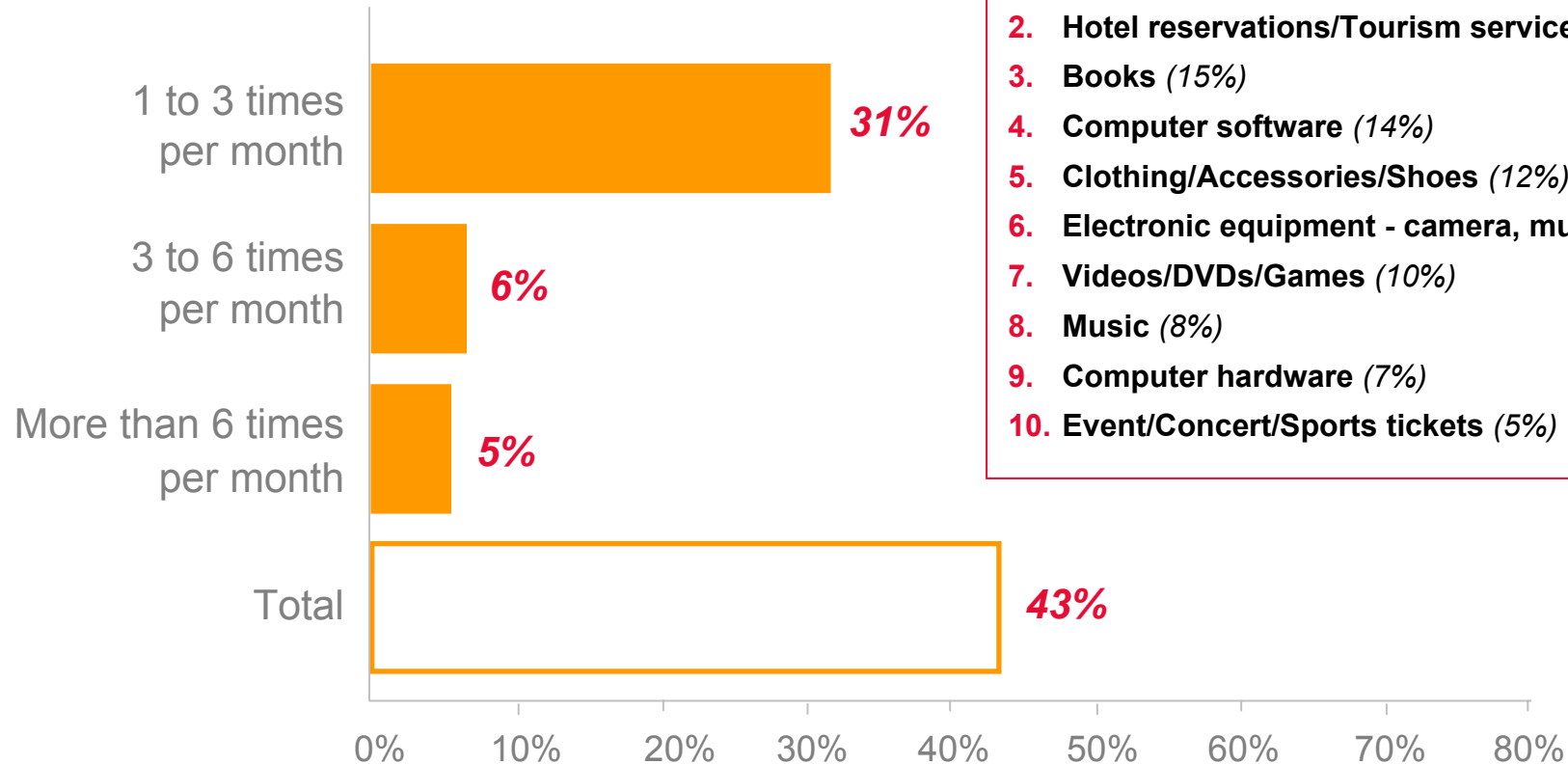
Top ten online purchases (MENA)

1. Airlines tickets (19%)
2. Books (12%)
3. Computer software (12%)
4. Clothing/Accessories/Shoes (9%)
5. Hotel reservations/Tourism services (9%)
6. Electronic equipment - camera, music player, TV (9%)
7. Music (8%)
8. Videos/DVDs/Games (8%)
9. Computer hardware (7%)
10. Sporting goods (4%)

Q. How often do you purchase products online?

Online purchasing habits (GCC)

31% of GCC Internet users buy online at least 1X per month



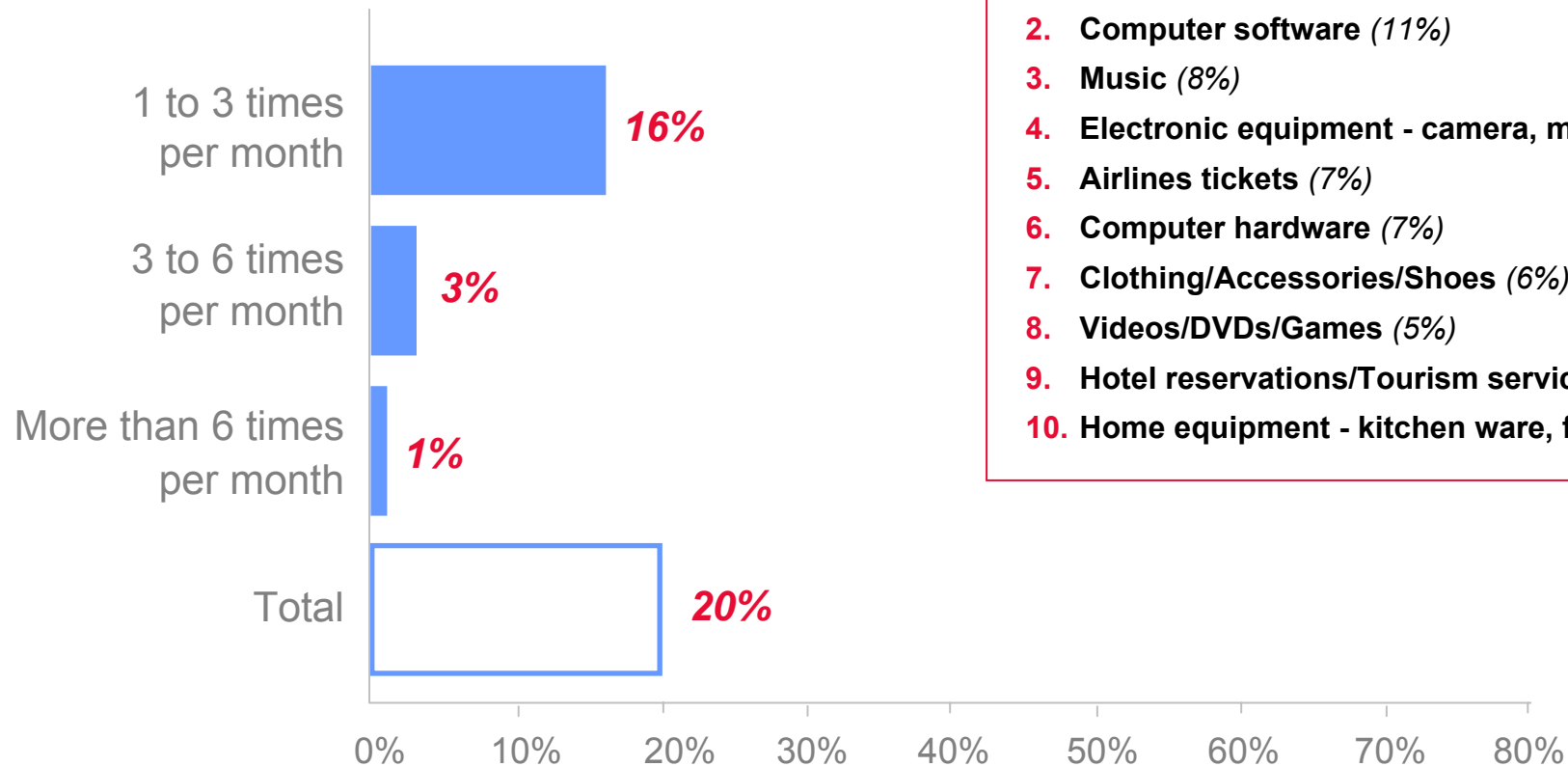
Top ten online purchases (GCC)

1. Airlines tickets (31%)
2. Hotel reservations/Tourism services (15%)
3. Books (15%)
4. Computer software (14%)
5. Clothing/Accessories/Shoes (12%)
6. Electronic equipment - camera, music player, TV (11%)
7. Videos/DVDs/Games (10%)
8. Music (8%)
9. Computer hardware (7%)
10. Event/Concert/Sports tickets (5%)

Q. How often do you purchase products online?

Online purchasing habits (Levant)

**20% of Internet users
in the Levant buy online**



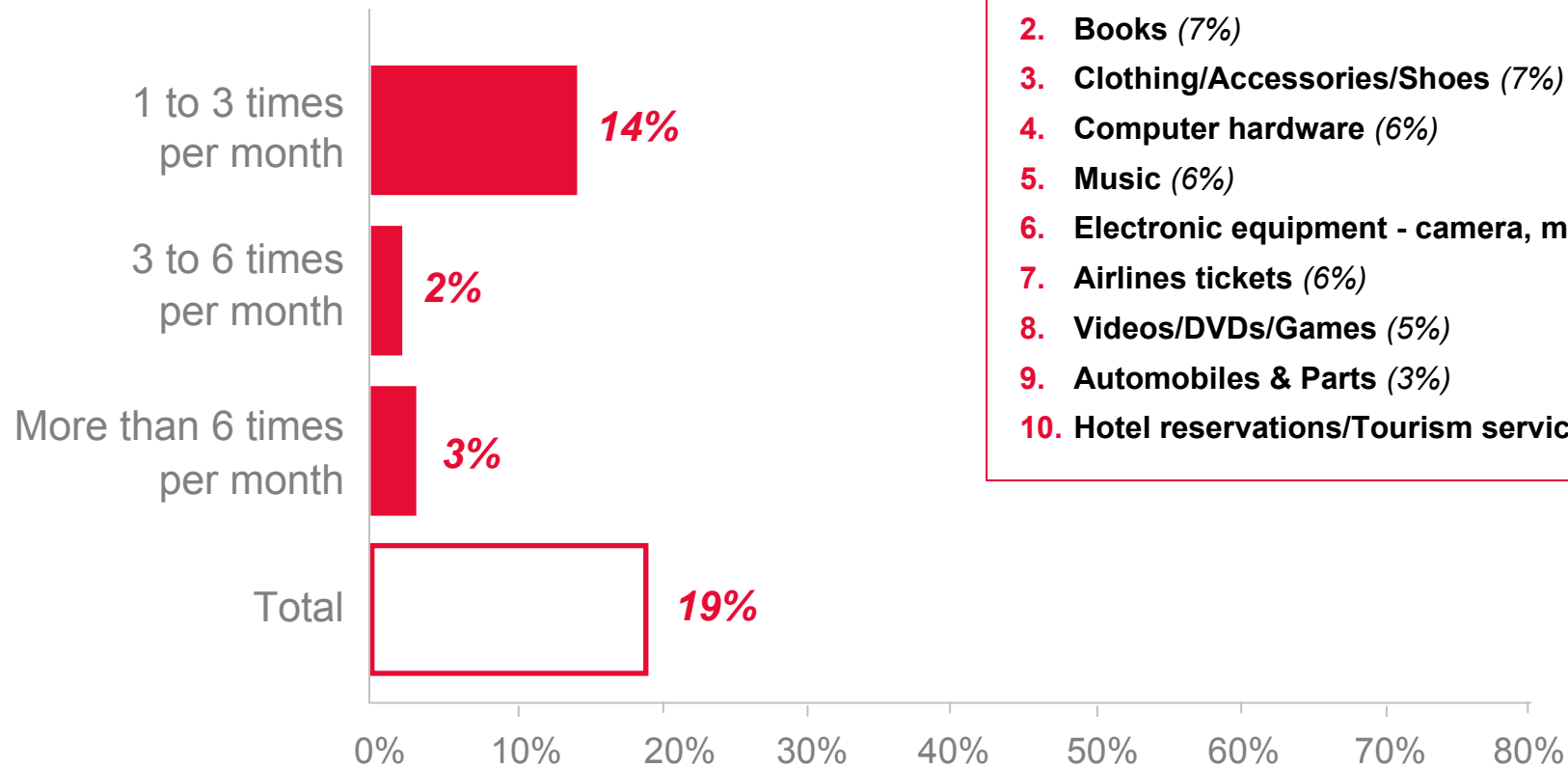
Top ten online purchases (Levant)

1. Books (13%)
2. Computer software (11%)
3. Music (8%)
4. Electronic equipment - camera, music player, TV (7%)
5. Airlines tickets (7%)
6. Computer hardware (7%)
7. Clothing/Accessories/Shoes (6%)
8. Videos/DVDs/Games (5%)
9. Hotel reservations/Tourism services (3%)
10. Home equipment - kitchen ware, furniture, etc. (3%)

Q. How often do you purchase products online?

Online purchasing habits (North Africa)

19% of Internet users in the North Africa buy online



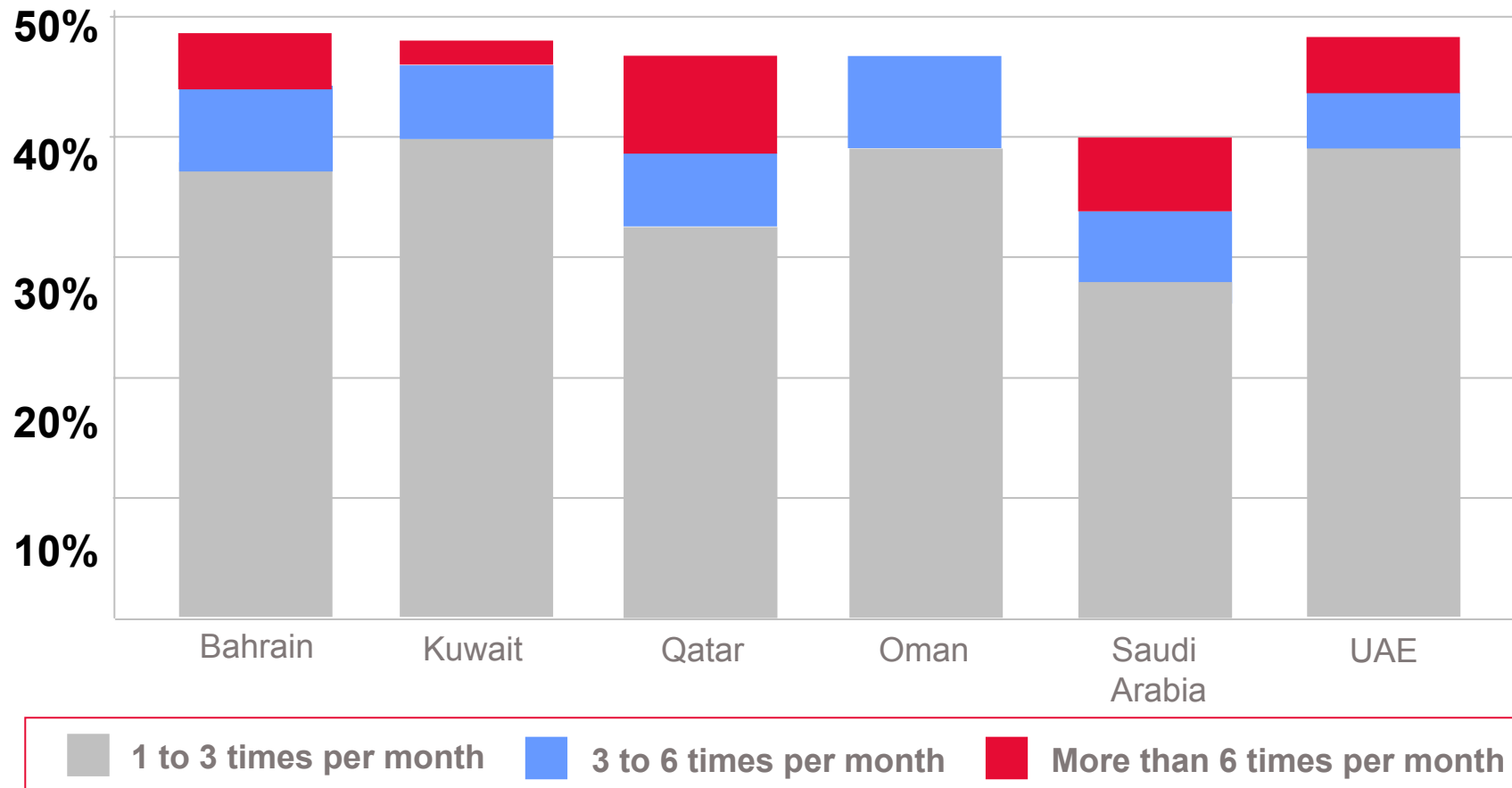
Top ten online purchases (N. Africa)

1. Computer software (9%)
2. Books (7%)
3. Clothing/Accessories/Shoes (7%)
4. Computer hardware (6%)
5. Music (6%)
6. Electronic equipment - camera, music player, TV (6%)
7. Airlines tickets (6%)
8. Videos/DVDs/Games (5%)
9. Automobiles & Parts (3%)
10. Hotel reservations/Tourism services (3%)

Q. How often do you purchase products online?

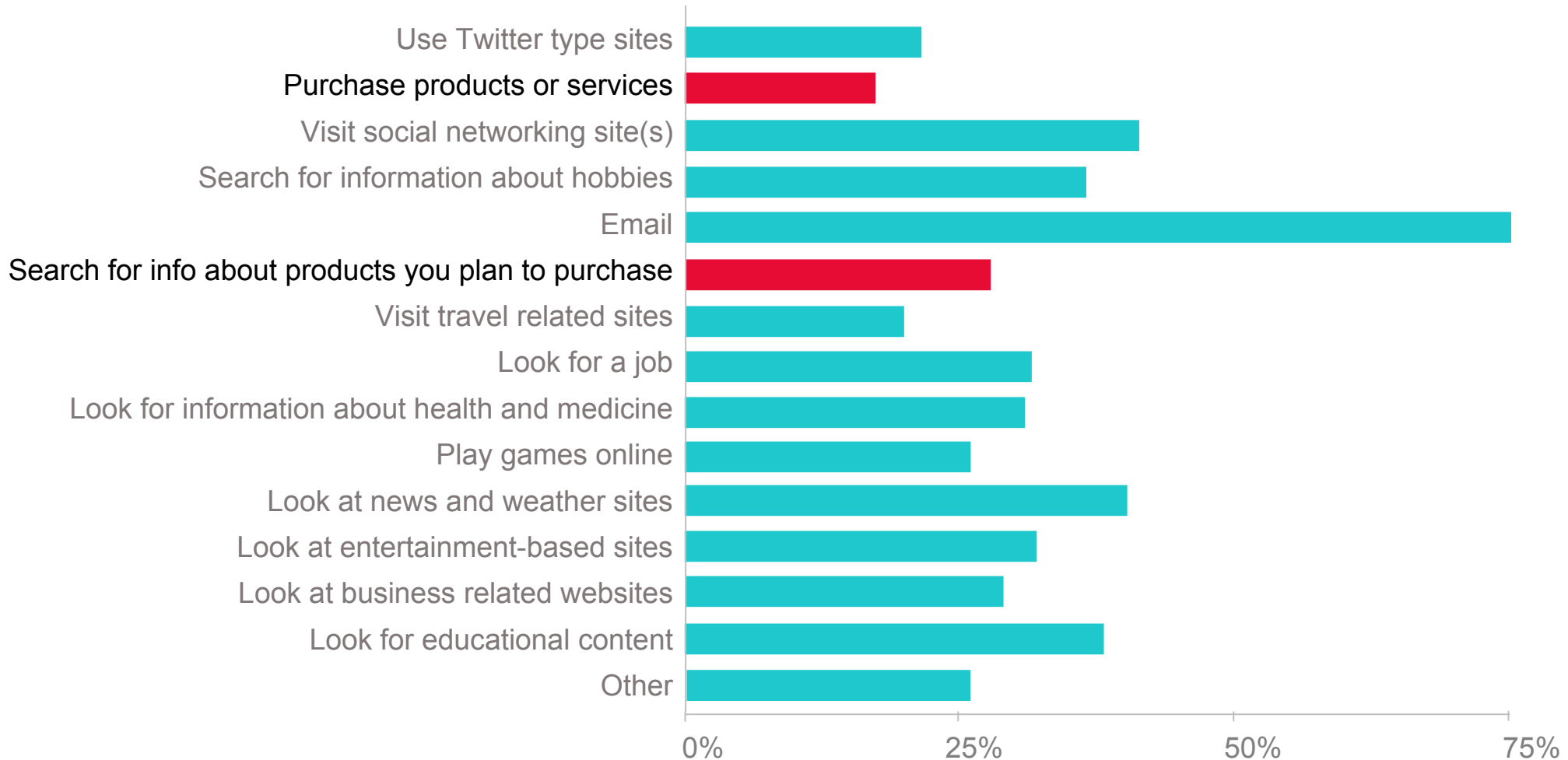
Frequency of online purchasing (GCC)

13% OF QATAR INTERNET USERS & 12% OF SAUDI INTERNET USERS MADE PURCHASES ONLINE MORE THAN THREE TIMES PER MONTH



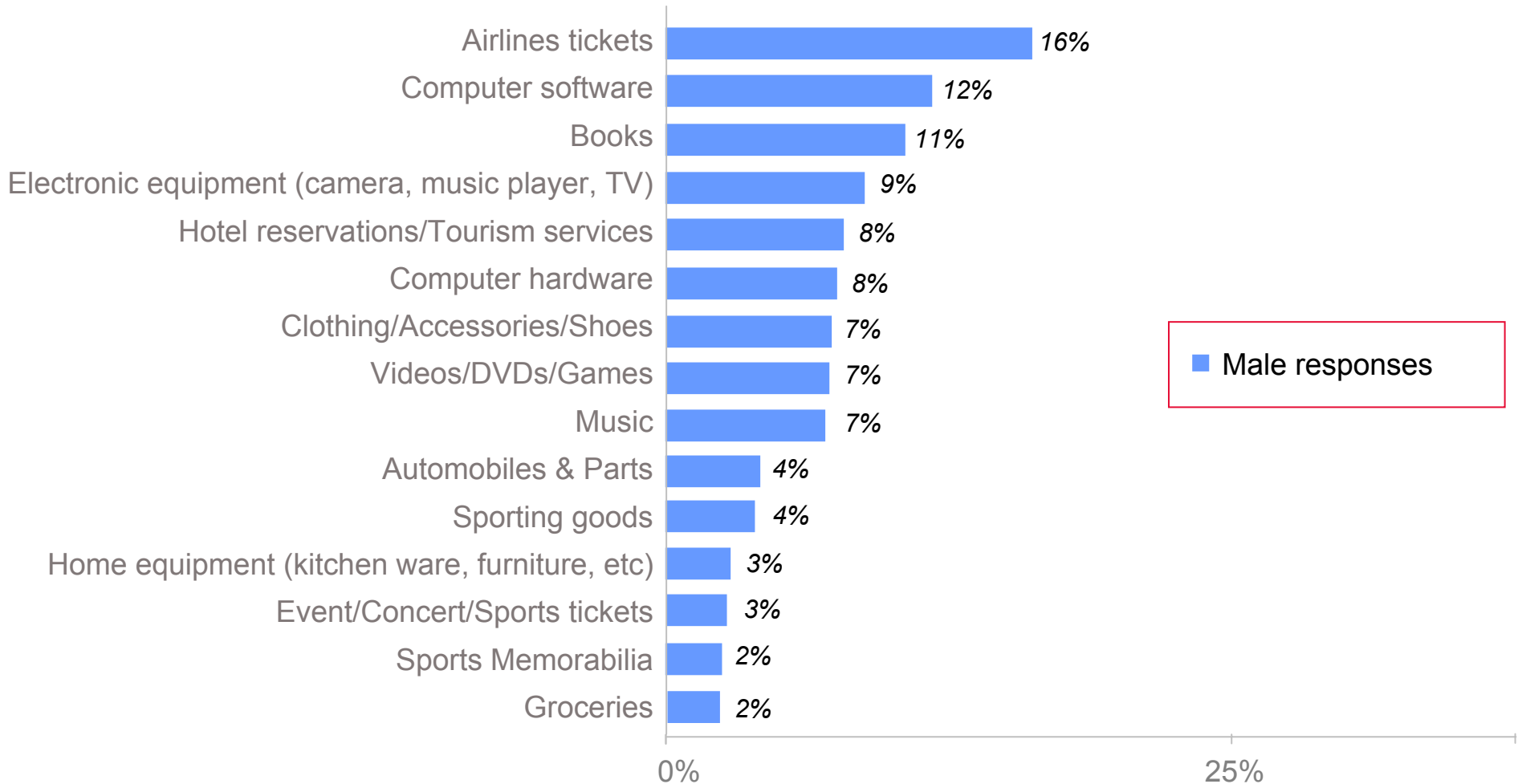
Types of online activity most pursued (MENA)

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



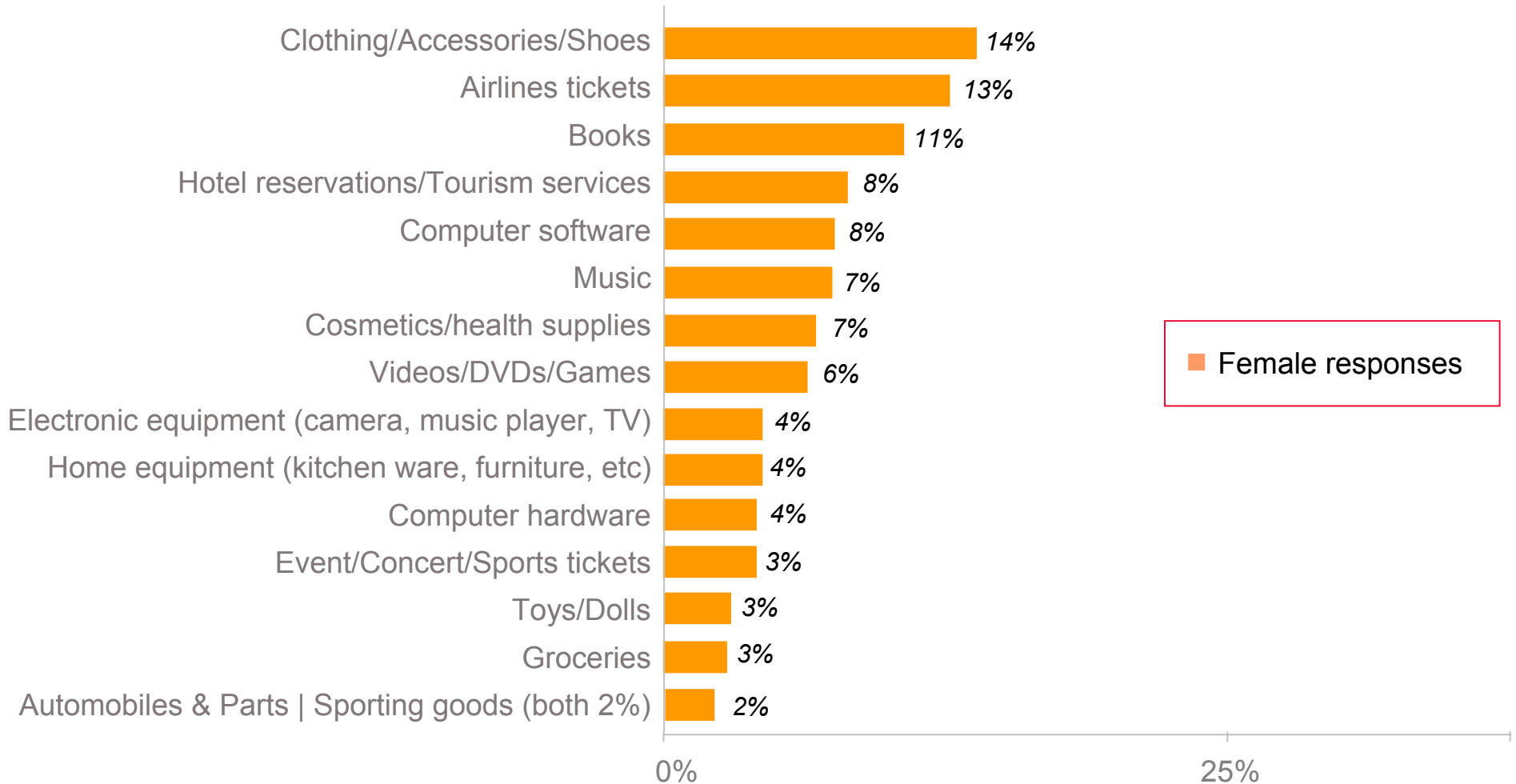
Types of products purchased online (Male)

What kind of products have you purchased online in the last 3 months? (top 15 answers)



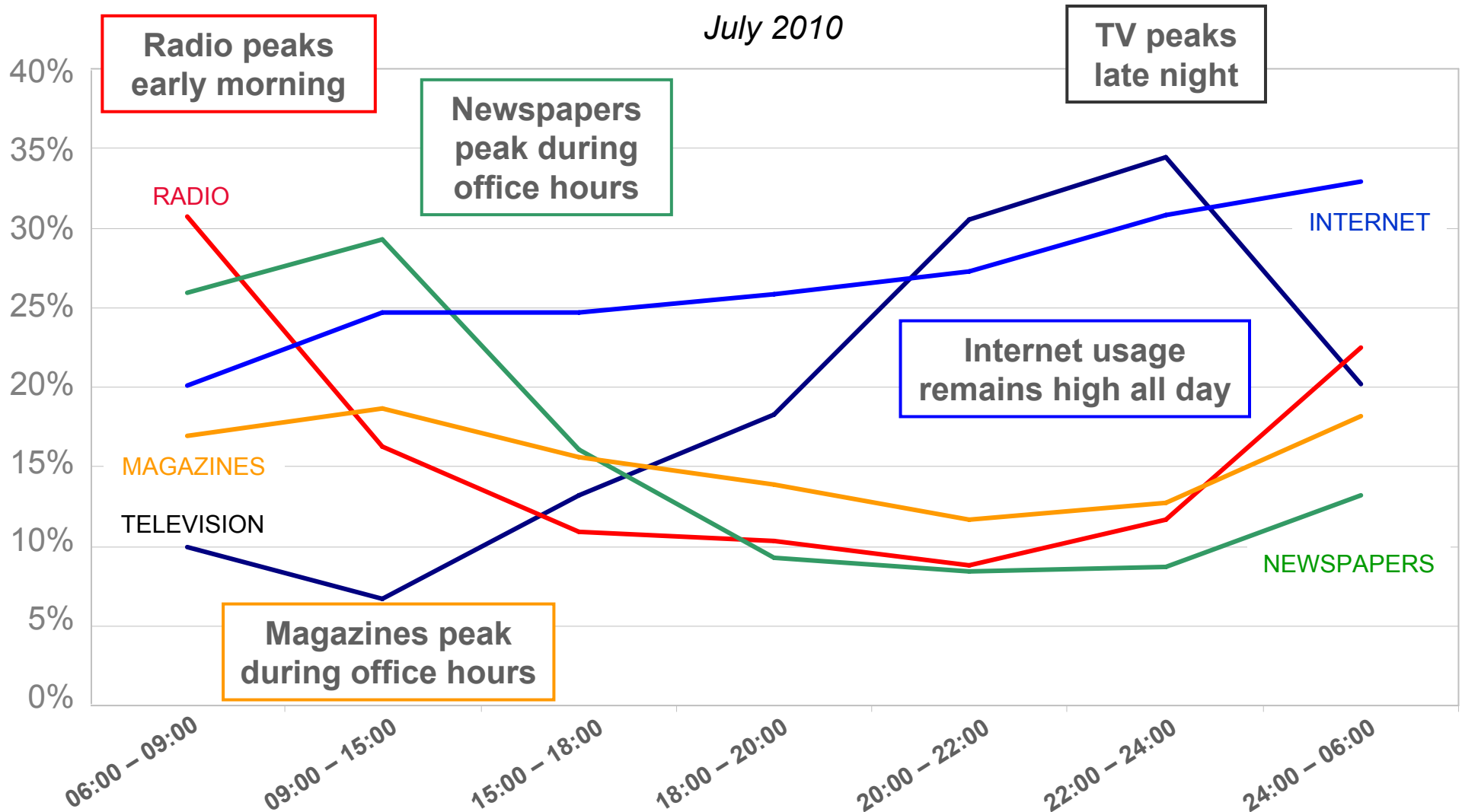
Types of products purchased online (Female)

What kind of products have you purchased online in the last 3 months? (top 15 answers)

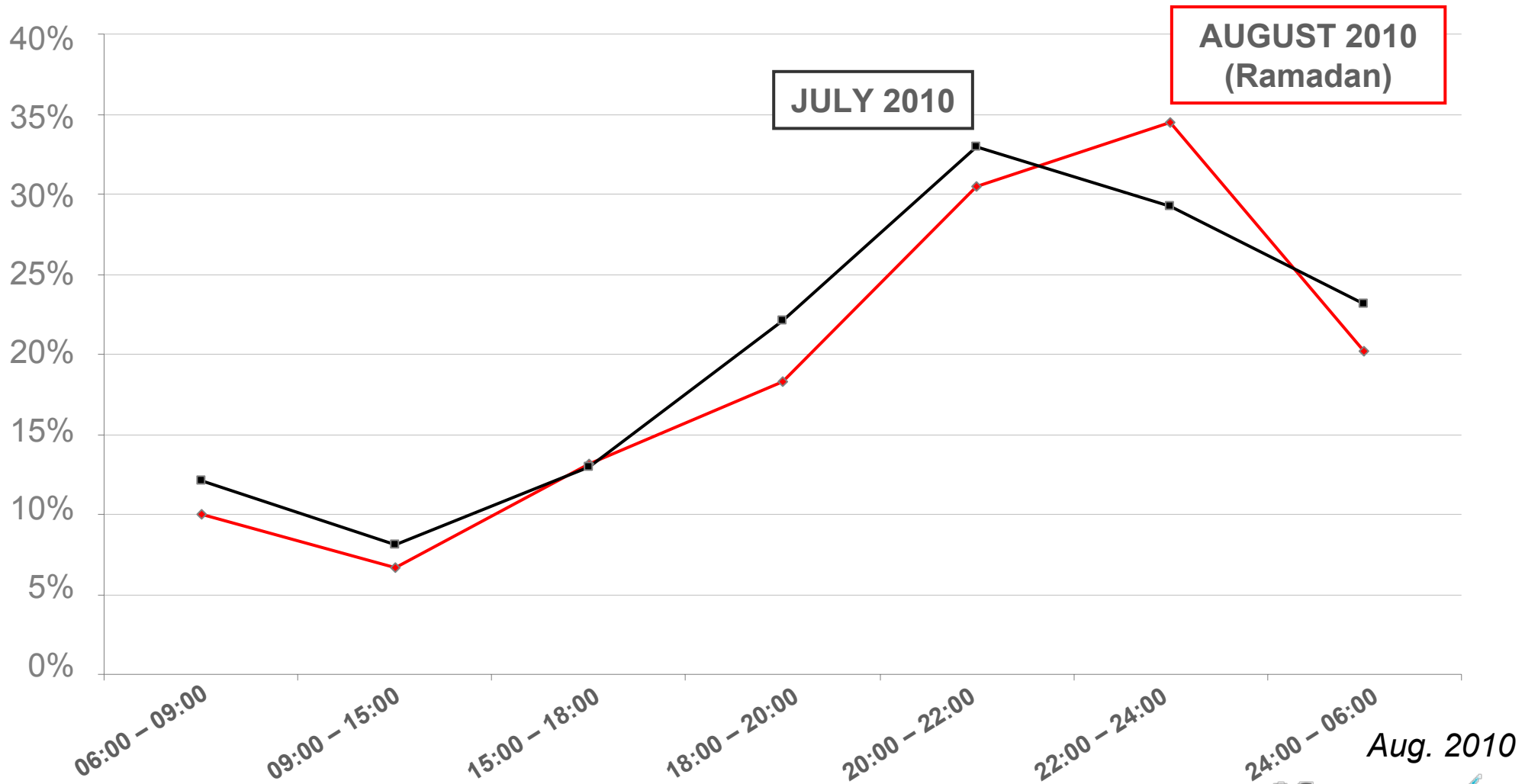


Media consumption

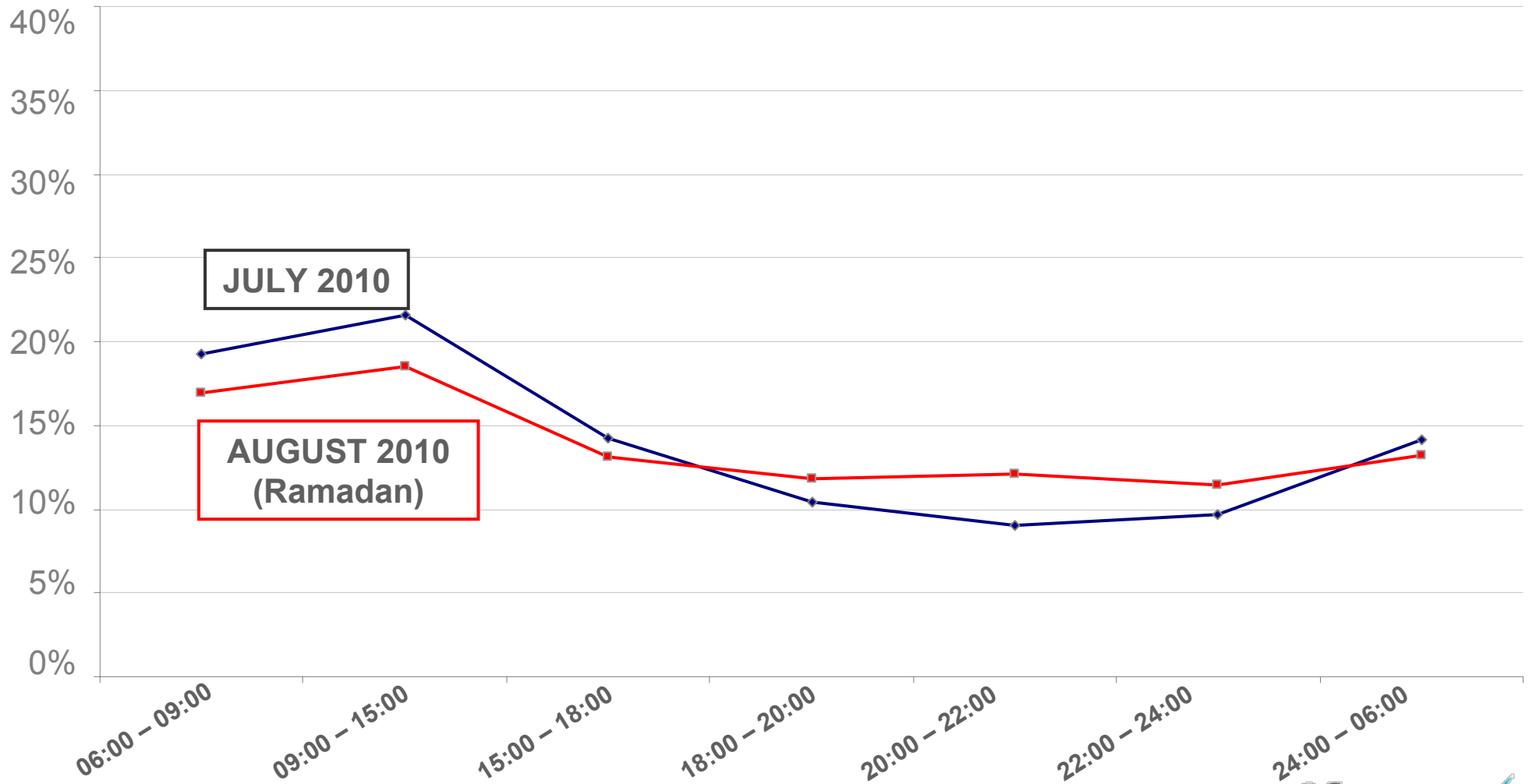
Audience share of media & Internet by time of day



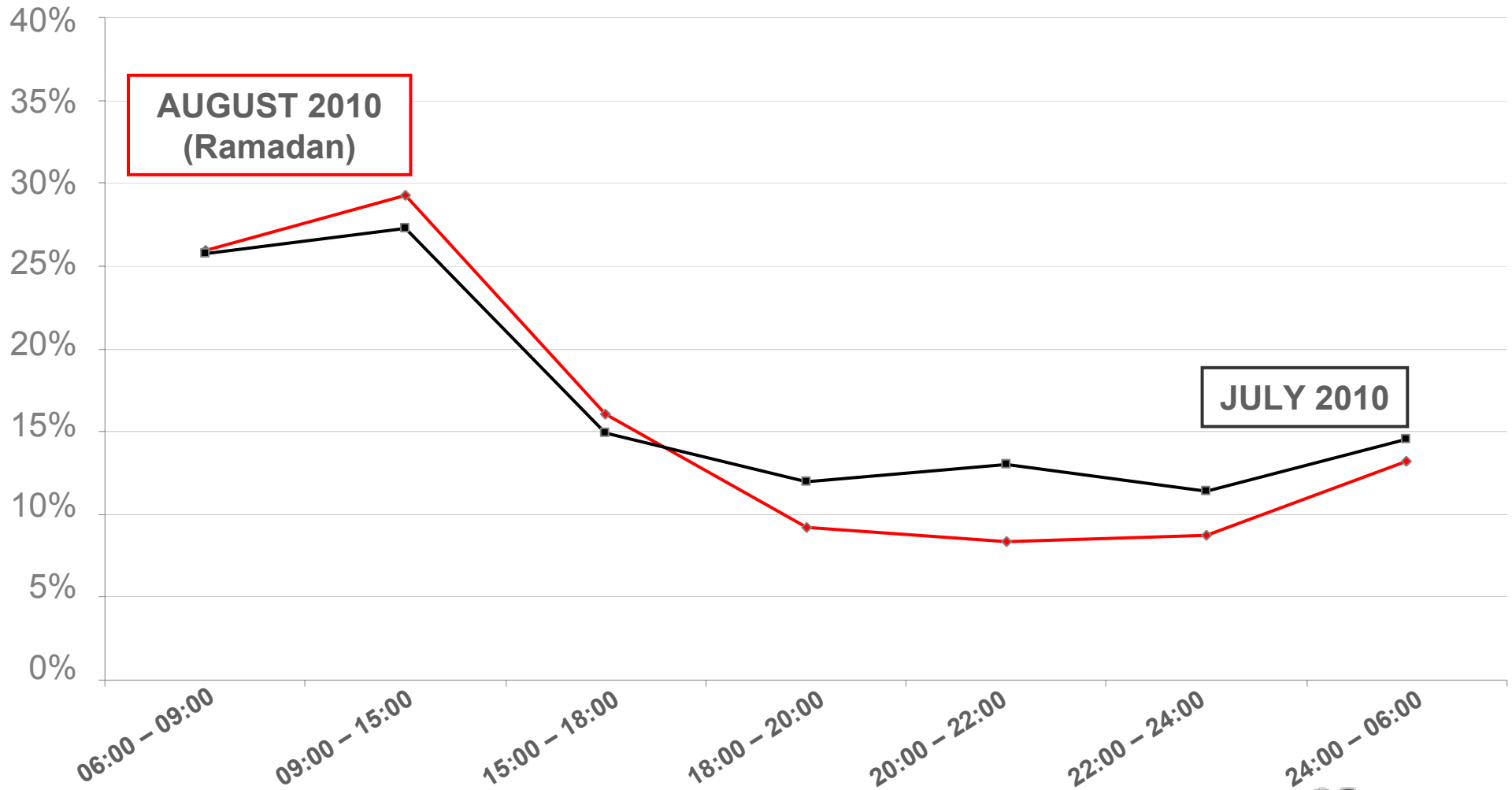
Audience share of TV viewing



Audience share of print media



Audience share of Internet



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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