Mobile data usage & habits of MENA Internet users

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

January 2011

Key findings

– **45% of MENA Internet users use mobile phones to access the Internet.**
  – 45% of all Middle East & North Africa Internet users surveyed use their mobile phones to access the Internet, rising to 50% among Internet users in the United Arab Emirates.

– **71% of mobile Internet users rank email as biggest mobile data activity.**
  – Email ranked as the number one mobile Internet activity in MENA, followed by social networking (34%), news & weather (29%), sports news (29%) and hobbies (25%).

– **Mobile access habits of male & female users differ significantly.**
  – Female mobile Internet users surveyed in MENA were more likely to use photo and video sharing websites and applications than their male counterparts. Female users were also more likely to play games via mobile applications, whilst male users were more likely to use their mobile phones to access sports news and information on their hobbies.

– **85% of MENA mobile Internet users surveyed have downloaded apps.**
  – 27% of those surveyed download more than one app per week to their mobile phones.

– **57% of MENA mobile Internet users plan to buy a tablet device.**
  – 49% of all MENA Internet users surveyed plan to buy a tablet before end of February.

Survey methodology

- The Effective Measure | Spot On PR survey was carried out between November 20th and December 5th, 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=12,754.

Demographics of respondents

Demographics of respondents (All)

Residence location of respondents

Egypt, 54%

Levant (Lebanon, Jordan, Syria), 8%

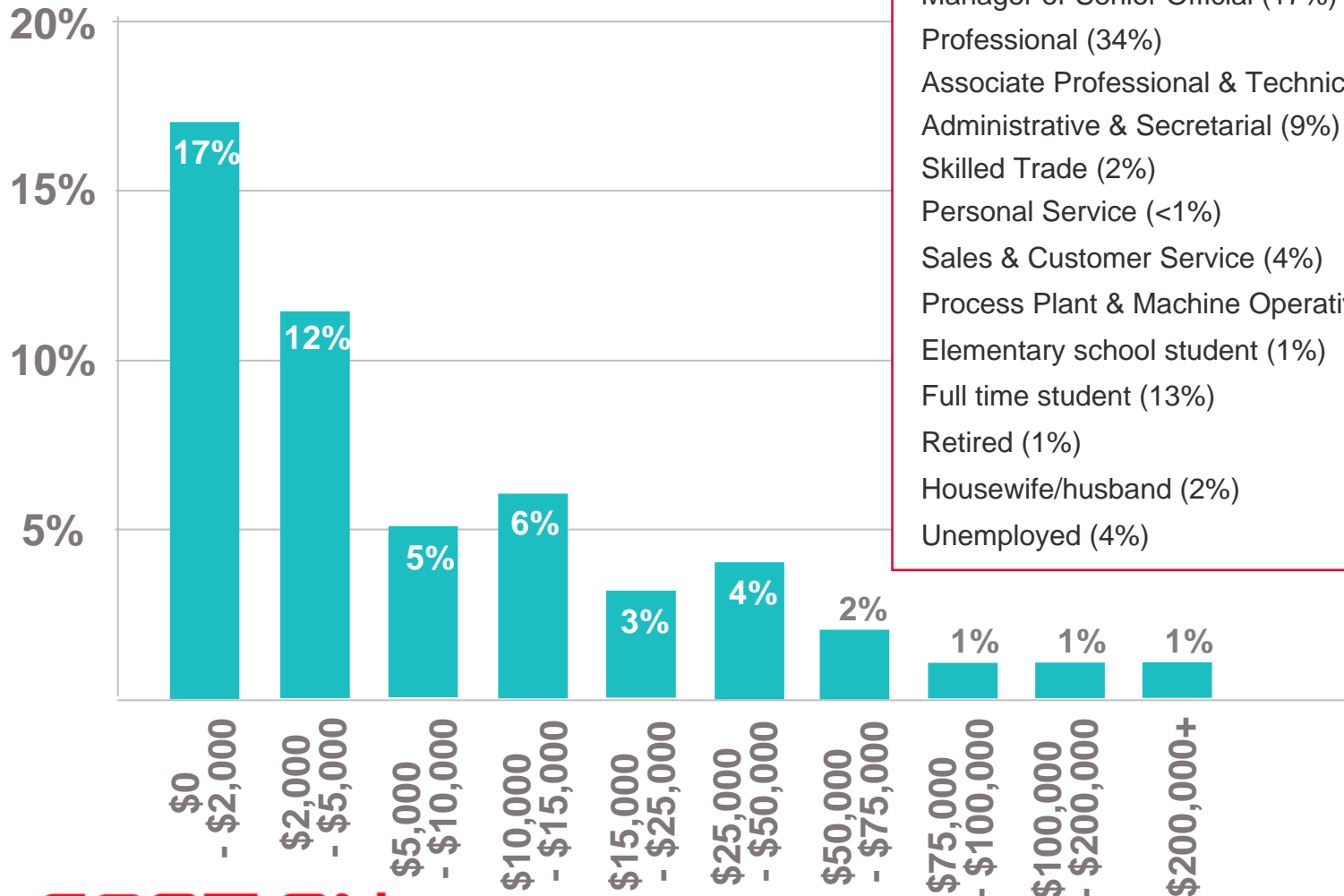North Africa (excl. Egypt), 11%
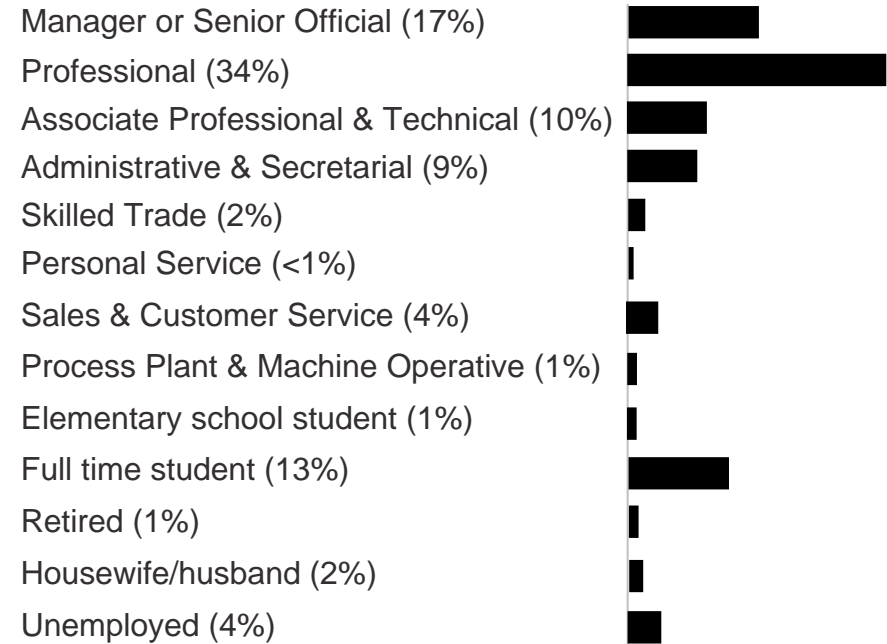
GCC, 26%
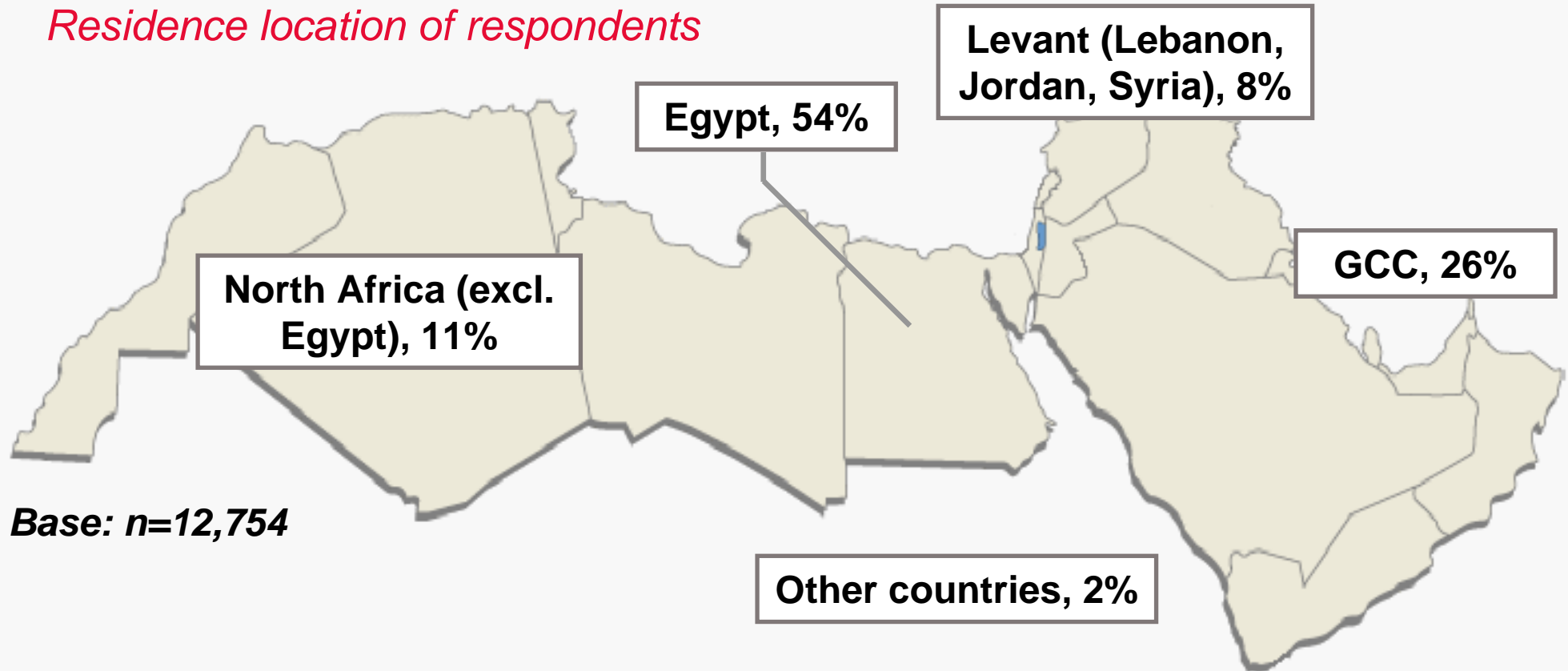
Other countries, 2%

Base: n=12,754

– 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 (All)

GROSS HOUSEHOLD INCOME (US$ /YEAR)

OCCUPATION

- Manager or Senior Official (17%)
- Professional (34%)
- Associate Professional & Technical (10%)
- Administrative & Secretarial (9%)
- Skilled Trade (2%)
- Personal Service (<1%)
- Sales & Customer Service (4%)
- Process Plant & Machine Operative (1%)
- Elementary school student (1%)
- Full time student (13%)
- Retired (1%)
- Housewife/husband (2%)
- Unemployed (4%)

Income chart:
- $0 - $2,000: 17%
- $2,000 - $5,000: 12%
- $5,000 - $10,000: 5%
- $10,000 - $15,000: 6%
- $15,000 - $25,000: 3%
- $25,000 - $50,000: 4%
- $50,000 - $75,000: 2%
- $75,000 - $100,000: 1%
- $100,000 - $200,000: 1%
- $200,000+: 1%

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Source: Effective Measure | Spot On PR

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Demographics of respondents (All)

AGE OF RESPONDENTS

Years of age

Age	Percentage
>60	0.58%
55-60	1%
51-54	2%
45-50	4%
41-44	4%
35-40	10%
31-34	11%
25-30	23%
21-24	19%
18-20	13%
15-17	11%

0%   5%   10%   15%   20%   25%

GENDER

	MALE	FEMALE
>60	<1%	<1%
55-60	1%	<1%
51-54	1.8%	1%
45-50	5%	3%
41-44	5%	3%
35-40	10%	9%
31-34	11%	10%
25-30	23%	23%
21-24	19%	19%
18-20	13%	16%
15-17	10%	14%

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Source: Effective Measure | Spot On PR

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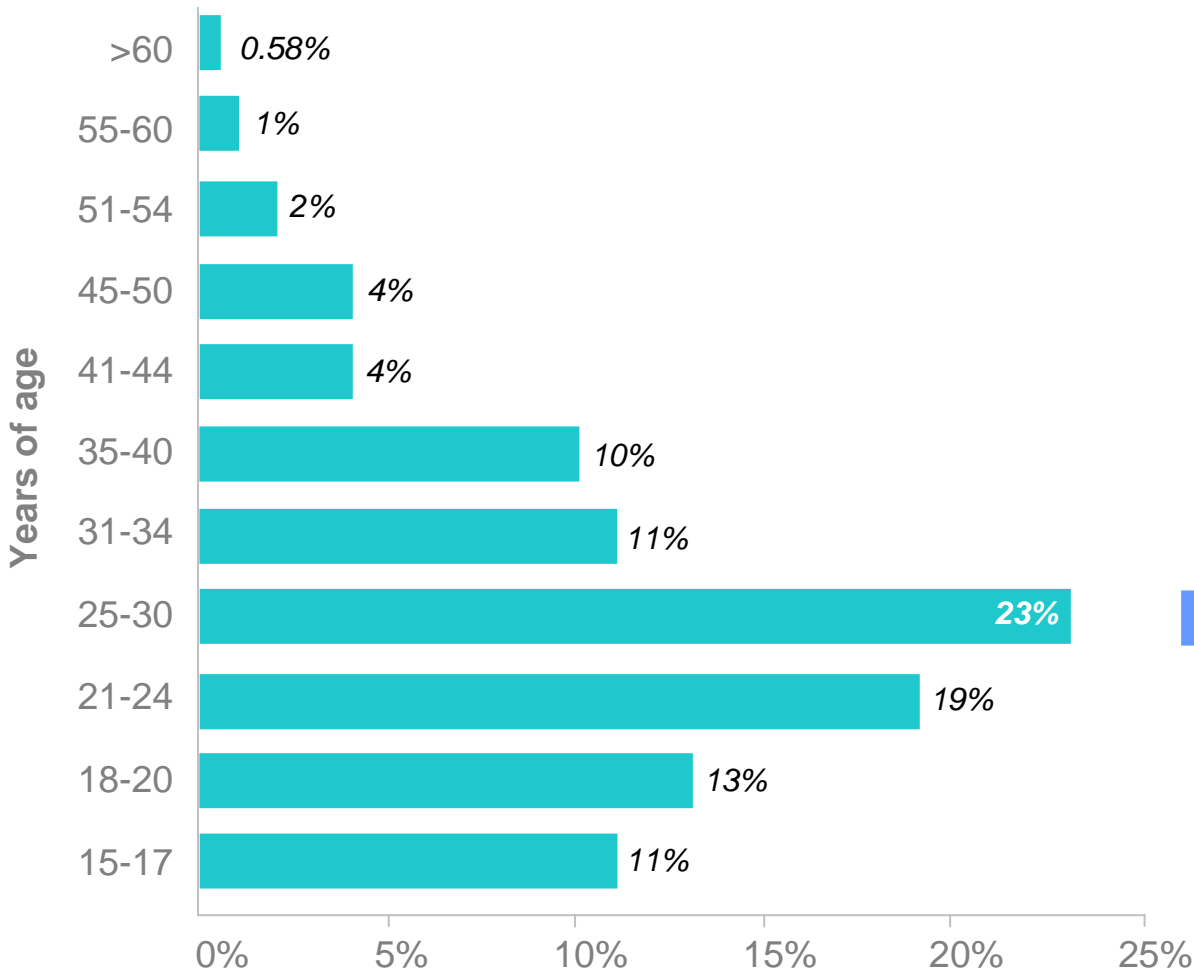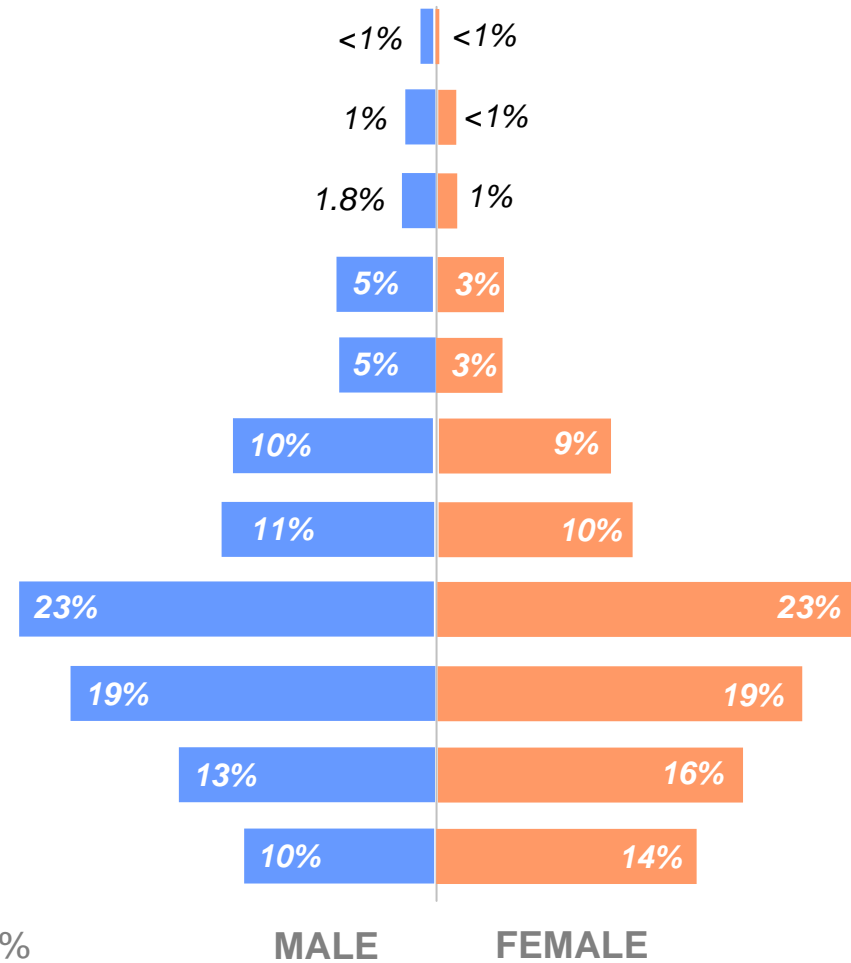
Demographics of respondents (All)

69% of Internet users surveyed have a tertiary education

No formal education	1%
Primary	3%
Secondary	22%
Tertiary (graduate degree)	56%
Tertiary (post graduate degree)	13%
Trade/certificate	5%

0% 10% 20% 30% 40% 50% 60%
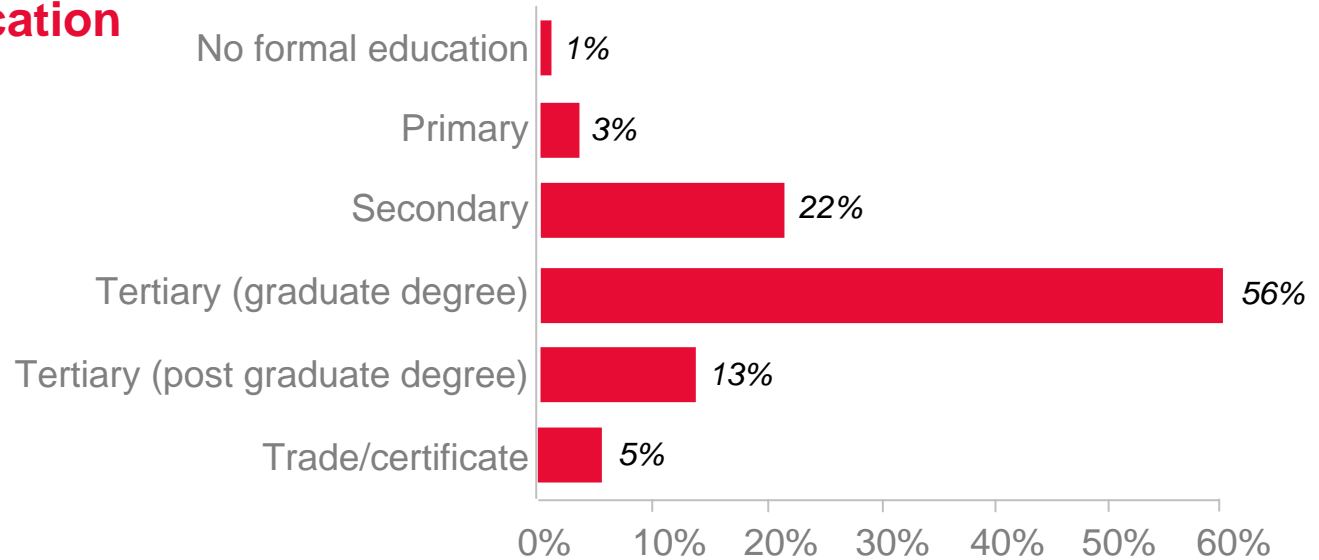
70% of users access the Internet from their homes

Home	70%
Work	21%
Internet café	5%
Education institution	1%
On the move	3%

0% 10% 20% 30% 40% 50% 60%

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Source: Effective Measure | Spot On PR

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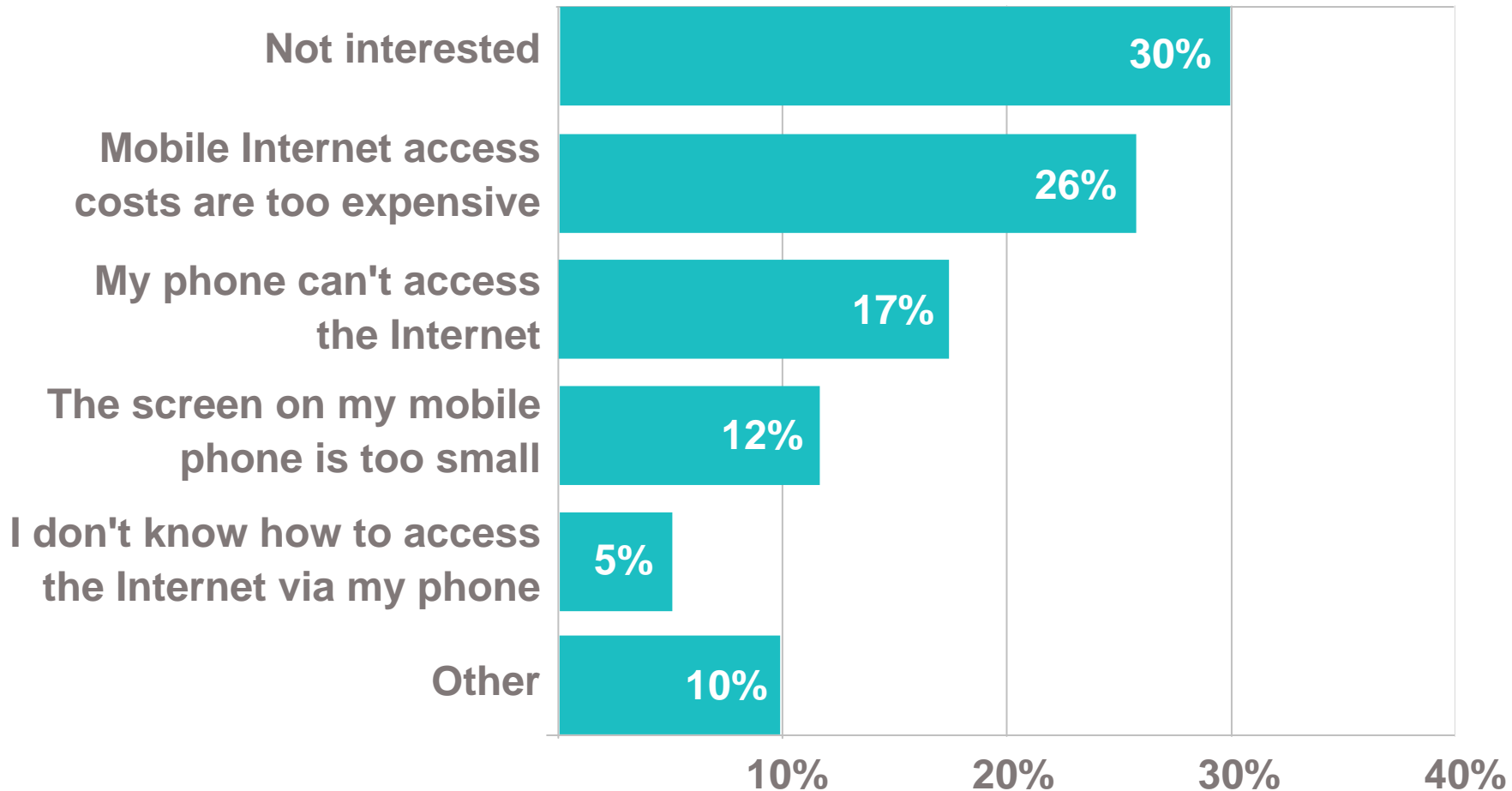measure
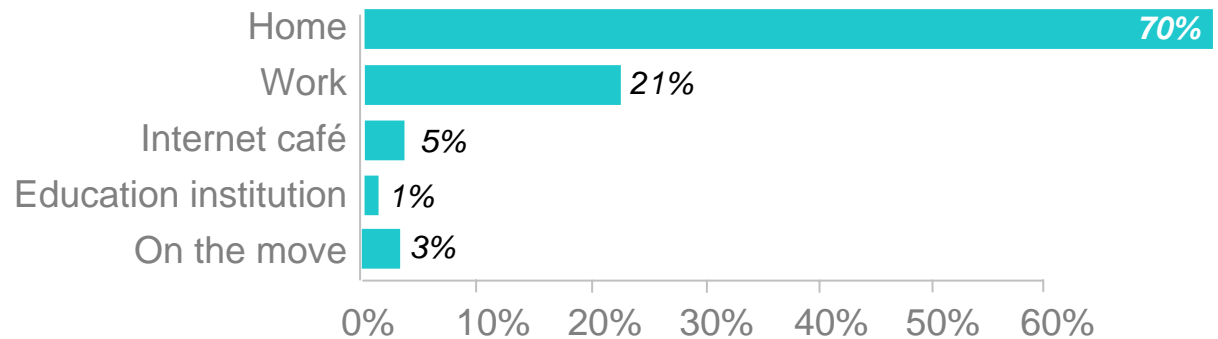
Mobile Internet users

Internet users accessing via mobile phone

ALMOST 50% OF INTERNET USERS SURVEYED IN EGYPT, SAUDI ARABIA & UAE USE THE MOBILE INTERNET; THIS COMPARES WITH MORE THAN 50% IN BAHRAIN & QATAR

Source: Effective Measure | Spot On PR (n=7,502)
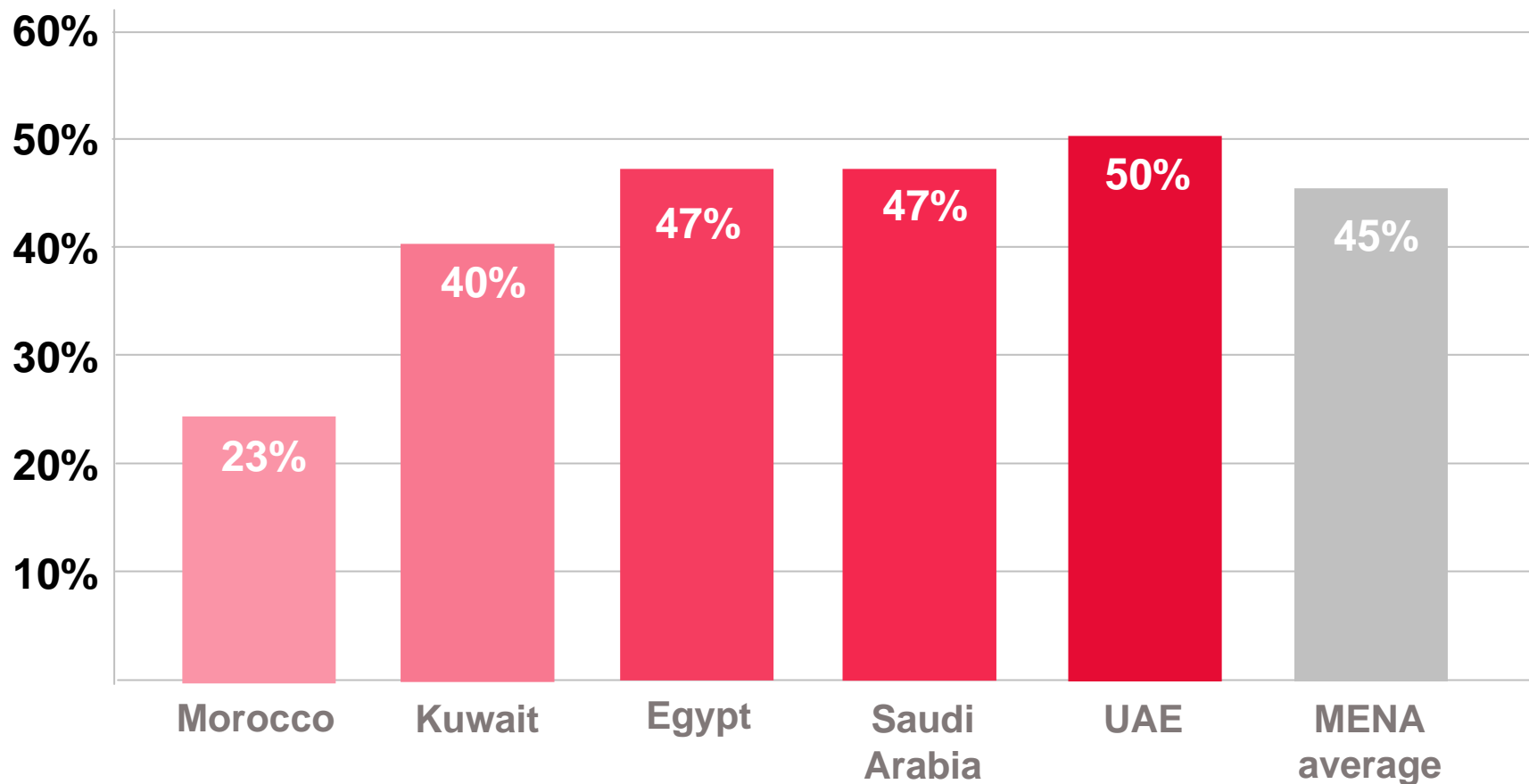
Reasons for not using mobile Internet (MENA)

30% OF MENA INTERNET USERS ARE CURRENTLY NOT INTERESTED IN USING THEIR MOBILE DEVICES TO ACCESS THE INTERNET

Reason	Percentage
Not interested	30%
Mobile Internet access costs are too expensive	26%
My phone can't access the Internet	17%
The screen on my mobile phone is too small	12%
I don't know how to access the Internet via my phone	5%
Other	10%

Source: Effective Measure | Spot On PR (n=4142)

Age & gender of mobile Internet users (MENA)

MOBILE INTERNET USERS

Years of age	MALE	FEMALE
>60	<1%	<1%
55-60	<1%	<1%
51-54	1%	1%
45-50	3%	2%
41-44	4%	3%
35-40	11%	8%
31-34	12%	9%
25-30	25%	27%
21-24	20%	20%
18-20	13%	17%
15-17	9%	12%

INTERNET USERS

Years of age	MALE	FEMALE
>60	<1%	<1%
55-60	1%	<1%
51-54	1.8%	1%
45-50	5%	3%
41-44	5%	3%
35-40	10%	9%
31-34	11%	10%
25-30	23%	23%
21-24	19%	19%
18-20	13%	16%
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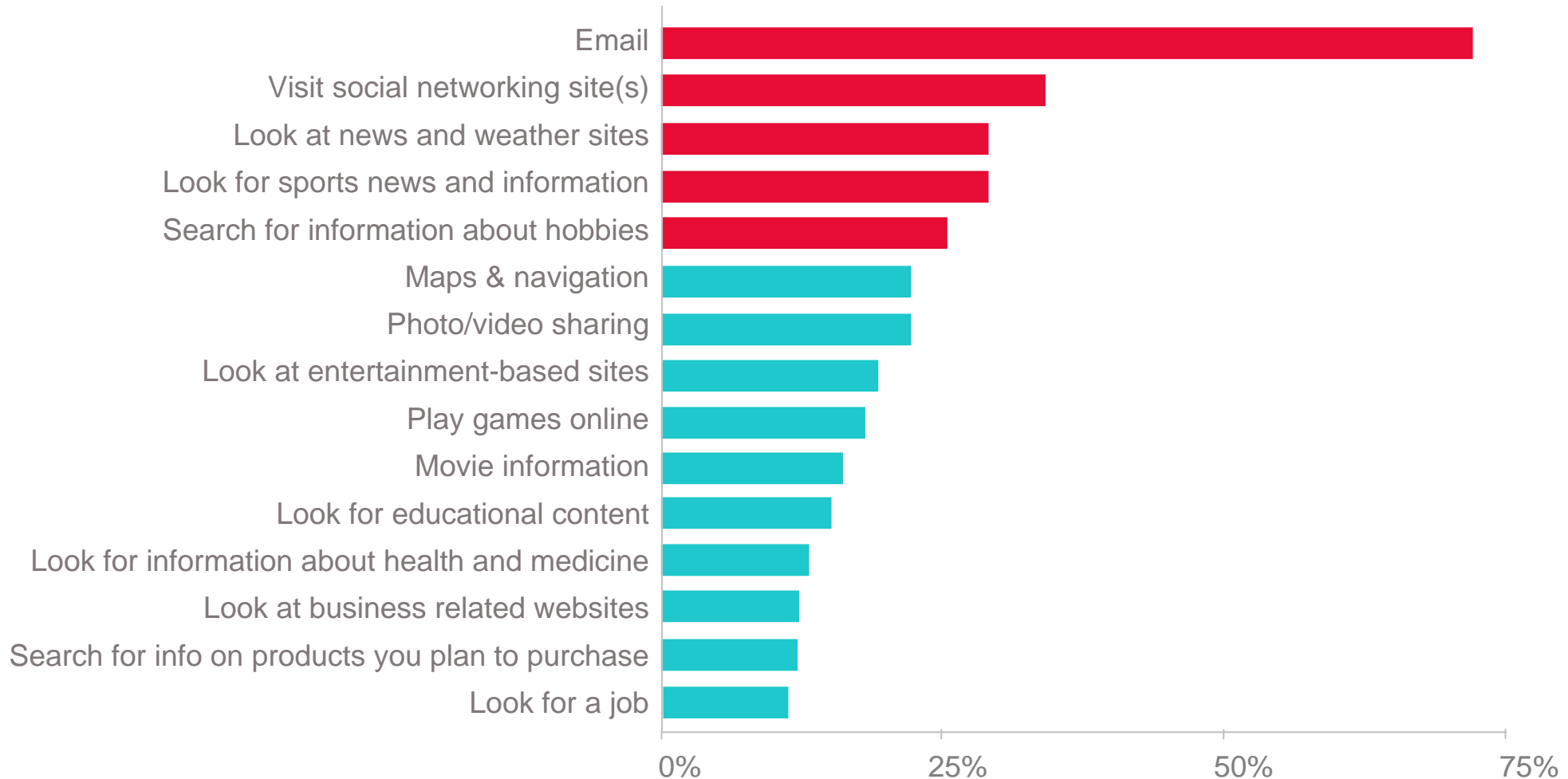measure

Source: Effective Measure | Spot On PR (n=3375, n=12754)

Mobile access habits

Types of mobile online activity most pursued (MENA)

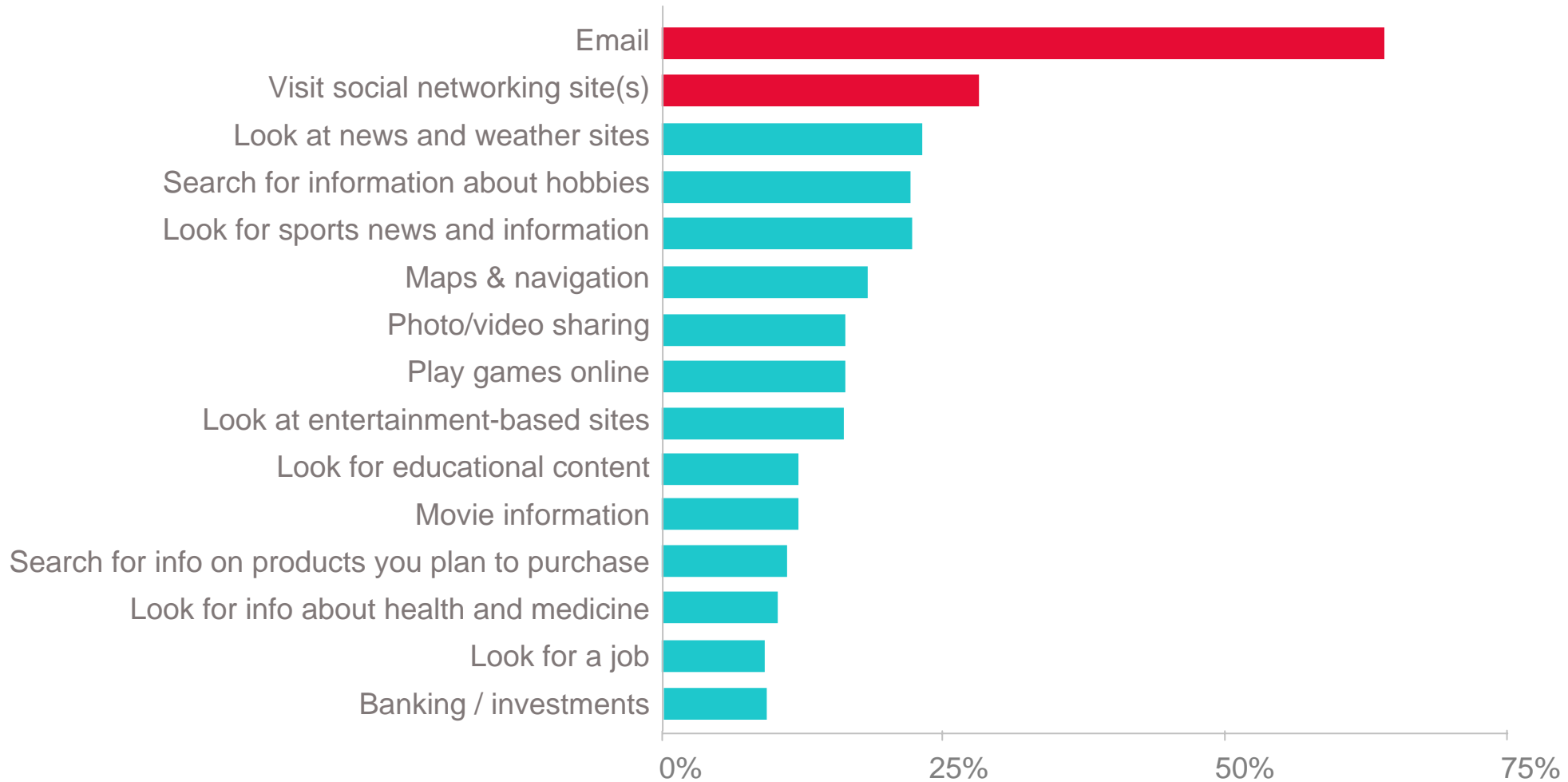**What type of activities do you do most use your mobile phone's Internet browser for?**

Top 15 responses of survey

Activity	
Email	
Visit social networking site(s)	
Look at news and weather sites	
Look for sports news and information	
Search for information about hobbies	
Maps & navigation	
Photo/video sharing	
Look at entertainment-based sites	
Play games online	
Movie information	
Look for educational content	
Look for information about health and medicine	
Look at business related websites	
Search for info on products you plan to purchase	
Look for a job	

0%   25%   50%   75%

Source: Effective Measure | Spot On PR (n=3375)

Types of mobile application use (MENA)

What activities do you use mobile phone applications for?

Top 15 responses of survey

Activity	
Email	
Visit social networking site(s)	
Look at news and weather sites	
Search for information about hobbies	
Look for sports news and information	
Maps & navigation	
Photo/video sharing	
Play games online	
Look at entertainment-based sites	
Look for educational content	
Movie information	
Search for info on products you plan to purchase	
Look for info about health and medicine	
Look for a job	
Banking / investments	

0%   25%   50%   75%

Top reasons for using mobile Internet by gender (MENA)

MALE

Mobile browsing (top 5 activities)

Email (71%)

Visit social networking sites (33%)

Sports news & information (32%)

News & weather information (30%)

Information on hobbies (25%)

Mobile apps (top 5 activities)

Email (64%)

Visit social networking sites (27%)

Sports news & information (24%)

News & weather information (24%)

Information on hobbies (22%)
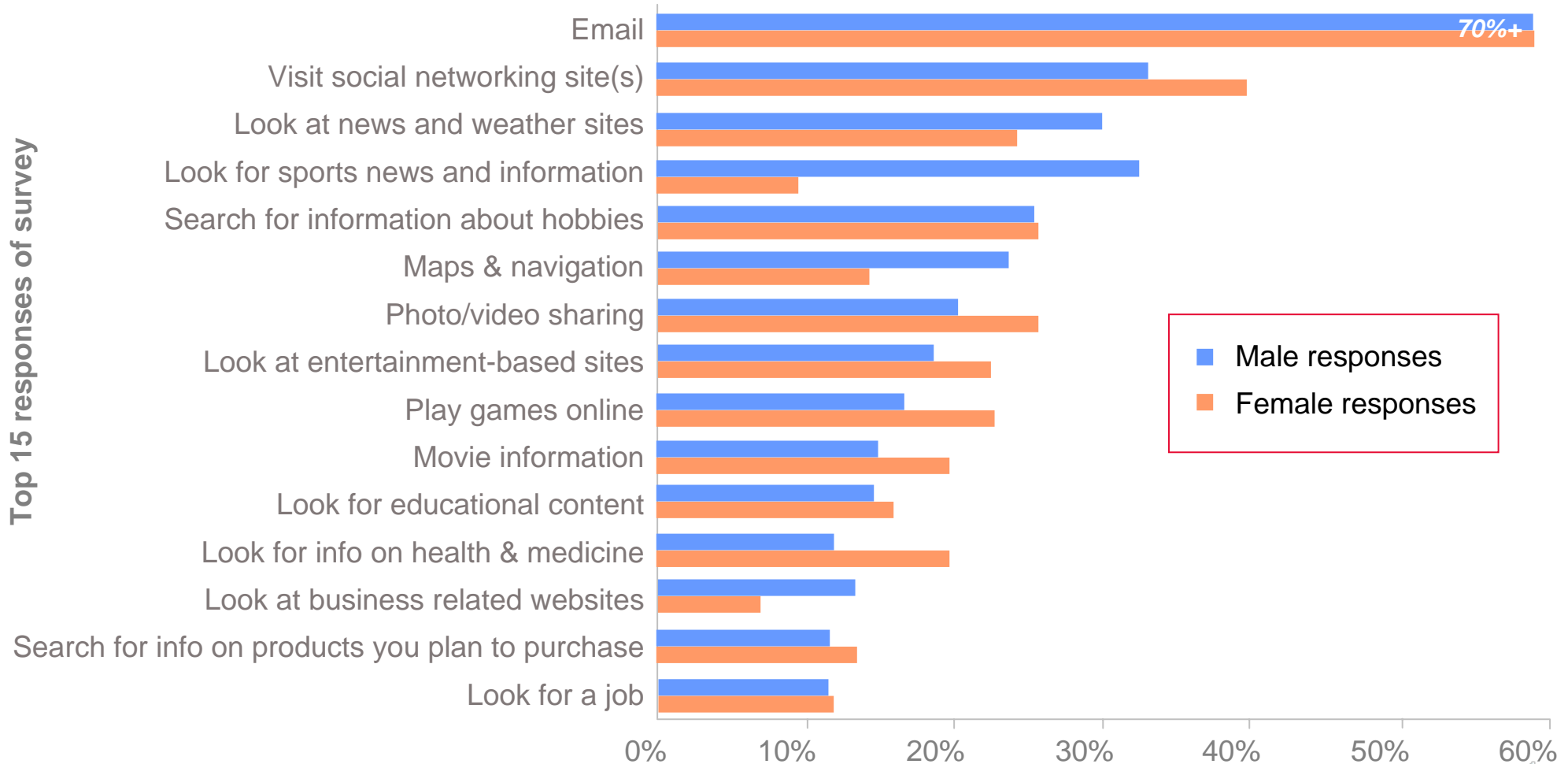
FEMALE

Mobile browsing (top 5 activities)

Email (73%)

Visit social networking sites (40%)

Information on hobbies (25%)

Photo & video sharing (25%)

News & weather information (24%)

Mobile apps (top 5 activities)

Email (67%)

Visit social networking sites (34%)

Information on hobbies (22%)
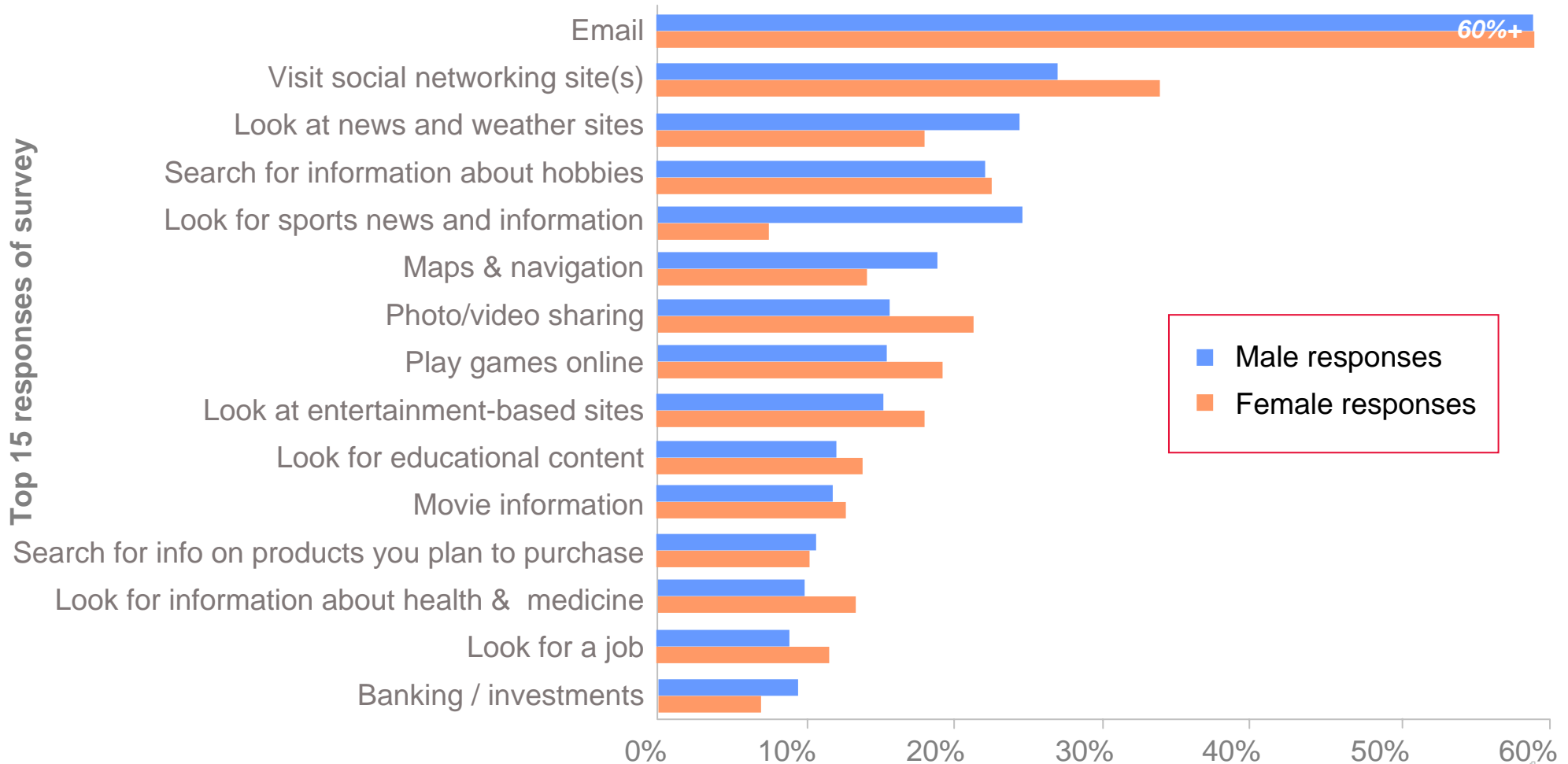
Photo & video sharing (21%)

Play online games (19%)

Types of mobile online activity, by gender (MENA)

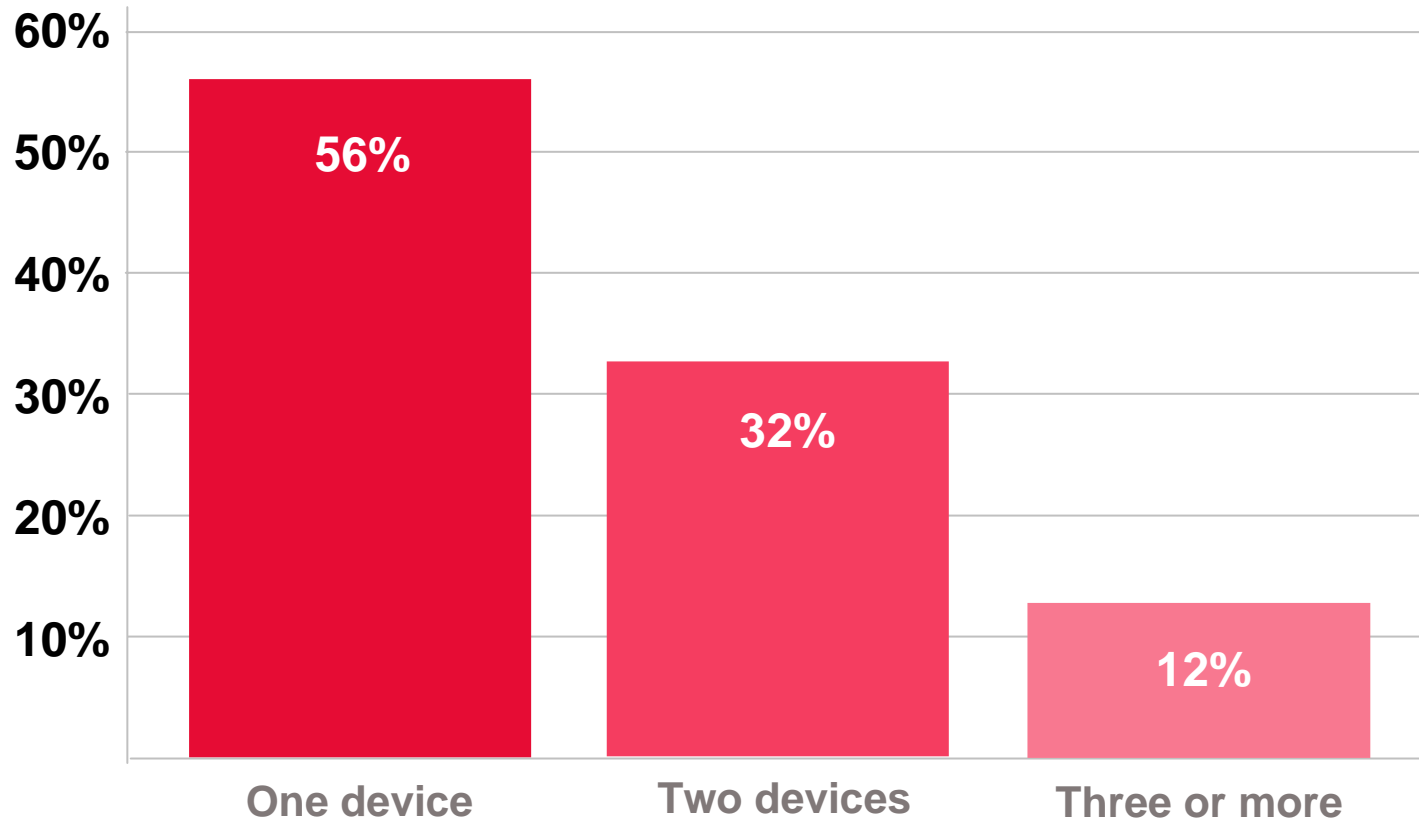**What type of activities do you do most use your mobile phone's Internet browser for?**

Top 15 responses of survey

- Email — 70%+
- Visit social networking site(s)
- Look at news and weather sites
- Look for sports news and information
- Search for information about hobbies
- Maps & navigation
- Photo/video sharing
- Look at entertainment-based sites
- Play games online
- Movie information
- Look for educational content
- Look for info on health & medicine
- Look at business related websites
- Search for info on products you plan to purchase
- Look for a job

■ Male responses
■ Female responses

0% 10% 20% 30% 40% 50% 60%

Source: Effective Measure | Spot On PR (n=3375)

Types of mobile app use, by gender (MENA)

What activities do you use mobile phone applications for?

Top 15 responses of survey

Activity	
Email	60%+
Visit social networking site(s)	
Look at news and weather sites	
Search for information about hobbies	
Look for sports news and information	
Maps & navigation	
Photo/video sharing	
Play games online	
Look at entertainment-based sites	
Look for educational content	
Movie information	
Search for info on products you plan to purchase	
Look for information about health & medicine	
Look for a job	
Banking / investments	

- ■ Male responses
- ■ Female responses

0% 10% 20% 30% 40% 50% 60%

Source: Effective Measure | Spot On PR (n=3375)

Mobile ownership, app & service spending

How many mobile phones do you own? (MENA)

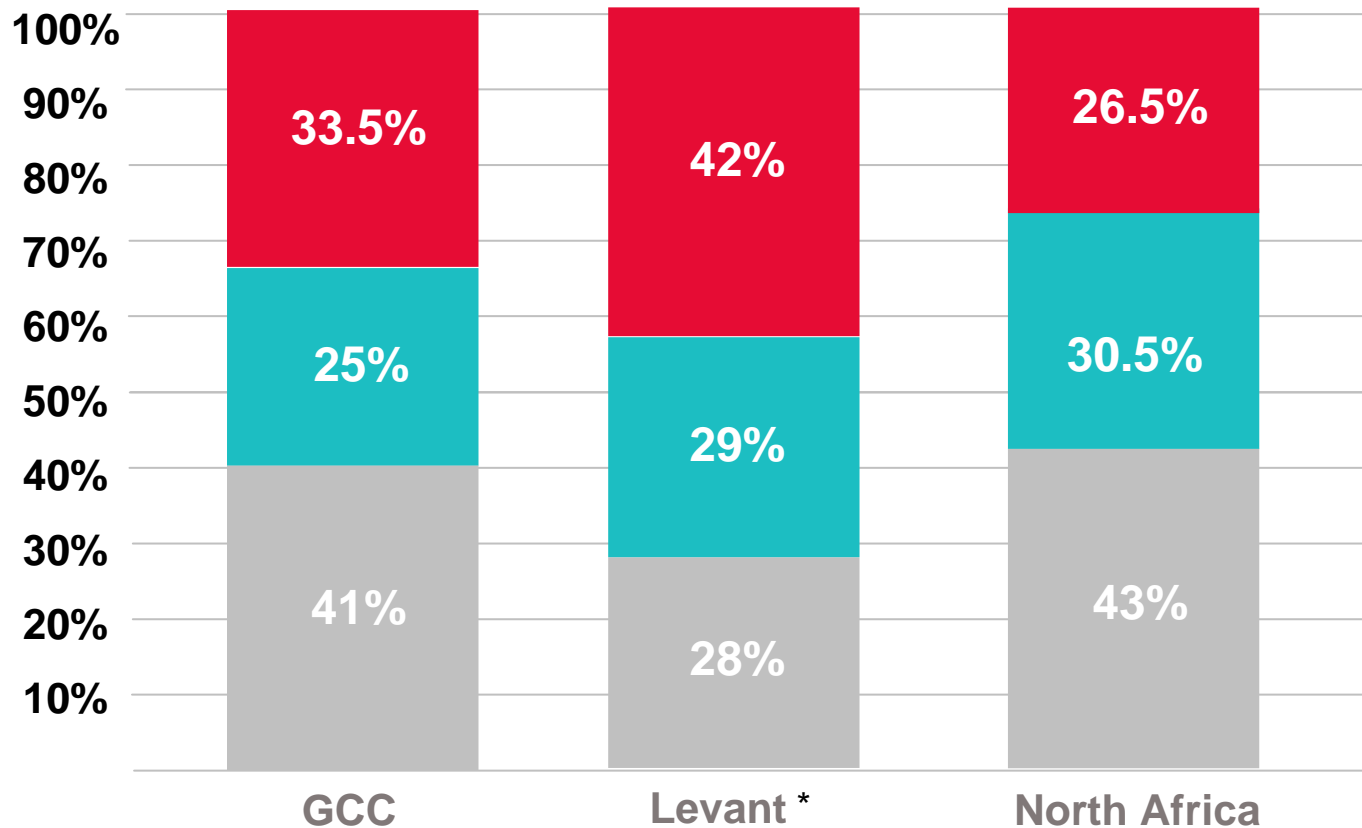**44% OF MOBILE INTERNET USERS USE MORE THAN ONE MOBILE PHONE**

Q. How many internet enabled phones do you personally use?

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Source: Effective Measure | Spot On PR (n=3375)

Mobile Internet subscriber packages

What type of data package do you have for your internet enabled phone?

Legend:
- Unlimited data package (grey)
- Capped data package (teal)
- Data usage billed monthly (red)

	GCC	Levant *	North Africa
Data usage billed monthly	33.5%	42%	26.5%
Capped data package	25%	29%	30.5%
Unlimited data package	41%	28%	43%

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* Percentages don't add up to 100% due to rounding of decimals

Source: Effective Measure | Spot On PR (n=3375)

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User preferences for Internet roaming (MENA)

When you travel outside of your country, do you use your operator's roaming Internet service?

	GCC	LEVANT	NORTH AFRICA	MENA AVERAGE
I always use my operator's roaming service when I travel	23%	21%	22%	22%
I sometimes use my operator's roaming service when I travel	42%	33%	35%	37%
I never use my operator's roaming service when I travel	34%	46%	43%	41%

Source: Effective Measure | Spot On PR (n=3375)

Mobile app download habits (MENA)

85% of mobile Internet users download mobile apps
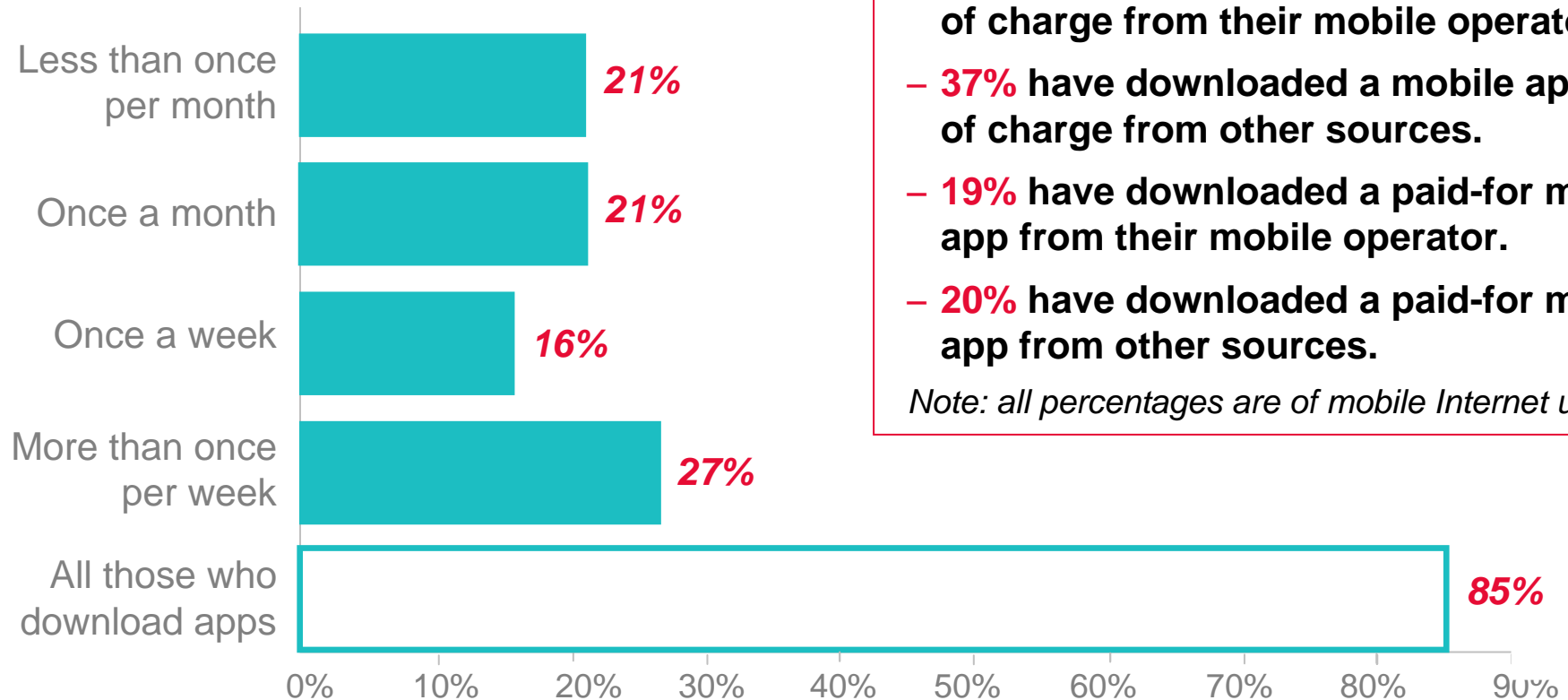
Who pays for mobile apps?

- **61%** have downloaded a mobile app free of charge from their mobile operator.
- **37%** have downloaded a mobile app free of charge from other sources.
- **19%** have downloaded a paid-for mobile app from their mobile operator.
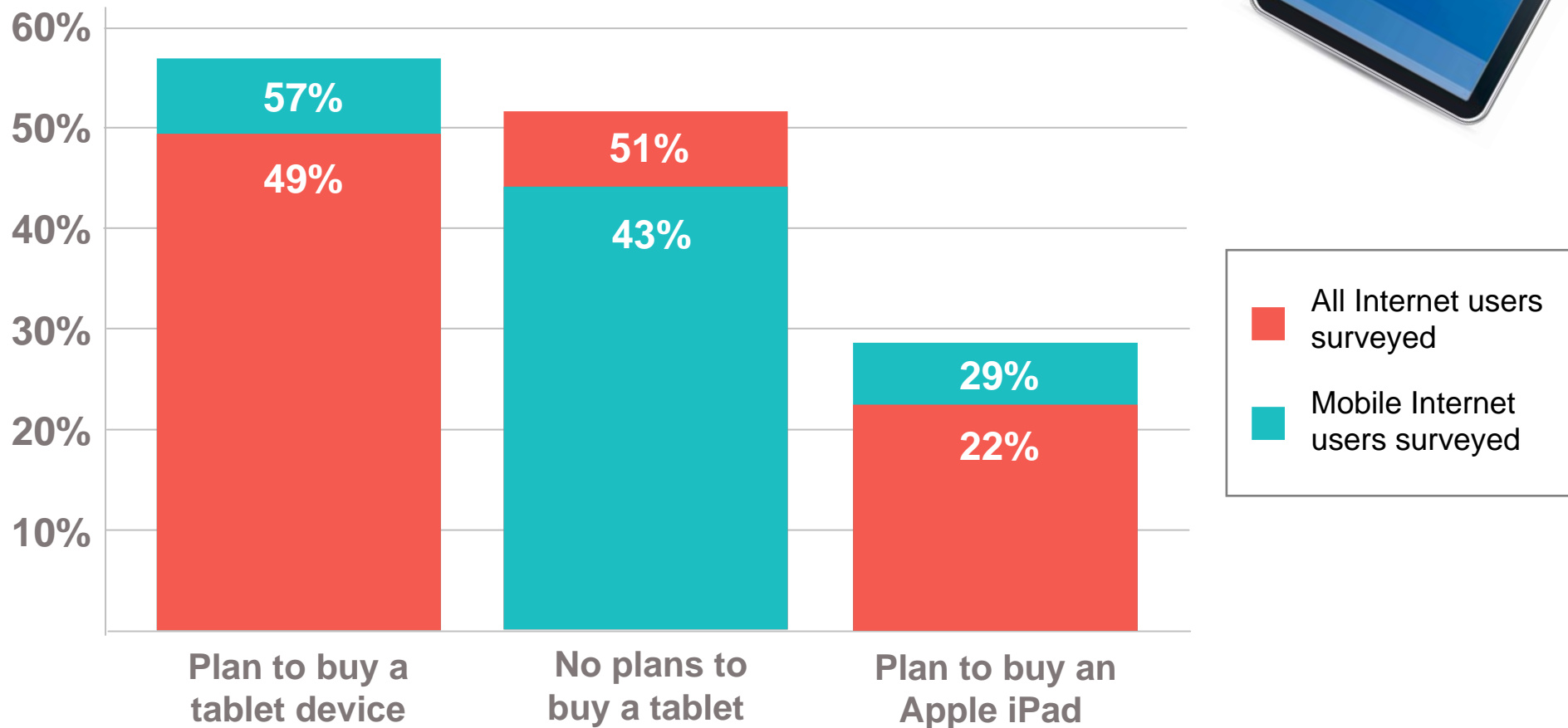- **20%** have downloaded a paid-for mobile app from other sources.

Note: all percentages are of mobile Internet users.

Chart data:
- Less than once per month: **21%**
- Once a month: **21%**
- Once a week: **16%**
- More than once per week: **27%**
- All those who download apps: **85%**

Q. How often do you download new applications for your mobile phone?
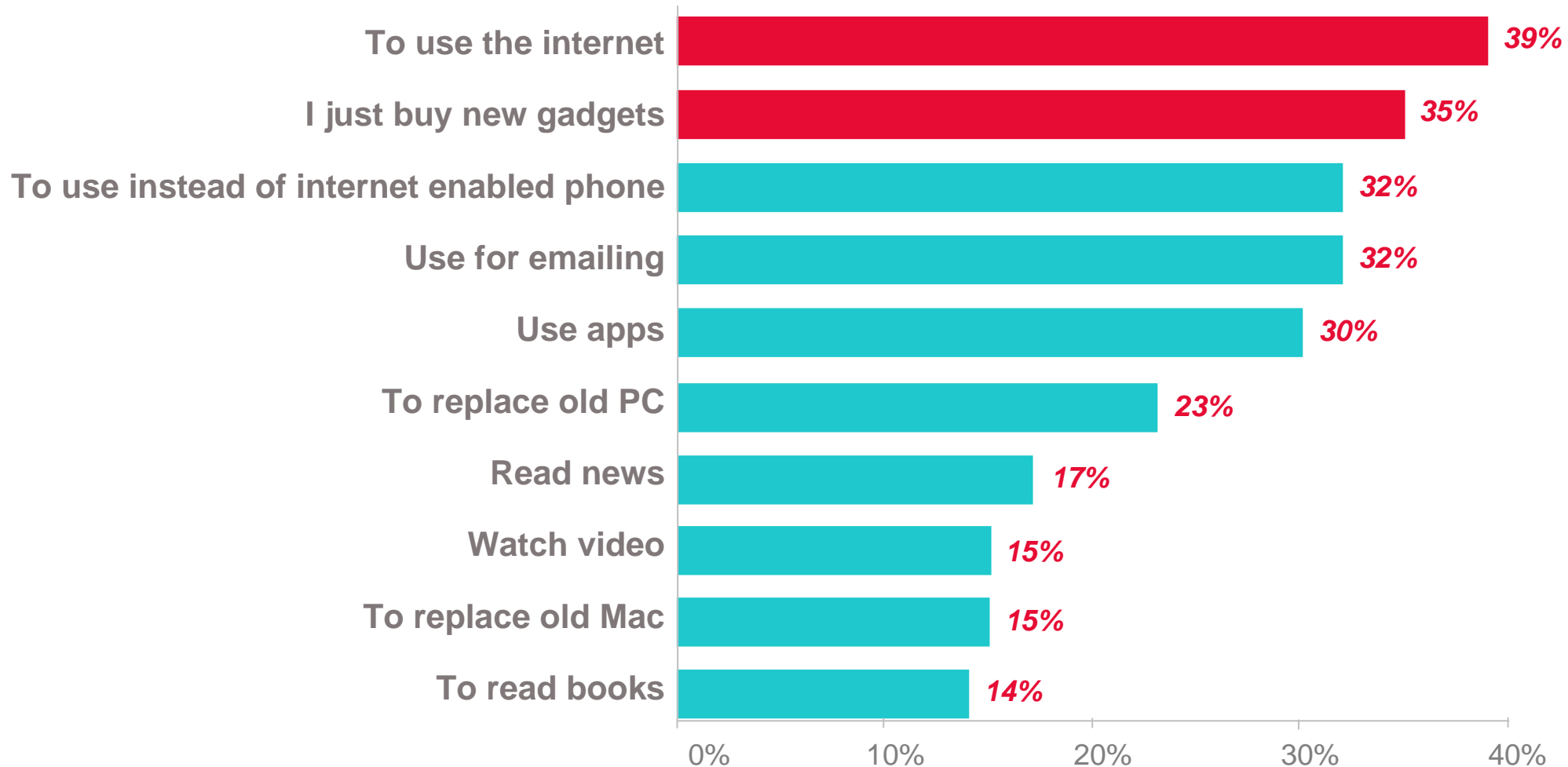
Tablet device buying

Interest in tablet devices (MENA)

49% OF MENA INTERNET USERS AND 57% OF MOBILE INTERNET USERS PLAN TO BUY TABLET DEVICES (DURING DEC '10 -FEB '11 PERIOD)

Legend:
- All Internet users surveyed
- Mobile Internet users surveyed

Chart data:

Plan to buy a tablet device
- 57%
- 49%

No plans to buy a tablet
- 51%
- 43%

Plan to buy an Apple iPad
- 29%
- 22%

Source: Effective Measure | Spot On PR (n=3375)

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Motivators for tablet buying plans (MENA)

Why would you buy a tablet device? *(asked of mobile Internet users)*

Motivator	Percentage
To use the internet	39%
I just buy new gadgets	35%
To use instead of internet enabled phone	32%
Use for emailing	32%
Use apps	30%
To replace old PC	23%
Read news	17%
Watch video	15%
To replace old Mac	15%
To read books	14%

Source: Effective Measure | Spot On PR (n=3375)

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.

For more information on Effective Measure contact:

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About Spot On Public Relations

Spot On Public Relations helps build brands online and offline. With 16 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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