Ipsos Online Audience Measurement in The Arab World

2013
• About the study
• Internet penetration
• General browsing behavior
• KSA ratings
• Egypt ratings
• Jordan ratings
• UAE ratings
• In-depth analysis
About The Study

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*

**Map Legend:**
- **Green**: Countries with penetration of over 50%
- **Blue**: Countries with penetration of lower than 50%
- **White**: Numbers displayed represent internet users per country

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**Table:**

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Population 15+</th>
<th>Internet Users</th>
<th>Internet Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total MENA</td>
<td>102,895,268</td>
<td>39,249,068</td>
<td>38%</td>
</tr>
<tr>
<td>GCC (KSA, UAE, Kuwait, Oman, Qatar)</td>
<td>26,711,000</td>
<td>16,220,813</td>
<td>61%</td>
</tr>
<tr>
<td>North Africa (Egypt-urban, Morocco)</td>
<td>43,071,000</td>
<td>12,940,822</td>
<td>30%</td>
</tr>
<tr>
<td>Levant (Lebanon, Syria, Jordan, Iraq)</td>
<td>33,113,268</td>
<td>10,087,433</td>
<td>30%</td>
</tr>
</tbody>
</table>
Internet Population Vs. Internet Penetration
MENA Markets Overview

<table>
<thead>
<tr>
<th>Internet penetration</th>
<th>Internet population</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE</td>
<td>71%</td>
</tr>
<tr>
<td>Kuwait</td>
<td>62%</td>
</tr>
<tr>
<td>Qatar</td>
<td>61%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>60%</td>
</tr>
<tr>
<td>Lebanon</td>
<td>52%</td>
</tr>
<tr>
<td>Jordan</td>
<td>48%</td>
</tr>
<tr>
<td>Morocco</td>
<td>35%</td>
</tr>
<tr>
<td>Syria</td>
<td>30%</td>
</tr>
<tr>
<td>Oman</td>
<td>28%</td>
</tr>
<tr>
<td>Egypt (Urban)</td>
<td>25%</td>
</tr>
<tr>
<td>Iraq</td>
<td>23%</td>
</tr>
</tbody>
</table>
MENA
General Browsing Behavior
Main Place of Accessing the Internet

- **87%** Access the internet from **home**
- **34%** Access the internet from **work**
- **14%** Access the internet from friends, **neighbors** or relatives house
- **13%** Access the internet from **other places**
- **7%** Access the internet from **school**
- **8%** Access the internet from **public place and internet cafes**
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

83% Saudis
17% Arabs

57% Males
43% Females

40% from 20-30 years old
24% from 31-40 years old
19% from 15-19 years old
17% from 40+ years old
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 – Internet Reach
Top 20 websites categories – Page Views
Top 20 websites categories – Visits

No. of Visits

Thousands

0 50,000 100,000 150,000 200,000 250,000

Search engine  Social Networks  Videos  News  Mail  Technology  Forums  Horizontal portals  Women  Governmental  Storage  Games  General  E-commerce  Banking  Sports  TV  Translation  Entertainment
Top 20 websites categories – Time spent per visit

Avg. Time Spent per Visit
Top 20 Websites

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

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
Egypt - Country Flavor

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

Number of Visits

Thousands

Social Networks
Search engine
Videos
News
Directory
Mail
Horizontal portal
Forums
General
Technology
Storage
Games
Women
Sports
Translation
E-commerce
Entertainment
Music
Encyclopedia
TV

0
20,000
40,000
60,000
80,000
100,000
120,000
140,000
160,000
180,000
200,000
220,000
240,000
260,000
280,000
300,000
320,000
340,000
360,000
380,000
400,000
420,000
440,000
460,000
480,000
500,000
520,000
540,000
560,000
580,000
600,000
620,000
640,000
660,000
680,000
700,000
720,000
740,000
760,000
780,000
800,000
820,000
840,000
860,000
880,000
900,000
920,000
940,000
960,000
980,000
1,000,000
1,020,000
1,040,000
1,060,000
1,080,000
1,100,000
1,120,000
1,140,000
1,160,000
1,180,000
1,200,000
1,220,000
1,240,000
1,260,000
1,280,000
1,300,000
1,320,000
1,340,000
1,360,000
1,380,000
1,400,000

Ipsos
Top 20 websites categories – Time spent per visit

Avg. Time Spent per Visit

0:23:02

0:14:24

0:11:31

0:08:38

0:05:46

0:02:53

0:00:00

Social Networks

Videos

Automotive

Dating

Religion

Forums

Search engine

Music

Telecom

Cooking

Women

Finance

Governmental

Classified

Travel and Tourism

E-commerce

Entertainment

Mail

Recruitment
Top 20 Websites

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

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

Reach - Internet
### Top 20 Websites

#### Based on Avg. Monthly Internet Reach

- facebook.com
- twoo.com
- youtube.com
- anchorfree.net
- contactcars.com
- christian-dogma.com
- alnaddy.com
- brooonzyah.net
- fatakat.com
- bezaat.com
- mawaly.com
- google.com.sa
- google.com.eg
- sm3na.com
- live.com
- jsoftj.com
- etisalat.com.eg
- Akhbarak.net
- fatafeat.com

#### Based on Page Views

- facebook.com
- twoo.com
- youtube.com
- anchorfree.net
- contactcars.com
- christian-dogma.com
- alnaddy.com
- brooonzyah.net
- fatakat.com
- bezaat.com
- mawaly.com
- google.com.sa
- google.com.eg
- sm3na.com
- live.com
- jsoftj.com
- etisalat.com.eg
- Akhbarak.net
- fatafeat.com

#### Based on No. of Visits

- facebook.com
- twoo.com
- youtube.com
- anchorfree.net
- contactcars.com
- christian-dogma.com
- alnaddy.com
- brooonzyah.net
- fatakat.com
- bezaat.com
- mawaly.com
- google.com.sa
- google.com.eg
- sm3na.com
- live.com
- jsoftj.com
- etisalat.com.eg
- Akhbarak.net
- fatafeat.com

#### Based on Avg. Time Spent per Visitor

- facebook.com
- twoo.com
- youtube.com
- anchorfree.net
- contactcars.com
- christian-dogma.com
- alnaddy.com
- brooonzyah.net
- fatakat.com
- bezaat.com
- mawaly.com
- google.com.sa
- google.com.eg
- sm3na.com
- live.com
- jsoftj.com
- etisalat.com.eg
- Akhbarak.net
- fatafeat.com
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 – Internet Reach
Top 20 websites categories – Page Views
Top 20 websites categories – Visits

Number of Visits
Top 20 Websites

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

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

facebook.com
google.jo
youtube.com
google.com
yahoo.com
alnaddy.com
mail.yahoo.com
live.com
maktoob.yahoo.com
ar.wikipedia.org
alwakeelnews.com
sarayaneWs.com
twitter.com
microsoft.com
y8.com
msn.com
en.wikipedia.org
fatakat.com
babylon.com
m5zn.com

Reach - Internet
Top 20 Websites

Based on Avg. Monthly Internet Reach
facebook.com
google.jo
youtube.com
google.com
live.com
kooora.com
yahoo.com
opensooq.com
alnaddy.com
awa2el.net
jawaker.com
sarayanews.com
mail.yahoo.com
alwakeelnews...
twitter.com
translate.google
khaberni.com
4shared.com
maktoob.yahoo
conduit.com

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor
Top 20 Websites

Based on Avg. Monthly Internet Reach

1. facebook.com
2. google.jo
3. youtube.com
4. google.com
5. alnaddy.com
6. yahoo.com
7. live.com
8. mail.yahoo.com
9. maktoob.yahoo.com
10. kooora.com
11. alwakeelnews.com
12. sarayanews.com
13. conduit.com
14. khaberni.com
15. babylon.com
16. twitter.com
17. orange.jo
18. msn.com
19. ask.com
20. jawaker.com

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor
Top 20 Websites

Based on Avg. Monthly Internet Reach

1. ammonnews.net
2. jawaker.com
3. aljazeera.net
4. facebook.com
5. tagged.com
6. youtube.com
7. opensooq.com
8. twoo.com
9. alquds.co.uk
10.almadenahnews.com

Based on Page Views

11. watnnews.net
12. panet.co.il
13. dubizzle.com
14. sarayanews.com
15. awa2el.net
16. yumyume.com
17. gerasanews.com
18. google.jo
19. alwatanvoice.com

Based on No. of Visits

20.

Based on Avg. Time Spent per Visitor

Time Spent per Visit

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

Ipsos

Monthly Internet Reach

Page Views

No. of Visits

Avg. Time Spent per Visitor
UAE Ratings
Internet Breakdown - UAE

4.7 Million Internet Population
71% Internet Penetration

72% Males
28% Females

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

Real estate 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
Top 20 websites categories – Visits

Number of Visits

Thousands

120,000
100,000
80,000
60,000
40,000
20,000
0

Search engine
Social Networks
Mail
Videos
Horizontal portal
News
Technology
Translation
E-commerce
General
Classified
Real Estate
Encyclopedia
Entertainment
Forums
Travel and Tourism
Games
Sports
Telecom
Storage
Top 20 websites categories – Time spent per visit

Avg. Time Spent per Visit

- Social Networks
- Videos
- Mail
- Real Estate
- Classified
- News
- Games
- General
- Search engine
- TV
- Travel and Tourism
- Sports
- Business
- Guide
- Education
- Technology
- Entertainment
- Storage
- Banking

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

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

Based on Avg. Monthly Internet Reach

Based on Page Views

Based on No. of Visits

Based on Avg. Time Spent per Visitor

Reach - Internet

0% 10% 20% 30% 40% 50% 60% 70% 80%

google.ae
youtube.com
facebook.com
google.com
yahoo.com
live.com
mail.yahoo.com
en.wikipedia.org
mail.google.com
microsoft.com
babylon.com
msn.com
skype.com
anchorfree.net
etisalat.ae
conduit.com
soon.com
twitter.com
adobe.com
bing.com
Top 20 Websites

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

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

KSA | Egypt | UAE | Jordan
---|---|---|---
3% | 2% | 11% | 8%
59% | 78% | 66% | 86%
33% | 17% | 20% | 18%
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%
- youm7.com: 13%
- ahram.org.eg: 10%
- elfagr.org: 8%

**UAE**
- gulfnews.com: 14%
- huffingtonpost.com: 9%
- bbc.co.uk: 5%
- khaleejtimes.com: 4%
<table>
<thead>
<tr>
<th>Country</th>
<th>Websites</th>
<th>UAE</th>
<th>KSA</th>
<th>Egypt</th>
<th>Jordan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>souq.com</td>
<td>20%</td>
<td>13%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>cobone.com</td>
<td>13%</td>
<td></td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>amazon.com</td>
<td>11%</td>
<td></td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Markavip.com</td>
<td>9%</td>
<td></td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>souq.com</td>
<td></td>
<td>13%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>sukar.com</td>
<td></td>
<td></td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>namshi.com</td>
<td></td>
<td></td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Markavip.com</td>
<td></td>
<td></td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>souq.com</td>
<td></td>
<td></td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>jumia.com</td>
<td></td>
<td></td>
<td></td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>alibaba.com</td>
<td></td>
<td></td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>amazon.com</td>
<td></td>
<td></td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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%
- dailymotion.com: 8%
- imdb.com: 6.3%
- cima4u.com: 0.38%

**Jordan**
- youtube.com: 68%
- dailymotion.com: 4%
- imdb.com: 3%
- dardarkom.com: 1%

**Egypt**
- youtube.com: 60%
- cima4u.com: 3%
- dailymotion.com: 3%
- imdb.com: 2%
**Top Storage Websites**, Ranked based on avg. Monthly Internet reach

**Jordan**
- m5zn.com: 14%
- 4shared.com: 12%
- gulfup.com: 3%
- drive.google.com: 3%

**KSA**
- m5zn.com: 13%
- gulfup.com: 11%
- 4shared.com: 11%
- imageshack.us: 5%

**Egypt**
- m5zn.com: 9%
- 4shared.com: 8%
- letitbit.net: 7%
- rapidshare.com: 6%

**UAE**
- 4shared.com: 5%
- m5zn.com: 4%
- drive.google.com: 3%
- dropbox.com: 2%
<table>
<thead>
<tr>
<th>Region</th>
<th>Website</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Jordan</strong></td>
<td>y8.com</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>g9g.com</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>gamezer.com</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>jawaker.com</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Egypt</strong></td>
<td>y8.com</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>travian.com.eg</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>g9g.com</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>travian.ae</td>
<td>4%</td>
</tr>
<tr>
<td><strong>KSA</strong></td>
<td>travian.com.sa</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>khanwars.ae</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>gamezer.com</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>g9g.com</td>
<td>5%</td>
</tr>
<tr>
<td><strong>UAE</strong></td>
<td>gamezer.com</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>khanwars.ae</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>travian.ae</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>91.com</td>
<td>2%</td>
</tr>
</tbody>
</table>
About Ipsos MediaCT

Ipsos MediaCT plays a prominent role within media and communications research, holding key industry audience measurement contracts and conducting bespoke research to assist their clients in informing their strategic decisions. We help clients make connections in the digital age, as leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecom and technology. Using a wide variety of research techniques, we help individual media owners, technology companies, agencies and advertisers address issues such as editorial and programming, advertising, audience profiling and music tastes, market positioning, piracy, high definition and theatrical markets, new product and programme development and license applications.

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