

# ARAB ADVISORS GROUP

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Arab Jordan Investment Bank Group

Arab Advisors Group provides reliable research, analysis and forecasts of Arab communications, media and technology markets.

Global Expertise - Regional Focus.



## Insights into Arab consumers broadcast and online consumption habits

**Jawad Abbassi**  
Founder, General Manager

Joint ITU - AICTO Workshop on  
"Interoperability of IPTV in the  
Arab region" - Dubai

September 20,21 2011

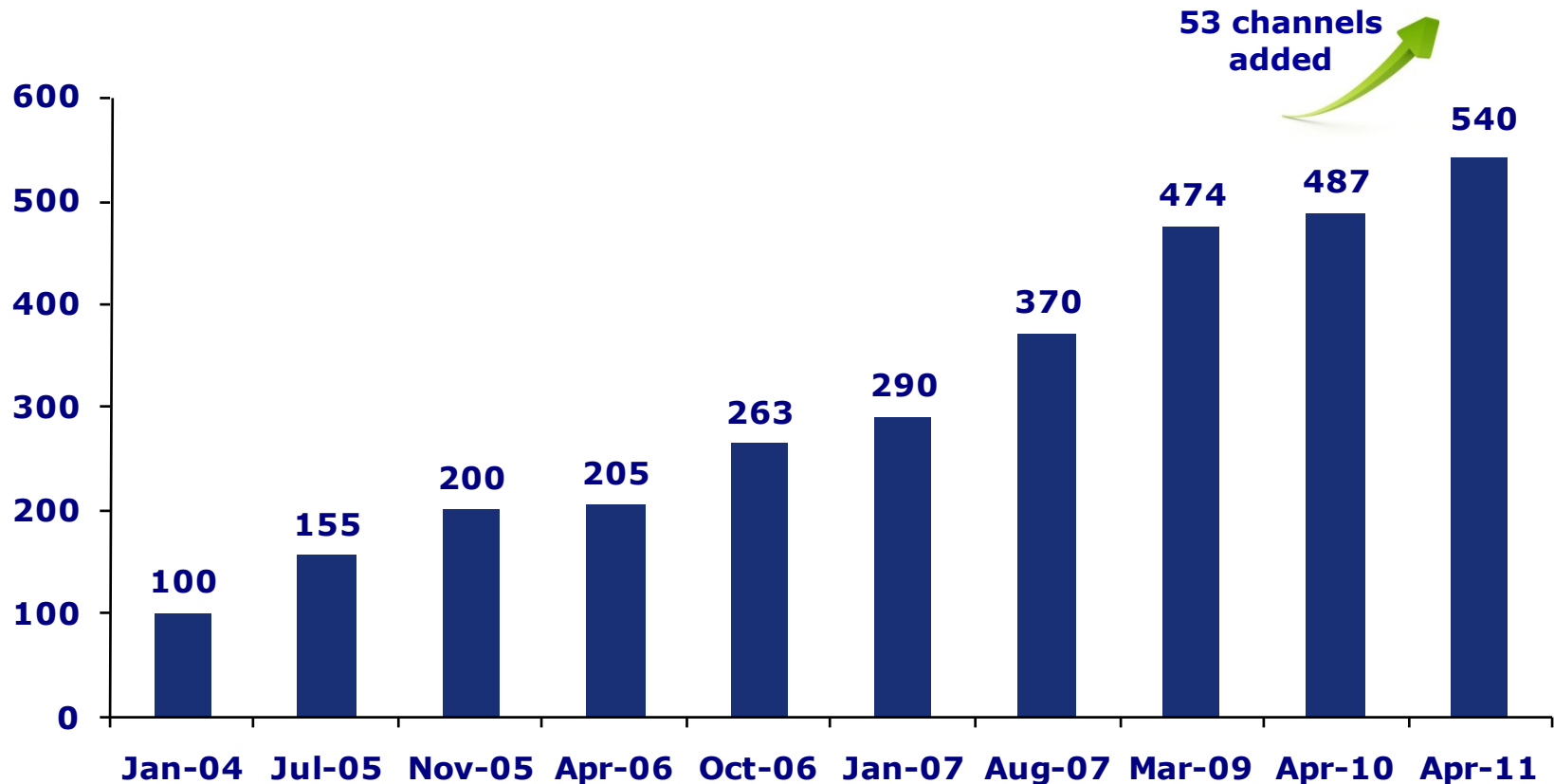
# Outline

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- The TV landscape in the region
- The Internet landscape
- Consumption patterns
- Smartphone findings in Jordan & UAE



# Continuous growth in Free-To-Air satellite TV channels



Note: The satellite systems included in the analysis are Arabsat, Nilesat and Noorsat  
Source: Arab Advisors Group's Satellite TV in the Arab World 2010, and Arab Advisors Group



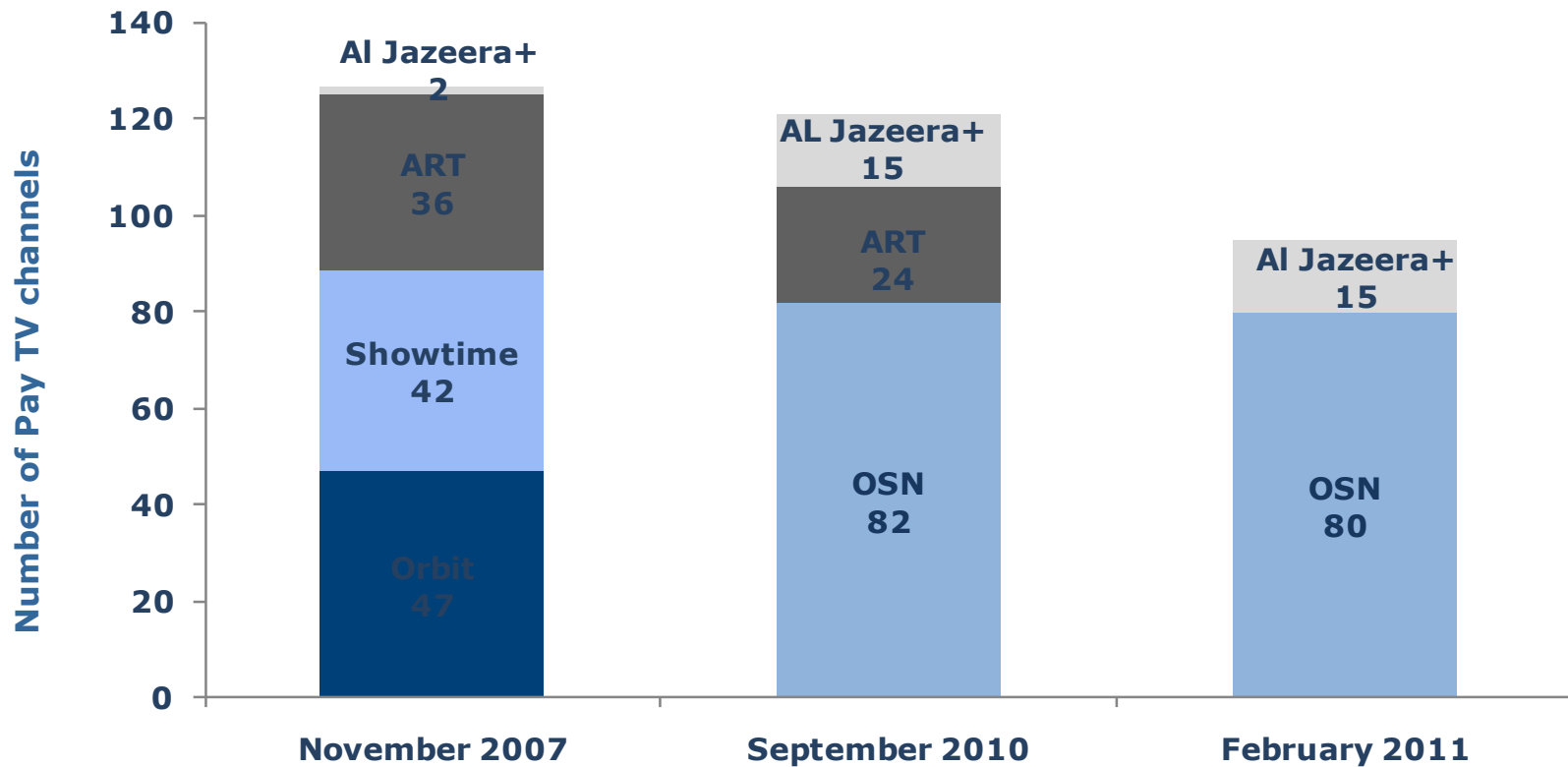
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# Consolidation at last in the Pay TV market: OSN with most channels.

## Consolidation of Pay TV providers



Source: Pay TV providers



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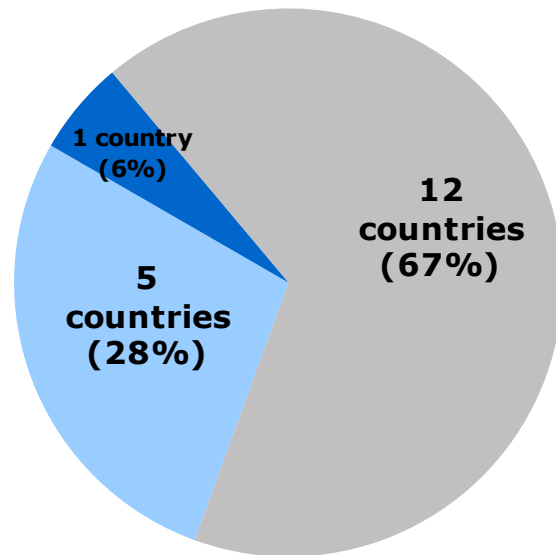
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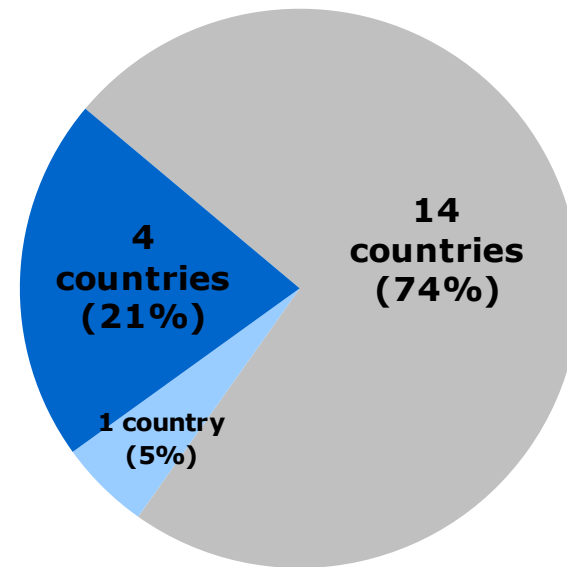
# Most of the Arab countries have competitive Internet markets

## Internet regulatory framework

2005



2011



■ Competitive

■ Duopoly

■ Monopoly



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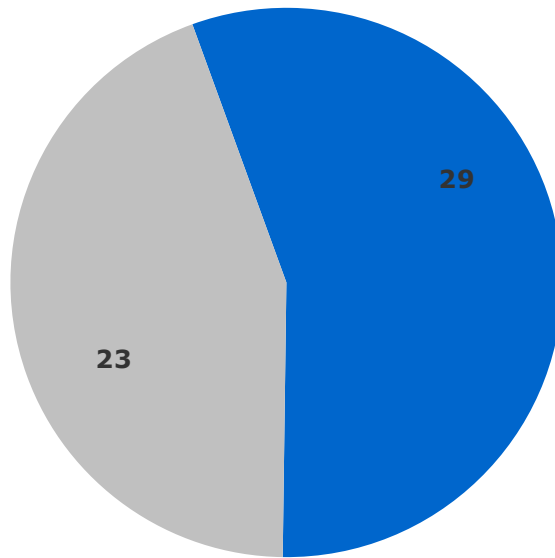
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Source: Arab Advisors Group, May 2011

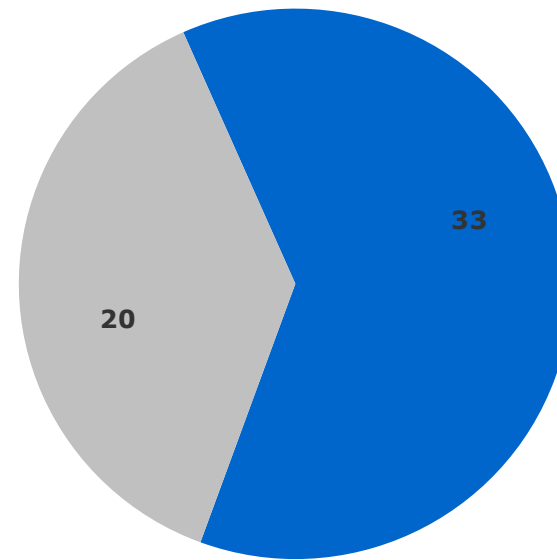
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# Four more operators deployed 3G networks in the Arab World since December 2009

December 2009



May 2011



■ Operators that offer 3G/3.5G services

■ Operators that do not offer 3G/3.5G services

*Source: Arab Advisors Group's 3G/3.5G Cellular Services in the Arab World and operators*

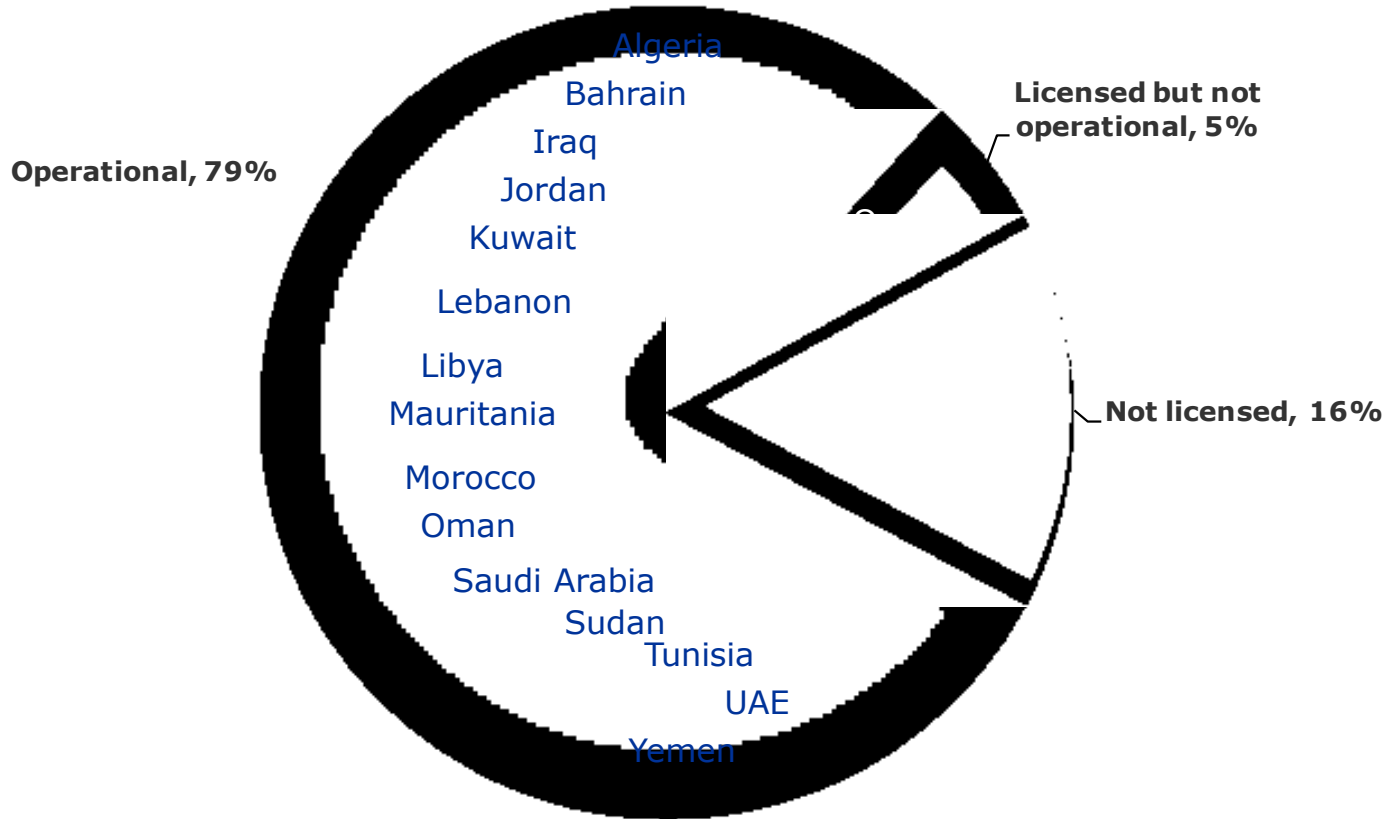


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# 15 Arab countries have commercially launched WiMAX networks by May 2011



Source: Arab Advisors Group, May 2011



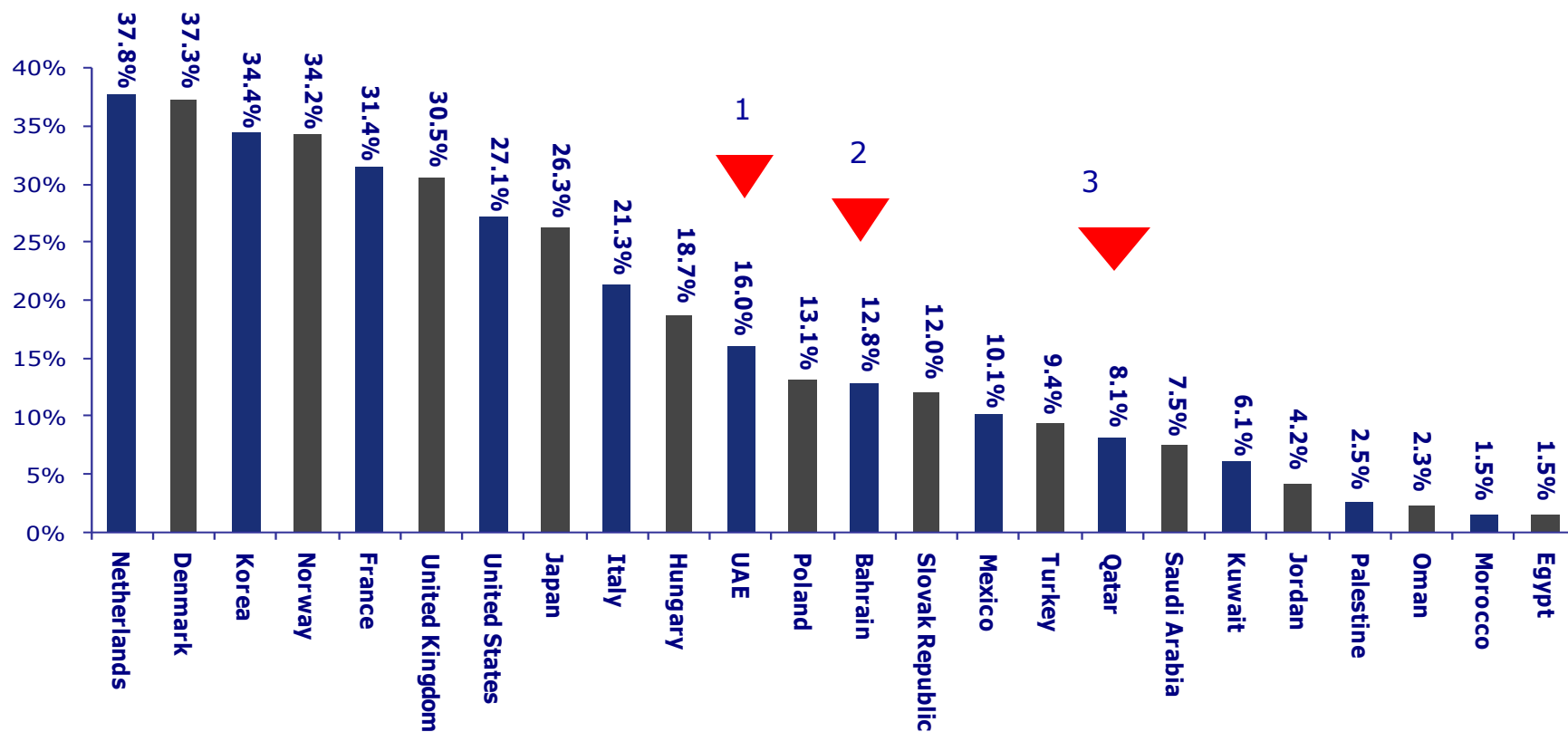
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# Fixed broadband Internet: UAE, Bahrain and Qatar lead the broadband adoption in the Arab World

Fixed Broadband lines % of total population



Note:

-The figures are for end of June 2010.

Source: Arab Advisors Group and OECD



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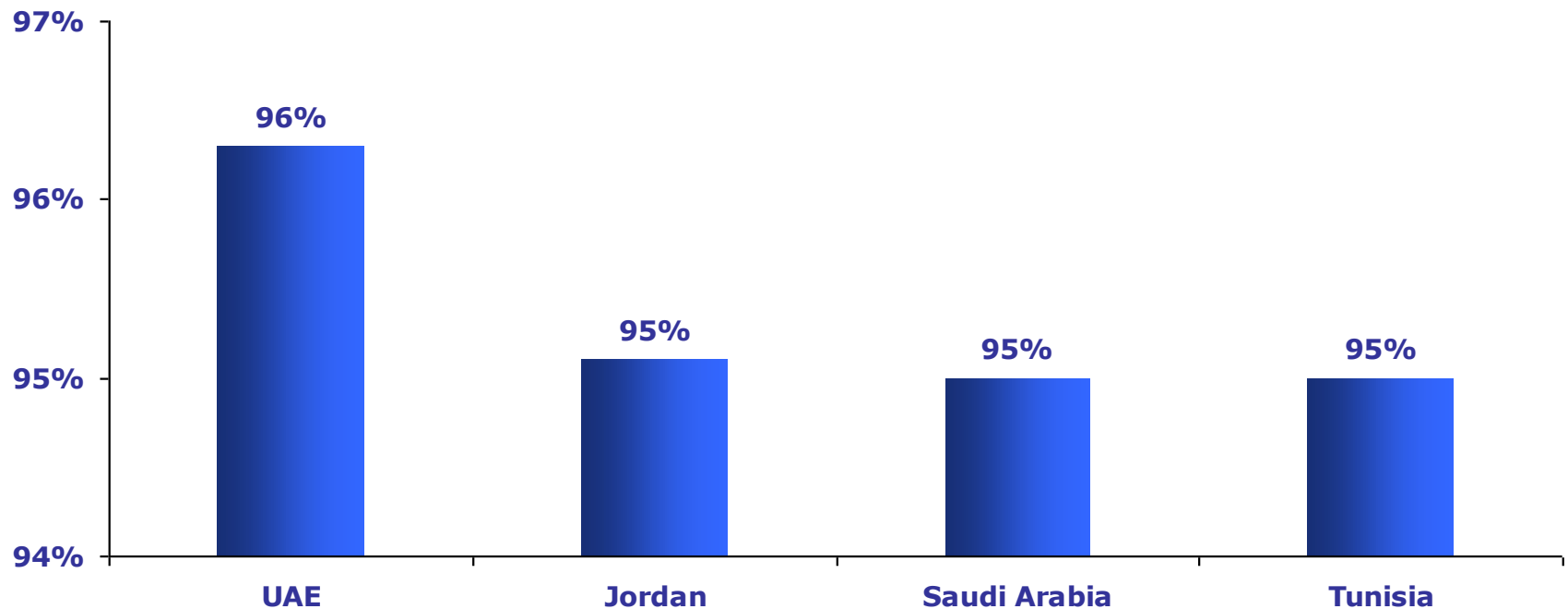
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# Expectedly, almost everybody in the Arab World watches TV..

## TV viewership



Note: Percentages were calculated from the total Internet users in the UAE, Jordan and Saudi Arabia and the total respondents in Tunisia

Source: Arab Advisors Group survey reports; UAE Media Survey of Internet Users 2009, Jordan Media Survey of Internet Users 2010, Saudi Arabia Media Survey of Internet Users 2011, Tunisia Media Survey 2010



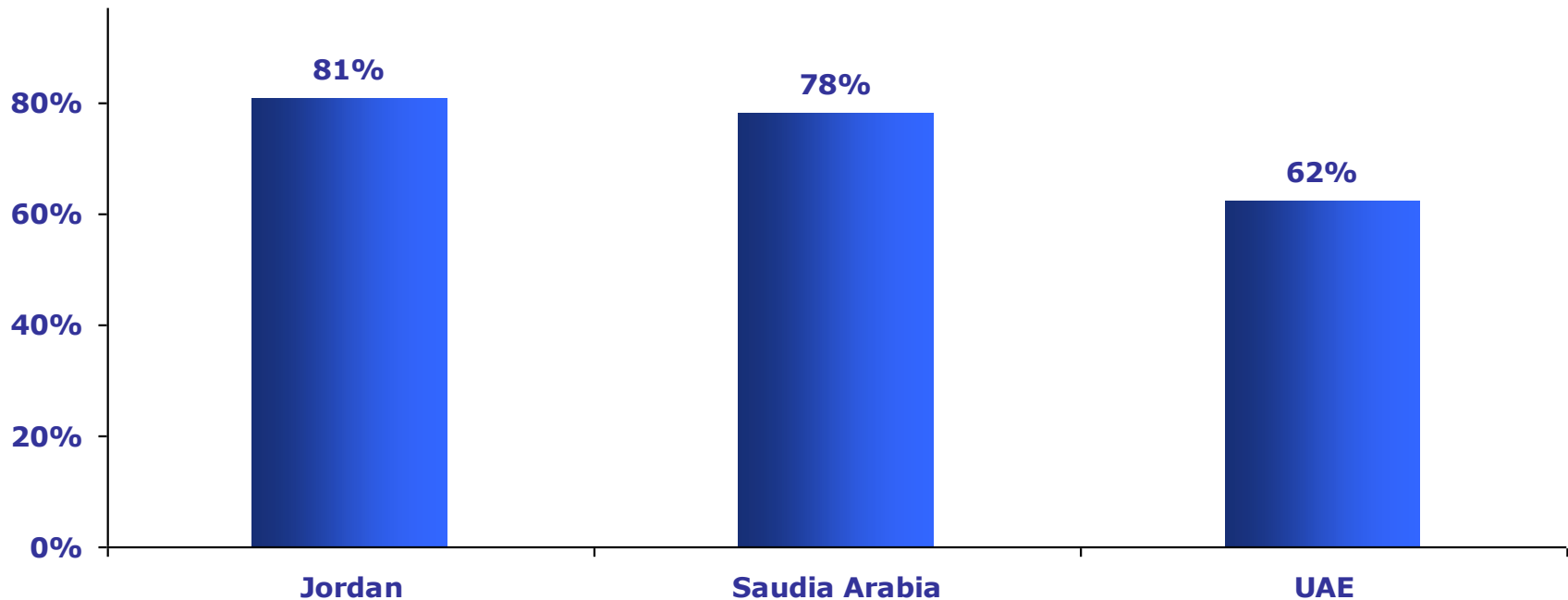
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# ... and a majority change their TV viewing habits during Ramadan

Changing TV viewing habits in Ramadan



Note: Percentages were calculated from the total Internet users who watch TV in the UAE, Jordan and Saudi Arabia

Source: Arab Advisors Group survey reports; UAE Media Survey of Internet Users 2009, Jordan Media Survey of Internet Users 2010, Saudi Arabia Media Survey of Internet Users 2011

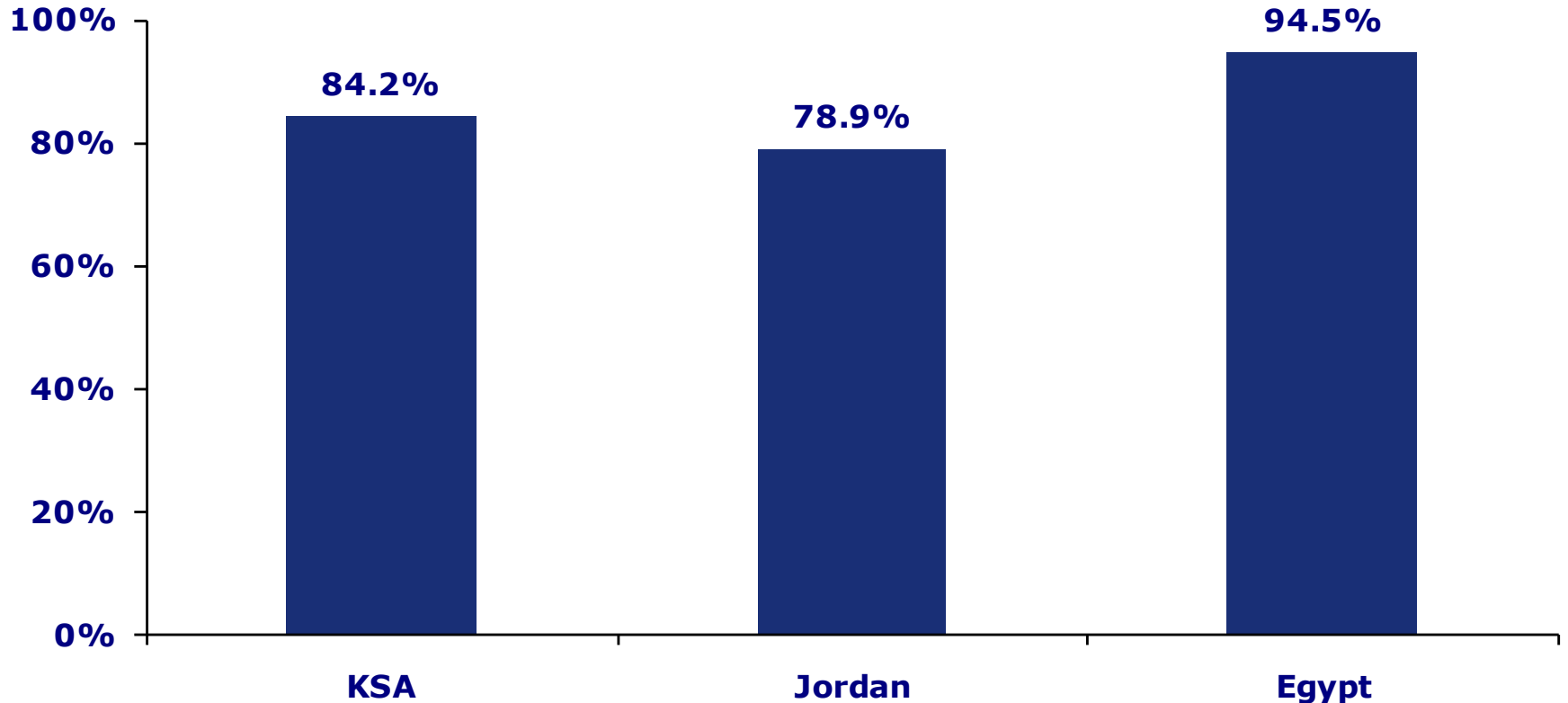


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# The majority of Internet users in Saudi Arabia, Egypt and Jordan reported having an ADSL connection at home



Note: Percentages are calculated from the total respondents who have Internet access at home  
Source: Arab Advisors Group's Saudi Arabia Internet users and ecommerce survey 2011, Jordan Internet users and ecommerce survey 2010, Arab Advisors Group's Egypt Internet users and ecommerce survey 2010

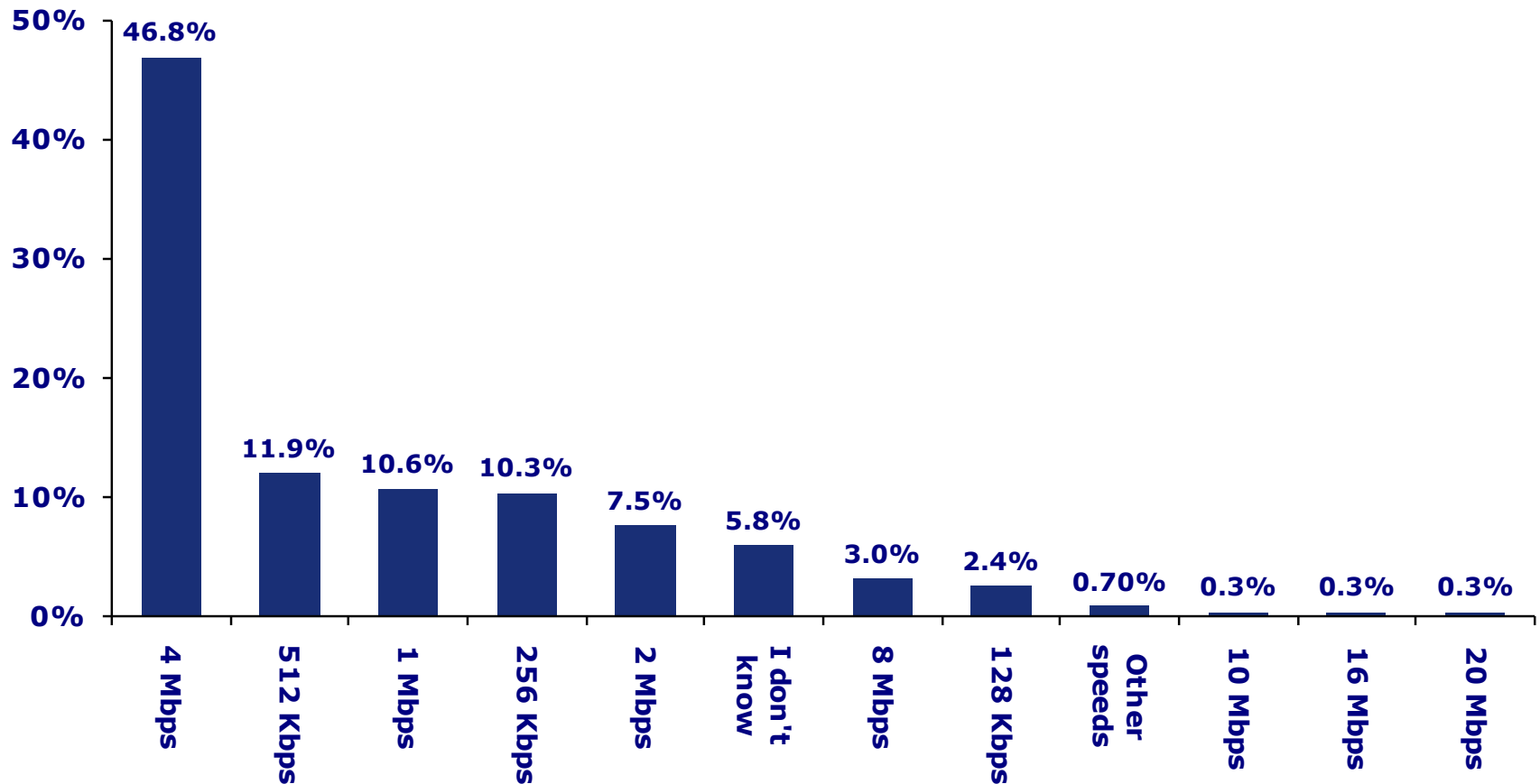


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# 46.8% of Internet users in Saudi Arabia with an ADSL connection at home, reported having an Internet speed of 4 Mbps



Note: Percentages are calculated from the total respondents who have an ADSL connection at home  
Source: Arab Advisors Group's Saudi Arabia Internet users and ecommerce survey 2011

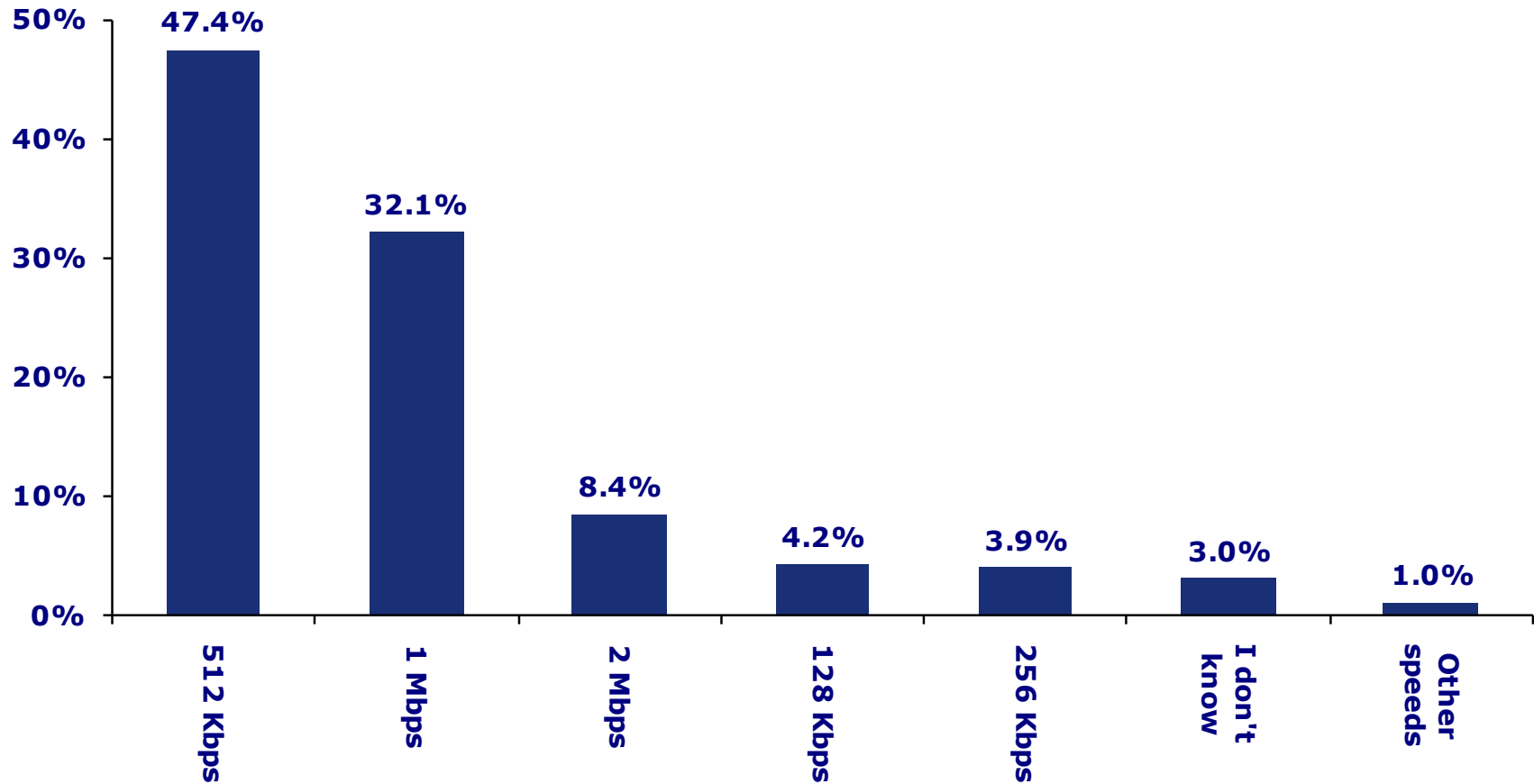


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# 40.5% of Internet users in Jordan with an ADSL connection at home reported having an Internet speed of 1 Mbps or above



Note: Percentages are calculated from the total respondents who have an ADSL connection at home.

Source: Arab Advisors Group's Jordan Internet users and ecommerce survey 2010

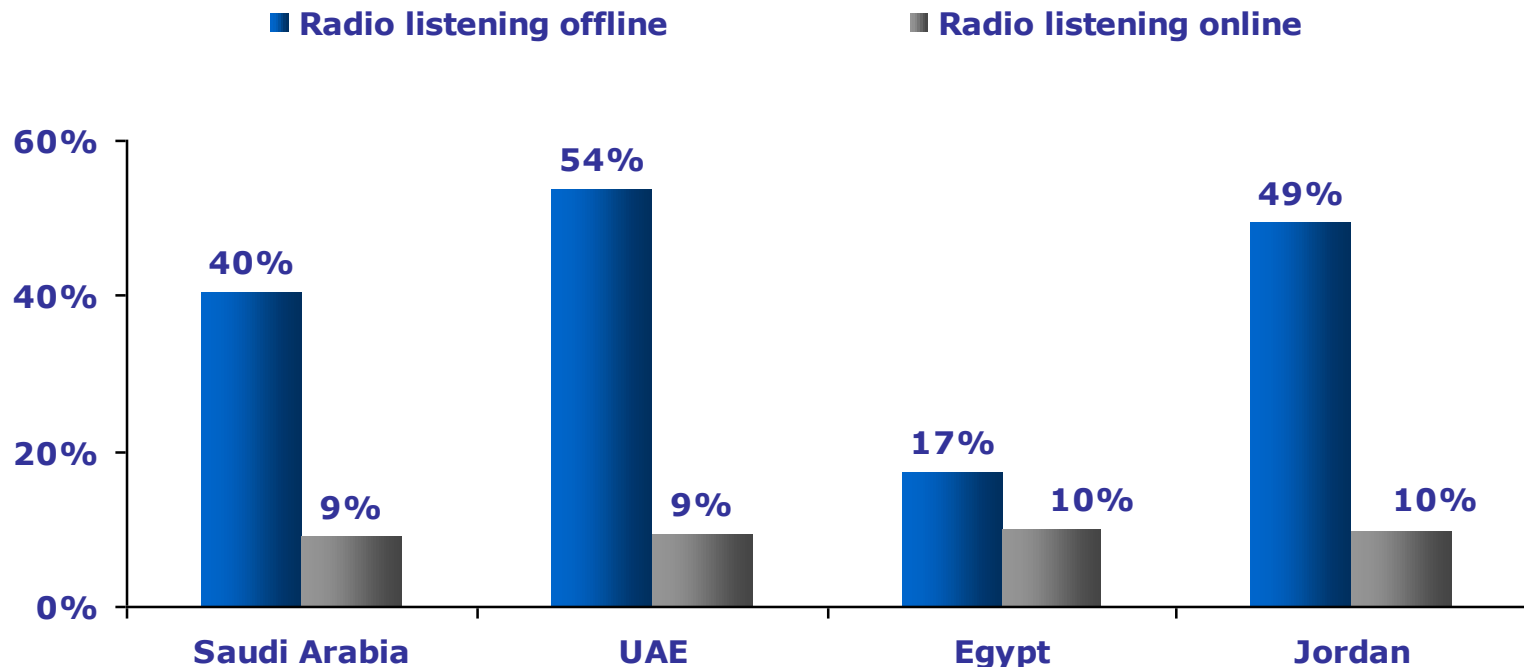


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# Tuning into radio stations online is not widespread



Note: Percentages are calculated from the total respondents

Source: Arab Advisors Group's Survey of Internet Use and Online Advertising Consumption and Effectiveness in Egypt, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Jordan, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Saudi Arabia and the UAE.

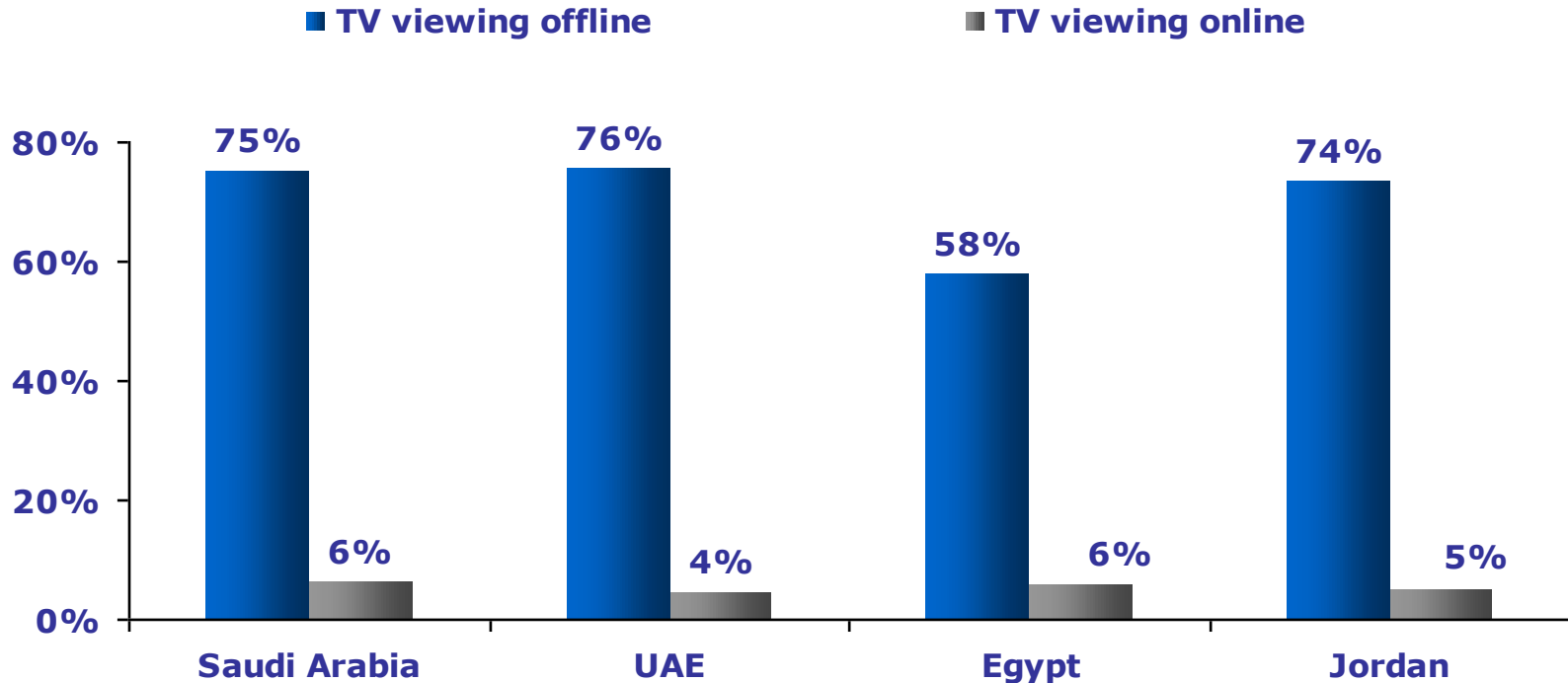


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# A minority of people watch TV online



Note: Percentages are calculated from the total sample sizes of 355 for Saudi Arabia, 300 for UAE, 555 for Jordan and 3,348 for Egypt.

Source: Arab Advisors Group's Survey of Internet Use and Online Advertising Consumption and Effectiveness in Egypt, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Jordan, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Saudi Arabia and the UAE.



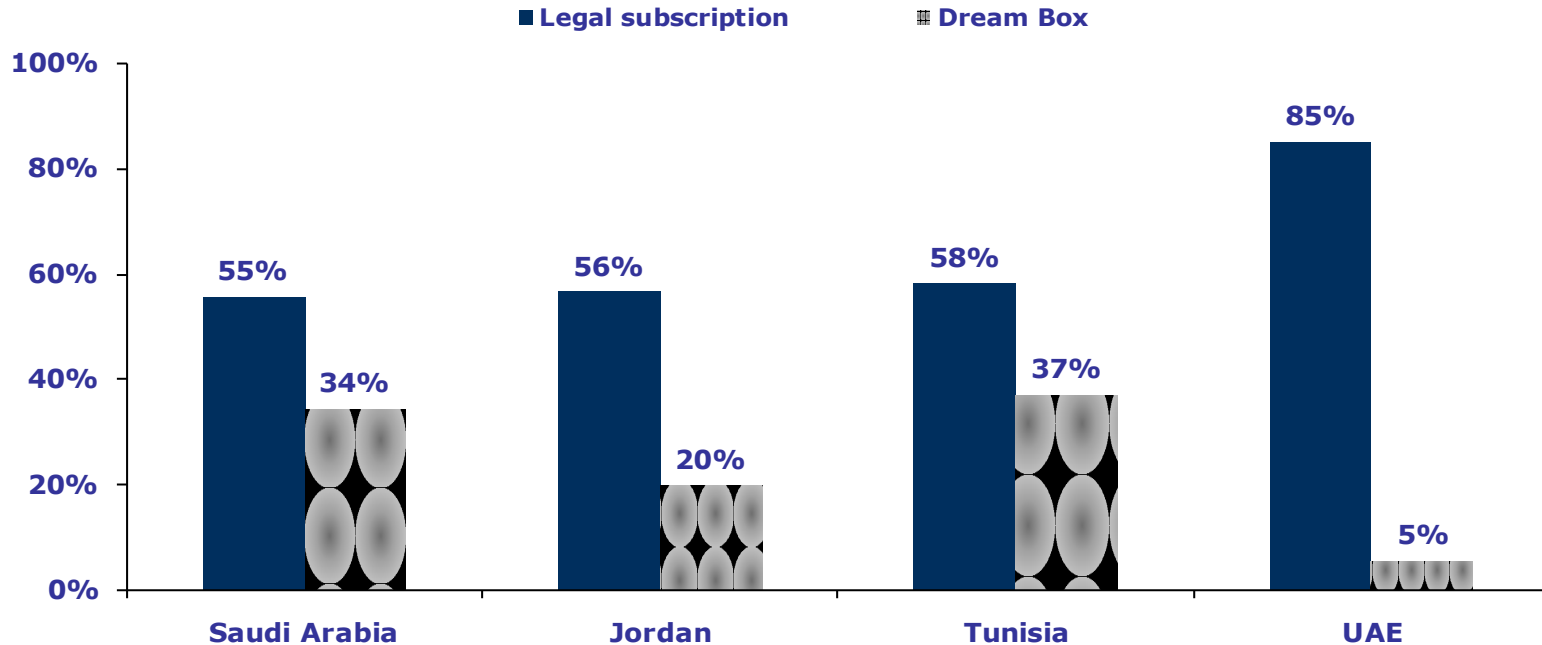
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# High levels of piracy rates: Self reported findings!

How respondents get Pay TV channels



Note: Percentages were calculated from the total Internet users who watch TV in the UAE, Jordan and Saudi Arabia and the total respondents who watch TV in Tunisia

Source: Arab Advisors Group survey reports; UAE Media Survey of Internet Users 2009, Jordan Media Survey of Internet Users 2010, Saudi Arabia Media Survey of Internet Users 2011, Tunisia Media Survey 2010

➔ However, OSN terminated the illegal use of Dream Box...



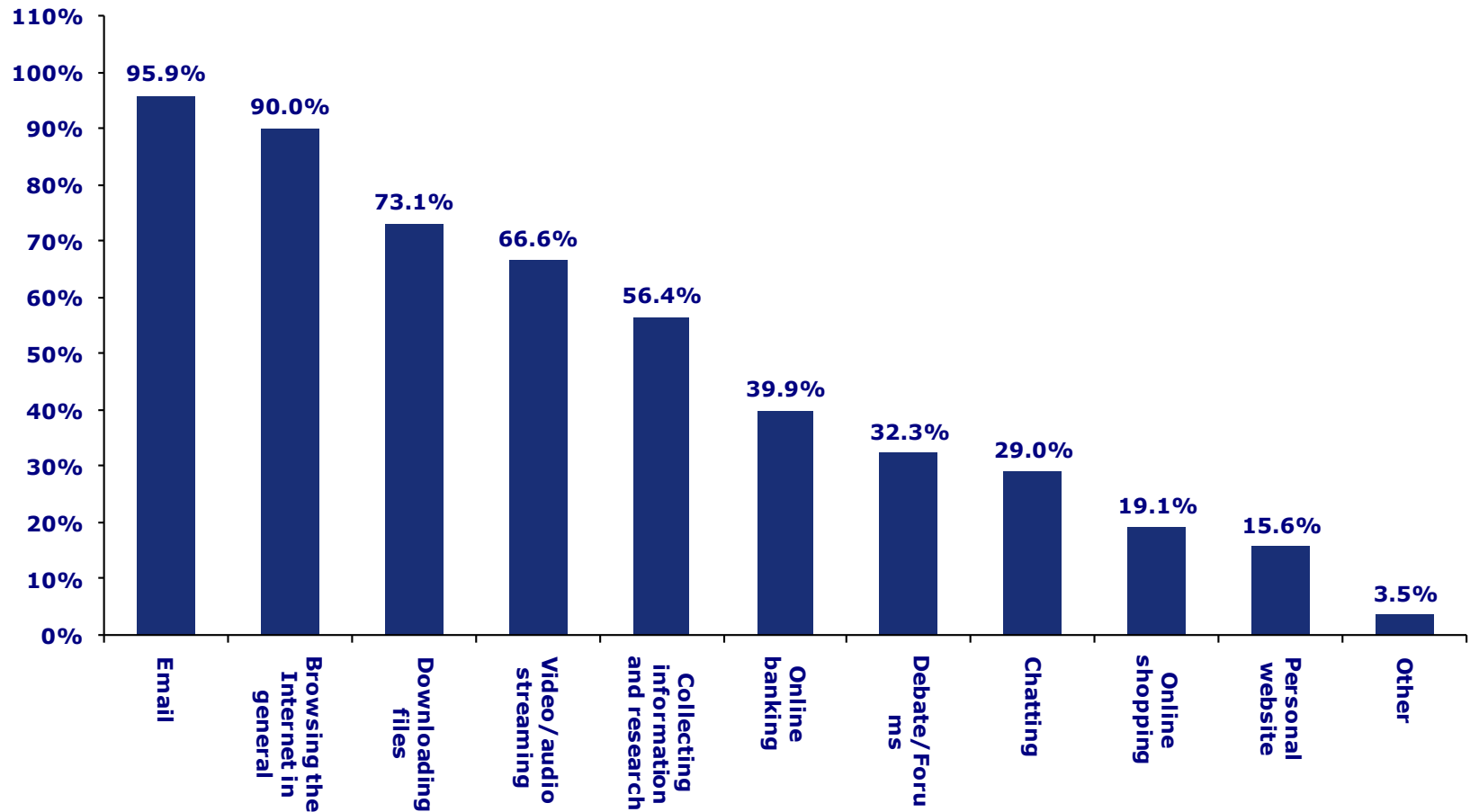
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# 40% of adult Internet users in KSA use the Internet for e-banking and 19% use it for shopping online



Note: Percentages are calculated from the total respondents

Source: Arab Advisors Group's Saudi Arabia Internet users and ecommerce survey 2011

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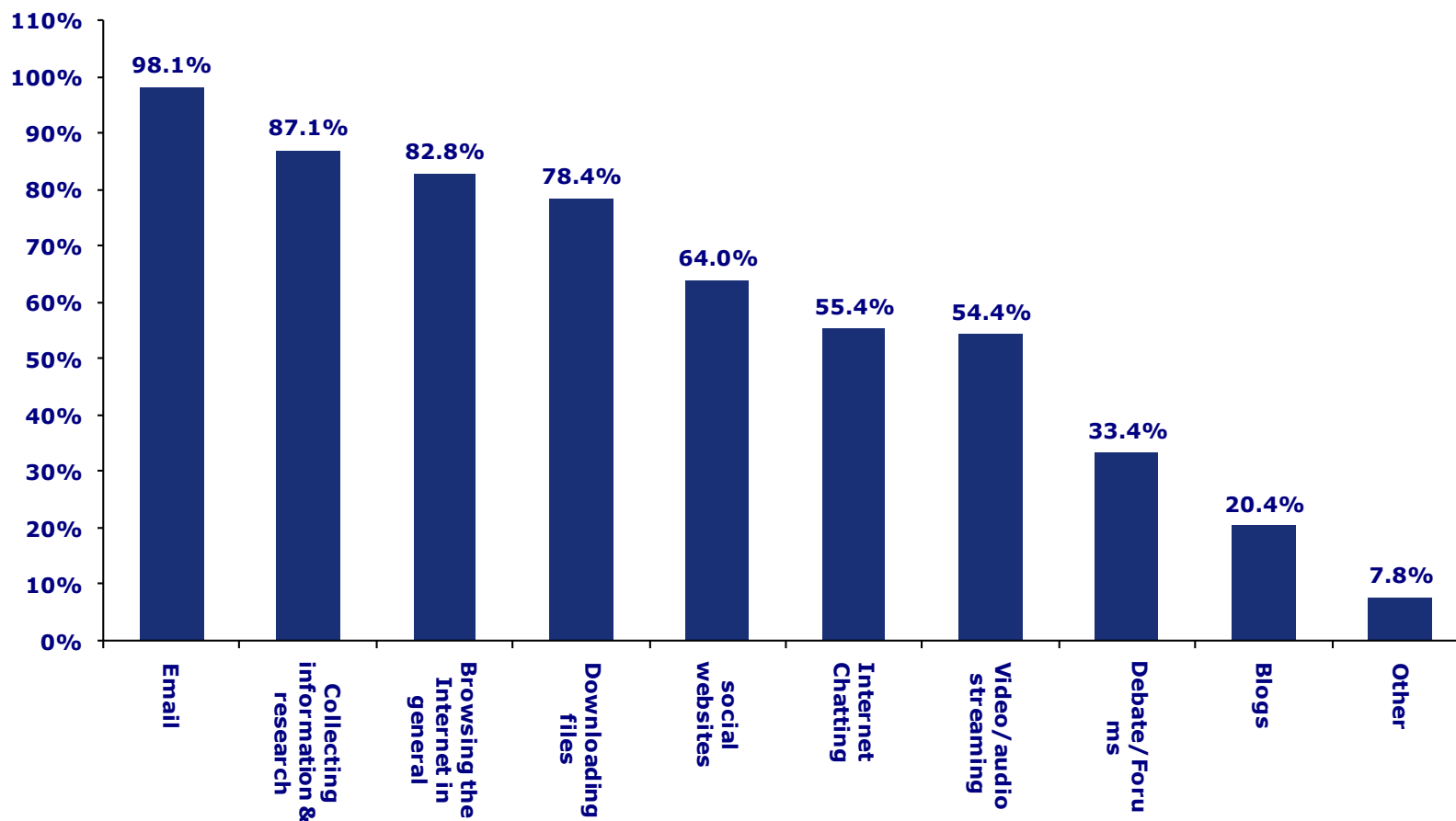
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# Almost all of Internet users in Egypt use the Internet for e-mails



Note: Percentages are calculated from the total respondents

Source: Arab Advisors Group's Egypt Internet users and ecommerce survey 2010



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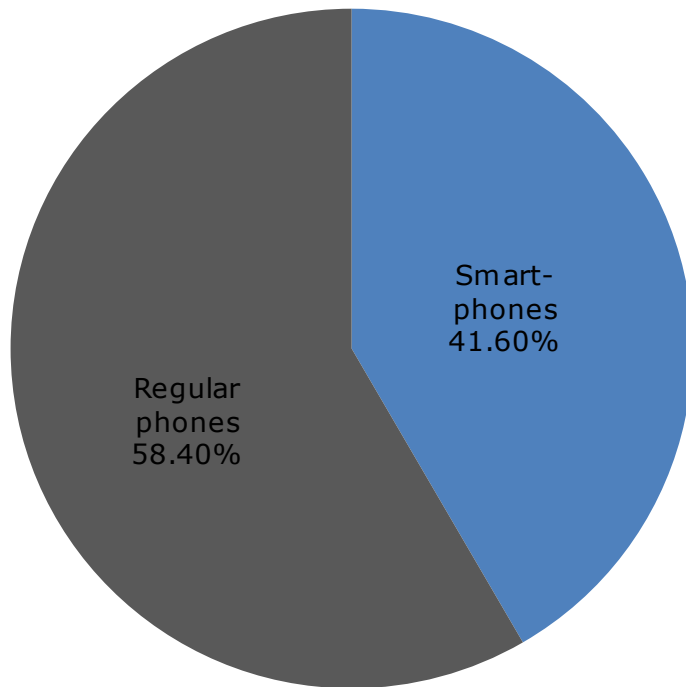
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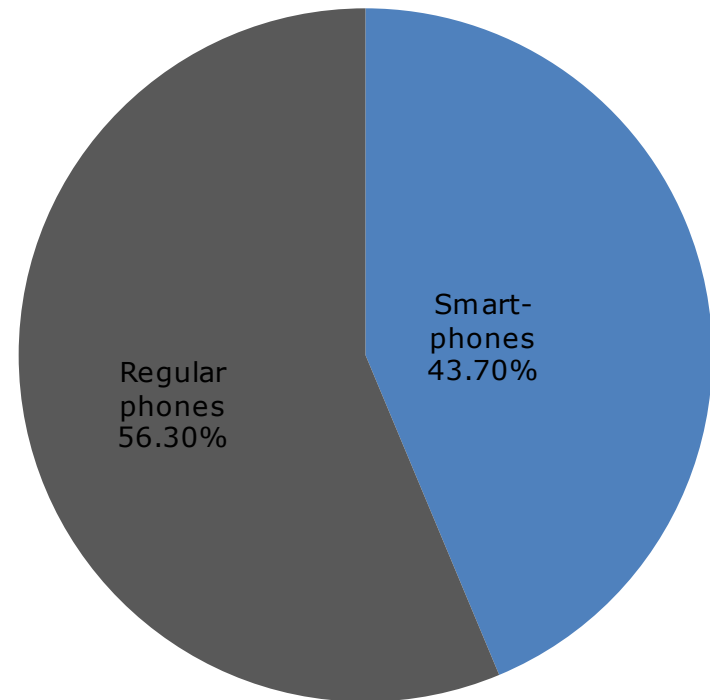
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# Smart-phones constituted 42% of total cellular handsets in Jordan and 44% in the UAE

Smartphones % in Jordan



Smartphones % in the UAE



Note: Percentages are calculated from the total cellular handsets

Source: Arab Advisors Group's Jordan Smartphone Survey 2011, UAE Smartphone Survey 2011



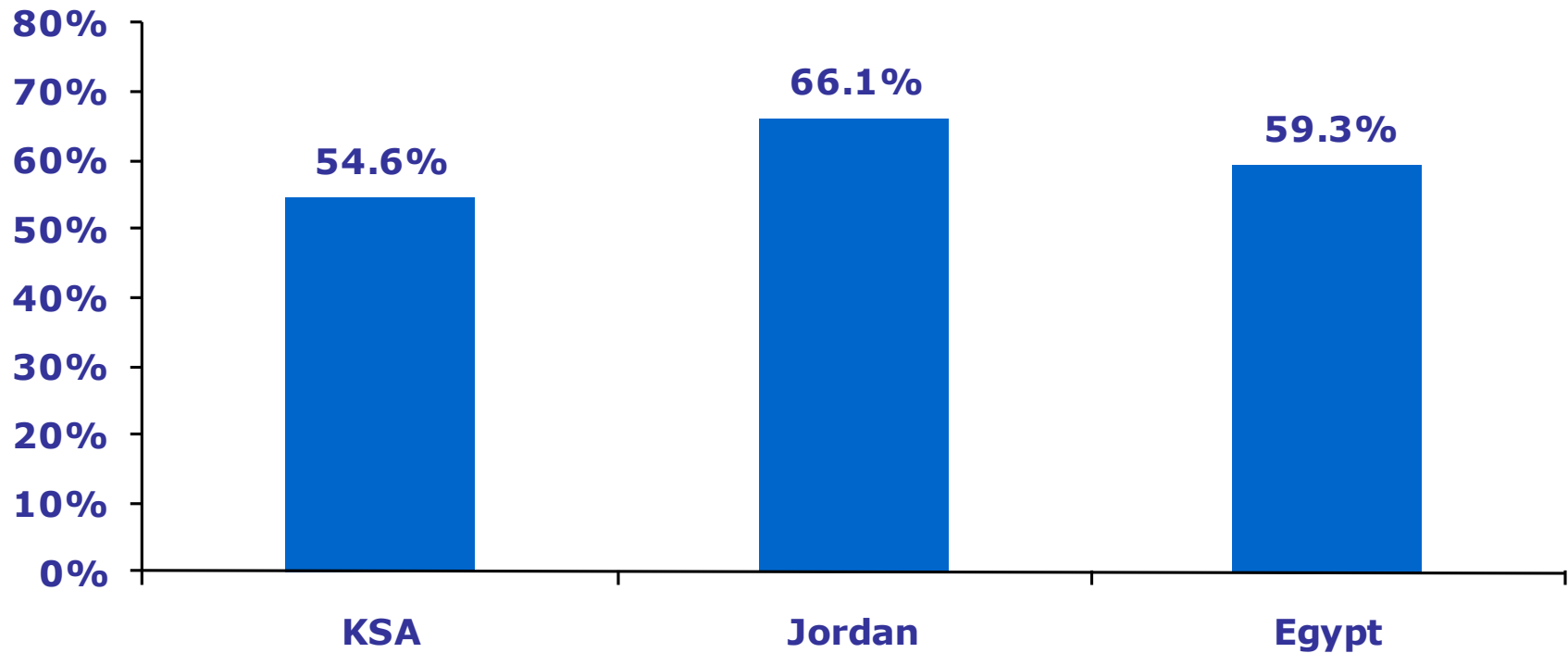
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# Social media use has become a primary channel for online social interaction

**% of Internet users who use social media to interact with others online**



Note: Percentages are calculated from the total sample size of KSA, Jordan and Egypt.

Source: Arab Advisors Group's Saudi Arabia Internet users and e-commerce Survey 2011, Jordan Internet users and e-commerce Survey 2010, Egypt Internet users and e-commerce Survey 2010

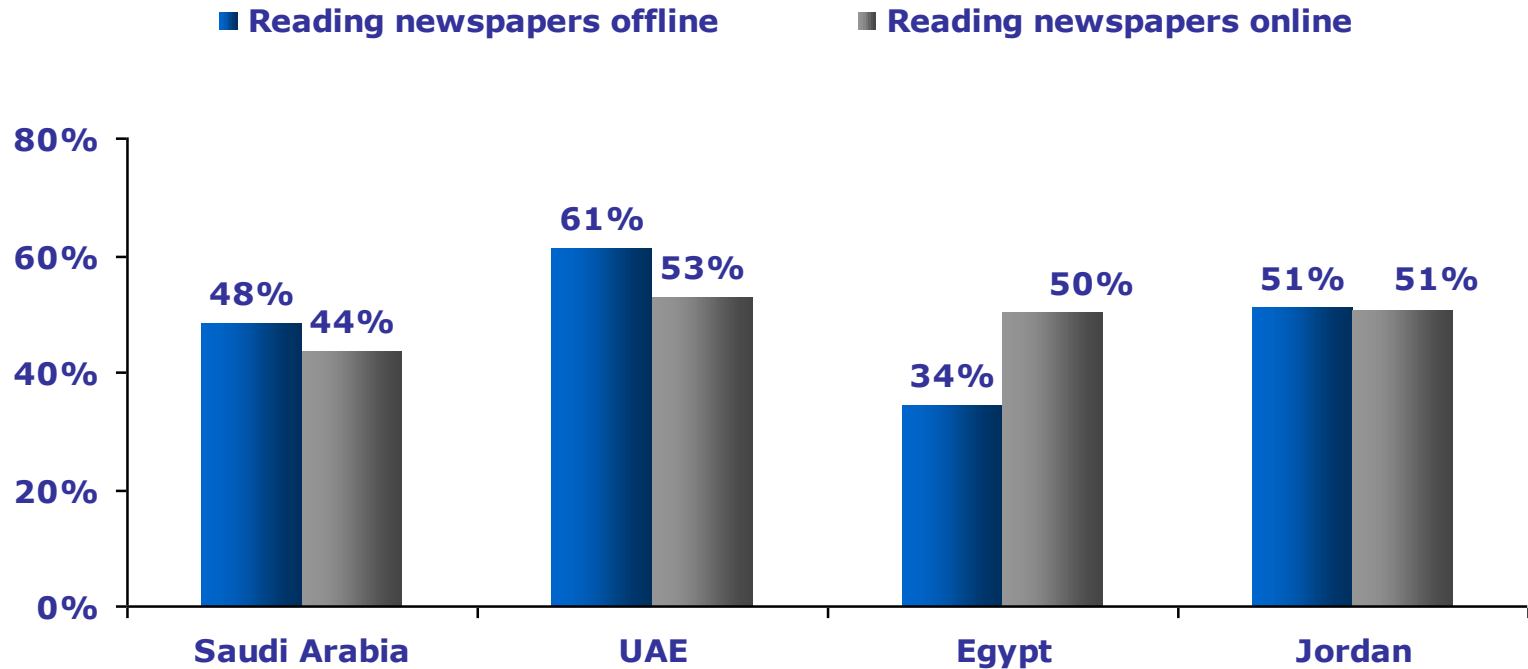


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# Reading newspapers online is more common than watching TV and listening to radio online



Note: Percentages are calculated from the total sample sizes of 355 for Saudi Arabia, 300 for UAE, 555 for Jordan and 3,348 for Egypt.

Source: Arab Advisors Group's Survey of Internet Use and Online Advertising Consumption and Effectiveness in Egypt, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Jordan, Survey of Internet Use and Online Advertising Consumption and Effectiveness in Saudi Arabia and the UAE.

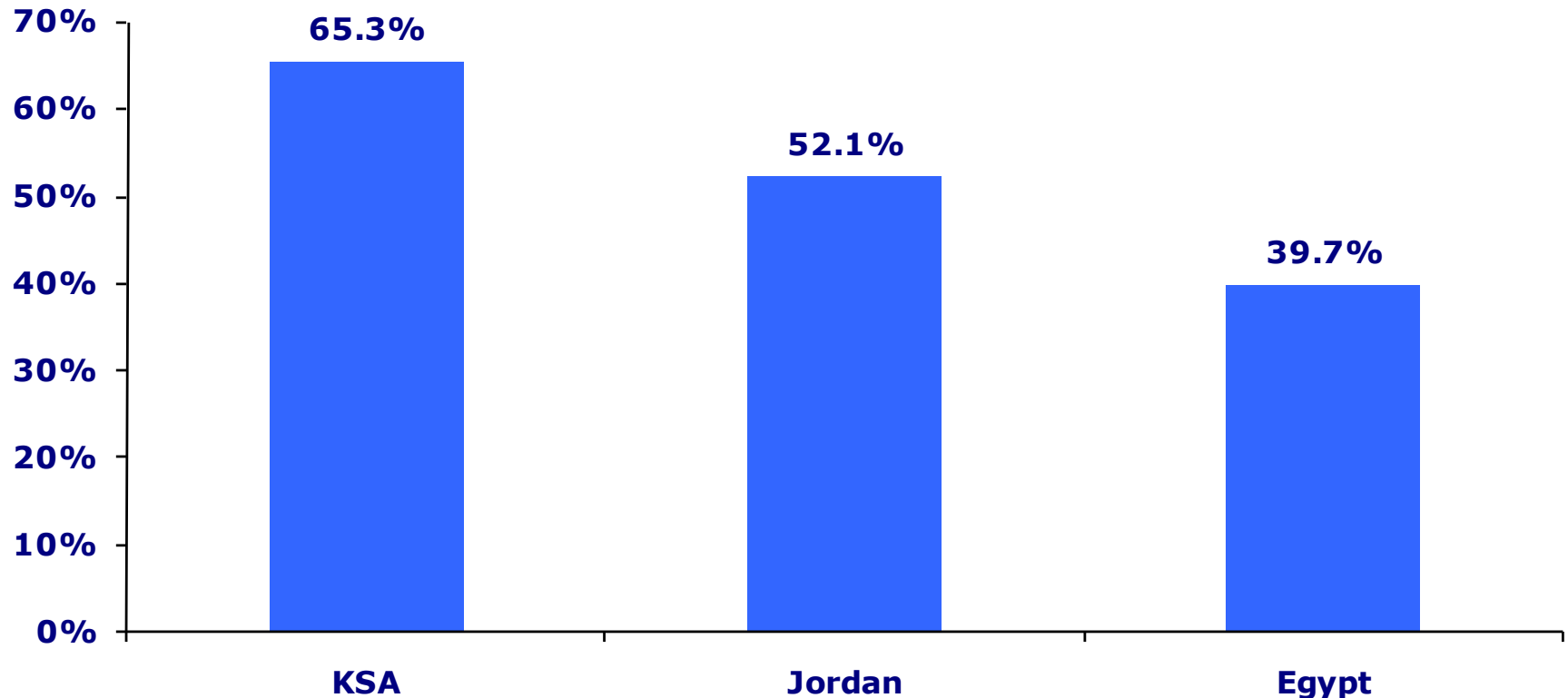


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# More than half of the Internet users in Saudi Arabia and Jordan play online games



Note: Percentages are calculated from the total respondents

Source: Arab Advisors Group's Saudi Arabia Internet users and ecommerce survey 2011, Jordan Internet users and ecommerce survey 2010, Arab Advisors Group's Egypt Internet users and ecommerce survey 2010

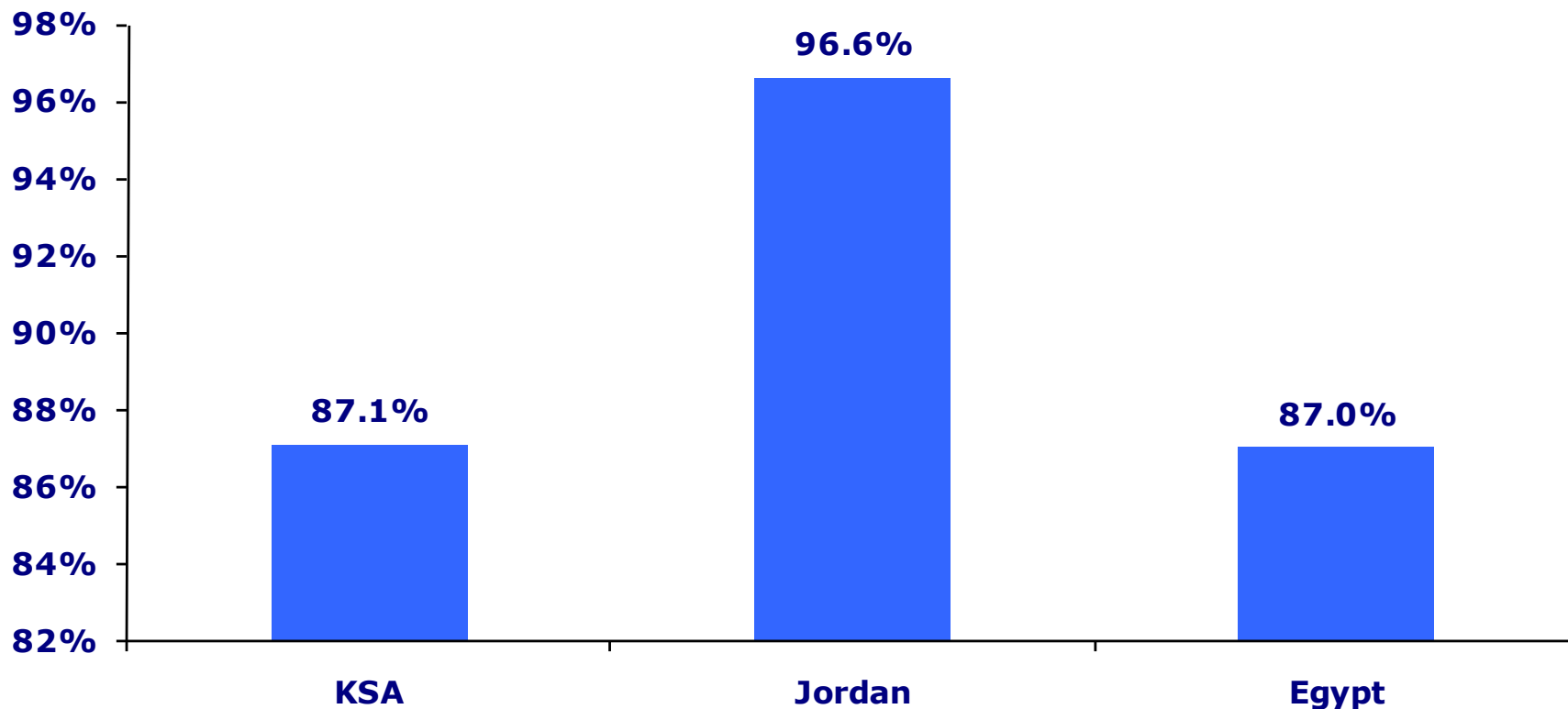


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# The majority who play online games in Saudi Arabia, Jordan and Egypt play free games



Note: Percentages are calculated from the total respondents who play online games

Source: Arab Advisors Group's Saudi Arabia Internet users and ecommerce survey 2011, Jordan Internet users and ecommerce survey 2010, Arab Advisors Group's Egypt Internet users and ecommerce survey 2010



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