

Middle East Online Advertising Market Outlook to 2017- Rapid Broadband Penetration to Foster the Growth

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Abstracts

The industry research publication titled 'Middle East Online Advertising Market Outlook to 2017- Rapid Broadband Penetration to Foster the Growth' presents a comprehensive analysis of market size by advertising spending on online advertising, display, search and social, digital video, Classifieds, mobile and email advertisements in Middle East, UAE, Saudi Arabia, Egypt, Qatar, Kuwait, Lebanon, Jordan, Bahrain, Morocco, Oman, Syria, Yemen and Palestine. The report entails the market share analysis and company profiles of major advertising agencies in the online advertising industry. The future analysis and macro-economic indicators such as internet users, average time spent online and M-commerce and E-commerce size have also been discussed in the publication.

Online advertising in Middle East has been the fastest growing segment in the advertising industry, representing highest potential in the region with a large young, socially engaged and informed population driving the spending on internet and mobile platforms. Middle East comprises of more than 50% of the population below the age of 25, representing an inherent strength for the online media industry as young population would be the early adopters of technology driving the growth of online advertising industry.

Verticals such as e-commerce, m-commerce and online gaming have witnessed increased activity in the region with a strong uptake of tablets and smart phones. Spending on online advertising industry in the region attained a mark of USD ~ million in 2012, representing a CAGR of 64.6% during 2007-2012. The growth has largely been driven by leading Middle Eastern countries such as UAE, Saudi Arabia, Egypt and Qatar, all of which have a large population base of youngsters who spend a significant

proportion of their time online and have the willingness and capacity to spend on electronic commerce.

Online advertisement spending in UAE was largely concentrated in industries such as banking and finance, real estate, automotive and telecom services in 2012. As the internet penetration in UAE is increasing substantially, these industries are shifting from physical space to online based models. UAE has one of the most active populations in terms of social networking and active blogging around the world. In 2012, online display advertisements had a contribution of ~% in online advertising spending in the UAE online advertising industry. Video advertising industry in UAE has grown significantly during 2007-2012, being one of the fastest growing segments in the country, representing a CAGR of more than 50% during 2007-2012. Flip Media, Prototype Interactive and Impact BBDO are some of the leading advertising agencies in the UAE.

The second and third largest countries in the online advertising space have been Saudi Arabia and Egypt, largely due to a huge young population base in the region. These countries contributed ~% and ~% in 2012 respectively which has augmented from 11.3% and 12.5% respectively in 2007. Qatar was the fourth largest online advertising market in Middle East with a share of 10.3% in 2012. The internet penetration in Qatar is one of the highest in the region. The most widely accepted form of advertising has been display advertising due to its resemblance to the traditional banner type advertisements. In most of the countries, online display advertising has contributed to nearly half of the online spending. Some of the leading industries of online advertising include telecom sector, real estate, banking and finance and automotive sector. The most well accepted platforms in the region include international platforms such as Google and Facebook.

The overall Middle East online advertising industry would witness a remarkable growth in the coming years. However, the online advertising industry would continue to constitute a small proportion of the overall media industry. Growing number of internet users, expanding information, communication and technological progress and increasing volume of traffic across various internet sites would drive the growth of Middle East internet advertising spending. The internet advertising spending in the region would grow at a CAGR of 34.1% during 2012-2017, to reach a market size of USD ~ million in 2017. Though the largest contributing country would continue to be UAE, its contribution would decline to 23.5% in 2017. On the other hand, contributions of Saudi Arabia, Egypt and Qatar would incline significantly to ~%, ~% and ~% respectively in 2017.

KEY TOPICS COVERED IN THE REPORT

The market size of the Middle East online advertising market in terms of advertising spend in the last years (2007 - 2012)

Middle East online advertising market segmentation by country (UAE, Saudi Arabia, Qatar, Egypt, Kuwait, Lebanon, Bahrain, Kuwait and others)

Trends and Developments in the online advertising market in Middle East

Competitive landscape players operating in online advertising market of UAE, Saudi Arabia, Egypt and Qatar in search, display and video advertising for both platforms such as Google, Facebook and leading advertising agencies such as Flip Media, 2Pure, BBDO, Universal Media, Agency 222 and others

Future projections and macro economic factors of Middle East online advertising.

Future Projections of online advertising market in UAE, Saudi Arabia, Qatar, Egypt, Kuwait, Lebanon, Bahrain, Kuwait and others during 2013-2017

Contents

1. MIDDLE EAST ONLINE ADVERTISING MARKET INTRODUCTION

2. MIDDLE EAST ONLINE ADVERTISING MARKET VALUE CHAIN

3. MIDDLE EAST ONLINE ADVERTISING MARKET SIZE BY VALUE, 2007-2012

4. MIDDLE EAST ONLINE ADVERTISEMENT MARKET SEGMENTATION BY COUNTRY, 2007-2012

5. UAE ONLINE ADVERTISING MARKET

5.1. UAE Online Advertising Market Introduction and Size, 2007-2012

5.2. UAE Online Advertising Market Revenue Models, 2012

5.3. UAE Online Advertising Market Segmentation by Type of Industry, 2012

5.4. UAE Online Advertising Market Segmentation by Type of Advertisement, 2007-2012

UAE Online Search and Social Advertisement Market, 2007-2012

UAE Online Display Advertisement Market, 2007-2012

UAE Online Lead Generation Advertisement Market, 2007-2012

UAE Online Sponsorship Advertisement Market, 2007-2012

UAE Video Advertisement Market, 2007-2012

UAE Online Classifieds Advertisement Market, 2007-2012

UAE Mobile Advertisement Market, 2007-2012

UAE E-Mail Advertisement Market, 2007-2012

5.5. Market Share of Major Players in UAE Online Advertising Market, 2012

5.5.1. Market Share of Major Players in UAE Online Search Advertising Market, 2012

5.5.2. Market Share of Major Players in UAE Online Display Advertising Market, 2012

5.5.3. Market Share of Major Players in Video Advertising Market, 2012

5.6. Competitive Landscape of Major Players in UAE Online Advertising Industry

5.7. UAE Online Advertisement Market Future Outlook and Projections, 2013-2017

5.8. Macro Economic Indicators of UAE Online Advertising Industry, 2007-2017

5.8.1. Gross Domestic Product of UAE, 2007-2017

5.8.2. Internet Users in UAE, 2007-2017

5.8.3. Mobile Subscribers in UAE, 2007-2017

5.8.4. E-Commerce Industry in UAE, 2007-2017

5.8.5. Average Online Time Spent in UAE, 2007-2017

5.8.6. M-Commerce Industry in UAE, 2007-2017

6. SAUDI ARABIA ONLINE ADVERTISING MARKET

6.1. Saudi Arabia Online Advertising Market introduction and Size, 2007-2012

6.2. Saudi Arabia Online Advertising Market Revenue Models, 2012

6.3. Saudi Arabia Online Advertising Market Segmentation by Type of Industry, 2012

6.4. Saudi Arabia Online Advertising Market Segmentation by Type of Advertisement, 2007-2012

Saudi Arabia Online Display and Video Advertisement Market, 2007-2012

Saudi Arabia Online Search Advertisement Market, 2007-2012

Saudi Arabia Mobile Advertisement Market, 2007-2012

Saudi Arabia Online Lead Generation Advertisement Market, 2007-2012

Saudi Arabia E-Mail Advertisement Market, 2007-2012

Saudi Arabia Others Advertisement Market, 2007-2012

6.5. Market Share of Major Players in Saudi Arabia Online Advertising Market, 2012

6.5.1. Market Share of Major Players in Saudi Arabia Online Search Advertising Market, 2012

6.5.2. Market Share of Major Players in Saudi Arabia Online Display Advertising Market, 2012

6.5.3. Market Share of Major Players in Saudi Arabia Video Advertising Market, 2012

6.5.4. Market Share of Major Advertising Agencies in Saudi Arabia Online Advertising Market, 2012

6.6. Competitive Landscape of Major Players in Saudi Arabia Online Advertising Industry

6.7. Saudi Arabia Online Advertisement Market Future Outlook and Projections, 2013-2017

6.8. Macro Economic Indicators of Saudi Arabia Online Advertising Industry, 2007-2017

6.8.1. Gross Domestic Product in Saudi Arabia, 2007-2017

6.8.2. Internet Users in Saudi Arabia, 2007-2017

6.8.3. Mobile Subscribers in Saudi Arabia, 2007-2017

6.8.4. E-Commerce Industry in Saudi Arabia, 2007-2017

6.8.5. Average Online Time Spent in Saudi Arabia, 2007-2017

6.8.6. M-Commerce Industry in Saudi Arabia, 2007-2017

7. EGYPT ONLINE ADVERTISING MARKET

7.1. Egypt Online Advertising Market Size and Introduction, 2007-2012

7.2. Egypt Online Advertising Market Revenue Models, 2012

7.3. Egypt Online Advertising Market Segmentation by Type of Industry, 2007-2012

7.4. Egypt Online Advertising Market Segmentation by Type of Advertisement, 2007-2012

- Egypt Online Display Advertisement Market, 2007-2012
- Egypt Online Search Advertisement Market, 2007-2012
- Egypt Online Lead Generation Advertisement Market, 2007-2012
- Egypt Online Sponsorship Advertisement, 2007-2012
- Egypt Video Advertisement Market, 2007-2012
- Egypt Mobile Advertisement Market, 2007-2012
- Egypt E-Mail Advertisement Market, 2007-2012
- Egypt Online Classifieds Advertisement Market, 2007-2012

7.5. Market Share of Major Players in Egypt Online Advertising Market, 2012

7.6. Competitive Landscape of Major Players in Egypt Online Advertising Industry

7.7. Egypt Online Advertisement Market Future Outlook and Projections, 2013-2017

7.8. Macro Economic Indicators of Egypt Online Advertising Industry, 2007-2017

- 7.8.1. Gross Domestic Product of Egypt, 2007-2017
- 7.8.2. Internet Users in Egypt, 2007-2017
- 7.8.3. Mobile Subscribers in Egypt, 2007-2017
- 7.8.4. E-Commerce Industry in Egypt, 2007-2017
- 7.8.5. Average Online Time Spent in Egypt, 2007-2017
- 7.8.6. M-Commerce Industry in Egypt, 2007-2017

8. QATAR ONLINE ADVERTISING MARKET

8.1. Qatar Online Advertising Market Size and Introduction, 2007-2012

8.2. Qatar Online Advertising Market Revenue Models, 2012

8.3. Qatar Online Advertising Market Segmentation by Type of Industry, 2012

8.4. Qatar Online Advertising Market Segmentation by Type of Advertisement, 2007-2012

- Qatar Online Display Advertisement Market, 2007-2012
- Qatar Online Search Advertisement Market, 2007-2012
- Qatar Mobile Advertisement Market, 2007-2012
- Qatar Video Advertisement Market, 2007-2012
- Qatar Online Sponsorship Advertisement Market, 2007-2012
- Qatar Online Lead Generation Advertisement Market, 2007-2012
- Qatar Other Online Advertisement Market, 2007-2012

8.5. Market Share of Major Players in Qatar Online Advertising Market, 2012

- 8.5.1. Market Share of Major Players in Qatar Online Search Advertising Market, 2012
- 8.5.2. Market Share of Major Players in Qatar Online Display Advertising Market, 2012
- 8.5.3. Market Share of Major Players in Qatar Video Advertising Market, 2012

- 8.6. Competitive Landscape of Major Players in Qatar Online Advertising Industry
- 8.7. Qatar Online Advertisement Market Future Outlook and Projections, 2013-2017
- 8.8. Macro Economic Indicators of Qatar Online Advertising Industry, 2007-2017
 - 8.8.1. Gross Domestic Product of Qatar, 2007-2017
 - 8.8.2. Internet Users in Qatar, 2007-2017
 - 8.8.3. Mobile Subscribers in Qatar, 2007-2017
 - 8.8.4. E-Commerce Industry in Qatar, 2007-2017
 - 8.8.5. Average Online Time Spent in Qatar, 2007-2017
 - 8.8.6. M-Commerce Market in Qatar, 2007-2017

9. KUWAIT ONLINE ADVERTISING INDUSTRY

- 9.1. Kuwait Online Advertising Industry Market Size and Introduction, 2007-2012
- 9.2. Kuwait Online Advertising Industry Segmentation by Type of Advertisement, 2007-2012
- 9.3. Kuwait Online Advertising Industry Future Outlook and Projections, 2013-2017
- 9.4. Market Share of Major Players in Kuwait Online Advertising Industry, 2012

10. LEBANON ONLINE ADVERTISING INDUSTRY

- 10.1. Lebanon Online Advertising Industry Market Size and Introduction, 2007-2012
- 10.2. Lebanon Online Advertising Industry Segmentation by Type of Advertisement, 2007-2012
- 10.3. Lebanon Online Advertising Industry Future Outlook and Projections, 2013-2017
- 10.4. Market Share of Major Players in Lebanon Online Advertising Industry, 2012
 - 10.4.1. Market Share of Major Players in Lebanon Online Search Advertising Industry, 2012
 - 10.4.2. Market Share of Major Players in Lebanon Online Display Advertising Market, 2012
 - 10.4.3. Market Share of Major Players in Lebanon Video Advertising Market, 2012

11. JORDAN ONLINE ADVERTISING INDUSTRY

- 11.1. Jordan Online Advertising Industry Market Size and Introduction, 2007-2012
- 11.2. Jordan Online Advertising Industry Segmentation by Type of Advertisement, 2007-2012
- 11.3. Jordan Online Advertising Industry Future Outlook and Projections, 2013-2017

12. BAHRAIN ONLINE ADVERTISING INDUSTRY

12.1. Bahrain Online Advertising Industry Market Size and Introduction, 2007-2012

12.2. Bahrain Online Advertising Industry Segmentation by Type of Advertisement, 2007-2012

12.3. Bahrain Online Advertising Industry Future Outlook and Projections, 2013-2017

13. MOROCCO, OMAN, SYRIA, YEMEN AND PALESTINE ONLINE ADVERTISING MARKET SIZE AND FUTURE PROJECTIONS, 2007-2017

14. MIDDLE EAST ONLINE ADVERTISING MARKET TRENDS AND DEVELOPMENT

Social Media Revolutionizing the Online Advertising

On the go Digital Consumption driven by Rising Penetration of Smartphones

Emergence and Success of Pan regional Online Portals

Regional Brands Employing Digital Space to Achieve Initial Success with Social Media Campaigns

Emergence of Online Group Buying Sites

High Usage of Online Newspapers

15. MIDDLE EAST ONLINE ADVERTISING INDUSTRY FUTURE OUTLOOK AND PROJECTIONS, 2013-2017

15.1. Cause and Effect Relationship Between Dependent and independent Factors Prevailing in Middle East Online Advertising Market

15.2. Middle East Online Advertising Future Outlook and Projections, 2013-2017

16. APPENDIX

16.1. Market Definitions

16.2. Abbreviations

16.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent and Independent)

Multi Factor Based Sensitivity Model

Final Conclusion

16.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: Middle East Online Advertising Market Value Chain

Figure 2: Middle East Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 3: UAE Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 4: Market Share of Major Players in UAE Online Search Advertising on the Basis of Spending in Percentage, 2012

Figure 5: Market Share of Major Players in UAE Online Display Advertising on the Basis of Spending in Percentage, 2012

Figure 6: Market Share of Major Players in UAE Video Advertising on the Basis of Spending in Percentage, 2012

Figure 7: UAE Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 8: Gross Domestic Product in UAE in USD Million, 2007-2017

Figure 9: Internet Users in UAE in Million, 2007-2017

Figure 10: Mobile Subscribers in UAE in Million, 2007-2017

Figure 11: E-Commerce Industry Size by Transaction Value in UAE in USD Million, 2007-2017

Figure 12: Average Time Spent Online per Day in UAE in Hours, 2007-2017

Figure 13: M-Commerce Industry Size by Transaction Value in UAE in USD Million, 2007-2017

Figure 14: Saudi Arabia Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 15: Market Share of Major Players in Saudi Arabia Online Search Advertising on the Basis of Spending in Percentage, 2012

Figure 16: Market Share of Major Players in Saudi Arabia Online Display Advertising on the Basis of Spending in Percentage, 2012

Figure 17: Market Share of Major Players in Saudi Arabia Video Advertising on the Basis of Spending in Percentage, 2012

Figure 18: Market Share of Major Advertising Agency in Saudi Arabia Online Advertising on the Basis of Revenue in Percentage, 2012

Figure 19: Saudi Arabia Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 20: Gross Domestic Product of Saudi Arabia in USD Million, 2007-2017

Figure 21: Internet Users in Saudi Arabia in Million, 2007-2017

Figure 22: Mobile Subscribers in Saudi Arabia in Million, 2007-2017

Figure 23: E-Commerce Industry Size by Transaction Value in Saudi Arabia in USD Million, 2007-2017

Figure 24: Average Online Spent in Saudi Arabia per Day in Hours, 2007-2017

Figure 25: M-Commerce Industry Size by Transaction Value in Saudi Arabia in USD Million, 2007-2017

Figure 26: Egypt Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 27: Market Share of Major Players in Egypt Online Display Advertising (Google, Facebook, Yahoo, Twitter) on the Basis of Spending in Percentage, 2012

Figure 28: Egypt Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 29: GDP of Egypt in USD Million, 2007-2017

Figure 30: Internet Users in Egypt in Million, 2007-2017

Figure 31: Mobile Subscribers in Egypt in Million, 2007-2017

Figure 32: E-Commerce Industry Size by Transaction Value in Egypt in USD Million, 2007-2017

Figure 33: Average Online Time Spent in Egypt per Day in Hours, 2007-2017

Figure 34: M-Commerce Industry Size by Transaction Value in Egypt in USD Million, 2007-2017

Figure 35: Qatar Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 36: Market Share of Major Players in Qatar Online Search Advertising on the Basis of Spending in Percentage, 2012

Figure 37: Market Share of Major Players in Qatar Online Display Advertising on the Basis of Spending in Percentage, 2012

Figure 38: Market Share of Major Players in Saudi Arabia Video Advertising on the Basis of Spending in Percentage, 2012

Figure 39: Qatar Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 40: Gross Domestic Product of Qatar in USD Million, 2007-2017

Figure 41: Internet Users in Qatar in Million, 2007-2017

Figure 42: Mobile Subscribers in Qatar in Million, 2007-2017

Figure 43: E-Commerce Industry Size by Transaction Value in Qatar USD Million, 2007-2017

Figure 44: Average Online Time Spent in Qatar per Day in Hours, 2007-2017

Figure 45: M-Commerce Industry Size by Transaction Value in Qatar in USD Million, 2007-2017

Figure 46: Kuwait Online Advertising Market Size on the Basis of Spending in USD

Million, 2007-2012

Figure 47: Kuwait Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 48: Market Share of Major Players in Kuwait Online Display Advertising on the Basis of Spending in Percentage, 2012

Figure 49: Lebanon Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 50: Lebanon Online Advertising Market Segmentation by Type of Industry on the Basis of Spending in Percentage, 2012

Figure 51: Lebanon Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 52: Market Share of Major Players in Lebanon Online Search Advertising on the Basis of Spending in Percentage, 2012

Figure 53: Market Share of Major Players in Lebanon Online Display Advertising Market on the Basis of Spending in Percentage, 2012

Figure 54: Market Share of Major Players in Lebanon Video Advertising on the Basis of Spending in Percentage, 2012

Figure 55: Jordan Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 56: Jordan Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 57: Bahrain Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Figure 58: Bahrain Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Figure 59: Middle East Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

List Of Tables

LIST OF TABLES

Table 1: Middle East Online Advertising Market Segmentation on the Basis of Spending in Different Countries in Percentage, 2007-2012

Table 2: Cost of Revenue Models in UAE Online Advertising Industry in USD, 2012

Table 3: UAE Online Advertising Market Spending by Type of Industry in USD Million and Contribution in Percentage, 2012

Table 4: UAE Online Advertising Market Unique Campaigns by Type of Industry, 2012 and 2013

Table 5: UAE Online Advertising Market Segmentation on the basis of Spending on Different Types of Advertisement in Percentage, 2007-2012

Table 6: UAE Online Advertising Market Spending by Types of Online Advertisements in USD Million, 2007-2012

Table 7: Competitive Landscape of Major Advertising Agencies (Flip Media, Prototype Interactive and Impact BBDO) in the UAE Online Advertising Industry

Table 8: Revenues of Leading Digital Advertising Agencies in UAE in USD Million in 2012

Table 9: UAE Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 10: UAE Broadband Subscriptions in Million, 2009-2012

Table 11: Primary Reasons for People Spending Time Online in Percentage, 2012

Table 12: Cost of Revenue Models in Saudi Arabia Online Advertising Industry in USD, 2012

Table 13: Saudi Arabia Online Advertising Market Spending by Type of Industry in USD Million and Contribution on the Basis of Spending in Percentage, 2012

Table 14: Saudi Arabia Online Advertising Market Segmentation by Type of Advertisement on the Basis of Spending in Percentage, 2007-2012

Table 15: Saudi Arabia Online Advertising Market Spending by Types of Online Advertisements in USD Million, 2007-2012

Table 16: Competitive Landscape of Major Advertising Agencies (Starcom Media Vest, Mindshare, Initiative Group and Universal Media) in the Saudi Arabia Online Advertising Industry

Table 17: Saudi Arabia Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 18: Cost of Revenue Models in Egypt Online Advertising Industry in USD, 2012

Table 19: Egypt Online Advertising Market Spending by Type of Industry in USD Million and Contribution on the Basis of Spending in Percentage, 2012

Table 20: Egypt Online Advertising Market Segmentation by Type of Advertisement on the Basis of Spending in Percentage, 2007-2012

Table 21: Egypt Online Advertising Market Spending by Types of Online Advertisements in USD Million, 2007-2012

Table 22: Competitive Landscape of Major Advertising Agencies (Starcom Media Vest Group, OMD, Universal Media, Initiative Group, Digital Republic, Techno Wireless) in the Egypt Online Advertising Industry

Table 23: Egypt Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 24: Cost of Revenue Models in Qatar Online Advertising Industry in USD, 2012

Table 25: Qatar Arabia Online Advertising Market Spending by Type of Industry in USD Million and Contribution on the Basis of Spending in Percentage, 2012

Table 26: Qatar Online Advertising Market Segmentation by Type of Advertisement on the Basis of Spending in Percentage, 2007-2012

Table 27: Qatar Online Advertising Market Spending by Type of Advertisements in USD Million, 2007-2012

Table 28: Competitive Landscape of Major Advertising Agencies (Agency 222, Universal Media and Frame Communications) in the Qatar Online Advertising Industry

Table 29: Qatar Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 30: Primary Reasons for People Spending Time Online in Qatar in Percentage, 2012

Table 31: Cost of Revenue Models in Kuwait Online Advertising Industry in USD, 2012

Table 32: Kuwait Online Advertising Market Segmentation on the basis of Spending on Different Types of Advertisement in Percentage, 2007-2012

Table 33: Kuwait Online Advertising Market Segmentation on the basis of Spending on Different Types of Advertisement in USD Million, 2007-2012

Table 34: Kuwait Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 35: Lebanon Mobile Subscribers, Fixed Broadband Subscribers and Internet Users in Thousand, 2012

Table 36: Leading Facebook Brand Followers in Lebanon Online Advertising Industry in Thousand, 2012

Table 37: Lebanon Online Advertising Market Size by Type of Advertisement on the Basis on Spending in Percentage, 2007-2012

Table 38: Lebanon Online Advertising Market Size by Type of Advertisement on the Basis on Spending in USD Million, 2007-2012

Table 39: Lebanon Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 40: Jordan Online Advertising Market Size by Type of Advertisement on the Basis on Spending in Percentage, 2007-2012

Table 41: Jordan Online Advertising Market Size by Type of Advertisement on the Basis on Spending in Percentage, 2007-2012

Table 42: Jordan Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 43: Bahrain Online Advertising Market Size by Type of Advertisement on the Basis on Spending in Percentage, 2007-2012

Table 44: Bahrain Online Advertising Market Size by Type of Advertisement on the Basis on Spending in USD Million, 2007-2012

Table 45: Bahrain Online Advertising Market Future Projections by Type of Advertisement on the Basis on Spending in USD Million, 2013-2017

Table 46: Morocco, Oman, Syria, Yemen and Palestine Online Advertising Market Size on the Basis of Spending in USD Million, 2007-2012

Table 47: Morocco, Oman, Syria, Yemen and Palestine Online Advertising Market Future Projections on the Basis of Spending in USD Million, 2013-2017

Table 48: Mobile Penetration Rate in Percentage, 2007-2013

Table 49: Broadband Penetration Rate of Households in Percentage, 2007-2013

Table 50: Cause and Effect Relationship between Dependent and Independent Factors Prevailing in Middle East Online Advertising Market

Table 51: Middle East Online Advertising Market Segmentation by Country on the Basis of Spending in Percentage, 2013-2017

Table 52: Correlation Matrix for Egypt Online Advertising Market

Table 53: Regression Coefficients Output

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