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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.

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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

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