



DIGITAL IN 2018 IN WESTERN ASIA

ESSENTIAL INSIGHTS INTO INTERNET, SOCIAL MEDIA, MOBILE, AND ECOMMERCE USE ACROSS THE REGION







SAUDI ARABIA



DIGITAL IN SAUDI ARABIA

A SNAPSHOT OF THE COUNTRY'S KEY DIGITAL STATISTICAL INDICATORS



TOTAL **POPULATION**



INTERNET USERS



ACTIVE SOCIAL MEDIA USERS



UNIQUE **MOBILE USERS**



ACTIVE MOBILE SOCIAL USERS



MILLION

MILLION

MILLION

23.66 **MILLION**

MILLION

URBANISATION: 84%

91%

PENETRATION:

PENETRATION:

75%

PENETRATION:

71%

PENETRATION:







ANNUAL DIGITAL GROWTH

YEAR-ON-YEAR CHANGE IN KEY STATISTICAL INDICATORS



INTERNET **USERS**



ACTIVE SOCIAL MEDIA USERS

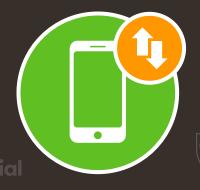


+32%

SINCE JAN 2017

+6 MILLION

UNIQUE **MOBILE USERS**

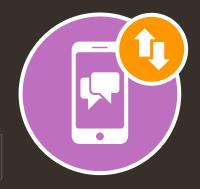


+10%

SINCE JAN 2017

+2 MILLION

ACTIVE MOBILE SOCIAL USERS



+13%

SINCE JAN 2017

+2 MILLION

+8 MILLION

+34%

SINCE JAN 2017





POPULATION & ECONOMIC INDICATORS

ESSENTIAL DEMOGRAPHICS AND KEY ECONOMIC INDICATORS



TOTAL POPULATION



FEMALE POPULATION



MALE **POPULATION**



ANNUAL CHANGE IN **POPULATION SIZE**







33.25 **MILLION**

42.8%

GDP PER

CAPITA

57.2%

+1.9%

27.9

POPULATION LIVING IN URBAN AREAS



84%

\$54,522

LITERACY (TOTAL)



95%

FEMALE LITERACY



91%

YEARS OLD MALE

LITERACY



DEVICE USAGE

PERCENTAGE OF THE ADULT POPULATION* THAT CURRENTLY USES EACH KIND OF DEVICE [SURVEY-BASED]







98%

SMART PHONE



96%

LAPTOP OR DESKTOP COMPUTER



56%



22%

TABLET

COMPUTER

TELEVISION (ANY KIND)



83%

DEVICE FOR STREAMING INTERNET CONTENT TO TV







1%







TIME SPENT WITH MEDIA

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY



AVERAGE DAILY TIME SPENT USING THE INTERNET VIA ANY DEVICE





AVERAGE DAILY TIME SPENT USING SOCIAL MEDIA VIA ANY DEVICE



2H 34M 3H 05M 1H 01M

AVERAGE DAILY TV VIEWING TIME (BROADCAST, STREAMING AND VIDEO ON DEMAND)



AVERAGE DAILY TIME SPENT LISTENING TO STREAMING MUSIC





ATTITUDES TOWARDS DIGITAL

HOW INTERNET USERS* PERCEIVE THE ROLE OF TECHNOLOGY, AND THEIR PERSPECTIVE ON PRIVACY ISSUES,



BELIEVE THAT NEW
TECHNOLOGIES OFFER MORE
OPPORTUNITIES THAN RISKS

PREFER TO COMPLETE TASKS DIGITALLY WHENEVER POSSIBLE BELIEVE DATA PRIVACY AND PROTECTION ARE VERY IMPORTANT DELETE COOKIES FROM INTERNET BROWSER TO PROTECT PRIVACY

USE AN AD-BLOCKING TOOL TO STOP ADVERTS BEING DISPLAYED











65%

63%

78%

34%



INTERNET USE

BASED ON REPORTED INTERNET USER DATA, AND USER-CLAIMED MOBILE INTERNET USE



TOTAL NUMBER OF ACTIVE **INTERNET USERS**



30.25 **MILLION**

INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION



91%

TOTAL NUMBER OF ACTIVE MOBILE INTERNET USERS



MILLION

MOBILE INTERNET USERS AS A PERCENTAGE OF THE TOTAL POPULATION











INTERNET USERS: DIFFERENT PERSPECTIVES

學經期初

REPORTS OF THE TOTAL NUMBER OF INTERNET USERS FROM DIFFERENT DATA PROVIDERS

INTERNET WORLD STATS

ITU (INTERNATIONAL TELECOMMUNICATION UNION)

INTERNET LIVE STATS **CIA WORLD FACTBOOK**









24.15 **MILLION**

24.52 **MILLION**

20.81 **MILLION**

24.54 **MILLION**

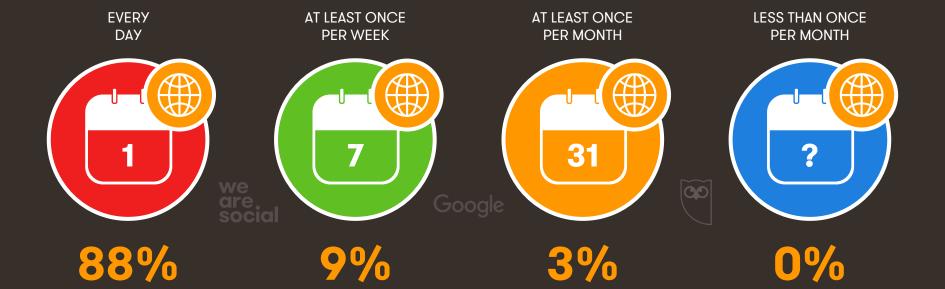




FREQUENCY OF INTERNET USE

HOW OFTEN INTERNET USERS ACCESS THE INTERNET FOR PERSONAL REASONS (ANY DEVICE)









INTERNET CONNECTIONS: SPEED & DEVICES

AVERAGE INTERNET CONNECTION SPEEDS, AND THE DEVICE THAT PEOPLE USE MOST OFTEN TO ACCESS THE INTERNET



AVERAGE INTERNET
SPEED VIA FIXED
CONNECTIONS

AVERAGE INTERNET SPEED VIA MOBILE CONNECTIONS

ACCESS THE INTERNET MOST OFTEN VIA A COMPUTER OR TABLET ACCESS EQUALLY VIA A SMARTPHONE AND COMPUTER OR TABLET ACCESS THE INTERNET MOST OFTEN VIA A SMARTPHONE











21.26 MBPS

16.22 MBPS

4%

40%







SHARE OF WEB TRAFFIC BY DEVICE

BASED ON EACH DEVICE'S SHARE OF ALL WEB PAGES SERVED TO WEB BROWSERS



LAPTOPS & DESKTOPS



MOBILE PHONES



TABLET DEVICES



OTHER DEVICES



33%

year-on-year change:
-20%

64%

YEAR-ON-YEAR CHANGE:

+16%

2%

YEAR-ON-YEAR CHANGE:

-31%

0.42%

YEAR-ON-YEAR CHANGE:

+110%







SIMILARWEB'S RANKING OF TOP WEBSITES

3200

RANKINGS BASED ON AVERAGE MONTHLY TRAFFIC TO EACH WEBSITE IN O4 2017

# WEBSITE	CATEGORY	MONTHLY TRAFFIC	TIME PER VISIT	PAGES PER VISIT
01 GOOGLE.COM.SA	SEARCH	86,300,000	10M 50S	8.6
02 YOUTUBE.COM	TV & VIDEO	79,400,000	25M 41S	12.1
03 GOOGLE.COM	SEARCH	50,700,000	11M 06S	11.5
04 FACEBOOK.COM	SOCIAL	26,700,000	16M 13S	12.6
05 TWITTER.COM	SOCIAL	16,400,000	15M 37S	10.4
06 LIVE.COM	EMAIL	10,700,000	8M 41S	8.9
07 YAHOO.COM	NEWS & MEDIA	7,600,000	7M 44S	5.9
08 WIKIPEDIA.ORG		we 7,400,000	4M 14S	3.1
09 WHATSAPP.COM	SOCIAL	7,000,000	2M 41S	2.0
10 AMAZON.COM	SHOPPING	6,600,000	10M 18S	12.8







ALEXA'S RANKING OF TOP WEBSITES



RANKINGS BASED ON THE NUMBER OF VISITORS TO EACH SITE, AND THE NUMBER OF PAGES VIEWED ON EACH SITE PER VISIT

# WEBSITE	TIME	PAGES
01 GOOGLE.COM.SA	5M 49S	8.19
02 YOUTUBE.COM	8M 18S	4.79
03 GOOGLE.COM	7M 32S	8.56
04 SABQ.ORG	4M 07S	2.33
05 FACEBOOK.COM	10M 21S	4.00
06 YAHOO.COM	4M 02S	3.61
07 ARGAAM.COM	12M 11S	4.05
08 LIVE.COM	4M 03S	3.41
09 TWITTER.COM	6M 21S	3.21
10 AJEL.SA	4M 08S	2.48

#	WEBSITE		TIME	PAGES
11	HAWAAWORLD.COM		1M 46S	1.08
12	SOUQ.COM		6M 25S	4.60
13	STARZPLAY.COM		1M 26S	1.21
14	WIKIPEDIA.ORG		4M 16S	3.31
15	MOE.GOV.SA		12M 31S	6.48
16	DELOTON.COM		1M 02S	1.52
17	MOI.GOV.SA	we are.	8M 10S	10.10
18	BLOGSPOT.COM		2M 38S	2.12
19	ALMUBASHER.COM.SA		8M 50S	6.63
20	POPADS.NET		OM 46S	1.89





WEEKLY ONLINE ACTIVITIES BY DEVICE

PERCENTAGE OF THE TOTAL POPULATION* ENGAGING IN EACH ACTIVITY AT LEAST ONCE PER WEEK [SURVEY-BASED]



USE A SEARCH ENGINE



VISIT A SOCIAL NETWORK



PLAY **GAMES**



WATCH **VIDEOS**



LOOK FOR PRODUCT INFORMATION



SMARTPHONE:

66%

COMPUTER:

40%

SMARTPHONE:

85%

COMPUTER:

47%

SMARTPHONE:

29%

COMPUTER:

19%

SMARTPHONE:

78%

COMPUTER:

46%

SMARTPHONE:

40%

COMPUTER:



TOP GOOGLE SEARCH QUERIES IN 2017

RANKING OF THE TOP SEARCH TERMS ENTERED INTO GOOGLE'S SEARCH ENGINE THROUGHOUT 2017

# QUE	RY	INDEX
01	يو تيو ب	100
02	سبق سبق	98
03	we معنی are social توینر	87
04	صور	68
05	الرياض	59
06	مترجم	55
07	حراج	54
08 YOU	TUBE	47
09	قصة عشق	46
10	قو قل	43

# QUERY		INDEX
11	نور	42
12	ترجمة	41
13 FACEBOOK		41
14 GOOGLE		40
15	الراجحي	25
16	فيس	25
17	اليونيوب	25
18	الطقس	24
19 TRANSLATE		23
20	يلا شوت	22





FREQUENCY OF WATCHING ONLINE VIDEO

HOW OFTEN INTERNET USERS WATCH ONLINE VIDEOS (ANY DEVICE)



WATCH ONLINE VIDEOS EVERY WEEK

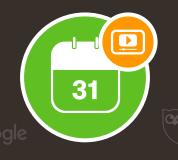
WATCH ONLINE VIDEOS EVERY MONTH

WATCH ONLINE VIDEOS LESS THAN ONCE A MONTH

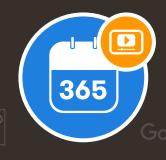
NEVER WATCH ONLINE VIDEOS



260/





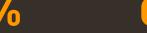


0%



5%

64%







HOW INTERNET USERS WATCH TELEVISION

COMPARISON OF THE METHODS AND DEVICES USED FOR ACCESSING AND DISPLAYING 'TELEVISION' CONTENT



RECORDED CONTENT ON A TV SET

CATCH-UP /
ON-DEMAND
SERVICE ON TV SET

ONLINE CONTENT STREAMED ON A TV SET

ONLINE CONTENT STREAMED ON ANOTHER DEVICE











79%

17%

10%

22%

14%

SOCIAL MEDIA USE





TOTAL NUMBER
OF ACTIVE SOCIAL
MEDIA USERS

ACTIVE SOCIAL USERS
AS A PERCENTAGE OF
THE TOTAL POPULATION

TOTAL NUMBER
OF SOCIAL USERS
ACCESSING VIA MOBILE

ACTIVE MOBILE SOCIAL USERS AS A PERCENTAGE OF THE TOTAL POPULATION







25.00
MILLION

75%

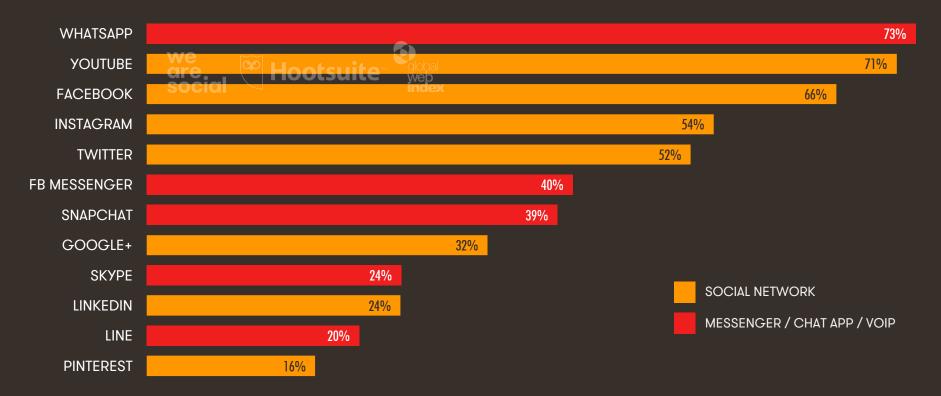
18.00 MILLION

JAN 2018

MOST ACTIVE SOCIAL MEDIA PLATFORMS

332NM

SURVEY-BASED DATA: FIGURES REPRESENT USERS' OWN CLAIMED / REPORTED ACTIVITY







FACEBOOK USAGE ANALYSIS

A CLOSER LOOK AT FACEBOOK USE, BROKEN DOWN BY MOBILE USE AND SELF-DECLARED GENDER OF USERS



TOTAL NUMBER OF MONTHLY ACTIVE FACEBOOK USERS

ANNUAL CHANGE IN FACEBOOK USERS vs. JANUARY 2017 PERCENTAGE OF FACEBOOK USERS ACCESSING VIA MOBILE PERCENTAGE OF FACEBOOK PROFILES DECLARED AS FEMALE

PERCENTAGE OF FACEBOOK PROFILES DECLARED AS MALE











25.00 MILLION

+32%

72%

28%

PROFILE OF FACEBOOK USERS

A BREAKDOWN OF THE COUNTRY'S FACEBOOK'S USERS BY AGE AND GENDER, IN MILLIONS





AGE	TOTAL	FEMALE	MALE
TOTAL	25,000,000	28%	72%
13 – 17	800,000	1%	2%
18 – 24	6,200,000	8%	17%
25 - 34	10,000,000	10%	31%
35 - 44	5,300,000	6%	15%
45 - 54	1,600,000	2%	5%
55 - 64	420,000	0.4%	1%
65+	340,000	0.5%	0.8%







AVERAGE FACEBOOK PAGE POST REACH

AVERAGE MONTHLY GROWTH IN PAGE LIKES ('FANS'), AVERAGE REACH OF PAGE POSTS vs. PAGE LIKES, AND PAID MEDIA



AVERAGE MONTHLY
CHANGE IN PAGE LIKES

AVERAGE POST REACH vs. PAGE LIKES

AVERAGE ORGANIC REACH vs. PAGE LIKES

PERCENTAGE OF PAGES
USING PAID MEDIA

AVERAGE PAID REACH vs. TOTAL REACH











+0.86%

9.4%

5.2%

37.1%

29.4%



AVERAGE FACEBOOK ENGAGEMENT RATES

THE NUMBER OF PEOPLE WHO ENGAGE WITH A FACEBOOK PAGE'S POSTS vs. THE NUMBER OF PEOPLE THAT THOSE POSTS REACH

AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE POSTS (ALL TYPES) AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE VIDEO POSTS AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE PHOTO POSTS AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE LINK POSTS AVERAGE ENGAGEMENT RATE FOR FACEBOOK PAGE STATUS POSTS











2.89%

3.15%

5.72%

3.50%

4.68%





INSTAGRAM USAGE ANALYSIS

AN OVERVIEW OF MONTHLY ACTIVE INSTAGRAM USERS, BROKEN DOWN BY GENDER



TOTAL NUMBER OF MONTHLY ACTIVE INSTAGRAM USERS

ACTIVE INSTAGRAM
USERS AS A PERCENTAGE
OF TOTAL POPULATION

FEMALE USERS AS A
PERCENTAGE OF ALL
ACTIVE INSTAGRAM USERS

MALE USERS AS A
PERCENTAGE OF ALL
ACTIVE INSTAGRAM USERS







12.00
MILLION

36%

36%





MOBILE USERS vs. MOBILE CONNECTIONS

COMPARING THE NUMBER OF UNIQUE MOBILE USERS TO THE NUMBER OF MOBILE CONNECTIONS



NUMBER OF UNIQUE MOBILE USERS (ANY TYPE OF HANDSET)

MOBILE PENETRATION (UNIQUE USERS vs. TOTAL POPULATION)

TOTAL NUMBER
OF MOBILE
CONNECTIONS

MOBILE CONNECTIONS
AS A PERCENTAGE OF
TOTAL POPULATION

AVERAGE NUMBER OF CONNECTIONS PER UNIQUE MOBILE USER











23.66 MILLION

71%

56.80 MILLION

171%

2.40

MOBILE CONNECTIONS BY TYPE

BASED ON THE NUMBER OF CELLULAR CONNECTIONS (NOTE: NOT UNIQUE INDIVIDUALS)



TOTAL NUMBER
OF MOBILE
CONNECTIONS

MOBILE CONNECTIONS
AS A PERCENTAGE OF
TOTAL POPULATION

PERCENTAGE OF MOBILE CONNECTIONS THAT ARE PRE-PAID PERCENTAGE OF MOBILE CONNECTIONS THAT ARE POST-PAID PERCENTAGE OF MOBILE CONNECTIONS THAT ARE BROADBAND (3G & 4G)











56.80 MILLION

171%

81%

19%



MOBILE CONNECTIVITY INDEX

GSMA INTELLIGENCE'S ASSESSMENT OF THE COUNTRY'S KEY ENABLERS AND DRIVERS OF MOBILE CONNECTIVITY



OVERALL COUNTRY
INDEX SCORE

MOBILE NETWORK INFRASTRUCTURE

AFFORDABILITY OF DEVICES & SERVICES

CONSUMER READINESS

AVAILABILITY OF RELEVANT CONTENT & SERVICES













68.86

OUT OF A MAXIMUM POSSIBLE SCORE OF 100

59.10

OUT OF A MAXIMUM POSSIBLE SCORE OF 100

76.92

OUT OF A MAXIMUM POSSIBLE SCORE OF 100

71.24

OUT OF A MAXIMUM POSSIBLE SCORE OF 100 **69.42**

OUT OF A MAXIMUM POSSIBLE SCORE OF 100





MOBILE ACTIVITIES

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY



PERCENTAGE OF THE POPULATION USING MOBILE MESSENGERS

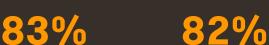
PERCENTAGE OF THE POPULATION WATCHING VIDEOS ON MOBILE

PERCENTAGE OF THE POPULATION PLAYING GAMES ON MOBILE

PERCENTAGE
OF THE POPULATION
USING MOBILE BANKING

PERCENTAGE OF THE POPULATION USING MOBILE MAP SERVICES







67%



43%



74%

SMARTPHONE LIFE MANAGEMENT ACTIVITIES

PERCENTAGE OF THE TOTAL POPULATION USING A SMARTPHONE TO PERFORM EACH TASK [SURVEY-BASED]

USE THE ALARM CLOCK FUNCTION





MANAGE DIARY
OR APPOINTMENTS



CHECK THE WEATHER



TRACK HEALTH, DIET, OR ACTIVITY LEVELS



34%

35%

54%

TAKE PHOTOS OR VIDEOS



64%

CHECK THE NEWS

30%



52%

READ E-BOOKS OR E-MAGAZINES



25%

MANAGE LISTS (E.G. SHOPPING, TASKS)



FINANCIAL INCLUSION FACTORS



PERCENTAGE OF THE POPULATION AGED 15+ THAT REPORTS OWNING OR USING EACH FINANCIAL PRODUCT OR SERVICE

90

HAS A BANK ACCOUNT



69%

HAS A CREDIT CARD



12%

MAKES AND / OR RECEIVES MOBILE PAYMENTS VIA GSMA



[N/A]

MAKES ONLINE PURCHASES AND / OR PAYS BILLS ONLINE



16%

PERCENTAGE OF WOMEN WITH A CREDIT CARD



00

5%

PERCENTAGE OF MEN WITH A CREDIT CARD



16%

PERCENTAGE OF WOMEN MAKING INTERNET PAYMENTS



8%

PERCENTAGE OF MEN
MAKING INTERNET PAYMENTS







E-COMMERCE ACTIVITIES IN PAST 30 DAYS

化化学学

SEARCHED ONLINE **FOR A PRODUCT** OR SERVICE TO BUY

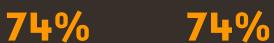
VISITED AN ONLINE RETAIL STORE

SURVEY-BASED DATA: FIGURES REPRESENT RESPONDENTS' SELF-REPORTED ACTIVITY

PURCHASED A **PRODUCT OR SERVICE ONLINE**

MADE AN ONLINE **PURCHASE VIA A LAPTOP** OR DESKTOP COMPUTER MADE AN ONLINE PURCHASE VIA A MOBILE DEVICE







47%



37%



37%

E-COMMERCE SPEND BY CATEGORY

TOTAL ANNUAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS







ELECTRONICS & PHYSICAL MEDIA





FOOD &

PERSONAL CARE



FURNITURE &

APPLIANCES

\$1.679 **MILLION**

\$1,667 **MILLION**

TRAVEL (INCLUDING

ACCOMMODATION)

\$403.7 **MILLION**

\$708.3 **MILLION**

VIDEO

GAMES

TOYS, DIY & HOBBIES

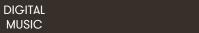




\$673.3 **MILLION**



\$11.1 **MILLION**





\$118.2 **MILLION**







E-COMMERCE GROWTH BY CATEGORY

ANNUAL CHANGE IN THE TOTAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS







ELECTRONICS & PHYSICAL MEDIA



+11%

FOOD & PERSONAL CARE



+12%

FURNITURE & APPLIANCES



+14%

TOYS, DIY & HOBBIES

+13%



+11%

TRAVEL (INCLUDING ACCOMMODATION)



+11%

DIGITAL MUSIC



+7%

VIDEO GAMES



+14%



E-COMMERCE DETAIL: CONSUMER GOODS

AN OVERVIEW OF THE E-COMMERCE MARKET FOR CONSUMER GOODS, WITH VALUES IN UNITED STATES DOLLARS



TOTAL NUMBER OF PEOPLE **PURCHASING CONSUMER GOODS VIA E-COMMERCE**



11.60 **MILLION**

YEAR-ON-YEAR CHANGE:

+11%

PENETRATION OF CONSUMER **GOODS E-COMMERCE** (TOTAL POPULATION)



35%

VALUE OF THE CONSUMER GOODS E-COMMERCE MARKET (TOTAL ANNUAL SALES REVENUE)



BILLION

YEAR-ON-YEAR CHANGE:

+12%

AVERAGE ANNUAL REVENUE PER USER OF CONSUMER GOODS E-COMMERCE (ARPU)



\$469

YEAR-ON-YEAR CHANGE:

+1%









ADVERTISING MEDIA: FIRST AWARENESS



THE CHANNEL THAT FIRST INTRODUCED INTERNET USERS* TO A PRODUCT OR SERVICE THAT THEY SUBSEQUENTLY PURCHASED

