

MEDIABRANDS

SAUDI MEDIA CONSUMPTION

UNCOVERING ACTIONABLE INSIGHTS

APRIL 2022

OVERALL OUTLOOK

KSA'S GROWING POPULATION

As the second largest Arab state with a total population of around 35 million inhabitants, Saudi Arabia is expanding and has a current

GROWTH RATE OF 1.59%

– a percentage that analysts say will continue to increase steadily till 2060.

The majority of this growing population in KSA is expected to be:

A. YOUNG B. TECH SAVVY C. HYPER-CONNECTED

MEDIABRANDS research study's goal is to understand customer behavior in KSA through:

- 1. MEDIA USAGE**
- 2. TIME SPENT**
- 3. CONSUMER LIFESTYLES**
- 4. TECHNOLOGY ADOPTION**
- 5. SHOPPING HABITS**

SOCIAL MEDIA CONSUMPTION

Penetration of going online on any device in KSA is

95%.

On average,

 **INSTAGRAM (76%)**

 **SNAPCHAT (73%)**

 **TWITTER (71%)**

 **TIKTOK (58%)**

 **FACEBOOK (51%)**

all see a high penetration of platform usage (used last month).

21%

used a social network site

15%

watched video content

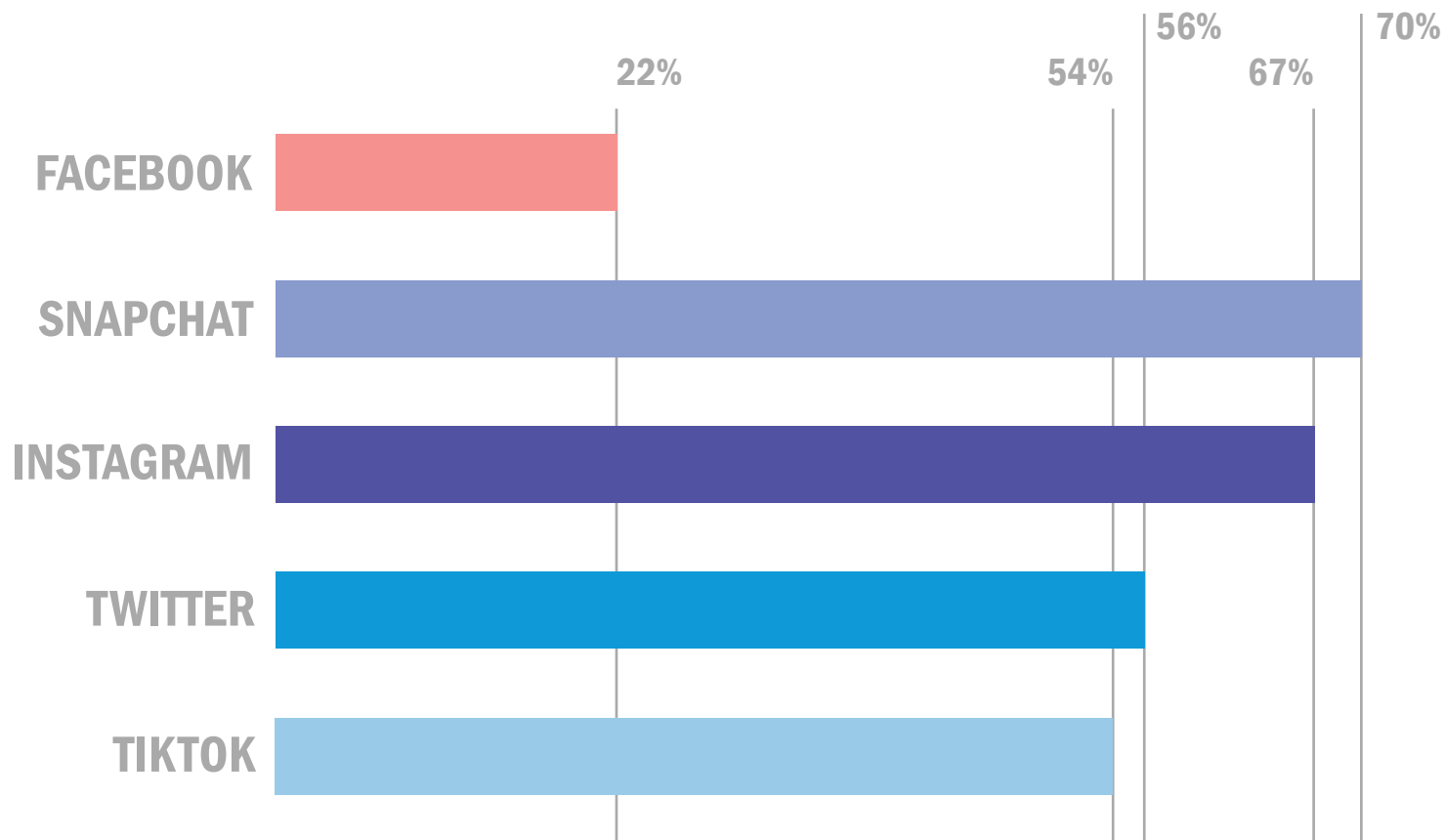
FOR MORE THAN 5 HOURS

The highest share amongst age groups on Snapchat & TikTok was **16-24** year old's with Snap (32%) & TikTok (33%).

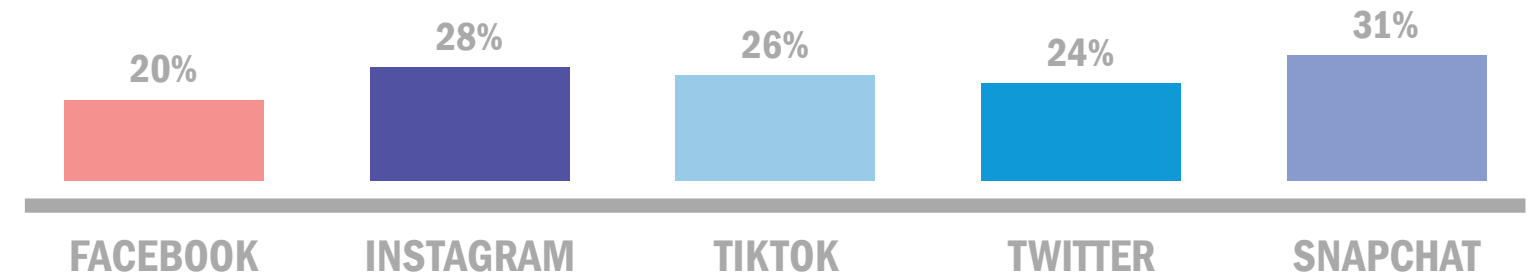
SOCIAL PLATFORMS USAGE

Most popular platforms in KSA:

- built on video content
- highest penetration amongst 16-24 year olds
- watching videos at least once a week



MORE THAN 1/5TH OF THE SAUDI POPULATION SPEND 3+ HOURS CONSUMING VIDEO CONTENT



Usage of social platforms by affluent people (HHI SAR 20K+)

- 75% PENETRATION IN LAST 30 DAYS
- 54% USAGE AT LEAST ONCE A WEEK
- 33% TIME SPENT 3+ HOURS A DAY

USER ENGAGEMENT

To make it easy to spend hours on a platform without getting bored, video content should be:

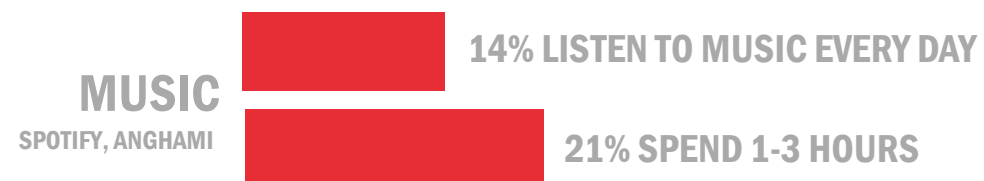
FRESH
SHORT
DIGESTIBLE

Brands should look to develop content that steers away from being product/sales focused and is:

- 1 CREATIVE**
- 2 RELEVANT TO THE REGION**
- 3 RESONATING WITH CUSTOMERS**

This will entice them to interact with the brand online.

Some key statistics revealed in terms of time spent online that brands can use to engage with their audiences:



OTT PLATFORMS

An unprecedented rise in the popularity of streaming videos on OTT platforms is observed in KSA.

Due to the huge Saudi & Arab population craving local content, brands should focus on:

- 1 ARABIC CONTENT**
- 2 CULTURAL ASPECTS**
- 3 LOCALLY RELEVANT CAMPAIGNS**

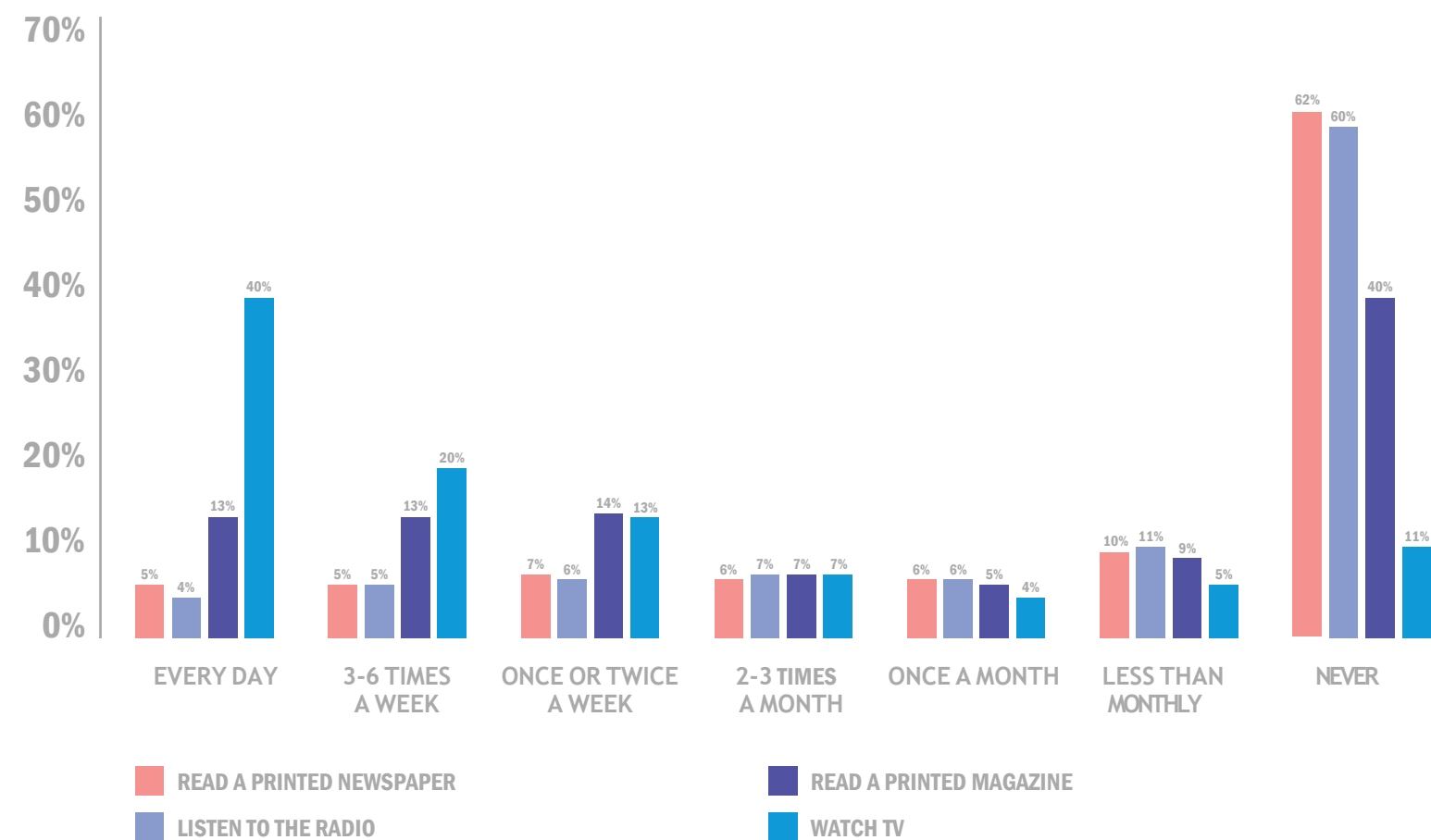
Here's the popularity of OTT platforms in terms of subscription in KSA:



TRADITIONAL MEDIA

TV penetration in KSA is 89% mostly over 2 hours while print readership (newspapers & magazines) have low engagement in terms of time spent.

FREQUENCY OF OFFLINE ACTIVITIES



TIME SPENT ON OFFLINE ACTIVITIES

	NEWSPAPER	RADIO	MAGAZINE	TV
15 MINUTES OR LESS	20%	17%	19%	8%
BETWEEN 15 & 30 MINUTES	15%	11%	17%	5%
30 MINUTES TO 1 HOUR	16%	15%	16%	8%
MORE THAN 1 BUT LESS THAN 2 HOURS	14%	16%	11%	13%
2 TO 3 HOURS	10%	14%	11%	21%
MORE THAN 3 BUT LESS THAN 4 HOURS	9%	9%	8%	15%
4 TO 5 HOURS	9%	9%	10%	14%
MORE THAN 5 HOURS	9%	8%	8%	16%

TOPICS OF INTEREST & VALUES PERCEIVED IN KSA

44% BOUGHT FASHION & SPORTS CLOTHING IN LAST 6 MONTHS OR PLANNING TO BUY IN NEXT 6 MONTHS

Majority of population in KSA is business oriented. Here is the distribution of users based on their intent to build their own enterprise:



Growth of E-commerce over traditional retail stores due to ease of access to technology has contributed to

HIGHEST PENETRATION OF

87%

with 66% spent up to 2 hours.

When it comes to the core values for Saudis, the results were clear and shown below:

RESPECT FOR PARENTS & ELDERS



ABILITY TO ACHIEVE PERSONAL GOALS



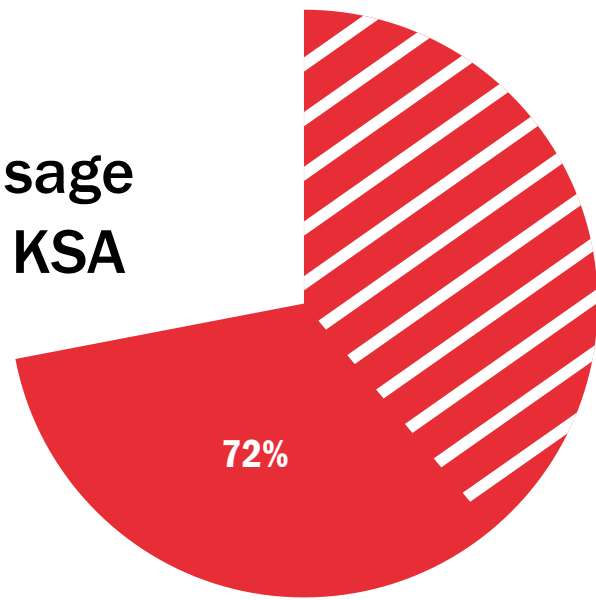
A hand holding a smartphone with various social media icons overlaid on the screen. The icons include gears, an envelope, a globe, two people, a magnifying glass, a Wi-Fi symbol, a star, a heart, a link, a USB symbol, and a share symbol. The background is a blurred image of a person's face.

OTHER NOTABLE REPORT

FINDINGS BY SOCIAL PLATFORM

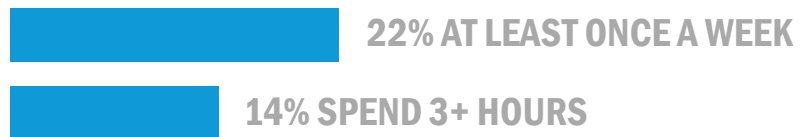
FACEBOOK

Smartphone usage penetration in KSA

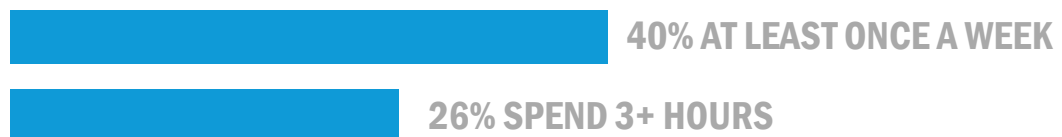


54% OF THE 72% ARE FACEBOOK USERS

16-24 YEAR OLDS



AFFLUENT USERS (HHI SAR 20K+)

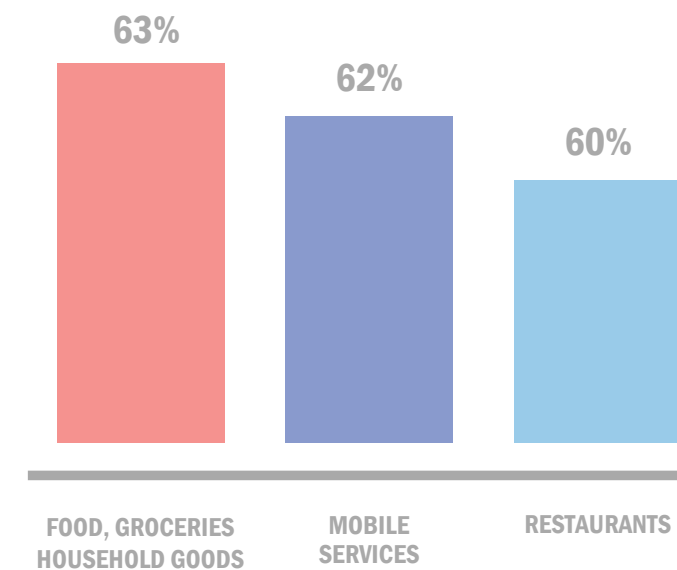


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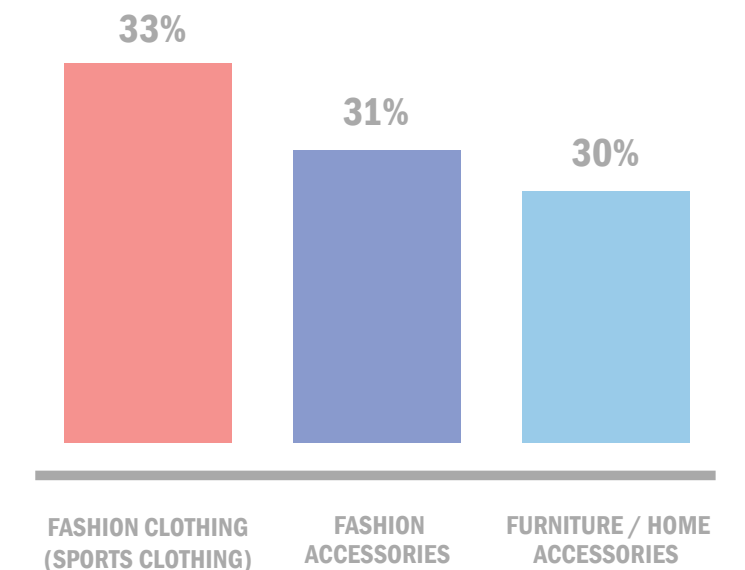
INTERESTING HIGH USER STATS:

43% OF FACEBOOK USERS USUALLY BUY HIGH END BRANDS

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO FACEBOOK USERS

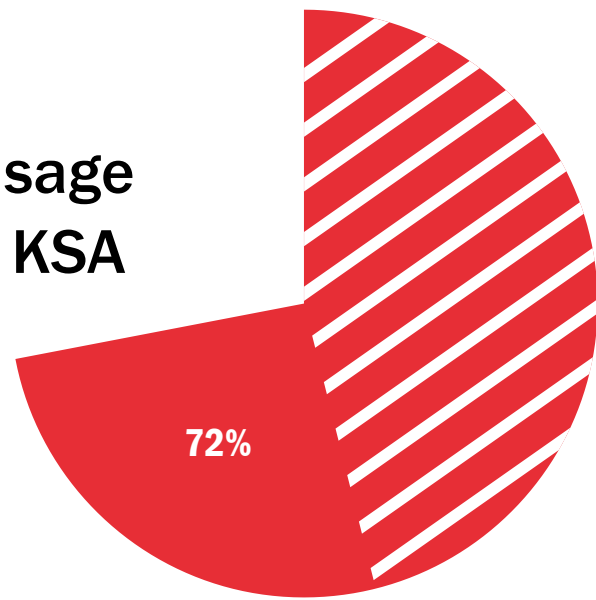


TOP 3 ITEMS FACEBOOK USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



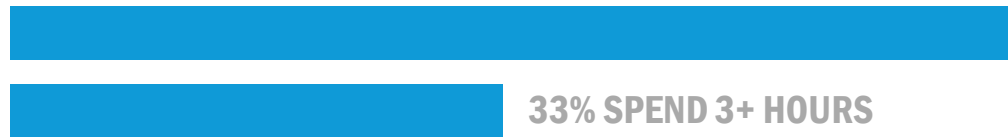
INSTAGRAM

Smartphone usage penetration in KSA



64% OF THE 72% ARE INSTAGRAM USERS

16-24 YEAR OLDS



67% AT LEAST ONCE A WEEK

33% SPEND 3+ HOURS

AFFLUENT USERS (HHI SAR 20K+)



60% AT LEAST ONCE A WEEK

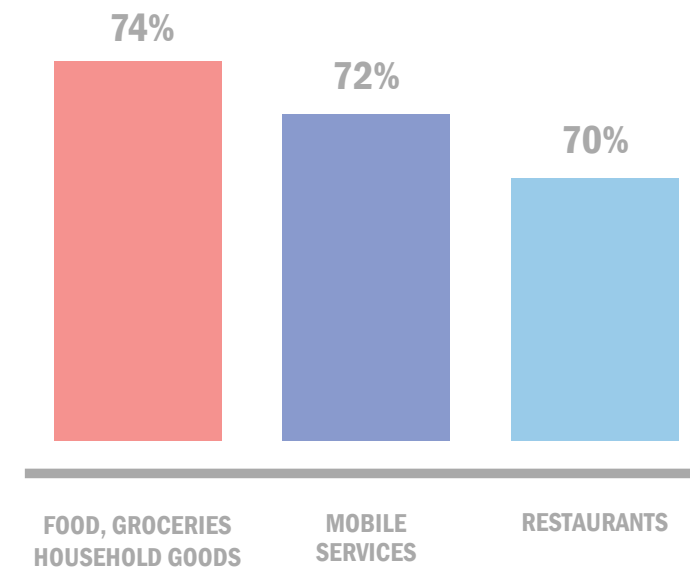
34% SPEND 3+ HOURS

MEDIABRANDS

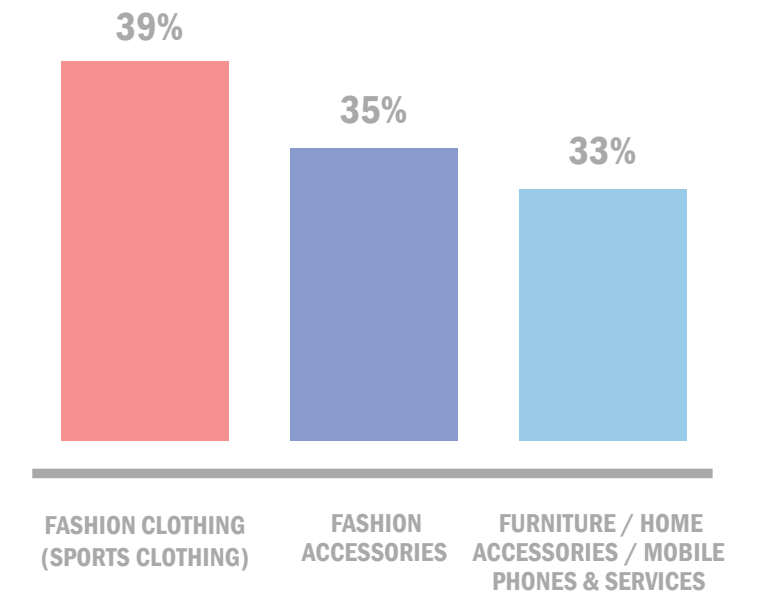
INTERESTING HIGH USER STATS:

60% OF INSTAGRAM USERS DO SOME FORM OF SPORT/EXERCISE AT LEAST TWICE A WEEK

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO INSTAGRAM USERS

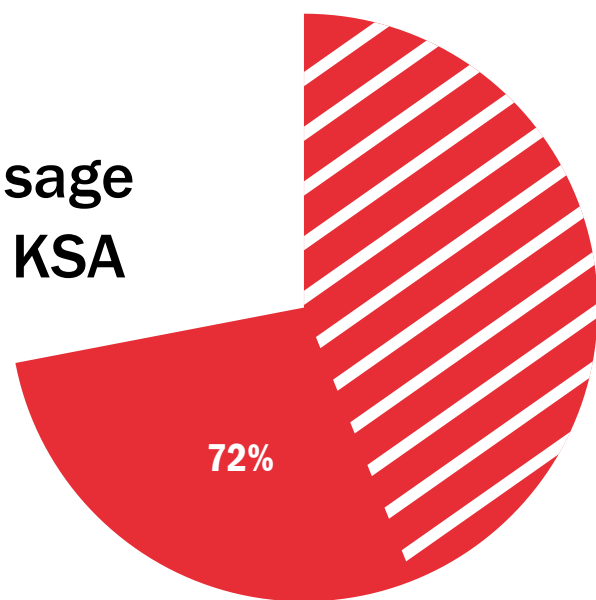


TOP 3 ITEMS INSTAGRAM USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



TWITTER

Smartphone usage penetration in KSA

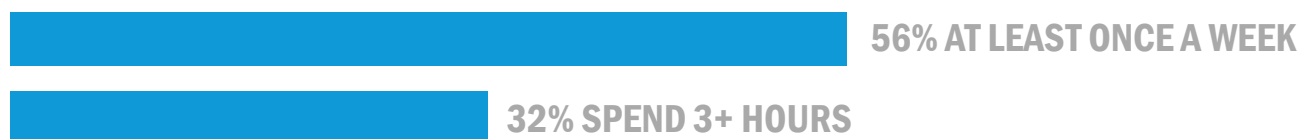


61% OF THE 72% ARE TWITTER USERS

16-24 YEAR OLDS



AFFLUENT USERS (HHI SAR 20K+)

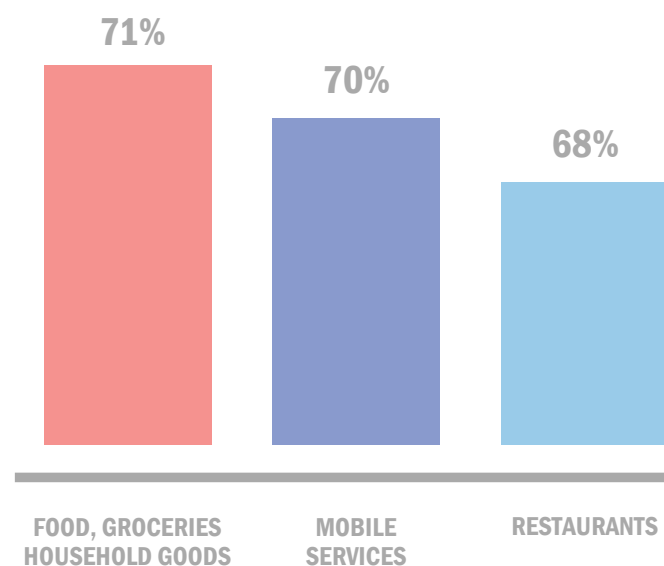


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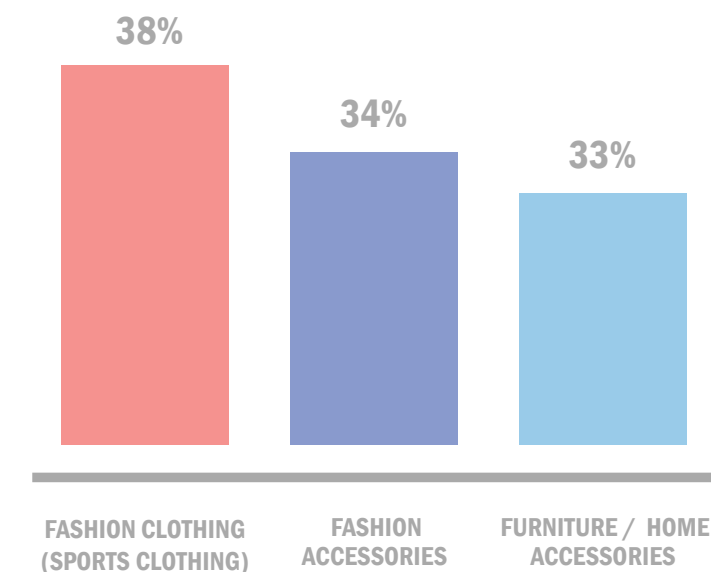
INTERESTING HIGH USER STATS:

70% OF TWITTER USERS WOULD LIKE TO SET UP THEIR OWN BUSINESS ONE DAY

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO TWITTER USERS

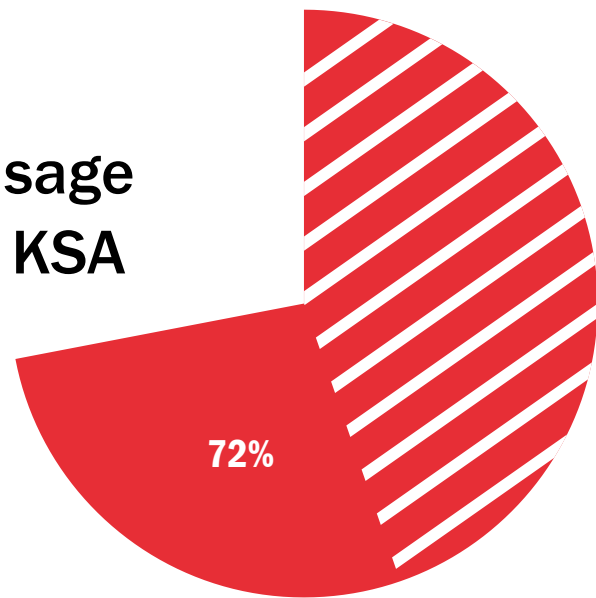


TOP 3 ITEMS TWITTER USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



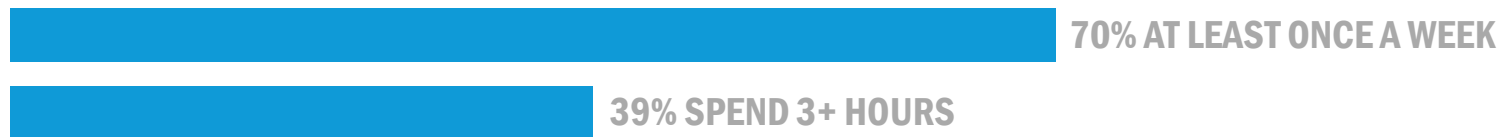
SNAPCHAT

Smartphone usage penetration in KSA



62% OF THE 72% ARE SNAPCHAT USERS

16-24 YEAR OLDS



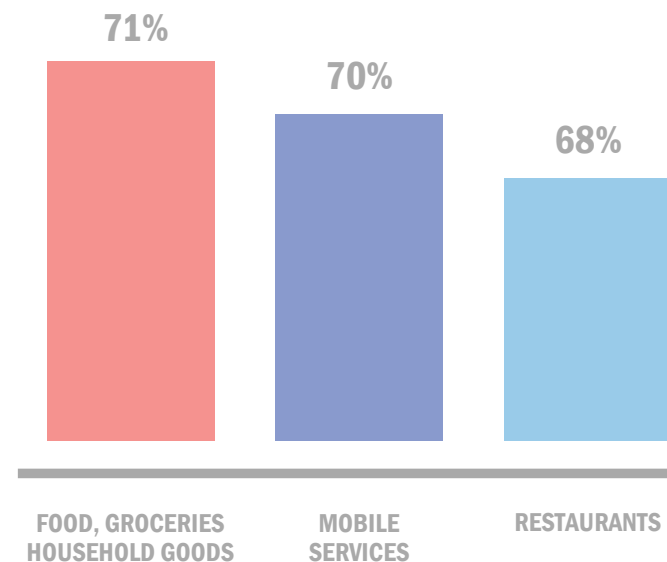
AFFLUENT USERS (HHI SAR 20K+)



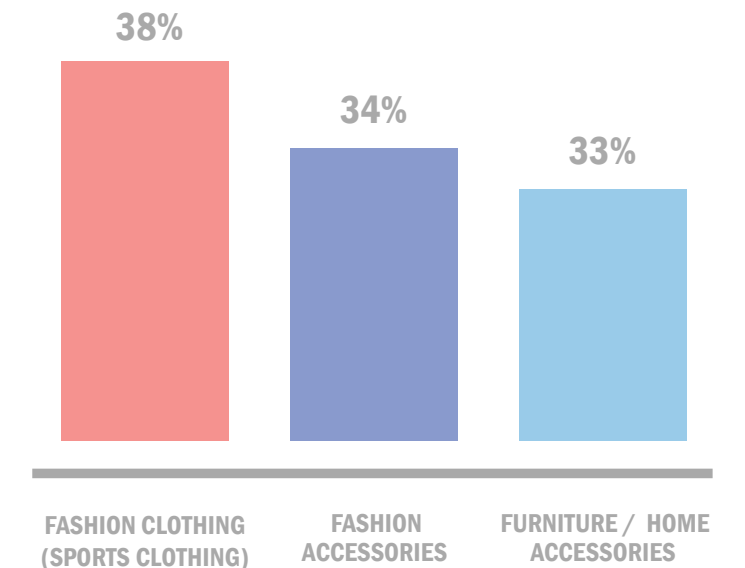
INTERESTING HIGH USER STATS:

70% OF SNAPCHAT USERS WOULD LIKE TO SET UP THEIR OWN BUSINESS ONE DAY

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO SNAPCHAT USERS

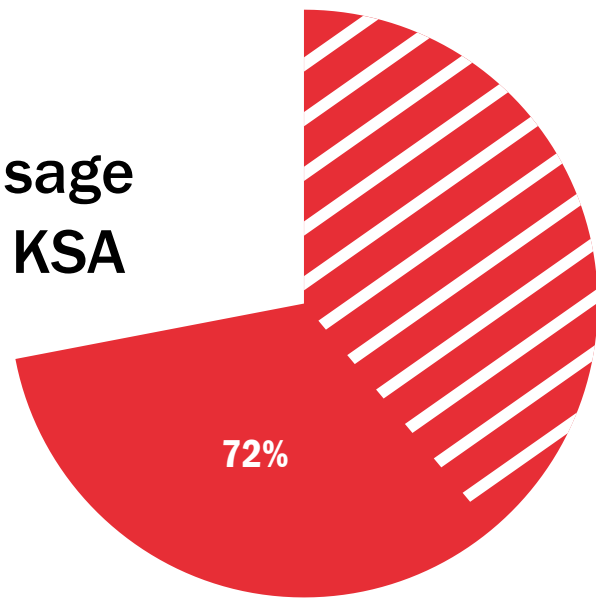


TOP 3 ITEMS SNAPCHAT USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



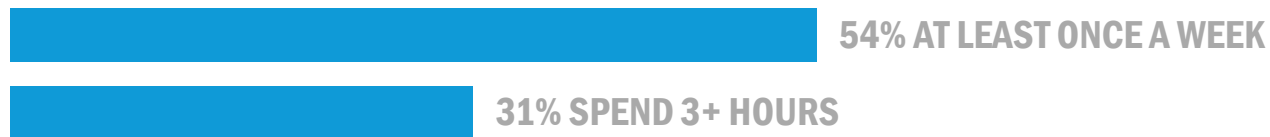
TIKTOK

Smartphone usage penetration in KSA

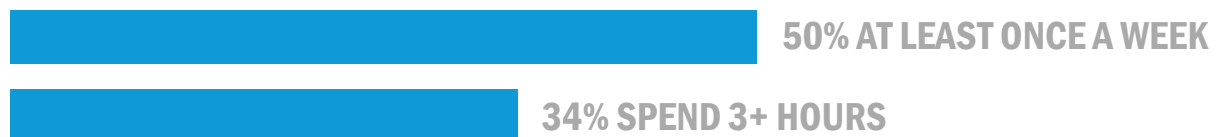


54% OF THE 72% ARE TIKTOK USERS

16-24 YEAR OLDS



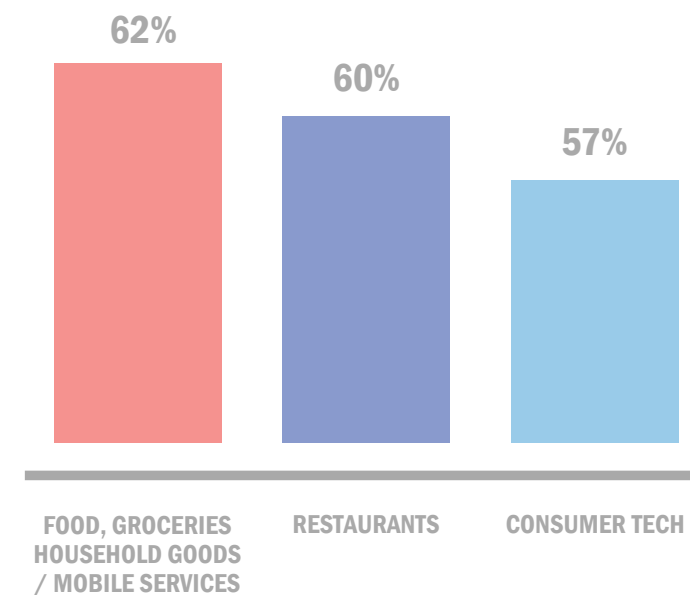
AFFLUENT USERS (HHI SAR 20K+)



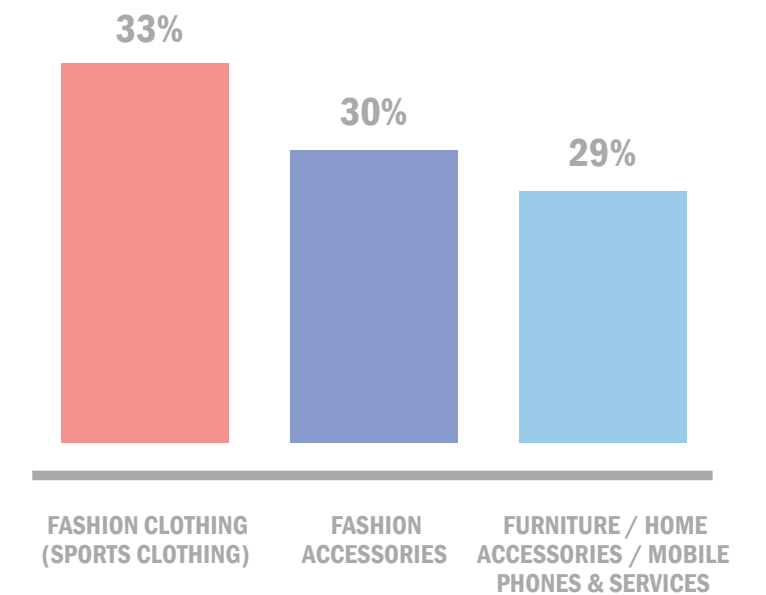
INTERESTING HIGH USER STATS:

70% OF TIKTOK USERS GO ONLINE ON ANY DEVICE FOR 4+ HOURS

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO TIKTOK USERS

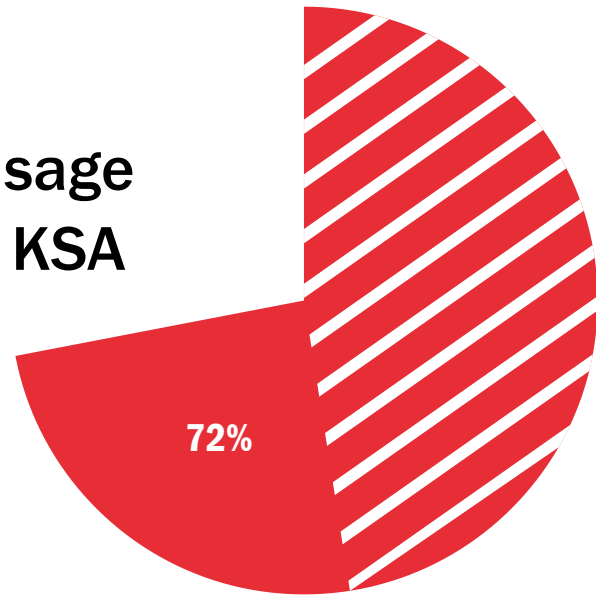


TOP 3 ITEMS TIKTOK USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



YOUTUBE

Smartphone usage penetration in KSA

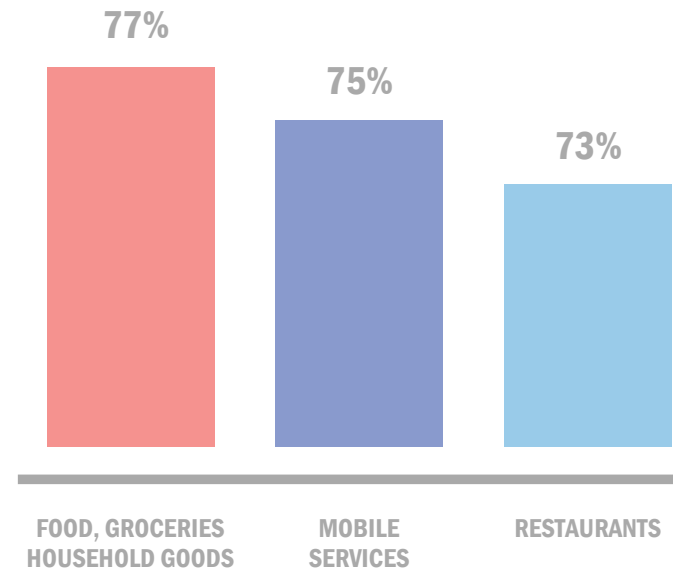


66% OF THE 72% ARE YOUTUBE USERS

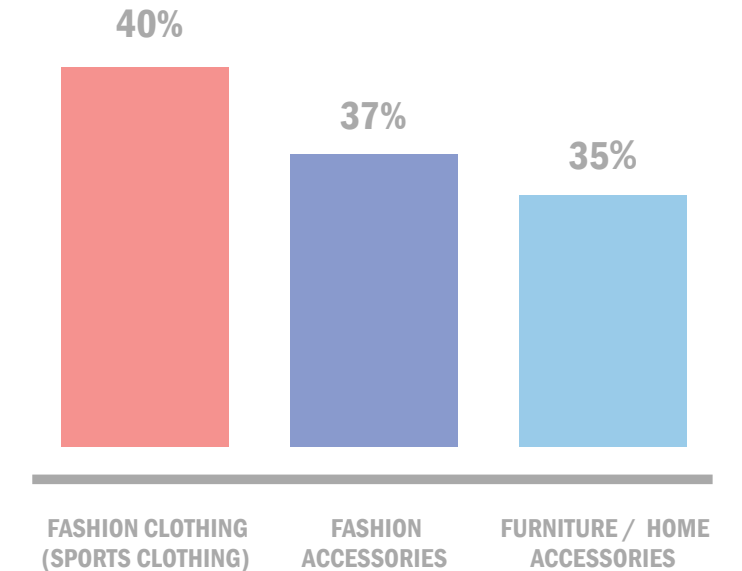
INTERESTING HIGH USER STATS:

76% OF YOUTUBE USERS WOULD LIKE TO SET UP THEIR OWN BUSINESS ONE DAY

TOP 3 TOPICS / PRODUCTS / SERVICES OF INTEREST TO YOUTUBE USERS



TOP 3 ITEMS YOUTUBE USERS SAY THEY WILL BUY IN THE NEXT 6 MONTHS



CONCLUSION

Brands can penetrate the KSA market by being:

- 1 EFFECTIVELY ENGAGING NOW**
- 2 RELEVANT TO THE CONSUMER'S INTEREST**

This allows brands to resonate with Saudi consumers and become **“TOP OF MIND”**.

Though trends in consumer behavior have changed, brands did the right thing by adapting to adhere to consumer preference.

While brands maintained their budget online to meet customer demands,

BUDGET OPTIMIZATION

is crucial for sustainable gains across all platforms.

THANK YOU!

MEDIABRANDS

CONTACT US

MENATinsights@mbww.com

IPG MEDIABRANDS - MENA's Connections Panel (A hybrid quantitative study fielded for 6 weeks in June '21, speaking to 2,500 across the Kingdom to identify the different media and shopping habits)