



## **Advance Sports Marketing Theory and Practice**

### **MENA Adoption of the Global Sports Business Marketing Evaluation**

*This case study is for education only and does not suggest any good or bad practice on the part of anyone mentioned in the case study.*

**Keith Scully**

Georgetown University  
Strategic-Noise Group CEO

## ABSTRACT

MENA is a fast-emerging sports hub with the increased investment and growth of one the most exciting markets on the globe. Companies and individuals from the area have invested deeply in sports both the region and on the international scene. As for the political instability argument, there are 22 Arab countries, and while there are pockets of political unrest in some of the countries, this should not deter one from noticing the rise of opportunities across the majority of countries in the greater Middle East North Africa (MENA) area.

With Qatar holding the FIFA World Cup in 2022, the world's eyes are focusing more every day on the region. This opportunity, with the continued investment from both state and businesses, should enhance the rapid growth and global recognition. International sporting franchises and personalities have continued to mature successful authentic sports relationships in the region helping to build success in the growth of sports in the MENA.

The purpose of this case study was to investigate international sports marketing influencers and how they relate to the MESA regional. Key metrics will focus on strategic marketing evolution with a particular focus on the fast-emerging sports opportunities for MENA's local and regional states, plus the more significant global for demand creation (BIG OPPORTUNITIES!).

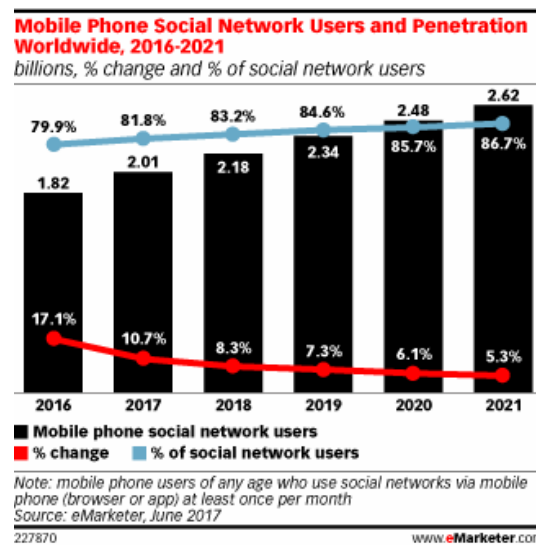
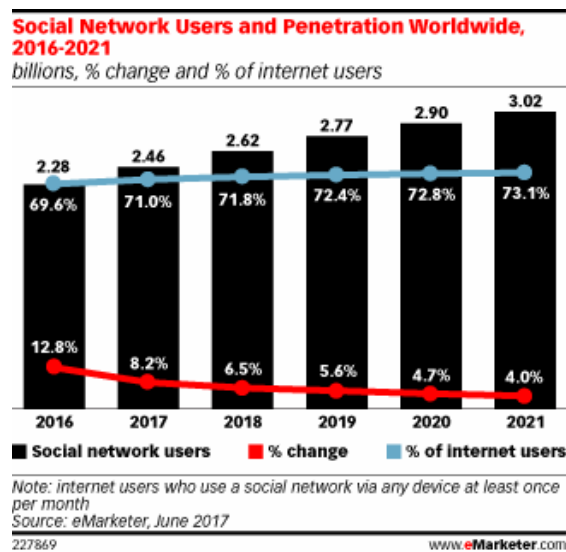
“Think Global, Act Local” in its own right, a slogan is known by a significant percentage of the global marketing populations can, therefore, be used for a whole range of brands, cities, countries, products, and developments. (International HR Forum, 2010) What is important to note is that this slogan has never been more critical for strategizing market thinking, and in particular in the MENA.

With a population of about 350mn, the Middle East currently alone has a GDP of 2.5 trillion (source: International Monetary Fund), which surprisingly surpasses GDPs of countries like India at 2.2 trillion.

## LITERATURE REVIEW

### *Global Marketing Platforms*

"For much of the world, social networks are a way to stay connected with friends and family," said Corey McNair, forecasting analyst at eMarketer.



"In recent years, leading platforms Facebook and Twitter have faced competition from Snapchat and messaging apps like WeChat, which eMarketer does not include in its social network definition, that have adopted overlapping features and services." (McNair)

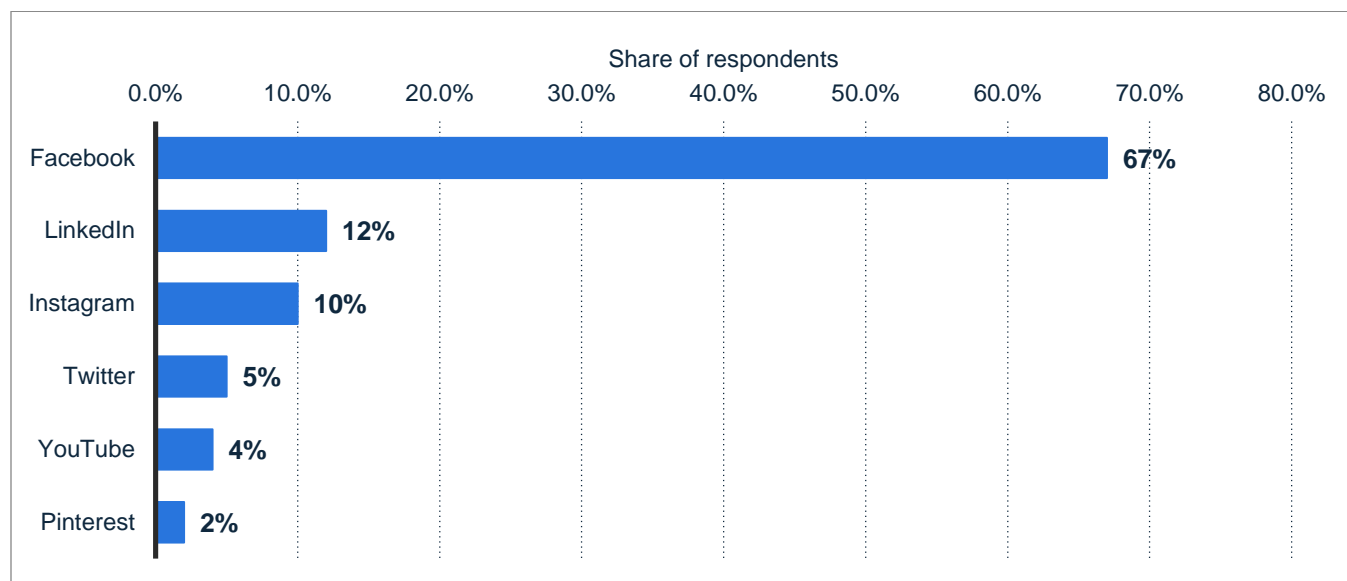
At least 71.0 per cent of internet users worldwide will access social networking sites regularly this year. (eMarketer, 2017)

Most user growth will be driven by the widespread availability of affordable smartphones, accessible Wi-Fi coverage and expanding 3G and 4G networks. Individuals taking advantage of these developments in Asia-Pacific, Latin America, and MENA will largely be new

internet users who are signing up for social media for the first time. In 2017, 81.8 per cent of social network users worldwide will log on via a mobile phone. By 2021, that share will grow to 86.7 per cent. (eMarketer, 2017)

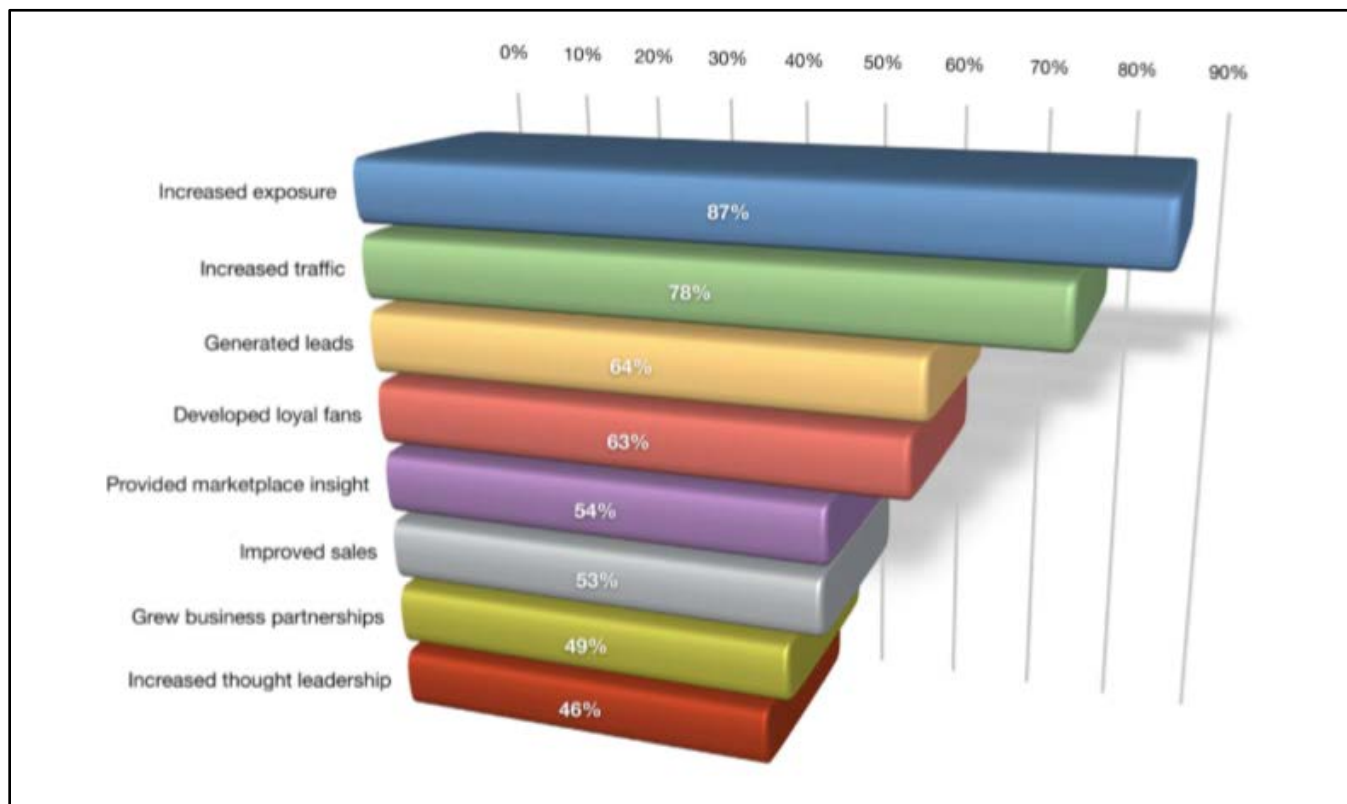
Research has significantly raised estimates for China throughout the forecast based on new data showing social network user growth outperforming expectations, specifically among those 45 and older. Projections have also been raised for the number of social network users in India based on new data. “Altogether, these changes have generated a significant increase in estimates for the number of social network users worldwide.” (eMarketer, 2017)

### ***Most Important Social Media Platforms for Marketers Global***



(Social Media Examiner Jan 2018)

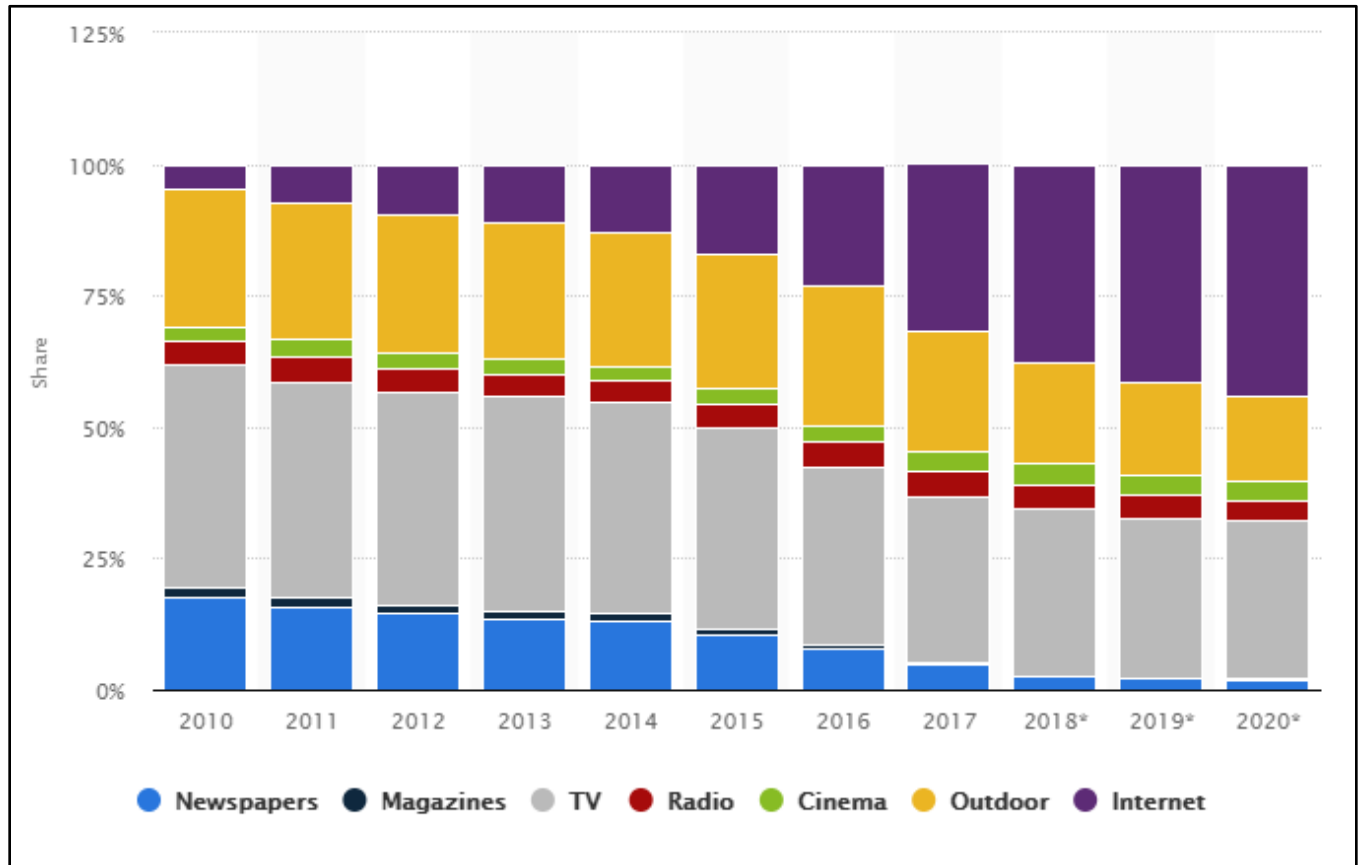
### *Benefits of Social Media Marketing*



Source: Social Media Examiner, 2018

A significant 87 per cent of all marketers indicated that their social media efforts had generated more exposure for their businesses. Increased traffic was the second significant benefit, with 78 per cent reporting positive results. These top two benefits have remained virtually unchanged for four years. (Social Media Examiner, 2018)

### *Distribution of Advertising Spending In Mena from 2010 to 2020, By Medium*

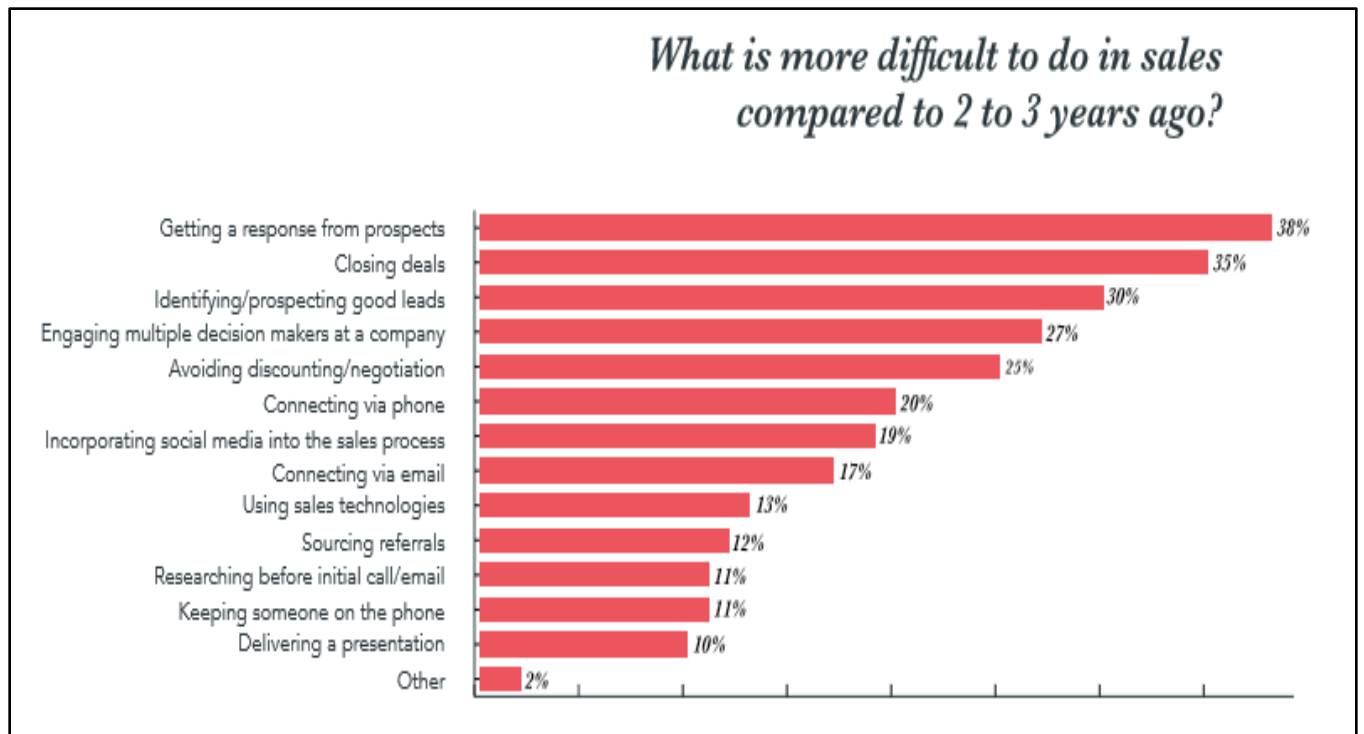


Source: Zenith, 2017

The graph shows the distribution of advertising spending in the Middle East and North Africa region from 2010 to 2017, with a forecast until 2020, broken down by the medium. In 2017, newspaper ad expenditures in the region accounted for 4.7 per cent of total advertising spending that year. (Zenith, 2017)

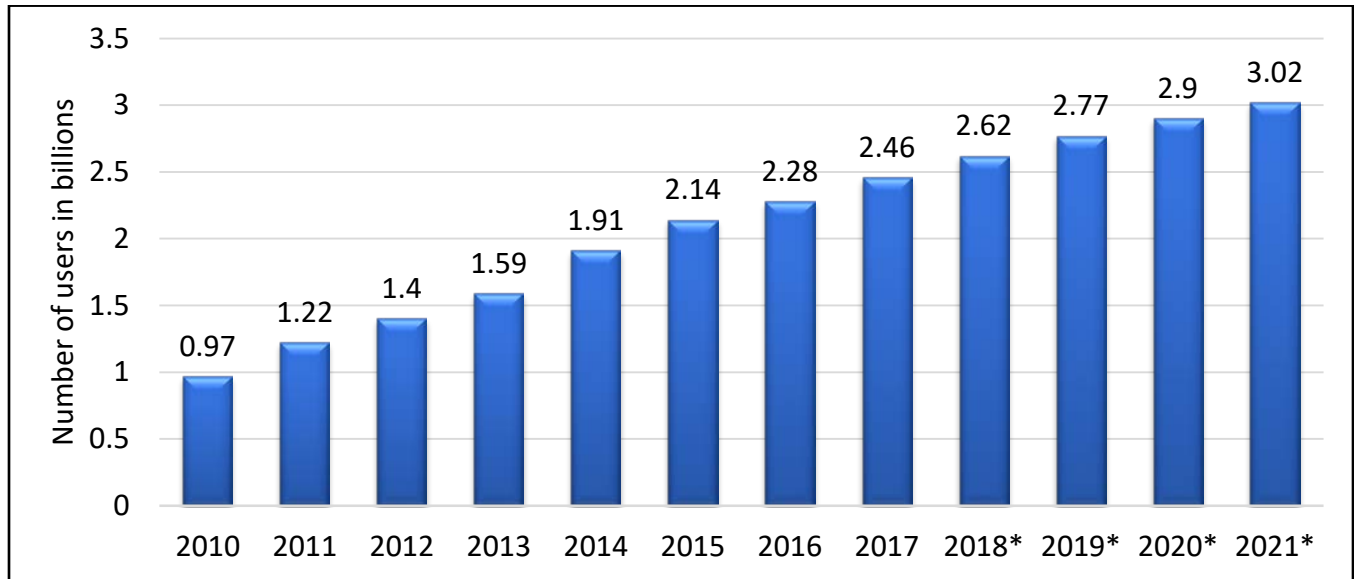
*Marketing and Sales Challenges 2018* (Social Media Examiner Jan 2018)

On the sales side, respondents tell us it is getting harder to elicit a response from a prospect, close deals, and prospect for leads. 19 per cent also say they are struggling to incorporate social media in their sales process, and 13 per cent think using sales technologies is now harder than it used to be.



SOURCE: Social Media Examiner Jan 2018

*Social Network Users Worldwide From 2010 to 2021 (In Billions) (Emarketer 2017)*

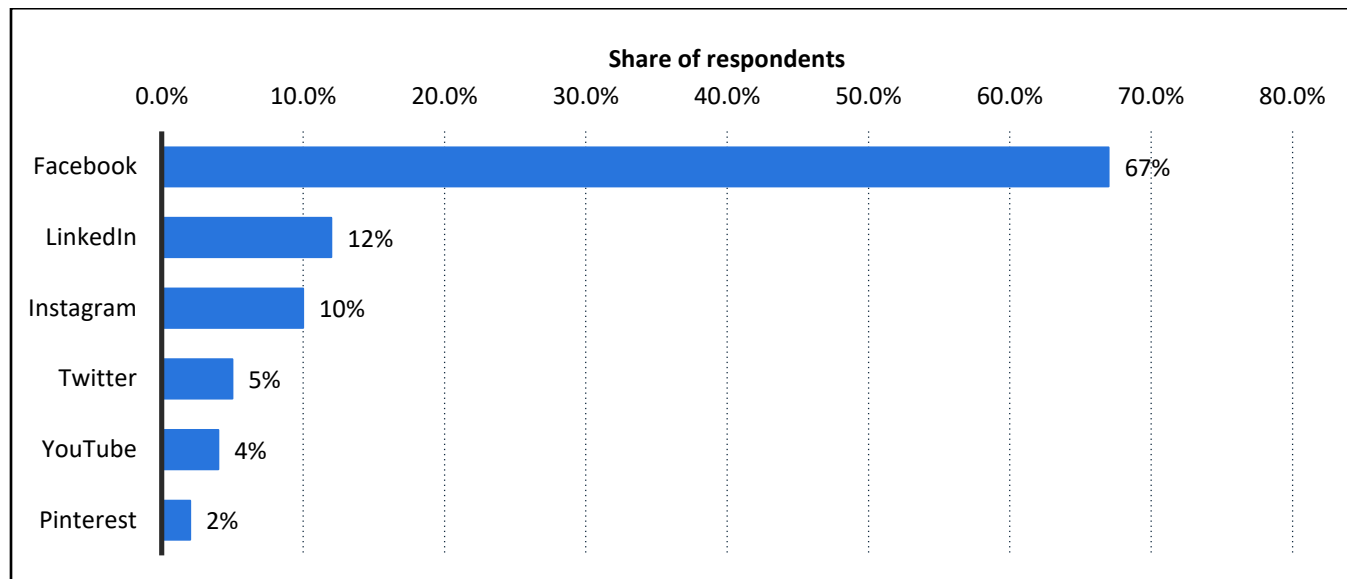


In 2017, 2.46 billion individuals, or one-third of the global population and 71.0 per cent of internet users, will access social networks at least once a month, up 8.2 per cent from 2016. Mobile phone adoption and expanding mobile coverage will drive that growth. "For much of the world, social networks are a way to stay connected with friends and family," said Corey McNair, forecasting analyst at eMarketer.



## MOST IMPORTANT SOCIAL MEDIA PLATFORMS FOR MARKETERS GLOBAL

(Social Media Examiner Jan 2018)



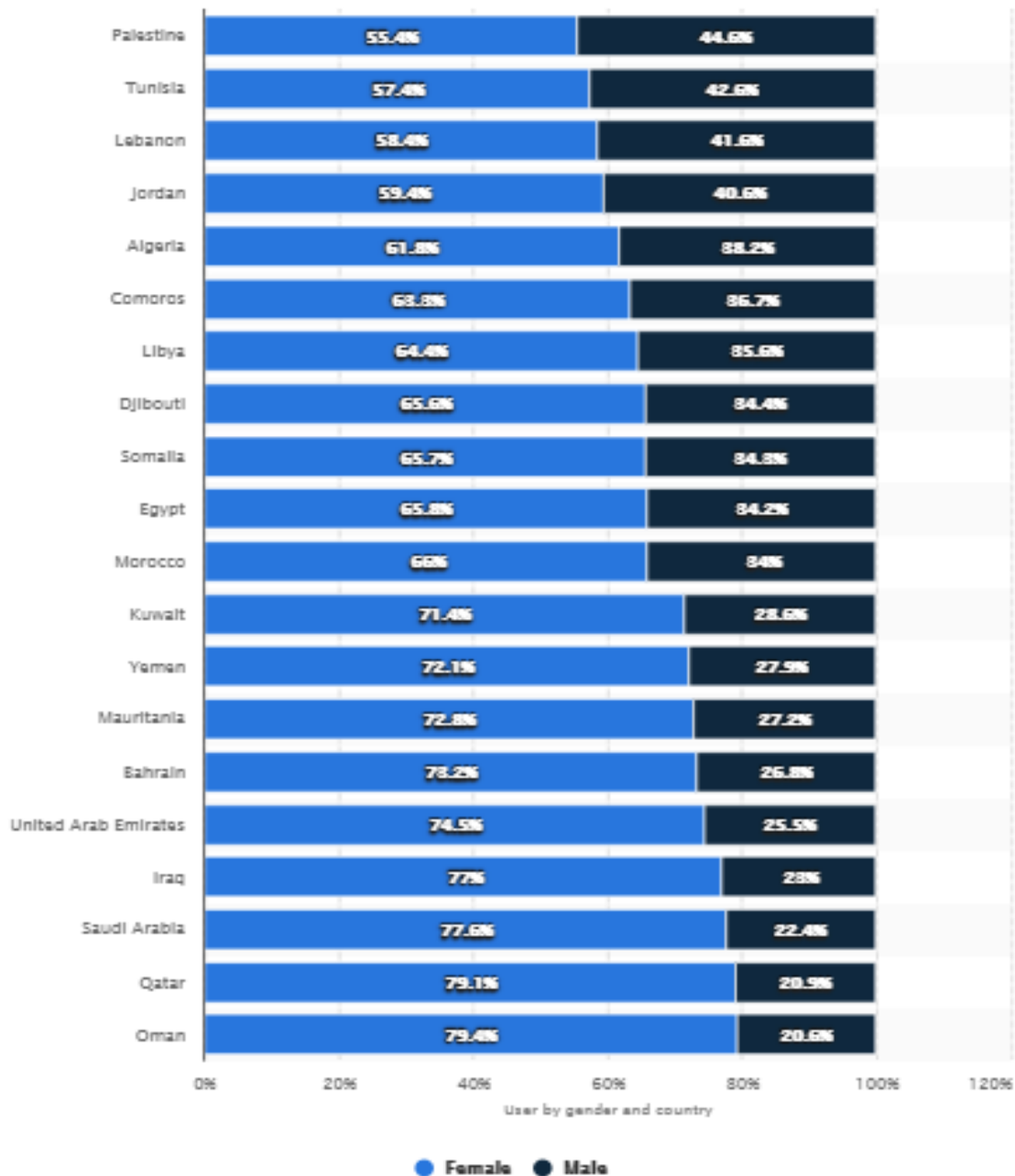
For business, Facebook has taken the lead, by far with 67 per cent of the global market. Like everything with social media and marketing, the numbers are continually evolving and shifting. What happens on a global level is not consistently accurate for regional or local business. The advantage of social media over traditional marketing is the ability to measure outcomes more distinctly while shift strategies fast with less expense.

### **Facebook**

With over 1.86 billion monthly active users, social network Facebook is currently the market leader regarding reach and scope. (HubSpot, 2017) The site has been shaping the social media landscape since its launch and has been an essential factor in discussions about users' privacy and differentiating between the private and the public online self. The important social media platforms for marketers worldwide as of January 2018 was Facebook (Social Media Examiner, 2018).

Facebook Uncertainty: Only 49 per cent of marketers feel their Facebook marketing is effective and 52 per cent said they have seen declines in their organic Facebook reach in the last year. However, 62 per cent plan on increasing their organic activities in the next year. (Social Media Examiner, 2018)

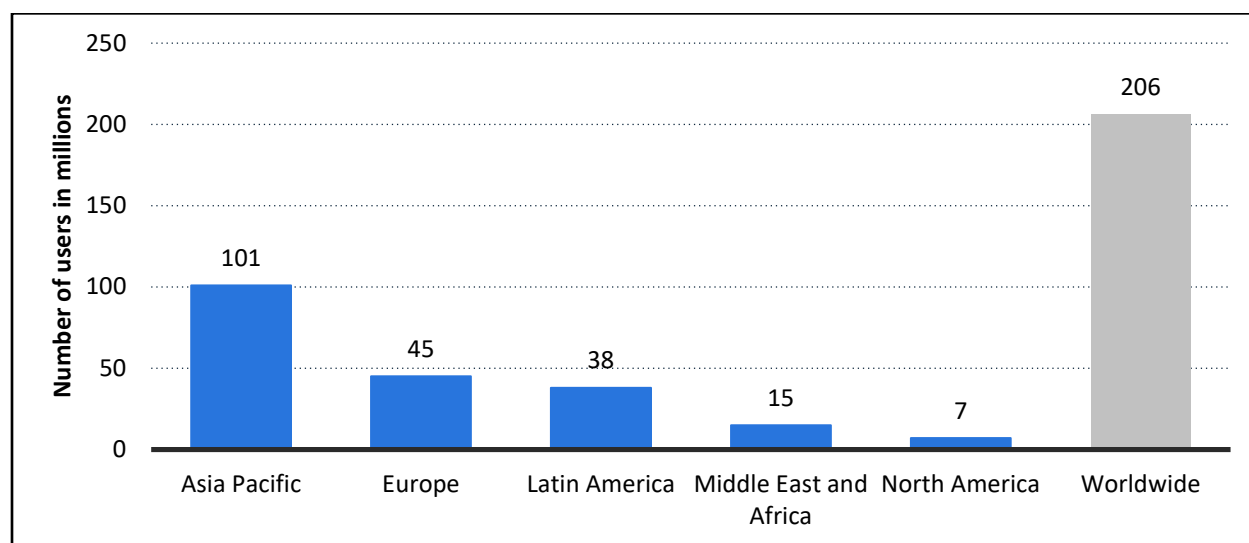
*Share of Facebook User in the MENA in 2017, By Gender and Country*



This statistic described the distribution of Facebook user in the Middle East and North Africa in 2017, broken down by gender in each country. In 2017, the share of female Facebook users in Palestine was 55.4 per cent. (Arab Social Media, 2017 pg40)

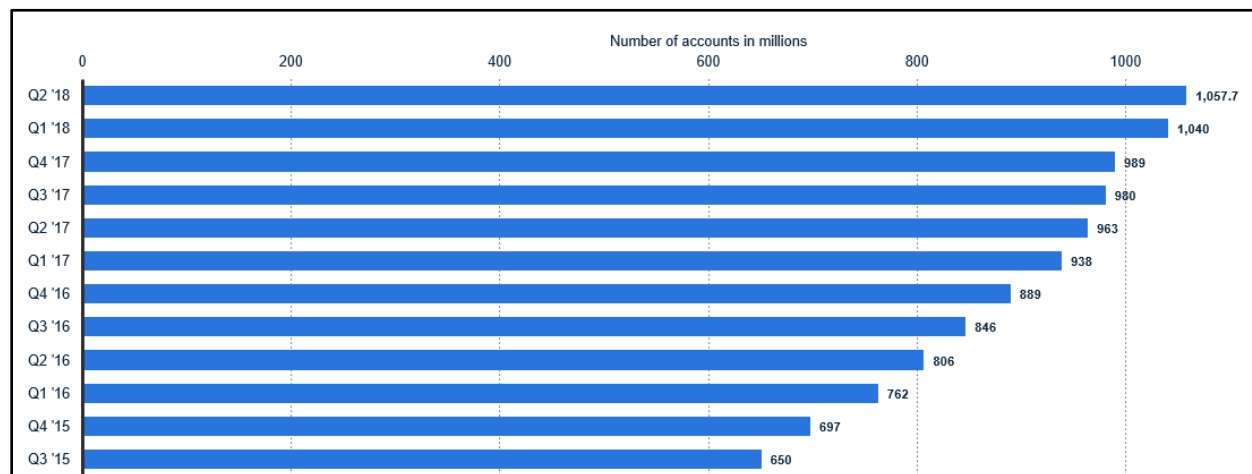
### WhatsApp

2013: WhatsApp messenger audiences in selected global regions as of the fourth quarter of 2013. Ages 16 to 64 mobile internet users were asked: "Which of the following mobile/tablet applications have you used in the past month?" Of the 206 million users most were located in Asia having 101 million while MENA was one of the lowest regions with 15 million. (GlobalWebIndex, 2014)



(Source(s): GlobalWebIndex; [ID 289778](#))

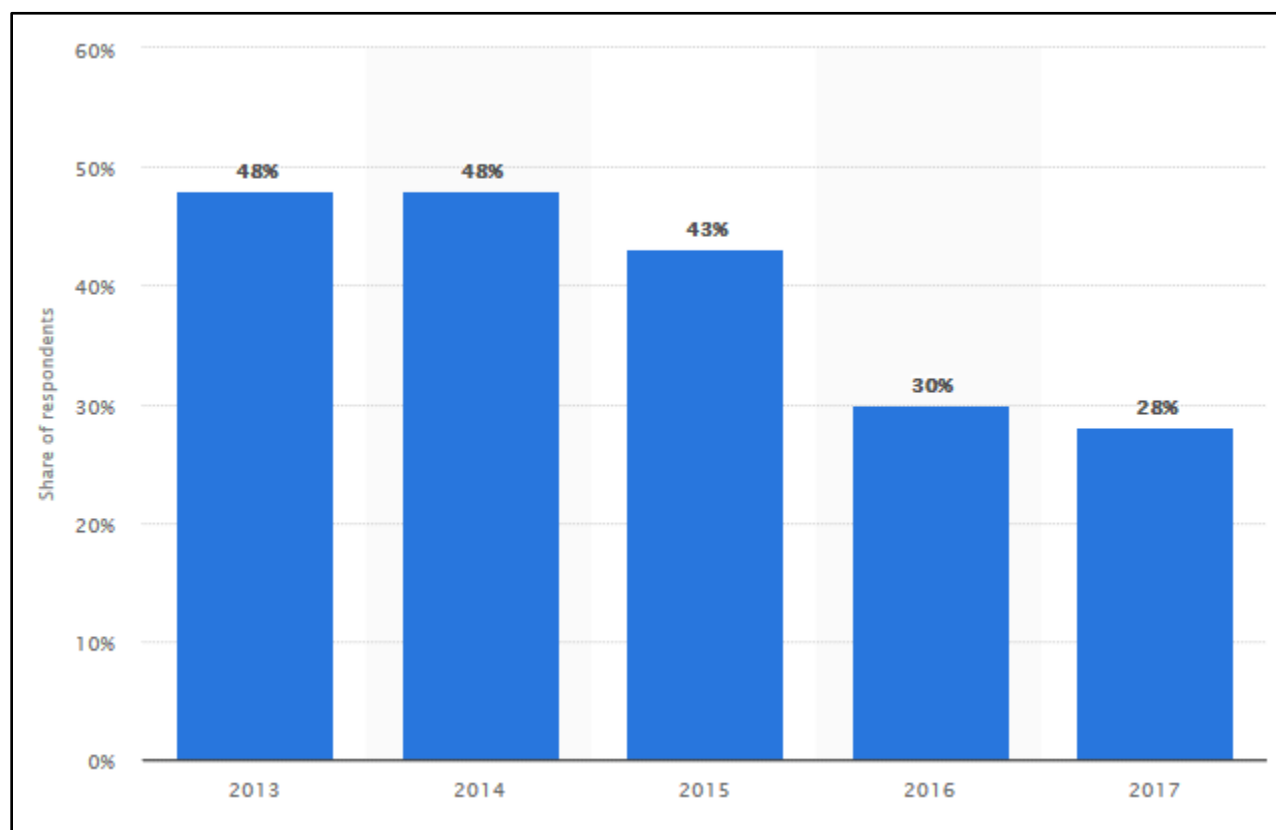
### Number of Active Wechat Messenger Accounts 2015-2018



WeChat active accounts from the third quarter of 2013 to the second quarter of 2018. In the most recently reported quarter, WeChat had 1,057.7 million monthly active users in Q2'18 up from 650 million Q3'16.

Launched in 2011, WeChat is a mobile messaging app developed in China by the company Tencent. In China, WeChat is called and marketed as Weixin. It was rebranded as WeChat in 2012, for international audiences. In 2016, WeChat had 889 million users, a significant increase from the previous year, had about 697 million users in the corresponding quarter. WeChat continues to grow and is one of the essential social networks worldwide, ranking fifth by active social users with 1.05 billion users estimated for 2018.

### Share of Twitter users amongst internet users in MENA from 2013-2017



The statistic describes the share of Twitter users amongst all internet users in the Middle East and North Africa from 2013 to 2017. During 2017, the share of internet users in the Middle East and North Africa who use Twitter was about 28 per cent, down from 48 per cent in 2013. (Harris Poll, 2017)

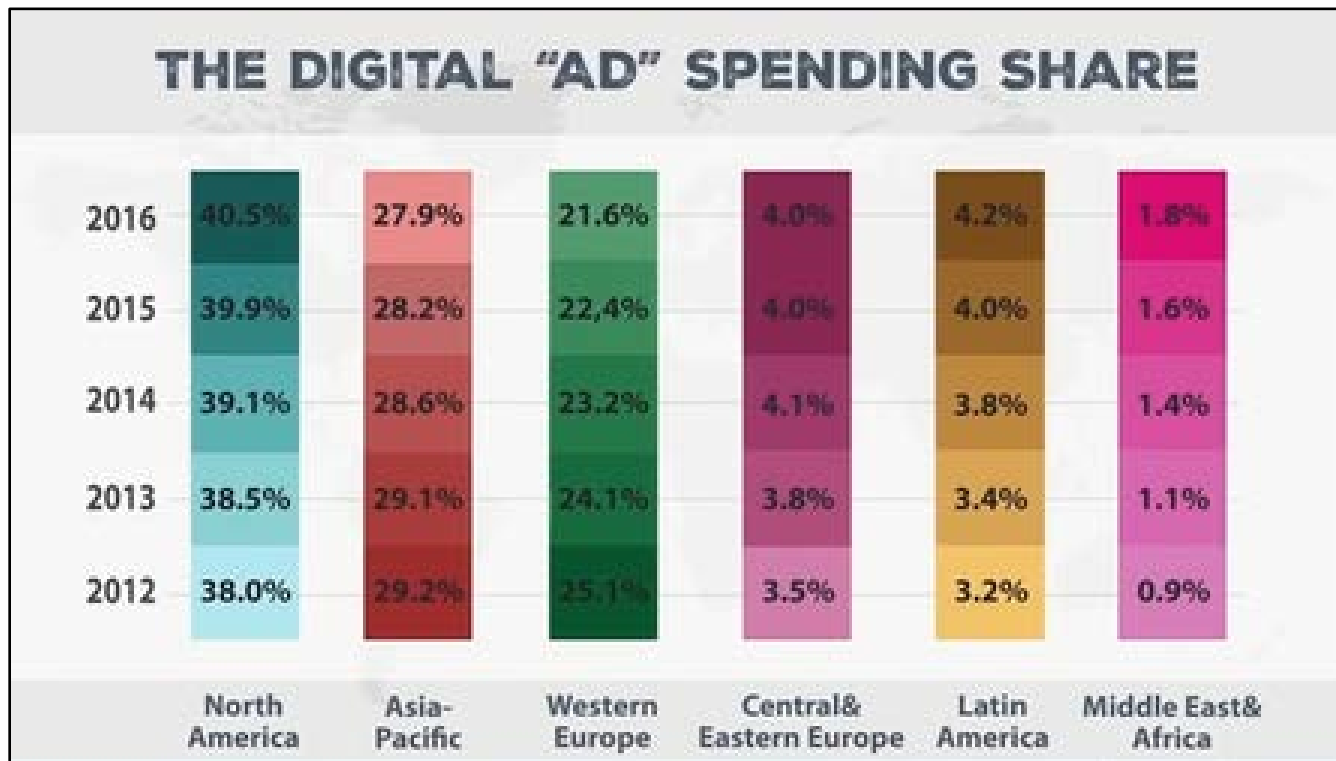
### Top Marketing Priorities for 2018 by Geography



While all regions focus on converting leads into customers, marketers in Australia and New Zealand (ANZ), Europe, the Middle East, and Africa (EMEA) are slightly more concerned with growing overall traffic compared to their peers. ROI is less of a sticking point for Latin American marketers, but they are more fixated on upselling their existing customer base. More Asian marketers cite sales enablement as a priority; given that relationship-building is a priority in Asia, it makes sense that marketers want to partner with their salespeople. Likewise, Asia-based marketers focus more on reducing the cost of customer acquisition, likely due to the extra FaceTime traditionally required to close deals in the region. (Social Media Examiner Jan 2018)

## Global Digital Advertising Spend Share

Digital marketing in the Middle East and North Africa region



According to Yousef Tuqan, VP of Brand Marketing at Jumeriah Intn. LLC, who gave a talk at South by Southwest event in 2018 on how brands are connecting with the digital generation of Arabs, in the MENA, people “just love a never-ending conversation, both offline and online”.

# Connected.

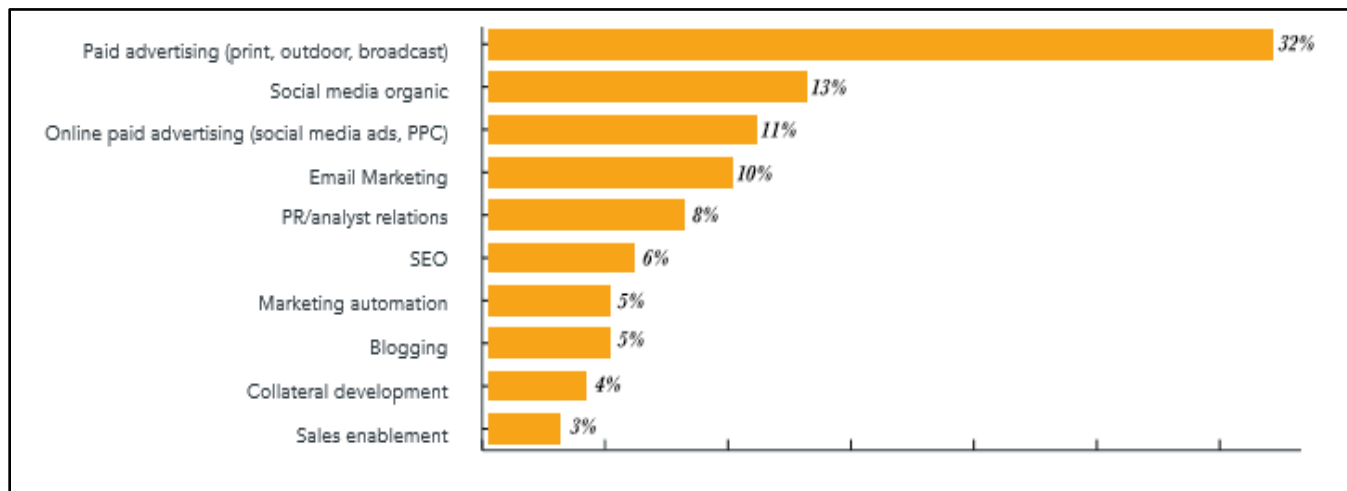
-  • Saudi: Highest Global Penetration
- Region: continued solid growth
-  • 232 million users in MENA, 5x the number in 2012
- Double the average global video consumption.
-  • 510 million video views a day
- Saudi: the highest per capita consumption of YouTube globally.
-  • UAE: 2.6 million active users
- Saudi: 12 million active users
-  • UAE: 920K daily active users
- Saudi: 8.3 million daily active users

Clear take away from the lecture is the enormous population growth, and video consumption is king. (Yousef Tuqan 2018)



### *Traditional Marketing Questioned*

When the question was presented to global marketers, “In your opinion, what is the most overrated marketing tools?” the answers were not surprising. (Social Media Examiner Jan 2018)



One respondent wrote that they are completely abandoning broadcast to focus more on-demand content: “We are abandoning the broadcast channels era to enter an individual on-demand environment, where places and things that surround users will create more useful, relevant, and customized experiences.” (Social Media Examiner Jan 2018)

### What Are Your Company's Top Global Marketing Priorities?

(Social Media Examiner Jan 2018)

<i>Rank</i>	<i>NAM</i>	<i>ANZ</i>	<i>ASIA</i>	<i>LATAM</i>	<i>EMEA</i>
<b>1</b>	Growing SEO/ organic presence 69%	Growing SEO/ organic presence 65%	Growing SEO/ organic presence 61%	Growing SEO/ organic presence 56%	Growing SEO/ organic presence 62%
<b>2</b>	Content distribution/ amplification 58%	Blog content creation 58%	Blog content creation 58%	Blog content creation 48%	Blog content creation 55%
<b>3</b>	Blog content creation 57%	Content distribution/ amplification 51%	Content distribution/ amplification 43%	Interactive content creation 45%	Content distribution/ amplification 50%
<b>4</b>	Interactive content creation 38%	Marketing automation 38%	Interactive content creation 42%	Visual content creation 42%	Marketing automation 41%
<b>5</b>	Marketing automation 37%	Long-form/visual content creation 30%	Marketing automation 40%	Marketing automation 40%	Interactive content creation 32%
<b>6</b>	Long-form/visual content creation 35%	Interactive content creation 29%	Visual content creation 39%	Content distribution/ amplification 38%	Long-form/ visual content creation 30%
<b>7</b>	Visual content creation 22%	Visual content creation 29%	Online tools 28%	Online tools 37%	Online tools 25%
<b>8</b>	Webinars 21%	Product how-to videos 27%	Long-form/visual content creation 26%	Product how-to videos 27%	Product how-to videos 24%
<b>9</b>	Online tools 21%	Online tools 22%	Product how-to videos 26%	Long-form/ visual content creation 24%	Visual content creation 22%
<b>10</b>	Product how- to videos 16%	Webinars 13%	Webinars 22%	Webinars 16%	Webinars 21%

Across geographies, there is much more variance on marketing priorities. Uniformly, SEO and organic growth are at the top of the list in every region, but priorities then shift among content distribution and amplification, blog content creation, interactive content creation, and marketing automation. Latin American marketers focus more on interactive and visual content compared to others. North American marketers are tinkering with ways to distribute their content. (Social Media Examiner Jan 2018)

Globally, challenges are consistent, with Asian marketers citing targeted content for international audiences and hiring top talent as strong challenges. Latin American marketers are slightly more focused on finding the right technology solutions for their teams and training. (Social Media Examiner Jan 2018)

### ***What Are Your Company's Top Marketing Challenges? (By Geography)***

(Social Media Examiner Jan 2018)

<b>Rank</b>	<b>NAM</b>	<b>ANZ</b>	<b>ASIA</b>	<b>LATAM</b>	<b>EMEA</b>
<b>1</b>	Generating traffic and leads 61%	Generating traffic and leads 62%	Generating traffic and leads 59%	Generating traffic and leads 66%	Generating traffic and leads 62%
<b>2</b>	Proving the ROI of our marketing activities 45%	Proving the ROI of our marketing activities 44%	Proving the ROI of our marketing activities 39%	Proving the ROI of our marketing activities 37%	Proving the ROI of our marketing activities 40%
<b>3</b>	Securing enough budget 30%	Securing enough budget 26%	Targeting content for an international audience 37%	Identifying the right technologies for our needs 32%	Managing our website 27%
<b>4</b>	Identifying the right technologies for our needs 24%	Managing our website 24%	Securing enough budget 29%	Securing enough budget 29%	Securing enough budget 25%
<b>5</b>	Managing our website 20%	Identifying the right technologies for our needs 23%	Identifying the right technologies for our needs 26%	Managing our website 28%	Targeting content for an international audience 23%



<i>Rank</i>	<i>NAM</i>	<i>ANZ</i>	<i>ASIA</i>	<i>LATAM</i>	<i>EMEA</i>
<b>6</b>	Training our team 13%	Targeting content for an international audience 12%	Managing our website 26%	Training our team 26%	Identifying the right technologies for our needs 22%
<b>7</b>	Hiring top talent 13%	Training our team 11%	Training our team 20%	Targeting content for an international audience 19%	Training our team 18%
<b>8</b>	Targeting content for an international audience 11%	Hiring top talent 10%	Hiring top talent 20%	Hiring top talent 18%	Hiring top talent 14%
<b>9</b>	Finding an executive sponsor 5%	Finding an executive sponsor 2%	Finding an executive sponsor 11%	Finding an executive sponsor 10%	Finding an executive sponsor 5%

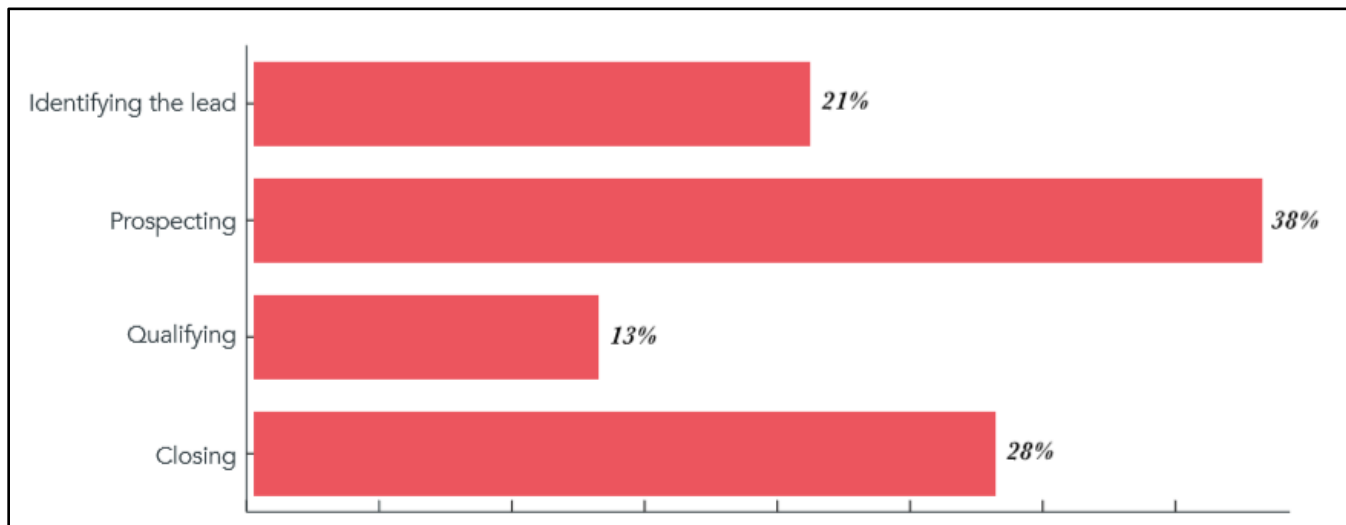
Across regions, there is variance in the pressure points for marketing salespeople. While in North America, salespeople have a tough time connecting on the phone, Australia and New Zealand-based salespeople have a hard time avoiding discounting, and Asian and Latin American salespeople struggle with closing deals.

*Sales Marketing Difficulties Compared to 2 to 3 Years Ago By Geography (Social Media Examiner, Jan 2018)*

<i>Rank</i>	<i>NAM</i>	<i>ANZ</i>	<i>ASIA</i>	<i>LATAM</i>	<i>EMEA</i>
<b>1</b>	Getting a response from prospects 49%	Getting a response from prospects 49%	Closing deals 37%	Closing deals 42%	Getting a response from prospects 34%
<b>2</b>	Connecting via phone 36%	Avoiding discounting/negotiation 36%	Getting a response from prospects 36%	Getting a response from prospects 35%	Identifying/prospecting good leads 30%
<b>3</b>	Engaging multiple decision makers at a company 36%	Identifying/prospecting good leads 26%	Avoiding discounting/negotiation 27%	Identifying/prospecting good leads 33%	Closing deals 30%
<b>4</b>	Identifying/prospecting good leads 30%	Engaging multiple decision makers at a company 23%	Engaging multiple decision makers at a company 26%	Engaging multiple decision makers at a company 28%	Avoiding discounting/negotiation 30%
<b>5</b>	Closing deals 26%	Closing deals 19%	Identifying/prospecting good leads 24%	Avoiding discounting/negotiation 23%	Connecting via phone 25%

<i>Rank</i>	<i>NAM</i>	<i>ANZ</i>	<i>ASIA</i>	<i>LATAM</i>	<i>EMEA</i>
<b>6</b>	Connecting via email 20%	Connecting via phone 17%	Sourcing referrals 21%	Incorporating social media into the sales process 22%	Connecting via email 25%
<b>7</b>	Avoiding discounting/negotiation 18%	Incorporating social media into the sales process 17%	Incorporating social media into the sales process 18%	Using sales technologies 19%	Engaging multiple decision makers at a company 23%
<b>8</b>	Keeping someone on the phone 12%	Sourcing referrals 17%	Connecting via email 14%	Delivering a presentation 17%	Incorporating social media into the sales process 18%
<b>9</b>	Incorporating social media into the sales process 12%	Connecting via email 15%	Connecting via phone 13%	Doing research before initial call/email 16%	Keeping someone on the phone 15%
<b>10</b>	Using sales technologies 11%	Keeping someone on the phone 8%	Keeping someone on the phone 12%	Connecting via phone 15%	Sourcing referrals 13%
<b>11</b>	Sourcing referrals 8%	Doing research before initial call/email 4%	Using sales technologies 10%	Connecting via email 14%	Using sales technologies 9%
<b>12</b>	Doing research before initial call/email 8%	Using sales technologies 2%	Doing research before initial call/email 10%	Keeping someone on the phone 9%	Delivering a presentation 6%

*What Part of the Sales and Marketing Process Do Reps Struggle with Most? (Social Media Examiner, Jan 2018)*

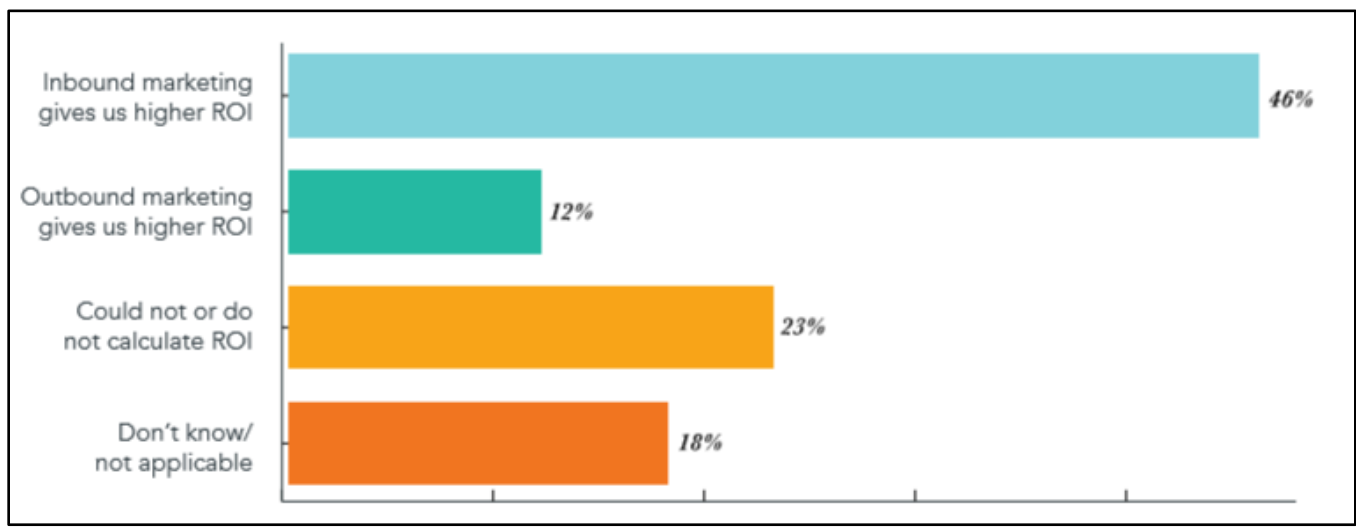


*The Marketing Business*

Marketing respondents found that inbound campaigns yielded higher ROI compared to outbound campaigns, yet 41 per cent of respondents either could not answer the question or could not calculate ROI. The inability to measure ROI is a hindrance for marketing teams trying to prove their value or advocate for higher budgets.

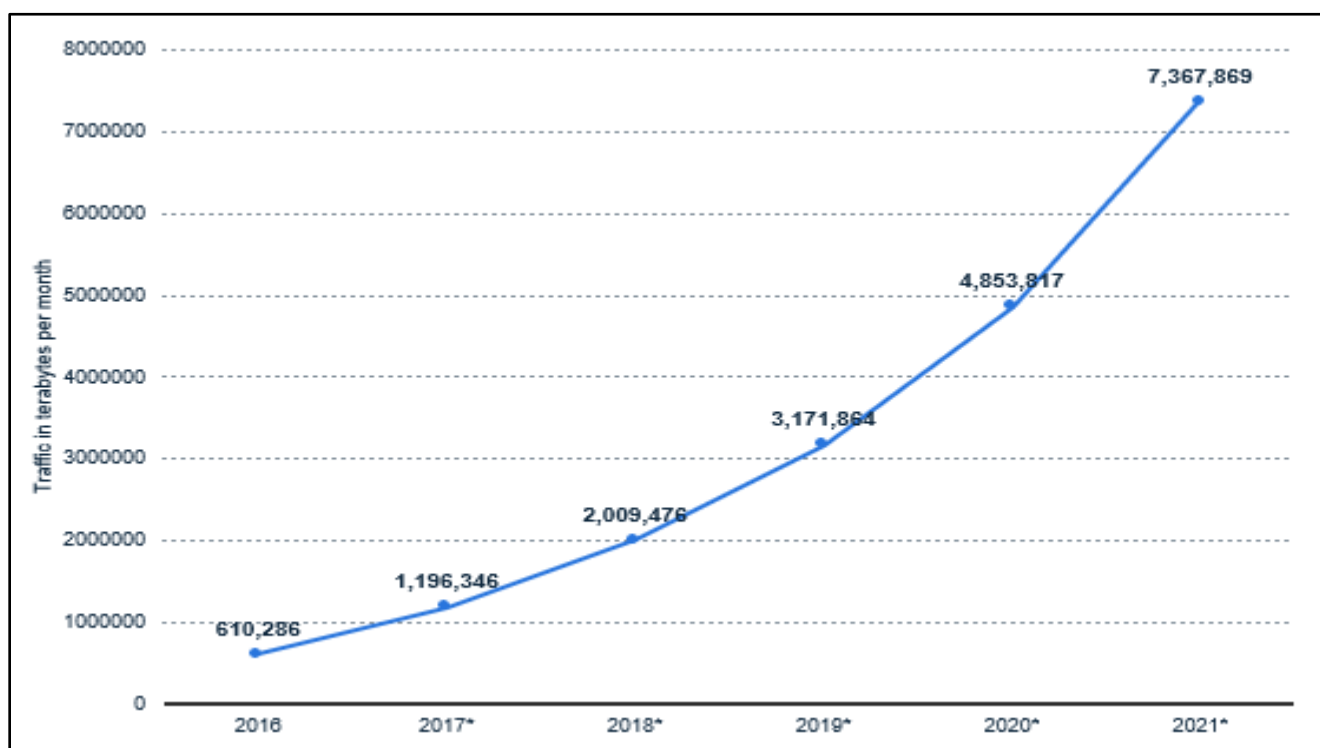


*Which Marketing Approach Has Given Your Organization Higher ROI: Inbound Or Outbound Marketing?*



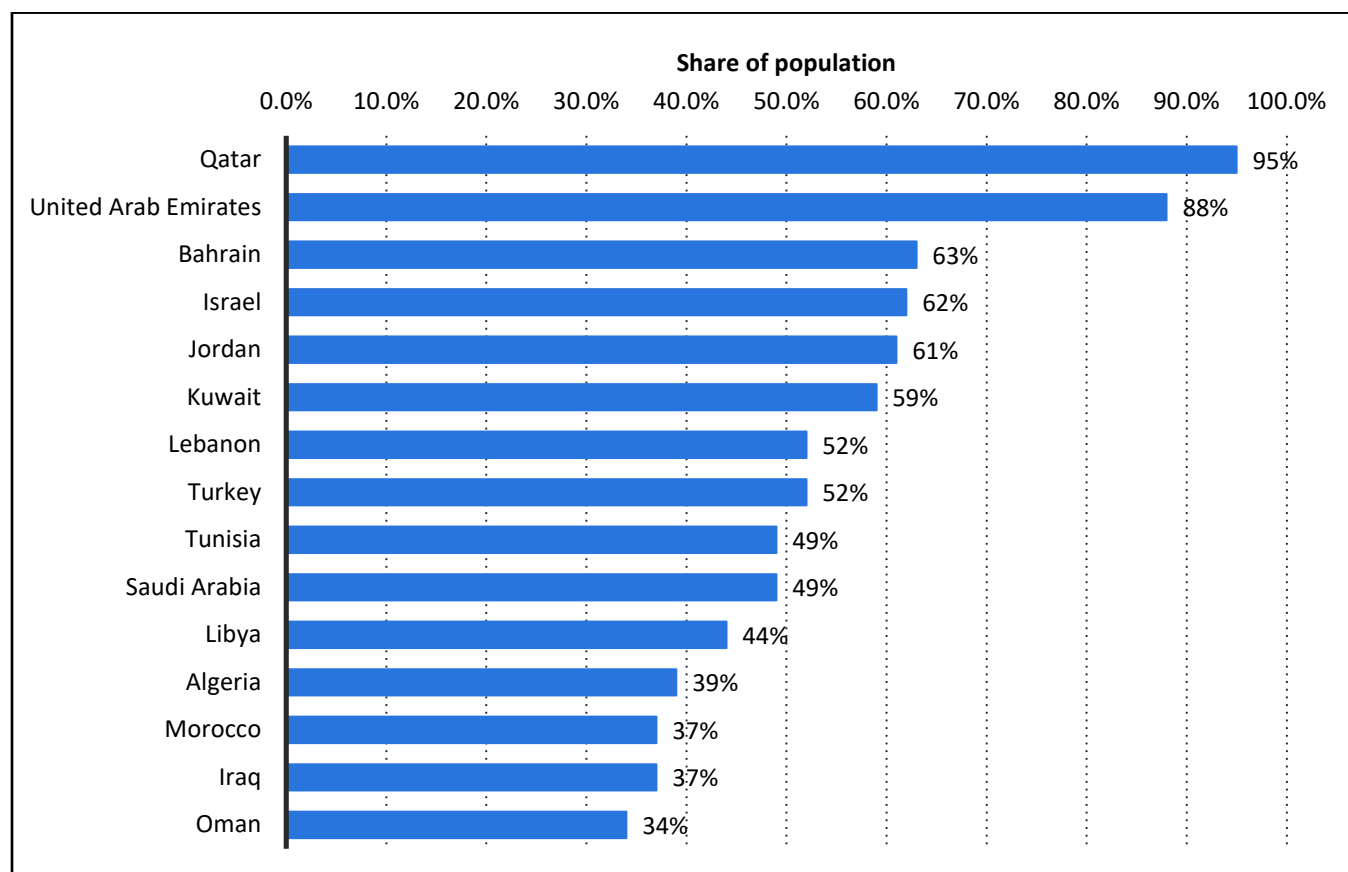
### *Key to MENA Marketing Success: Communication (Smartphones)*

The mobile data traffic in the Middle East and Africa in 2016 with projections until 2021. In 2016, mobile data traffic in the Middle East and Africa amounted to 610,286 terabytes per month. In 2020, regional traffic from mobile devices such as smartphones, laptops, tablets, M2M connections, and non-smartphones is projected to reach 4,853,817 terabytes per month. The projected compound annual growth rate (CAGR) amounts to 65 per cent.



The Middle East and Africa: Mobile data traffic 2016-2021 (Source: Cisco Systems; [ID 292872](#))

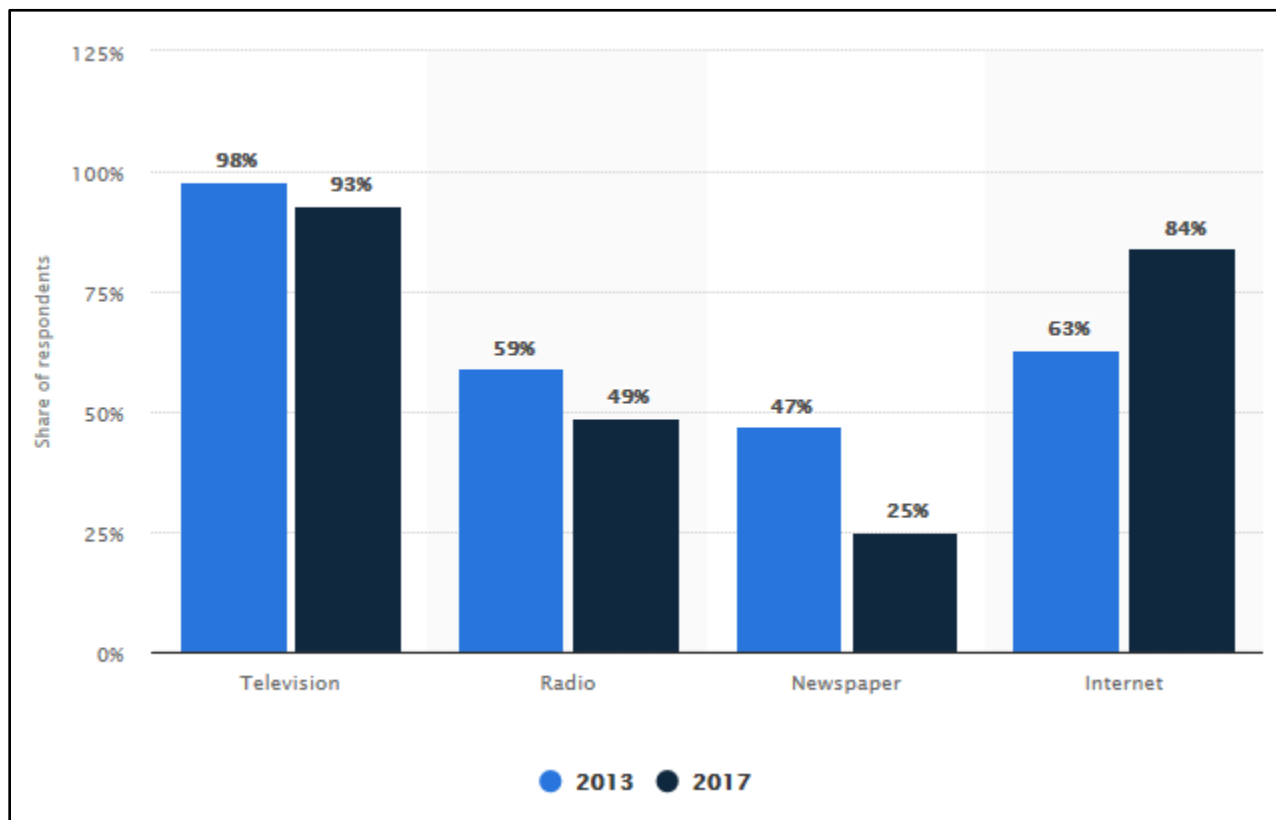
### *Active Mobile Social Media Penetration in MENA Countries 2017*



Active mobile social media penetration in MENA countries 2017 (Source: US Census Bureau; Facebook; ID 309671)

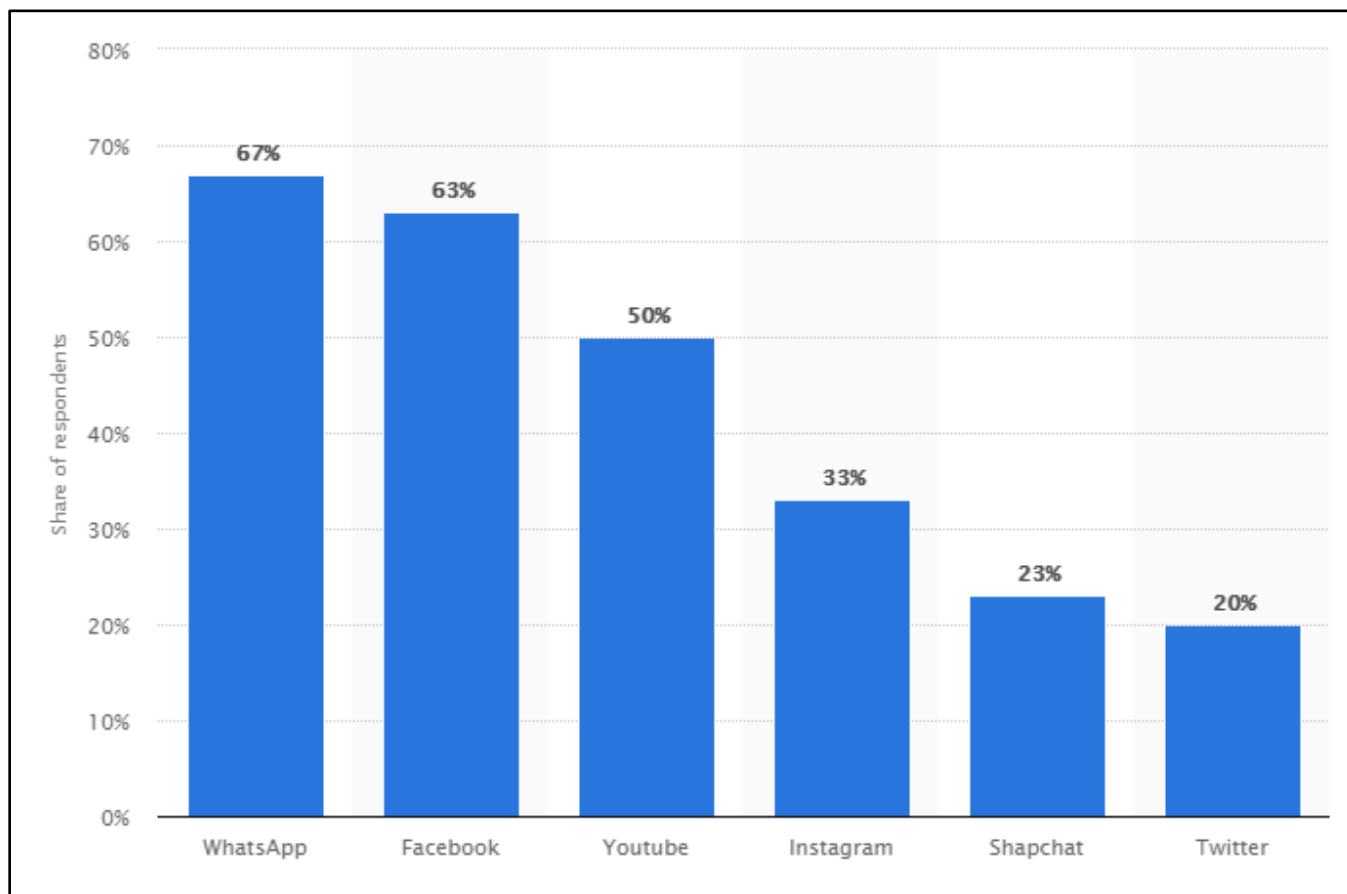
This statistic shows the active mobile social media penetration in MENA countries in as of January 2017. During that month, 95 percent of the population in Qatar were monthly active mobile social media users, logging on to social media services at least once per month. (US Census Bureau, 2017)

### *Share of Respondents Using Media in MENA by Medium 2013-2017*



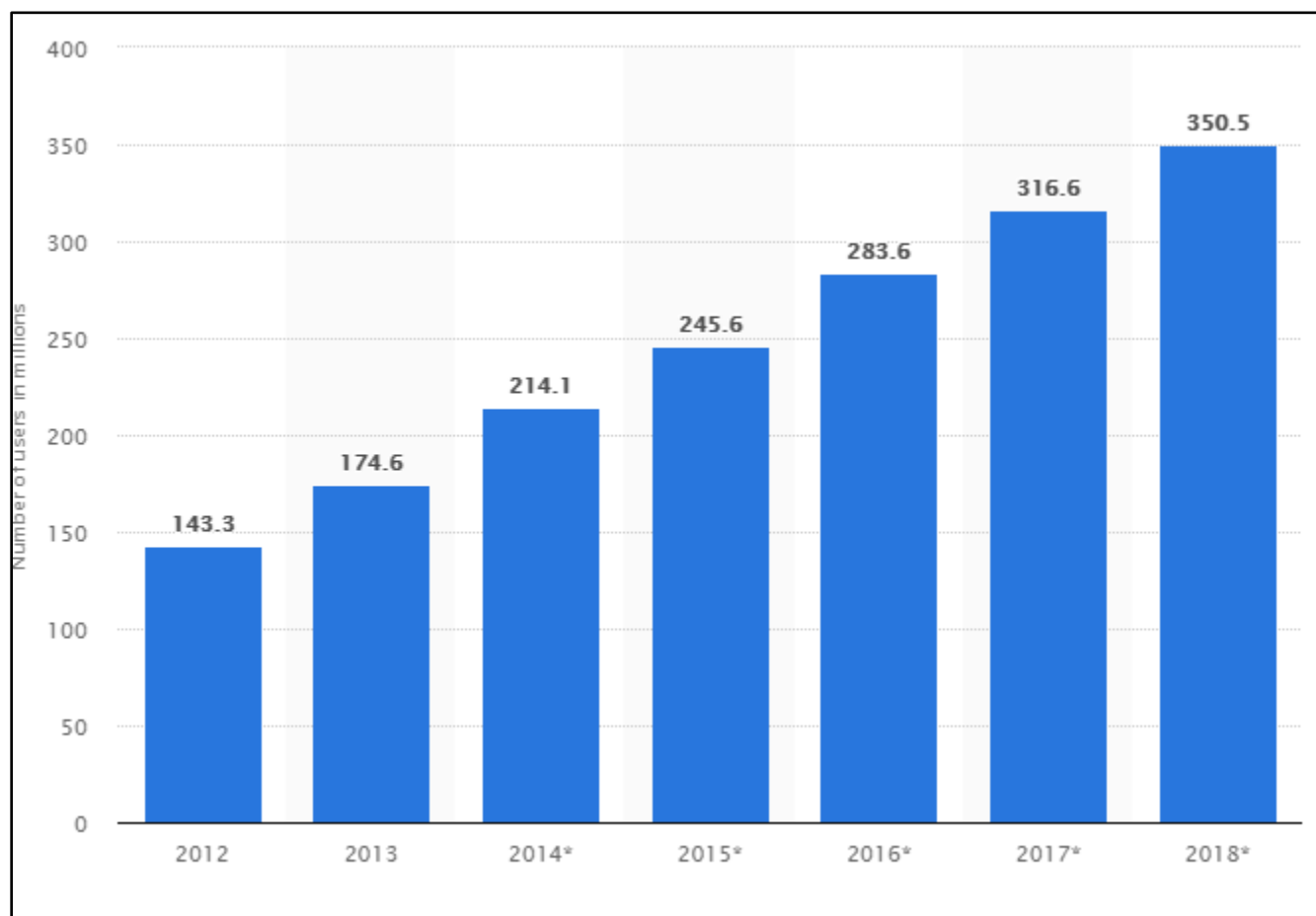
This poll shows the share of nationals that use various forms of media in the Middle East and North Africa in 2013 and 2017, by the medium. The usage of television dropped in the Middle East and North Africa from 98 per cent of respondents in 2013 to 93 per cent in 2017. (Harris Poll, Mar 2017)

### *Share of Users on Social Media in MNEA by Platform 2017*



The study describes the share of respondents who use social media in the Middle East and North Africa as of March 2017, by platform. During the survey period, 67 per cent of national respondents in the Middle East and North Africa stated that they used WhatsApp followed by 63 per cent. (Harris Poll Mar 2017)

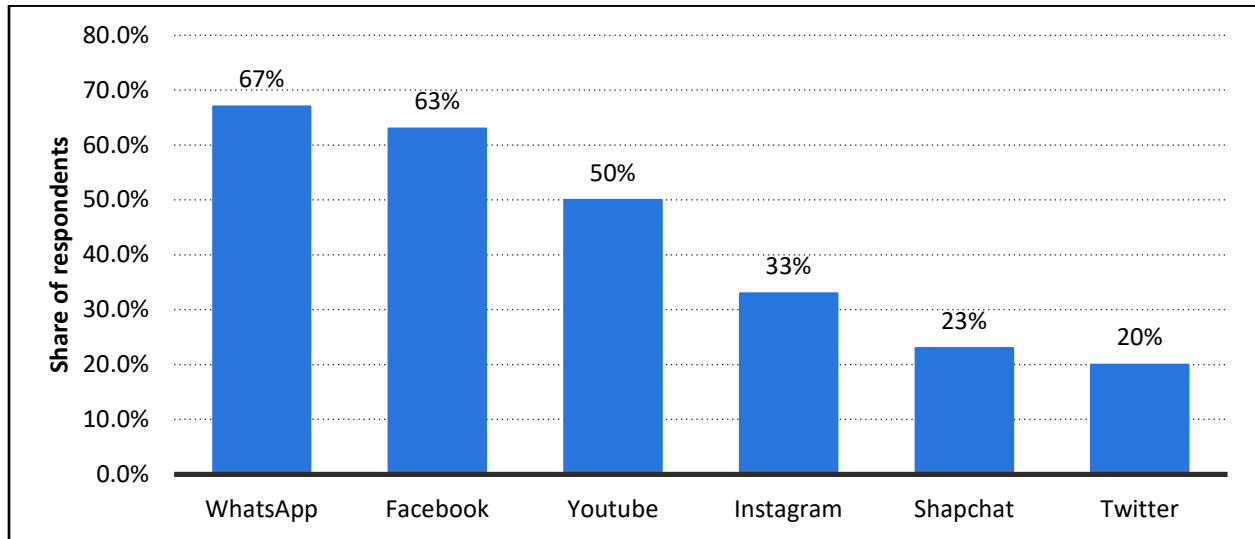
*Number of Social Network Users in MENA from 2012 to 2018 (In Millions)*



This statistic shows the number of social network users in the Middle East and Africa from 2012 to 2018. In 2018, the number of social network users in the Middle East and Africa is expected to reach 350.5 million, a 207.2 million increase over six years. (eMarketer, 2014)

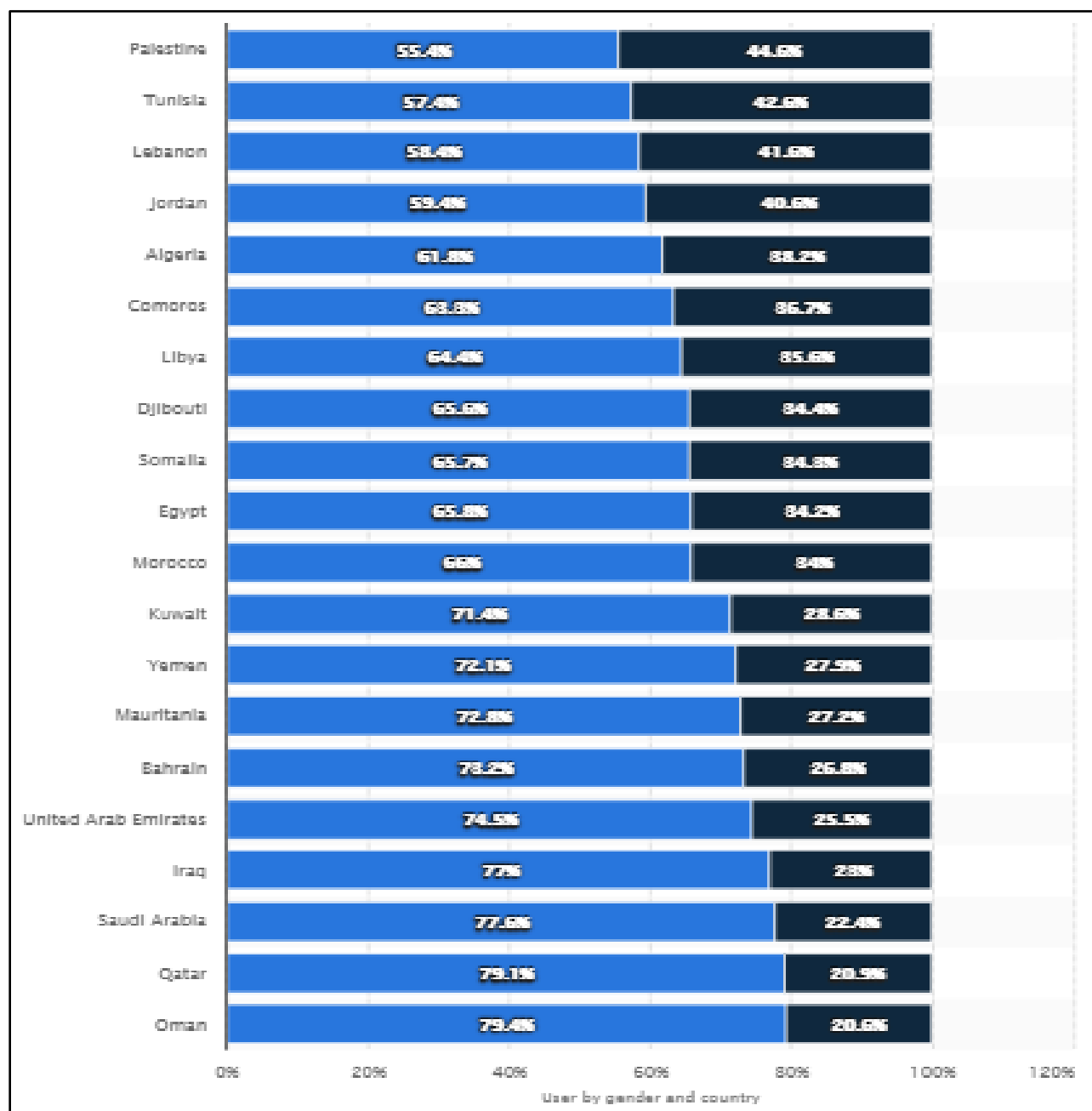
***Social Media MENA***

As of March 2017, the share of respondents who use social media in the Middle East and North Africa was shifting. 67 per cent of national respondents in the Middle East and North Africa stated that they used WhatsApp.



The share of users on social media in MENA by platform (Source: Harris Poll, 2017)

*Share of Facebook Users in the MENA in 2017, by Gender and Country*

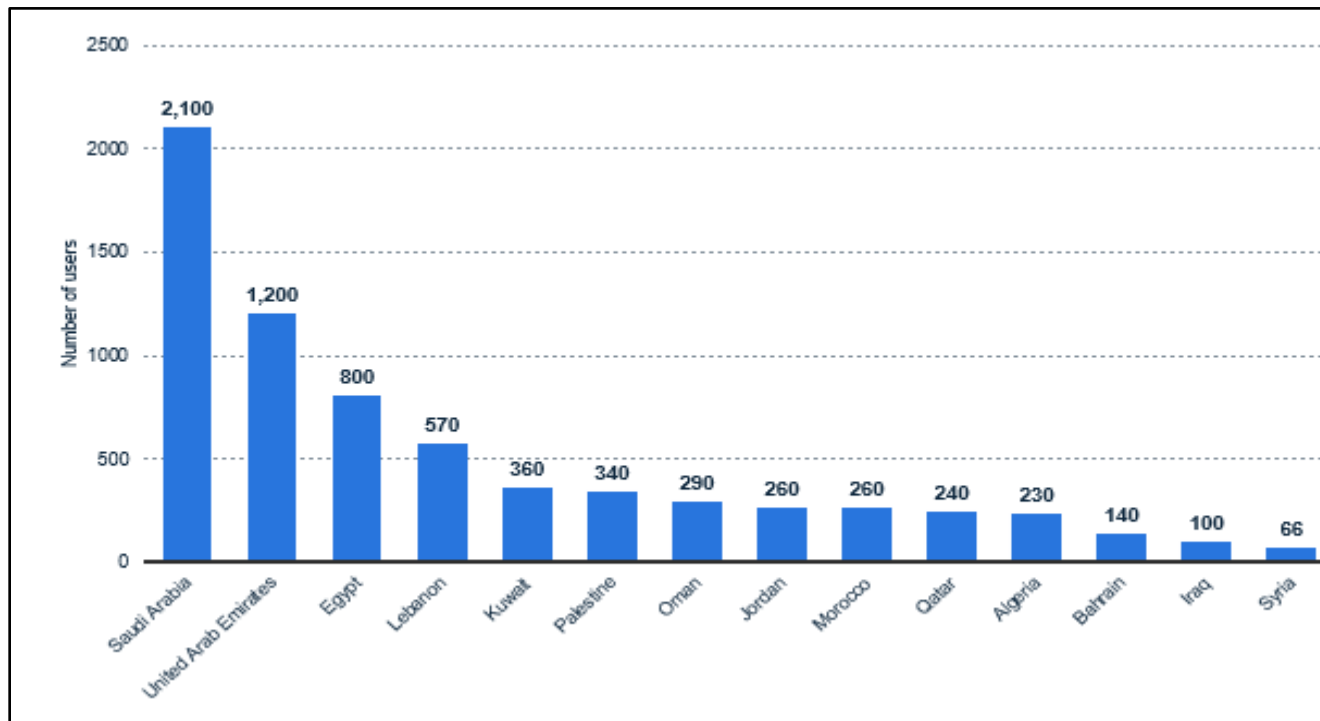


This statistic described the distribution of Facebook user in the Middle East and North Africa in 2017, broken down by gender in each country. In 2017, the share of female Facebook users in Palestine was 55.4 per cent. (Arab Social Media Report, 2017 pg29)





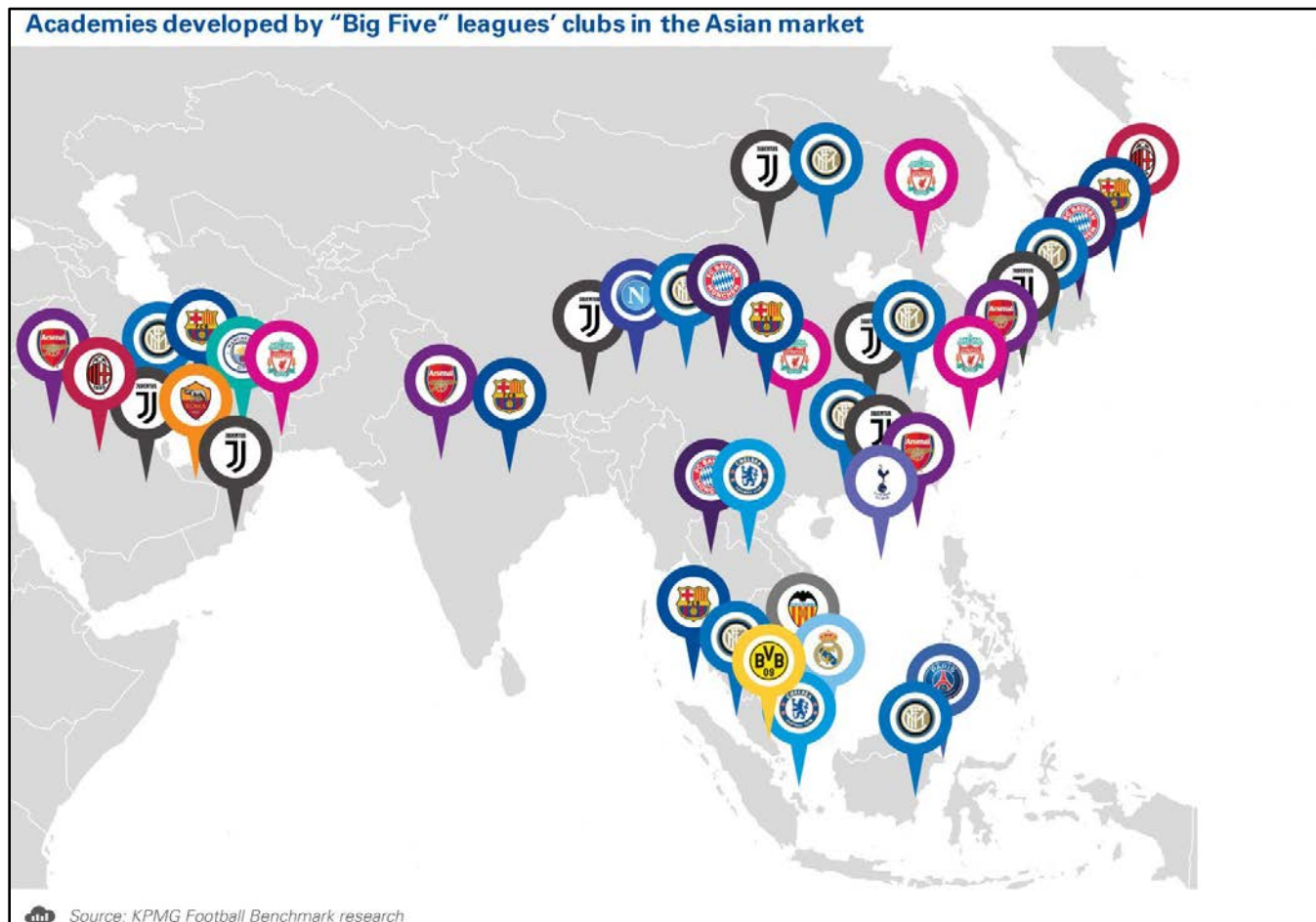
*Number of Instagram Users in the MENA in 2016, By Country (In Thousand)*



This statistic described the number of Instagram user in the MENA in 2016, by country. During 2016, the number of Instagram users in Saudi Arabia was about 2.1 million. (Arab Social Media Report, 2017, pg59)

### *Business Future for Global Marketing*

Brand awareness: Increasing football brand awareness is fundamental in order to create new sports business opportunities.



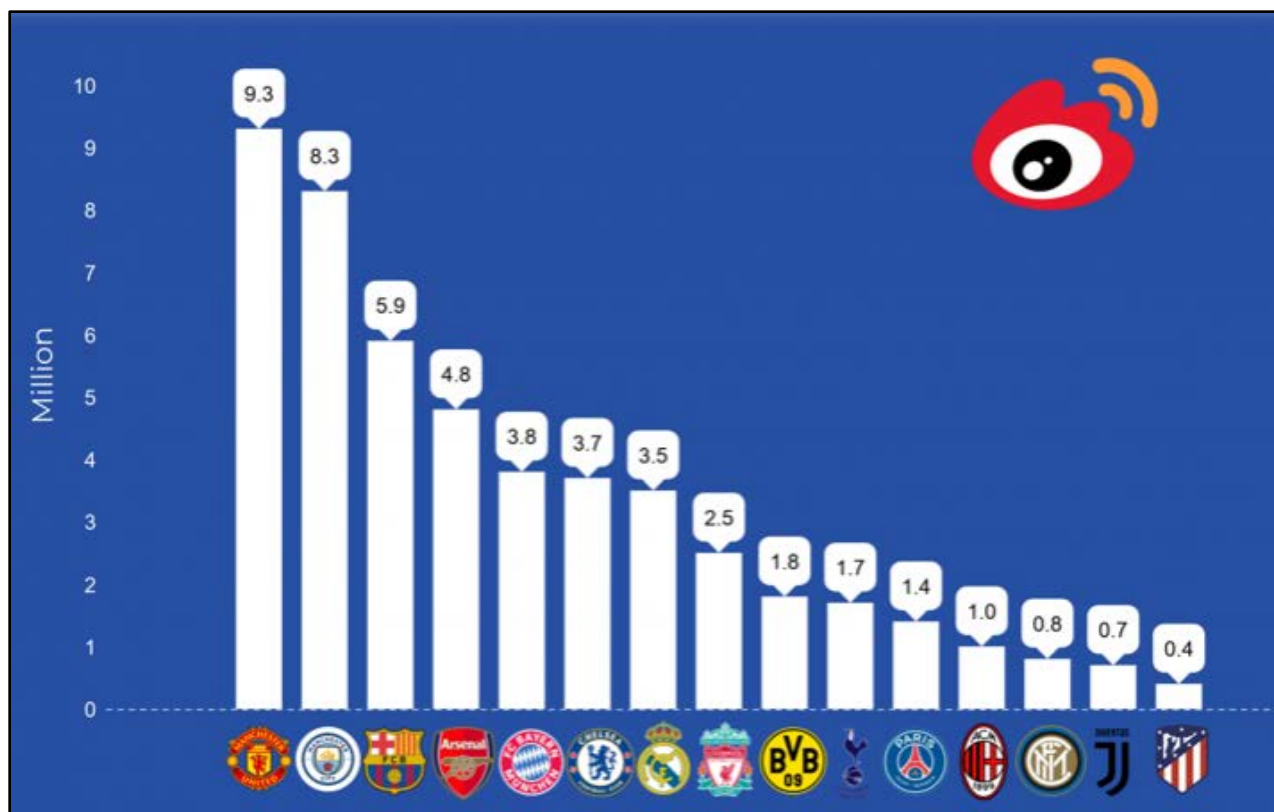
A growing number of clubs has already exploited their chances to penetrate Europe and North America. On the other hand, Asia represents an uncharted market of more than 4 billion people, which is to say almost 60 per cent of the worldwide population. (KPMG, 2018)

Video: Video is one of the strongest deliveries for marketing and a great channel to better connect with a prospect, while others fret that video will make their day jobs obsolete.

Market researcher sees the video as the connecting force between a brand and their customers for the future. The evolution away from traditional “one-size-fits-all” makes video stronger to introduce regional messages with global brand message overtones.

Agreements with local sponsors: Many traditional top clubs, brands, sports product, and services have struck regional partnerships in Asia, India, Europe, MEDA and North America in recent years. Regional partnerships, unlike global ones, allow sports business to target a specific market, through a well-known brand in that particular region. Additionally, opening stores and franchising raises international awareness of the sports brands and increases brand images. (KPMG, 2018)

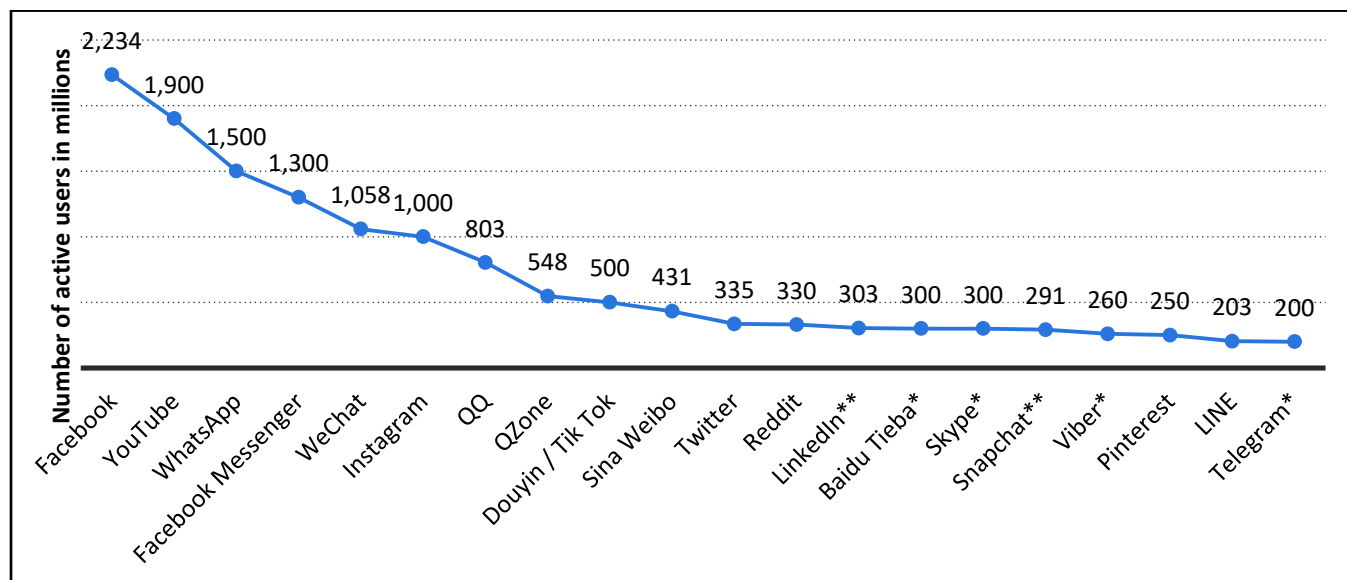
Social Media Expansion: “Social media’s omnipresence in today’s world is undeniable: it has not only changed the way people interact, but also opened up new opportunities for businesses in targeting customers, and in a football (sports) context, this means fans.” (KPMG, 2018)



Top 15 most followed clubs on Weibo (KPMG, 2018)

AI and VR: Artificial intelligence, augmented reality, and virtual reality are all buzzwords in the technology and marketing community. This is happening now with content written by AI software. We are seeing AI-generated content today by the increasing news articles outlining sports statistics and earning AI programs write reports. “China’s state news agency Xinhua introduced the newest members of its newsroom: AI anchors who will report “tirelessly” all day every day, from anywhere in the country.” The first 24/7 AI virtual newscaster talks and animates a real person while the content is typed and then spoken. (The Guardian, 2018) Since the technologies are not pervasively available and have so many potential use cases, there’s not much clarity around what impact AI will have shortly and how marketers should prepare or adjust their approach.

*Social Networks Worldwide As Of October 2018, Ranked By Active Users (In Millions)*



This statistic provides information on the most popular networks worldwide as of October 2018, ranked by some active accounts. The market leader Facebook was the first social network to surpass 1 billion registered accounts (2014) and currently sits at 2.23 billion monthly active users (We Are Social; Kepios, October 2018). Sixth-ranked photo-sharing app Instagram hit 1 billion monthly active accounts this year (2018), both owned by Facebook. (Business Insider 2018)

The leading social networks are usually available in multiple languages and enable users to connect with friends or people across geographical, political or economic borders. Approximately 2 billion internet users are using social networks (eMarketer, 2017) and these figures are still expected to grow as mobile device usage increasingly gain traction. Data and hardware plans continue becoming even cheaper, and the number of users is estimated to hit 3.8 billion by 2021. As for the number of active smartphones across the globe, there will be 3.3 billion by the end of 2018. (Newzoo, Oct 2018)

### *Social Networking*

“Due to a constant presence in the lives of their users, social networks have a decidedly strong social impact. The blurring between offline and virtual life as well as the concept of digital identity and online social interactions are some of the aspects that have emerged in recent discussions.” (We Are Social; Kepios 2018)

## DISCUSSION QUESTIONS:

- 1) With the growth in digital versus traditional marketing, where should resources be placed for the most robust ROI in MENA over the next few years?
- 2) Why are smartphones the key to sports marketing?
- 3) What are social media types important in MENA?
- 4) Why is the understanding of social media essential for global sports marketing opportunities? (For regional? for local?)

## METHOD

Global and MENA current (primarily 2017-2018) research, polls, analysis, comparisons, and interviews with references listed below.

## DEFINITIONS:

**AI:** Artificial intelligence, sometimes called machine intelligence, is intelligence demonstrated by machines, in contrast to the natural intelligence displayed by humans and other animals.

**Digital Marketing:** Digital marketing is the marketing of products or services using digital technologies, mainly on the Internet, but also including mobile phones, display advertising, and any other digital medium.

**Inbound Marketing:** Inbound marketing is a marketing methodology that is designed to draw visitors and potential customers in, rather than outwardly pushing a brand, product or service onto prospects in the hope of generating leads or customers.

**Outbound Marketing:** Outbound marketing is a traditional method of marketing seeking to obstruct potential customers. Outbound marketing includes activities such as trade shows, seminar series and cold calling. It is costly, and the ROI is much lower than inbound marketing.

**ROI:** Return on investment is a ratio between the net profit and cost of investment resulting from an investment of some resources. A high ROI means the investment's gains favorably to its cost.

**SEO:** Search engine optimization is the process of affecting the online visibility of a website or a web page in a web search engine's unpaid results—often referred to as "natural", "organic", or "earned" results.

**Smartphone:** A device with a screen size under 7 inches and an advance operating system.

**Smartphone device used:** The total number of smartphone devices used at least once a month by smartphone users.

**Smartphone user:** An individual who possesses his/her own smartphone and uses at least once a month.

**Social Media:** Interactive computer-mediated technologies that facilitate the creation and sharing of information, ideas, career interests and other forms of expression via virtual communities and networks.

**Tablet:** A device with a screen size of 7 inches or larger and an advance operating system.

**Traditional Marketing:** refers to the conventional methods of marketing used ever since the concept of advertisements or marketing came into existence. This primarily includes the following modes for brand promotion like newspaper, magazines, radio, television, and billboards.

**VR:** Virtual Reality is computer-generated simulation of a three-dimensional image or environment that can be interacted with in a seemingly real or physical way by a person using special electronic equipment, such as a helmet with a screen inside or gloves fitted with sensors.








MENA: The Middle East and North Africa region (MENA) including (and not limited to) Algeria, Bahrain, Egypt, Jordan, Lebanon, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, United Arab Emirates, and Yemen.








## GLOBAL MARKETING COMMUNICATION

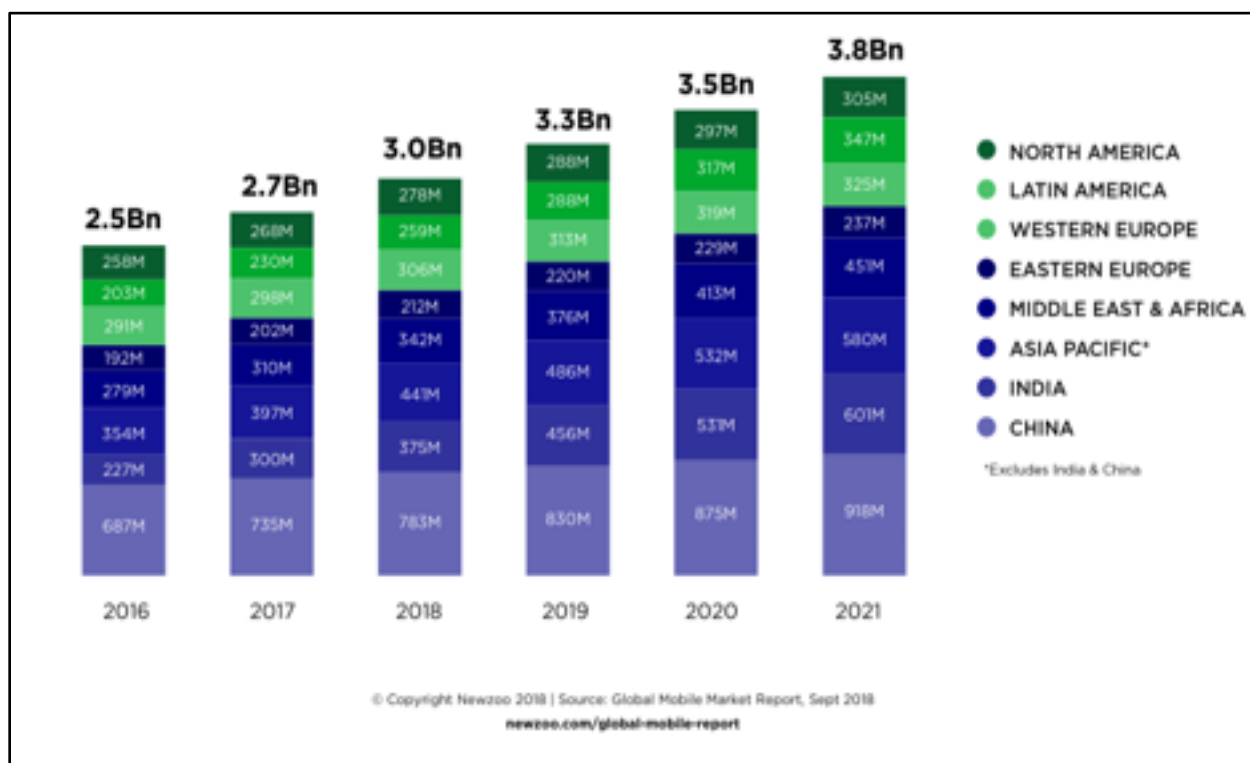
Top Five countries/population smartphone users in 2018. (Source: Newzoo, Oct 2018)

RANK	IMAGE	COUNTRY	TOTAL POPULATION ▾	SMARTPHONE PENETRATION	SMARTPHONE USERS
1		China	1,415,046,000	55.3%	782,848,000
2		India	1,354,052,000	27.7%	374,893,000
3		United States	326,767,000	77.0%	251,688,000
6		Indonesia	266,795,000	27.4%	73,155,000
5		Brazil	210,868,000	41.3%	87,172,000

Top Five countries/smartphone users in 2018. (Source: Newzoo, Oct 2018)

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3		United States	326,767,000	77.0%	251,688,000
4		Russian Federation	143,965,000	63.8%	91,865,000
5		Brazil	210,868,000	41.3%	87,172,000

Active smartphone users per global regions 2016-2021 (Source: Newzoo, Sept 2018)



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