State of Digital Advertising in MENA Study

Summary of Findings

Prepared for:

April 2025

Altman Solon and IAB's State of Digital Advertising in MENA Study explores and compares investment *rationales* of MENA-based digital ad buyers and sellers

Study's objectives

The Study explores how ad buyers and sellers are investing in MENA digital advertising through:

1. **Enhancing digital ad offerings** from sellers
2. **Investing in revenue-generating priorities** for emerging ad products and services impacting *working media*
3. **Evolving buy side appetite and rationale for spend decisions** on emerging ad formats and channels via education
4. Improving accuracy of expectations for **revenue growth and challenge mitigation** within the MENA digital ad ecosystem

Themes for exploration

Buyer Education	Most significant gaps to buyer understanding and trust for investment in MENA ad ecosystem
Data Transparency	Appetite and impact of enhanced sharing of data between ad sellers and ad buyers
Digital Channel Mix Expansion	Growth potential of CTV, Digital Audio and DOOH as part of the ad buyer media mix
APAC Demand for MENA Ad Inventory	Potential for demand capture from APAC (Chinese and Indian) ad buyers for MENA ad inventory

Source: Altman Solon

We captured sentiment across a diverse range of ad buyers and sellers representing over eight MENA and APAC markets

Study respondents included

		Examples of roles
Buy side	**240+** *marketers*	• CMO • Head of agency • EVP/SVP/VP of marketing
Buy side	**14** *ad agency executives*	• Agency CEOs • Head of agency • Head of media buying • Head of linear/digital TV buying
Sell side	**14** *digital ad sellers*	• Head of advertising • Head of ad strategy • Head of ad product strategy • Chief revenue officers

Ad Buyer Scale & Diversification in Numbers

8	MENA ad-buying markets tested
5	Number of "Big 6" agencies interviewed
11	Number of brand vertical perspectives captured

Interviews conducted with ad buyers and sellers spanned a range of global and regional players

Interviews Conducted

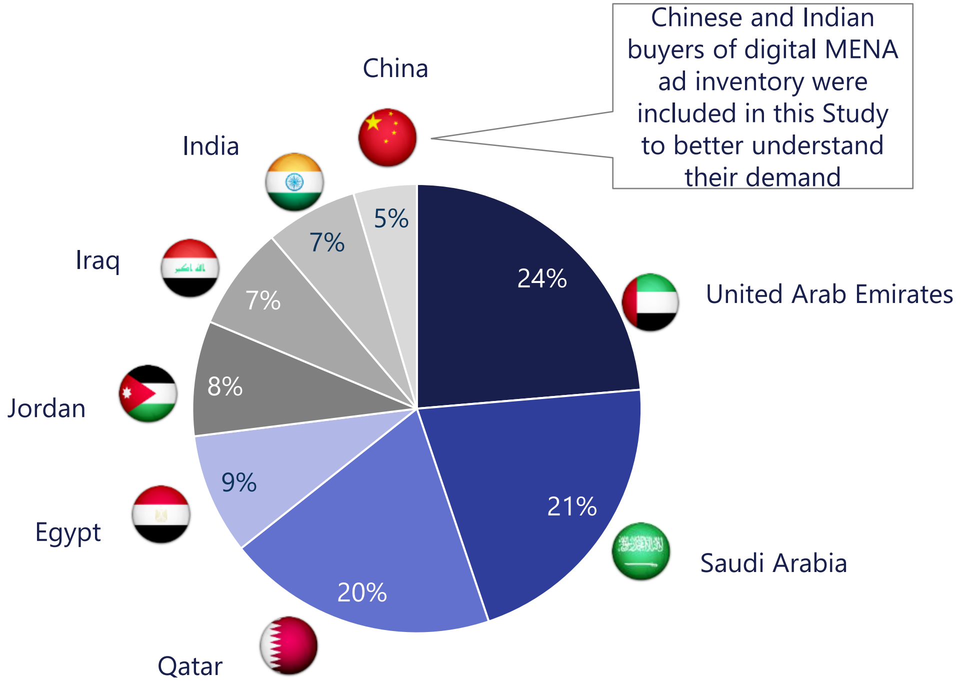
Company Leadership Interviewed

HAVAS
INCUBETA
CHAIN REACTION
PUBLICIS GROUPE
OMG OmnicomMediaGroup
IPG MEDIABRANDS
groupm
osn
The Neuron
amazon
Google
rotana
Choueiri Group
srmg Saudi Research & Media Group
PIKASSO
ZEE
theTradeDesk
ByteDance

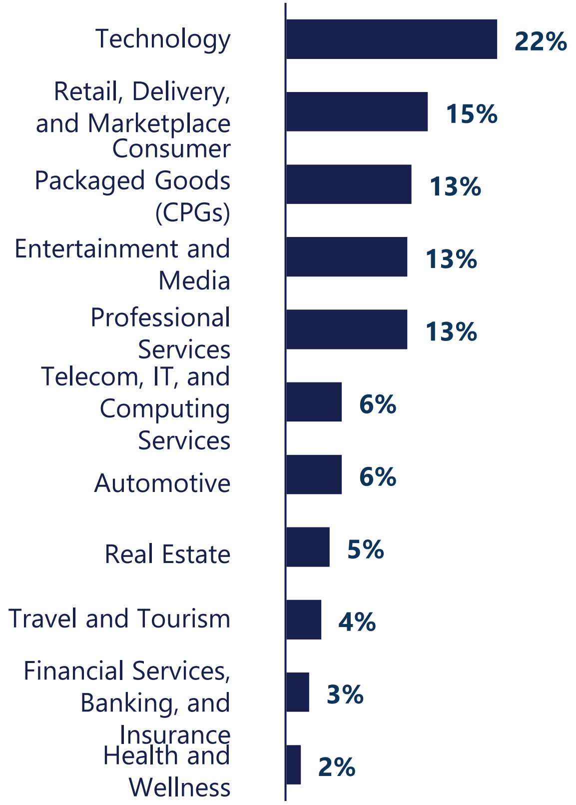
Notes: Flags denote headquarters of regional organizations and geographic focus of interview for global organizations. Unmarked interviews had global focus.

Survey respondents were from a representative sample of companies across target markets, industries and sizes

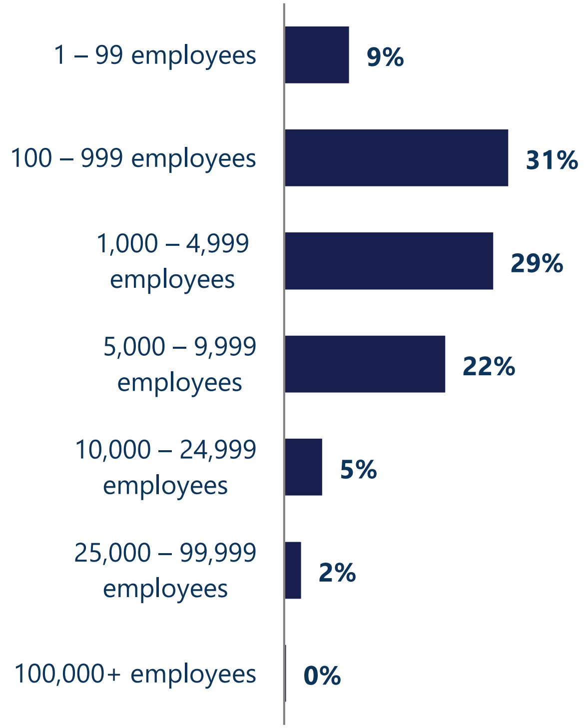
Survey Marketer Respondents by Country
% of respondents, N=241



Marketer Industry
% of Survey Respondents, N= 241



FTE Count by Marketer
% of Respondents, N= 241



Sources: Altman Solon 2025 MENA Ad Buyer Survey

The Study leveraged two sources of quantitative and qualitative data to develop a perspective on MENA market sentiment

Survey Overview

Objective	This survey captured marketer sentiment on: • Willingness to spend on ad channels and products and associated drivers • Digital ad ecosystem challenges and preference for mitigation
Screening Criteria	• Senior marketing or advertising leader responsible for digital media buys • Active decision-makers currently employed at a brand which spends on advertising in MENA
Sample Size	• Targeted **241 completes of senior brand leaders** distributed across areas of expertise and targeted MENA and APAC markets

Interview Overview

Objective	These interviews captured sentiment on: • Ad channel and ad product priorities for investment and expectation for ROI • Digital ad ecosystem challenges and preference for mitigation
Inclusion Criteria	• Senior leadership primarily from IAB members (ad sellers and ad buyers) or affiliated companies
Roles	• Interviewees were focused within ad sales, ad tech, and overall strategy functional areas • Roles focused on **C-suite executives** and **managing directors**

The Study highlighted four key steps to grow the digital ad market in MENA

Key Takeaways

1. Address limited buyer confidence by **improving transparency on ad measurement and inventory cost**

2. Invest in sufficient **education to enable buyer demand for unified buys** across emerging digital channels

3. Make space for ad suppliers to take a more active role in **addressing audience data and attribution gaps**

4. Align ad supplier and ad buyer perception of ROI from **investment in emerging ad products**

Source: Altman Solon

While MENA marketers prioritize social media, other channels can gain increasing share of ad wallet through enhanced data transparency, education, and ad tech

Market Indicators	Our Take
Preference for Social; Growing Appetite for Emerging Digital • Across both GCC and non-GCC markets tested, social media prevails as the highest allocated share of spend across digital advertising channels • MENA marketers expect to increase demand for DOOH, CTV and Digital Audio inventory; growing consciousness of cross-channel relevance as well as challenges	Scaling digital ad spend in MENA is highly dependent on improved marketer and ad buyer education and greater perceived transparency on ad measurement and cost
Shared Focus on Activation of Broader Ad Wallet • To support broader share of working and non-working media spend, agencies and digital ad sellers in MENA are investing in data products and adjacent services to both gain share and fill current market tech voids • Strong focus on mid-market and SMB buyer activation aligns with demand potential	Ad buyers and ad sellers will be better positioned to scale share gain and grow the MENA digital ad market if they can address operating inefficiencies and share data
Cross-Ecosystem Alignment on Growth Challenges • MENA ad sellers and agencies overwhelmingly see ad tech capability and product investment as the best mitigation tactics to address concerns related to limited marketer education, ad fraud, and attribution	Global ad techs and MENA ad sellers have an opportunity to define their value proposition to marketers by greater emphasis on ecosystem challenges mitigation

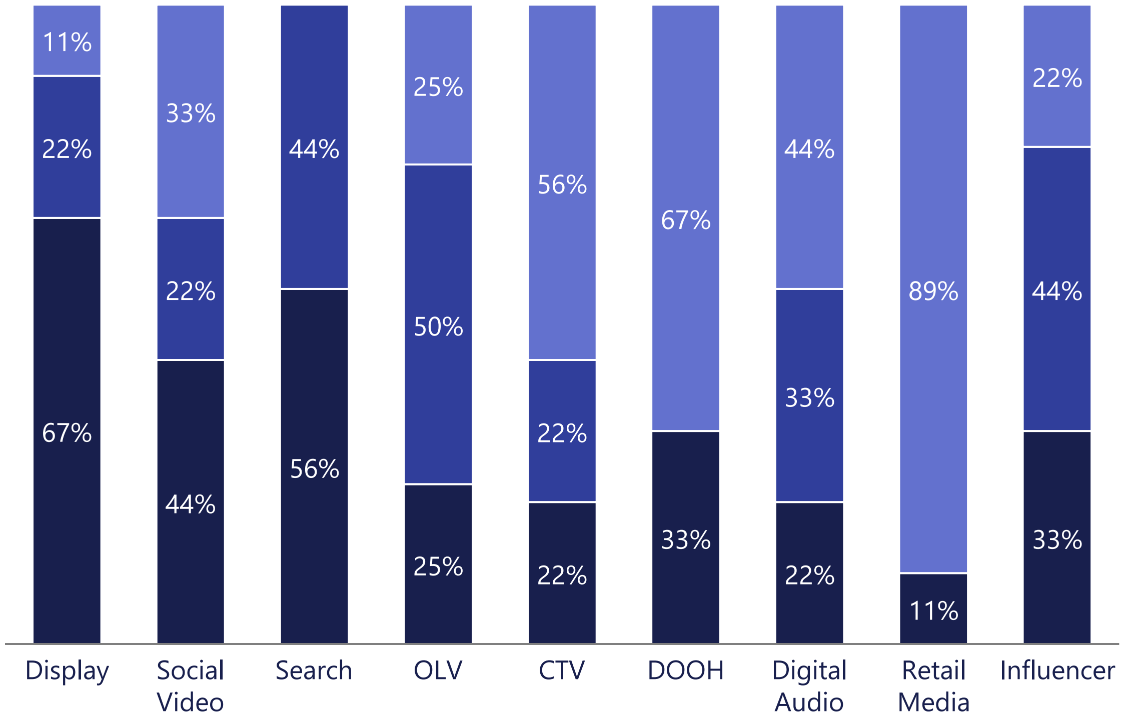
MENA ad sellers and agencies anticipate further digital ad spend from Social Video, CTV, Retail Media, and Influencer channels

Incremental Ad Channel Growth (MENA-based)

% of respondents, N=9

Q: Please confirm for which ad channels you anticipate incremental growth in demand during the next year from MENA-based advertisers and ad buyers (agencies)?

10%+ Growth | 6-9% Growth | 1-5% Growth

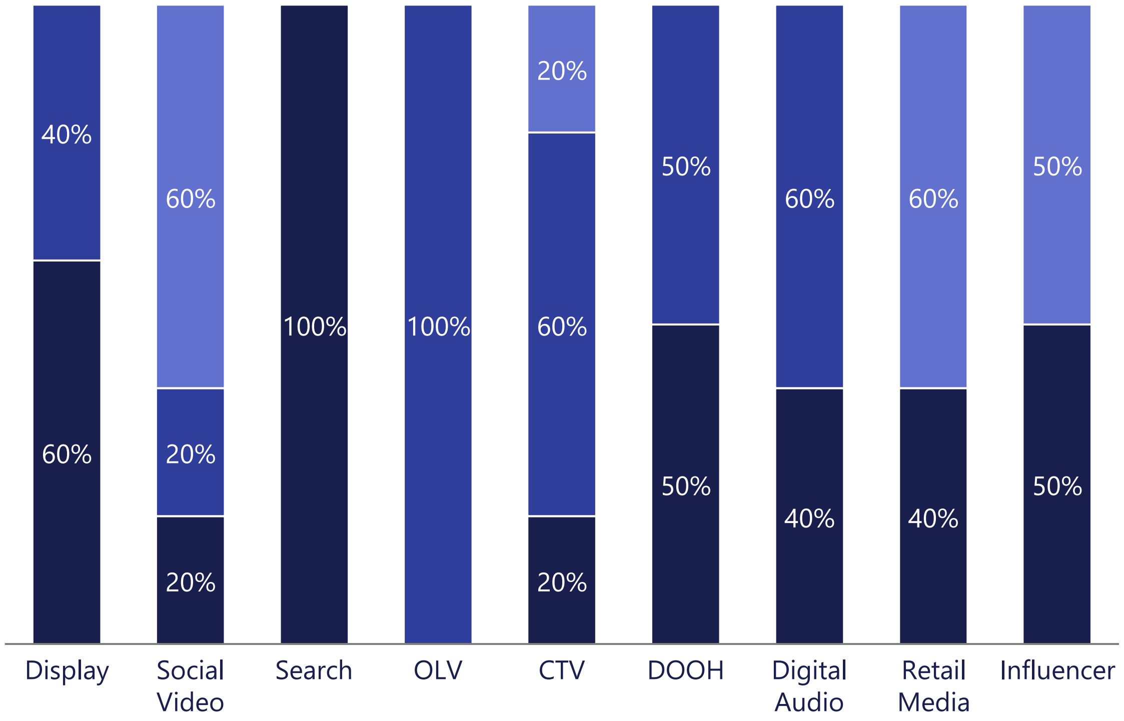


Incremental Ad Channel Growth (non-MENA-based)

% of interviews, N=5

Q: Please confirm for which ad channels you anticipate incremental growth in demand during the next year from non-MENA-based advertisers and ad buyers (agencies)?

10%+ Growth | 6-9% Growth | 1-5% Growth



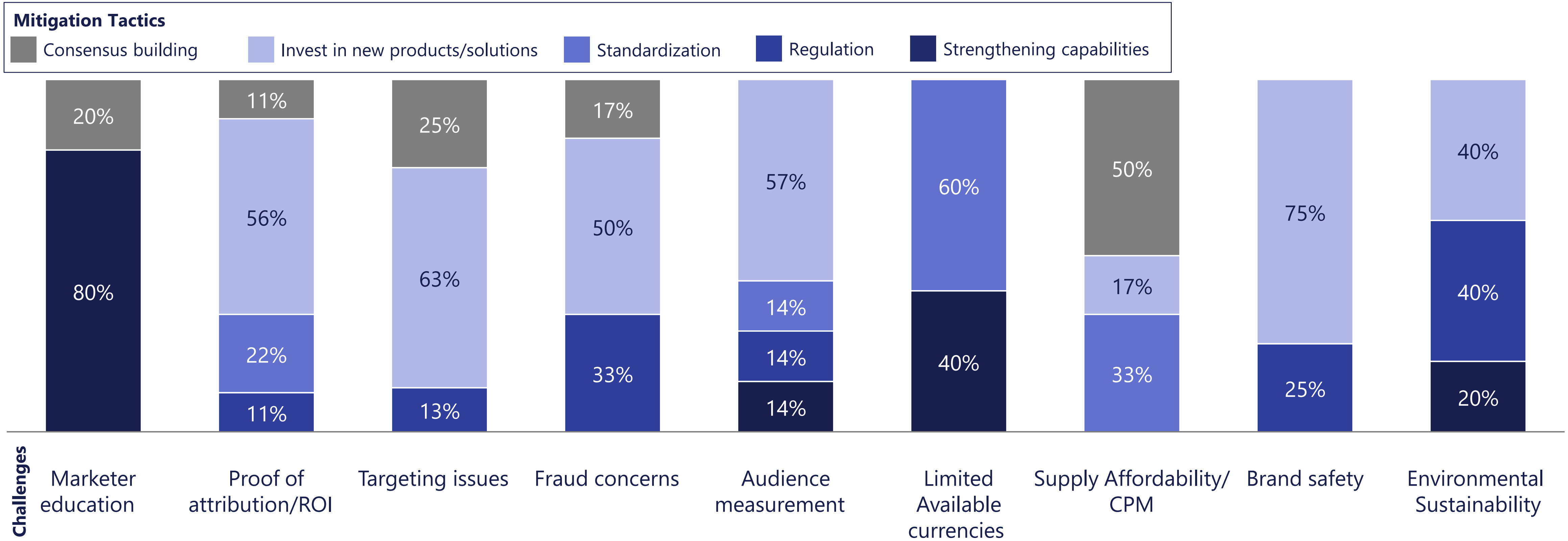
Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Ad sellers and agencies in MENA over-index on investment in new products and solutions as a mitigation tactic for a variety of digital ad ecosystem challenges

Challenges Represented by Mitigation Tactics

% of Respondents, N= 9

Q: Select what you believe are the top 5 challenges affecting digital ad sellers at an ecosystem level in MENA. Which mitigation tactics, if any, are most relevant to these challenges?



Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Currently, education on the digital ad ecosystem in MENA remains insufficient to support buyer demand and growth objectives for emerging digital channels

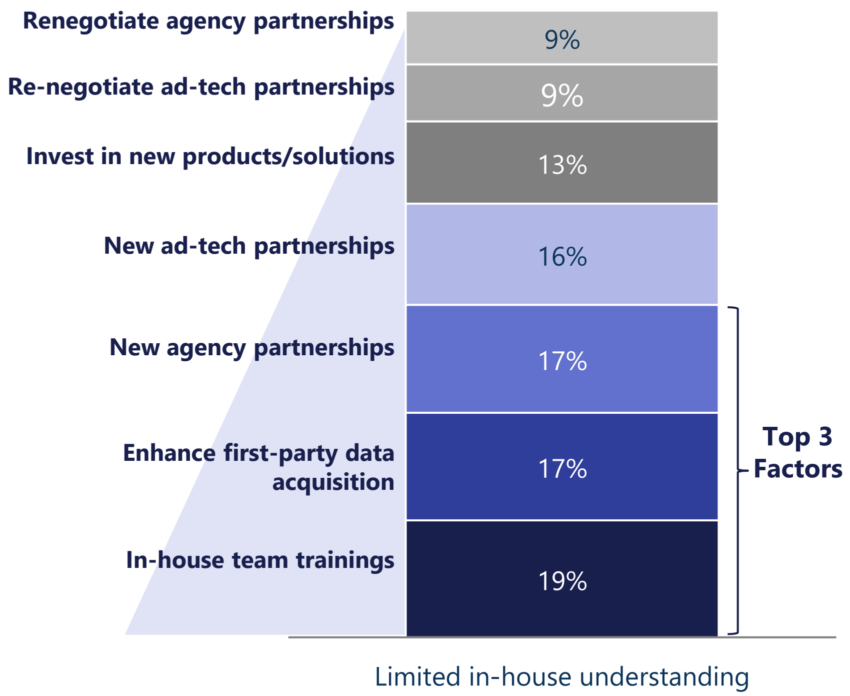
Market Indicators	Our Take
Lack of Understanding of Non-Social Digital Complicates Growth • MENA marketers and ad buyers generally view non-social digital ad inventory as overvalued – however, this stems from a lack of understanding of reach and metrics • Strong marketer demand for upskilling on digital ad data and cross-channel planning from agencies and ad sellers; opportunity for broader partnerships	MENA ad sellers and ad buyers have a unique opportunity to fill an education void for marketers through closer ad seller partnerships and data sharing with clients
Data as a Catalyst for Evolving the Perception of Ad Success • Limited understanding of ad success metrics complicates ad sales for emerging digital channels – particularly for attribution, impressions delivered and ROI/ROAS • Marketers in MENA are increasingly focused on attribution but lack a standard approach to measure impact; legacy focus on marketing vs. business metrics • Chinese and Indian marketers require greater data education to activate MENA demand	Cross-ad seller and agency partnership to standardize ad measurement process and metrics will be critical to simplify how the ecosystem measures ad success in MENA
Marketer Autonomy Gaining Traction for In-house Programmatic • Growing marketer familiarity with programmatic coupled with the intent to upskill in-house teams highlights the potential for more MENA brand in-house buys • Transparency challenges related to data and campaign costs as well as a lack of understanding of campaign results hinder MENA in-house programmatic ad buys • Greatest marketer concern for ad fraud within programmatic environment	Ad sellers and agencies can enable brands to be more informed and engaged as to how independently execute in-house programmatic buys – with agency support

88% of CMO-level respondents indicated they experienced limited in-house understanding of digital ad buys and were planning to act as a result

Marketer Preferred Mitigations for Limited In-House Understanding of Digital Advertising

% of Respondents, N= 214

Q: What actions will your company take to address limited in-house understanding of digital ad buys?



In-House Team Trainings

- Greatest in-house education gaps centered around:
  - Campaign alignment to internal data strategy
  - Marketing vs. business objectives for campaigns
  - Value and success metrics of non-social channels

Enhance First-Party Data Acquisition

- Marketer perceived first party data needs focused on:
  - Integrated cross-channel dashboard
  - Marketing mix modeling based on customer
  - Attribution data to accurately estimate ROAS

New Agency and Ad Tech Partnerships

- Marketers are prioritizing new partnerships with:
  - Agencies that provide verticalized upskilling on digital media buying
  - Ad techs with broader cross-channel ad seller integrations and reporting relationships

"**The challenge is educating the client at an industry level.** Many clients only want to invest in what they know."
– Integrated Agency Leader

"Data is a challenge that's closely tied to education because **when advertisers aren't properly educated, they won't have proper measurement setup and infrastructure in place**."
– Head of Strategy & Operations MENA, Global Ad Seller

"Our strategy includes **online platforms with educational modules and certification training** programs. We provide direct training to our larger clients and scalable educational platforms for SMBs."
– Sr. Executive, Regional Ad Seller

Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

MENA marketers express under-investing in CTV, DOOH, Digital Audio, and non-Social Display due to limited understanding of value proposition and cost

Greatest Reasons for MENA Marketer Digital Ad Under-Investment

Perceived Overvaluation of Non-Social Ad Supply

Marketers overwhelmingly find non-social media ad supply in MENA to be overvalued due to:

- **Perception of limited reach** (e.g. younger audiences do not consume non-Social Video or non-podcast Digital Audio)
- Perception that non-social channels are **not effective for performance marketing**

"CPMs are definitely the biggest issue for ad sellers because no one's making money. **The challenge lies in the perception of these CPMs** by buyers, particularly for certain types of inventory. **The lack of education regarding different products is one of the biggest issues in the market**."
– Media Director, Regional Ad Seller

Lack of Understanding of Non-Social Metrics

MENA marketers are highly unexposed to non-social-focused campaign success metrics, which drives:

- **Delayed or lost sales cycles and renewals**
- **Confusion about relevance and functionality of non-click-through metrics**
- Misunderstandings about **accuracy of ROAS and campaign attribution**

"Greater marketer autonomy of Total TV ad buys is unlikely because there's still **so much learning that needs to happen** with agencies. Marketers don't know the difference between CTV, OEMs or other types of video."
– Sr. Executive, Regional Ad Seller

Inability to Define or Distinguish Premium Ad Inventory

MENA marketers often do not have a clear or consistent definition of premium ad inventory, which often contributes to:

- Undervaluing ad inventory from ad sellers with highly distinctive content and audiences
- Lack of understanding of the first party data benefits from premium ad sellers

"Our audiences don't care if they engage with us via a premium ad seller or social media. In the end, we will prioritize conversion at affordable rates."
– Marketing Leader, T1 MENA Telco

Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Offering greater education around ROI/ROAS and attribution have the potential to enhance MENA marketer appetite for emerging digital channels

Key Drivers for Channel Spend Growth for MENA Marketers

% of Respondents Who Did Not Select a Channel as Preferred, N= 214

Q: Which of the following would contribute most significantly to making your company more likely to invest in the non-preferred channels within MENA? Select up to 3.

		Impression delivery transparency	Cross-channel measurement	Ad-tech fees transparency	MENA-based partners	Attribution data transparency	Cross-market measurement	Higher perceived ROI	Brand safety	Tool fees transparency	Reduced ad fraud
	Social Media	40%	40%	35%	35%	32%	32%	26%	26%	19%	11%
	OLV	31%	31%	29%	36%	29%	26%	34%	28%	26%	16%
	Search	38%	30%	31%	41%	27%	27%	25%	35%	26%	18%
	Display	36%	23%	28%	38%	39%	19%	37%	30%	28%	16%
Emerging Channels	**CTV**	33%	30%	30%	30%	28%	30%	28%	22%	30%	20%
Emerging Channels	**DOOH**	34%	22%	28%	25%	39%	30%	34%	28%	30%	15%
Emerging Channels	**Digital Audio**	31%	27%	31%	28%	36%	30%	40%	24%	27%	14%

Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Perceived ROI

- Perceived lack of potential ROI limits ad spend on emerging digital channels, with 40% of marketers reporting not investing in Digital Audio due to ROI

Attribution Data Transparency

- Undefined marketer data strategies complicate the ability to more meaningfully leverage first party or acquired in-house data to strengthen attribution-related insights

Impression Delivery Transparency

- MENA marketers expressed a lack of understanding of non-social impression metrics and data sources

"We frequently encounter advertisers with enormous potential for podcast advertising, both in terms of ROI and potential spend with broadcasters, **but this potential remains unrealized when managed by teams lacking digital expertise or podcast familiarity**."

– Sr. Executive, Regional Ad Seller

Marketers face challenges with fragmented audience data, unclear consumption insights, and attribution gaps that obscure advertising impact across channels

Market Indicators	Our Take
Marketers consider data to be their greatest challenge in MENA • Limited access to data across siloed platforms and fragmented audience segmentation create difficulties for marketers to gain a unified view • Limited transparency in attribution data makes it difficult for buyers to link consumption data to conversions, which limits accurate understanding of ad impact	There is ample opportunity in MENA to elevate the level of cross-ad seller and retailer data sharing to build greater marketer confidence in ad impact and accurate measurement
Ad sellers have an opportunity to directly support buyer data needs • Marketers see a unique role for MENA ad sellers as broader educators around how to interpret insights from audience measurement to attribution data • As MENA marketers of all sizes invest in first party data, ad sellers hold a unique role in helping them to plan and optimize digital campaigns using proprietary data	As marketers in MENA collect more data, ad sellers can build greater trust and more direct relationships using insights from proprietary data more verticalized ad products
Broader data partnerships could grow digital ad spend in MENA • Marketers and agencies perceive a lack of ad seller willingness to share proprietary data for improved transparency in ad effectiveness and addressability • ad sellers can use neutral third-party capabilities (e.g. clean rooms) to partner on cross-channel measurement initiatives to enhance buyer confidence in data fidelity	Scaled global and regional ad sellers can safely pool proprietary data via third party or joint venture entities to increase fidelity of cross-channel ad measurement

Marketers expect ad sellers in MENA to support their data strategies across various emerging needs

Most Frequent MENA Marketer Expectations for Ad Seller Data Support

Complete Data across the Audience Journey

Marketers expressed interest in an ad seller-hosted "one stop shop" hub which would enhance transparency and access to:

- **Audience data**
- **Impression-level data**
- **Attribution data insights**

"I would say transparency would be first for me. When I say transparency, I need to trust what ad sellers are saying, which is currently a missing link. There is a lot of mistrust in these players because we see ad sellers as being run by someone from the West at the top of the helm. There's no conviction behind what ad sellers are offering.."

– CMO, MENA Marketer

Ad sellers-as-Educators

Marketers see a unique role for ad sellers as educators around the digital advertising process – with a specific focus on:

- **Making sense of audience to attribution data**
- **Planning and optimizing campaigns** using first party marketer data

"I am asking for only two specific types of data from the agencies: the attribution model data and the placement level data. These are the two components we require for our current development.."

– GM Digital Marketing, MENA Marketer

Verticalized Ad Solutions

Ad sellers can provide innovative and highly-verticalized solutions first- and third-party may:

- Reflect vertical best practice from more mature markets
- Scale use of first- and third-party data for enhanced ad investment decisioning

"Regarding ad seller data specifically, I know that Google and Meta have personnel dedicated to auto category large-scale clients, but we don't have access to these resources. The ad sellers have case studies and back packages from other clients that could be valuable for us.."

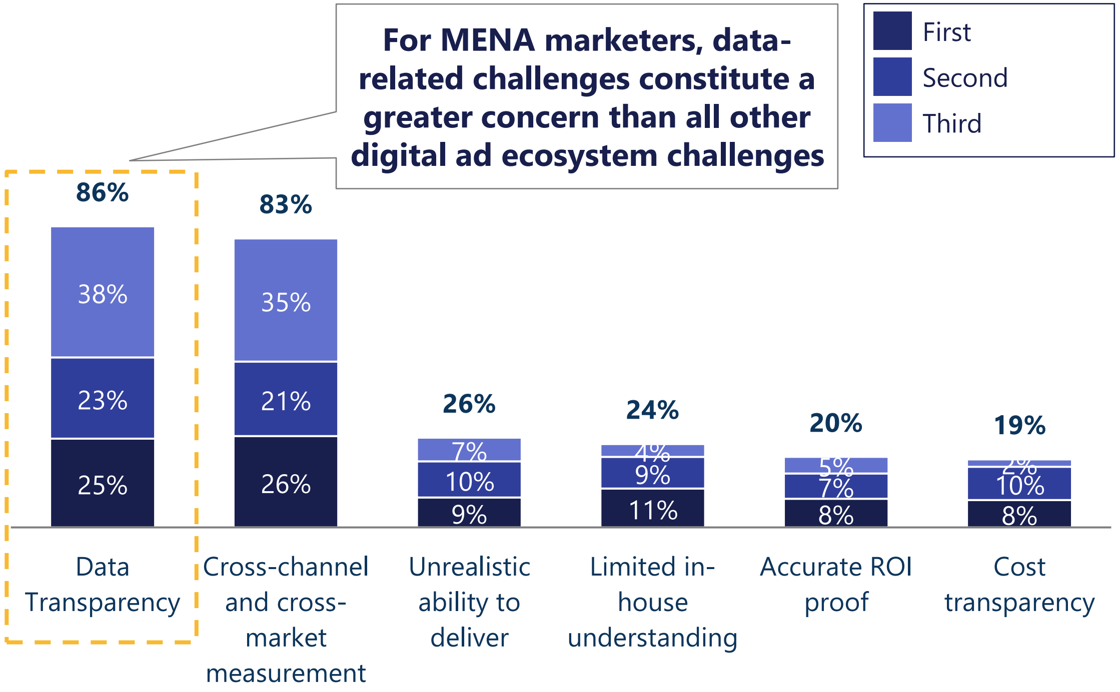
– Product Marketing Lead, MENA Marketer

Data transparency, measurement, and partner integration gaps are hindering ad growth potential in MENA

Marketer Perception of Digital Ad Ecosystem Challenges

% of Respondents, N= 241

Q: What do you view as the biggest challenges affecting your company's advertising media purchasing for MENA?



"We need **transparency regarding product placement, sponsorship, and viewer data**. Currently, there's **significant variance in data points between agencies**. For instance, when we have one agency managing media partnerships and another handling Google Ads, these agencies aren't aligned with each other."

– CMO, MENA Marketer

"Here in Middle East, it's like operating in a black box… the **agencies are not able to provide data that could pinpoint the audience who visited my advertisement**."

– GM Digital Marketing, MENA Marketer

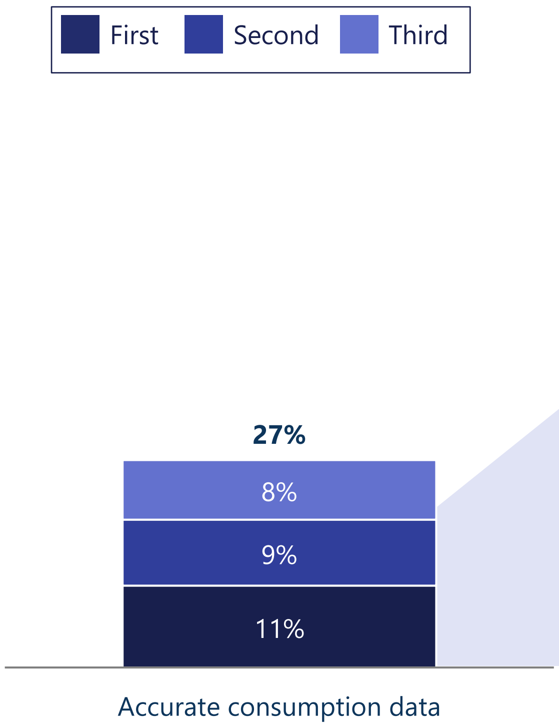
Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

The MENA advertising ecosystem is acutely impacted by limited ad consumption data, which complicates investment in what is perceived as unmeasurable

Accurate Consumption Data[1]

% of Respondents, N= 241

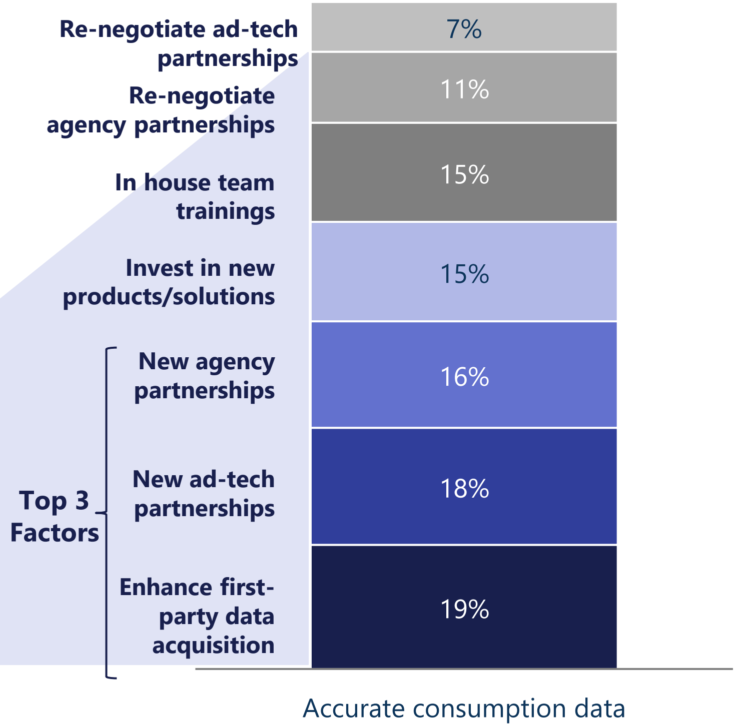
Q: What do you view as the biggest challenge affecting your company's media purchasing for MENA? Select and rank the top 3.[2]



Addressing Consumption Data

% of Respondents, N=69

Q: What are the most significant actions your company will take to address this challenge? Select up to 3.



- To combat challenges with accurate consumption data, marketers are looking to strengthen first-party data collection and **create new partnerships** with ad-tech companies and agencies to enhance data accuracy, refine audience targeting, and optimize campaign performance
  - This demand reflects the need for more accurate data insights so that buyers have **a clear idea of impression and delivery measurements**

"..As a marketer, I don't know who to trust anymore with regard to data. Most of us are living quarter-to-quarter to meet our targets."

- CMO, Global CPG Retailer (MENA Subsidiary)

"Until we address these misconceptions and **establish transparency around inventory availability and consumption patterns**, the **disconnect between actual value and market perception** will persist."

- Media Director, Regional Ad Seller

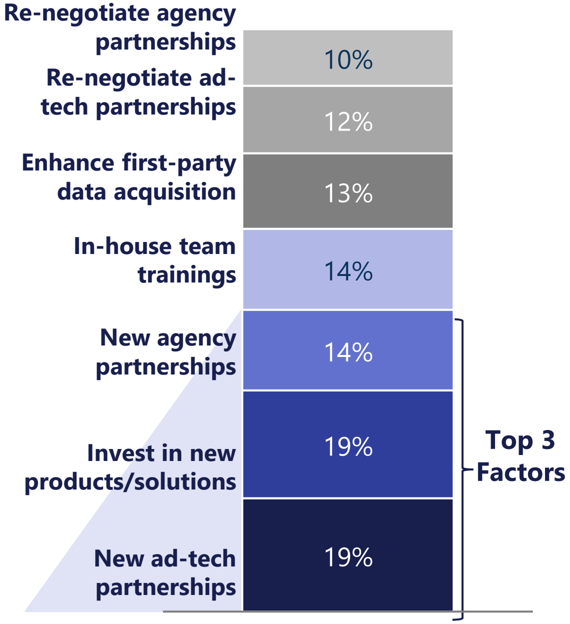
Notes: 1) Respondents were able to select up to 3 options; 2) Respondents were asked to compare challenges out of 11 options; Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

For MENA marketers which report attribution data transparency as their greatest challenge, investment in ad tech partners and ad solutions are key for mitigation

Accurate Ad Attribution Data in MENA [1]

% of Respondents, N= 241, N=74

Q: What action will your company take to address your greatest perceived challenge affecting digital advertising in MENA?



Lack of access to transparent and easy to understand attribution data

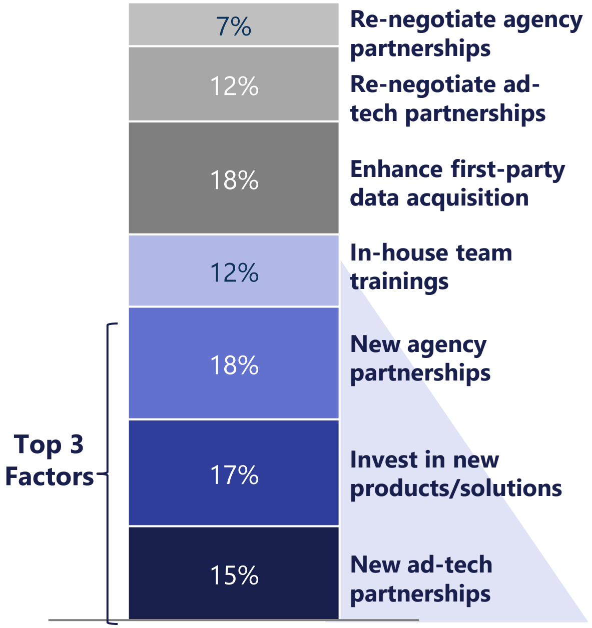
- Marketers in MENA find **a lack of accessible and accurate attribution data** which deciphers the impact of ad impressions on business metrics such as sales conversions, revenue generation and related digital/foot traffic

- To mitigate these challenges, MENA marketers are prioritizing:
  1. **Collaborative partnerships** with retail media players which provide loyalty and commerce data exchanges
  2. Investment in **new products and services** such as:
     - Multi-touch attribution models to assign value at consumer interaction level
     - Consumer data platforms
     - CRM solution upgrades

Accurate ROI Proof[1]

% of Respondents, N= 241, N=74

Q: What is the biggest challenge affecting your company's amedia purchasing for MENA?[2]; What action will your company take to address this?



Lack of access to transparent, accurate ROI proof

Notes: 1) Respondents were able to select up to 3 options; 2) Respondents were asked to compare challenges out of 11 options;
Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Ad sellers, agencies, and marketers in MENA express diverse ad tech investment priorities to generate ROI; marketer sentiment on ad fraud channel-dependent

Market Indicators	Our Take
MENA ad sellers view efficiency-driving ad products and innovative formats as top investment priorities • Ad products which reduce cost-to-publish campaigns and manage yield are perceived as key ad seller priorities to drive ROI • MENA marketers over-index on self-service buy tools and cross-platform attribution compared to how ad sellers plan to invest in their ad tech suite	Ad sellers in MENA have broader opportunity to align at tech investment plans with marketer priorities for ad product demand
Emerging ad products are the driver for MENA marketer ad spend; Chinese/Indian marketers driven to spend on new channels in MENA • Non-GCC markets tested (Egypt, Jordan, Iraq) over-indexed on emerging ad products as the core driver for new digital ad spend in MENA • Shoppable and interactive ad formats are the emerging ad formats which MENA marketers believe will generate the greatest ROI from campaigns	Ad sellers and agencies in MENA can market their ad products and formats based on buyer drivers by region and vertical
Marketers have mixed views on the degree to which ad fraud is seen as an issue in MENA • The extent of marketer concern for ad fraud in MENA often depends on channel spend; marketers find Search, Social Media, and OLV as most impacted channels • China and India-based marketers plan to increase internal awareness of campaign ad fraud for MENA, which is a 15% difference with GCC marketers	Data transparency, ad tech partnerships and greater education are critical for marketers to build greater confidence

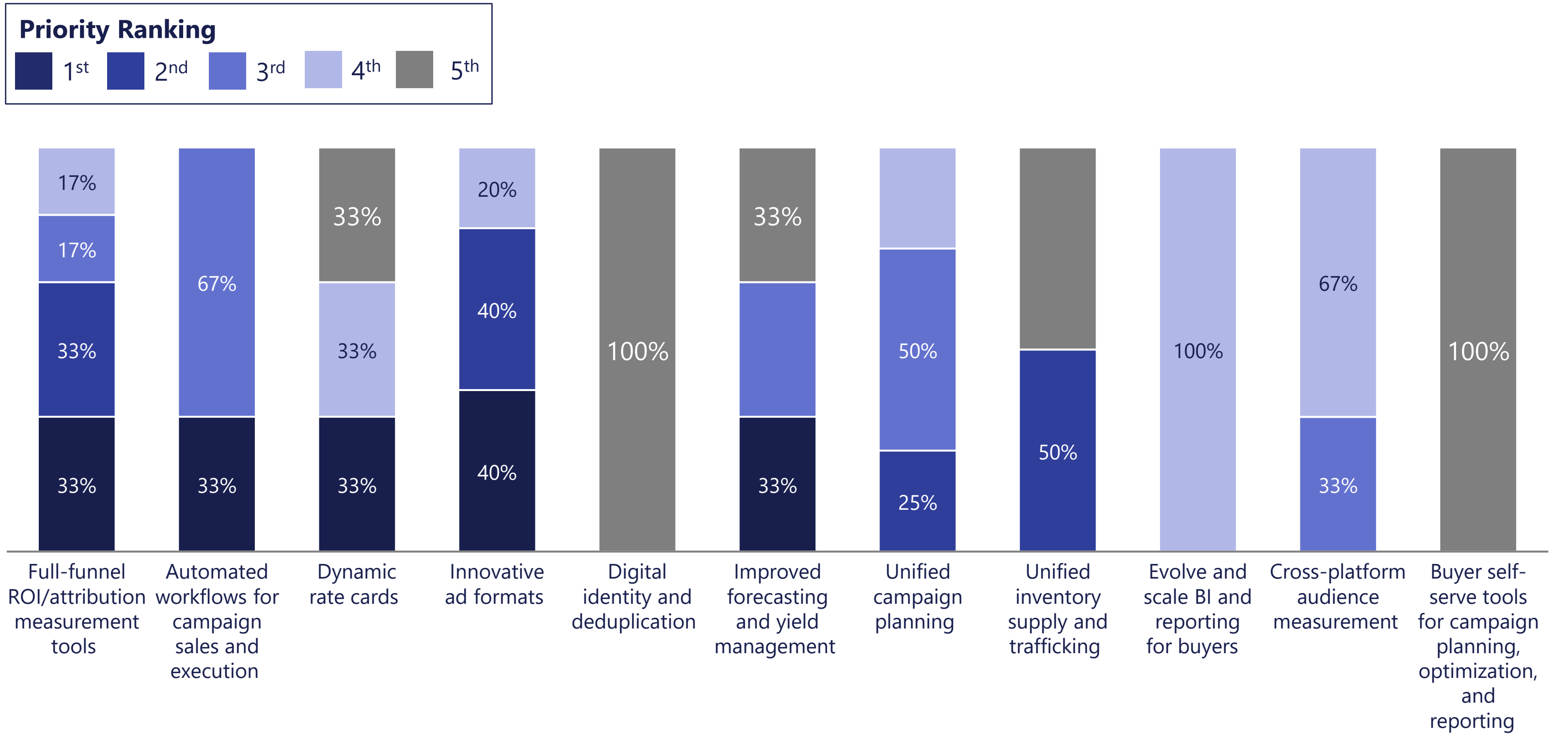
Source: Altman Solon Research & Analysis

For MENA ad sellers, investment in digital ad products appears highly fragmented across various capabilities; core focus, however, is on measurement

Top 5 Investment Priorities

% of Respondents per Priority, N = 7

Q: Based on the presented list of ad product and product-related capabilities, please select and rank the top 5 priorities for your company from a planned internal investment perspective (meaning that this initiative is not paid by an advertiser).



"In some of our other markets, we have implemented **a single source panel for cross-channel measurement.** We haven't implemented this in MENA yet, primarily because it's very expensive. Our advertisers periodically conduct media mix modeling to evaluate the value they're getting from different channels."
– Head of Strategy & Operations MENA, Global ad seller

"Companies are investing in attribution tools and capabilities that can demonstrate **who is converting**."
– Co-Founder, Regional Director

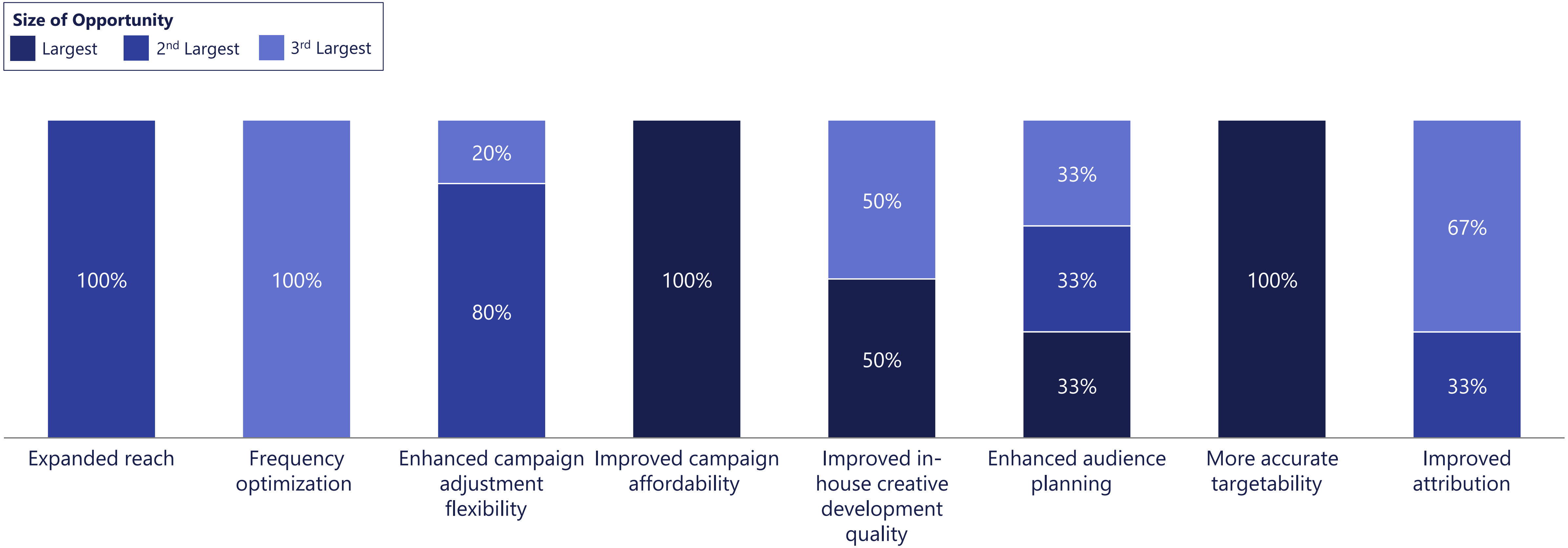
"We're implementing cross-device targeting capabilities. When we target someone viewing content on a connected TV, we can link that viewing to the same person's mobile phone activity. **This allows us to track when that specific viewer completes a purchase on their mobile device**, thereby attributing the conversion to the TV advertisement exposure."
– Sr. Executive, Regional Ad Seller

Specifically for MENA-based ad sellers, improved campaign affordability is considered the largest revenue generating opportunity for digital advertising

Top 3 Perceived Revenue Generating Opportunities

% of Respondents per Opportunity, N = 7

Q: From the below list, which do you view as the top three biggest revenue-generating opportunities in digital advertising for the MENA region?

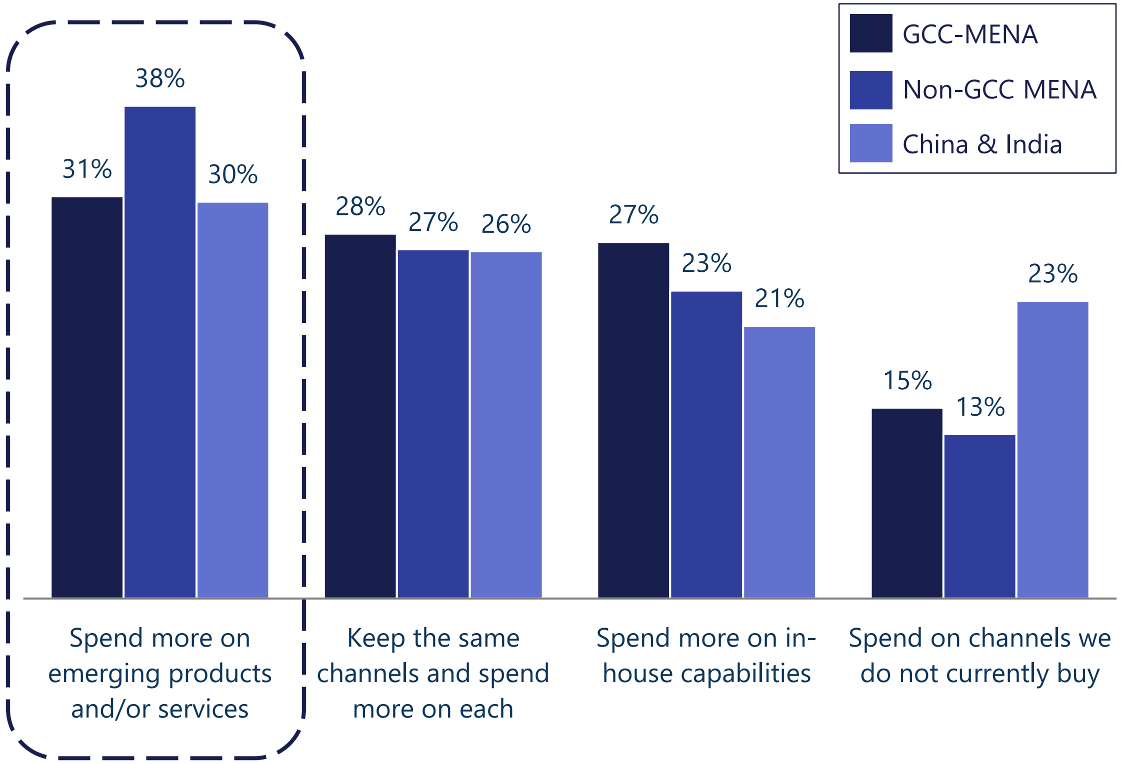


Marketers in MENA, China and India expect to increase ad spend for emerging products/services over the next year

Reasons for Increase in Ad-Related Spend in MENA

% of Respondents, N= 183

Q: Why do you expect your company to increase its MENA ad-related spend over the next 12 months?



"The key to success in this market is being able **to offer something unique and interesting that stands out** – something that becomes inherently valuable to potential buyers. While standard solutions form the foundation, it's the distinctive elements that often drive final decisions and create compelling value propositions for clients."
– VP of Digital, Regional ad seller

"For the specific initiatives: growing own digital inventory, offering unified ad sales, and **offering more innovative ad formats are all high ROI.** "
– Media Director, Regional ad seller

Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Marketers and agencies in MENA expect to derive the greatest ROI increase from Shoppable Commerce and other interactive ad formats

Emerging Ad Formats

Shoppable Ads

- Various creative formats are increasing in usage, such as shoppable ads where viewers can directly buy products via scannable QR codes
- Strong revenue growth is projected for these formats, presenting a key opportunity for non-premium ad sellers to capitalize on emerging ad formats that some studios are restricted from implementing

Interactive Ads

- Encourages active participation and engagement
- Captures direct feedback on user preferences, which can help advertisers optimize and personalize ads
- Serves as a direct source of attribution-focused or measurable campaign impression data points

"Regarding shoppable formats, this ties back to our discussion about retail media and shopping in general - it's a big focus for us. We've revamped our entire shopping experience as it's become increasingly important. **Shopping formats and shopping-related formats are definitely a key priority**."
– Head of Strategy & Operations MENA, Global Ad Seller

"I like what Hulu has been doing in the US where Hulu **shows an ad and makes it interactive**, allowing the viewer to indicate if they liked or didn't like the ad, or **select to be sent information about it**."
– Media Director, Regional CTV Ad Seller

"While standard [advertising] solutions form the foundation, it's the **distinctive elements that often drive final decisions** and create compelling value propositions for clients."
– VP Digital, Regional CTV Ad Seller

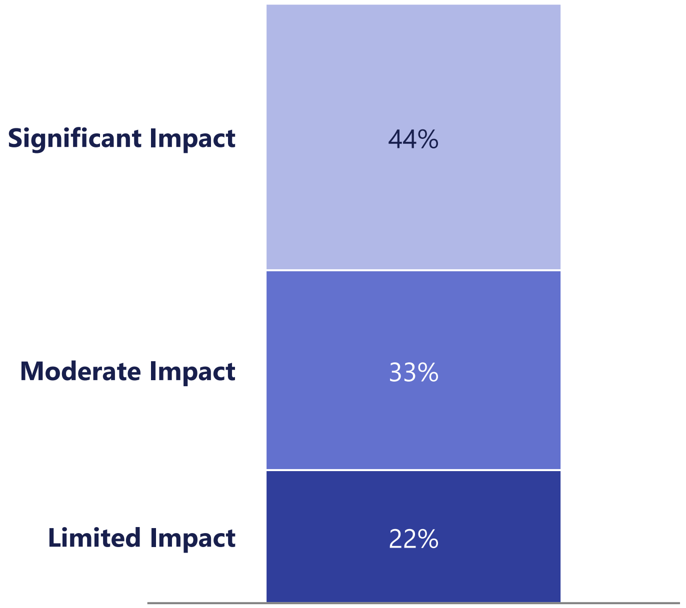
Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

Concern about ad fraud in MENA is highly mixed; marketers find Search, Social Media, and OLV as most impacted channels

Ad Supplier Perception of Ad Fraud

% of Responses, N= 9

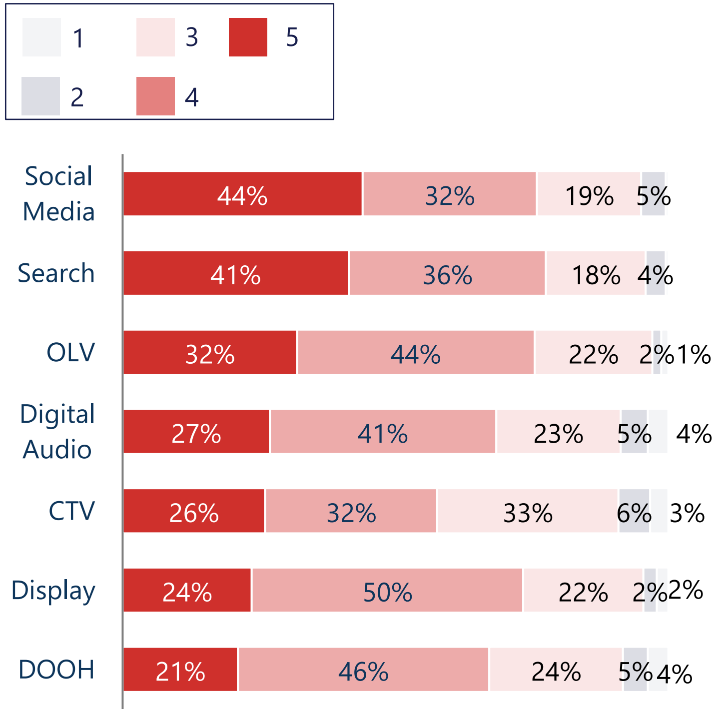
Q: How much impact does your agency believe that ad fraud has on the ad ecosystem in MENA?



Marketer Perception of Ad Fraud

% of Responses, N= 241

Q: What is your perception of the impact of ad fraud in MENA across the following digital channels? Rate on a scale of 1-5, where 1=No Impact and 5=Significant Impact.



- Marketers have **mixed views** on the degree to which ad fraud is seen as an issue
- While the majority report ad fraud as having an impact, **fraud reduction tools do little to improve perceptions** of specific inventory channels, as many accept ad frauds as is if sales and ROI remain strong

"Ad fraud is **a significant concern** in our market. I can share a specific example: In one case involving a cost-per-lead campaign for a car advertisement, **the ad seller took unauthorized actions** by modifying the creative content themselves and changing the price points."
– Sr. Executive, Regional Ad Seller

"**I haven't seen any relevant study within our markets from different sources that shows a high fraud volume.** This makes it difficult to assess whether ad fraud prevention is really needed. "
– General Manager, Regional Ad Seller

Sources: 2025 MENA Ad Buyer Survey, Altman Solon Research & Analysis

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