

# **MENA Advertising Market: Analysis By Channel (Digital, Television, Outdoor, Newspaper, Magazine, Others), By Region (Saudi Arabia, UAE, Egypt, Kuwait, Qatar and Rest of MENA) Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2029**

<https://marketpublishers.com/r/M6E91D0D4603EN.html>

Date: May 2024

Pages: 98

Price: US\$ 2,250.00 (Single User License)

ID: M6E91D0D4603EN

## **Abstracts**

Advertising is a form of marketing communication that focuses on promoting products, services, brands, or concepts to a specific audience through paid media outlets. The MENA advertising market refers to the industry involved in creating, distributing, and managing promotional messages and campaigns across various media channels within the Middle East and North Africa (MENA) region. MENA region includes countries such as Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, Palestine, and Yemen. Various forms of media, including television, radio, print, outdoor billboards, digital platforms, social media, and others, are used to reach consumers and effectively communicate messages. The MENA advertising market value stood at US\$8.11 billion in 2023, and is expected to reach US\$17.36 billion by 2029.

MENA advertising market is augmenting due to the significant increase in the use of smartphones. As a high rate of mobile penetration and a population that is familiar with using apps, this offers a great opportunity for advertisers to connect with their desired audience. Mobile ads currently make up the largest portion of the digital advertising market in the MENA region. Moreover, advertisers are more and more turning to programmatic advertising, a strategy that utilizes data and technology to serve personalized ads. Additionally, an increasing number of individuals in the MENA region are gaining internet connectivity, allowing them to be exposed to online marketing, including the widely popular social media platforms in the area. Overall, increased media consumption, new media channels and new advertising formats that can not only

support brands, but also drive performance-based actions and outcomes – and increased advertiser demand, driven by new products, increased competition and the broader shift to the digital economy are the significant factors that would boost the MENA advertising market growth. The market is expected to grow at a CAGR of 13.39% over the projected period of 2024-2029.

#### Market Segmentation Analysis:

**By Channel:** The report provides the bifurcation of the MENA advertising market into six segments on the basis of channel: digital, television, outdoor, newspaper, magazine and others. Digital advertising segment is both the largest and fastest growing segment of MENA advertising market. Social media and video advertising are driving the growth of the digital advertising market in the MENA region. Major players like Facebook and Google are dominating a large portion of digital advertising spending, with a focus on the Facebook Advertising Network and Google's YouTube Video Advertising. Paid social media advertising is the biggest segment of digital advertising spending in the region, showcasing a move towards more interactive and visually attractive ad formats. Additionally, the GCC region is increasingly moving towards performance-based advertising, showing a strategic shift towards more efficient and trackable advertising strategies.

**By Region:** The report provides insight into the MENA advertising market based on regions namely, Saudi Arabia, UAE, Egypt, Kuwait, Qatar and Rest of MENA. Saudi Arabia is the largest region of the MENA advertising market. Saudi Arabia advertising market is increasing as the region boasts a sizable youth population, with a significant number of individuals aged below 30. The younger demographic shows a greater openness towards advertising, especially through online platforms. Advertisers are eager to capitalize on the purchasing power and impact of this demographic, leading to a rise in investments in advertising campaigns that cater to their preferences and behaviors. Moreover, Saudi Arabia is currently undergoing fast urbanization as more individuals are relocating to cities in hopes of finding improved prospects. Major urban areas including Riyadh, Jeddah, and Dammam are evolving into bustling centers of economic activity, drawing in companies seeking to broaden their influence.

UAE advertising market is surging because the UAE has one of the highest per capita incomes in the world due to its strong economy and policies that support businesses. The wealthy population in the country has a high level of purchasing power and a preference for luxury items, top-notch services, and exclusive experiences. Marketers take advantage of this by showcasing high-end products and personalized services to

attract the affluent consumer group. Moreover, events such as Dubai Expo, Formula 1 Grand Prix, and various cultural festivals attract millions of visitors annually, presenting opportunities for advertisers to promote tourism-related services, hospitality, retail, and entertainment offerings.

The report also provides the analysis of MENA digital advertising market based on regions namely, Saudi Arabia, UAE, Egypt, Kuwait, Qatar and Rest of MENA. South Arabia held the highest share of the MENA digital advertising market, whereas Egypt is expected to be the fastest growing region in the forthcoming years.

#### Market Dynamics:

**Growth Drivers:** The MENA advertising market has been rapidly growing over the past few years, due to factors such as economic growth and market expansion, growing young and tech-savvy population, rising mobile subscription, augmenting social media users, expansion of marketing agencies, government support, e-commerce expansion, etc. Economic growth and market expansion in key MENA markets like Saudi Arabia, the UAE, and Egypt play a crucial role in driving advertising expenditures in the region. As countries within the region experience economic expansion and rising per capita income levels, consumer purchasing power increases. This leads to higher levels of discretionary spending, including investments in goods and services promoted through advertising. Additionally, the growth in population size and tech-savviness presents opportunities for advertisers to innovate and create personalized, interactive advertising campaigns that resonate with the preferences and lifestyles of the younger generation. Moreover, As digital advertising continues to evolve with advancements in technology and data analytics, it is expected to drive further market growth in the MENA region by offering advertisers innovative ways to engage with consumers and drive business outcomes.

**Challenges:** However, the MEA advertising market growth would be negatively impacted by various challenges such as, infrastructure gaps, diverse market dynamics, etc. Infrastructure gaps significantly hinder the growth of the MENA advertising market by limiting the reach and effectiveness of digital campaigns. In many parts of the region, there is still inadequate internet penetration and access to high-speed connectivity, particularly in rural and less developed areas. This disparity restricts the potential audience for digital advertisements, compelling advertisers to rely on traditional media channels, which may not offer the same level of engagement and measurability as digital platforms.

Trends: The MENA advertising market is projected to grow at a fast pace during the forecasted period, due to rise in augmented reality (AR) and virtual reality (VR), influencer marketing in MENA, rise of digital out-of-home advertising, integration of AI in MENA advertising, programmatic advertising, rise of localized content, video content dominance, sustainability and social responsibility, etc. The rise of Digital Out-of-Home (DOOH) advertising is a notable trend in the MENA advertising market, reflecting the region's increasing embrace of digital technology in advertising strategies. DOOH offers advertisers the ability to deliver dynamic and interactive content to consumers in outdoor settings, such as malls, airports, and transit stations. In addition, as AI continues to evolve and become more sophisticated, its integration into MENA advertising will likely accelerate. Advertisers who harness the power of AI will gain a competitive edge in the market by delivering more relevant, personalized, and impactful advertising experiences to their target audience. Consequently, AI-driven advertising solutions are expected to contribute significantly to overall market growth in the MENA region.

#### Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. The growth of the MENA advertising market was positively impacted due to COVID-19 pandemic, as people shifted their activities to the internet, increasing the popularity of digital advertising and resulting in a surge in e-commerce, social media usage, and online video consumption, presenting lucrative opportunities for advertisers. Also, advertisers started to prioritize cost-effectiveness, searching for specific and quantifiable advertising strategies. This resulted in an increase in programmatic advertising, a method that utilizes automation to enhance ad purchases, augmenting the growth of MENA advertising market.

#### Competitive Landscape:

The MENA advertising market is highly fragmented, involving a range of players from different sectors and countries in the area. The key players of the market are:

Omnicom Group Inc. (TBWARAAD)  
Multiply Group PJSC (BackLite Media LLC)  
Tonic International  
Dooha Media  
Mars Media Group

Bates Pan Gulf (BPG Group)  
3Points Advertising Company  
Maat Marcom Agency  
Advertising Ways Company

MBC is the biggest producer of premium Arabic television content globally, which allows it to control around 45% share of the TV advertising market in MENA and develop MENA's largest OTT platform. MBC Group is the broadcaster in the MENA region with the largest TV audience share in Saudi Arabia, Egypt, Iraq and Morocco. There are only two listed companies within the Saudi Media space, the outdoor advertising company ACSC (Al Arabia) and digital print advertising company SRMG (not covered by the Street). MBC Group owns a 20% stake in Saudi Arabia's largest outdoor advertising company Al Arabia. Moreover, Arabian Contracting Services Company (ACSC or Al Arabia) is the largest outdoor advertising company in Saudi Arabia, accounting for more than half of the share of the Saudi out-of-home advertising market. Al Arabia offers a full cycle of outdoor advertising services, including the construction of billboards, sale of advertising inventories, design of marketing campaigns, ads printing and billboard maintenance.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

#### 2.1 Advertising: An Overview

##### 2.1.1 Definition of Advertising

##### 2.1.2 Advantages Of Advertising

#### 2.2 Advertising Segmentation: An Overview

##### 2.2.1 Advertising Segmentation

### 3. MENA MARKET ANALYSIS

#### 3.1 MENA Advertising Market: An Analysis

##### 3.1.1 MENA Advertising Market: An Overview

##### 3.1.2 MENA Advertising Market by Value

##### 3.1.3 MENA Advertising Market by Channel (Digital, Television, Outdoor, Newspaper, Magazine, and Others)

##### 3.1.4 MENA Advertising Market by Region (Saudi Arabia, UAE, Egypt, Kuwait, Qatar, and Rest of MENA)

#### 3.2 MENA Advertising Market: Channel Analysis

##### 3.2.1 MENA Advertising Market by Channel: An Overview

##### 3.2.2 MENA Digital Advertising Market by Value

##### 3.2.3 MENA Digital Advertising Market by Region (Saudi Arabia, UAE, Egypt, Kuwait, Qatar, and Rest of MENA)

##### 3.2.4 MENA Television Advertising Market by Value

##### 3.2.5 MENA Outdoor Advertising Market by Value

##### 3.2.6 MENA Newspaper Advertising Market by Value

##### 3.2.7 MENA Magazine Advertising Market by Value

##### 3.2.8 MENA Other Advertising Market by Value

### 4. REGIONAL MARKET ANALYSIS

#### 4.1 Saudi Arabia Advertising Market: An Analysis

##### 4.1.1 Saudi Arabia Advertising Market: An Overview

##### 4.1.2 Saudi Arabia Advertising Market by Value

##### 4.1.3 Saudi Arabia Digital Advertising Market by Value

#### 4.2 UAE Advertising Market: An Analysis

- 4.2.1 UAE Advertising Market: An Overview
- 4.2.2 UAE Advertising Market by Value
- 4.2.3 UAE Digital Advertising Market by Value
- 4.3 Egypt Advertising Market: An Analysis
  - 4.3.1 Egypt Advertising Market: An Overview
  - 4.3.2 Egypt Advertising Market by Value
  - 4.3.3 Egypt Digital Advertising Market by Value
- 4.4 Kuwait Advertising Market: An Analysis
  - 4.4.1 Kuwait Advertising Market: An Overview
  - 4.4.2 Kuwait Advertising Market by Value
  - 4.4.3 Kuwait Digital Advertising Market by Value
- 4.5 Qatar Advertising Market: An Analysis
  - 4.5.1 Qatar Advertising Market: An Overview
  - 4.5.2 Qatar Advertising Market by Value
  - 4.5.3 Qatar Digital Advertising Market by Value
- 4.6 Rest of MENA Advertising Market: An Analysis
  - 4.6.1 Rest of MENA Advertising Market: An Overview
  - 4.6.2 Rest of MENA Advertising Market by Value
  - 4.6.3 Rest of MENA Digital Advertising Market by Value

## **5. IMPACT OF COVID-19**

- 5.1.1 Impact of COVID-19 on MENA Advertising Market
- 5.1.2 Post COVID-19 Impact

## **6. MARKET DYNAMICS**

- 6.1 Growth Drivers
  - 6.1.1 Economic Growth and Market Expansion
  - 6.1.2 Growing Young and Tech-savvy Population
  - 6.1.3 Rising Mobile Subscription
  - 6.1.4 Augmenting Social Media Users
  - 6.1.5 Expansion of Marketing Agencies
  - 6.1.6 Government Support
  - 6.1.7 E-commerce Expansion
- 6.2 Challenges
  - 6.2.1 Infrastructure Gaps
  - 6.2.2 Diverse Market Dynamics
- 6.3 Market Trends

- 6.3.1 Rise in Augmented Reality (AR) and Virtual Reality (VR)
- 6.3.2 Influencer Marketing
- 6.3.3 Rise of Digital Out-of-Home Advertising
- 6.3.4 Integration of AI in MENA Advertising
- 6.3.5 Programmatic Advertising
- 6.3.6 Rise of Localized Content
- 6.3.7 Video Content Dominance
- 6.3.8 Sustainability and Social Responsibility

## **7. COMPETITIVE LANDSCAPE**

- 7.1 MENA Advertising Market Players: Competitive Landscape

## **8. COMPANY PROFILES**

- 8.1 Omnicom Group Inc. (TBWARAAD)
  - 8.1.1 Business Overview
  - 8.1.2 Revenue by Geographical Region
  - 8.1.3 Business Strategy
- 8.2 Multiply Group PJSC (BackLite Media LLC)
  - 8.2.1 Business Overview
  - 8.2.2 Operating Segments
  - 8.2.3 Business Strategy
- 8.3 Tonic International
  - 8.3.1 Business Overview
- 8.4 Dooha Media
  - 8.4.1 Business Overview
- 8.5 Mars Media Group
  - 8.5.1 Business Overview
- 8.6 Bates Pan Gulf (BPG Group)
  - 8.6.1 Business Overview
- 8.7 3Points Advertising Company
  - 8.7.1 Business Overview
- 8.8 Maat Marcom Agency
  - 8.8.1 Business Overview
- 8.9 Advertising Ways Company
  - 8.9.1 Business Overview



## List Of Figures

### LIST OF FIGURES

Figure 1: Advantages Of Advertising

Figure 2: Advertising Segmentation

Figure 3: MENA Advertising Market by Value; 2019-2023 (US\$ Billion)

Figure 4: MENA Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 5: MENA Advertising Market by Channel; 2023 (Percentage, %)

Figure 6: MENA Advertising Market by Region; 2023 (Percentage, %)

Figure 7: MENA Digital Advertising Market by Value; 2019-2023 (US\$ Billion)

Figure 8: MENA Digital Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 9: MENA Digital Advertising Market by Region; 2023 (Percentage, %)

Figure 10: MENA Television Advertising Market by Value; 2019-2023 (US\$ Billion)

Figure 11: MENA Television Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 12: MENA Outdoor Advertising Market by Value; 2019-2023 (US\$ Million)

Figure 13: MENA Outdoor Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 14: MENA Newspaper Advertising Market by Value; 2019-2023 (US\$ Million)

Figure 15: MENA Newspaper Advertising Market by Value; 2024-2029 (US\$ Million)

Figure 16: MENA Magazine Advertising Market by Value; 2019-2023 (US\$ Million)

Figure 17: MENA Magazine Advertising Market by Value; 2024-2029 (US\$ Million)

Figure 18: MENA Other Advertising Market by Value; 2019-2023 (US\$ Million)

Figure 19: MENA Other Advertising Market by Value; 2024-2029 (US\$ Million)

Figure 20: Saudi Arabia Advertising Market by Value; 2020-2023 (US\$ Billion)

Figure 21: Saudi Arabia Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 22: Saudi Arabia Digital Advertising Market by Value; 2021-2023 (US\$ Billion)

Figure 23: Saudi Arabia Digital Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 24: UAE Advertising Market by Value; 2020-2023 (US\$ Billion)

Figure 25: UAE Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 26: UAE Digital Advertising Market by Value; 2021-2023 (US\$ Million)

Figure 27: UAE Digital Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 28: Egypt Advertising Market by Value; 2020-2023 (US\$ Million)

Figure 29: Egypt Advertising Market by Value; 2024-2029 (US\$ Billion)

Figure 30: Egypt Digital Advertising Market by Value; 2021-2023 (US\$ Million)

Figure 31: Egypt Digital Advertising Market by Value; 2024-2029 (US\$ Million)

Figure 32: Kuwait Advertising Market by Value; 2020-2023 (US\$ Million)

Figure 33: Kuwait Advertising Market by Value; 2024-2029 (US\$ Million)

Figure 34: Kuwait Digital Advertising Market by Value; 2021-2023 (US\$ Million)

Figure 35: Kuwait Digital Advertising Market by Value; 2024-2029 (US\$ Million)

- Figure 36: Qatar Advertising Market by Value; 2020-2023 (US\$ Million)
- Figure 37: Qatar Advertising Market by Value; 2024-2029 (US\$ Million)
- Figure 38: Qatar Digital Advertising Market by Value; 2021-2023 (US\$ Million)
- Figure 39: Qatar Digital Advertising Market by Value; 2024-2029 (US\$ Million)
- Figure 40: Rest of MENA Advertising Market by Value; 2020-2023 (US\$ Billion)
- Figure 41: Rest of MENA Advertising Market by Value; 2024-2029 (US\$ Billion)
- Figure 42: Rest of MENA Digital Advertising Market by Value; 2021-2023 (US\$ Billion)
- Figure 43: Rest of MENA Digital Advertising Market by Value; 2024-2029 (US\$ Billion)
- Figure 44: Middle East GDP per Capita: 2018-2024 (US\$ Thousand)
- Figure 45: MENA Population by Age; 2020 Census (Percentage,%)
- Figure 46: Middle East and North Africa Mobile Subscription: 2022-2029 (Million)
- Figure 47: UAE Number of Social Media Users: 2020-2029 (Million)
- Figure 48: MENA AR and VR Revenue; 2018-2028 (US\$ Million)
- Figure 49: MENA Ad Spending in the Influencer Advertising; 2024-2029 (US\$ Million)
- Figure 50: Omnicom Group Inc. Revenue by Geographic Region; 2023 (Percentage, %)
- Figure 51: Multiply Group PJSC Revenue by Segments; 2023 (Percentage, %)

## I would like to order

Product name: MENA Advertising Market: Analysis By Channel (Digital, Television, Outdoor, Newspaper, Magazine, Others), By Region (Saudi Arabia, UAE, Egypt, Kuwait, Qatar and Rest of MENA) Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2029

Product link: <https://marketpublishers.com/r/M6E91D0D4603EN.html>

Price: US\$ 2,250.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/M6E91D0D4603EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970