

# IAB MENA General Assembly

21 February 2024

Release version excludes Finance &  
Membership update

## Agenda - Approval & Additions

<b>Time</b>	<b>Agenda Item</b>	<b>Speakers</b>
10:00	Call Meeting to Order, Quorum & Approval of Agenda	Ian Manning, Olia Kostova
10:10	IAB MENA Board Chair Welcome	Michel Malkoun
10:15	2023 Highlights & 2024 Plans	Ian Manning, Mohamad Itani, Houda Tohme, Chris Solomi, Ayman Haydar
11:00	<del>Financial &amp; Membership Review</del>	<del>Ian Manning</del>
11:10	2023 Adspend Study	Dr Daniel Knapp
11:35	Election of 2024-26 Board of Directors	
11:45	Industry Hot Topics	Ian Manning, Michel Malkoun
12:00	Close & Networking	

# Board Chair's Address



Michel Malkoun  
IAB MENA Board Chair

# Our Vision and Mission remain clear

## VISION

**To be the catalyst for growing the MENA digital Advertising economy by Nurturing the community, accelerating knowledge sharing and establishing accountability standards that cultivate trust and credibility**

## MISSION

Positively influence corporate leaders & policymakers to value diversity & inclusion as a key currency for the growth of the digital economy in the GCC through awareness initiatives and enabling thought-starting conversations between our members and partners.

Collaborate with the industry on the development of unbiased digital learning & development programs to expand the market's understanding of how digital best practices drive their business success.

Become the authority in setting up the standards of measurement, research & attribution for the industry for the benefit of industry growth, trust and sustainability.

Inspire innovation and partnerships to support the development of a world- class, contemporary ecosystem of marketing solutions and services in MENA.

# Delivered on our 2023 priorities

1.

Drive Increased Membership Value

- 17 x videos
- 4 x events
- 4 x Research surveys
- 3 x whitepapers
- 2 x webinars
- 2 x Q&A
- 1 x Podcast
- 20 Free tickets to paid event

2.

Drive New Memberships for Sustainability & Increased Ecosystem Representation

17 new members onboarded

Across ecosystem  
eg: Audio, DOOH,  
CTV, Gaming

3.

Establish Delivery Cadence for Predictable Outputs

7 active taskforces

Quarterly events

55 member mailers

*More work to do on setting & keeping to delivery calendar*

4.

Increase Professionalism & Stability for Trusted & Sustainable Association

Updated Member agreement & NDA

Ongoing process reviews & improvements

# 2024 development areas aimed at broader regional value and devolving more leadership to members

1

## Go Deep

Foundational work in place in many cases - challenge is to dive deeper into topics and insights (eg: in TF plans and Adspend Survey)

2

## Go Local

Actively seeking non-dubai members

Plans for local councils to advise on local issues

Local breakouts from Insights team and in Adspend Survey

3

## Member Led

More opportunity for members to lead in Taskforces, including working groups - less reliance on board members

Thank you to our members for your support. Going forward, I ask you...

Get involved in  
Taskforces

Encourage your teams to get involved in one of our 10 task forces to increase quality and credibility of our outputs

Get involved - really engage

Distribute through  
your org

Use our resources in your work and with your people - share what we have done through your organisation

Legitimise our collective efforts

Contribute to the  
Adspend Survey

Share your expertise, insights & spends to improve the accuracy and depth of the Adspend Survey

Help shape the market positioning

Be an Advocate  
for the IAB MENA

Encourage your ecosystem, suppliers and clients to join us in driving industry progress and growth

We all thrive through ecosystem support

Thanks to the current board companies and individuals for their support, time and dedication



Choueiri Group



**MEDIABRANDS**





# Review of 2023 Preview of 2024



Ian Manning  
IAB MENA Exec Director

# Task forces are the heart of the IAB

**Description:** Made up of subject matter experts from our members to drive and execute specific initiatives and tasks. The Task forces vary in scale and duration of operation depending on the task, each having its own requirements depending on what the group wish to achieve together .

Members are invited to join these task forces at any time during their operations to contribute to delivering initiatives, knowledge and insights that benefit the whole industry. A unique opportunity for personal growth and business insights. Today we have over 59 companies and 167 people involved.

**Meetings:** Typically most TF's meet every 2 weeks for 45mins on a Tuesday or Thursday afternoon

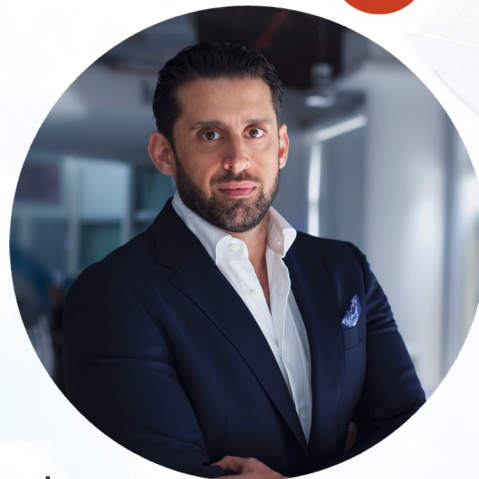
## **Change for 2024:**

- TF's can be led by non-board members (General Membership) - accountable to Board on output
- TF's can include more than 2 from one company, but no more than 20% can be from one company
- All TF members must attend and contribute - Actions & Outputs - no passengers

# 10 task forces for 2024, up from 7 in 2023 with huge industry engagement

Taskforce	Objective	Companies	Individuals
<b>TOTAL</b>		<b>59</b>	<b>167</b>
<b>Adtech</b>	Focus on driving knowledge of the Adtech ecosystem, helping to deliver a more robust local marketplace by supporting the development and growth of the ecosystem while maintaining standards and global best practices.	<b>15</b>	<b>17</b>
<b>Audio</b>	Drive increased knowledge of Audio opportunities to place Audio among the main channels for consideration for advertisers in the region. In 2024 we will do this through the production of a comprehensive Guide to Audio Advertising in MENA.	<b>4</b>	<b>5</b>
<b>CTV</b>	Focused on the channel development of CTV in the MENA region, to define its place among traditional TV advertising, programmatic video, OTT, and connected TV.	<b>15</b>	<b>25</b>
<b>DOOH</b>	Understand the current state of DOOH & pDOOH thus creating the opportunity of transformation for OOH. Focus on the ecosystem of DOOH from supply, planning, activation & measurement by engaging with the relevant stakeholders to tackle challenges and opportunities.	<b>17</b>	<b>24</b>
<b>Mixed Reality</b>	Aim to demystify and simplify the area of VR, AR, Metaverse and Gaming. Providing practical insights into tangible and current opportunities in this space.	<b>11</b>	<b>16</b>
<b>Retail Media</b>	The Taskforce aims to provide a view on the current and potential landscape, benefits of retail media to retail brands and advertisers, use cases and best practices.	<b>10</b>	<b>14</b>
<b>DEI</b>	Helping the industry and our members understand the value of diversity and inclusion better, implement programmes more effectively and maximise the talent pool through attracting and retaining diverse talent.	<b>12</b>	<b>17</b>
<b>L&amp;D</b>	Focused on bridging the gap between inhouse programmes, supplier programmes, institutions and the needs of the market. This team is focused on leveraging the existing industry knowledge and surfacing it to a wider audience.	<b>9</b>	<b>13</b>
<b>Insights</b>	Obtain and share insights about the digital ad market in MENA, and deepen understanding of the industry for IAB members and the local ecosystem.	<b>14</b>	<b>20</b>
<b>Measurement</b>	Tackle challenges around measurement in the market. Exploring opportunities to adapt and implement global best practices, taking into consideration market constraints. The focus this year will be on Measurement in a Data-private environment	<b>23</b>	<b>33</b>

# Channel Committee's Task Force Highlights and Plans



Mohamad Itani  
IAB MENA Committee Chair

# CTV - 2023 Highlights

## Objective:

Focused on the channel development of CTV in the MENA region, to define its place among traditional TV advertising, programmatic video, OTT, and connected TV.

## Highlights:



Whitepaper



Event



CTV AdDays Panel

# CTV - 2024 Next Steps

**Project:** Review of how CTV was leveraged during Ramadan

**Output:** Video recorded podcast

**Timing:** Late Q2

**Task Force:- 14 Group companies**

Aleph	Equativ	OSN
ArabyAds	Ipsos	Publicis Media Groupe
Augustus Media	MBC / MMS	Teads
Choueiri Group   DMS	MCN   UM	TNC Group   Mediamatic
GroupM	OMG	

Share examples of how you  
are using CTV for Ramadan

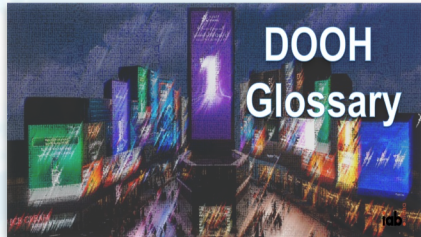
# DOOH - 2023 Highlights

## Objective:

Understand the current state of DOOH & pDOOH thus creating the opportunity of transformation for OOH. Focus on the ecosystem of DOOH from supply, planning, activation & measurement by engaging with the relevant stakeholders to tackle challenges and opportunities.

## Highlights:

DOOH Glossary



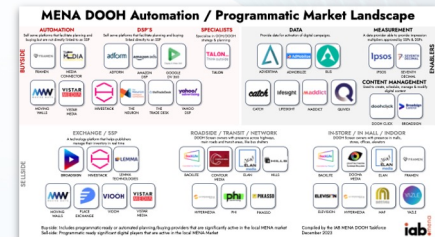
Podcast

Landscape Video



Whitepaper

Best practice Video



ECOScape

# DOOH - 2024 Next Steps

Help attract Adtech and pDOOH vendors to IAB / Taskforce

**Project:** Produce a Guide to Programmatic Digital OOH to help both buyers and sellers better understand the opportunity, the requirements for success and identify active ecosystem players to drive the market

**Output:** Written guide and launch event

**Timing:** May

## Task Force:- 14 Group companies

Amazon	Ipsos	Talon MENA
Backlite	MCN	TNC Group   Mediamatic
Choueiri Group	OMG	The Trade Desk
GroupM	Publicis Media Groupe	W Group   Hypermedia
Havas	Seventh Decimal	

Contents
Introduction
Scale of the market
Ecosystem
How it works
pDOOH benefits to publishers
Implementation requirements for publisher
pDOOH benefits to buy-side
Planning and implementation of pDOOH
Available Formats
Measurement and attribution
Attitudes to pDOOH from buyside and sellside
Future



# Mixed Reality (AR/VR/Gaming) - 2023 Highlights

## Objective:

Aim to demystify and simplify the area of VR, AR, Metaverse and Gaming. Providing practical insights into tangible and current opportunities in this space.

## Highlights:

### Member Q&A series called Reality Check

**Part 1:**  
Evaluates the state of readiness in MENA today to capitalize on the mixed reality opportunity.



**Reality Check by IAB MENA**  
Part 1  
October 2023

As the level of computing power continues to rapidly advance, MENA consumers now engage with a variety of immersive, digital experiences through their mobile devices and hardware on a daily basis. In 2022, the marketing and advertising world witnessed an explosion of headlines, big predictions and hype on all things AR, VR, Mixed reality and Web3.

In 2023, so far we have seen the launch of a Metaverse academy in Riyadh, Majid Al Futum launching their Mall of the Metaverse, Bain is forecasting the metaverse could be a \$100bn business by 2030...but what now?

IAB MENA has brought together a group of industry thought leaders from our membership to do a 'Reality Check', to get their perspectives on the implications of mixed reality on our industry, covering practical considerations such as, 'who should own Web3' and mixed reality within companies, agencies and marketing functions and if we see any real-world success that we can learn from. In the first of this 2-part series of Reality Check, hear about the state of readiness in MENA today to capitalize on the mixed reality opportunity.

With all emerging technology, there is often a challenge when it comes to the question of 'who should own' it within a given organization. Who do you think should own the testing, development and potential implementation of 'Mixed Reality'?

**iab**  
Anthony Njirayani - Omnicom Media Group

Asking who will own Web3 is like asking who owns the internet. In today's early stages, tech giants and specialized companies or startups should champion the development and improvement of hardware and software to increase adoption across Web3 /mixed reality services. Without mass adoption, the opportunity for advertisers and agencies will remain minimal. On top of that, every new ad product that emerges from the advancements in mixed reality and Web3 must pass the effectiveness test to become one of the pillars of the media mix, including the ability to reach a

Reality Check by IAB MENA Part1, October 2023

**Part 2:**  
Reveals the current state of mixed reality, looking at case studies, measurement and the impact on marketing process and talent development.



**Reality Check by IAB MENA**  
Part 2  
October 2023

In part 2 of our series on Mixed Reality, we cover the current state of mixed reality in MENA, looking at completed case studies, the challenges of measurement and the impact accessible mixed reality will have on the marketing process and on talent development.

Reality Check is a 2-part series brought to you by IAB MENA members and aims to provide a hands-on, practical perspective on the implications of mixed reality on our industry.

**iab** What are current, tangible success stories in MENA?

Joanne Chahab - TB Tek

Exploring current, tangible success stories in MENA, it's evident that AR has found widespread adoption across various industry verticals: from TRX, gaming, beauty, fashion, travel, retail, F&B, and more. A compelling example of AR's impact materialized within the beauty and luxury sector, where AR technology played a pivotal role in driving product trials and raising awareness during the launch of a new lipstick line for a prominent brand. With a simple hand gesture, over 60,000 users virtually tried on different lipstick shades, resulting in an impressive 13% increase in brand awareness and a 6% boost in brand recall. This early triumph served as a catalyst for AR's expansion across diverse industries, with the current spotlight on Travel & Tourism.

These success can be attributed to [1] the creative direction or choice of experience; [2] the multi-dimensional marketing strategy (i.e., how the effect is rolled out, how creators engage with it and encourage community participation, and which ad solutions are leveraged to drive business KPIs); and [3] the platform itself, as our user experience is centered around measure engagement and virality.

Reality Check by IAB MENA Part2, October 2023

# Mixed Reality (AR/VR/Gaming) - 2024 Next steps

Share leads for gaming specialist companies to join the taskforce

**Project:** Produce a Guide to Gaming to help the market distinguish between gaming as an advertising opportunity and gaming audiences as an advertising opportunity

**Output:** Written guide to Gaming Opportunity in MENA

**Timing:** April

**Task force:- 10 Group companies**

Aleph	MCN
Division	OMG
GroupM	Publicis Media Groupe
Havas Media	Snap
Intren	Tik Tok

Content
Gaming Ecosystem
Gaming Audiences
Advertiser opportunities
Measurement
Case studies

# People Committee Highlights and Plans



Houda Tohme  
IAB MENA Committee Chair

# DEI - 2023 Highlights

## Objective:

Helping the industry and our members understand the value of diversity and inclusion better, implement programmes more effectively and maximise the talent pool through attracting and retaining diverse talent.

## Highlights:



DEI event



UNW Partnership



Unstereotype Alliance Ally

# DEI - 2024 Next Steps

Connect with partnership  
workstream & share WEP  
experiences

**Project:** Provide tools, insights and practical knowledge for the industry to embed the diversity, equity and inclusion agenda into their business operations and influence their work output.

**Output:** Events, networking roundtables

**Timing:** Ongoing

**Taskforce:- 12 Group companies**

Aleph	Havas Media	Tik Tok
Augustus	MCN	The Trade Desk
Equativ	OMG	MIQ
GroupM	Teads	Zefr

## Networking -

- Develop a series of networking opportunities for Women, including Coffee mornings with 'educational or inspirational' speakers.
- **Produce 1 x event**

## Partnerships -

- Identify and partner with organizations/ companies to **leverage existing activities** and to engaged them in our activities

## UN Women and Unstereotype Alliance -

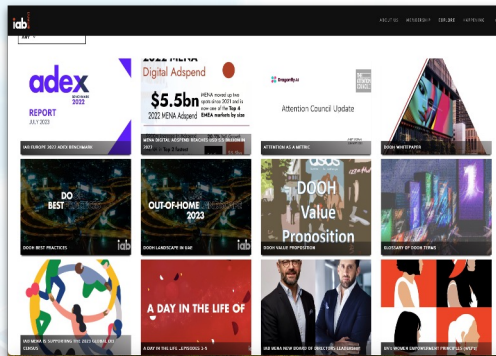
- Develop actions to support our partnership and drive **adoption of their frameworks**

# L&D - 2023 Highlights

## Objective:

Focused on bridging the gap between inhouse programmes, supplier programmes, institutions and the needs of the market. This team is focused on leveraging the existing industry knowledge and surfacing it to a wider audience.

## Highlights:



Knowledge Hub



MENAVoices...Day in the Life



Glossary

# L&D - 2024 Next Steps

Volunteer presenters and topics for webinar series

**Project:** 2 main immediate projects:

- 1) Survey the market to identify gaps and needs
- 2) Develop running webinar covering member led showcases: eg: insights, research soft skills, career skills and personal development

**Output:** Webinar series  
Survey to inform future actions

**Timing:** April - September

**Taskforce:- 18 Group companies**

Augustus	MCN
Dentsu	OMG
GroupM	Publicis Media
Havas Media	Seedtag

## Need Survey

- Gain deeper understanding of the needs of the industry - eg: AI training

## Member L&D webinar series

Agenda to be determined by the Taskforce - content vetted by IAB MENA

- Future-facing views and proactive ideas;
- Content that constructively explores industry challenges and opportunities;
- Learning, training, explainer content

# Measurement Committee Highlights and Plans



Christos Solomi  
IAB MENA Committee Chair



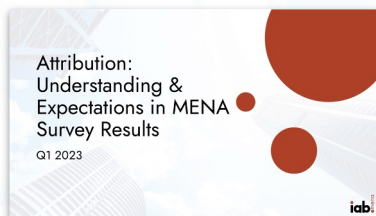
# Measurement - 2023 Highlights

## Objective:

Tackle challenges around measurement in the market. Exploring opportunities to adapt and implement global best practices, taking into consideration market constraints. **The focus in 2023 was on Attribution and Attention.**

## Highlights:

### Attribution Research



Attribution event

### Attention Webinar



Attention Guide

# Measurement - 2024 Next Steps

Encourage teams to fully engage to support each working group

**Project:** 2024 we will shift our focus to Measurement in a post cookie world around 3 pillars:

- 1) Data privacy
- 2) Measurement & Tracking
- 3) Identity & Targeting

**Output:** 3 x white papers  
1 x Event / webinar

**Timing:** 3 releases culminating in October event (release timing TBC)

## Taskforce:- 18 Group companies

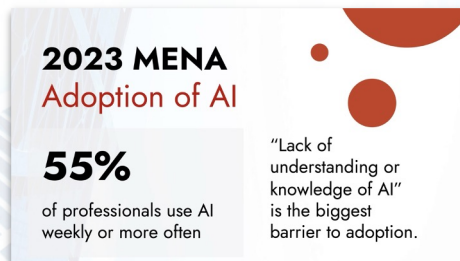
Amazon	Doubleverify	Meta
Archers	GroupM	Nielsen Media
Chain Reaction	Havas Media	OMG
Choueiri Group	Ipsos	Seedtag
Criteo	MCN	Snap
Dentsu	TNC Group   Mediamatic	The Trade Desk

# Insights - 2023 Highlights

## Objective:

Obtain and share insights about the digital ad market in MENA, and deepen understanding of the industry for IAB members and the local ecosystem.

**Highlights in 2023:** (2x Surveys also conducted as part of Attribution and CTV TF's)



AI Survey



Privacy Survey

# Insights - 2024 Next Steps

Help distribute surveys to increase respondents - particularly NA and KSA

**Project:** Ongoing quarterly 'sentiment' surveys with more focus on local inclusion in samples and local insights

## Outputs

### 1) Quarterly Market Surveys:

- **Trend:** Attitudes to Programmatic including CTV and DOOH deep dives
- **Market insight:** Saudi Deep Dive - Market specific deepdive, based on combined interviews and survey
- **Hot topic:** Retail Media and Shoppable Ads - Combined first party survey and desk research
- **Future gazing:** Audio and Gaming (combined survey)

### 1) Ongoing LinkedIn Surveys - gaining a 'pulse' on industry hot topics

## Taskforce:- 13 Group companies

Aleph

Augustus Media

Equativ

Google

GroupM

Havas

IPSOS

Nielsen Media

Promofix

Think Digital Group | Tailwind

Seedtag

Snap

TNC Group | Mediamatic

# New Task Forces for 2024



Ayman Haydar  
IAB MENA Board Member

# New Taskforce in 2024 - Adtech

Start by helping with info to develop the ECOScape

## Objective:

Focus on driving knowledge of the Adtech ecosystem, helping to deliver a more robust local marketplace by supporting the development and growth of the ecosystem while maintaining standards and global best practices.

**Project:** Produce a MENA Adtech ECOScape, adtech glossary and Supplier Capability audit. Once completed, build on this knowledge with more insights into eg: Impact of AI, Adfraud, post-cookie etc

**Timing:** H1

## Taskforce: 15 Group companies

Aleph

Augustus Media

Amazon

ArabyAds

Choueiri Group | DMS

Equativ

GroupM

Ipsos

MIQ

Seedtag

Tik Tok

Think Digital Group | Tailwind

Trade Desk

OLX / Dubizzle

Teads

# New Taskforce in 2024 - Audio

We need you to join the taskforce & help attract other Audio members

## Objective:

Drive increased knowledge of Audio opportunities to place Audio among the main channels for consideration for advertisers in the region.

**Project:** A comprehensive Guide to Audio Advertising in MENA. Potentially released in different chapters as a series

**Timing:** H1

**Taskforce: 4 founding companies**

Aleph

Choueiri Group

Next Broadcast Media

Publicis Media

Proposed Content
The Audio Opportunity in MENA
Formats
Value proposition to Advertisers
Risks and considerations
Key players in the Audio space
Audio and Ramadan
Measurement Considerations
Case Studies / best practices
Getting Started with Audio
Audio Glossary

# New Taskforce in 2024 - Retail Media

Help us attract Retail and  
Commerce companies to  
IAB MENA

## Objective:

Retail media and eCommerce are a fast growing and significant opportunity in MENA. The Taskforce aims to provide a view on the current and potential landscape, benefits of retail media to retail brands and advertisers, use cases and best practices.

## Project:

- August - Establish Glossary, Definitions and Lexicon for Retail Media
- November - Develop paper on benefits, process, requirements to successfully explore Retail Media in MENA - buy-side & sell side

## Taskforce: 8 Group companies

ArabyAds

Criteo

Google

Havas

Incubeta

OMG

Publicis Media

The Trade Desk



# 2024 Working Calendar



Ian Manning  
IAB MENA Exec Director

# 2024 Current Working Calendar

Jan 1	Jan 8	Jan 15	Jan 22	Jan 29	Feb 5	Feb 12	Feb 19	Feb 26	Mar 4	Mar 11 (ramadan)	Mar 18 (ramadan)	Mar 25 (ramadan)	
	DOOH ECOscope	CES highlights	Attention Whitepaper		Privacy Survey		General Assembly	New board announce					Adtech Ecoscope
Apr 1 (Ramadan)	Apr 8 (eid 8-12)	Apr 15	Apr 22	Apr 29	May 6	May 13	May 20	May 27	Jun 3	Jun 10	Jun 17 (eid 16th-19th)	Jun 24	
		Guide to Gaming		Attitudes to Program	Member L&D webinars		Guide to pDOOH		Adspend release		Member L&D webinar	Cannes highlights	
Jul 1	Jul 8	Jul 15	Jul 22	Jul 29	Aug 5	Aug 12	Aug 19	Aug 26	Sep 2	Sep 9	Sep 16	Sep 23	Sep 30
CTV - Ramandan Report		Audio and Gaming insights	Member L&D webinar		Day in Life videos	Retail Media Glossary/ definitions		Member L&D webinar	Day in Life videos	Guide to Audio	Member L&D webinar	Retail & Shoppable Media insight	
Oct 7	Oct 14	Oct 21	Oct 28	Nov 4	Nov 11	Nov 18	Nov 25	Dec 2	Dec 9	Dec 16	Dec 23	Dec 30	
Member L&D webinars	Measurement Event			Saudi Deep Dive insights		Guide to retail Media				end of year letter			

# Current planned Output Summary

## Whitepapers

pDOOH  
Adtech ECOScape  
Measurement x 3  
Audio  
Gaming  
Retail Media

## Events / Webinars

Adspend  
DEI Networking  
Measurement  
Retail Media (tbc)

## Podcasts/Videos

CTV  
Showcase / L&D

## New Insights

KSA Deepdive  
Retail Media  
Audio/Gaming  
Programmatic Attitudes

# 2023 Annual Adspend



Daniel Knapp  
Redefine Digital /  
IAB Europe Chief Economist

# Our study has firmly established itself as market compass



**campaign** Media for **Mindset.**

Latest ▾ Events ▾ Directory Podcast **Jobs** Magazine More ▾

ADVERTISING | DIGITAL | FEATURED | INSIGHTS | NEWS  
posted on Jun. 13, 2023 at 3:00 pm

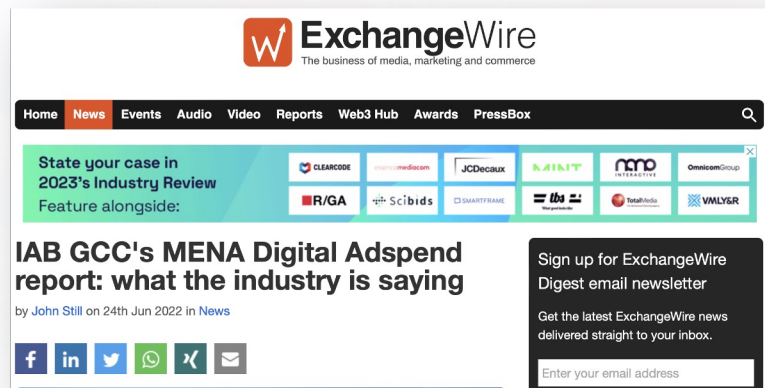
## UAE and KSA are fastest growing markets in EMEA

Ishwari Khata

**2022 MENA Digital Adspend**

Credits: IAB MENA

UAE and KSA are the fastest-growing markets in EMEA, IAB MENA reveals in its latest study.



**ExchangeWire**  
The business of media, marketing and commerce

Home **News** Events Audio Video Reports Web3 Hub Awards PressBox

State your case in 2023's Industry Review  
Feature alongside:

CLEARCODE | **clearmedcom** | JCDecaUX | **MINIT** | **mm** | OmnicomGroup  
R/GA | Scibids | SMARTFRAME | **the 24** | TotalMedia | **VMLYSR**

## IAB GCC's MENA Digital Adspend report: what the industry is saying

by John Still on 24th Jun 2022 in News

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## Independent project team



DR. DANIEL KNAPP

Chief Economist, IAB Europe,  
former advisor VP European  
Commission



ANDREW HAYWARD-  
WRIGHT

Former Head of Programmatic at  
The Guardian



ZHINI XIA

Former Analyst at IHS Markit &  
other market research institutes

# Geographic Coverage: Data from 16 markets in MENA

- Algeria
- Bahrain
- Egypt
- Iraq
- Jordan
- Kuwait
- Lebanon
- Libya
- Morocco
- Oman
- Palestine
- Qatar
- Saudi Arabia
- Tunisia
- United Arab Emirates
- Yemen



# The value of the Adspend Survey



**Provide actionable insights  
on growing the market**



**Benchmark individual  
markets across the  
region**



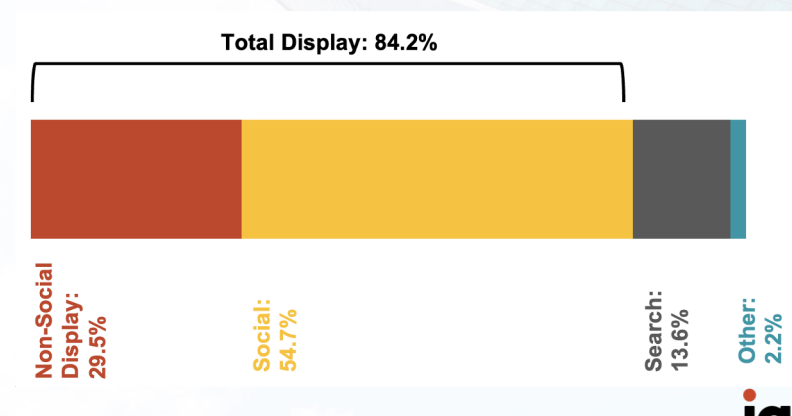
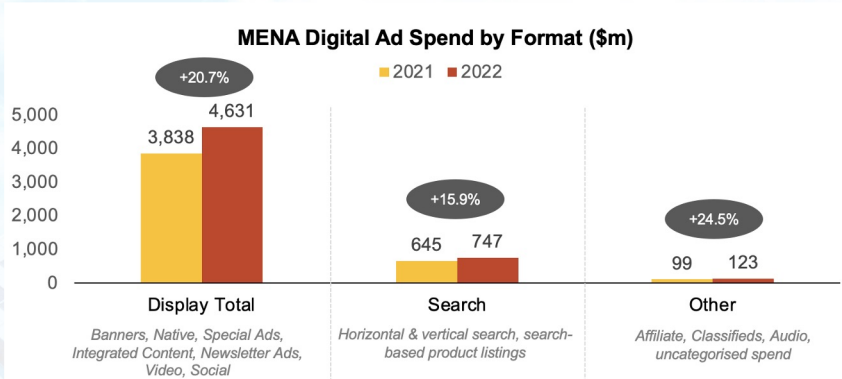
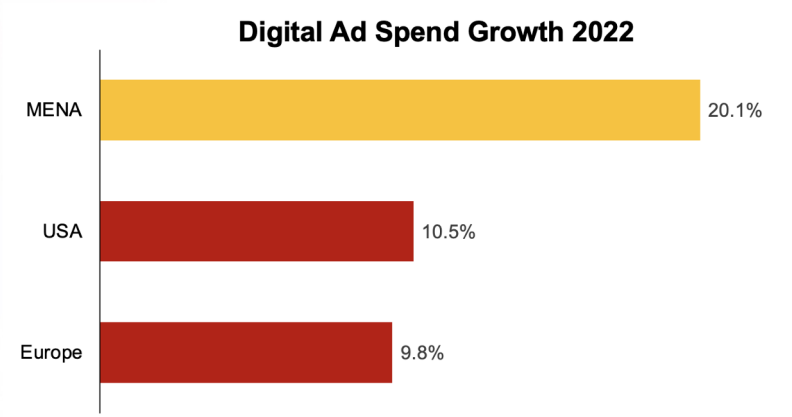
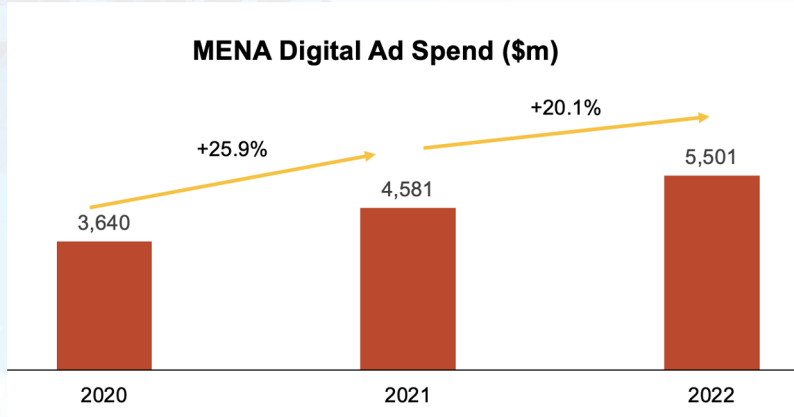
**Create a trusted  
environment for market  
investment**



**Link the MENA markets to  
the wider European  
market**



# Example of study of outputs



# Evolution of the study

2021

Initial  
Study

2022

Additional  
Details

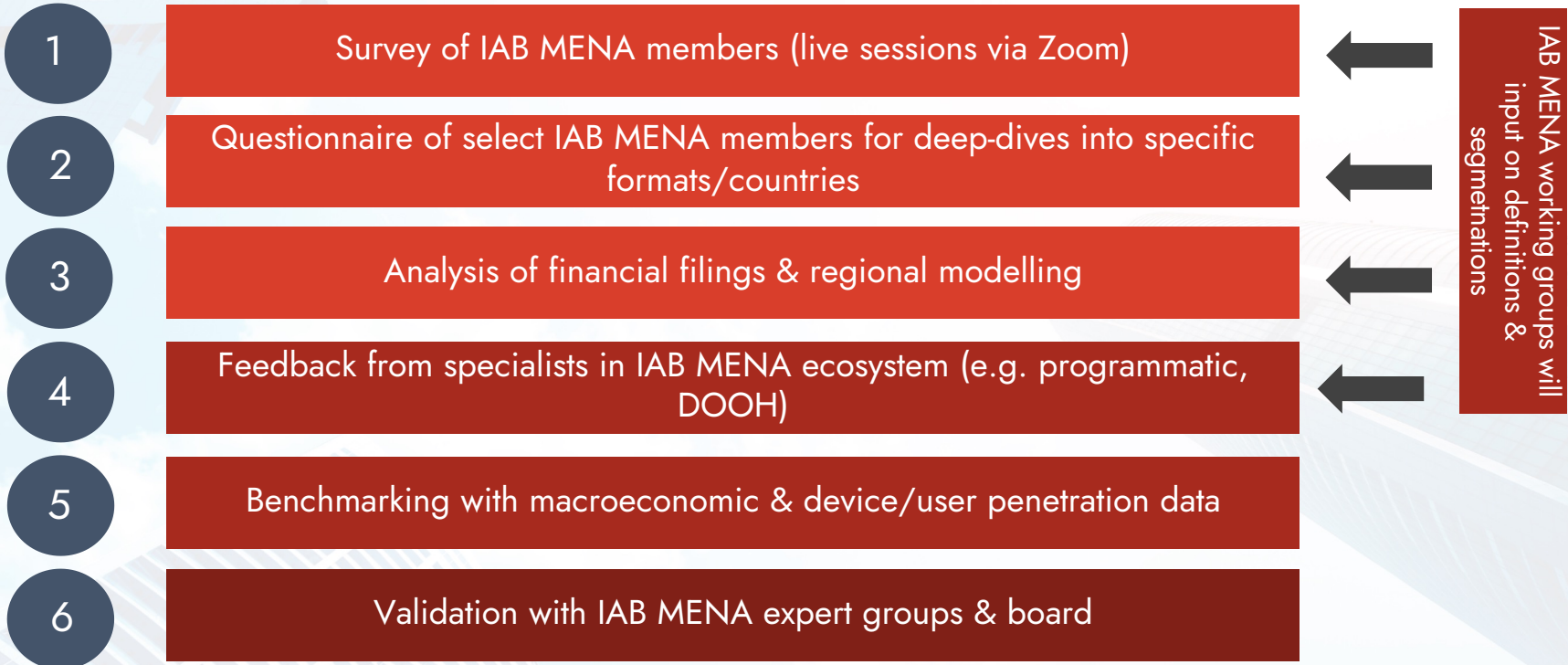
2023

Future-  
Proofing  
Breakouts

2024

Updated  
Method

# Overall approach



# Improvements and enhancements to approach

Type	Definitions	Survey	Working Sessions
Measure	<p>Guide of definitions relating to core formats and transaction mechanisms.</p> <p>Alignment on “commerce”, “shoppable” etc.</p>	<p>Main survey with reduced complexity to balance granularity &amp; ability to provide information.</p> <p>Break-out specialist qual &amp; quant surveys for programmatic, social, emerging formats.</p>	<p>Conduct interactive feedback session with key stakeholders at the beginning of the process where they feed back on macro-analysis.</p> <p>Further workshop ahead of board approval to align on numbers.</p>
Rationale	<p>Cross-stakeholder alignment on what we measure and IAB MENA standard.</p>	<p>Maximise feedback quantity &amp; quality. We kindly ask each relevant company to designate additional experts to speak to for each break-out.</p>	<p>Leverage quality of feedback from past board meeting on the numbers and make it integral part of the process.</p>

# More sources of data to add further accuracy

## Today

### SEC filings

Analysis of company filings, especially agencies & large platforms.

### Macro-economic model

Benchmarking vs other regions & macro indicators.

### 3<sup>rd</sup> party data benchmarking

Analysis of data from research institutes and press coverings.

## New Addition

### LLM company report analysis

Over last 2 quarters we have developed a system based on LLMs to read & classify information from 1,000s of companies.

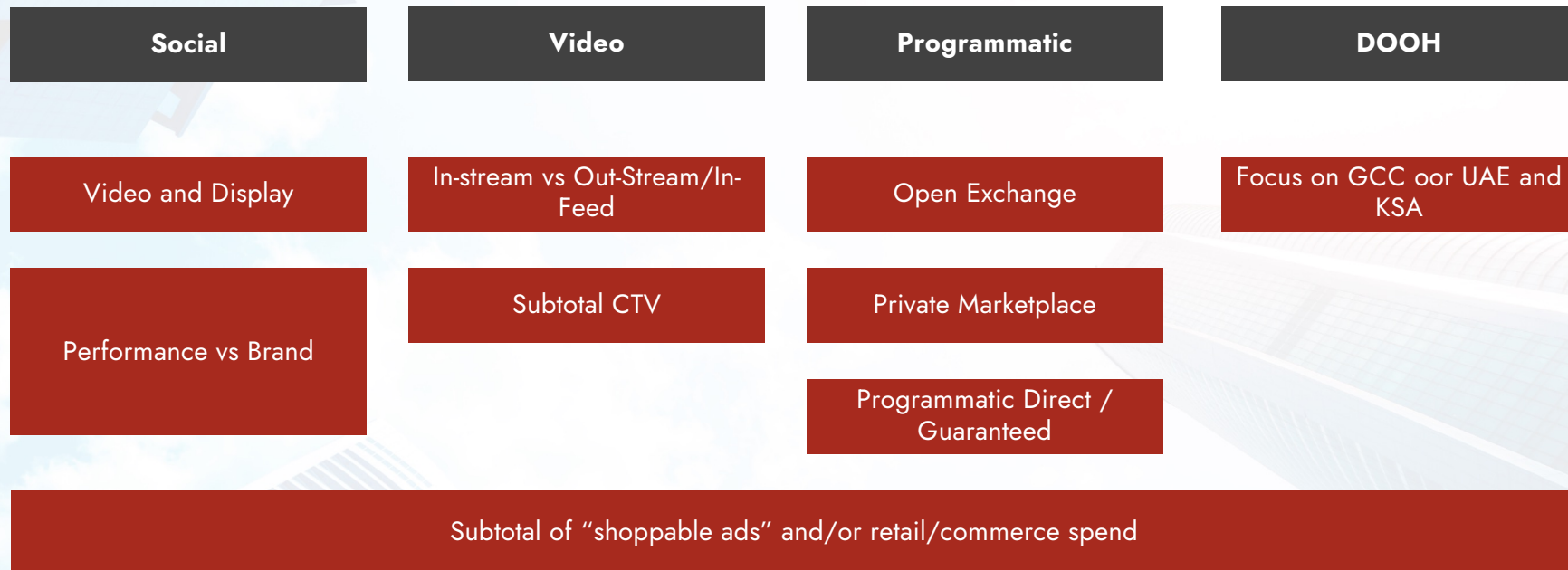
We can deploy this to identify any information relating to marketing & MENA.

### Planning tools & exhaust data

Use of media planning tools in self-serve platforms to gauge audience reach by country & ad format, prices.

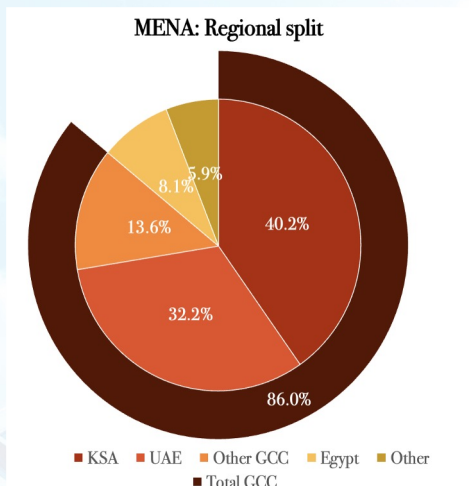
Use programmatic “exhaust data” from buying tools to validate transaction models.

# Overview: Coverage of formats



# Expansion of regional & local segmentations

## Current regional segmentation in IAB MENA Ad Spend Study



- We launched a regional and country splits 2 years ago.
- We will maintain the current split by country & region but add format breakouts

## Breakouts

*Year-on-Year Growth: For total by regional split, by format if data quality permits*

Video

Social

Other

Total

*Further details if data quality permits (see "costs")*

# Timeline

**February**

Macro  
economic  
estimate

**March**

Kick-off &  
requirement  
review with  
IAB MENA  
WGs

**March - May**

Interviews  
with Industry  
Stakeholders

**April - May**

Data  
Modelling

**Mid May**

Validation &  
Sign-Off  
with Expert  
Group

**Early June**

Dubai  
launch event



# It is easy to participate! We provide you with simple guides to get started

## Definitions

IAB MENA

### 2023 digital advertising market sizing study

#### Definitions:

100% domestic spend	MENA originating ad spend addressing domestic consumers
Agency spend	Total expenditure by advertising agencies on marketing and advertising campaigns across various channels to promote clients' products or services.
Brand advertising	Focused on building brand awareness and identity, creating a positive perception and emotional connection with the audience over time.
Commerce media	Native digital advertising leveraging data across all consumer shopping points, online and offline, for personalized ads at moments of high purchase intent.
Country spend definition	Where spend is booked vs where spend actually runs - clarify which one we are asking for.
CTV advertising	Advertisements through Connected TV devices, offering targeted, interactive ad experiences within the streaming content ecosystem.
Display advertising	Broad term that covers banner and video digital advertising in both social and non social channels.
DOOH advertising	Any OOH display that can change its advertising content remotely generally LCD or LED screens.
Export spend	MENA originating ad spend addressing consumers in other markets
Import spend	Ad spend from abroad addressing domestic consumers
In-banner video	Video placements within banner formats advertising using the VAST protocol
In-feed video	Videos appearing within content feeds of social media or websites, automatically playing as users scroll, for a seamless viewing experience. This is a subcategory of Outstream
In-stream video	Videos ads played before, during, or after video content, ensuring viewer engagement with non-interruptible content for a set time.
Non-Agency spend (Direct)	Direct spending by brands on advertising without advertising agencies, including self-serve platforms and in-house marketing efforts.
Outstream video	Video ads in non-video environments, playing automatically when in view and pausing or closing when scrolled past.
Performance advertising	Digital advertising with payment based on viewer actions like clicks or sales, focusing on measurable results and ROI.



## Survey Guide

IAB MENA

### 2023 digital advertising market sizing study

#### Survey & Interview Guide:

Thank you for participating in this year's IAB MENA market sizing study. In order to help facilitate improved responses to the survey and interview, we have produced a guide outlining the sections of the survey and how to respond to them along with suggested insights to help prepared for the following interview with the RE DEF team.

Like in other IAB ad spend exercises, a member survey is at the core of the study. To facilitate increased data access, in MENA, we consider either the submission of total market and format estimates or respondents can confidentially supply their own company investments, or ad revenues, as part of on total.

#### The survey

We have refined the main survey to be smaller and more specific to ensure that participants are able to provide quantitative insights.

The numbers submitted are your estimate of what you believe the market size was for 2023. Note they are **est** your own company numbers (see below for company submissions).

The survey has four main sections:

1. Totals: Section on total market size & growth. Split out between banner, video (non-social) and social.
2. Formats: Deep-dive on formats in both video and display.
3. Programmatic vs non-programmatic: exploring activation channels and the spend fluctuations. This section will also be supported by a workshop to deep dive into the area of programmatic.
4. Market indicators section that is designed to help provide further insight as to where spend is originating from. This section includes a view of agency vs non agency and will start to explore import and export spends. For this section of the survey we recommend reviewing the definition of agency vs direct spend ahead of the call and to consider macro and micro economic factors that you see at play in the industry.



## Interview Guide

IAB MENA

### 2023 digital advertising market sizing study

#### Interview Questions:

The following questions are designed to be thought starters and a guide for the 2024 IAB MENA market sizing study. We encourage you to read them and come to the interview with answers to these questions, they are not an exhaustive or prescriptive list of questions and interviews will likely follow their own natural flow of conversation.

#### Survey related questions:

- What was the total digital ad spend in the MENA region for 2023, and how does this compare to the previous year?
- What are the key factors driving the increase in digital ad spend in the MENA region?
- How is the digital ad spend in the MENA region distributed across different advertising formats such as social, search, and display?
- Which countries in the MENA region saw above-average growth in digital ad spend, and how did currency devaluation impact these figures?
- What percentage of the digital display ad spend is programmatic, and how has this changed from the previous year?
- How does the growth rate of digital ad spend vary across countries in the MENA region (e.g. UAE, KSA, GCC, other countries)?
- What are the future growth drivers for digital ad spend in the MENA region as identified in the presentation?
- How does the agency share of spend in the digital ad market compare between 2022 and 2023?
- What trends are observed in the types of digital ads, specifically in the growth of video ads compared to non-video display, social and search?
- How does the retail media landscape and e-commerce spend evolve in the MENA region?



## Request for Data

IAB MENA

### 2023 digital advertising market sizing study

#### Request for Actuals:

Following feedback during last year's interviews we are strongly encouraging participants to submit company actuals, these numbers are your own spend numbers and will only be accessible confidentially to the team at RE DEF and will be anonymized and aggregated to provide further validation from the economic modelling and surveys. **we actuals will be shared or published**

In order to ensure that your data remains secure and private RE DEF are offering different modes of sharing this:

1. Verbal only: Submission on your interview calls with the RE DEF team. This will be entered into a secure database and it will not be shared with any other organizations.
2. Submission via email: Email the provided excel to [submit@iabmna.ae](mailto:submit@iabmna.ae). Please do not email this information to any other contact.

The data will be stored on RE DEF's secure servers and will be kept isolated from the main survey submissions. This data will then be blended so that no one company's numbers will be identifiable. The data will be used to further assess check the survey submissions and the financial modelling. We will not be publishing any actual data submissions from companies.

#### The numbers for submission

Total Digital Spend/Revenue:

Definition - Spend that you run for impressions within the region including display banner & video as well as social. This also includes emerging channels such as DOOH and CTV.

Total Video spend/Revenue:

Definition - Including both in-stream and outstream, this should include youtube and social spend for video formats.

Total Display Banner spend/Revenue:

Definition - Running in the open web and into display placements.

Total Social spend:

Definition - This is for paid media social spend and does not include creator content

Total Search spend:

Definition - Paid for search across all digital channels.

Proportion of your spend/Revenue in digital vs other channels in print.



# We need you to participate

Calendly diary open for 1:1 interviews

Provide any public company numbers

Participate in the MENA work groups

Validate with Adspend committee



**Final market presentation**

# Election / Board Confirmation



Ian Manning  
IAB MENA Exec Director















## Nomination Rules

- Member Company holding **Premium Membership** and wishing to stand for election had to nominate itself
- Nomination is done per **member company not individuals**
- Nomination is recorded **per organization type** as indicated on the membership application form
- Groups are only entitled to one nomination per group
- Member Company standing for election had to nominate a representative in accordance with the criteria for Ideal Board Member Profile
- Nomination deadline was Feb 14th, on or before 5:00 pm











## Voting Rules

- Voting right are exercised by the authorized representative of the member company
- Authorized representative is either the Lead/Head/CEO of the member company or someone nominated by him as authorized representative
- Only members with valid Premium and General memberships have the right to vote
- Every voter shall cast as many votes as the number of available seats (15) for all organization types, i.e. 5 votes for each organization type.
- In the event the Lead/Head/CEO cannot attend and no authorized representative has been appointed prior to the election day, the member has no the right to vote











# Nominated Companies

Agency	5	Publisher   Media House	5	Tech   Research	4
	Group M		BackLite Media		Amazon
	Havas Media		Choueiri Group		ByteDance
	MCN		MBC		Google
	Omnicom Media Group		Rotana Media Services		Snap
	Publicis Media Group		W Group		Vacant Seat

# Automatically Elected Companies & Nominated Board Representatives Agencies

Agency	Board Member	Board Representative
	<b>Group M</b>	 Clare Fearon
	<b>Havas Media</b>	 Houda Tohme
	<b>MCN</b>	 Ziad Chalhoub
	<b>Omnicom Media Group</b>	 Chris Solomi
	<b>Publicis Media Group</b>	 Elie Milan


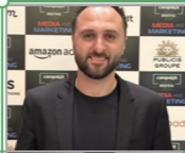






# Automatically Elected Companies & Nominated Board Representatives Publishers | Media Houses

Publisher   Media House	Board Member	Board Representative
 Desirable by Design®	<b>BackLite Media</b>	 James Bicknell
 Choueiri Group	<b>Choueiri Group</b>	 Michel Malkoun
 MBC GROUP	<b>MBC</b>	 Jad Saab
 Rotana Media Services	<b>Rotana Media Services</b>	 Nisrine Ghazal
 HYPERMEDIA   DIGITAL	<b>W Group</b>	 Ayman Haydar

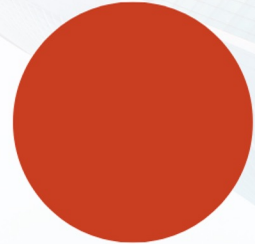
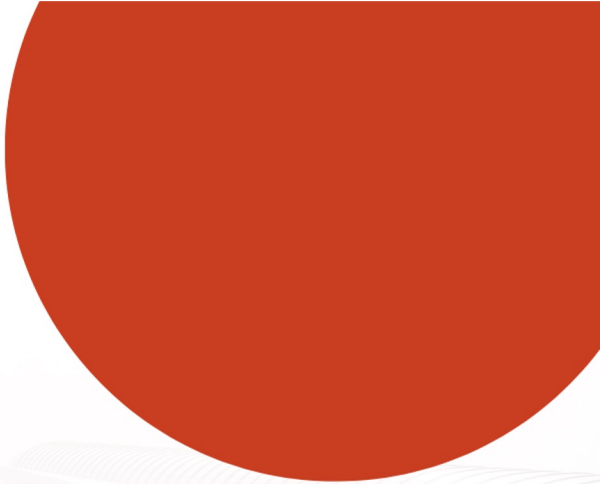


# Automatically Elected Companies & Nominated Board Representatives

## Tech | Research

Tech   Research	Board Member	Board Representative
	Amazon	 Wassim El Jamal
	ByteDance	 Joanne Chehab
	Google	 Sebastian Joziassse
	Snap	 Rasha El Ghossaini

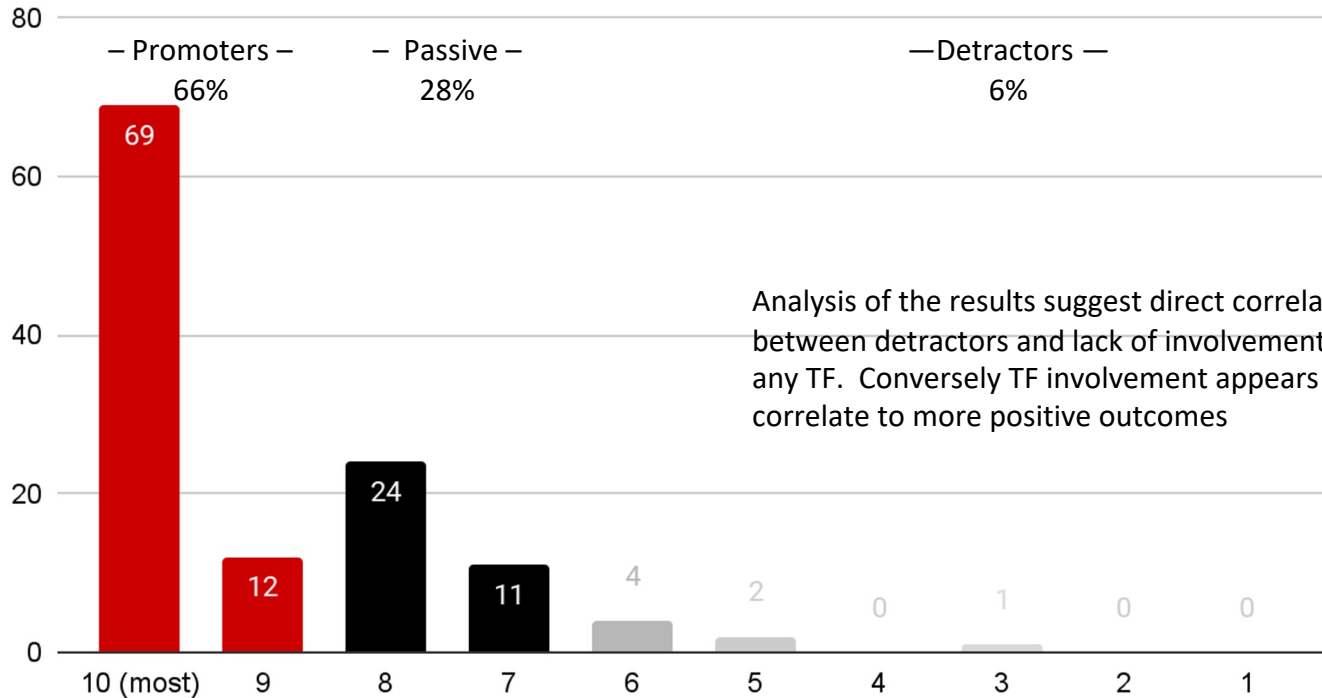
# Hot Topics / Your perspective Discussion



Ian Manning/Michel Malkoun/Houda Tohme/Mohamad Itani  
Ayman Haydar/Chris Solomi/Daniel Knapp

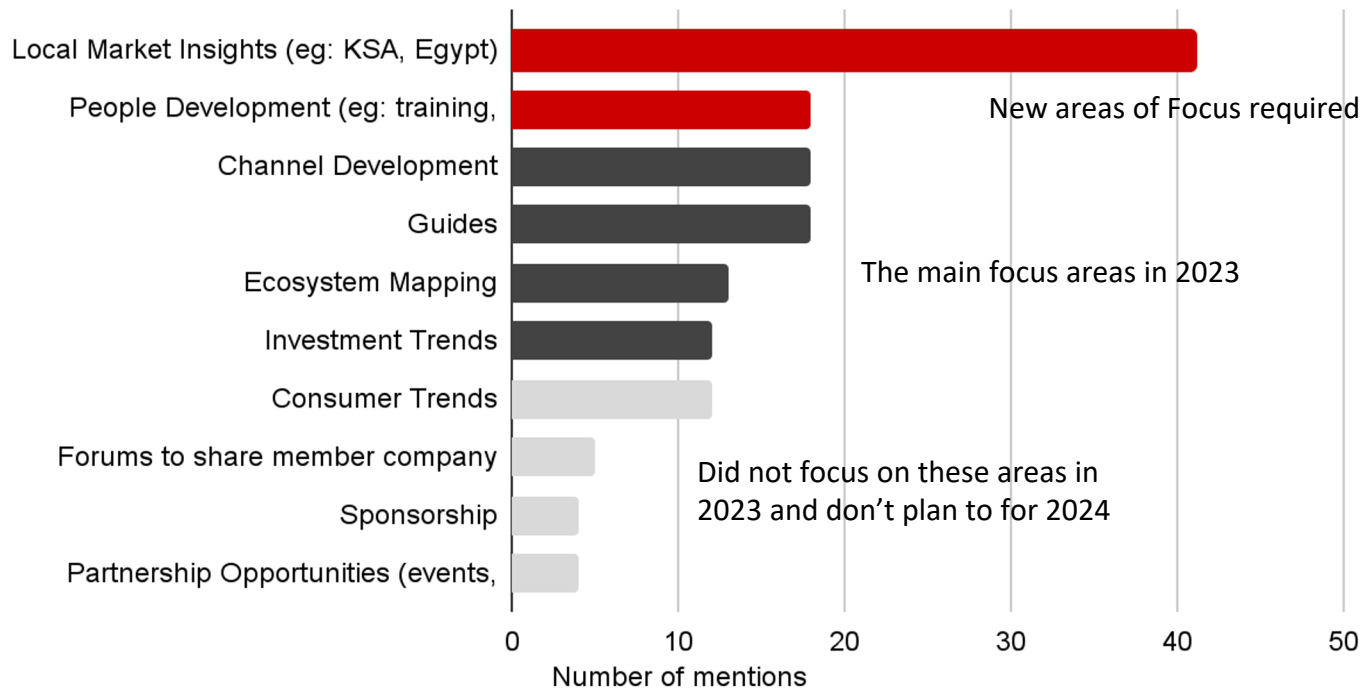
# Members are very positive about our efforts

## How likely are you to recommend IAB MENA Membership?



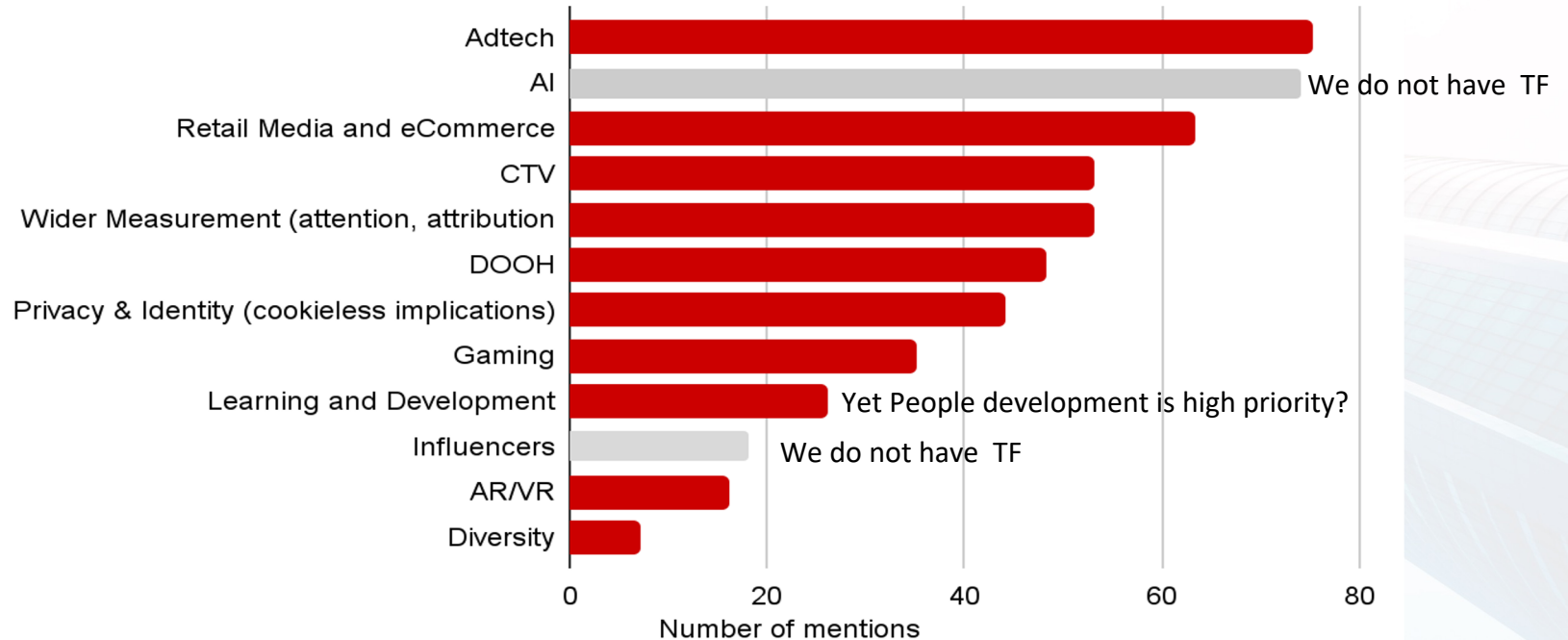
# Need for more localised content and insights, People & Channel Development

What broad areas do you believe the IAB MENA should focus on?



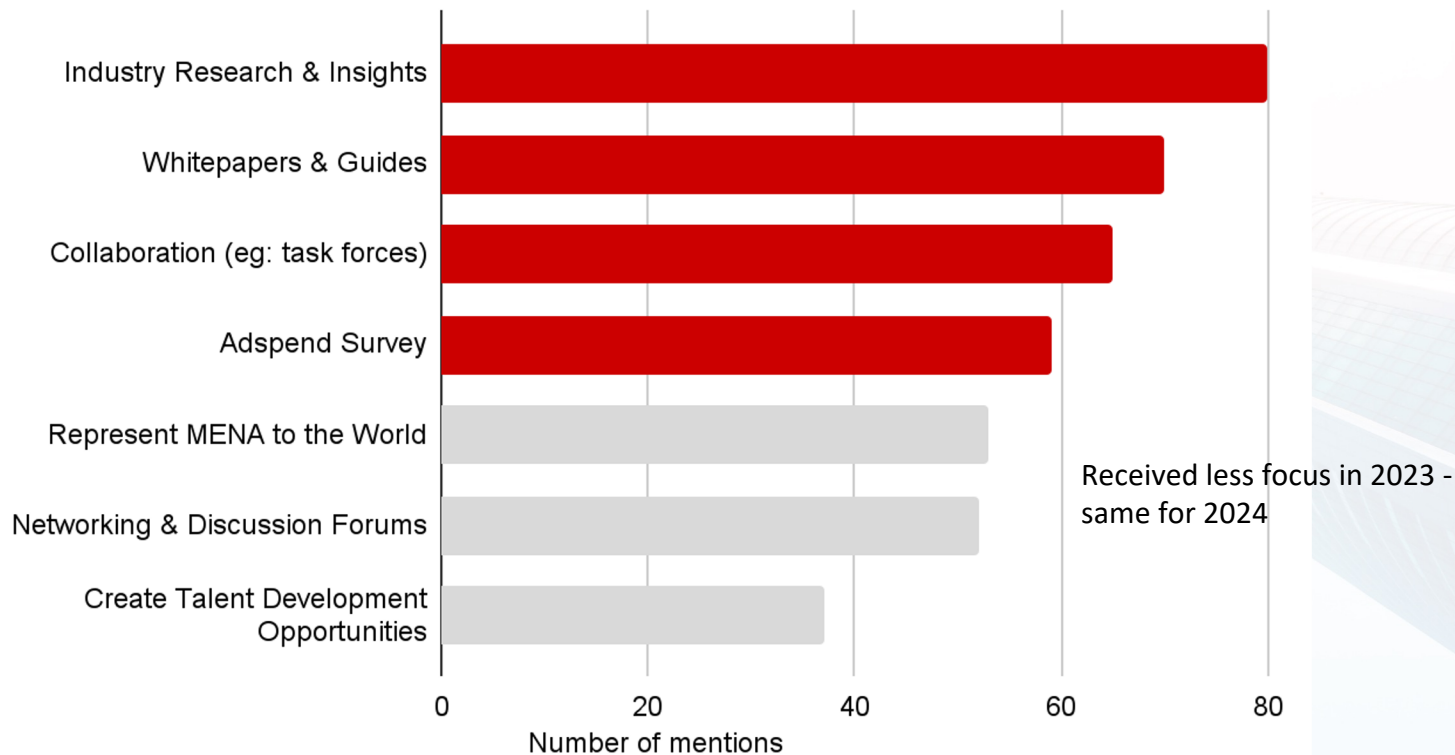
# Wide range of interest areas: Adtech, AI, Measurement and 'new' channels

Which topics should be prioritized in 2024? (select up to 5)



# You want Insights, Collaboration opportunities and Guides

Which outputs would be the most valuable for 2024? (up to 5)



**Close**



Ian Manning  
IAB MENA Exec Director