



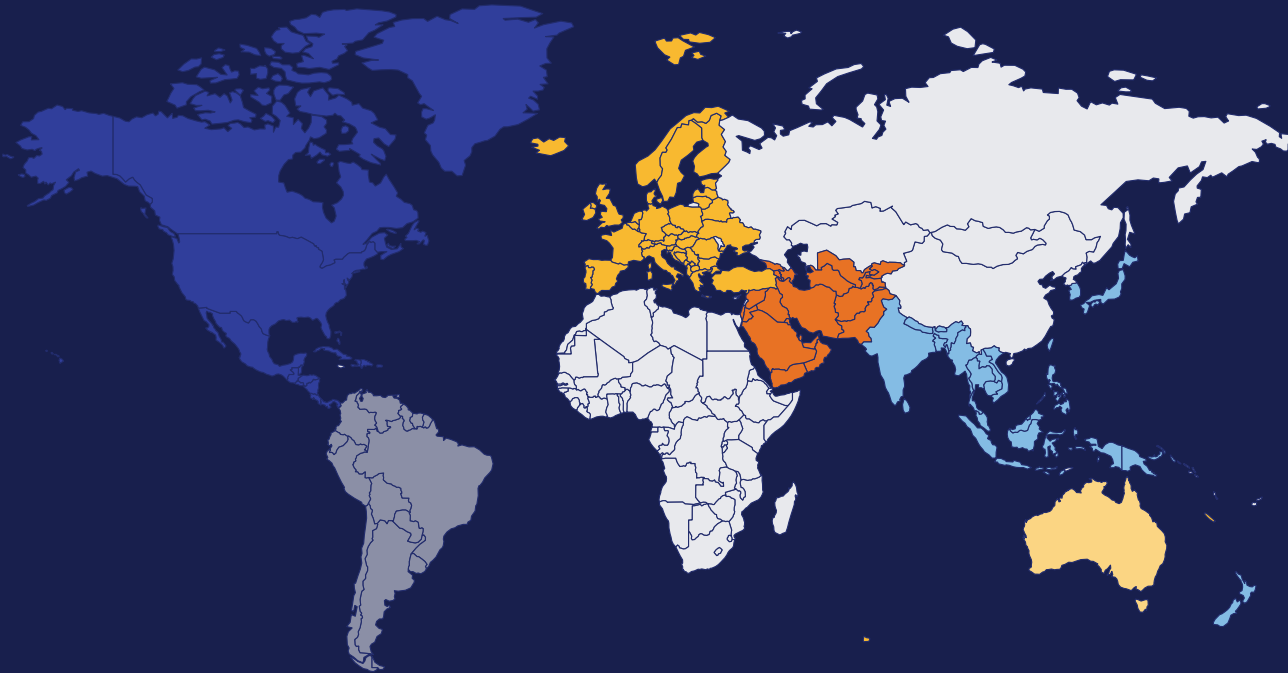
altman solon



MENA Digital Publisher Summit

October 14, 2025

Altman Solon is the largest and leading worldwide strategy firm fully focused on telecommunications, media, and technology



We serve the world's leading media clients and investors across a diverse set of advertising-related needs.

Our strategy services focus on:

- Ad revenue growth strategy
- M&A sourcing and valuation
- Ad product strategy
- Ad sales performance optimization
- Ad tech benchmarking & investment planning

First, let's talk about a bit about **perception** and **reality**



Perceived publisher challenges

- Lower share of total ad wallet
- Erosion of traditional revenue channels
- Limited targetability and attribution
- Minimal direct access to the advertiser



Potential causation

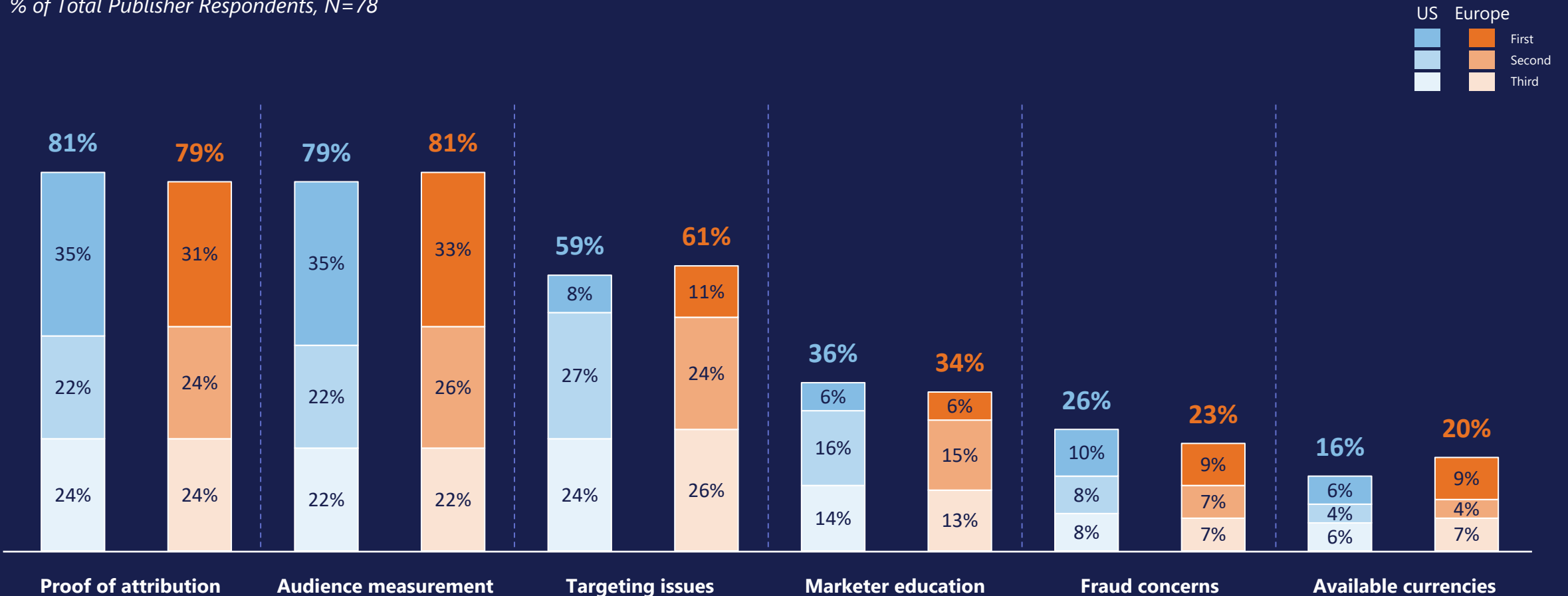
- Undervalued and unscaled ad inventory
- Historic underinvestment in digital
- Lack of broader data partnerships
- Underdeveloped publisher brand

Source: Altman Solon Research and Analysis

European and U.S. publishers have their own perception of challenges

Top Perceived Publisher Challenges for Total Video, Ranked

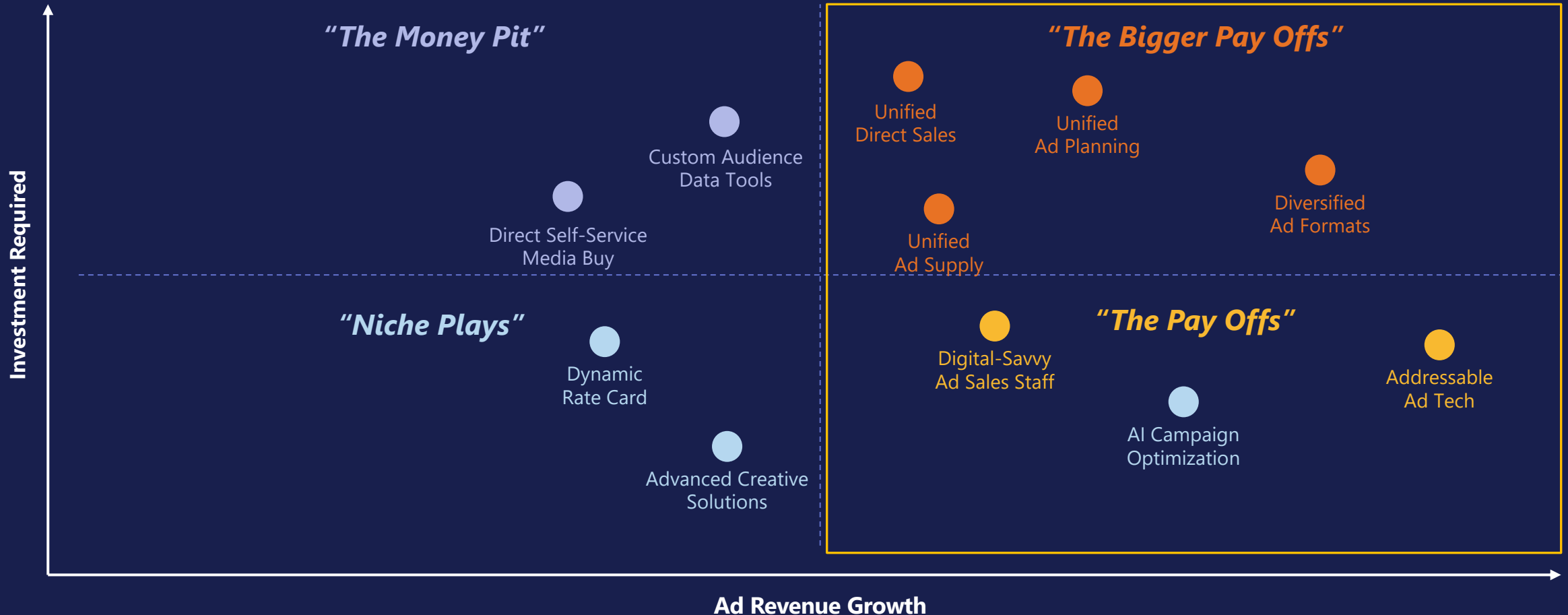
% of Total Publisher Respondents, N=78



Source: Altman Solon Research and Analysis

Maturity for the digital publisher is a balance of investment and scaled reward

ILLUSTRATIVE



Source: Altman Solon Research and Analysis

How can digital publishers in MENA
sustain and also grow their share of
the regional ad wallet?

Source: Altman Solon Research and Analysis

We see leading digital publishers benefit from making key strategic investments



Justify the right to regional and local share of ad wallet through audience scale, data, and currency adoption



"Right size" internal investments in digital ad sales to replace revenue migration and growth expectations



Become a well-branded publisher and marketing while educating the brand and ad buyer

Justify the right to regional and local share of ad wallet through audience scale, data and currency adoption

1

- Collaboration amongst competitors to unify TV ad supply at national level
- Data-driven addressable marketplace
- Counterbalance to digital currency



Source: Altman Solon Research and Analysis

"Right size" internal investments in digital ad sales to replace revenue migration and growth expectations

2

- Unification of fragmented audiences to **justify measured reach and CPMs**
- Scaled investment in **digital channels, sales talent and AI-led processes**
- Household-level **audience graphs**

Televisa Univision



VIX



Source: Altman Solon Research and Analysis

Become a well-branded publisher and market while educating



3

- Scaled cross-publisher **regional supply** for **cross-market ad buys**
- Owned and **aggregated local audience data banks**
- **Market-first insights** to educate the ad buyers and brands



Source: Altman Solon Research and Analysis

Listen for answers to these questions in today's panels



How can MENA publishers scale their inventory to match their growth targets?



How can publisher partnerships in MENA improve measurement and share of channel spend while allowing for competition?



How can MENA digital publishers self-promote while educating brands and buyers?

Questions & Answers



Scan the QR code for
more details on our
perspective on MENA
publisher growth



Daniel Weinbaum

Associate Partner

Daniel.Weinbaum@altmansolon.com