



IAB MENA
CTV Landscape
November 2022

Produced in conjunction with:



Streaming Advertising Agency that
helps OTT platforms monetize and
accelerate growth with video ads.

The potential of CTV Advertising

North America & EMEA CTV Ad Spend

4.2X

Rise compared to 2019's open programmatic CTV Ad spend in North America.

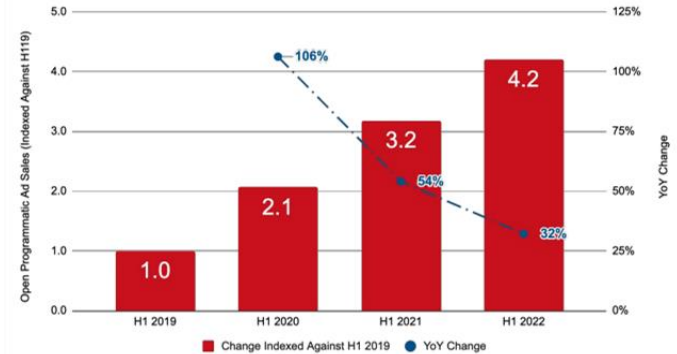
YoY growth of 32% slightly higher than the global average (31%).

21.6X

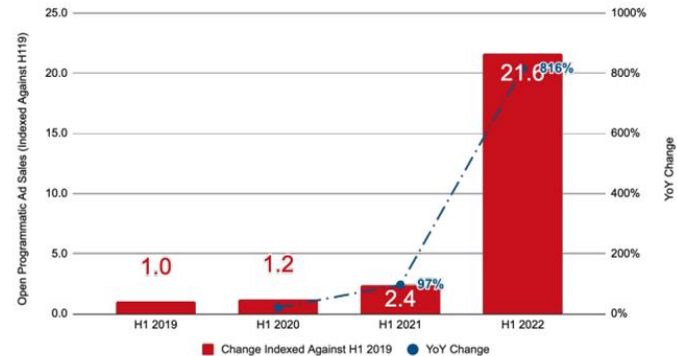
Rise compared to 2019's open programmatic CTV Ad spend in EMEA.

Representing explosive growth after a comparatively modest 97% YoY gain from H120 to H121.

North America CTV Ad spend



EMEA CTV Ad spend





What's the potential of CTV Advertising in MENA?

- 1. The main OTT business models**
- 2. The rise of OTT players in MENA**
- 3. OTT vs. CTV Advertising**
- 4. The OTT Advertising players in MENA**
- 5. The CTV MENA landscape**



**The main
OTT business
models**

1. The main OTT business models

Definitions

SVOD	Subscription Video-On-Demand Entire catalog of On-Demand content that users can access for a monthly fee
TVOD	Transactional Video-On-Demand On-Demand content that users can rent for a limited period of time
EST	Electronic Sell-Through On-Demand content that users can purchase on a pay-per-view basis to own indefinitely
AVOD	Advertising-based Video-On-Demand On-demand content that is Ad-supported and free to watch
Hybrid AVOD/SVOD	Advertising & Subscription Video-On-Demand On-demand content that is Ad-supported and free to watch + On-demand content that is subscription-based
FAST	Free Ad-supported Streaming TV Streaming linear channels that are Ad-supported and free to watch
Ad-Supported SVOD	Ad-supported Subscription Video-On-Demand SVOD services with an Ad-supported tier that is cheaper than the premium plans

1. The main OTT business models

YESTERDAY

SVOD
TVOD
EST
AVOD

TODAY

SVOD
TVOD
EST
AVOD
Hybrid AVOD/SVOD
FAST
Ad-Supported SVOD

TOMORROW

Free
Subscription

1. The New OTT Nomenclature

North America & MENA



Business Models	FREE						SUBSCRIPTION							
Delivery Methods	Linear Live Channels			On Demand Ad-Supported			Linear Live Channels			On Demand Ad-Supported Ad-Free				
Players	North America													
	MENA													



The rise of OTT players in MENA

2. The rise of OTT players in MENA

Do you really know the MENA OTT landscape?

50+ Active OTT services

5 Pure AVOD

38 SVOD

4 Kids niche services

11 Hybrid AVOD/SVOD

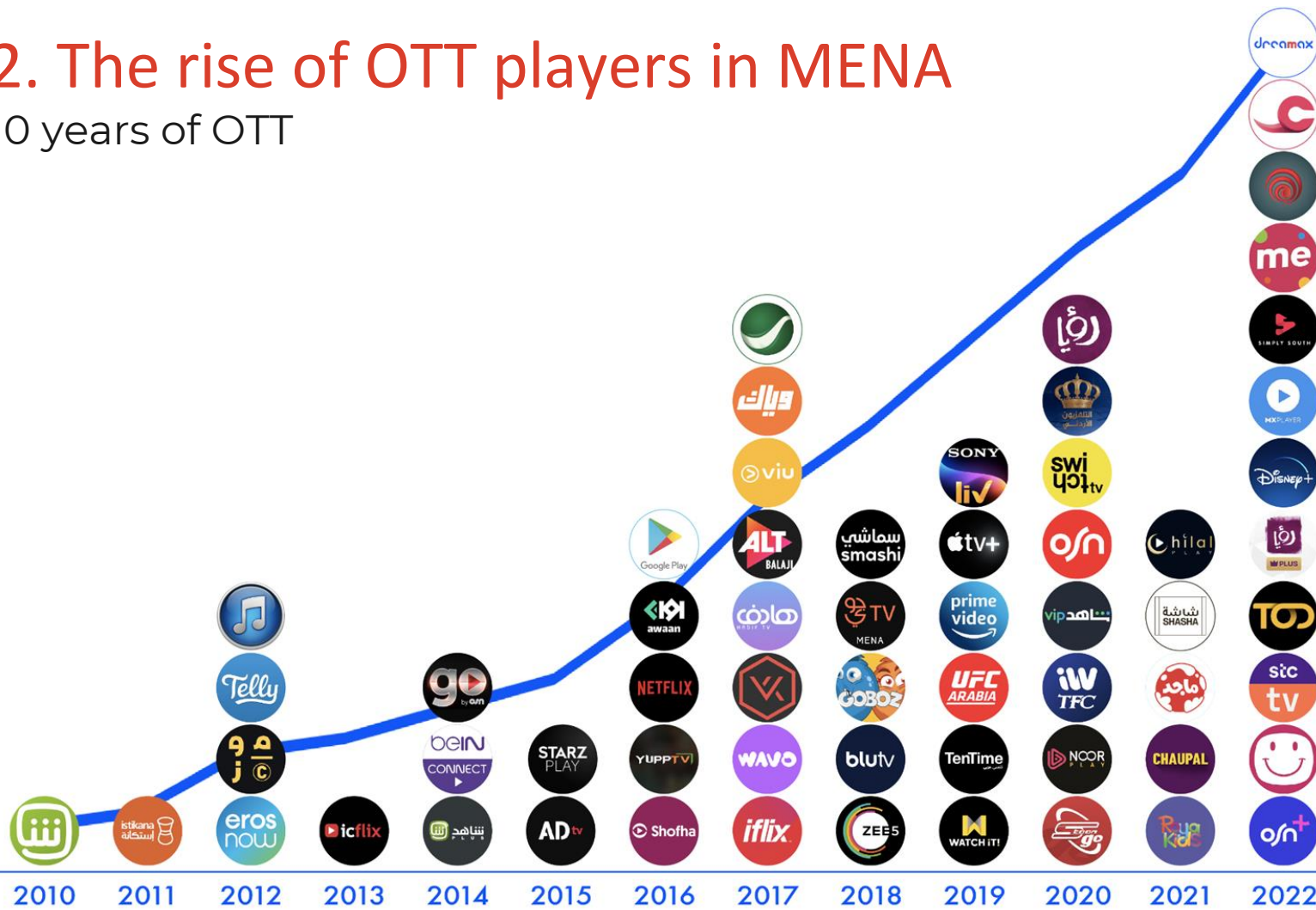
4 Streaming giants

6 OTT international sports

1 Ad-supported SVOD

2. The rise of OTT players in MENA

10 years of OTT





**OTT vs. CTV
Advertising**

3. OTT vs. CTV Advertising

What's the difference?

OTT - Over The Top

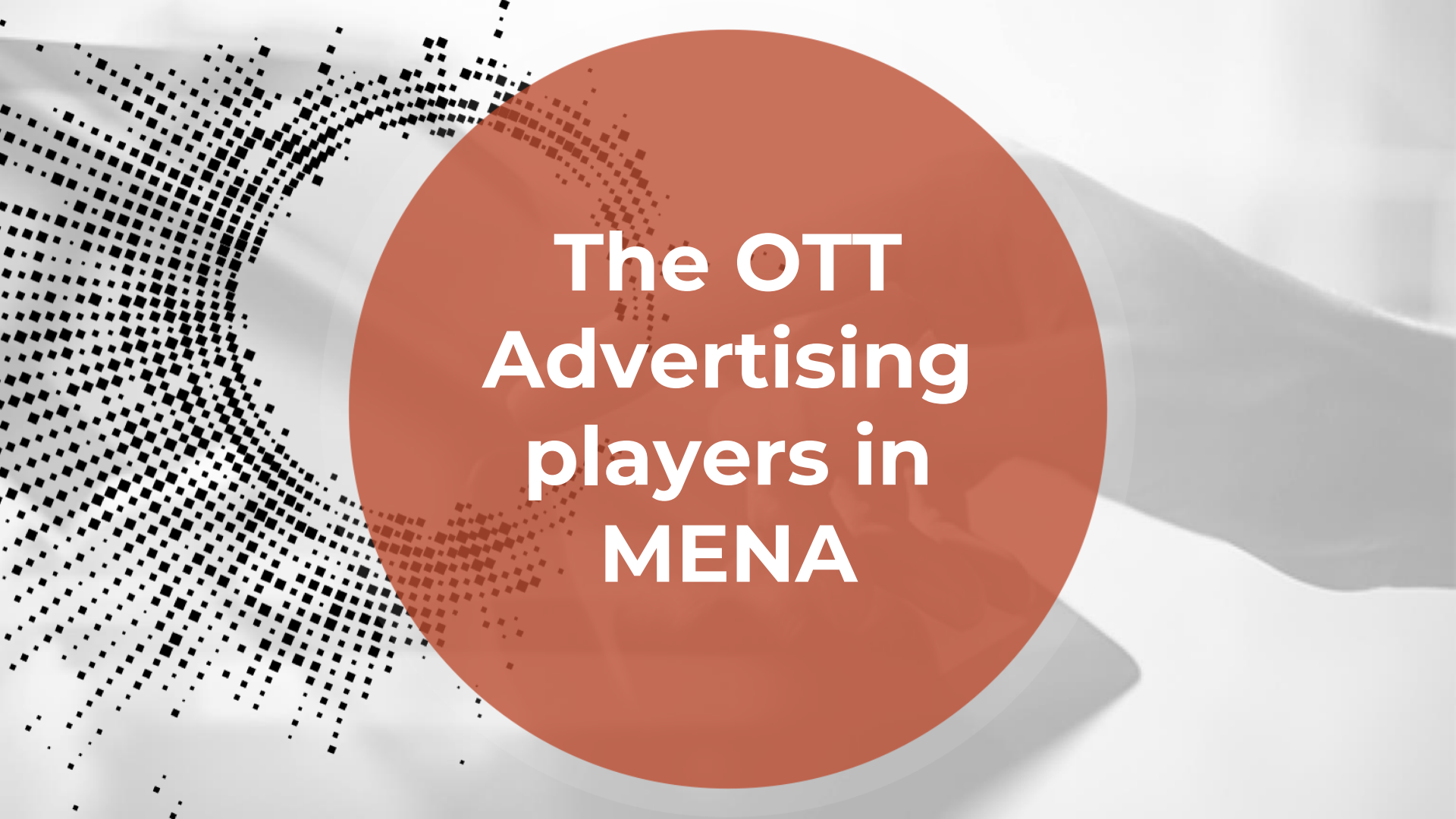
OTT content can be watched on any device that has an internet connection:

- Desktop Web
- Mobile Web
- Smartphone Apps
- Tablet Apps
- Set-Top Boxes
- Smart TVs

CTV - Connected TV

Users prefer viewing content on Connected TV (CTV) because it offers a higher quality viewing experience

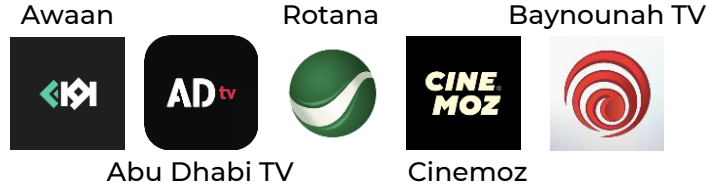
1. Regular TVs connected to devices like Apple TV, Amazon Fire Stick or Chromecast or game consoles
2. TVs with built-in Internet connectivity like smart TVs



**The OTT
Advertising
players in
MENA**

4. The OTT Advertising players in MENA

AVOD



Hybrid AVOD/SVOD




FAST



Ad-Supported SVOD





**The CTV
MENA
landscape**

4. The CTV MENA landscape

From OTT to CTV with ads

17 OTT Advertising services

13 services with CTV Apps (Android and/or Samsung)

7 CTV Apps are serving Ads

4. The CTV MENA landscape

OTT Advertising players with CTV Apps 1/2

Shahid



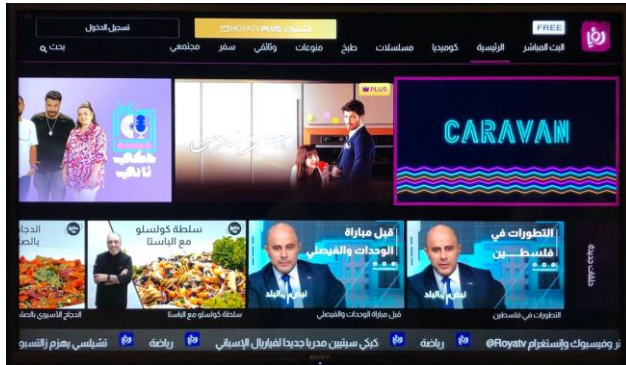
ADtv



Weyyak



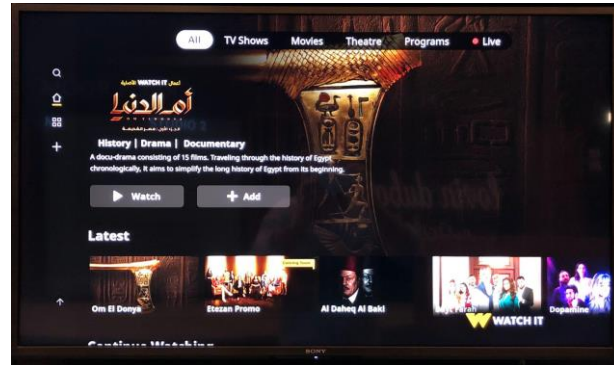
Roya TV



Awaan



Watchit



4. The CTV MENA landscape

OTT Advertising players with CTV Apps 2/2

Smashi



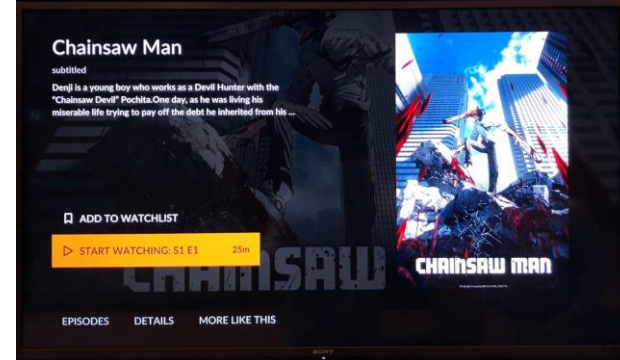
YuppTV



Zee5



Crunchyroll



Viu



ShemarooME



4. The CTV MENA landscape



Examples of CTV Apps with Ads

Emirates



Ikea



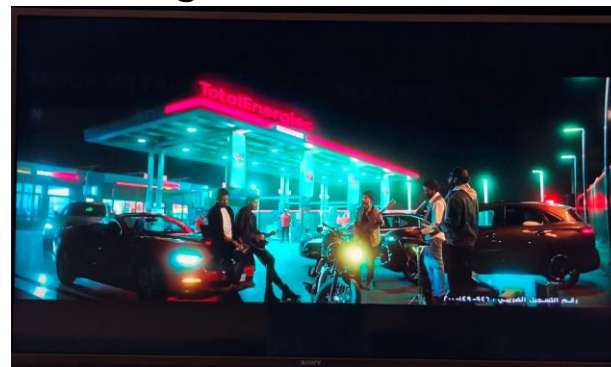
Doliprane



Garrard



Total Energies



KFC



Produced by:



Yann Colleter

The founder of The Streaming Lab, an agency and studio designing and creating streaming-based technology businesses.

Yann launched the SAAND project, a Streaming Advertising Agency that helps OTT platforms monetize and accelerate growth with video ads.



iab **GCC**

