

# IAB MENA Insights: Data Privacy

Date: February 2024

# IAB MENA Data Privacy Survey

- Objective: Test the market's readiness to move into the cookieless world and abide by data and privacy regulation
- Approach: Quantitative survey conducted by the IAB MENA Insights Taskforce
- Fieldwork: The survey fieldwork was over January 2024

## PROFILE

**Market**

**Company**

**Job Level**

**Job Specialty**

## BASELINE

**Awareness**

**Sentiment**

**1st vs. 3rd Party Data**

**Impact on Business Model**

## TECH SOLUTIONS

**Sentiment**

**Tech Alternatives**

**Priorities**

**Progress**

# IAB MENA Data Privacy Survey Key Learnings

There is a **general lack of awareness and education** around data privacy and its implications

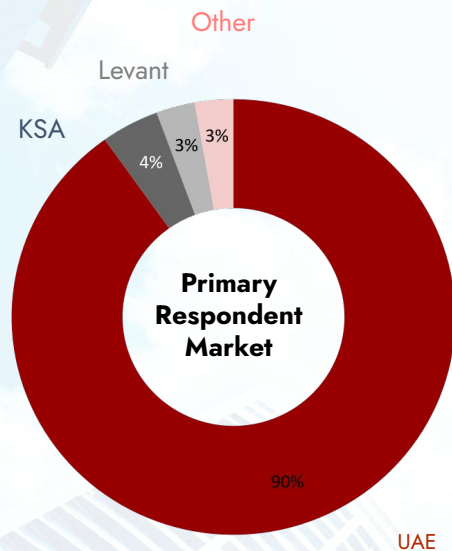
- Half of survey respondents are aware of GCC data privacy regulations, and only 18% of countries' specific regulations
- Respondents still do not know if data privacy will be an opportunity or a risk. Concerns and opportunities are used interchangeably
- Respondents are confused about the potential impact on financial performance, with opinions divided equally

There is also a **general lack of preparedness**

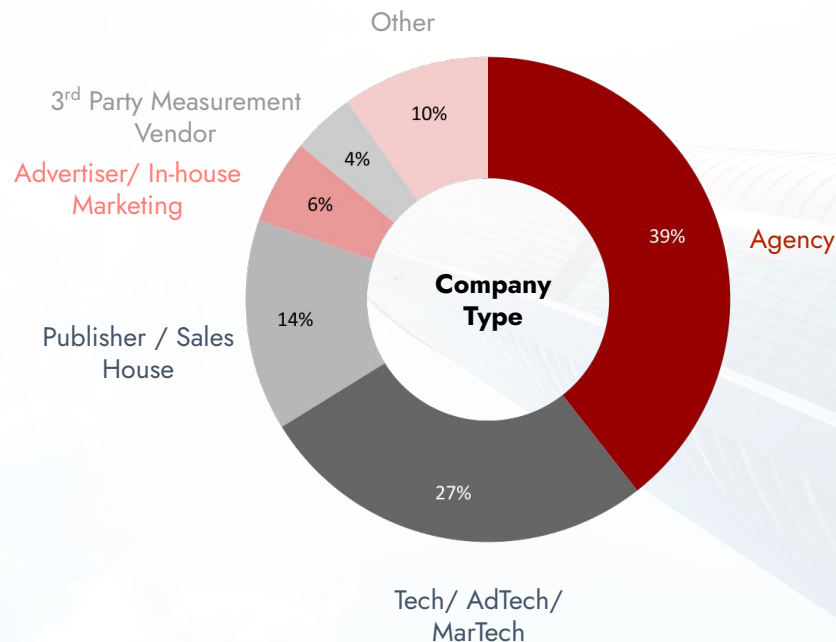
- 65% of respondents feel unprepared to operate in a restricted data usage
- Majority of respondents recognize data privacy solutions as important, however actual implementation is limited
- Only ~50% of those who consider themselves "ready" have actually implemented the solutions

# Survey Respondents: UAE dominance & diversified company types

Respondents work in the UAE at various players along the ads value chain



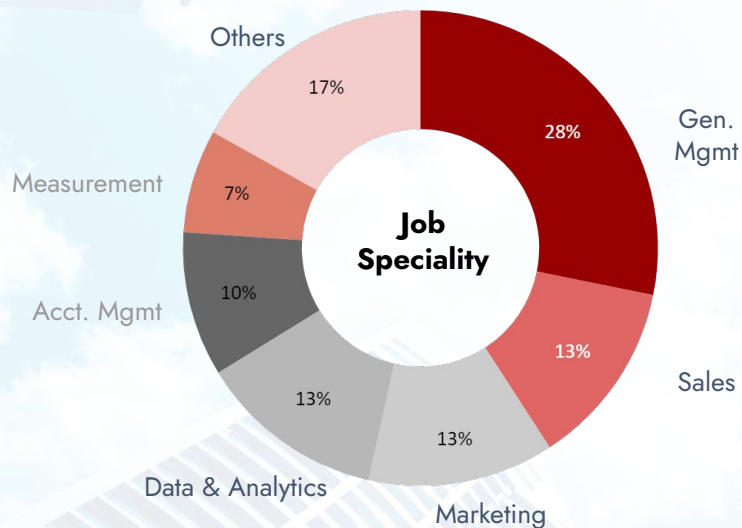
Q: In which market are you primarily located?  
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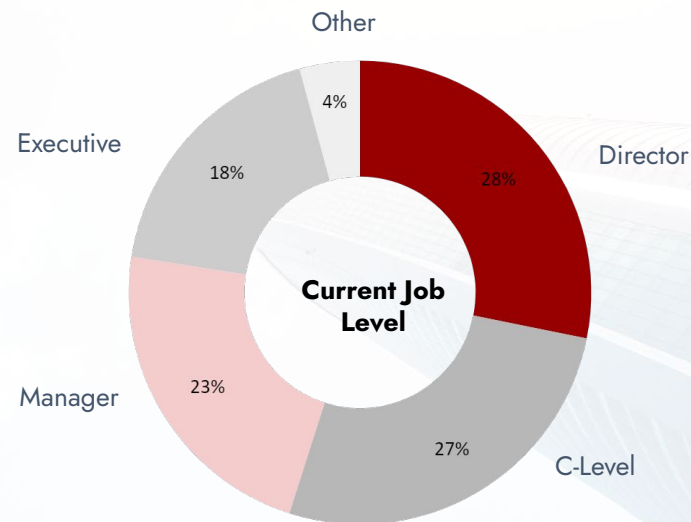
Q: What best describes the type of company you work at?  
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## Survey Respondents: Various and senior roles

Respondents are seniors playing various roles along in the ads value chain



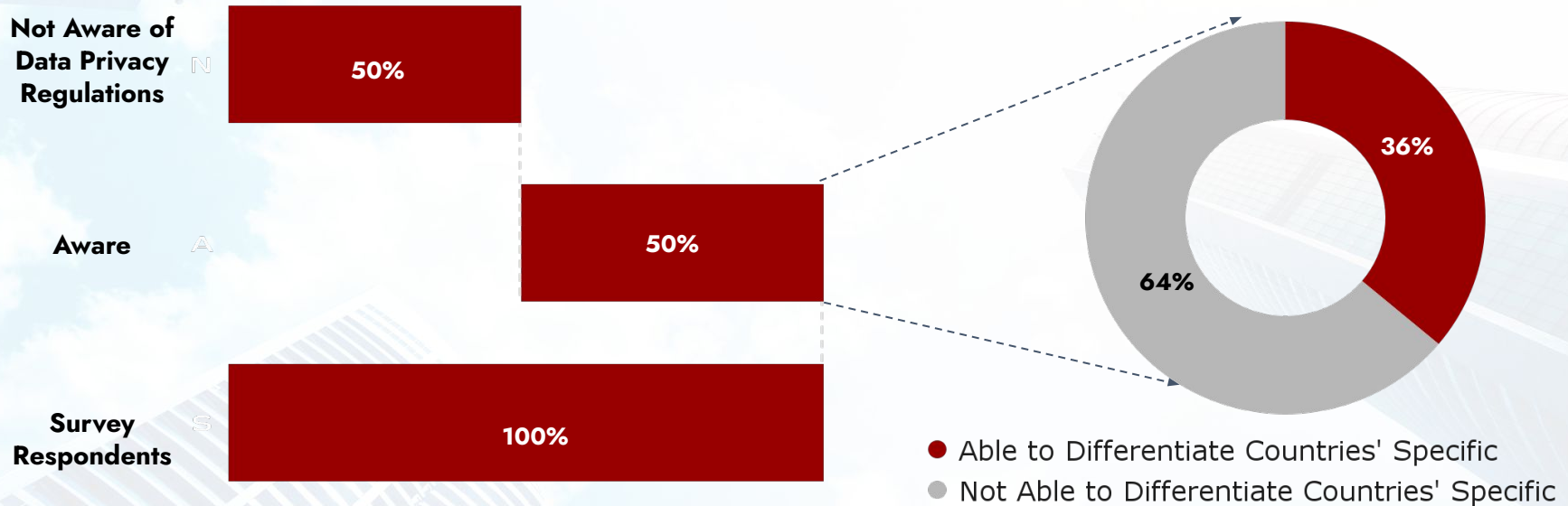
Q: What is your current job speciality?  
N=71, IAB MENA Insights: Data privacy in MENA



Q: What is your current job level?  
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Half of survey respondents are aware of GCC data privacy regulations, and only 18% of countries' specific regulations

Half of the survey participants are aware of data privacy regulations, and among them, only one third can distinguish between the specific regulations of different countries.



Q: How aware are you with data privacy regulations?  
N=71, IAB MENA Insights: Data Privacy in MENA

Q: Are you able to distinguish countries specific regulations?  
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# Respondents are neither concerned nor excited with data privacy regulations

Concerns around data privacy regulations and opportunities are used interchangeably

Only

25%

Are concerned about data privacy regulation

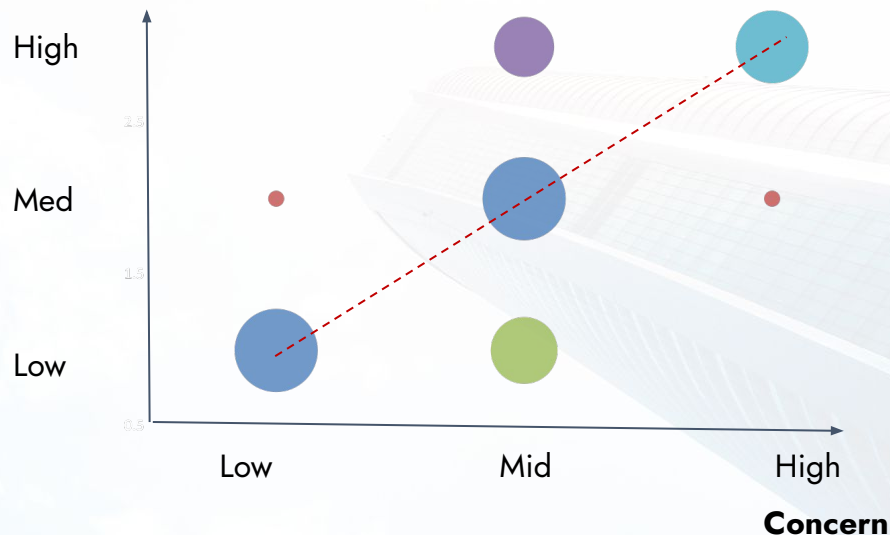
Only

30%

Are excited about the new opportunities

Q: Level of concern for privacy regulation  
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## Opportunity



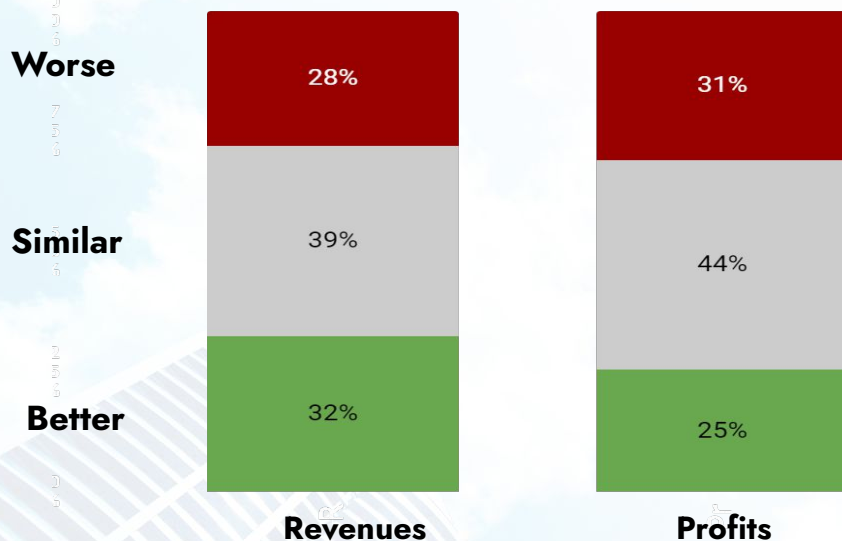
Size of the bubble relative to the percent of respondents

Q: Level of Excitement around New Opportunities  
N=71, IAB MENA Insights: Data Privacy in MENA

# Lack of clarity on the impact of the cookieless world on profitability

Respondents are uncertain about the financial implications of data privacy regulation

Cookieless World Impact on Revenues/ Profitability



Respondents perceive that the transition to a cookieless world will have a comparable impact on both revenues and profitability

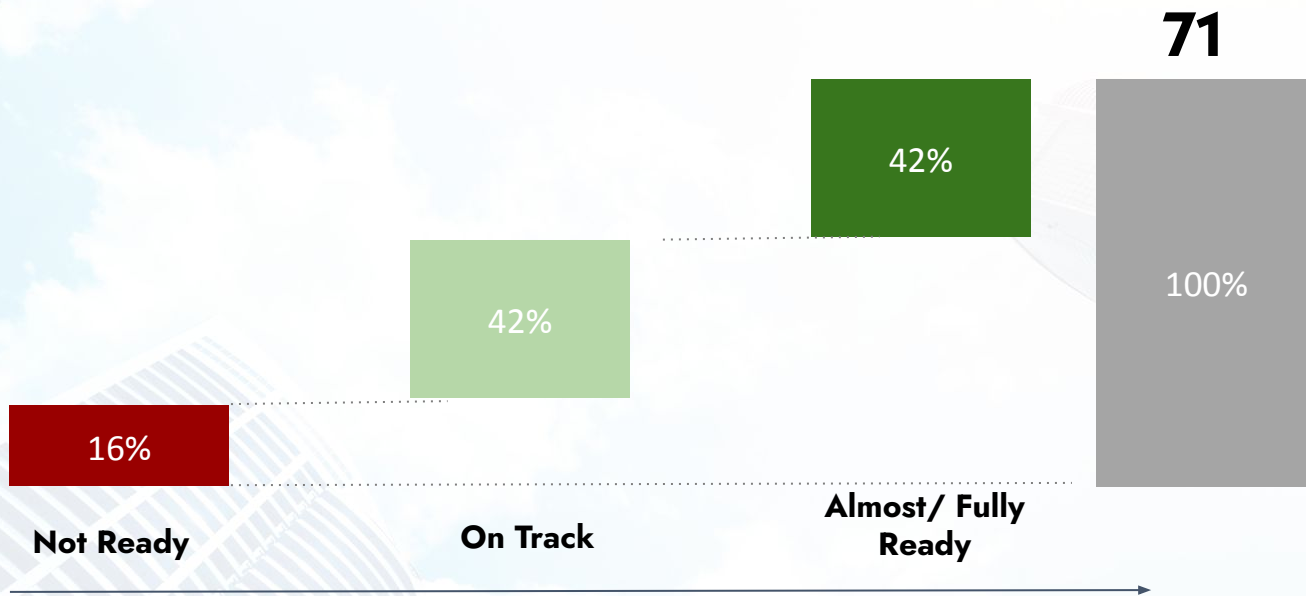
Q: Impact of the move to a cookieless world on revenues & profits  
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65% of respondents believe they are not ready to operate in a restricted data usage

Respondents are ready to move to a more restricted data usage environment

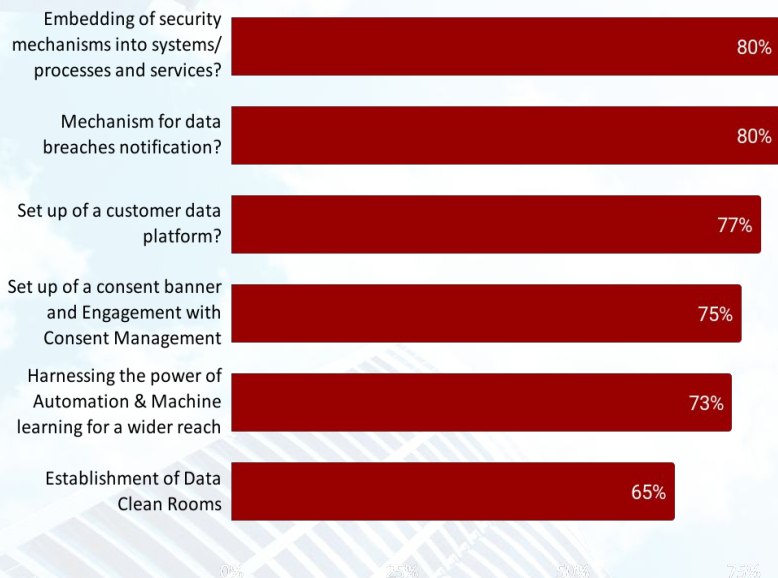
Level of Readiness to Operate in a Restricted Data Usage Environment



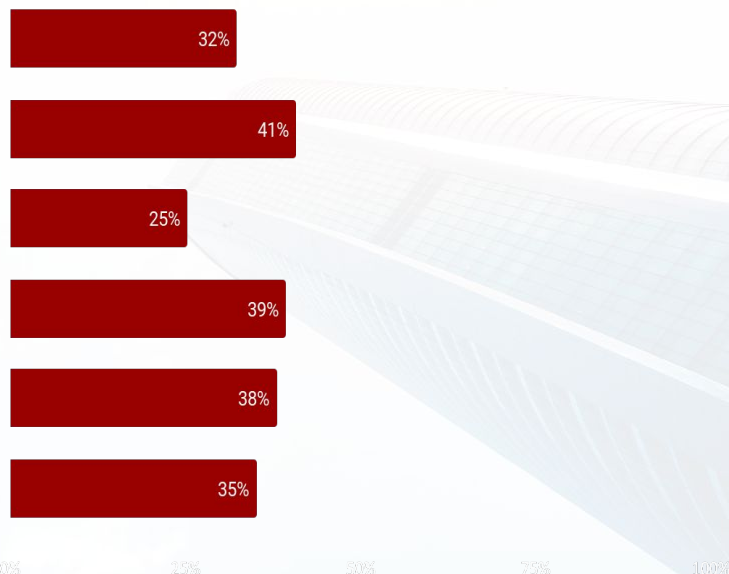
Q: Level of readiness to operate in a restricted data usage environment  
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# While the majority of respondents believe that the suggested solutions are important in a data restricted future, few have actually implemented them

% of respondents who think it is “extremely important” or “very important”



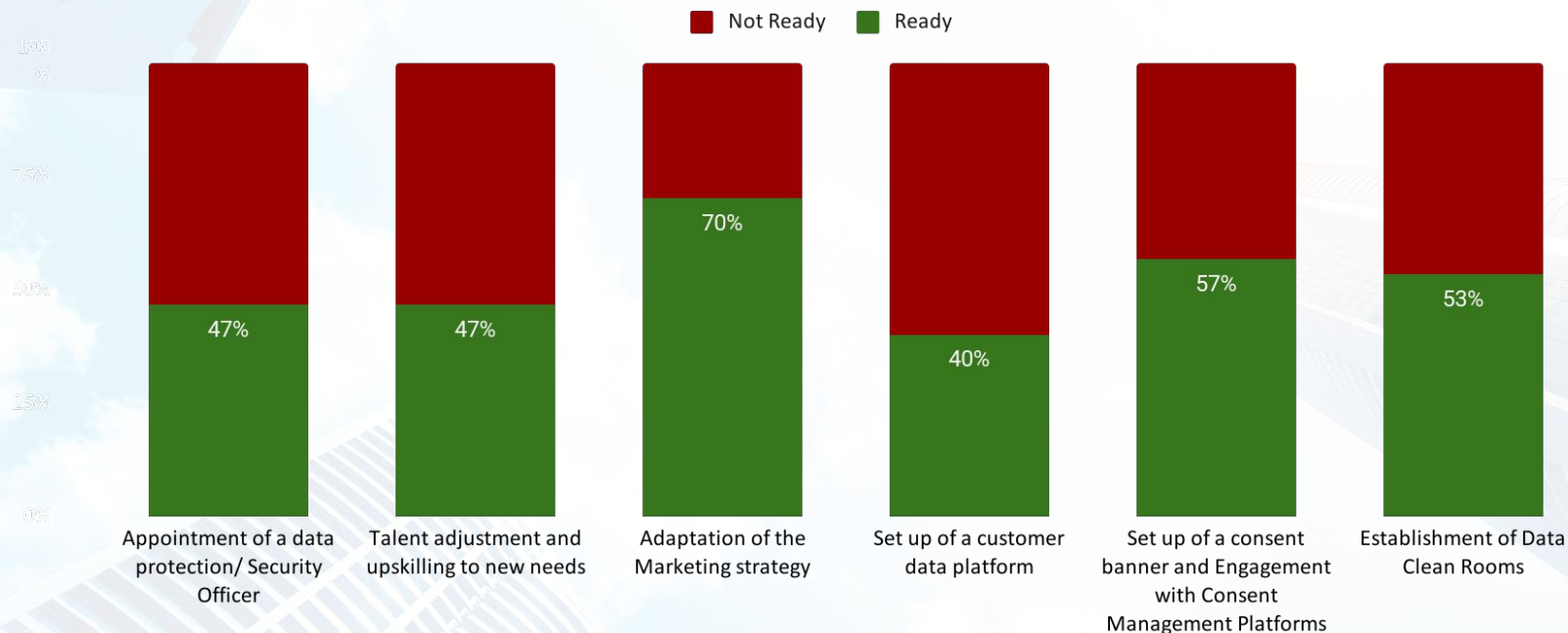
% of respondents who have implemented these solutions



Q: Level of readiness to operate in a restricted data usage environment  
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# Even within the cohort of responders who consider themselves ready, they have not fully implemented measures to prepare them for a cookieless future (1/2)

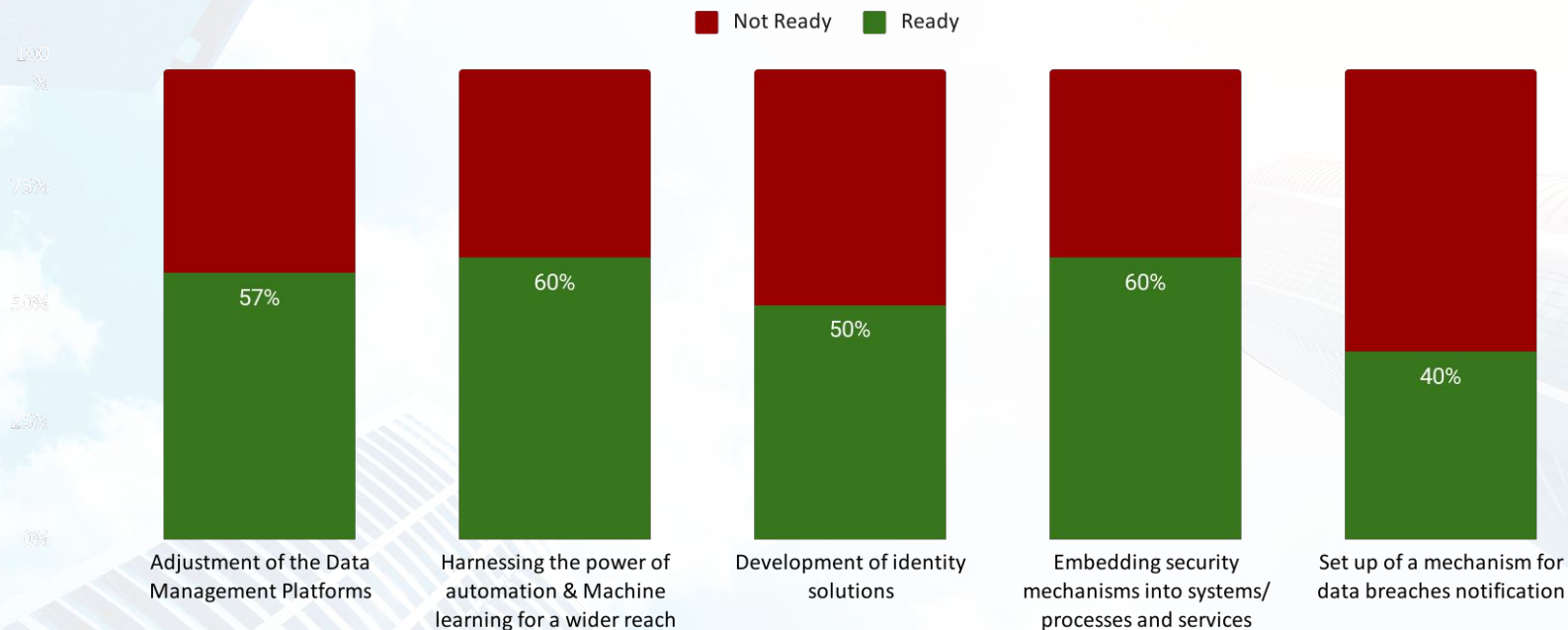
Between 40-70% of “ready” respondents have implemented the solutions



Q: Progress in implementing tech solutions  
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Between 40-70% of “ready” respondents have implemented the solutions



Q: Level of readiness to operate in a restricted data usage environment  
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With thanks to the Insights Taskforce



## About IAB MENA

Established in May 2019, The Interactive Advertising Bureau (IAB MENA) is the regional voice and thought leader of the region's interactive marketing and advertising industry, committed to building a sustainable future for digital advertising in the region.

Our members number in excess of 50, representing 80 companies that represent the full spectrum of the MENA digital advertising industry and include:

Advertisers

Agencies

Measurement

Publishers

Research

Sales Houses

Tech Platforms

### OUR VISION

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.

To join IAB MENA: <https://iabmena.com/membership/>

For more insights: <https://iabmena.com/explore-all/>

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