

Q4 2022 PULSE SURVEY
OCTOBER 2022

IAB GCC Q4 Pulse Survey.

PURPOSE: The survey aims to gather insights into the state of the MENA Digital Advertising Market in Q4 2022.

RATIONALE: With the twin effects of global economic disruption and the region hosting the FIFA World Cup for the first time in November, our aim is to get a better understanding of how this is impacting advertising and marketing sentiment.

The results are available free of charge to the whole industry.

Summary.

The IAB GCC Q4 Pulse Survey was conducted by 71 people from the MENA region, within the digital advertising space.

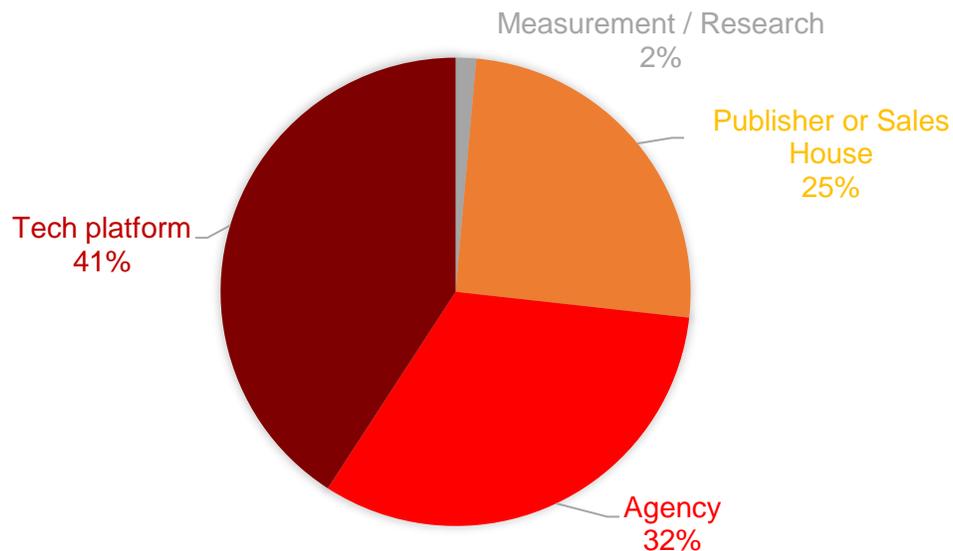
From this pool of respondents, the following insights were provided:

- **81% of respondents** expected a YoY growth within the digital ad market. Of that, 35% expect to see YoY growth in excess of 15%, while 46% expect between 5 and 15%
- **Video is king**. 42% of respondents expect a growth in excess of 15% of video within the media mix.
- While respondents didn't agree on the scale of positive or negative impacts of economic factors such as Energy prices or the strong dollar, they were united in their concerns for '**job uncertainty**' and '**inflation**'.
- 27% of senior decision-makers polled expected **hiring freezes in early 2023** in comparison to 24% who expected **hiring to continue**.

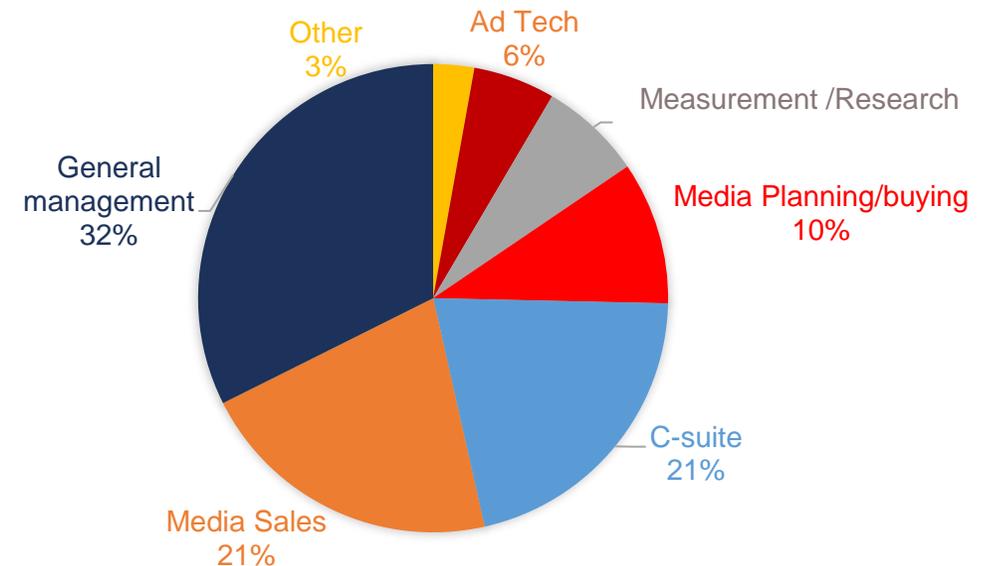
Fieldwork and Sample.

- **Period:** Fieldwork conducted between xx and 16 October
- **Region:** MENA
- **Sample:** 71 Completed surveys

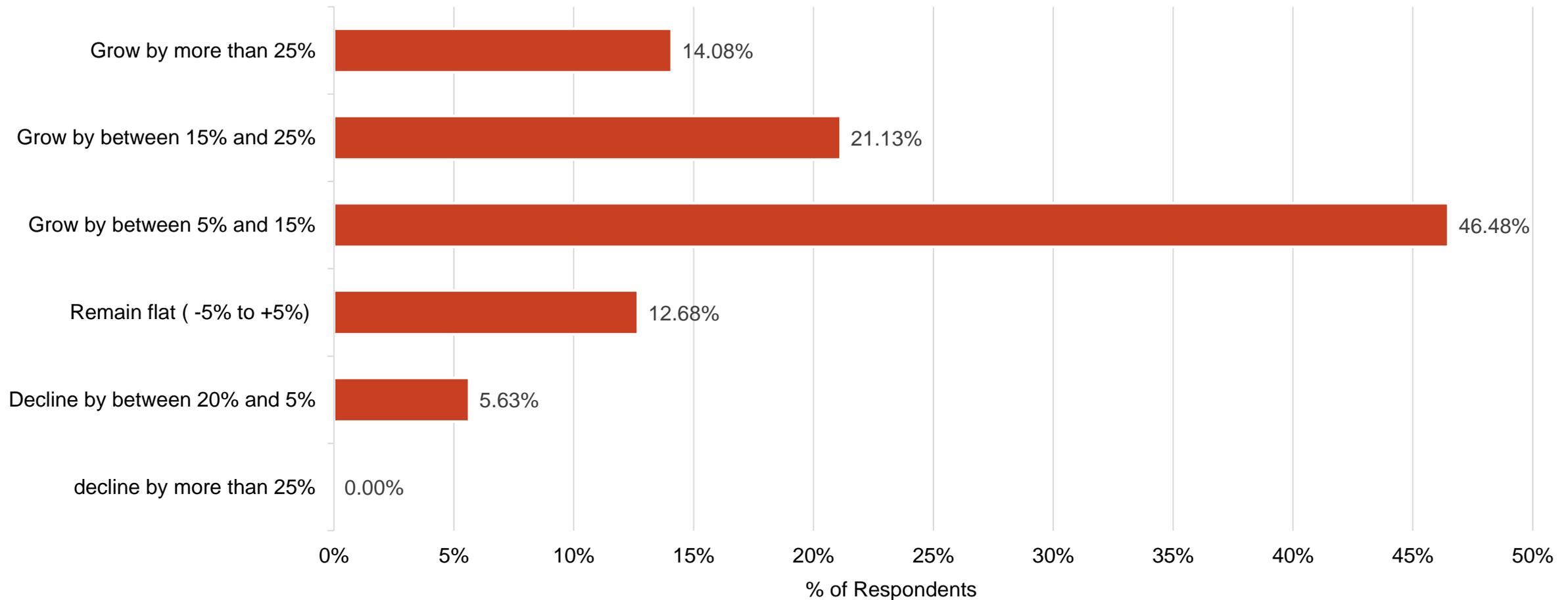
TYPE OF COMPANY



ROLE WITHIN COMPANY

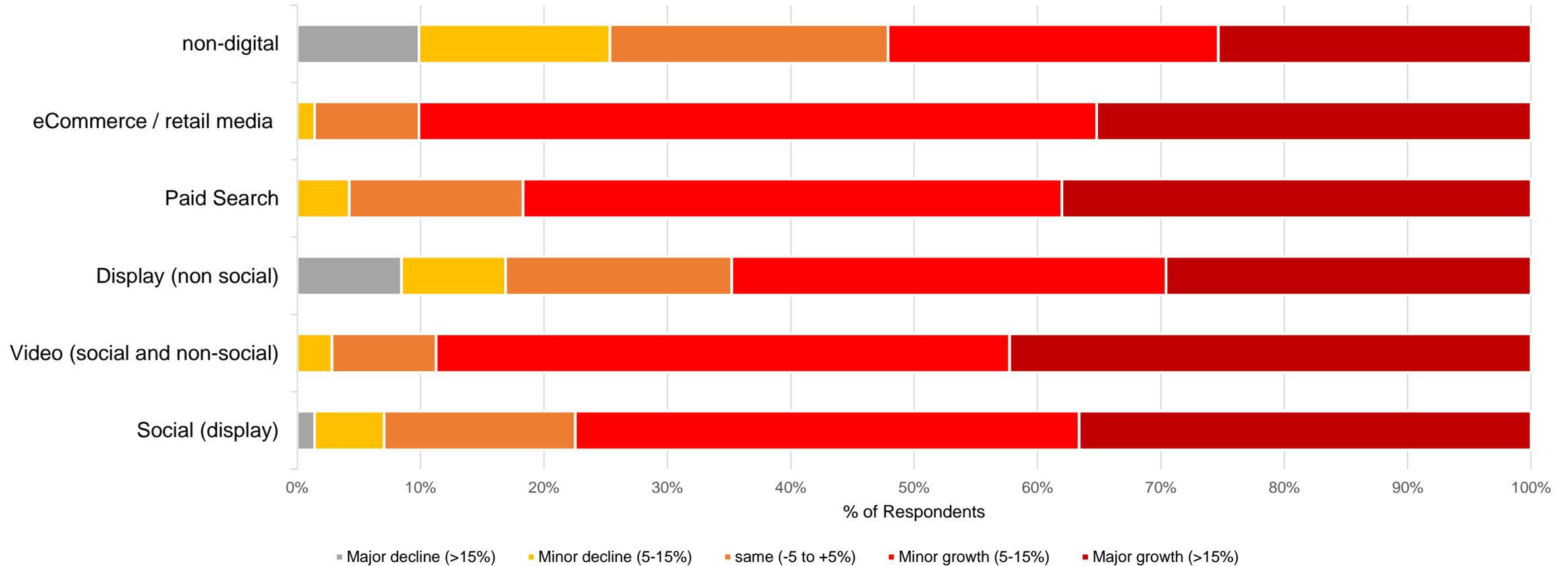


Q4 Expected YoY Digital Growth



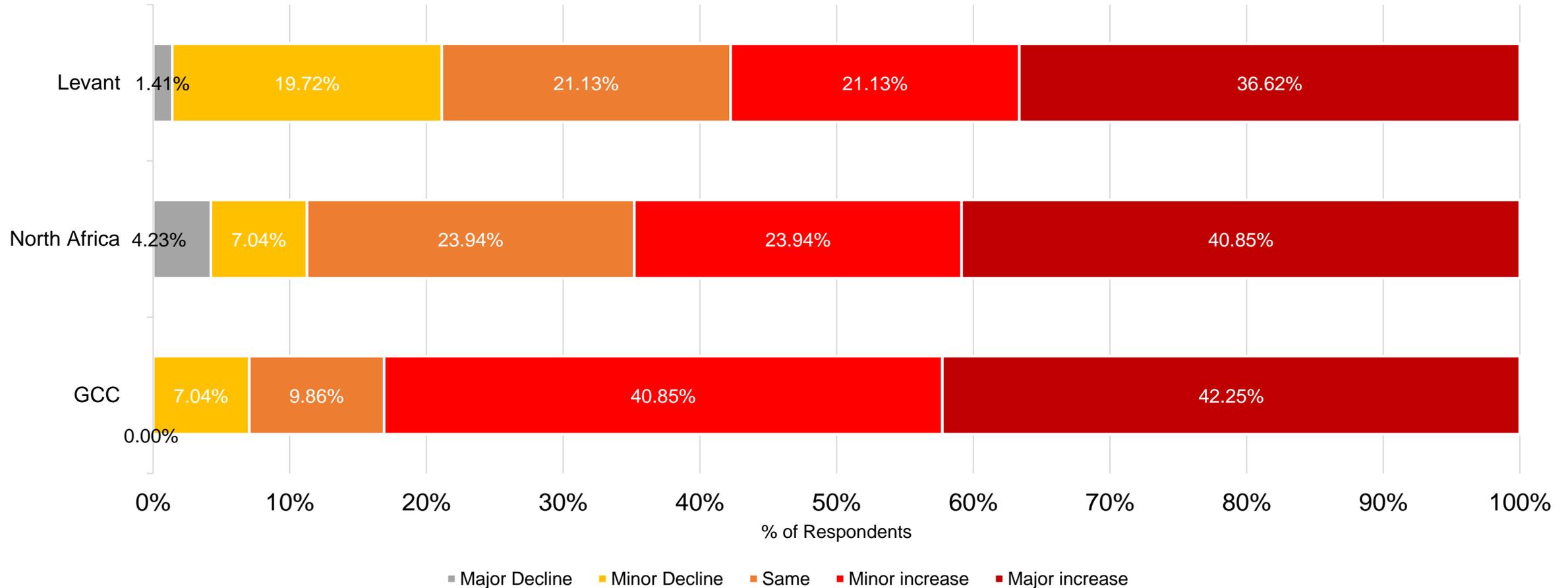
Q: The digital admarket grew around 25% 2021 v 2020. Given the current economic situation, what level of growth are you expecting the MENA market to see in digital advertising for Q4 2022 v Q4 2021?

Expected Shifts to Media Mix.



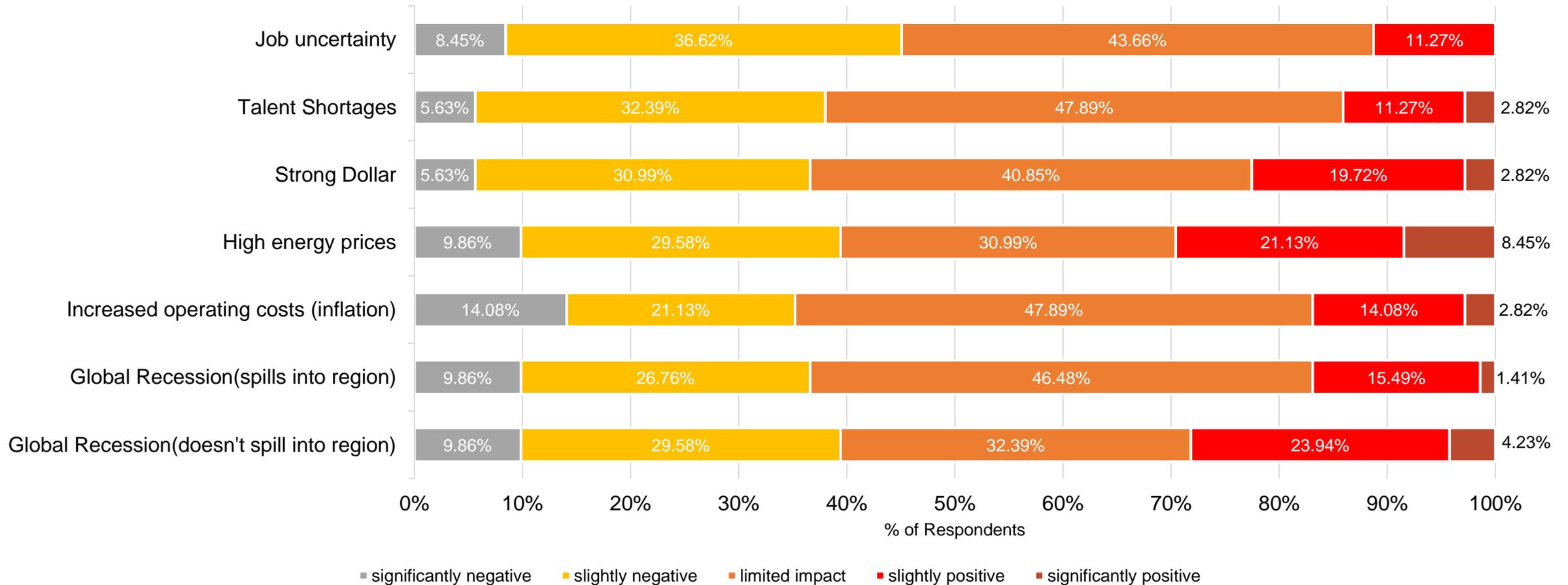
Q: Thinking about Q4, what changes in the media mix do you predict given the twin factors of the World Cup and the current economic situation v Q4 2021?

Expected Shifts to Regional Investment.



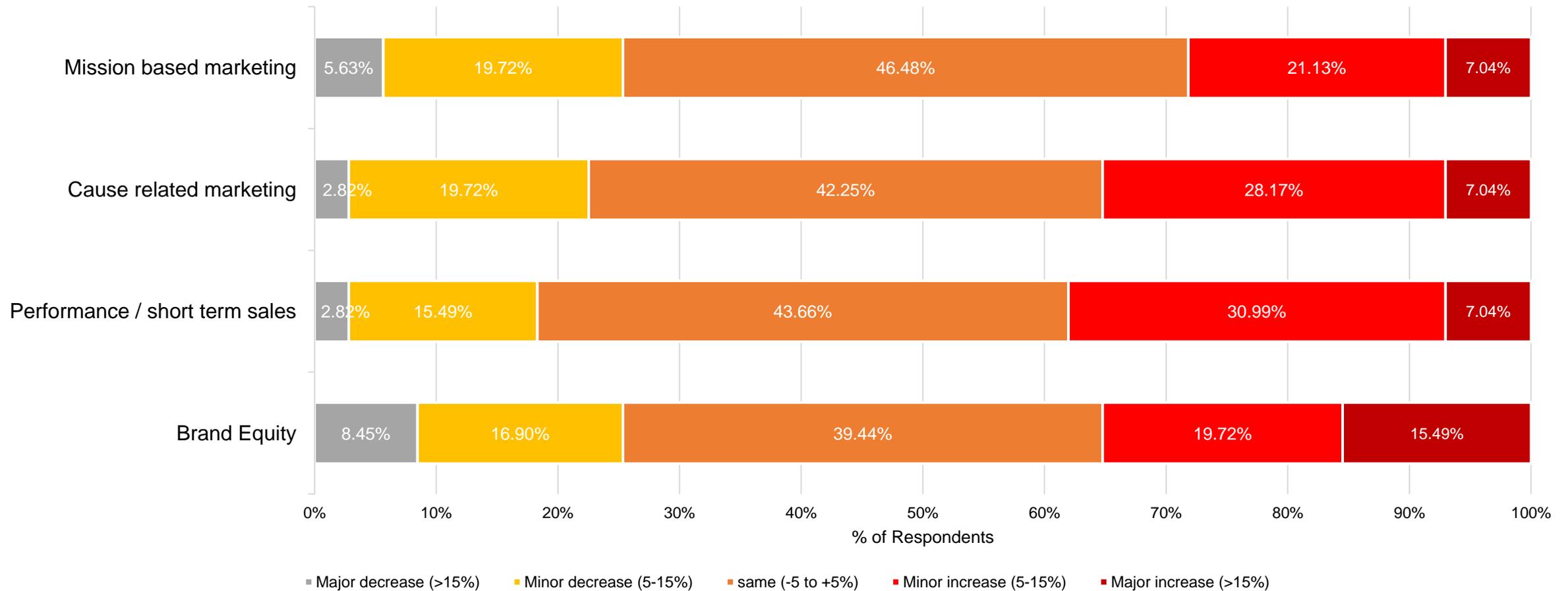
Q: What changes in regional budget allocation do you predict, given the twin factors of World Cup and the current economic situation v Q4 2021?

Impacts on Investment in 2023.

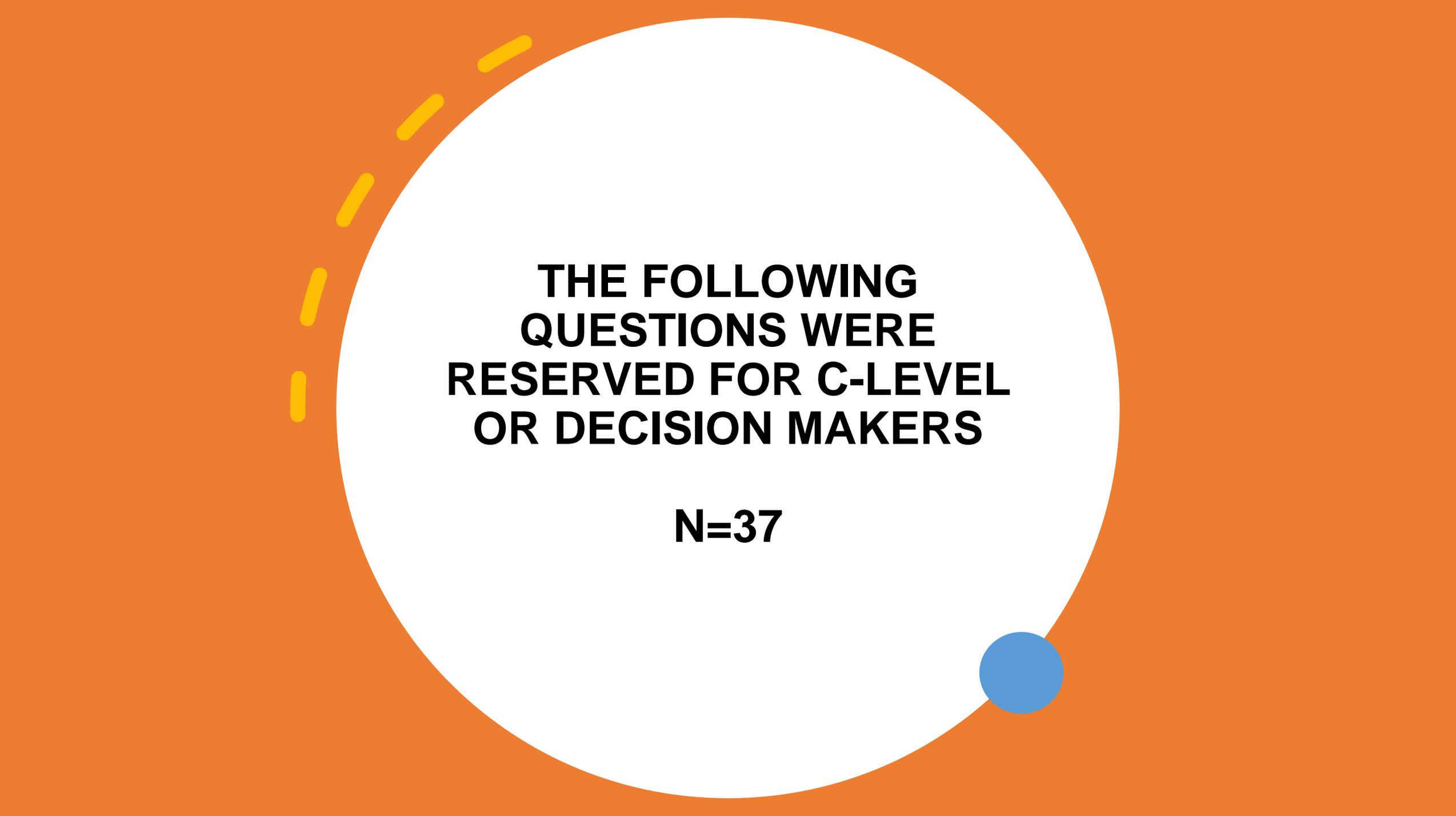


Q: Thinking ahead to 2023, how impactful do you believe the following will be on overall digital advertising investment

Changes to Marketing strategies.



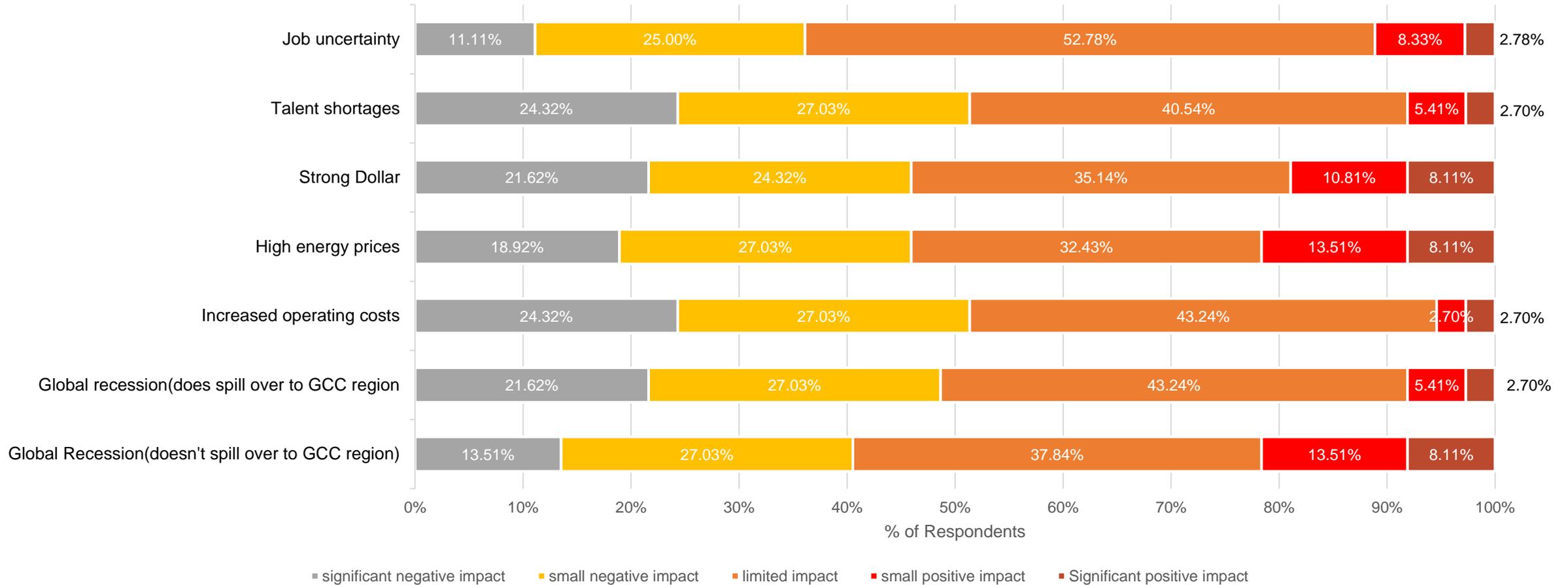
Q: What is your estimation of changes regarding the use of the following messaging strategies in Q4 2022 v Q4 2021



**THE FOLLOWING
QUESTIONS WERE
RESERVED FOR C-LEVEL
OR DECISION MAKERS**

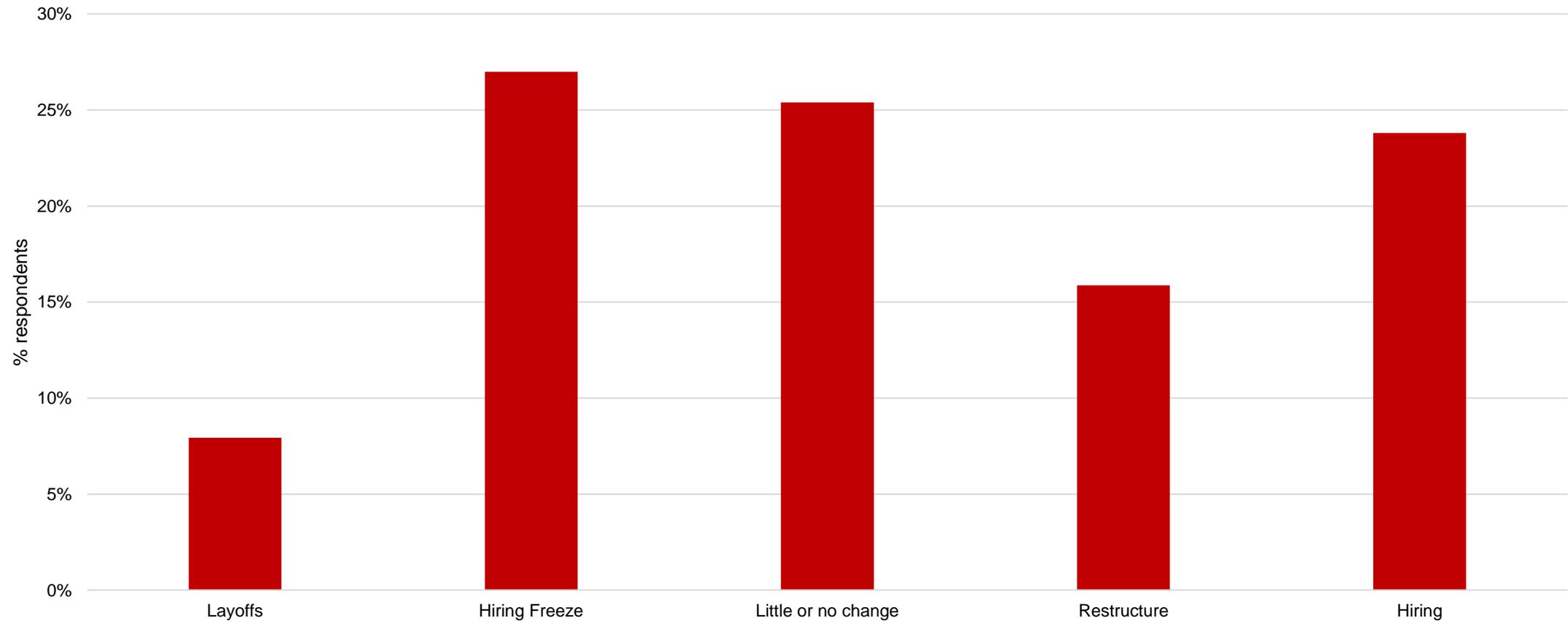
N=37

Impacts on own business in 2023.

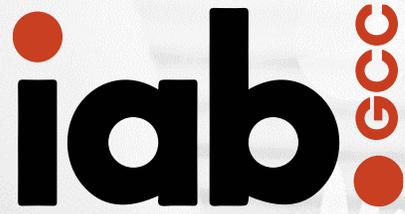


Q: Considering what you see in the market today, what is the relative impact of the following on your own business (n=37)

Talent Plans for 2023.



Q: What do you expect to see in your business regarding hiring/staffing plans for Q4/Q1 2023 (n=37)



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