

**ADEX** 

**GAME CHANGERS** 



#### INTRODUCTION

Since the COVID-19 pandemic hit the MENA region, drastic changes took over the media advertising industry. Budgets reduced with the days and unexpected shifts in media expenditure are perceived. The consumption of media is evolving in these times and with it, brings unusual behaviors from the end consumers and therefore advertisers in the execution of their campaigns across all media

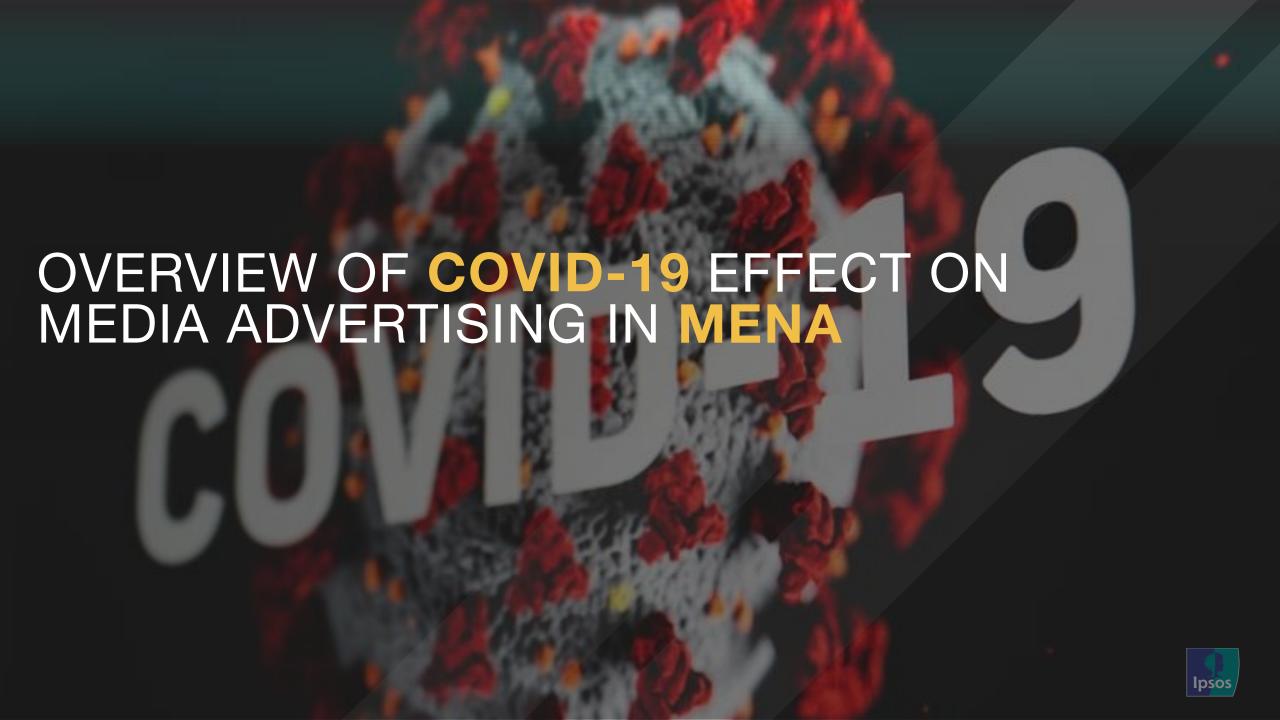
#### **METHODOLOGY OF STATEX**



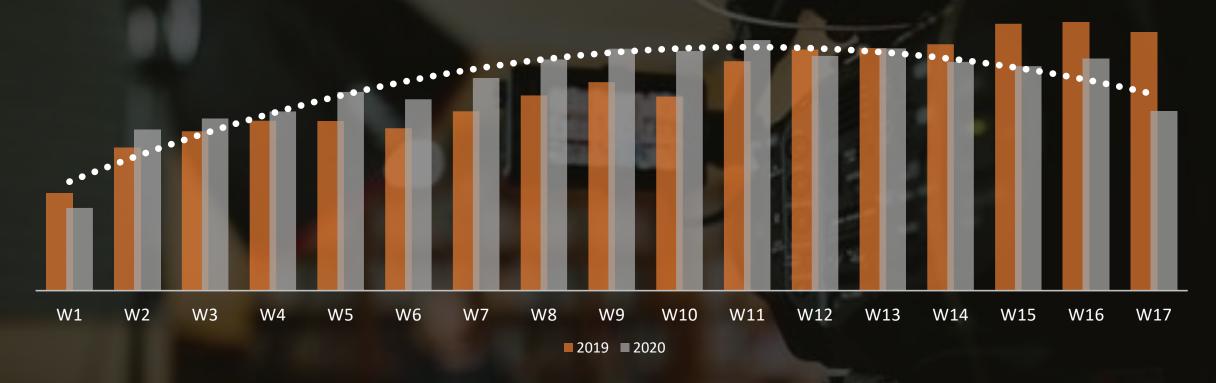
IPSOS collects data from 6 different types of media – TV, Radio, Outdoor, Cinema, Print & Digital, identifying valuable ad spaces across 11 markets in the **MENA** region The main aim of this report is to cover the visible changes in the advertising industry in MENA region during the outbreak of COVID-19. Some of the covered points are:

- Shift from Radio, Print, Outdoor to TV & Digital
- Weekly trend comparison of 2019 vs 2020 data
- Overview & insights of each media type
- Effect of COVID-19 on different advertising industries

SOURCE: STATEX



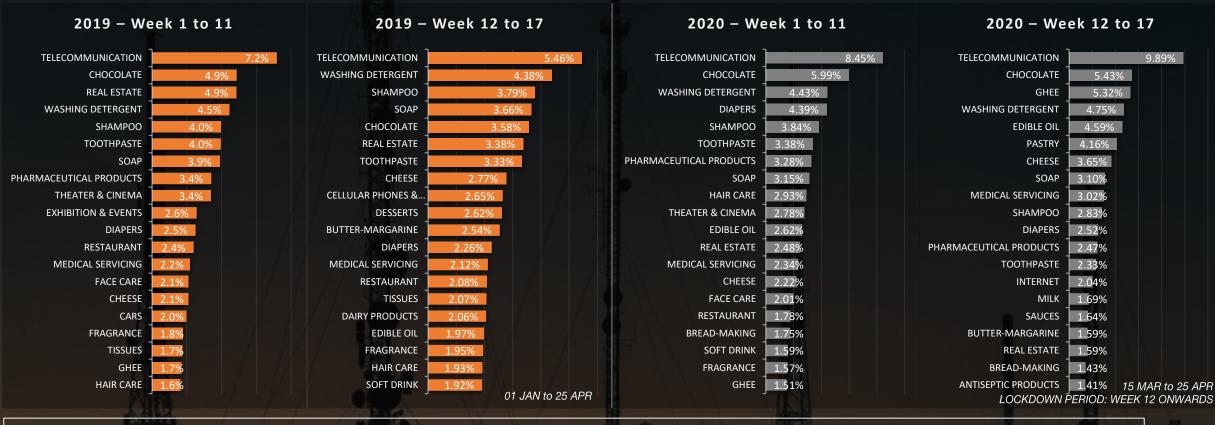
## WEEKLY OVERVIEW OF ADVERTISING TREND – 2019 Vs 2020 TRADITIONAL & DIGITAL



The advertising trend across 6 media types shows a fairly consistent direction for both years during the start of Q1, however the hike in the advertising spend started to drop in 2020 when COVID-19 outbreak hit the MENA region during WEEK 12. The drop is mainly driven by PRINT & RADIO shifting budgets to Digital & TV as the most convenient and exposed mediums globally.



### THE IMPACT OF COVID-19 IN THE RANKING OF CATEGORIES -2019 Vs 2020 TRADITIONAL & DIGITAL

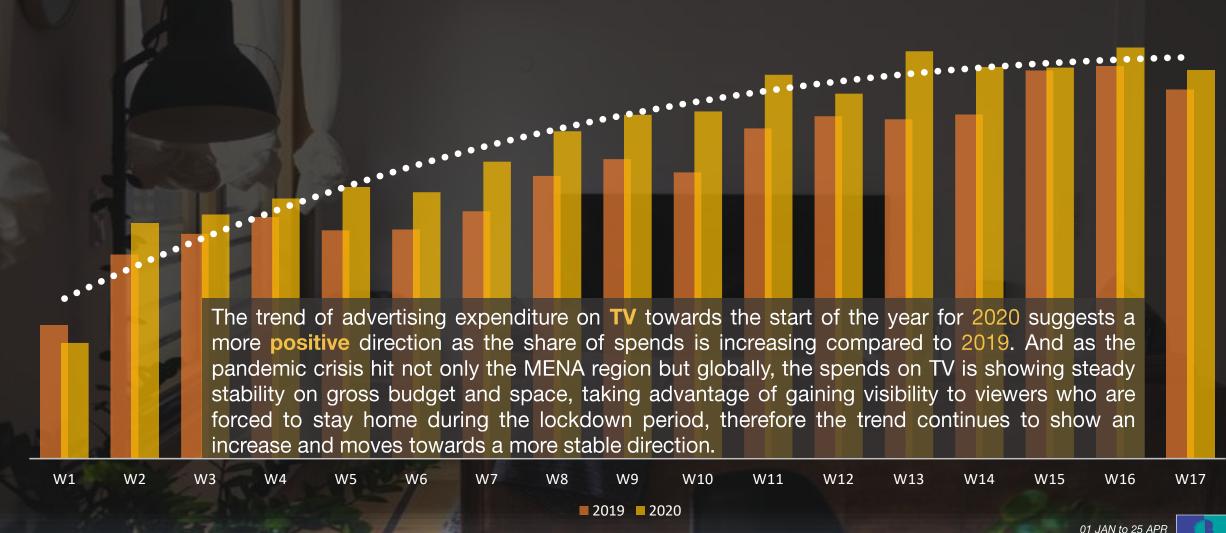


One of the key **highlights** of the categories ranking in comparison is the share of spends for **CHOCOLATE** products which shows a significant increase in 2020 for both periods from WEEK 1 to 11 & WEEK 12 to 17 and remains in the top second position even during the lockdown period – WEEK 12 to 17. This suggests that advertisers in the **FOOD** industry find an opportunity to target families staying at home during the lockdown to increase visibility over food products which also includes **GHEE, EDIBLE OIL, PASTRY, & CHEESE** which are ranking in top positions.





# WEEKLY OVERVIEW OF ADVERTISING TREND TELEVISION



PR Ipsos

### WEEKLY ADVERTISING TRENDS OF TOP SECTORS

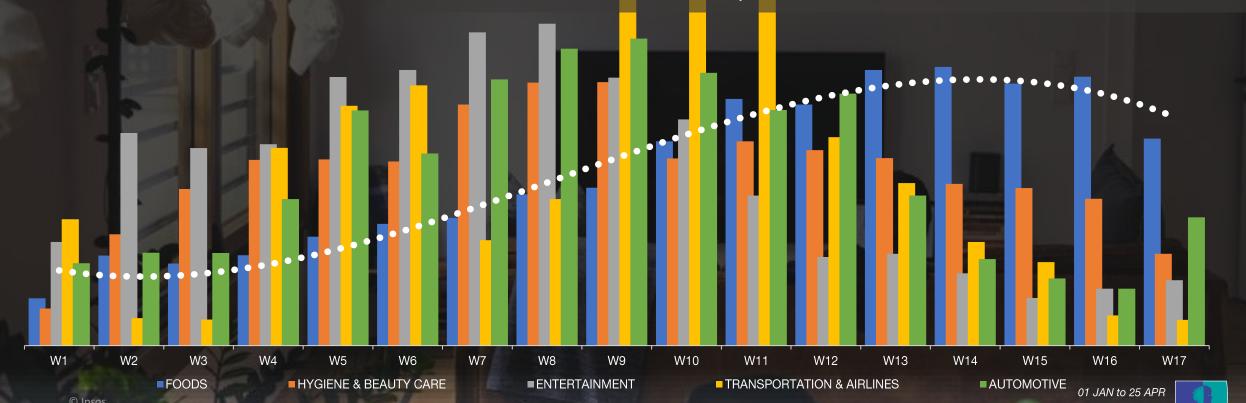
TELEVISION - 2020

#### **TOP ADVERTISING SECTORS**

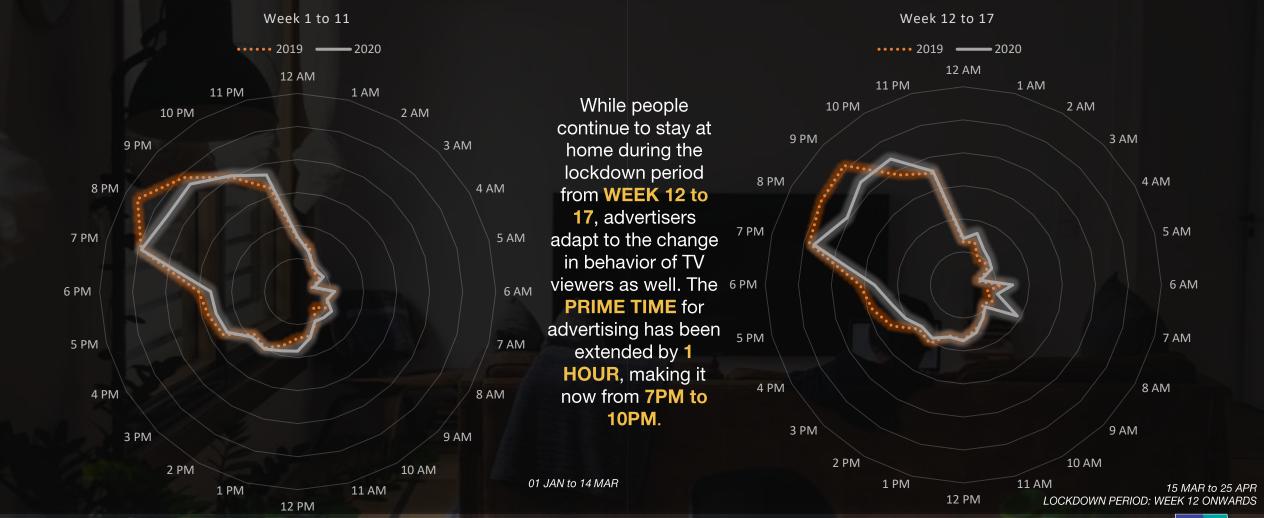
Data based on Ad Expenditure
01 JAN to 25 APR

Highlighting the flow of exponential growth in the **FOOD** industry since the pre-pandemic – WEEK 9 towards the lockdown period, it is clear that advertisers are maximizing budgets on the most essential commodity, promoting healthier food consumption for TV audiences.

While other key sectors like **ENTERTAINMENT**, **TRANSPORTATION** & **AUTOMOTIVE** which are heavily affected by the pandemic, are moving towards a downward slope as businesses continue to shut down operations.

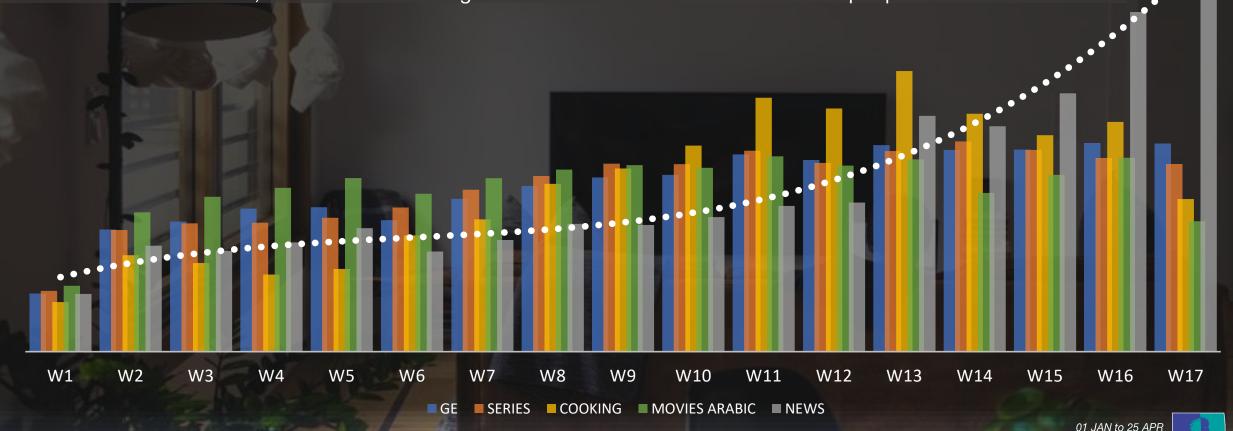


# HOW PRIME TIME IS AFFECTED FOR TELEVISION 2019 vs 2020 – PROGRAM HOUR

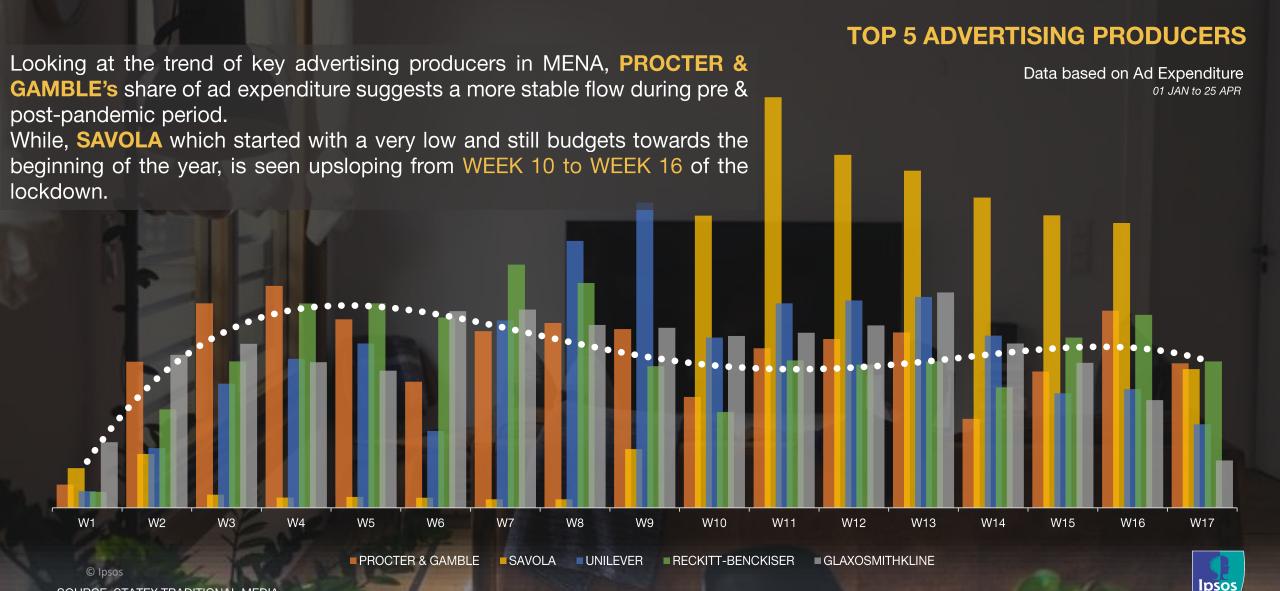


# HOW GENRE OF CHANNELS WERE AFFECTED TELEVISION – 2020

As advertisers are becoming more resilient in putting budgets nowadays, it is apparent that picking the right TV channels with high exposures to TV audiences is taken into greater consideration – **NEWS** channels for example is taking the lead which can be seen with more visible increase since WEEK 13 of the lockdown. While, **COOKING** channels on the other hand, is seen with evident growth from WEEK 11 to 13 where most people's interest are drawn.

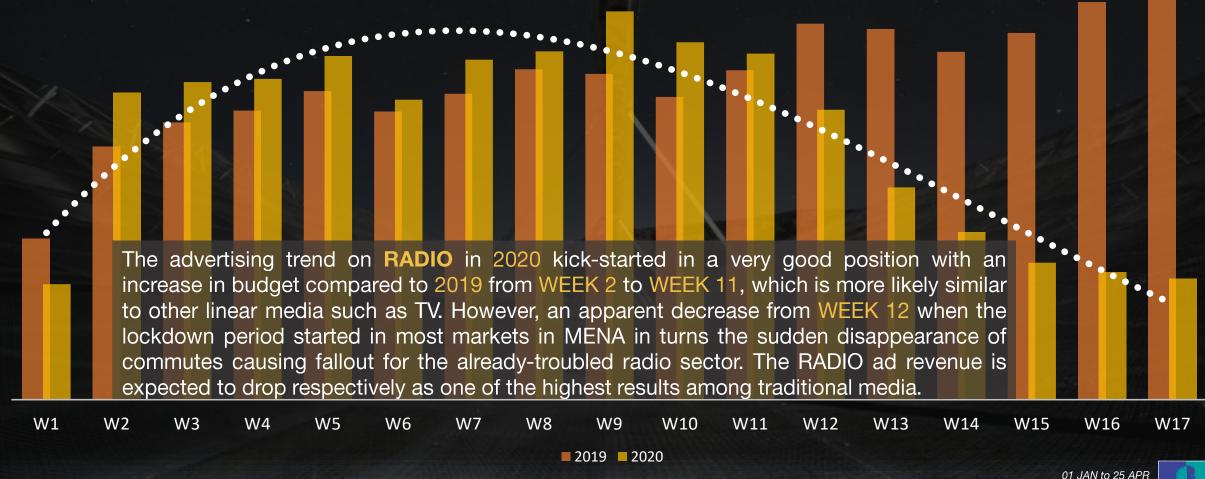


## WEEKLY ADVERTISING TRENDS OF TOP PRODUCERS TELEVISION – 2020





# WEEKLY OVERVIEW OF ADVERTISING TREND RADIO



### WEEKLY ADVERTISING TRENDS OF TOP SECTORS

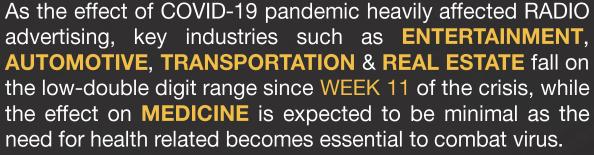
**RADIO - 2020** 

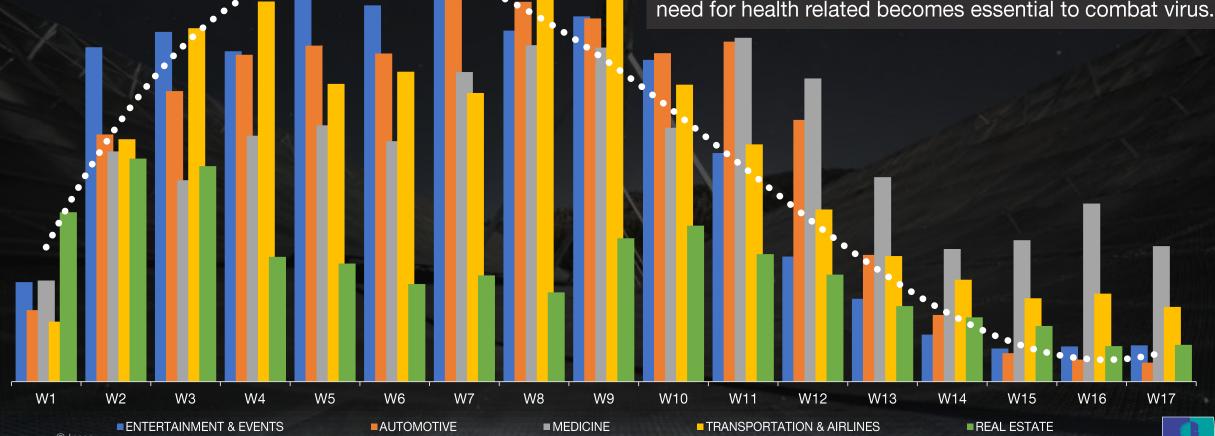
#### **TOP ADVERTISING SECTORS**

Data based on Ad Expenditure

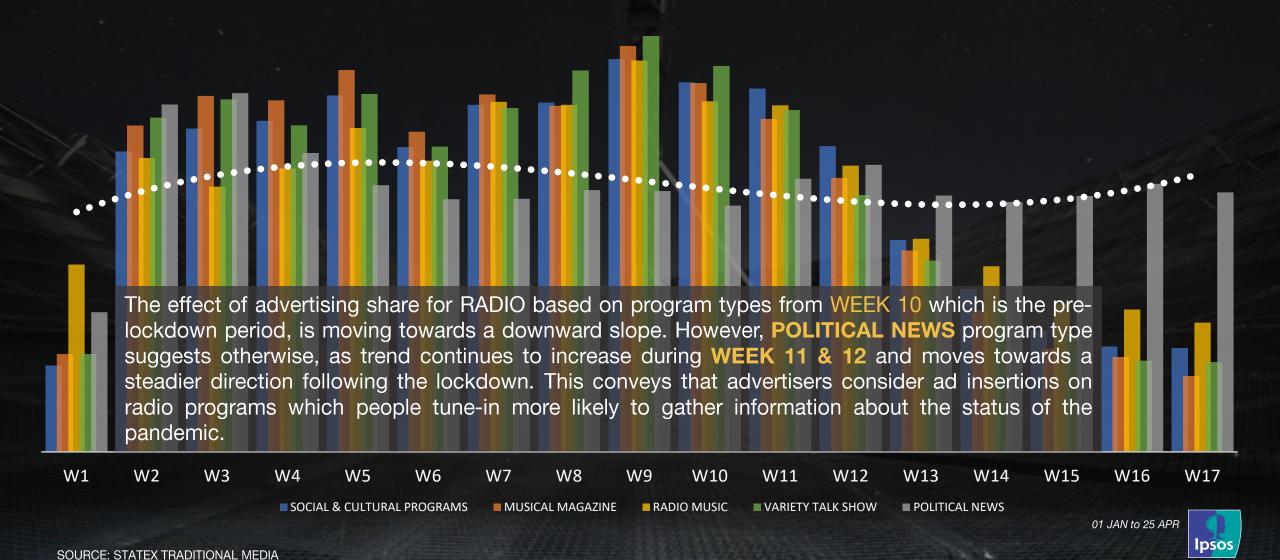
01 JAN to 25 APR

SOURCE: STATEX TRADITIONAL MEDIA





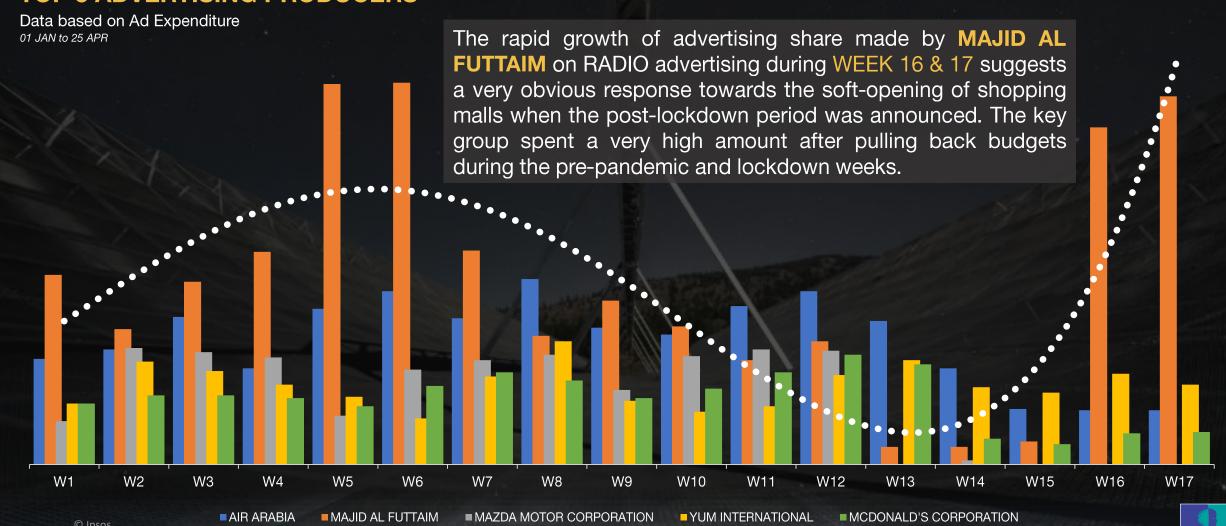
# HOW PROGRAM TYPES WERE AFFECTED RADIO – 2020



## WEEKLY ADVERTISING TRENDS OF TOP PRODUCERS RADIO – 2020

#### **TOP 5 ADVERTISING PRODUCERS**

SOURCE: STATEX TRADITIONAL MEDIA



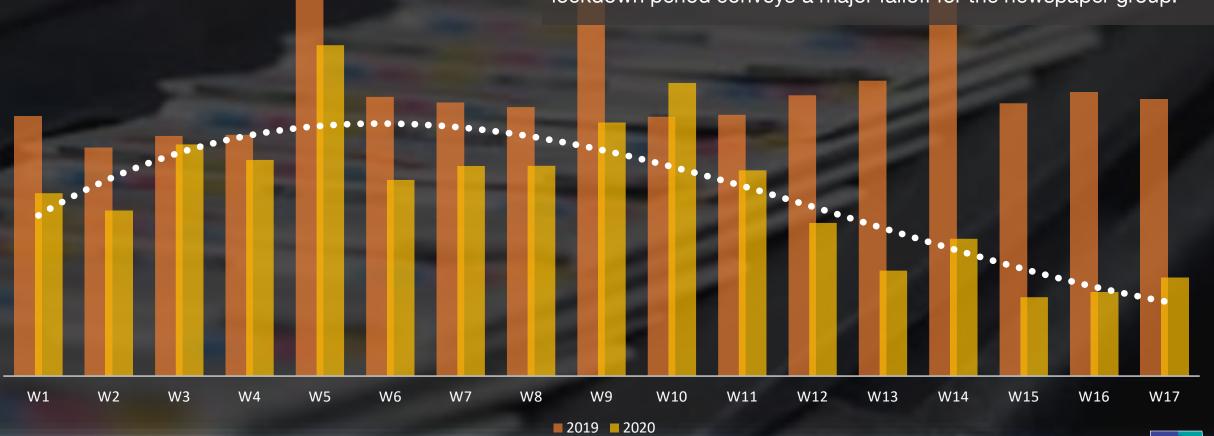
lpsos



### WEEKLY OVERVIEW OF ADVERTISING TREND

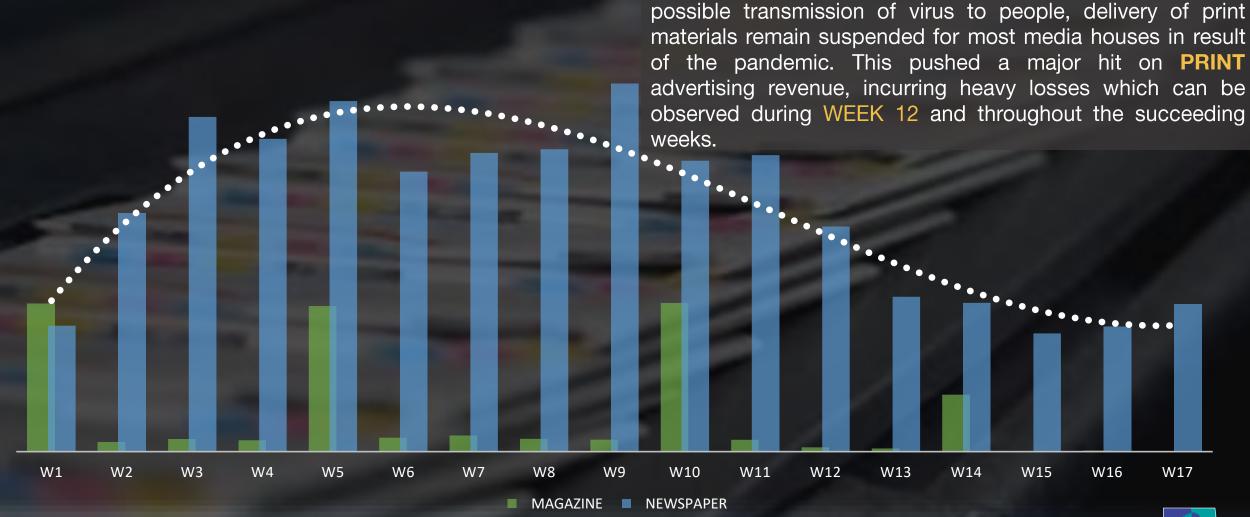
**PRESS** 

The advertising recession resulting from the COVID-19 pandemic adds new pressure to the hard-passed PRINT where the distribution has already dropped even before the crisis in 2020. While, budget surpass the 2019 share during WEEK 10, the following weeks leading to the lockdown period conveys a major falloff for the newspaper group.



### WEEKLY OVERVIEW OF MAGAZINE & NEWSPAPER

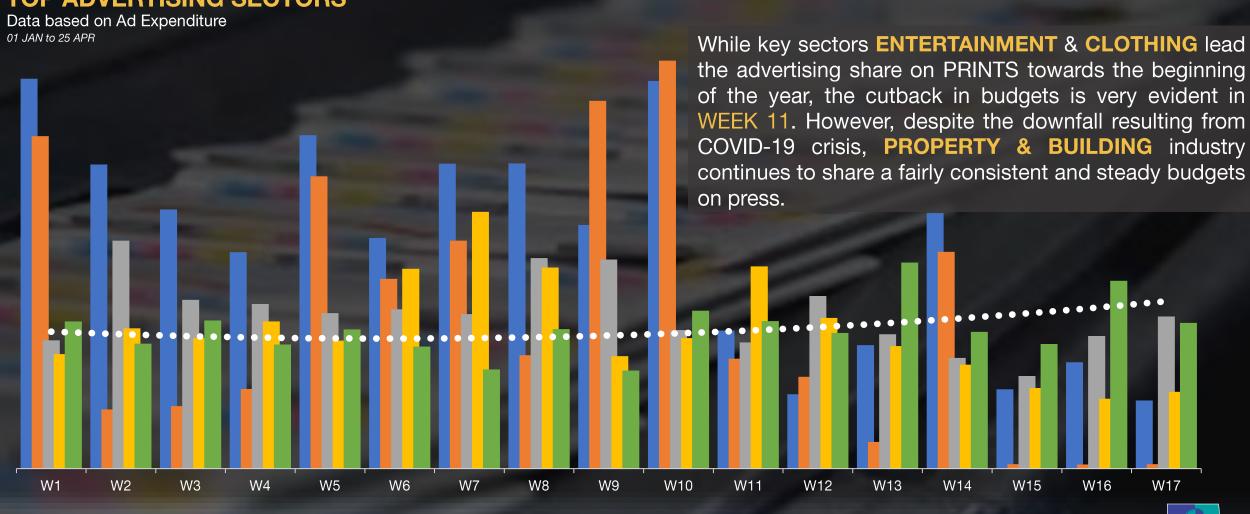
PRESS - 2020



As the distribution of **NEWSPAPER** & **MAGAZINE** threatens a

## WEEKLY ADVERTISING TRENDS OF TOP SECTORS PRESS – 2020

#### TOP ADVERTISING SECTORS



CLOTHING & ACCESSORIES



■ PROPERTY & BUILDING & ACC.

### WEEKLY ADVERTISING TRENDS OF TOP PRODUCERS PRESS - 2020

#### **TOP ADVERTISING PRODUCERS**

**SOURCE: STATEX TRADITIONAL MEDIA** 





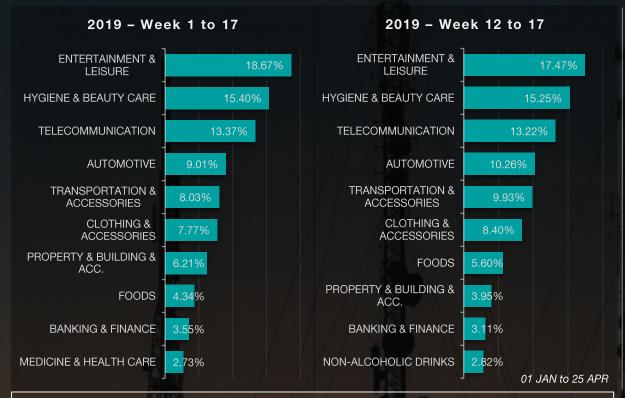
#### WEEKLY OVERVIEW OF ADVERTISING TREND - 2019 Vs 2020 DIGITAL 1.51 - 2.500 4.567

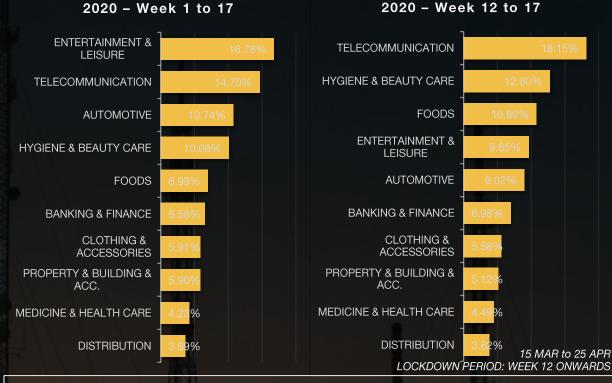


The trend in the **DIGITAL** impression for 2019 versus 2020 shows a more consistent direction towards the beginning of the year until when the PANDEMIC started where it shows different patterns for both years. In 2019, the drop of advertising share in digital from WEEK 13 is believed to have been a shift of budget to the other media in distribution of Ramadan awareness mainly on TV, while the pandemic played a different role in the online advertising for 2020 with a more steady trend since WEEK 12.

01 JAN to 25 APR

### THE IMPACT OF COVID-19 IN THE RANKING OF SECTORS -2019 Vs 2020 DIGITAL





The consistency of advertising share in **ENTERTAINMENT & LEISURE** remains a key highlight over the course of both years. Despite the crisis in March, the numbers suggest that advertisers spent good amount towards the first half of the year and significantly dropped during the outbreak. Let alone the share for **RESTAURANT** increases as the demands for deliveries become significantly higher during the lockdown.

The effect of the pandemic crisis plays a significant role in the drop of the digital spends towards **TRANSPORTATION & ACCESSORIES** mainly driven by the share of the **AIRLINE** businesses which have been affected tremendously.

And on the other side, the particular effect that COVID-19 has on the health industry, the share of advertising spends on **MEDICINE & HEALTH CARE** sector went significantly higher compared to last year.



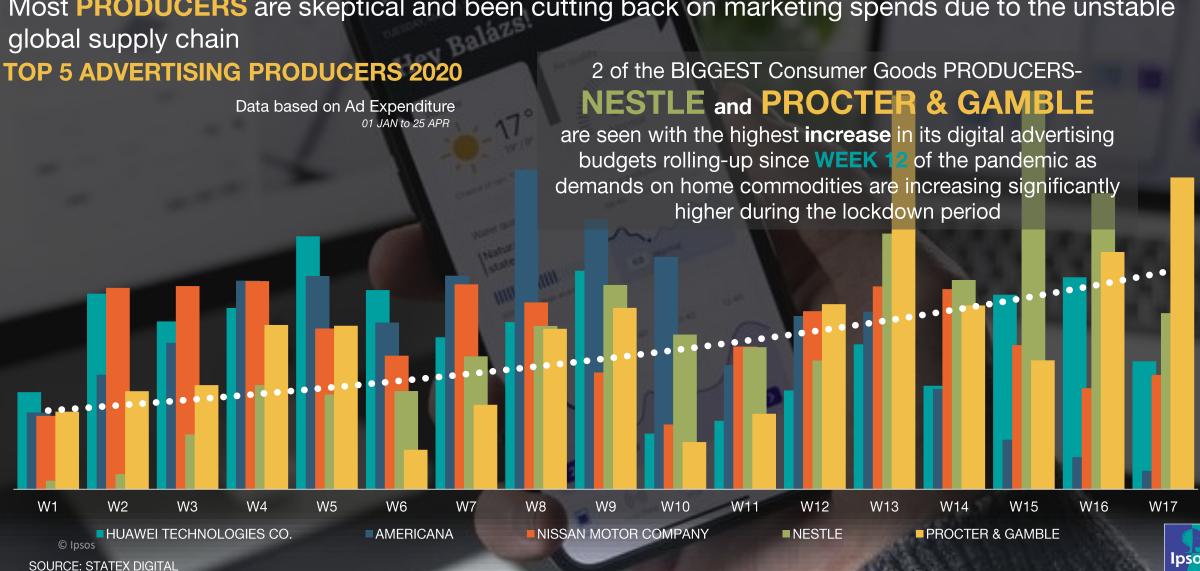
## WEEKLY ADVERTISING TRENDS OF TOP SECTORS -2020 DIGITAL

Many industries are hit by COVID-19 but not to an irreparable extent. Despite alarming reports, from a digital advertising perspective, other verticals are considering the need to invest now more than ever



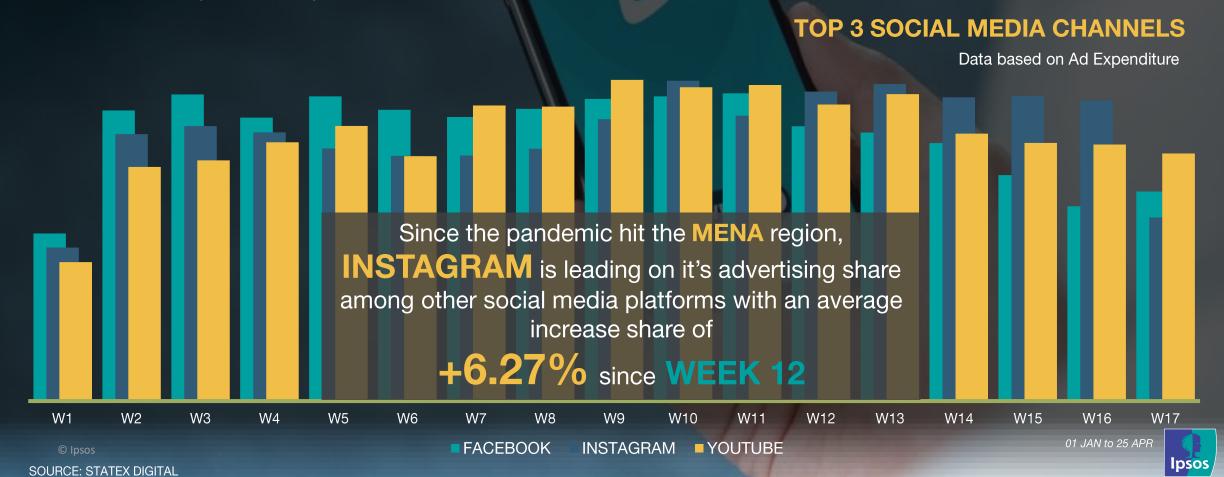
### WEEKLY ADVERTISING TRENDS OF TOP PRODUCERS -2020 DIGITAL

Most PRODUCERS are skeptical and been cutting back on marketing spends due to the unstable



### HOW ADVERTISERS ARE MAXIMIZING SPENDS ON SOCIAL MEDIA -2020 DIGITAL

As **SOCIAL MEDIA** continues to take over the digital advertising share among other advertising platforms, it is clear that advertisers are **maximizing** their digital efforts to reach audience through these top social media channels: **FACEBOOK**, **YOUTUBE** & **INSTAGRAM** with a more consistent trend since the start of the year and even towards the pandemic period with less dramatic downturn.





## IMPACT OF CRISIS TO AIRLINE INDUSTRY 2020 DIGITAL

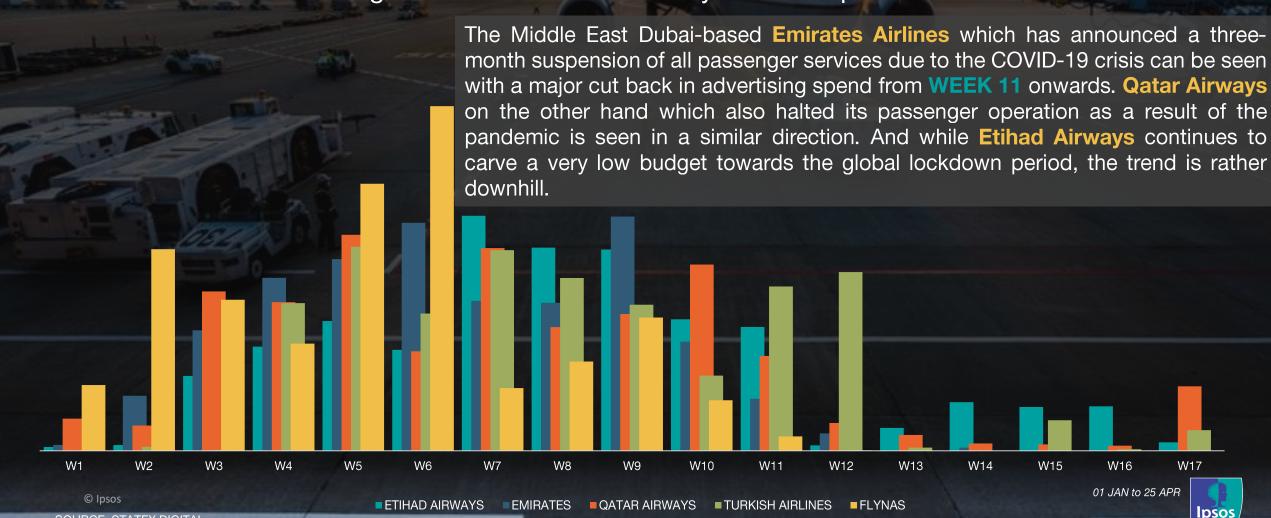
The impact of COVID-19 outbreak on **Airlines** and to the entire **Aviation & Travel industry** was rapid not only in the **MENA** region but globally. The key factors affecting the aviation industry after the pandemic include the decline in tours and travels as a large number of international as well as domestic flights are getting cancelled all across the globe to curb the transmission of the virus.





### WEEKLY TREND OF KEY COMPANIES IN THE AVIATION INDUSTRY DIGITAL

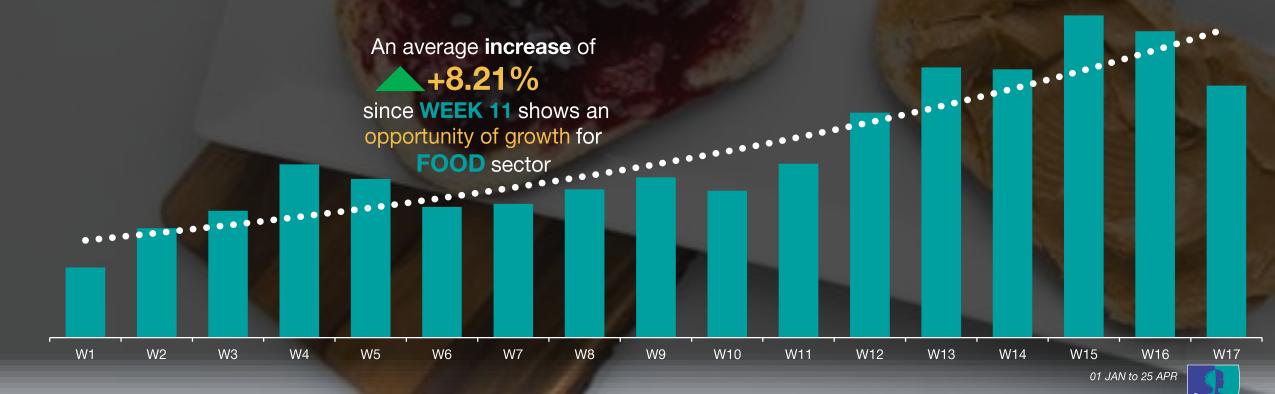
The drastic downturn of advertising trend for the key companies in the Airline industry shows that the economic shock resulting from COVID-19 has heavily affected operations in this vertical.



## IMPACT OF CONSUMER PRODUCT FOODS DIGITAL

SOURCE: STATEX DIGITAL

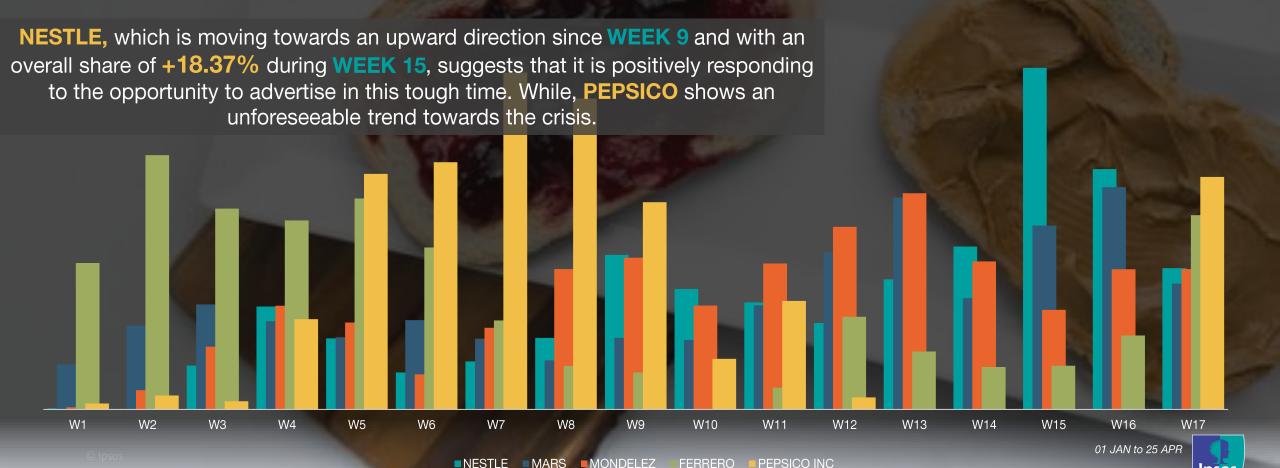
The effect of the pandemic crisis in the average-active industry **FOODS** is expected with exponential growth towards the pandemic period. It is foreseen that at-home consumption will increase as people will spend a considerable amount of time at home during the lockdown. This raises an opportunity for advertisers to target families and people staying at home to grow visibility over **increasing demands of food products**.



## WEEKLY TREND OF KEY PRODUCERS IN FOODS INDUSTRY DIGITAL

SOURCE: STATEX DIGITAL

As food producers behave unpredictably different from one another towards the result of the pandemic, most of the key producers respond significantly to the increasing demand of at-home consumptions while others pulled and cut down budgets.



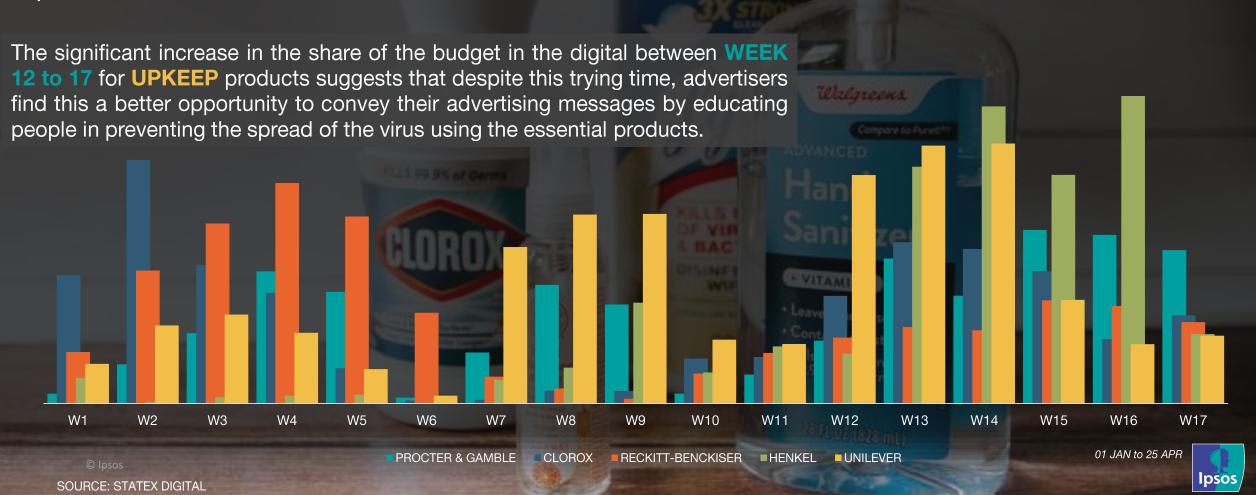
### THE INCREASING DEMAND ON ANTISEPTIC & DISINFECTANT PRODUCT 2020 DIGITAL

As the demands for ANTISEPTIC related products grow increasingly high, advertisers are putting efforts into spending on proactive ads in response to COVID-19 crisis.



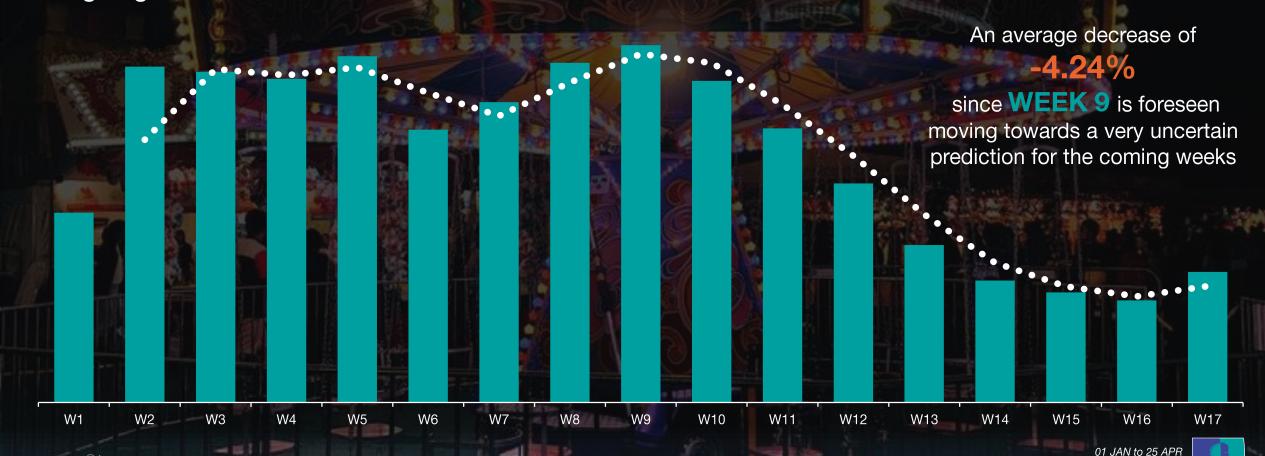
### WEEKLY TREND OF KEY PRODUCERS IN UPKEEP-ANTISEPTIC INDUSTRY DIGITAL

As the spike for antiseptic and cleaning products grow significantly high in demand across the world, producers are spending heavily online conveying positive messages in combat to the pandemic.



### THE IMPACT ON THE WEEKLY ADVERTISING TREND IN ENTERTAINMENT & LEISURE DIGITAL

As many of the businesses included in this vertical are related to physical activities and locations, it is notable that the trend in 2020 shows a downward direction due to the pandemic. People are just not going outside their homes for recreational activities.



## HOW ADVERTISERS IN LEISURE & RECREATION REACT TO THE PANDEMIC DIGITAL

As most businesses in this vertical are force-closed due to COVID-19, the negative impact on advertising trend towards the lockdown period is visible on many cases

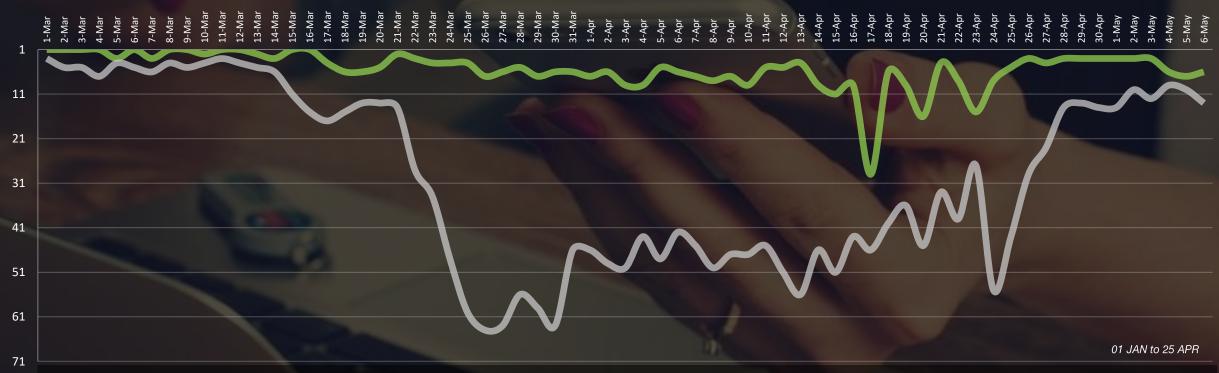




### DAILY OVERALL RANKING OF APPLICATION IN ANDROID & IOS







WHATSAPP MESSENGER on both Android and iOS platforms remained on the top ranking for overall applications towards the beginning of the year in the UAE. However, it can be seen that during the pandemic period, the ranking of the application shows different impact on both operating systems. While the effect on Android is very minimal, iOS shows a significant drop in the ranking until when the Ramadan started, where the trend is beginning to went up again.



# DAILY OVERALL RANKING OF APPLICATION IN ANDROID & IOS ZOOM CLOUD MEETINGS - UAE





**ZOOM CLOUD MEETINGS** software application's popularity and demand on both mobile operating systems- Android and iOS has changed its course since when the pandemic hit the region during WEEK 12 when pre-lockdown was announced in the country. User's download of the application shows a very drastic turnaround in it's overall ranking among other applications in store. This suggests that demands over video conferencing applications become significantly higher as people find ways to stay connected virtually.



# DAILY OVERALL RANKING OF APPLICATION IN ANDROID & IOS MICROSOFT TEAMS- UAE







MICROSOFT TEAMS application has not been so popular on mobile platforms during the beginning of the year in the UAE until the pandemic crisis has changed its course and popularity as people started downloading the application in mobile for both Android and iOS systems more than ever during the start of March. However, as ZOOM is gaining more popularity on video conferencing more than MICROSOFT TEAMS, it has remained in the top second position until 6th of May for both OS.



