CASE STUDY

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How video on demand changed advertising in Egypt

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Streaming, connected TV and short clips have split the audience Egyptian television once gathered in one place. How Ramadan advertising now reaches viewers, and what advertisers need to measure.

Video on demand has not replaced television in Egypt, but it has changed how an advertiser reaches the audience that television once delivered in one place. In Ramadan 2025, an estimated 70% of viewers watched Ramadan content through streaming platforms or social media, in full episodes or in short clips ([CairoScene](https://cairoscene.com/artsandculture/aim-technologies-reveal-which-ads-shows-series-won-ramadan-2025)). Television still carries the largest single share of Ramadan spending, while digital advertising in Egypt grew 23.1% in 2025, the fastest rate of any market in the region ([Campaign Middle East](https://campaignme.com/digital-ad-spend-in-mena-reaches-8b-in-2025-iab-report-reveals/)).

The result is a market in which the same series reaches its audience through a broadcast slot, a subscription platform, a free ad-supported tier and a stream of clips, each with its own advertising model and its own measure of success.

Ramadan: still the center of the year, now on several screens

Ramadan remains the peak of Egypt's advertising calendar. Advertising spend in Egypt during Ramadan 2025 was estimated at USD 500 to 600 million, led by real estate and telecom ([Annahar](https://en.annahar.com/en/business-tech/279215/ramadan-advertising-in-the-arab-world-set-to-surpass-2-billion-in-2026-tv-holds-strong-social-media-surges)). Real estate developers alone spent more than EGP 2 billion over the month ([Daily News Egypt](https://www.dailynewsegypt.com/?p=830295)). Industry estimates for the region place 35 to 40% of a year's total ad spend in Ramadan ([ArabAd](https://arabadonline.com/en/article/4902-Ramadan-in-Numbers-Unpacking-Key-Viewership-Streaming-and-Advertising-Insights)).

What has changed is where the Ramadan audience watches. More than half of respondents in Egypt, Saudi Arabia and the UAE said they would spend more time streaming on connected TV than watching traditional TV during Ramadan 2025 ([Campaign Middle

East](https://campaignme.com/capitalising-on-ramadans-digital-shift-towards-connected-tv/)). Regional viewing data shows streaming peaking between 7 PM and 2 AM, with around half of streamers tuning in after iftar.

For advertisers, this means the premium Ramadan slot still buys reach at the moment of premiere, while a growing share of total viewing happens afterwards, on platforms where the ad break looks different or does not exist.

The platforms and their two models

Egypt's streaming market is shaped by a local platform built around Egyptian drama and a regional platform with the largest subscriber base in the Arab world, alongside global services.

WATCH IT, launched in 2019 by United Media Services, carries the group's original productions and its channels' live feeds. Its launch moved most Egyptian series off free online viewing after their broadcast run ([Al-Monitor](https://app.al-monitor.com/originals/2019/05/egypts-homegrown-steaming-service-has-tough-start.html)). For the first time, the audience for a premium Egyptian series could be reached through a paid platform rather than only through broadcast and free video sites.

MBC Shahid runs both models side by side: a subscription tier and a free tier funded by advertising. It reached about 5 million subscribers at the end of 2024 and 18.6 million monthly users on its free tier ([Communicate](https://communicateonline.me/news/shahid-becomes-mbc-shahid-as-group-aligns-streaming-with-broadcast-strategy/)). In 2025 its revenue grew 28.2% to SAR 1.38 billion, with subscription revenue up 25.4% and advertising revenue up 27.1% to SAR 236.1 million ([World Screen](https://worldscreen.com/?p=339544)). MBC credits the advertising growth to new ad formats and higher fill rates during the Ramadan peak.

Across the region, subscription video subscriptions were expected to pass 27 million in 2025, with the online video market forecast to reach USD 8.4 billion by 2029 ([Broadband TV News](https://www.broadbandtvnews.com/2025/05/13/svod-growth-to-take-mena-streaming-market-past-1-5-billion-in-2025/)).

The two models create two audiences for the same content. Subscribers to ad-free tiers can be reached only through sponsorship, product integration or other channels, while free-tier viewers can be reached with targeting that broadcast cannot offer.

Where the money is moving

Egypt's advertising market is estimated at about USD 1.2 billion, with digital accounting for roughly half of spend, compared with close to 70% in the UAE ([Communicate](https://communicateonline.me/focus/cannes-lions/the-11-billion-market-the-world-cant-ignore/)). Egypt's digital spend grew 23.1% in 2025, within a regional digital market that reached USD 8.2 billion ([Campaign Middle East](https://campaignme.com/digital-ad-spend-in-mena-reaches-8b-in-2025-iab-report-reveals/)). The region's digital advertising body included connected TV as a separate category in its annual estimate for the first time that year ([Communicate](https://communicateonline.me/insights/menas-8-2bn-digital-ad-economy-signals-a-deeper-shift-in-how-brands-buy-attention/)).

The shift has not come only at the expense of television. Outdoor advertising in Egypt grew 60% in 2025 to EGP 12.7 billion, led by automotive, banking and FMCG ([Alam Rakamy](https://alamrakamy.com/article/86208)). Advertisers are spreading budgets across more channels rather than moving them from one channel to another, which makes the question of how each channel contributes harder to answer.

Five changes for advertisers

1. **Reach is built over days, not in one slot.** A Ramadan series now reaches its audience across the broadcast premiere, a streaming catch-up window and a long tail of clips. Planning reach around the premiere slot alone undercounts the audience and the frequency a campaign actually achieves. 2. **The same content has two audiences.** Subscribers on ad-free tiers are reached through sponsorship and product integration, while free-tier viewers see ads that can be targeted. A brand that relies on spot advertising reaches only part of a series' audience. 3. **Advertisements have a second life.** Ramadan commercials are watched, shared and discussed on social platforms well after they air. The creative itself has become content, and its performance online is now part of how a campaign is judged. 4. **Targeting and formats have widened.** Ad-supported streaming tiers offer audience targeting and formats that broadcast does not offer. MBC attributes part of its streaming ad growth to these new formats. 5. **Measurement no longer adds up on its own.** Broadcast ratings, platform viewing data and social engagement are reported in different units by different sources. No single figure tells an advertiser how many people saw a campaign across all of them.

What advertisers need to measure now

Platform dashboards report what happened on each platform. The advertiser's question spans all of them, and it concerns people rather than impressions: who saw the campaign, where, how often, and

what it changed.

| Question | What it informs | Typical approach | | --- | --- | --- | | How the target audience divides its viewing across broadcast, streaming tiers and clips | The split of budget between spots, sponsorship and digital video | Cross-platform media consumption survey | | Which audiences are on ad-free tiers, and what reaches them | The value of sponsorship and integration versus spot advertising | Segmentation of viewers by platform and tier | | Whether the campaign was recalled and linked to the brand, by platform | Which channels earn their share of the budget | Post-campaign recall and brand linkage tracking | | How the creative performs before it airs | Which execution to run in the most expensive weeks of the year | Pre-testing of advertising concepts and films | | What changed in brand perception after Ramadan | Whether the season's investment moved the brand | Pre and post brand health measurement |

These measures sit with the advertiser rather than with any one platform, and they are most useful when designed before the season begins, so that the post-season reading has a baseline to compare against.

Sources

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