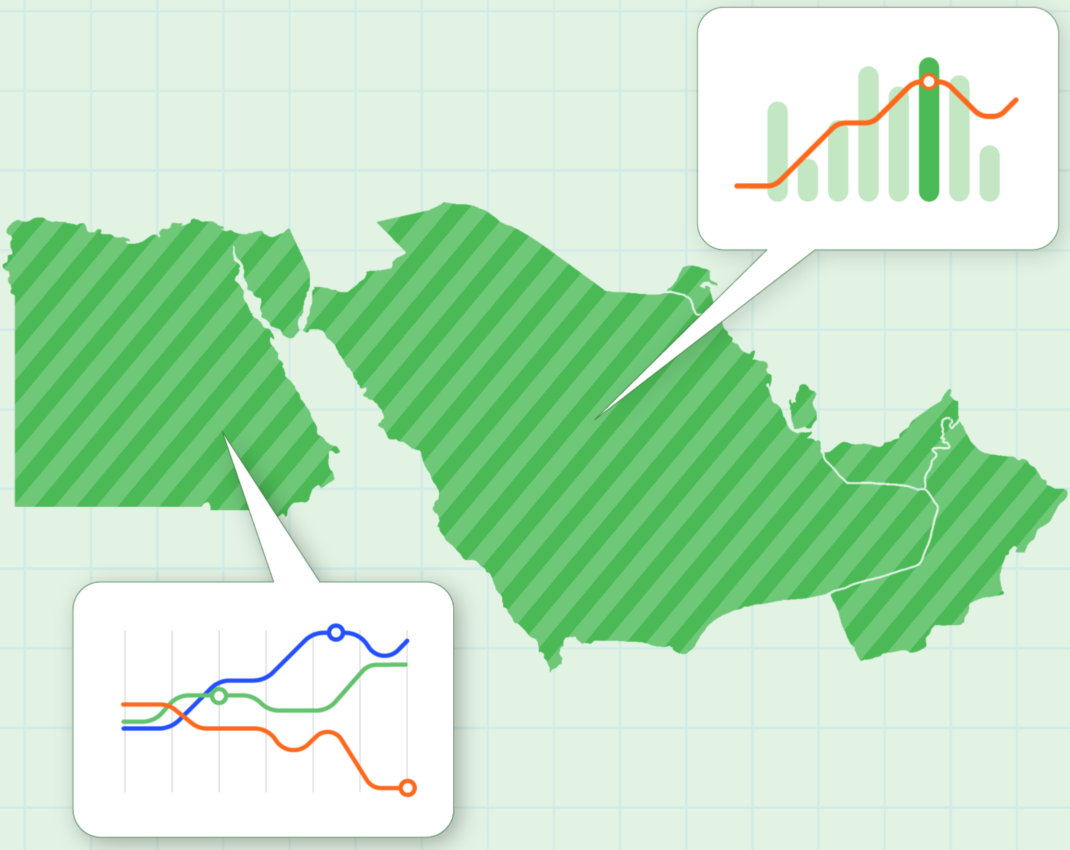
The 2025 Middle East App Growth Report

Inside the Shifts in Spend, Strategy, and Consumer Behavior Driving the Region's App Economy



FALL 2025

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Introduction

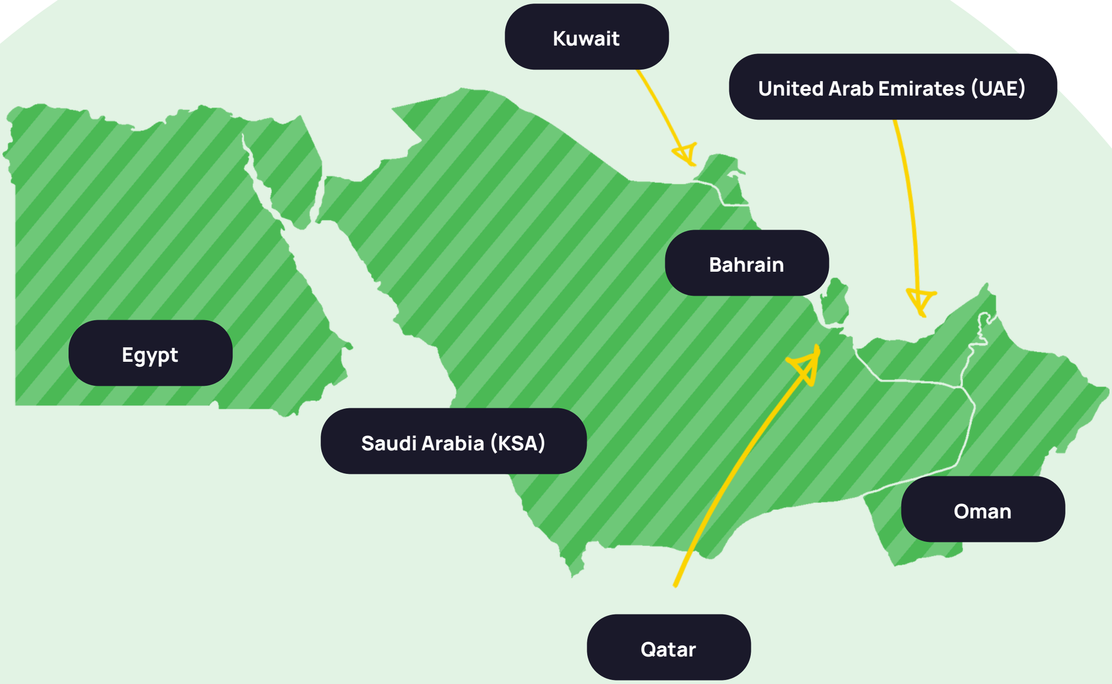
This report arrives at a pivotal moment for app marketers in the region. Q4 2025 represents not just the busiest season of the year, but the crucial window when teams finalize budgets and architect strategies for 2026. Success requires navigating both imperatives simultaneously.

The 2025 Middle East App Growth Report is built for this dual challenge. By synthesizing market intelligence from Sensor Tower with ground truth from 425 regional app marketers, we surface the patterns that matter now and the shifts shaping tomorrow: how budgets are moving between UA, brand, and retention; which channels and platforms are delivering consistent scale — and which are falling short; and how seasonality, AI, and market maturity are reshaping strategies for 2026.

This report provides the strategic clarity teams need to capitalize on immediate opportunities while building the foundation for the year ahead.

Executive Summary

The 2025 Middle East Mobile App Growth Report combines **Sensor Tower's market intelligence** with insights from **425 app marketers across KSA, UAE, and the wider region (surveyed Aug 2025)**. Together, they reveal a market that's expanding faster than global benchmarks—and teams doubling down on user acquisition and AI to capture that growth while adapting to shifting seasons, saturation, and evolving privacy rules.



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Key Insights

Where The Market Is Moving

Middle East growth outpaces global

Downloads up 2.6% YoY in Q2 2025 vs 0.5% globally; IAP surpassed $700M (+20% YoY) with the UAE leading revenue growth at +26%; time in apps crossed 20B hours.

Category standouts

Finance and Food & Dining led download growth (+>30% YoY). Software IAP revenue rose 77% YoY on AI-driven apps; ChatGPT ranked #3 by revenue after TikTok and Shahid. Within Finance, Digital Wallets and Consumer Banking led adoption.

Competition & formats

Global entrants (Temu, SHEIN, Alibaba.com, AliExpress) expanded, while built-in-region shopping apps held share in KSA and gained in the UAE. Super-app momentum accelerated across the GCC.

Seasonality & cycles

Shopping downloads spike >30% around Ramadan and Black Friday. Finance app activity follows salary cycles, peaking at month-end in KSA and showing a different pattern in the UAE.

Key Insights

How Marketers Are Responding

UA stays central, brand/retention amplify

Most plan to increase UA (56%) and retargeting (51%), while brand awareness (67%) and retention (41%) rise to differentiate and build durable value.

Video dominates budgets; performance at scale is execution-sensitive

Increases concentrate on TikTok (80%) and YouTube (80%), yet sizable shares also trim spend (TikTok 48%; YouTube 42%) as teams reallocate when results aren't consistent.

AI is in production with high creative velocity

Marketers use AI for ad creative generation (64%), personalization (53%), budget allocation (47%), and optimization (40%); 46% refresh creatives weekly and 32% multiple times per week, supported by creative automation (60%) and GenAI tools (48%).

Regional dynamics: Shifting seasons, real saturation, mature measurement

61.41% see new seasonal windows; 52.00% cite saturation in KSA/UAE. Privacy headwinds are led by limited first-party data (44%) and changes like Consent Mode/GA4 (50%) and Android privacy (47%)—yet MTA (54%) and incrementality (50%) outpace last-click.

Methodology

This report combines market intelligence from Sensor Tower and survey insights from Bidease to provide a comprehensive view of mobile app growth in the Middle East.

Sensor Tower Methodology

Data in this report was sourced from Sensor Tower's Mobile App Insights platform, covering iOS App Store and Google Play downloads and in-app purchase (IAP) revenue from January 2023 to June 2025.

All figures represent unique installs per user account and gross IAP revenue (inclusive of app store fees). Android data reflects Google Play Store only. The GCC region includes Saudi Arabia, United Arab Emirates, Kuwait, Qatar, Bahrain, and Oman.

Survey Design

Survey participants
425 mobile growth marketers in the Middle East

Countries
UAE, Saudi Arabia, Qatar, and Egypt

Survey period
August 2025

Screening Criteria

Experience level
Moderate to extensive programmatic advertising experience

Exclusions
No experience with programmatic or non-app marketers

Survey Structure

Topic areas covered

- Budgets & future spend
- Technology & channels (including AI)
- Team design & resourcing
- Regional dynamics (seasonality, saturation, privacy/measureme

WHERE THE MARKET IS MOVING

The State of the App Market in the GCC

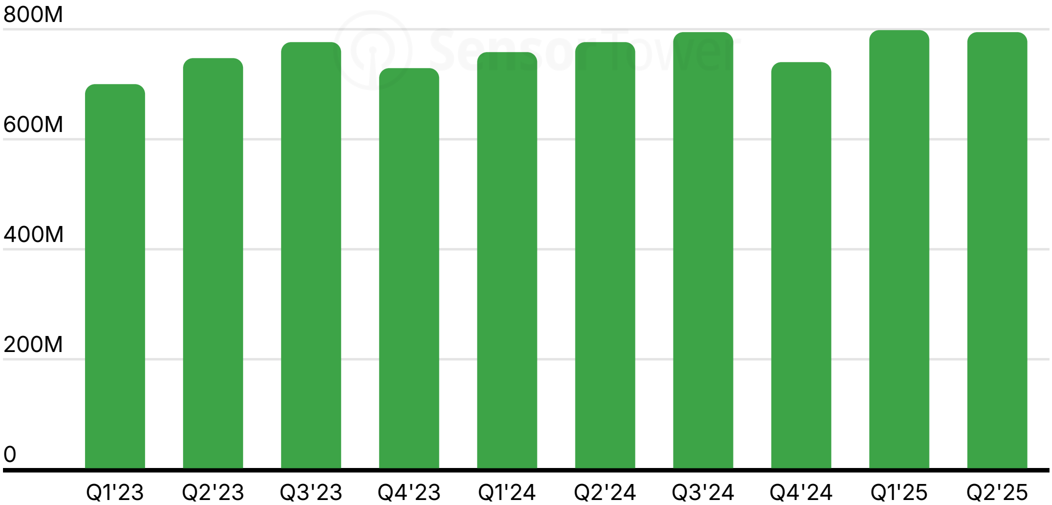
The Gulf's app economy continues to grow faster than global averages. Downloads, spend, and time spent in apps all point to a strong, expanding market. Engagement remains high across major categories, supported by steady revenue momentum. This foundation sets the tone for how marketers will plan and prioritize growth in 2026.

GCC App Economy Outpaces Global Growth

Q1 2023-Q2 2025, IOS AND GOOGLE PLAY

Downloads

GCC Region

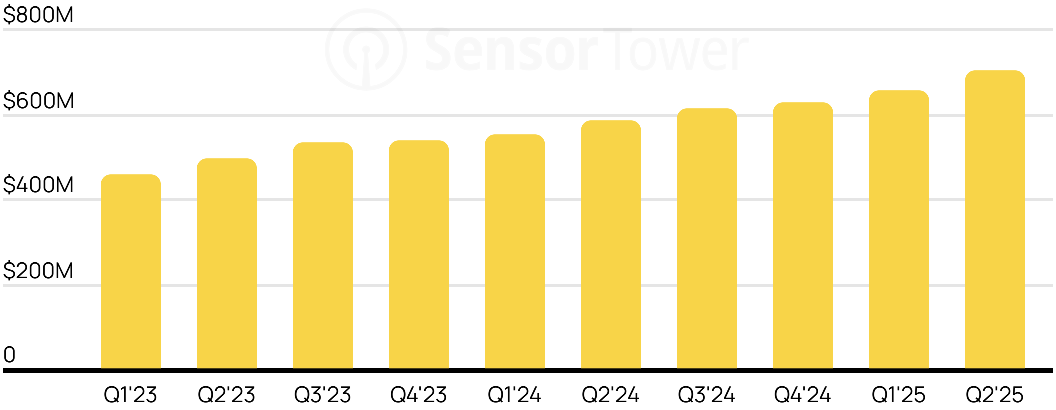


- The mobile app market is strong across the GCC countries. Downloads in the region were up 2.6% year-over-year (YoY) in Q2 2025, compared to just 0.5% YoY growth globally.

Note: iOS and Google Play combined. In-app pruchase (IAP) revenue is gross — inclusive of any percent taken by the app stores., GCC region includes Saudi Arabia, United Arab Emirates, Kuwait, Qatar, Bahrain, and Oman.

In-App Purchase Revenue

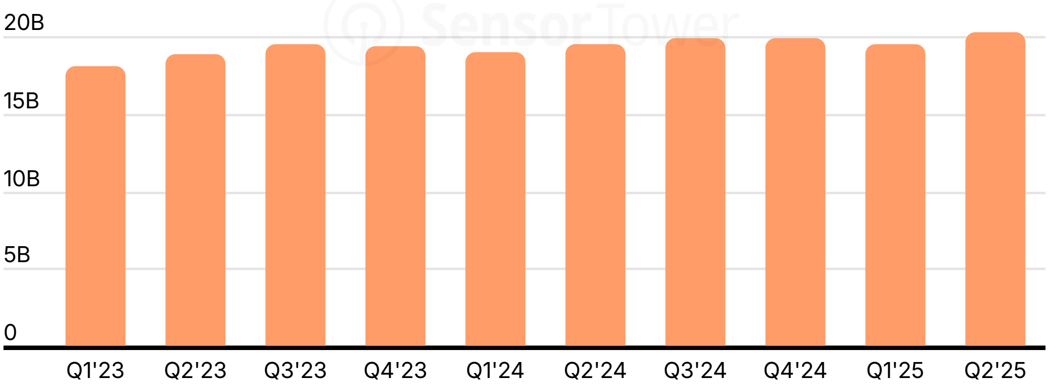
GCC Region



- In-app purchase (IAP) revenue in the region continued to soar, surpassing $700 million in Q2 2025 (+20% YoY), outpacing the 13% global rate. Revenue growth was particularly strong in the UAE (+26% YoY in Q2 2025).

Time Spent (Hours)

GCC Region



- Total time spent in the GCC surpassed 20 billion hours for the first time in Q2 2025, up 4% YoY.

WHERE THE MARKET IS MOVING

Category Growth and Emerging Leaders

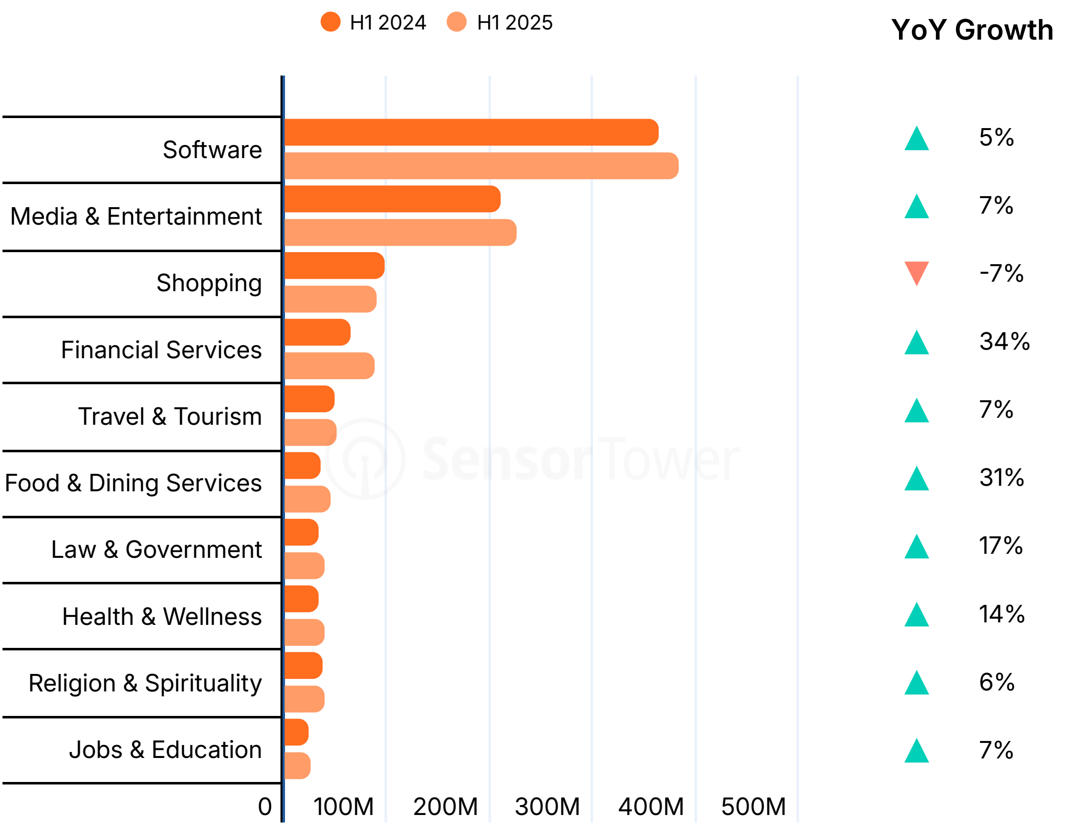
Growth is strongest in high-engagement verticals. Finance and Food & Dining continue to lead by downloads, while AI-powered Software apps drive revenue gains. Within Finance, Consumer Banking and Digital Wallets lead adoption, with Buy Now Pay Later usage rising in Oman, Kuwait, and Qatar. Convenience, trust, and utility now define where users spend time and money.

Finance and Food & Dining Capture Download Momentum

TOP APP GENRES IN GCC, IOS AND GOOGLE PLAY

Downloads

GCC Region



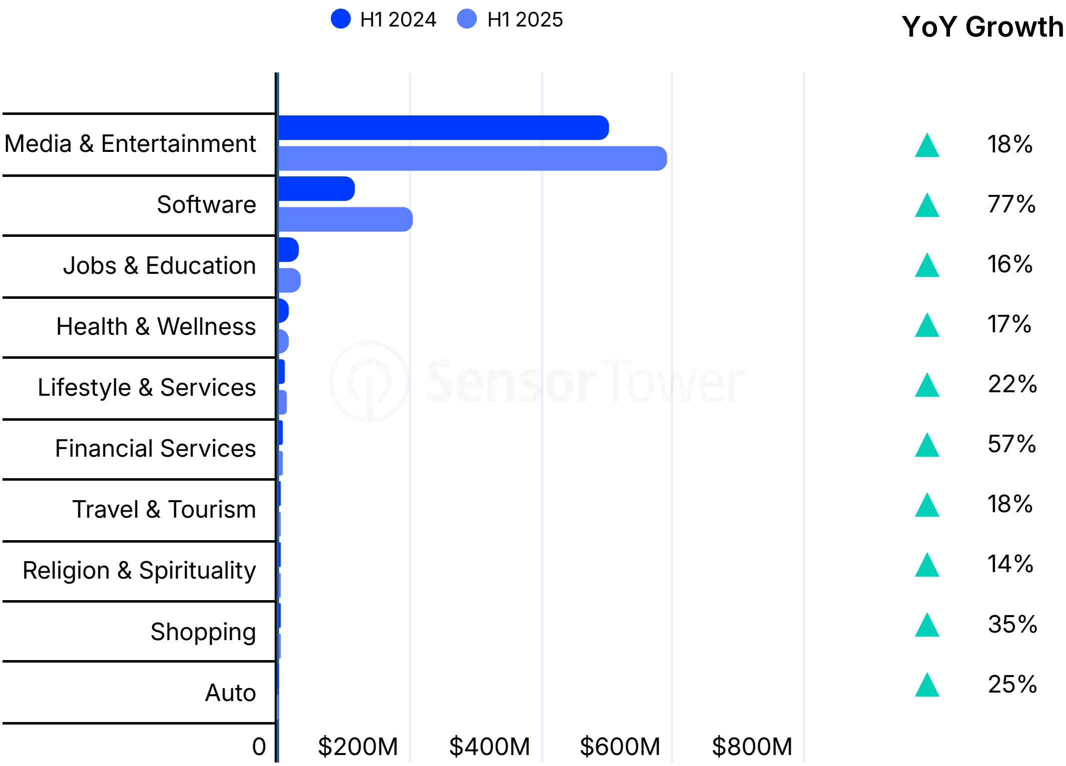
- Finance and Food & Dining led download growth in H1 2025, with both genres exceeding 30% YoY growth in the GCC. Consumer Finance apps (Banking, Digital Wallets & P2P Payments) and Lending apps were the main drivers of Finance app download growth.

AI and Entertainment Apps Drive Revenue Growth

TOP APP GENRES IN GCC, IOS AND GOOGLE PLAY

In-App Purchase Revenue

GCC Region



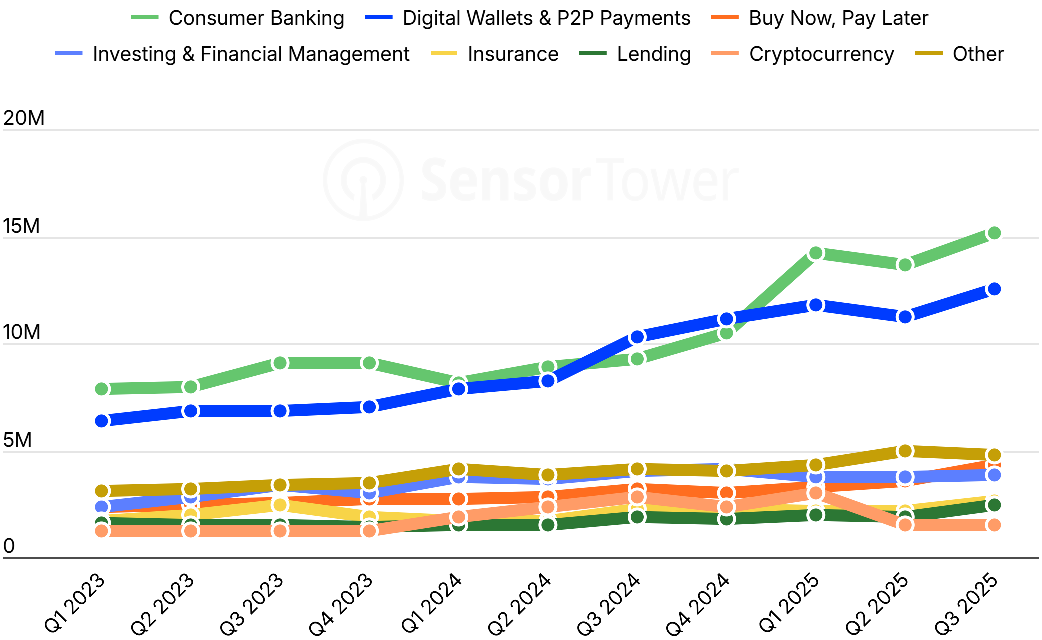
- All top genres saw strong IAP revenue growth in H1 2025 (each one surpassed 15% YoY growth).
- AI gave a nice boost to the Software genre as revenue climbed 77% YoY. ChatGPT ranked #3 overall by revenue in the region in H1 2025, only behind TikTok and Shahid.

Note: iOS and Google Play combined. In-app pruchase (IAP) revenue is gross — inclusive of any percent taken by the app stores., GCC region includes Saudi Arabia, United Arab Emirates, Kuwait, Qatar, Bahrain, and Oman.

Financial Innovation Rises, While Crypto Stays Niche

DOWNLOAD TRENDS BY FINANCE SUBGENRE IN GCC IOS AND GOOGLE PLAY

GCC Region



- As we saw earlier (#3), Financial Services was the fastest growing genre by downloads in H1 2025 in the GCC.
- The leading subgenres, Consumer Banking and Digital Wallets & P2P Payments, both saw strong growth.
- Buy Now Pay Later adoption saw a nice uptick in Q3 2025, including spikes in Oman, Kuwait, and Qatar.
- Crypto apps still have relatively low downloads in the GCC despite a bit of a surge from Q1 2024 - Q1 2025.

Note: iOS and Google Play combined. GCC region includes Saudi Arabia, United Arab Emirates, Kuwait, Qatar, Bahrain, and Oman.

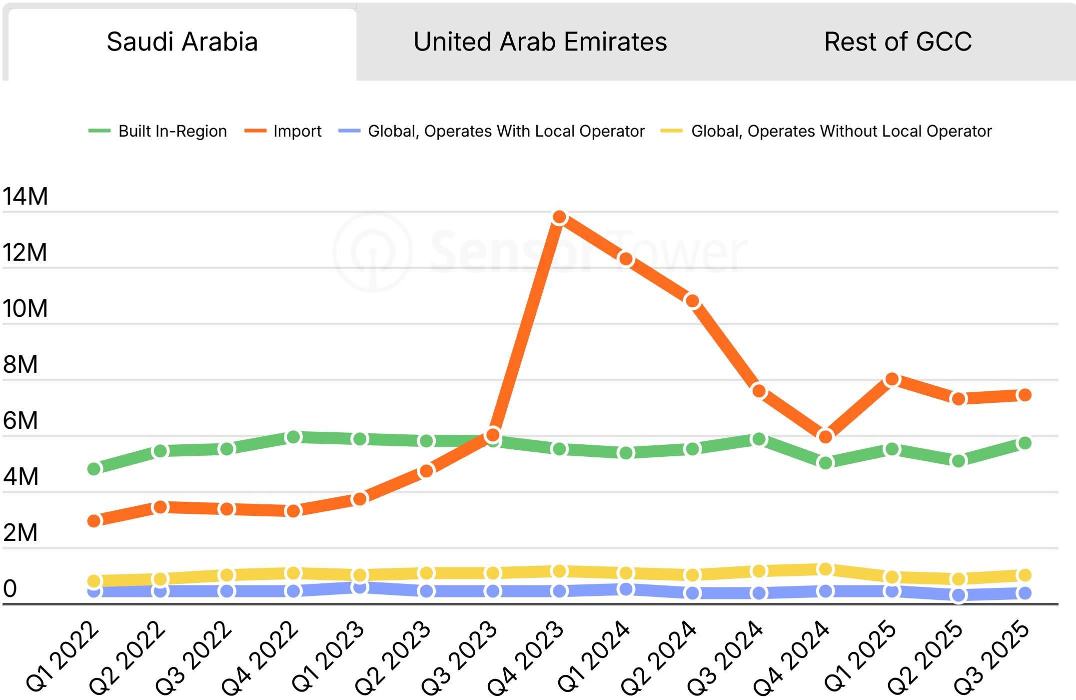
WHERE THE MARKET IS MOVING

Competition and the Rise of Super Apps

Competition in the GCC app market is accelerating. Global platforms are expanding while local ecosystems remain resilient. Telecom, fintech, and delivery companies are introducing multi-service offerings that merge communication, payments, and commerce. These shifts are redefining how consumers access services and interact with brands.

Global Entrants Expand, But Local Shopping Apps Hold Ground

SHOPPING DOWNLOADS BY LOCAL VS. GLOBAL PUBLISHERS IN GCC, IOS AND GOOGLE PLAY



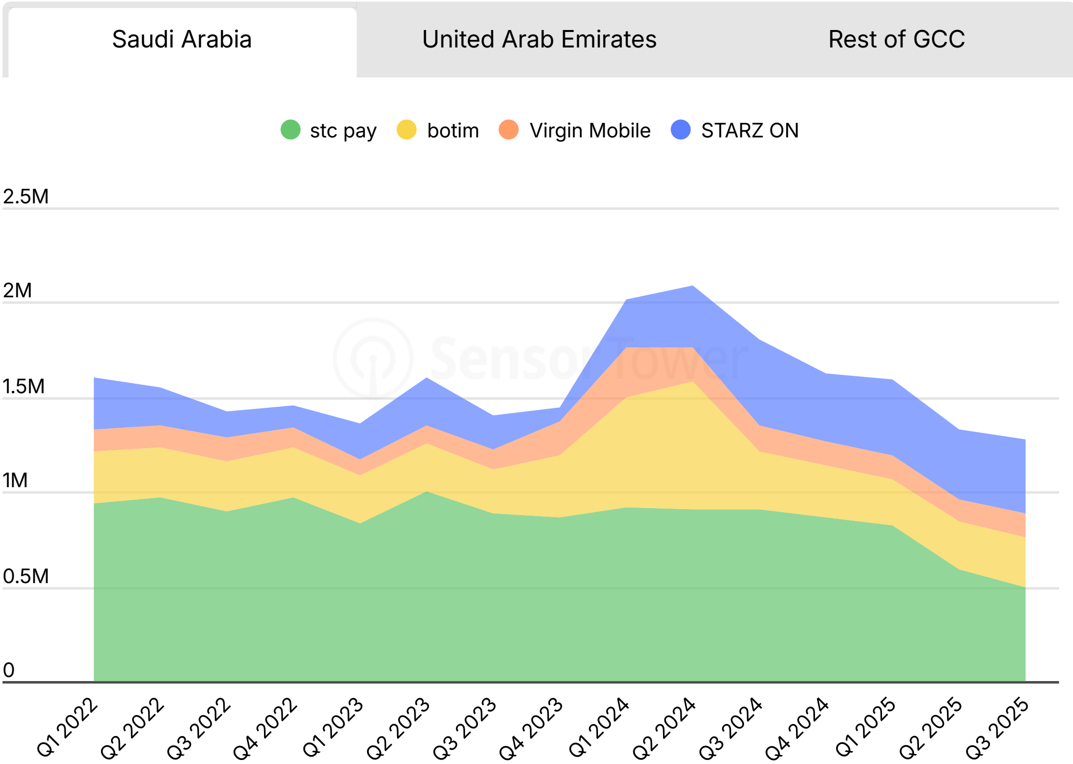
- A few Chinese-backed etailers expanded into the GCC, including Temu making a big push in the region starting in late 2023. SHEIN, Alibaba.com, and AliExpress were other notable imports.
- Interestingly, the competition from these imports did not result in a significant decline in downloads from built-in region competitors. Built-in Region downloads held steady in Saudi Arabia and actually increased in the UAE.

Note: iOS and Google Play combined. Rest of GCC region includes Kuwait, Qatar, Bahrain, and Oman. Downloads the top 30 Shoping apps in the region.

Super-App Momentum Accelerates Across the GCC

DOWNLOADS TREND FOR SELECT "SUPER APPS" IN GCC IOS AND GOOGLE PLAY

Telecom and streaming

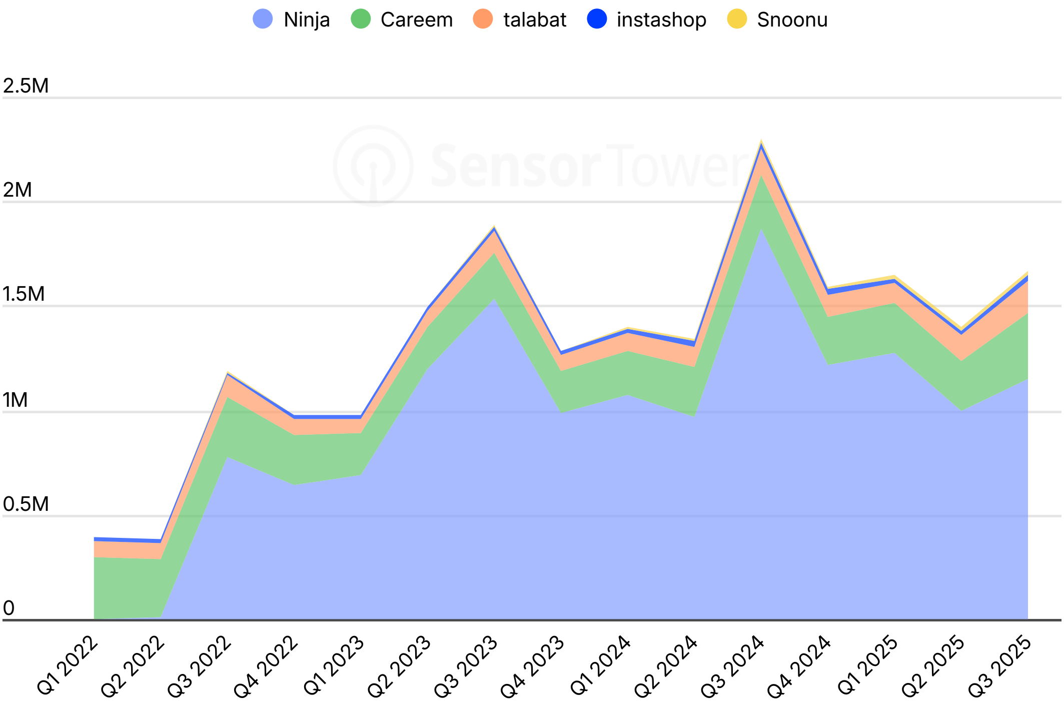


- We've seen apps expand their features and use cases beyond their original category. For example, botim includes a number of features, from money transfers to video calls to AI assistance.
- stc pay and STARZ ON exemplify how regional telecoms are expanding beyond connectivity—into finance, media, and lifestyle ecosystems.
- Virgin Mobile MEA, acquired by Beyond ONE, signals the same direction, layering fintech and digital services on top of its core mobile offering.

DOWNLOADS TREND FOR SELECT "SUPER APPS" IN GCC IOS AND GOOGLE PLAY

Food delivery

Saudi Arabia | United Arab Emirates | Rest of GCC



- While individual app performance varies, overall downloads for these app in the GCC is on the rise. This is particularly true in the food delivery space, which has expanded to delivering other products like groceries and pharmacies.

Note: iOS and Google Play combined. Rest of GCC region includes Kuwait, Qatar, Bahrain, and Oman.

WHERE THE MARKET IS MOVING

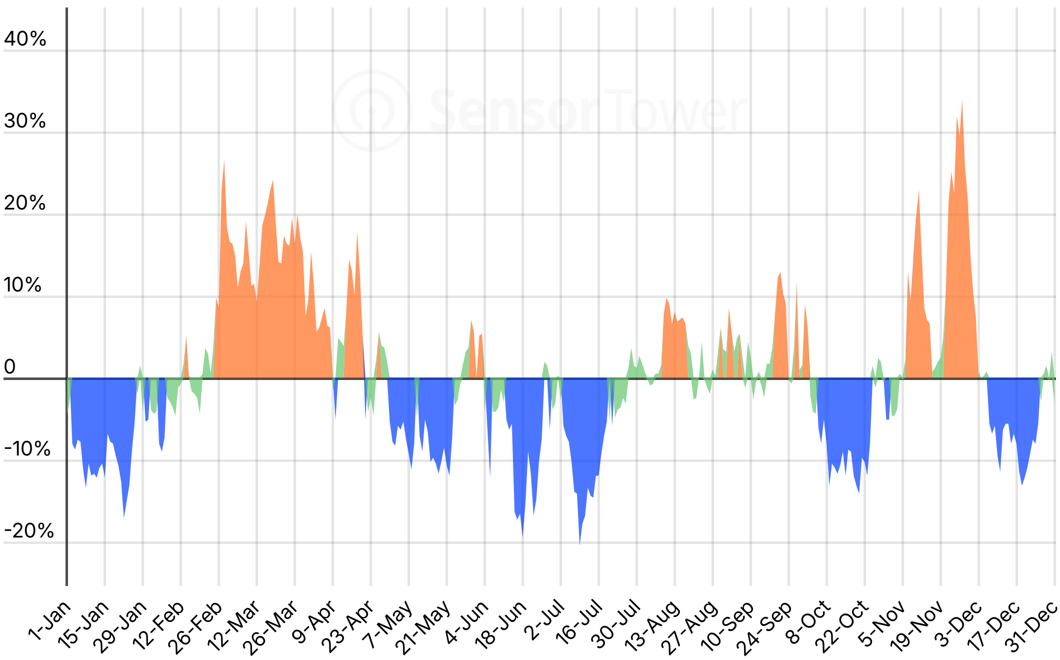
Seasonality and Consumer Cycles

Consumer behavior in the GCC follows distinct seasonal and financial rhythms. Ramadan, Black Friday, and salary cycles drive predictable spikes in engagement. Shopping and Finance apps see the highest variation in these cycles across markets. Understanding these patterns allows marketers to time campaigns and budgets more effectively.

Shopping Peaks During Ramadan and Black Friday

INDEXED SHOPPING APP DOWNLOADS BY DAY OF THE YEAR IOS AND GOOGLE PLAY

Saudi Arabia | United Arab Emirates | Rest of GCC



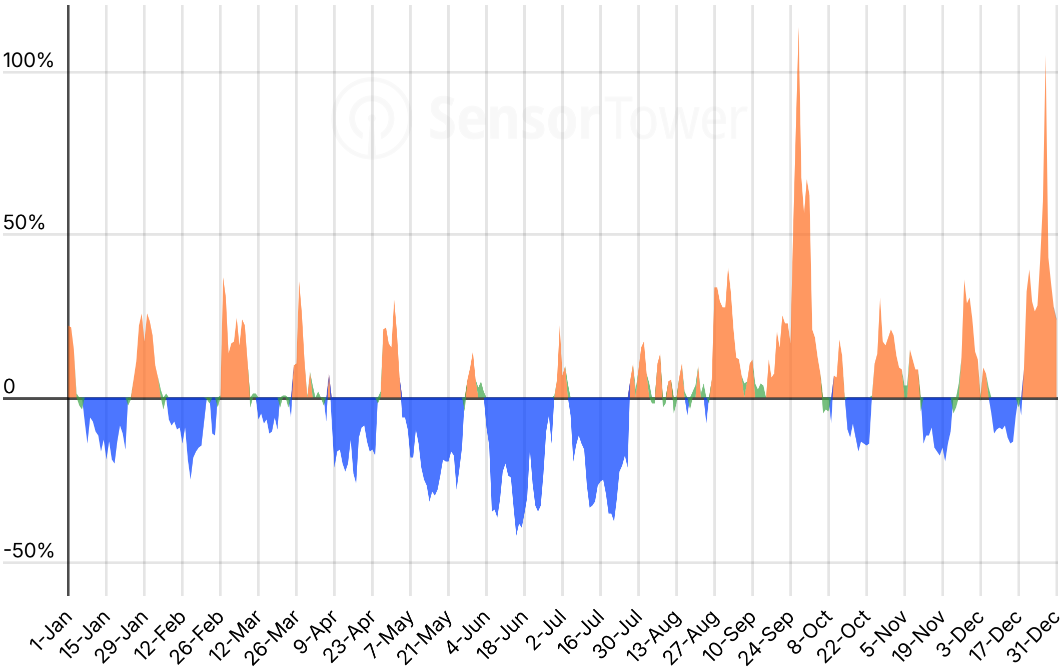
- Late November is peak demand for shopping apps in the GCC, corresponding with deals for Black Friday and Cyber Monday. Downloads spike more than 30% versus the typical day in Saudi Arabia and the UAE.
- In Saudi Arabia, shopping downloads also spike in late February through March during Ramadan.

Note: iOS and Google Play combined. Indexed downloads show percent above / below daily average over the past four years (October 1, 2021 - September 30, 2025), adjusted for the overall trend. Rest of GCC region includes Kuwait, Qatar, Bahrain, and Oman.

Finance Usage Mirrors Monthly Income Cycles

INDEXED FINANCE APP DOWNLOADS BY DAY OF THE YEAR IOS AND GOOGLE PLAY

Saudi Arabia | United Arab Emirates | Rest of GCC



- In Saudi Arabia, Finance app downloads spike at the end of each month and remain high into the beginning of the next month. Downloads also spike ahead of the new year.
- The UAE and rest of GCC see more muted seasonal trends. May tends to be a popular month for Finance apps in the UAE.

Note: iOS and Google Play combined. Indexed downloads show percent above / below daily average over the past four years (October 1, 2021 - September 30, 2025), adjusted for the overall trend. Rest of GCC region includes Kuwait, Qatar, Bahrain, and Oman.

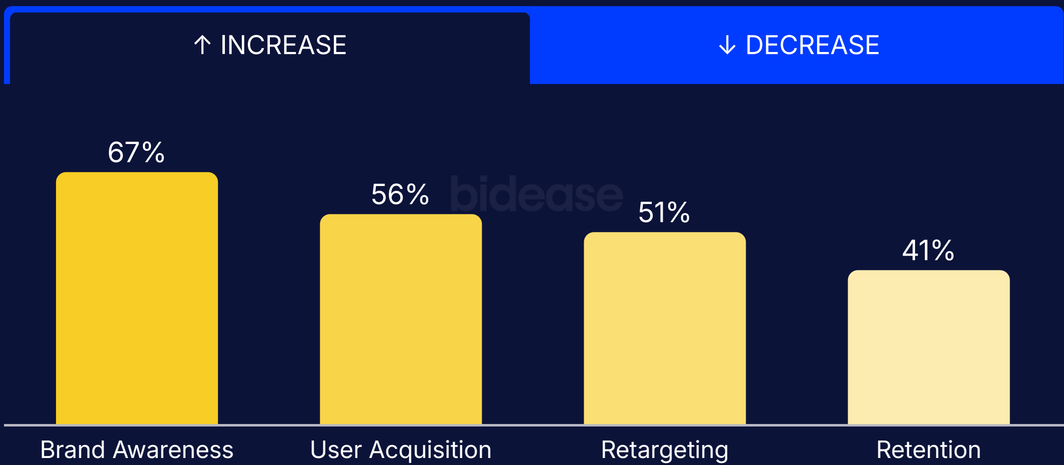
HOW MARKETERS ARE RESPONDING

Budget Allocation & Future Spend

Budgets are tuned to scale UA efficiently. UA and retargeting form the spine, brand strengthens differentiation and paid efficiency, and retention compounds value. Spend follows attention in video environments, but money moves on evidence. The model is simple. Rethink your core channels to drive efficiency by optimizing creative and audience quality with AI, attribution, and internal dashboards.

Budget Mix 2025: UA at the Core, Brand as an Amplifier

WHICH OF THE FOLLOWING ARE YOU INCREASING OR DECREASING BUDGET ON?



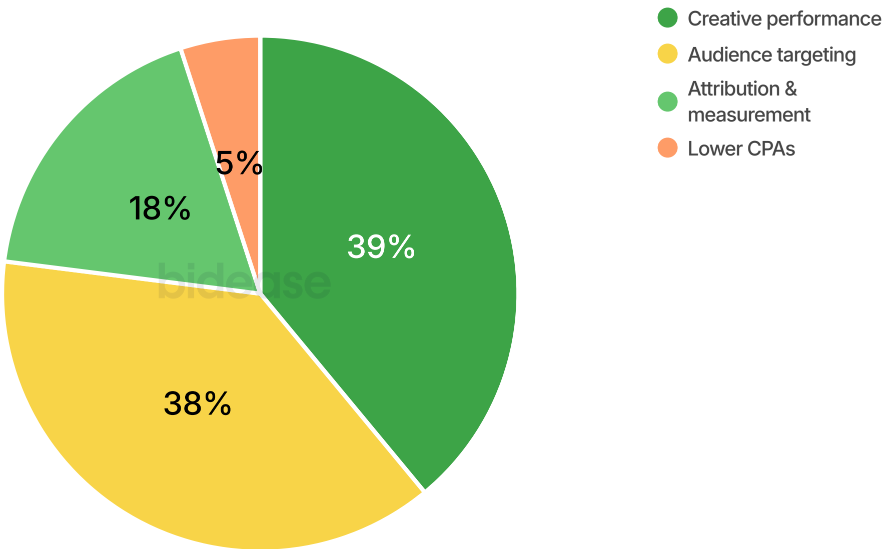
- **UA remains a primary budget line**
  56% will increase UA, and 51% will increase retargeting, keeping UA at the core of budgets.

- **Brand rises to support UA**
  67% will increase brand awareness, while 41% will allocate a higher retention budget to improve paid efficiency over time. Brand is being used to strengthen differentiation and improve paid efficiency.

- **Smart recalibration, not retreat**
  25% will trim UA and 34% will trim retention as part of optimization. These cuts look targeted to ROI rather than a move away from acquisition.

What Unlocks Budget? Inputs & Enablers

WHAT IS YOUR PRIMARY REASON FOR INCREASING INVESTMENT IN A GROWTH CHANNEL?



- **Creative performance moves money**
  39% cite stronger creative as the top reason to add budget. Lower CPAs are cited by only 5%, which shows decisions favor input quality over discounts.

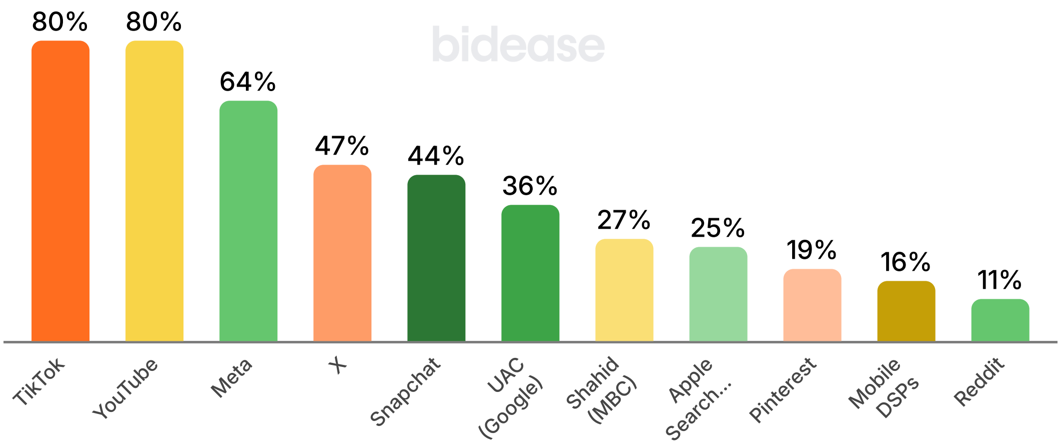
- **Audience targeting is a close second**
  38% point to better audience targeting as a primary reason to increase spend. This indicates budgets follow segments that show clear lift in core conversion metrics.

- **The tools that make bigger budgets possible**
  67% cite AI-powered optimization, 53% rely on internal dashboards, 50% on attribution and analytics, and 44% on creative automation. Together, these tools provide the signal and speed teams need to reallocate with confidence

Reallocation by Platform: Where Spend Moves

WHICH ADVERTISING PLATFORM ARE YOU INVESTING MORE OR LESS IN?

↑ INCREASE ↓ DECREASE



- **Video platforms lead UA investment**
  TikTok and YouTube top the list, with 80% of marketers increasing budgets to capture reach and attention.

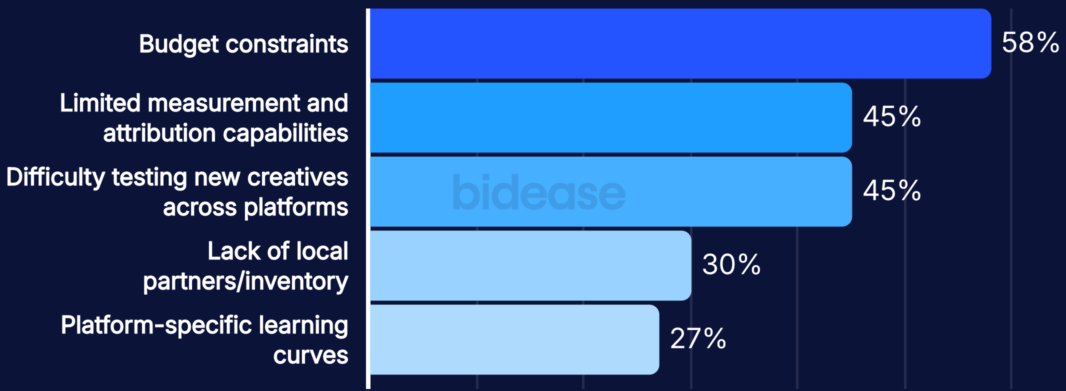
- **Meta a mainstay, while UAC's growth remains selective**
  Meta budgets remain steady at 64%, while UAC spend is more variable at 36%.

- **Cuts reflect tuning, not retreat**
  TikTok (48%) and YouTube (42%) see the deepest cuts, indicating that performance and scalability vary widely by market and execution.

- **Even the majors get optimized**
  Meta at 36% and UAC at 28% also see trims. This indicates that teams are rebalancing across all major platforms to achieve the most efficient mix.

Diversification & What Limits It

WHAT HAVE BEEN YOUR BIGGEST BARRIERS TO DIVERSIFYING YOUR MEDIA MIX BEYOND THE MAJOR PLATFORMS?



- **Budget is the top barrier**
  58% cite budget constraints as the main limit to expanding beyond major platforms. This shows that diversification and scale demand greater efficiency.

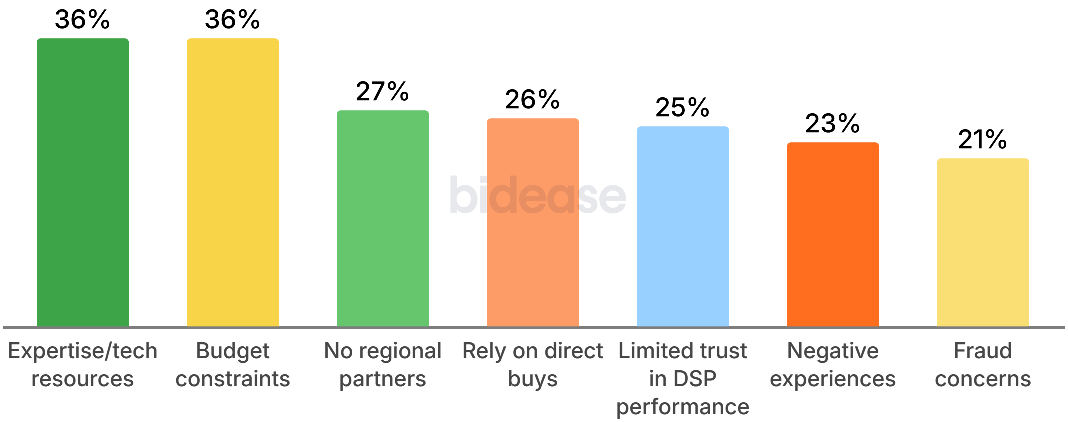
- **Throughput and measurement limit expansion**
  45% report difficulty testing creatives across platforms and 45% report limited measurement or attribution, indicating bottlenecks in asset production and proof, which slows reliable channel adds.

- **Market access and learning curves add friction**
  30% cite lack of local partners or inventory and 27% cite platform learning curves. This points to uneven access and enablement across the region.

- **Focused portfolios are the norm**
  49% run 3 to 5 platforms, 28% run 6 to 10, and only 8% operate on 1 to 2, showing that most teams switch and optimize within a focused set of core channels.

Programmatic DSP Adoption & Barriers to Entry

WHAT IS PREVENTING YOU FROM USING PROGRAMMATIC DSPS?



- **DSPs are mainstream**
  80% use programmatic DSPs today, and only 11% plan to reduce DSP budgets. This signals a resilient path to scale beyond the big social platforms.

- **Know-how and budget constraints are the main hurdles**
  36% cite lack of internal expertise, and 36% cite budget or perceived cost. For teams that overcome these hurdles, programmatic becomes a competitive advantage for scaling reach efficiently.

- **Trust and quality concerns persist**
  25% mention transparency or trust issues and 21% cite fraud or traffic quality. Solving supply transparency and verification turns DSP usage into a durable advantage in 2026.

- **Why this matters for 2026**
  Strong adoption and low planned cuts, combined with known barriers, point to a simple truth: teams that master programmatic operations and supply quality can diversify beyond the majors and protect UA scale.

Path to 2026

Run a weekly budget review with a simple scorecard

For each channel and audience, track three things: improvement versus your baseline, break even time, and whether results stay steady for two weeks. Decide to increase, hold, or cut based on that score.

Use DSPs to diversify beyond big social

Start in one or two priority countries by turning on curated PMP deals in your DSP and require full visibility into publishers, auctions, and performance. Keep only the supply that passes your quality checks and meets your break even target.

"The majority of time spent among Middle East customers is in the open app economy, but 70% of budgets are spent on four or five apps. The opportunity to diversify and reach customers in a variety of different places is a lever that is under-utilized in this market."

–Shayan Rahimi. Managing Director, MENA, Bidease

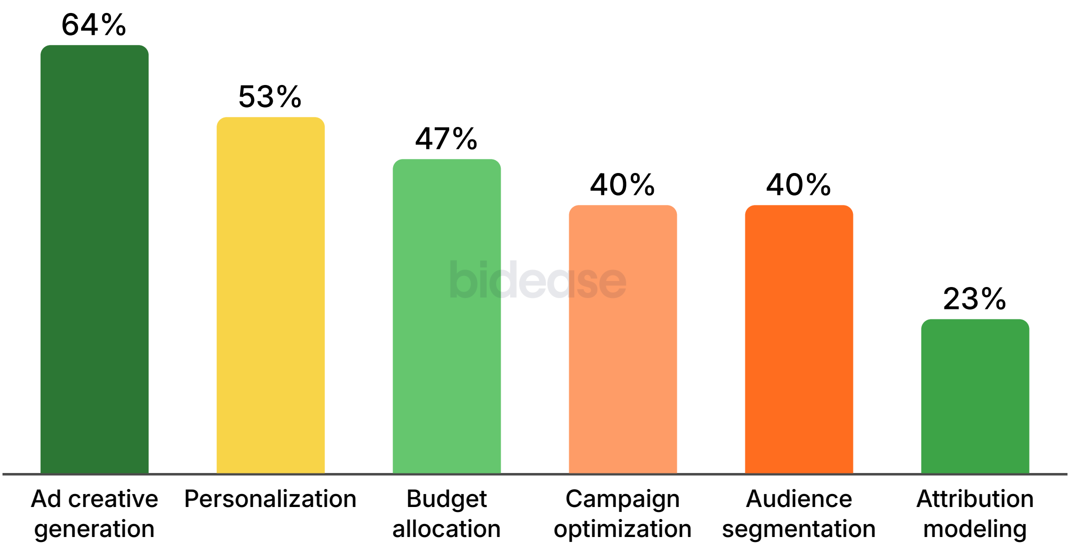
HOW MARKETERS ARE RESPONDING

AI & Creative Velocity

AI is already in production across marketing teams in the Middle East. It powers creative generation and adaptation, helps select audiences, guides budget allocation, and improves day-to-day optimization. A creative refresh is typically conducted weekly or more frequently for most teams, supported by automation and GenAI tools. The result is more tests, faster learning, and budget moves that are based on clearer evidence.

How AI is Used Across the UA Stack

IN WHICH AREAS ARE YOU CURRENTLY USING AI ACROSS YOUR MARKETING STACK?



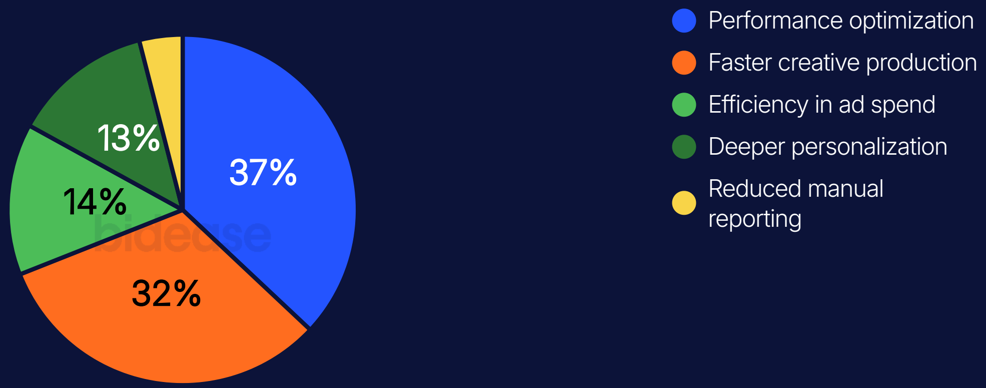
- **AI already powers creative and personalization**
  64% use AI for ad creative generation and 53% for personalization. This shows AI is part of everyday production and message tailoring.

- **Optimization and budgeting use AI**
  40% use AI for campaign optimization and 47% for budget allocation, indicating teams use tools and models to guide spend and day-to-day adjustments.

- **Attribution adoption is earlier**
  Only 23% use AI or modeling for attribution. Marketers are still proving out methods before making them standard practice.

Where AI Will Add the Most Value in the Next Year

WHERE DO YOU EXPECT AI TO DELIVER THE MOST VALUE TO YOU AS A MOBILE APP MARKETER OVER THE NEXT 12 MONTHS?



- **Performance optimization is the top expected gain**
  37% say AI's biggest value will be better optimization. The focus is on improving the quality and stability of day-to-day decisions.

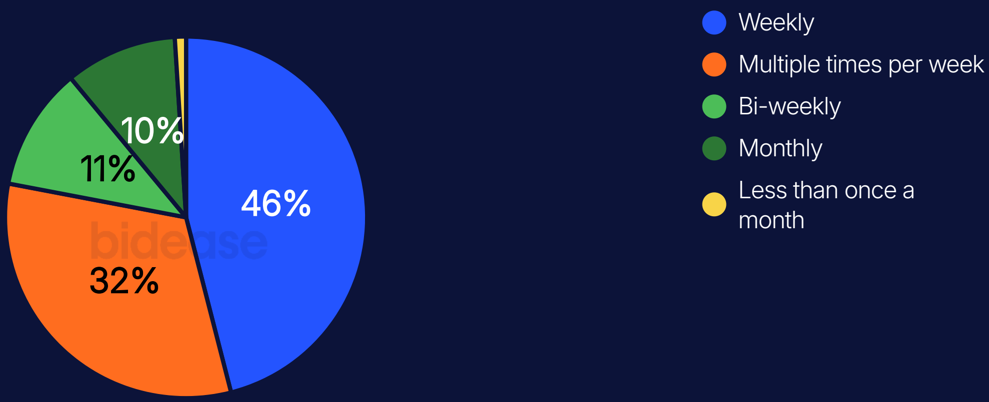
- **Speed is next**
  32% expect faster creative production to drive impact, indicating output volume and turnaround time are seen as major levers.

- **Spend efficiency and personalization trail the leaders**
  14% cite spend efficiency, and 13% cite deeper personalization.

- **Creative automation delivered impact**
  47% say creative automation or AI-assisted design tools made the biggest difference in growth. This shows that production speed and iteration quality are already proven drivers, not just pilot ideas.

Creative Testing Velocity

HOW OFTEN DO YOU REFRESH YOUR MOBILE AD CREATIVES?



- **Most refresh weekly or faster**
  6% refresh weekly and 32% refresh multiple times per week, reflecting a shift toward continuous testing cycles.

- **Slow cycles are rare**
  Only 10% refresh monthly, and 1% refresh less than monthly.

- **Automation and GenAI are standard**
  60% use creative automation and 48% use generative AI tools for production and testing. This shows these tools are part of everyday workflows rather than pilots.

Path to 2026

Explore available AI tools for your campaigns

Explore generative AI tools that can spin up multiple images, icons, and insights for your ad creatives. This will reduce cycles and allow you to test more concepts, more quickly. Find partners who use AI, like neural networks, to tease out nuances among users that improve targeting and overall campaign performance.

Regularly test and scale

Refresh creatives every one to two weeks by country with regional partners to keep content fresh while allowing ML algorithms to learn and optimize. Avoid over-refreshing, which can disrupt learning. Rotate new formats biweekly to access fresh inventory, and set clear performance thresholds (CTR, CVR, CPI) so spend scales only where results hold.

"Does creative matter? Absolutely. But how often you need to update it really depends on the vertical, on seasonality, on the promos you are running. One important shift we are seeing is teams becoming more data driven about how they approach the creatives... if you keep an eye on the KPIs and CTR replacement, for example, you will always know when creative is not performing anymore, and it's time to test something new."

–Olya Ulianova. Product Manager DSP, Bidease

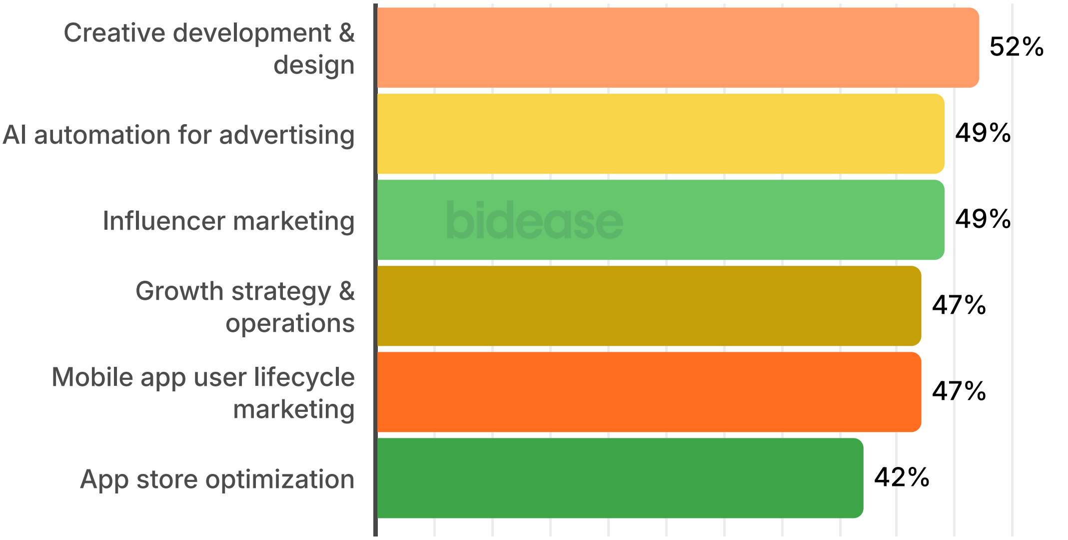
HOW MARKETERS ARE RESPONDING

Team Size, Hiring, & Resources

Teams in the Middle East are built for throughput. The leading pattern is a hybrid structure with an in-house core supported by agencies, backed by creative and AI talent, and a simple enablement stack of data, attribution, and automation. The goal is faster output and better decisions while keeping UA at the center.

Team Structure & Hiring Priorities

WHAT SKILL SETS ARE YOU PLANNING TO HIRE FOR OR DEVELOP INTERNALLY IN 2025?



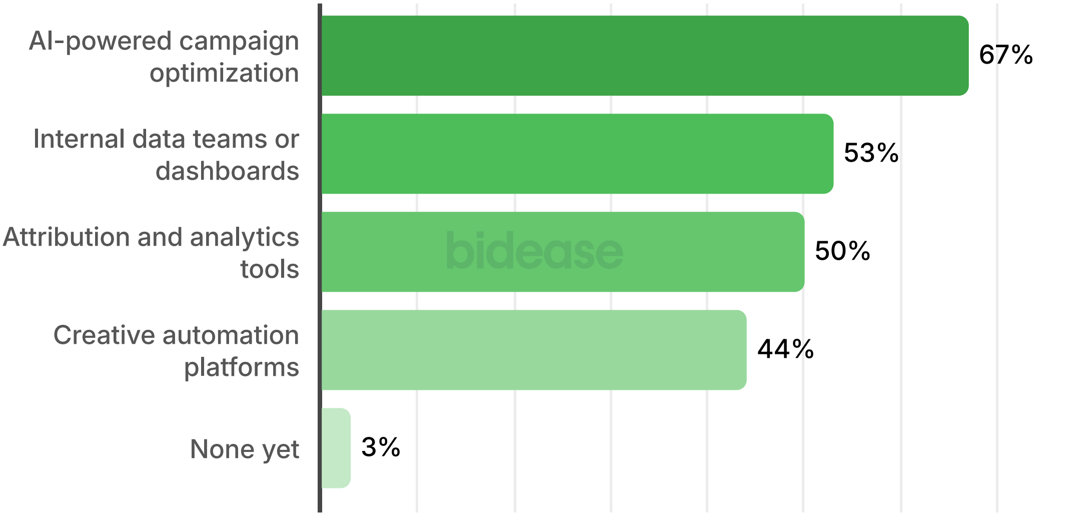
- **Hybrid leads**
  39% run in-house with agency support. This suggests teams want control of strategy with flexible execution capacity.

- **Strong in-house core**
  33% are fully in-house, and only 7% are fully outsourced, indicating that execution is anchored within the company for speed and consistency.

- **Creative and AI are table stakes**
  52% plan to hire for creative development and design, and 49% for AI automation. This shows teams are prioritizing frequent shipping and the tools that accelerate it.

Enablement & Creative Resourcing

WHICH TOOLS OR TECHNOLOGIES ARE HELPING YOU DIVERSIFY YOUR MEDIA MIX?



- **AI optimization is the top enabler**
  67% cite AI-powered optimization as key. This shows teams depend on model-driven suggestions to guide daily decisions.

- **Data and attribution guide spend**
  53% lean on internal dashboards and 50% on attribution and analytics, indicating that a shared view of performance is central to budget reviews.

- **Creative resourcing is mixed**
  47% rely on an in-house creative team, and 46% use agencies or freelancers. This blended approach allows teams to maintain velocity across countries.

Path to 2026

Strengthen your ecosystem of partners

Choose agencies and partners that align with your goals—whether brand, UA, or retention—and can integrate seamlessly with your in-house team. Build tight collaboration between your MMP, internal dashboards, and external partners to ensure data consistency and shared accountability.

Test AI solutions to shore up staffing needs

With nearly half of marketers relying on freelancers for design, generative AI tools can bridge talent gaps and lower costs. Use AI to accelerate creative production, support freelancers with direction and variations, and maintain consistency across partners and campaigns.

"AI is the most powerful force reshaping marketing teams today. It changes how we hire, how we produce, and how we scale. The next wave of leaders will be the ones who treat AI not as a tool, but as a teammate — integrated into every creative and operational decision."

–Dennis Mink. CMO, Bidease

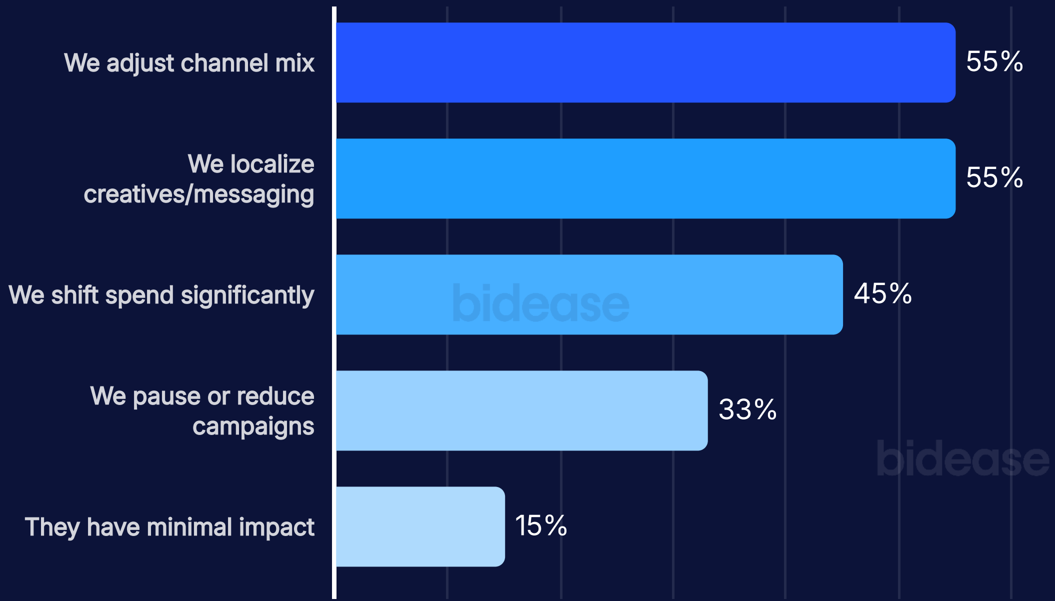
HOW MARKETERS ARE RESPONDING

Regional Trends & Market Shifts

Seasonality is moving, saturation is real in KSA and UAE, and privacy and platform rules continue to evolve. Teams that keep UA at the center are responding with faster testing, mix agility, and clearer measurement so they can move budget with confidence. At the same time, more brands are increasing investment in the region, which raises expectations for disciplined execution.

Seasonality Is Shifting; Mix & Messaging Adjust

HOW DO SEASONAL MOMENTS IMPACT YOUR GROWTH STRATEGY?

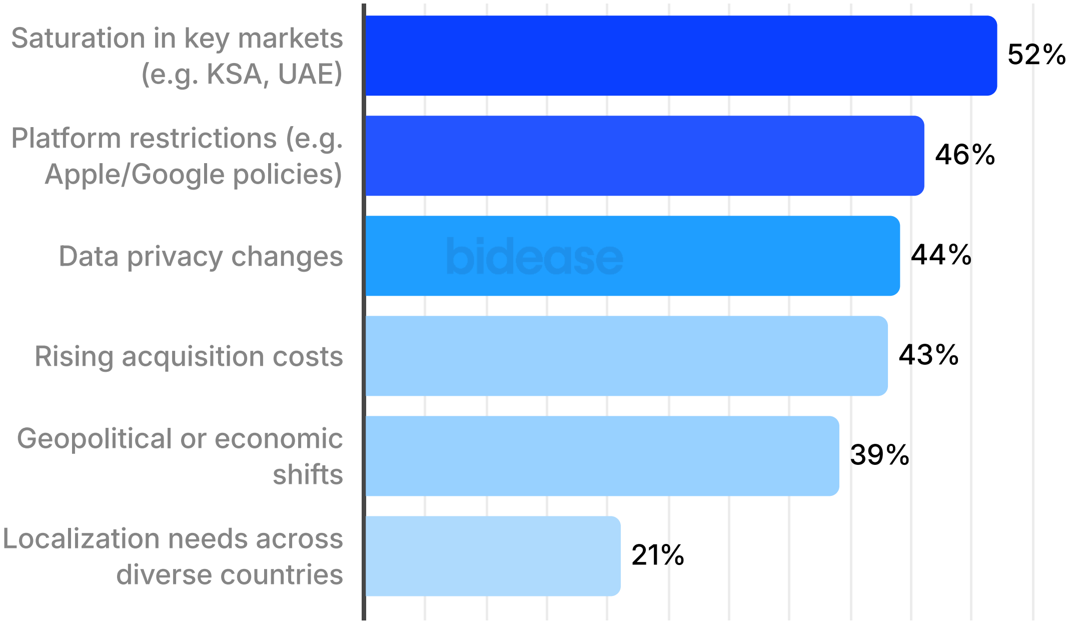


- **New windows are emerging**
  61% say new seasonal windows are appearing, and 29% say behavior is less predictable. This shows calendars are widening and teams anticipate more volatility throughout the year.

- **Teams adjust mix and creative before big spend moves**
  55% adjust channel mix and refresh creatives, while blunt spend shifts rank lower at 45%. This indicates that marketers are using execution levers first, then adjusting the budget when results hold.

Region-Specific Challenges to Growth

WHAT ARE THE BIGGEST REGION-SPECIFIC CHALLENGES TO MOBILE GROWTH IN MENA TODAY?

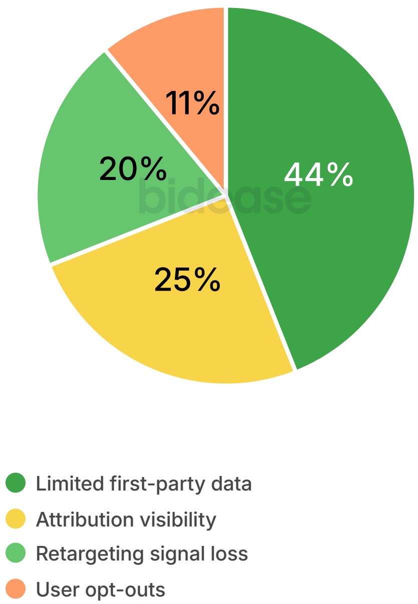


- **Saturation tops the list**
  52% cite saturation in KSA and UAE as the number one challenge. This raises the bar for differentiation and efficient reach.

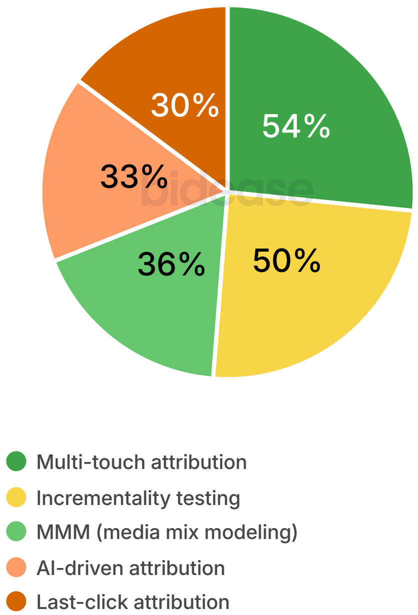
- **Rules and costs add pressure**
  46% point to platform restrictions, 44% to privacy changes, and 43% to rising acquisition costs. This shows that compliant execution and cost control are constant requirements.

Privacy & Measurement Shape Execution

WHAT PRIVACY-RELATED CHALLENGE HAS BEEN THE HARDEST TO NAVIGATE?



HOW DO YOU CURRENTLY MEASURE ROI ACROSS CHANNELS



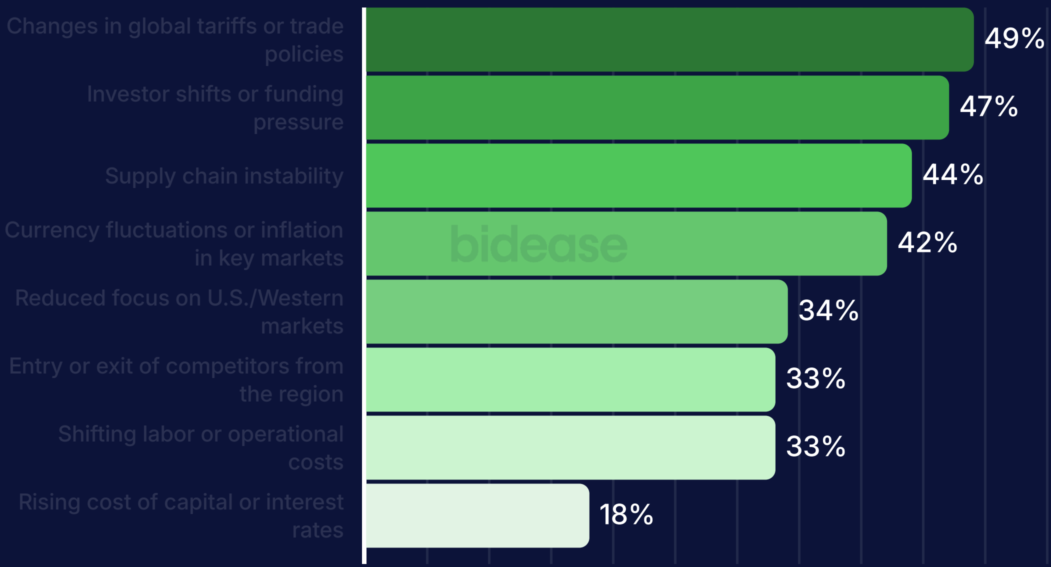
- **The hardest privacy hurdle is data**
  44% cite limited first-party data, ahead of attribution visibility at 25% and retargeting signal loss at 20%. This suggests audience rebuilding is the primary challenge.

- **Disruptive changes to privacy**
  50% cite Consent Mode and GA4, 47% cite Android privacy, 43% cite SKAN limits, and 39% cite local regulations. Teams are managing several shifts at once.

- **Measurement is relatively advanced**
  54% use multi-touch attribution and 50% use incrementality, compared with 30% who use last-click attribution, showing that marketers are relying on more robust methods to guide their mix and validate changes.

Macro Shifts & 2025 Trend Radar

WHICH OF THE FOLLOWING GLOBAL OR MACROECONOMIC CHANGES ARE INFLUENCING YOUR MENA GROWTH STRATEGY?



- **More brands are leaning into the region**
  60% say global changes mean they are investing more in the region, positioning the Middle East as a priority growth market going into 2026.
- **Why the shift?**
  49% cite tariffs and trade, 47% investor pressure, and 44% supply chain instability, proving that external factors are shaping budget decisions.
- **User sophistication is a tailwind**
  48% say high mobile savviness will most influence strategy, while 42% point to saturation in KSA and UAE as a defining factor. This combination pushes higher standards for product and creative while keeping pressure on efficient reach.

Path to 2026

Plan dynamically for peaks and shifts

Build a rolling seasonal plan with flexible budgets that scale up or down as performance changes. Use early indicators like CTR, CVR, and CPI to adjust weekly, then review cohort data (CPA, ROAS) for deeper validation. Set simple triggers to scale, hold, or cut, and keep a reserve to react quickly to market shifts or unexpected surges.

Diversify across markets and partners

Expand beyond KSA and UAE by testing small budgets in new markets to find high-quality, cost-efficient users. Partner with agile, transparent DSPs that can operate effectively across the region, and localize creatives not just by language but by cultural and contextual signals to maximize resonance.

Conclusion

User acquisition remains the engine of growth in the Middle East. Brand and retention support it by improving differentiation and lifetime value. Teams are shifting money based on input quality. Creative that proves lift and audiences that convert get more budget. Video attracts the most attention, but repeatable performance depends on execution and measurement, not channel headlines.

AI is already in production, and it is speeding up the work. Teams are using it for creative, audience selection, budget allocation, and daily optimization. Hybrid orgs and a clear enablement stack help ship work every week with confidence. Seasonality is shifting, saturation is a reality in KSA and UAE, and privacy rules are evolving. The marketers who win have one measurement playbook, move budget on evidence, and keep testing ready for the next change.

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Bidease is a programmatic demand-side platform powered by advanced AI and machine learning technology. We specialize in helping app marketers achieve their user acquisition and in-app retargeting goals through data-driven, fully managed advertising solutions. By combining best-in-class machine learning and neural networks, with a commitment to transparency and performance, we deliver measurable results that drive business growth.

Our platform empowers marketers in high-growth markets to scale campaigns with precision, maximize ROI, and tap into new opportunities. With Bidease, customers experience ease, efficiency, and expert support at every stage of their advertising journey.

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Sensor Tower

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Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile ecosystem with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform includes Website, Gaming, Audience, Retail Media, and Pathmatics Digital Advertising Insights, unlocking access to the most comprehensive competitive intelligence in the digital economy.

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