

ADVANCED TV REPORT, SAUDI ARABIA

Tune in to **winning**

TV insights



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Ready to activate your winning mode?

As viewership evolves and consumption habits change across generations, video isn't just on TV. Video is across CTV, YouTube, TikTok, reels, and even audio streaming services. And it's also become influential in inspiring transactions - and driving them. So for marketers, the big question isn't whether to adopt Advanced TV strategies, it's 'how?'

MiQ partnered with Censuswide to survey **300** consumers and **100** advertisers across Saudi brands and agencies. Bringing valuable insights together, we look at viewer habits and advertiser attitudes. Plus, you'll discover the winning strategies to supercharge your streaming performance, overcome fragmentation and achieve incremental reach and ROI. It's time to win the latest season of TV.

ABOUT THE DATA

MiQ has access to over **765 billion** annual impressions/commercials and more than **140k** distinct TV viewership signals per household, resulting in **6.4 trillion** TV content consumption signals. Additionally, MiQ has access to over **102 billion** annual consumer purchase signals and consumer survey insights from GWI, representing over **3 billion** internet users across **54 markets**.

MiQ Sigma is AI-powered advertising technology that connects all MiQ data to deliver unique insights.



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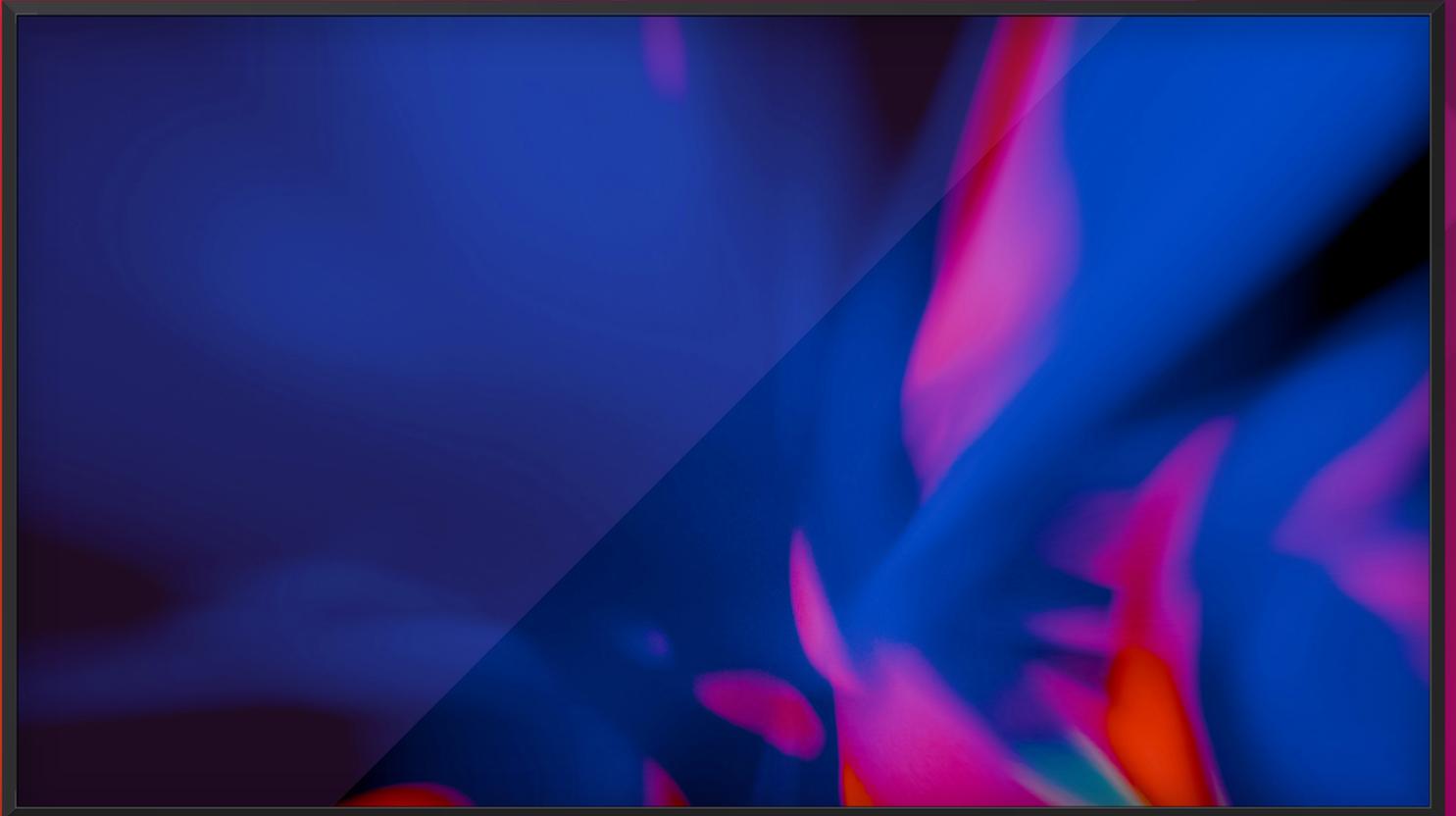
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Switching on

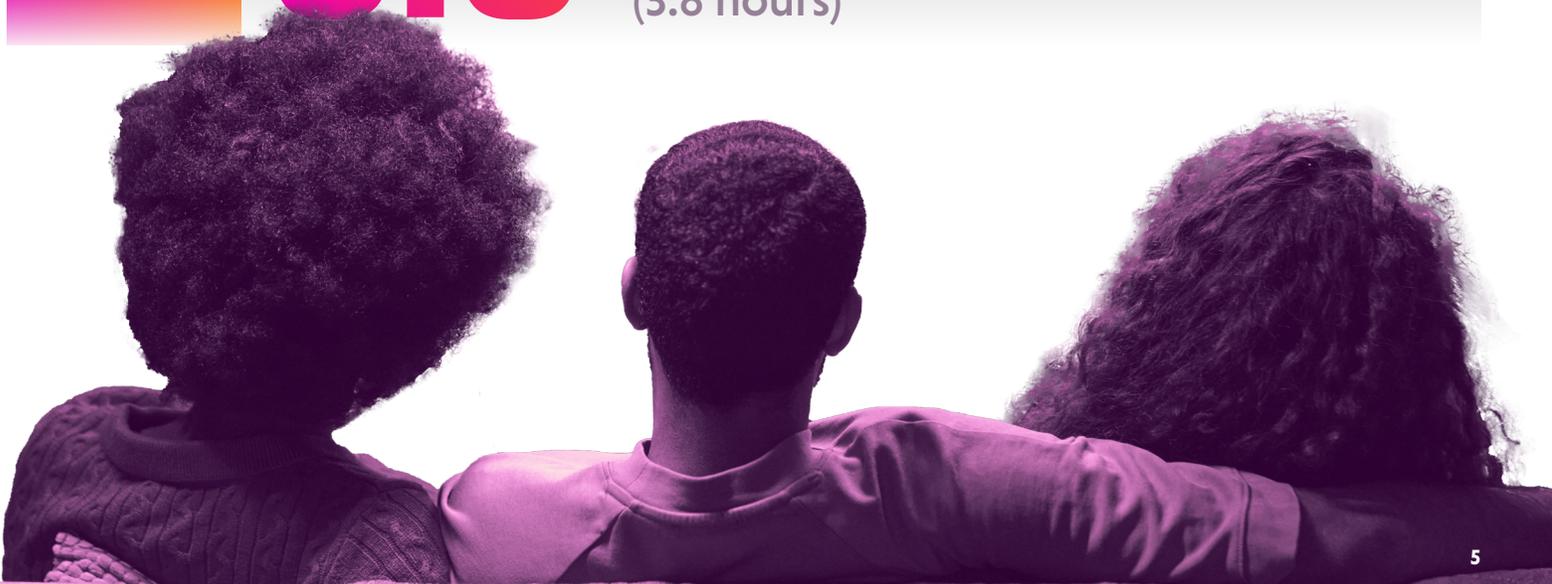
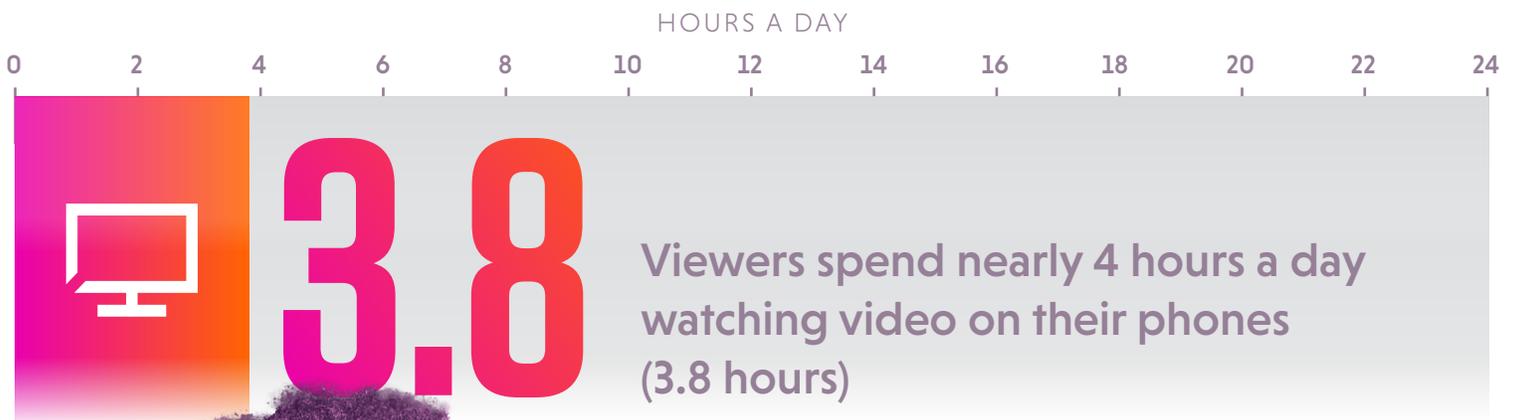
Before we dive into more detail, let's look at the wider TV picture.



Before we dive into more detail, let's take a look at the big picture. Or in this case, the small picture. Mobile is the most-watched device for video in Saudi Arabia, with 87% of people using it to stream content, followed by 69% who still watch on TV. Viewers spend nearly 4 hours a day watching video on their phones (3.8 hours), just more than on TV (3.3 hours).

Across Saudi Arabia, streaming is now part of everyday life for **84%** of audiences. Time spent watching OTT platforms (3.1 hours per day) has overtaken linear TV (3.0 hours per day). The average viewer spends around 70 SAR each month on streaming services, and **43%** expect this spending to rise over the next year.

Most Saudi viewers subscribe to multiple platforms, with **44%** using 1 or 2 services, and **45%** subscribed to 3 or 4. Only **16%** remain fully linear viewers, while **32%** are self-proclaimed cord trimmers, and **40%** have cut the cord altogether.



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Tuning in to viewers

Find out consumer behaviors, habits and preferences



Find out where the most valuable eyeballs are, how to meet them, and how to supercharge your success.

Viewers value pricing and content

In Saudi Arabia, price and content variety drive platform choice. Pricing and discounts are the top reasons for subscribing to a streaming service for **over half of people** (54%), followed by content variety (45%), exclusive content (40%), recommendations and reviews (37%), and event-based content (32%).

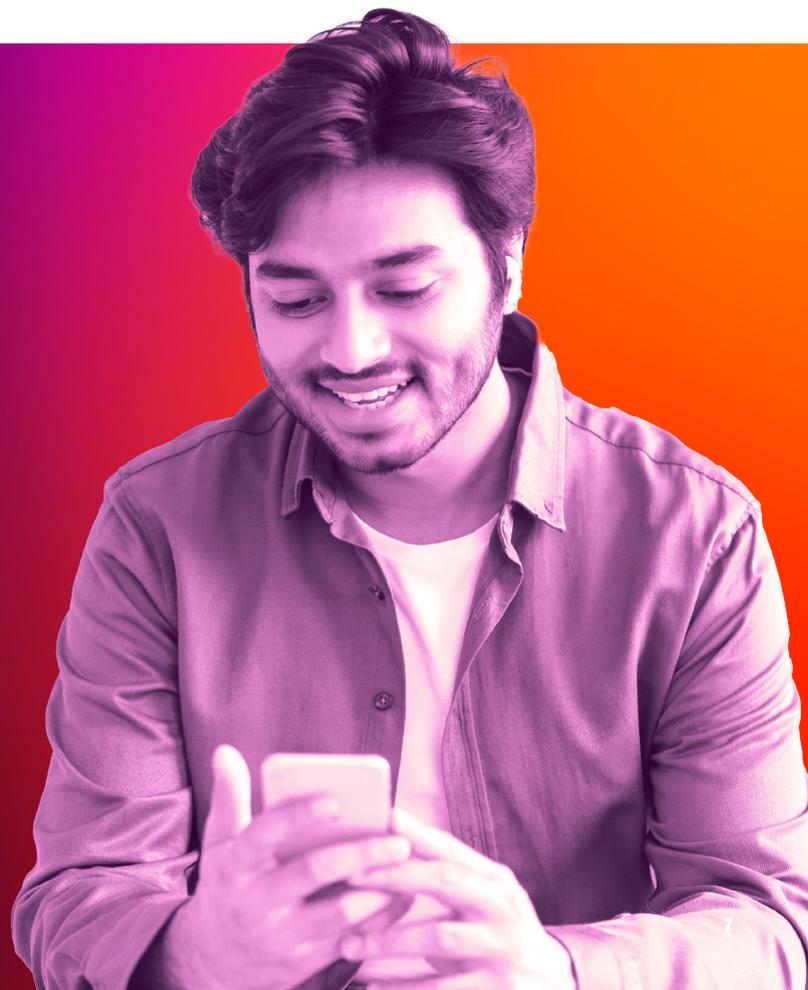
Second screening is becoming second nature

Multitasking while watching video is now the norm. **26%** of viewers almost always second-screen, and **36%** do so often. Most second-screening happens on mobile devices, with activities ranging between browsing social platforms (49%), watching other video content (37%), playing games (34%), looking up information related to what they are watching (32%), and researching or shopping for products (31%).

Ad-supported video is tolerated

Most viewers prefer premium ad-free experiences, with **42%** saying they always choose ad-free and **25%** choosing it most of the time. However, many are open to ad-supported models if the ads are relevant. Saudis will tolerate around 5 ads per hour on OTT, compared to 6.1 on linear. **38%** would rather see no ads at all, but **32%** are willing to watch 5-10 ads per hour in exchange for a subscription discount.

Personalized or interest-based ads (35%), limited-time offers (35%), and interactive ad formats (32%) are among the most engaging for Saudi viewers. Over half (55%) say seeing repeated ads from the same advertiser can positively influence their opinion.



Viewers respond to video ads when they're relevant

Engagement with ads is high. Nearly **four in five viewers** (79%) say they interact with ads while watching video content. **34%** add items to a wishlist, **31%** take immediate action on a second screen, and **28%** make note of the brand name for later. Importantly, **60%** agree that ads have the power to influence them to switch brands, and 61% say they're more likely to buy from a brand on social media if they've seen its ad on CTV or YouTube first.

Personalization makes the difference

Ad fatigue is real, but so is relevance. **35%** of viewers are more likely to engage with personalized ads or those that offer limited-time deals. Interactive formats - including polls, quizzes, and gamified choices - engage **32%**, while **30%** respond best to native-style advertising like product placement or sponsored segments. And with **55%** saying repeated exposure to the same advertiser can positively shift their opinion, frequency still has a role to play - if the creative is good enough.



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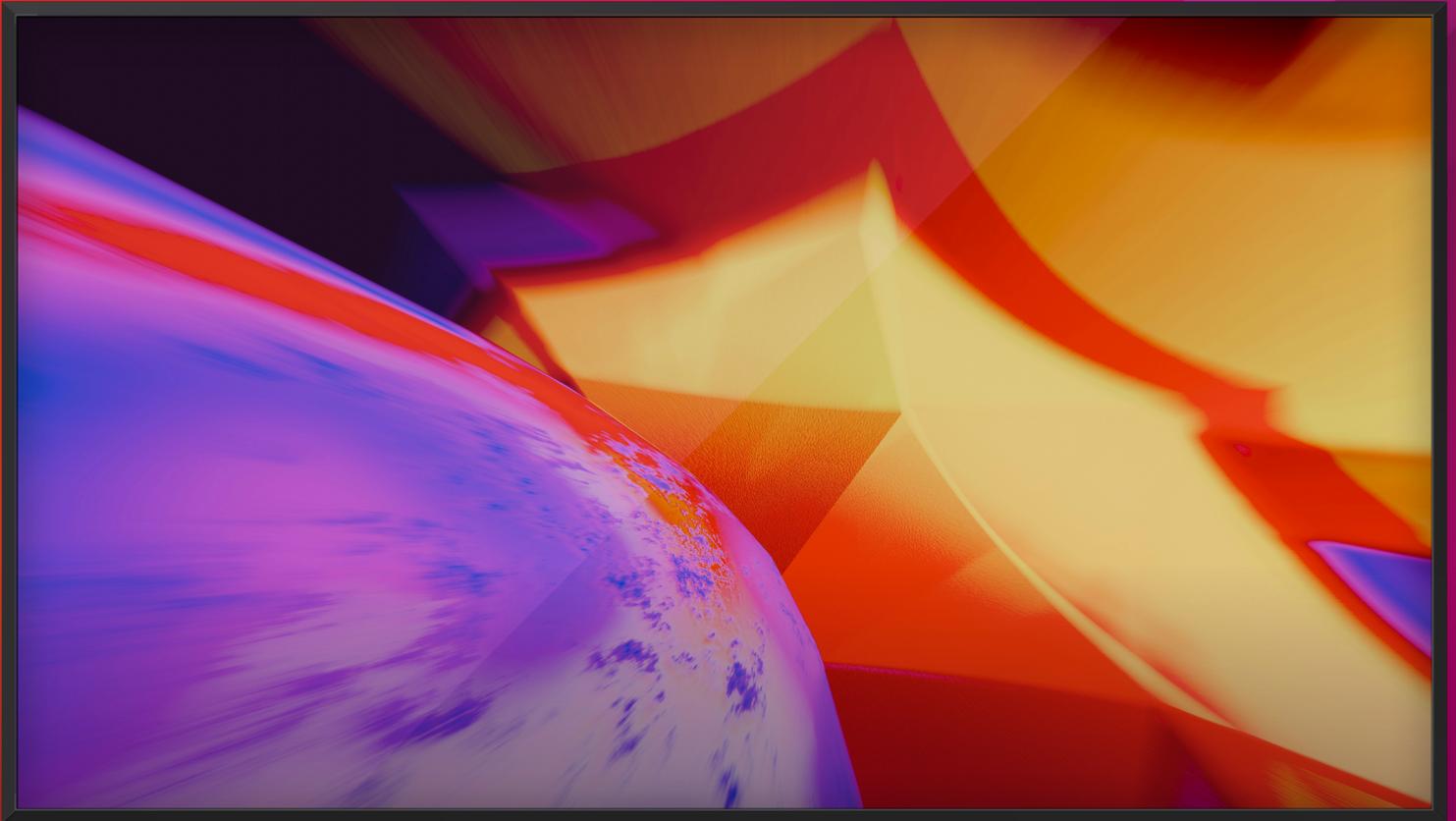
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Tuning in to advertisers

Are advertisers and viewers on the same wavelength?



We surveyed advertiser priorities, and how that's impacting everything from spend, to channel selection.

Budgets are rising, especially for YouTube and social

The Saudi ad market is feeling optimistic. **83%** of advertisers expect their overall marketing budgets to increase in the next year. YouTube (53%) and social platforms (64%) are the top priorities for future investment, while CTV is still emerging with **26%** planning to advertise there. Still, **49%** say their CTV budgets will grow, showing that a longer-term shift is underway.

Shoppable is the standard, not the exception

Advertisers in Saudi Arabia are embracing commerce-driven formats. **91%** say they already use shoppable ads, with **92%** planning to continue across CTV and YouTube. The top creative formats include in-video product tags (36%), shoppable video ads (30%), and interactive ads (29%), aligning with the strong shopping habits of second-screening audiences.

Retail media is reshaping planning

Retail Media Networks (RMNs) are now a core part of the Saudi planning playbook, with **94%** of advertisers actively using them. Nearly as many (93%) plan to leverage commerce data for their CTV campaigns. This shift signals a growing demand for measurable outcomes that connect reach and sales in one ecosystem.

Creative is still the biggest lever for performance

Standout creative is still the strongest driver of advertising performance, with **44%** of advertisers ranking it as most important. Actionable creative (30%) and third-party audience/contextual data (28%) are also key performance drivers. However, creative approvals (43%), production (39%), and creative enhancements (36%) continue to pose challenges for campaign agility.

Complexity calls for smarter solutions

Saudi advertisers face familiar hurdles when executing on CTV and YouTube: creative services (27%), privacy and transparency (27%), measurement (24%), and incremental reach (22%) all test marketers' capabilities. **63%** of marketers rely on self-service platforms for data ownership and transparency, while **26%** use managed services to tap into specialist skills, unlock efficiencies, and scale more effectively.

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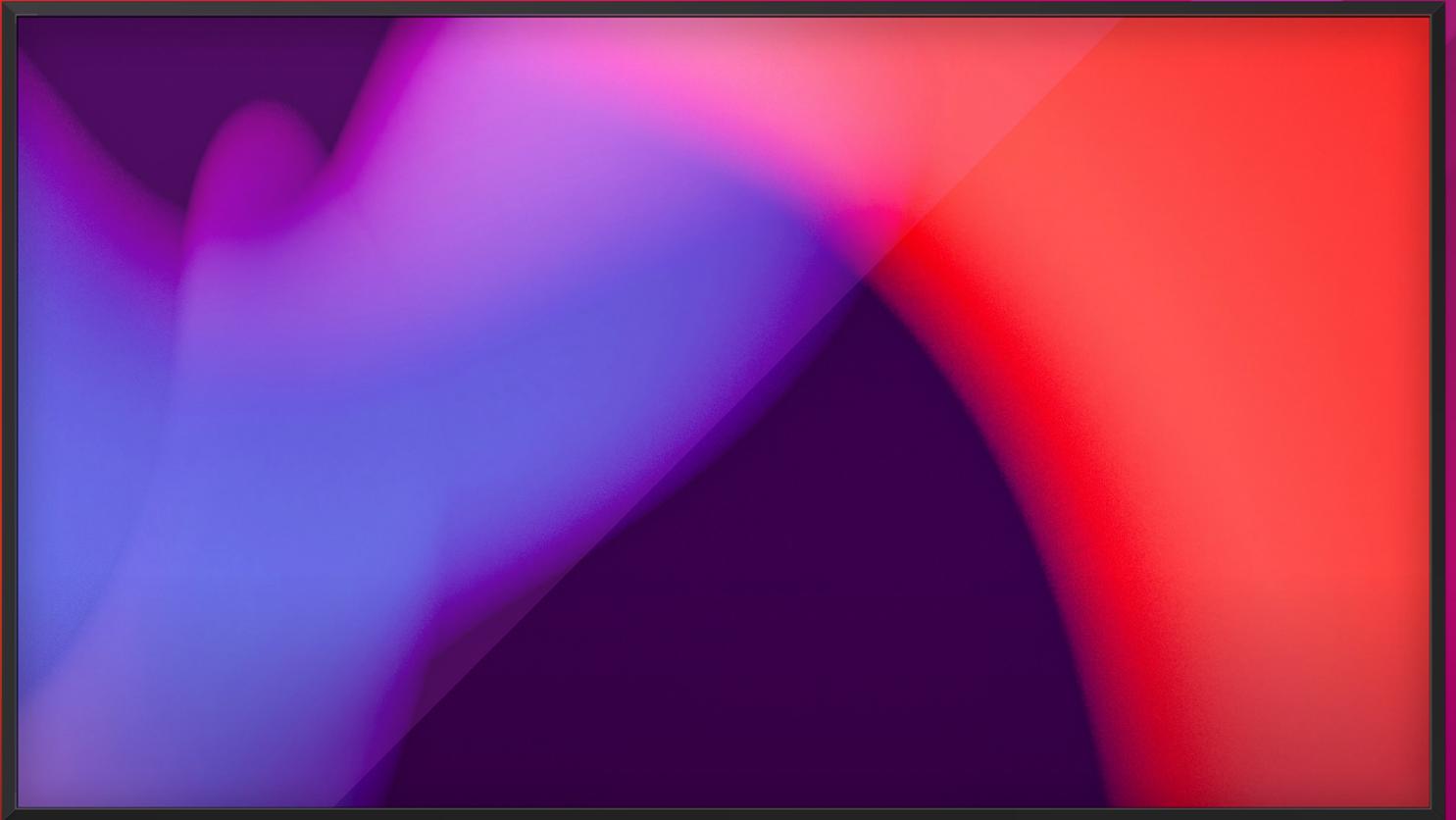
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3 ways to win at Advanced TV

Discover how to get on top of the trends, and ahead of the game



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Unlock success with agnostic access

YouTube is no longer just another media channel, it's becoming the backbone of video strategy in Saudi Arabia. With 53% of advertisers planning to invest in YouTube over the next 12 months, and 59% expecting to increase budgets on the platform, its role as a central hub for mobile and multi-screen audiences is clear.

YouTube's reach across mobile and TV positions it perfectly to bridge upper-funnel brand building and lower-funnel commerce. For marketers looking to unify fragmented attention across devices, starting with YouTube is essential.



2

Match creative formats to audience behavior

Saudi viewers are consistent multitaskers. So creative strategies can no longer treat audiences as passive viewers. Shoppable video, interactive overlays, and in-video product tags directly align with what 31% of viewers already do: take instant action on a second screen.

In a market where attention is high and second-screen habits are deeply ingrained, designing for interactivity is the new creative baseline.



3

Bag bigger commerce success

Retail media and commerce signals aren't just performance add-ons anymore - they're at the heart of Advanced TV strategies. By combining retail data with media insights, brands can trace audience journeys from impression to purchase, measuring incremental sales rather than just awareness.

In this new world, video is about accountability as much as visibility, and those who connect screens, store shelves, and shopping carts will come out on top.