



2024 EGYPTIAN OOH MARKET REPORT

Unpacking 53% Growth & Key Trends

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Market Key Performance Indicators

50.3k

Monitored
AdSpace

40.9k

Utilized AdSpace

84%

Utilization Rate

6.3b

Expenditure

53%

Expenditure
YoY

10%

Utilization YoY

1,718

Brands

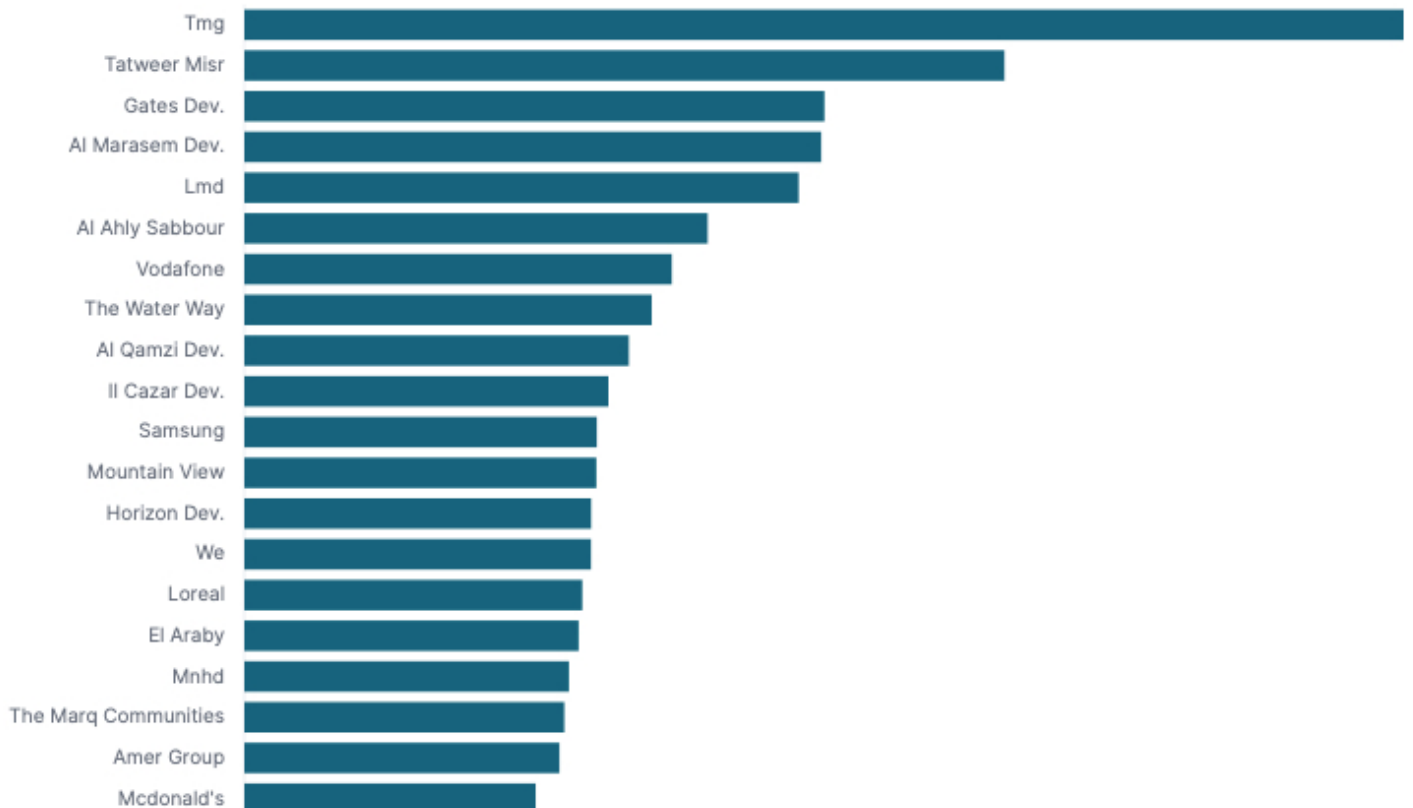
25%

Brands YoY

16%

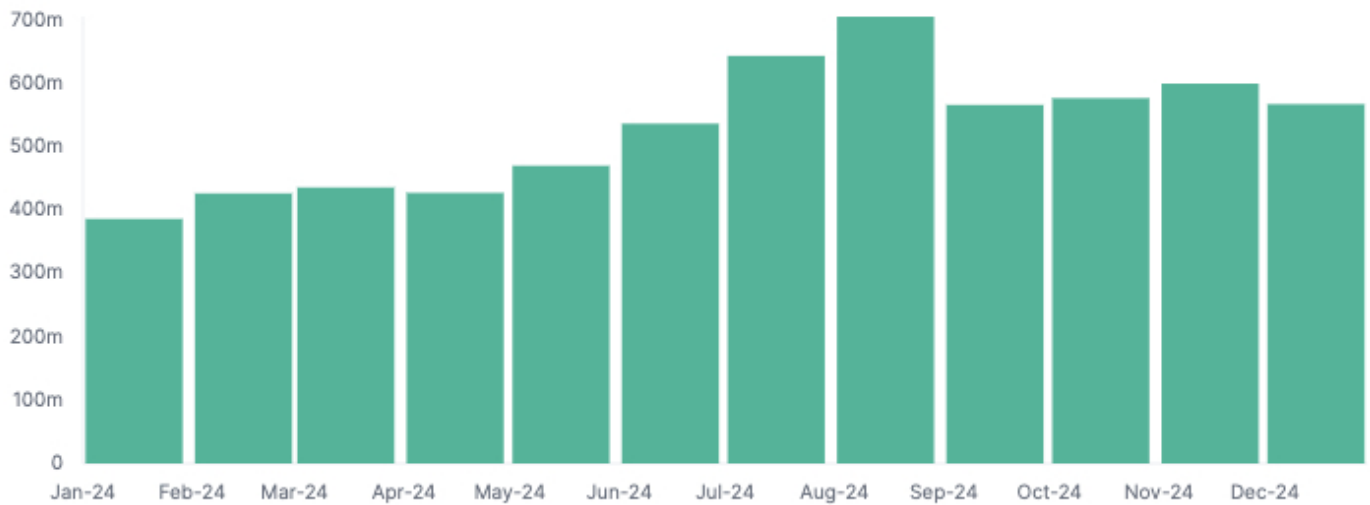
Inventory YoY

2024 Top 20 Advertisers

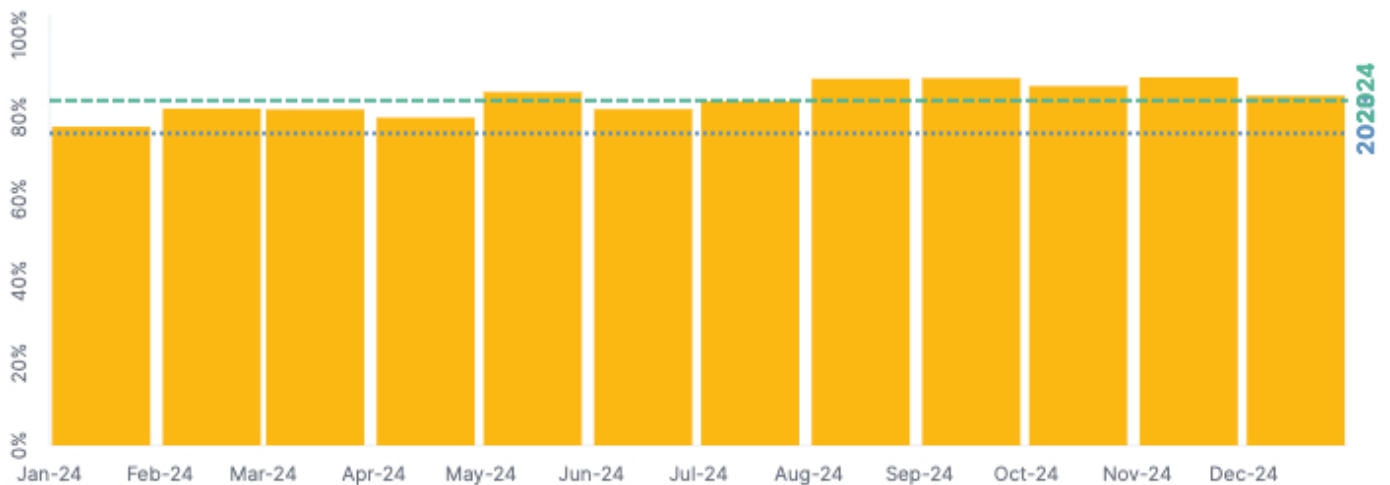


Monthly OOH Trends

Monthly Expenditure



Monthly Utilization Rate



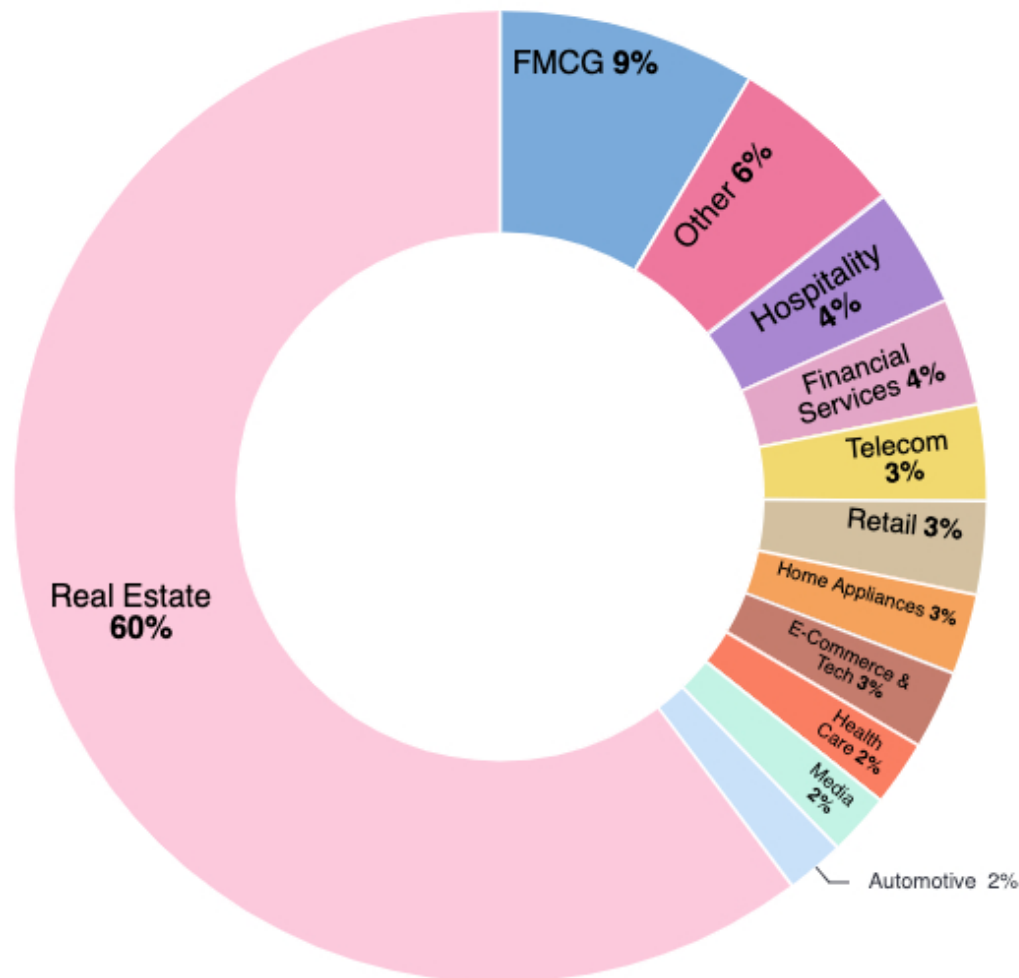
Market Growth:

- **Market billings** surged from **EGP 4.2B** to **EGP 6.3B**, demonstrating strong overall market growth.
- **Market utilization** increased significantly from **76%** to **84%**, indicating high demand for OOH advertising space.
- The **number of brands** expanded from 1397 to 1718, reflecting growing adoption of OOH across various sectors. Notably, **432 brands** (nearly 25% of all advertisers in 2024) were new entrants to the OOH market, indicating a significant influx of new players.

INDUSTRIES & SECTORS



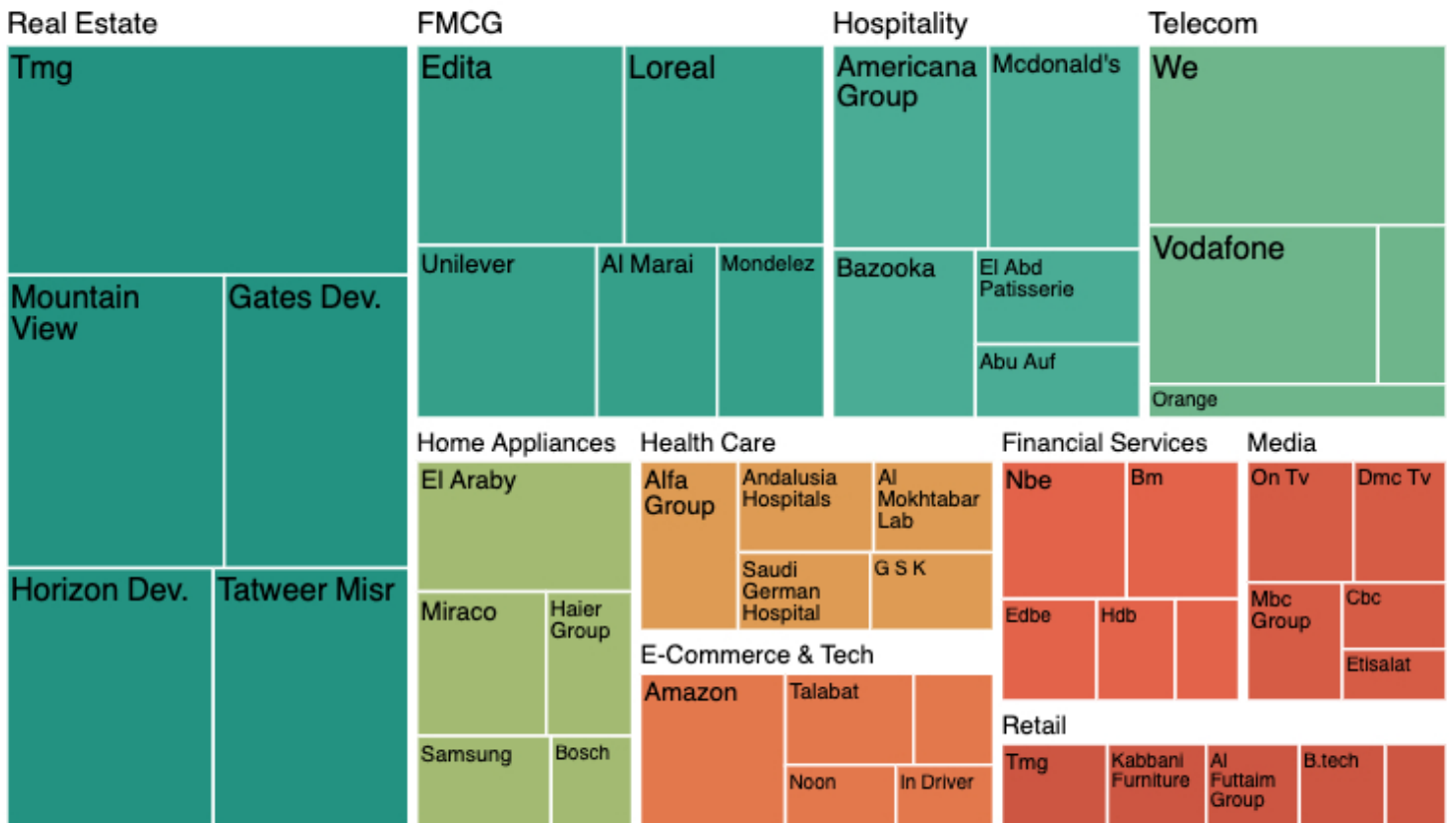
Marketshare for Select Industries



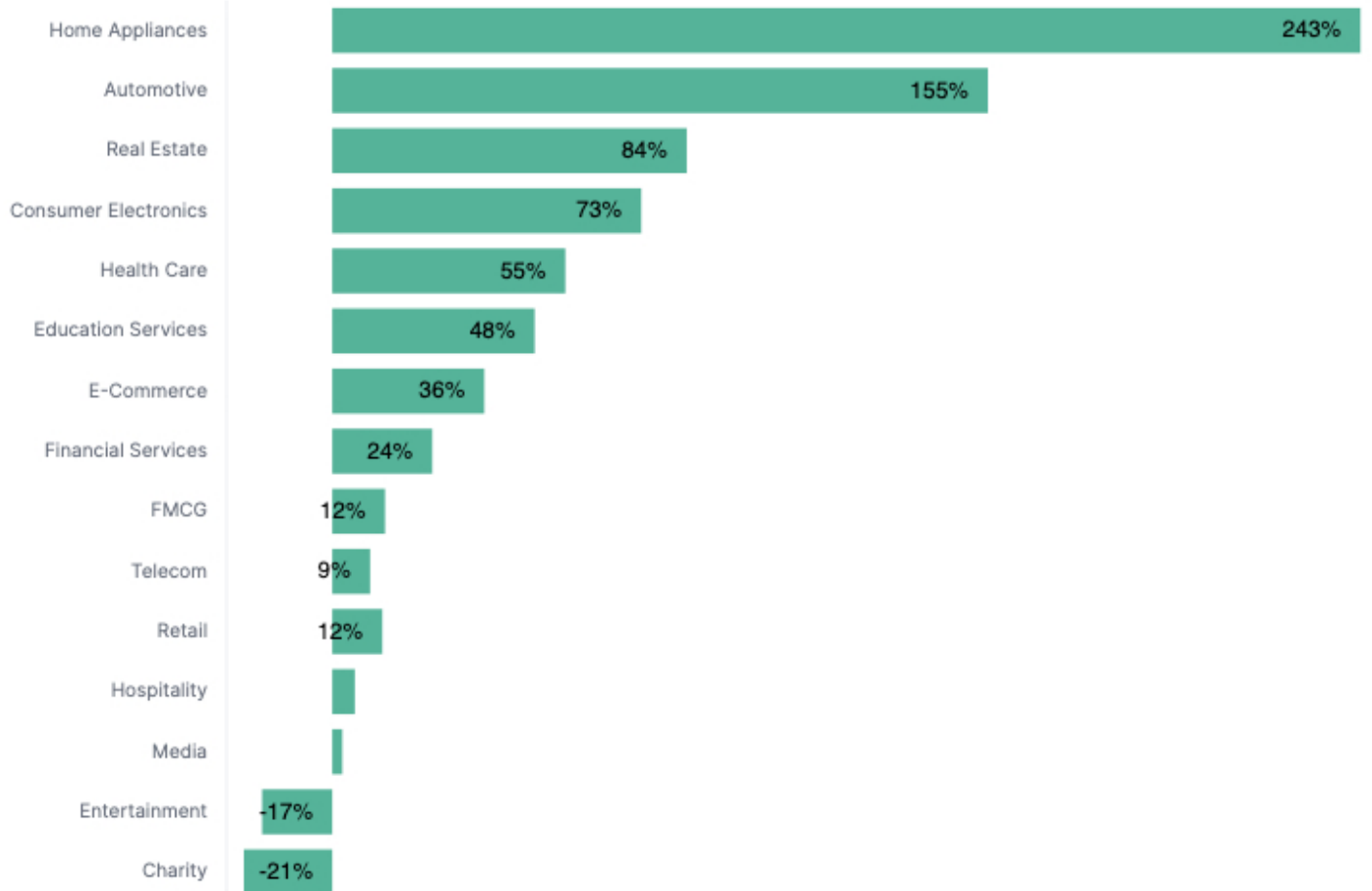
Sector Performance:

- **Real estate** continued to dominate the market, with a **10%** increase in market share.
- **Healthcare** advertising experienced a **40%** increase in advertisers.
- The **automotive** sector witnessed a strong resurgence, with a **43%** increase in advertisers and a **155%** increase in expenditure.
- **Home Appliances** saw a substantial **243%** growth in expenditure and **36%** increase in advertisers.
- **Media** sector exhibited flat expenditure.
- **Retail** and **FMCG** sectors each experienced a **12%** growth in market size.
- Only the **Entertainment**, and **Charity** sectors experienced a decline in advertising spend.

Top 5 Advertisers in Select Sectors



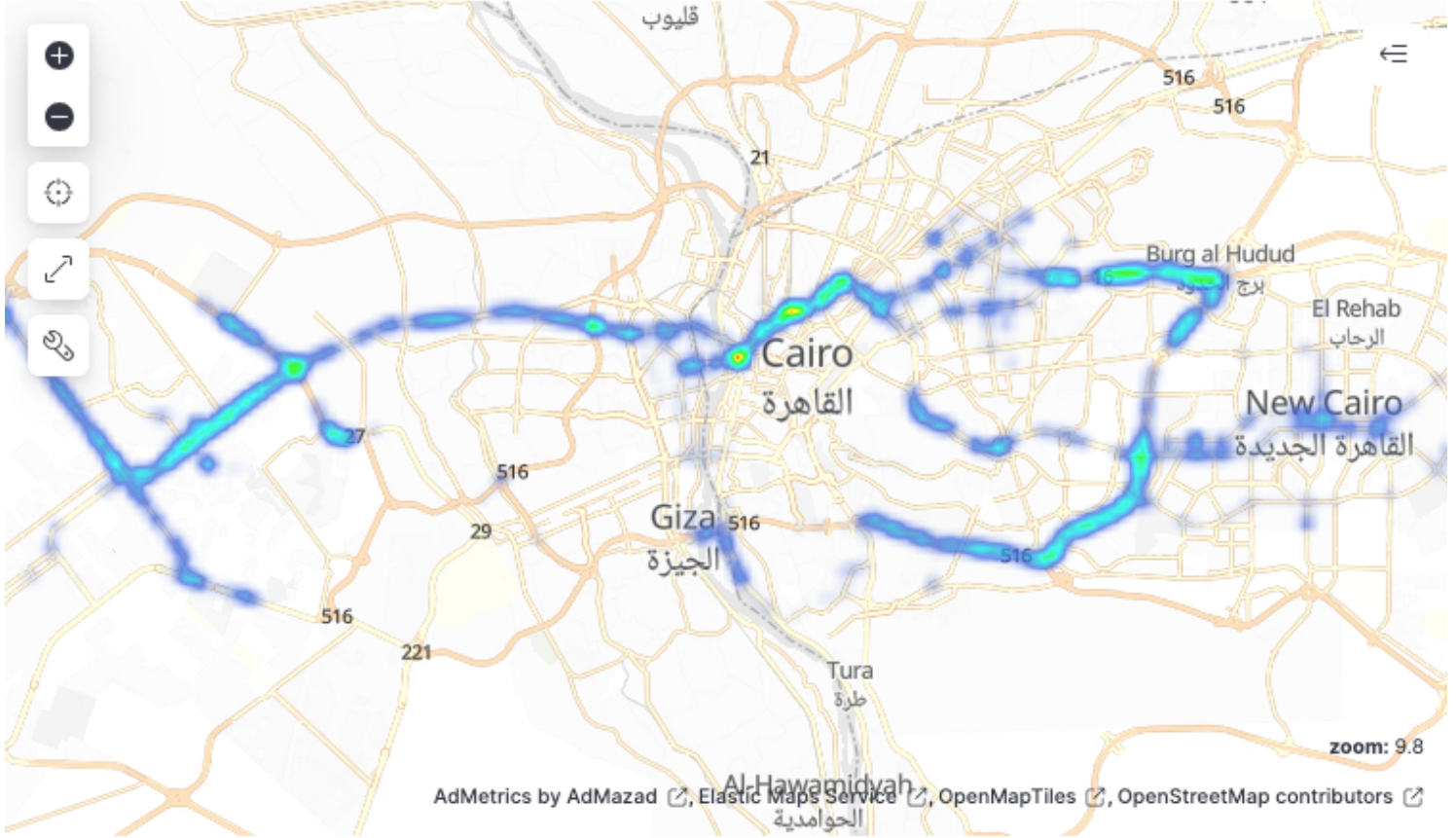
Annual Growth in Expenditure for Select Sectors



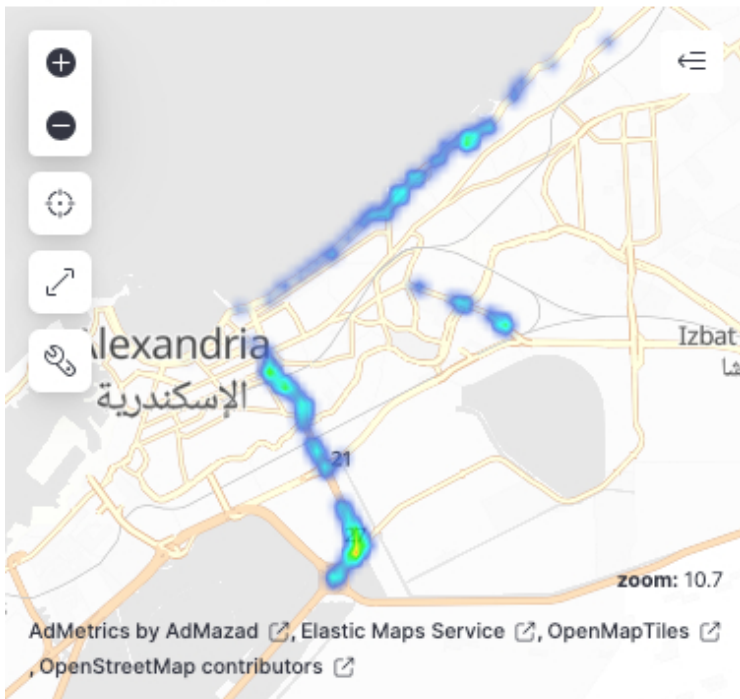
GEOGRAPHICAL PERFORMANCE



Cairo AdSpace Heatmap



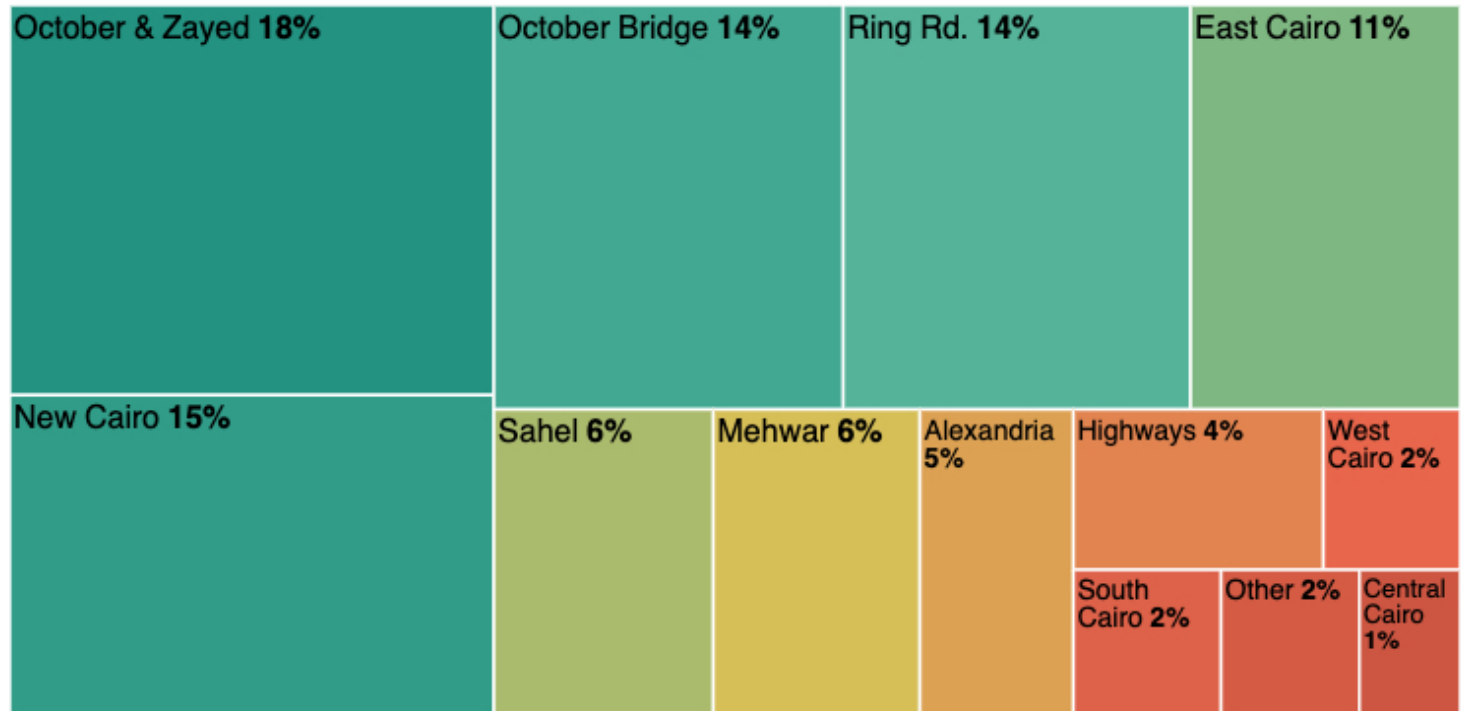
Alex AdSpace Heatmap



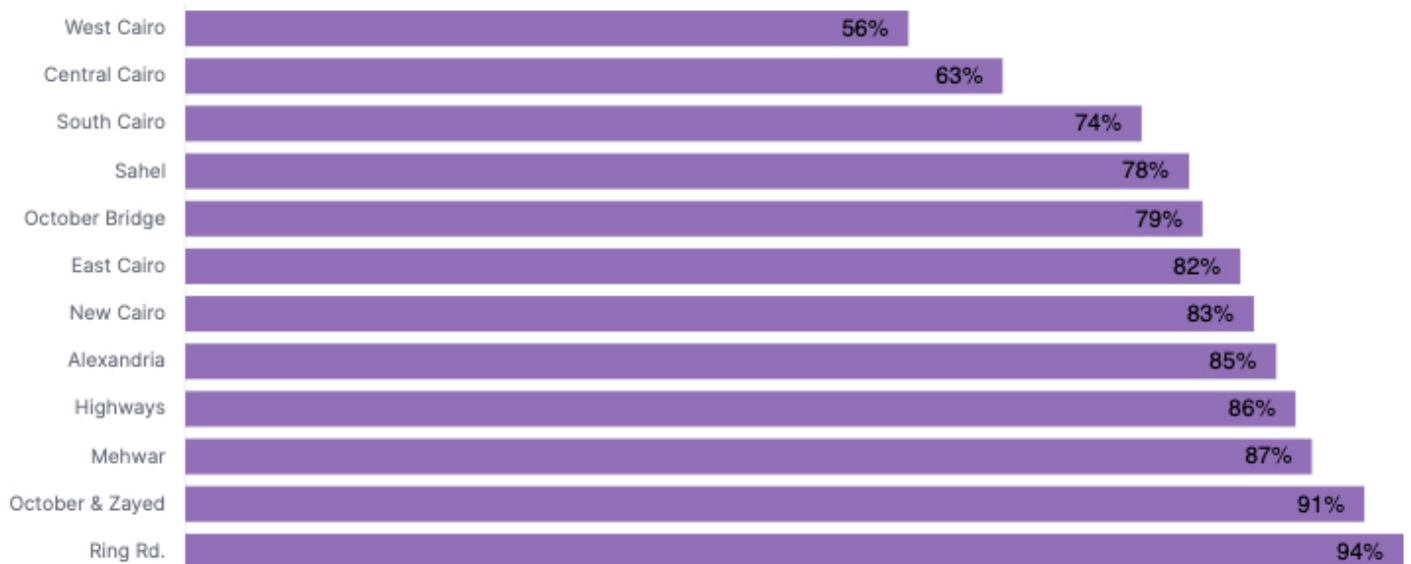
Delta AdSpace Heatmap



Expenditure Share



Geographical Utilization Rate



Regional Performance:

- The **Ring Road** achieved the highest utilization rate (**96%**) and new message rate (**79%**), indicating high demand and effective campaign execution.
- **Zayed**, despite leading in billings, had a lower new message rate (**66%**) compared to **New Cairo (77%)**, suggesting potential areas for improvement in campaign dynamism.
- The re-opening of licensing opportunities in **New Cairo** played a crucial role in driving inventory growth, meeting demand, and attracting new advertisers.
- Areas such as **West and South Cairo** (Mohandeseen, Agouza, Dokkia, Maadi) underperformed, reflecting the continuous population and market shifts to the **outskirts** of Greater Cairo.

KEY FINDINGS & RECOMMENDATIONS



Key Findings:

- The Egyptian OOH market demonstrates strong growth, driven by factors such as increasing **urbanization**, evolving **consumer behavior**, and the expansion of **DOOH** inventory in 2023 and 2024 consecutively.
- The landscape is dynamic, with a shift in focus from traditional city centers to **suburban areas** like **New Cairo** and **Zayed**.
- **Sector performance** varies significantly, with strong growth in sectors like Home Appliances, Real Estate, Healthcare, and Automotive, while others like Entertainment, Charity, and Media faced challenges.
- High utilization rates present both **opportunities** and **challenges** for advertisers and media owners.
- The high number of new advertisers entering the market **nearly 25% in 2024** indicates a growing recognition of OOH as an effective marketing channel.

Recommendations:

- Advertisers and media owners should closely monitor **market trends** and adapt their strategies to changing consumer behavior and urban development **patterns**.
- **Leveraging data and analytics** to optimize campaign performance and identify emerging opportunities is crucial.
- Exploring innovative OOH formats and technologies can enhance campaign **effectiveness** and **reach**.
- Building strong **relationships** with key stakeholders in the OOH ecosystem is essential for navigating the evolving market landscape.
- Industry players should provide **education** and **support** to new advertisers to help them effectively leverage the power of OOH advertising.

Overall, the Egyptian OOH market presents a dynamic and evolving landscape with significant growth potential. By understanding the key trends, adapting strategies, and leveraging data-driven insights, advertisers and media owners can navigate the market effectively and achieve successful campaign outcomes.

TRANSFORM YOUR OUTDOOR ADVERTISING WITH AdMetrics

Data-Driven Insights for Smarter OOH Campaigns



AdMazad

About AdMazad & AdMetrics

AdMazad is revolutionizing the Egyptian OOH advertising landscape. We are a data-driven company that provides end-to-end solutions for planning, booking, and optimizing OOH campaigns.

Our proprietary platform, **AdMetrics**, leverages real-time data and advanced analytics to quantify the impact of OOH advertising. This empowers advertisers to make data-driven decisions, optimize their campaigns, and achieve maximum ROI.

AdMazad offers a comprehensive suite of services to streamline your OOH advertising experience:

- **OOH Campaign Management:** Our team of experts will handle everything from campaign planning and budgeting to execution and reporting, ensuring high-performing, data-powered OOH campaigns.
- **OOH Plan Validation & Optimization:** Gain peace of mind with AdMazad's data-driven approach. We assess your OOH proposals using our proprietary methodology and performance metrics to identify and optimize the option with the highest reach and impact.
- **Competitive Landscape Analysis:** Stay ahead of the curve with AdMazad's market insights. We monitor over 3,000 billboards monthly, providing in-depth understanding of how OOH is used within your sector and by your competitors. Our AdMetrics dashboard allows you to benchmark your campaign against relevant peers.
- **Design Guidelines:** AdMazad's design consultants will provide technical guidelines to help you develop impactful and eye-catching OOH creative materials.
- **End-of-Campaign Reporting:** Receive comprehensive reports analyzing campaign performance and geographical drivers of success. Our competitive benchmarking helps you understand your performance relative to peers and look-alike audiences.
- **OOH Market Insights:** As a leading data aggregator for OOH across Egypt, AdMazad provides you with up-to-date market insights to inform your OOH strategies.

Partner with AdMazad and unlock the full potential of OOH advertising!

Get in touch at info@admazad.com to get started!

AdMazad Glossary

Term	Description
Dwell Time	Average Time to view a given billboard in peak traffic
Impressions	Calculated vehicular count passing by the faces of a given billboard
TVT	Total Viewed Time measures the duration a campaign is viewed across selected locations
Utilization Rate	Measures rate of utilization vs vacancy.
CpVT	Cost per Viewed Time measure in EGP the cost of viewership allowing planners to optimize and benchmark against Dwell Time, Impressions
CPM	Cost per Thousand Impressions is a similar measurement system to allows to optimize and benchmark against cost of impressions . A lower CPM is more effective for mass campaigns but can reflect lower quality locations
Impression Lift	Measures performance against peers and competitors. Positive Reach Lift implies campaign expenditure resulted in a higher share of impressions than its expenditure share and vice versa
Viewership Lift	Measures performance against peers and competitors. Positive Viewership Lift implies campaign expenditure resulted in a higher share of Viewership than its expenditure share and vice versa
Geographic Variance	A measure of the geographic disbursement in relation to peers and competitors.