Adobe

Report

The Middle East Digital Shift: From Vision to Execution

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Executive Summary

The Middle East is a dynamic and exciting region undergoing rapid change, and nowhere is this more evident than in the sphere of digital technology and its impact on both consumers and businesses.

Digital transformation is a strategic economic necessity as countries across the region shift toward economies driven by knowledge and innovation to attract foreign investment, stimulate economic growth, and create jobs on a massive scale.

This report — based on a survey of businesses in the Kingdom of Saudi Arabia (KSA), Egypt, Kuwait, Qatar, and the United Arab Emirates (UAE) — explores the digital trends in the region, the challenges organisations face, and the opportunities for those who can execute on their digital vision.

Its findings paint a clear picture of where the region's businesses are placing their big bets: Digital transformation, the adoption of technology, and the integration of AI and automation all rank high on their list of priorities.

Respondents are also typically confident they can deliver personalised customer experiences across all digital touchpoints. Just under two-thirds (61%) believe their cloud infrastructure is 'very mature', and almost nine out of ten (88%) are either experimenting with AI, or have already implemented it.

Of course, opportunities remain. Integration of business systems within organisations remains patchy as more than half of respondents (57%) have only 'partially' implemented API-driven architectures. A similar proportion (54%) rate their tech stack as only 'moderately effective'.

From a leadership perspective, digital transformation efforts in the region are overwhelmingly led by the IT function, contrasting with findings from our North American and European study where more distinct digital functions and cross-functional teams have emerged to spearhead digital transformation.

Suzanne Steele

VP and MD for Adobe in the UK, Ireland, Middle East and Africa

Recommendations for success

This report makes six key recommendations for companies looking to capitalise on the digital opportunity:

Ensure you're a 'digital-first' business. Focus on being able to respond quickly and positively to the waves of technological and social change.

Share responsibility for digital transformation around. While IT often leads digital transformation efforts, lasting impact requires close alignment with business priorities — it's a strategic and organisational challenge as well as a technological one.

Prioritise measurement. Robust, trustworthy measurement is vital to good decision-making, proving ROI, and building long-term stakeholder confidence.

Energise your entire business around AI. There is an opportunity to embed AI more deeply and strategically across the business, rather than in isolated use cases.

Strengthen your competitive advantage by improving the quality of your customer experience. The key to success in this region is meeting the expectations of young and tech-savvy demographics.

Address your content supply chain. The only way to deliver at scale is by harnessing AI for content production, workflow and document management.

Generate

Create Instagram ads to promote stocks restocked today.

Zuvia

BACK IN STOCK

Looks great! Approved
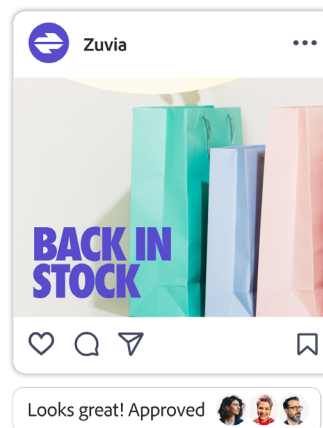
Localise

Arabic

Persian

Turkish

Methodology

Adobe commissioned London Research to carry out an online survey of 200 large businesses across the Middle East region in April 2025. All businesses surveyed had annual revenues of at least US$500m, with respondents in KSA, Egypt, Kuwait, Qatar, and UAE.

All respondents were at least at senior-manager level, with 80% of those surveyed at head of department, director or C-suite level. Respondents came from a range of business sectors and job functions.

200
Large businesses

$500m+
Revenue

80%
Senior management

KUWAIT

EGYPT

SAUDI ARABIA

QATAR

UNITED ARAB
EMIRATES

Section 1: The economic and consumer trends driving investment and transformation into a digital economy

Everywhere you look, digital transformation is being driven by a complex interaction of forces — including geography, demographics, culture, technological history, and government policy. But while these forces are present globally, their relative importance and influence vary by region.
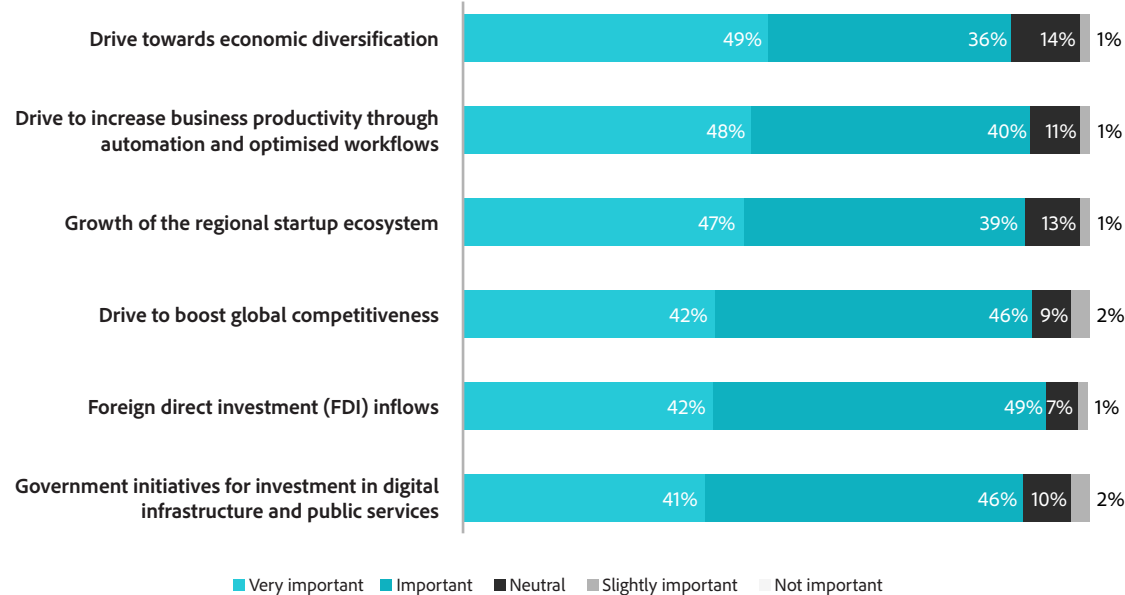
In the US, the most powerful force in digital transformation is market competition, with businesses vying for an advantage. In Europe, regulations (particularly the EU) play a more significant role. However, in some Middle Eastern countries, governments take the lead in driving national digital agendas, complemented by private sector innovation.

Across the region, digital transformation is a matter of national strategy. Countries are investing heavily in digital technology to reduce their dependency on oil as they seek to diversify and increase business productivity. There is a strong focus on innovation, entrepreneurship, and R&D to future-proof the region's economies. The vast majority of the 200 businesses surveyed in the region regard all the trends listed in *Figure 1* as 'important' or 'very important'. The 'drive towards economic diversification' (49%), the 'drive to increase business productivity through automation and optimised workflows' (48%), and 'growth of the regional startup system' (47%) are most likely to be regarded as 'very important'.

Figure 1: Importance of economic trends in influencing organisational strategy.

Trend	Very important	Important	Neutral	Slightly important	Not important
Drive towards economic diversification	49%	36%	14%	1%	
Drive to increase business productivity through automation and optimised workflows	48%	40%	11%	1%	
Growth of the regional startup ecosystem	47%	39%	13%	1%	
Drive to boost global competitiveness	42%	46%	9%	2%	
Foreign direct investment (FDI) inflows	42%	49%	7%	1%	
Government initiatives for investment in digital infrastructure and public services	41%	46%	10%	2%	

■ Very important ■ Important ■ Neutral ■ Slightly important ■ Not important
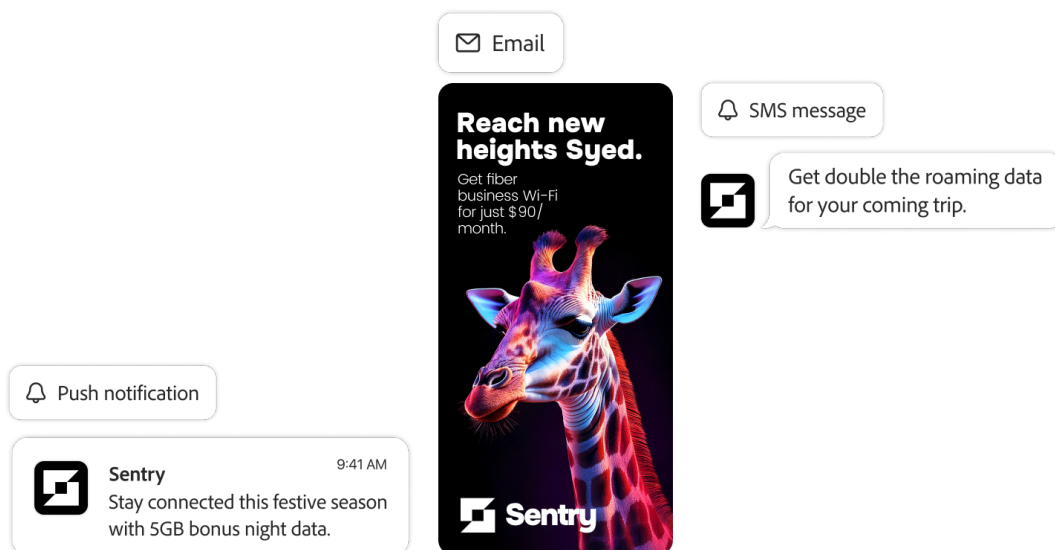
n = 200

User-led demand.

However, this unprecedented top-down momentum is complemented by bottom-up, user-driven demand — from both consumers and business dealings. The region's populations are young, affluent, and tech-savvy, creating strong expectations for personalised digital experiences. Among the countries represented in our survey, Egypt has the youngest population with a median age of 24.4 years[1]. Kuwait has a median age of 30.3 years, KSA 32.4 years, Qatar 34.3, and the UAE 35.8 years. For comparison, the U.S. has a median population age of 38.5 and for the EU that figure is higher still, at 44.7.

In terms of wealth, Qatar ranks third globally for GDP per capita[2]. The UAE is 12th, KSA ranks 25th, and Kuwait 37th. While Egypt stands apart in its economic trajectory, ranking 92nd on the list of 181 countries, its growing population, young workforce, and large market size represents significant long-term potential. Countries in the region also rank among the highest users of social media globally — another sign of digital penetration across the region. The UAE tops the global list[3], with an active social media penetration rate of 100%.KSA stands second, with 99.6%, and Qatar is seventh, with 84% — well above the global social media penetration rate of 64%.

Affluence across countries like Qatar, the UAE, Saudi Arabia, and Kuwait raises the bar for digital experiences. Wealthier consumers expect fast, seamless, and personalised interactions, for these affluent segments, digital excellence isn't a bonus; it's part of a brand's promise. Businesses that do not invest in digital innovation (e.g., luxury retail with AI personalisation) risk being seen as inefficient or outdated.

This makes digital transformation a revenue driver, not just a cost. Affluent customers are more likely to pay for premium, digital-first services and support higher margins for businesses that innovate. They're also more mobile and geographically dispersed, making high-quality digital channels essential for engagement. Even in less affluent but high-potential markets like Egypt, digital adoption is surging — signalling where future demand is headed.
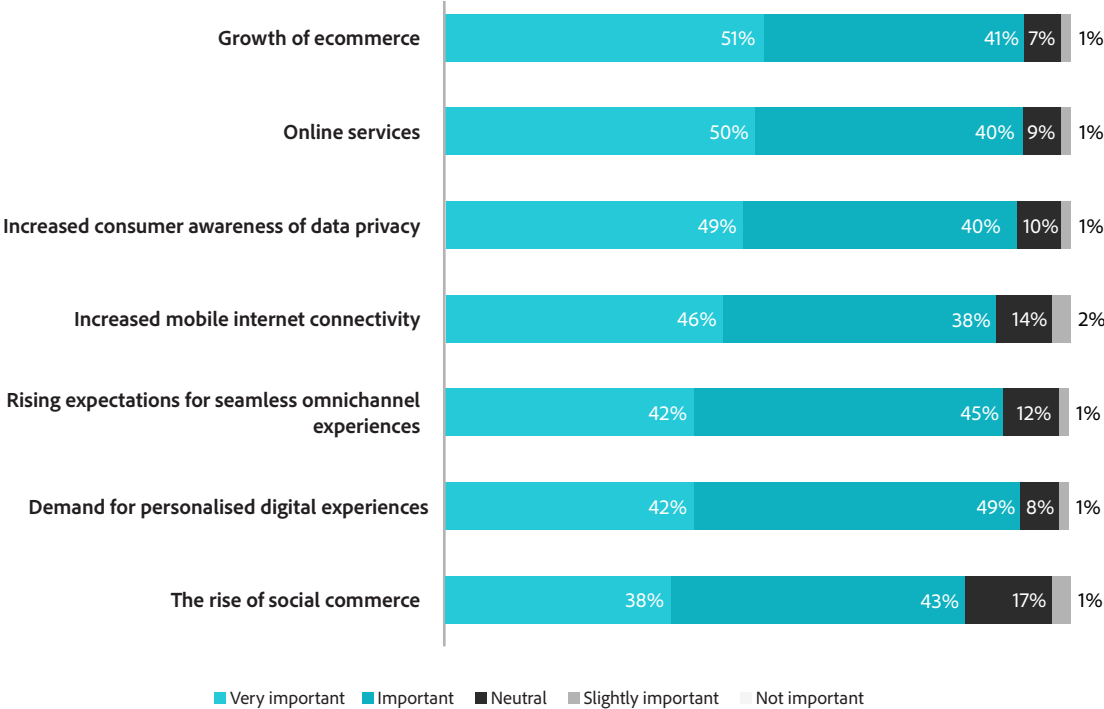

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[1] https://www.cia.gov/the-world-factbook/field/median-age/country-comparison/

[2] https://www.worldometers.info/gdp/gdp-per-capita/

[3] https://www.demandsage.com/social-media-users/

Digital transformation is also being driven by consumers and business demands for smoother, more intuitive customer experiences, and the ability to interact and transact online. (*Figure 2*). This exceptionally high social media penetration highlights that digital is already the default mode of engagement in the Middle East — making digital transformation not just an opportunity, but a necessity for businesses to remain visible, relevant, and competitive.

Figure 2: Importance of consumer-led trends on company strategy.

Trend	Very important	Important	Neutral	Slightly important	Not important
Growth of ecommerce	51%	41%	7%	1%	
Online services	50%	40%	9%	1%	
Increased consumer awareness of data privacy	49%	40%	10%	1%	
Increased mobile internet connectivity	46%	38%	14%	2%	
Rising expectations for seamless omnichannel experiences	42%	45%	12%	1%	
Demand for personalised digital experiences	42%	49%	8%	1%	
The rise of social commerce	38%	43%	17%	1%	

■ Very important ■ Important ■ Neutral ■ Slightly important ■ Not important

n = 200

The growth of ecommerce (51%) and online services (50%) are the consumer trends most likely to be regarded as 'very important'. Most companies also recognise the importance of other trends, such as the continuing rise of the mobile internet usage (46% said it was 'very important') and increasing demand for both seamless and personalised experiences (both regarded as very important by 42% of respondents).

These findings present an opportunity to explore what sets leading companies apart in each of these key trends. In e-commerce and online services, leaders focus on building integrated platforms that connect seamlessly with social channels, enabling consistent messaging and cohesive customer journeys. For mobile, best-in-class organisations design experiences that work flawlessly across devices and channels, ensuring continuity wherever customers engage. In personalisation, they use advanced data orchestration and decision-making to deliver relevant content in real time. Underpinning all of this is strong organisational alignment — bringing together teams, processes, and technology around a single view of the customer. By framing the trends in terms of these differentiators, we can show how top performers turn market shifts into strategic advantage, without direct product references, while reinforcing the importance of integration, data-driven execution, and a unified customer focus.

Case study:
AlUla leads the way in digital tourism transformation in Saudi Arabia.

A cloud-first approach to global tourism.

Located in northwest Saudi Arabia, AlUla combines remarkable natural beauty with ancient historical sites. Visitors can explore the renowned UNESCO World Heritage site of Hegra, relax amid lush oasis scenery, scale impressive rock formations, or experience captivating cultural art, all designed to offer memorable and enriching experiences.

AlUla stands at the heart of a broader transformation within the Kingdom of Saudi Arabia. All eyes are on the nation as it prepares to host the 2034 FIFA World Cup, while reshaping itself into a global leader in both culture and commerce under the government's Vision 2030 program.

As part of this initiative, the Kingdom established the Royal Commission for AlUla (RCU) to develop the historic city into a tourist destination of choice. Through the **Experience AlUla** website, the RCU promotes the beauty of AlUla to travellers and provides a single platform for booking luxury hotels, cultural events, guided tours, and unforgettable experiences — before and during their stay.

To support this ambition, RCU launched the Experience AlUla platform, built on Adobe Experience Cloud, with three core objectives:

- **Drive sales on digital channels and boost the local economy through tourism growth**
- **Educate diverse global audiences about AlUla and Saudi Arabia**
- **Consolidate digital platforms to deliver relevant digital experiences more efficiently**

By migrating the Experience AlUla website onto Adobe Experience Manager Sites as a Cloud Service — RCU is one of the first government agencies to embrace a cloud-first approach in Saudi Arabia.

> " We're seeing a significant uplift in bookings through the website, with a 220% year-over-year increase to our conversion rate since migrating to Adobe Experience Manager Sites as a Cloud Service.
>
> **Nasri Nasr,**
> Head of Digital Transformation & Delivery,
> RCU

Adobe

Personalised customer journeys drive real results.

Personalisation is central to RCU's digital strategy. With Adobe Target and Adobe Campaign, the platform serves tailored content based on user location and interests, while region-specific push notifications and emails keep travellers engaged. These efforts drove a 72% increase in view-through rates and a 46% increase in click-through rates.
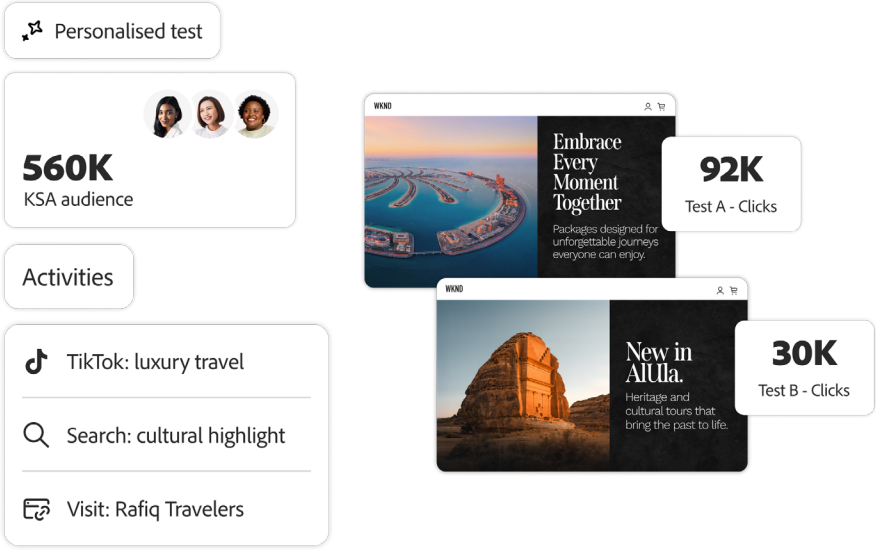
To broaden reach, RCU launched a global campaign targeting nine international markets in five languages, using microsites customised with market-specific visa info, packages, and cultural content. This led to an 8.5× increase in website visits and a 23% drop in bounce rates, all supported by a robust and stable platform.

RCU's flexibility was showcased during the AlUla World Archaeology Summit, where a dedicated microsite was built in just weeks using modular components — a process that would have previously taken months. This same content approach now powers frequent updates to the mobile app, contributing to a 240% year-over-year increase in revenue from mobile bookings.

Looking forward, RCU aims to deepen personalisation by tailoring digital content to travellers' specific interests across its five experience pillars — arts and culture, history and heritage, adventure, nature, and wellness — while exploring AI-powered content tools to accelerate campaign creation and keep AlUla at the forefront of digital tourism innovation in the Middle East.

💡 Key takeaway

Digital transformation in the Middle East means building unified digital ecosystems that fuel rapid innovation, smart decision-making, and scalable customer experiences. Driven by strong government initiatives and rising consumer expectations, success depends on solid digital foundations — integrated platforms, a single source of truth for data, and the elimination of operational silos — all aligned to deliver real, measurable business outcomes.

Personalised test

560K
KSA audience

Activities

TikTok: luxury travel

Search: cultural highlight

Visit: Rafiq Travelers

WKND

Embrace Every Moment Together

Packages designed for unforgettable journeys everyone can enjoy.

92K
Test A - Clicks

WKND

New in AlUla.

Heritage and cultural tours that bring the past to life.

30K
Test B - Clicks

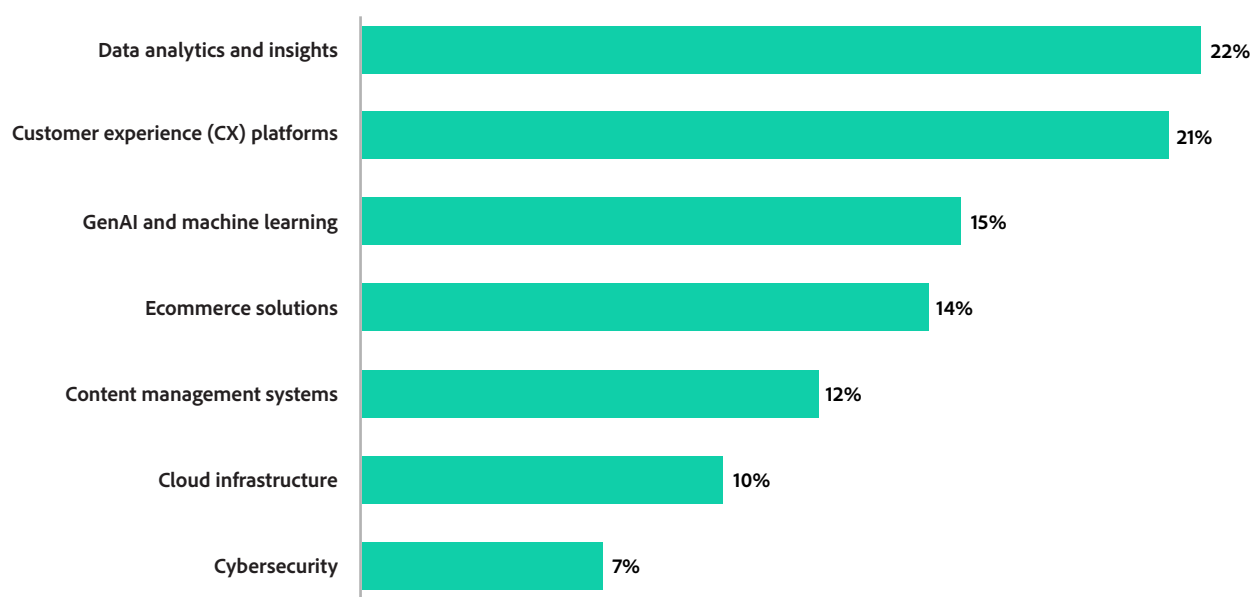# Section 2: The business imperative for digital technology investment

So which business competencies are companies across the region prioritising in response to the trends outlined in the previous section?

As *Figure 3* shows, there are three stand-out capabilities. Around a quarter of respondents (24%) regard the ability to transform the business digitally as paramount over the next five years. In joint second place comes AI and automation integration along with data-driven decision-making, each at 21%. The order or priority here is most likely explained by the desire to become a digital-first organisation before AI and analytics can be leveraged to their full potential.

A digital-first approach means an organisation's operations, customer interactions and internal processes are already digitalised, generating a continuous stream of data. Without this digital foundation in place, data becomes scattered across disparate systems, in inconsistent or unusable formats. AI models work more effectively when they have vast amounts of high-quality data to learn from to identify patterns and make predictions.

Furthermore, when processes are digital and streamlined, they become more efficient and consistent, creating a fertile ground for AI to further automate tasks, improve workflows and reduce errors.

Figure 3: Which competency is most likely to become more important over the next five years?

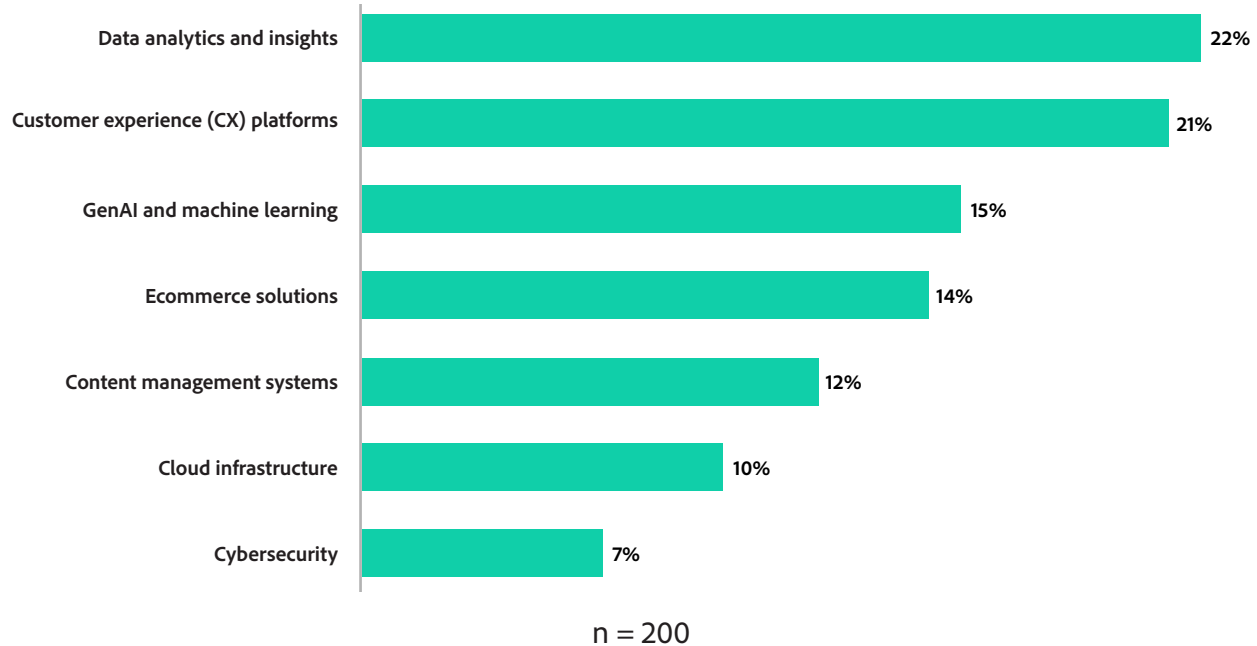| Competency	Percentage
Data analytics and insights	22%
Customer experience (CX) platforms	21%
GenAI and machine learning	15%
Ecommerce solutions	14%
Content management systems	12%
Cloud infrastructure	10%
Cybersecurity	7%

n = 200

The technologies required to deliver profit and business growth.

This competency focus is broadly reflected in how responding companies rate the impact of different technologies on the bottom line and business growth (*Figure 4*).

Figure 4: Most important technologies in order of their impact on the bottom line/ business growth.

Technology	Percentage
Data analytics and insights	22%
Customer experience (CX) platforms	21%
GenAI and machine learning	15%
Ecommerce solutions	14%
Content management systems	12%
Cloud infrastructure	10%
Cybersecurity	7%

n = 200

A fifth (21%) of respondents say customer experience platforms are the most significant driver of business success, almost the same percentage as data analytics. This focus on CX technology is consistent with the emphasis placed on digital transformation as a core competency over the next five years.
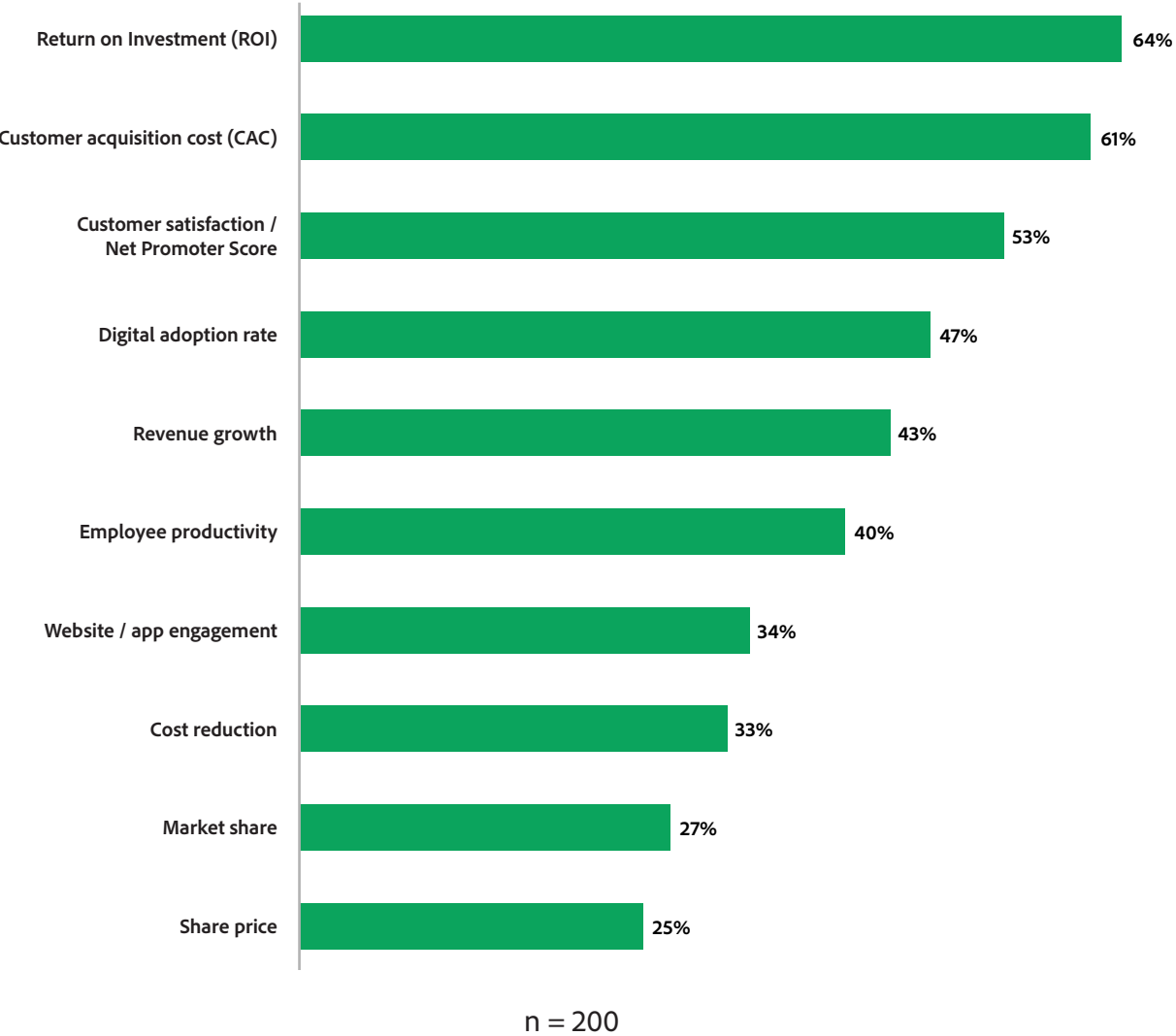
Another fifth (21%) of respondents say AI is most likely to become more important as a competency, a smaller proportion (15%) think AI and machine learning is the most influential technology for impacting profitability and growth. This discrepancy shows that AI still has a long way to go to fulfil its potential, with many seeing data analytics and insights as the most crucial technology for business growth — underscoring the need not just for analytics tools, but for integrated, intelligent systems that can activate data across the customer journey, in real time, and at scale.

Cloud technology and cybersecurity rank lowest among technologies impacting growth — not due to lack of importance, but because they're now viewed as essential infrastructure. What sets businesses apart is how they build on that foundation: using AI, analytics, and CX platforms to create smarter, more seamless, and differentiated customer experiences at scale.

Measuring the impact of digital transformation.

While digital transformation is increasingly recognised as a strategic imperative in the region, many companies continue to measure its success using traditional business metrics — potentially missing the full value digital can deliver across customer experience, innovation, and agility. (*Figure 5*).

Figure 5: Most important metrics or key performance indicators for measuring the impact of digital initiatives and transformation programs.

Metric	Percentage
Return on Investment (ROI)	64%
Customer acquisition cost (CAC)	61%
Customer satisfaction / Net Promoter Score	53%
Digital adoption rate	47%
Revenue growth	43%
Employee productivity	40%
Website / app engagement	34%
Cost reduction	33%
Market share	27%
Share price	25%

n = 200

Nearly two-thirds of respondents cite ROI (64%) and customer acquisition cost (61%) as their most important KPIs. Customer satisfaction and Net Promoter Score metrics (53%) also feature prominently. This reflects a growing recognition among companies in the region of the demanding experience-driven customer base — a clear understanding of the correlation between exceptional customer experience and business success. These KPIs highlight the need for advanced analytics platforms that provide unified, real-time insights. When applied effectively, such tools can drive measurable improvements in marketing efficiency, customer loyalty, and business growth—linking customer experience directly to financial performance.

In fourth place is the digital adoption rate, chosen by 47% of respondents. This is the highest-ranking metric that aligns explicitly with the broader national digital objectives, although ultimately the success of digital transformation will not be based solely on adoption metrics, but its ability to deliver tangible top-and bottom-line benefits for the organisation.

💡 Key takeaway

Companies in the region invest in integrated systems and high-quality data, but leaders stand out by using AI, analytics, and CX platforms to deliver smarter, seamless experiences at scale. There's growing recognition that exceptional customer experience drives business success, with KPIs highlighting the need for real-time analytics. When used effectively, these tools drive marketing, loyalty, and growth, turning customer experience into measurable financial results.

💬 Ask Analytics

Identify high-value customers?

Nadine Saidi

Audience
Frequent traveler

@ Real-time profile

4,033
User growth: Active

● Click-throughs   ● Campaign delievery
865   **90%**

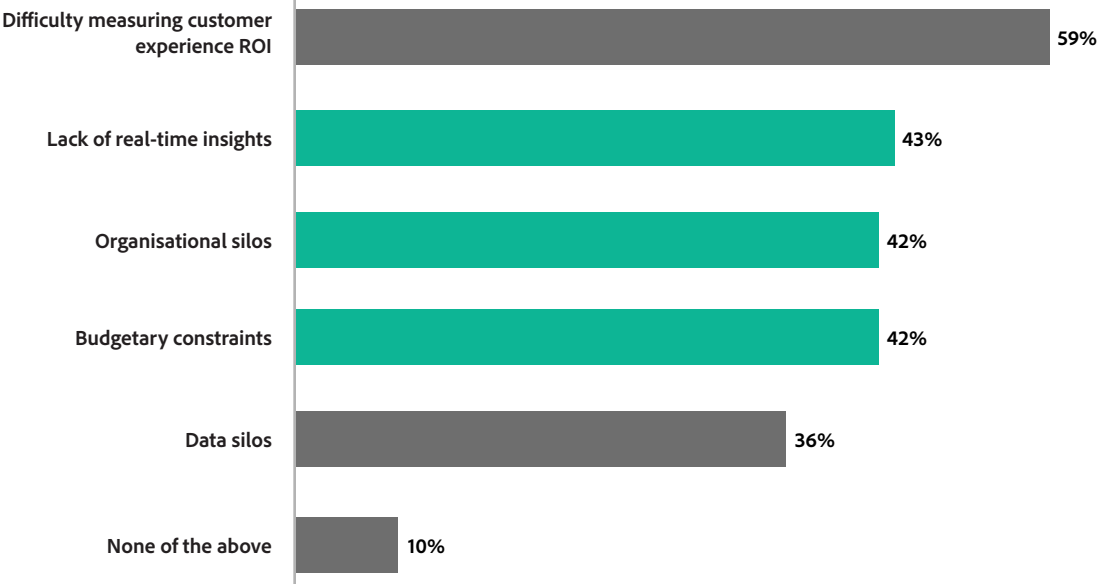# Section 3: An era of personalised customer experiences

According to the research, many businesses across the region view high-quality customer experiences as a key competitive differentiator. But they face various challenges in delivering on this ambition (*Figure 6*). The most pressing issue is difficulty in measuring the ROI of customer experience improvements, reported by 59% respondents as a major challenge. This is also closely tied to overcoming the budgetary constraints as identified by 42%. It's difficult to justify increased investment without a clear demonstration of impact.

In many cases, difficulty measuring ROI stems from a disconnect between strategy and execution — whether due to fragmented data, lack of internal capabilities, change management gaps, or unclear KPIs. Mapping digital technology investment to organisational objectives such as customer loyalty and customer acquisition is fundamental to supporting the business case for on-going digital investment.

A lack of real-time customer insights is another obstacle affecting 43% of the businesses surveyed. This issue stems from the same root causes that contribute to difficulty understanding ROI. Disconnected systems, siloed data, a lack of unified customer views, all of which make it difficult to respond to customer needs instantly with the right information or personalisation that today's consumers expect.

To address these challenges, Adobe is committed to composable architectures and technology components which support integration across the tech stack. This approach enables businesses to deploy and connect capabilities such as decisioning, activation, analytics, and content delivery that are modular, easy to integrate and scalable.

Figure 6: Which of the following are significant obstacles to achieving a unified customer experience within your organisation?

Obstacle	Percentage
Difficulty measuring customer experience ROI	59%
Lack of real-time insights	43%
Organisational silos	42%
Budgetary constraints	42%
Data silos	36%
None of the above	10%

n = 200

Organisational and data silos are also widely reported challenges, by 42% and 36% of respondents respectively. This reiterates the need for greater digital transformation capabilities reported in *Figure 3*. It also echoes the almost equal weight given to data analytics technology and CX platforms, as seen in *Figure 4*.

Becoming digital-first.

Many businesses are clearly still working on two pillars of becoming digital-first organisations. The first is the integration of data across the business to create a 'single source of truth' about existing and prospective customers. This is essential for accurate, data-driven decision-making. The second aspect is to reconfigure the organisational structure and culture around the customer journey, ensuring every team, process, and decision is aligned to deliver value to the customer at every stage.

Both these issues are often hampered by legacy technology. This makes the all-important data transfer between systems difficult. In turn, it prevents companies from accessing and applying real-time insights which makes it impossible to deliver relevant experiences to customers or prospects. Addressing these barriers requires a unified data foundation and tools that enable real-time insights and journey orchestration. Organisations that break down silos and align teams around customer journeys are better equipped to deliver relevant experiences — turning fragmented data into measurable impact.

Despite these challenges, companies are generally satisfied with their ability to deliver unified and personalised customer experiences across all touchpoints. Over half of respondents (56%) rate their ability to deliver unified and personalised experiences as 'good'. However, only 29% describe this capability as 'excellent', (*Figure 7*).

Figure 7: How would you rate your organisation's ability to deliver a unified and personalised customer experience across all touchpoints?

Excellent 29%
Good 56%
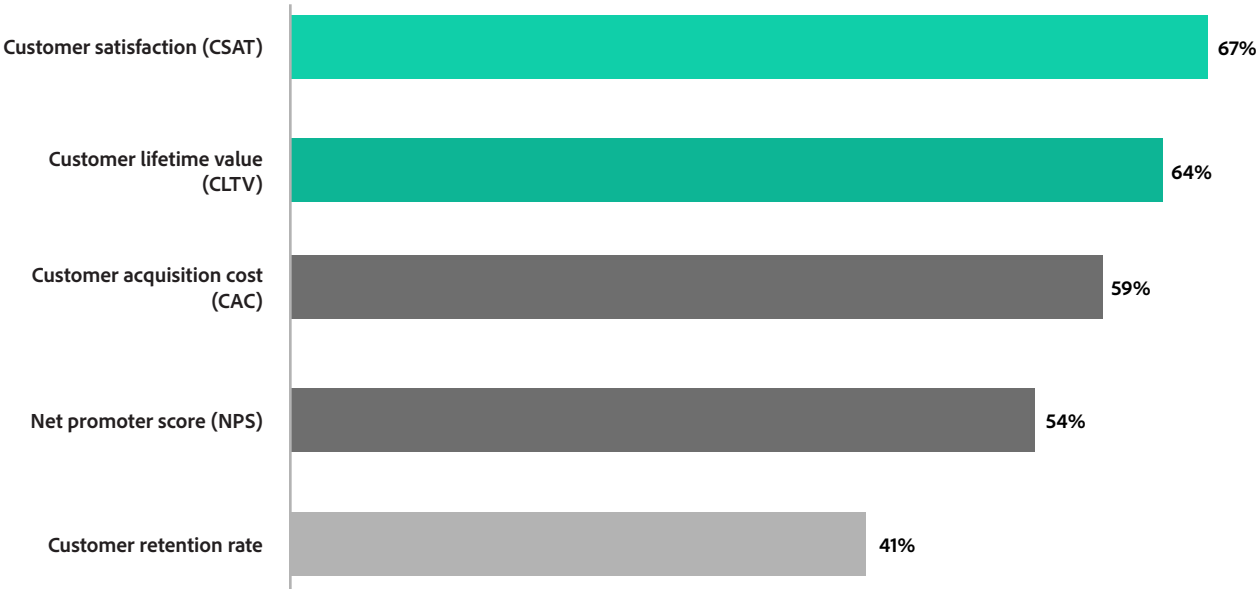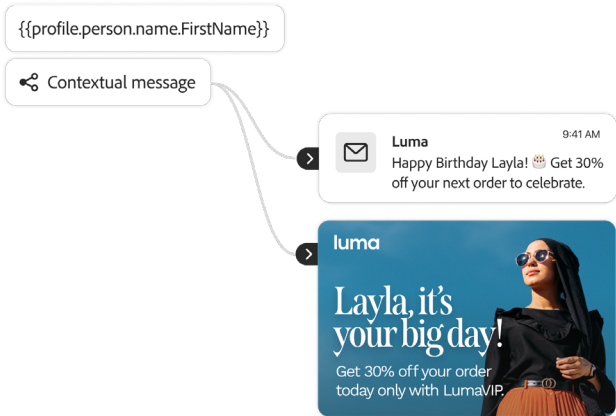Moderate 13%
Poor 1%
Very poor 1%
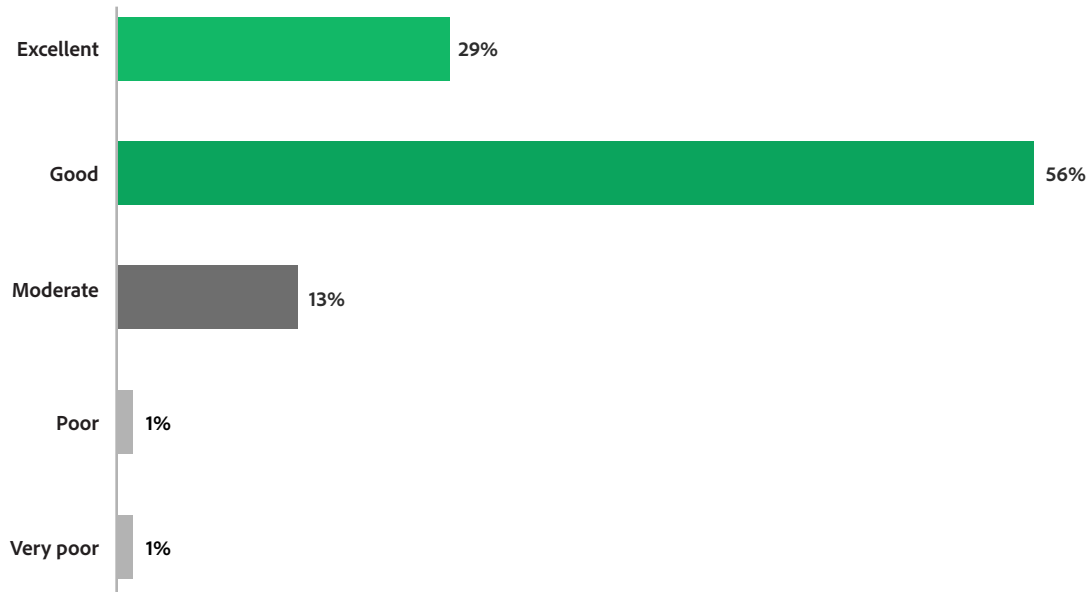
n = 200

Figure 8 shows the KPIs that organisations in the region see as most critical when measuring customer experience.

The most important metrics are customer satisfaction (67%) and customer lifetime value (64%), each selected by around two-thirds of respondents. Net Promoter Score was also widely chosen (54%). Interestingly, more than half chose customer acquisition cost (59%), while only 41% regard customer retention rate as critical. Acquiring new customers is typically more expensive than retaining existing ones, so making both acquisition and retention an equal priority is crucial for sustainable business growth. Digital transformation enhances customer loyalty by unifying data, enabling real-time personalisation, and streamlining customer journeys. When businesses align technology, content, and teams around the full customer lifecycle, they create seamless, relevant experiences that drive retention — often more effectively than traditional loyalty programs alone.

Figure 8: Which KPIs are most critical for your organisation in measuring customer experience success?

KPI	Percentage
Customer satisfaction (CSAT)	67%
Customer lifetime value (CLTV)	64%
Customer acquisition cost (CAC)	59%
Net promoter score (NPS)	54%
Customer retention rate	41%

n = 200

{{profile.person.name.FirstName}}

Contextual message

Luma   9:41 AM
Happy Birthday Layla! 🎂 Get 30% off your next order to celebrate.

luma

Layla, it's your big day!
Get 30% off your order today only with LumaVIP.

Case study: Qatar Tourism makes personalisation a strategic marketing pillar.

In late 2020, Qatar Tourism set out to move beyond its collection of outdated, static websites and establish personalisation as a core component of its marketing strategy. The organisation aimed to use data to transform every step of the customer journey, guided by a deep understanding of traveller needs.

To achieve this, Qatar Tourism partnered with Adobe to implement Adobe Experience Manager across its digital ecosystem, including its website, mobile app, and eCRM programme. The aim was to collect first-party data through newsletter sign-ups and email engagement, then leverage that data to create targeted, relevant communications. These in turn drove greater audience engagement.

In the first year:

✉ **Click-through rates for emails jumped 88%**	✉ **Email sign-ups rising by 155%**	⤓ **Over 100,000 people downloaded the Visit Qatar mobile app**

Berthold Trenkel, Chief Operating Officer, Qatar Tourism, said: "Adobe Experience Manager allows us to provide targeted, timely, and personalised experiences to travellers. That includes enhancing our VisitQatar mobile app so we can deliver 360-degree visitor experiences, including a festival and event calendar so people can get the latest on what's happening in Qatar during their trip."

Qatar Tourism increased email CTRs by 88% and drove more than 100,000 app downloads within a year of rolling out Adobe Experience Manager.
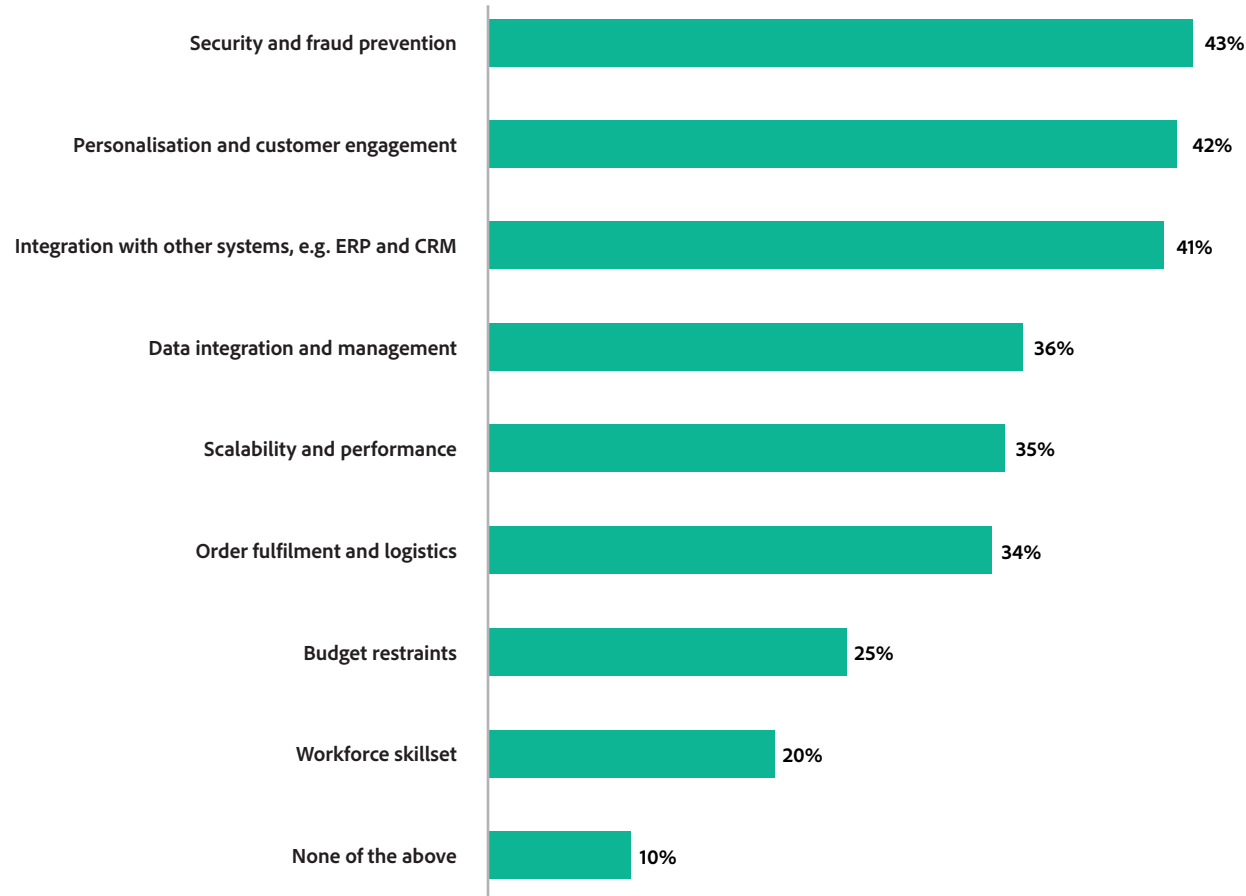
💡 Key takeaway

Delivering outstanding customer experiences is a critical competitive advantage that requires unifying data into a single source of truth and providing real-time insights. By breaking down silos and aligning teams around the customer journey, organisations can turn fragmented data into clear, measurable impact. At its core, this means integrating data and reshaping culture and structure to put the customer at the heart of every decision — essential steps to becoming truly digital-first.

Section 4: Overcoming commerce and technology challenges

While generative AI continues to dominate headlines in the world of business, companies face other more familiar challenges. *Figure 9* looks at these in more detail in the context of digital commerce.

**Figure 9: What are the key challenges your organisation faces in its digital commerce operations?**

Challenge	Percentage
Security and fraud prevention	43%
Personalisation and customer engagement	42%
Integration with other systems, e.g. ERP and CRM	41%
Data integration and management	36%
Scalability and performance	35%
Order fulfilment and logistics	34%
Budget restraints	25%
Workforce skillset	20%
None of the above	10%

n = 200

There are three issues most likely to be keeping senior executives awake at night. These challenges are

43% security and fraud prevention

42% personalisation and customer engagement

41% and systems integration

The next cluster of challenges are top-of-mind issues are data integration and management (36%), scalability and performance (35%), and order fulfilment and logistics (34%), each flagged by over a third of respondents. Additionally, a quarter of our respondents say budget restraints remain a problem, despite spending on information and communications technology in the Middle East, Turkey, and Africa were estimated to exceed USD238 billion in 2024[4].

It's no surprise that security and fraud prevention top the list of commerce challenges. Rising consumer and business worries make this a growing concern for companies worldwide, with retailers in the UK frequently targeted by hackers[5].

But the other challenges on the list go to the heart of an organisation's IT capabilities and digital transformation progress. As discussed, creating a unified, company-wide 'single source of truth' requires integrating data across all departments, not just marketing but across every customer touchpoint. It also means being able to integrate backend business systems to link resulting customer orders to fulfilment. The fact that a third (34%) of respondents are struggling with fulfilment and logistics suggests that the overall systems integration to be truly digitally transformed remains a work in progress for most businesses.

Even the appearance of budget restraints on this list points to problems with data and integration. Companies withhold investment in technology for two reasons: Either the technology fails to deliver on its promise, or the value it creates can't be measured or communicated.

Top-of-Mind Commerce Challenges

Data Integration

Scalability & Performance

Fulfilment & Logistics

Budget Constraints

Security & Fraud

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[4] IDC https://my.idc.com/getdoc.jsp?containerId=prMETA51823624#

[5] https://www.wired.com/story/hacking-spree-hits-uk-retail-giants/

## Technology capabilities in the region.

Successful digital initiatives need to be built on solid and future-proofed technologies. On this score the performance of the region's businesses looks mixed. Just under two-thirds (61%) of companies describe their cloud infrastructure as 'very mature', and a further third say it's 'mature' (*Figure 10*).

Figure 10: How would you rate the maturity of your organisation's current cloud infrastructure in supporting digital transformation initiatives?

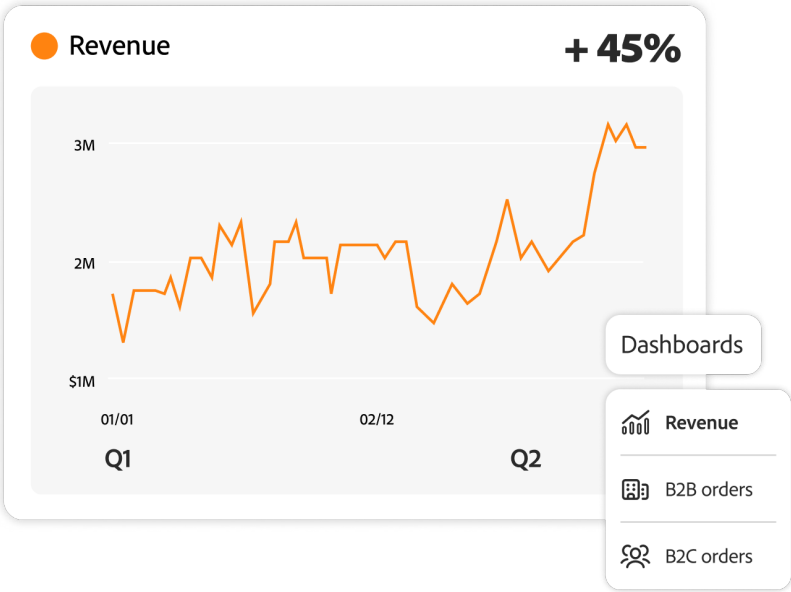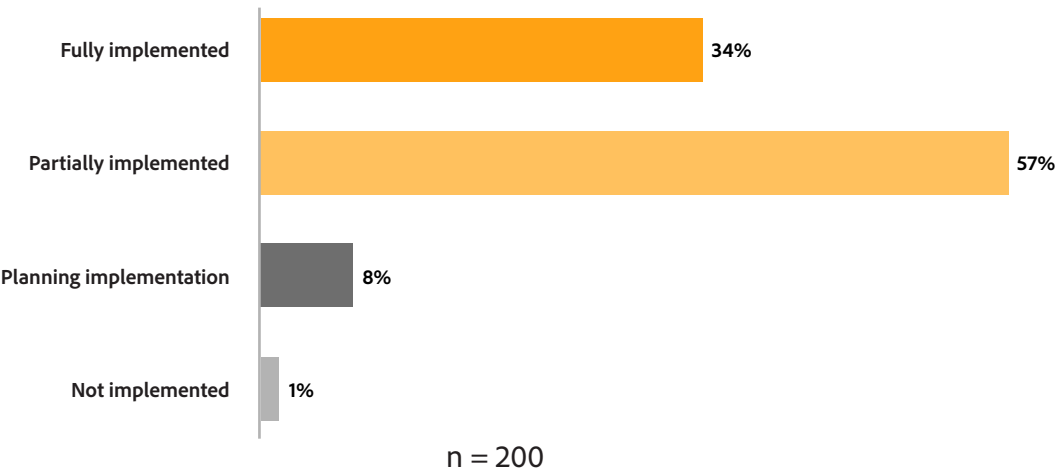|	
Very mature	61%
Mature	33%
Developing	5%
Immature	1%

n = 200
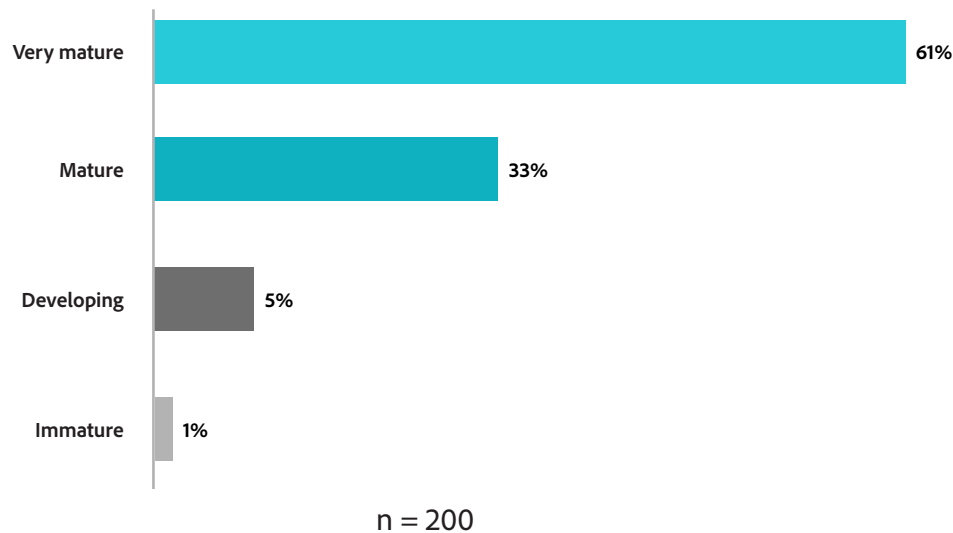
However, only 43% describe their organisation's current technology stack as 'very effective' at supporting their organisation's objectives (*Figure 11*). More than half (54%) say it's only 'moderately effective'.

Figure 11: How would you rate your organisation's current technology stack for supporting your organisation's objectives?

Very effective	43%
Moderately effective	54%
Not very effective	2%
Ineffective	1%

n = 200
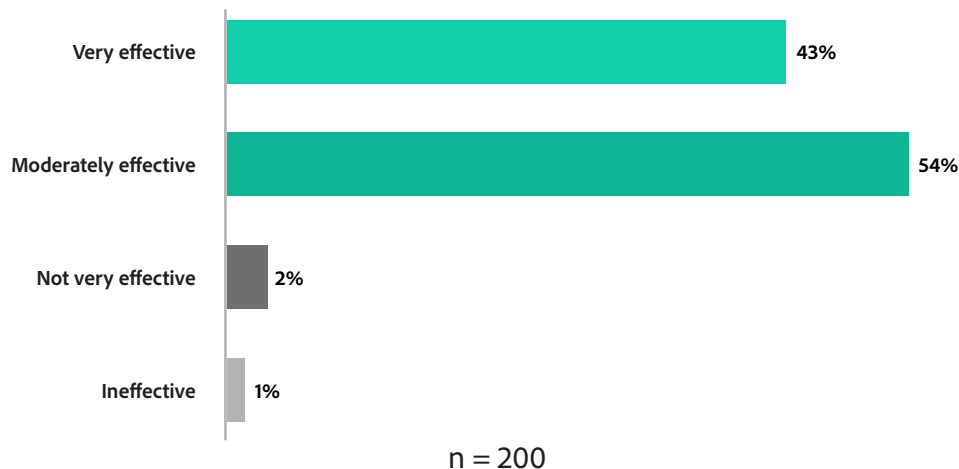
This situation is made worse by the fact that over half of respondents (57%) have only 'partially' implemented API-driven architectures (*Figure 12*). These enable seamless integration between disparate systems. Only a third (34%) say they have fully implemented such architecture.

Figure 12: To what extent has your organisation implemented API-driven architectures to enable seamless integration between disparate systems?

Category	Percentage
Fully implemented	34%
Partially implemented	57%
Planning implementation	8%
Not implemented	1%

n = 200

Revenue   + 45%

3M

2M

$1M

01/01   02/12

Q1   Q2

Dashboards

Revenue

B2B orders

B2C orders

Who's in charge here?

The mandate for a strategic focus on digital is clearly top-down, often championed by the CEO (or government minister). However, when it comes to day-to-day ownership and execution, the responsibility lies with the CTO or CIO (in 62% of businesses). In fewer than one in five companies does marketing (16%) or executive leadership (15%) drive digital initiatives (*Figure 13*). The use of cross-functional teams associated with Agile development methodologies is in its infancy (3% of respondents).

Figure 13: Which department primarily drives digital initiatives within your organisation?

Department	Percentage
IT / Technology	62%
Marketing	16%
Executive Leadership	15%
Cross-functional team	3%
Operations	3%
Others	1%

n = 200
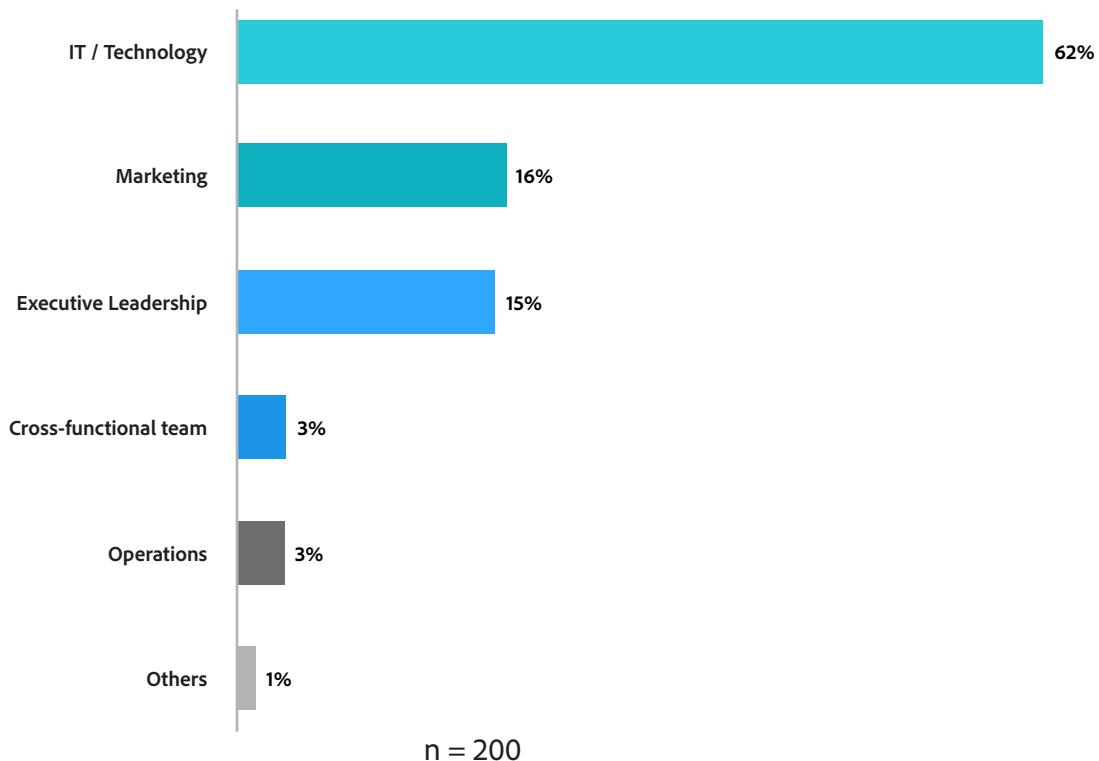
Interestingly, roles such as Chief Experience Officer or Chief Digital Officer are still largely divided along traditional IT and business lines and have yet to be clearly defined within companies in the region. Unlike in the US or Europe, where such positions are mainstream, they remain more of a topic of discussion in the Middle East.
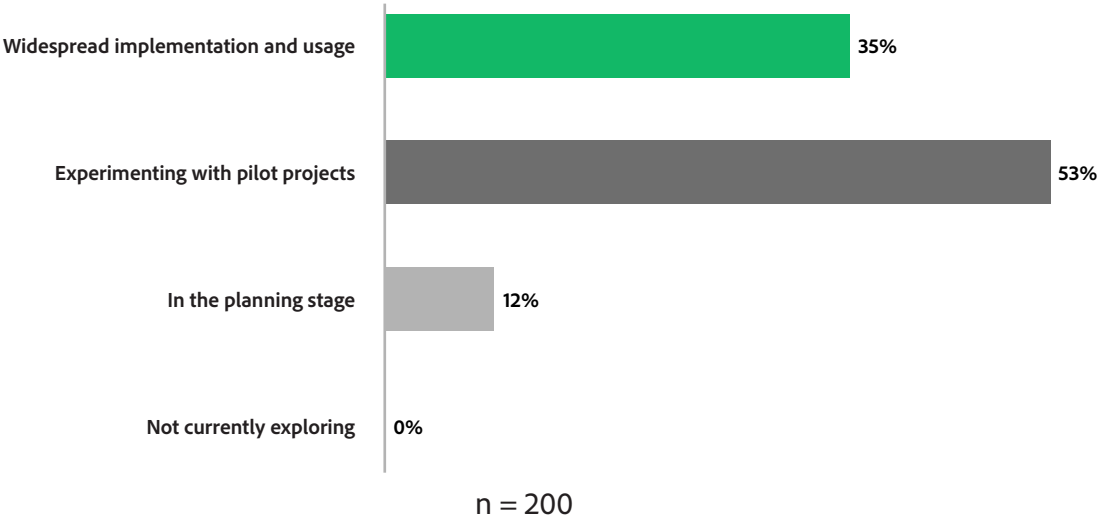
💡 Key takeaway

Despite challenges in security, personalisation, and system integration, businesses in the region are making solid progress, over 60% report mature or very mature cloud infrastructures. This strong technological foundation positions companies to overcome hurdles, accelerate digital transformation, and deliver seamless, secure, and personalised commerce experiences that drive growth and customer satisfaction.

Section 5: Seizing the GenAI opportunity

Section 2 showed that one-third of C-level respondents regard the ability to integrate AI into the business as the most important capability over the next five years. But we also saw that only 15% of all respondents ranked AI and machine learning as the most important technologies for business success. *Figure 14* helps to explain this apparent contradiction.

Figure 14: How is your organisation currently exploring or implementing Generative AI (GenAI) solutions?

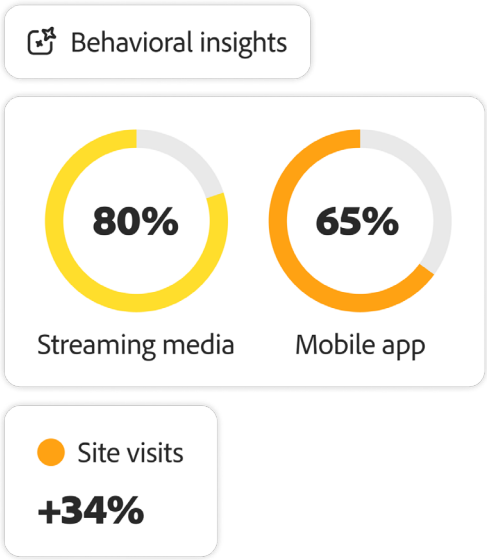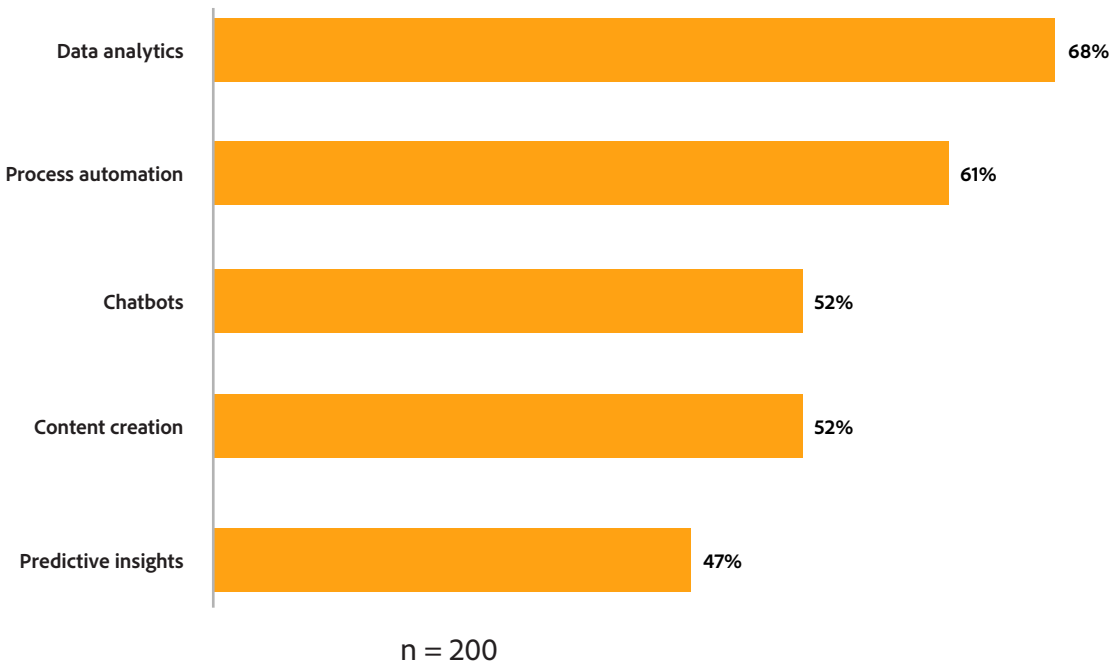| Category	Percentage
Widespread implementation and usage	35%
Experimenting with pilot projects	53%
In the planning stage	12%
Not currently exploring	0%

n = 200

This chart shows that most companies in the region are still in the experimentation phase with GenAI. Just over half of respondents (53%) describe themselves in these terms, while an additional 35% say they're making widespread use of the technology. No-one says they are not exploring it at all, a clear sign of its growing relevance in the region.

This also explains the gap between the C-level executive view of AI and lower-level senior management. The C-suite executives hold a more strategic and informed view of AI adoption, having visibility into enterprise-wide initiatives, pilot programmes, and long term plans. Other senior managers including department heads are less likely to know, unless the experiments are happening within their own business functions.
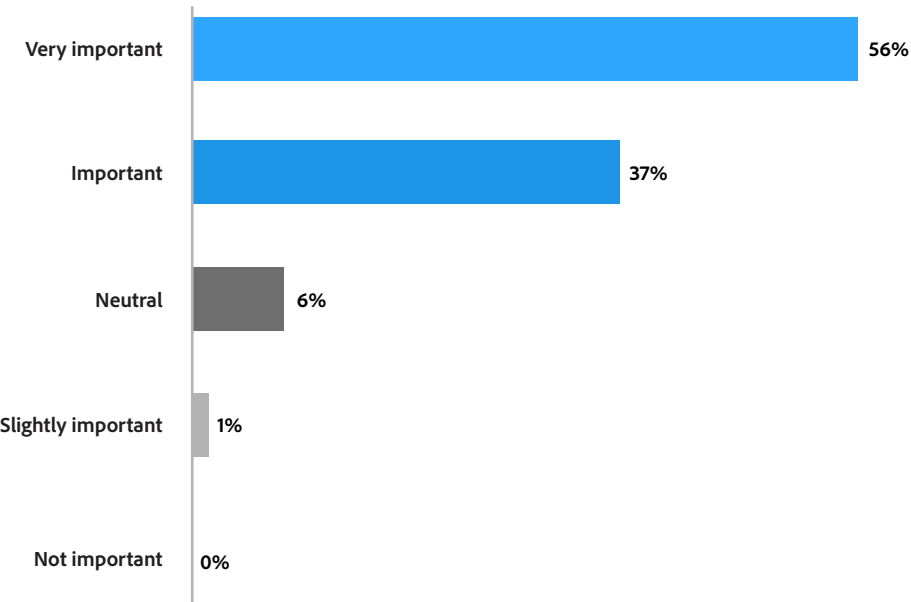
The most common GenAI use cases currently are for data analytics (68%) and process automation (61%). Its use in chatbots (52%), content creation (also 52%), and predictive insights (47%) is only slightly less common (*Figure 15*).

Figure 15: How is your organisation currently leveraging GenAI?

Use case	Percentage
Data analytics	68%
Process automation	61%
Chatbots	52%
Content creation	52%
Predictive insights	47%

n = 200

Behavioral insights

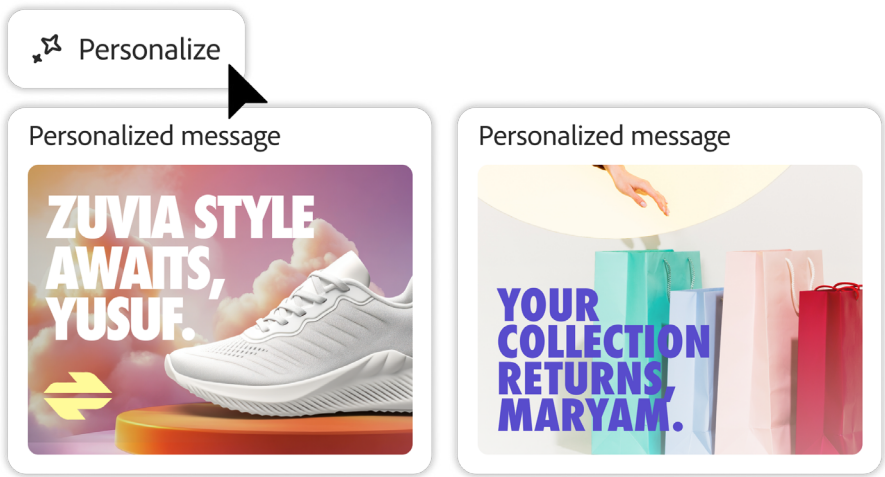80% Streaming media

65% Mobile app

● Site visits

+34%

AI is also seen as vital to future-proofing ecommerce capabilities (*Figure 16*). Almost all respondents (93%) see AI-powered personalisation as either 'important' or 'very important' for theirecommerce strategy.

Figure 16: How important is the integration of AI-powered personalisation in your organisation's ecommerce strategy?
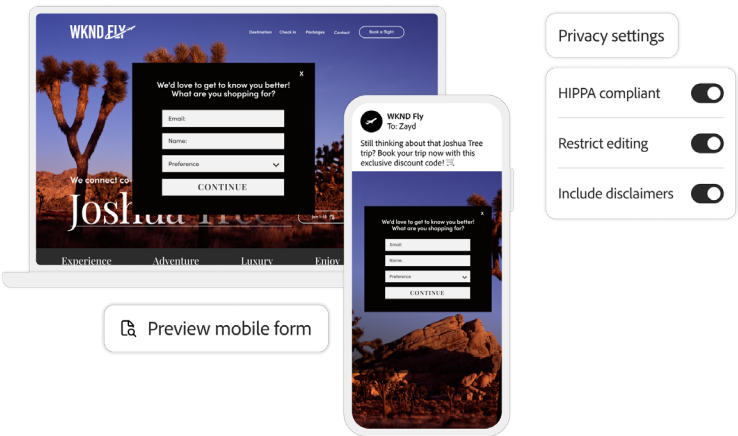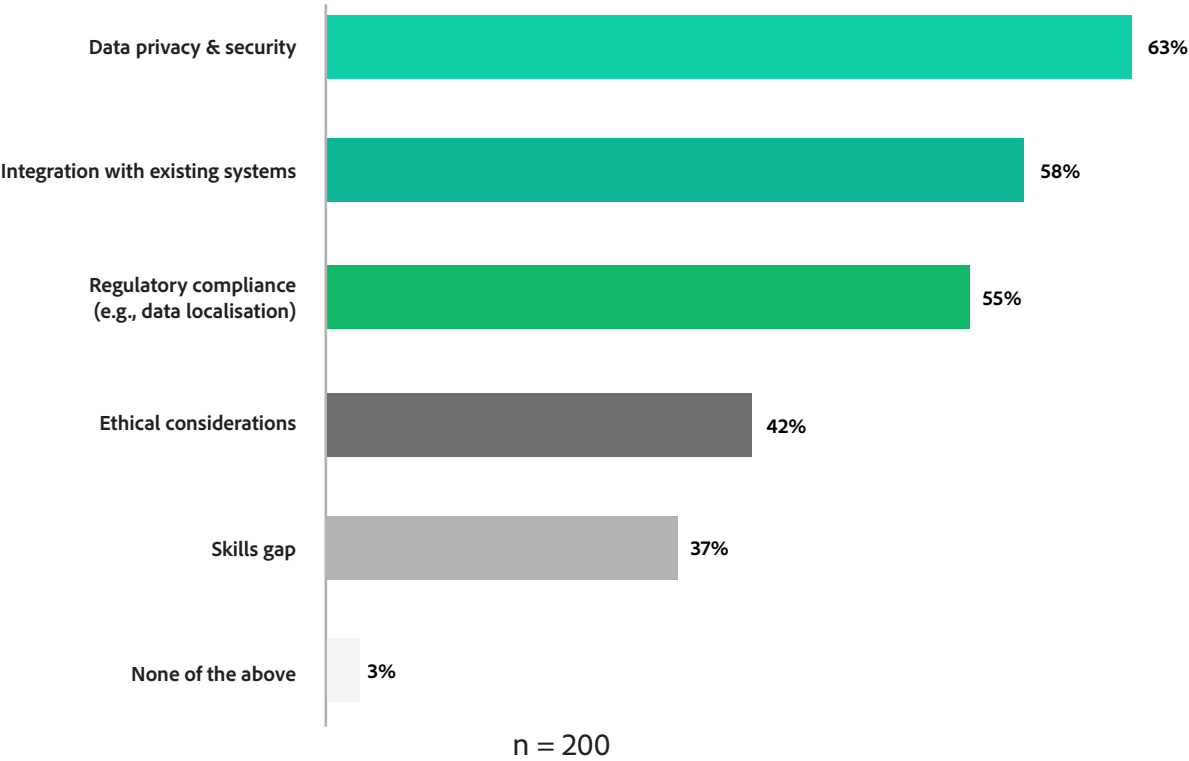
Category	Percentage
Very important	56%
Important	37%
Neutral	6%
Slightly important	1%
Not important	0%

n = 200

⬚ Personalize

Personalized message

ZUVIA STYLE AWAITS, YUSUF.

Personalized message

YOUR COLLECTION RETURNS, MARYAM.

Challenges around AI adoption.

Despite their enthusiasm for AI, companies in the region are also keenly aware of the challenges around its adoption (*Figure 17*). The top concerns include data privacy and security (63%), integration with existing systems (58%), and regulatory compliance (55%). These problems are all surmountable if companies invest in the right technology solutions from vendors who maintain transparent and responsible AI policies.

Figure 17: Which of the following are significant concerns regarding the implementation of GenAI within your organisation?

Data privacy & security	63%
Integration with existing systems	58%
Regulatory compliance (e.g., data localisation)	55%
Ethical considerations	42%
Skills gap	37%
None of the above	3%

n = 200

Case study: Riyadh Air turns to GenAI to deliver personalised travel experiences, globally.

Riyadh Air, Saudi Arabia's second flag-carrier airline, plans to begin operations in late 2025 and aims to use generative AI to provide seamless, highly personalised customer experiences.

Using Adobe technology, Riyadh Air will manage its first-party customer data and integrate it with data from partners to create a unified view, 360-degree view of each traveller.
These comprehensive unified profiles will enable the airline to derive real-time insights, allowing it to offer travellers in-the-moment communications via their preferred channels. Additionally, this data-driven approach will help marketing teams to identify which types of experiences and content will resonate best with the airline's diverse global customer base. Generative AI will then be employed to create the vast number of variations of on-brand content required to scale these personalised campaigns efficiently.

> " We're on a mission to shape the future of travel and meet guests' expectations of their travel experience," said **Adam Boukadida, Chief Financial Officer at Riyadh Air.** "Through our strategic partnership with Adobe, we will be able to create incredible, personalised experiences for our guests at every stage and every moment of their journey, from planning their trips towards booking and boarding their flight and towards the arrival destination across the world.

Riyadh Air's strategic partnership with Adobe resulted in unified profiles and real-time insights which facilitated seamless interactions throughout the customer journey.

💡 Key takeaway

More than half of businesses are actively exploring AI through pilot projects, signalling growing interest and commitment. While only a few currently see AI as their top priority, this presents a clear opportunity to bridge the gap between experimentation and real business impact. By sharing insights and scaling AI initiatives across teams, organisations can accelerate momentum, unlock new use cases, and fully realise AI's transformative potential.
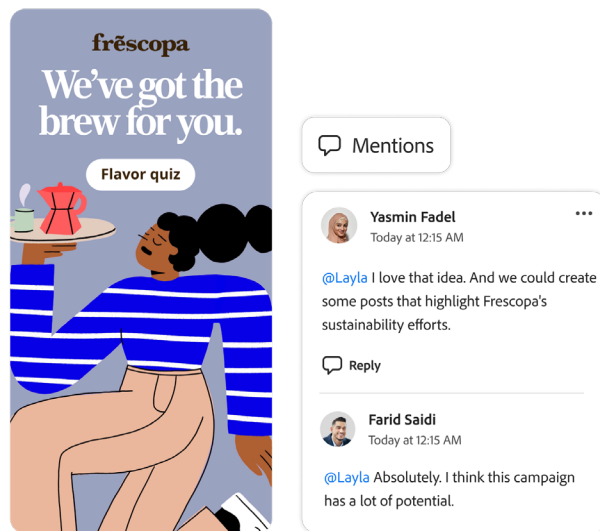
Section 6: Taming the content supply chain

In 2023, McKinsey & Company published a *Digital Sentiment Survey*[6] across three key Middle Eastern markets: Egypt, Saudi Arabia, and the UAE. It concluded: *"Over the past three years, consumers [in these countries] have increasingly migrated to digital channels, and this trend shows no signs of slowing."*

The report further noted: *"Overall, consumer use of digital services is poised to grow fastest in Egypt (an average of eight percentage points higher than in the previous six months across industries) compared with Saudi Arabia (three percentage points) and the United Arab Emirates (four percentage points)."*

Consumers in the region are already among the biggest internet users globally. According to data published by *Focus on Business*[7] (also in 2023), internet usage in Egypt was the 12th highest in the world. Consumers there spend 461 minutes online daily. The UAE ranked 14th on 449 minutes/day, and the Kingdom of Saudi Arabia was 16th on 440 minutes/day. To put those numbers in context, the global average was 397 minutes per day.

This consistently high — and growing — level of internet usage among consumers runs in parallel with a demand for high-quality user experiences. The McKinsey report quoted above also concludes that: "*Industries able to create a digital user experience that provides clear advantages over in-person interaction stand to increase digital adoption*." Increasingly, that means providing personalised experiences.
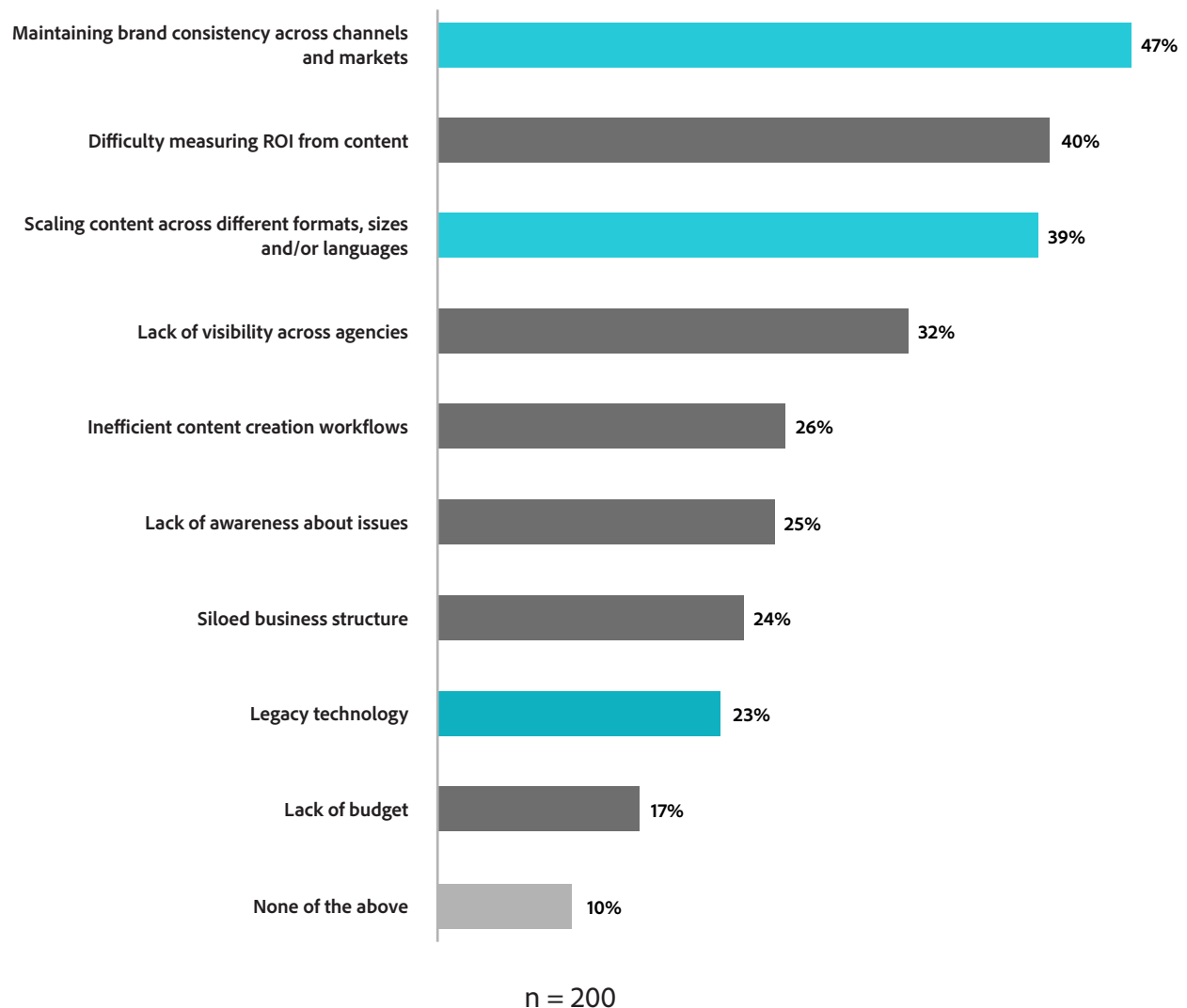
As a result, creative and marketing teams are under pressure to create ever more content across an array of digital and physical formats. At the same time, they must manage costs and optimise ROI. *Figure 18* shows the challenges they face in managing their content supply chains.

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[6] https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/digital-consumers-in-the-middle-east-rising-adoption-and-opportunity

[7] https://focusonbusiness.eu/en/technology/these-countries-spend-the-most-time-online/5335

Figure 18: What challenges does your organisation face in managing its content supply chain (CSC)?

Challenge	Percentage
Maintaining brand consistency across channels and markets	47%
Difficulty measuring ROI from content	40%
Scaling content across different formats, sizes and/or languages	39%
Lack of visibility across agencies	32%
Inefficient content creation workflows	26%
Lack of awareness about issues	25%
Siloed business structure	24%
Legacy technology	23%
Lack of budget	17%
None of the above	10%

n = 200

The biggest challenge for companies in this context is maintaining brand consistency across channels and markets (reported by 47% of respondents). This is a particularly significant issue in this region, where the requirements of different countries are highly varied and nuanced. The ability to scale content across different formats and languages is another major challenge (39%) for the same reason.

At the same time, fundamental management issues are still problematic for between a quarter and a half of businesses in the survey. These include difficulties in measuring ROI (40%), lack of visibility of what agencies are doing (32%), and inefficient workflows (26%). Other familiar problems also raise their heads again here. Siloed business structures (24%) and legacy technologies (23%) are both issues for around a quarter of our respondents.

This clearly creates a massive opportunity for any business that moves quickly to address these issues. At present, only 28% of respondents describe their content supply chains as 'very efficient' (*Figure 19*). What's more, only half are using AI extensively to automate and optimise content creation and delivery (*Figure 20*).

As Adobe's global experience shows, integrating AI early into content workflows accelerates both ROI and customer satisfaction. Adobe Workfront and Adobe Experience Manager can orchestrate and automate content production at scale, solving many of these challenges head-on.

💡 Key takeaway

Consumers in the region are among the world's most active internet users, driving high demand for personalised, multi-channel content. Yet many companies struggle with inefficient content supply chains and siloed workflows. With only 28% rating their content supply chains as very efficient and half using AI extensively, there's a clear opportunity to innovate. Early integration of AI tools can streamline production, automate workflows, and boost ROI while delivering seamless personalised customer experiences at scale.

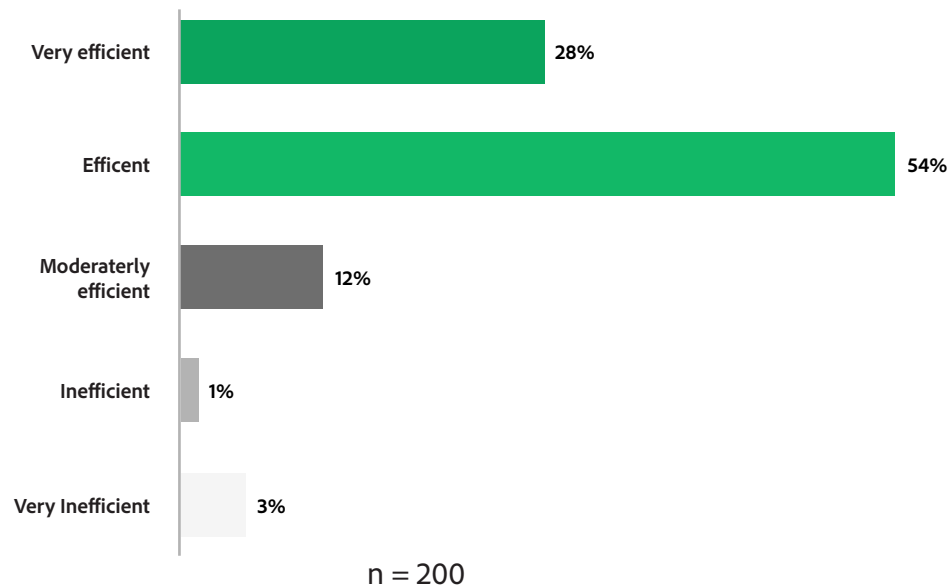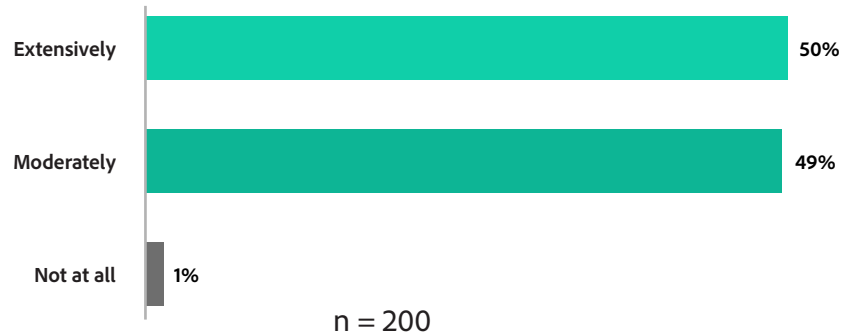**Figure 19: How would you rate the efficiency of your organisation's content supply chain?**

Very efficient	28%
Efficent	54%
Moderaterly efficient	12%
Inefficient	1%
Very Inefficient	3%

n = 200

Figure 20: To what extent is your organisation harnessing AI to automate and optimise content creation and delivery?

Extensively	50%
Moderately	49%
Not at all	1%

n = 200

How Adobe helps companies optimise the content supply chain

Adobe empowers organisations to craft personalised digital experiences for their customers, visitors, and citizens. We're here to help deepen relationships, unlock new opportunities, and drive remarkable growth.

Our comprehensive suite of enterprise solutions are built to deliver personalisation at scale through AI, real-time insights, and seamless content management. From content creation and customer journey orchestration to data-driven marketing and ecommerce, Adobe unifies tools across the digital experience lifecycle. With integrated workflows, intelligent automation, and actionable analytics, businesses can move faster, connect more meaningfully, and optimise every touchpoint. Whether scaling content or streamlining operations, Adobe for Business empowers teams to deliver standout experiences that drive loyalty, growth, and measurable impact.

Even though some organisations don't explicitly call it a content supply chain, every company has one. Adobe recognises that it's critical for content supply chains to run smoothly to break down silos and unify the workflows so companies and their agencies can plan, produce, manage, deliver, and measure content quickly. This helps boost efficiency and engagement with customers to get more value from technology investments.

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Profile

Khalid Bin Rashid

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in   Read: Travel insights

Q   Search: Best heritage tours

f   Joined Group: Visit Heritage

Workflow and planning.

This initial stage emphasises the need for a centralised work management solution to prioritise content requests, facilitate collaboration and review, and ensure alignment with business goals. Tools like intake dashboards help with transparency and quick sign-off. Metadata is captured early to keep content organised and visible, aiding resource planning for creative and web teams. The aim is to optimise processes and centralise content governance.

Content creation and production.

This stage focuses on efficient content creation using tools like generative AI to speed up production and brainstorm ideas. Real-time collaboration and a centralised review process are crucial for faster feedback, version control, and seamless handoffs. The goal is to enable teams to produce high-quality content quickly while adhering to brand guidelines.

Asset management.

Digital asset manager (DAM) integrated across the content supply chain is essential for easy asset findability, usage, updating, and repurposing. It streamlines distribution, automates tagging, and manages digital rights. Tracking user journeys within the DAM provides insights into asset usage and stakeholder interests. The objective is to maintain a central, accessible, and compliant asset repository.

Delivery and activation.

This stage involves using the DAM to catalogue, track, and locate assets for distribution across various digital channels. Automation in resizing, version control, and content variation based on customer data is key. A platform for distributing and optimising content for each channel is also important. The aim is to deliver personalised content efficiently across all relevant touchpoints.

Reporting and insights.

The final step involves measuring content performance through analytics and engagement metrics. Integrated tools provide granular insights into content and asset performance, allowing for continuous testing and optimisation. This data informs future content strategies and helps leadership make better decisions, ensuring consistency and cohesiveness.

💡 Key takeaways

Based on the findings of the research, we make six recommendations for businesses looking to capitalise on the digital opportunities in the region:

Ensure you're a 'digital-first' business.
Increasingly, the idea of digital transformation is being replaced by the concept of being 'digital-first'. This means thinking beyond the digitisation of processes. Instead, you should focus on being able to adapt quickly and positively to the coming waves of technological and social change. It means making sure your digital foundations are solid: integrated systems across the business, unified data as a single source of truth, and removal of operational silos. KPIs should ladder down from strategic business goals to individual teams.

Share responsibility for digital transformation around.
The IT department is the main driver of digital transformation in almost two-thirds (62%) of businesses surveyed; it is not solely a technology issue. IT plays a vital role in ensuring systems integration and seamless data sharing, but cross-functional collaboration is required for effective results. The most technologically sophisticated system is useless if it fails to meet user needs.

Prioritise measurement.
Two-thirds of respondents (64%) say ROI is one of the most important metrics for measuring digital success. Almost as many (59%) say their biggest challenge in delivering a high-quality customer experience is measuring its ROI. Accurate, credible measurement is essential not just for decision-making, but also for justifying investment in resources, restructuring, or replacing legacy technology.

Energise your entire business around AI.
Just over half the businesses (53%) are experimenting with AI pilot projects, but only 15% identify AI as the most critical technology for future success. This suggests a gap between the understanding of AI and its tangible business value. To close this gap, don't keep your experiments in silos; share learnings across teams in the entire organisation. Broader exposure will ensure momentum and surface new use cases and trial scenarios.

Turn customer experiences into your competitive edge.
This research confirms that success in this region depends on meeting the expectations of a young and tech-savvy population. Your customer experience needs to compete with the world's best— not just the best in your country, region, or sector. In turn, that means delivering consistent, coherent, personalised communications across the entire customer journey.

Optimise your content supply chain.
As personalisation increases, so does the demand for content. Scalable, AI-powered content is the only way to keep up. Half of respondents (50%) cite using AI 'extensively'. But 49% are only making moderate use of AI in the context of content creation and management. That means there's still a big opportunity to separate yourself from the mainstream, but swift action is needed.

About London Research

London Research produces insight-driven content for B2B professionals, helping them make better, more informed decisions. Our clients are typically market-leading international technology businesses and global agencies. We help them tell compelling stories based on robust research and insightful data points.

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