

The Ramadan Handbook

2023

Egypt Edition

GAME CHANGERS



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Study Background & Findings

Sample & Methodology



Note: throughout the report, results for the lower income group should be looked at with caution due to a small sample size



500 Respondents



Males & Females



15 years & Above



Nationwide Coverage



Online Interviews

The research was conducted in the last week of Ramadan 2022.

Summary Of Findings

Egyptians Make The Most Of Their Time During Ramadan

During Ramadan, People in Egypt focus on improving themselves and concentrating on things that matter the most. People's focus on spirituality is heightened and the same is true for positive health changes showing how reflection within becomes essential. In addition, people become more attentive to their community as they engage in helping those in need. Self improvement does not stop at that as many make the most of their time at home discovering new tips and tricks as well as learning new skills. Most importantly, people also spend more time with those closest to them; their family and friends.

Travel Is Still Relevant During Ramadan

In Ramadan, 1 in 2 people travel where this is more prevalent amongst affluent individuals. In fact, 1 in 5 of those who travel do so more often throughout the holy month. Moreover, exploration within the country is evident amongst the youth who are more likely to travel domestically. The relevance of travel goes beyond Ramadan as 3 in 10 make plans to travel within Egypt for Eid with the affluent group being more likely to make such plans.

Groceries Are The Most Purchased Category During Ramadan

The vast majority of people shop during Ramadan, with affluent Millennials being at the forefront. When it comes to purchased categories, food and groceries are the most popular throughout the holy month, followed by home items. Grocery shopping is carried out mainly through both online and offline channels, though in-store shopping is more common among the older generation and middle income group.

Food Delivery Is On The Rise During Ramadan

During Ramadan, 8 in 10 people order food through apps, with the upper income group ordering at a slightly greater rate. This leads to a rise in the use of food delivery applications, which are up 9% compared to other months. People also use grocery delivery apps more frequently during Ramadan, with a witnessed 16% upsurge in usage. Even though fast food is the most commonly ordered category, people during Ramadan do not limit themselves to one type of cuisine when ordering delivery. Yet, preferences do exist as the youth highly order fast food while the older generations are more inclined to order healthy meals and traditional food from home countries.

Summary Of Findings

Despite A Balance In Planning Nature, Some Exceptions Exist

Shopping behavior in Ramadan is generally split in terms of planning nature amongst Egyptians. However, the youth are more likely to shop impulsively. Moreover, significant differences in planning are still evident when it comes to certain purchased categories; Food & grocery and fashion purchases are more planned, whereas home items, travel, and gaming are highly impulsive purchases. Despite the overall balance, planning behavior is highly seen when it comes to big purchases, Ramadan wish lists and gifts people plan on giving for Eid.

People Expect Brands To Make Some Changes

People in Egypt follow a variety of content in Ramadan. Although holy content and festive content are generally the most favored. When it comes to specifics, females are more drawn to content related to home décor, recipes and fashion tips whereas those belonging to the upper income group are more likely to follow entertaining videos, product reviews and TV channel content. Despite the high and various content consumption, people in Egypt still expect brands to make changes in content especially when it comes to advertising. That said, affluent people are more likely to expect brands to showcase higher community engagement while the youth show a higher desire for changes in commerce.



General Behavior Changes

The Majority Of Egyptians Eagerly Anticipate Ramadan Because It Is Their Favorite Time Of The Year

82%

**Are Excited For
Ramadan**

84%

**State That Ramadan
Is Their Favorite
Month**



The Majority Engage In Community Service Through Providing Aid To Those In Need, Praying More Frequently, Watching More Religious Content, And Visiting The Mosque As Ways Of Expressing Their Faith



98%

Giveback To
People In Need



93%

Listen/Read To More
Quran & Religious Content



91%

Increase Frequency
Of Prayers



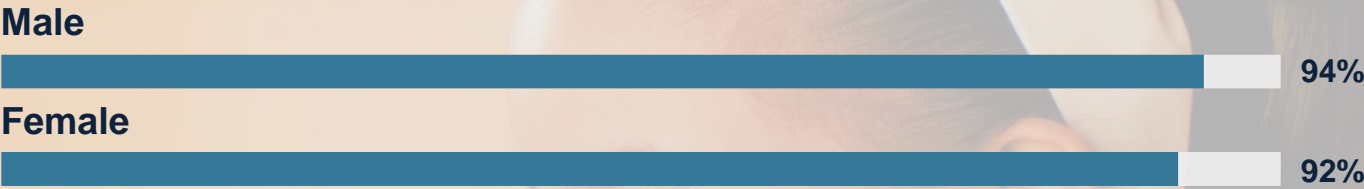
89%

Pray At The Mosque
More Than Usual

The Majority Of People Spend More Time With Friends And Family Throughout Ramadan, Making It A Special Time For Loved Ones

9 in 10
Spend More Time With Friends & Family

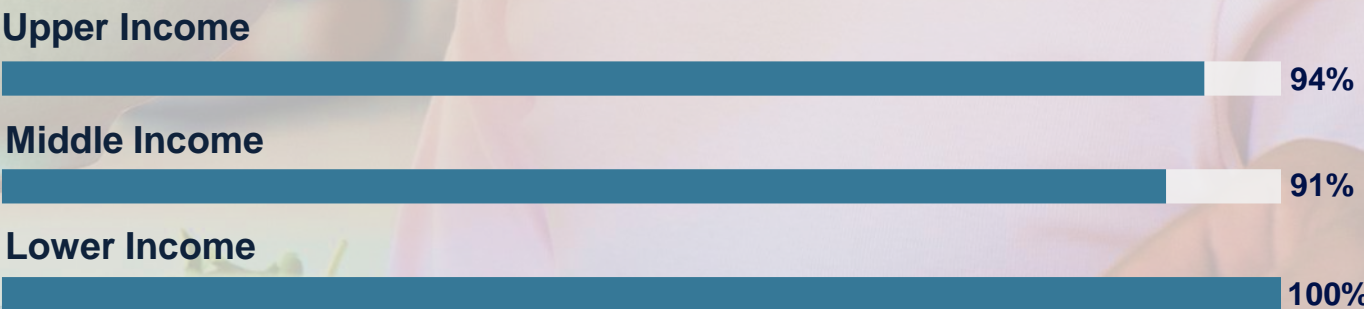
By Gender



By Generation



By Income Level

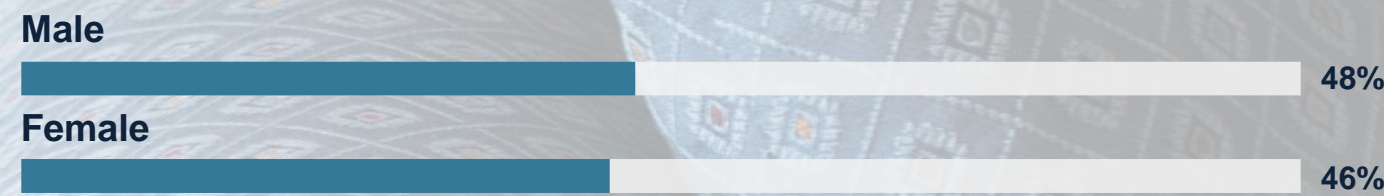


Around Half Of The People Are Staying At Home More As They Spend More Time With Their Loved Ones. This Is More Prevalent Among The Upper Income Group

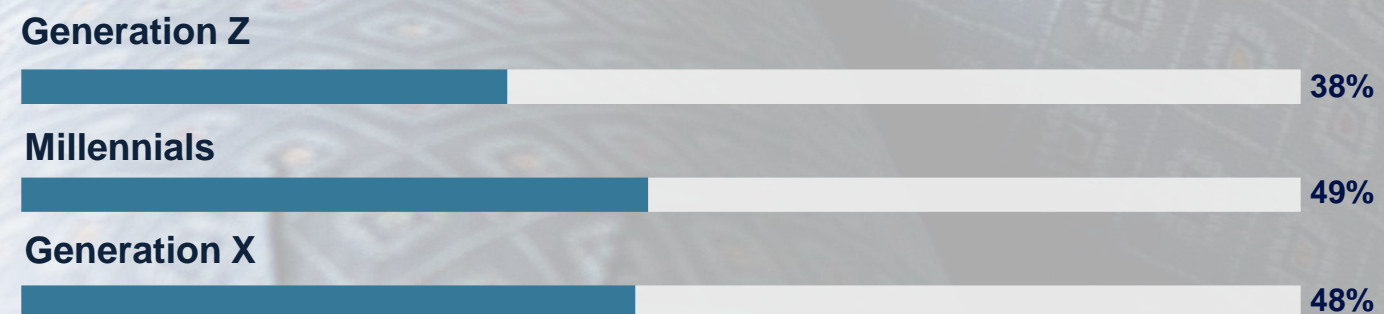
47%

Spend More Time At Home During Ramadan

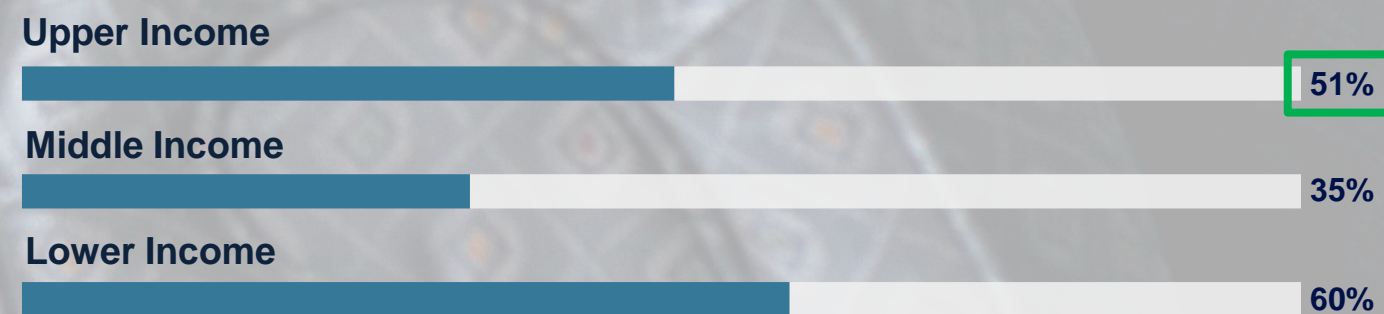
By Gender



By Generation



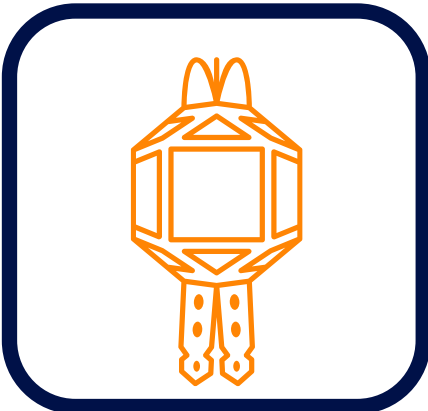
By Income Level



With More Time Spent At Home, It's No Surprise That People Are Highly Focused On Their Personal Spaces



Decorate Their Homes For Ramadan 92%



Shop for Ramadan Décor For Home 76%



Many People Take Advantage Of Their Time At Home, Where 7 Out Of 10 Learn New Tricks And Half Pick Up New Skills. The Former Is Common Among Affluent People Whereas The Latter Is More Prominent Among Young Males

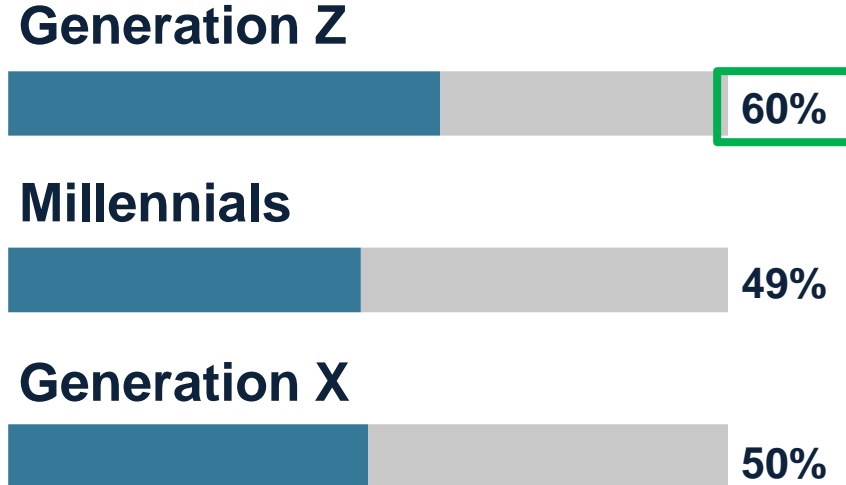
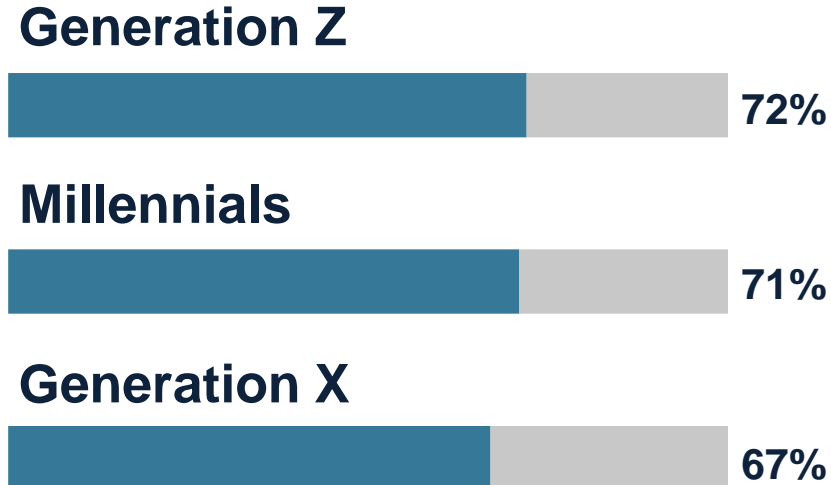
 **70%**
Discover New
Tips & Tricks

 **51%**
Learn New
Skills

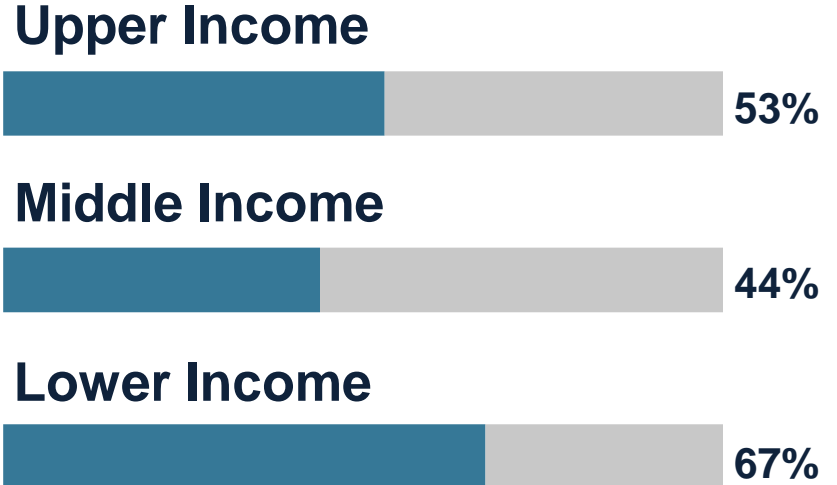
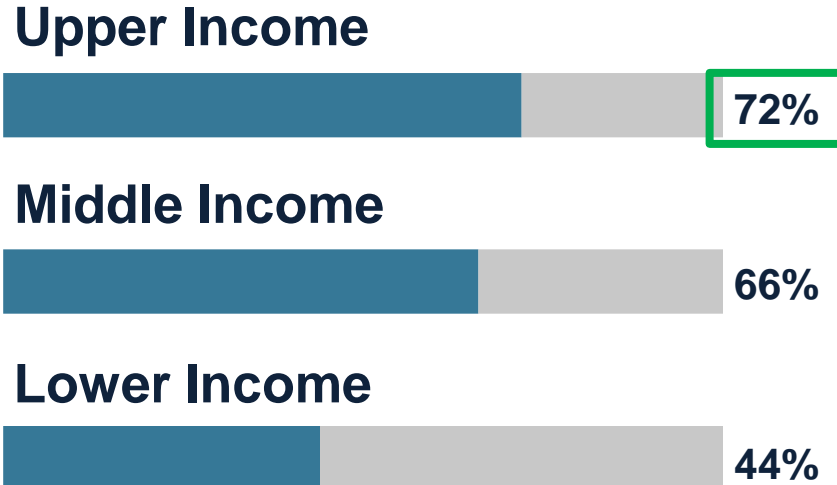
By Gender



By Generation



By Income Level



With More Time Spent Indoors, People Are Eating In More. Although This Is Less Common Amongst The Middle Income Class



47%

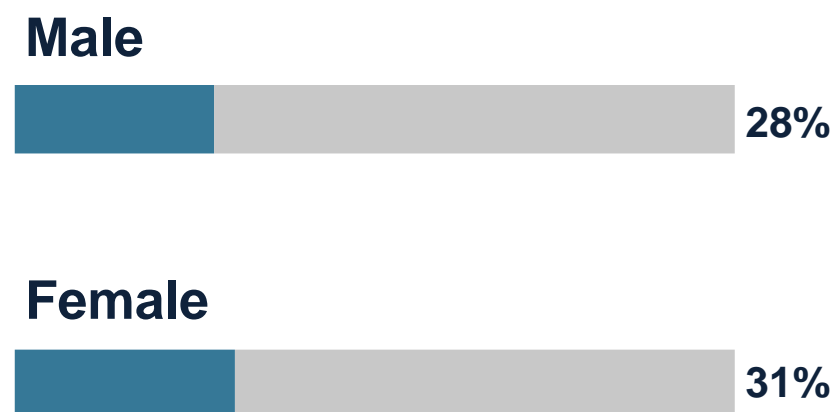
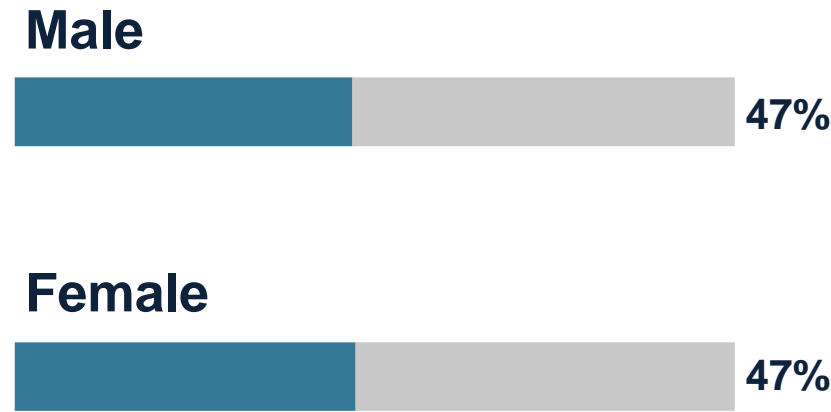
**Eat More At Home/
Indoor**



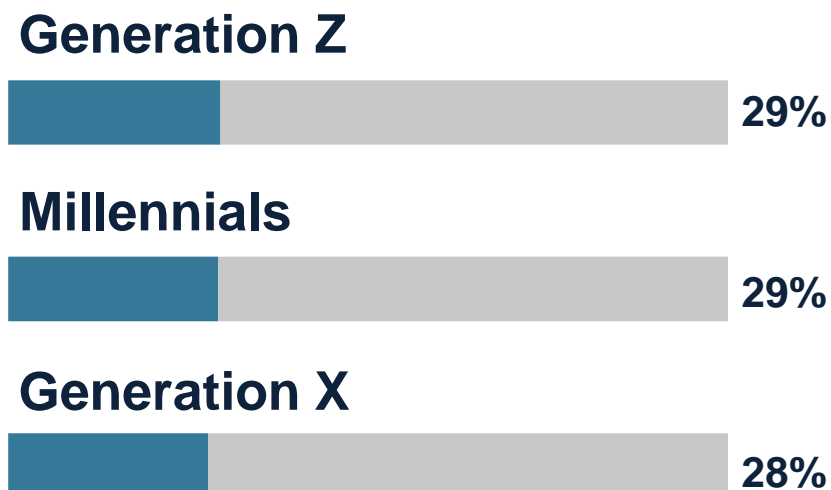
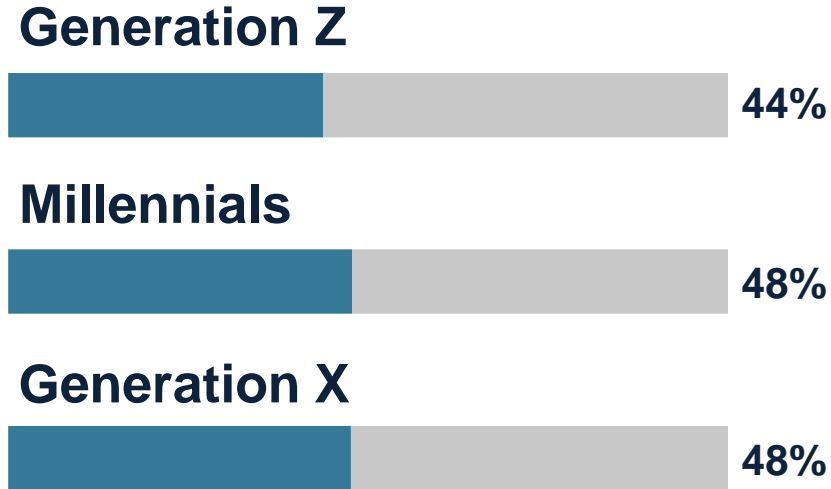
29%

**Eat More
Outdoor**

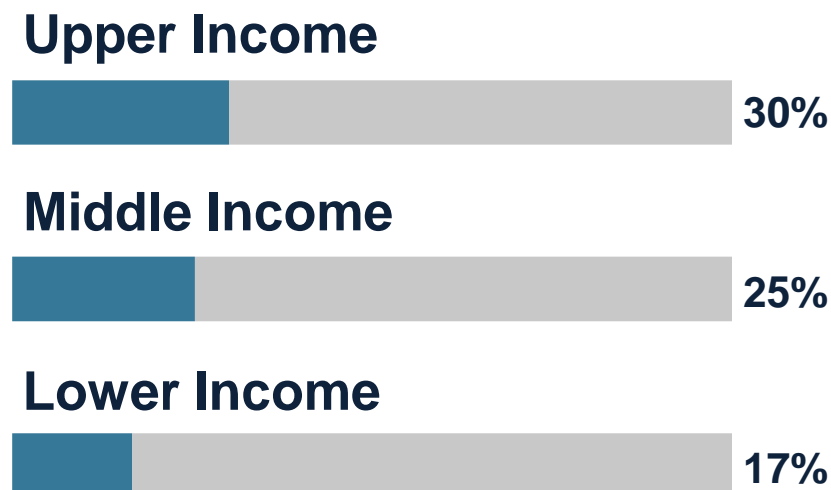
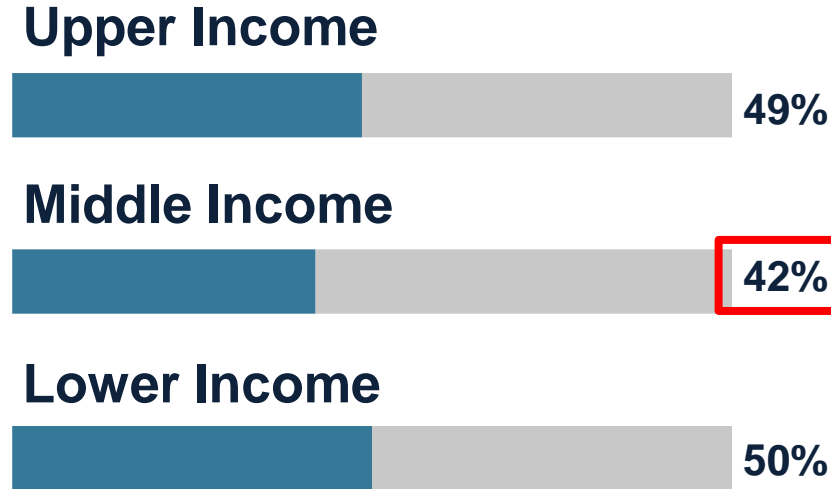
By Gender



By Generation



By Income Level



The Majority Also Reflect On Their Health And Make Changes In Pursuit Of A Healthier Lifestyle



**Change
Sleeping Habits** **95%**



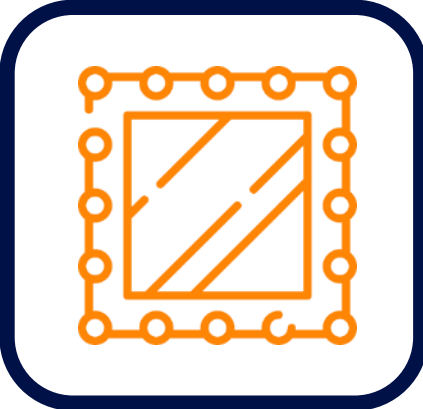
**Look Up Healthy
Food Recipes** **86%**



**Exercise
More** **71%**



The Time That People Have Throughout Ramadan Is Also Used For Some Self-care



**Spend More Time
In Beauty Centers 44%**



**Go More To
Wellness Centers 42%**

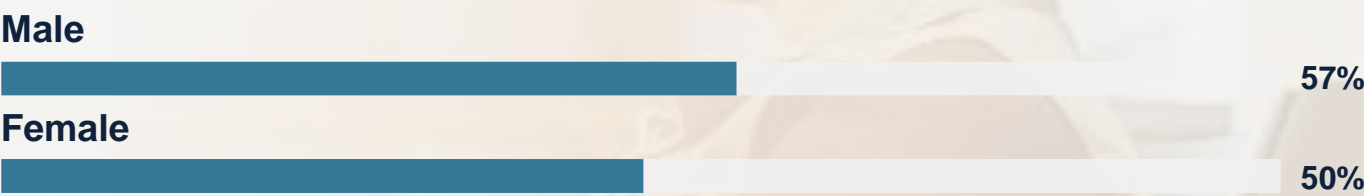


Around 1 in 2 Travel During Ramadan Where Affluent People Are More Likely To Do So

54%

Travel During Ramadan

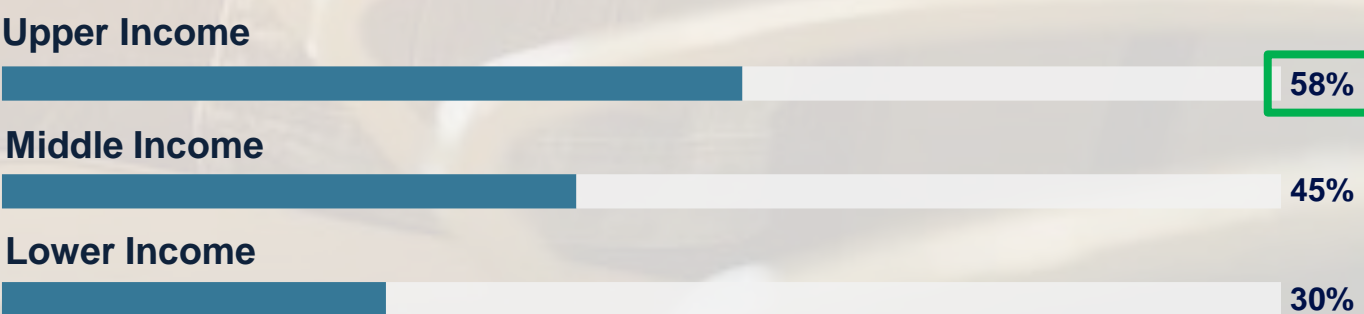
By Gender



By Generation

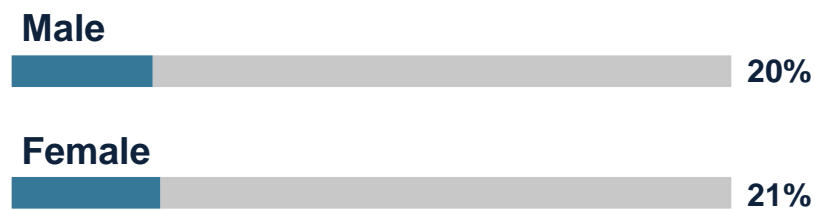


By Income Level

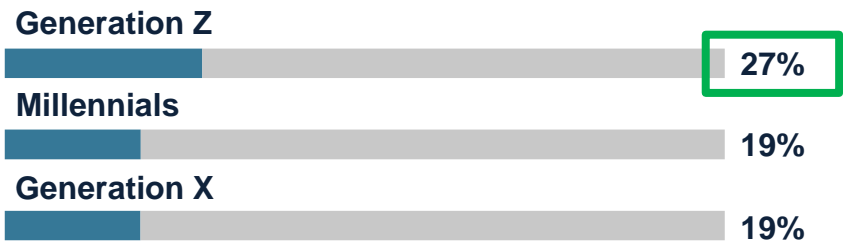


During The Holy Month, 1 In 5 Travel More Frequently Than Usual, With Youth More Likely To Travel Domestically And The Middle Income Class More Likely To Travel Internationally

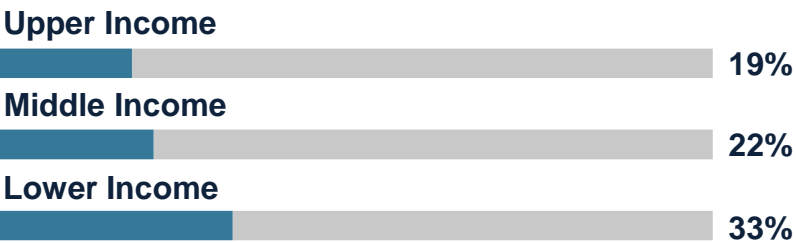
By Gender



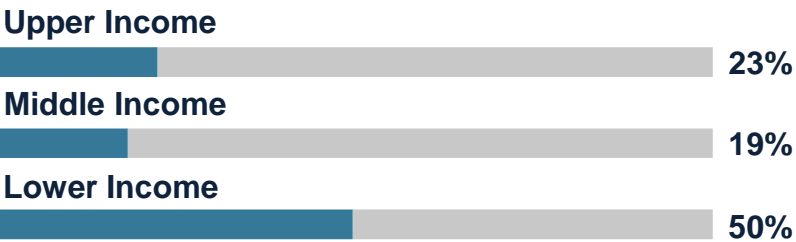
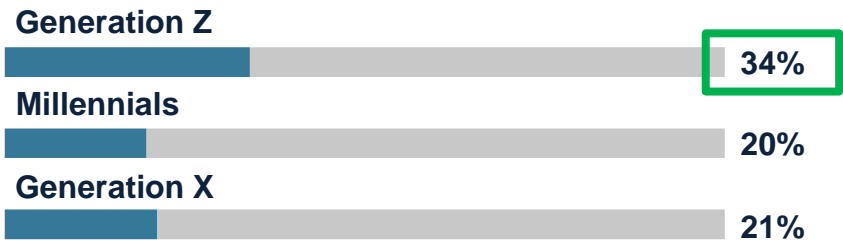
By Generation



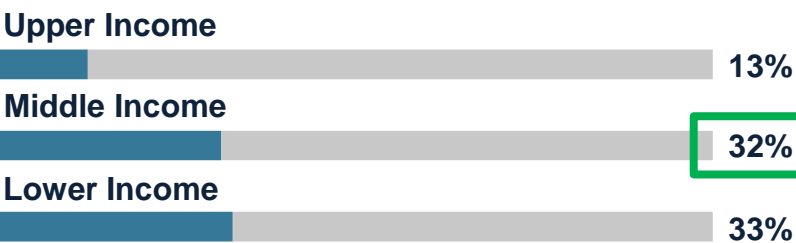
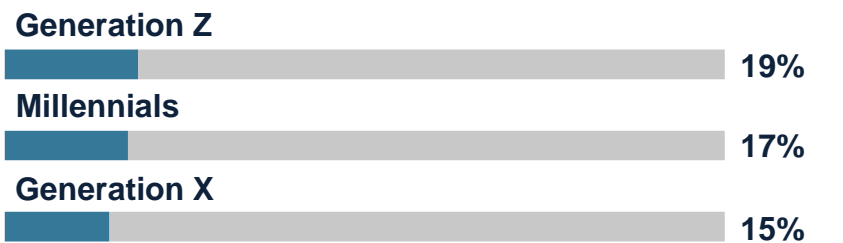
By Income Level



 **20%**
Travel More
During Ramadan



 **22%**
Travel More
Domestically



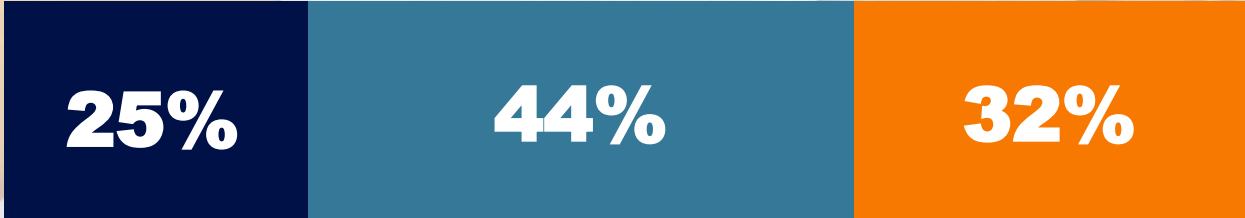
 **17%**
Travel More
Outside Egypt

Despite Some People Traveling More Often, Travel And Tourism Apps Witness A Decline In General Usage During Ramadan



Travel & Tourism App Usage

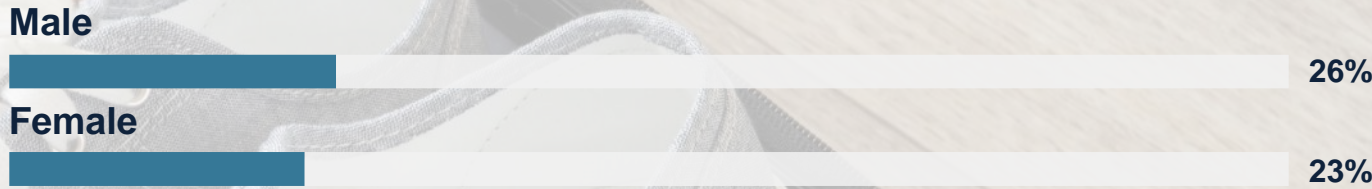
-7%



■ Increased ■ No Change ■ Decreased

By Gender

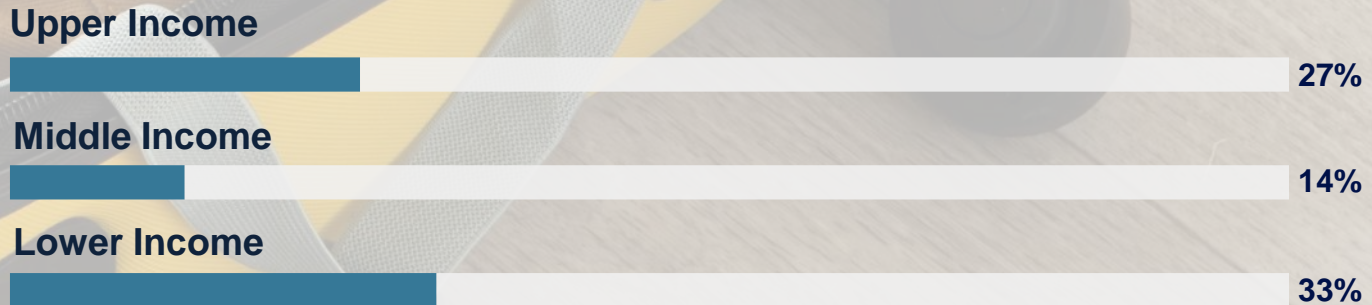
%Increased



By Generation



By Income Level



In Terms Of Eid Travel Plans, 3 In 10 Plan To Travel Domestically, Where This Is More Common Among The Upper Income Class

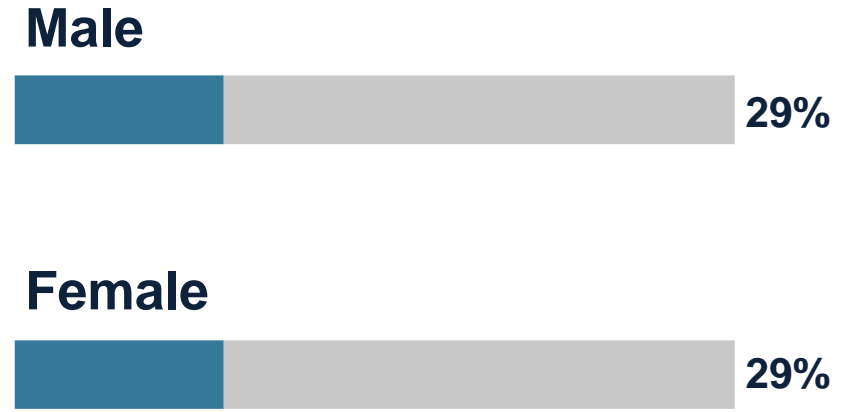


Plan To Travel Domestically During Eid

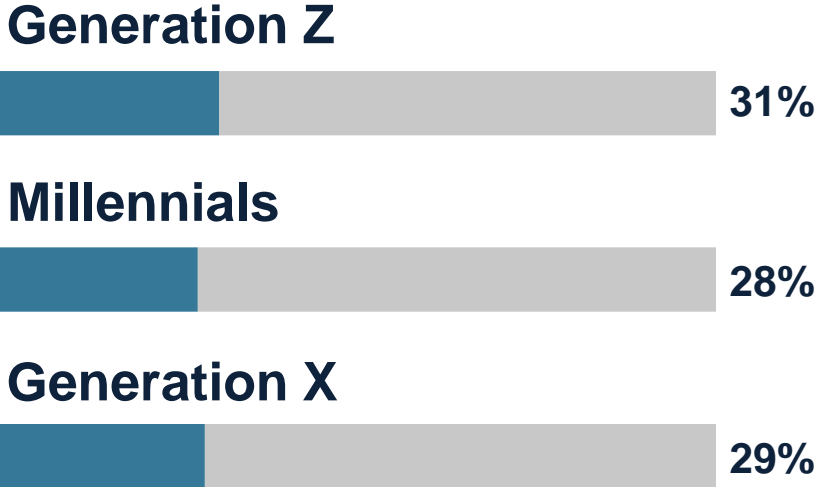


Plan To Travel Outside Egypt During Eid

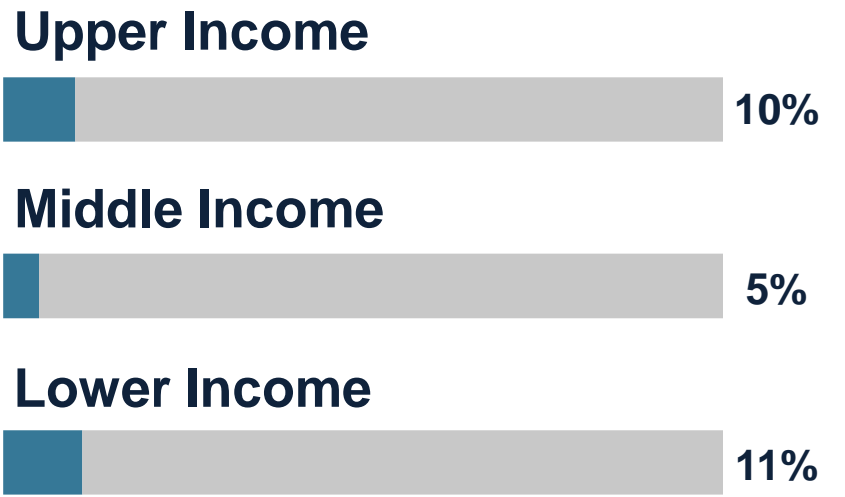
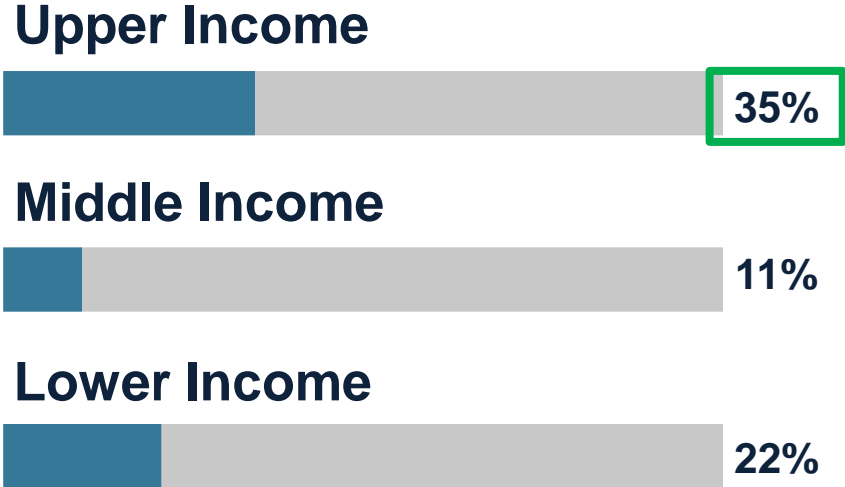
By Gender



By Generation



By Income Level



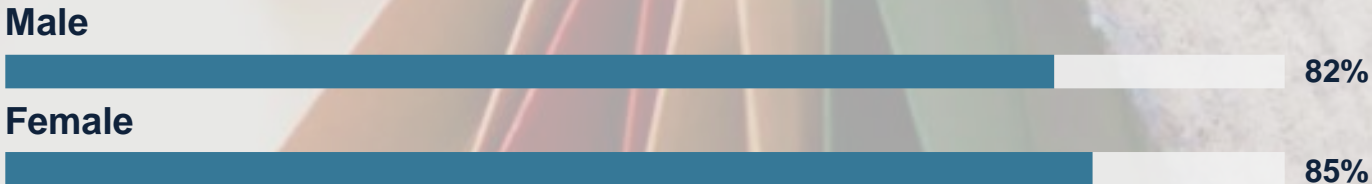
Shopping Habits



The Vast Majority Of People In Egypt Shop During Ramadan. However, This Is More Evident Among Affluent Millennials

8 in 10
Shop During Ramadan

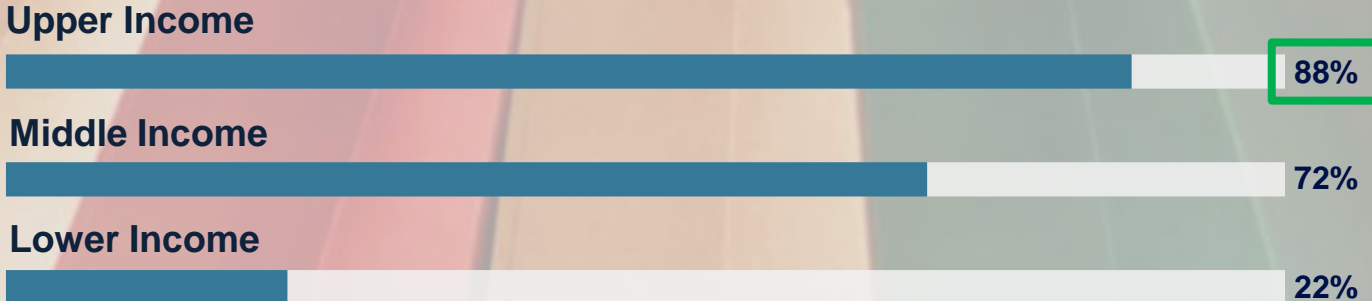
By Gender



By Generation



By Income Level



Promotions & Discounts Top The List Of Motivations For People To Shop During Ramadan Followed By The Needs That Arise From Hosting People Over

Motivations To Shop During Ramadan



27%

Attractive Promotions & Discounts



20%

To Host Guests for Iftar & Suhoor



12%

To Buy Home Improvement Products



11%

To Buy Gifts for Eid



8%

Wide Variety of Products



7%

Free Delivery & Installation



5%

Availability of Limited-Edition Products



5%

Easy Returns & Exchange Policy



3%

Easy Payment Options

The Need To Buy Home Improvement Products Highly Motivates The Older Generation And Middle Income Group To Shop Whereas Free Delivery Is More Likely To Encourage Gen Z

Motivations To Shop During Ramadan



Attractive Promotions & Discounts



To Host Guests for Iftar & Suhoor



To Buy Home Improvement Products



To Buy Gifts for Eid



Wide Variety of Products



Free Delivery & Installation



Availability of Limited-Edition Product



Easy Returns & Exchange Policy



Easy Payment Options

	Attractive Promotions & Discounts	To Host Guests for Iftar & Suhoor	To Buy Home Improvement Products	To Buy Gifts for Eid	Wide Variety of Products	Free Delivery & Installation	Availability of Limited-Edition Product	Easy Returns & Exchange Policy	Easy Payment Options
Total	27%	20%	12%	11%	8%	7%	5%	5%	3%
Male	29%	21%	11%	10%	8%	9%	4%	4%	4%
Female	25%	20%	14%	12%	9%	6%	6%	6%	2%
Generation Z	14%	22%	16%	12%	9%	12%	3%	9%	3%
Millennials	30%	22%	9%	13%	7%	6%	6%	4%	3%
Generation X	30%	17%	18%	5%	12%	9%	3%	4%	3%
Upper Income	28%	22%	11%	12%	9%	7%	3%	5%	3%
Middle Income	27%	16%	17%	9%	5%	9%	9%	5%	1%
Lower Income	-	-	25%	25%	25%	-	25%	-	-

People Buy A Variety Of Categories During Ramadan With Food & Groceries Being The Most Popular Category Purchased

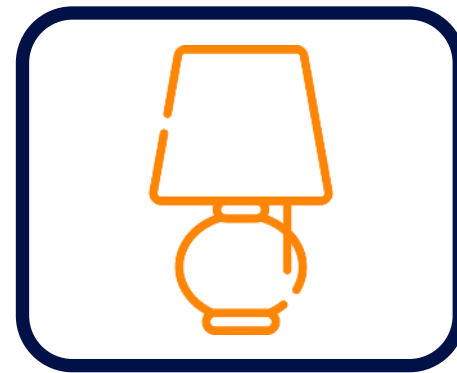


Categories Purchased During Ramadan



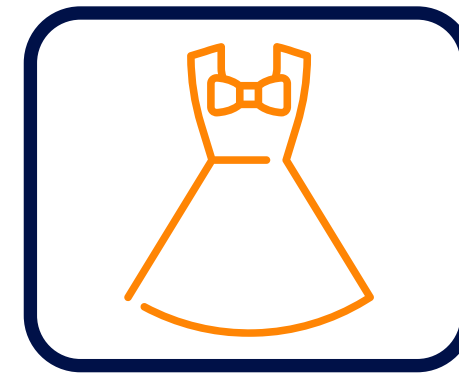
45%

Food & Groceries



35%

Home Items



31%

Fashion Items



30%

Electronics



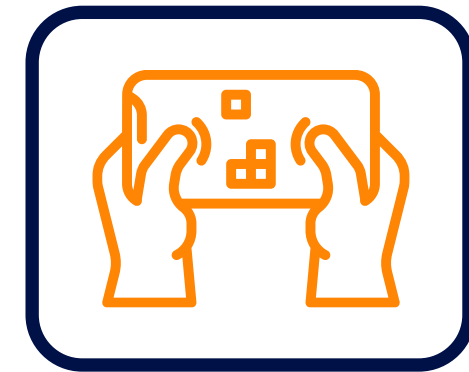
27%

Beauty Products



20%

Travel



11%

Gaming Products

Older Males Highly Purchase Food & Groceries While Females Are More Likely To Purchase Beauty Products. Gen X Highly Purchase Electronics, Travel And Gaming Related Products

Categories Purchased During Ramadan



Food & Groceries



Home Items



Fashion Items



Electronics



Beauty Products



Travel



Gaming Products

	Food & Groceries	Home Items	Fashion Items	Electronics	Beauty Products	Travel	Gaming Products
Total	45%	35%	31%	30%	27%	20%	11%
Male	50%	34%	32%	32%	20%	20%	11%
Female	39%	37%	30%	27%	36%	20%	11%
Generation Z	37%	33%	23%	37%	25%	27%	19%
Millennials	44%	35%	34%	28%	30%	20%	9%
Generation X	50%	39%	30%	30%	22%	19%	11%
Upper Income	42%	33%	28%	33%	29%	23%	13%
Middle Income	55%	44%	43%	17%	24%	12%	6%
Lower Income	-	-	-	100%	-	100%	-

1 In 2 Utilize Both Online And Offline Channels To Purchase Groceries, Especially Affluent People. In-store Grocery Shopping Is More Popular Amongst The Older Generation Of The Middle Income Group



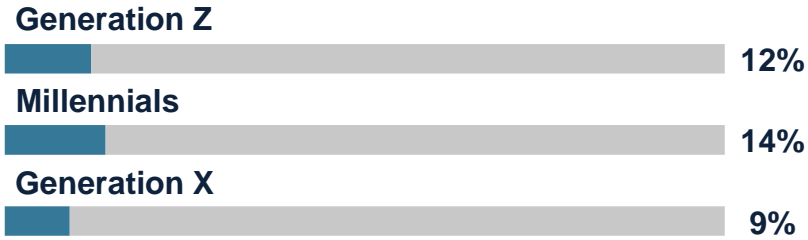
12%

Buy Groceries Online During Ramadan

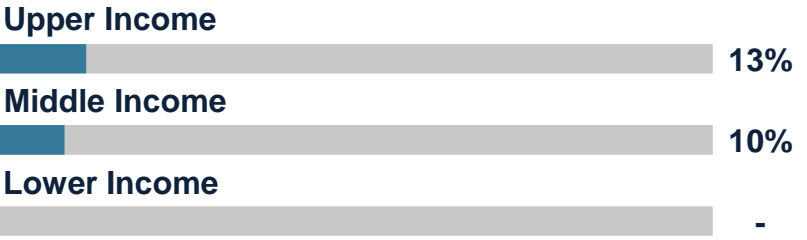
By Gender



By Generation

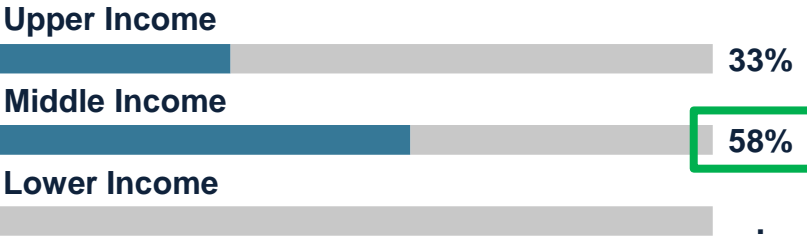
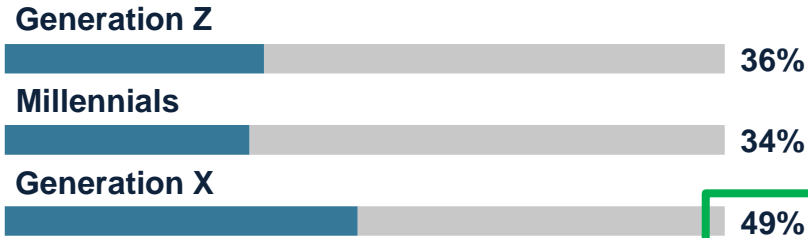


By Income Level



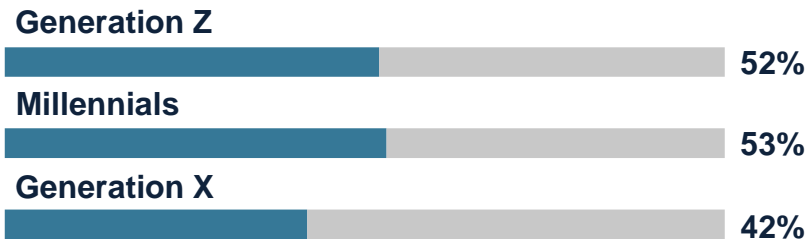
38%

Buy Groceries In-Store During Ramadan



50%

Buy Groceries Online & In-Store During Ramadan



During Ramadan, General Shopping Apps And Grocery Apps Witnessed An Increase In Their Usage



Shopping App Usage During Ramadan



Online Grocery Store App Usage

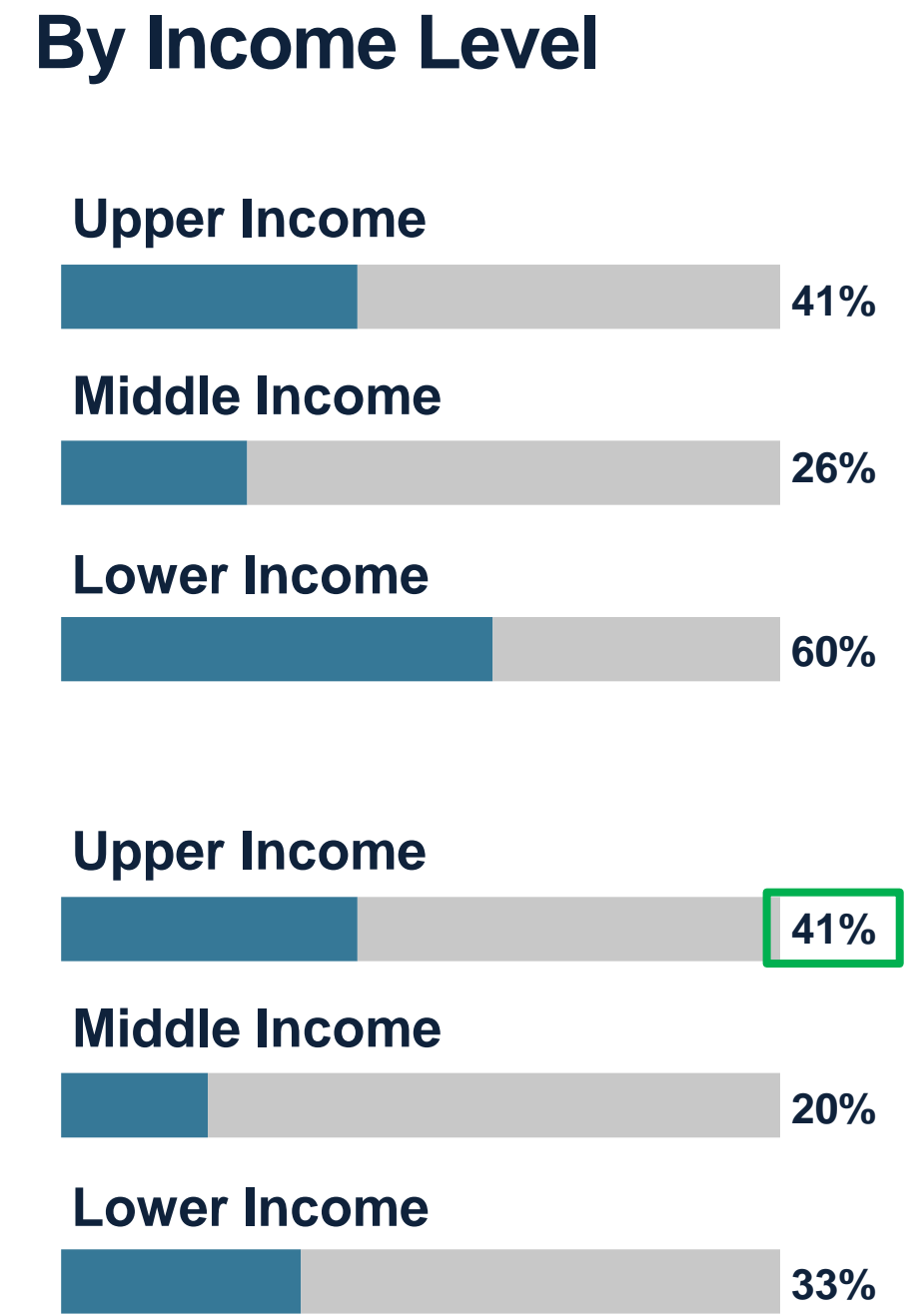
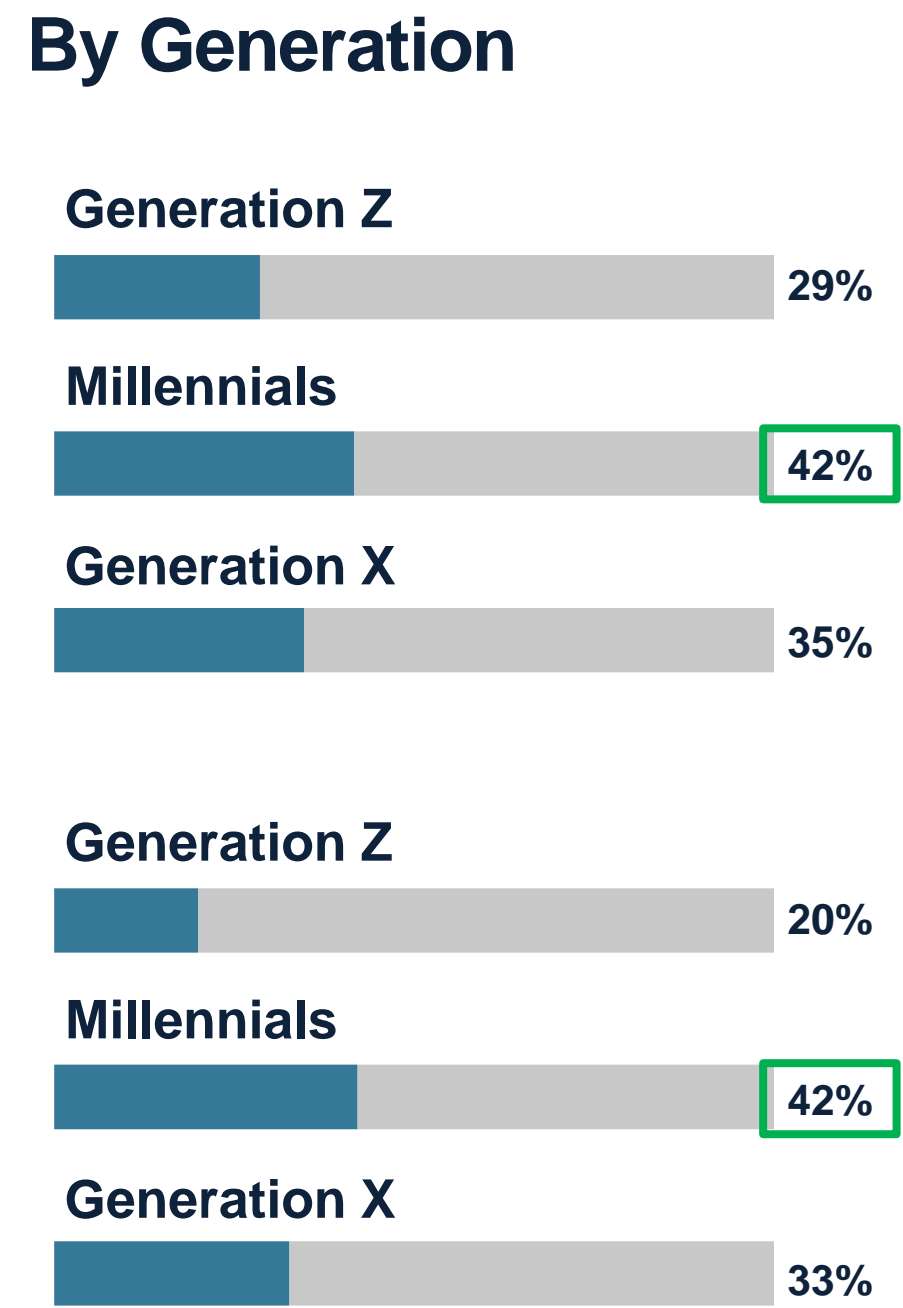
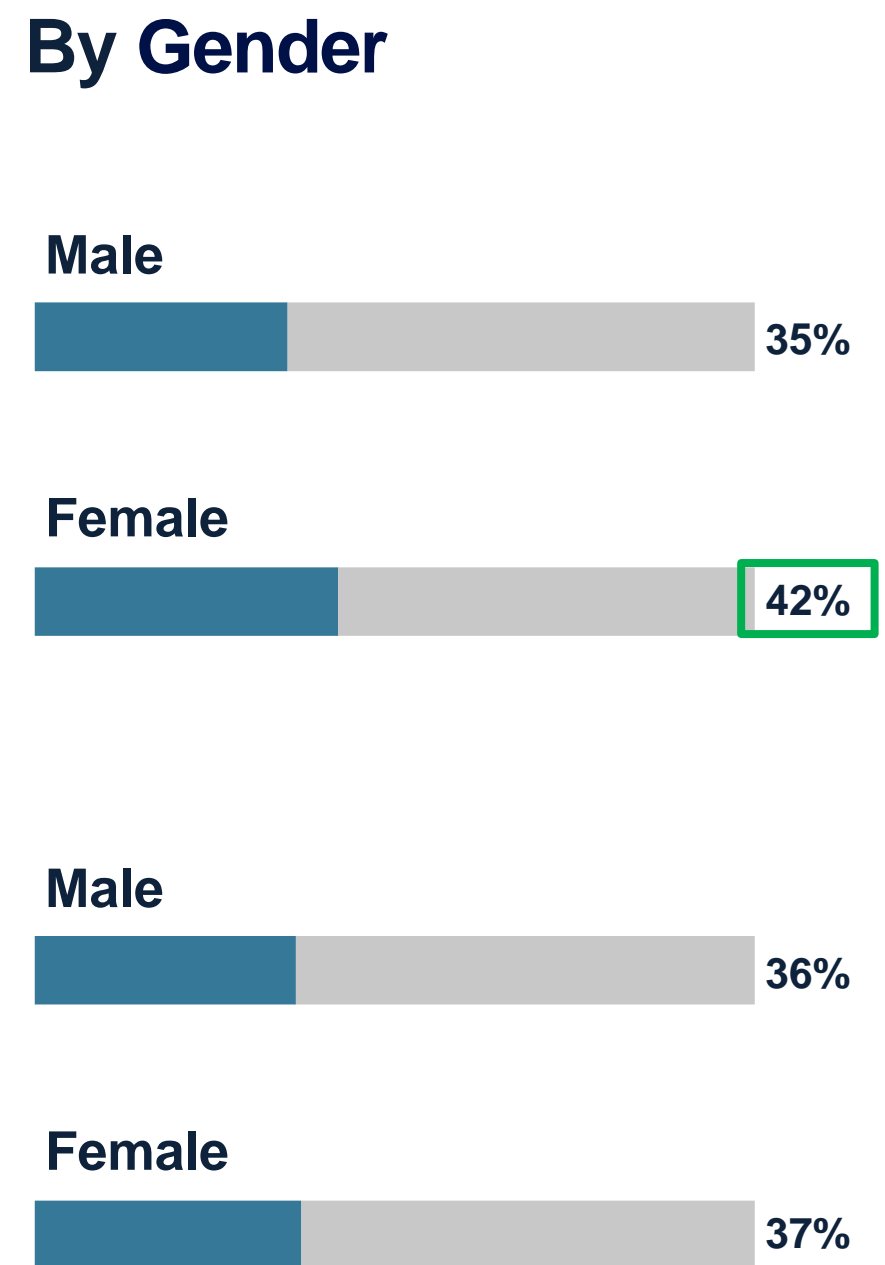


Online Shopping App Usage



■ Increased ■ No Change ■ Decreased

Those With Increased Usage For Such Apps In Ramadan Are More Likely To Be Millennials. Moreover, Females Are Evidently Highly Using Grocery Store Apps While The Upper Income Class Are Highly Using General Online Shopping Apps



People Mostly Learn About The Categories They Shop For On Social Media Followed By Word Of Mouth

Sources Of Awareness For Categories Purchased During Ramadan



70%

Social Media



53%

Friend/Family
Recommendation



49%

E-Commerce
Websites/Apps



47%

Online
Search Engines



43%

TV Advertisement



40%

In Store Ads



39%

Brand's Website



38%

Internet Advertisement



36%

Ramadan Post by an
Influencer













33%

Video Streaming
Websites Or Apps

Gen X Highly Learn About The Categories They Shop For From Online Search Engines And Brand Websites While The Youth Tend To Learn Through TV Ads And In-store Ads

Sources Of Awareness For Categories Purchased During Ramadan

	 Social Media	 Friend/Family Recommendation	 E-Commerce Websites/Apps	 Online Search Engines	 TV Advertisement	 In Store Ads	 Brand's Website	 Internet Advertisement	 Ramadan Post by an Influencer	 Video Streaming Websites Or Apps
Total	70%	53%	49%	47%	43%	40%	39%	38%	36%	33%
Male	68%	51%	47%	46%	40%	38%	39%	42%	34%	36%
Female	72%	56%	51%	49%	47%	44%	39%	34%	39%	30%
Generation Z	66%	56%	42%	47%	59%	51%	36%	36%	39%	34%
Millennials	71%	52%	52%	45%	41%	39%	38%	38%	38%	33%
Generation X	70%	55%	44%	54%	39%	37%	46%	39%	30%	34%
Upper Income	72%	54%	53%	50%	45%	40%	41%	41%	38%	35%
Middle Income	62%	48%	33%	37%	36%	43%	33%	28%	28%	25%
Lower Income	50%	50%	50%	100%	50%	-	50%	50%	50%	50%

In Ramadan, Shopping Behavior Is Generally Split In Terms Of Planning Nature. Yet, The Youth Are More Likely To Shop Impulsively



51%

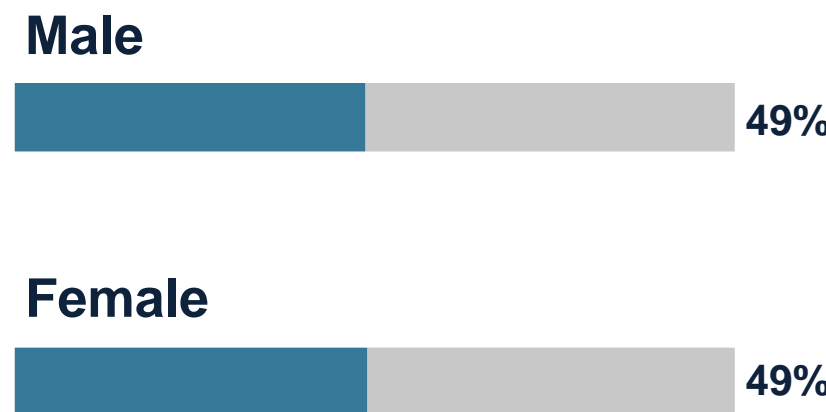
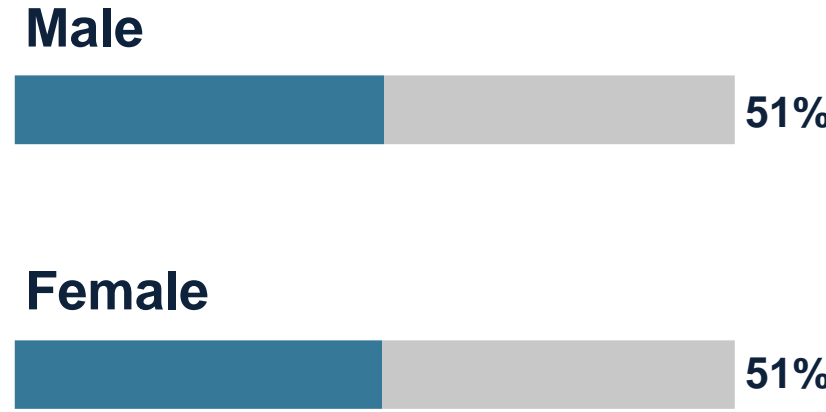
Make Planned Purchases



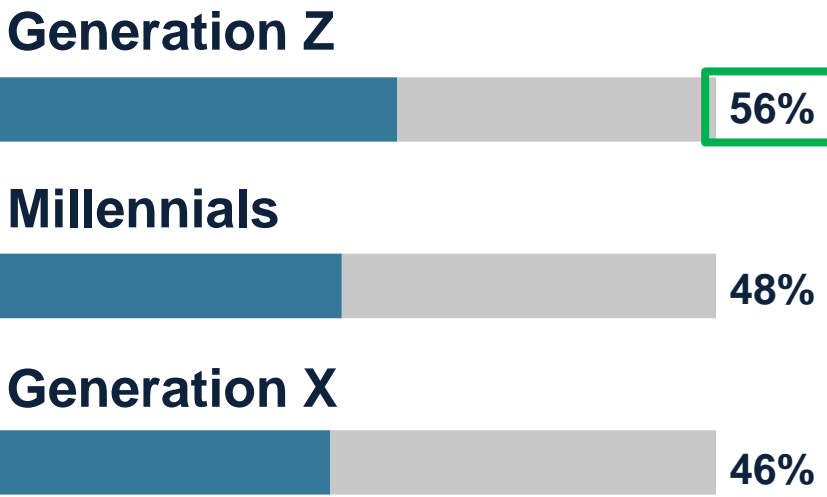
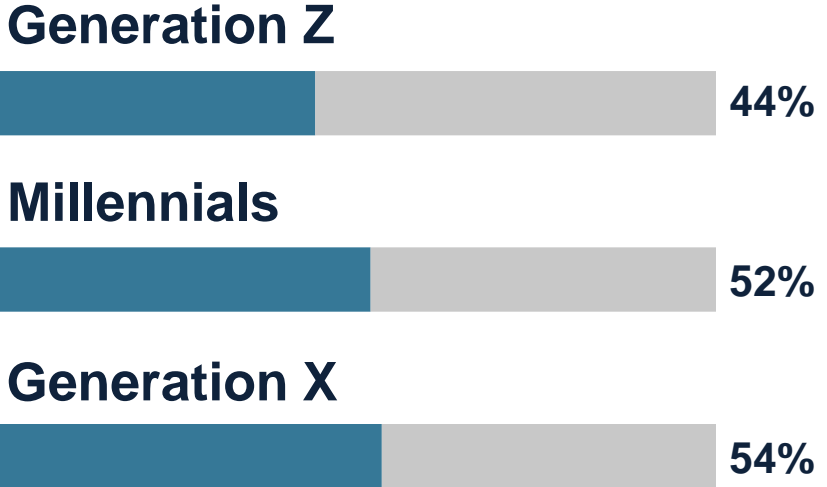
49%

Make Unplanned Purchases

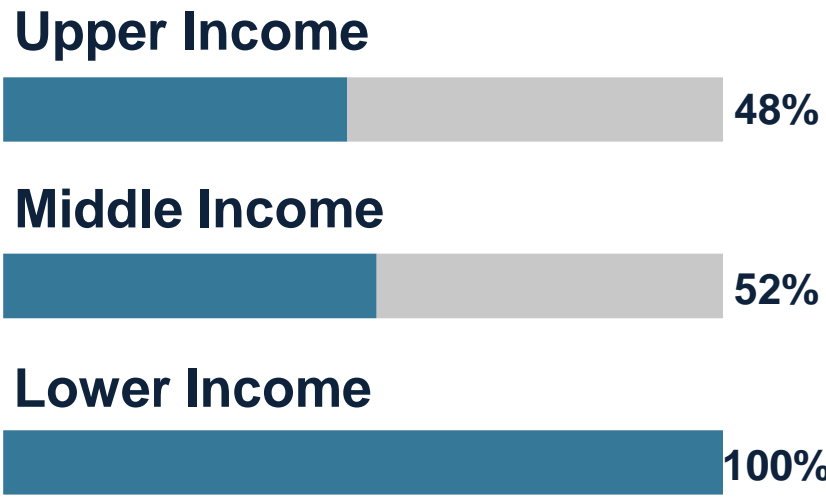
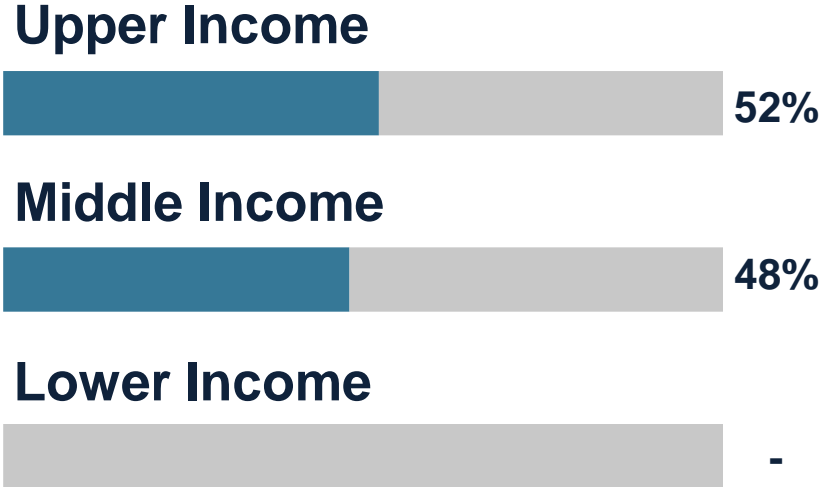
By Gender



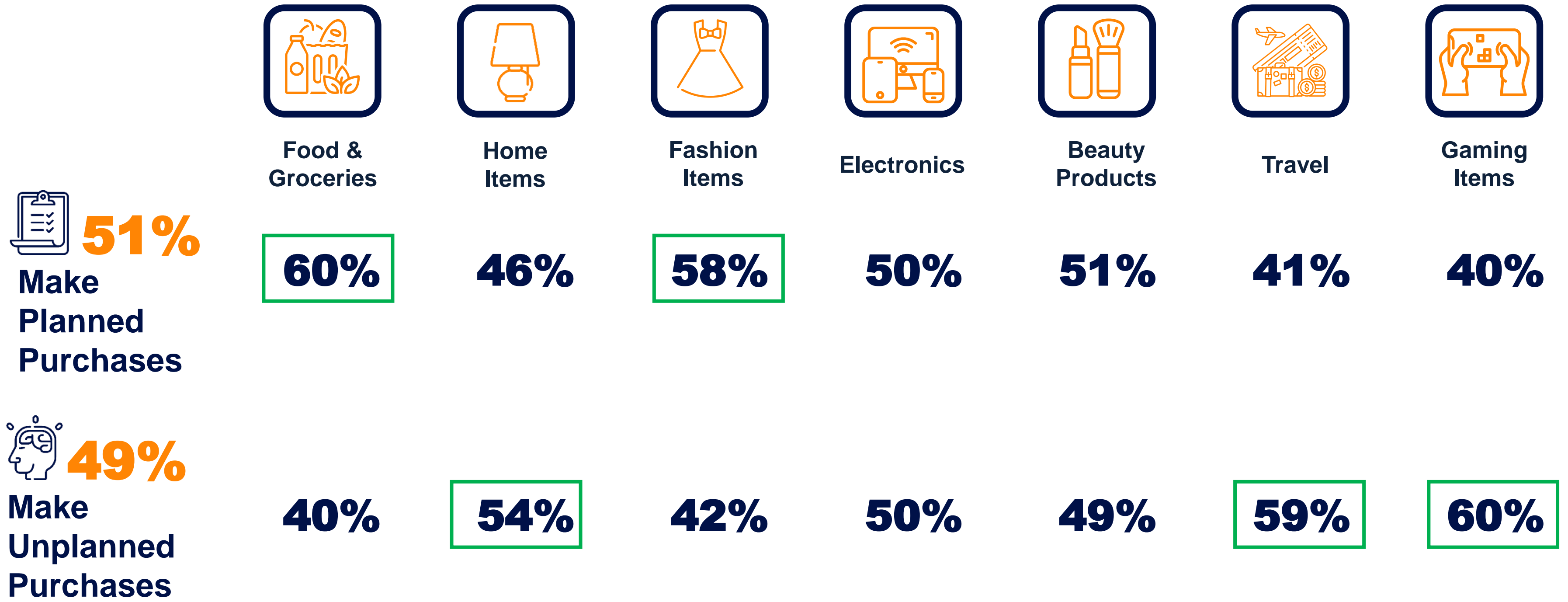
By Generation



By Income Level

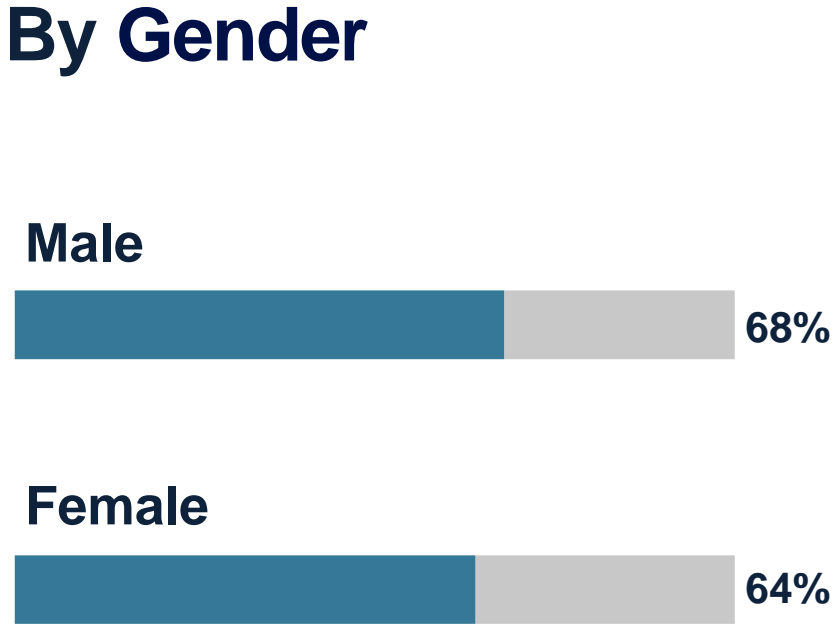


Food & Groceries And Fashion Item Purchases Tend To Be More Planned While Home Items, Travel And Gaming Are Highly Spontaneous Purchases

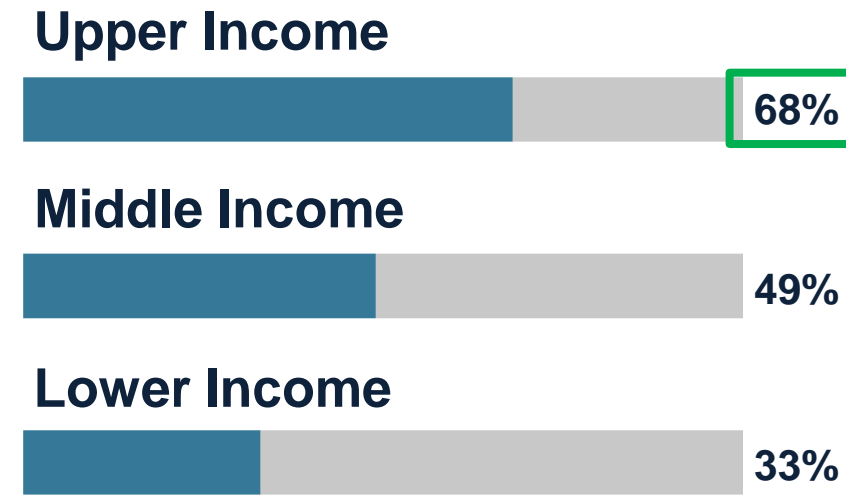
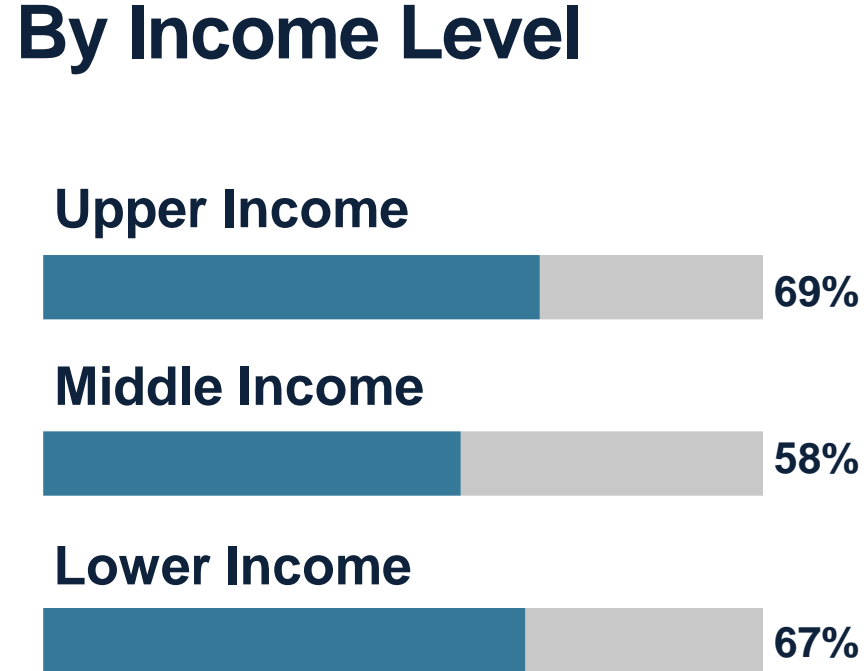
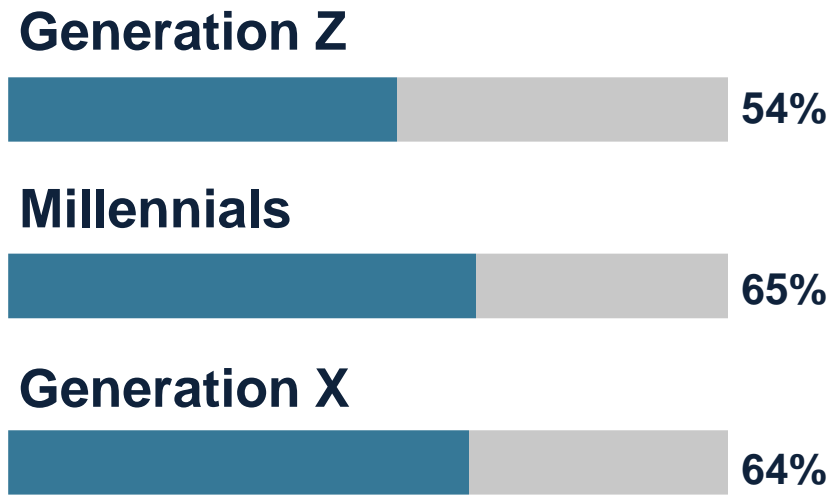
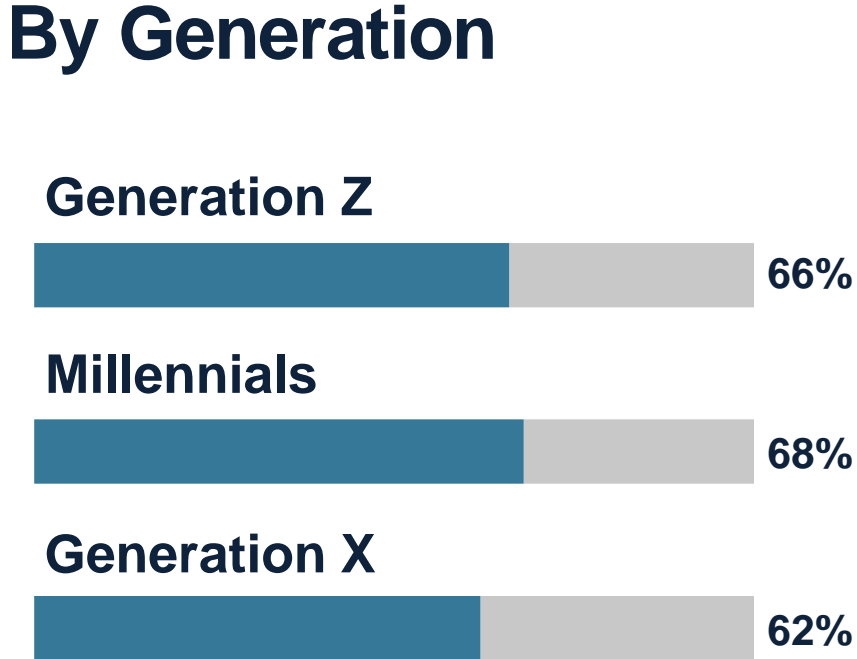
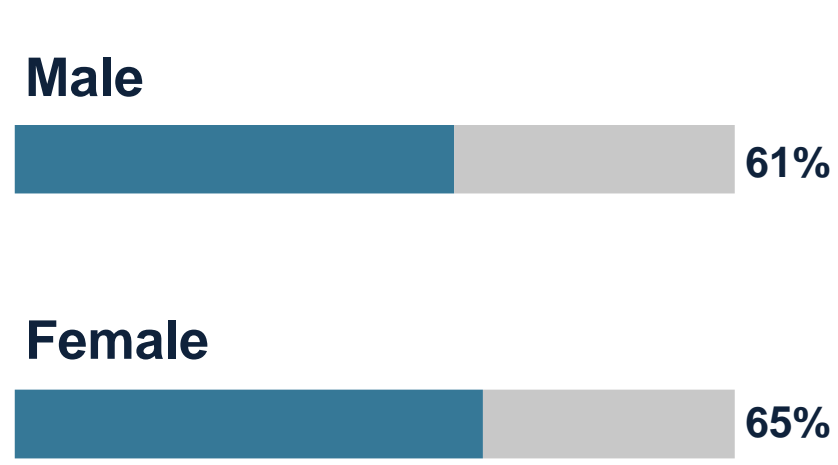


Planning Tends To Exist In The Form Of Wish Lists And Concerning Big Purchases, Where Wish Lists Are Highly Done By Affluent Individuals

 **66%**
Plan & Research High Value Purchases



 **63%**
Have A Planned Wishlist For Shopping During Ramadan

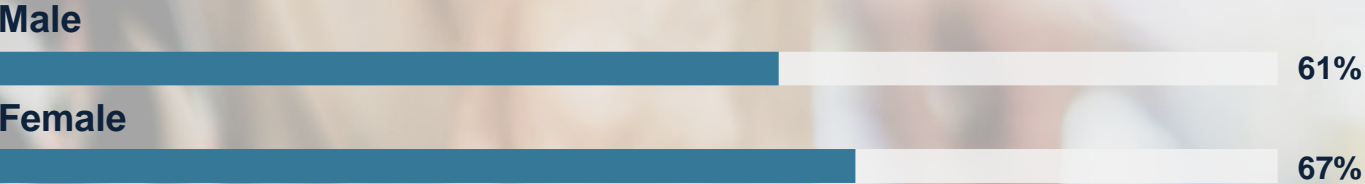


Ramadan Is Also A Time For Exploration, Where 3 In 5 Discover New Products. This Is More Common Amongst People With Higher Incomes

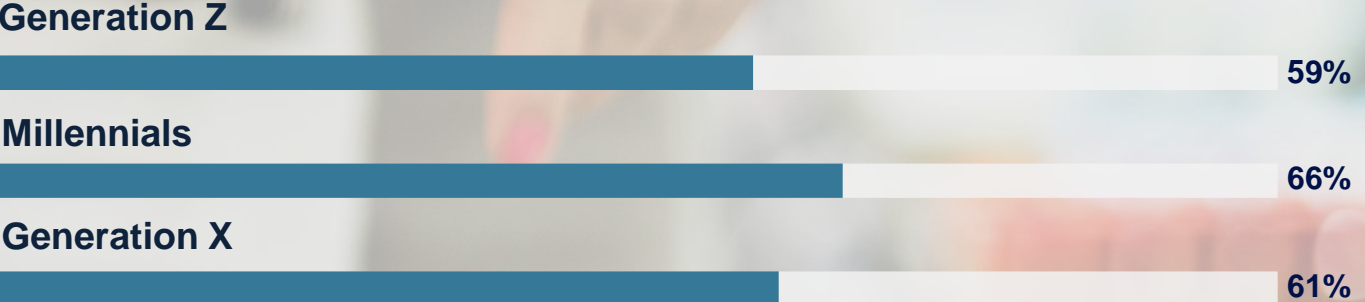
64%

Discover New Products During Ramadan

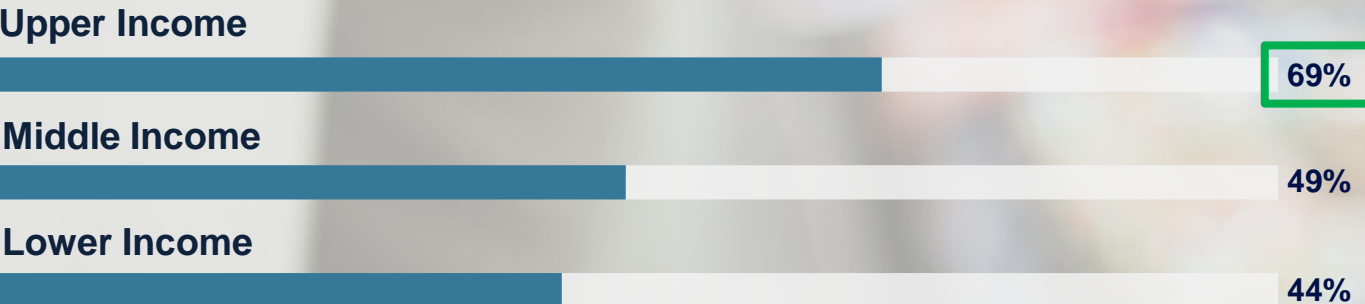
By Gender



By Generation

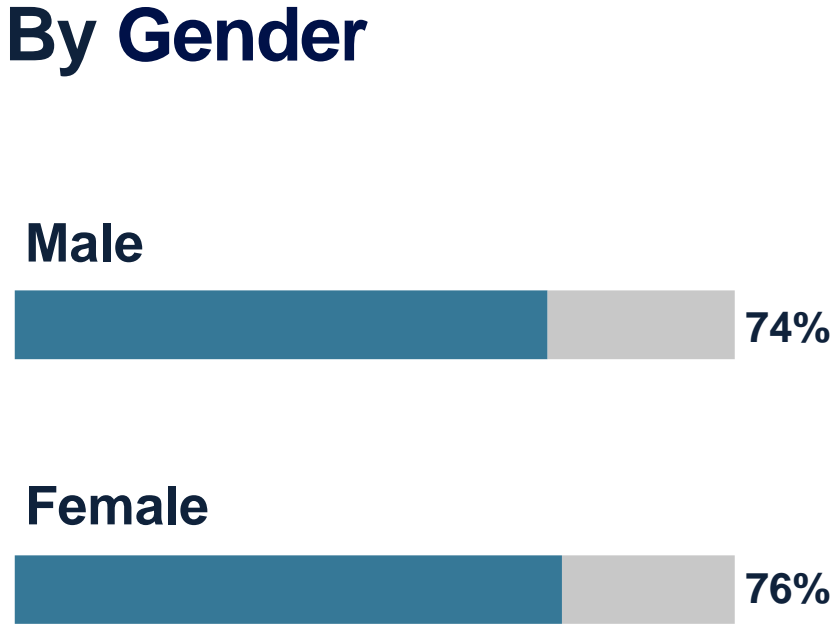


By Income Level

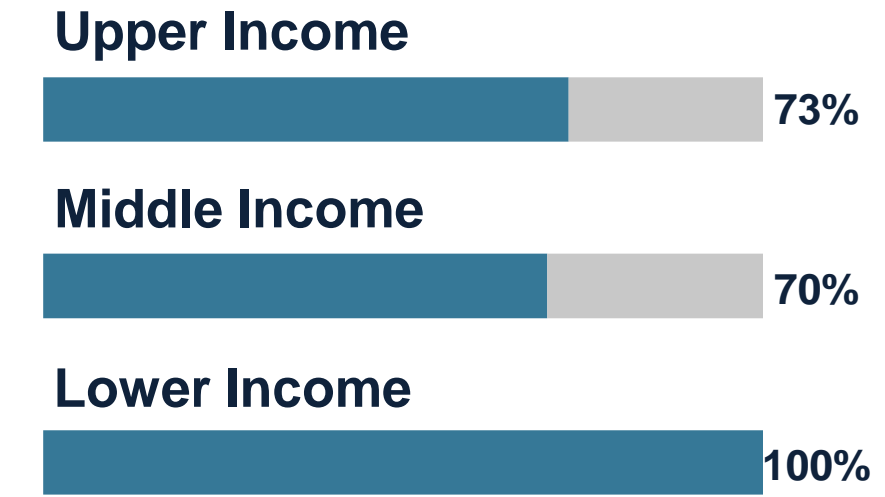
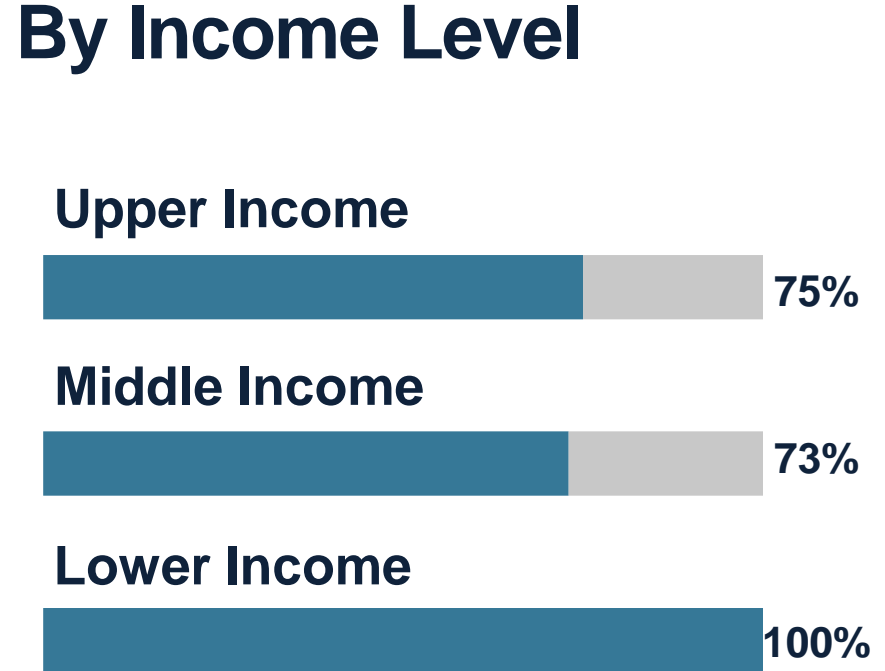
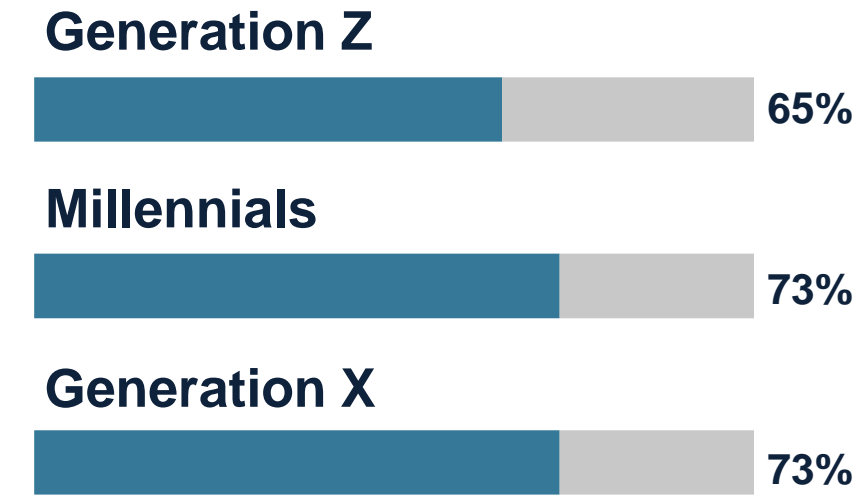
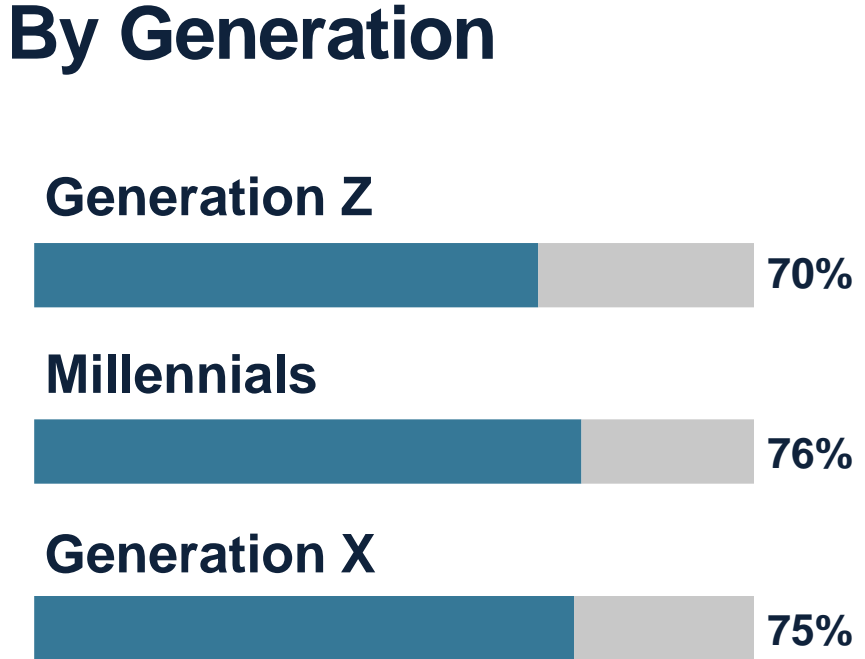
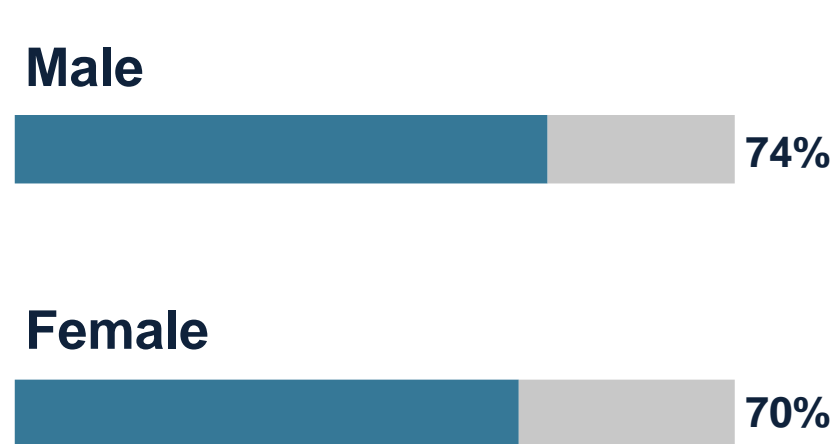


With The Product Exploration Behavior, It Comes To No Surprise That People End Up Buying And Spending More Than Planned

 **75%**
Spend More Than Originally Planned



 **72%**
Buy More Than Planned



9 In 10 Plan Their Eid Gifts During Ramadan And The Older Generation Is More Inclined To Do This

87%
Plan Their Eid Gifts In Ramadan

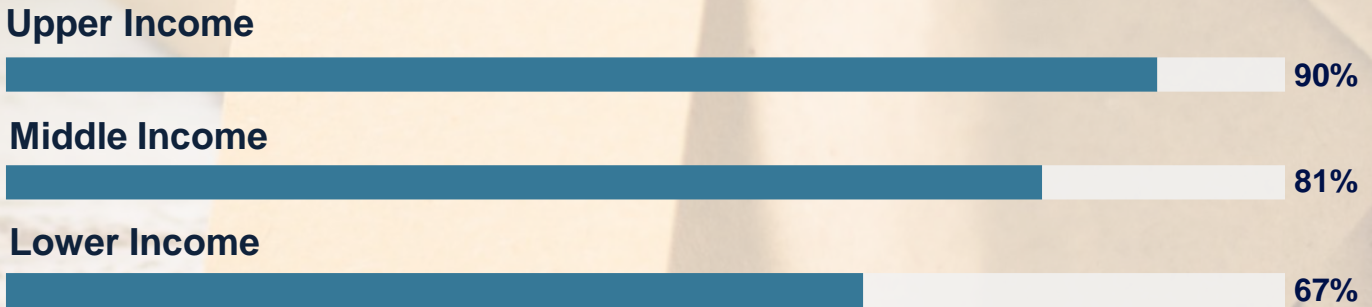
By Gender



By Generation



By Income Level



Planned Shopping Lists For Eid In Egypt Mostly Include Desserts & Chocolates As Well As Clothing & Fashion



Eid Shopping Lists



56%

Desserts &
Chocolates



48%

Clothing &
Fashion



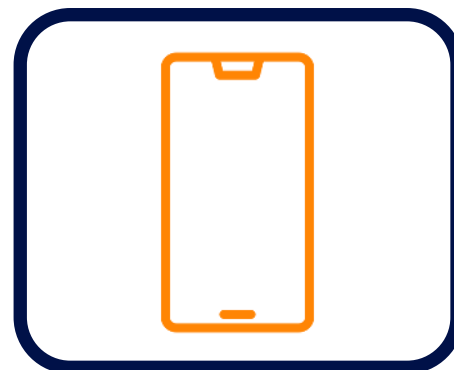
37%

Food &
Beverage



25%

Beauty
Products



24%

Mobile
Phones



18%

Home
Appliances



17%

Household
Products



17%

Home Décor



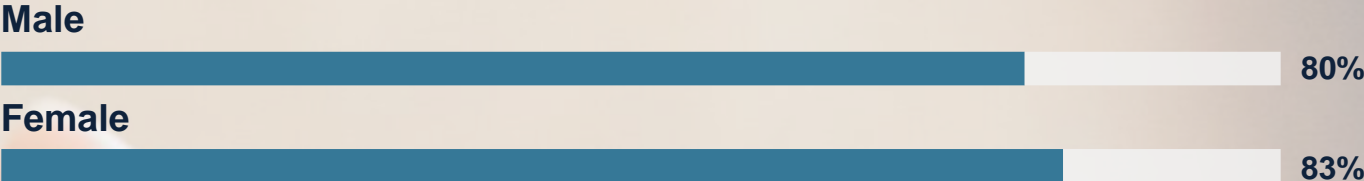
Food Delivery

Food Delivery Is Popular Amongst 8 In 10 Egyptians, Where This Is Slightly Higher For The Upper Income Group

81%

Order Food From Delivery Apps

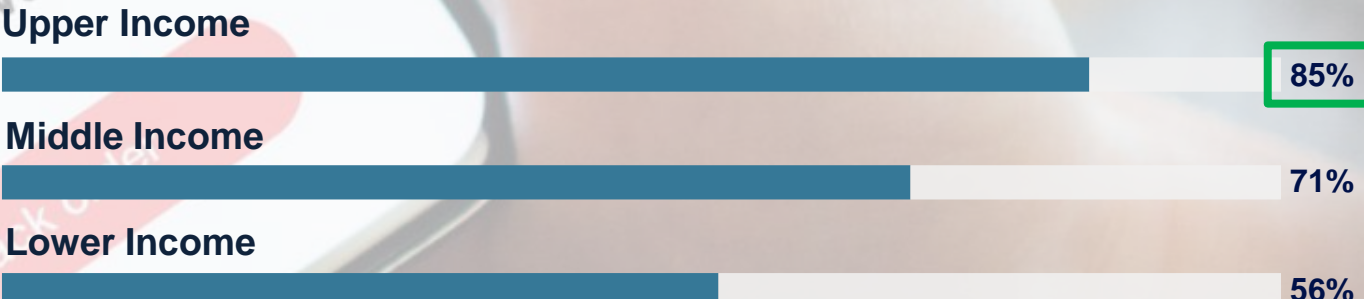
By Gender



By Generation



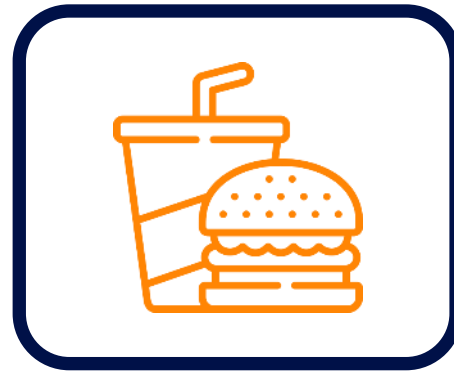
By Income Level



Despite Fast Food Being The Most Popular, People In Ramadan Do Not Limit Themselves When Ordering Delivery



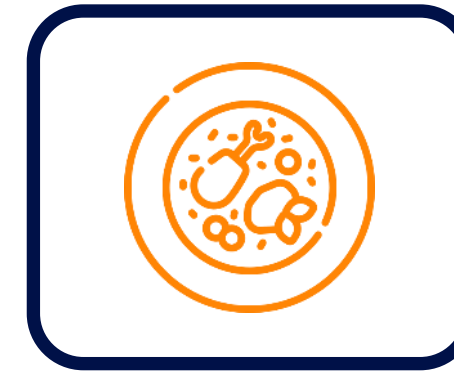
Food Types Ordered



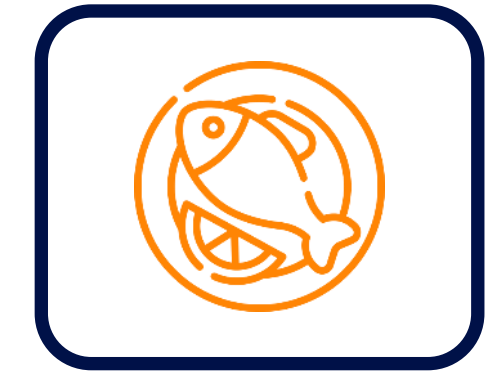
60%
Fast Food



53%
Desserts



41%
Traditional Arab
Food



37%
Healthy Meals



37%
Traditional Food
From Home Country



27%
Fruits











23%
Soups/
Starters



20%
Food That Is
Low In Salt

The Youth Highly Order Fast Food While Healthy Meals And Traditional Food From Home Countries Are More Popular Amongst The Older Generation

<u>Food Types Ordered</u>								
	Fast Food	Desserts	Traditional Arab Food	Healthy meals	Traditional Food From Home Country	Fruits	Soups/ Starters	Food That Is Low In Salt
Total	60%	53%	41%	37%	37%	27%	23%	20%
Male	57%	50%	40%	38%	38%	27%	21%	21%
Female	63%	56%	43%	37%	37%	27%	26%	17%
Generation Z	69%	48%	40%	36%	31%	26%	26%	26%
Millennials	60%	54%	43%	34%	36%	26%	22%	18%
Generation X	52%	54%	38%	48%	45%	30%	25%	20%
Upper Income	62%	57%	45%	38%	39%	28%	25%	19%
Middle Income	49%	32%	25%	30%	28%	17%	13%	21%
Lower Income	25%	50%	25%	100%	50%	50%	50%	25%



Of Those Who Order Food Delivery, About Half Do So For Iftar While 2 In 5 Order For Both Iftar And Suhoor



47%
Mainly Order
For Iftar

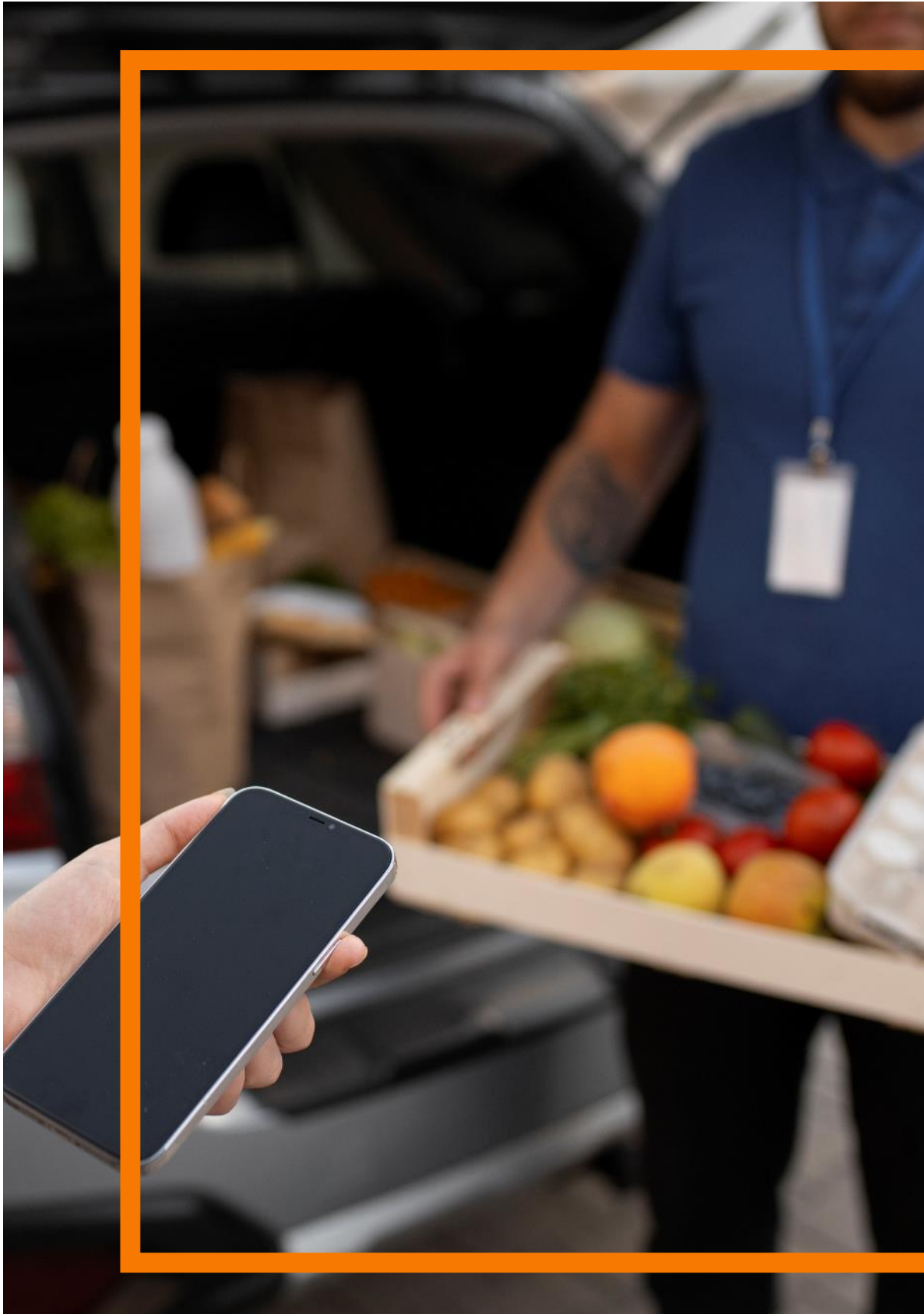


16%
Mainly Order
For Suhoor



38%
Order
For Both

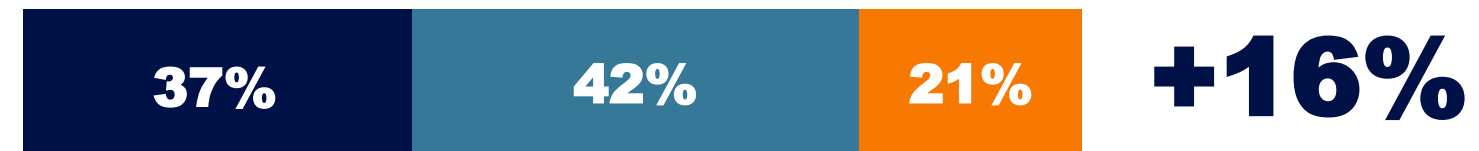
Not Only Do People Use Food Delivery Apps More Frequently During Ramadan, But They Also Use Grocery Delivery Apps More Often



Delivery App Usage During Ramadan



Grocery Delivery App Usage



Food Delivery App Usage



■ Increased ■ No Change ■ Decreased

Females More Likely To Have An Increased Usage Of Grocery Delivery Apps Whereas Food Delivery App Usage Is More driven by Affluent Millennials



Increased Grocery Delivery App Usage

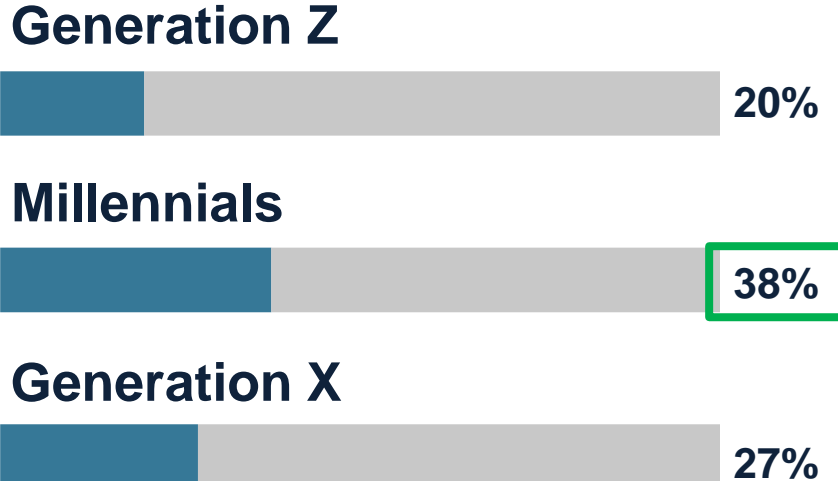
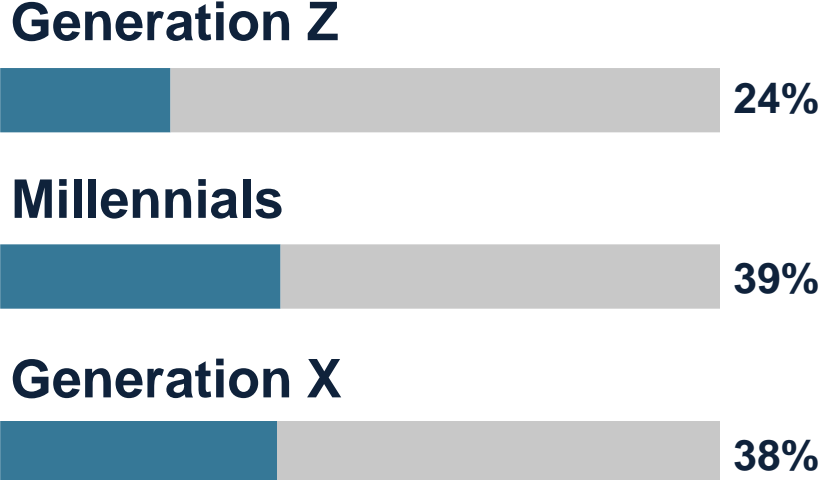


Increased Food Delivery App Usage

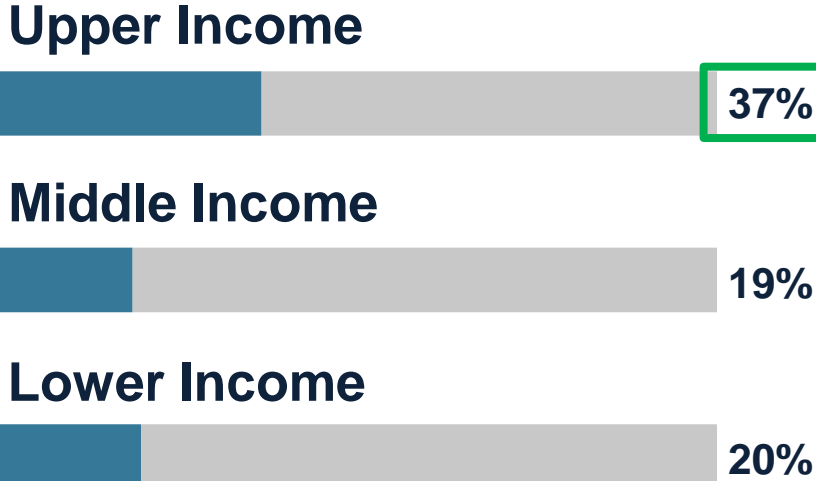
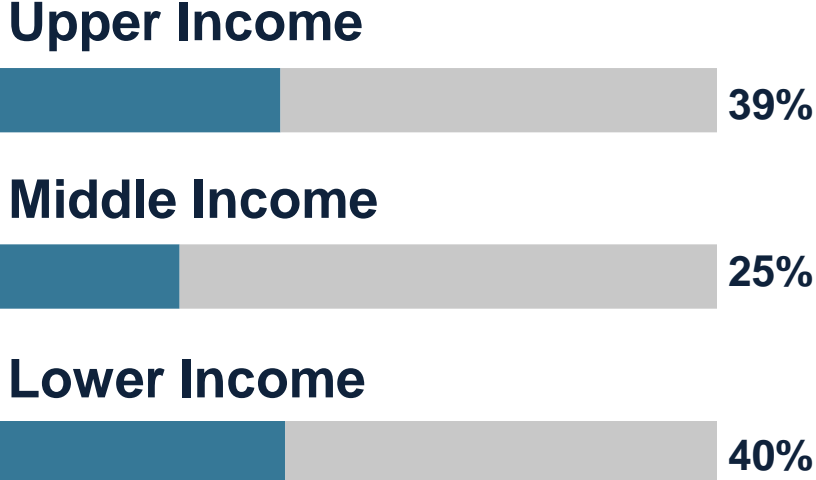
By Gender



By Generation



By Income Level

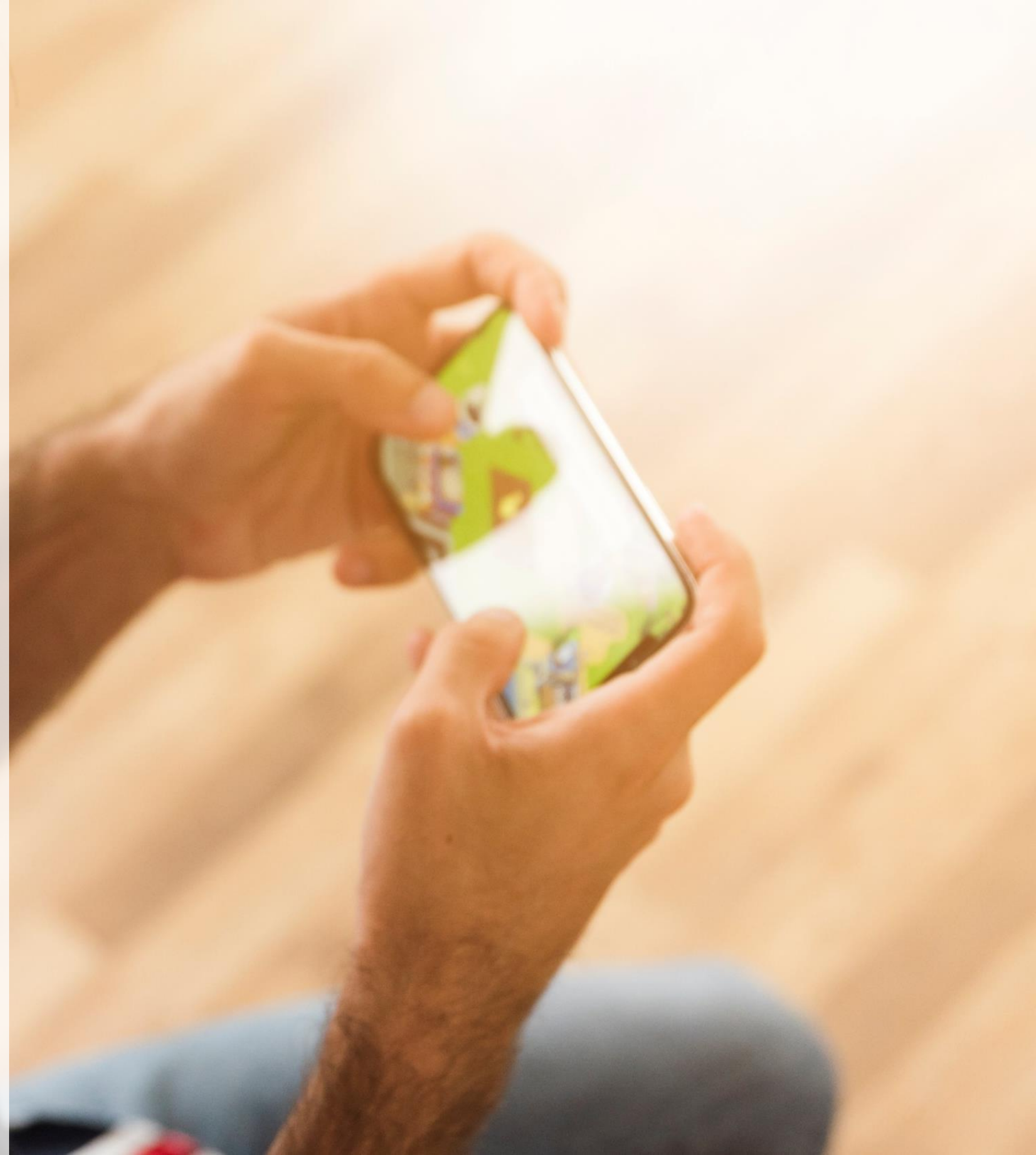


Media Consumption



A man with a beard, wearing a grey and red striped shirt, is shown in profile, looking down at a smartphone. The image is semi-transparent and serves as a background for the text.

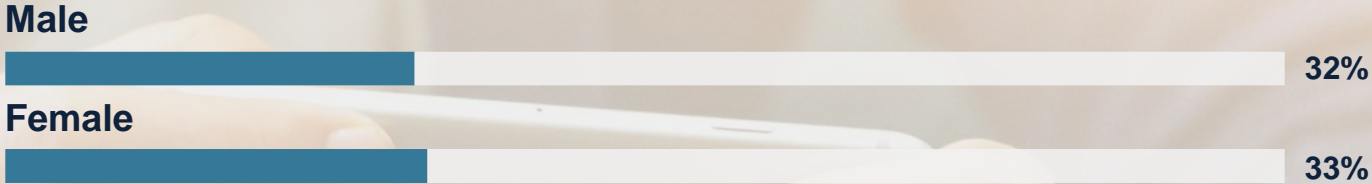
Mobile Games



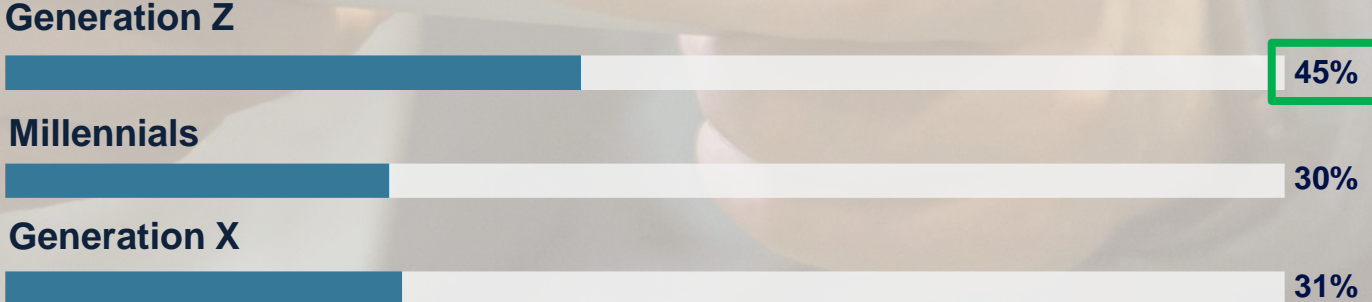
Mobile Games Are Played By 1 In 3 Individuals Where This More Common Among Gen Z

33%
Play Mobile Games

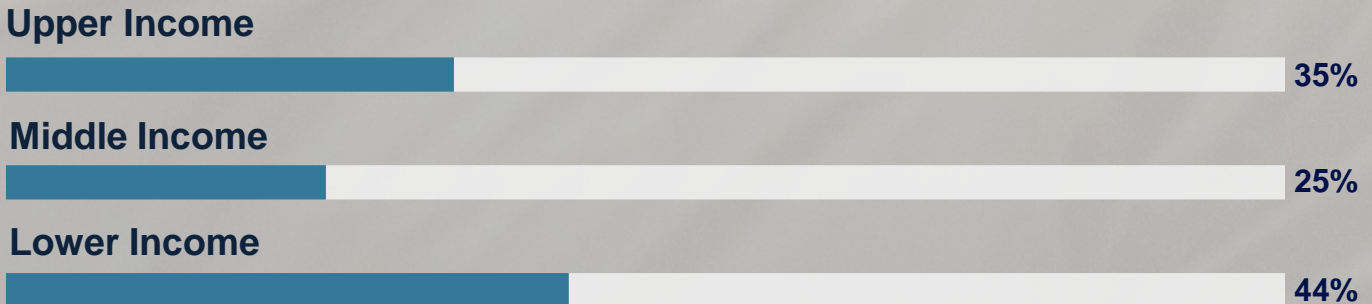
By Gender



By Generation



By Income Level

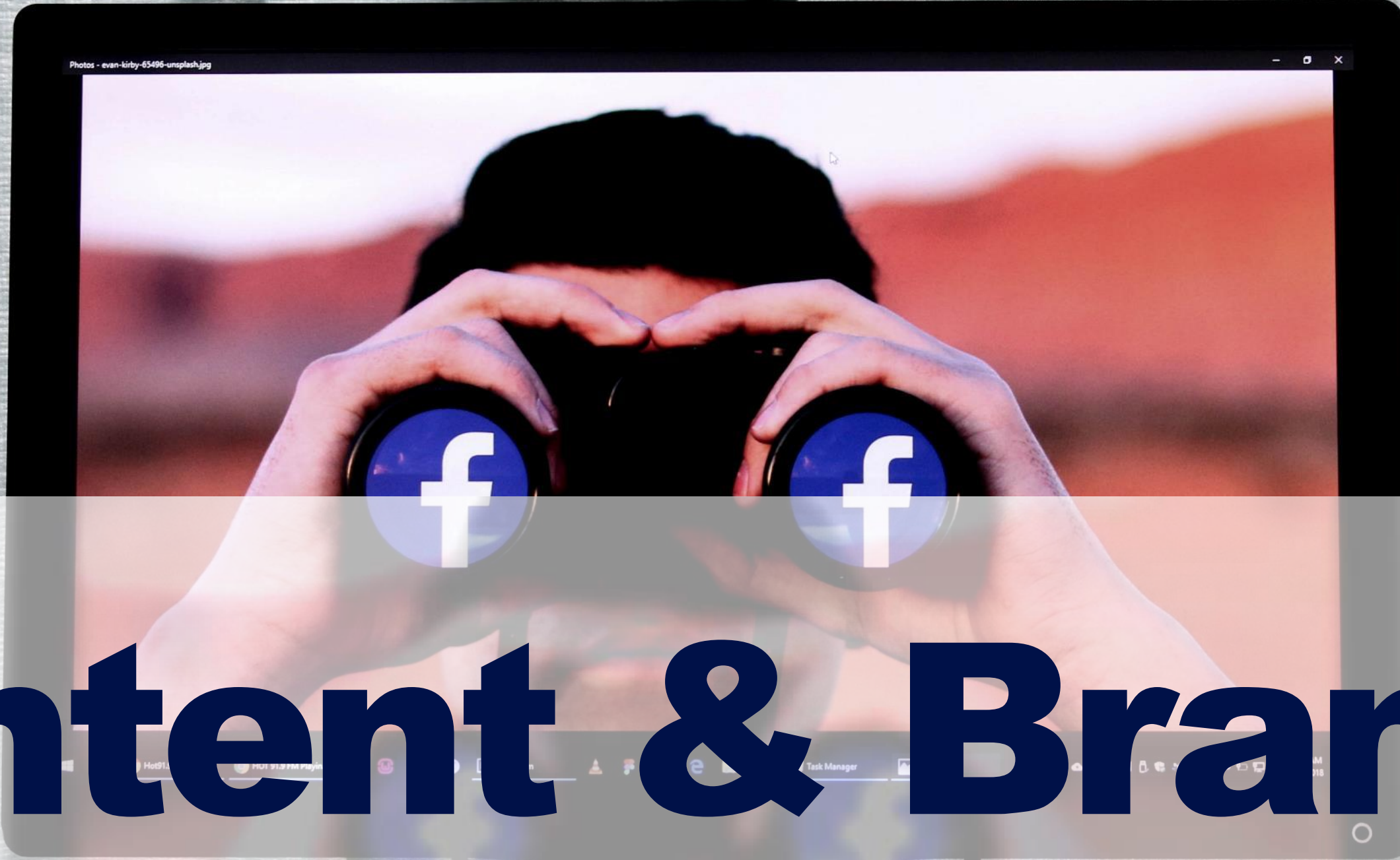




The Majority Of Those Who Play Games On Their Phone Do So Everyday

Frequency Of Usage





Content & Brand Expectations

People Are Drawn To Many Types Of Content Throughout Ramadan, Particularly Holy Content And Content Related To Ramadan Festivities

Sought Out Content During Ramadan



81%

Ramadan Related Holy Content



75%

Ramadan Festivities Related Content



71%

Entertaining Videos



68%

Ramadan Home Décor Ideas



67%

Deals & Offers



65%

Product Reviews / Unboxing Videos



65%

Content Related To Specific TV Channels



64%

Ramadan Recipes



62%

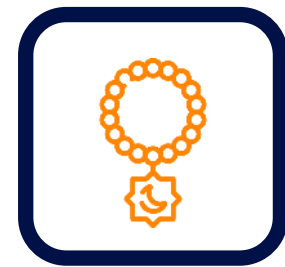
Ramadan Fashion Tips & Ideas

Home Décor, Recipes And Fashion Tips Are More Likely To Be Of Interest To Females While Entertaining Videos, Product Reviews And TV Channel Content Is More Popular Amongst Affluent Individuals

Sought Out Content During Ramadan



Ramadan Related Holy Content



Ramadan Festivities Related Content



Entertaining Videos



Ramadan Home Décor Ideas



Deals & Offers



Product Reviews / Unboxing Videos



Content Related To Specific TV Channels



Ramadan Recipes



Ramadan Fashion Tips & Ideas

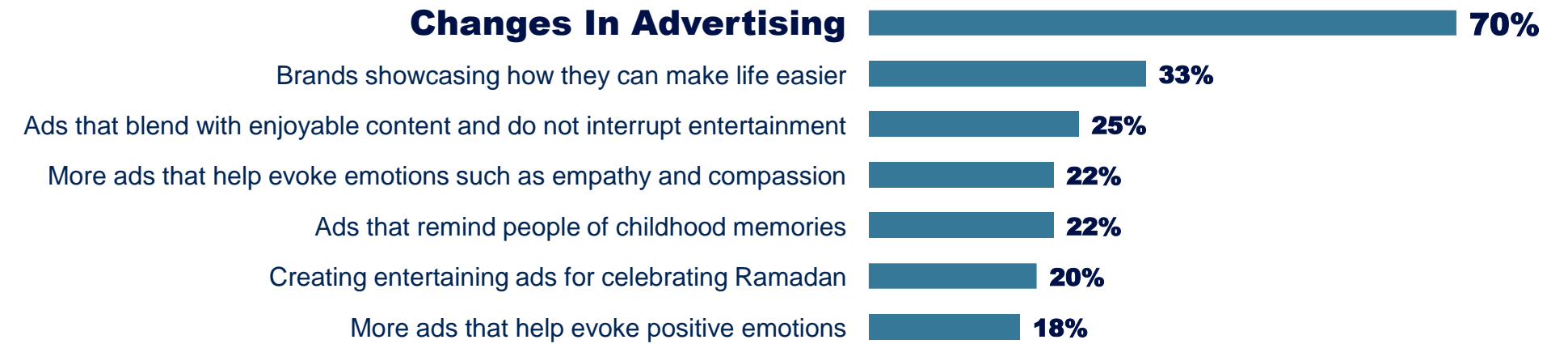
	Ramadan Related Holy Content	Ramadan Festivities Related Content	Entertaining Videos	Ramadan Home Décor Ideas	Deals & Offers	Product Reviews / Unboxing Videos	Content Related To Specific TV Channels	Ramadan Recipes	Ramadan Fashion Tips & Ideas
Total	81%	75%	71%	68%	67%	65%	65%	64%	62%
Male	78%	75%	69%	60%	66%	62%	64%	59%	54%
Female	85%	75%	72%	77%	68%	67%	66%	71%	71%
Generation Z	80%	72%	60%	58%	63%	58%	55%	62%	66%
Millennials	81%	76%	73%	72%	68%	67%	68%	66%	63%
Generation X	83%	74%	71%	64%	67%	63%	63%	62%	56%
Upper Income	81%	78%	77%	70%	70%	71%	70%	66%	65%
Middle Income	82%	65%	53%	62%	59%	48%	51%	60%	52%
Lower Income	78%	89%	44%	56%	60%	44%	44%	58%	56%

Despite High Content Consumption, People Still Expect Changes From Brands In Ramadan Where The Need For Changes In Advertising Is The Highest

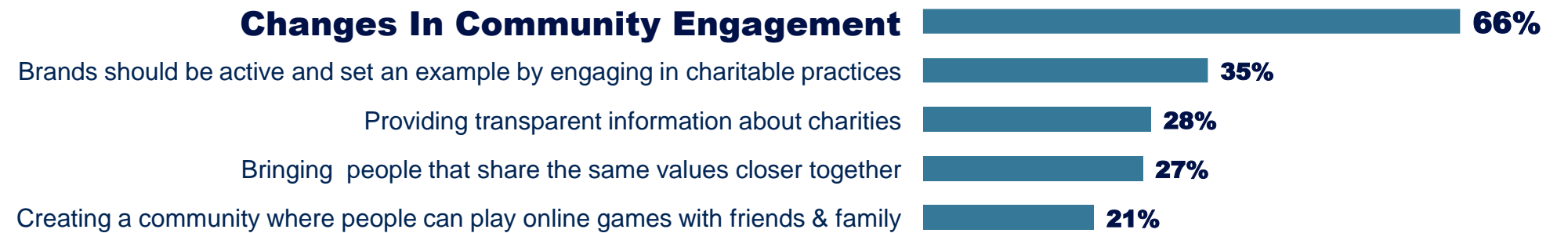


People's Expectations Of Brands During Ramadan

Changes In Advertising



Changes In Community Engagement




Changes In Content




Changes In Commerce



Affluent People Are More Likely To Expect Brands To Make Changes Related To Community Engagement Whereas Gen Z Are More Likely To Expect Changes In Commerce

 **70%**
Changes In Advertising

 **66%**
Changes In Engagement

 **65%**
Changes In Content

 **60%**
Changes In Commerce

By Gender

Male 68%

Female 71%

Male 68%

Female 64%

Male 64%

Female 66%

Male 59%

Female 60%

By Generation

Generation Z 70%

Millennials 70%

Generation X 68%

Generation Z 69%

Millennials 65%

Generation X 67%

Generation Z 65%

Millennials 65%

Generation X 64%

Generation Z 64%

Millennials 59%

Generation X 57%

By Income Level

Upper Income 72%

Middle Income 65%

Lower Income 44%

Upper Income 70%

Middle Income 55%

Lower Income 67%

Upper Income 66%

Middle Income 62%

Lower Income 44%

Upper Income 61%

Middle Income 55%

Lower Income 67%

Thank You

For more information please contact:

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GAME CHANGERS

