

The Ramadan Handbook

2023

KSA Edition

GAME CHANGERS



Table Of Content

01. Study
Background &
Findings

02. General
Behavior Changes

03. Shopping
Habits

04. Food Delivery

05. Media
Consumption

06. Content &
Brand Expectations





Study Background & Findings

Sample & Methodology



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



500 Respondents



Males & Females



15 years & Above



Nationwide Coverage



Online Interviews

Summary Of Findings

A Time For Prioritizing What Matters

During Ramadan, People in Saudi Arabia start focusing on things that matter the most to them. People reflect inwards as they focus on practicing their faith and making positive changes in regard to their health while paying attention to their surroundings as they engage in their community by giving back. People also spend more time with their loved ones leading to 4 in 10 staying at home more often than usual, mainly young affluent females. Most importantly, many make the most of their time at home discovering new tips and tricks as well as learning new skills.

Travel Is A Big Part Of The Holy Month

In Ramadan, 7 in 10 people travel where this is more prevalent amongst affluent males. Looking into travel behavior between the generations shows that the youth travel more domestically during Ramadan while the older generation travel more outside the kingdom. With this travel behavior comes the need to utilize travel and tourism apps which witness a 7% increase in usage during Ramadan. Such apps are more likely to be used by youth belonging to the lower income group.

Groceries Are The Most Purchased Category During Ramadan

The vast majority of people shop in Ramadan where this is more dominant amongst affluent females. 2 in 5 shop for food and groceries making it the most purchased category during the holy month followed by electronics. Shopping for groceries is mainly done through utilizing both online and offline channels although Gen Z are seen to be highly shopping for groceries online while males are more likely to go through the in-store experience.

The Popularity Of Delivery During Ramadan

Food delivery is particularly popular during Ramadan, with nearly 9 out of 10 people ordering through apps, only with the upper income group ordering significantly more. This results in an increased usage of food delivery apps which witness a 9% increase compared to the rest of the year. During Ramadan, people also use grocery delivery apps more frequently, with a 17% increase in usage. When it comes to the categories ordered, even though fast food is the most common choice, people in Ramadan do not limit themselves to one type of food while ordering delivery.

Summary Of Findings

Planning VS Impulse Shopping During Ramadan

Shopping behavior in Ramadan is split in terms of planning nature, nonetheless the youth engage more in impulsive shopping while the lower income group is more careful in their planning behavior. Differences in planning can also be seen when looking at the category shopped for; Home-related purchases are more likely to be planned, whereas gaming-related purchases are more likely to be spontaneous. Planning also takes other forms where individuals plan wish lists for shopping during Ramadan, Eid gifts as well as the planning that comes before high value purchases, where the latter is more common amongst young affluent males.

Despite High Content Consumption, People Still Expect Changes

People respond to a variety of content during Ramadan, particularly holy content and everything related to the celebration of Ramadan, such as decorations, clothes, and festivities. The affluent younger generation are much more drawn to fashion-related content, whilst the older generation is more likely to show diversity in the type of content they follow. That said, people continue to demand changes from brands even though they consume a lot of content, especially during Ramadan when the need for changes in both advertising and content is greatest. While Gen Z is very interested in changes to content, the older generation is more likely to expect brands to make changes to all aspects from advertising and content to commerce and engagement.



General Behavior Changes

In Saudi Arabia, People Eagerly Anticipate Ramadan, Where It Is Most People's Favorite Time Of The Year

84%

**Are Excited For
Ramadan**

75%

**State That Ramadan
Is Their Favorite
Month**



The Majority Practice Their Faith Through Higher Exposure To Religious Content, More Prayer And Visits To The Mosque As Well As Community Engagement Through Helping Those In Need



96%

Giveback To
People In Need



94%

Listen/Read To More
Quran & Religious Content



93%

Increase Frequency
Of Prayers



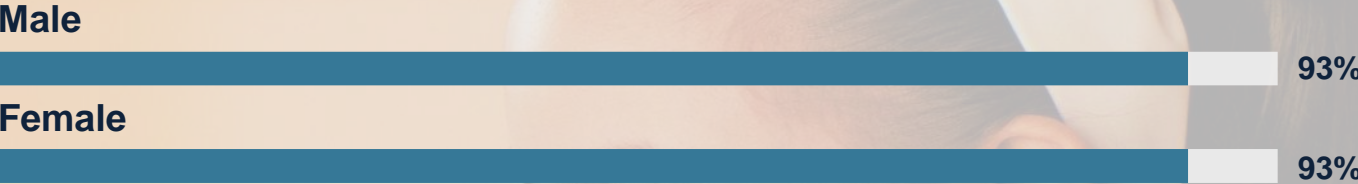
91%

Pray At The Mosque
More Than Usual

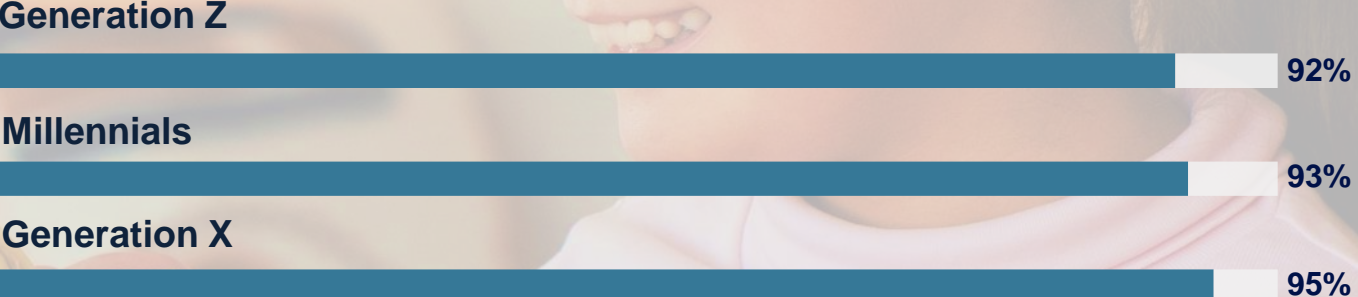
Ramadan Is Also A Time For Loved Ones, As Almost Everyone Spends More Time With Friends And Family

9 in 10
Spend More Time With Friends & Family

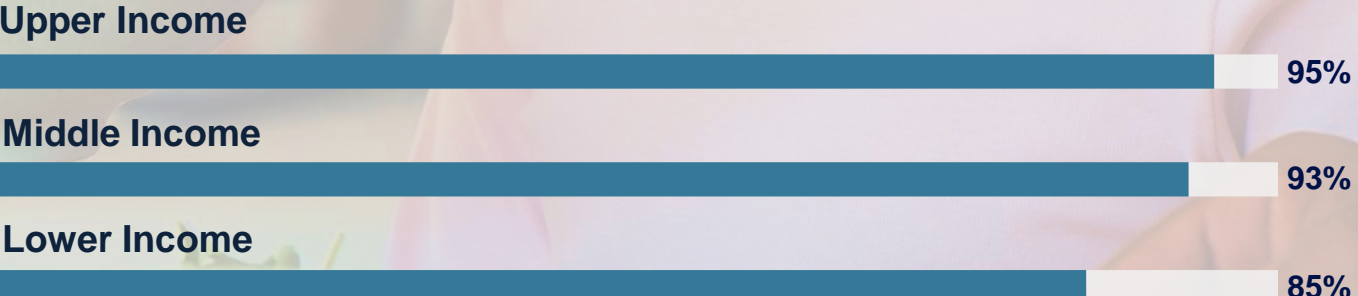
By Gender



By Generation



By Income Level

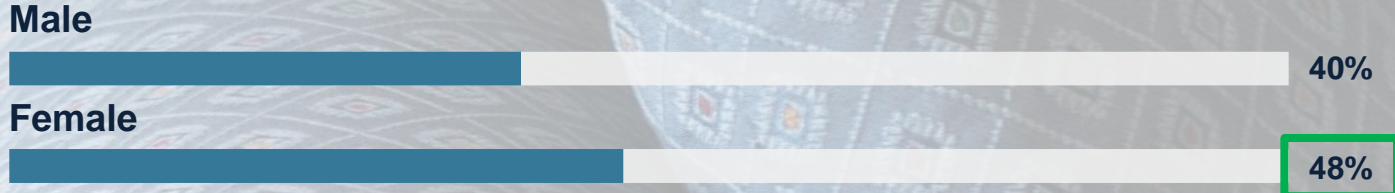


As People Spend More Time With Loved Ones, 4 In 10 Are Spending More Time At Home. This Is More Prominent Amongst Young Affluent Females

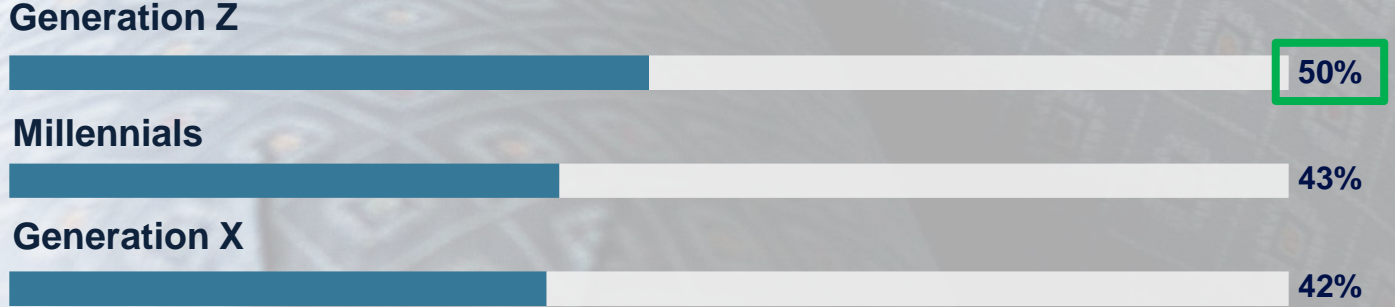
44%

Spend More Time At Home During Ramadan

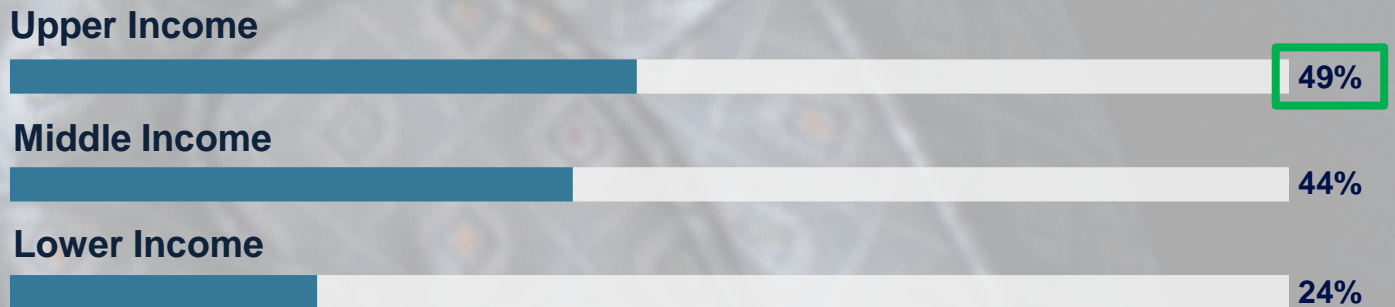
By Gender



By Generation



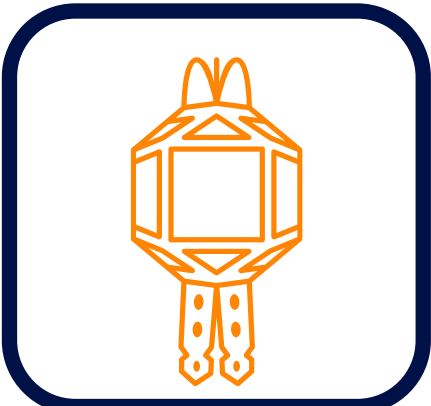
By Income Level



With More Time Spent At Home, It Comes To No Surprise That People Pay Close Attention To Their Personal Spaces



Decorate Their Homes For Ramadan 91%



Shop for Ramadan Décor For Home 87%



Many Make The Most Of Their Time At Home, Where 4 In 5 Discover New Tips And 3 In 5 Learn New Skills. The Former Is Prevalent Among The Affluent Group Whereas The Latter Is More Common Among The Youth

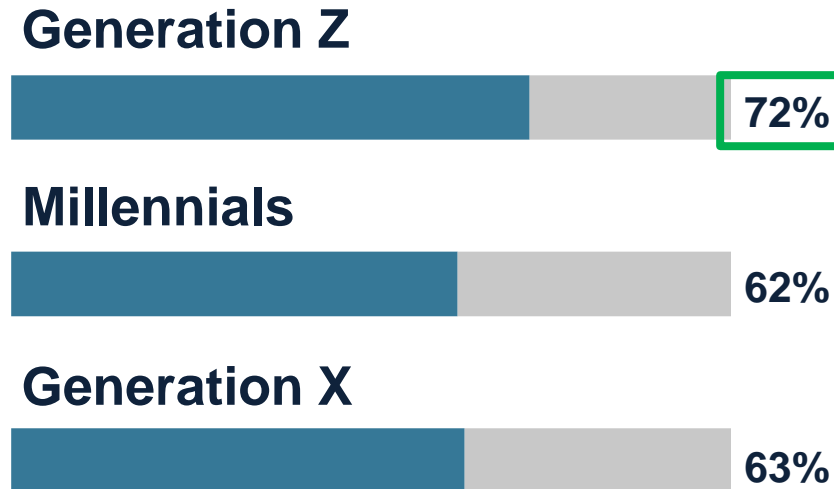
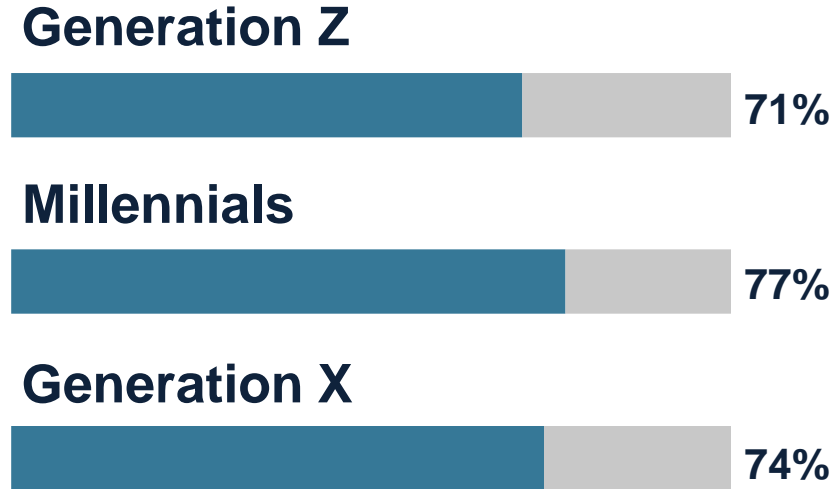
 **76%**
Discover New
Tips & Tricks

 **64%**
Learn New
Skills

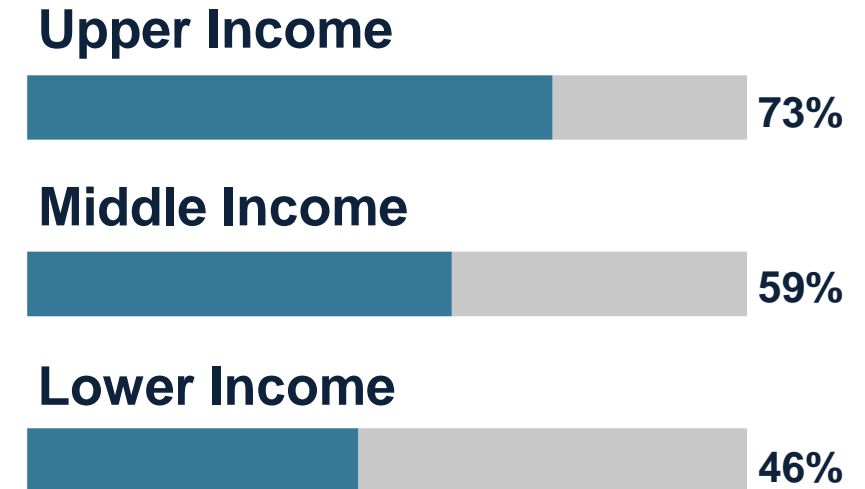
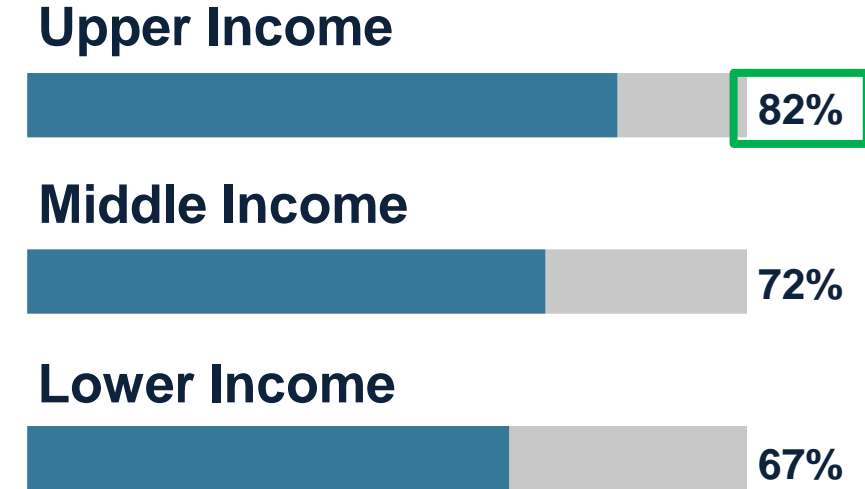
By Gender



By Generation



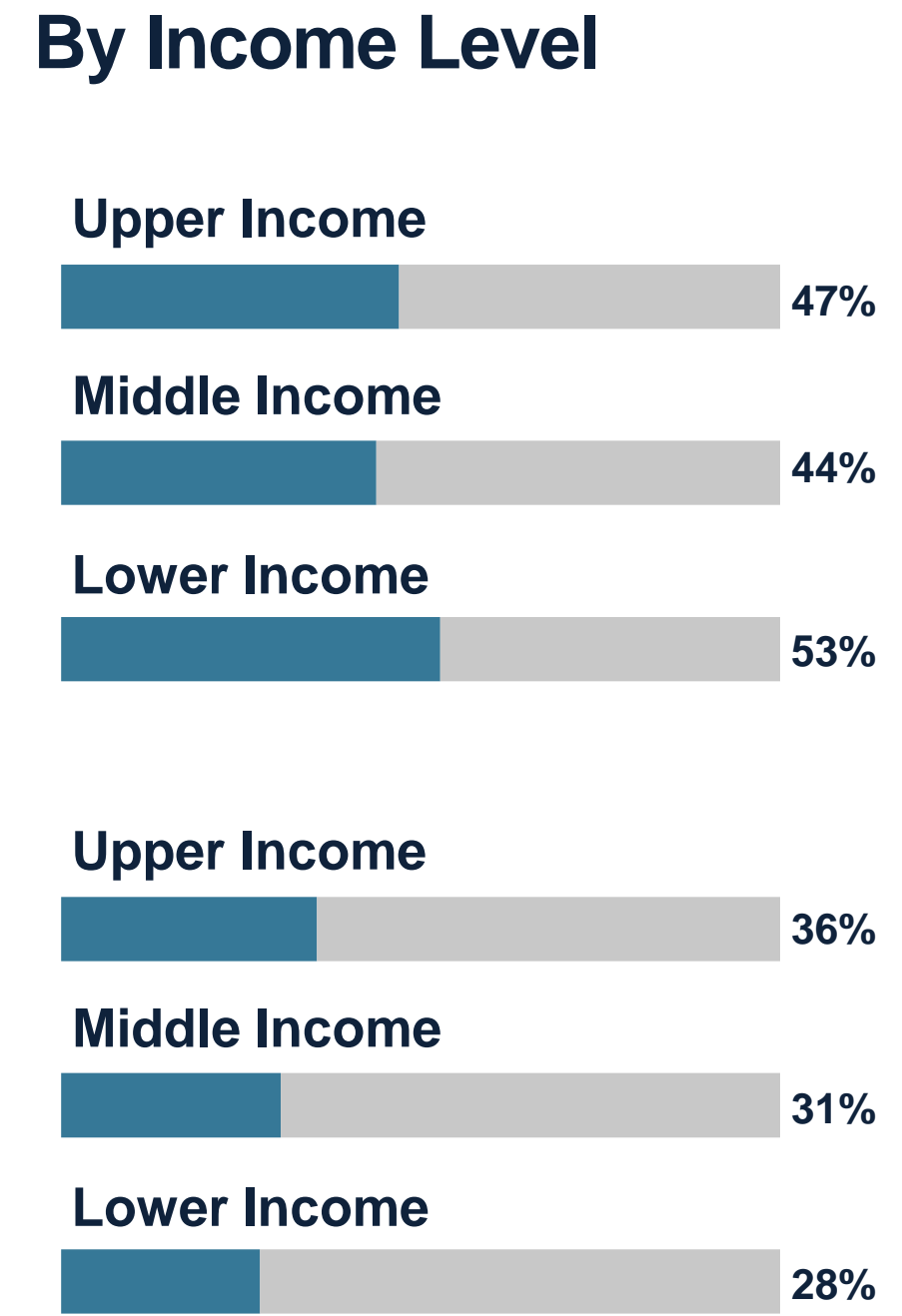
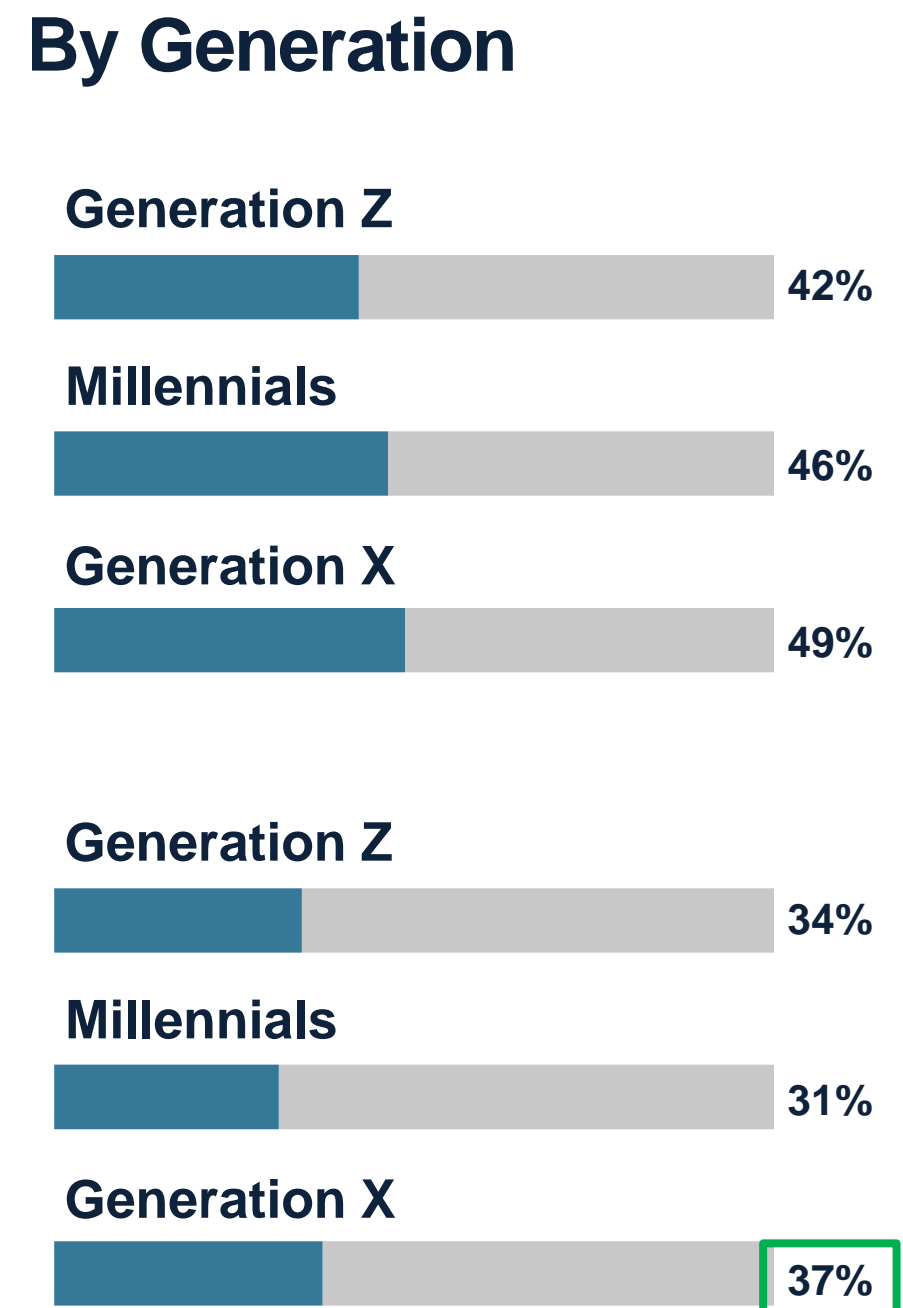
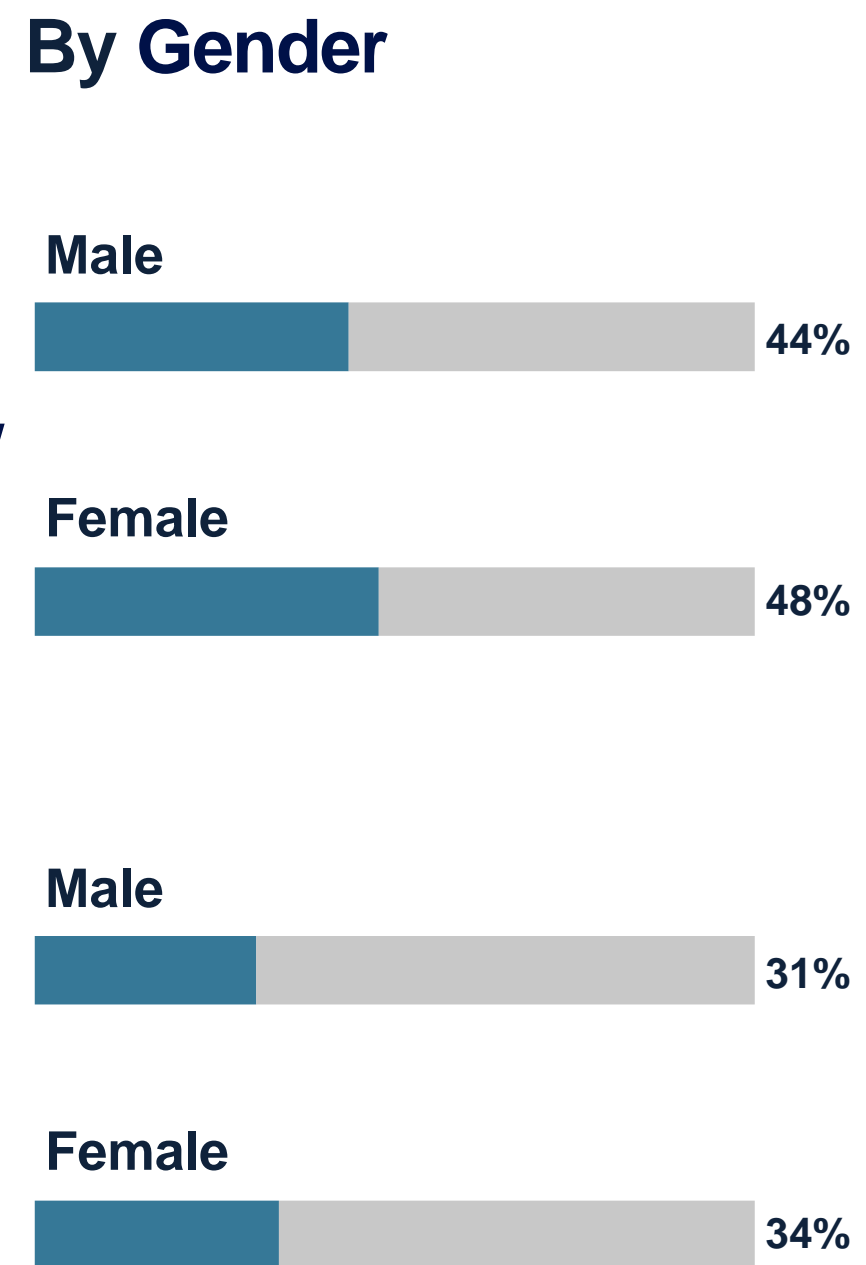
By Income Level



With More Time Spent Indoor, People In Saudi Arabia Are Eating In More. Despite That, Gen X Are More Likely To Eat Outside

 **46%**
Eat More At Home/
Indoor

 **33%**
Eat More
Outdoor



The Majority Reflect Inwards Focusing On The Need To Make Changes In Pursuit Of A Healthier Lifestyle



**Change
Sleeping Habits** **93%**



**Look Up Healthy
Food Recipes** **90%**



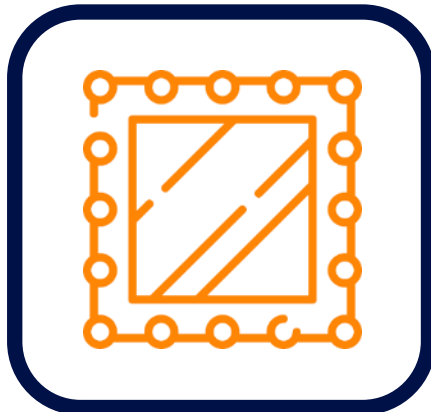
**Exercise
More** **81%**



People Also Utilize Their Time In Ramadan To Do Some Self Care



**Go More To
Wellness Centers 63%**



**Spend More Time
In Beauty Centers 63%**

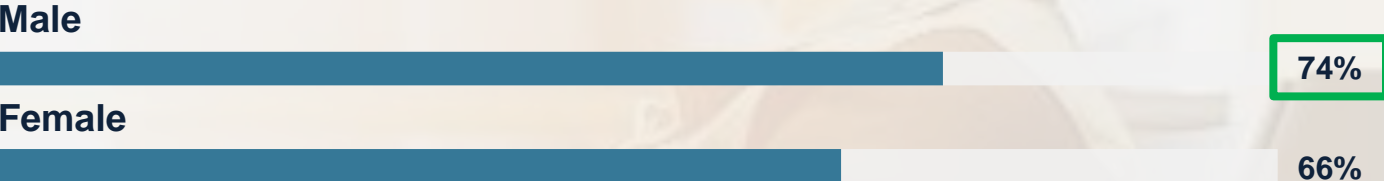


7 In 10 People Travel During Ramadan Where Males Belonging To The Upper Income Group Are More Likely To Do So

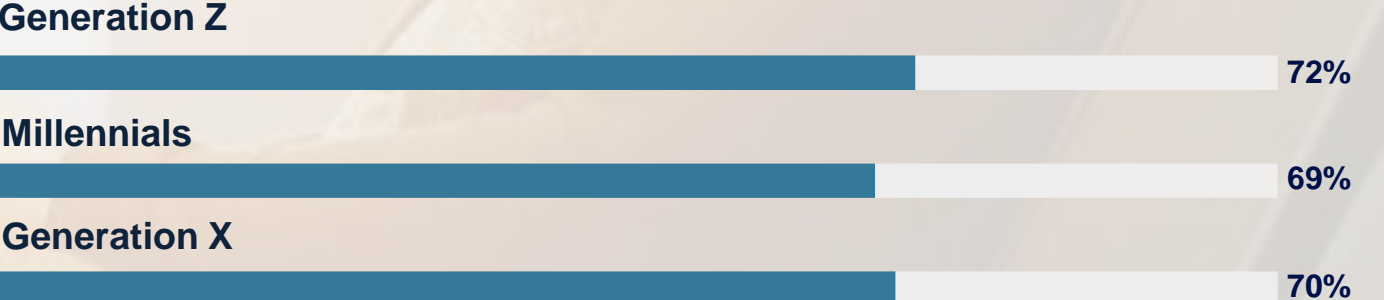
69%

Travel During Ramadan

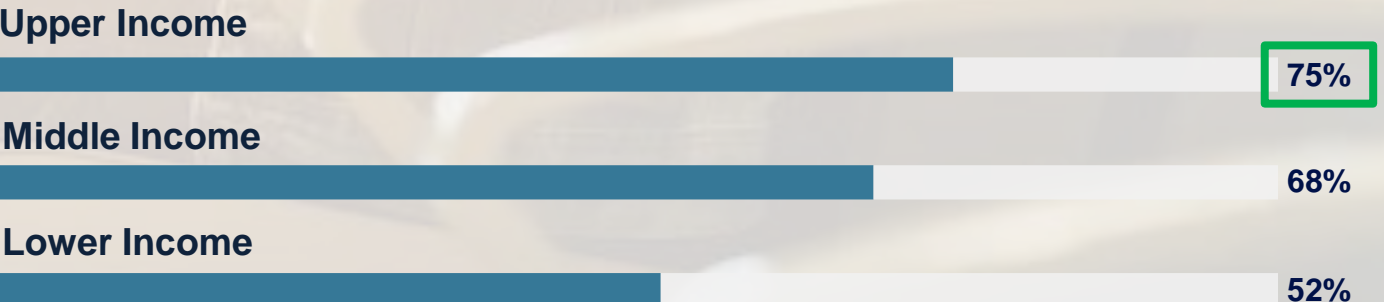
By Gender



By Generation



By Income Level



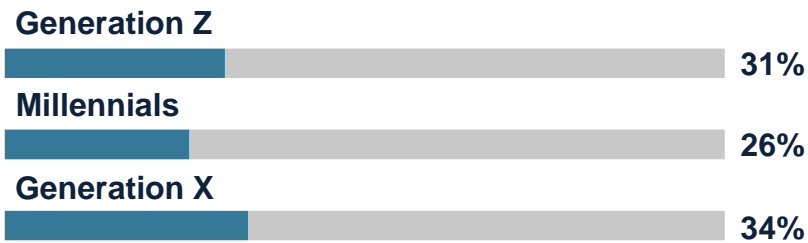
3 In 10 Travel More Often Than Usual During The Holy Month, Where The Youth Are More Likely To Travel Domestically, And The Older Generation Tend To Travel More Internationally

 **28%**
Travel More
During Ramadan

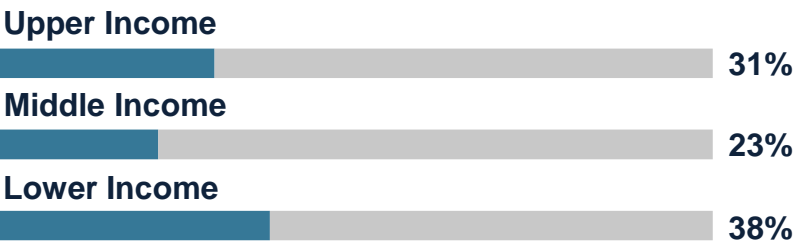
By Gender



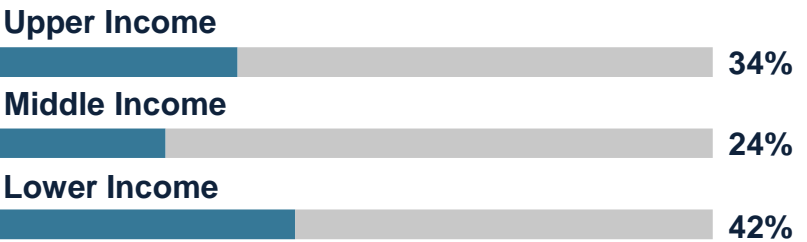
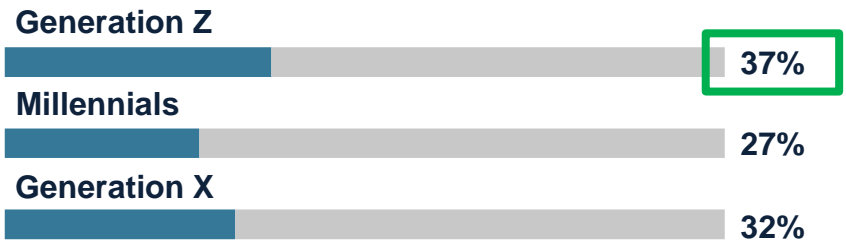
By Generation



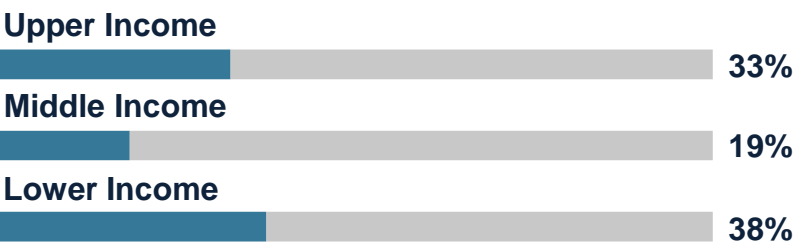
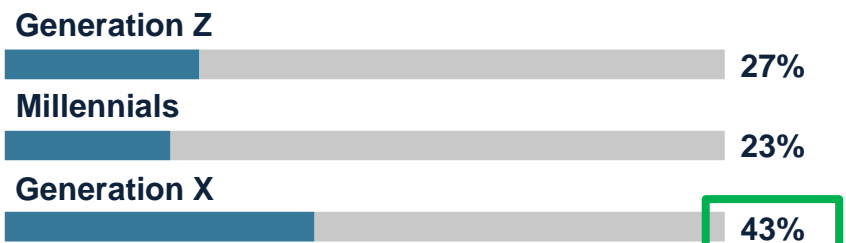
By Income Level



 **30%**
Travel More
Domestically



 **26%**
Travel More
Outside KSA

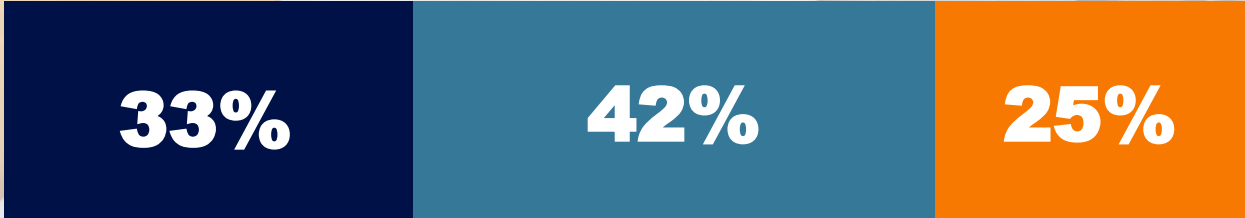


Travel And Tourism Apps Have An Increased Usage During Ramadan. This Increase Is More Common Among Gen Z And Those Belonging To The Lower Income Group



Travel & Tourism App Usage

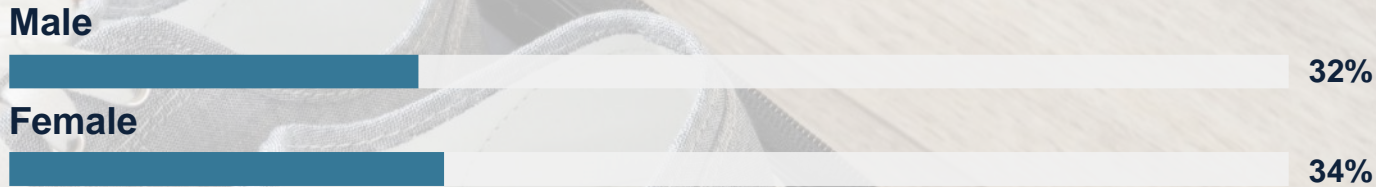
+7%



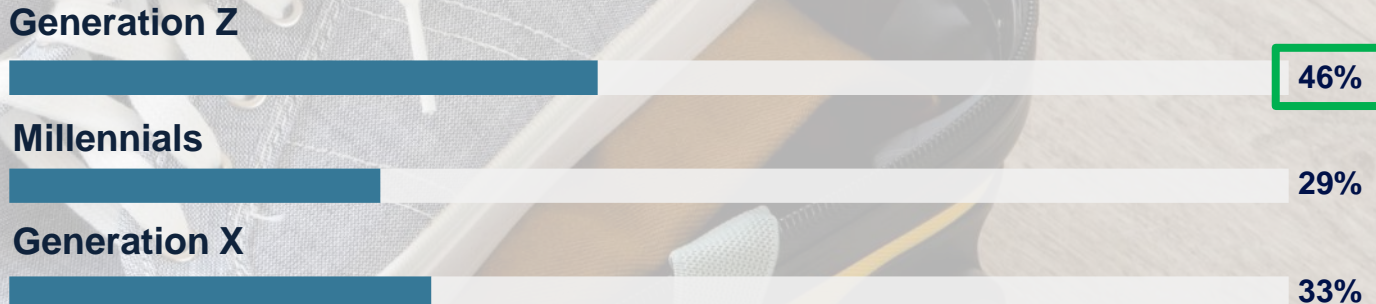
■ Increased ■ No Change ■ Decreased

By Gender

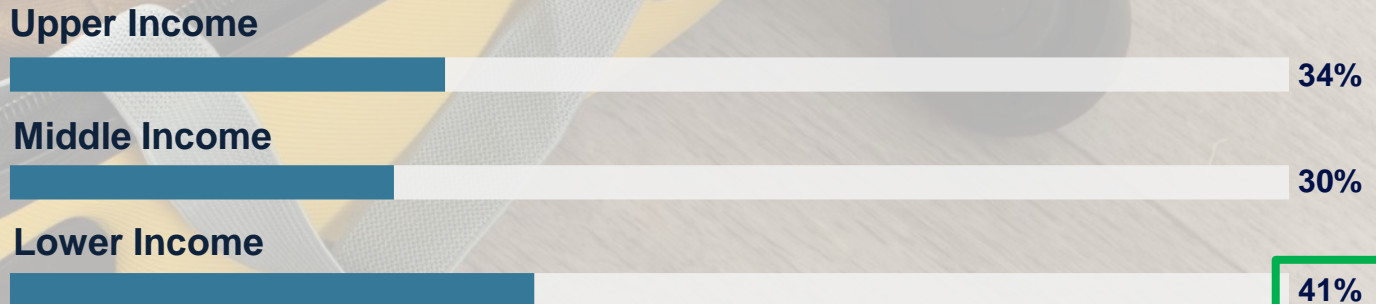
%Increased



By Generation



By Income Level



Eid Travel Plans Are Mostly Domestic, Where Young Affluent Males Are More Likely To Make Them



43%

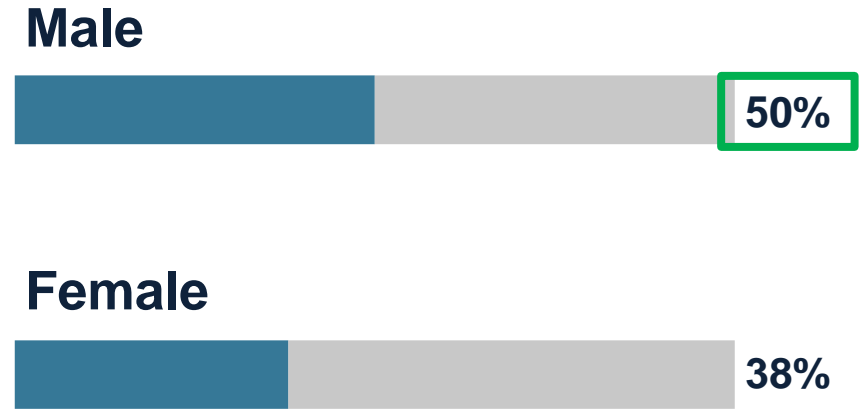
Plan To Travel Domestically During Eid



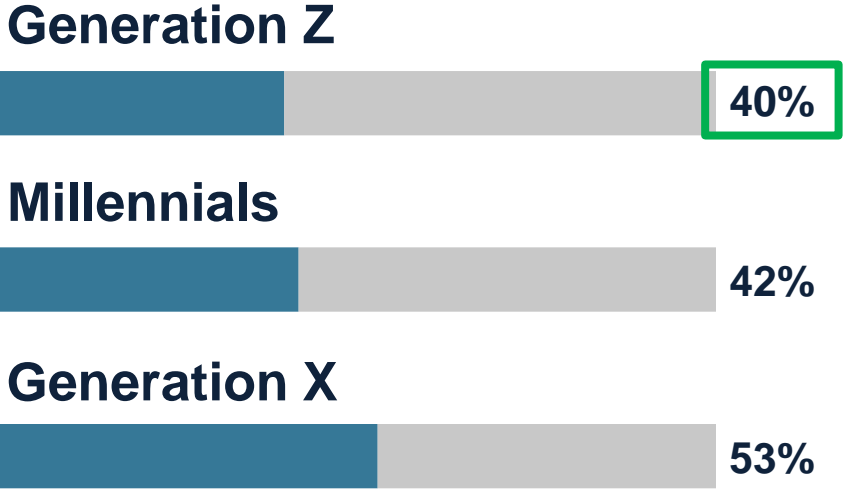
20%

Plan To Travel Outside KSA During Eid

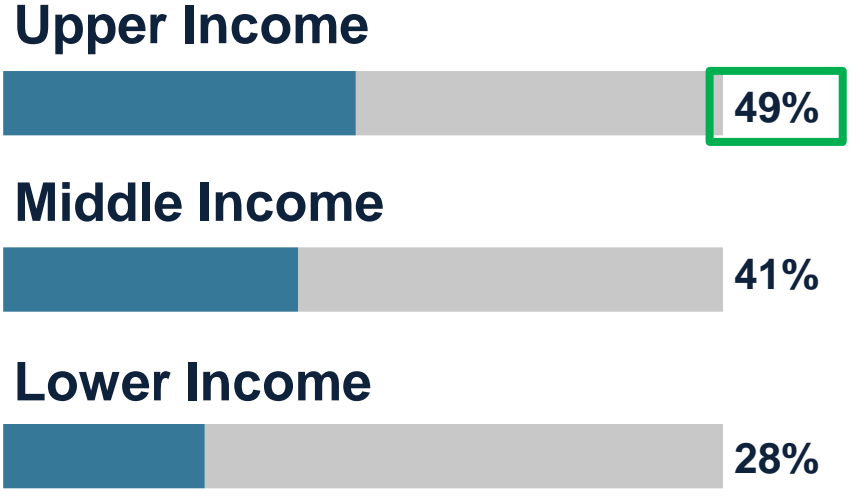
By Gender



By Generation



By Income Level



Shopping Habits



The Vast Majority Of People Shop During Ramadan. Although, This Is More Noticeable Among Affluent Females

9 in 10
Shop During Ramadan

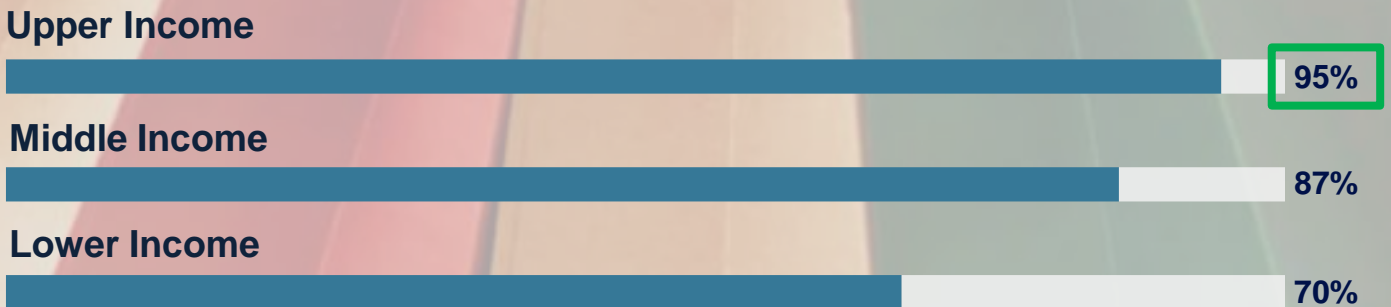
By Gender



By Generation



By Income Level



Deals And Offers 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



25%

Attractive Promotions & Discounts



20%

To Host Guests for Iftar & Suhoor



13%

To Buy Gifts for Eid



10%

Wide Variety of Products



10%

To Buy Home Improvement Products



7%

Availability of Limited-Edition Products



6%

Free Delivery & Installation



6%

Easy Returns & Exchange Policy



3%

Easy Payment Options

Promotions & Discounts Highly Motivate The Lower Income Group Whereas Hosting Guests Is More Likely To Encourage Gen X To Shop

Motivations To Shop During Ramadan



Attractive Promotions & Discounts



To Host Guests for Iftar & Suhoor



To Buy Gifts for Eid



Wide Variety of Products



To Buy Home Improvement Products



Availability of Limited-Edition Products



Free Delivery & Installation



Easy Returns & Exchange Policy



Easy Payment Options

	Attractive Promotions & Discounts	To Host Guests for Iftar & Suhoor	To Buy Gifts for Eid	Wide Variety of Products	To Buy Home Improvement Products	Availability of Limited-Edition Products	Free Delivery & Installation	Easy Returns & Exchange Policy	Easy Payment Options
Total	25%	20%	13%	10%	10%	7%	6%	6%	3%
Male	26%	18%	14%	13%	7%	8%	5%	5%	2%
Female	25%	21%	13%	8%	12%	6%	6%	6%	4%
Generation Z	20%	18%	17%	11%	10%	6%	7%	7%	5%
Millennials	27%	19%	12%	10%	10%	7%	6%	6%	3%
Generation X	22%	24%	17%	12%	10%	7%	3%	3%	-
Upper Income	26%	20%	14%	10%	10%	5%	5%	6%	2%
Middle Income	23%	20%	13%	10%	10%	7%	6%	6%	3%
Lower Income	35%	12%	15%	12%	6%	9%	6%	-	6%

In Terms Of Categories Purchased During The Holy Month, The Market Is Fragmented With Food & Groceries Taking The Lead



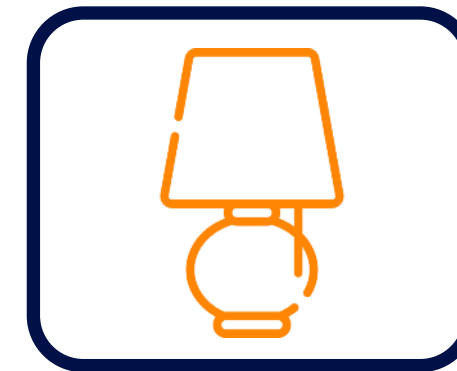
Categories Purchased During Ramadan



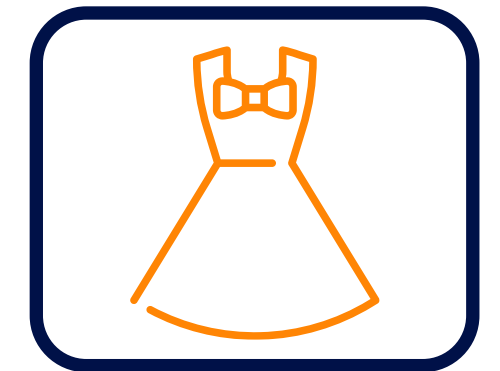
38%
Food & Groceries



34%
Electronics



32%
Home Items



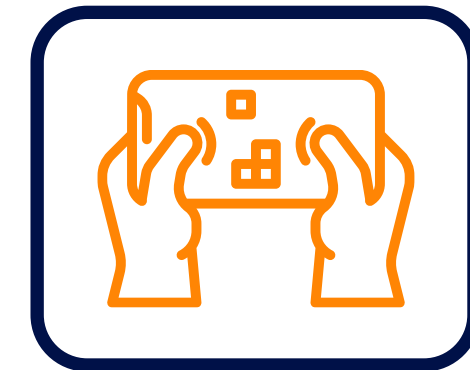
31%
Fashion Items



28%
Beauty Products



23%
Travel



12%
Gaming Products

Gen Z Highly Purchase Electronics While Gen X Are More Likely To Purchase Beauty Products

Categories Purchased During Ramadan



Food & Groceries



Electronics



Home Items



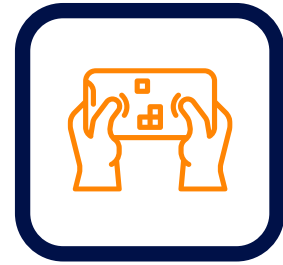
Fashion Items



Beauty Products



Travel



Gaming Products

	Food & Groceries	Electronics	Home Items	Fashion Items	Beauty Products	Travel	Gaming Products
Total	38%	34%	32%	31%	28%	23%	12%
Male	38%	35%	29%	33%	26%	24%	16%
Female	39%	34%	35%	30%	30%	21%	10%
Generation Z	38%	41%	28%	34%	30%	20%	9%
Millennials	39%	34%	33%	31%	27%	22%	12%
Generation X	35%	29%	35%	27%	33%	27%	16%
Upper Income	35%	32%	33%	32%	29%	24%	15%
Middle Income	42%	34%	31%	31%	31%	21%	10%
Lower Income	36%	56%	36%	32%	8%	24%	8%

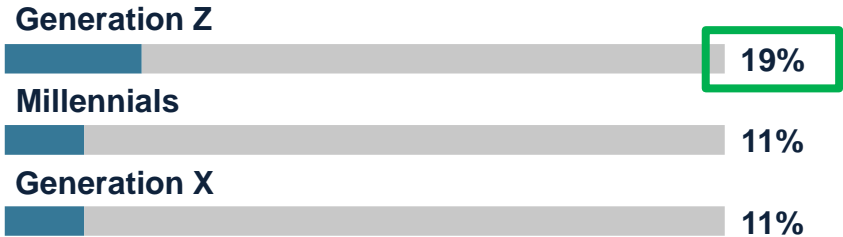
6 In 10 Utilize Both Online And Offline Channels To Purchase Groceries, Especially The Affluent Youth. Sole Online Grocery Shopping Is Higher Amongst The Youth With Lower Income Whereas The In-store Experience Is Preferred By Males Of The Lower Income Bracket For Grocery Shopping

 **12%**
Buy Groceries Online During Ramadan

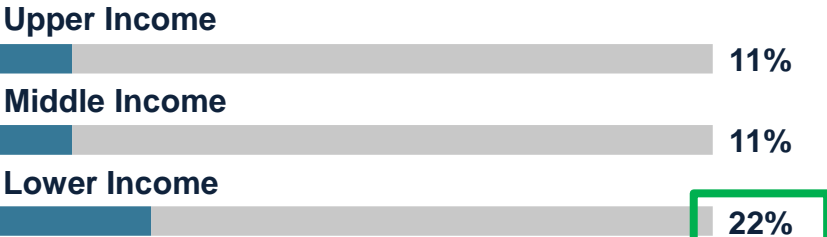
By Gender



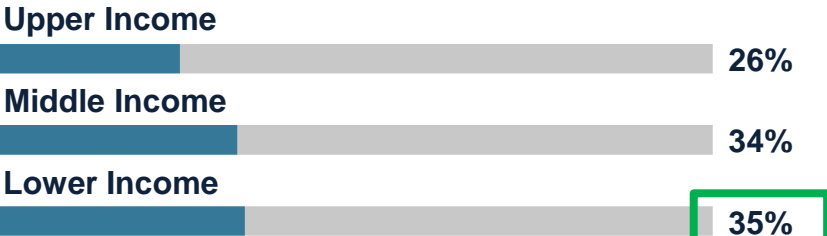
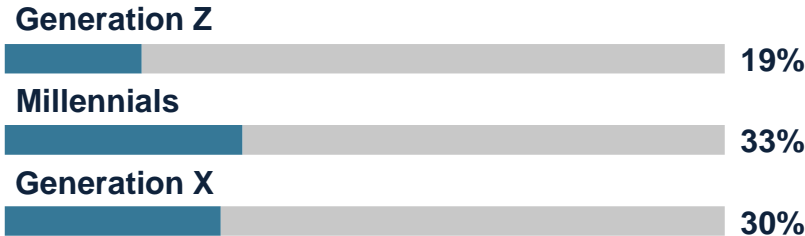
By Generation



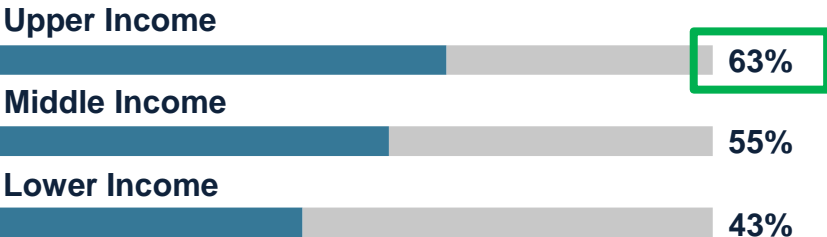
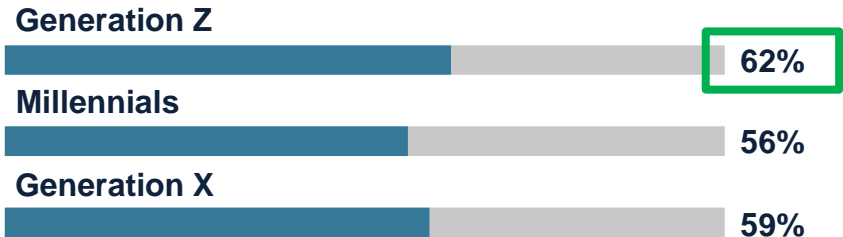
By Income Level



 **30%**
Buy Groceries In-Store During Ramadan



 **57%**
Buy Groceries Online & In-Store During Ramadan



General Shopping Apps And Those For Groceries Have Witnessed A Growth In Usage During Ramadan



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 Belong To Gen Z



46%

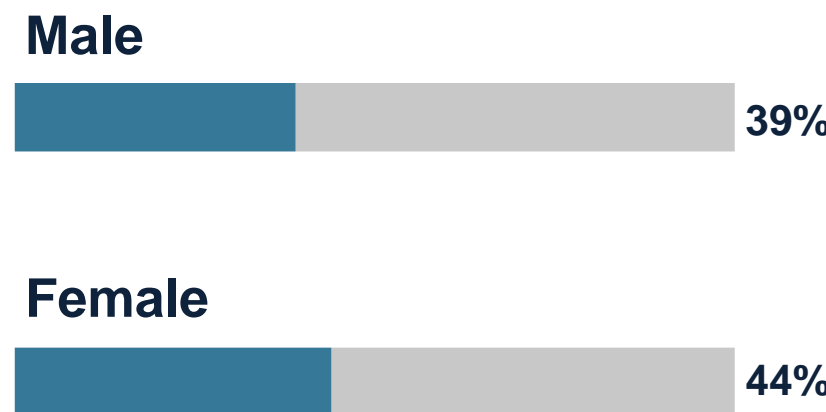
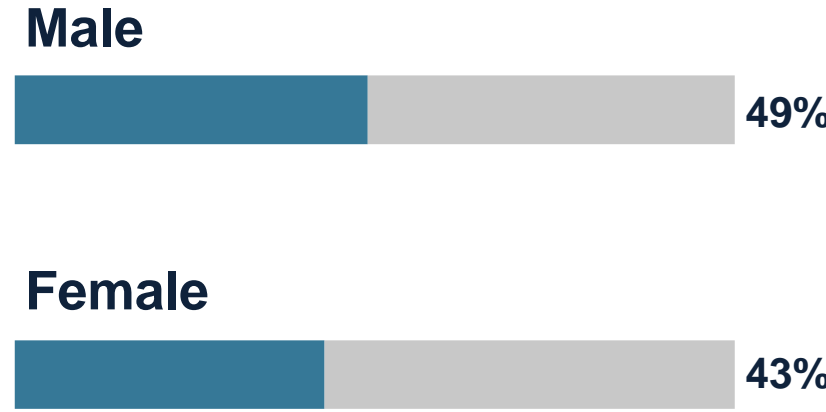
Increased Online Grocery Store App Usage



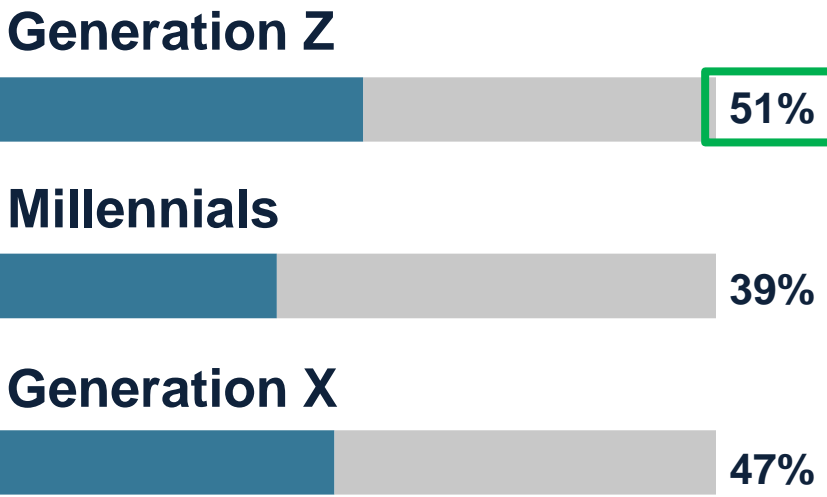
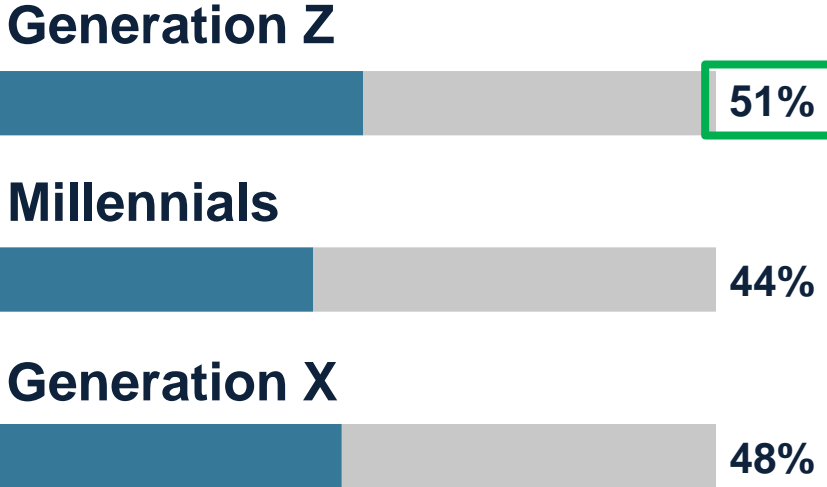
42%

Increased Online Shopping App Usage

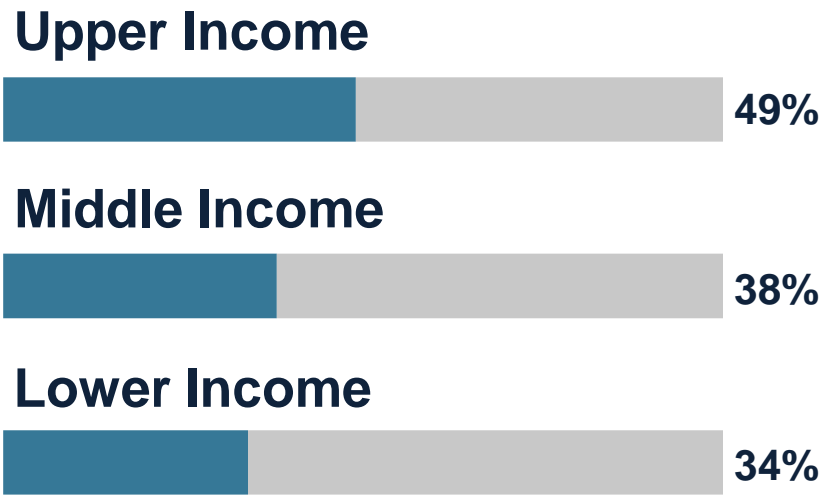
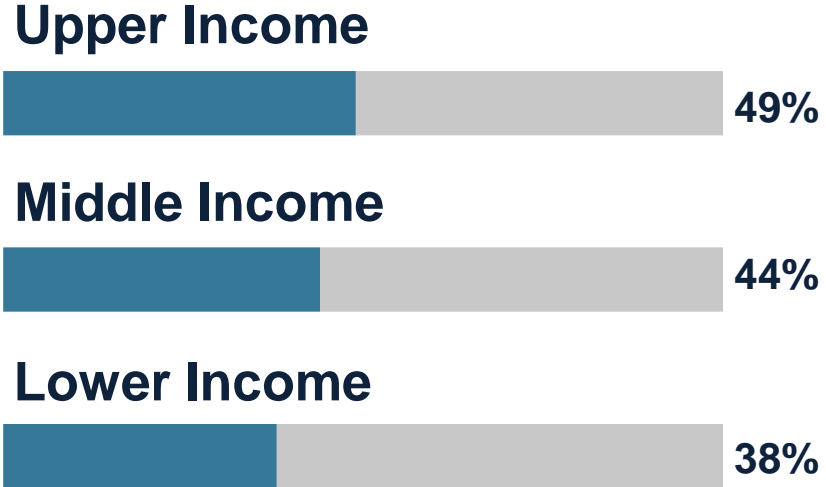
By Gender



By Generation



By Income Level



People Mostly Learn About The Categories They Shop For On Social Media And E-commerce Websites/ Apps

Sources Of Awareness For Categories Purchased During Ramadan



56%

Social Media



48%

E-Commerce Websites/Apps



43%

In Store Ads



40%

Friend/Family Recommendation



39%

Brand's Website



37%

Online Search Engines



34%

TV Advertisement



33%

Internet Advertisement



33%

Ramadan Post by an Influencer









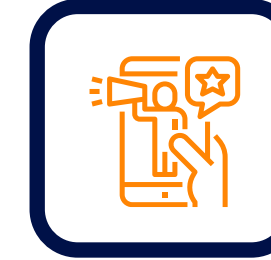



33%

Offer via Retail Membership

Gen X Are More Inclined To Learn About The Categories They Shop For From E-commerce Websites/ Apps While Affluent People Highly Learn Through Word Of Mouth

Sources Of Awareness For Categories Purchased During Ramadan

	 Social Media	 E-Commerce Websites/ Apps	 In Store Ads	 Friend/Family Recommendation	 Brand's Website	 Online Search Engines	 TV Advertisement	 Internet Advertisement	 Ramadan Post by an Influencer	 Offer via Retail Membership
Total	56%	48%	43%	40%	39%	37%	34%	33%	33%	33%
Male	51%	51%	41%	39%	43%	40%	38%	35%	33%	30%
Female	59%	45%	45%	42%	37%	34%	32%	31%	32%	35%
Generation Z	52%	46%	45%	37%	41%	38%	29%	24%	35%	35%
Millennials	56%	47%	43%	41%	36%	34%	35%	35%	30%	32%
Generation X	59%	55%	43%	45%	50%	48%	38%	32%	45%	36%
Upper Income	60%	52%	46%	46%	44%	40%	34%	38%	34%	38%
Middle Income	55%	45%	41%	36%	35%	36%	36%	28%	33%	28%
Lower Income	38%	34%	41%	28%	31%	28%	22%	31%	19%	31%

In Ramadan, Shopping Behavior Is Generally Split In Terms Of Planning Nature, Nonetheless The Lower Income Group Are More Likely To Plan Their Purchases While Gen Z Are More Inclined To Shop Impulsively



51%

Make Planned Purchases

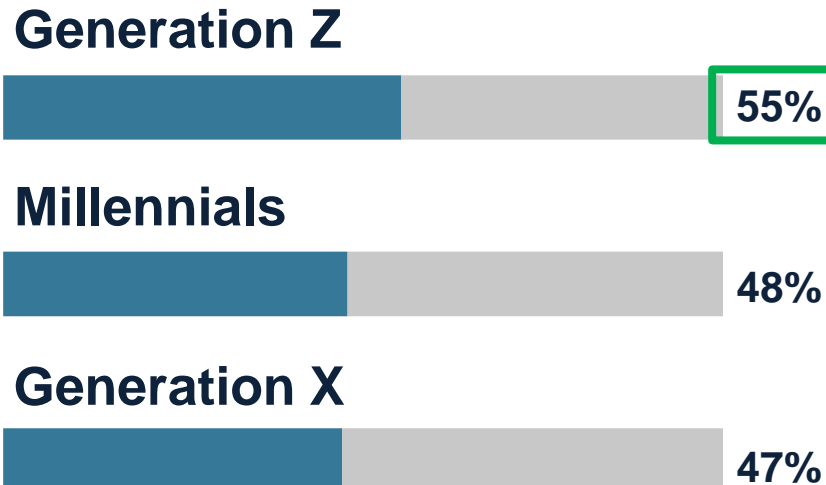
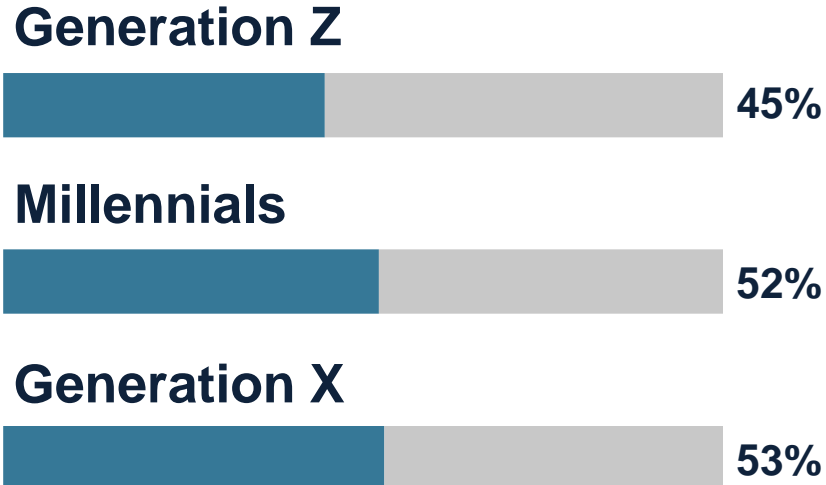
By Gender



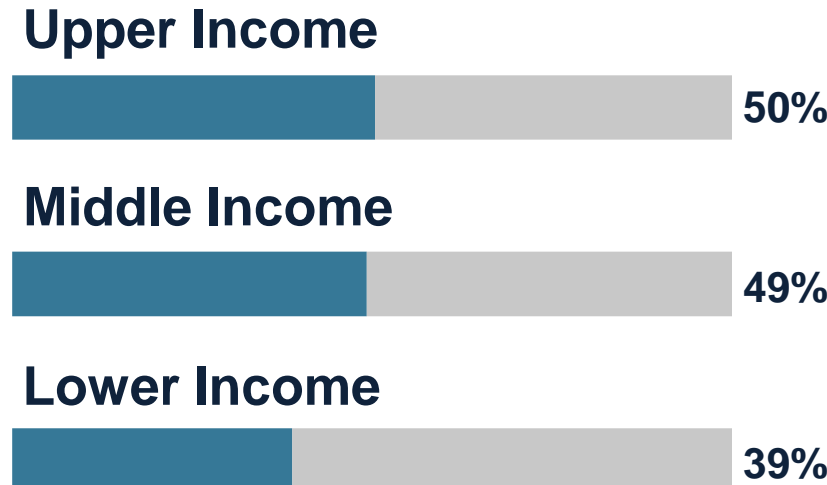
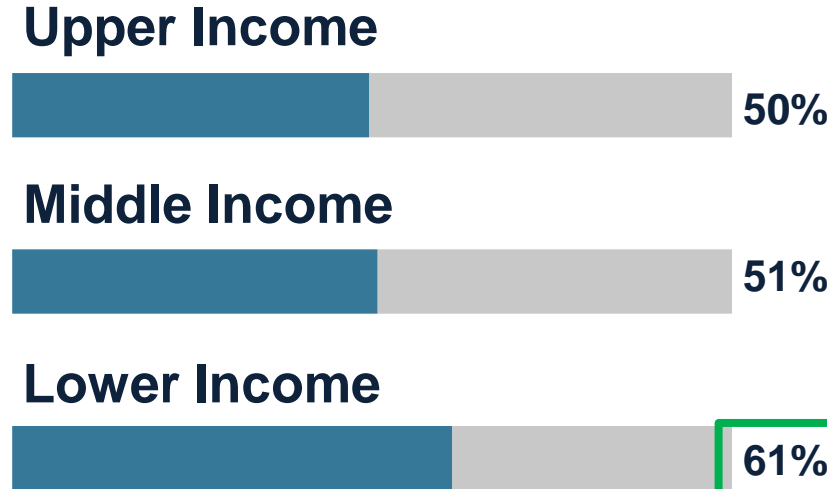
49%

Make Unplanned Purchases

By Generation



By Income Level



Home Item Purchases Are More Likely To Be Planned While Gaming-related Purchases Tend To Be More Impulsive



Food & Groceries



Electronics



Home Items



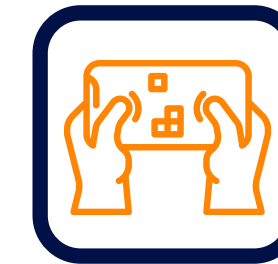
Fashion Items



Beauty Products



Travel



Gaming Items



51%

Make
Planned
Purchases

52%

52%

60%

51%

50%

51%

43%



49%

Make
Unplanned
Purchases

48%

48%

40%

49%

50%

49%

57%

Planning Tends To Exist In The Form Of Wish Lists And Is Also Heavily Done When It Comes To Big Purchases, Where Big Purchase Planning Is Highly Done By Young Affluent Males



75%

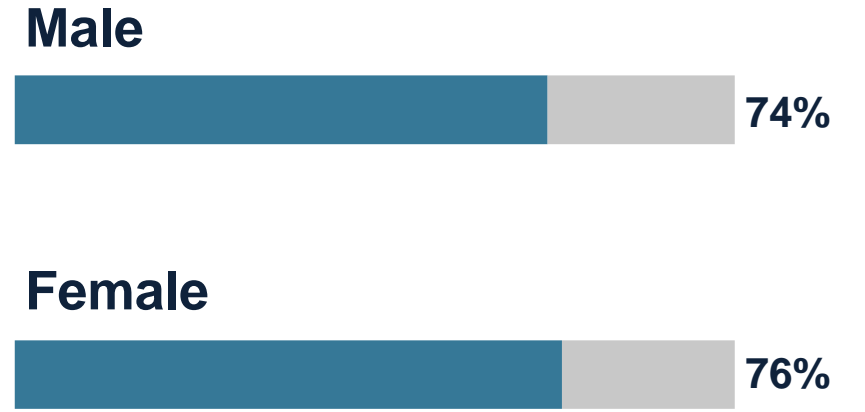
Have A Planned Wishlist For Shopping During Ramadan



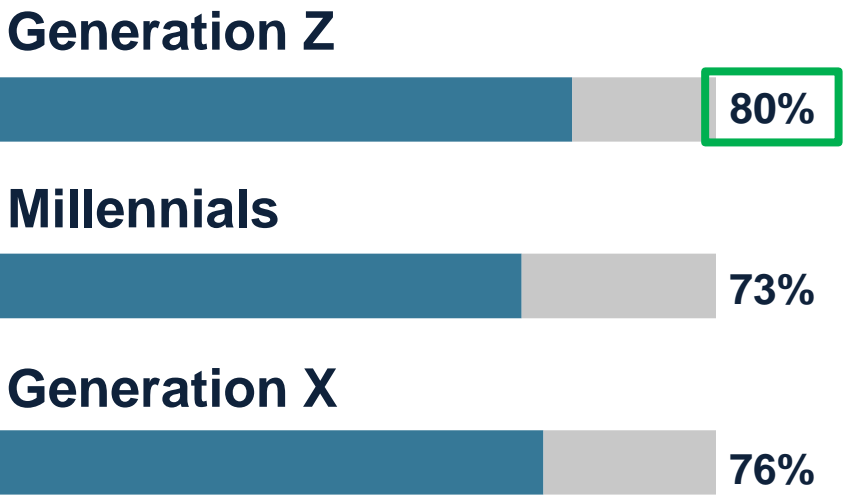
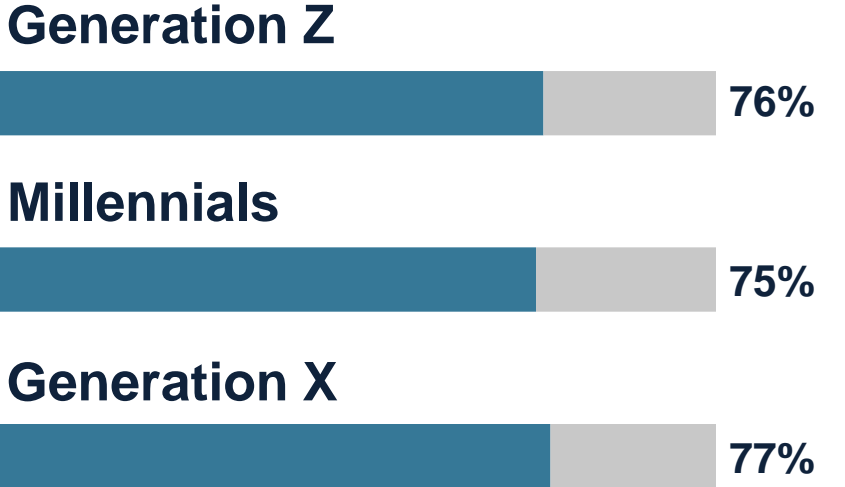
74%

Plan & Research High Value Purchases

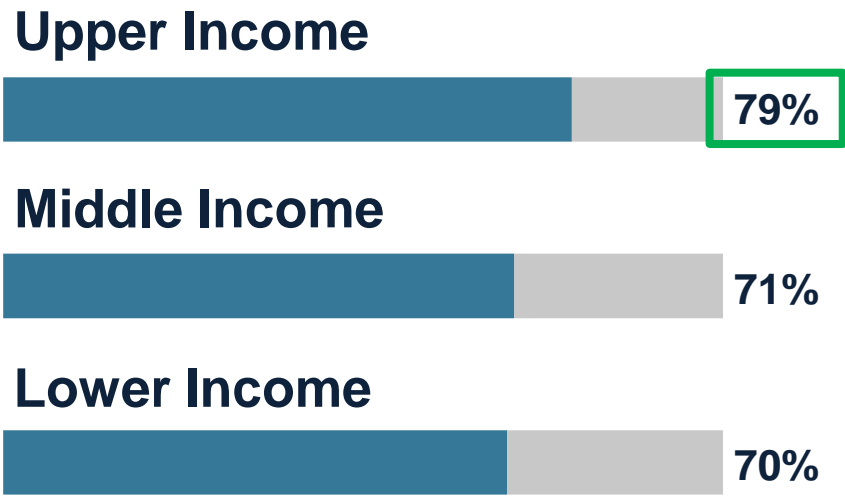
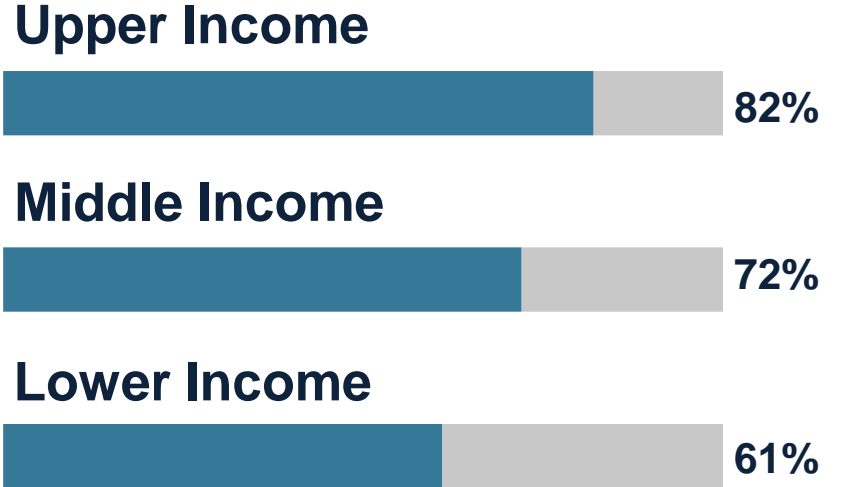
By Gender



By Generation



By Income Level

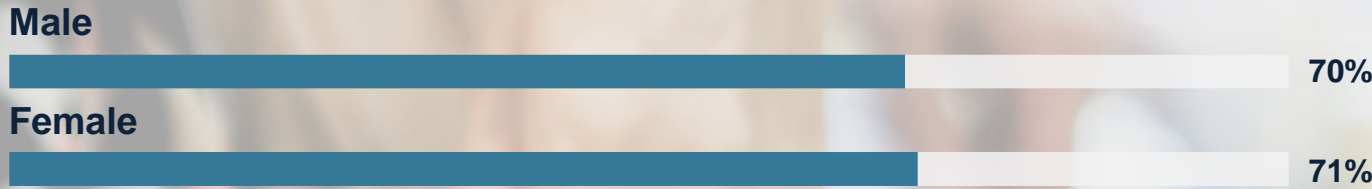


Ramadan Is Also A Time For Exploration, Where 7 In 10 Discover New Products. This Is More Prevalent Among People With Higher Income

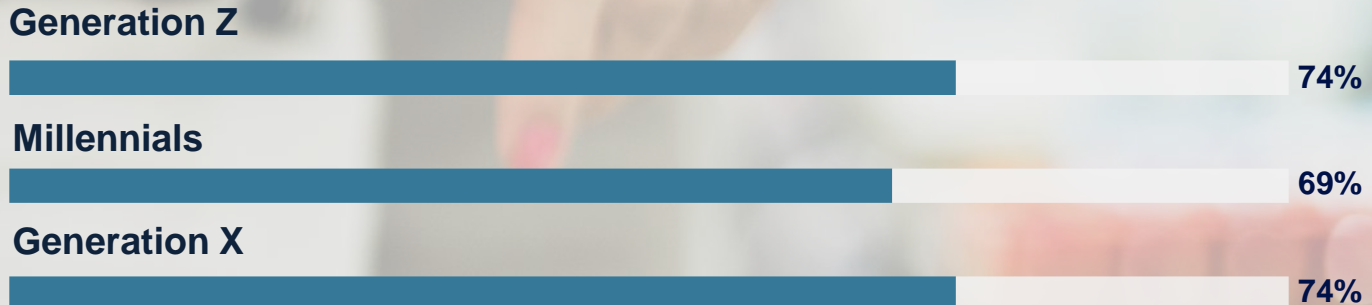
71%

Discover New Products During Ramadan

By Gender



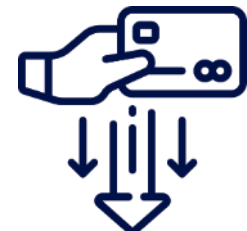
By Generation

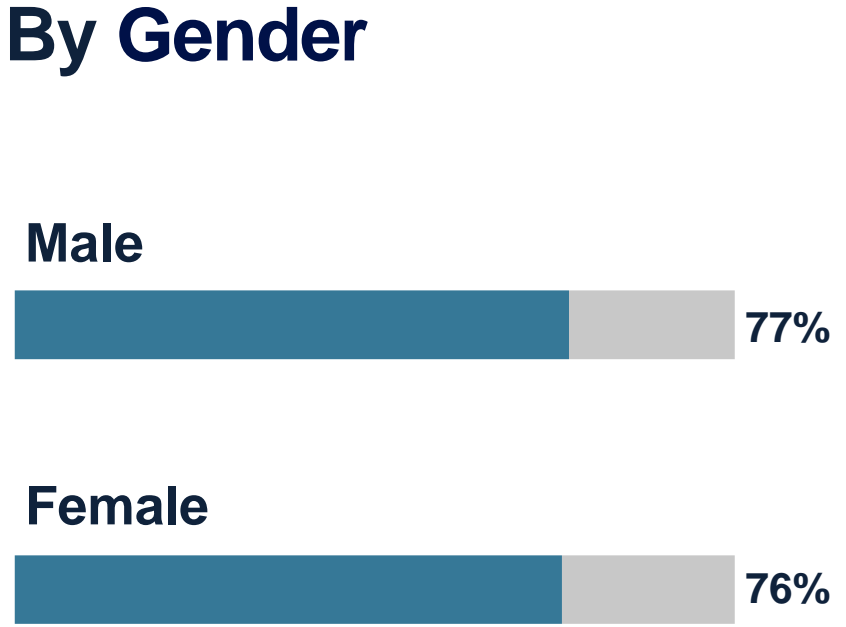



By Income Level

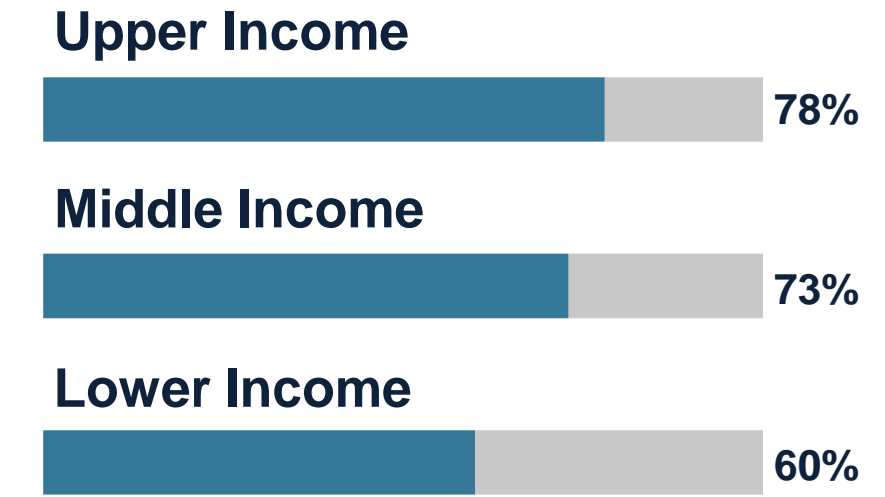
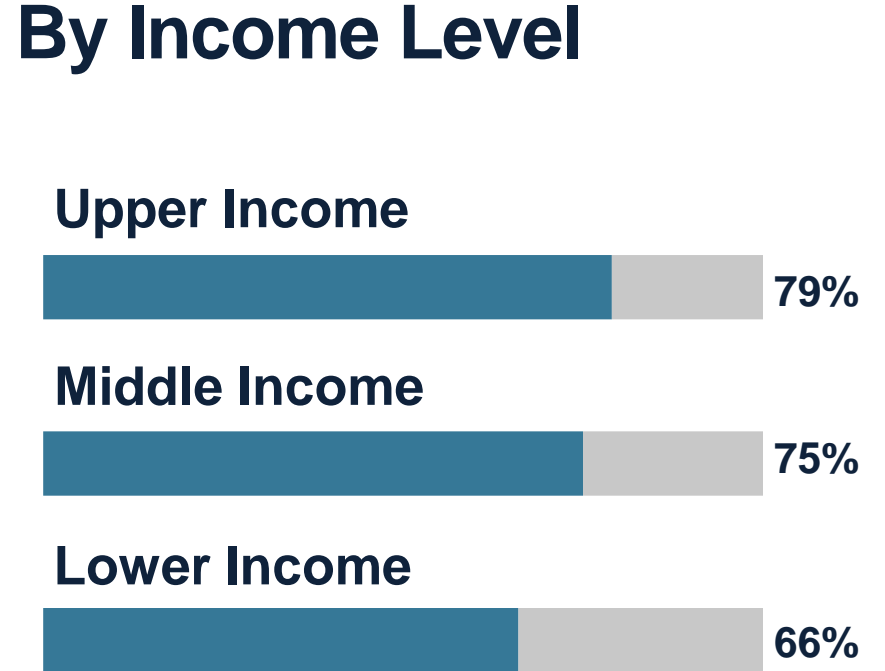
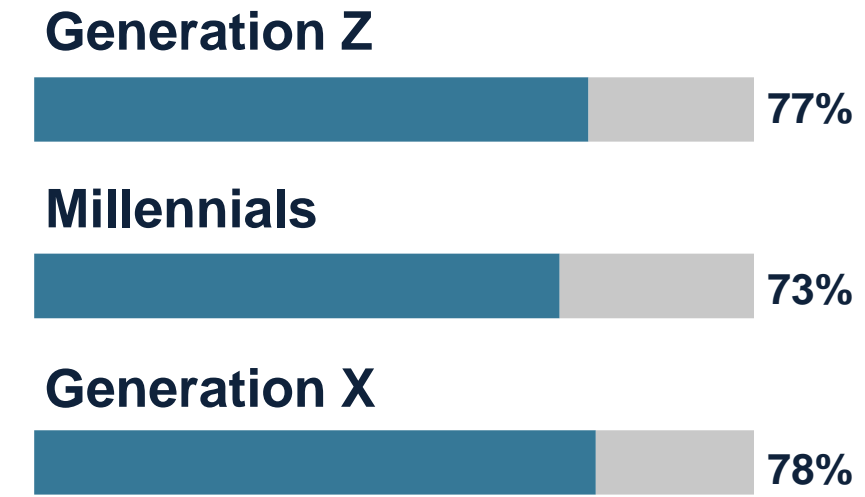
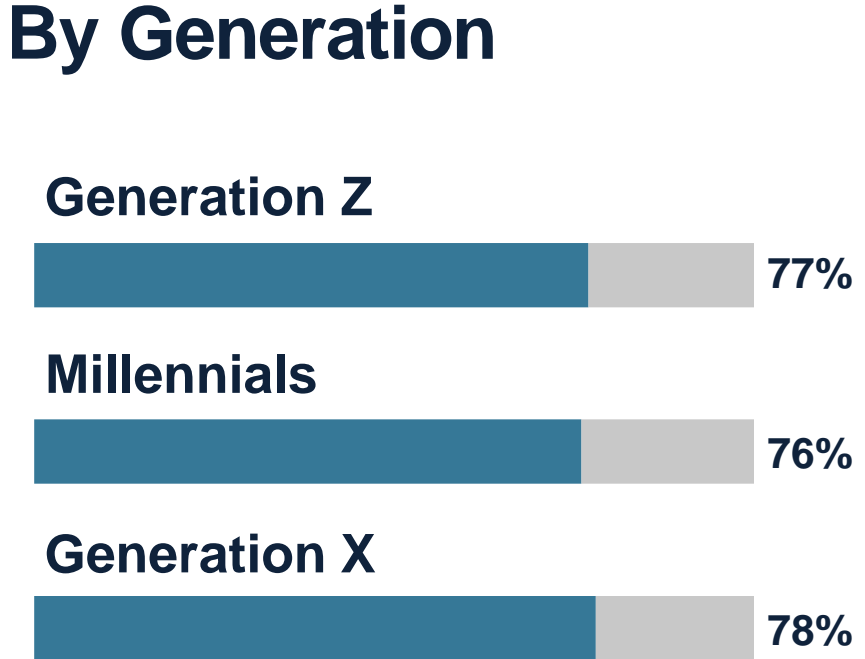
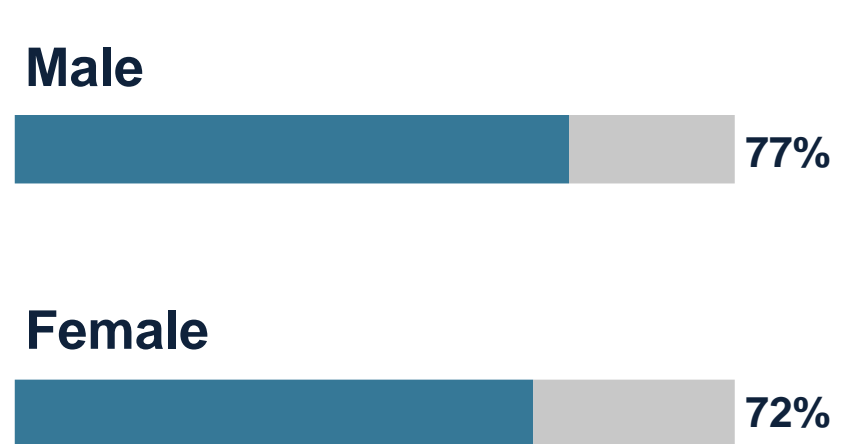


As People Discover New Products, It's Unsurprising That They End Up Spending More Than Planned

 **76%**
Spend More Than Originally Planned



 **74%**
Buy More Than Planned



Average Expenditure Is The Highest For Travel And Electronics And Lowest For Beauty Products



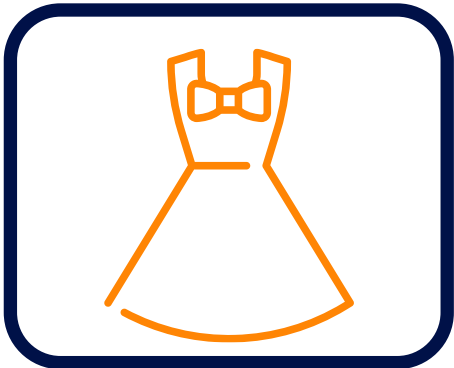
Expenditure Per Category Purchased During Ramadan (SAR)



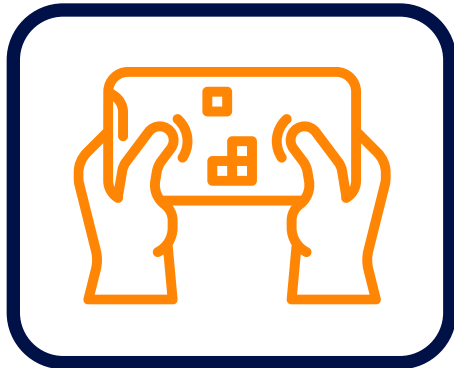
3157.9
Travel



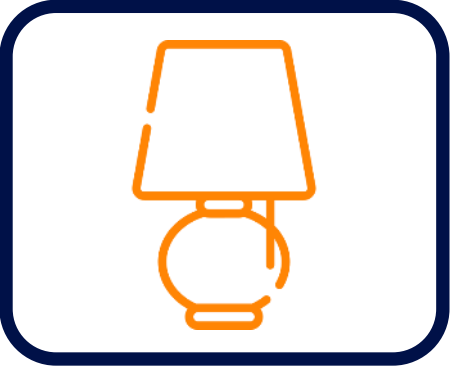
1256.6
Electronics



960.8
Fashion Items



764.2
Gaming Products



755.3
Home Items



728.4
Food & Groceries



481.5
Beauty Products

Almost Everyone Plans Their Eid Gifts During Ramadan And This Is More Prevalent Amongst Millennials

9 in 10
Plan Their Eid
Gifts In Ramadan

By Gender



By Generation



By Income Level



Planned Shopping Lists For Eid Mostly Include Desserts & Chocolates As Well As Clothing For Gifts



Eid Shopping Lists



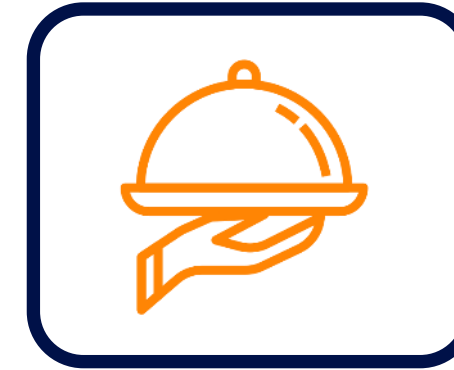
55%

Desserts &
Chocolates



47%

Clothing &
Fashion



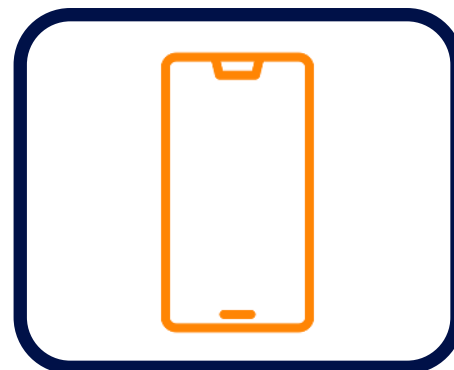
33%

Food &
Beverage



31%

Beauty
Products



28%

Mobile
Phones



22%

Household
Products



21%

Kitchen
Appliances



20%

Home
Appliances



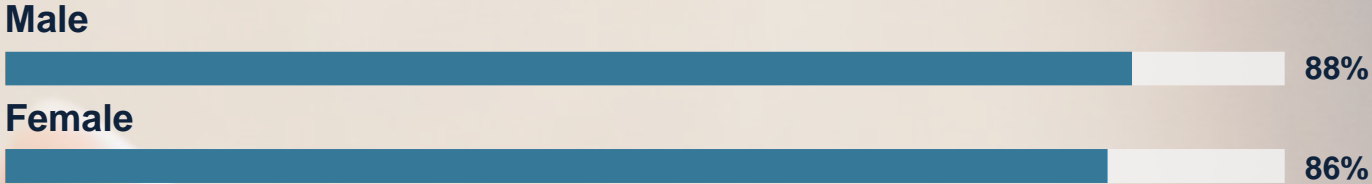
Food Delivery

Food Delivery Is Quite Popular In Ramadan, Where Almost 9 In 10 Order Through Apps And This Is Significantly Higher For The Upper Income Group

87%

Order Food From Delivery Apps

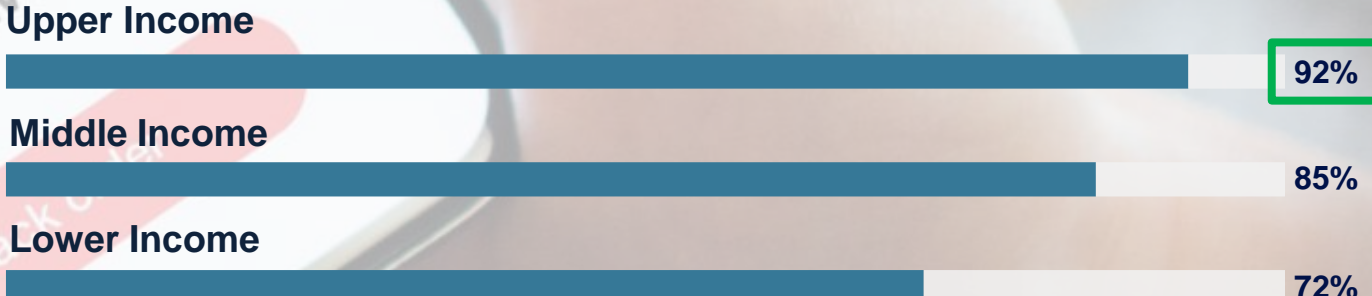
By Gender



By Generation



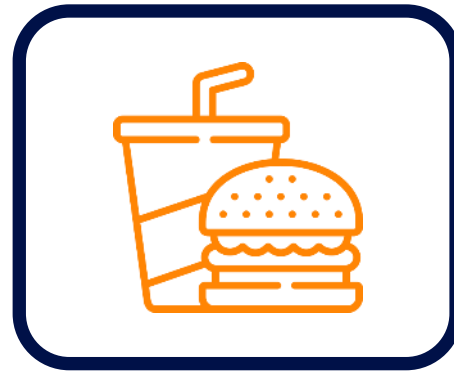
By Income Level



Despite Fast Food Being The Most Picked, People In Ramadan Do Not Stick To One Type Of Food When Ordering Delivery



Food Types Ordered



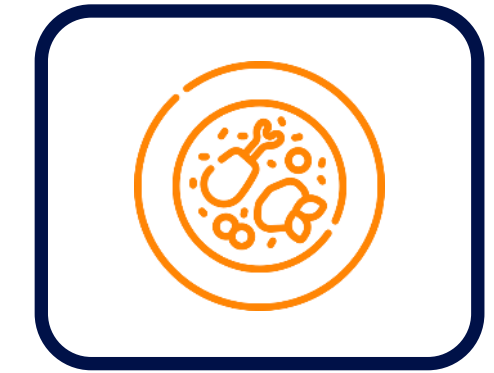
55%
Fast Food



49%
Desserts



48%
Healthy Meals



47%
Traditional Arab
Food



41%
Fruits



41%
Soups/
Starters











35%
Traditional Food
From Home Country



30%
Food That Is
Low In Salt

While Affluent People Highly Order Delivery For Many Food Types, Males Prefer Arab Food While Gen Z Highly Order Sweets/ Fruits

<u>Food Types Ordered</u>								
	Fast Food	Desserts	Healthy meals	Traditional Arab Food	Fruits	Soups/ Starters	Traditional Food From Home Country	Food That Is Low In Salt
Total	55%	49%	48%	47%	41%	41%	35%	30%
Male	50%	44%	46%	52%	47%	43%	37%	28%
Female	58%	53%	49%	42%	37%	41%	33%	31%
Generation Z	56%	56%	45%	34%	48%	45%	34%	24%
Millennials	55%	46%	46%	47%	39%	42%	37%	31%
Generation X	50%	54%	59%	63%	43%	33%	24%	28%
Upper Income	59%	55%	51%	53%	46%	43%	38%	35%
Middle Income	51%	44%	47%	41%	37%	42%	30%	24%
Lower Income	48%	39%	26%	43%	39%	26%	43%	26%



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



29%
Mainly Order
For Iftar



28%
Mainly Order
For Suhoor



43%
Order
For Both

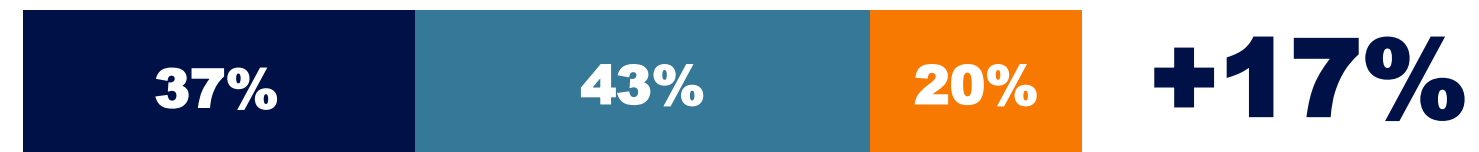
Not Only Do People Use Food Delivery Apps More Often In Ramadan, But They Also Show Higher Usage Of Grocery Delivery Apps



Delivery App Usage During Ramadan



Grocery Delivery App Usage



Food Delivery App Usage



■ Increased ■ No Change ■ Decreased

The Lower Income Group Are More Likely To Have An Increased Usage Of Grocery Delivery Apps While The Usage Of Food Delivery Apps Is Higher Among Affluent People. However, Millennials Are Less Inclined To Use Food Delivery Apps More Frequently During Ramadan

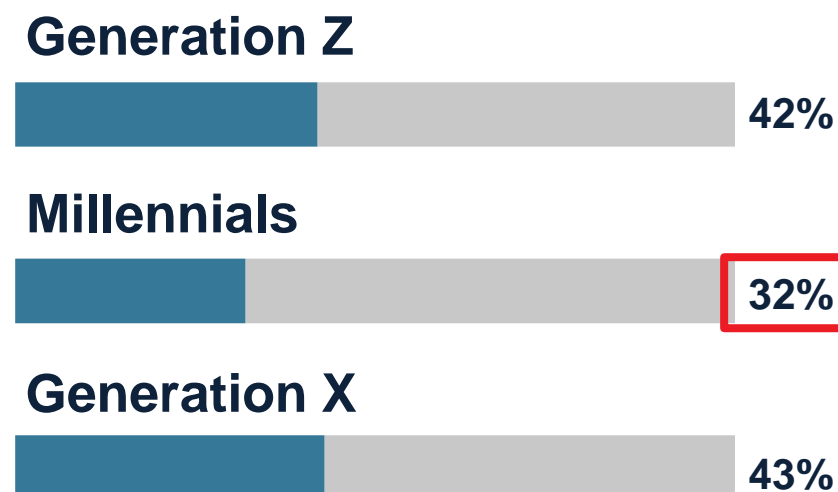
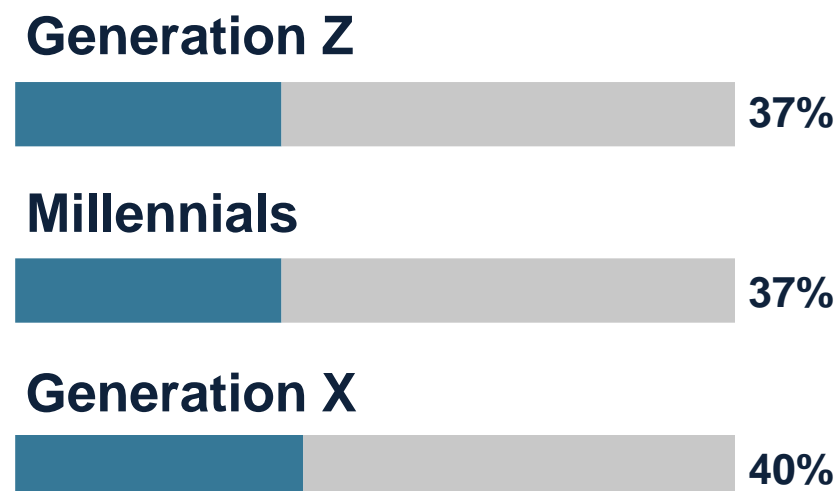
 **37%**
Increased Grocery Delivery App Usage

 **36%**
Increased Food Delivery App Usage

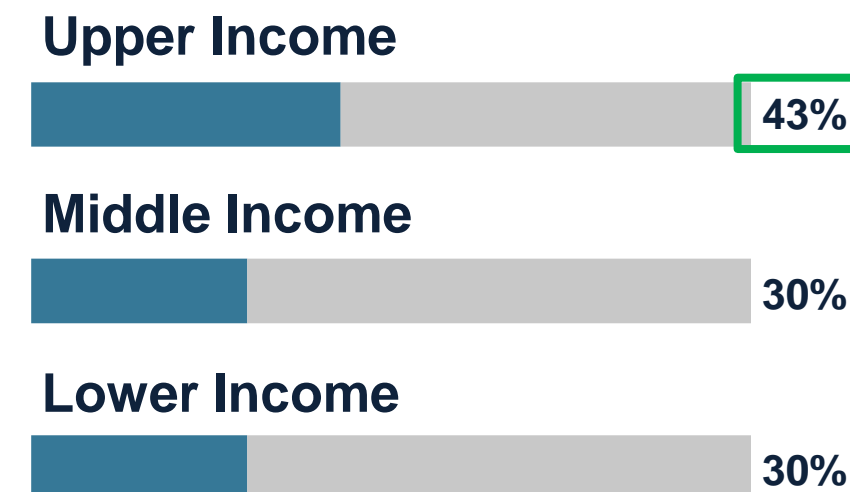
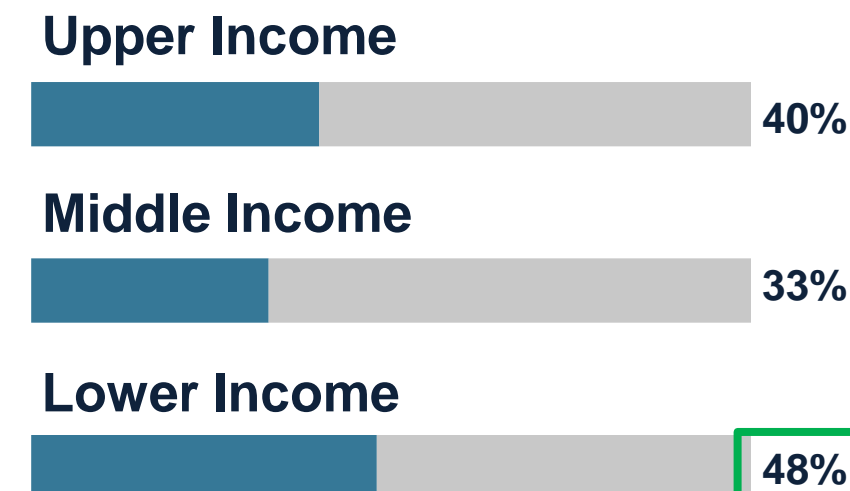
By Gender



By Generation



By Income Level



Media Consumption

*This section is based on syndicated RDM and TLM studies

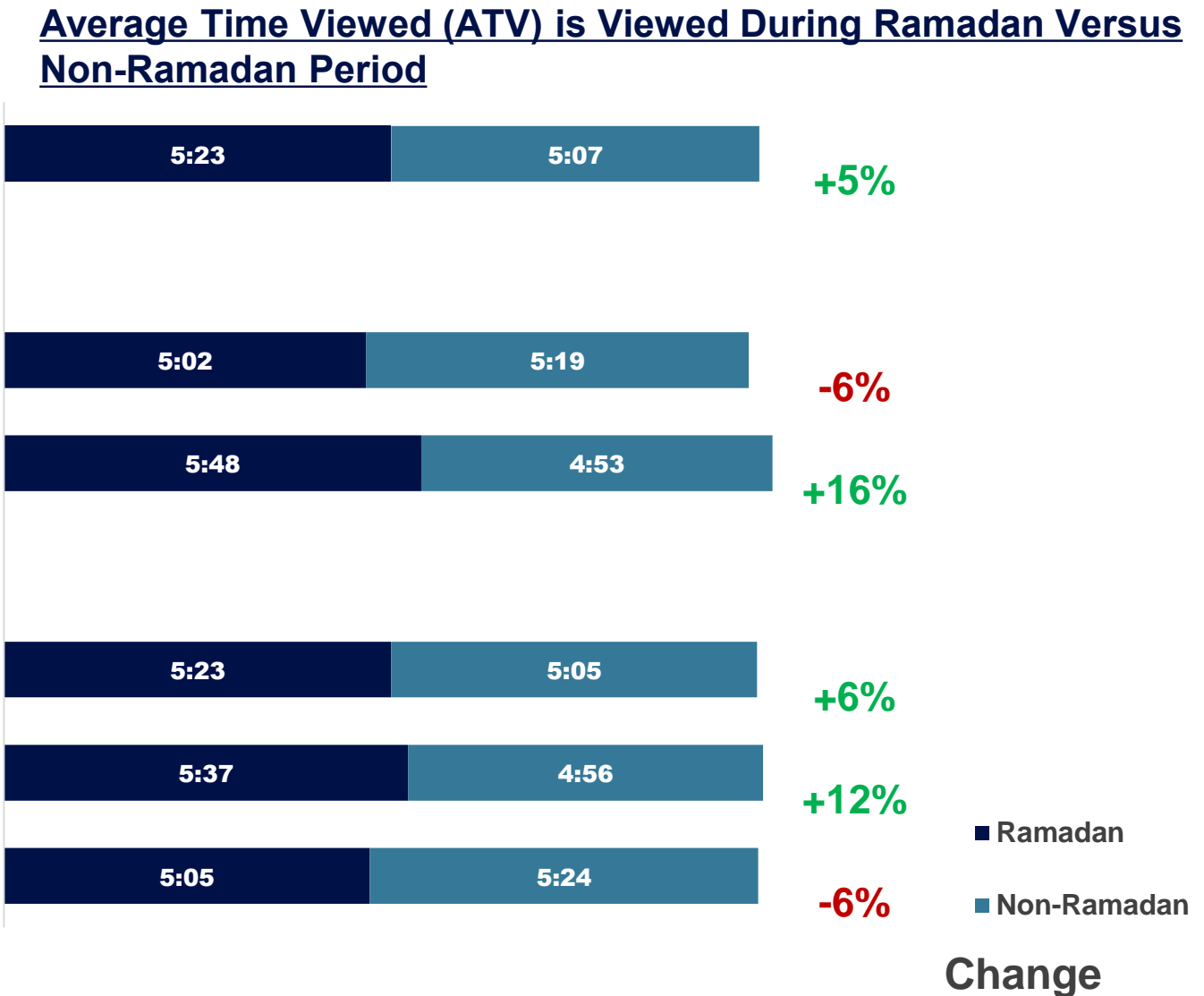


97% Of Locals And Arabs In KSA Tune To The TV During Ramadan, Especially Females Daily. Viewers Typically Watch TV For 5 Hours And 23 Minutes Per Day During The Holy Month, 16 Minutes Longer Than During Non-ramadan Times



TV Viewers Reach During Ramadan

Total	97%
Male	96%
Female	98%
Generation Z	97%
Millennials	96%
Generation X	97%



Based on Ipsos RDM Study 2022: 6,200 respondents/ wave

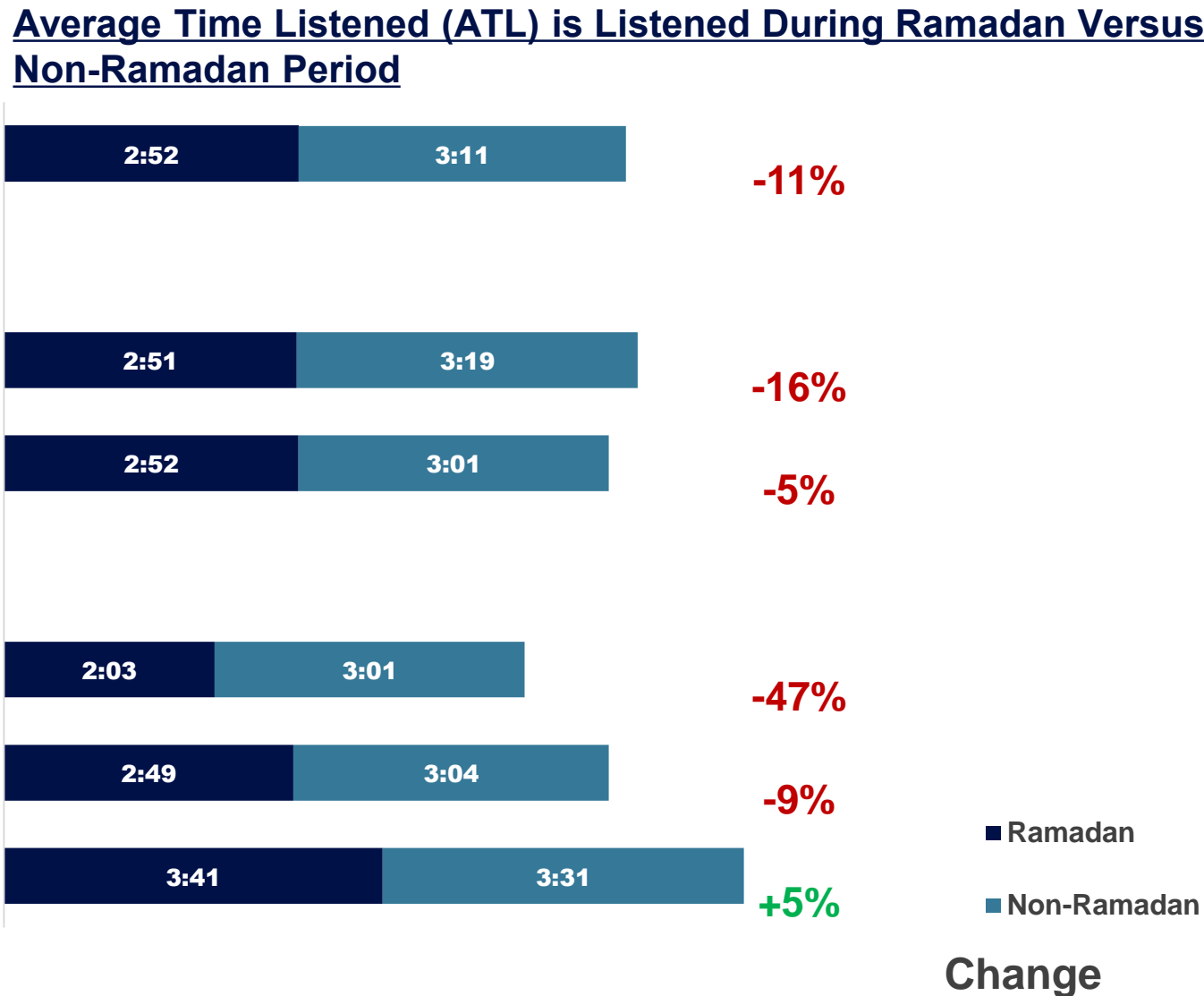


On An Average Day During Ramadan, Radio Reaches 82% Of Locals And Arabs In KSA, Primarily Generation X. Radio Listeners Tune In For 2 Hours And 52 Minutes On Average Per Day, 19 Minutes Fewer Than On Non-Ramadan Days



Radio Listeners Reach During Ramadan

Total	82%
Male	85%
Female	79%
Generation Z	64%
Millennials	86%
Generation X	95%



Based on Ipsos RDM Study 2022: 2,800 respondents/ wave

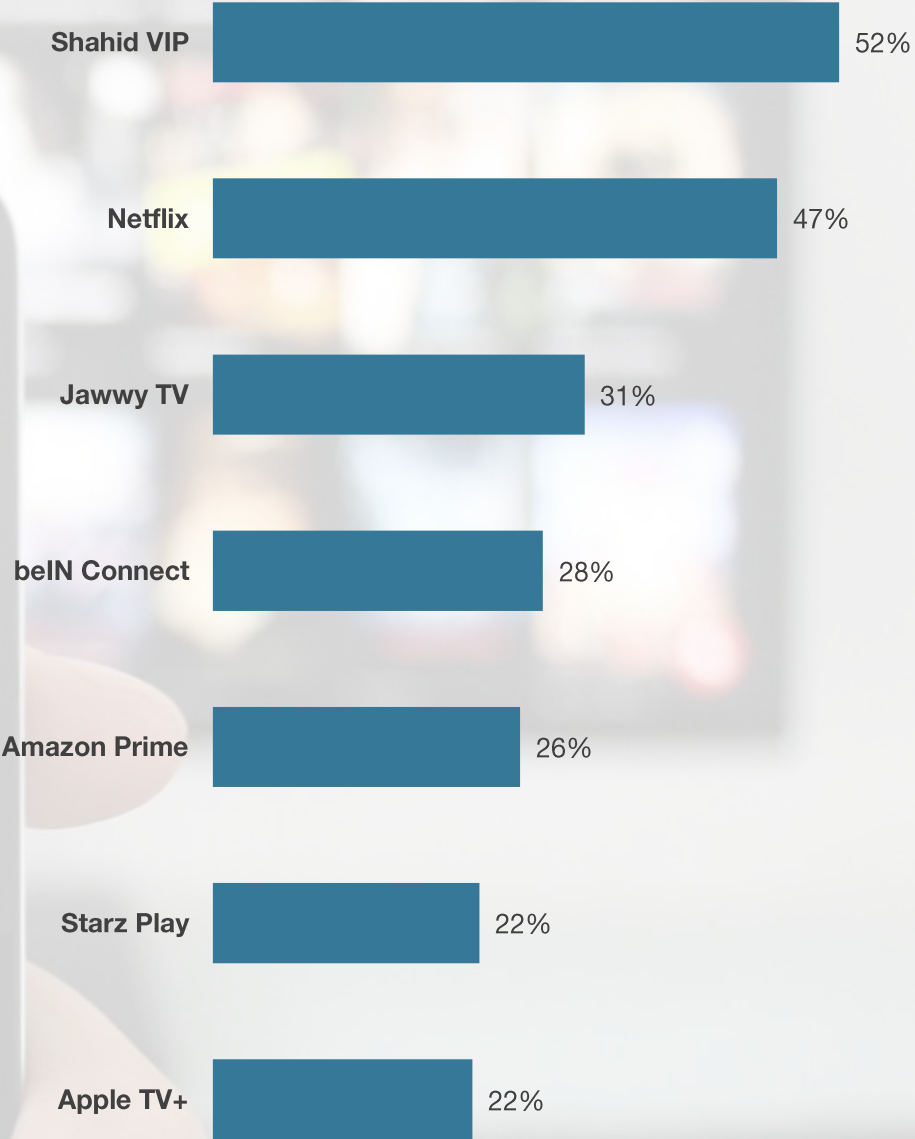


Around 8 In 10 People Consume SVOD During Ramadan, With Shahid VIP And Netflix Being The Top Used Platforms

79%

Consume video streaming platforms during Ramadan

TOP SVOD PLATFORMS USED



Around 65% Of Video Streaming Platform Users Tend To Resort To These Mediums Due To Their Easy Accessibility Feature At Anytime And Everywhere. Having No Ad Breaks Is Also A Major Reasoning For SVOD Subscriptions Over Other Content Providing Mediums...

MAIN REASONS FOR SVOD USAGE DURING RAMADAN



65%

Available anytime and anywhere



59%

No ad breaks



56%

Special Offers



56%

Availability of latest content



52%

Offers safe content



49%

Wide variety of Arabic content



48%

Availability of Ramadan content



48%

Wide variety of kids' content



45%

Recommended

During Ramadan, People Mainly Consume Arabic Series And Religious Content On Video Streaming Platform

Content and Genre Consumed During Ramadan On Video Streaming Platforms



49%
Arabic Series



38%
Religious Content



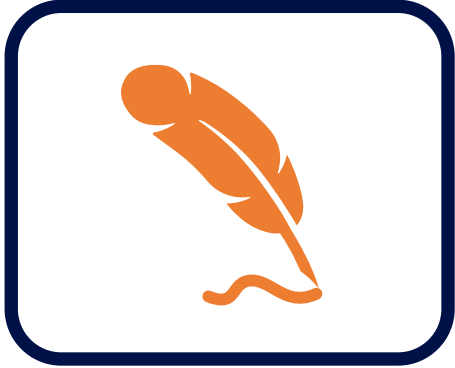
29%
Sports



28%
Kids Content



26%
Arabic Movies



24%
Documentaries

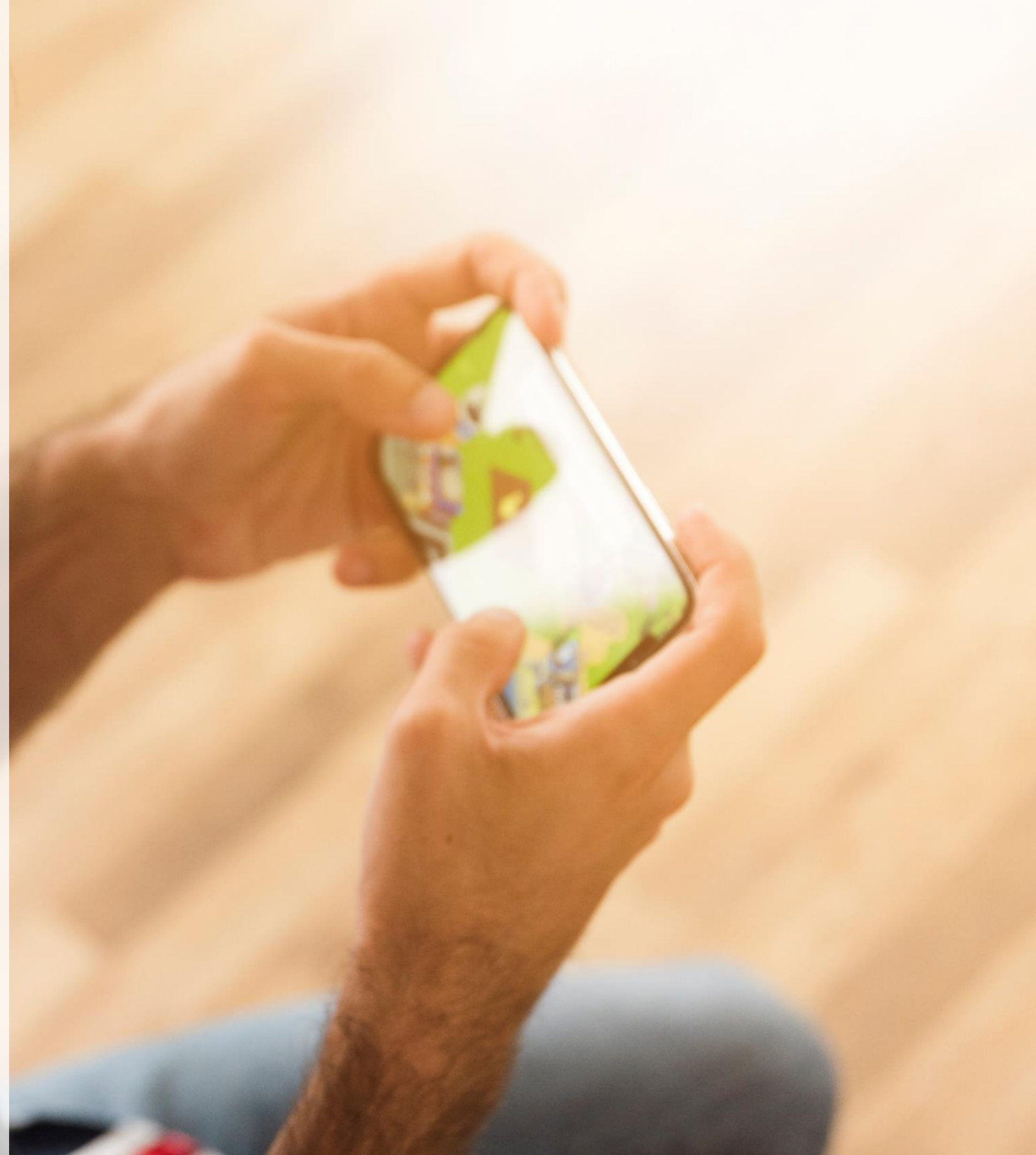


23%
News and Current Affairs

Based on Ipsos OTT Ramadan 2022 Study : 1,000 respondents

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



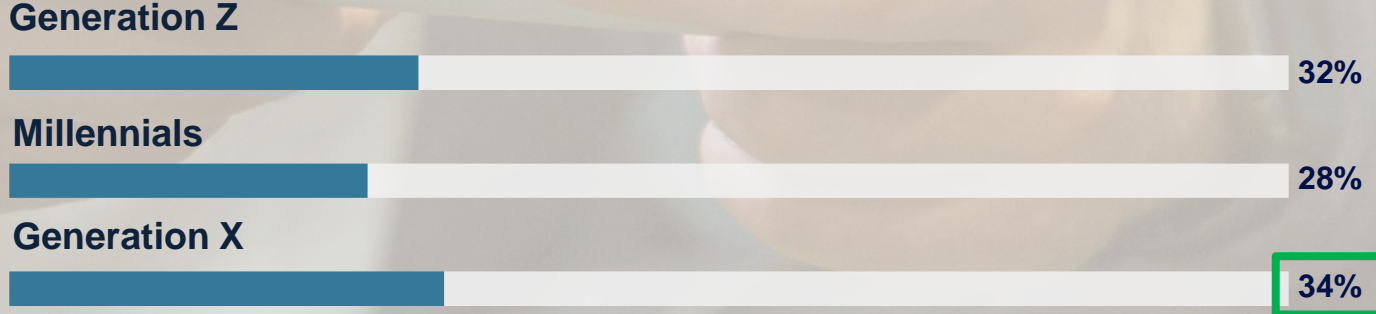
Mobile Games Are Played By 3 In 10 Individuals Where This More Common Among Affluent Older Generations

29%
Play Mobile Games

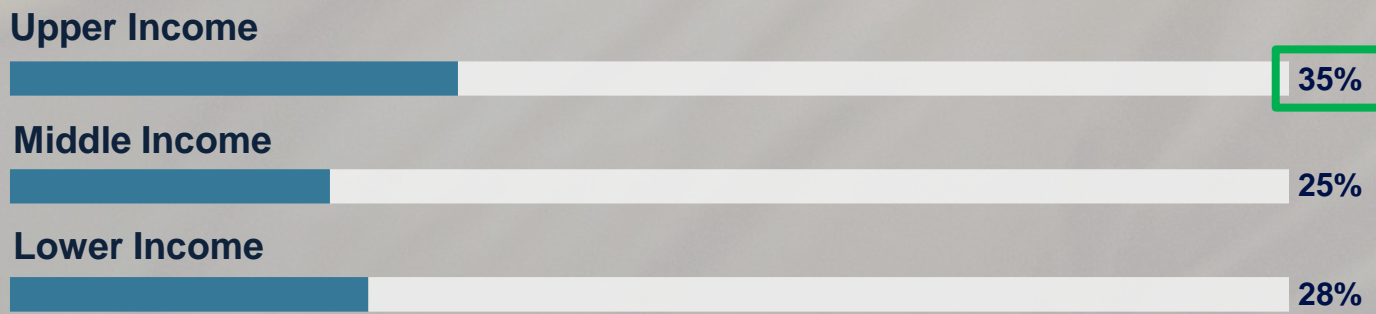
By Gender



By Generation



By Income Level

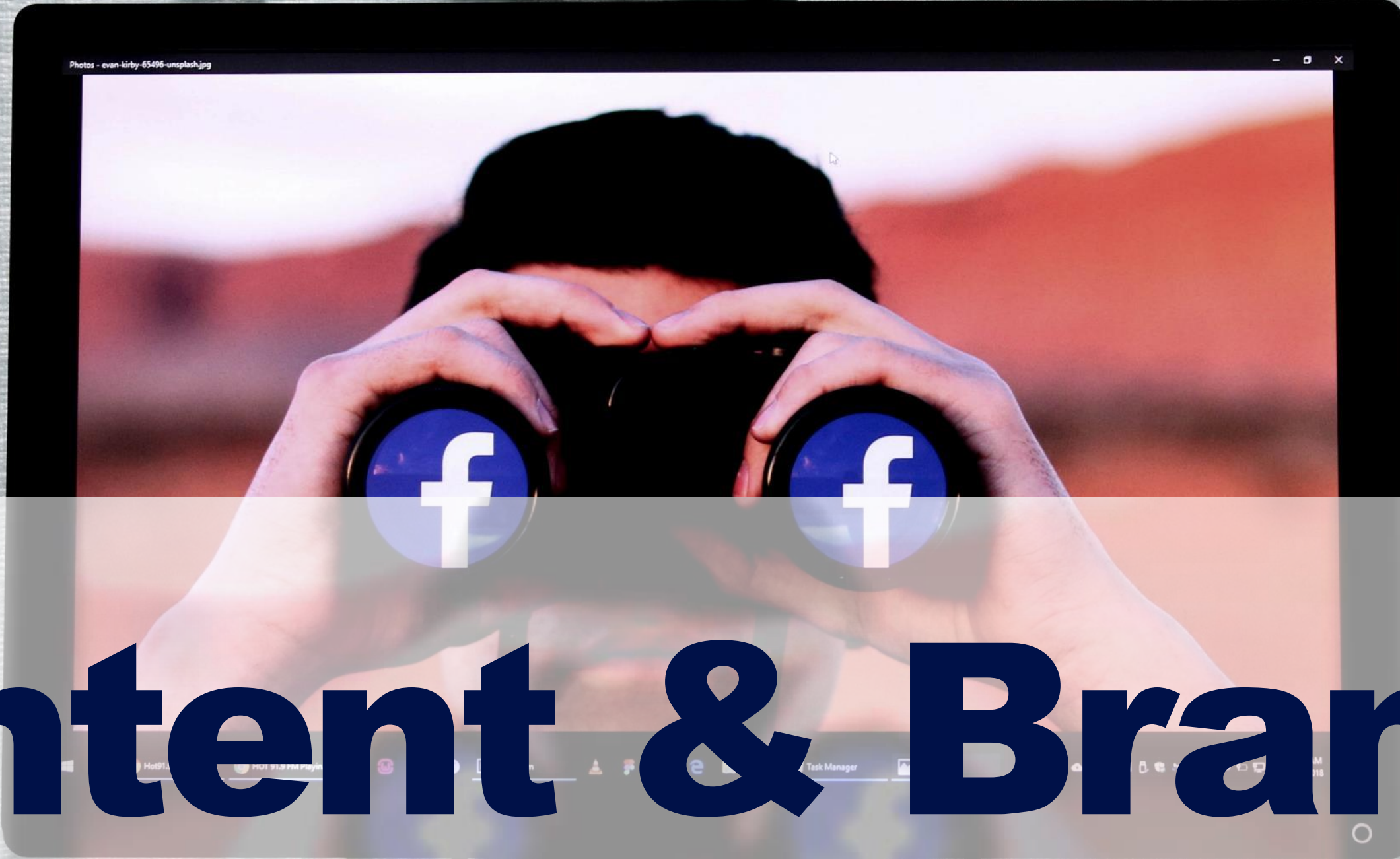




Most Of Those Who Play Games On Their Phone Do So Everyday

Frequency Of Usage





Content & Brand Expectations

In Ramadan, People Are Drawn To Various Types Of Content, Especially Holy Content And Any Ramadan Related Content From Décor To Fashion And Festivities

Sought Out Content During Ramadan



80%

Ramadan Related Holy Content



73%

Ramadan Home Décor Ideas



73%

Ramadan Fashion Tips & Ideas



72%

Ramadan Festivities Related Content



72%

Product Reviews / Unboxing Videos



70%

Deals & Offers



70%

Entertaining Videos



68%

Ramadan Recipes



68%

Content Related To Specific TV Channels

While The Older Generation Are More Likely To Follow Various Types Of Content, The Youth And Affluent People Are Highly Drawn To Fashion-related Content

Sought Out Content During Ramadan



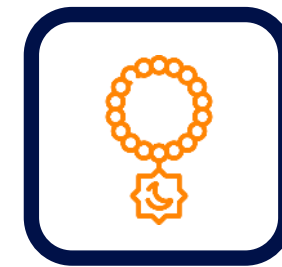
Ramadan Related Holy Content



Ramadan Home Décor Ideas



Ramadan Fashion Tips & Ideas



Ramadan Festivities Related Content



Product Reviews / Unboxing Videos



Deals & Offers



Entertaining Videos



Ramadan Recipes



Content Related To Specific TV Channels

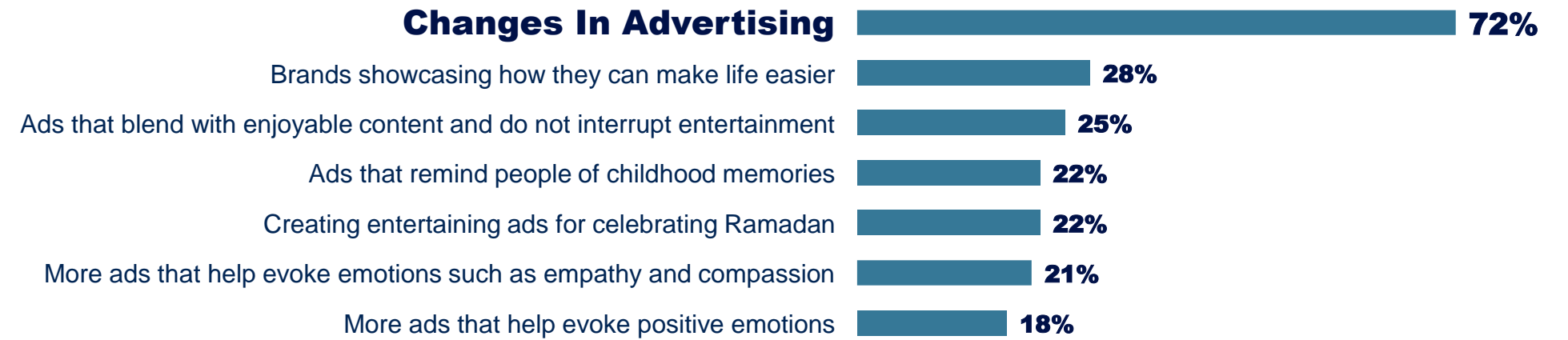
	Ramadan Related Holy Content	Ramadan Home Décor Ideas	Ramadan Fashion Tips & Ideas	Ramadan Festivities Related Content	Product Reviews / Unboxing Videos	Deals & Offers	Entertaining Videos	Ramadan Recipes	Content Related To Specific TV Channels
Total	80%	73%	73%	72%	72%	70%	70%	68%	68%
Male	76%	68%	70%	70%	67%	68%	69%	62%	68%
Female	84%	77%	75%	74%	75%	72%	71%	72%	68%
Generation Z	76%	63%	80%	72%	71%	65%	70%	64%	71%
Millennials	80%	75%	70%	73%	71%	70%	71%	68%	66%
Generation X	87%	79%	77%	71%	77%	78%	71%	74%	74%
Upper Income	81%	77%	80%	76%	73%	72%	74%	70%	76%
Middle Income	81%	72%	70%	70%	74%	71%	68%	66%	65%
Lower Income	74%	63%	54%	65%	59%	60%	63%	63%	50%

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

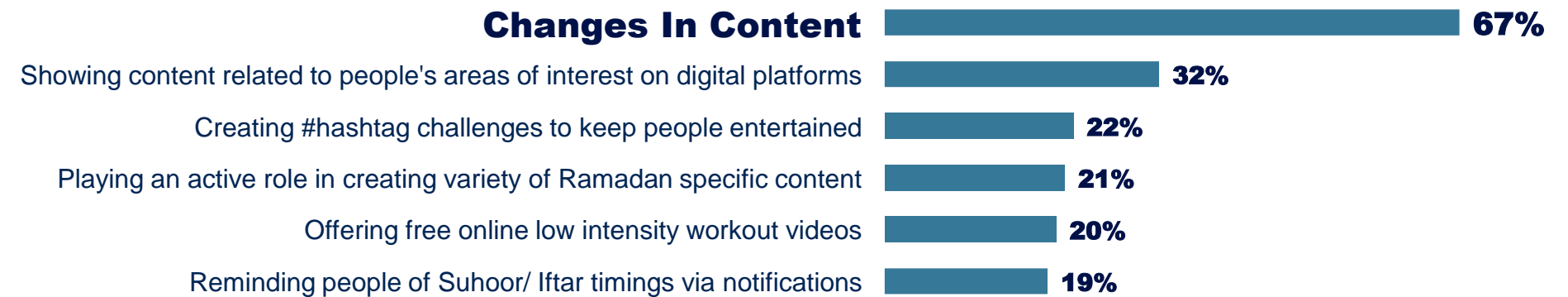


People's Expectations Of Brands During Ramadan

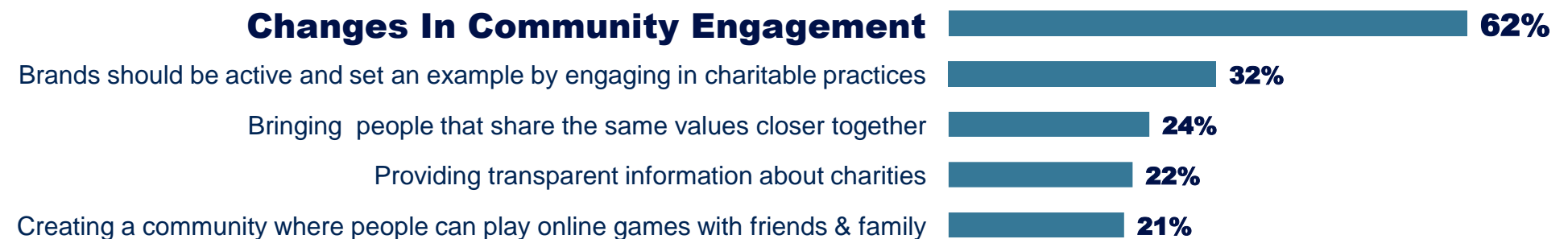
Changes In Advertising



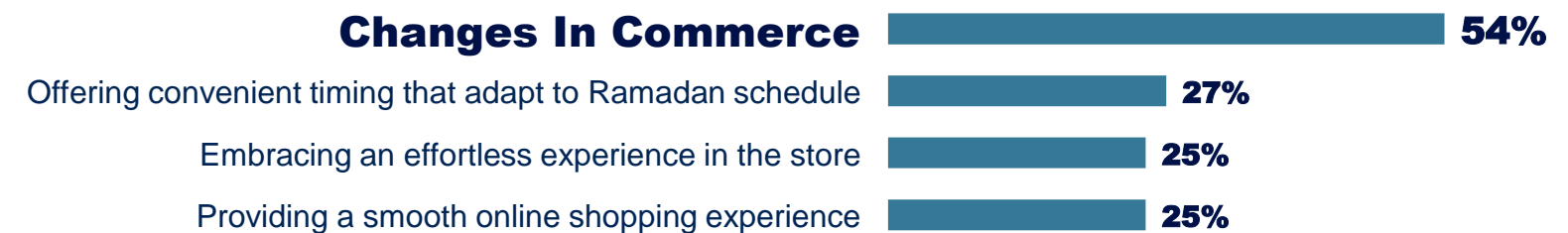
Changes In Content




Changes In Community Engagement




Changes In Commerce



The Older Generation Is More Likely To Expect Brands To Make Changes On All Aspects While Gen Z Highly Want Changes In Content

 **72%**
Changes In Advertising

 **67%**
Changes In Content

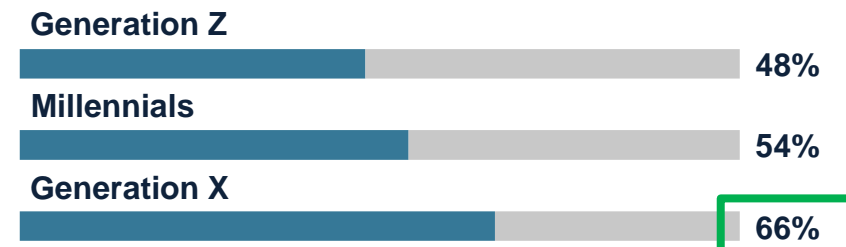
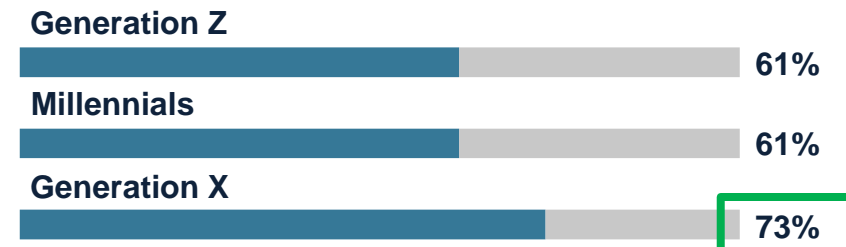
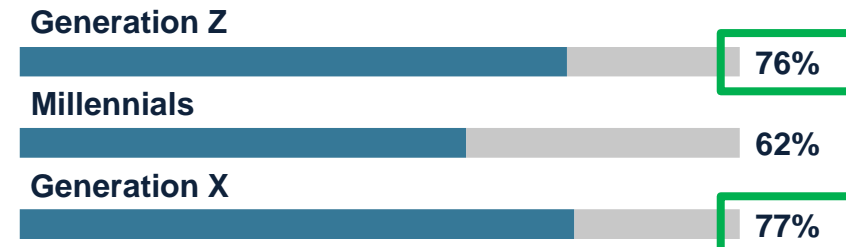
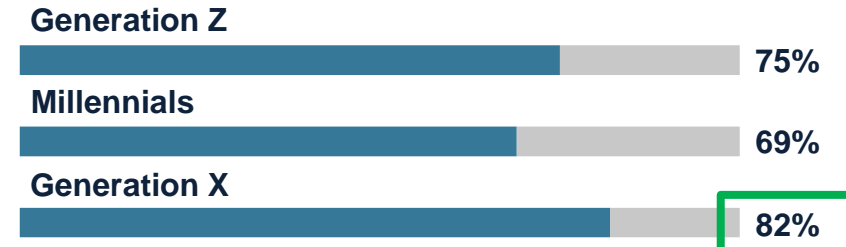
 **62%**
Changes In Engagement

 **54%**
Changes In Commerce

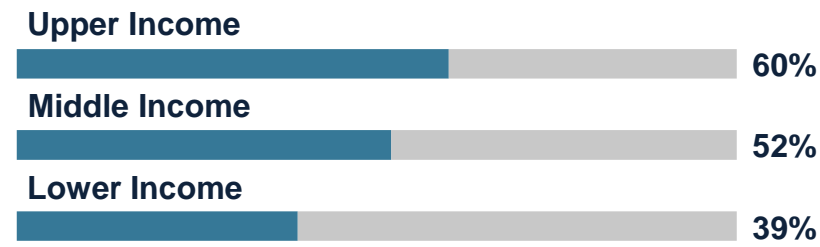
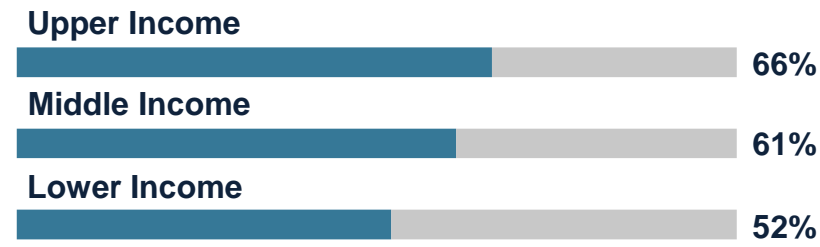
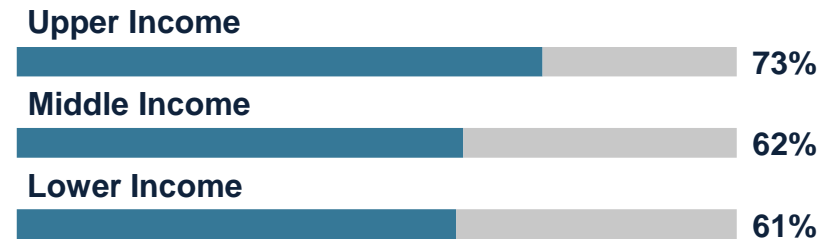
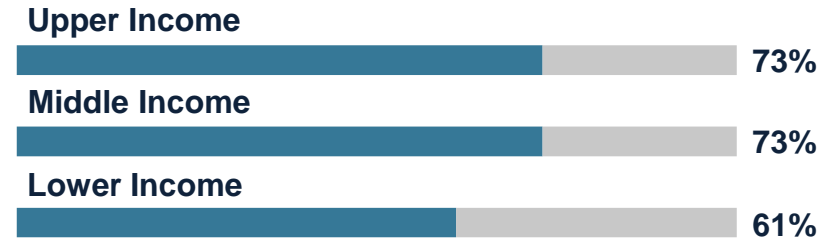
By Gender



By Generation



By Income Level



Thank You

For more information please contact:

Saad Masri
Research Director - Ipsos in UAE
saad.masri@ipsos.com

GAME CHANGERS

