

toluna* METRIXLAB

2024 Ramadan & Eid al-Fitr Insights



UAE



KSA





RESEARCH OBJECTIVES

- ✓ To understand the shopping plans, potential consumption behaviour, and media habits during the upcoming 2024 Ramadan & Eid al-Fitr in UAE & KSA.
- ✓ To chalk out the impact of Ramadan moving into the winter months on consumer consumption & preferences.
- ✓ Additionally, to examine the potential alterations in brand purchases arising from the current geo-political circumstances.

TARGET AUDIENCE

- Males & females
- 18 to 55 years old
- All nationalities
- Average monthly household income:

| | 2023 | 2024 |
|-------------------------------------------------------------------------------------|------------|------------|
|  | AED 21,633 | AED 21,472 |
|  | SAR 17,196 | SAR 17,963 |



METHODOLOGY

Online quantitative surveys based on a structured questionnaire.

Fieldwork Dates

Benchmark wave: 2023

15th – 23rd February 2023

Current wave: 2024

19th – 24th January 2024



SAMPLE SIZE

| | 2023 | 2024 |
|---------------------------------------------------------------------------------------|----------------|----------------|
|  | 499 Interviews | 518 Interviews |
|  | 505 Interviews | 518 Interviews |

Flow of the Report



| Pg. | TOPIC |
|-----|-------------------------------------------------------------------------------|
| 4 | General behaviour & perception around Ramadan & Eid |
| 9 | Shopping & activities planning around 2024 Ramadan & Eid |
| 20 | Impact of winter Ramadan on spending behaviour in 2024 |
| 26 | Consumer expectations from brands & banks during 2024 Ramadan & Eid |
| 31 | Expected online vs. offline shopping behaviour during 2024 Ramadan |
| 36 | Likely gifting behaviour during 2024 Eid Al-Fitr |
| 45 | Expected media behaviour & communication preferences during 2024 Ramadan |
| 52 | Spending plans for global vs. local brands due to recent geo-political events |
| 55 | Key Takeaways |



GENERAL BEHAVIOUR AND PERCEPTIONS AROUND RAMADAN & EID

In 2024, greater proportion of UAE residents expressed their excitement about ‘special Ramadan editions by brands’ and ‘Ramadan being auspicious for new purchases’.



Top 2 Box Scores
(Strongly + Somewhat agree)

| 2023 | 2024 | |
|------|------|--------------------------------------------------------------------------|
| 80% | 83% | I am looking forward to special Ramadan events in stores |
| 79% | 83% | I like to treat my family / myself with special gifts during this period |
| 76% | 81% | I am excited about the brands' special Ramadan editions |
| 76% | 79% | Shopping is an important part of this festive period |
| 74% | 73% | I postpone some purchases to take advantage of special offers/promotions |
| 64% | 69% | I feel Ramadan is an auspicious month for 'new purchases' |






Whereas, a significantly higher segment of KSA residents are acknowledging Ramadan as a fortunate month for new purchases – indicating greater spending sentiment in 2024.



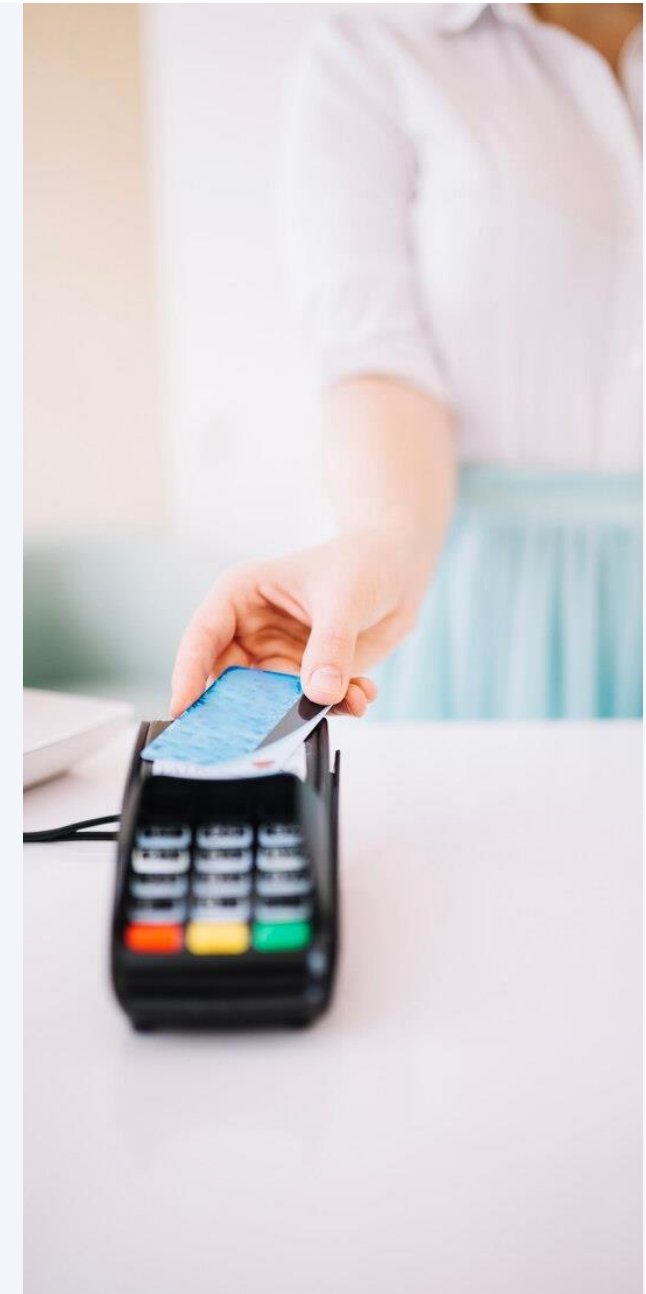
Top 2 Box Scores
(Strongly + Somewhat agree)

| | 2023 | 2024 |
|--------------------------------------------------------------------------|------|-----------------------------------------------------------------------------------------|
| Shopping is an important part of this festive period | 77% | 80% |
| I like to treat my family / myself with special gifts during this period | 81% | 86% |
| I feel Ramadan is an auspicious month for 'new purchases' | 55% | 64%  |
| I postpone some purchases to take advantage of special offers | 73% | 74% |
| I am excited about the brands' special Ramadan editions | 76% | 80% |
| I am looking forward to special Ramadan events in stores | 77% | 81% |



Although offers & promotions and product prices remain the top two determinants while selecting the shopping destination during Ramadan in UAE, a significantly greater segment of residents are going to attach importance to 'hassle free returns' & 'having multiple counters for faster payments' in 2024.


| | 2023 | 2024 | |
|------------------------------------------------|------|------|---|
| ● Offers and promotions | 53% | 48% | |
| ● Price of products | 56% | 45% | ▼ |
| ● Range of products offered | 25% | 27% | |
| ● Free delivery to home | 21% | 25% | |
| ● Range of brands offered | 23% | 24% | |
| ● Convenient location | 24% | 24% | |
| ● Stays open until late (after midnight) | 24% | 20% | |
| ● Ability to return products easily | 13% | 18% | ▲ |
| ● Recommendations from friends/family | 17% | 17% | |
| ● Multiple billing counters for quick payments | 10% | 14% | ▲ |
| ● Helpful staff for assistance | 14% | 14% | |
| ● Doesn't get very crowded | 10% | 13% | |
| ● Ample parking space | 8% | 11% | |





Similarly in KSA, offers & promotions and product prices remain the key drivers of choosing the shopping destination. However, a significantly higher proportion of residents are inclined towards visiting those outlets which are ‘conveniently located’.



| | 2023 | 2024 |
|------------------------------------------------|------|-----------------------------------------------------------------------------------------|
| ● Price of products | 49% | 48% |
| ● Offers and promotions | 50% | 45% |
| ● Range of products offered | 22% | 25% |
| ● Convenient location | 18% | 24%  |
| ● Recommendations from friends/family | 19% | 23% |
| ● Stays open until late (after midnight) | 21% | 21% |
| ● Free delivery to home | 22% | 21% |
| ● Range of brands offered | 21% | 20% |
| ● Ability to return products easily | 20% | 19% |
| ● Doesn't get very crowded | 21% | 18% |
| ● Ample parking space | 13% | 17% |
| ● Helpful staff for assistance | 12% | 12% |
| ● Multiple billing counters for quick payments | 12% | 8% |



SHOPPING & ACTIVITIES PLANNING AROUND 2024 RAMADAN & EID



UAE residents plan to buy groceries, household cleaning & home décor items, and book international trips mostly 'before Ramadan begins'. Further, Eid gifts shopping is expected to happen throughout the holy month.

Maximum likelihood of an activity

2024 RAMADAN





However, KSA residents also plan 'shop new outfits for Iftars/Eid' largely before Ramadan begins, along with buying groceries, household cleaning items, home décor, and reserving international trips.

2024 RAMADAN

Maximum likelihood of an activity

| | Before | In the beginning | Throughout | Last 10 days | Last 3 days | During Eid |
|-----------------------------------------------|--------|------------------|------------|--------------|-------------|------------|
| figures in % | | | | | | |
| Bulk buying groceries | 66 | 13 | 9 | 5 | 3 | 2 |
| Bulk buying household cleaning items | 64 | 11 | 11 | 5 | 4 | 2 |
| Shopping for new outfits for Iftars/Eid | 31 | 14 | 28 | 17 | 6 | 3 |
| Start inviting friends & relatives | 13 | 26 | 32 | 8 | 8 | 8 |
| Buying new home decors for Ramadan / Eid | 55 | 11 | 11 | 7 | 4 | 2 |
| Book a trip within the country during Eid | 16 | 10 | 22 | 17 | 10 | 12 |
| Book a trip outside of the country during Eid | 21 | 9 | 13 | 12 | 9 | 11 |
| Book a Staycation during Eid | 15 | 14 | 22 | 16 | 10 | 10 |
| Start buying Eid gifts | 14 | 11 | 34 | 25 | 11 | 3 |
| Buy most of the Eid gifts | 17 | 13 | 30 | 22 | 12 | 3 |



During 2024 Eid, a significantly greater segment of UAE residents are keen on participating in cultural activities; visiting theme parks; attending concerts, live shows, etc.; and traveling abroad.



Top 2 Box Scores
(Extremely + Somewhat likely)

| | 2023 | 2024 | |
|-----------------------------------------------|------|------|---|
| ● Visiting relatives & friends | 80% | 84% | |
| ● Visiting shopping malls for 'shopping' | 79% | 81% | |
| ● Going to restaurants/fine dining | 73% | 76% | |
| ● Visiting shopping malls for 'entertainment' | 70% | 71% | |
| ● Taking a staycation in the same city | 62% | 65% | |
| ● Participating in cultural activities | 53% | 64% | ▲ |
| ● Visiting theme parks | 56% | 63% | ▲ |
| ● Traveling abroad | 47% | 57% | ▲ |
| ● Visiting cinema | 44% | 48% | |
| ● Visiting concert/live show/events, etc. | 37% | 47% | ▲ |

However in Saudi, more residents are likely to shop at malls, eat at restaurants, participate in cultural activities and travel outside of the country during 2024 Eid vs. 2023.



Top 2 Box Scores
(Extremely + Somewhat likely)

| | 2023 | 2024 |
|-----------------------------------------------|------|------|
| ● Visiting relatives & friends | 82% | 84% |
| ● Visiting shopping malls for 'shopping' | 71% | 76% |
| ● Going to restaurants/fine dining | 70% | 75% |
| ● Visiting shopping malls for 'entertainment' | 72% | 74% |
| ● Taking a staycation in the same city | 69% | 69% |
| ● Traveling within the country | 65% | 68% |
| ● Visiting theme parks | 63% | 65% |
| ● Participating in cultural activities | 50% | 56% |
| ● Visiting cinema | 50% | 52% |
| ● Traveling abroad | 44% | 49% |
| ● Visiting concert/live show/events, etc. | 42% | 43% |





In 2024, UAE residents expect to spend...



More than 2023

46%



Same as 2023

29%

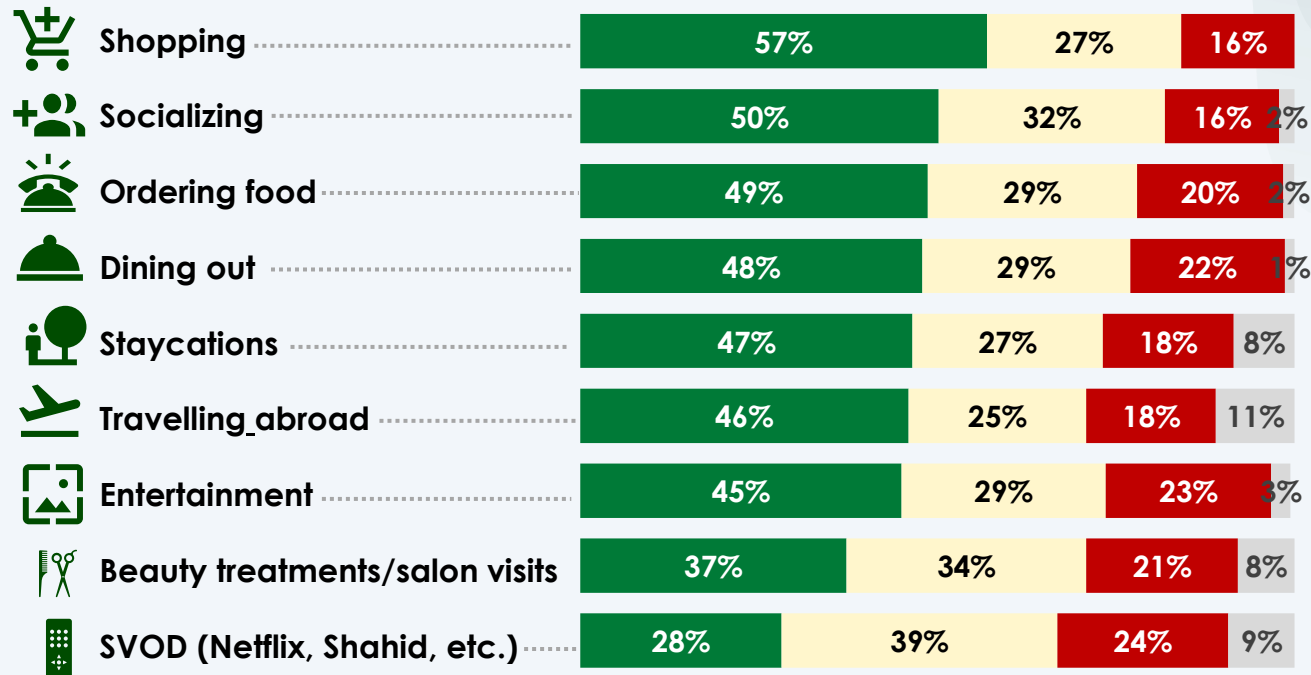


Less than 2023

25%

Shopping, socializing, ordering food and eating out emerged as the leading categories on which UAE residents are planning to spend more during Ramadan & Eid this year, compared to 2023.

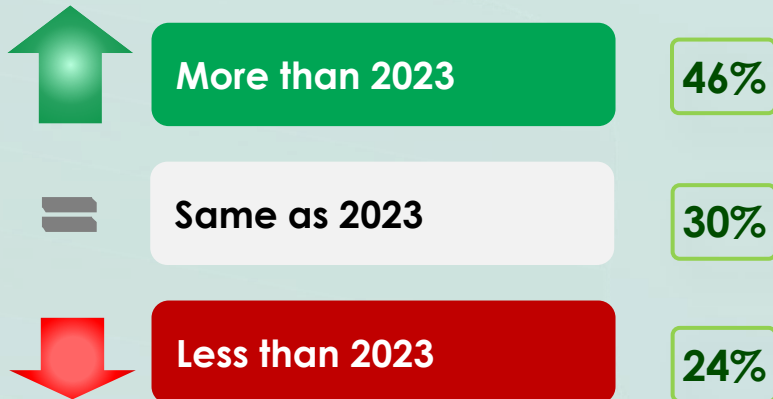
In 2024, UAE residents expect to spend during Ramadan & Eid on...



More than 2023 Same as 2023 Less than 2023 I don't spend

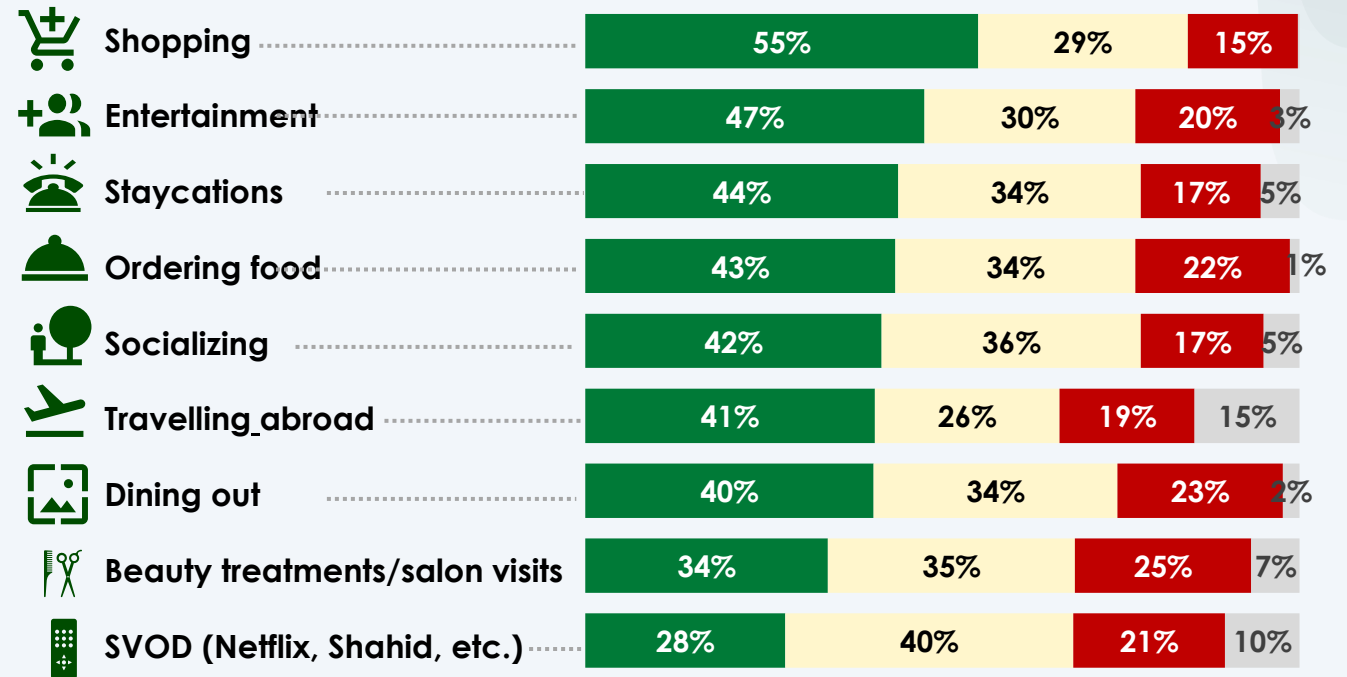


In 2024, KSA residents expect to spend...



However, KSA residents are inclined to spend more on shopping, entertainment and staycations during Ramadan & Eid this year, vs. 2023.

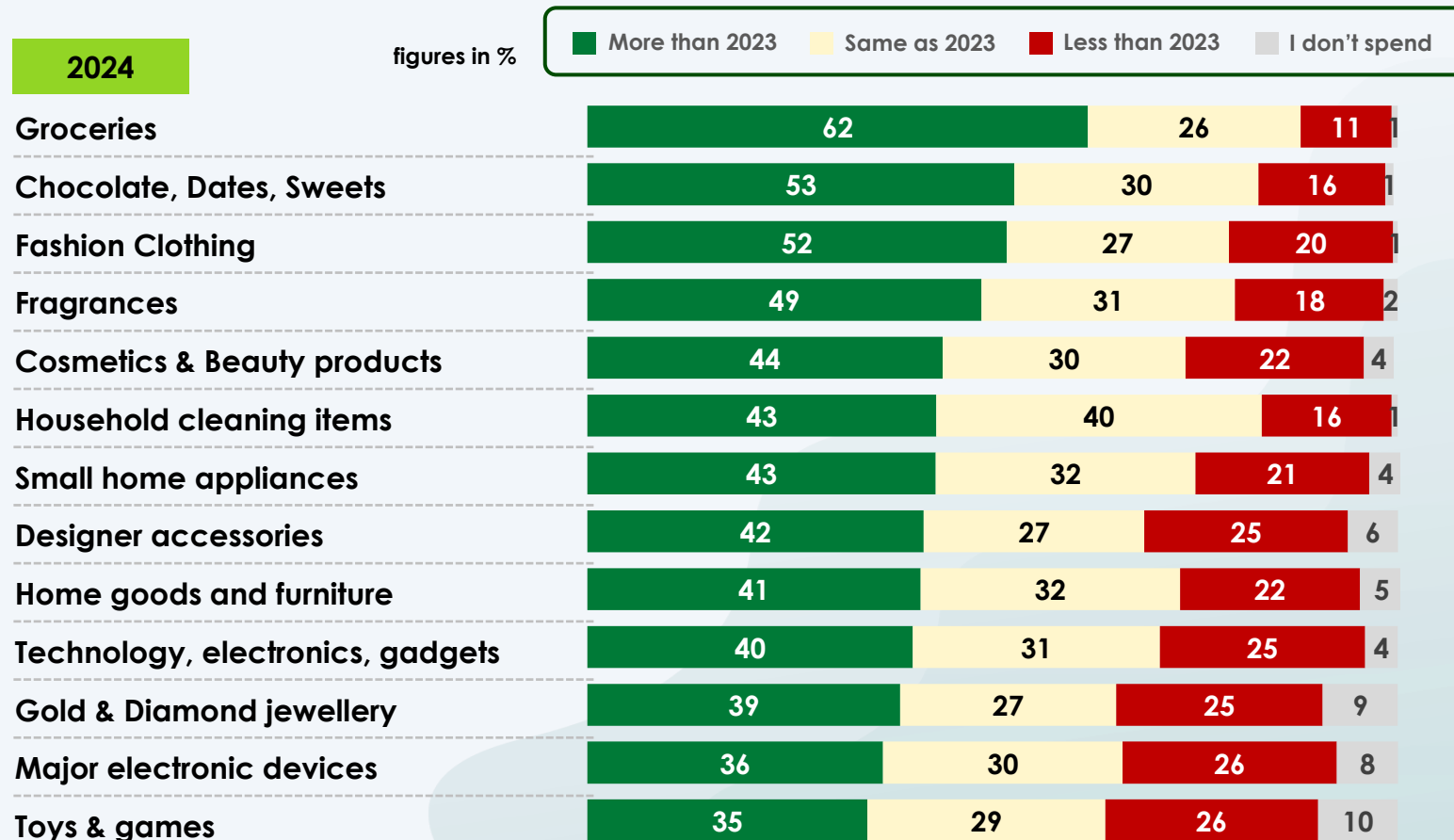
In 2024, KSA residents expect to spend during Ramadan & Eid on...



More than 2023 Same as 2023 Less than 2023 I don't spend



Shopping categories that can see maximum uplift in 2024 vs. 2023 include groceries; chocolate, dates & sweets; fashion clothing; fragrances; and cosmetics & beauty products.

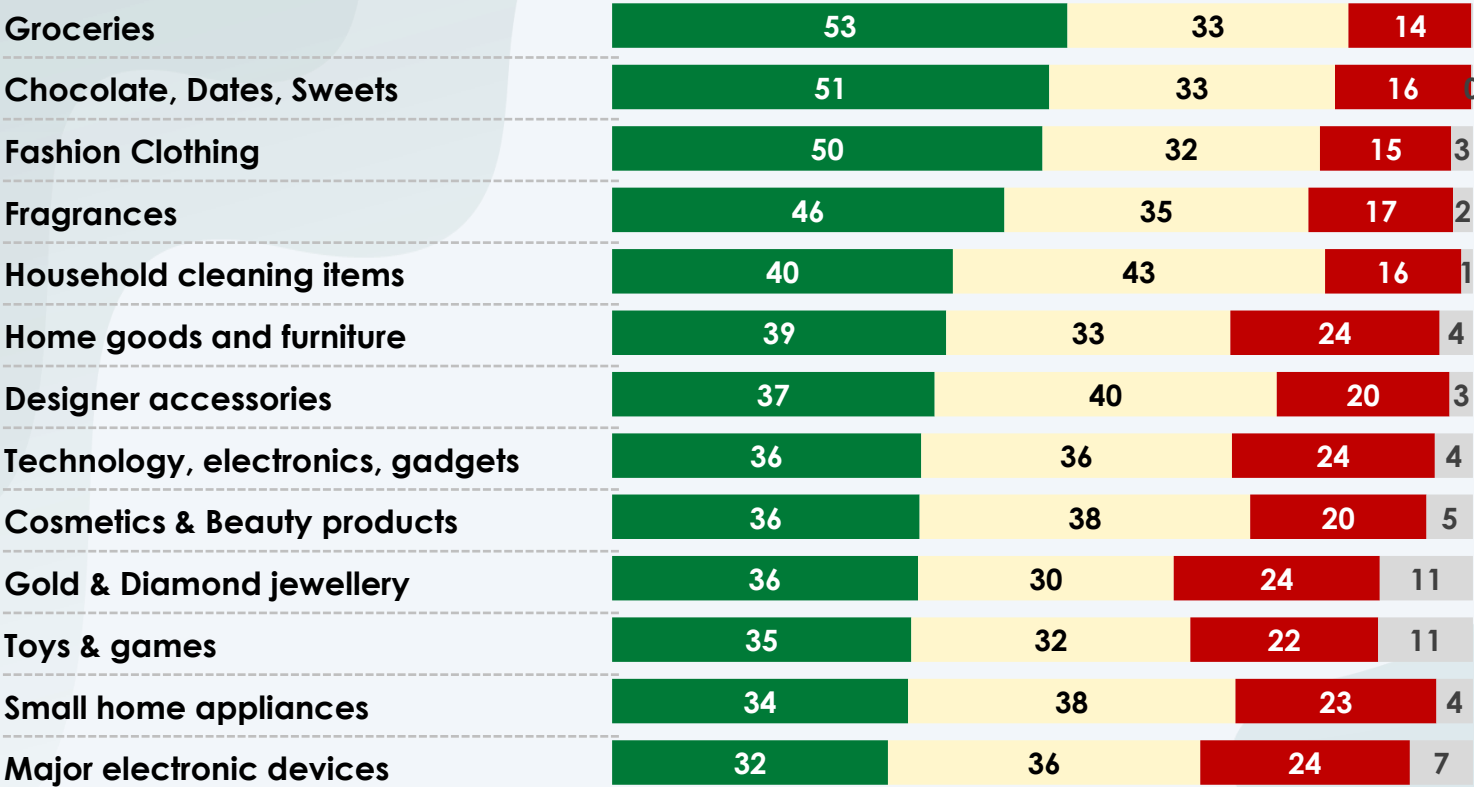




Whereas in KSA, the top five growth categories for shopping also include household cleaning items along with groceries; chocolate, dates & sweets; fashion clothing; and fragrances.

2024

figures in %





2024

23%

WILL
BUY...

38%

CONSIDER
BUYING...

...a brand-new car
during upcoming
Ramadan in UAE



Ramadan promotions UAE residents are interested in...

Price Discounts (% off)

26%

0% finance charges on car loan

17%

Extended warranty

16%

Low interest rates on car loans

13%

0% Downpayment

10%

Extended Insurance

9%

Extended service

9%

Base: Those who will or consider to buy a brand new car
(UAE: 316)



2024

22%

WILL
BUY...

43%

CONSIDER
BUYING...

...a brand-new car
during upcoming
Ramadan in KSA



Ramadan promotions KSA residents are interested in...

| | |
|---------------------------------|-----|
| Price Discounts (% off) | 28% |
| 0% finance charges on car loan | 16% |
| Low interest rates on car loans | 16% |
| Extended Insurance | 11% |
| Extended service | 11% |
| 0% downpayment | 10% |
| Extended warranty | 7% |

Base: Those who will or consider to buy a brand new car
(KSA: 338)



IMPACT OF WINTER RAMADAN ON SPENDING BEHAVIOUR IN 2024

The
prominent
emotions
expressed
are...

2024



52%



53%

...**EXCITEMENT** due to
multiple outdoor
options available in
winter during
Ramadan

2024



33%



34%

...**COMFORT** due to
reduced fasting hours
because of shorter days
during winter

Owing to winter Ramadan, UAE consumers expect to consume more of dates, hot beverages and chocolates & sweets.

Impact on category purchases due to winter Ramadan



2024

MORE

SAME

LESS

| | | | |
|------------------------------------------------------------------|----|----|----|
| Dates | 51 | 43 | 6 |
| Hot beverages (coffee, tea, etc.) | 47 | 43 | 10 |
| Chocolates and sweets | 46 | 45 | 9 |
| Traditional Ramadan sweets (Katayef, Luqaimat, Basboosa, etc.) | 43 | 48 | 9 |
| Dairy products | 42 | 50 | 7 |
| Special Ramadan beverages (Vimto, Sobia, Qamar al-Din, etc.) | 41 | 50 | 9 |
| Fragrances | 37 | 52 | 11 |
| Condiments (Hot sauce, Ketchup, yellow mustard, etc.) and spices | 32 | 58 | 10 |
| Cold packed beverages (soft drinks, juices, etc.) | 32 | 47 | 21 |
| Beauty and Personal care products | 31 | 55 | 14 |
| Baby care products (diapers, moisturizers, etc.) | 23 | 51 | 25 |



On the other hand, majority of KSA residents expect to consume all of the below categories in similar quantity as previous summer Ramadans.

Impact on category purchases due to winter Ramadan



2024

MORE

SAME

LESS

Dates

43

51

6

Hot beverages (coffee, tea, etc.)

41

51

8

Chocolates and sweets

41

50

9

Traditional Ramadan sweets (Katayef, Luqaimat, Basboosa, etc.)

39

53

8

Dairy products

37

56

7

Condiments (Hot sauce, Ketchup, yellow mustard, etc.) and spices

35

56

9

Special Ramadan beverages (Vimto, Sobia, Qamar al-Din, etc.)

34

55

11

Fragrances

32

58

10

Beauty and Personal care products

27

59

14

Cold packed beverages (soft drinks, juices, etc.)

24

52

24

Baby care products (diapers, moisturizers, etc.)

22

55

23

When it comes to beauty & personal care products, about one-third of UAE residents plan to use more of moisturizers and oral care products.



Impact on 'beauty & personal care products' shopping due to winter Ramadan

| | 2024 | | |
|-----------------------------------------------------|------|------|------|
| | MORE | SAME | LESS |
| Moisturizers | 35 | 53 | 12 |
| Oral Care products (toothpaste, mouthwash, etc.) | 31 | 61 | 8 |
| Cleansers | 30 | 57 | 13 |
| Hair Care products (shampoo, conditioner, etc.) | 29 | 61 | 10 |
| Make-up/cosmetics | 25 | 52 | 23 |
| Sunscreen | 25 | 51 | 24 |
| Nail Care products | 22 | 57 | 21 |





Whereas, hair care products & moisturizers came up as the primary categories that KSA residents expect to buy more of, due to winter Ramadan.



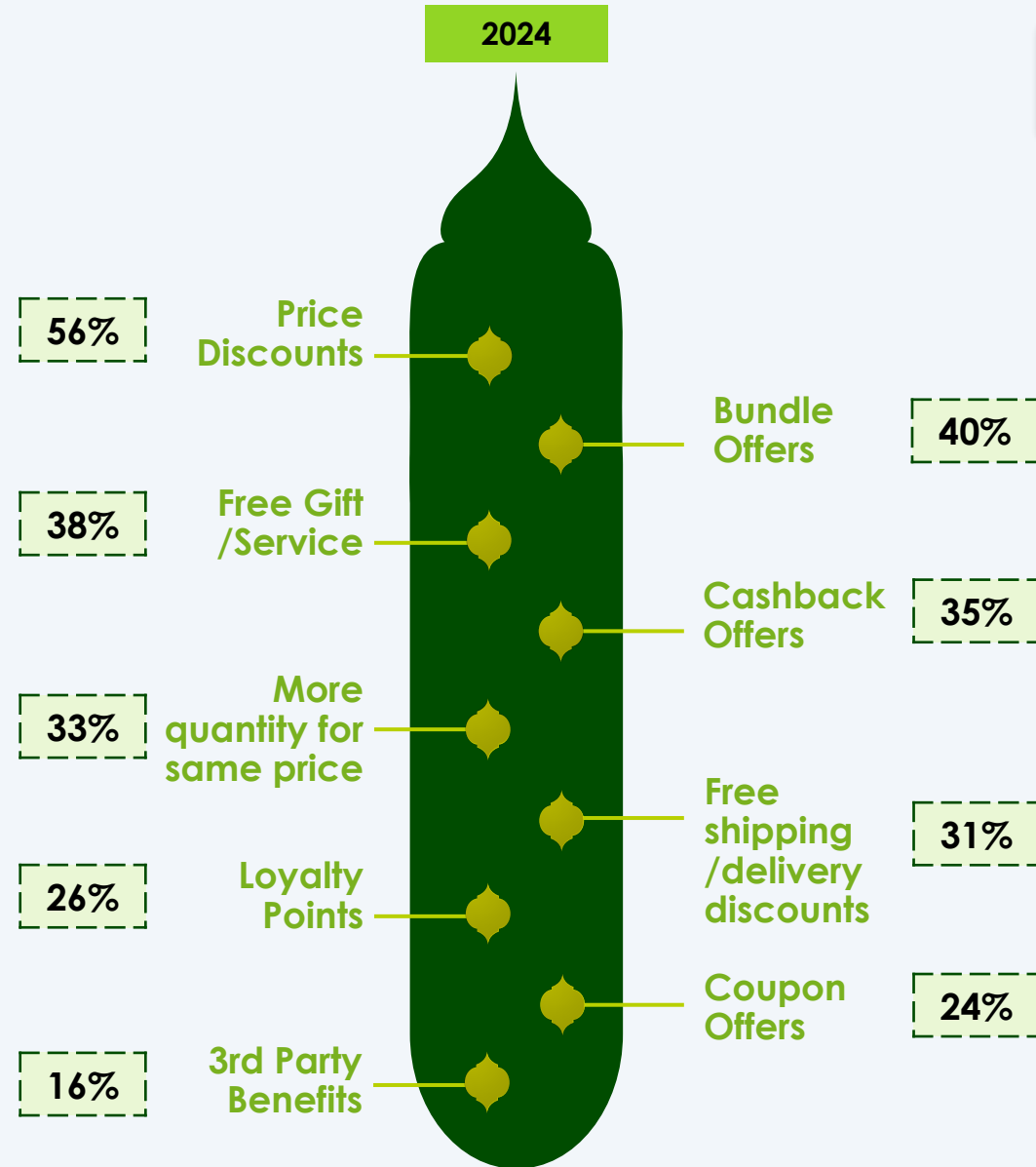
Impact on
'beauty &
personal care
products'
shopping due
to winter
Ramadan

| | 2024 | | |
|-----------------------------------------------------------|------|------|------|
| | MORE | SAME | LESS |
| Hair Care products (shampoo, conditioner, masks, etc.) | 29 | 63 | 8 |
| Moisturizers | 29 | 60 | 11 |
| Oral Care products (toothpaste, mouthwash, etc.) | 26 | 67 | 6 |
| Cleansers | 26 | 63 | 11 |
| Make-up/cosmetics | 24 | 53 | 23 |
| Nail Care products | 22 | 56 | 22 |
| Sunscreen | 19 | 53 | 28 |



CONSUMER EXPECTATIONS FROM BRANDS & BANKS DURING 2024 RAMADAN & EID

For shopping during 2024 Ramadan & Eid, UAE residents can be tempted by brands who offer price discounts, bundle offers and free gifts/services.

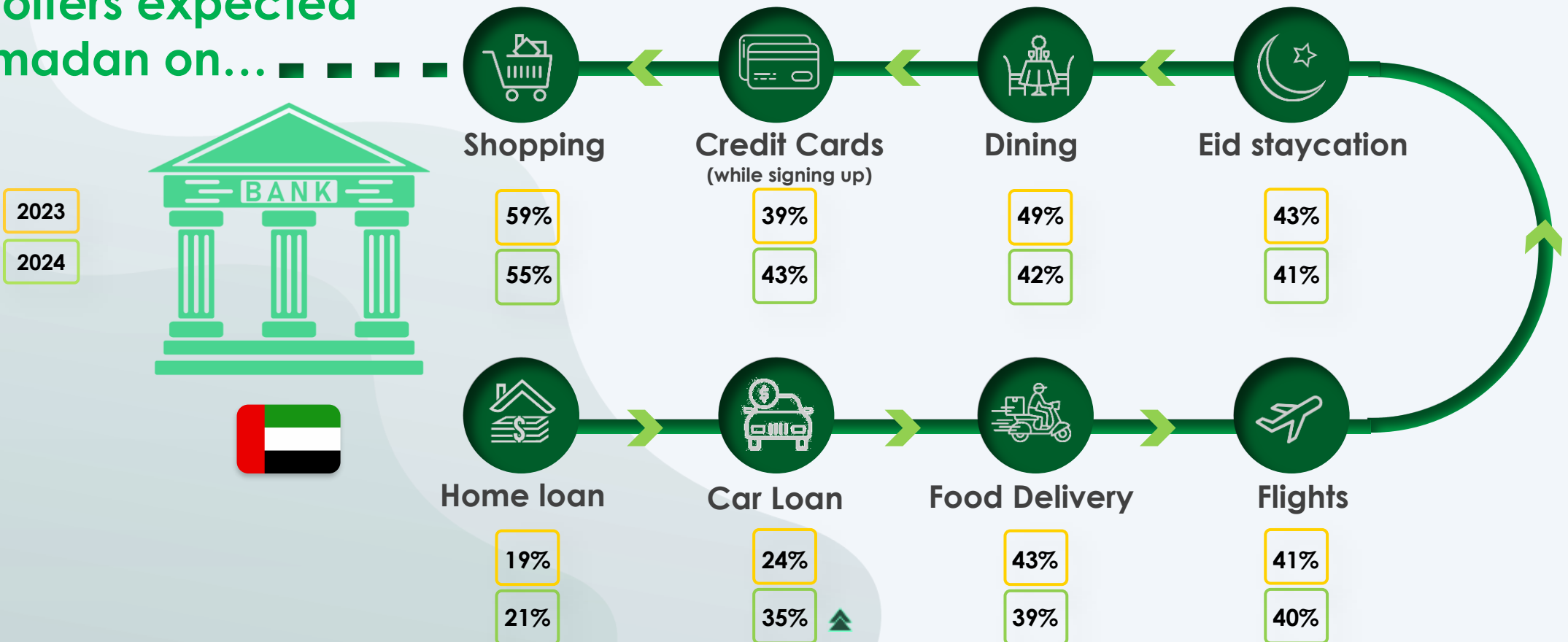


While in KSA, residents find price discounts, more quantity for the same price deals and bundle offers relatively more attractive for shopping.



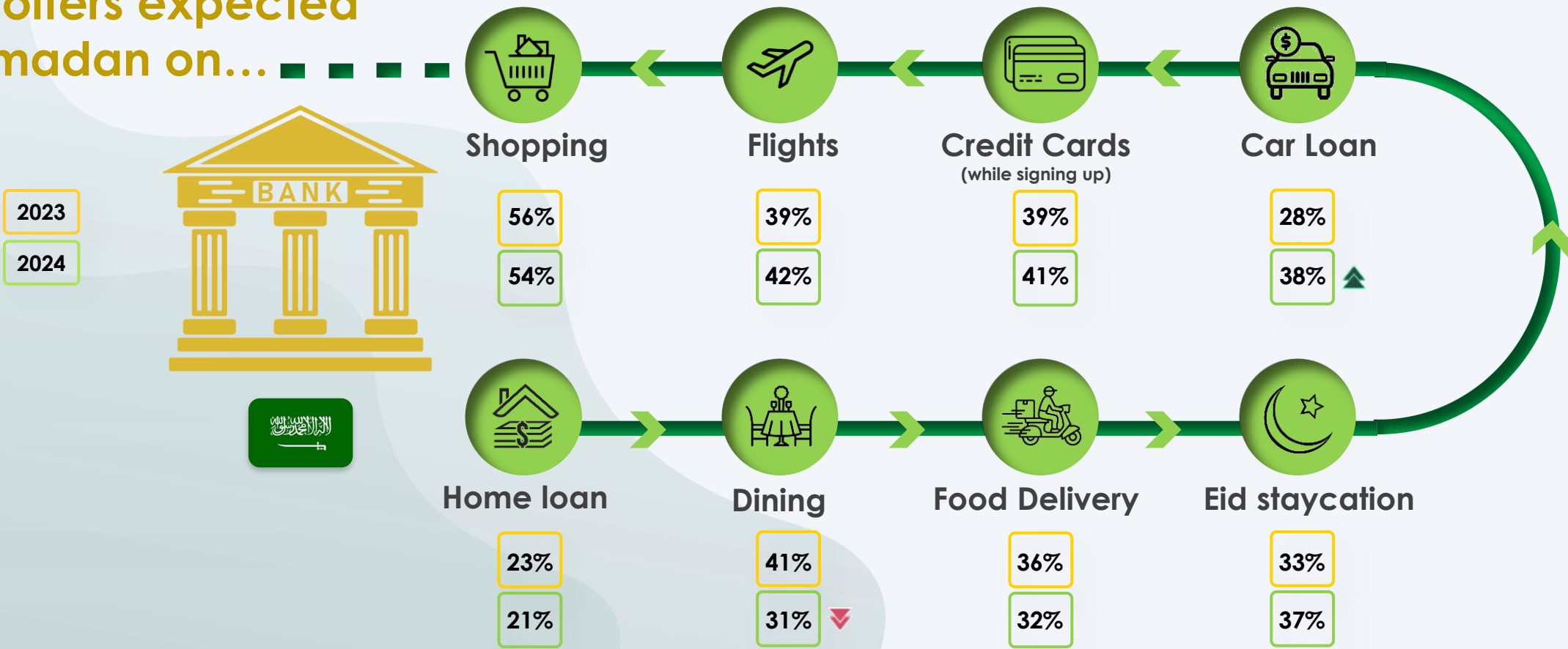
The top 3 expectations that UAE residents have from banks during 2024 Ramadan are offers pertaining to shopping, signing up for new credit cards, and dining. Further, a significant hike is noted for those looking for lucrative offers on car loan.

Bank offers expected in Ramadan on...



The primary expectations in Saudi from banks include offers on shopping, air travel and signing up for new credit cards. Similar to UAE, a significantly higher segment of KSA residents are interested in car loan offers.

Bank offers expected in Ramadan on...





EXPECTED ONLINE VS. OFFLINE SHOPPING BEHAVIOUR DURING 2024 RAMADAN



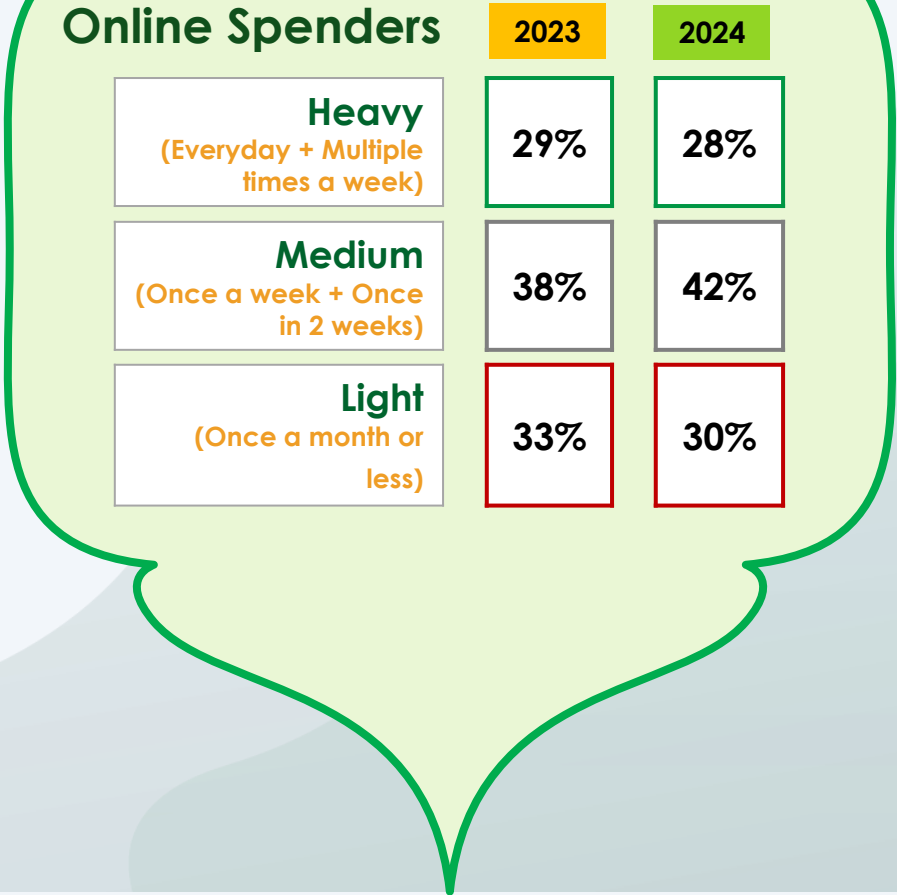
In terms of general spending habits, an 'upward trend' has been registered of those who shop medium to heavy online in UAE.

Online Spenders

| | 2023 | 2024 |
|----------------------------------------------------|------|------|
| Heavy (Everyday + Multiple times a week) | 34% | 37% |
| Medium (Once a week + Once in 2 weeks) | 38% | 40% |
| Light (Once a month or less) | 28% | 23% |



In KSA, there seems to be a shift taking place from light towards medium intensity online shoppers, while those who shop heavily online are largely the same.



Compared to other times of the year, UAE residents are more inclined towards buying groceries; household cleaning items; chocolate, dates, sweets; fragrances and gold & diamond jewellery in physical stores during Ramadan.




2024

figures in %

 **Online**
(more + somewhat more)

 **Online & Offline**
(Same)

 **Offline**
(more + somewhat more)

Will not shop

| | | | | |
|----------------------------------|----|----|----|----|
| Cosmetics & Beauty products | 32 | 35 | 26 | 7 |
| Fashion Clothing | 32 | 34 | 31 | 3 |
| Small home appliances | 31 | 32 | 26 | 10 |
| Designer accessories | 31 | 30 | 27 | 12 |
| Groceries | 31 | 32 | 36 | 1 |
| Household cleaning items | 31 | 33 | 34 | 2 |
| Chocolate, Dates, Sweets | 31 | 30 | 38 | 2 |
| Technology, electronics, gadgets | 28 | 32 | 29 | 11 |
| Toys & games | 28 | 32 | 23 | 17 |
| Fragrances | 28 | 32 | 33 | 7 |
| Major electronic devices | 26 | 30 | 29 | 15 |
| Home goods and furniture | 24 | 32 | 32 | 12 |
| Gold & Diamond jewellery | 19 | 21 | 43 | 18 |

KSA residents exhibited greater preference of buying groceries and chocolate, dates, sweets physically. And for other categories, majority of them tend to stick to their usual shopping habits.




2024

All figures in %

 **Online**
(more + somewhat more)

 **Online & Offline**
(Same)

 **Offline**
(more + somewhat more)

Will not shop

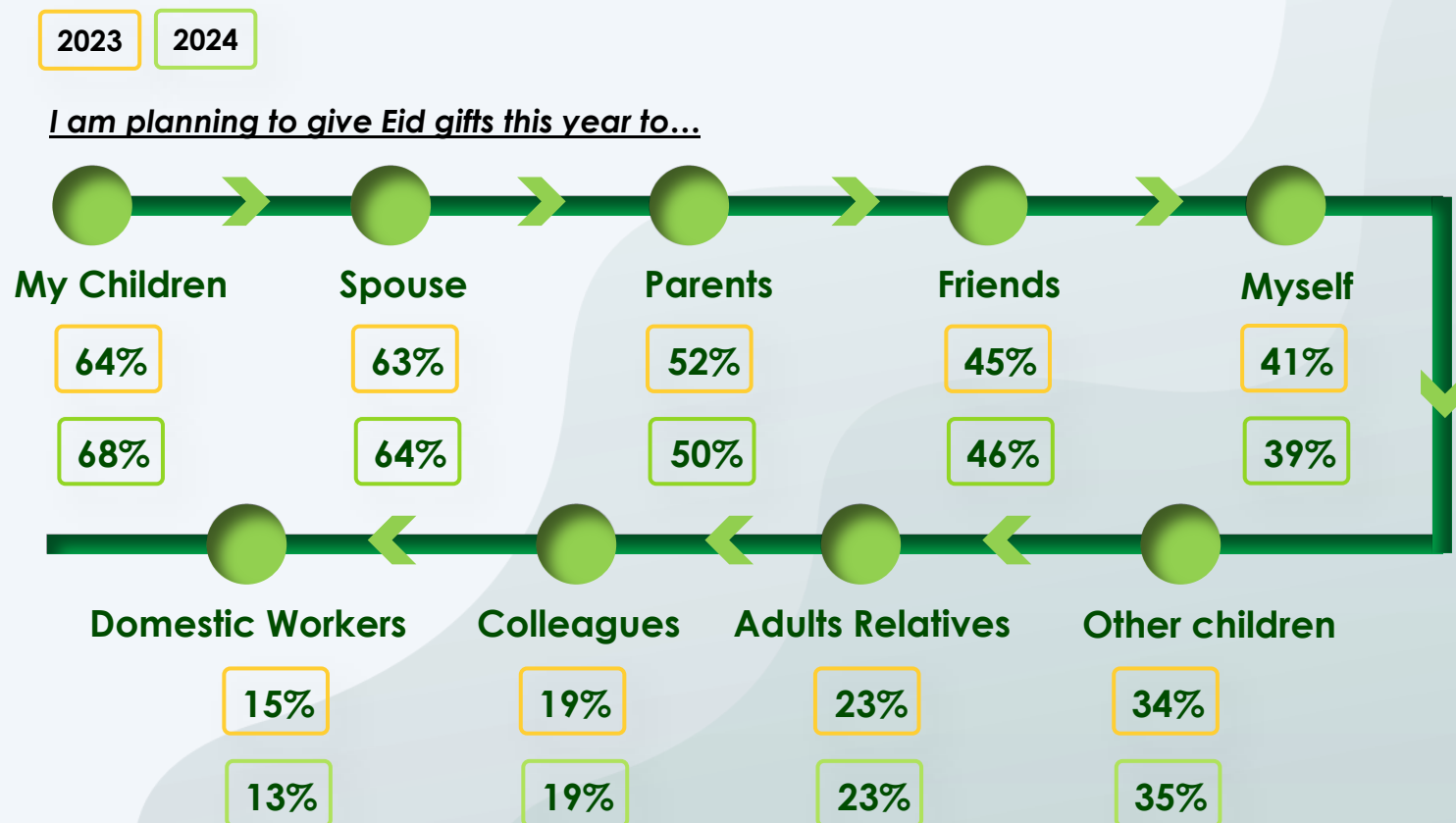
| | | | | |
|----------------------------------------|----|----|----|----|
| Fashion Clothing | 30 | 36 | 30 | 4 |
| Designer accessories | 28 | 41 | 25 | 6 |
| Fragrances | 28 | 37 | 31 | 5 |
| Cosmetics & Beauty products | 27 | 40 | 26 | 7 |
| Technology, electronics, gadgets | 27 | 35 | 27 | 11 |
| Small home appliances | 25 | 40 | 24 | 11 |
| Toys & games | 24 | 36 | 22 | 17 |
| Groceries | 24 | 32 | 43 | 1 |
| Major electronic devices (white goods) | 23 | 36 | 25 | 16 |
| Household cleaning items | 22 | 42 | 33 | 3 |
| Chocolate, Dates, Sweets | 22 | 36 | 41 | 2 |
| Home goods and furniture | 20 | 37 | 32 | 11 |
| Gold & Diamond jewellery | 18 | 31 | 30 | 20 |



LIKELY GIFTING BEHAVIOUR DURING 2024 EID AL-FITR



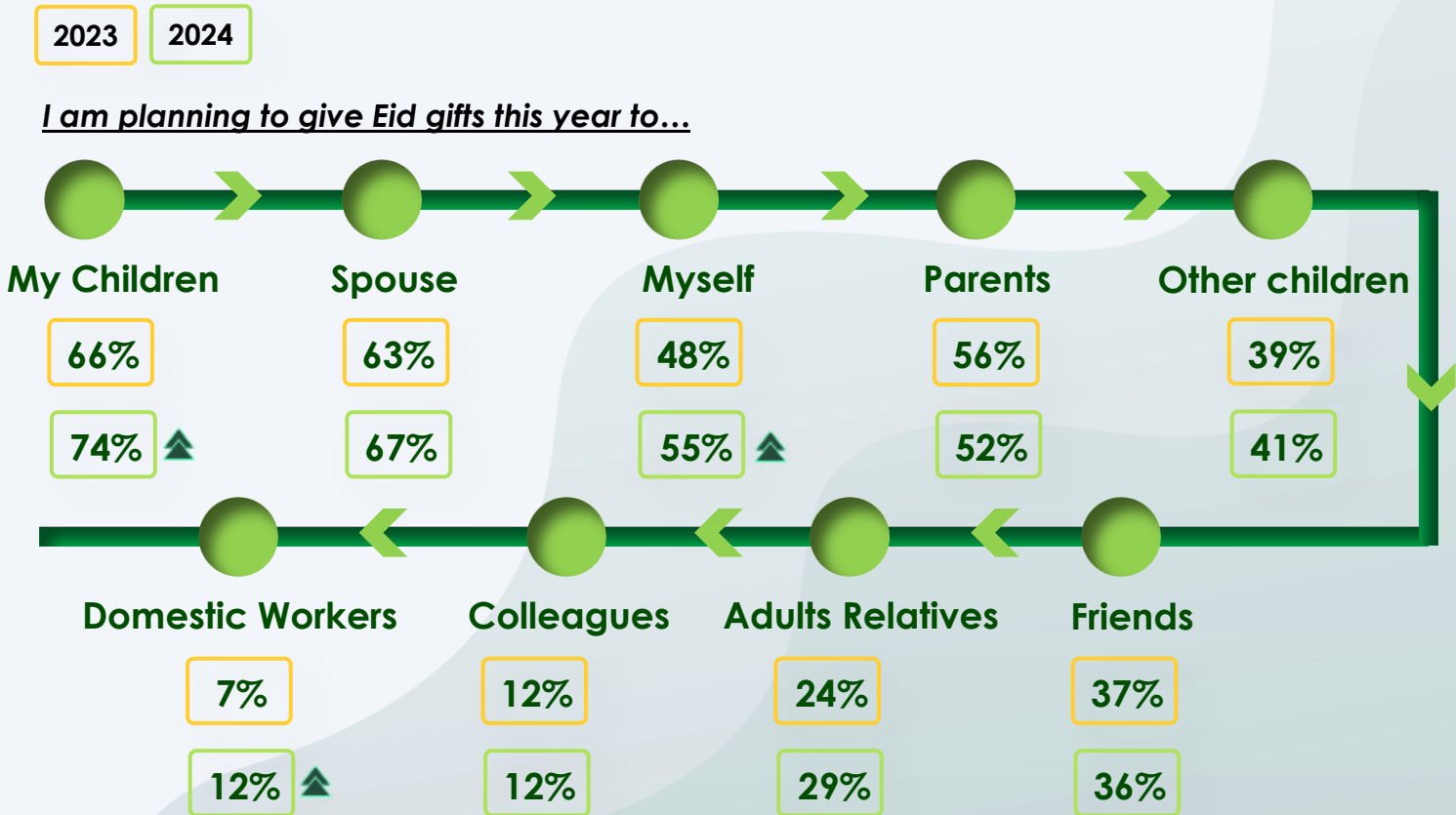
In 2024, UAE residents plan to buy Eid gifts primarily for their children, spouse & parents. Moreover, greater demand is expected for children gifts.



Base: Those who are planning to give gifts for Eid
(UAE: 2023 - 453 ,2024 - 478)



On the other hand, a significantly higher demand is envisaged by KSA residents to buy Eid gifts for their children, themselves & domestic workers vs. 2023.



Base: Those who are planning to give gifts for Eid (KSA: 2023 - 459 ,2024 - 478)

A substantially higher segment of UAE residents are planning to give 'home goods & furniture' and 'pre-owned car' as Eid gifts in 2024 vis-à-vis 2023

Gifting plans for 2024 Eid



| | 2023 | 2024 |
|-------------------------------------------------------|------|------|
| Chocolate, Dates, Sweets | 57% | 53% |
| Fragrances | 48% | 53% |
| Money | 48% | 44% |
| Fashion Clothing | 42% | 41% |
| Toys & games | 37% | 37% |
| Gift cards | 38% | 36% |
| Technology/electronics/gadgets (mobile phone, laptop) | 22% | 27% |
| Gold & Diamond jewellery | 28% | 27% |
| Designer accessories (bags/shoes/watches, etc.) | 26% | 26% |
| Cosmetics & Beauty products | 28% | 24% |
| Small home appliances | 15% | 19% |
| Home goods and furniture | 12% | 18% |
| Major electronic devices (white goods) | 13% | 13% |
| Experiences | 10% | 12% |
| Brand New Car | 9% | 9% |
| Pre-owned car | 5% | 8% |



Base: Those who are planning to give gifts for Eid (UAE: 2023 - 453 ,2024 - 478)



Base: Those who are planning to give gifts for Eid (KSA: 2023 - 459 ,2024 - 478)

In 2024, fragrances, sweets & cash continue to be the top three Eid gifting ideas in Saudi Arabia.

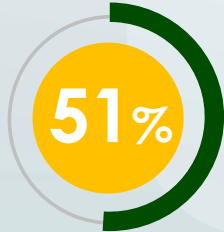
Gifting plans for 2024 Eid



| | 2023 | 2024 |
|---------------------------------------------------------|------|------|
| Fragrances | 58% | 59% |
| Chocolate, Dates, Sweets | 48% | 49% |
| Money | 42% | 48% |
| Fashion Clothing | 33% | 36% |
| Toys & games | 38% | 36% |
| Gift cards | 29% | 31% |
| Designer accessories (bags/shoes/watches, etc.) | 33% | 30% |
| Gold & Diamond jewellery | 24% | 27% |
| Cosmetics & Beauty products | 27% | 26% |
| Technology, electronics, gadgets (mobile phone, laptop) | 26% | 22% |
| Small home appliances | 14% | 14% |
| Home goods and furniture | 13% | 13% |
| Major electronic devices (white goods) | 14% | 10% |
| Experiences | 7% | 9% |
| Brand New Car | 10% | 8% |
| Pre-owned car | 7% | 6% |



2023



2024



... of UAE residents
plan to
spend more
on Eid gifts

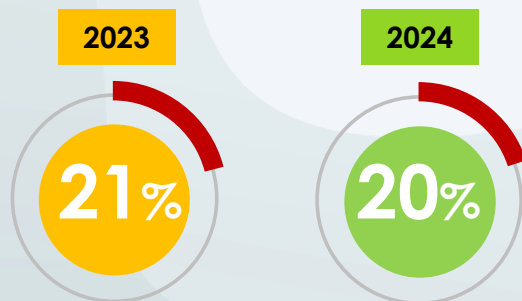
Base: Those who are planning to give gifts for Eid
(UAE: 2023 - 453 ,2024 - 478)

Reasons for spending MORE on Eid gifts...

| | 2023 | 2024 |
|------------------------------------------------------------------------------------|------|------|
| To make Eid more special this year, to compensate for the pandemic years | 48% | 41% |
| Prices are higher than last year, I will have to spend more on gifts | 41% | 40% |
| I choose to spend differently this year - be 'more generous' | 30% | 39% |
| My personal finances have 'improved' compared to past year | 35% | 36% |
| I will buy for 'more people' this year than normal | 33% | 31% |
| I saved more money over the past year, so I want to treat myself & others | 27% | 31% |
| I hadn't seen friends & family as much in recent times, so to do something special | 27% | 23% |

Base: Those who are planning to spend more on Eid gifts
(UAE: 2023 - 233 ,2024 - 255)





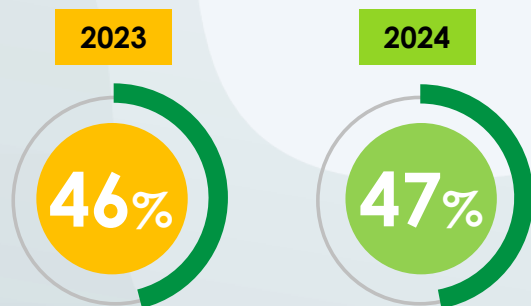
... of UAE residents
plan to
spend less
on Eid gifts

Base: Those who are planning to give gifts for Eid
(UAE: 2023 - 453 ,2024 - 478)

Reasons for spending LESS on Eid gifts...

| | 2023 | 2024 |
|-----------------------------------------------------------------|------|------|
| I want to save money this year | 46% | 34% |
| Prices are higher than last year | 33% | 34% |
| I am concerned about my financial situation in 2024 | 28% | 33% |
| My personal finances have 'worsened' compared to past year | 22% | 30% |
| I choose to spend differently this year - be 'less consumerist' | 32% | 28% |
| I will buy for 'fewer people' this year than normal | 28% | 27% |
| I will not have the time for shopping | 15% | 23% |
| I am concerned about the economic situation in 2024 | 27% | 22% |

Base: Those who are planning to spend less on Eid gifts
(UAE: 2023 - 96 ,2024 - 97)



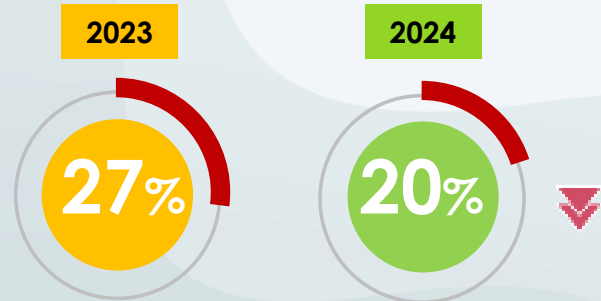
... of KSA residents
plan to
spend more
on Eid gifts

Base: Those who are planning to give gifts for Eid
(KSA: 2023 - 459 ,2024 - 478)

Reasons for spending MORE on Eid gifts...

| | 2023 | 2024 |
|------------------------------------------------------------------------------------|------|------|
| Prices are higher than last year, I will have to spend more on gifts | 46% | 46% |
| I will buy for 'more people' this year than normal | 34% | 38% |
| I want to make Eid more special this year, to compensate for the pandemic years | 39% | 37% |
| My personal finances have 'improved' compared to past year | 35% | 33% |
| I choose to spend differently this year - be 'more generous' | 25% | 27% |
| I hadn't seen friends & family as much in recent times, so to do something special | 31% | 23% |
| I saved more money over the past year, so I want to treat myself and others | 23% | 23% |

Base: Those who are planning to spend more on Eid gifts
(KSA: 2023 - 212 ,2024 - 223)



... of KSA residents
plan to
spend less
on Eid gifts

Base: Those who are planning to give gifts for Eid
(KSA: 2023 - 459 ,2024 - 478)

Reasons for spending LESS on Eid gifts...

| | 2023 | 2024 |
|-----------------------------------------------------------------|------|------|
| I want to save money this year | 28% | 36% |
| I am concerned about my financial situation in 2024 | 28% | 29% |
| My personal finances have 'worsened' compared to past year | 29% | 27% |
| I choose to spend differently this year - be 'less consumerist' | 24% | 26% |
| Prices are higher than last year | 36% | 25% |
| I will buy for 'fewer people' this year than normal | 29% | 23% |
| I am concerned about the economic situation in 2024 | 29% | 22% |
| I will not have the time for shopping | 22% | 15% |

Base: Those who are planning to spend less on Eid gifts
(KSA: 2023 - 122 ,2024 - 96)



EXPECTED MEDIA BEHAVIOUR & COMMUNICATION PREFERENCES DURING 2024 RAMADAN

Compared to 2023 Ramadan, about one-third UAE residents are planning to cut back time spent on Twitter, Facebook & LinkedIn this year.



| 2024 | All figures in % | LESS | MORE | SAME | Don't use |
|-----------|------------------|------|------|------|-----------|
| Twitter | | 34 | 17 | 32 | 18 |
| Facebook | | 32 | 24 | 38 | 7 |
| LinkedIn | | 31 | 18 | 35 | 17 |
| Instagram | | 30 | 25 | 40 | 6 |
| TikTok | | 29 | 23 | 30 | 17 |
| Snapchat | | 29 | 16 | 31 | 24 |
| Telegram | | 28 | 18 | 35 | 19 |
| YouTube | | 27 | 33 | 37 | 2 |
| WhatsApp | | 20 | 35 | 43 | 1 |



On the other hand, KSA residents are thinking of reducing the amount of time spent on Telegram, Instagram, Twitter & TikTok during the 2024 Ramadan vs. last year.



| 2024 | | All figures in % | | | |
|-------------------------------------------------------------------------------------|-----------|------------------|------|------|-----------|
| | | LESS | MORE | SAME | Don't use |
|  | Telegram | 34 | 16 | 40 | 10 |
|  | Instagram | 33 | 20 | 41 | 6 |
|  | Twitter | 32 | 22 | 36 | 10 |
|  | TikTok | 32 | 20 | 34 | 14 |
|  | Snapchat | 31 | 20 | 38 | 11 |
|  | Facebook | 29 | 16 | 37 | 18 |
|  | YouTube | 29 | 25 | 43 | 3 |
|  | WhatsApp | 27 | 25 | 47 | 0 |
|  | LinkedIn | 26 | 14 | 31 | 28 |

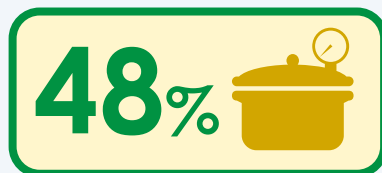




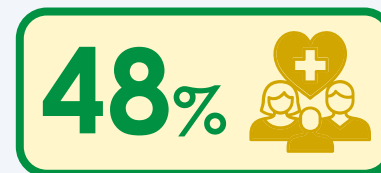
UAE residents are looking to follow the below type of content on social media platforms during the upcoming holy month...



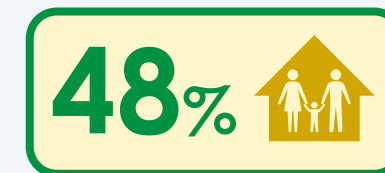
Spiritual/Religious



Cooking recipes



Health & Wellness



Family oriented



39%

Charity/Community Initiatives



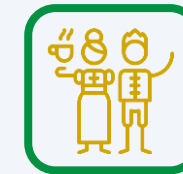
37%

Travel offers
(for upcoming Eid break)



36%

Funny/entertaining



36%

Cultural/traditional
(more in line with Ramadan spirit)



34%

Ramadan Decorations
/home living



33%

Ramadan fashion trends



31%

Beauty/personal care

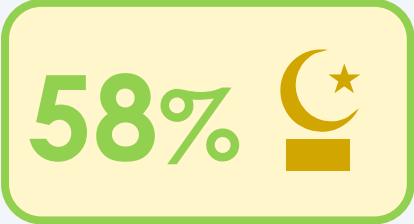


25%

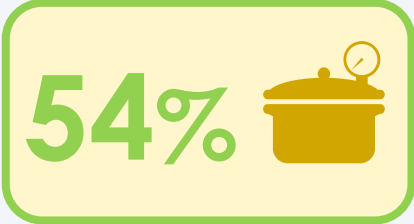
Sustainability initiatives



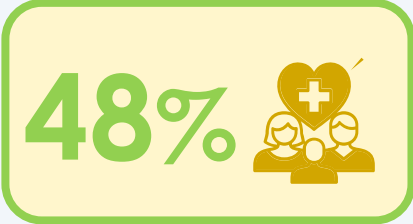
KSA residents are keen on seeing the below type of content on social media platforms during 2024 Ramadan...



Spiritual/Religious



Cooking recipes



Health & Wellness



35%

Cultural/traditional
(more in line with Ramadan spirit)



35%

Ramadan Decorations/
home living



35%

Family oriented



34%

Funny/entertaining



32%

Travel offers
(for upcoming Eid break)



31%

Charity/Community Initiatives



30%

Beauty/personal care



29%

Ramadan fashion trends



19%

Sustainability initiatives



When it comes to brand communications around 2024 Ramadan, a noticeably higher proportion of UAE residents would like to see/hear about content focussing on family values.



| | 2023 | 2024 | |
|-------------------------------------------------------------|------|------|---|
| ⦿ About promotions & offers | 49% | 53% | |
| ⦿ About feeling connected/family oriented | 38% | 45% | ▲ |
| ⦿ About good values/deeds | 41% | 41% | |
| ⦿ Around charity & religious connotations | 41% | 39% | |
| ⦿ Cultural & traditional (more in line with Ramadan spirit) | 42% | 37% | |
| ⦿ Motivational/inspirational | 33% | 32% | |
| ⦿ About convenience | 31% | 31% | |
| ⦿ Around entertainment (enjoyable or funny content) | 31% | 31% | |
| ⦿ About environment friendly/sustainability initiatives | 34% | 27% | |
| ⦿ Focussed on sentimental value | 22% | 23% | |

For the upcoming Ramadan in KSA, residents expect brand communications to revolve mostly around promotions & offers, being connected with family, and charity & religion.



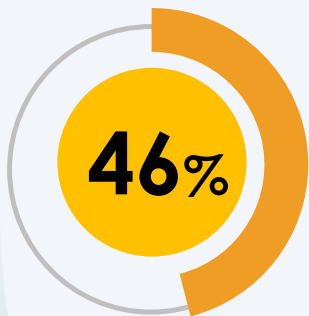
- About promotions & offers
- About feeling connected/family oriented
- Around charity & religious connotations
- Cultural & traditional (more in line with Ramadan spirit)
- About good values/deeds
- Around entertainment (enjoyable or funny content)
- About convenience
- Motivational/inspirational
- Focussed on sentimental value
- About environment friendly/sustainability initiatives

| 2023 | 2024 |
|------|------|
| 50% | 51% |
| 40% | 41% |
| 38% | 40% |
| 35% | 38% |
| 33% | 34% |
| 32% | 32% |
| 30% | 31% |
| 28% | 30% |
| 22% | 25% |
| 26% | 23% |



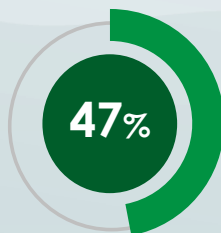


SPENDING PLANS FOR GLOBAL VS. LOCAL BRANDS DUE TO RECENT GEO-POLITICAL EVENTS



...are going to buy the same as before from local & global brands in UAE.

However,



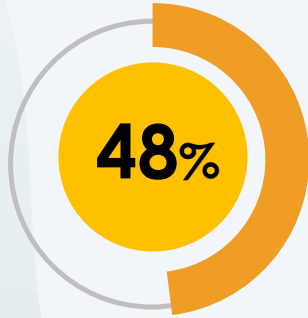
...of UAE residents plan to buy more from local brands



Categories they plan to buy more from local brands...

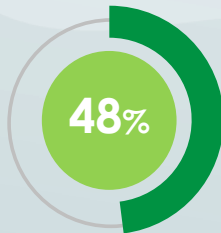
| | |
|-------------------------------------------------|-----|
| Groceries | 64% |
| Apparel (clothing, footwear, accessories, etc.) | 50% |
| Fragrances | 45% |
| Household cleaning items | 42% |
| Dining out/ Fast-food restaurants | 41% |
| Coffee shops | 40% |
| Beauty and personal care products | 39% |
| Home goods and furniture | 35% |

Base: Those who are planning to buy more from local brands
(UAE: 244)



...are going to buy the same as before from local & global brands in Saudi Arabia.

However,



...of KSA residents plan to buy more from local brands



Categories they plan to buy more from local brands...

| | |
|-------------------------------------------------|-----|
| Groceries | 60% |
| Dining out/ Fast-food restaurants | 52% |
| Apparel (clothing, footwear, accessories, etc.) | 51% |
| Fragrances | 50% |
| Coffee shops | 45% |
| Household cleaning items | 40% |
| Beauty and personal care products | 39% |
| Home goods and furniture | 34% |

Base: Those who are planning to buy more from local brands
(KSA: 247)

KEY TAKEAWAYS

Key Takeaways

1

In 2024, greater spending sentiment has been expressed by both UAE & KSA residents on account of Ramadan being an auspicious time for new purchases (vs. 2023).

2

For shopping destination selection, significantly more UAE residents are looking for hassle free returns & multiple payment counters, whereas KSA residents are prioritising convenient location.

3

46% of Middle Easterners plan to spend more during Ramadan & Eid this year (vs. 2023). They find price discounts, bundle offers, free gifts/services & more quantity deals - attractive for shopping.

4

92% are planning to give Eid gifts. About half of them expect to spend more on Eid gifts in 2024 vs. 2023. Chocolates/sweets, fragrances and cash continue to be the leading gifting ideas.

5

A significantly higher segment of Middle Easterners are interested in car loan offers from banks. KSA residents also expect deals on shopping, air travel & signing up for new credit cards.

6

In 2024 Ramadan (vs. 2023), ~1/3rd UAE residents are planning to cut back time spent on Twitter Facebook & LinkedIn and the same is true for Telegram, Instagram, Twitter & TikTok in KSA.

7

Around Ramadan, brand communications in the Middle East should focus mainly on promotions & offers and family values to resonate best with their consumers.

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