


Inside Ramadan

Decoding consumer behaviour & attitudes during Ramadan

A **4SiGHT** Research & Analytics initiative




Study Scope



To understand and capture the unique behavior around the holy month of Ramadan, and the subsequent impact on media habits and consumption. The key areas of exploration include:

- **Prevailing attitudes towards Ramadan**
- **Impact of Ramadan on lifestyle, behavior and attitudes (deep-diving)**
- **Media Consumption, Habits and Motivation in relation to TV, Online and how this is impacted by Ramadan**
- **Tracking use of social media (Facebook, Twitter, Instagram, Snapchat) during Ramadan, including examples and trends of content generation**
- **Impact on Ramadan on the decision making process and path-to-purchase across various categories.**



These areas have been captured across 3 phases of Ramadan – pre, during and post

Approach

Primary Research

Qualitative

- The audience were kept engaged using a variety of interaction points
 - In home interviews
 - Phone interviews
 - WhatsApp chat and groups
- Additionally the audience filled a **media diary** that captured the audiences media intake on a day to day bases.
- All engagement with the panelists across the 3 markets centralized to ensure consistency

Quantitative

- **Face-to-face interviews** was selected as the point of contact keeping in mind the schedules and limitations during the month of Ramadan
- To evaluate a change in habits, attitudes and, hence, mindset during the month that has an impact on consumers' attention span. While surveys using a database are still possible, random consumer surveys over phone during Ramadan is a challenge. With this in mind, we did interviews face-to-face.
- The length of interviews was maintained optimally at 20 minutes




Secondary Research



Desktop research and data obtained from highly credible sources and industry reports from our partners/suppliers

Qualitative Sample



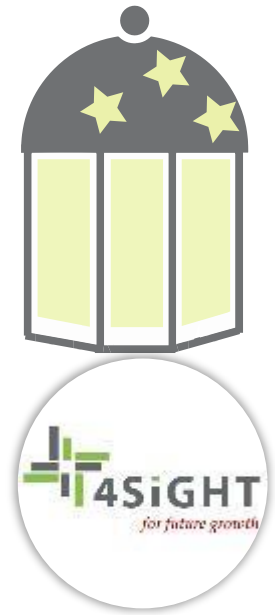
	Youth (15 -18 years)		Female (25-40 years)	Male (25-40 years)	Total
	M	F			
 Saudi (Riyadh & Jeddah)	2	2	3	3	10
	2	2	3	3	
 Emiratis (Dubai & Sharjah)	2	2	2	2	8
	2	2	2	2	8
	2	2	2	2	8
	6	6	6	6	24
 Egyptians (Cairo)	2	2	3	3	10
	2	2	3	3	

The numbers in the chart above reflect the number of respondents who we engaged with over the course of 3 months and across various mediums (such as WhatsApp, phone calls, face-to-face interactions etc...).

Quantitative Approach

	<i>Sample size</i>	<i>Centers</i>	<i>Respondents' profile</i>
KSA	 450 (150) per phase	KSA: Jeddah, Riyadh	<p>All fasting Muslims</p> <p>Age group: youth (15-20 years), adult male (25-40 years), adult female (25-40 years)</p> <p>Nationality: Locals in KSA and Egypt; Emiratis, Expat Arabs and Expat Asians in UAE</p>
UAE	 600 (200) per phase	UAE: Dubai/Sharjah, Abu Dhabi	
Egypt	 450 (150) per phase	Egypt: Cairo, Alexandria	

PREVAILING ATTITUDES



What is being said about Ramadan is gradually evolving...



Ramadan has become less spiritual and more festive



OUTWARD
DRIVEN
SPIRITUALITY

INWARD
SPIRITUALITY



CELEBRATION/
FESTIVITY

DEVOUTNESS



EXTRAVAGANCE
SHOWING
OFF

MODESTY



INDEPENDENT
LIVING

COMMUNAL
LIVING



EATING OUT/
CATERING/
ORERING IN

COLLECTIVE
HOME FOOD



MEDIA
LEARNINGS
ABOUT
RAMADAN

ELDERLY
LEARNINGS



EXCESSIVE
FOOD
CONSUMPTION
(OVER
INDULGENT)

CONTROLLED
FOOD



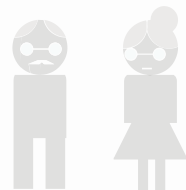
GAINING
MORE
MAXIMIZING
LIFE

GIVING
MORE

64%

agreed that the spiritual meaning
of Ramadan has been lost

YouGov MENA research, 2014



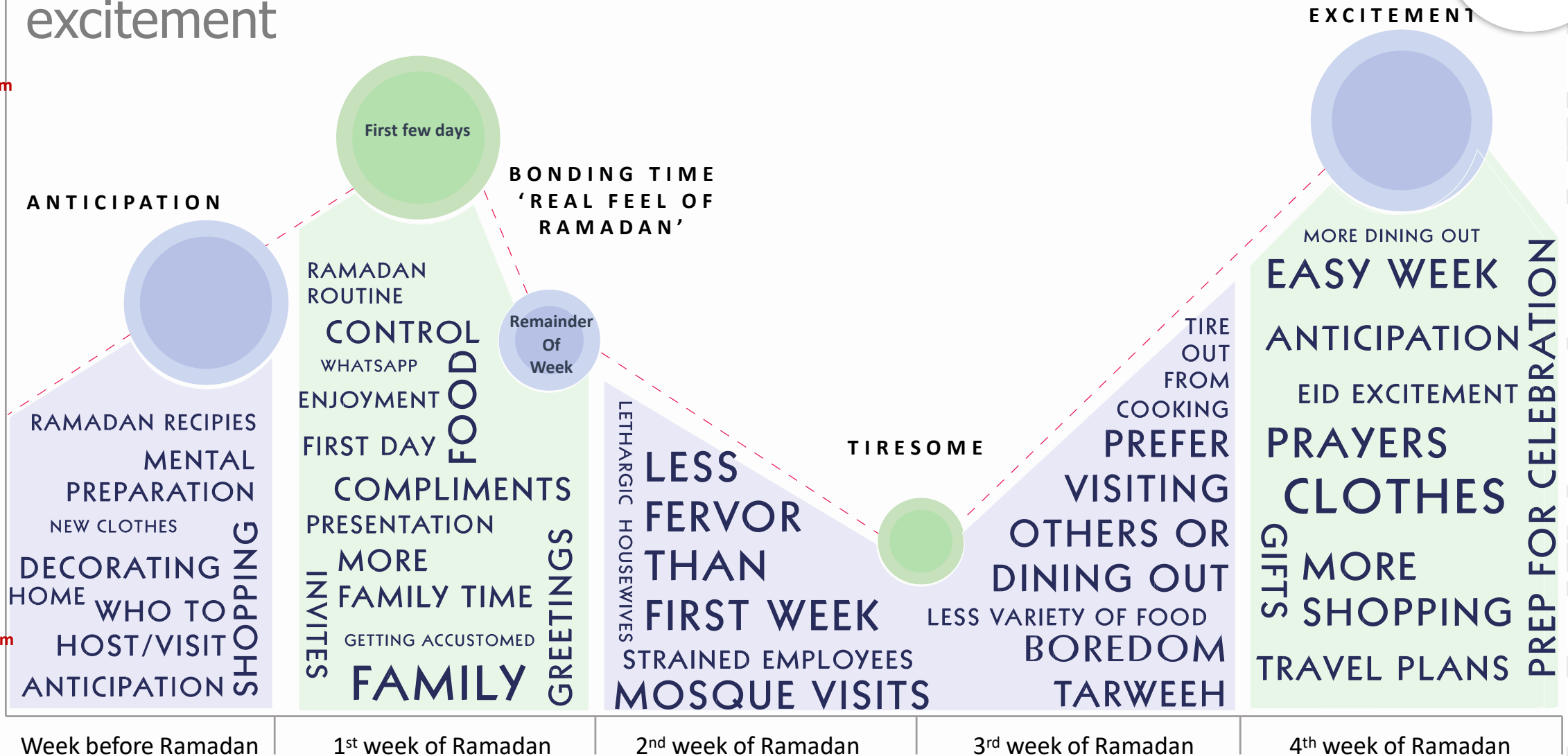
*"Higher concern amongst older generation
that feel that the sentiment behind Ramadan
is getting diluted. More consideration given to
the celebration rather than the spirituality"*

74%

stated that Ramadan is
becoming more commercial

YouGov MENA research, 2014

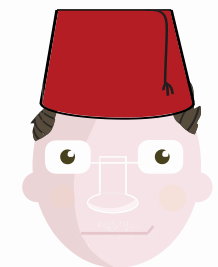
Beginning & end of Ramadan usually witness the most excitement



Involuntarily Ramadan has become a time for indulgence and showcasing finest cooking talent & creativity



"If my friends come over and compliment me it is like everything is worth it"
- Dubai, Emirati, 34 y, F



"Ramadan is about simple living and connecting with God"
- Cairo, Egyptian, 34 y, M

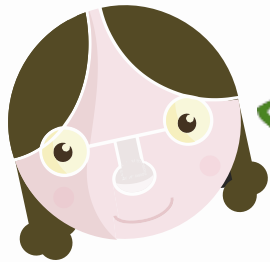
As much as respondents set out with the intention to eat better during Ramadan (for religious & health reasons), it is not a key concern as abstinence and deprivation from food for so long acts as a justification to over indulge



- This need comes from increasing competition among women to host the best iftars, feeding into the **extravagance of the New Age Ramadan**
- With that being said, they also seeking convenience and easy recipes as they **don't want to feel burdened by the chores associated with cooking**



MEDIA CONSUMPTION HABITS



"Nowadays Ramadan is all about food, shopping and TV...we eagerly wait for the Ramadan TV programs"

Jeddah, Saudi, 30, F



"Since Ramadan is all about connecting with people you tend to spend more time on Whatsapp, Twitter or FB"

Dubai, Emirati, 18, M

People tend to consume more media during Ramadan in comparison to other parts of the year



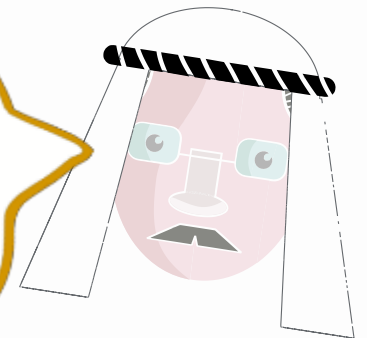
"Catching up on TV shows is crucial during Ramadan whether it's online or through TV on demand"

Cairo, Egypt, 40, F

Social media increasingly functions as the "second screen", allowing audiences to interact with the content they are consuming*

"Ramadan feels like a long holiday – and just like any holiday you will naturally spend more time watching TV or surfing the web"

Jeddah, Saudi, 34, M



TV viewing in Ramadan is more than just entertainment – It’s a collective bonding experience

TV viewing outside of Ramadan – entertainment/time killer

- Occasional joint viewing
- Less focused/background noise
- Less socializing
- Less lengthier session
- Genre choice more individually driven
- Around meal plans (lunch, snacking or dinner)
- Time filler/killer

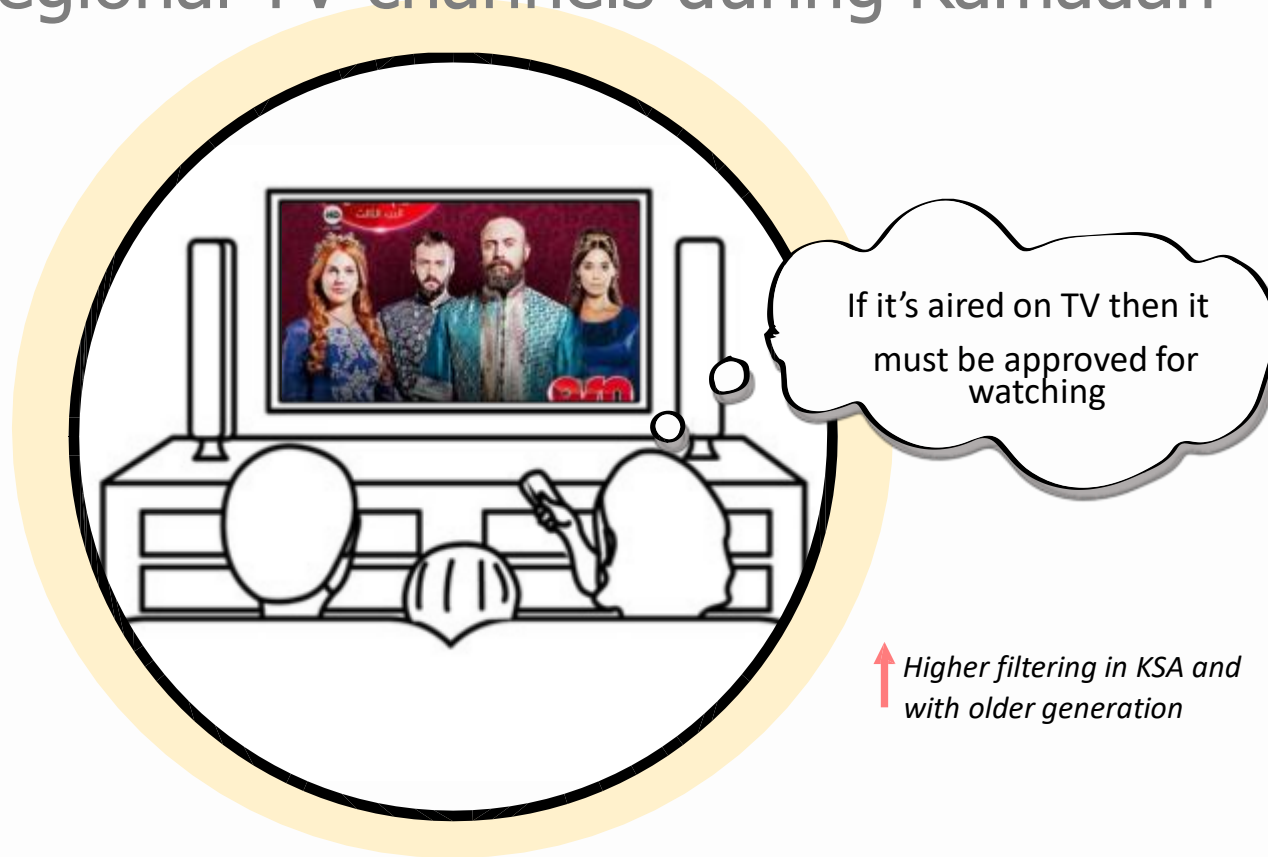
TV viewing during Ramadan unifying

- Frequent joint viewing
- More focused
- More social and discussions on TV content
- Extended viewing session
- Collective genre choice
- Extended grazing session
- Brings people together

DAY TIME VIEWING BEHAVIOR during Ramadan is similar to normal TV viewership

Talk value – Look for shows that can feed this active engagement, discussion and debate

There's a general tendency to watch whatever is aired by regional TV channels during Ramadan



“The TV industry only cares about money. If they keep making these shows, it obviously means that people are watching them when they shouldn't be”

When it comes to Ramadan shows respondents agree that lines have become blurred between what is acceptable and what is not. However, broadcasters hold the upper hand and tend to give consumers a general vibe of acceptance



"Some companies in the region **spend up to a third or more of their advertising during Ramadan**" –

Pan Arab Research Center '13

Ramadan nicknamed as super bowl for adverts in the Middle East
But does that make it the ideal time for brands to advertise on TV?

*"Leading telecom companies can **spend anywhere between \$40-50 million during Ramadan**" –*

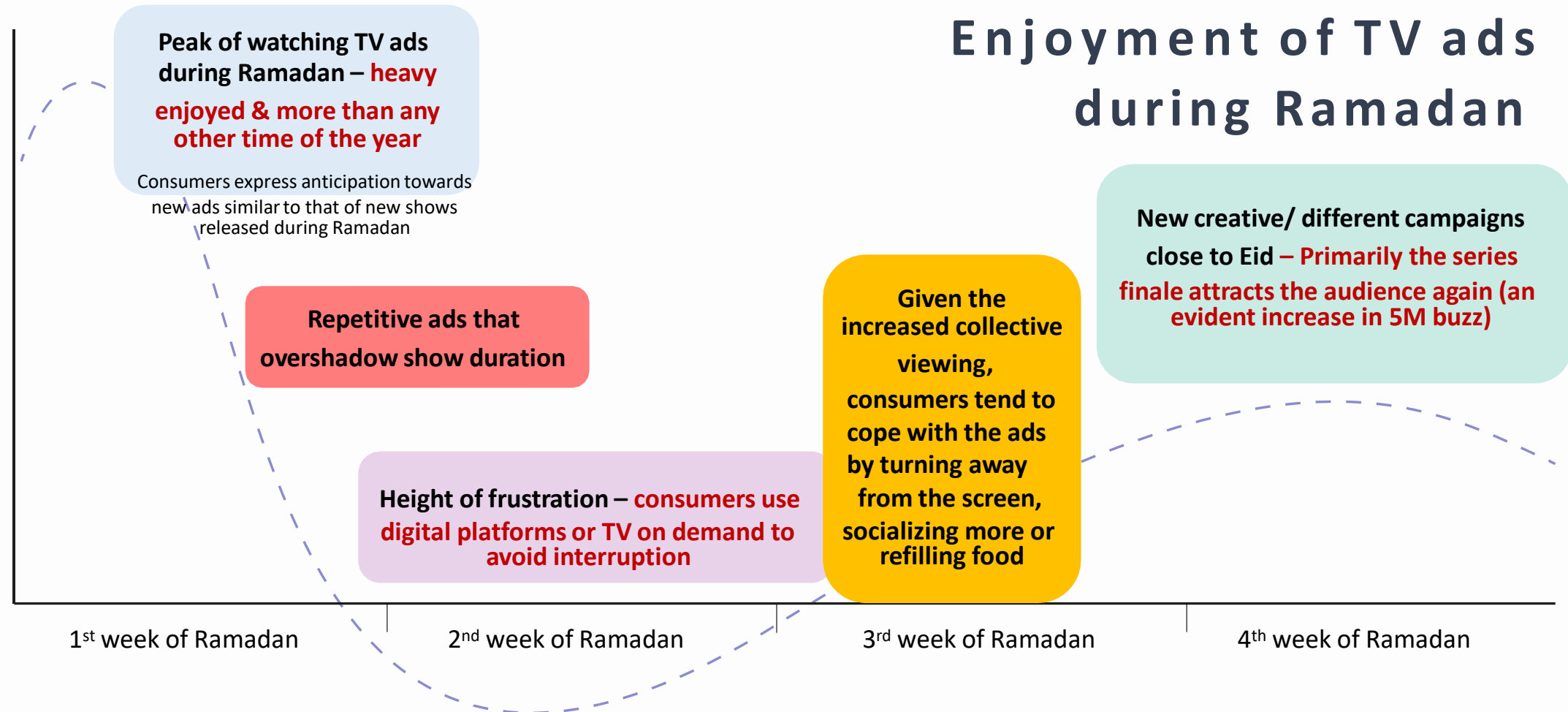
Marketing Insight 360 '13

While the super bowl is a one day event, Ramadan extends for a month – bound to have its own implications on consumers

High
Enthusiasm



Low
Enthusiasm



The major players in Ramadan have an integrated approach and has helped them become synonymous with Ramadan



HENCE THERE IS A LOWER RECALL AND CONNECT WITH BRANDS THAT FOCUS ALL OF THEIR EFFORT ON RAMADAN GREETINGS/ CONTEXT

TV OPERATES IN A CONVENTIONAL WAY ... BUT DIGITAL IS **DISRUPTING**

83% of Arab Millennials use the internet
daily, 78% prefers internet to TV

Communicate, 2015

Ramadan is facing a large demand for digital content

Digital consumption increases by 30-40% during Ramadan

78% of Arab millennials prefer internet to TV

Website traffic increases by 10%-15%

Mobile occupies more than 35% of time spent on screen

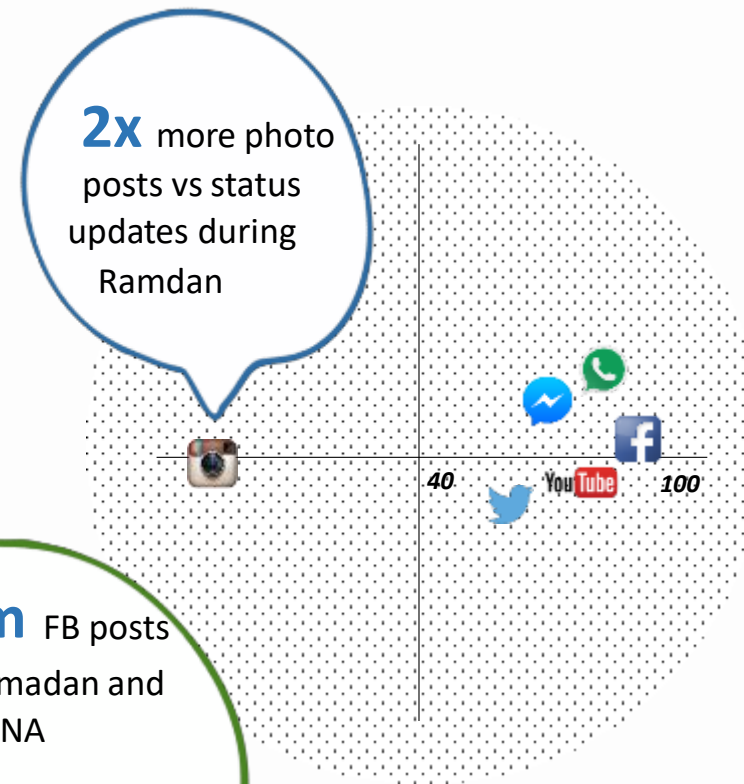
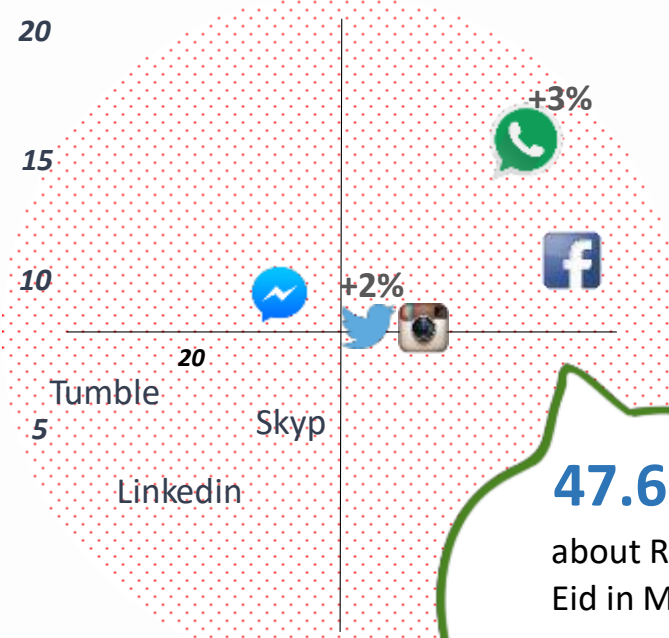
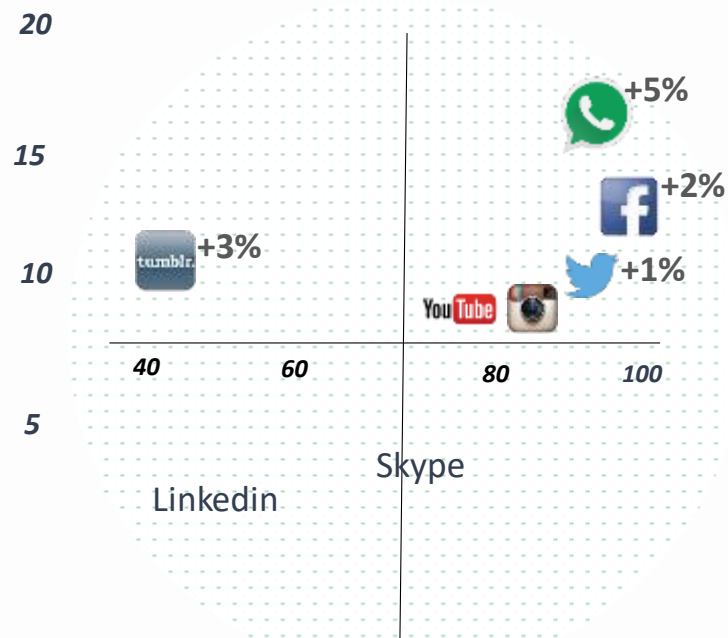
Amongst UAE & Saudi consumers total screen time comes in at 418 minutes, 73% of this online

Food & recipes were the most popular advertising content

Search volume for recipes by women double during the month of Ramadan

With an increased usage of Whatsapp, Facebook, Twitter & Instagram during the month of Ramadan

Share of frequency (per week)



2x more photo posts vs status updates during Ramadan

47.6m FB posts about Ramadan and Eid in MENA

14.6m people in MENA talking about Ramadan & Eid on FB

Incidence (during Ramadan)

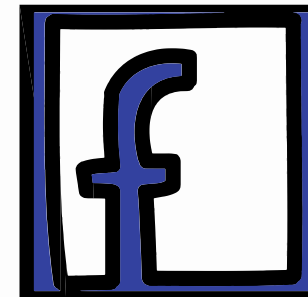
Examples of Whatsapp and Facebook use



Messages pertaining to seasonal greetings spread fast



- Interestingly, these were made comic to as to not offend anyone sensibilities
- These were shared only within a closed group

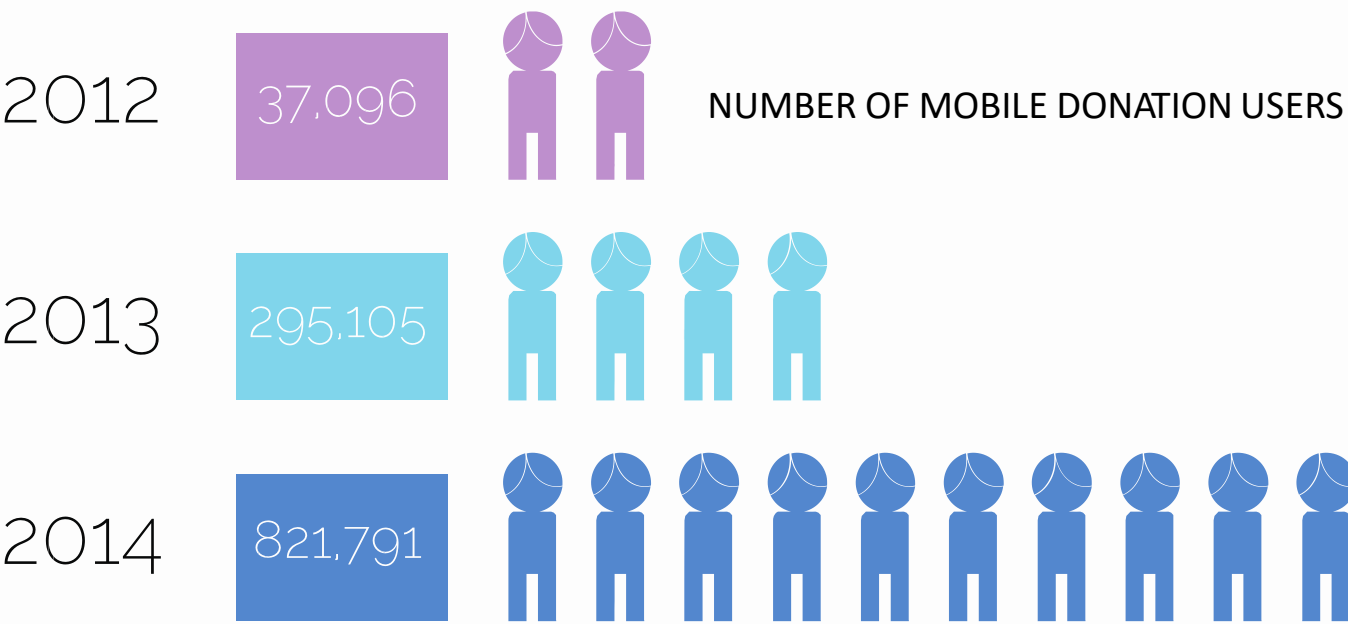


SHOPPING, BRANDS & COMMUNICATION

Purchase behavior closely linked to Ramadan’s rooted traditions cont’d.

Interestingly charity is being driven more through mobile technology during Ramadan with over \$1.5 million donated in 2014 in Egypt





Digital Strategy Consulting, 2014

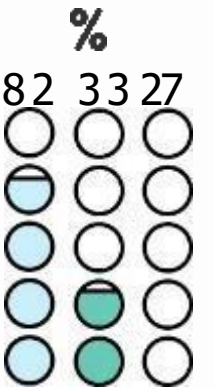
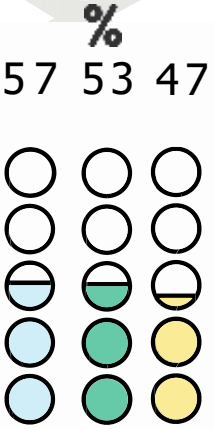
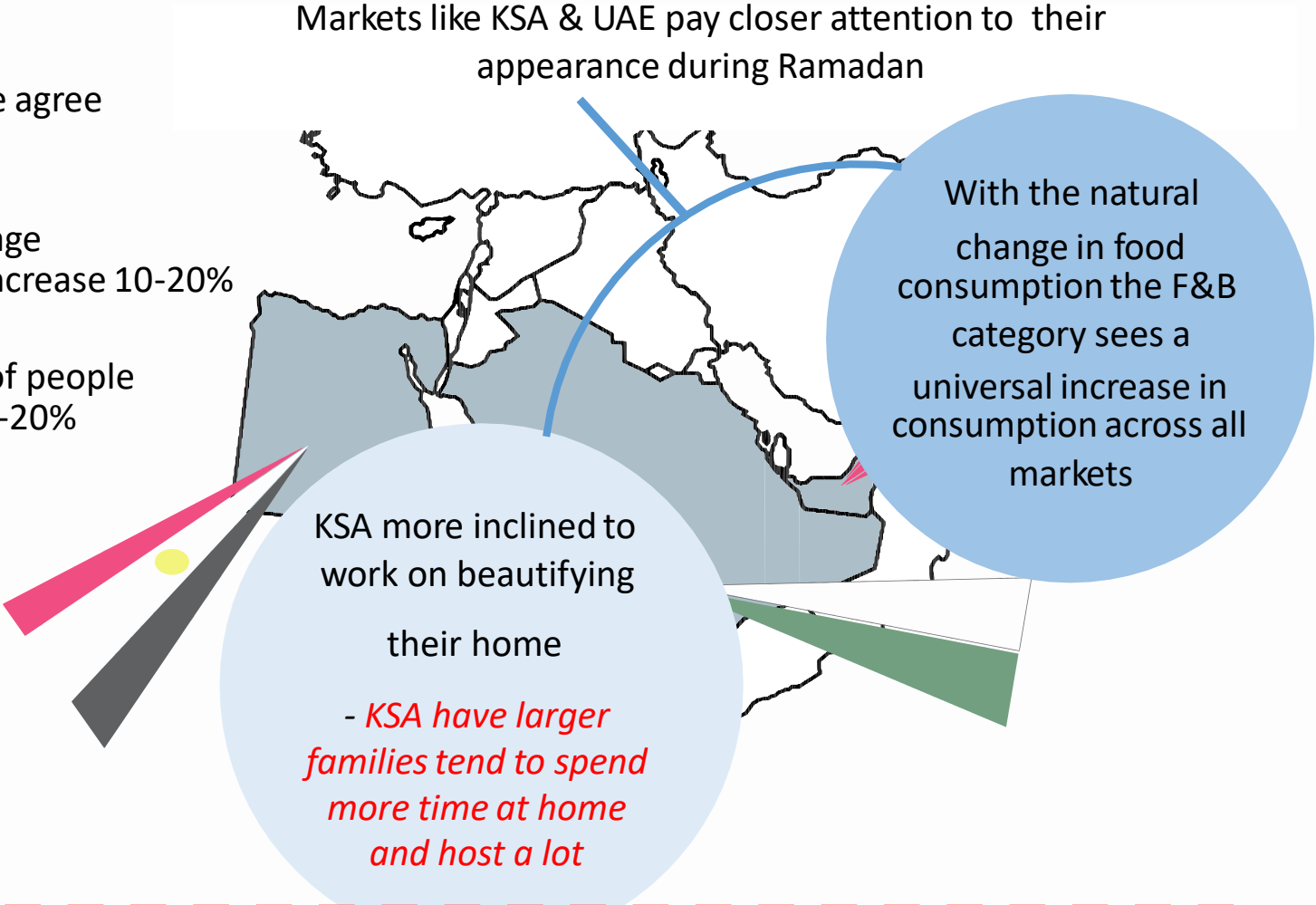
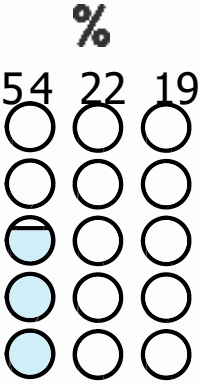


Many reasons account to this change:

- Spending high on food and groceries as people spend most of their time at home
- Prepare and consume a large variety & quantity of food during iftar
- Distribute food among their families, friends as well as the needy
- Purchase specific types of food not normally purchased outside of Ramadan
- People get carried away by the sales and promotion packs

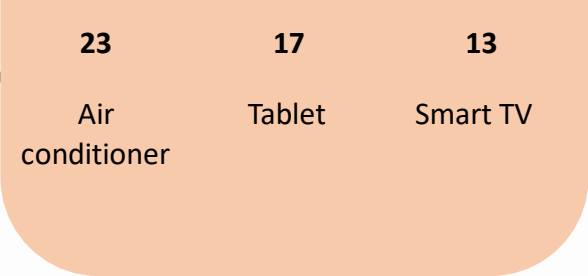
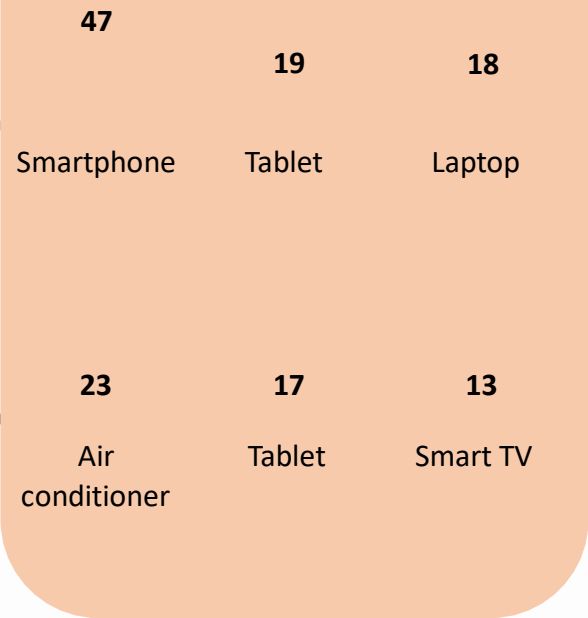
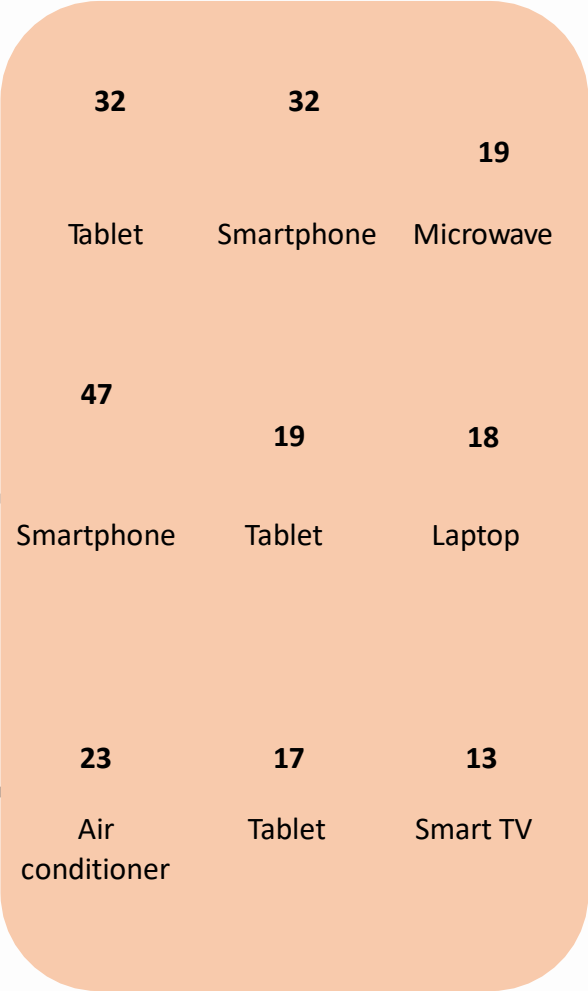
With a variance between markets except for the F&B category which naturally rises during Ramadan

-  F&B – Percentage of people agree spending increase 10-20%
-  PERSONAL CARE – Percentage of people agree spending increase 10-20%
-  HOME CARE – Percentage of people agree spending increase 10-20%
-  NO CHANGE

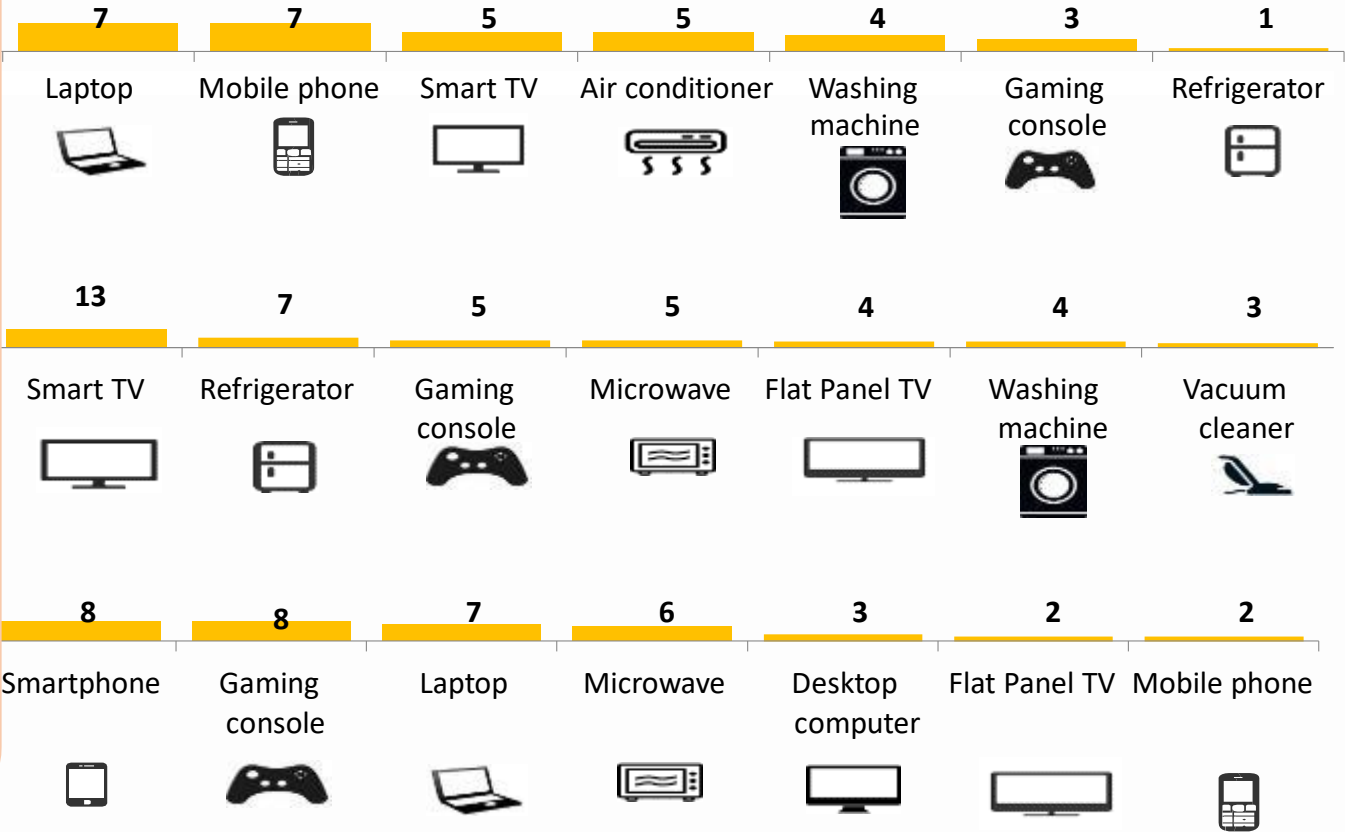


UAE shows the highest increase in spends and could be due to the fact that they are more inclined to eat out in restaurants which naturally results in higher expenses

Consumers across the region intend on purchasing electronic gadgets & household appliances during Ramadan

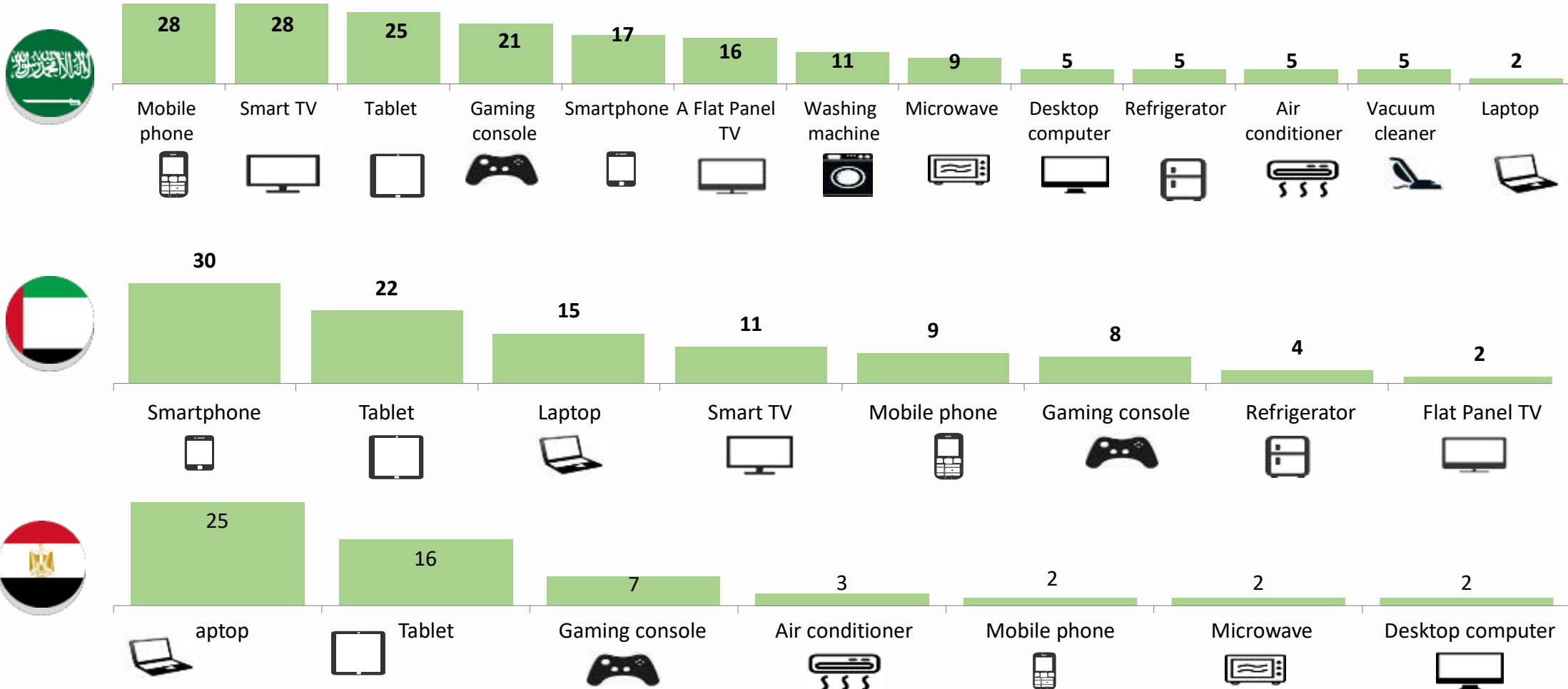


Device intended to purchase during Ramadan (%)



Purchase behavior reveals a preference to electronics as well as gaming consoles

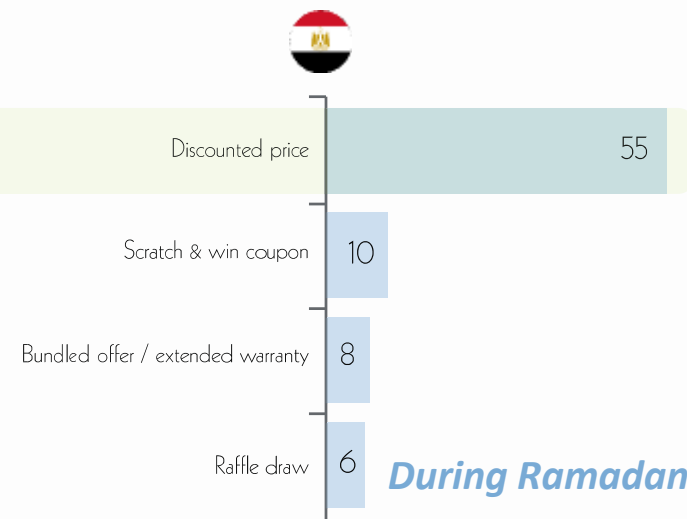
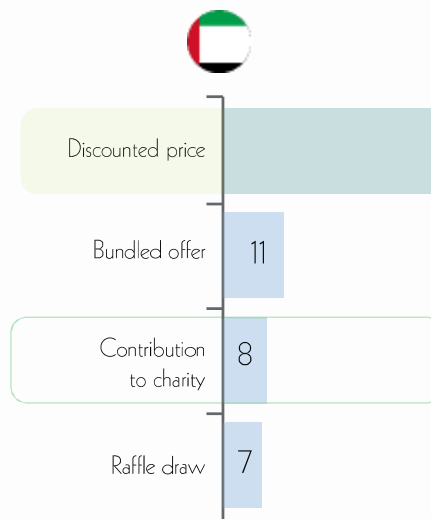
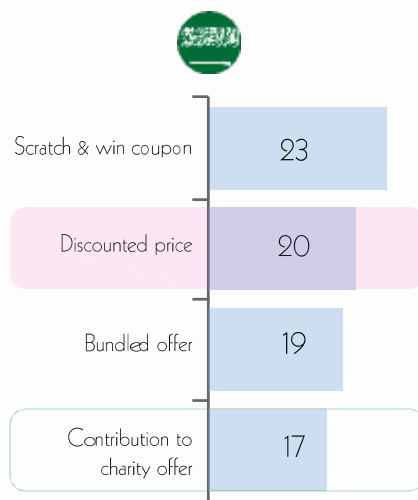
Device purchased during Ramadan (%)



Impact of deals can drive consumers to favor wants over needs – gadgets are more image driven than home appliances

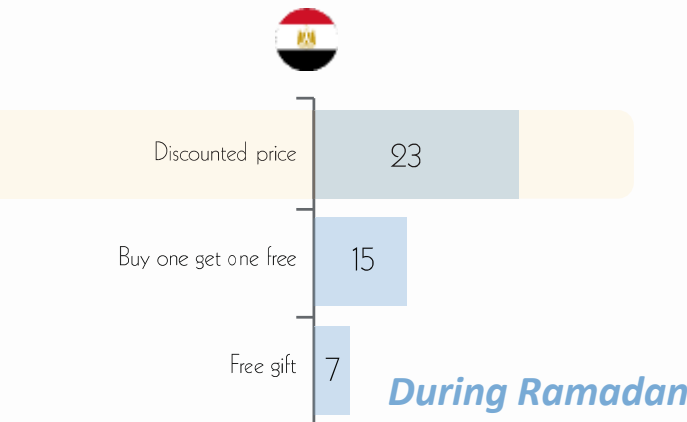
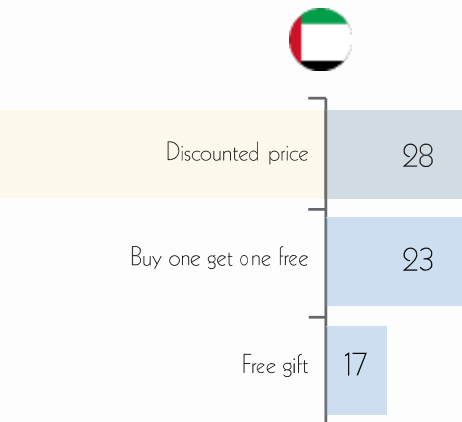
It comes as no surprise that consumers across all markets are actively seeking discounted prices during the month of Ramadan

Preference with regards to deals & offer on technological devices



During Ramadan

Preference with regards to deals & offers on F&B, personal & home care items



During Ramadan

There's been an evident increase in online spends due to the rise of digital & mobile use

Studying digital consumer patterns last Ramadan, Criteo reported a 23% rise in retail sales and 42% increase in online travel transactions for the most important month in the Muslim calendar

Overall, the Ramadan month is a high season for online sales. Last year, they shot up 28% on average across all verticals in the United Arab Emirates

Consumers favor shopping online vs. malls as they are more inclined to spend time at home with the family during Ramadan

70% of e-commerce purchases are settled with cash on delivery

Consumers openly express the difficulty of shopping in malls during Ramadan – tiresome during daytime fasting + after Iftar social obligations

Gifting happens across two main occasions, Ramadan & Eid



COMMON ACROSS MARKETS

Perfume 34% 26% 26%



Chocolates 28% 20% 53%



Other foods (dates, savoury, cookies) 9% 32% 43%



Sweet 13% 22% 40%



RAMADAN:
Primarily something to take along when they visit other people

REGION SPECIFIC

25% Electronic gadgets



29% Electric (like TV, Microwaves)



24% Home ware (such as cooking pans)



29% Decorative Items



18% Cash (younger are gifted 'Eidiah'-festival money- from the older during Eid)



EID:
Gifting generally more personal and of higher monetary value

- KSA consumers are more inclined to gift decorative items, electronic gadgets & appliances as well as home ware
- UAE inclined to gift cash amount
- KSA respondent more willing to spend higher which explains their choice of gifts

- Food but most importantly indulgent food choices dominate gifting occasions
- Favourability towards perfume – easy gifting choice and universally liked

- 65% of KSA respondents are willing to spend anywhere between AED 750 – 1500 on gifting
- 36% of UAE respondents are willing to spend anywhere between AED 500 – 1000 on gifting

Media Implications (Lifestyle)

- Excitement levels during Ramadan go through ups and downs and brands need to be more proactive during periods of low excitement
 - Brands need to be able to sustain momentum during the month of Ramadan and drive excitement during lull weeks
 - Storytelling approach on digital to maintain excitement with a longer form on desktop and shorter form on mobile (video &
 - Changing creatives on TVC & digital (more specifically sequential creative targeting on digital platforms)
- Similar to excitement levels consumers also witness dips and peaks in energy levels and could be a great opportunity for day time
 - Day time targeting for housewives that are looking for recipe inspirations (during peaks hours of their day)
- Ramadan is primarily about collective experiences but there's also a small time bracket to speak to consumers alone
 - Staying up late is quite predominant during Ramadan and brands that do not fall under the collective experience can use this as an ideal time to speak to their consumers alone (i.e. e-commerce platforms: gifts & personal shopping especially for clothing and beauty brands)

Media Implications (Lifestyle) 2

- While traditional dishes are still at the core of their meal consumption, consumers' iftar options are expanding and are entailing more creativity & fusion
 - This could be a great opportunity for FMCG brands that want to **fuel creativity and inspire their consumers**
 - Most consumed food items in Ramadan are quite indulgent in nature but are also used extensively for cooking and food preparations. Brands need to pay closer attention as to how their products are used and mirror that in their creatives (complimented with cooking preparations vs. advertised alone)
- UAE & KSA more skewed towards hosting extravagant iftars whereas Egypt tends to be less extravagant and more simple
 - Differences between markets could uncover an opportunity for brands to tailor their creative for each market (extravagant vs. simple/traditional)

Media Implications (Media consumption)

- TV viewership is a collective bonding experience and brands need to own their spot in the living room
 - Talk value is crucial and brands need to be able to fuel these discussions and heighten engagement with their consumers
- Youth tend to spend more time alone outside of Ramadan & are now obligated to stay with their family, might grow frustrated over the course of Ramadan?
 - Engaging youngsters through digital platforms is important – although they are spending time with their family
- Associations consumers might have between controversial shows and advertisements
 - Brands need to explore the potential impact that TV content might have on their brand image – does it inflict any negative perceptions?
- Brand that have become synonymous with Ramadan
 - Ramadan is a peak purchasing period but does your brand need to heavily advertise during Ramadan? Brands that have become synonymous with Ramadan also manage to find a way to integrate themselves within the culture Ramadan.

Media Implications (Media consumption)

- Promotional ad campaigns are gradually losing impact on consumers
 - Promotions are still crucial during Ramadan but when it comes to TV advertisements consumers are more engaged with brands that are taking a more storytelling approach. There's still room for brands to push promotions – which could come in during low periods of excitement but in general brand equity building campaigns should always dominate during Ramadan
- Due to its more personal use Whatsapp is the most favored social media platform during Ramadan, how can brands leverage this?
- There's a clear difference in favored content online which also changes over the course of Ramadan
 - Females are more captivated by beauty, family/home related content while males are more captivated by entertainment, sports & news. As well search trends change over the course of the month, brands can plan their campaigns according to consumers' lifestyle needs & interests during specific times of the month

Shopping, brands and communications

- Charitable donations are more sought after during Ramadan
 - Charitable institutes dominate the screen during Ramadan and are even providing digital solutions
 - Brands can also create a system for consumers to donate money (vs. brands donating the money themselves)
- Consumers online shopping behavior changes throughout the course of the month as well as their day
 - Day time targeting for online shopping should happen post iftar
 - Brands present on e-commerce platforms should factor in the shift from desktops to mobile
 - The month of Ramadan goes through it's own periodic phases – and that also influences the type of purchases

THANK YOU

