



SIGHT **for GROWTH**

a monthly series

**Mobile Apps
rewrite the
Digital Playbook**

JULY | 2025



The mobile app landscape in the Middle East has seen tremendous transformation, driven by **technological innovation, increased user engagement, supportive government initiatives** and **a shift towards integrated digital solutions.**

As of 2024, the Middle East and Africa (MEA) mobile application market generated approximately **\$12.45 billion** in revenue, accounting for about **5.4% of the global mobile app market.**



The Evolution of Mobile Apps

Basic apps like calculators, calendars, and classic games (e.g., Snake) with focus on practicality, offline use, and simple features.

EARLY DAYS (1990-EARLY 2000)



LAUNCH OF APPLE APP STORE (2008)

A Wave of Third-Party Applications

- From gaming to social media
- The initial wave of mobile-first startups



- **Faster** smartphones, enhanced performance
- Cloud integration for **seamless data access**
- Location-based services (e.g., Uber, Google Maps)
- Mobile payments for **streamlined transactions**
- **Enhanced communication** through social media and messaging

RISE OF SMART APPS (2011-2015)



- **Super Apps** → Platforms like WeChat and Careem combine services like payments, shopping, and mobility.
- **Growth Areas:** Significant expansion in fintech, health-tech, and edtech applications.
- **Innovations:** AR/VR applications and foldable phones are enhancing user experiences.
- **Focus on Sustainability:** Increased emphasis on sustainability-oriented platforms.

Key Considerations → **Privacy, data protection, and ethical design are crucial in tech development.**

SUPER APPS AND ECOSYSTEM INTEGRATION (2021-PRESENT)



FUTURE TRENDS

- AI-native applications
- Integration with wearables
- Immersive AR/VR experiences
- Enhanced cross-device interactions



The **World of mobile apps** in the Middle East

As compared to the Western markets which have slightly plateaued, Middle East, Asia & Africa is seeing a rapid growth in mobile app usage driven by a young population.

Our region has also seen a massive surge in mobile payments, growth of super apps & quick adoption of emerging tech integration.



Factors impacting the boom of Mobile App in the Middle East

SURGE IN APP DOWNLOADS AND USAGE

In 2022, Saudi Arabia saw over 30 million new app downloads, a 30% increase from the previous year. Users spend an average of 5.5 hours daily on mobile apps, reflecting high engagement.



DOMINANCE OF E-COMMERCE AND FINTECH APPS

Mobile commerce is thriving, driven by leaders like Noon and Amazon.ae. Digital wallets such as STC Pay, Apple Pay, and Google Pay are increasingly popular, particularly in the UAE and Saudi Arabia.



INFLUENCE OF THE 'RAMADAN EFFECT'

During Ramadan, mobile app revenues in the Middle East exceeded \$1.7 billion, marking an 18.6% year-over-year increase, with notable growth in shopping and finance apps.



RISE OF SUPER APPS

Companies like Astra Tech are creating 'ultra apps' such as Botim 3.0, which combine services from messaging to financial transactions. Additionally, Yango Play has been introduced as an entertainment super app in seven MENA countries.



INTEGRATION OF EMERGING TECHNOLOGIES

Mobile apps are increasingly using AI, AR/VR, and blockchain to improve user experiences, with Dubai leading the way through immersive AR experiences and voice-activated interfaces.



EXPANSION OF 5G AND IOT APPLICATIONS

The rollout of 5G networks enables real-time data processing apps. Smart city initiatives are utilizing IoT-integrated apps for traffic management and energy monitoring.



EMPHASIS ON PERSONALIZATION AND AI-DRIVEN CONTENT

Apps leverage AI for personalized content, boosting user engagement and satisfaction, especially in entertainment, where recommendations are tailored to individual preferences.



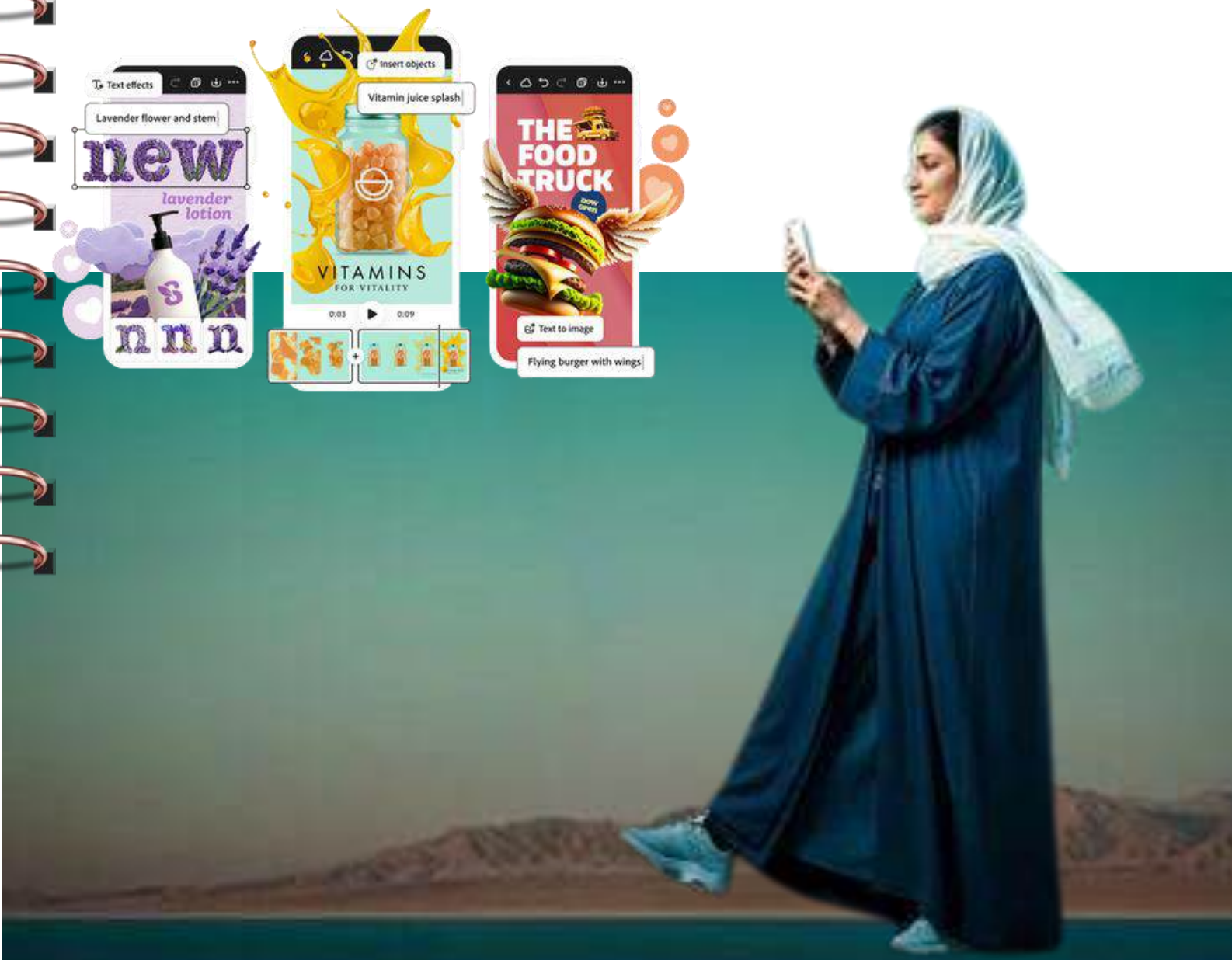
GROWTH IN INFLUENCER AND AFFILIATE MARKETING

Influencer marketing is playing a pivotal role in app promotion, with detailed insights into pricing and impact becoming more prevalent.



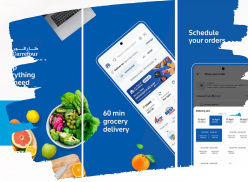
Today, **Consumer behavior** around mobile apps reflects a **tech-savvy, convenience-driven**, and increasingly **digital-first population**.

With "**Mobile-First**" as the New Normal, most consumers now interact with brands primarily through mobile apps, from shopping to banking to entertainment.



Here are the **top consumer trends** shaping mobile app usage in the region:

Trend 1



"SHOP, TAP, REPEAT" : THE M-COMMERCE BOOM

Trend 2



"BANKING IN YOUR POCKET": DIGITAL PAYMENTS DOMINATE

Trend 3



"STREAM IT ON THE MOVE": VIDEO & ENTERTAINMENT ON-THE-GO

Trend 4



"GAME ON... ANYTIME, ANYWHERE, ANYONE": GAMING APPS SEE CROSS-DEMOGRAPHIC APPEAL

Trend 5



"SWEAT, BREATHE, REPEAT": RISE IN WELLNESS, FITNESS & MENTAL HEALTH APPS

Trend 6



"SPEAK TO ME & IN MY LANGUAGE": MULTILINGUAL & PERSONALIZED EXPERIENCES

Trend 7



"PAY ME BACK": LOYALTY & REWARD PROGRAMS DRIVE APP USAGE

Trend 8



"I NEED YOU WHERE I AM": LOCATION-BASED SERVICES ARE POPULAR

Trend 9



"ZERO CHILL FOR A BAD EXPERIENCE": LOW TOLERANCE FOR POOR UX

Trend 10



"CLICK WITH CAUTION": GROWING PRIVACY AWARENESS

Trend 1

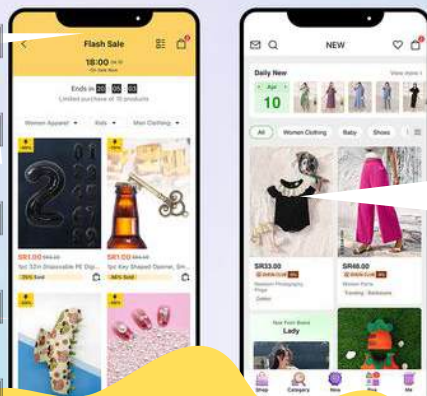
“Shop, Tap, Repeat” The M-Commerce Boom

The M-commerce (mobile commerce) boom in the Middle East is one of the region's **most dynamic and rapidly growing digital trends**.

With some of the **world's highest smartphone penetration rates** and a young, tech-savvy population, the **region is witnessing a dramatic shift from traditional e-commerce to mobile-first shopping experiences**.

EXCLUSIVES

Find out about exclusive offers and the latest collabs before anyone else!



M-commerce in the GCC is projected to surpass **\$20 billion by 2025**, with Saudi Arabia and UAE at the forefront.
Retailers lacking a robust mobile presence may miss out on 60-70% of potential digital sales.



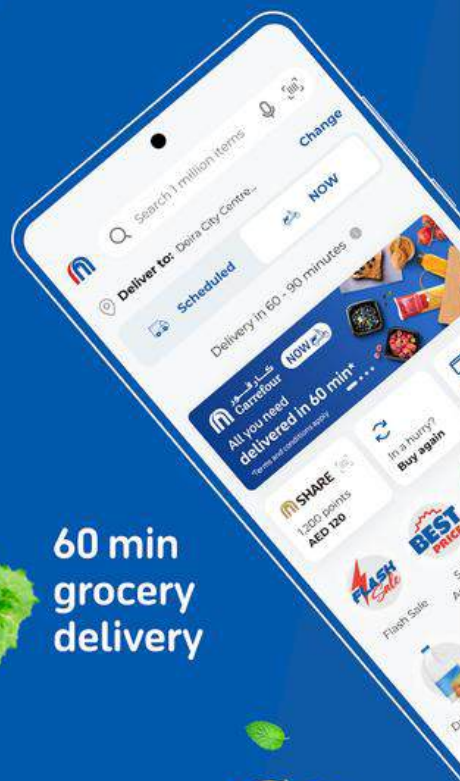
NAMSHI and SHEIN integrate Instagram Shop, allowing users to browse collections and purchase without leaving the app..

كارفور Carrefour

Shop everything you need



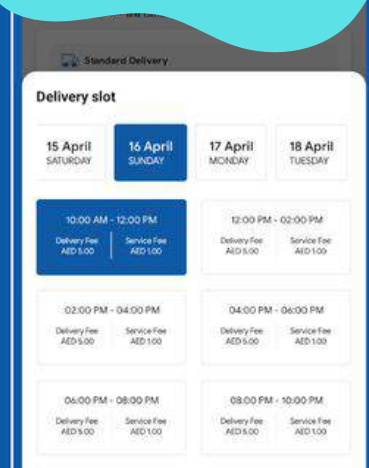
**60 min
grocery
delivery**



Schedule your orders

Consumers prefer **in-app purchases over websites**, especially during campaigns like Ramadan.

High trust in local players like **Noon, Talabat, and Carrefour app**, thanks to localization, Arabic support, and fast delivery



Trend 2

“Banking in your pocket” Digital Payments Dominate

This trend reflects a powerful shift in how consumers transact — moving away from cash and cards towards seamless, secure, mobile-first payment methods. There is a surge in usage of **mobile wallets, contactless payments, QR codes, and in-app transactions**. This is driven by both consumer preference and national digitization agendas.

Wallet pioneers Voice AI technology for seamless and secure payments



AI-powered virtual assistants such as **Emirates NBD's EVA™**, **Mashreq Bank's AI chatbot**, and **Salma AI's Virtual Financial Assistant (VFA)** are increasingly leveraging voice interfaces.

stcPay (KSA – part of STC Group): A leader in Saudi digital wallets, backed by the telecom giant, with massive merchant adoption and universal QR standards via MADA.

Barq (Saudi fintech providers): Offer competitive, app-based wallet services tailored for consumers and SMEs

Affordable for Shoppers.
Profitable for You.



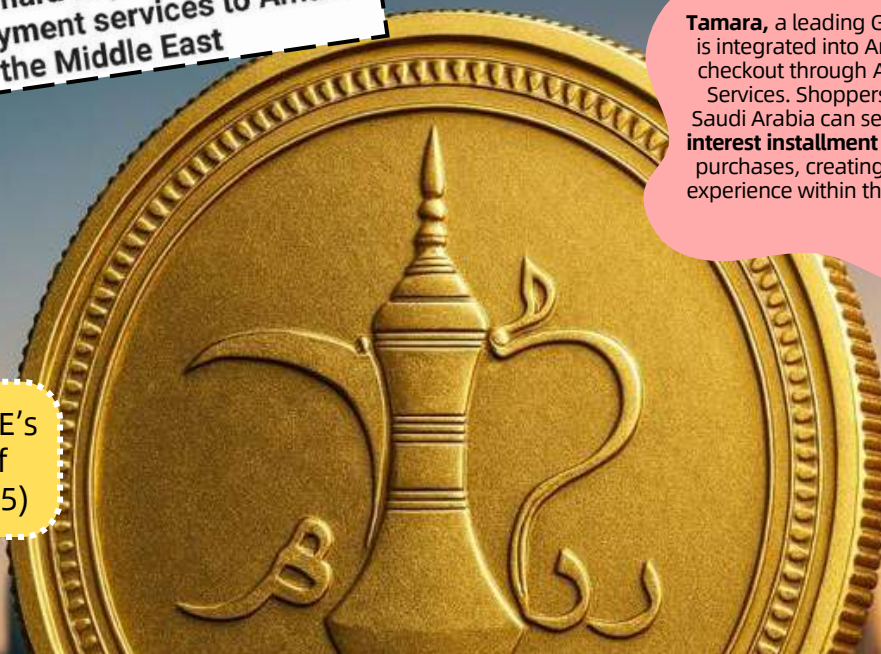
is now available on

amazon payment services

Tamara to provide BNPL payment services to Amazon in the Middle East

Tamara, a leading GCC BNPL provider, is integrated into Amazon's regional checkout through Amazon Payment Services. Shoppers in the UAE and Saudi Arabia can select **zero- or low-interest installment plans** during their purchases, creating a BNPL-enabled experience within the **Amazon wallet**.

Digital Currencies like UAE's CBDC project (launch of Digital Dirham in Q4 2025)



Trend 3

“Stream it on the move”

Video & Entertainment On-the-Go

This trend reflects a massive cultural and behavioral shift in how people consume content—**anytime, anywhere, from the palm of their hand.**

Consumers, especially younger generations, are **watching TV shows, series, vlogs, and reels** not on the couch—but on their commute, during breaks, while cooking or even while multitasking.



Why the future of streaming in MENA lies in hyper-personalised, genre-driven content

Local pioneer in MENA streaming: 4.4 m SVOD subscribers (Q4 2024), plus ~17.8 m AVOD MAUs. Leads with **vertical mobile-first original series, FAST channels, and Ramadan-first releases optimized for vertical and short-form viewing.**

“Takki” (Saudi Arabia): One of the earliest examples of a youth-focused, culturally rooted drama series produced for **mobile-first platforms** like YouTube and later Netflix. Some seasons and spin-offs adapted to vertical storytelling..



Netflix exec on the 5-year partnership with Saudi animation studio Myrkott

Myrkott Animation Studio, based in Riyadh, produces Arabic-language animations like Masameer and secured a multi-year distribution deal with Netflix, highlighting the rise of local studios delivering regionally relevant animation



Latest Shorts from The Adventures of Mansour



A Surprise on The Way Down | The Adventures of ...
977 views



3.7 m paid users in MENA as of Dec 2024, now the region's second-largest video streaming platform ahead of Netflix. Favored by Gen Z & Millennials for **ambient, on-the-move content from Shorts to reels.**

Trend 4

"Game on ... Anytime, Anywhere, Anyone"

Gaming Apps See Cross-Demographic Appeal

Gaming has evolved from a youth-dominated hobby into a mainstream, multi-generational entertainment ecosystem

Gen Alpha are addicted to hyper-casual games like Subway Surfers or Roblox. Gen Z & Millennials are immersed in Call of Duty Mobile, PUBG, Free Fire, Clash Royale. Gen X & Boomers are engaging with puzzle, card, word, and strategy games like Candy Crush, Ludo King, or Carrom Pool



Roblox – supports creative, lightweight play and creative gaming on the go

Call of Duty: Mobile, PUBG Mobile, Clash Royale – frequently cited as go-to competitive and strategy-play titles for Gen Z/Millennials in the region

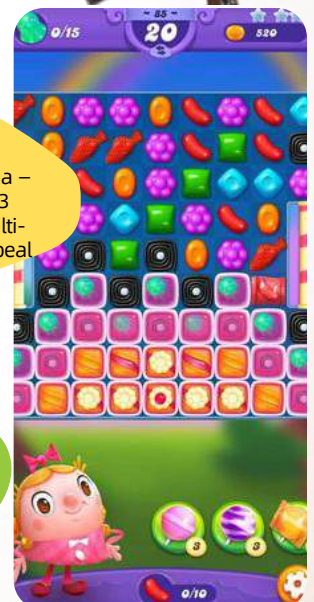


Free Fire (Garena) – widely popular across MENA with well over 100 million daily active users and a strong esports footprint



Ludo King – hugely popular in Saudi, Egypt, and surrounding markets; enjoyed by older players and social groups, with support for multiplayer on a single device

Candy Crush Saga – classic match-3 favorite with multi-generational appeal



Trend 5

“Sweat, Breathe, Repeat”

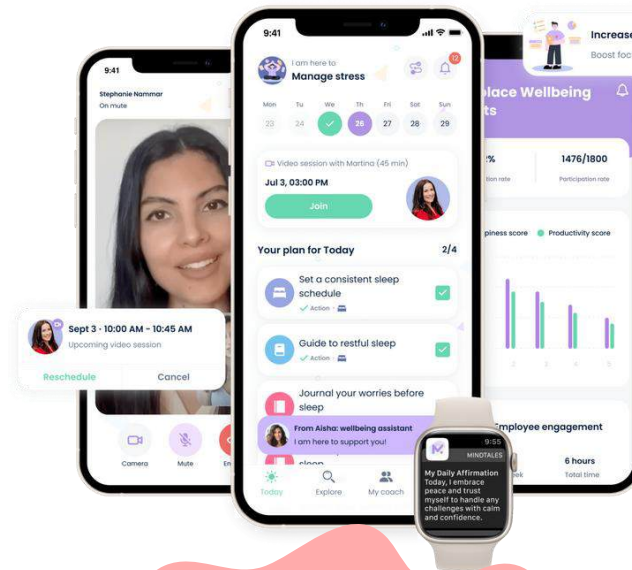
Rise in Wellness, Fitness & Mental Health Apps

The trend shows **a cultural shift towards self-care and digital well-being**, driven by a tech-savvy, health-conscious population. Gen Z and Millennials use apps for body goals, stress management, and fitness tracking.

Gen X women focus on hormonal health, yoga, and mental wellness, while health-conscious men increasingly use **gym companion apps, diet plans, and mindfulness tools**.



Labayh (KSA) provides culturally tailored counselling for Arabic speakers with anonymous consultations via app.



MindTales (UAE-based): One of MENA's leading platforms for online counseling and coaching, offering personalized programs for sleep, stress, body image, self-esteem, and relationships

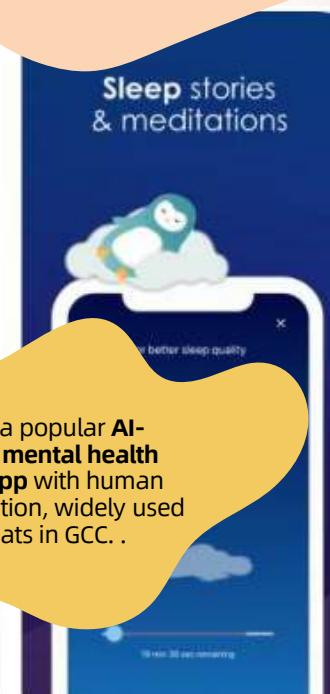
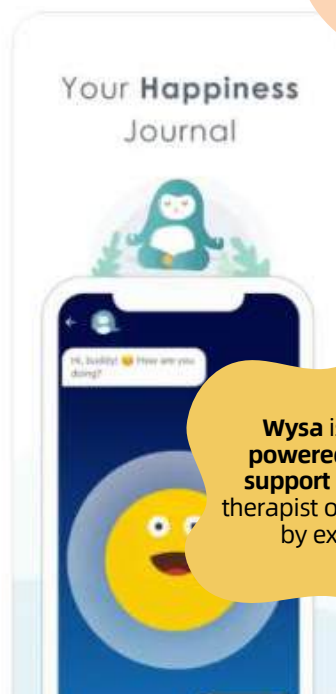


HealthifyMe (Popular in UAE / KSA): A comprehensive health & nutrition app featuring an AI nutritionist "Ria", calorie tracker tailored to regional foods, customizable workout regimes, and optional coaching



Generation Start-up: Tuhoon mental wellness app aims to be culturally relevant in Gulf

Company offers tools for self-help in Khaleeji and plans to open counselling clinics in Dubai and Riyadh



Wysa is a popular **AI-powered mental health support app** with human therapist option, widely used by expats in GCC. .

Trend 6

“Speak to me & in my language” Multilingual & Personalized Experiences

The trend in mobile apps in the Middle East emphasizes **user-centric design** due to the region's cultural diversity and **linguistic richness**.

Users expect apps to support multiple languages and preferences, enhancing relevance and engagement. Recent advancements include **AI-driven micro-personalization** for tailored UI/UX, **localization of voice and chatbots** in native **Arabic dialects**, and emotion-aware apps that adapt based on **user mood and behavior**.

Astra Tech unveils world's first Arabic Chat GPT

Wego (Travel App, MENA): A travel/metasearch app offering seamless language switching between Arabic and English, full RTL layout support, and region-specific UI flows to suit GCC users

SPEAKS ARABIC
AND ENGLISH

CHATS
NATURALLY

SETS TIMERS &
REMINDERS

MILLION+ SONGS,
HANDS-FREE

Arabic AI Chatbots (Thinkstack, Botter, Arabot): Enterprise-grade Arabic chatbots deployed across banking, healthcare, and retail in MENA. They support native dialect recognition and RTL display, offering natural chatbot interaction in regional Arabic.

Yango's super-app features **Yasmina**, an AI assistant fluent in natural Arabic dialects and English, designed for GCC users. The voice assistant manages navigation, orders, and queries, ensuring culturally aware and context-sensitive interactions.

Trend 7

“Pay me back”

Loyalty & Rewards Programs Drive App Usage

This trend is fast accelerating, as consumers increasingly **seek value, exclusivity, and personalized perks** in exchange for their time and data. This isn't just about points → it's about building **emotional loyalty and habitual usage through digital engagement**.

Recent developments in loyalty programs include **NFT-based loyalty with digital collectibles** for exclusive access, hyper-personalized offers using AI for **dynamic rewards**, and **shared loyalty points** across various sectors like fintech, mobility, retail, and hospitality.

EcoRewards Saudi

A recycling-focused loyalty app where users earn points by depositing bottles and cans in connected RVMs. Points can be redeemed at partner retailers, combining sustainability with digital engagement.

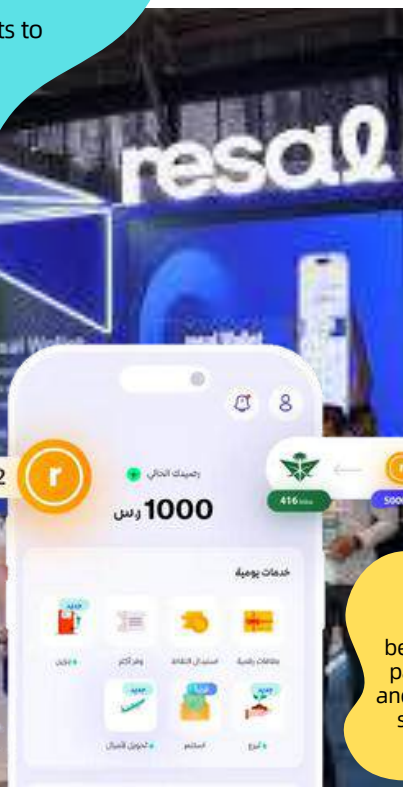
EXCHANGE

received bonuses for discounts from your favorite brands



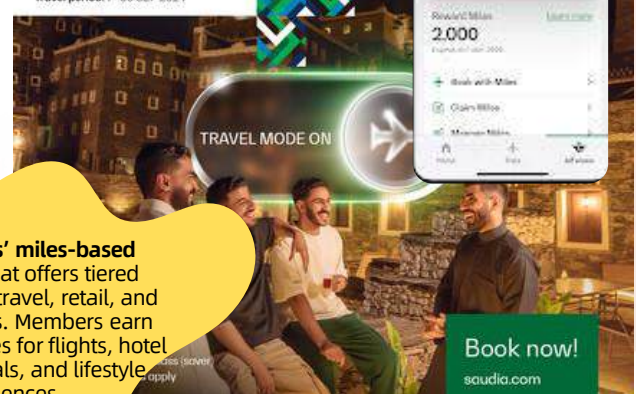
Resal Wallet

A Saudi-based digital loyalty solution offering prepaid and digital cards. Enables consumers and merchants to earn and redeem loyalty points seamlessly across loyalty ecosystems.



Nahdi's Nuhdeek loyalty app rewards customers per SAR spent on prescriptions and over-the-counter items. Includes features for prescription upload, pharmacy locator, and targeted health offers.

Saudi Arabia
with **20% off**
on domestic flights
Promo code: SV20
Sales period: 26 - 27 AUG 2024
Travel period: 1 - 30 SEP 2024



Saudi Airlines' miles-based loyalty app that offers tiered benefits across travel, retail, and partner services. Members earn and redeem miles for flights, hotel stays, car rentals, and lifestyle experiences.

Book now!

saudia.com

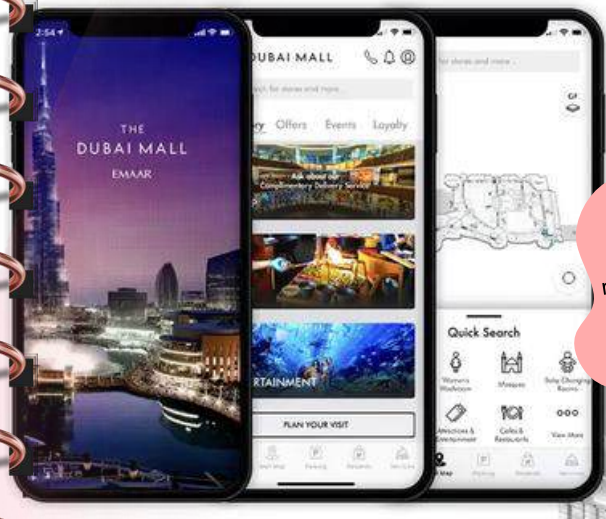
Trend 8

"Be where I am"

Location-Based Services Are Popular

This trend reflects a growing demand for **real-time, hyper-relevant,** and **convenience-focused experiences** tailored to where users are physically located. These services are redefining how consumers shop, travel, dine, and explore, with personalization and immediacy at the core.

Recent developments include **Augmented Reality Navigation** for malls, museums, and heritage sites; **apps that suggest products based on location and weather**, like recommending a nearby smoothie to cool off; and Proximity-Based Social Networking to find nearby events, people, or communities.



Dubai Mall App (UAE):
 Features indoor AR navigation, allowing users to point their phone and instantly access interactive maps of the mall's layout.



My Jiran app: A social location-based app that helps users discover nearby businesses, ATMs, restaurants, and services with user reviews and maps. Utilizes geolocation for real-time suggestions and bookmarked spots.



ARway.ai

ARway.ai, The Augmented Reality Experience Platform, Signs Multiple New Navigation Deals With Global Accounts IOT Trackers in Saudi Arabia and Walkk Software Development

ARway.ai is deployed in malls, libraries, and museums across Saudi Arabia, Oman, and UAE overlaying location-accurate AR arrows and info markers in real time via a no-code platform



Trend 9

“Zero Chill for bad experience”

Low Tolerance for Poor UX

This trend signals a clear shift in consumer expectations. With **digital maturity increasing & abundance of choice**, users now expect apps to be **fast, frictionless, and intuitively designed**—or they uninstall them. As digital adoption deepens in the region, **UX (User Experience) is no longer a bonus; it’s a baseline expectation**.

Key consumer expectations include **one-hand usability for easy thumb reach and gestures**, **live support/chat integration** for immediate assistance, and **personalization that is relevant** and not overwhelming, with a **smart, localized UI**.



The KFC Middle East App has a ~4.5★ rating in the UAE and KSA, featuring a simplified order-to-pickup process, instant support, and user-friendly design. Over 50% of orders are placed through the app, enhancing the food delivery experience.



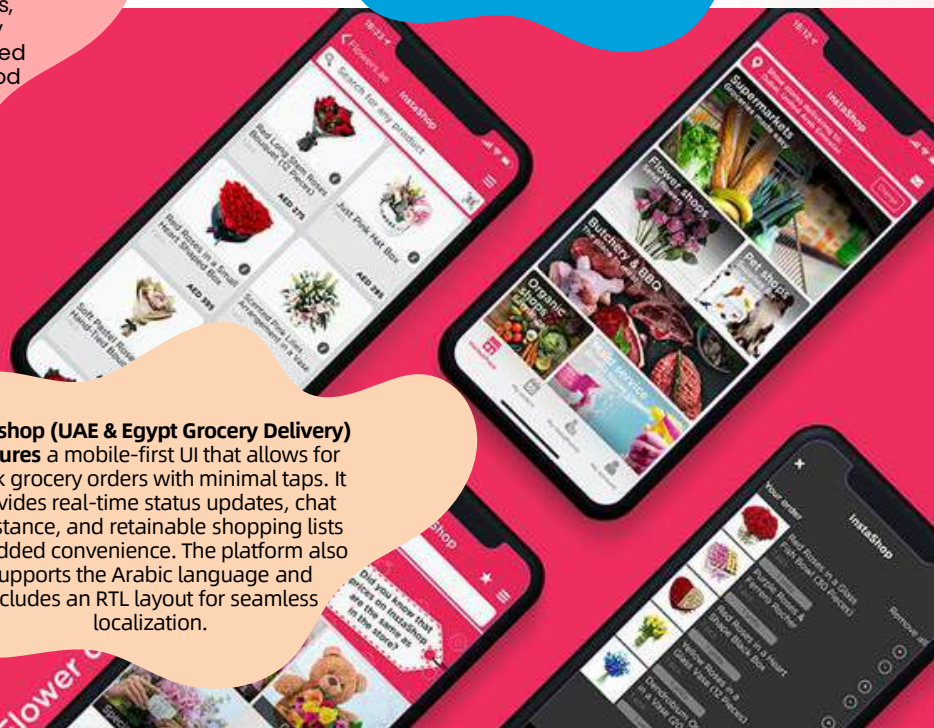
Careem App: Delivers a clean, gesture-friendly interface for ride-hailing, delivery, and wallet services. Streamlined with quick-thumb navigation with quick-access chat support built in.



انستاشوب
InstaShop

Make someone happy today

Instashop (UAE & Egypt Grocery Delivery) features a mobile-first UI that allows for quick grocery orders with minimal taps. It provides real-time status updates, chat assistance, and retainable shopping lists for added convenience. The platform also supports the Arabic language and includes an RTL layout for seamless localization.



Trend 10

“Click with Caution”

Privacy awareness with Guarded Screens

This trend reflects a growing consciousness among users about **how their personal data is collected, stored, and used**. Once overlooked, privacy is **now a critical trust signal**, particularly as the region digitizes rapidly and regulatory frameworks mature.

Trust is the new currency in mobile engagement. Privacy is not only a legal requirement, but also a brand promise. Apps that are perceived as **“watching users too closely”**—especially without opt-in clarity—risk losing engagement fast.



Telegram (Secret Chats)

While public and group chats on Telegram are not end-to-end encrypted by default, Secret Chats offer E2EE and device-only storage. Telegram remains popular in the MENA region for its relative censorship resistance and flexible privacy features.



Soroush Plus, Rubika, and Eitaa are popular across Iran and some neighboring markets. These platforms offer messaging and payment features but are state-supported and not privacy-first; users should approach with scrutiny depending on regulatory contexts.



Signal is a nonprofit, privacy-focused messaging app featuring default end-to-end encryption and minimal metadata collection. It is popular in Gulf states like the UAE and Saudi Arabia for its strong security. Privacy advocates and cybersecurity experts consider Signal the gold standard for secure mobile communication.

Mind-the-Gap

Here is a snapshot of the generational mindsets to help better connect with them...



GEN ALPHA (2012 onwards)

The Screen-First Generation



GEN Z (1997 - 2012)

The Digital Natives



GEN Y (1981 - 1996)

The Global Explorers



GEN X (1965 - 1980)

The Bridge Generation



BABY BOOMERS (1946 - 1964)

The Golden Era Fans

Mobile Usage Behavior

- First true digital natives.
- Use tablets/smartphones from an early age.
- Expect intuitive, voice-controlled, gamified experiences.
- Parents control downloads heavily.

- Mobile-first and mobile-only in many cases.
- Extremely fast adopters of new trends.
- Prefer visually dynamic, social, and interactive apps.
- Short attention spans; prefer quick, engaging experiences.

- Heavy users across multiple categories.
- Early adopters of new apps.
- Prefer seamless, mobile-first experiences.
- Prioritize personalization and convenience.

- Use apps for both work and personal life.
- Adapted well to mobile tech.
- Value functionality and practicality.

- Use mobile apps moderately.
- Prefer simple, utility-driven apps.
- Value security and ease of use.
- Less comfortable with rapid tech changes.

Popular App Types

- Educational apps
- Gaming apps (Roblox, Minecraft)
- Video streaming (YouTube Kids)
- Interactive learning platforms

- Short-form video (TikTok, Snapchat)
- Gaming apps
- Shopping apps (SHEIN, Amazon)
- Creative apps (CapCut, Canva)

- Social media (Instagram, TikTok)
- Food delivery apps
- Streaming apps (Netflix, Spotify)
- Travel & lifestyle apps

- Productivity apps (email, calendar)
- E-commerce apps
- Finance apps
- Social media (Facebook, Instagram)

- Banking apps
- Health and wellness apps
- News apps
- Communication apps (WhatsApp, Facebook Messenger)



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Explore Behavior. Discover Opportunity. Design What Matters.

4SiGHT's **signature UX research framework** for next-gen digital products.

4SiGHT UXplore™ is a deep-dive, end-to-end UX insight engine—built to decode user behavior, optimize journeys, and shape digital experiences that deliver.

It blends qualitative research depth with design precision across every phase of product development.



Our UXplore™ Journey



Understand Users

- Mental Models & Motivations
- Generative Feedback (NCPI Framework)
- Uncover Unmet Needs, Beliefs & Pain Points



Architect with Purpose

- Open/Closed Card Sorting
- Information Design & Journey Structuring
- Content Grouping Based on Real User Logic



Design That Resonates

- GUI & Aesthetic Evaluation
- Preference Testing (A/B, Multivariate)
- Wireframe Testing (Low to High Fidelity)



Benchmark & Refine

- Competitor Experience Benchmarking
- UX Gaps, Fixes & Final Recommendations



Test Before You Build Big

- Interactive Prototype Testing (Figma, Adobe XD, etc.)
- Moderated Usability Testing
- Real-Time Beta App Feedback (Live API Scenarios)

Why UXplore™?



Strategic UX from Start to Scale

Deep Behavioral Insight + Actionable Design Cues

Culturally-Tuned, Market-Specific Testing

Speaks Business, Design & Human

 **Don't Just Launch. UXplore.™**

Your best ideas deserve insight-led execution.

OUR 4SiGHT Live Suite



PANEL UAE | KSA

Our pre-recruited ahead-of-the-curve panel for quick, cost-efficient research needs, offering a window into live data.



COMMUNITIES

Designed to build an agile system to conduct research while keeping the customer at the heart of the business.
Enables clients to make consumer relevant decisions by testing on the go.



CONSUMER CONNECTS

4SiGHT's solution to curate and build a customized calendar of immersive interviews for client teams to get the pulse of the consumer.
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OUR

Research Tools

INSIGHT EXPRESS

Enables swift and efficient innovation testing, minimizing the risks linked to a comprehensive launch - allowing you explore, experiment, and fail cheap.

AASMA | CHATBOT

Facilitates interactive conversations with consumers, streamlining the process of filling consumption/usage diaries. Leading to improved efficiency and quality of data collection.

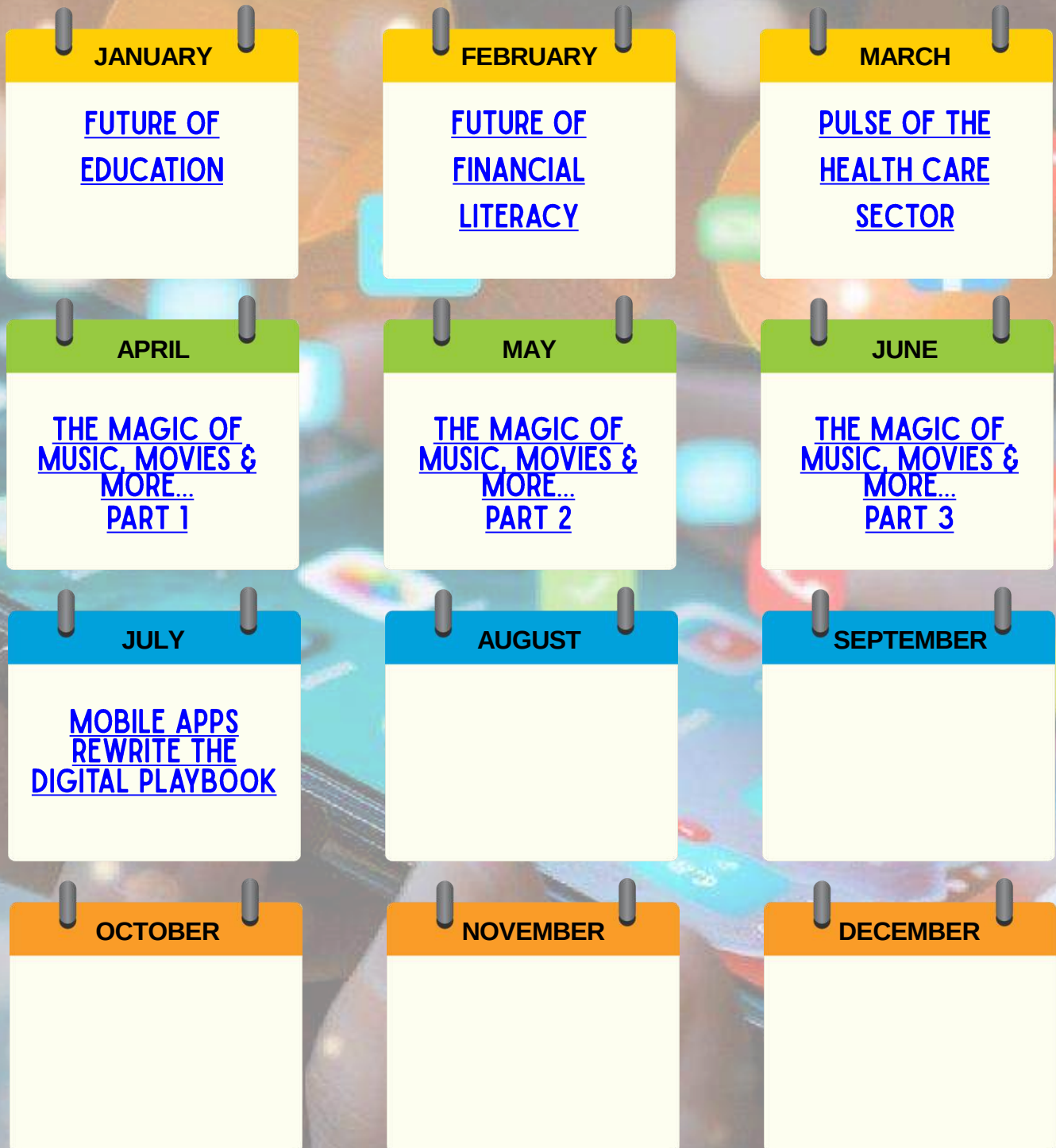
SPRINT+

Provides an innovative boost to your iterative process by making it more AGILE through co-creation workshops, giving wings to potential ideas/improvements

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OUR

Calendar 2025



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