10 Things You Need To Know About Women In MENA

GAME CHANGERS

Ipsos

Introduction:
"The 10 Things You Need to Know About Women in MENA"

Women are one of the most powerful consumer segments in the world. Not only does their influence extend across major categories, they are also the main influencers when it comes to purchase decisions relating to the household.

Their strength as a consumer segment is also evident in the MENA region. As such, in order to harness the potential that can come about from understanding this segment in MENA, Ipsos launched "She Speaks", the most comprehensive syndicated research effort studying women in the region, shedding light on their attitudes, aspirations, lifestyles and behaviors, thus providing a holistic understanding of this segment across various aspects of their lives.

Conducted between January and June of 2016, "She Speaks" covered 9 markets in MENA, and this report highlights the **10 Things You Need To Know About Women in MENA**, focusing on key insights into their lives, which in turn enable brands to better understand and engage with an extremely important segment in the region.

A Note on SHE SPEAKS: How We Did It All?

9 Countries Across MENA
(KSA, Kuwait, UAE, Iran, Morocco, Egypt, Iraq, Jordan, Lebanon)

13,500 Quantitative Interviews
30 Minute Face To Face Interviews
Females Aged 15-54 Years

92 Qualitative Focus Groups

120 Consumer Immersions

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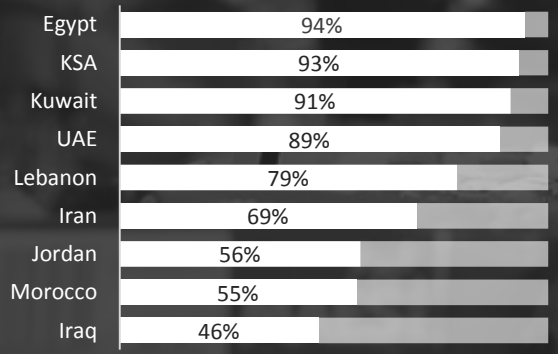
#1

In Many Markets, She Is The Designated Household Shopper

The female head of household is completely trusted when it comes to household shopping as ultimately, she is the person who best understands her family's needs, and is also the most knowledgeable when it comes to available offerings in the market.



8 in 10

are **RESPONSIBLE** for carrying out shopping for the **HOUSEHOLD**

Results based on Female Heads of Household

#2

Her Involvement In Household Purchase Decisions Extends Across Many Categories

Whether it's her influence on brand selection, or her involvement in the actual purchase of household products, the woman's role in selecting products for the household is substantial.

% Involved

PERSONAL CARE PRODUCTS	FOOD & BEVERAGE	HOUSEHOLD APPLIANCES	FURNITURE & ACCESSORIES
96%	93%	89%	88%

Results based on Female Heads of Household

#3

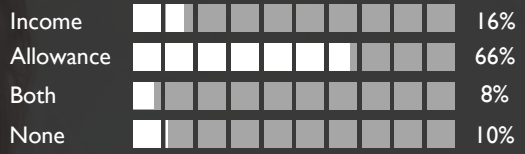
Nonetheless, She Does Not Generate Her Own Income

Despite her influence in household decisions, she remains reliant on the men in her life for financial support, be it for household related purchases, or for her own personal use.

7 in 10

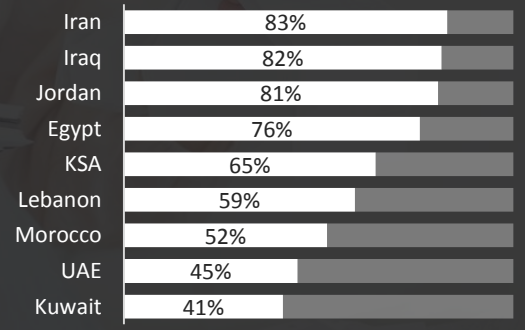
Depend on Receiving an Allowance as a Primary Source of Income

Sources of Income



Those Depending on an Allowance as a Source of Income

By Country



#4

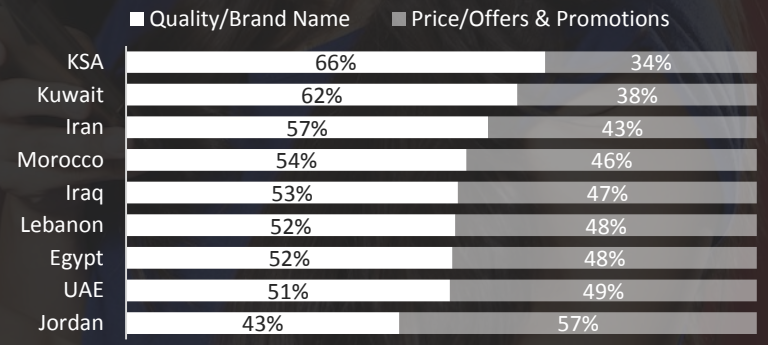
Therefore, Product Selection Is All About Value For Money

Her financial dependence often has implications on her shopping behavior. While Gulf countries remain more focused on quality and brand name when it comes to product selection, other countries are more price sensitive and thus more likely to look out for offers and promotions to minimize financial pressures.

55%
CHOOSE QUALITY OR BRAND NAME

KEY SELECTION CRITERIA

45%
CHOOSE PRICE OR OFFERS & PROMOTIONS



#5 She Is Not Always Loyal to Brands, and Is Willing to Explore

Her loyalty towards brands is not necessarily strong, with an equal split between those always sticking to their brands, and those who don't. However, she is more likely to keep an eye out for the best offers and deals that she can find, something that makes her feel accomplished as she buys good quality products for a good price. Her enticement to buy things on impulse is also significant, driven mostly by younger females who have fewer responsibilities, and are thus more likely to indulge themselves.

50%

Always Stick to The Brands They Know

Brand Loyalty

57%

Always Look For The Best Offers & Deals

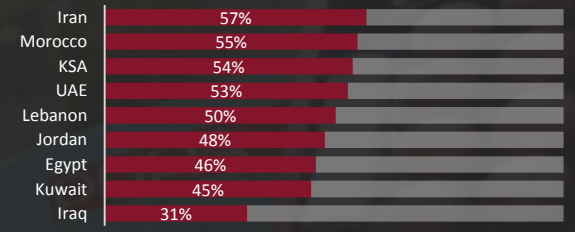
Deal Seeking

40%

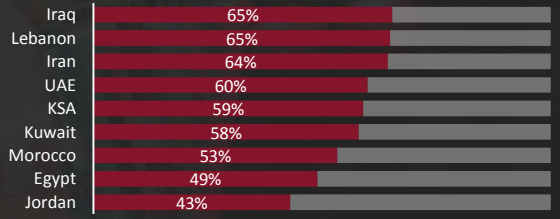
Always Buy Things They Didn't Originally Plan on Buying

Impulse Buying

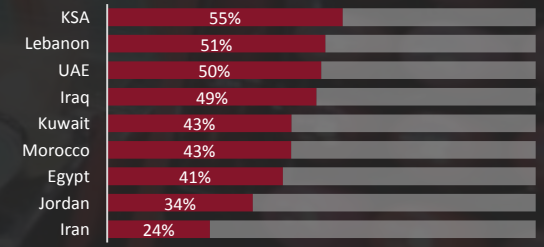
Brand Loyalty



Deal Seeking



Impulse Buying



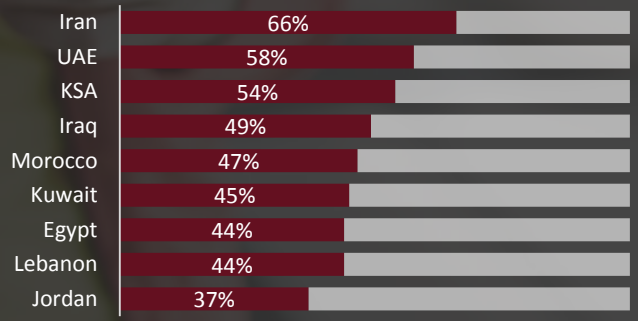
#6

She Is An Informed Shopper

Seeking information beforehand allows her to make smarter choices, whether this means understanding which products are best by comparing between them, or finding the best deals out there.

53%

Will always **LOOK** for **INFORMATION** about products **BEFORE BUYING** them



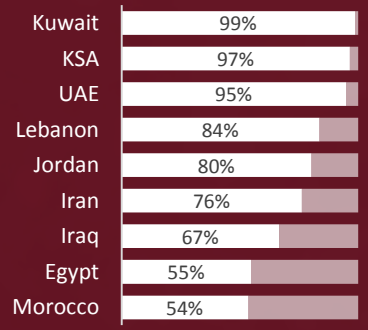
#7

She Is Connected Through a Variety Of Platforms

The internet is where she is able to express herself most freely. There, it comes as no surprise that most women in MENA are internet users, and among these, most are also social media users. Nonetheless, the Gulf region and younger generations are most connected, with Facebook, YouTube, Instagram and Snapchat being the most popular social media platforms.

69%

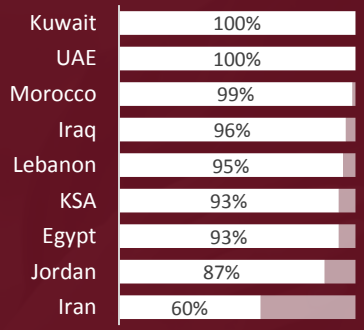
Access The Internet



86%

Use Social Media

(From Internet Users)



Top Social Media Platforms

YouTube 75%

facebook 71%

Instagram 64%

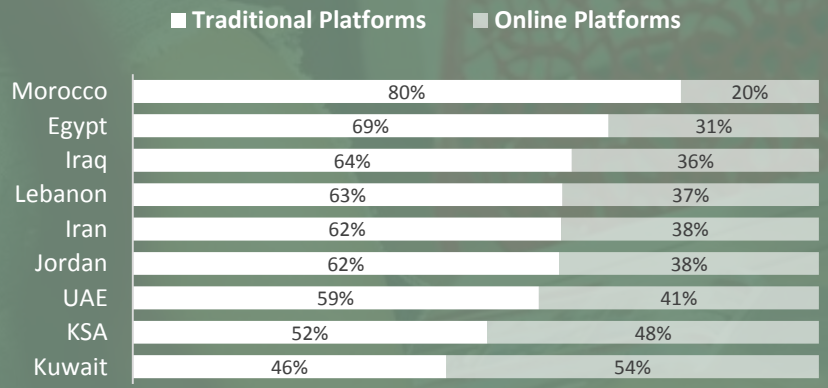
59%

#8 Her Reliance on Traditional Media for Information Remains High

Main Source of Information on Products and Brands

TRADITIONAL MEDIA 74%

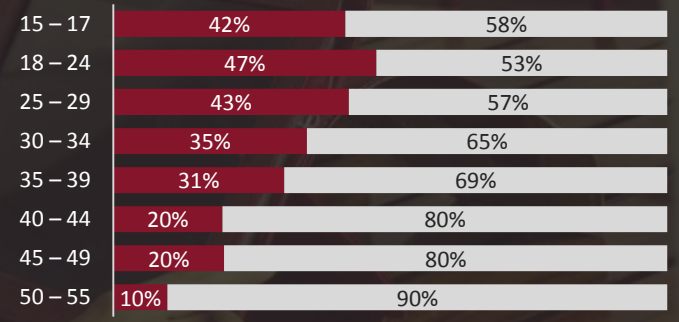
ONLINE PLATFORMS 26%



But the Scales are Tilting

While TV is currently her most important source of information on products and brands, a transition from traditional to online platforms is unfolding as far as information seeking is concerned, driven by a younger and more digitally connected female generation.

Main Source of Information
-By Age

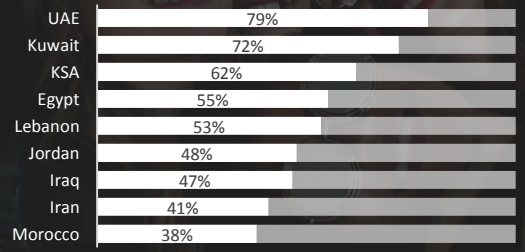


#9 She Is Increasingly Engaged & Interacting With Her Favorite Brands

Primarily through Social Media, she is highly engaged with her favorite brands, and is quite likely to advocate for or against brands based on her experiences. Women in Gulf countries are more engaged given the higher internet usage levels when compared to other countries.

49%

Have **Interacted** with Their Favorite **Brands**



Brand Interaction

- **39%** Liked a Brand on Facebook
- **33%** Recommended a Brand to Others
- **30%** Recommended Others Against a Brand
- **23%** Visited a Brand's Website

#10

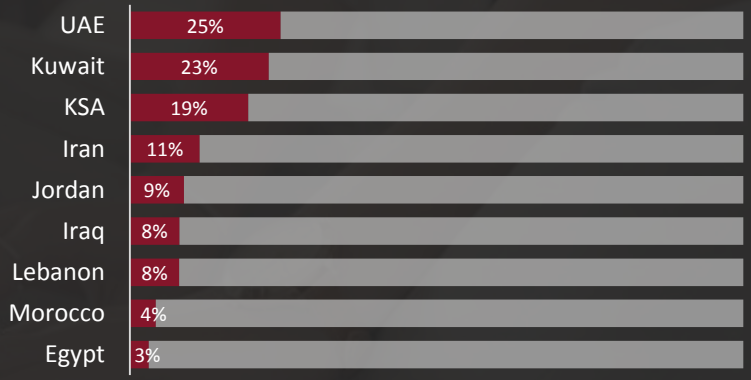
But Despite Her High Connectivity Levels, Online Shopping is Yet to Make Headway

While she relies on online sources for information, her online shopping is limited and often reserved to finding good bargains, and in some cases, finding unique or hard to find items that allow her to stand out from those around her.

14%

Ever purchased products online

In most cases, she does not have the tools through which to purchase products online. As a result, even when products are purchased online, Women prefer cash on delivery as a payment method, which is perceived to be more accessible, more convenient, and more trustworthy.



In Summary: 10 Things You Need To Know About Women In MENA

#1 In Many Markets, She Is The Designated Household Shopper

#2 Her Involvement In Household Purchase Decisions Extends Across Many Categories

#3 Nonetheless, She Does Not Generate Her Own Income

#4 Therefore, Product Selection Is All About Value For Money

#5 She Is Not Always Loyal to Brands, & Is Willing to Explore

#6 She Is An Informed Shopper

#7 She Is Connected Through a Variety Of Platforms

#8 Her Reliance On Traditional Media For Information Remains High, But Scales Are Tilting

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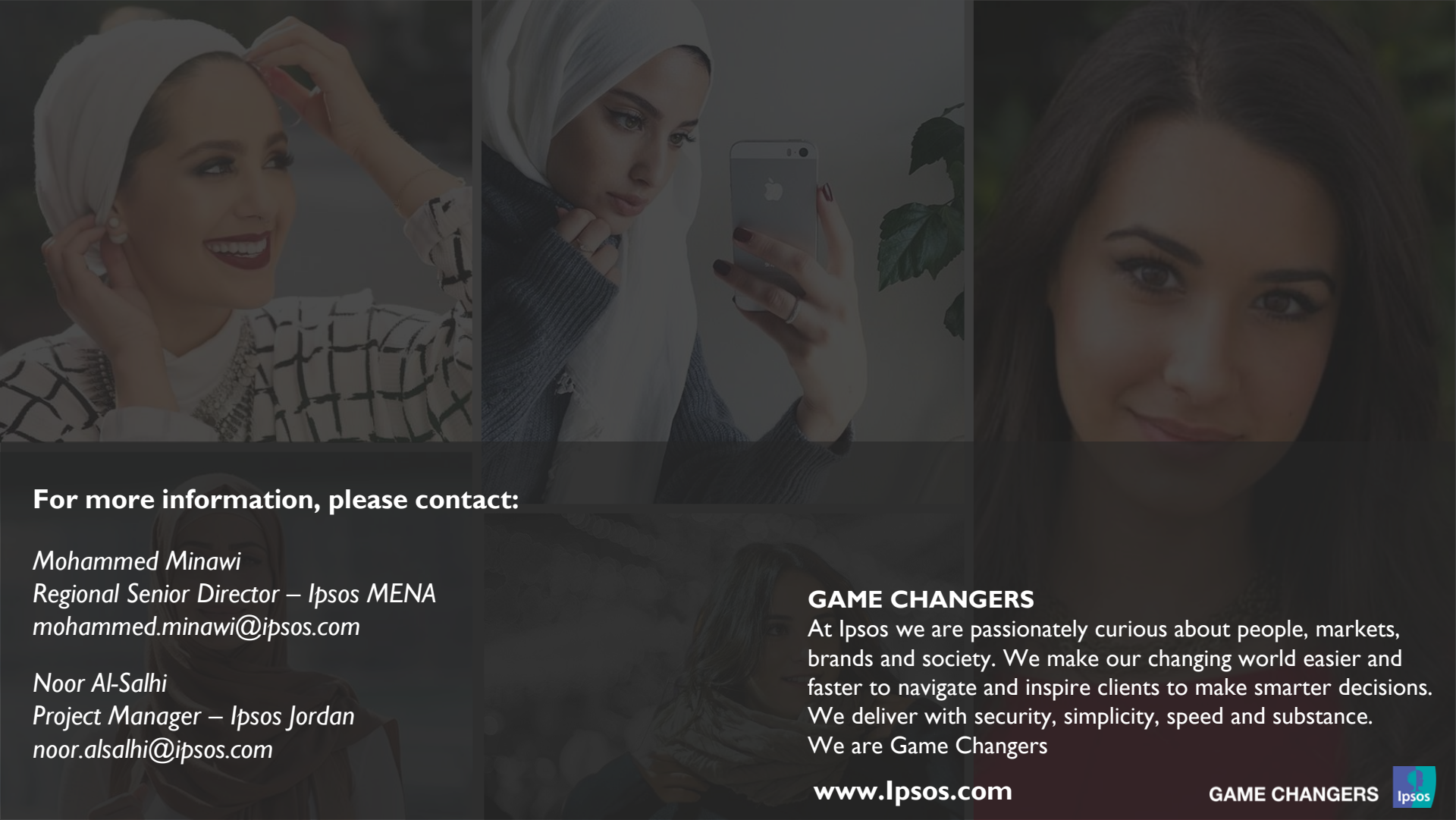

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