

Spotlight* MENA

The 2024 Ramadan Handbook

March 2024

GAME CHANGERS



Report Overview



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What Do People Love Most About Ramadan?

The most beloved aspects about the holy month of Ramadan are the spirituality and fasting



30%
Spirituality



15%
Fasting



15%
Family and social
gatherings



11%
Iftar meal



10%
Tarawih prayers



7%
Ramadan's
atmosphere



5%
Reciting the Quran



2%
Charity and good
deeds



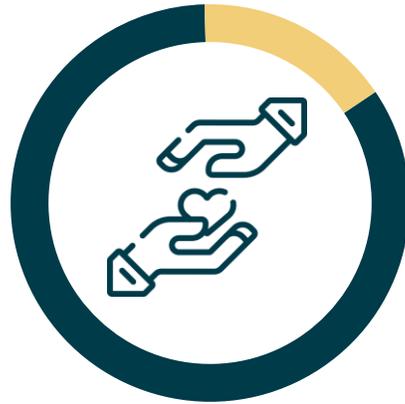
Lifestyle Changes In Ramadan

People view Ramadan as a time to focus on spiritual matters and acts of charity



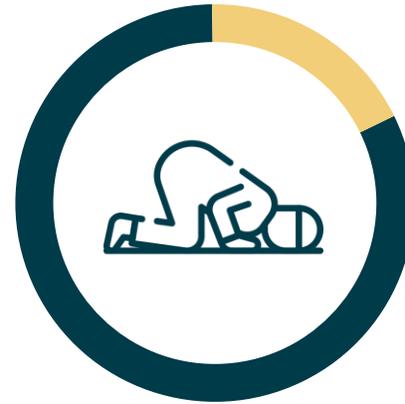
86%

Take Ramadan as a time of deep spiritual reflection and increased religious devotion



84%

Believe Ramadan is about engaging in acts of charity

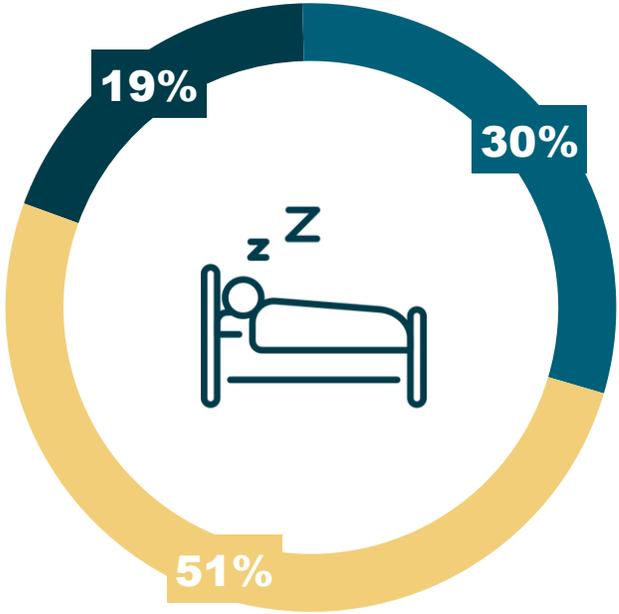


82%

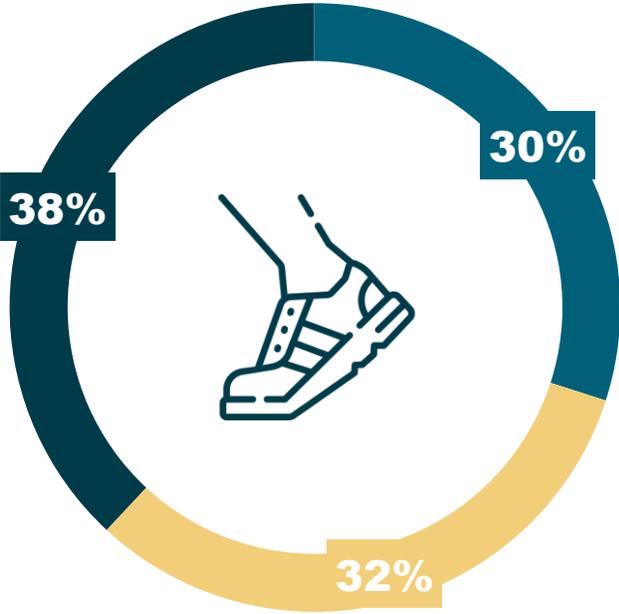
Focus more on spirituality during Ramadan



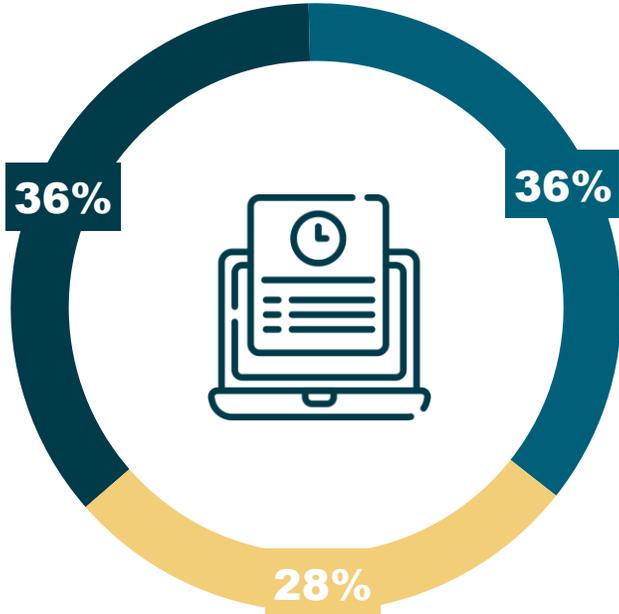
Sleep, activity and productivity vary between individuals in MENA during Ramadan



Sleep during Ramadan



Activity levels during Ramadan



Productivity levels at work during Ramadan

■ Increase ■ Stay the same ■ Decrease

Sleep, activity and productivity

– By country



Sleep during Ramadan



Activity levels during Ramadan



Productivity levels at work during Ramadan

% Increase

% Decrease

19%

51%

% Increase

% Decrease

38%

32%

% Increase

% Decrease

36%

28%

Jordan

19%

45%

26%

35%

33%

24%

Egypt

22%

53%

44%

33%

41%

34%

KSA

21%

51%

46%

25%

42%

23%

Kuwait

15%

42%

34%

27%

19%

32%

Morocco

11%

61%

39%

31%

43%

24%

UAE

23%

55%

38%

42%

35%

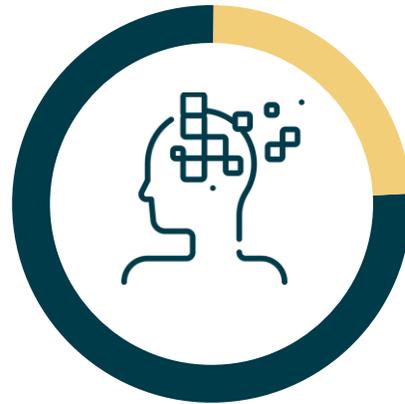
32%

Ramadan often evokes nostalgic feelings about loved ones, therefore, people prioritize family during the holy month



90%

Spend more time with family than with friends during Ramadan



76%

Feel that Ramadan evokes a sense of nostalgia, taking them back to cherished family times

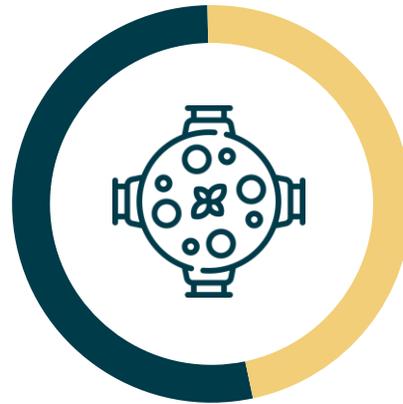


Many feel that family gatherings have changed and 1 in 2 sense that the Ramadan spirit isn't as strong as it was in the past



57%

Believe the spirit of Ramadan doesn't feel as strong as it did in the past

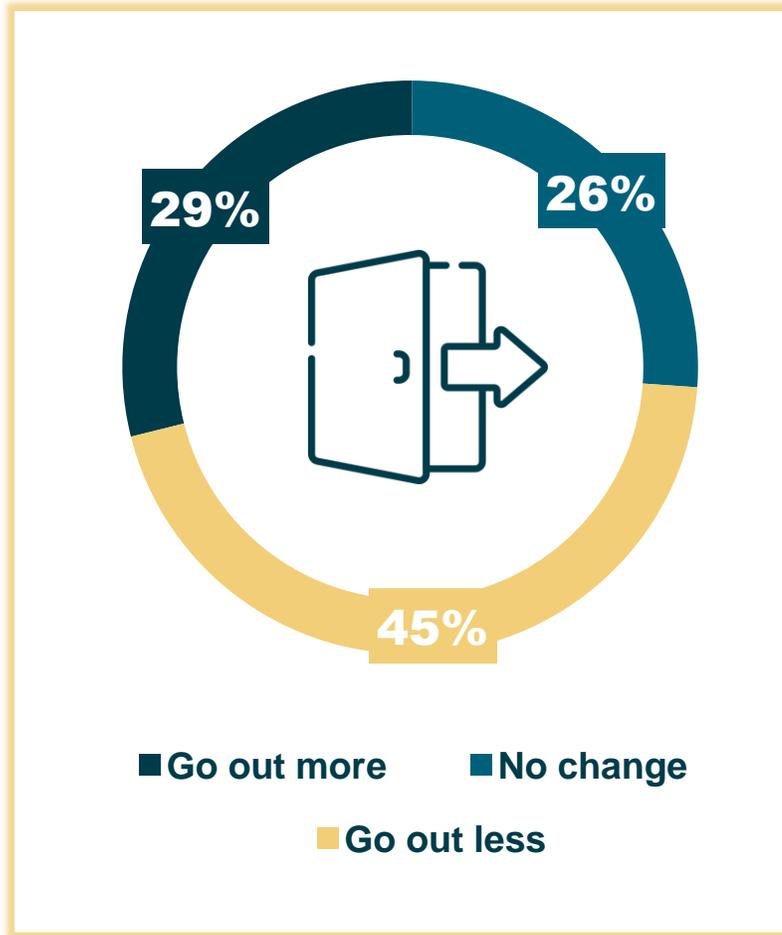


53%

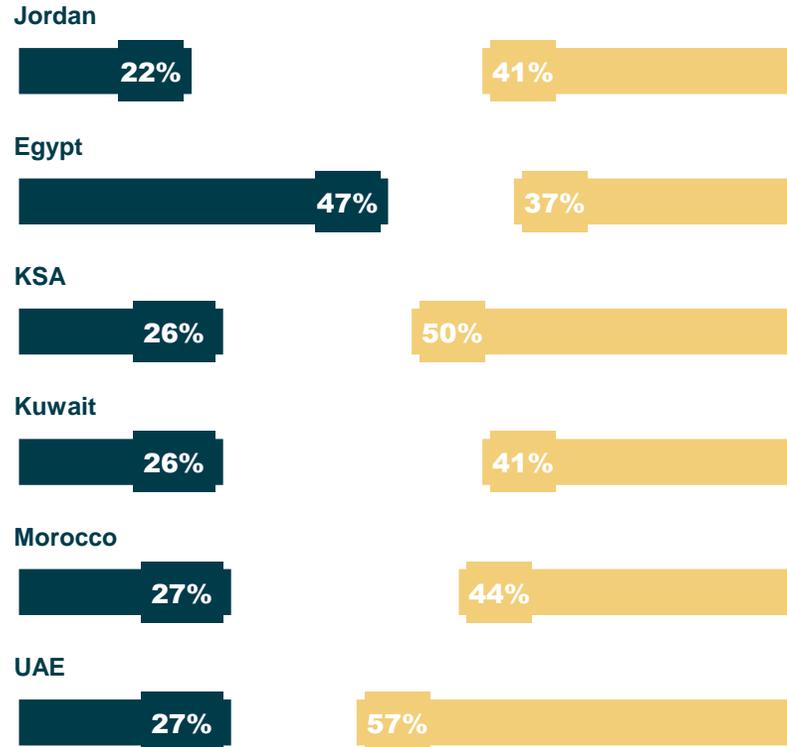
Feel that nowadays, fewer people gather around the iftar table as compared to the past



As a result, going-out habits are impacted, with around 1 in 2 individuals opting to stay in more



By Country



As people spend more time indoors, many decorate their homes and pay attention to festivities



67%

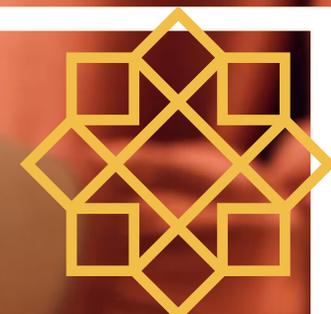
Decorate their house during Ramadan



60%

Believe that decorating and creating a festive atmosphere at home is an essential part of Ramadan customs





Eating Habits In Ramadan

People consider Ramadan as a period to be healthy and reset their bodies



75%

Consider Ramadan an opportunity to reset their body



75%

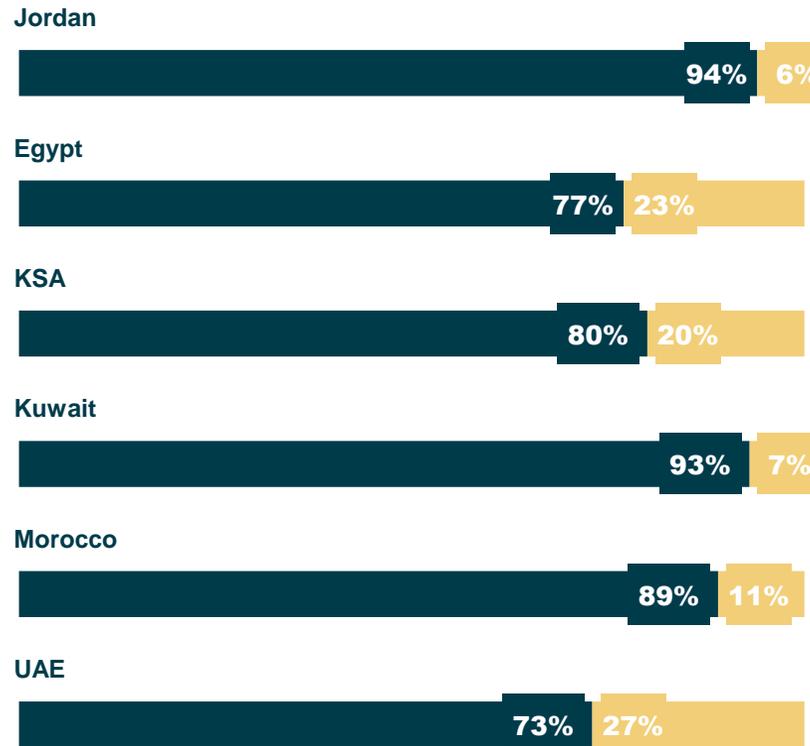
Consider Ramadan as period of physical discipline and health consciousness



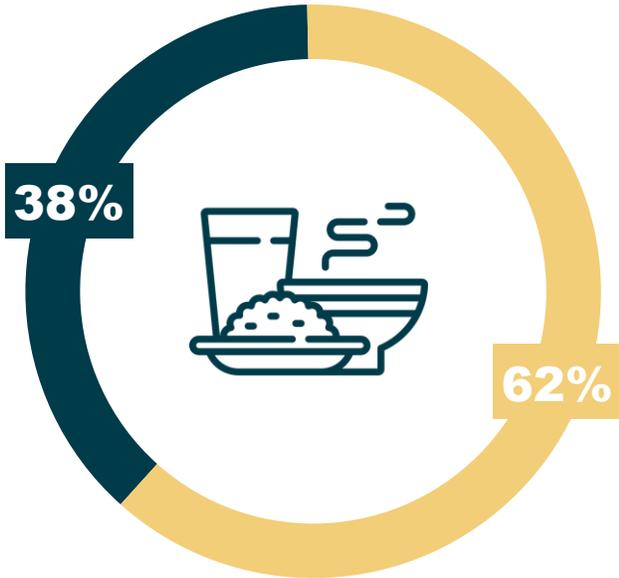
The majority tend to favor home-cooked meals over eating out during Ramadan



By Country



People usually break their fast with dates, followed by appetizers, and a variety of main dishes



- Usually eat one main dish during Iftar
- Usually eat a variety of main dishes during Iftar



86%

Always break their fast with dates



74%

Have appetizers everyday at Iftar

The majority observe Suhoor and have snacks after Iftar



84%

Have Suhoor
on most nights

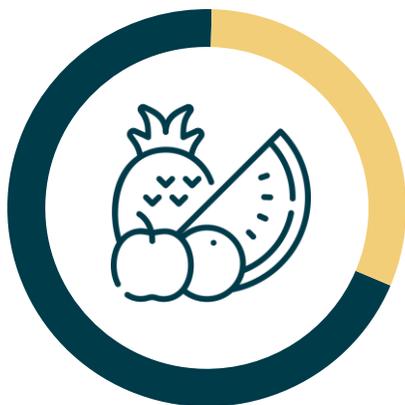


84%

Usually have
snacks after Iftar



7 in 10 people eat healthy snacks after Iftar and half indulge in unhealthy snacks



69%

Have healthy snacks after Iftar



46%

Have unhealthy snacks after Iftar



Snacking behaviour during Ramadan

– By country



Usually have snacks after Iftar

84%



Have healthy snacks after Iftar

69%

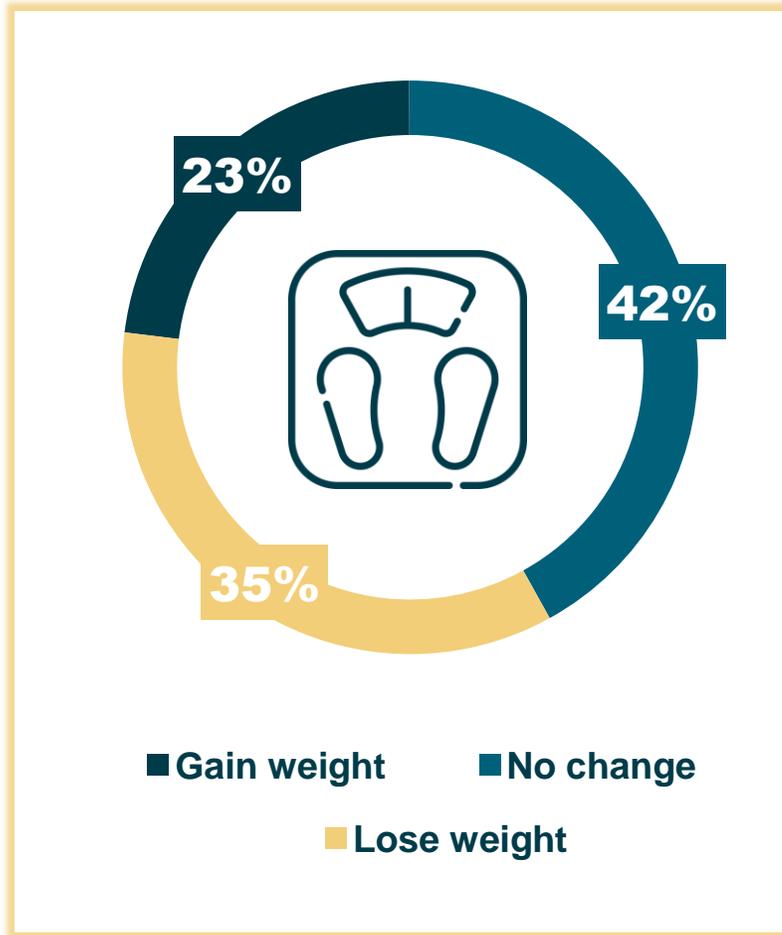


Have unhealthy snacks after Iftar

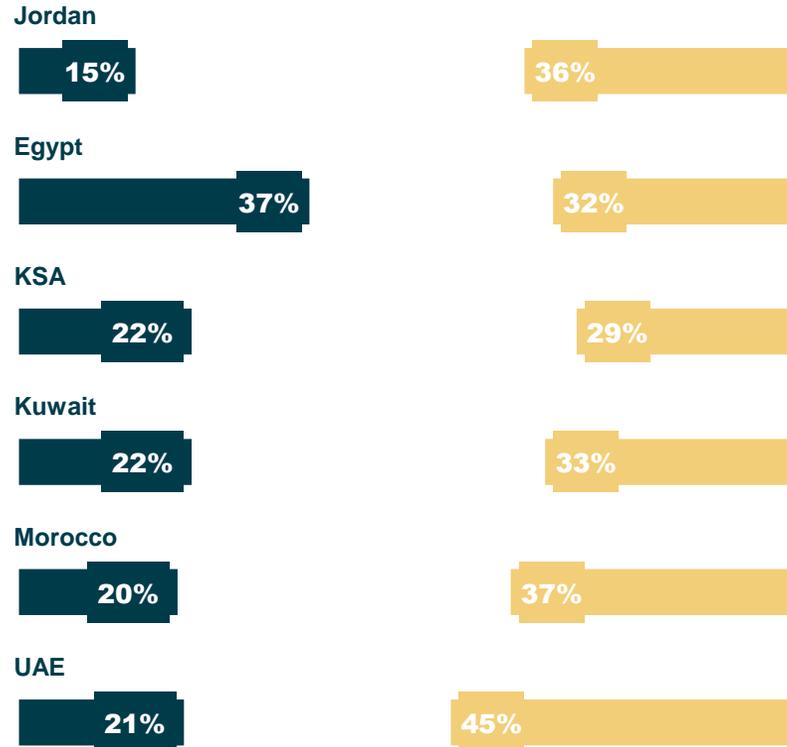
46%

	Usually have snacks after Iftar	Have healthy snacks after Iftar	Have unhealthy snacks after Iftar
Jordan	76%	62%	40%
Egypt	89%	60%	48%
KSA	87%	76%	53%
Kuwait	82%	63%	50%
Morocco	82%	75%	38%
UAE	89%	78%	45%

Weight management during Ramadan varies between countries



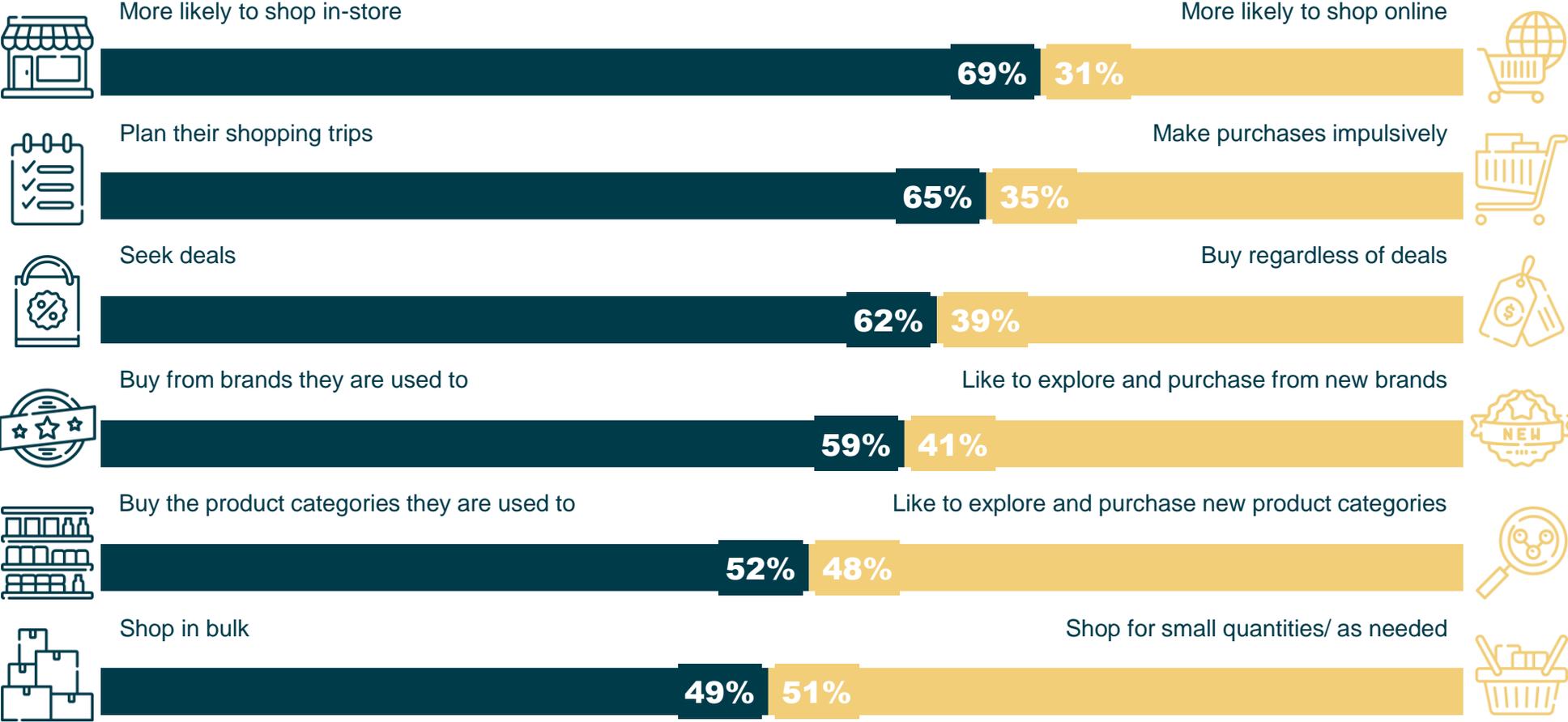
By Country





Shopping Habits In Ramadan

Shoppers in Ramadan tend to be more meticulous; mainly planning their purchases, shopping in-store, deal hunting and sticking to familiar brands



Types of shoppers during Ramadan

– By country



More likely to shop in-store

69%



More likely to shop online

31%



Plan their shopping trips

65%



Make purchases impulsively

35%



Seek deals

62%



Buy regardless of deals

39%



Buy from brands they are used to

59%



Explore new brands

41%



Buy product categories they are used to

52%



Explore new product categories

48%



Shop in bulk

49%



Shop for small quantities

51%

	More likely to shop in-store	More likely to shop online	Plan their shopping trips	Make purchases impulsively	Seek deals	Buy regardless of deals	Buy from brands they are used to	Explore new brands	Buy product categories they are used to	Explore new product categories	Shop in bulk	Shop for small quantities
Jordan	80%	20%	69%	31%	61%	39%	66%	34%	60%	40%	34%	66%
Egypt	76%	24%	64%	36%	64%	36%	63%	37%	59%	41%	58%	42%
KSA	57%	43%	69%	31%	69%	31%	62%	38%	50%	50%	59%	41%
Kuwait	73%	27%	46%	54%	52%	48%	58%	42%	51%	49%	38%	62%
Morocco	75%	25%	66%	34%	52%	48%	55%	45%	46%	54%	44%	56%
UAE	53%	47%	75%	25%	71%	29%	48%	52%	48%	52%	61%	39%

1 in 2 often await Ramadan's offers and 2 in 5 even postpone their big purchases to benefit from the discounts



50%

Look forward to Ramadan's special offers and promotions each year



40%

Delay big-ticket purchases until Ramadan to benefit from its special offers



Snacking behaviour during Ramadan

– By country



Look forward to Ramadan's special offers and promotions each year

50%

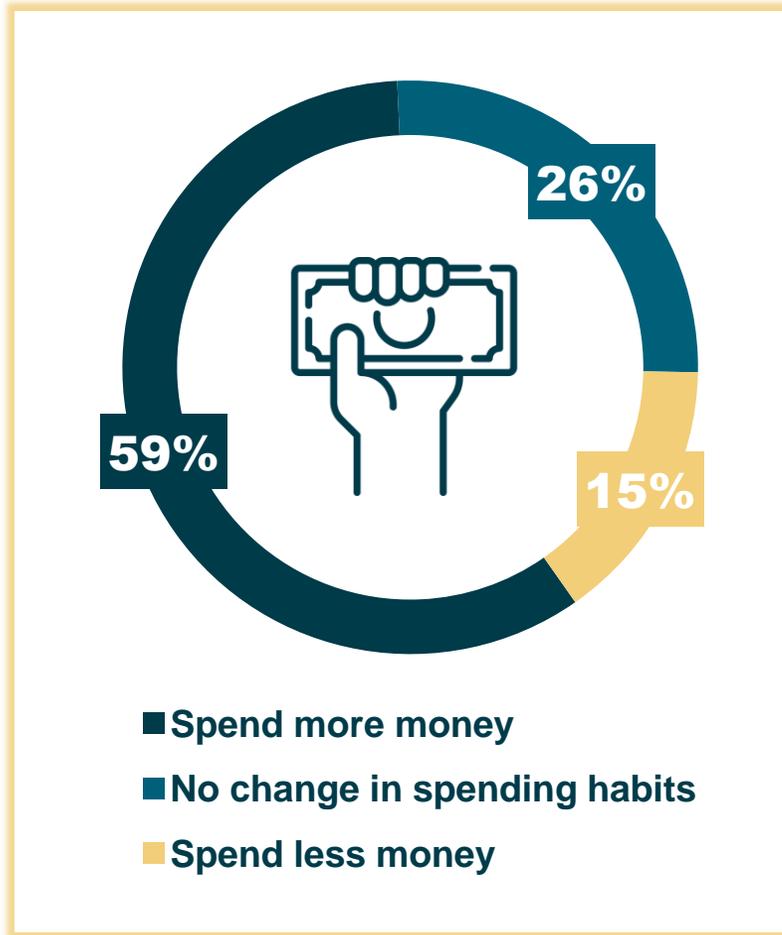


Delay big-ticket purchases until Ramadan to benefit from its special offers

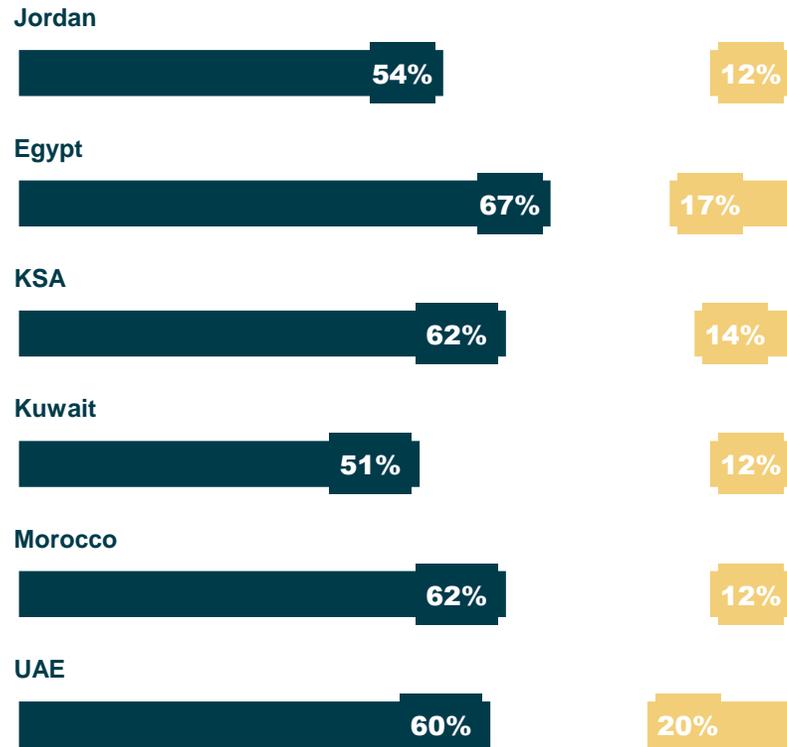
40%

Jordan	30%	30%
Egypt	71%	52%
KSA	61%	46%
Kuwait	47%	35%
Morocco	31%	29%
UAE	61%	48%

6 in 10 spend more money during the holy month



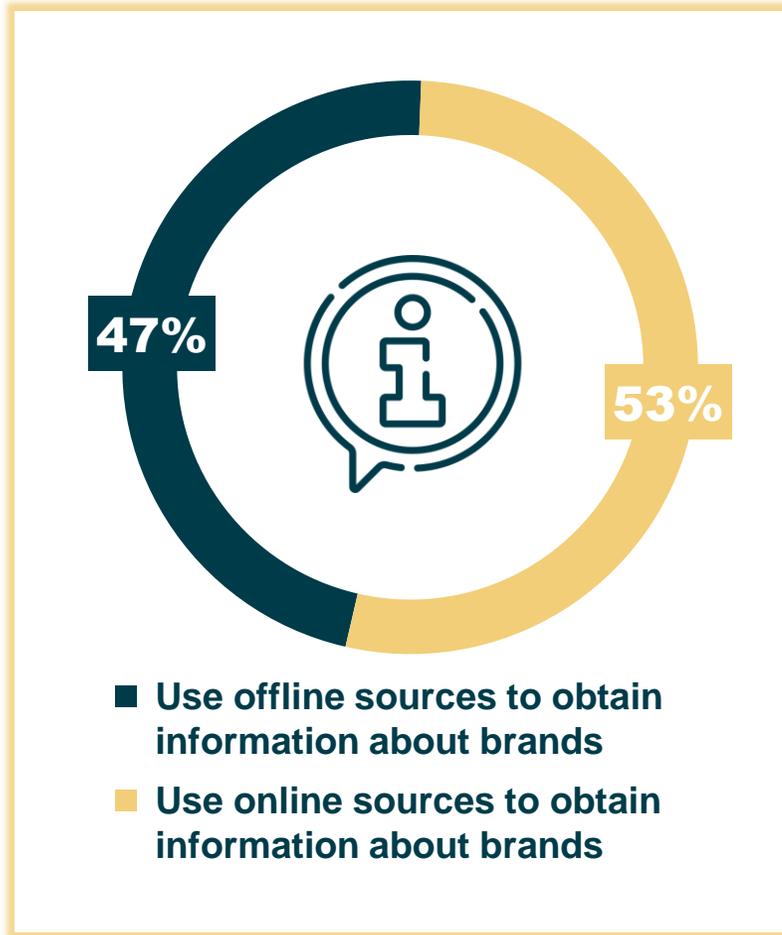
By Country



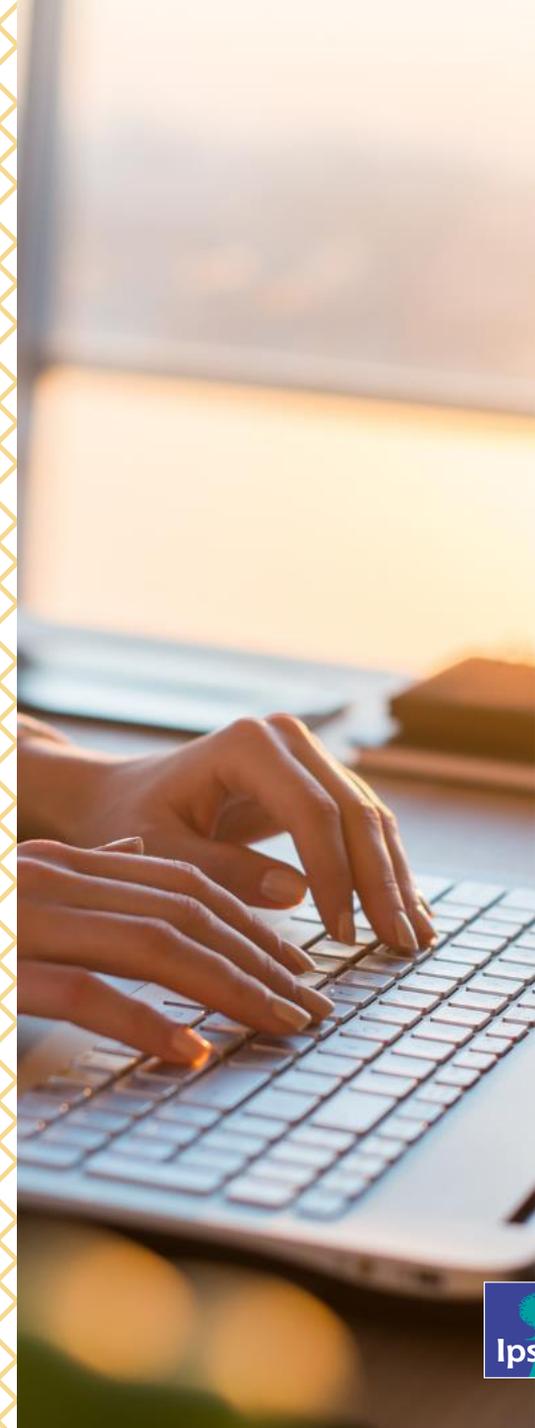
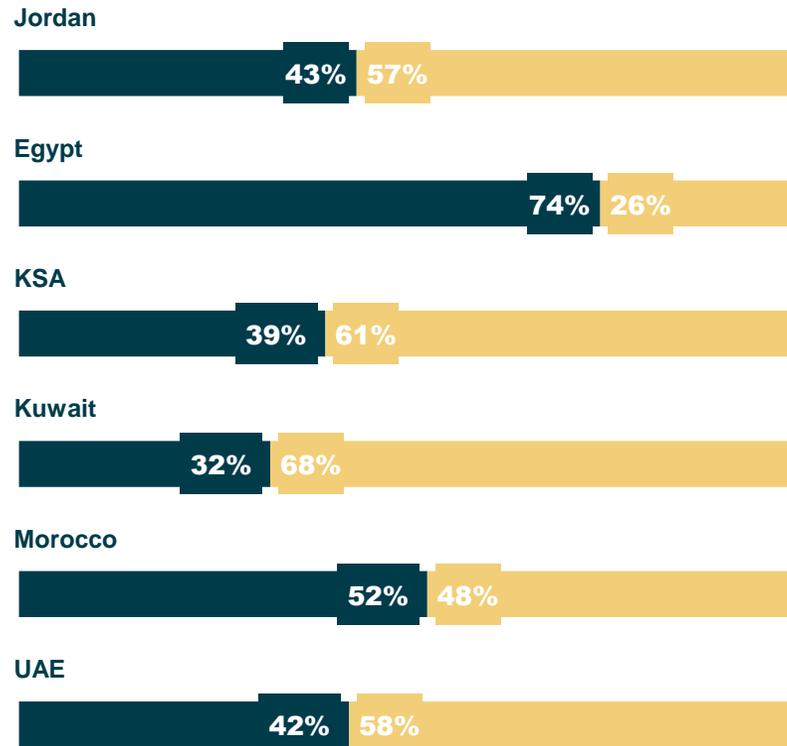


Brand Interaction And Advertising

Reliance on sources to get brand information is almost split in half between online and offline sources



By Country



Social media platforms take the lead when it comes to sources used to obtain information about brands during Ramadan



28%
Social media
platforms



17%
TV



12%
Word of mouth



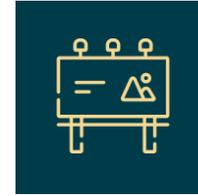
12%
Directly at the
physical store/
outlet



10%
Online
advertisements



5%
Company/brand
websites



4%
Billboards and outdoor
advertisements



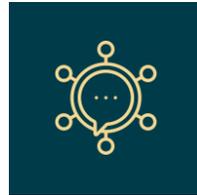
3%
Online reviews
and ratings



3%
E-commerce
platforms



2%
Influencers



1%
Blogs/Forums/
Online communities



1%
Newspapers



1%
Email newsletters
subscriptions



1%
Radio



Main sources used to obtain information about brands

Top sources – By country




Social media
platforms



TV


Word of mouth


Directly at the
physical store/ outlet


Online
advertisements


Company/brand
websites

28%

17%

12%

12%

10%

5%

	28%	17%	12%	12%	10%	5%
Jordan	32%	8%	13%	15%	10%	5%
Egypt	13%	49%	14%	8%	5%	3%
KSA	32%	10%	10%	15%	8%	8%
Kuwait	50%	9%	12%	5%	13%	1%
Morocco	17%	18%	9%	17%	16%	4%
UAE	24%	10%	12%	12%	9%	6%

People feel an ad overload in Ramadan leading to the perception that it has become more commercialized over the years



76%

Believe there are too many ads during Ramadan



62%

Feel that Ramadan has become more commercialized over the years

Half admit to being influenced by Ramadan ads to make purchases, and a similar number mention the memorability of advertising brands



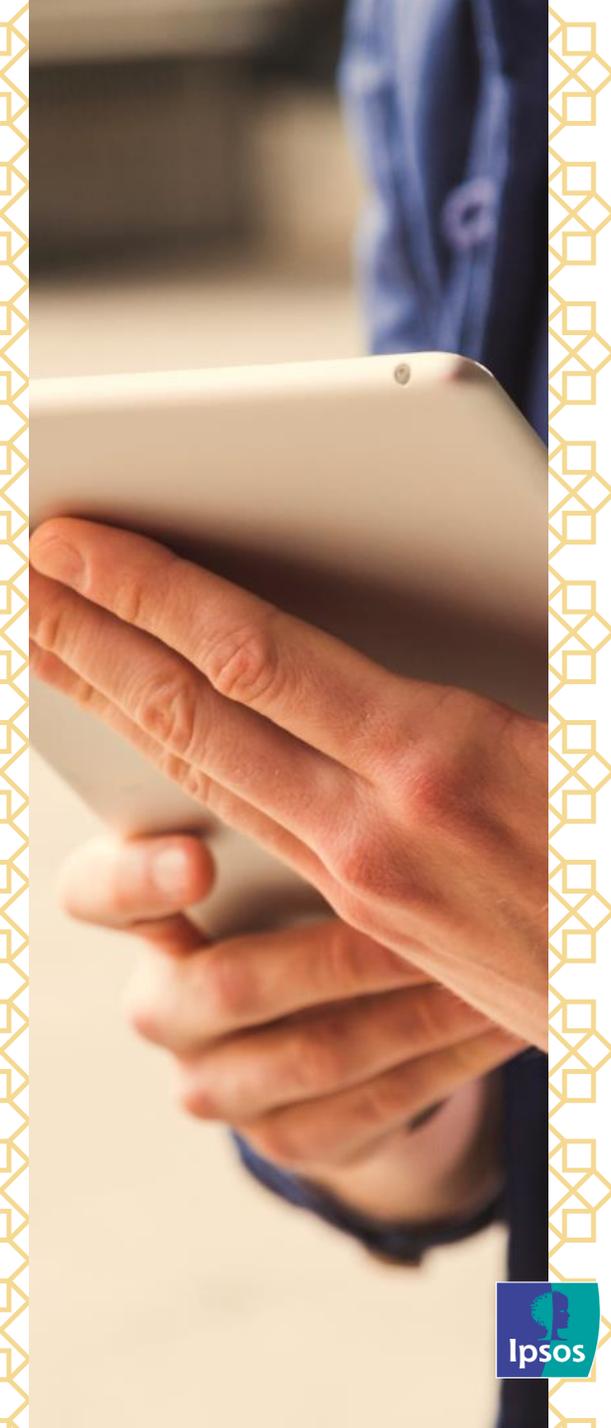
49%

Have previously purchased a product based on an ad they saw during Ramadan



46%

Are more likely to remember brands that advertise during Ramadan



Attitudes towards ads and commercialization during Ramadan

– By country



Believe there are too many ads during Ramadan

76%



Feel that Ramadan has become more commercialized over the years

62%



Have previously purchased a product based on an ad they saw during Ramadan

49%



Are more likely to remember brands that advertise during Ramadan

46%

	76%	62%	49%	46%
Jordan	74%	62%	37%	28%
Egypt	82%	68%	64%	67%
KSA	79%	55%	55%	50%
Kuwait	84%	72%	47%	46%
Morocco	68%	55%	39%	29%
UAE	67%	59%	54%	53%



The Ramadan Personas

The diverse Ramadan personas - each with unique attitudes and behaviours during the holy month



26%

The Content Explorer



24%

The Passionate Shopper



19%

The Social Connector



18%

The Festive Spirit



15%

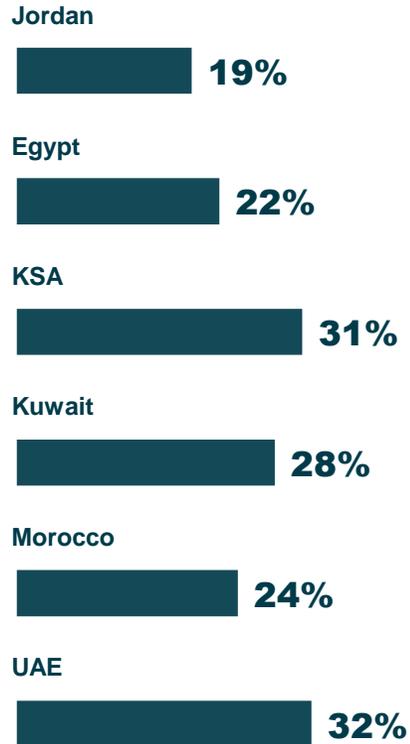
The Self Nurturer

Who is the Content Explorer? (26%)

A digital enthusiast who engages deeply with Ramadan-related programs and content on social media



By Country



View Ramadan as a season for exploring and watching series and catching up on Ramadan-themed programs

73%



View Ramadan as a time for digital connection and engaging with Ramadan-related social media content

63%



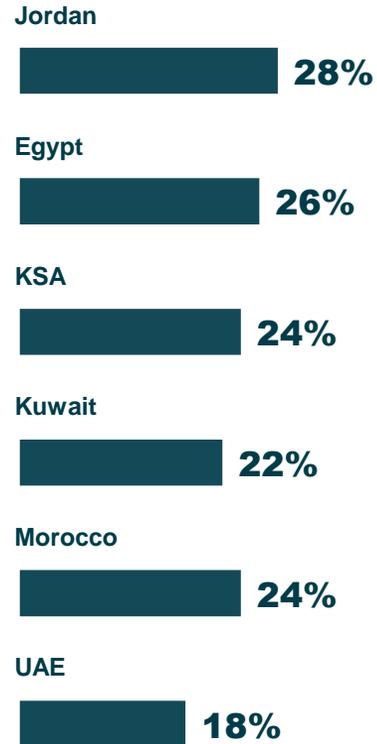
Jordan	54%	29%
Egypt	94%	58%
KSA	74%	76%
Kuwait	81%	76%
Morocco	54%	64%
UAE	83%	76%

Who is the Passionate Shopper? (24%)

A shopping lover who indulges in the busy markets and attractive deals during Ramadan



By Country



Perceive Ramadan as a season of shopping, with attractive deals and bustling markets

69%



Take Ramadan as a time to indulge in shopping, whether for Eid gifts or personal treats

65%



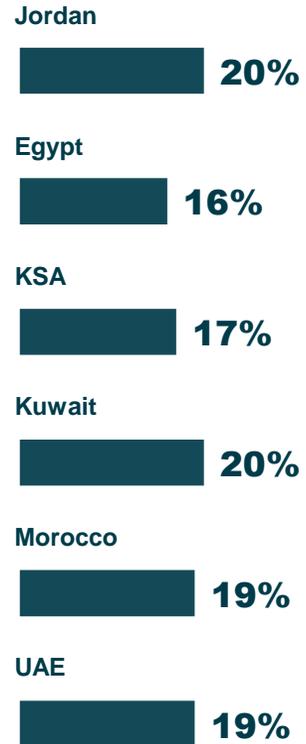
Jordan	73%	52%
Egypt	89%	88%
KSA	79%	74%
Kuwait	83%	41%
Morocco	44%	53%
UAE	46%	81%

Who is the Social Connector? (19%)

A social butterfly cherishing shared experiences and connections during Ramadan with family, friends and the community



By Country



Believe Ramadan a time to connect with many friends and social groups

84%



Believe Ramadan is a time of togetherness and shared experiences with loved ones

83%



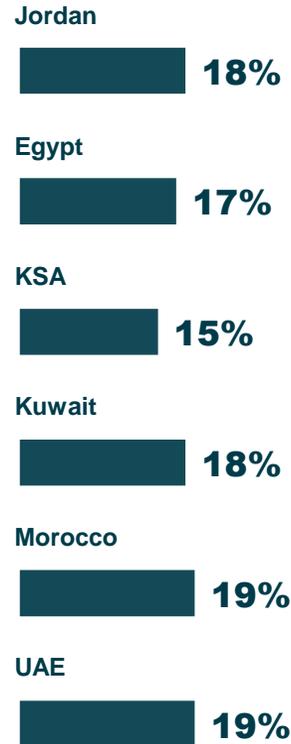
Jordan	77%	86%
Egypt	96%	90%
KSA	81%	84%
Kuwait	94%	96%
Morocco	72%	66%
UAE	82%	76%

Who is the Festive Spirit? (18%)

A person who creates a festive atmosphere around them and enjoys the traditions of Ramadan



By Country



Believe that decorating and creating a festive atmosphere at home is an essential part of Ramadan customs

86%



Believe that Ramadan embodies the spirit of festivity, with its community Iftar/Suhoor meals and shared joy

81%



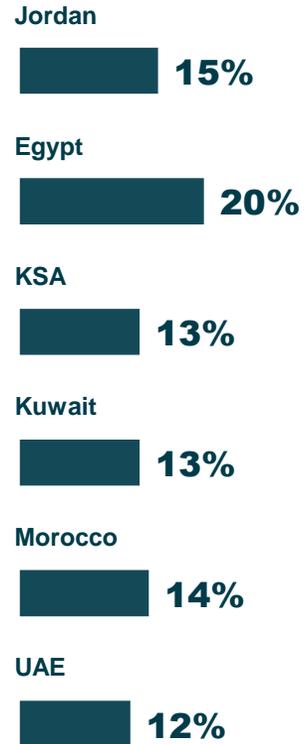
Jordan	87%	78%
Egypt	99%	100%
KSA	81%	81%
Kuwait	89%	77%
Morocco	75%	69%
UAE	87%	80%

Who is the Self Nurturer? (15%)

A person who sees Ramadan as a time not only for spiritual growth but also physical well-being and health consciousness



By Country



Consider Ramadan as a period of physical discipline and health consciousness

95%



Consider Ramadan an opportunity to reset their body

95%



Jordan	91%	95%
Egypt	97%	93%
KSA	96%	95%
Kuwait	100%	98%
Morocco	91%	91%
UAE	93%	99%



Eid Plans

2 in 5 have plans to travel during Eid, mainly domestically



38%

Plan on traveling
during the Eid holiday



25%

Plan on having
a staycation



13%

Plan on traveling
internationally

Travel plans during the Eid holiday

– By country



Plan on traveling during the Eid holiday

38%



Plan on having a staycation

25%



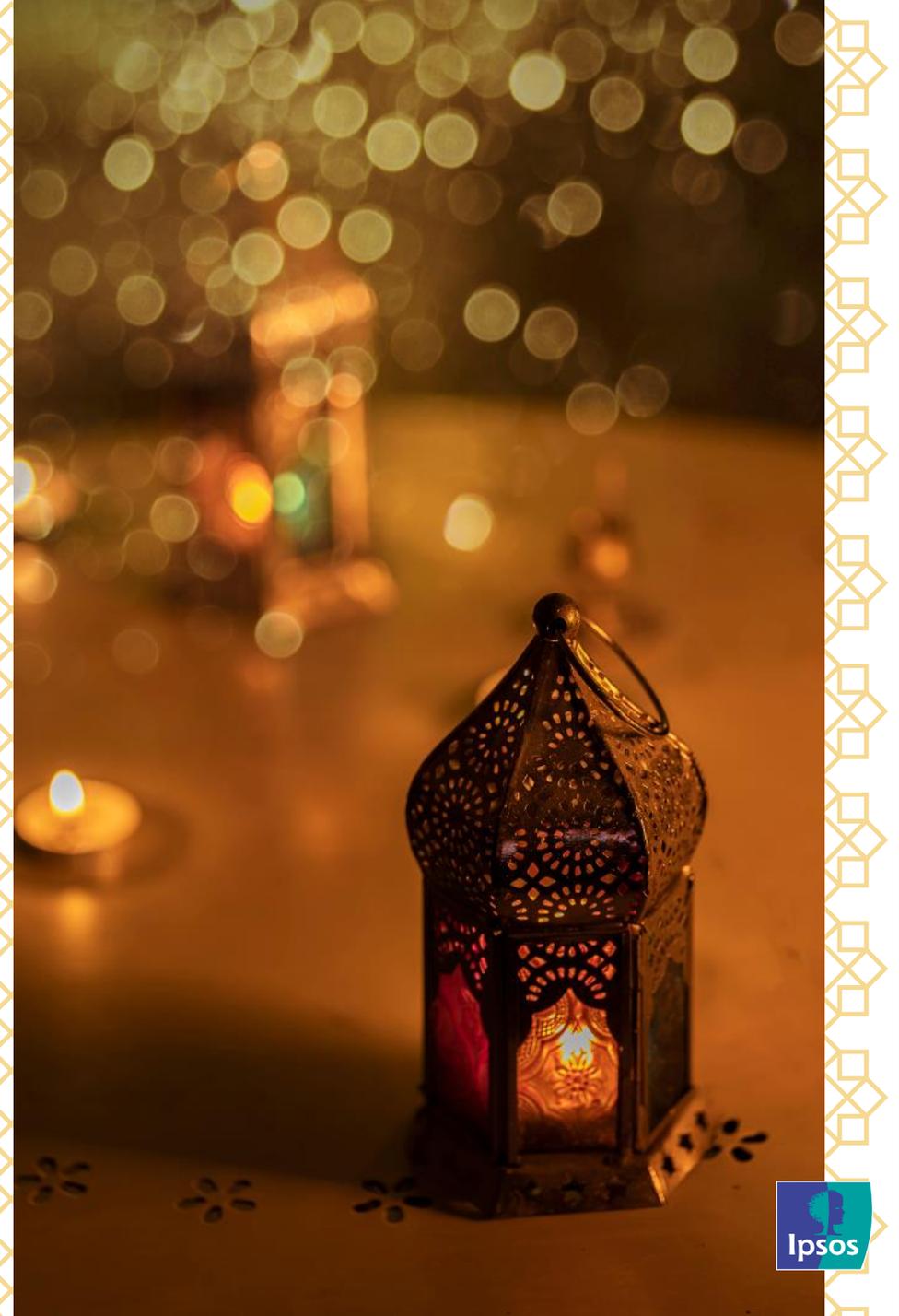
Plan on traveling internationally

13%

	Plan on traveling during the Eid holiday	Plan on having a staycation	Plan on traveling internationally
Jordan	15%	11%	4%
Egypt	25%	21%	4%
KSA	51%	37%	14%
Kuwait	32%	12%	20%
Morocco	39%	29%	11%
UAE	63%	40%	23%

Methodological notes

- 2910 Online/ Telephone Interviews
- 6 Countries In MENA: Jordan, Egypt, KSA, Kuwait, Morocco & UAE
- Nationally Representative
- Males & Females
- 18 Years & Above
- Nationwide Coverage



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GAME CHANGERS

