RESILIENCE AMIDST UNCERTAINTY

Unlock insights into how UAE consumers are redefining trust and value in today's dynamic landscape.

May 2026

Understanding consumer shifts in the UAE

Over recent weeks, heightened uncertainty across the region has **reshaped consumer sentiment and behavior.**

To understand this shift, Ipsos and the ABG (Advertising Business Group) have conducted an online survey using the Ipsos Online Panel between 4–17 April 2026 among a nationally representative sample of 800 UAE residents aged 15+. The study explores how consumers are engaging, spending, and making decisions today.

The underlying reality
Consumers are navigating uncertainty through adjustment rather than avoidance.
The UAE consumer is not pulling back. They are recalibrating how they live, spend, and make decisions.
These shifts are expected to persist, reflecting a structural change in behavior rather than a temporary response.

The new consumer response patterns

- Spending is becoming more intentional
- Digital is becoming the primary decision environment
- Trust is shifting from institutions to networks
- Premium is being redefined as justified value

During unstable times, digital engagement rises

Instability acts as a catalyst for digital consumption, driving both information-seeking (news) and social reassurance behaviors (social + messaging), with youth amplifying this trend

+55%

SOCIAL MEDIA USAGE

Youth aged 15-24 increased their consumption ***1.2x*** *more than those aged 25+ years*

+53%

NEWS WEBSITES & APPS USAGE

+50%

MESSAGING APPS USAGE

Q: How has your usage of the following digital platforms changed recently?

A dual dynamic of caution and optimism is shaping consumer purchases

58%
Desire to save money

54%
Optimism, positive outlook

48%
Need for Comfort, entertainment

39%
Uncertainty about the future

36%
Stress, anxiety

Q: To what extent are the following personal feelings influencing your purchasing behavior currently?

Spending shifts toward essentials and control

While consumers haven't stopped buying, they are increasingly shifting toward controlled consumption by prioritizing essentials, trading down to cheaper alternatives, and reducing their overall spend

73%

FOCUS ON ESSENTIAL PURCHASE

57%

SWITCH TO CHEAPER OPTIONS

55%

REDUCE THEIR SPENDING

Q: Compared to before the current situation, how much do you agree with the below?

PROMOTIONS REMAIN A KEY PURCHASE TRIGGER INFLUENCING THE MAJORITY OF CONSUMERS

4 in 5

Q: Compared to before the current situation, how much do you agree with the below?

Redefining the value proposition: the duality of price sensitivity and promotional discovery

56%
actively seek discounts and promotions
Strong deal-driven behavior

42%
are more price-sensitive than before
Increased financial caution

39%
prefer bundled offers or value deals
Shift toward maximizing value

Q: Which of the following best describes your attitude toward prices and promotions currently?

PREMIUM IS NOT DEAD!
IT IS BRAND-DEFINED.

30%

WILLING TO PAY MORE FOR TRUSTED NAMES

Locals 1.8x more than Arabs

Q: Which of the following best describes your attitude toward prices and promotions currently?

THE ONLINE SHOPPING ECOSYSTEM CONTINUES TO EXPAND

85%

INCREASING OR MAINTAINING USAGE

Q: How has your usage of the following digital platforms changed recently? : Shopping apps/websites

60%

ARE TURNING MORE TO LOCAL BRANDS, WHICH ARE GAINING STRATEGIC RELEVANCE IN UNCERTAINTY

Shoppers aged 45+ are 1.2x more likely to purchase local brands vs. people aged 15-44 years

Q: Compared to before the current situation, how much do you agree with the below? : I buy more local brands

3 in 5

MAJORITY OF TRAVELERS NOW PLAN THEIR TRIPS EARLIER THAN BEFORE, REFLECTING A SHIFT IN PLANNING BEHAVIOR

Emiratis and Arabs are 1.2x more likely to start early planning than non-Arab expats

Q: Compared to before the current situation, how much do you agree with the below? :
I have started planning my upcoming trips (e.g., summer holidays) earlier than before

62%

OF TRAVELERS NOW PRIORITIZE DOMESTIC/REGIONAL DESTINATIONS AS A PROACTIVE CHOICE FOR CERTAINTY AND SECURITY

Q: Compared to before the current situation, how much do you agree with the below? :
I have started planning my upcoming trips (e.g., summer holidays) earlier than before

7 in 10

ARE ACTIVELY CAPITALIZING ON LOCAL HOSPITALITY AND F&B OFFERS, REFLECTING A HIGH-ENGAGEMENT "STAYCATION" ECONOMY.

Emiratis and Arabs are **1.2x** more likely to start early planning than non-Arab expats

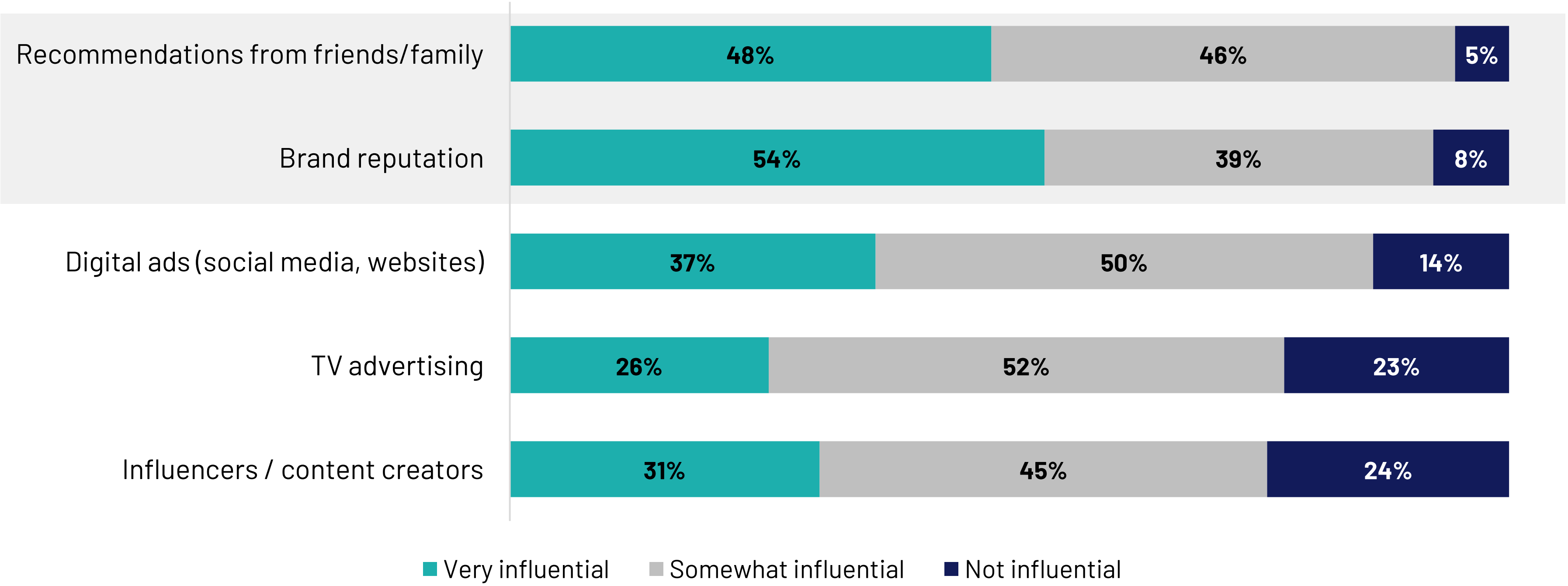
Q: Compared to before the current situation, how much do you agree with the below? :
I benefit more from offers provided by hotels and restaurants

1 in 2

ENGAGE WITH ADS WHILE BROWSING SOCIAL OR STREAMING CONTENT, MAKING DIGITAL A CORE VISIBILITY DRIVER

Q: In which situations are you MOST likely to notice ads now?

Word of mouth and brand trust lead purchase decision-making, alongside exposure to brand communications



Q: How influential are the following sources when making your purchase decisions currently?

Trust in influencers is reinforced when content feels relevant, transparent, and grounded in context

63%
trust them more when they acknowledge the situation before promoting a product

62%
value transparency on paid partnerships

60%
also find promotional content inappropriate during sensitive moments

Q: To what extent do you agree with the following statements about influencers nowadays?

1.6x

MILLENNIALS (15–34) ARE 1.6x MORE LIKELY TO BE INFLUENCED BY INFLUENCERS THAN 35+ AUDIENCES

Q: How influential are the following sources when making your purchase decisions currently?

LEARNINGS FOR MARKETERS IN THE UAE

Design for “control-driven consumption”

Build a “digital-first” not “digital-only” ecosystem

Compete in the attention economy, not just media reach

Shift from institutional trust to social validation

Anchor communication in “stability and relevance”

4 KEY TAKEAWAYS

**With over 70% of consumers showing lasting behavioral shifts,
brands must prioritize long-term strategies built on reassurance, consistent value, and locally relevant narratives in the UAE**

1

Design for "control-driven consumption"

Consumers are not cutting spend, they are rebalancing toward control, value, and certainty (~70–80%).

Brands must shift from "aspiration-led" messaging to utility, reassurance, and value clarity.

2

Build a "digital-first, not digital-only" ecosystem

With 85% maintaining or increasing digital usage, digital is the default layer of engagement.

But winning brands integrate seamless offline credibility (retail, service, trust signals) into digital journeys.

3

Compete in the attention economy, not just media reach

With 80%+ increasing or maintaining news/media consumption, audiences are active, but fragmented across 3+ sources.

Brands must orchestrate presence across formats (short updates, explainers, social proof) rather than rely on single-channel dominance.

4

Shift from institutional trust to social validation

With 65–75% relying more on close networks, trust is increasingly peer-led rather than institution-led.

Brands need to activate communities, micro-influencers, and peer advocacy loops, not just top-down messaging

THANK YOU

Need more information ?
Let’s connect !

Athanas Jamo
Chief Client Director
athanas.jamo@ipsos.com
Ipsos / MENA