



Get your wishes fulfilled



Make the most of your marketing in the Middle East during Ramadan



Ramadan Rundown

This year, Ramadan will begin on May 15th – eleven days before it did last year (May 26th)



Ramadan this year will be from May 15 - June 14, with Eid al-Fitr celebrations on Friday June 15. The Ramadan period last year was May 26 – June 24, followed by Eid al-Fitr on June 25.

There's a significant uplift in online retail sales during the Ramadan month, and particularly in the last couple of weeks before Eid al-Fitr as consumers buy gifts and presents for family, relatives and friends.

Travel sales are also impacted by Ramadan and the rise in bookings start to happen during Ramadan weeks and peak in the days after Eid al-Fitr. It is also the time when people look to make bookings and travel for their summer holidays.



Ramadan behaviors UAE



Travel	Meals	Shopping	Products	Payments
38% are planning to travel by plane for Eid	46% plan to eat out of home at least once a week during Ramadan	58% plan to buy gifts for others during Ramadan	47% are likely to buy perfume/toiletries online to give as presents	55% plan to pay cash on delivery for their online purchases
36% are expecting visitors for Eid celebrations	78% will eat out in restaurants during Ramadan	46% will use their mobile phones to research for gifts	45% plan to make online purchase of clothes for themselves	31% are likely to pay for their travel bookings on mobile
59% of the visitors will be coming from abroad	26% plan to order food for home delivery during Ramadan	59% state the introduction of VAT will impact their Ramadan spending habits	60% are likely to shop online for a phone or another electronic item	15% are willing to spend over AED 1000 on buying gifts online

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Ramadan behaviors KSA



Travel	Meals	Shopping	Products	Payments
42% are planning to travel by plane for Eid	38% plan to eat out of home at least once a week during Ramadan	61% plan to buy gifts for others during Ramadan	47% are likely to buy perfume/toiletries online to give as presents	59% plan to pay cash on delivery for their online purchases
54% are expecting visitors for Eid celebrations	65% will eat out in restaurants during Ramadan	42% will use their mobile phones to research for gifts	49% plan to make online purchase of clothes for themselves	34% are likely to pay for their travel bookings on mobile
45% of the visitors will be coming from abroad	15% plan to order food for home delivery during Ramadan	64% state the introduction of VAT will impact their Ramadan spending habits	49% are likely to shop online for a phone or another electronic item	20% are willing to spend over SAR 1000 on buying gifts online

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Retail and Ramadan

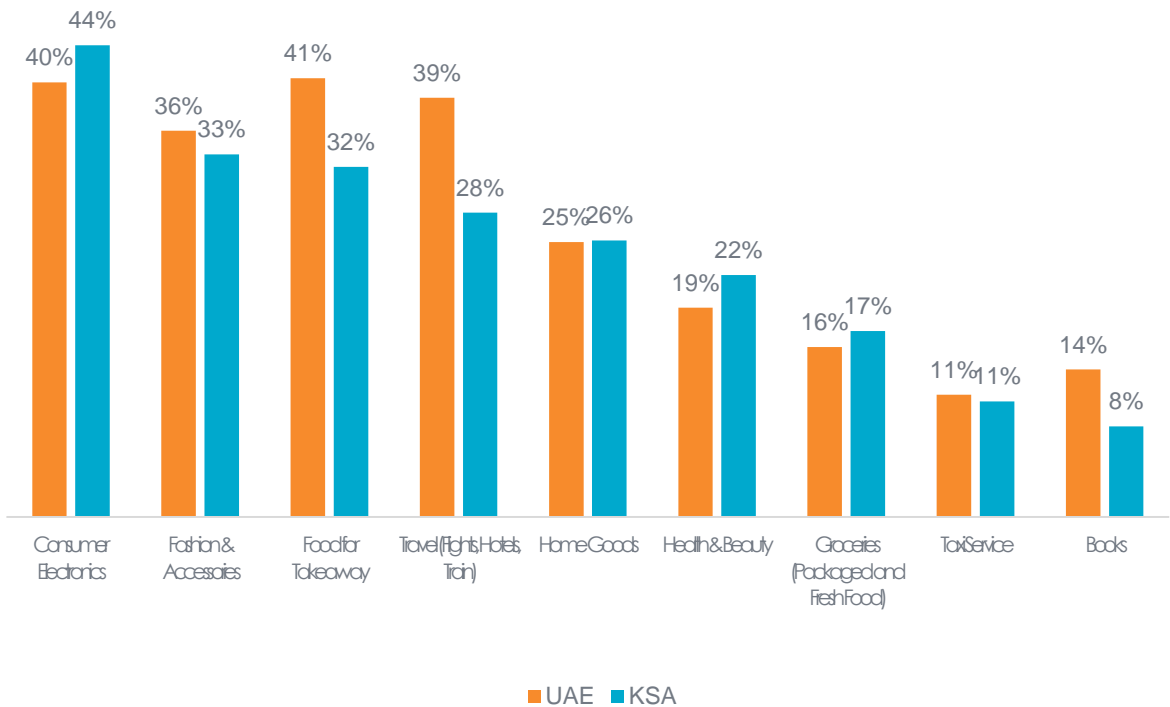
What's the effect of Ramadan on retail sales, when are the peak sales periods, and what are the top performing retail sub-verticals?



Middle East shoppers are buying a wide range of products online



Which are the product/service categories that you purchase online? (Percent of respondents)

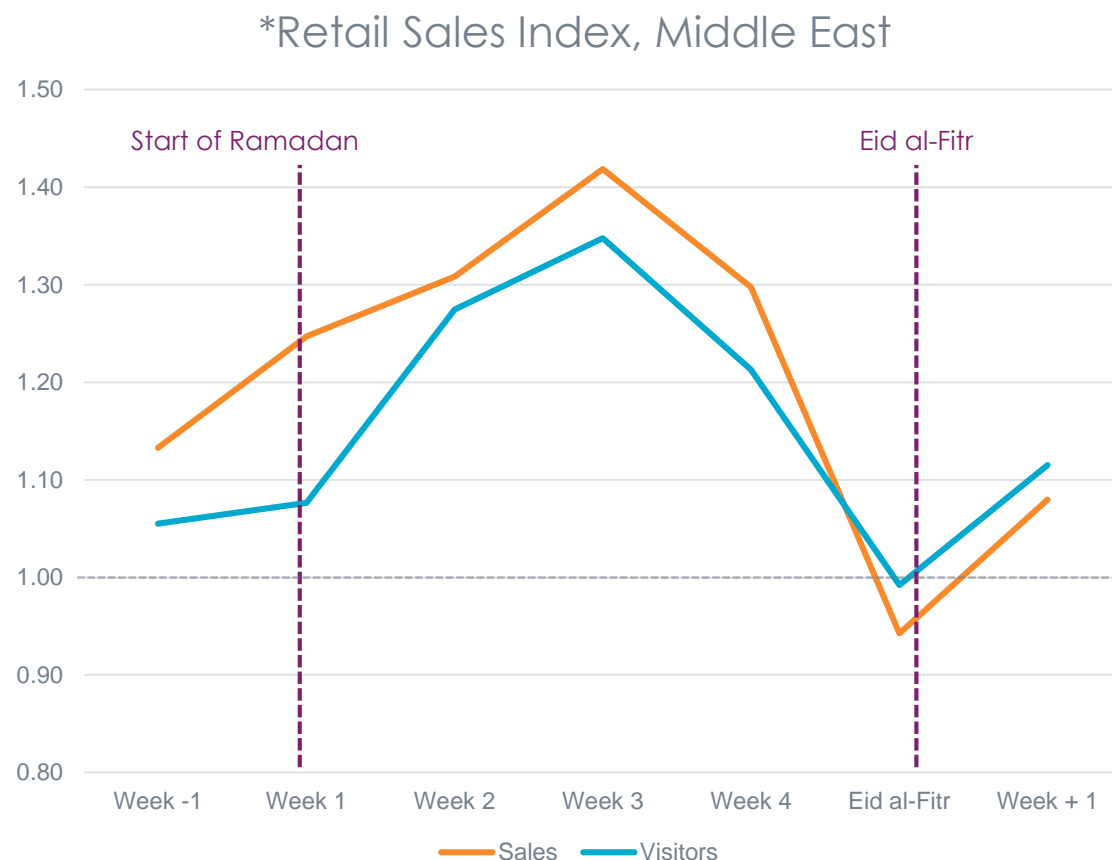


Consumer Electronics, Fashion, Food and Travel lead the way but people are shopping online for other products too.

The viability of some categories, such as groceries, is likely to improve in the coming years with better fulfilment options.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

29% uplift in online retail sales during Ramadan



**Indexed online weekly sales during Ramadan. Baseline equals average Index of 1 during Feb 10 – May 12, 2017*

Uplift in retail sales during Ramadan is 29%, with a 21% uplift in visitors.

The highest uplift in online retail sales and visitors is seen in the week before Eid al-Fitr. Weekly retail sales showed a maximum uplift of +42% and visitors +35% in ME during Ramadan.

Sales and visitors drop in the week of Eid al-Fitr due to the fact that many are travelling during this period, but sales still remain higher than average.

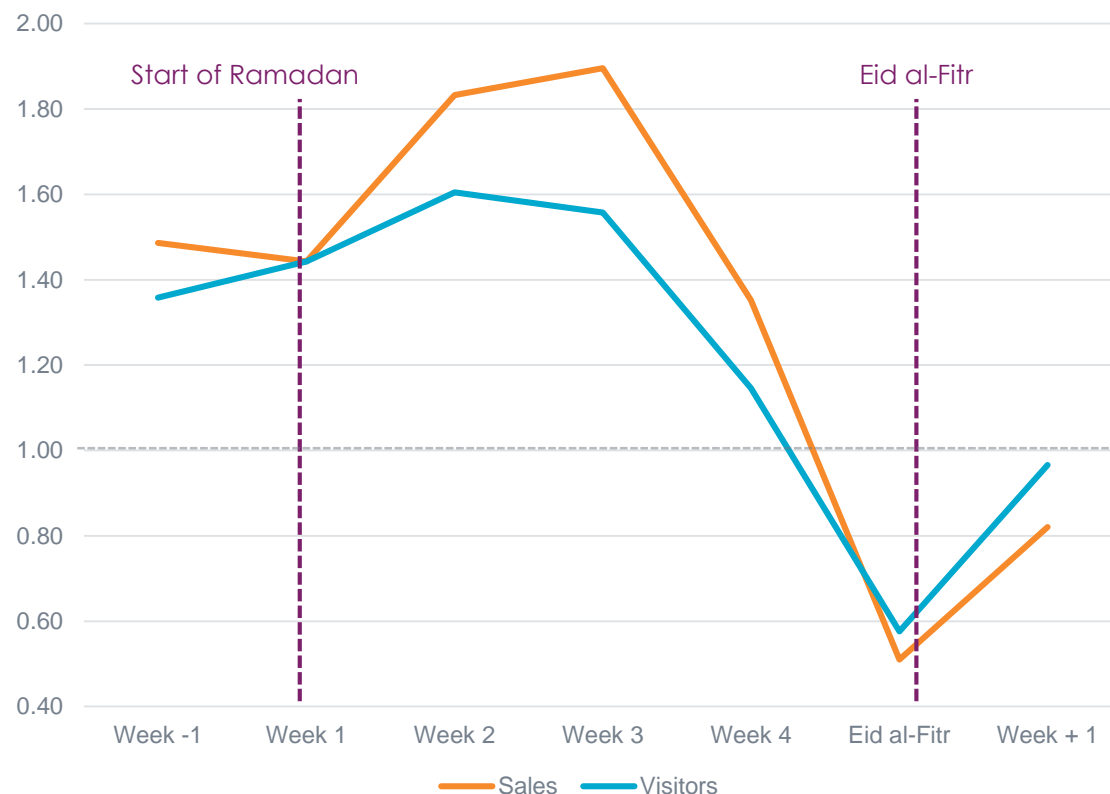
Key Message

Shoppers start buying before Ramadan begins and the trend continues to escalate during first few weeks, with highest uplift in sales seen on the third week. Advertisers should ramp up their campaigns accordingly to get early visibility.

55% increase in fashion sales during Ramadan



*Fashion Sales Index, Middle East



**Indexed online weekly sales during Ramadan. Baseline equals average Index of 1 during Feb 10 – May 12, 2017*

Uplift in sales during Ramadan for the fashion sector is 55%, with a 37% uplift in visitors.

At the highest point during Ramadan sales are 90% higher, and visitors 60% higher than the average weekly figure in the 3 months beforehand. This occurs earlier than retail on the second and third week, then drops significantly below the average on the final weeks.

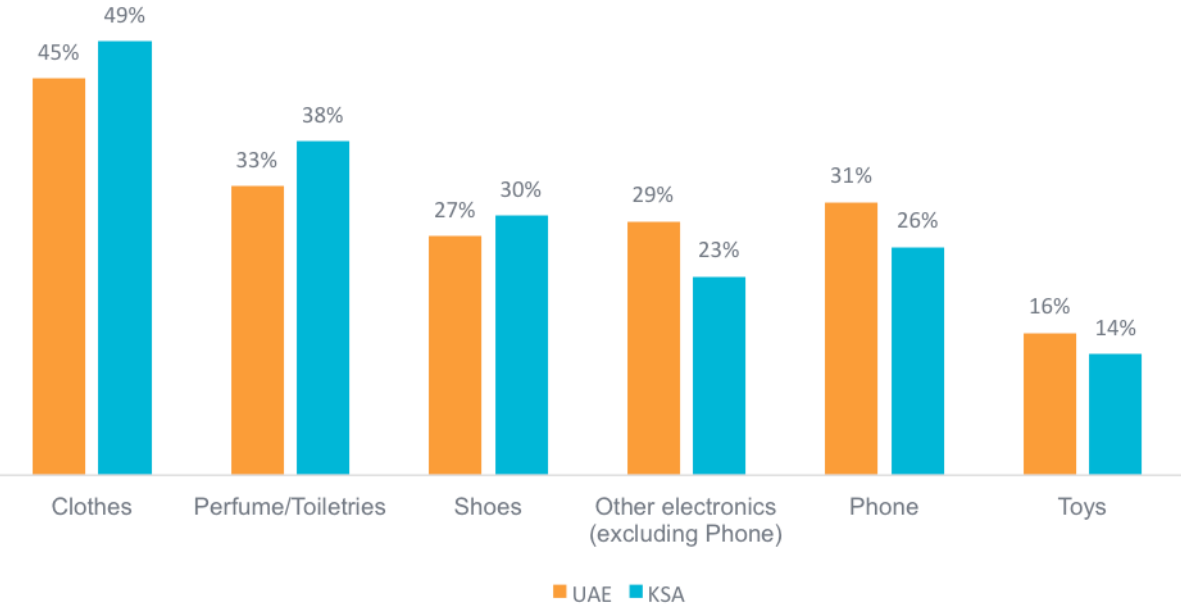
Key Message

Users are preparing their wardrobe for family, friends and work engagements even before Ramadan begins. Essential to capture user behaviour in the month beforehand to influence the purchase decision when the individual is ready to buy.

Clothes, perfumes and shoes are most popular online purchases



What categories are you most likely to buy online when you buy for yourself?
(Percent of respondents)



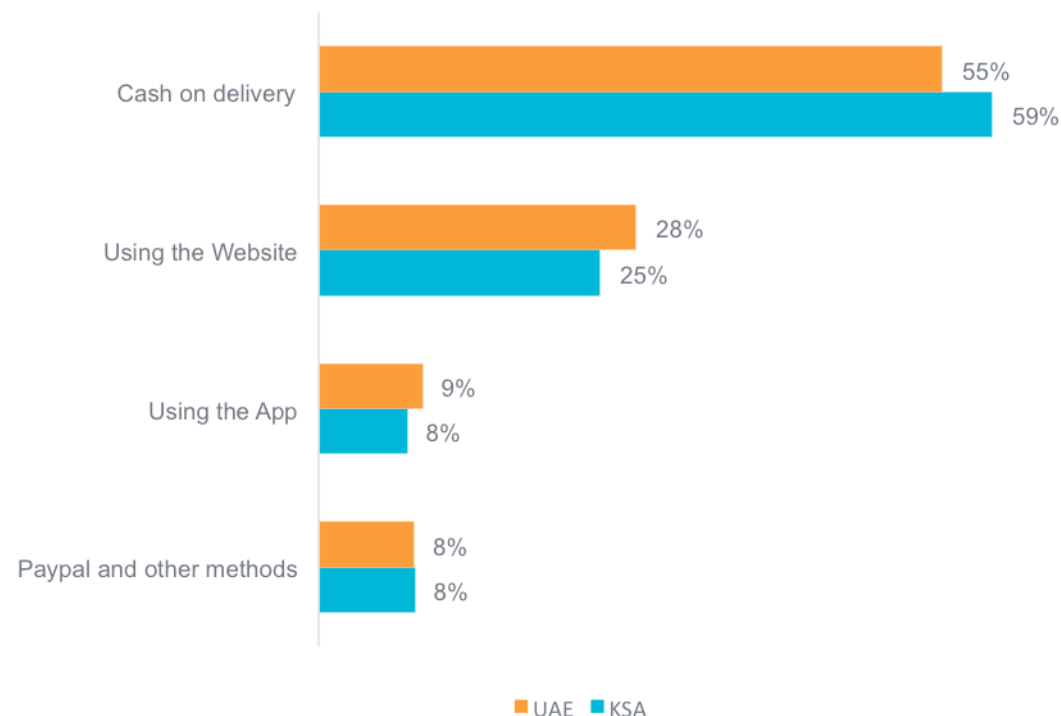
Consumers are shopping across various product categories and are increasingly using the internet to find the best deals.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Most prefer paying cash on delivery for online purchases



How will you pay for your online purchase?
(Percent of respondents)



The majority of consumers shopping online in Middle East still prefer to pay cash on delivery for their purchases.

Key Message

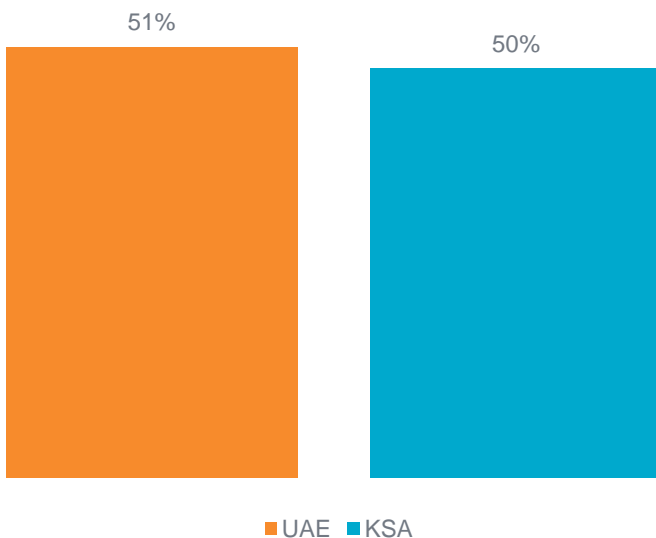
Retailers offering cash on delivery and multiple payment options will win more sales during Ramadan.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Consumers are also buying/willing to buy from retailers abroad



Are you considering purchasing online from
non UAE/KSA/Turkey retailers?
(Percent of respondents saying yes)



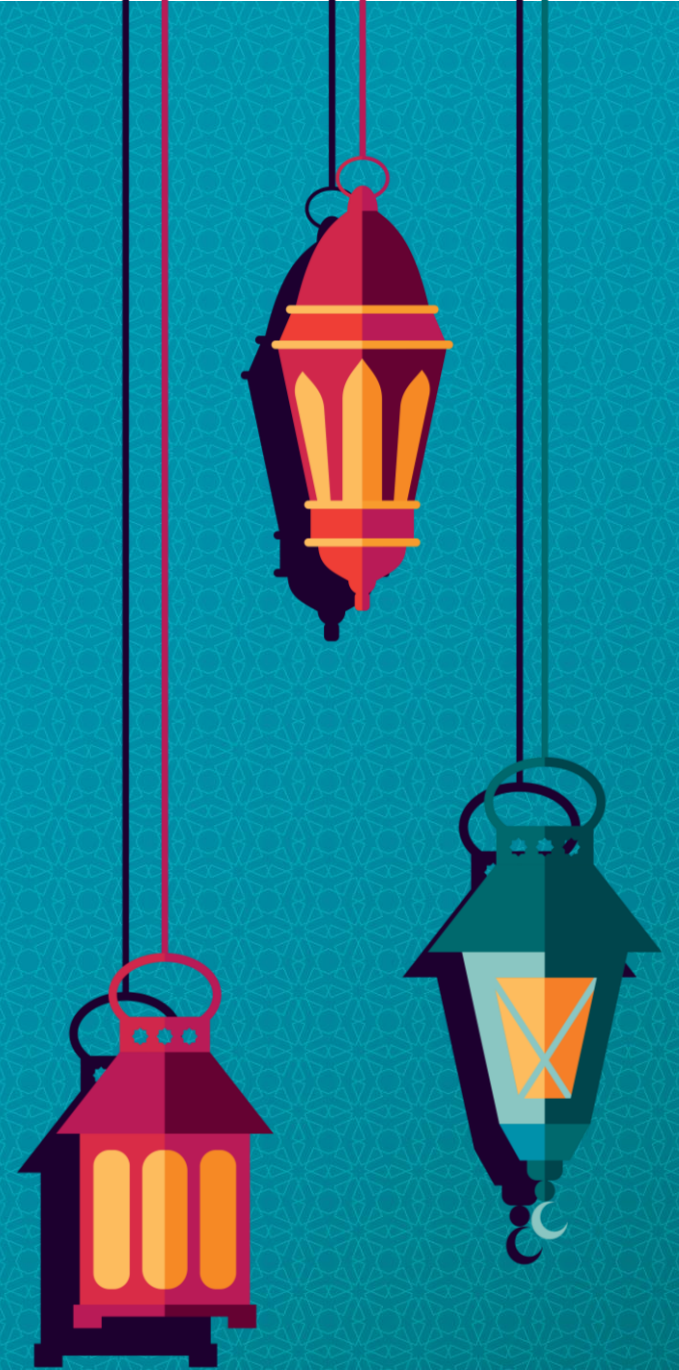
Every second shopper in UAE and KSA is already making online purchases (or is considering to do so) with foreign retailers.

This trend will continue to grow as retailers in the region start providing more cost effective and quicker delivery options.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Ramadan and Travel

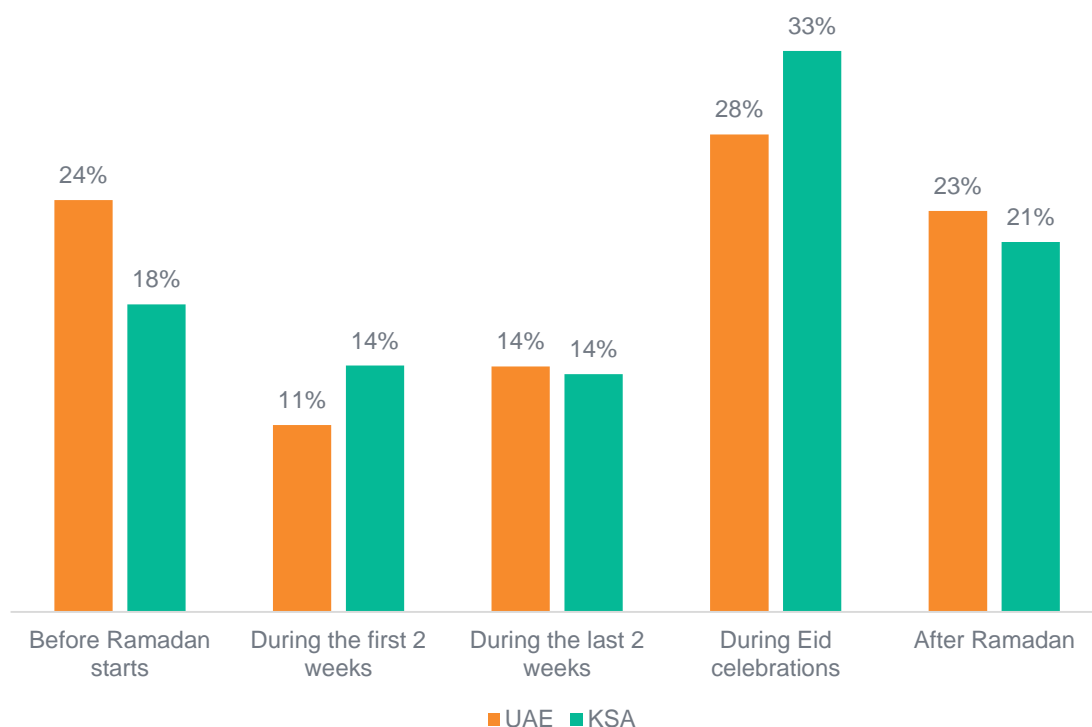
How should you plan your travel campaigns for Ramadan?



Many are planning to travel during Eid and after Ramadan



When will you travel?
(Percent of respondents)



People are traveling less during the Ramadan weeks but that is followed by a massive surge in travel during Eid al-Fitr, and the week after.

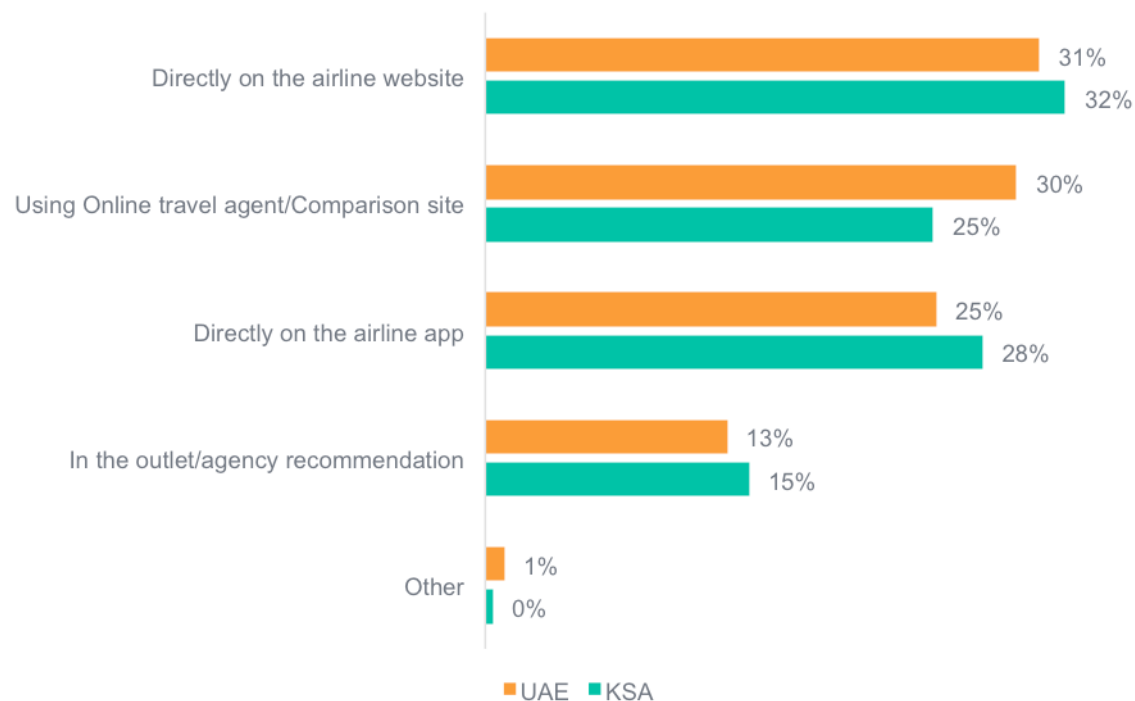
The big surge post Ramadan is because the period also corresponds to the summer holidays. People in Middle East tend to book their trips not a long time in advance.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Travel bookings happen mostly via online channels



Where will you purchase travel tickets?
(Percent of respondents)

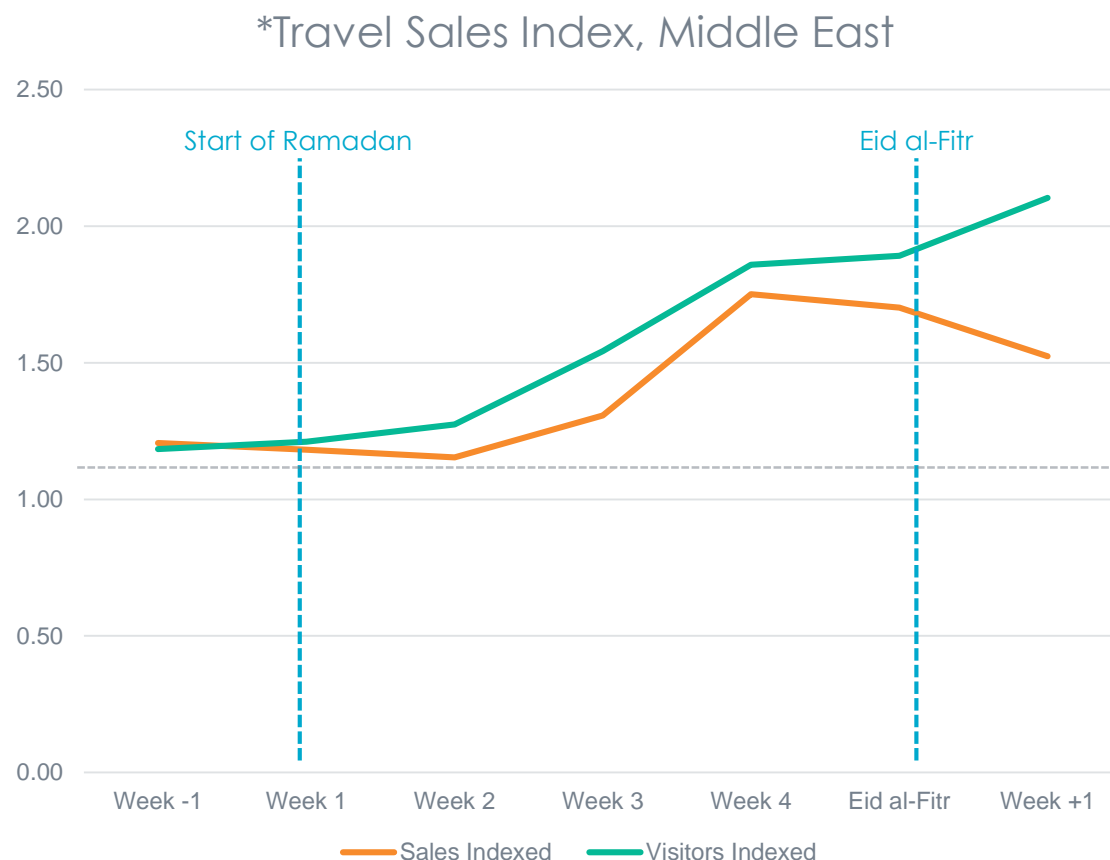


Nearly 85% purchase their travel tickets online on the airline website, travel agent or comparison site, or via the airline app.

At least 1 in 4 purchase travel tickets using the airline app which indicates that people feel comfortable purchasing via apps.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

39% uplift in travel sales during Ramadan



**Indexed online weekly sales during Ramadan. Baseline equals average Index of 1 during Feb 10 – May 12, 2017*

Overall travel sales uplift 39% and visitors 49% during Ramadan.

Travel illustrates the opposite trends to retail with little change in consumer behaviour until the third and fourth week where they dramatically spike. Sales spike in the fourth week of Ramadan with weekly travel sales +75% and visitors 89% higher in ME.

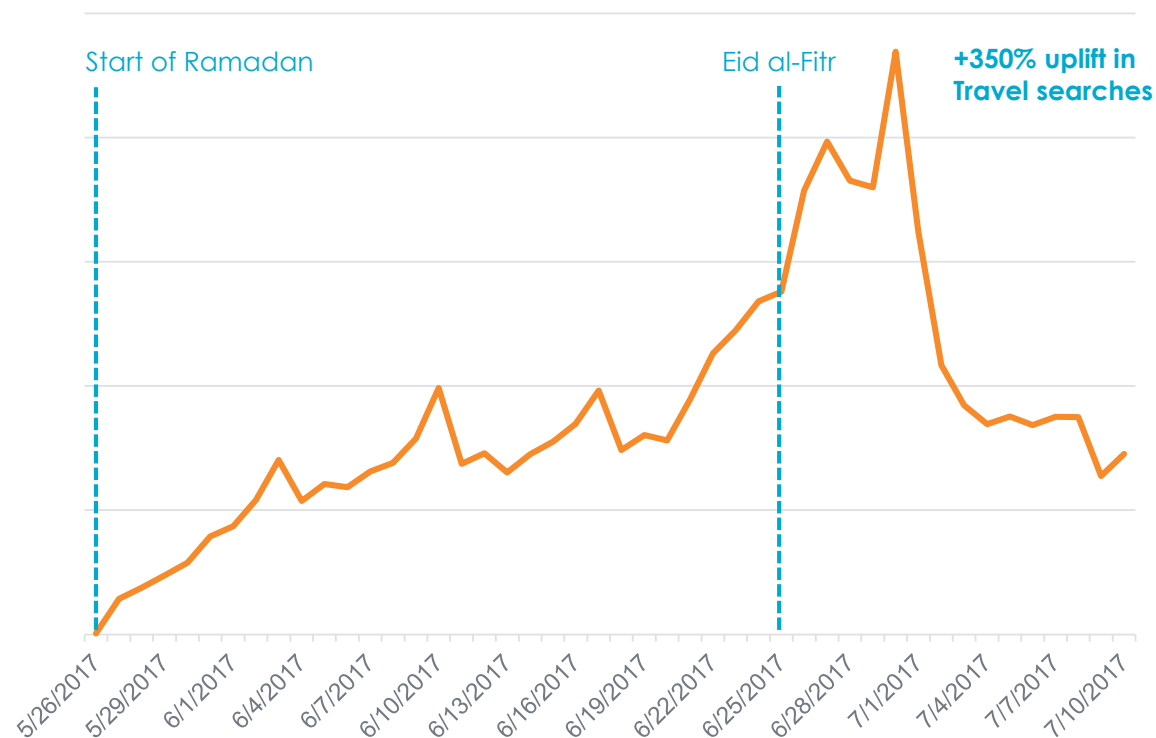
Key Message

The majority of consumers book their holidays over the final weeks for their extended Eid break. Be prepared to maximize this short window of opportunity.

Travel searches are up +350% after Ramadan



*Travel Searches made during Ramadan 2017



*Trend showing online travel searches during Ramadan compared to the average during Feb 10 – May 12, 2017

Travel searches steadily increase during the first 25 days of Ramadan and a massive increase is witnessed after Eid al-Fitr with an increase of +350% seen on June 30, compared to the average period.

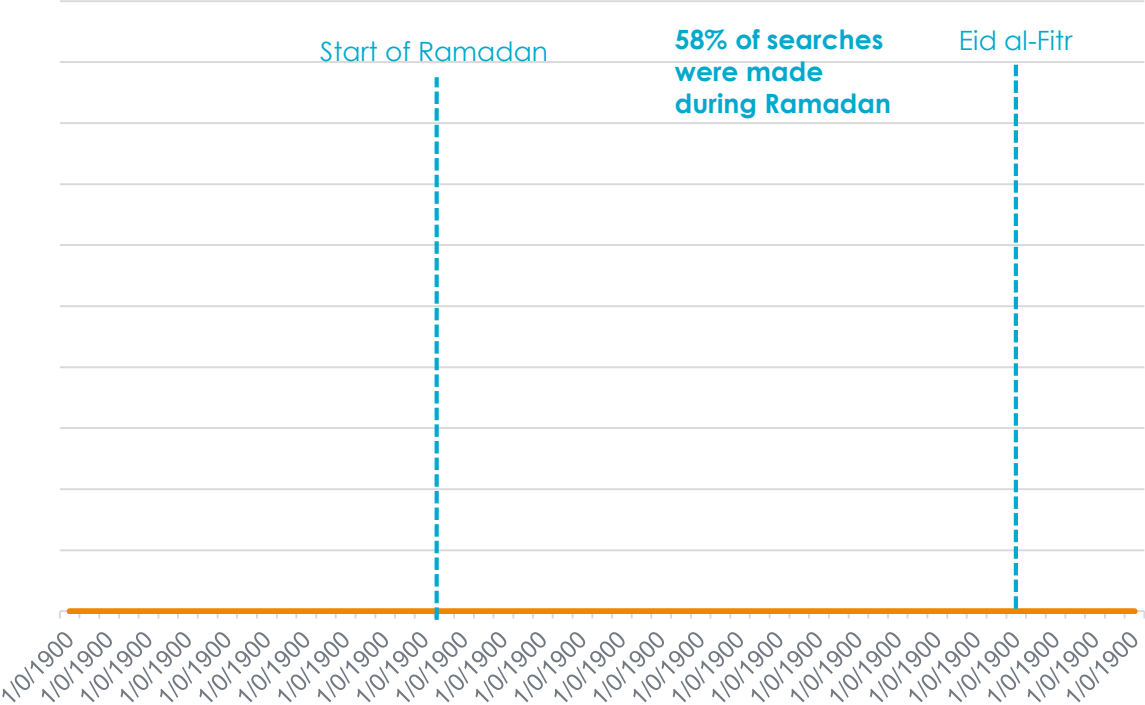
Insight

Reaching consumers on app and mobile web can help travel advertisers win more sales in the week after Eid al-Fitr.

58% of all searches for a departure were made during Ramadan



Daily searches for a departure during Ramadan



**Trend showing online travel searches during Ramadan compared to the average during Feb 10 – May 12, 2017*

People start searching for departures in the beginning of Ramadan - 58% of the searches were made during the Ramadan Month in 2017.

The trend confirms that many are looking to travel in the weeks following Ramadan but do not plan their trips a lot in advance.

Mobile shopping during Ramadan

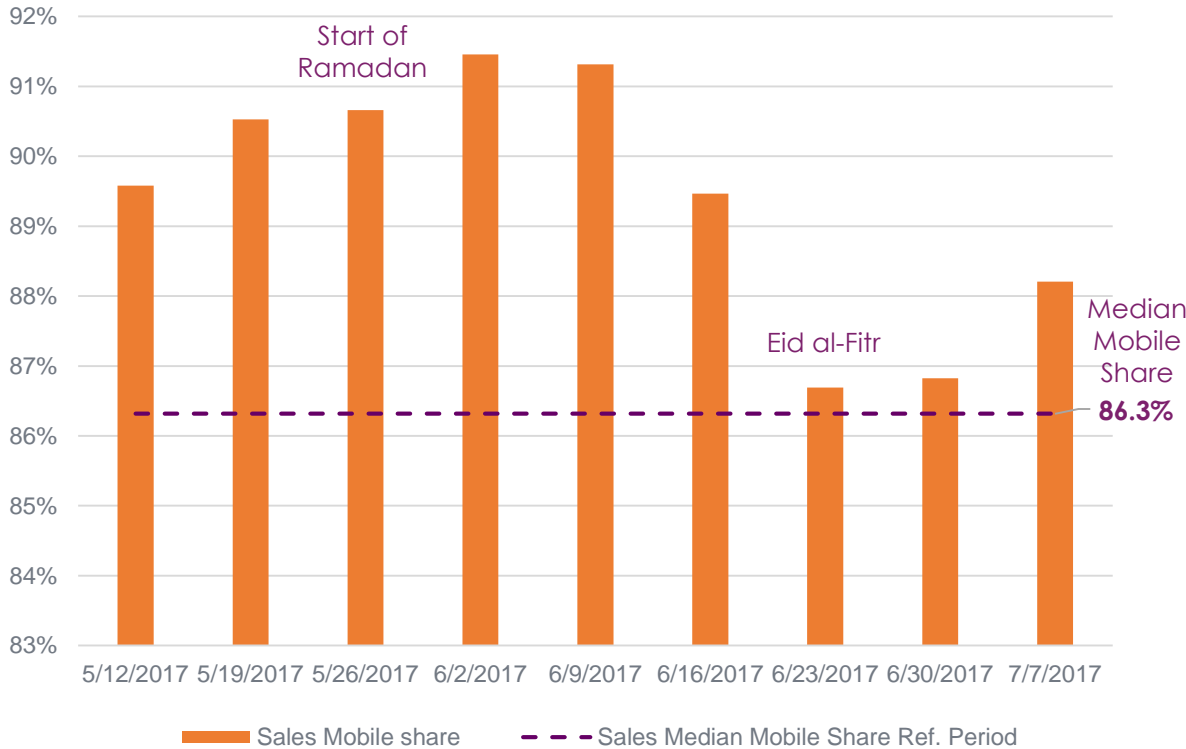
How much are people shopping on mobile during Ramadan?



Mobile sales peak during Ramadan



*Weekly Mobile Share of Retail Fashion Sales

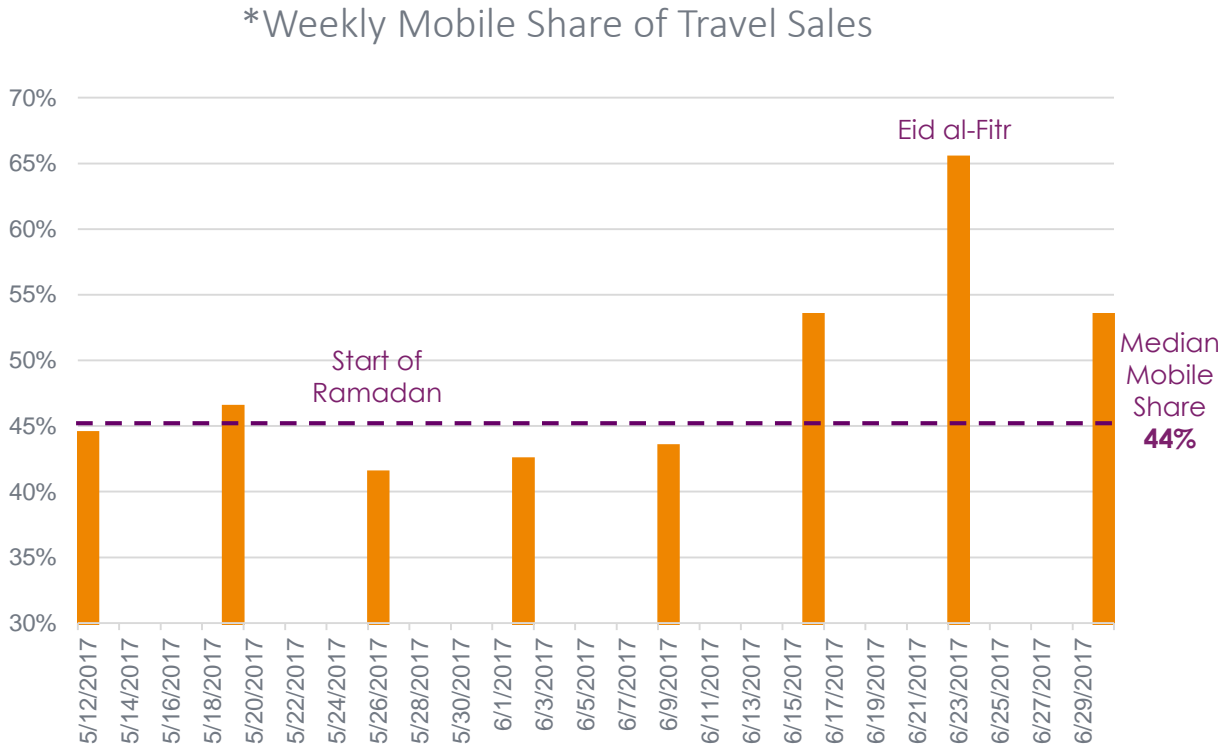


**Weekly mobile shares compared to median mobile share during Feb 10 – May 12, 2017*

Weekly share of mobile retail sales rose to 91%+ during the Ramadan month. Share of retail sales on mobile remain high and help to make up for the drop in desktop sales on weekends.

Targeted in-app marketing can help advertisers drive even more mobile sales during Ramadan.

Mobile bookings keep travel sales up as Ramadan ends



**Weekly mobile shares compared to median mobile share during Feb 10 – May 12, 2017*

There is a sharp increase in mobile share of travel sales in the last weeks of Ramadan – indicating the growing tendency of consumers to make travel bookings on mobile.

Key Message

In order to win more sales, get users to download your travel booking app before Ramadan starts. Then start promoting your offers to drive visits and re-visits, and keep your app users interested during the Ramadan month.

Top tips for the run up to Ramadan



Start a couple of weeks before Ramadan begins

- Ramp up your shopping campaigns early in the Ramadan weeks leading up to Eid al-Fitr

Reach your shoppers on app and mobile web

- Optimize your site and app for increased sales and bookings. Reaching consumers on app and mobile web helps to maintain good sales during the Ramadan weekends.

Convenience and ease of use drive app usage and revisits

- The key drivers for app installation are convenience and ease of use. Apps that provide the best user experience prove the most successful. Ensure that your app provides a smooth and seamless path to purchase.



Methodology

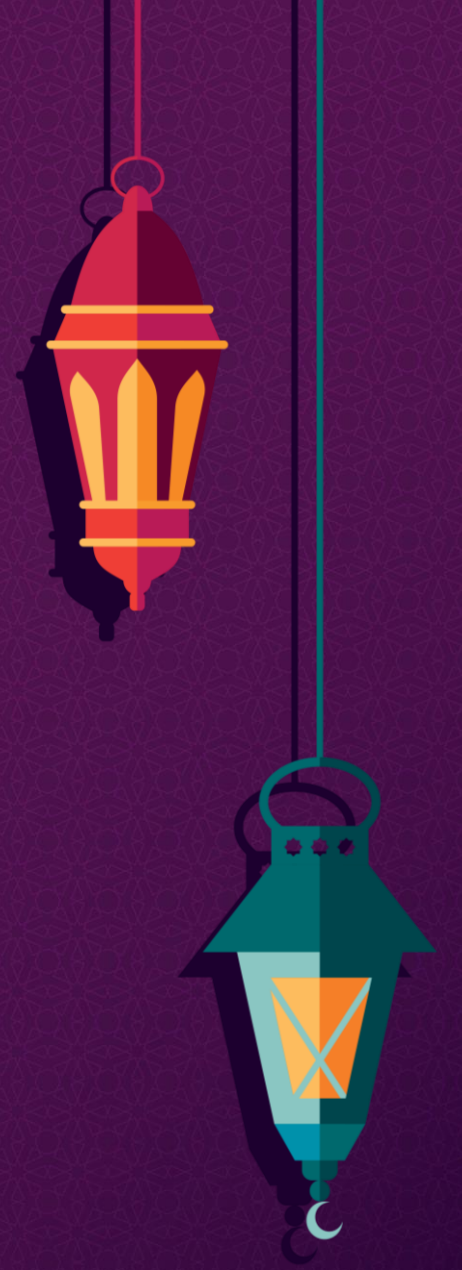


Criteo identified these trends through the analysis of over 4.2 million retail shopping transactions, and over 7.7 million travel sales bookings across desktop, smartphones and tablets from 94 major advertisers in ME.

Mobile sales include sales via mobile websites and apps - both on smartphones and tablets.



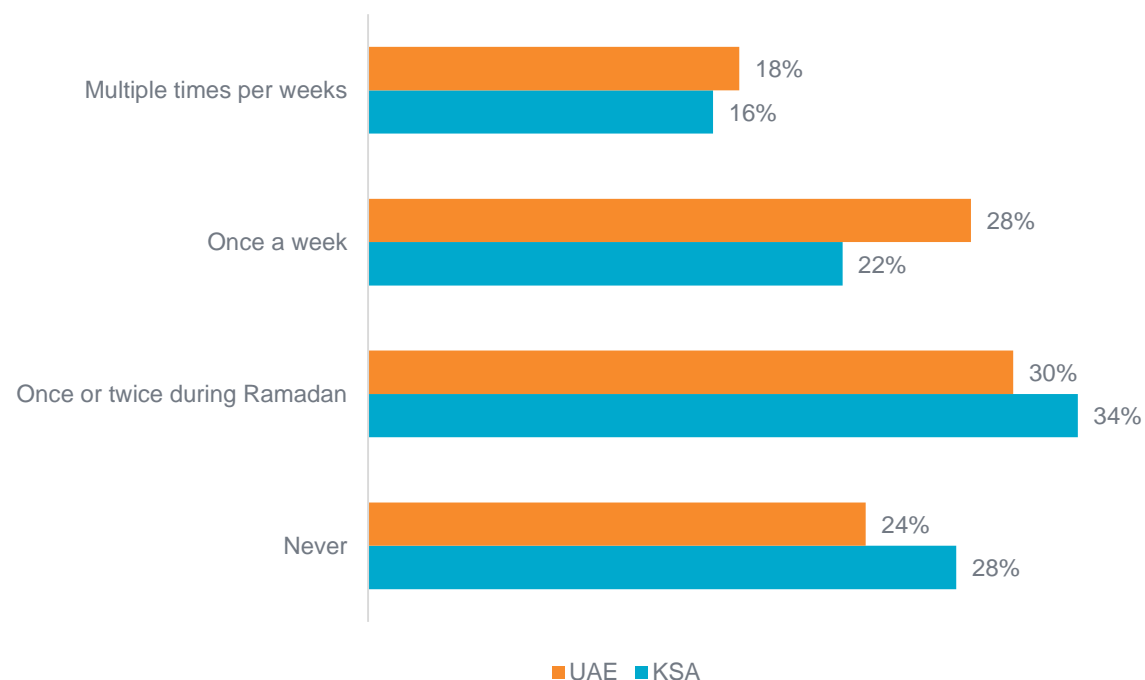
Additional Slides



Most will be eating out of home during Ramadan



How often will you be eating out of home in the evenings during Ramadan?
(Percent of respondents)



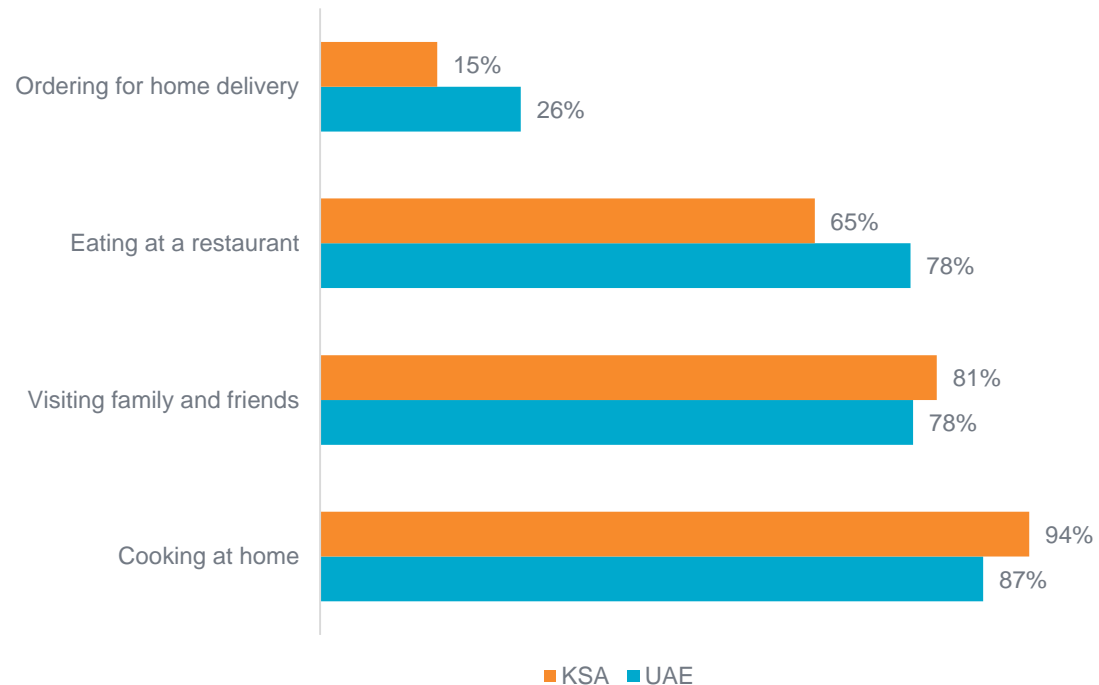
7 out of 10 consumers will be eating out of home at least once or twice during Ramadan – and a majority of those will be eating out every week.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

4 in 5 will eat at a restaurant or order for home delivery



To have your Ramadan meals, would you be ... ?
(Percent of respondents saying yes)



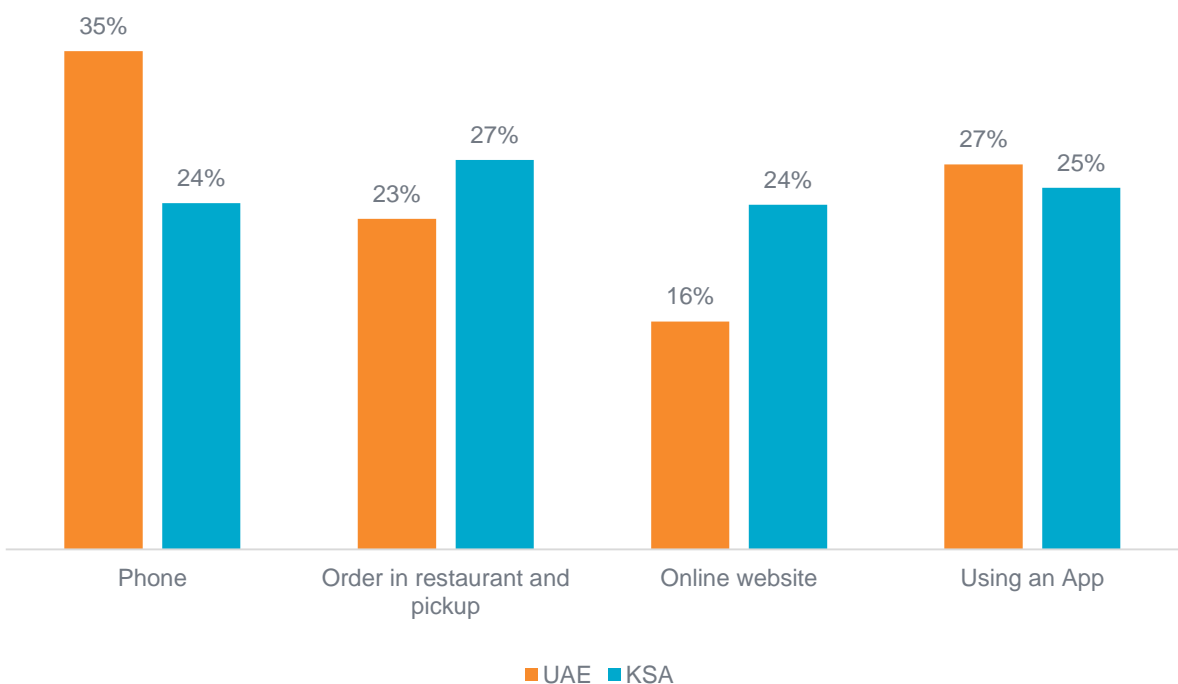
Mostly people will use their mobile phones to order online for home delivery.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Increasingly people now place online orders for food delivery



How do you order for food when eating at home?
(Percent of respondents)



Many consumers now feel more comfortable placing online orders for food delivery using the website and app. More are now placing orders using apps than via the website.

Key Message

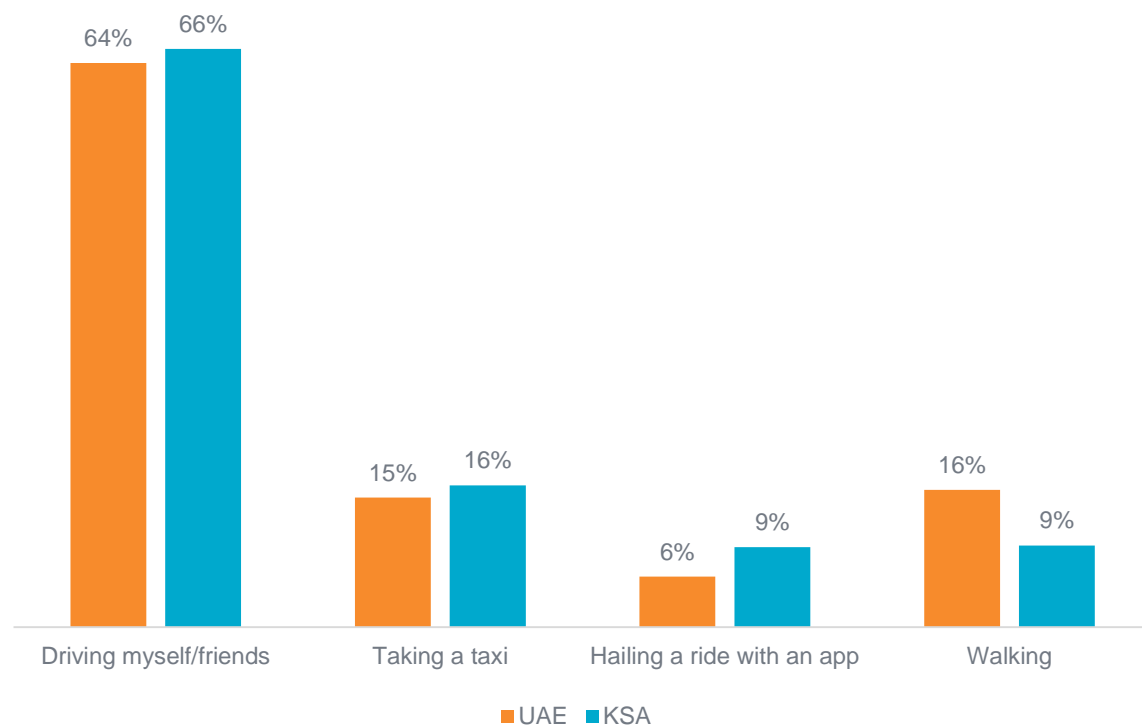
A well designed app is more enjoyable and convenient to use than buying via a mobile site, considering that a majority of consumers place orders for food delivery using mobile.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Some are also using apps to book taxis for eating out



When eating out, how will you be more likely to travel?
(Percent of respondents)



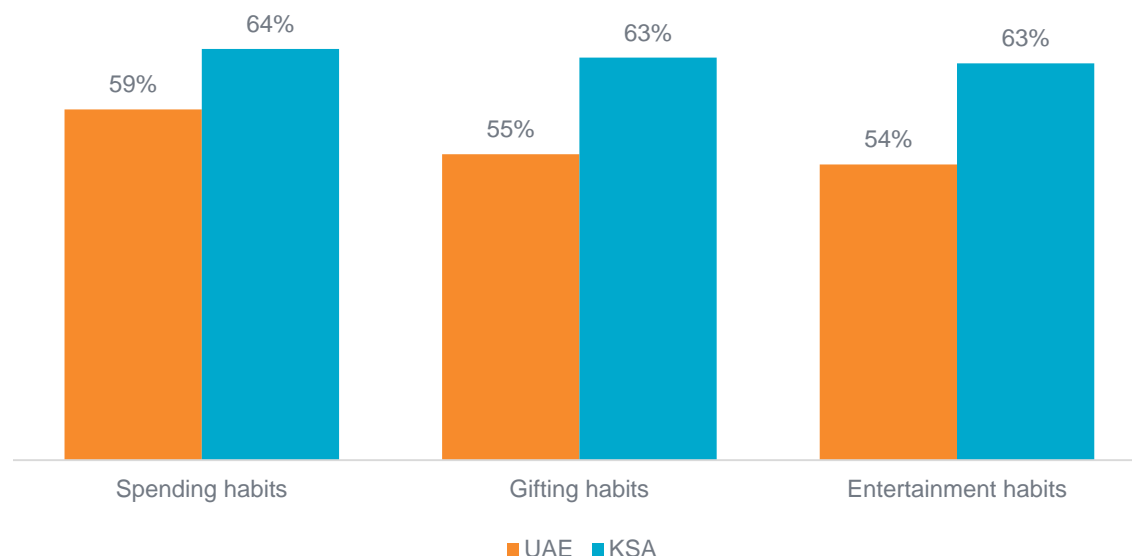
A surge for taxi bookings can be expected during the Ramadan month as people go out to enjoy meals at restaurants, or visit family/friends in the evenings.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018

Most believe VAT will impact their Ramadan habits



Will the introduction of VAT impact your Ramadan ?
(Percent of respondents saying yes)



A majority of consumers stated that the introduction of VAT will have an impact on their spending, gifting and entertainment habits during Ramadan.

Source: TGM, Ramadan Consumer Behaviour, UA, KSA & Turkey, 2018