

# RAMADAN STUDY 2021

Middle East and North Africa



اسياني

# EXECUTIVE SUMMARY

Millions of Muslims in the Middle East and North Africa celebrate the holy month of Ramadan. This year, Ramadan will last from 13 April to 12 May. This will be the second year where Muslims around the world observe Ramadan during the pandemic era. The purpose of this online study is to investigate the effects of this “new normal” on the behavior of consumers during the observance of the holy month in 2021.

## RAMADAN DAILY

Consumers' experiences during the holy month remains the same. The challenge of the changes in daily routine is still there. Reading the Quran hours before Iftar is still in practice. Consumers are still looking forward in watching their favorite Ramadan series. Ramadan topics are the most sought-after content online. Everything looks and feels the same but what if COVID-19 is added in the equation?

## COVID-19 SENTIMENTS

Almost everyone claims that the situation has affected them in some or major ways. Taking the matter very seriously. But even in the darkest times, Muslims tend to stay positive saying that the situation will change the way they observe Ramadan, but the change will be in a positive way though they also think that COVID-19 will not end this year.



## RAMADAN & THE NEW NORMAL

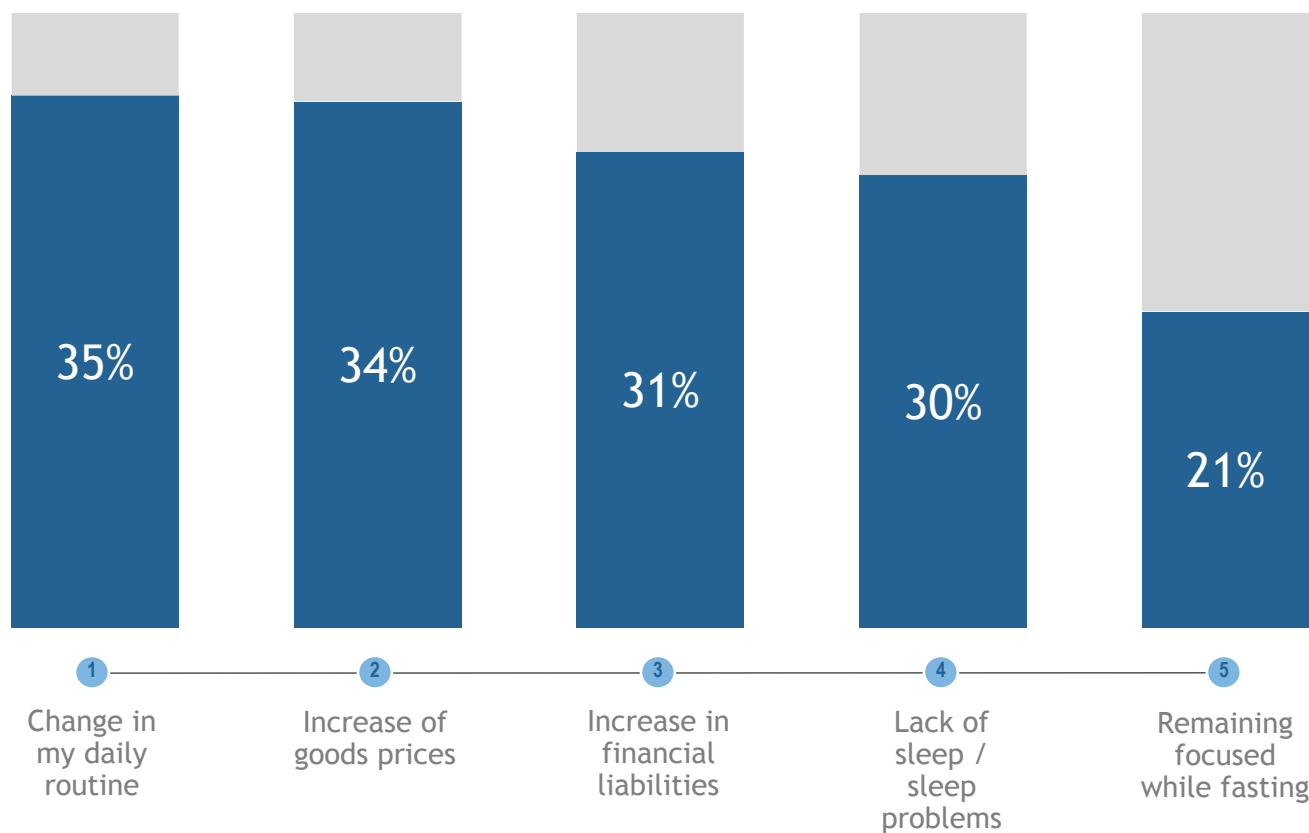
Ramadan, by tradition, is the time of year where Muslims get together in vast numbers with family and friends. But due to the pandemic, mobility becomes limited. Social gathering and eating out becomes uncomfortable. Muslims tend not to eat Iftar in restaurants and Ramadan tents. Online delivery services become less. In-store trips are replaced by online buying. Cleaning items and medicines are now in-demand.

## GETTING VACCINATED

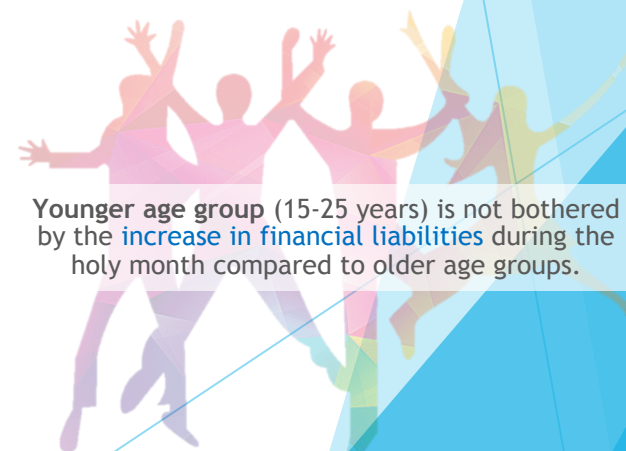
At the start of the pandemic, different countries around the world worked hand-in-hand in developing the vaccine that will put an end to this virus. Muslims in the region are still skeptical on the efficacy of the vaccine. Even so, more than half are planning to get/went for the jab. Those who tend not to get it says they are worried about the side effects of the vaccine.

# Biggest challenges during Ramadan

The biggest concern among the consumers during the holy month is the change in their daily routine (35%). This means moving away from their comfort for one whole month. Almost at par is the foreseen increase in prices of goods (34%).



It is important to note that men are more worried about the **increase in financial liabilities** than their women counterpart.



Younger age group (15-25 years) is not bothered by the **increase in financial liabilities** during the holy month compared to older age groups.

# Activities hours before Iftar

Reading the Quran



59%

Ramadan resonates the spirituality of every believer. As such, reading the Quran is the foremost (59%) activity before the Iftar.

Cooking



42%



27%



When looking at different countries, Egypt stands out as significantly small number of them cook before iftar.

Praying



19%

Using the internet

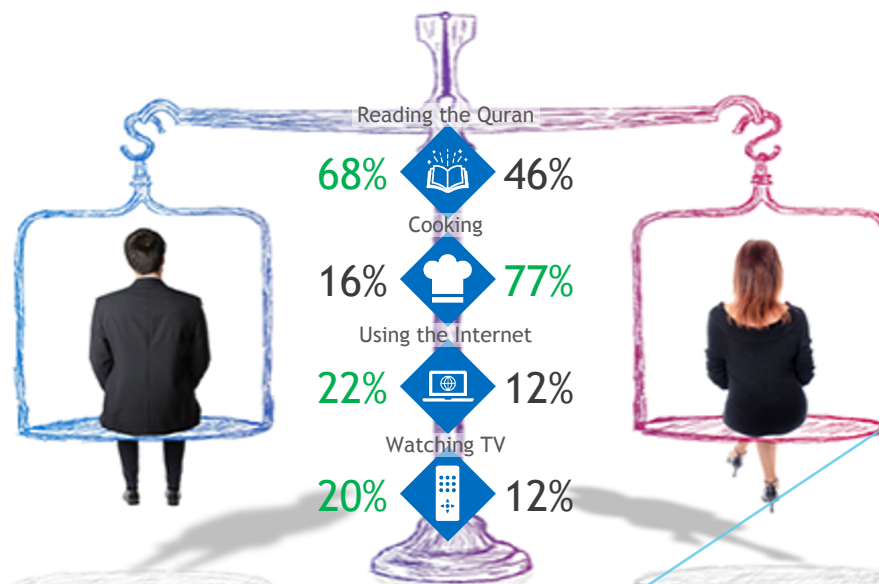


18%

Watching television



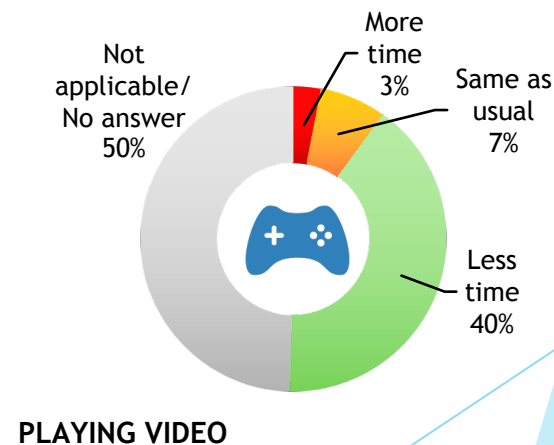
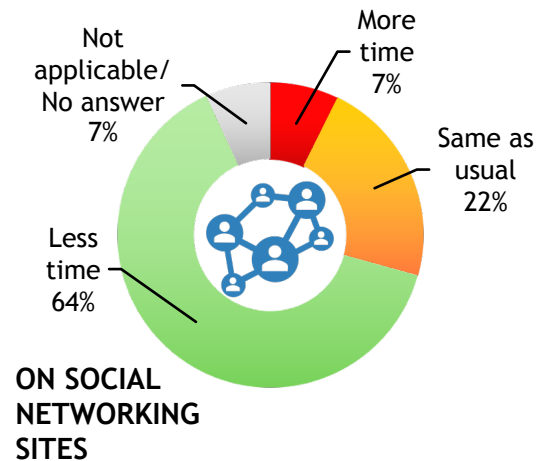
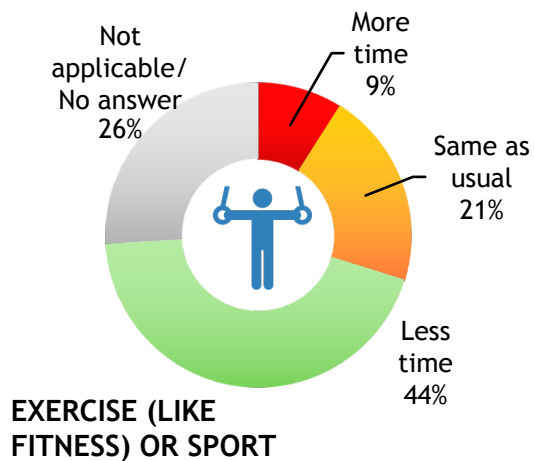
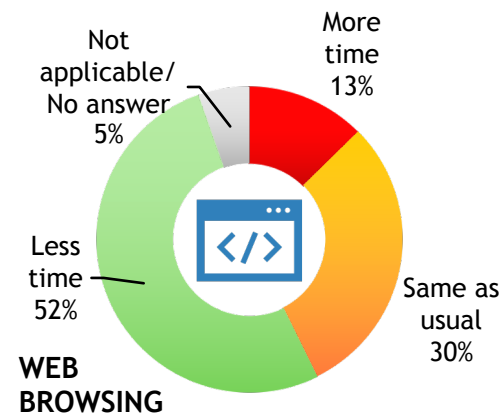
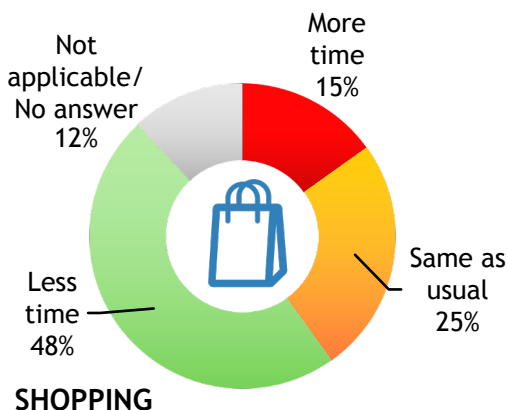
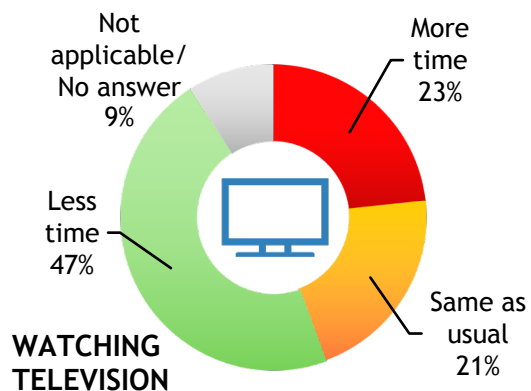
17%



Most of the significant differences can be seen between the sexes. While women busy themselves cooking for Iftar, a significant number of men tend to use their time reading the Quran, use the internet, and watch television.

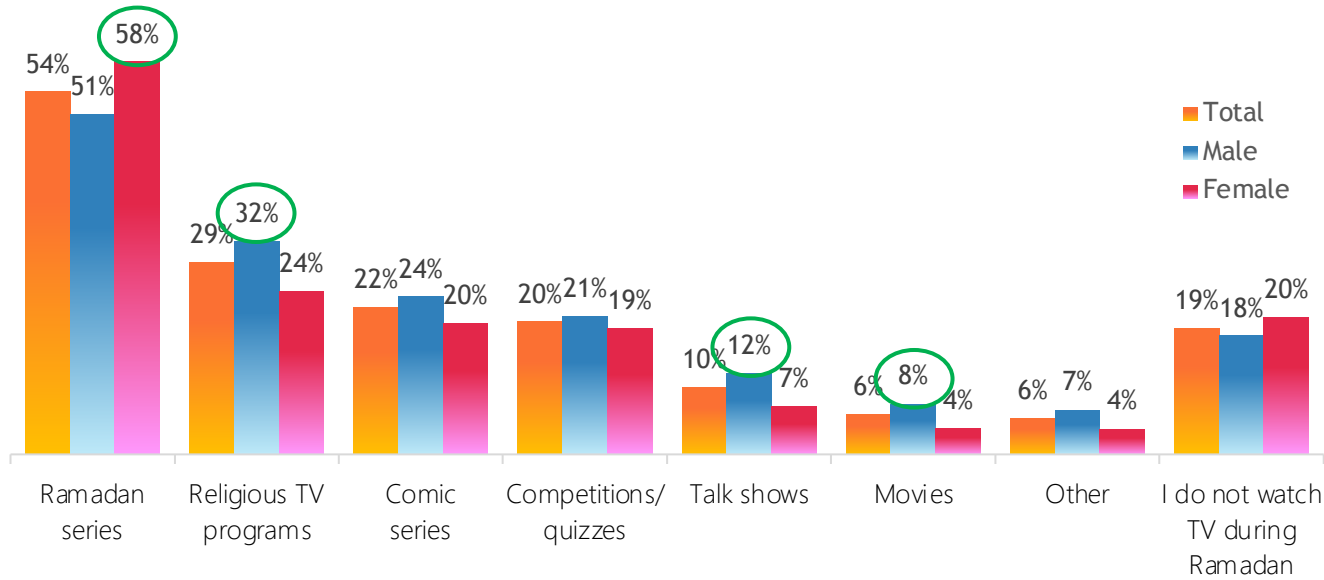


# Doing more or less of activities



Although majority will lessen the time spent on regular activities like web browsing and social networking sites, there are still a hefty number of consumers who will add more screen time, most especially on Television (23%).

# TV Programs



Ramadan series pulls the biggest chunk of the pie (54%) most especially on women as almost 6 out of 10 prefer watching them.

On the other hand, men have a plethora of choice like religious TV programs, talk shows, and movies

Countries show preference for locally produced movies/series/shows. In Egypt, almost everyone (99%) watch Egyptian programs. In Saudi Arabia, 63% prefers Khaliji programs.



71%  
EGYPTIAN



34%  
SYRIAN



34%  
KHALIJI



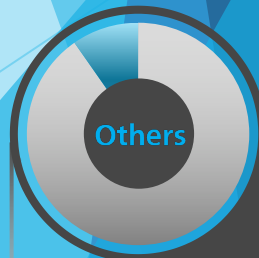
14%  
LEBANESE



9%  
TURKISH



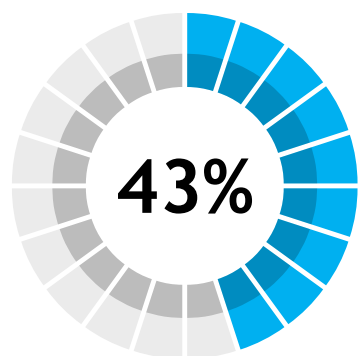
4%  
INDIAN



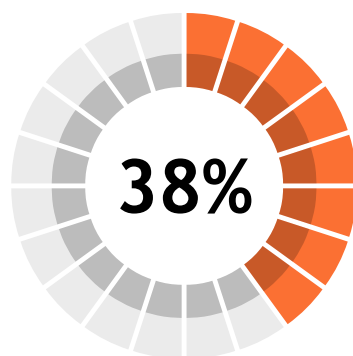
10%  
OTHERS

# Online interests during Ramadan

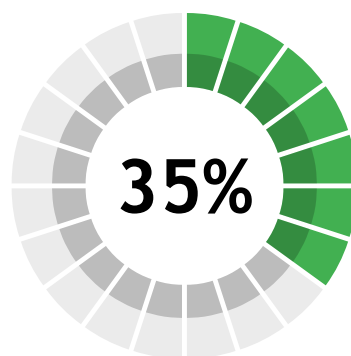
When online, consumers tend to look more for contents that is related to religious Islamic topics / Ramadan topics (43%) followed by food/cooking contents (38%). On average, consumers during Ramadan browses over **3 contents**.



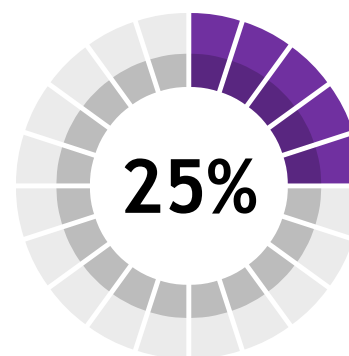
Religious Islamic topics/  
Ramadan topics



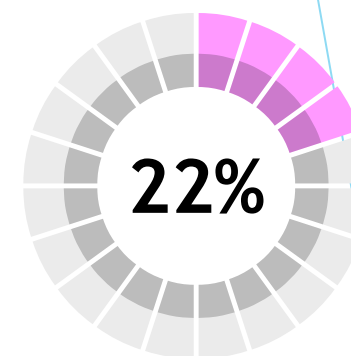
Food/cooking



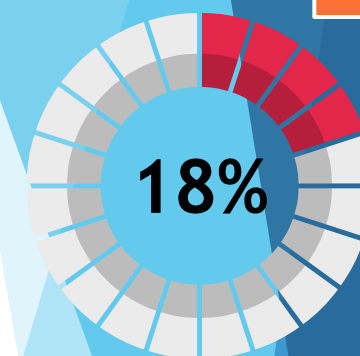
News



Entertainment



Health & fitness



Sport



Preference between sexes is apparent regarding their choices of content. For women, food/cooking content is significantly higher (63%) than men (20%), also with health & fitness content (25% vs 20%).

The choice of content for men is on News (44% vs 24%) and on Sports (27% vs 5%).



Looking at the UAE market, significantly large number of consumers have preference for food/cooking (48%) compared to other countries in the region. News content preference is high in Saudi Arabia (47%).

Note that when it comes to health and fitness content, Saudi Arabia and the UAE has the highest consumption, 30% and 28% respectively. While Egypt has the lowest at 15%.

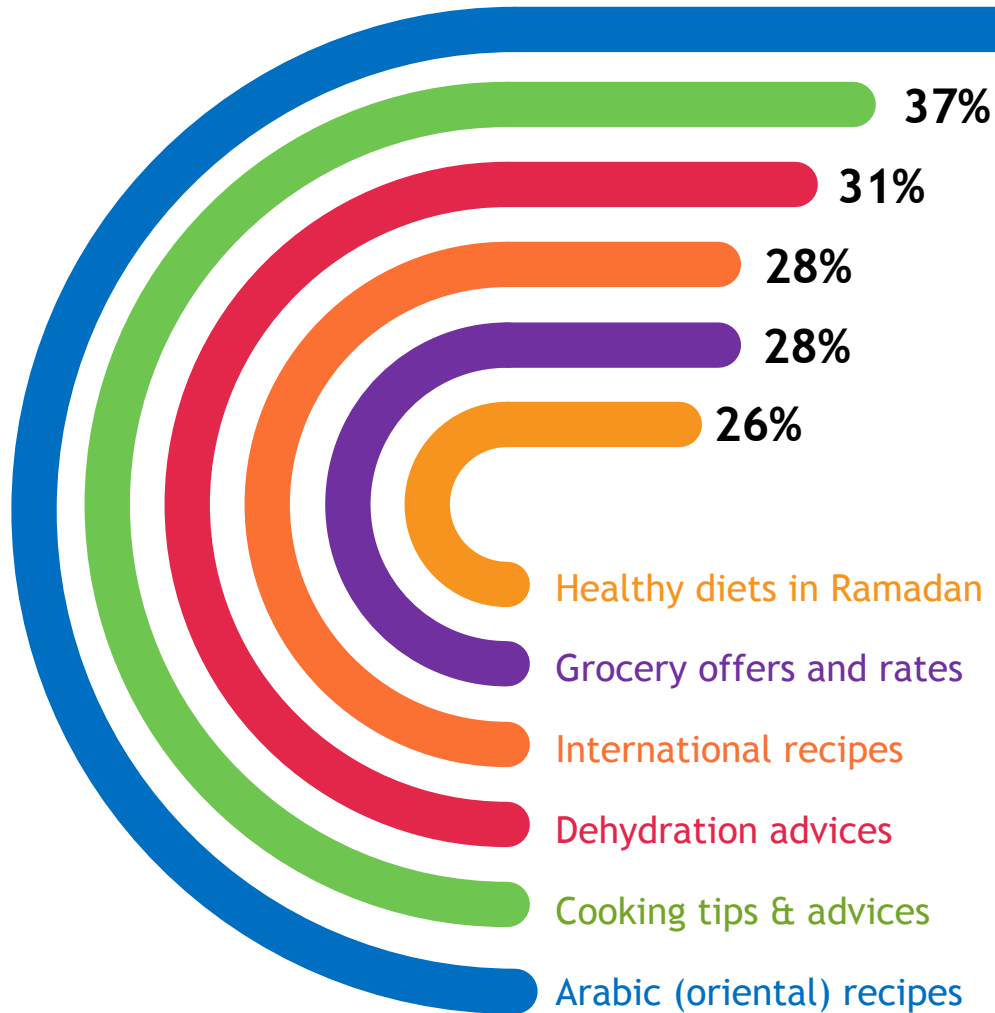


Entertainment content is preferred by 26-35 age group (32%).

Older age groups, 36-45 and more than 45 years, have higher interest in watching News content at 38% and 43% respectively.

Sports content entices more of the 36-45 years age group (23%).

# Preferred food/cooking content online



A third of consumers who are interested to see more “food/cooking” content online looks for Arabic (oriental) recipes. Far behind is cooking tips & advices (37%) and dehydration advices (31%).



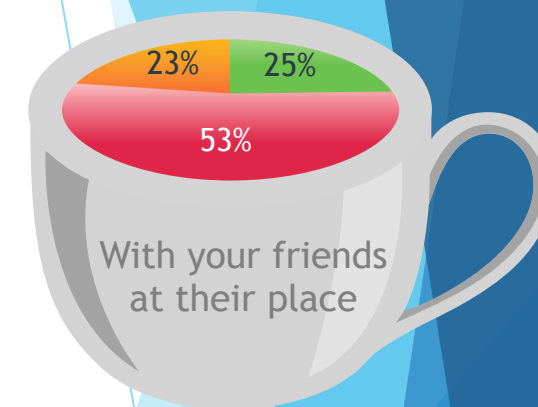
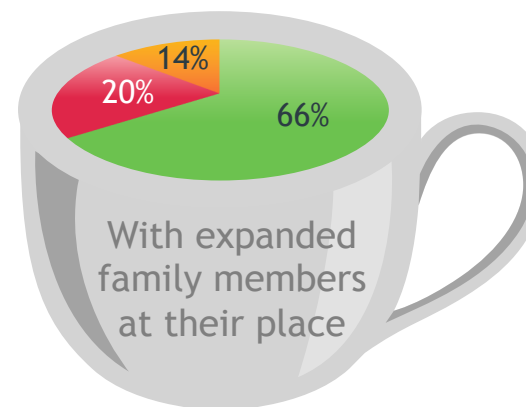
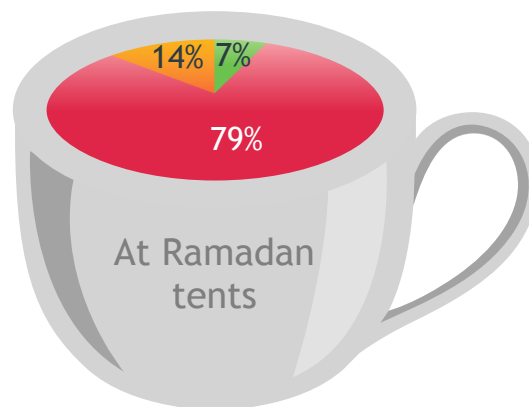
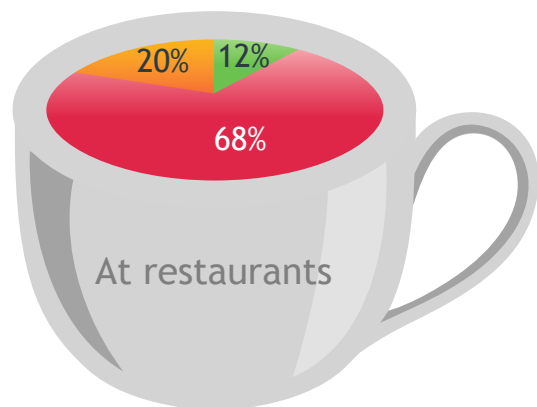
Surprisingly, men seems to be more price conscious as 48% of those who likes “food/cooking” content looks for grocery offer and rates.



# Places for Iftar

In the old norm, Iftar is done with family, friends and the community, reinforcing the ties that bind them all. But in this new norm where physical distancing is enforced, sharing Iftar is done with close family only at the convenience of their place (66%). Going to public places such as restaurants and Ramadan tents is not an option to 68% and 79% of consumers, respectively.

■ Yes  
■ No  
■ Not sure



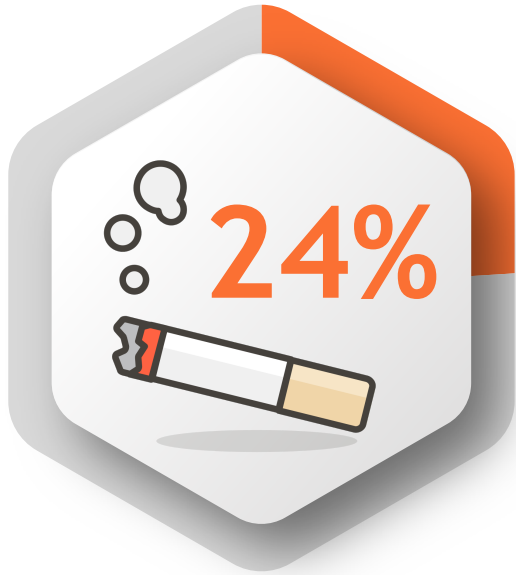
Going out for Iftar is something men really wanted to do compared to women.



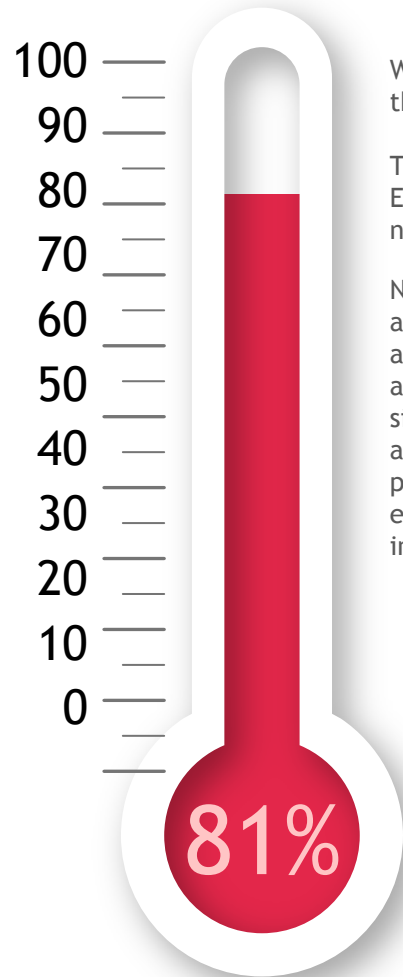
Older age group (more than 45 years) strongly opposes going out for Iftar.

# To smoke or not to smoke?

Almost a quarter of consumers claim that they do smoke. Looking at the sexes, a bit more than a third of men say they smoke compared to only a tenth of women.



# Handling COVID-19 pandemic

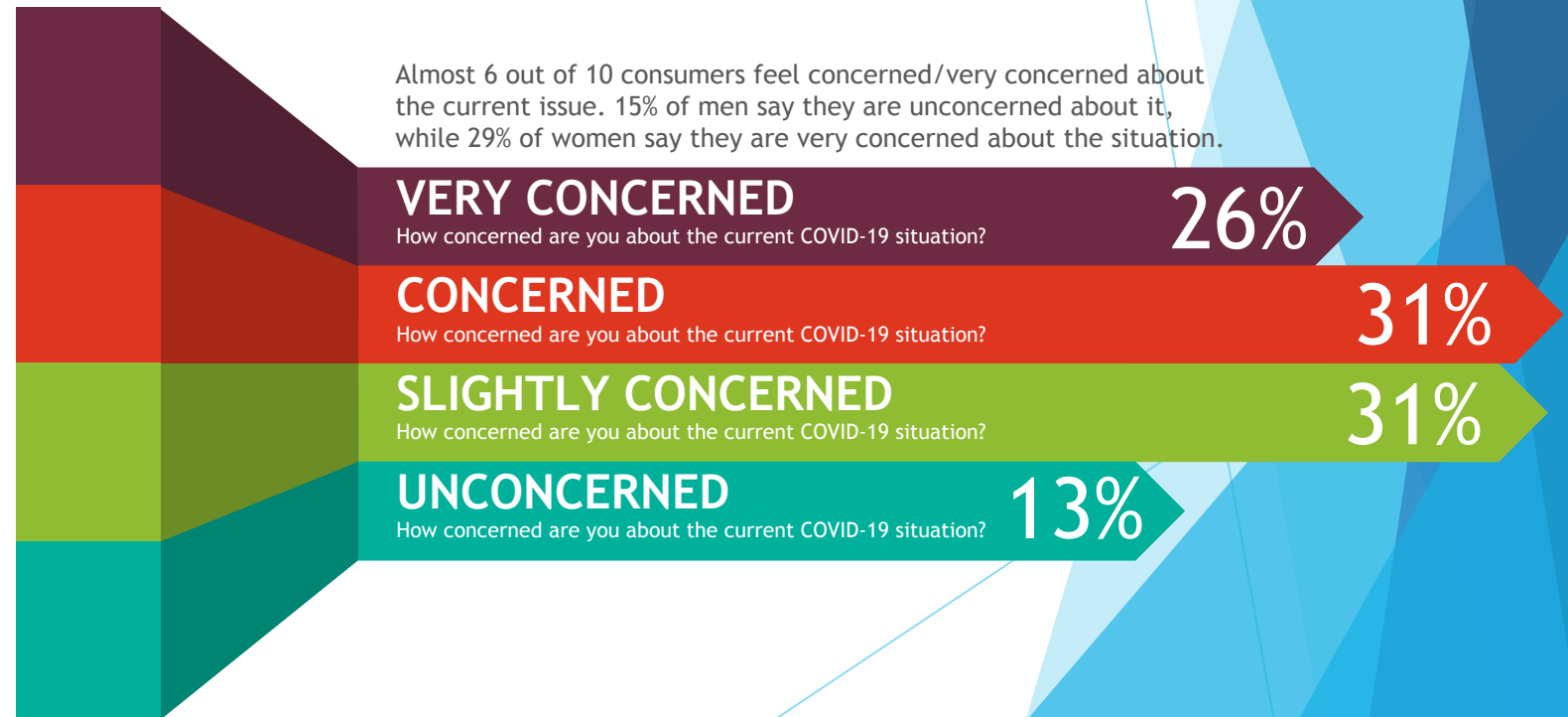


When asked how seriously consumers take the current COVID-19, 8 out of 10 of them claim they take the issue **very seriously**.

This is evident most especially in the UAE as a whopping 93% profess to feel the same. Egypt, on the other hand, has a significant number of consumers (23%) saying that they do not take the current situation seriously.

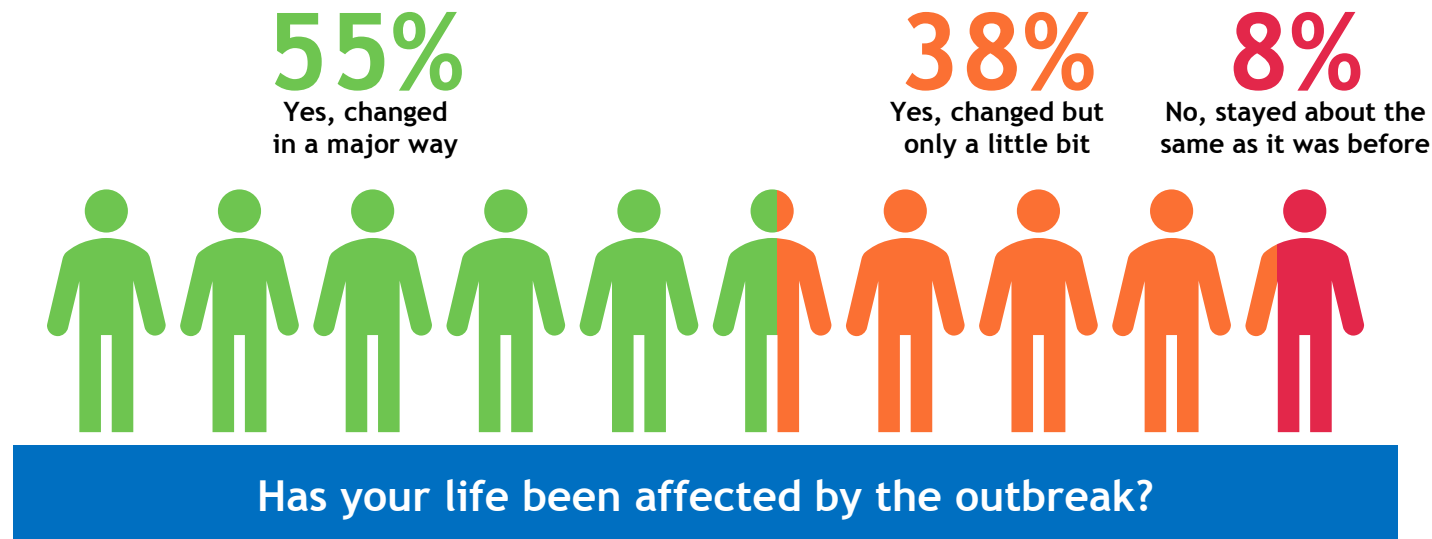
Not so surprisingly, older age groups (36-45 years and more than 45 years) are the ones who take the situation seriously as they are the ones who are prone to get adverse effects once they get infected of it.

Almost 6 out of 10 consumers feel concerned/very concerned about the current issue. 15% of men say they are unconcerned about it, while 29% of women say they are very concerned about the situation.



# Direct effect of COVID-19 on household

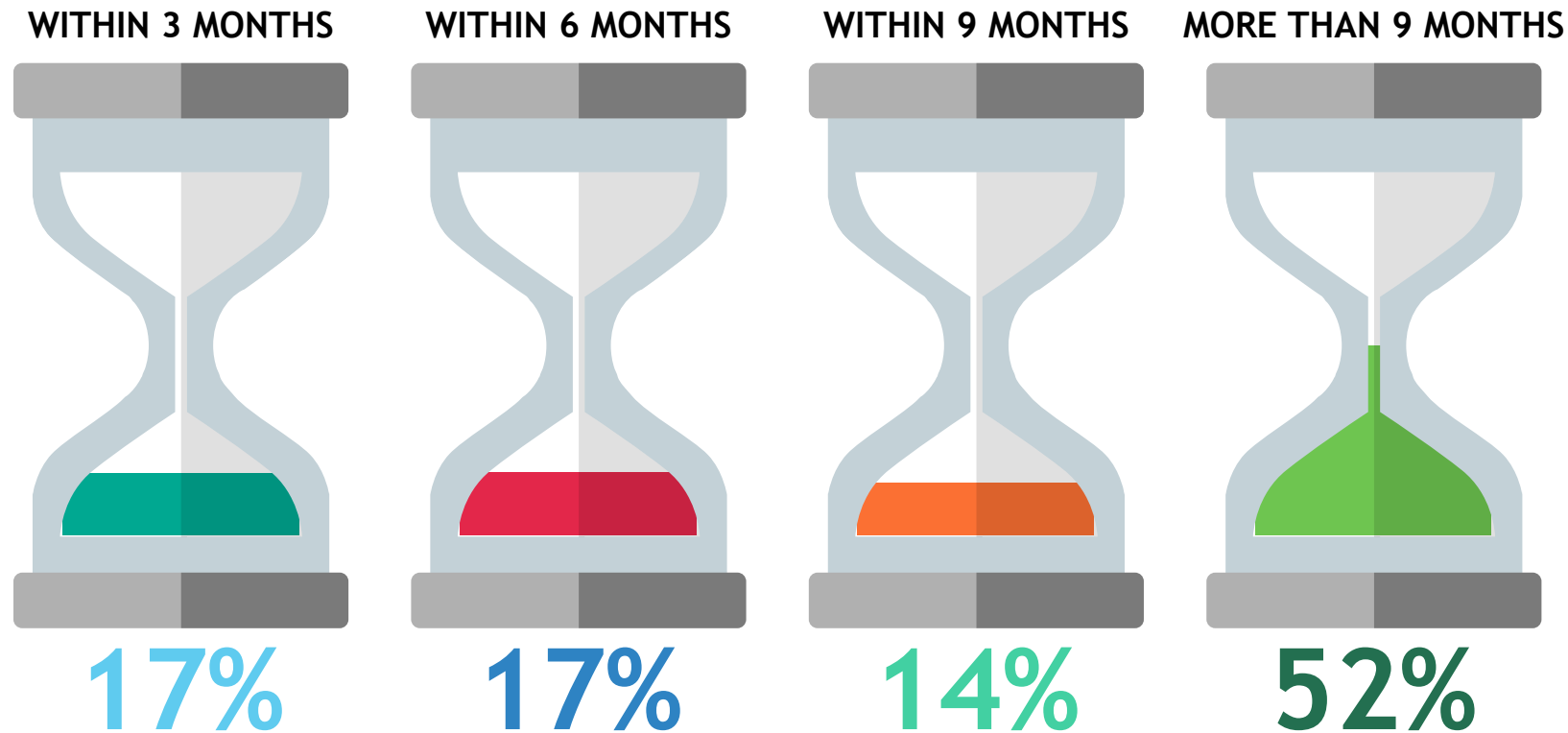
It's no surprise that almost everyone (92%) of the consumers have been directly affected, in a major way or only a little bit, by the pandemic. Only a few (8%) are lucky enough and not experience the negative effect brought by the pandemic.





# When will the outbreak end?

The consumers are divided almost half-and-half on when this outbreak will end. Forty-eight percent are optimistic saying it will end this year (within 9 months or less) while the rest (52%) are pessimistic saying it will take longer time before this situation ends. Older people (57%) are more pessimistic that the other age groups saying it will take more than 9 months to end this pandemic.



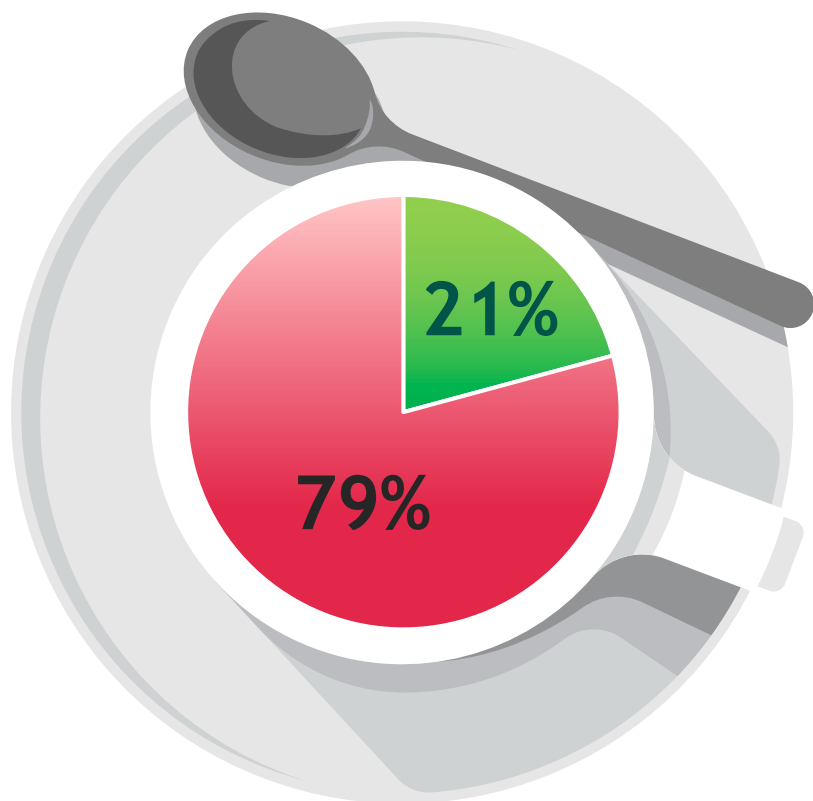
# Ramadan during the COVID-19 situation

Consumers tend to stay positive given the current situation. When asked whether Ramadan will be different this year, majority still say that it will be different but in a positive way (44%). Significant number of men (24%) and older age group (more than 45 years - 24%) are on the negative side saying Ramadan will be different in a negative way.

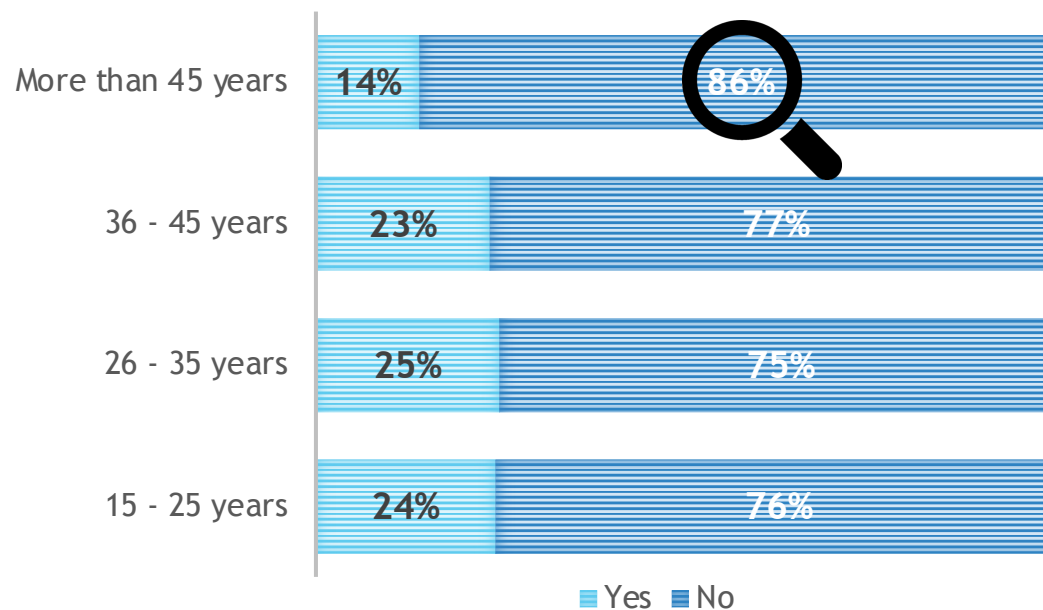


# Eating out and social gathering

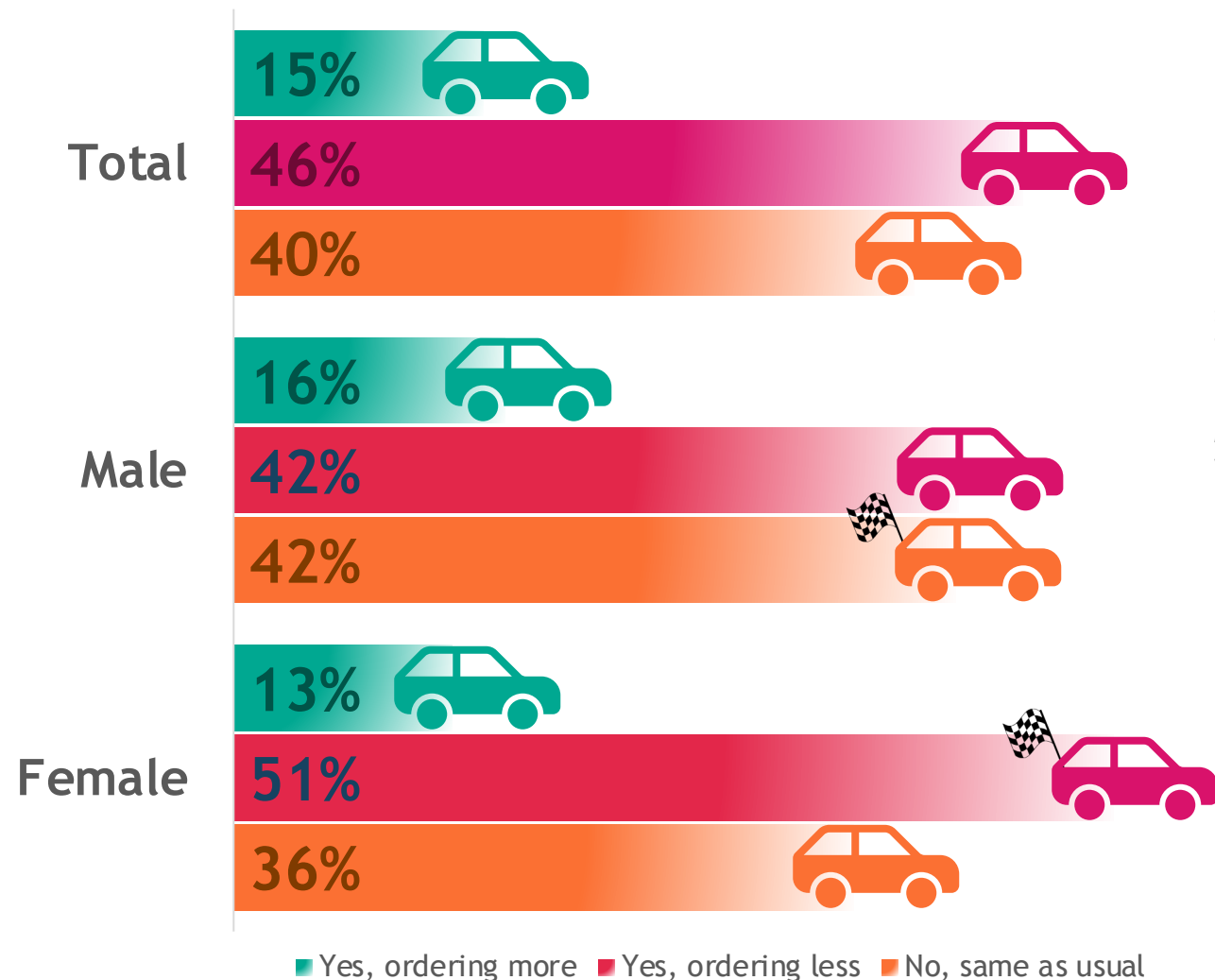
The idea of eating out in a restaurant or attending social gatherings still makes the consumers feel uncomfortable (79%) more so for older consumers (more than 45 years - 86%).



 Yes  No



# Changes in food delivery service



Due to contamination and infection scares, sure enough, consumers (46%) order less from food delivery service. This behavior is more apparent with women (51%).

Men seems to be unaffected and say they will use the service same as usual (42%)



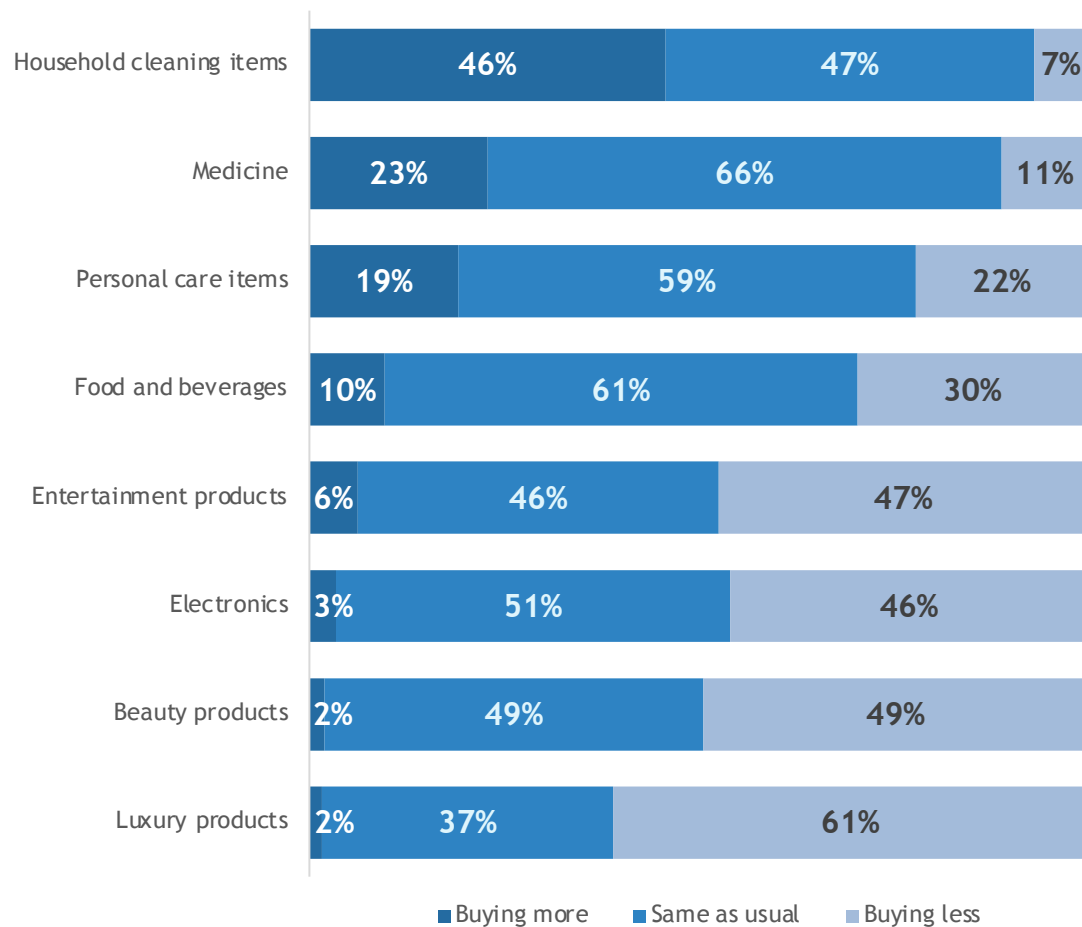
# In-store trips vs. online purchase

Going out seems to be a burden nowadays but people still need to go to buy their essentials. Good thing technology is here to replace in-store trips. That is why, a bit more than a half (51%) consider replacing in-store trips with online purchases.

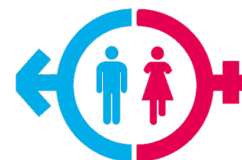


Because of the wide choices of online platforms for online purchase, consumers in Saudi Arabia and the UAE markets tend to go for online purchase, 64% and 57% respectively.

# Impact on shopping behavior



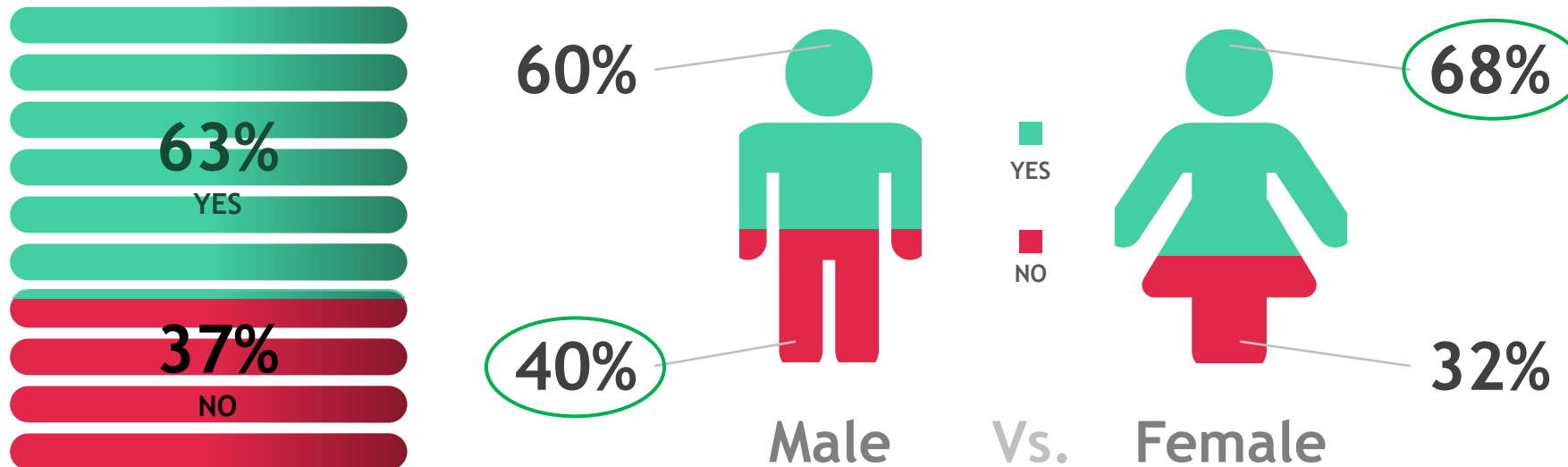
Shopping carts will look different due to COVID-19. A lot of consumers now consider buying more household cleaning items (46%) and medicine (19%) and less of luxury products (61%). Almost half of the consumers will buy less of beauty products, electronics, and entertainment products. Budgets are now redirected to essentials and protection.



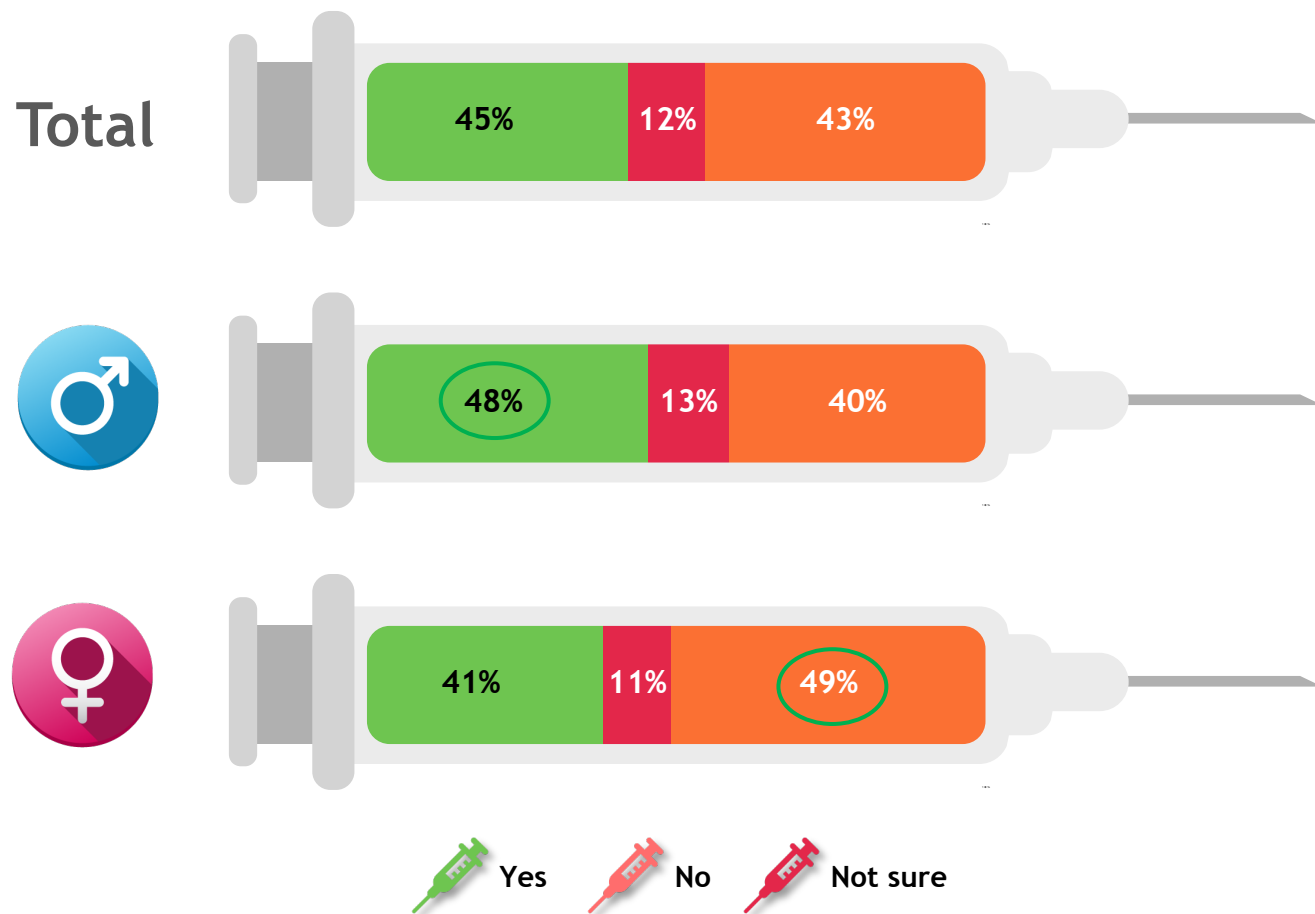
When comparing the shopping behavior of men and women, data shows that women tend to buy more than men. Among the list of things that women want to buy more are household cleaning material (49%), personal care items (22%), food and beverage (13%), and electronics (5%).

# Perception on setting up restrictions

Governments around the world has been putting up restrictions to prevent the spread of the disease. Consumers believe that putting up more restrictions is required (63%) hinder further spread of the virus. The same thought is shared by women, as 68% of them believe in the favorable outcome of putting up more of these restrictions. Men think otherwise (40%).



# The power of the vaccine



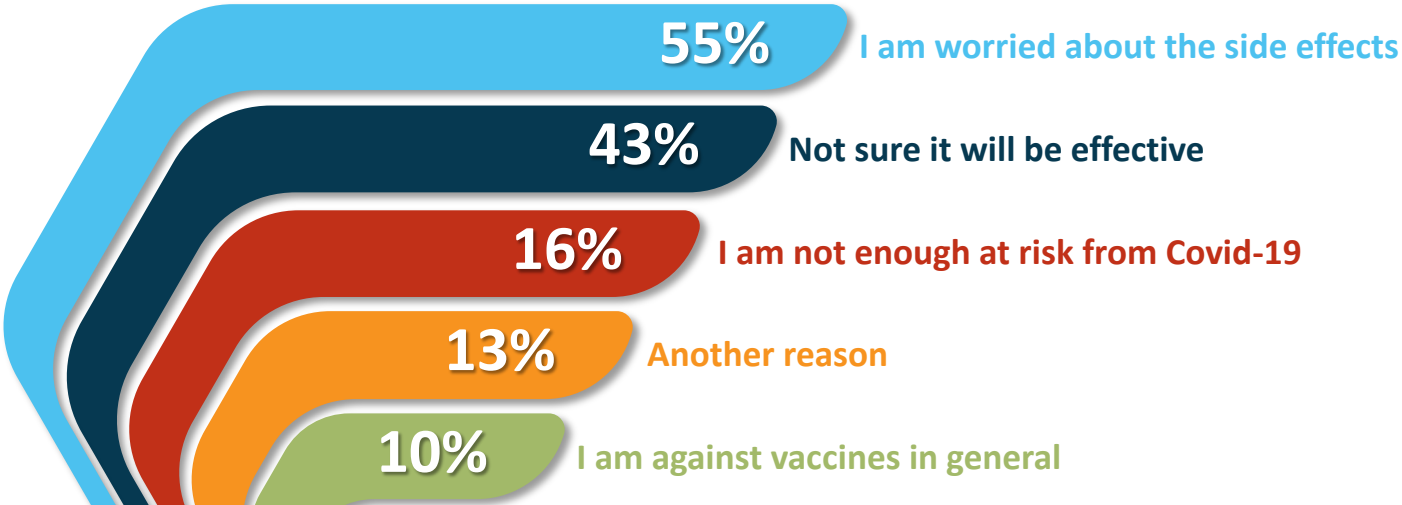
Vaccines are now distributed around the world, but will it be able to slow/stop the spread of the virus? According to 45% of consumers, the vaccine will be able to do it. Men also think positive (48%) and vouch for the effectiveness of these vaccines. Women (49%) are still unsure of its efficacy.



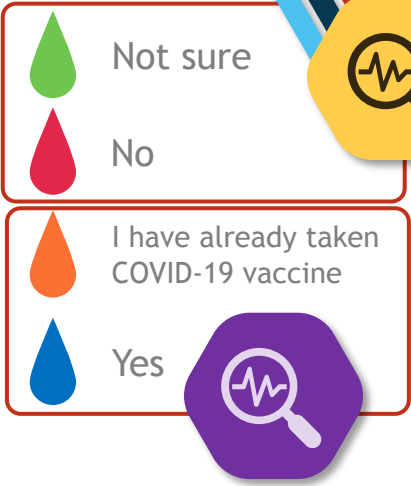
A lot of consumers are planning to or already took the jab (58%), the rest are either undecided or not willing to take it.

Men tend to go for it (62%) than women (52%).

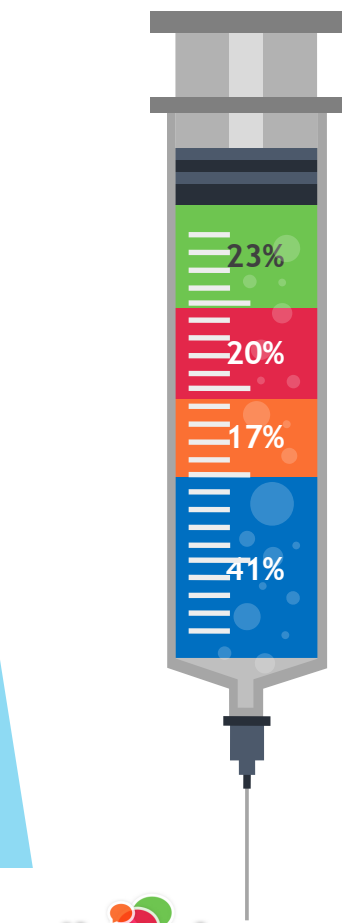
Consumers in Saudi Arabia and the UAE say that they have taken the vaccine already (32% and 44%)



The 2 biggest reasons why consumers are not willing to get the jab are the worries about the side effects (55%) and the efficacy of the vaccine (43%).



Media plays a vital role in the information dissemination regarding the vaccine. Almost a quarter plans or have taken the vaccine because of what they saw/hear in the media.





THANK YOU