

MOMENTS OF INFLUENCE

Connecting with the Modern Consumer's
Ramadan Rhythm



BUILDING ON 2025

Ramadan is the highest-stakes period for brands. It is a time of immense opportunity, but also intense pressure: advertisers spend an estimated 20% of their yearly budgets in the holy month, leading to cluttered environments where 76% of consumers feel they see too many ads (Ipsos MENA). The mandate for every brand remains clear: stand out, authentically connect, and deliver measurable results.

How should brands navigate this period?

In 2025, we defined the recipe for success through our 4Cs:

CREATE

Create captivating ads, particularly leveraging creators for authentic discovery and action.

CONNECT

Connect seamlessly across the digital ecosystem, being present regardless of channel or device.

CONTACT

Contact users with high frequency to drive consideration and conversion.

CONVERT

Convert and deliver business impact, tying media investment directly to measurable outcomes across all three layers.

THREE LAYERS OF OUTCOMES



1. *Brand-led outcomes*, indicating long-term brand health across metrics such as mental availability (salience), favourability and purchase intent

2. *Conversion-led outcomes*, serving as inputs for the business to nurture into actual customers. This includes website visits, in-app actions and (qualified) leads

3. *Business outcomes*, directly tied to new customer acquisition, revenue or profitability



Mastering these four aspects of the marketing cycle - **Create** (Creative), **Connect** (Media/Platform), **Contact** (Frequency), and **Convert** (Business Impact) - delivered phenomenal success for some of our clients during Ramadan last year:

- ↗ Doubling the reach of an organic post - **from 5 million to 10 million views** in just a few hours - for a leading Saudi bank
- ↗ Helping a global ecommerce platform reach **37%** of their UAE annual channel-specific sales target and an even more impressive **74%** of their KSA target, all in just one month.
- ↗ **40% higher-than-benchmark CTR** and engagement rates for a confectionery brand with stringent brand safety and suitability requirements.
- ↗ Guaranteed online orders and over **16K** in-app coupon redemptions for a global QSR chain.
- ↗ **8X** restaurant bookings for a key Saudi destination in a span of just 19 days.

These winning examples drove what we call Marketing Performance. Purposeful partnerships, particularly with creators. Campaigns that prioritised outcomes over exposure. And a deep understanding of local culture during one of the most meaningful times of the year.

2X Views

74% Of Annual Target

8X Restaurant Bookings

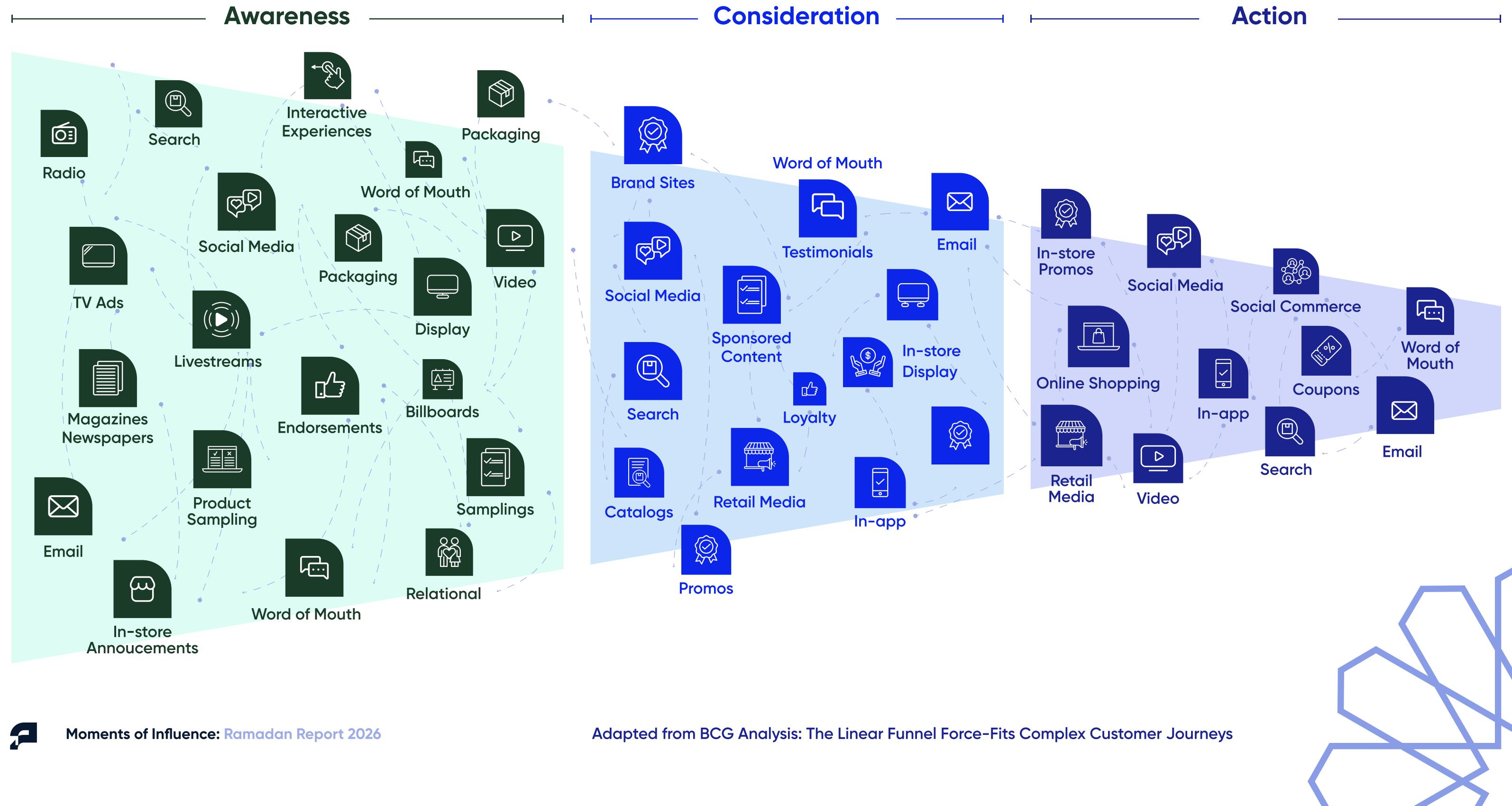


INTRODUCING THE 4S FRAMEWORK

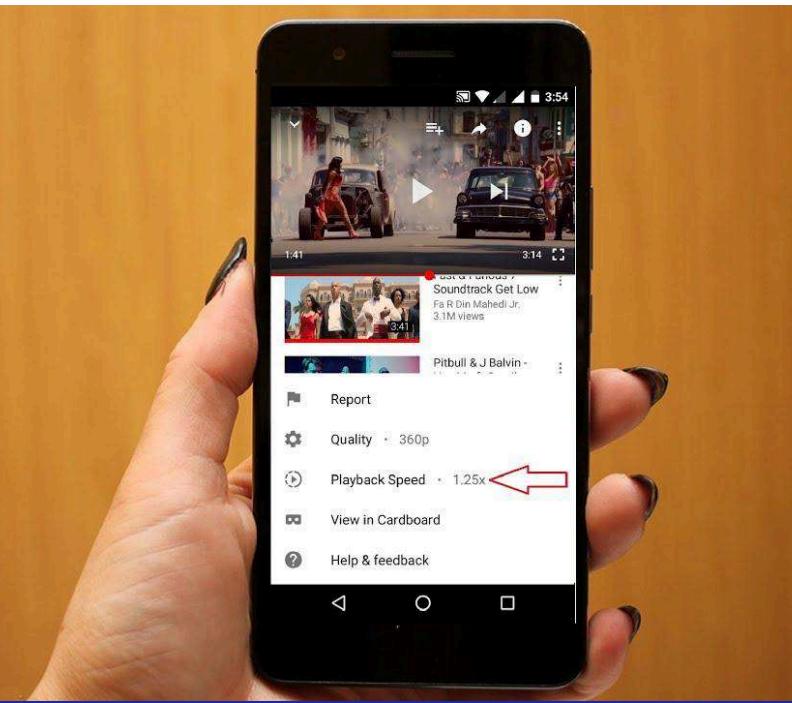
Recent research by BCG and Google confirms that the customer journey is now more fragmented and non-linear than ever. The traditional funnel—from awareness to consideration to purchase—fails to capture the fluid, multi-touchpoint way people engage with brands today, a behaviour that is particularly amplified during Ramadan. It is becoming harder, not easier, for advertisers to Create, Connect, Contact, and Convert their customers if they rely on outdated linear models.

The complexity of today's path to purchase cannot be overstated. High-value transactions, for instance, are rarely quick, requiring an average of 34.88 touchpoints before a purchase is made, vastly different from the 6.89 touches typical for low-value transactions (Focus Digital). This stark difference reinforces that the journey is not a fixed highway but a highly variable, individualized map. Furthermore, as many as 68% of MENA internet users are not strictly loyal to brands (GWI 2025), highlighting a high potential for brand switching or addition of a competitor mid-journey, further underlining that the funnel is porous. So whilst the recipe for success (the 4Cs) remains unchanged, the kitchen has been entirely redesigned.



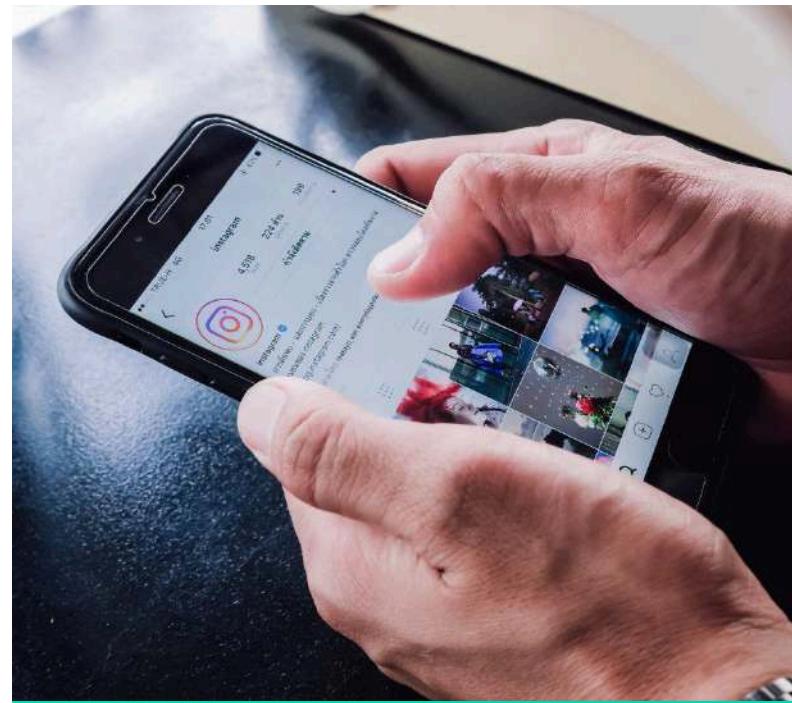


To master the 4Cs in this non-linear environment, we introduce the **4S Framework**, as pioneered by BCG. The 4S explains where and how influence truly happens by identifying the four core digital behaviours consumers move dynamically across:



01 STREAMING

Continuous, personalized content consumption across platforms such as YouTube, connected TV, and podcasts.



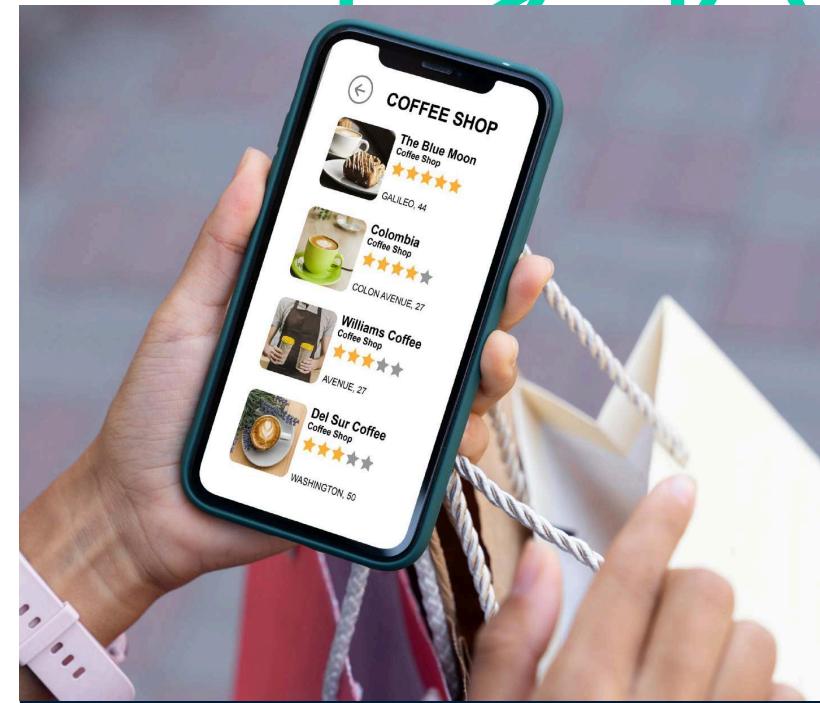
02 SCROLLING

Discovery-driven browsing through social feeds, communities, and recommendation engines.



03 SEARCHING

Multimodal, often AI-assisted exploration of information and intent-driven queries.



04 SHOPPING

Seamless transaction experiences spanning multiple devices and platforms.

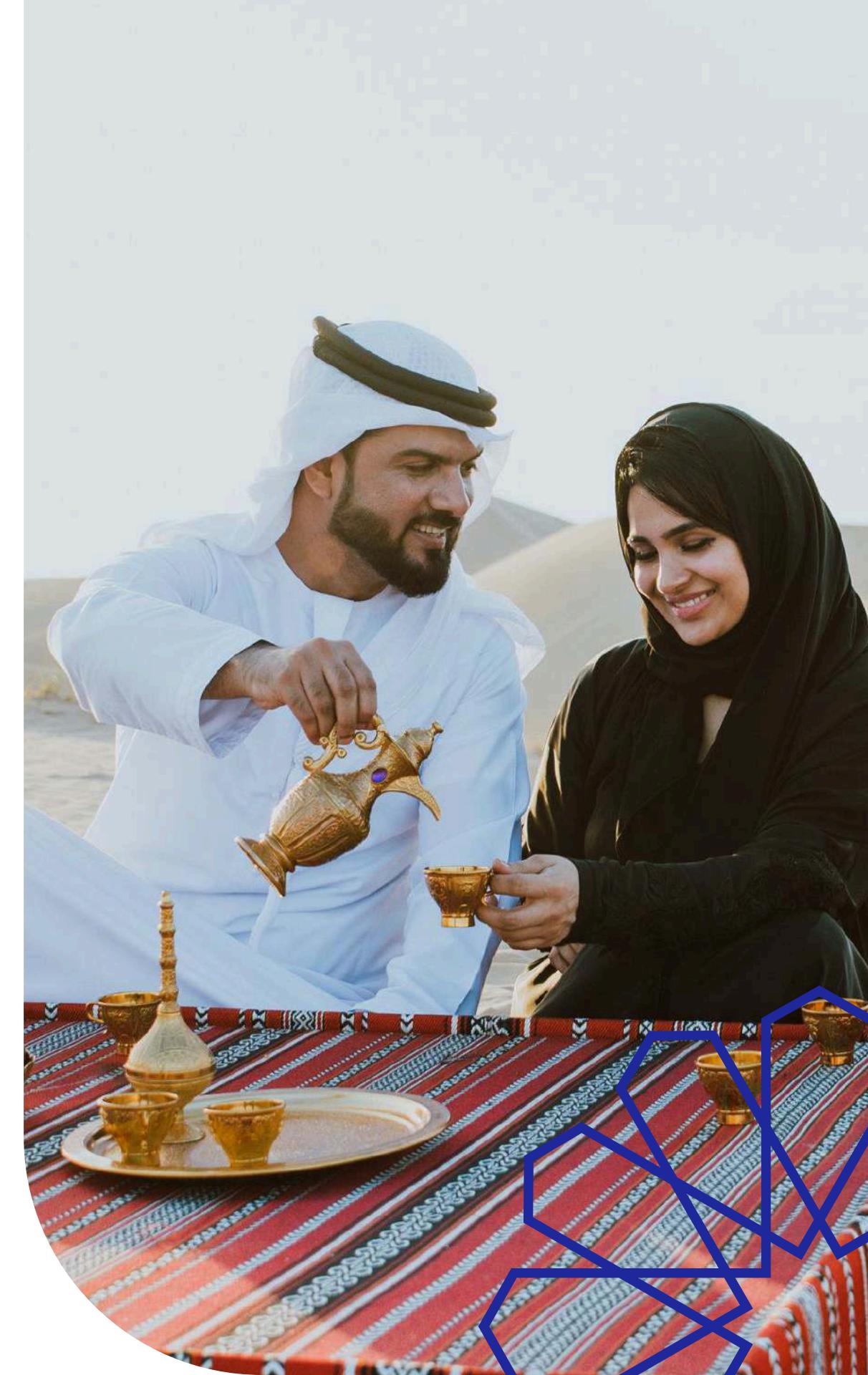
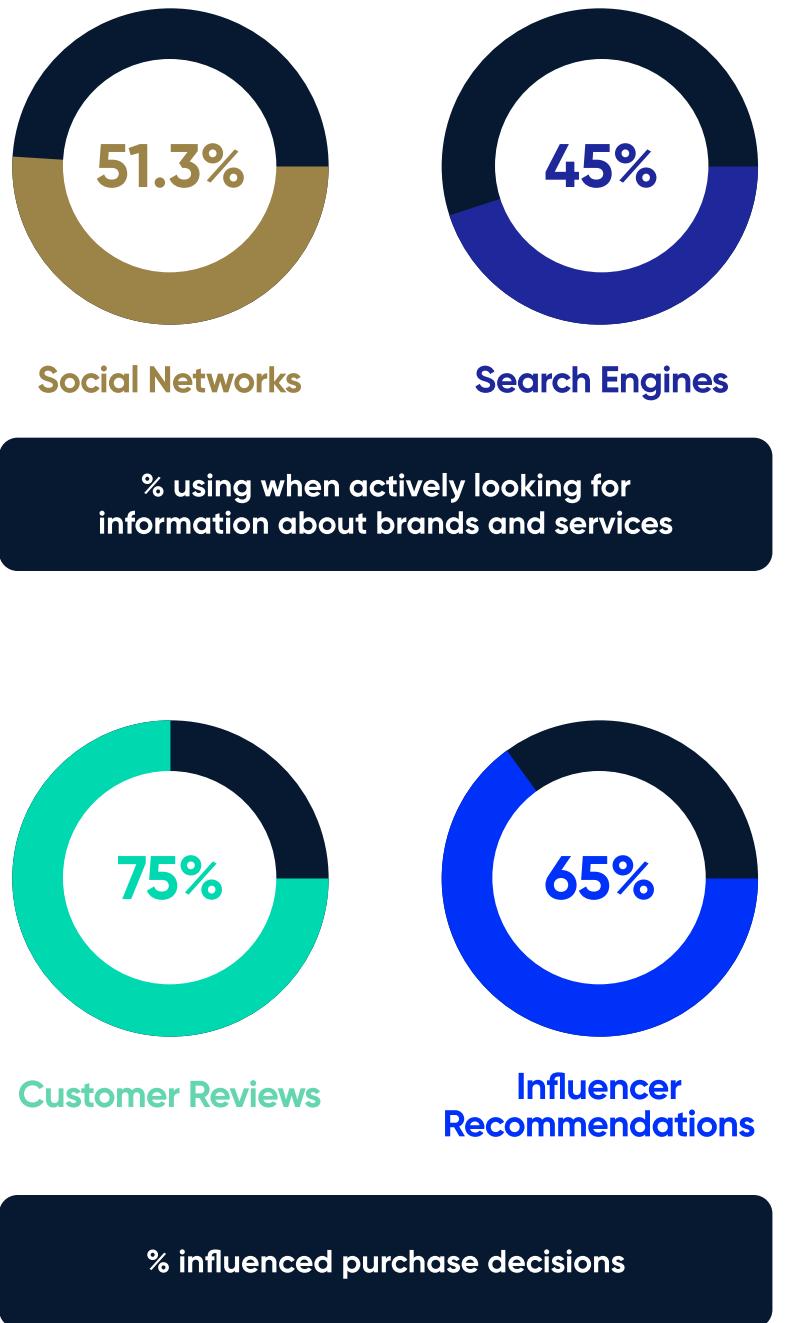


As consumers do things in the digital space, they can be influenced by a particular medium to take action, for instance purchasing something. The real insight from the 4S Framework is that this path to conversion is not straightforward.

Rather than progressing step by step through a funnel, consumers now follow **Influence Pathways**, jumping between the 4S behaviours as triggers arise. This fluid behaviour is supported by the fact that **51.3%** of consumers use social networks and **45.3%** use search engines (GWI) as sources when actively looking for information about brands and services.

Crucially, the growth of consumer-driven touchpoints means that **75%** of users say customer reviews influence their purchase decisions, and **65%** have made purchases based on social media influencer recommendations. This shifts the focus away from brand push-messaging toward authentic influence within the 4S environment.

This framework captures how people make decisions today: dynamically, emotionally, and across multiple touchpoints simultaneously. During Ramadan, these behaviours become particularly pronounced, as cultural rituals, time-sensitive offers, and shared experiences amplify engagement across all four dimensions.

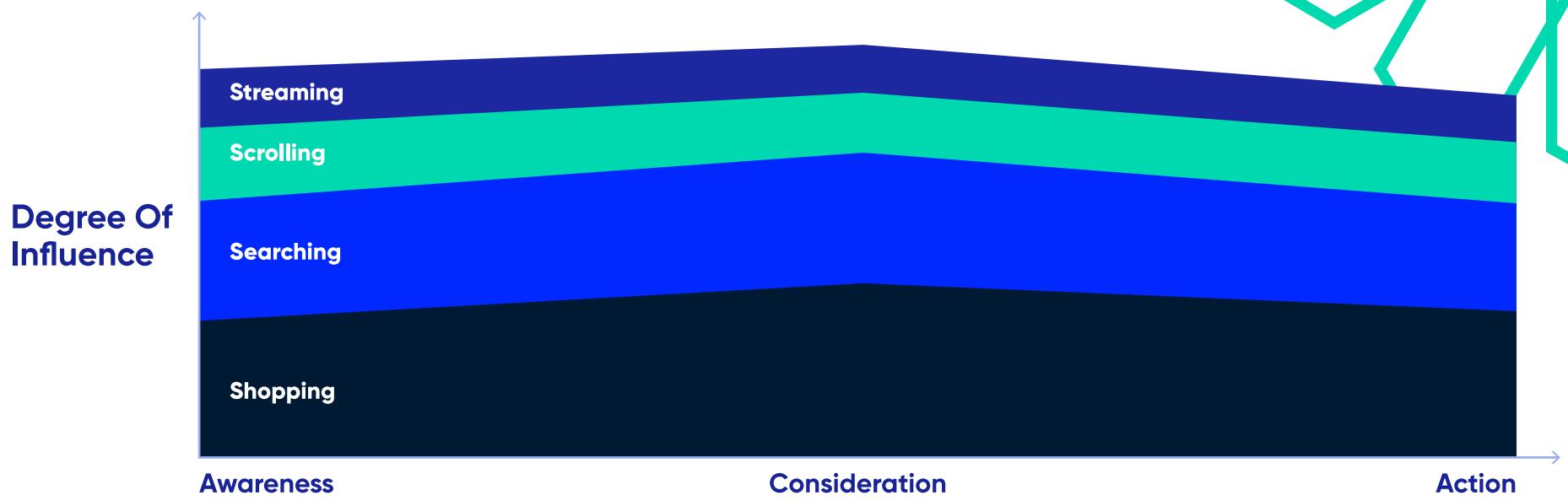


The best way to visualise these four behaviours is through **influence maps**. Unlike traditional funnel models, which plot the number of consumers at each stage against the progression of their journey, influence maps replace this aggregate view with a focus on the **degree of influence**, the extent to which an advertiser can meaningfully affect consumer decisions at any given moment. This approach captures not only the individuality of consumer journeys – supported by the fact that 67% of consumers in the Middle East and Africa reported discovering new brands via social media before purchase (PwC) – but also their complexity.

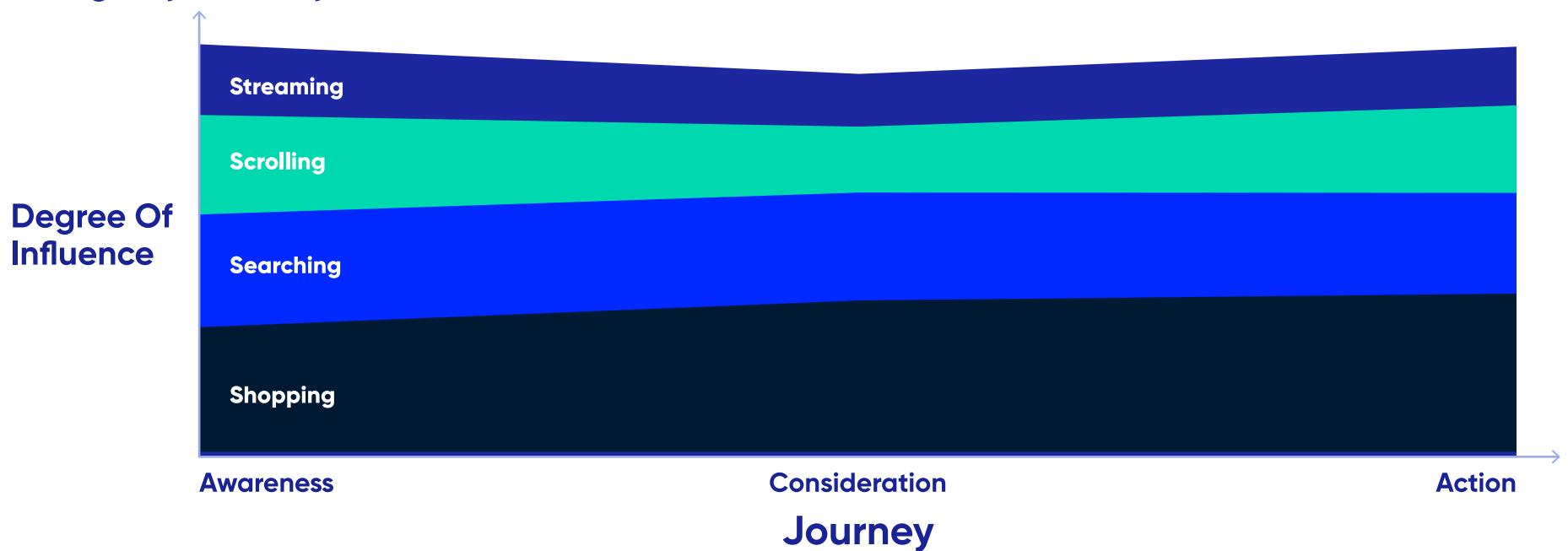
This complexity is underlined by the fact that individuals often engage in multiple overlapping "customer journeys" simultaneously (e.g., grocery for Ramadan, clothing gifts, electronics for home), reinforcing the idea that a single funnel view is naive. Furthermore, the customer journey is cyclical and dynamic rather than terminal, as evidenced by the 26% of the audience who use loyalty/reward programs (GWI), challenging the idea that the funnel concludes at "purchase".

Influence Maps for selected consumer influence pathways

Find The Best Product



Indulge My Curiosity



During the holy month, consumers jump fluidly between streaming, scrolling, searching, and shopping.

For example:

- ↗ People may shop impulsively at night after breaking fast.
- ↗ They might scroll TikTok, discover a promo, and convert immediately.
- ↗ Searching for recipes can quickly lead to adding products to their basket.
- ↗ Watching YouTube content may prompt a click on an FMCG offer.

These behaviours illustrate that brands cannot rely on linear funnel thinking—from awareness to consideration to purchase. Instead, marketing strategies should be designed around influence, understanding when and how each touchpoint can nudge the consumer toward action, whether linearly or non-linearly.



THE 4S IN ACTION: APPLYING THE FRAMEWORK FOR 2026 RAMADAN SUCCESS

The shift from the linear funnel to the **4S Framework** changes how advertisers must approach Ramadan. The **4S** (Streaming, Scrolling, Searching, Shopping) provides the precise lens required to map the non-linear "influence pathways" and ensure every media, creative, and targeting choice maximizes the degree of influence. Ramadan acts as a magnifying glass, amplifying all four digital behaviours, moving them into compressed, high-stakes time windows. It's a period that demands advertisers adapt to its unique rhythm to ensure the success of their 4Cs strategy.

The rhythm of Ramadan—fasting during the day and community gatherings at night—disrupts the daily schedule, condensing media consumption and shopping habits into new, highly valuable time windows. Technology is not replacing tradition but is viewed as an integral part of the month by 76% of Middle Eastern consumers, according to research by The Trade Desk, PA Consulting, and Brainsights. This cultural integration is what fuels the intensification of the 4S behaviours.



01 STREAMING

High-Attention, High-Family Viewing

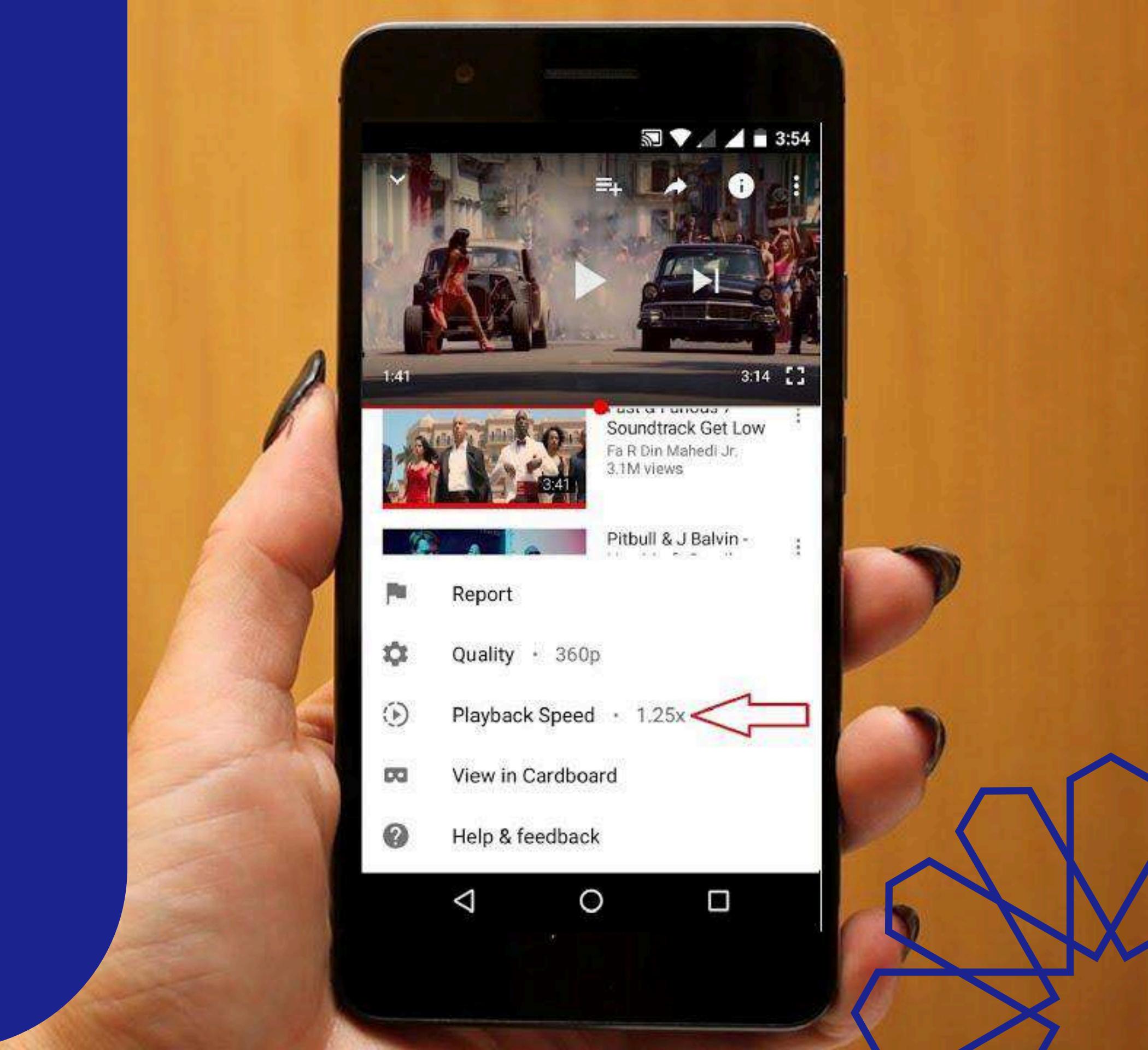
Ramadan viewing shifts from individual viewing to a communal, high-attention experience.

How is this Behaviour Intensifying?

Binge-watching behaviour increases for many users, with 39% of KSA residents and 40% of UAE residents confirming an increase in binge late-night Ramadan shows, according to YouGov. For many, the focus shifts to watching more religious or Ramadan-specific shows.

What This Means

Family co-viewing increases dramatically, leading to higher recall and emotional engagement with content. Streaming becomes a powerful influence driver, moving beyond mere reach to build emotional familiarity. This high-attention environment is ideal for long-form, brand-building content.



01 STREAMING

Strategic Implications for Advertisers

↗ Creative and Context:

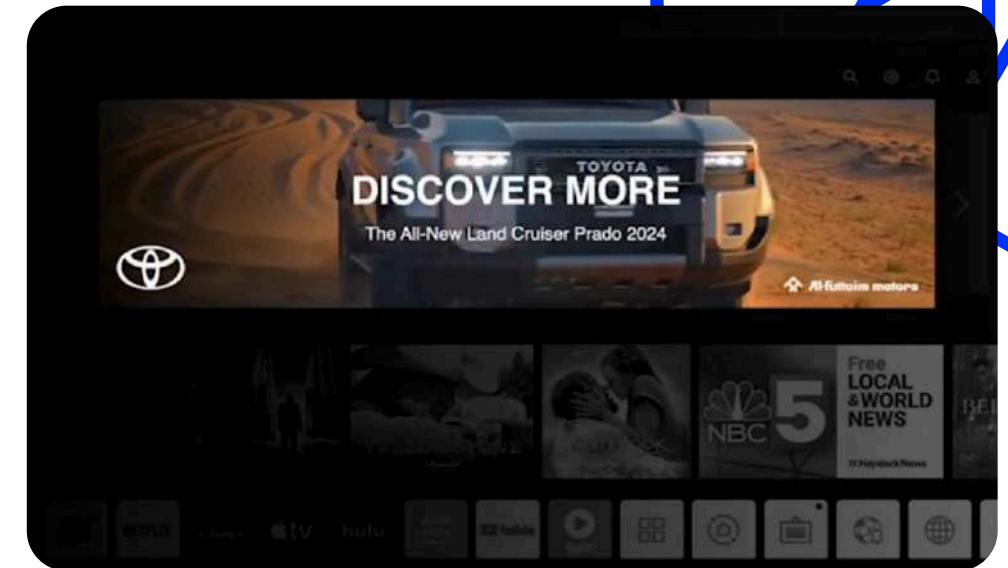
Utilise high-attention CTV and YouTube formats, focusing on rich storytelling and emotional creatives. Leverage **YouTube contextual solutions** to align ads with highly relevant content categories such as food, sports, and spirituality.

↗ Media Strategy:

Secure premium inventory across popular, mood-influencing content using **PMP (Private Marketplace)** and **PG (Programmatic Guaranteed) deals** to ensure visibility during peak viewing hours.

↗ Targeting Focus:

Employ **multi-screen campaigns** (e.g., CTV + Mobile) to capture high-recall moments on the large screen and drive immediate action or re-engagement on the mobile device.



02 SCROLLING

The Reinvented Discovery Engine

Social media transforms from passive browsing into an engine for active discovery & impulse conversion, particularly during the late-night hours.

How is this Behaviour Intensifying?

Social media commerce spikes during the evenings. 61% of both KSA & UAE residents are likely or very likely to shop directly via platforms like Instagram or TikTok during the holy month, according to YouGov. This impulse is driven by peer influence: 25% of KSA residents & 23% of UAE residents cite influencer recommendations as the top driver for social purchases. Furthermore, 20% of KSA residents and 15% of UAE residents cite live shopping events as a top purchase influence.

What This Means

Scrolling shifts from low-intent browsing to a high-intent, discovery-based behaviour. The biggest spike in social browsing occurs between Iftar & Suhoor, where users are highly receptive to emotional & festive creativity that triggers instant action. Creative relevance, driven by creators, outweighs mere platform reach in this period. Recent Meta data suggests that by using creator-led content, advertisers can target more uniques, expanding their reach.

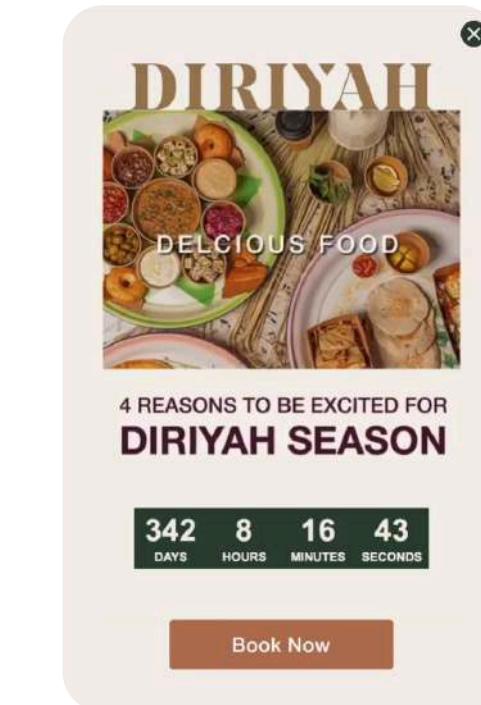


02 SCROLLING

Strategic Implications for Advertisers

↗ Creative and Impact:

Push **high-impact, rich media formats** (e.g., countdowns, interactive carousels) heavily during the post-Iftar and late-night window to deliver a thumb-stopping moment and capitalize on impulse. Enhance speed and scale by leveraging **Generative AI** for rapid creative versioning and customizations.



↗ Media Strategy:

Focus media efforts on platforms and formats that support **creator-led content** and **live shopping events**, which are proven to drive direct action.

↗ Targeting Focus:

Prioritise audiences with high engagement rates and propensity for impulse buys.



03 SEARCHING

Ramadan Intent Surges Early

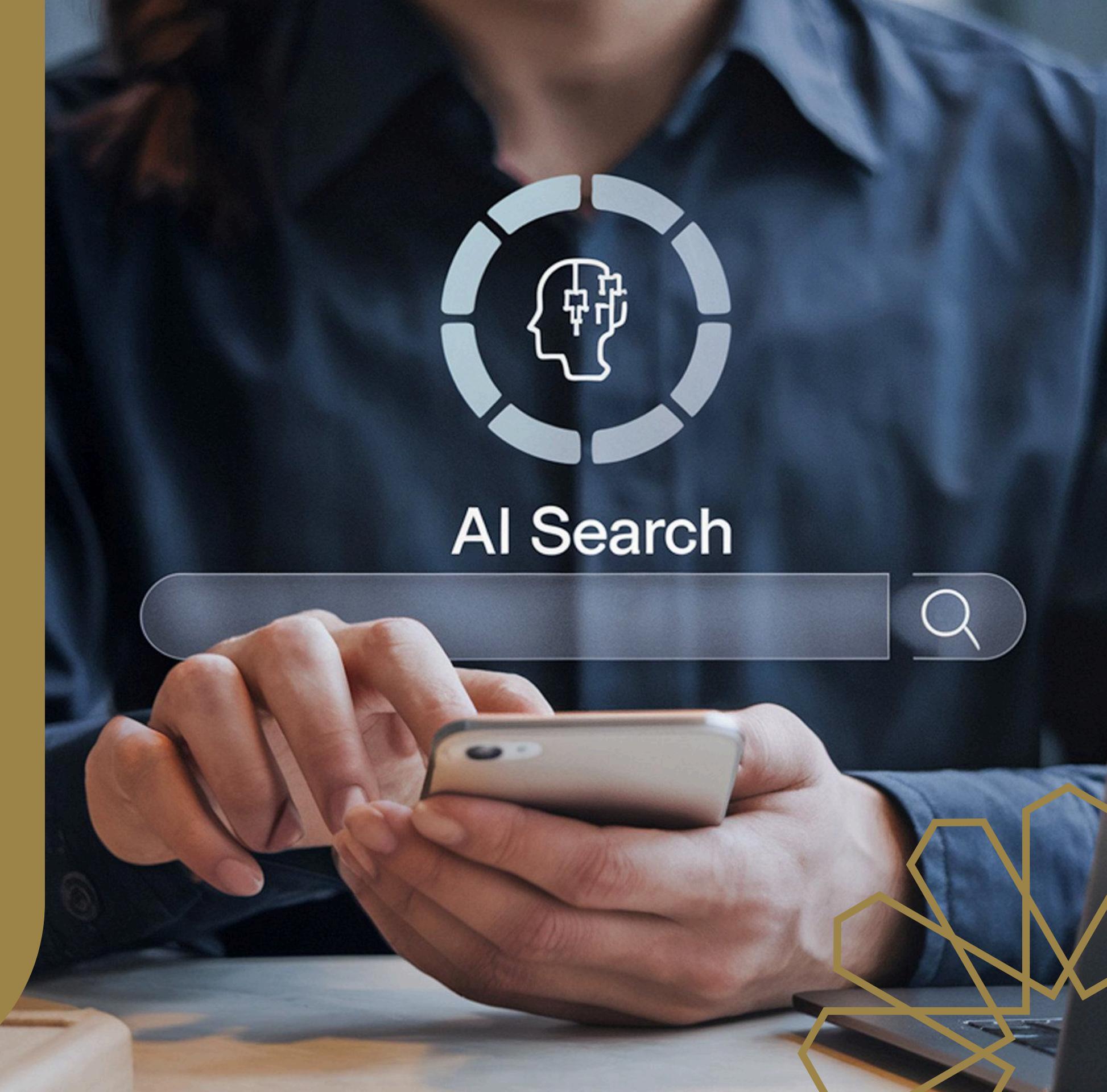
The cultural and ritualistic nature of Ramadan causes Search behaviour to spike earlier and become intensely focused on preparation, promotion, and gifting.

How is this Behaviour Intensifying?

Search volume is historically up 10% Year-on-Year (YoY) across the UAE and KSA. The intention is highly specific: Luxury search spikes in late Ramadan (KSA +136%, UAE +20%), and Fashion searches surge pre-Eid (KSA +136%, UAE +58%), reinforcing the category-specific nature of search spikes.

What This Means

Ramadan Search is fundamentally early, category-specific, and promotion-driven. Consumers are actively looking for specific recipes, gift ideas, deals, and Ramadan calendars, demonstrating high purchase intent well before the core shopping window.



03 SEARCHING

Strategic Implications for Advertisers

↗ Media Strategy:

Activate campaigns pre-Ramadan to capture prep-phase searches before competitors saturate the market.

↗ Targeting Focus:

Optimise SEO, AEO and paid search for specific, promotional and inspirational queries. Extend reach by leveraging **Retail Media Solutions** to place ads on high-intent environments (e.g., grocery or online pharmacy sites) where consumers are actively searching for category essentials.

↗ Creative Focus:

Ensure search landing pages deliver content and offers that immediately answer the consumer's high-intent query, potentially using **Generative AI** to tailor the messaging instantly based on the specific search term.



04 SHOPPING

Multi-Platform, Impulsive, Late-Night

The ultimate outcome of the amplified 4S behaviours is a surge in commerce that is non-linear and temporally diverse, reflecting the shift in daily routines.

How is this Behaviour Intensifying?

Consumer spending rises significantly (UAE +17%, KSA +11%), as highlighted by YouGov. Tap Payments reported that the share of transactions between 10:00 PM and 4:00 AM more than doubled in Saudi Arabia and Kuwait during a recent Ramadan, and increased by almost 11 percentage points in the UAE. E-commerce activity peaks dramatically between 12:00 AM and 3:00 AM.

What This Means

Shopping is no longer the final, predictable step of a funnel; it happens whenever the inspiration hits – whether that be a scroll, a stream, or a search. Impulse buying, driven by time-sensitive offers, increases drastically. The journey is multi-platform, meaning consumers may be influenced on one screen (e.g. Streaming) and convert on another (Shopping via mobile).



04 SHOPPING

Strategic Implications for Advertisers

↗ Media Strategy:

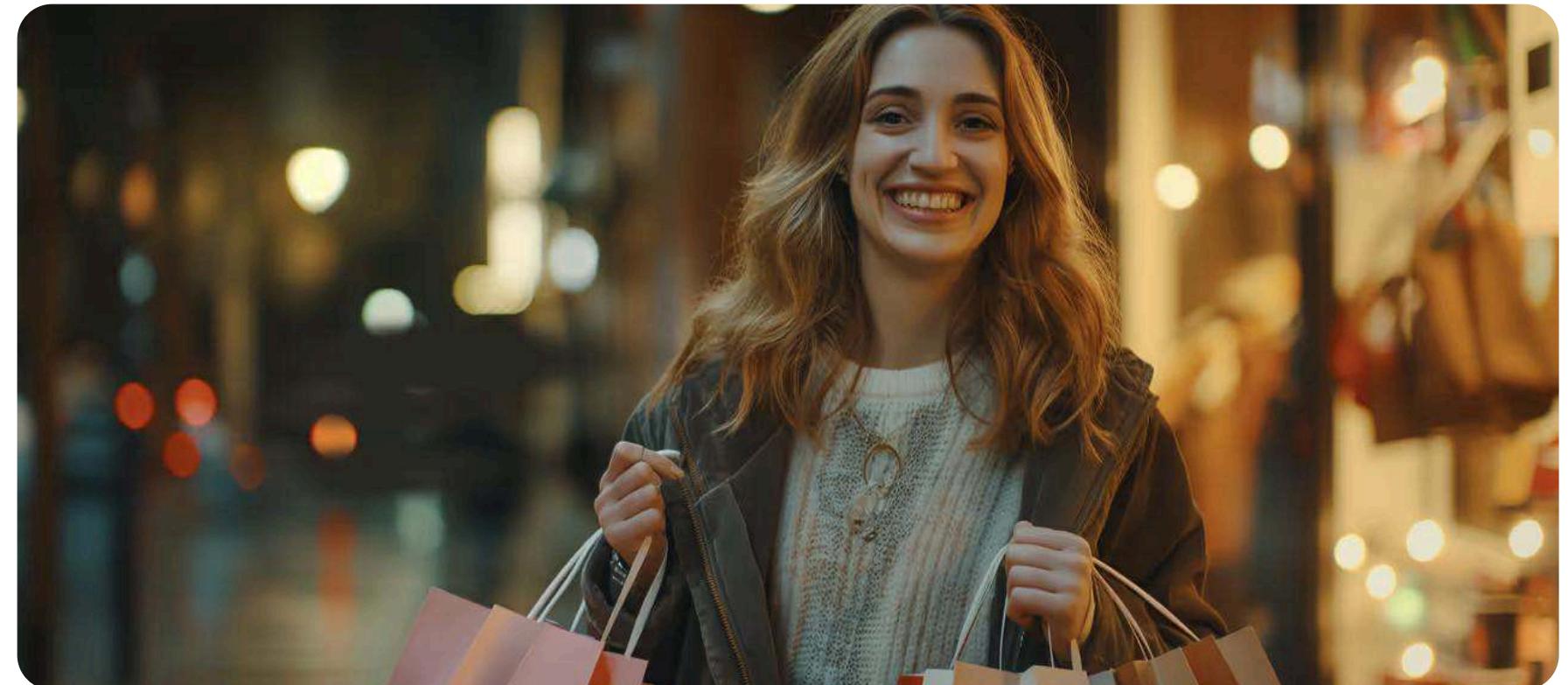
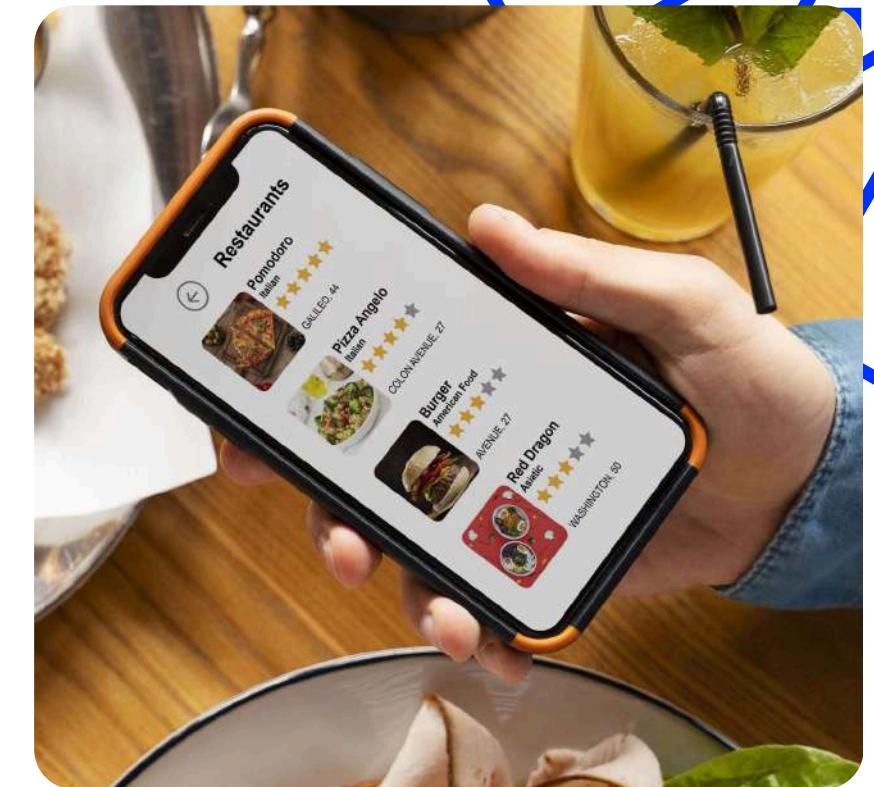
Push promotions, bundles, or limited-time offers to trigger impulse buys during the high-intent, late-night window. Use retail media solutions across key platforms (e.g., e-commerce, food delivery apps) to leverage immediate purchase signals and ensure products are visible on the digital shelf.

↗ Targeting Focus:

Enable easy, multi-platform purchase paths and ensure seamless integration between social platforms and e-commerce sites to minimise friction at the point of purchase.

↗ Creative Focus:

Focus on clear calls-to-action that simplify the decision and reduce shopping time, acknowledging the high "Ramadan stress" that drives demand for convenience. High-impact formats can be used for final offers to ensure prominence in crowded late-night apps.



DEEP DIVE: 3 KEY VERTICALS THROUGH THE LENS OF THE 4S

This section maps the unique influence pathways for three key verticals—Automotive, FMCG, and eCommerce/Retail—which are particularly important during Ramadan due to outsized consumer interest. We bring each vertical to life with a detailed example, drawing clear strategic implications for advertisers: how they should be planning and measuring their campaigns, as well as the specific activation tactics they should be deploying during the holy month.



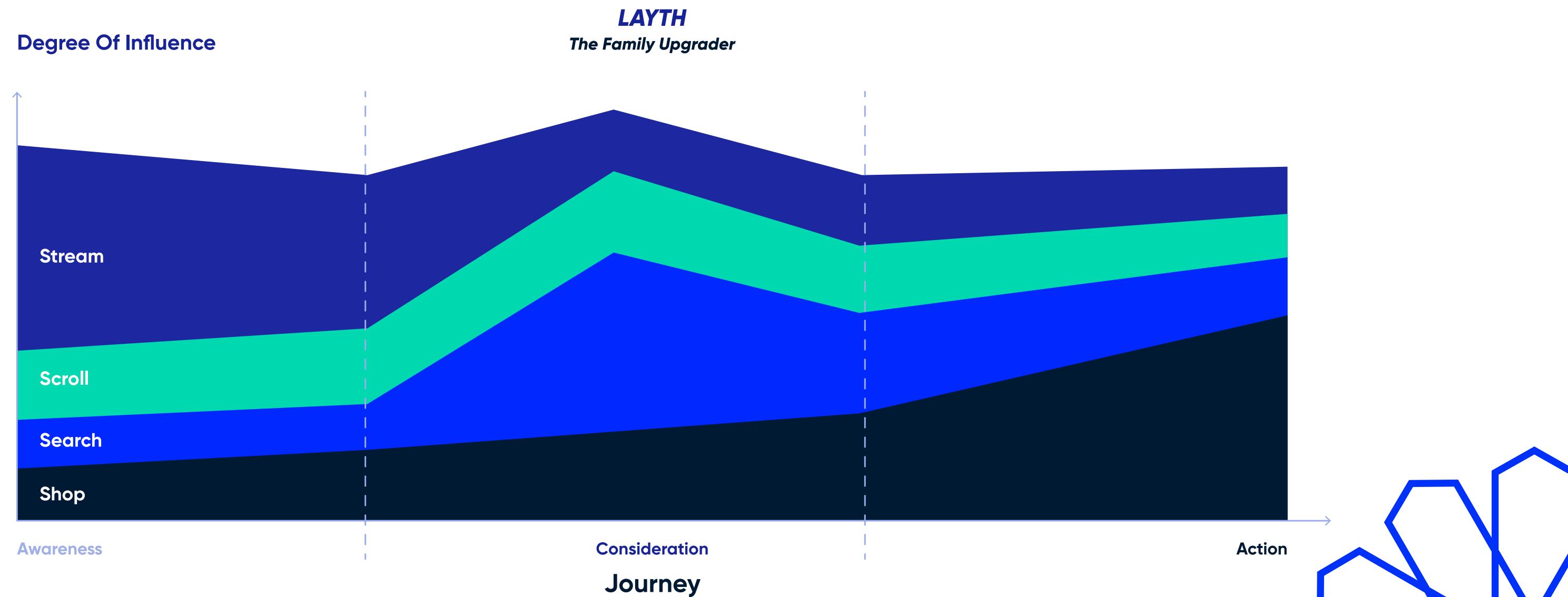
AUTOMOTIVE: THE FAMILY-INFLUENCED, HIGH-CONSIDERATION JOURNEY

Layth (35, KSA) wants to upgrade his family SUV, driven by the fact that the season is culturally associated with major promotional offers and the purchase of a new car for family upgrades or Eid travel. Discounts are highly anticipated, and his family is involved in the evaluation.



AUTOMOTIVE: THE FAMILY-INFLUENCED, HIGH-CONSIDERATION JOURNEY

Ramadan-specific journey:



AUTOMOTIVE: THE FAMILY-INFLUENCED, HIGH-CONSIDERATION JOURNEY

Ramadan-specific journey:

STREAMING

Layth and his family watch a popular Ramadan drama on CTV. During the ad break, they see a bold, emotional SUV commercial featuring a generous Ramadan financing package. This triggers initial discussion (co-viewing).

SCROLLING

Later that day, Layth sees a highly tailored ad on social media showing a local creator reviewing the specific SUV model, highlighting family features. He saves the video and shares it with his wife.

SEARCHING

The family decides they like the model but want to see competitor pricing. Layth uses a voice search query to ask: "Compare SUV X financing with Competitor Y deal."

The next morning, Layth's wife uses Google to search for "Best Ramadan SUV Deals KSA" and "interest-free car instalments" to check the offer's viability. They check car review sites.

SHOPPING

Layth uses the automaker's app to calculate payment plans and book a virtual test drive slot via the integrated chat function, completing the pre-qualification for financing online to secure the Ramadan bonus. The purchase process begins before Eid.



SHIFT FROM THE REST OF THE YEAR:

The journey is highly compressed into the Ramadan/pre-Eid window. The decision-making is heavily influenced by high-attention Streaming (family co-viewing) and urgent, repeated Searching (discounts and Ramadan bonuses), unlike a typical, slower, price-driven purchase cycle.

STRATEGIC IMPLICATIONS FOR AUTOMOTIVE ADVERTISERS

FOCUS AREA	PLANNING & MEASUREMENT	ACTIVATION TACTICS
MEDIA/TARGETING	<p>Planning: Secure high-attention video inventory using PMP/PG deals against premium content.</p> <p>Measurement: Track Co-viewing metrics and site visits from CTV impressions to prove cross-platform influence.</p>	<p>Employ multi-screen campaigns (CTV + Mobile) to bridge the emotional awareness created during Streaming with the mobile action phase.</p>
CREATIVE	<p>Planning: Pre-produce rich media that highlights the expected discounts, financing, and generous Ramadan packages.</p> <p>Measurement: Track Video completion rate and engagement on creator-led content.</p>	<p>Focus on the emotional narrative of family, safety, and travel in Streaming storytelling. Use Generative AI for rapid copy variants to test promotional messaging in Scrolling.</p>
CONVERSION	<p>Planning: Ensure the Shopping phase supports financing and test drive scheduling.</p> <p>Measurement: Track Leads generated from multi-platform campaigns and financing application starts.</p>	<p>Facilitate easy online-to-offline actions. Ensure the app and website provide seamless shopping functionality, such as payment calculators, to close the loop after high-intent Searching.</p>



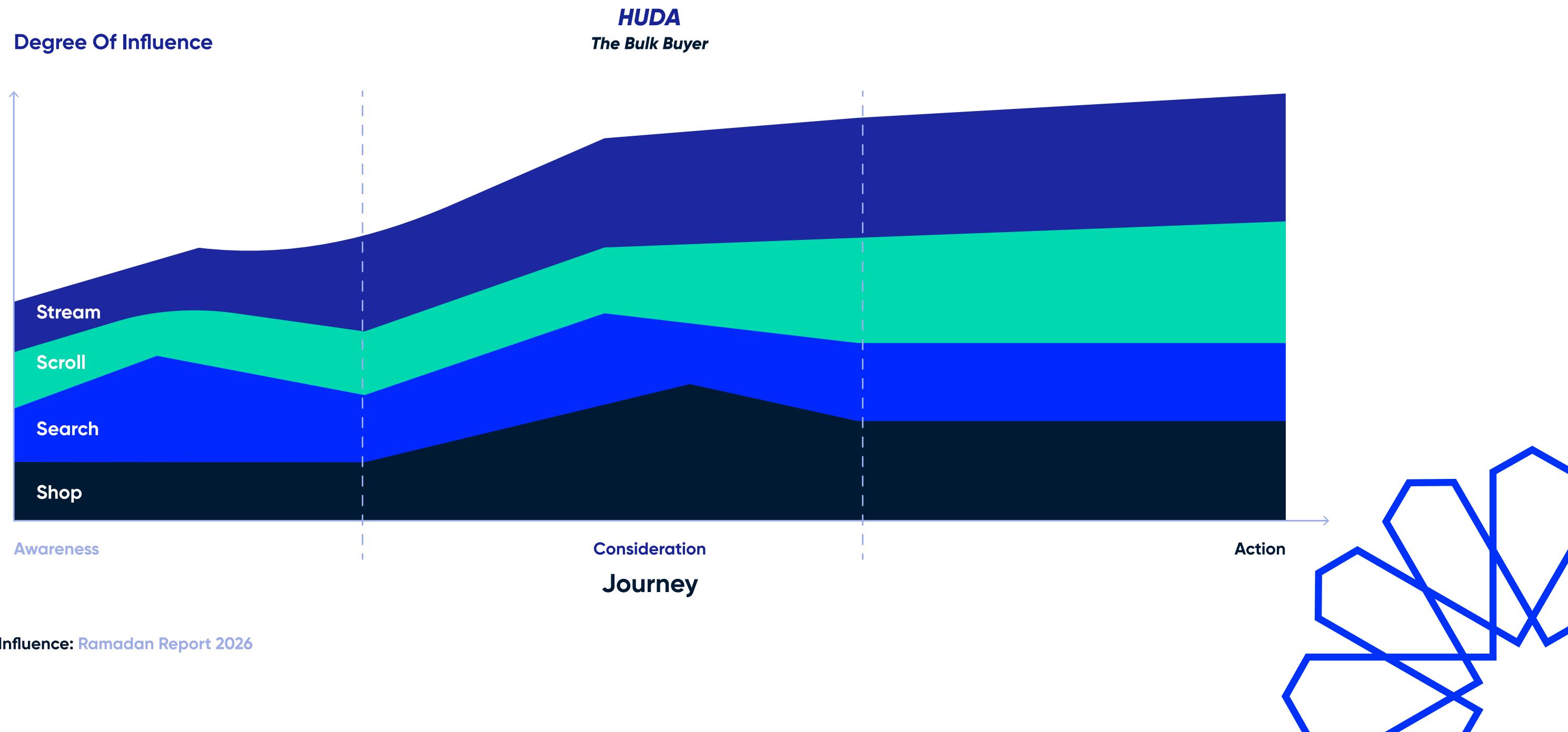
FMCG: THE RECIPE-DRIVEN, CONVENIENCE-FOCUSSED JOURNEY



Huda (28, KSA) needs to buy a specific kitchen cleaning product as she bulk buys household essentials and follows new Iftar recipes. Her focus is on large, efficient purchases due to the high domestic consumption during Ramadan. FMCG generally sees an intense spike driven by meal preparation and more time spent at home. The focus is heavily on convenience and time-saving during fasting hours.

FMCG: THE RECIPE-DRIVEN, CONVENIENCE-FOCUSED JOURNEY

Ramadan-specific journey:



FMCG: THE RECIPE-DRIVEN, CONVENIENCE-FOCUSED JOURNEY

Ramadan-specific journey:

STREAMING

While prepping dinner, Huda plays a YouTube tutorial. She sees an embedded banner ad for a complementary product (e.g., dish soap) and purchases it immediately via the app's link.

SCROLLING

While waiting for delivery confirmation, Huda browses TikTok and sees a short, entertaining video using the cleaning product, reinforcing her purchase decision and leading her to share the video with a friend.

SEARCHING

In the afternoon (pre-Iftar pressure), Huda searches for a specific ingredient and "quick clean kitchen hacks" on Google. She sees an ad for a large "Ramadan Family Pack" cleaning product bundle.

SHOPPING

Huda opens her grocery delivery app. As she searches for other essential cleaning supplies within the app, an ad for the "Ramadan Family Pack" is shown prominently. It leverages a high-intent signal (searching for general cleaning supplies) to reinforce the purchase. She adds the large pack to her cart (meeting the bulk-buy need).



SHIFT FROM THE REST OF THE YEAR:

The journey is highly compressed and overlapping, with Searching directly jumping to Shopping, and then validation/advocacy occurring through Streaming and Scrolling. The use of endemic Retail Media to influence the initial cart load is critical, as purchase volumes are heavily skewed toward large family-size packs.

STRATEGIC IMPLICATIONS FOR FMCG ADVERTISERS

FOCUS AREA	PLANNING & MEASUREMENT	ACTIVATION TACTICS
MEDIA/TARGETING	<p>Planning: Prioritize media spend for the spike in Searching (pre-Iftar) and Shopping (post-Iftar).</p> <p>Measurement: Track Keyword-specific CTRs and conversion rates, and time-of-day purchase patterns.</p>	<p>Use YouTube contextual solutions against food, recipe, and homemaking content, ensuring ad alignment with high-attention moments. Drive impulse via social and live commerce.</p>
CREATIVE	<p>Planning: Focus content on utility, convenience, and time-saving hacks.</p> <p>Measurement: Track Social engagement metrics (saves, shares) and Video completion rates on short-form content.</p>	<p>Use Generative AI for rapid creative versioning linking products to recipes and essential hacks. Use Rich Media to clearly communicate the value of family/bulk packs.</p>
CONVERSION	<p>Planning: Optimize product offerings for bulk-buy (Family Packs).</p> <p>Measurement: Track Basket size / average order value and Promo code redemptions.</p>	<p>Maximize in-app influence by using Retail Media solutions on grocery and delivery platforms to capture immediate purchase intent from high-intent signals</p>



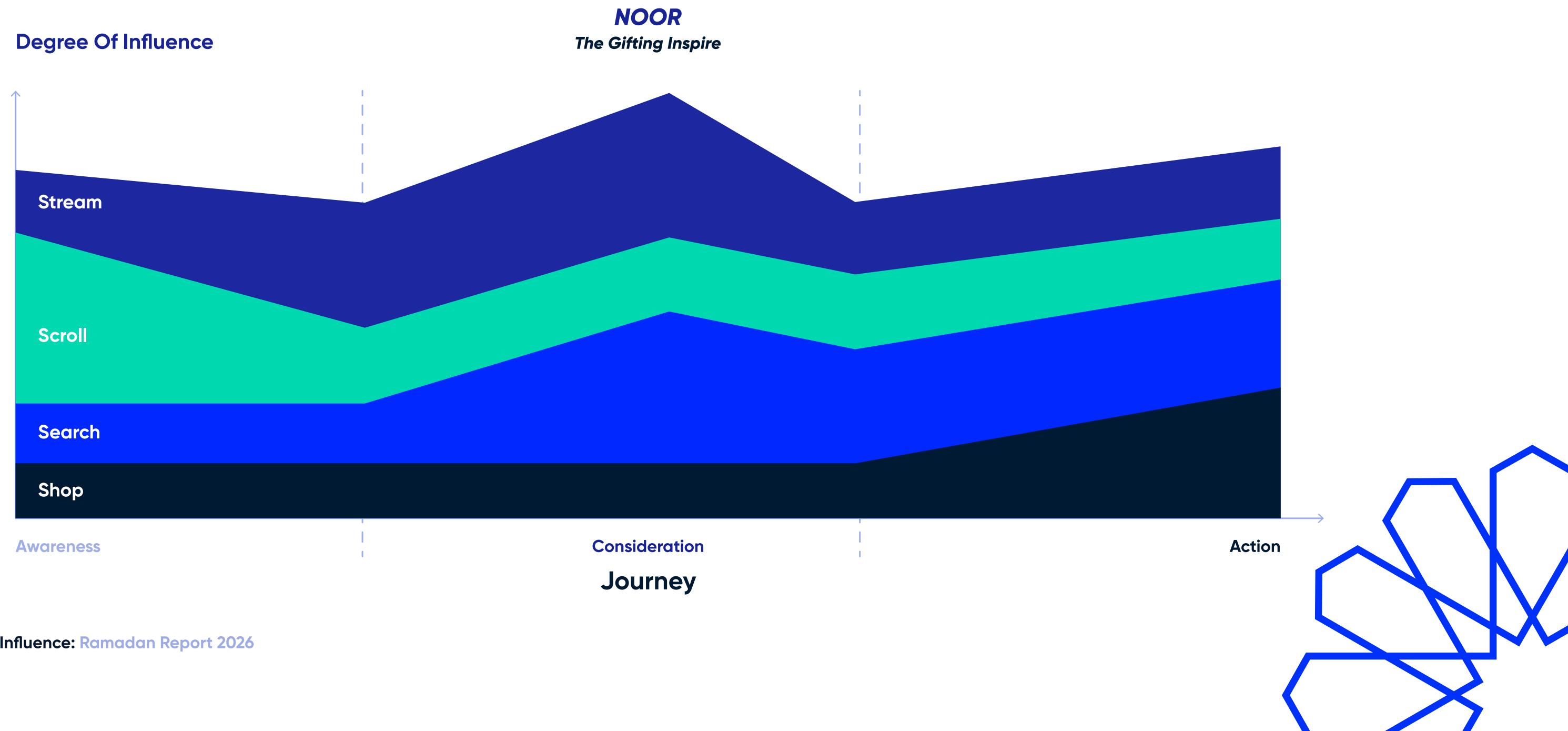
ECOMMERCE/RETAIL: THE GIFTING-FOCUSED, VALUE-DRIVEN JOURNEY

Noor (30, UAE) is looking for a unique, high-quality gift for her sister for Eid Al-Fitr. She is looking for inspiration and is highly sensitive to price and fast delivery. The retail journey, especially around gifting for Eid, is intensely emotional, value-sensitive, and impulse-driven, peaking in the final weeks of Ramadan.



ECOMMERCE/RETAIL: THE GIFTING-FOCUSED, VALUE-DRIVEN JOURNEY

Ramadan-specific journey:



ECOMMERCE/RETAIL: THE GIFTING-FOCUSED, VALUE-DRIVEN JOURNEY

Ramadan-specific journey:

STREAMING

While checking reviews on YouTube, she sees a high-impact video ad from the original perfume brand promoting a limited-time flash sale on the set she desires. This re-engages her with the original brand.

SCROLLING

After Taraweeh prayer, Noor browses TikTok. She sees a promoted video featuring a creator unboxing a luxurious perfume set, tagged as an ideal "Eid gift" (Gifting Inspiration).

SEARCHING

She immediately switches to Google to search for "Luxury perfume set review" and, crucially, "Eid gift express delivery UAE" to check logistics and pricing.

SHOPPING

She navigates to the brand's e-commerce site, selects express checkout, and purchases the gift immediately, influenced by the urgency (flash sale) and fast delivery.

She immediately goes to Instagram and posts a story about the great deal and fast delivery, influencing her own network.



SHIFT FROM THE REST OF THE YEAR:

The path is dictated by urgency and value sensitivity. The journey relies heavily on quick-fire inspiration from Scrolling (creator content) and immediate validation via Searching. Cross-platform discovery is critical, with the high-attention Streaming ad acting as the final influence trigger, which then loops back into a Shopping advocacy moment.

STRATEGIC IMPLICATIONS FOR ECOMMERCE/RETAIL ADVERTISERS

FOCUS AREA	PLANNING & MEASUREMENT	ACTIVATION TACTICS
MEDIA/TARGETING	<p>Planning: Target the high-impulse Scrolling window (post-Iftar) with creator content. Secure inventory using PMP/PG deals against popular gifting and fashion content.</p> <p>Measurement: Track Time-of-day purchase patterns and Multi-platform conversion paths.</p>	<p>Use multi-screen campaigns to track users who saw high-impact Streaming ads and converted later via mobile Shopping. Use Retail Media solutions on your own/partner e-commerce platforms to drive conversion at the digital shelf.</p>
CREATIVE	<p>Planning: Combine rich video content with social and search-driven discovery.</p> <p>Measurement: Track Promo code redemptions and Click-throughs from influencer content.</p>	<p>Use rich media and high-impact formats to clearly communicate urgency, fast delivery, and discounts. Time-limited offers & flash sales are highly effective for conversion.</p>
CONVERSION	<p>Planning: Ensure the site supports urgent purchase factors (e.g., fast delivery, clear return policy).</p> <p>Measurement: Track Basket size / average order value & Online/offline conversion rates.</p>	<p>Prepare for late-night impulse shopping. Enable high-value shopping features like "Buy Now, Pay Later" (if applicable). Cross-platform attribution is critical to link the initial social discovery to the final transaction.</p>

