SUMMER IN EGYPT 2026

Summer as a Nationwide Behavioural Shift

PLATFORMANCE™

1 THE NEW SUMMER REALITY IN EGYPT 2026

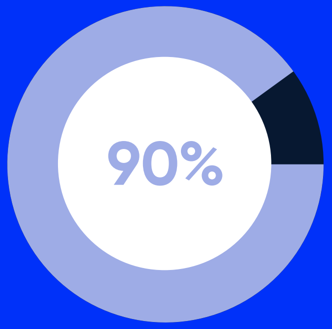
SUMMER AS A NATIONWIDE BEHAVIOURAL SHIFT

Summer in Egypt is a nationwide behavioural shift that reshapes how people live, consume, and engage with brands. It affects the entire population, across income levels, geographies, and lifestyles. Unlike markets where summer is primarily associated with travel or tourism, Egypt's summer changes behaviour for those who travel and those who stay at home in equal measure.

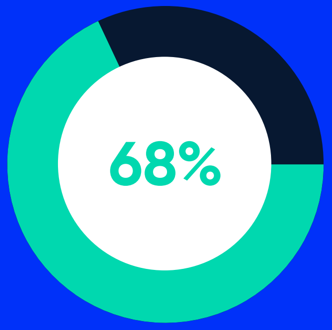
THE SCALE OF THE OPPORTUNITY

With a population exceeding 100 million, this period represents one of the largest annual shifts in attention, mobility, and spending behaviour in the region. The infrastructure for this shift is already in place: 90% of Egyptians access the internet via smartphone, 68% use YouTube monthly, and 46% watch short form video daily (GWI Egypt, 2025).

Yet in our experience, summer in Egypt remains largely untapped as a structured marketing moment. Most brands approach it as a single campaign window rather than what it is: a complex behavioural environment where multiple consumer realities operate in parallel. This report sets out a new framework for understanding & activating summer in Egypt.



Use Smartphone



Use YouTube Monthly

HOW BEHAVIOUR IS EVOLVING

This report moves beyond a traditional observation based approach. Rather than describing what the market looks like, it focuses on how consumer behaviour is changing and what that means for brands.

It examines three layers of change.

First, the seasonal shift

Summer pushes daily routines later, increases time spent at home, and amplifies digital consumption. These patterns repeat each year, but their commercial significance is often underestimated.
Egypt is a market shaped by recurring seasonal shifts, each of which changes how people spend, consume media, and engage with brands in ways specific to that period. Summer is one of these moments. Understanding it well means treating it as part of a broader pattern rather than an isolated peak.

Second, the multi-year trend

Egyptian consumers have become more mobile first, more delivery dependent, more value conscious, and more digitally active over several years. Summer 2026 sits at the latest point on that curve, which means the seasonal effect is landing on a more digitally mature consumer base than it was even two or three years ago.

Finally, the 2026 moment

The FIFA World Cup 2026, with matches extending into late night and early morning hours, is expected to create the most concentrated attention window Egypt has seen during summer. It amplifies a behaviour that already exists and gives it a sustained focal point.
By examining these three layers together, the report provides a framework that is both grounded in current data and forward looking enough to guide summer planning for 2026 and beyond.

WHY THIS MATTERS

Summer in Egypt affects media consumption, spending patterns, mobility, and social activity at a national scale. It changes when people are reachable, where they are spending, and what influences their decisions.
Three things make this particularly important right now.

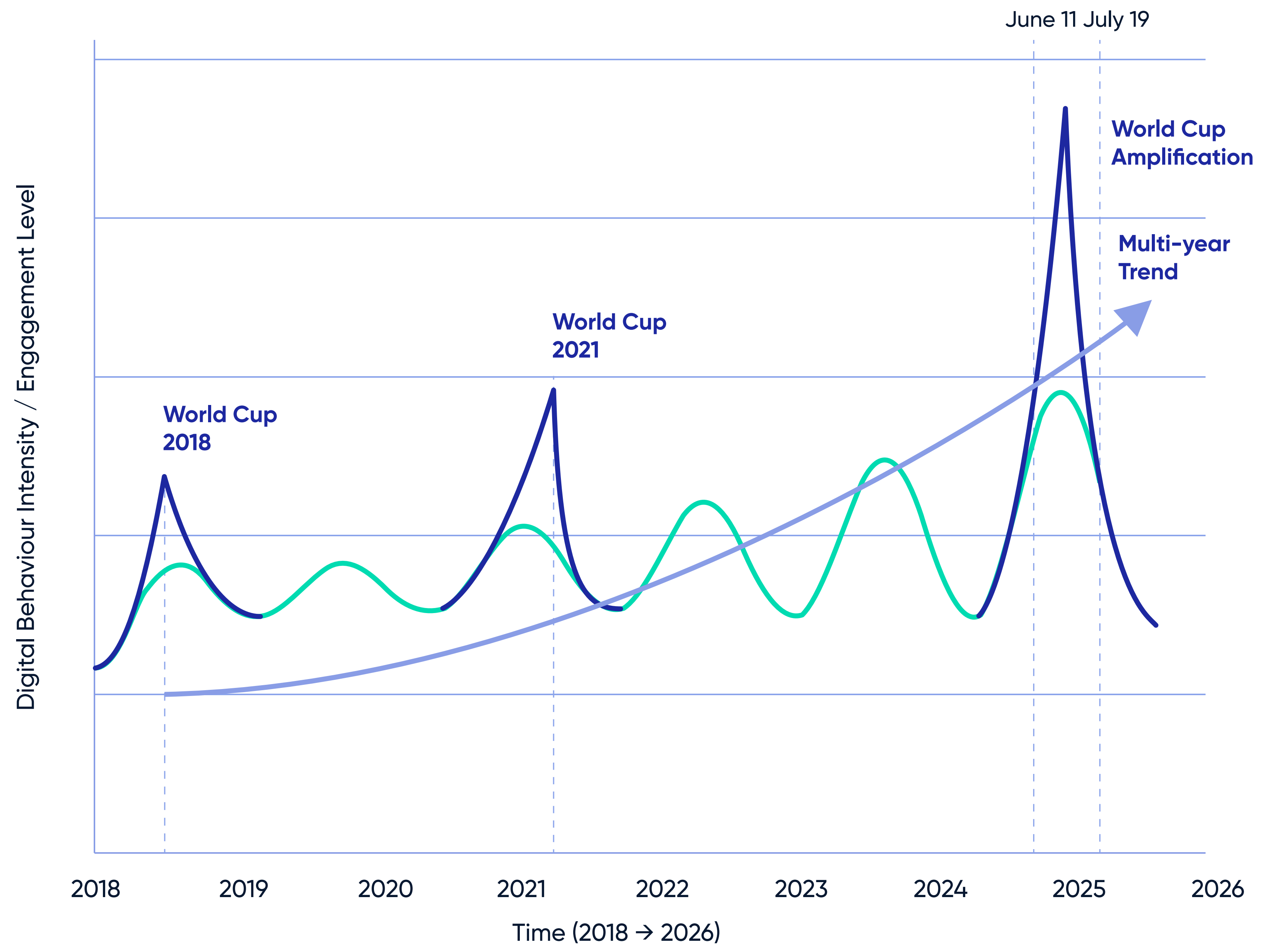
A mass market moment

Summer touches every income level and geography in Egypt. It changes behaviour even for those who do not travel. This makes it a national commercial opportunity, the kind that relatively few seasonal moments in any market can match.

Higher economic stakes

Egyptian consumers are navigating rising costs and increased price sensitivity. They are planning purchases more carefully, seeking deals more actively, and gravitating toward trusted brands. Summer spending still happens, but the consumer expects to be met with value and relevance. Brands that understand this dynamic tend to outperform those that rely on aspiration alone.

How Behaviour in Egypt Evolves: Trend, Seasonality, and Amplification



Summer behaviour builds on long-term digital growth, with 2026 representing a uniquely amplified moment rather than a structural shift.

WHY THIS MATTERS

An intensified window of opportunity

The convergence of existing behavioural trends with the World Cup creates an intensified window of opportunity compared to previous years. Late night attention windows are expected to be longer, digital engagement more intense, and consumption moments more frequent and context driven.

What this means for brands

For brands, the implication is that summer in Egypt should be approached as a complex behavioural environment rather than a single campaign moment. Matching activity to the right audience, at the right time, through the right combination of channels is what tends to separate strong summer performance from average results. That means understanding which consumers are where, when they are most reachable, and what kind of message and format they are most likely to respond to.

The sections that follow provide the data, the framework, and the direction to make that possible. To understand how this behavioural shift plays out in practice, it is necessary to look at the different consumer realities that define summer in Egypt.

WHO THIS REPORT IS FOR

This report is written for marketing leaders, brand teams, and agencies operating in Egypt, or those planning to enter the market.

It is most useful for brand and marketing directors setting summer strategy, media and campaign planners building execution plans, and agency teams whose clients are asking how to approach a summer that includes both the usual seasonal dynamics and the additional variable of the World Cup.

The report does not assume prior knowledge of the Egyptian market. It does assume the reader wants to move beyond broad seasonal intuition and toward decisions grounded in how Egyptian consumers actually behave during summer: where they are reachable, what motivates them to spend, and what tends to separate effective summer campaigns from those that underdeliver.

Senior marketing leaders will find the framework in Sections 2 and 7 most directly applicable to strategic planning. Campaign and media teams will find the platform analysis in Section 6 and the activation framework in Section 7 most useful at an execution level.

INDUSTRY PERSPECTIVES

"Summer in Egypt is no longer defined by separate moments like Eid, Sahel season, and peak summer. Instead, they blend into one continuous lifestyle shift. Eating habits are evolving from structured family meals to lighter, quicker, and more flexible options such as pasta, chicken pane, shawarma, koshary, grilled fish, salads, and sandwiches that suit the heat, travel, and busy schedules.

This shift is creating new opportunities for categories like edible oils and pasta. In Sahel homes, quick and practical meals dominate, while in cities, cooking is increasingly pushed to cooler morning or evening hours.

Brands like Italiano and Afia are becoming relevant through fast, convenient meal solutions that fit these changing routines. While portion sizes may be smaller, consumption occasions remain frequent through snacking, light cooking, and social gatherings. Our content strategy focuses on inspiring consumers within these everyday moments rather than simply promoting products.

From quick dinner ideas to barbecue tips and family-friendly recipes, the goal is to position the brand as a useful companion in daily life. To maximize relevance, we are targeting distinct summer audiences—including Sahel travelers, city households, and late-night World Cup viewers—and aligning content with specific moments throughout the day, ensuring the brand naturally fits into consumers' routines rather than competing for attention."

HANIA SERRY

Chief Marketing Officer, Savola Foods

صافولا SAVOLA | الأغذية Foods

INDUSTRY PERSPECTIVES

"Summer 2026 will be shaped by a continued shift from media buying to full customer journey integration, where brands win by embedding into real moments, not just by driving visibility.

At Breadfast, this is amplified by our evolution into a daily life platform spanning groceries, retail, coffee, financial services, and travel.

This summer is also unique due to the FIFA World Cup, which is transforming consumer behaviour: more time at home, higher ordering around match times, and stronger demand for convenience and value.

Combined with Egypt's heat, this turns summer into a major commerce moment, with users ordering across multiple categories in one session.

This summer, we are focusing on outcome driven partnerships that integrate naturally into these moments. From match-timed bundles to checkout incentives, we drive cross-category engagement and make brands part of how households experience their day, not just what they see."

DINA MAHER

Head of Advertising & Partnerships, Breadfast

Breadfast®

2 THE THREE SUMMER ECONOMIES

A Market of Parallel Realities

Summer in Egypt is experienced differently depending on where you are, what your income level is, and how your daily life changes when the season arrives. Traditional approaches tend to treat summer as a single audience, often defaulting to the North Coast as the defining image of the season. That view captures a small slice of the picture.

In practice, Egypt operates as three parallel summer economies, each with its own behaviours, consumption patterns, and commercial dynamics. Understanding the differences between them is the foundation for any effective summer strategy.

The three economies are the North Coast and its gated communities, Alexandria and its seasonal migration, and the in-city majority who remain in Cairo, Giza, and other urban centres throughout the summer. These economies operate simultaneously, and capturing summer in Egypt requires activating all three rather than defaulting to the most visible one. What follows is a look at each through the lens of the people who live it.

01 THE NORTH COAST
Visibility and Aspiration

02 ALEXANDRIA
Volume and Continuity

03 IN - CITY
Scale and Performance

The North Coast: Visibility and Aspiration

Ahmad summer

Ahmad is 32, works in marketing for a multinational in Cairo, and spends most of July and August at his family's place in Hacienda. His days follow a different rhythm: late starts, afternoons by the pool, and evenings centred around social plans that often run past midnight.

His phone is with him constantly. He is posting on Instagram, watching stories from friends at nearby compounds, and browsing brands he has spotted at pop up activations along the coast. The social environment makes him more open to trying new products than he would be in Cairo. He sees something at a gathering, looks it up on his phone, and by the next day he has ordered it.

What the data shows

Ahmad's summer represents the North Coast segment: a premium, visibility driven economy. This audience skews toward higher income consumers, with travel indices between 121 and 142, online shopping indices between 111 and 124, and a clear Instagram over index at 106 (GWI Egypt, 2025). Visa Consulting and Analytics data shows premium spending growth of 44% premium spending growth during summer.

The commercial role

The North Coast plays a critical role in shaping brand perception and aspiration. Influencer activity is concentrated here. Content creation peaks. Brands invest in on ground activations and experiential marketing. But this segment represents a small share of the total population.

Its value lies in influence and exposure. It is where brands are seen, talked about, and associated with a lifestyle. This is a visibility driven economy where perception is built, and the commercial scale sits elsewhere.

Alexandria: Volume and Continuity

Dina's summer

Dina is 38, a schoolteacher in Cairo. Every June, she moves with her two children to her mother's flat in Sidi Bishr, Alexandria. Her husband joins them on weekends. They stay for most of the summer, sometimes eight or nine weeks.

Her daily life is routine based. She shops for groceries in larger quantities, eats out with the family once or twice a week, and browses Facebook in the evenings for deals and offers shared in local groups. Her children watch YouTube for hours each day. She uses Talabat more frequently here than in Cairo because delivery makes the logistics of feeding a family easier.

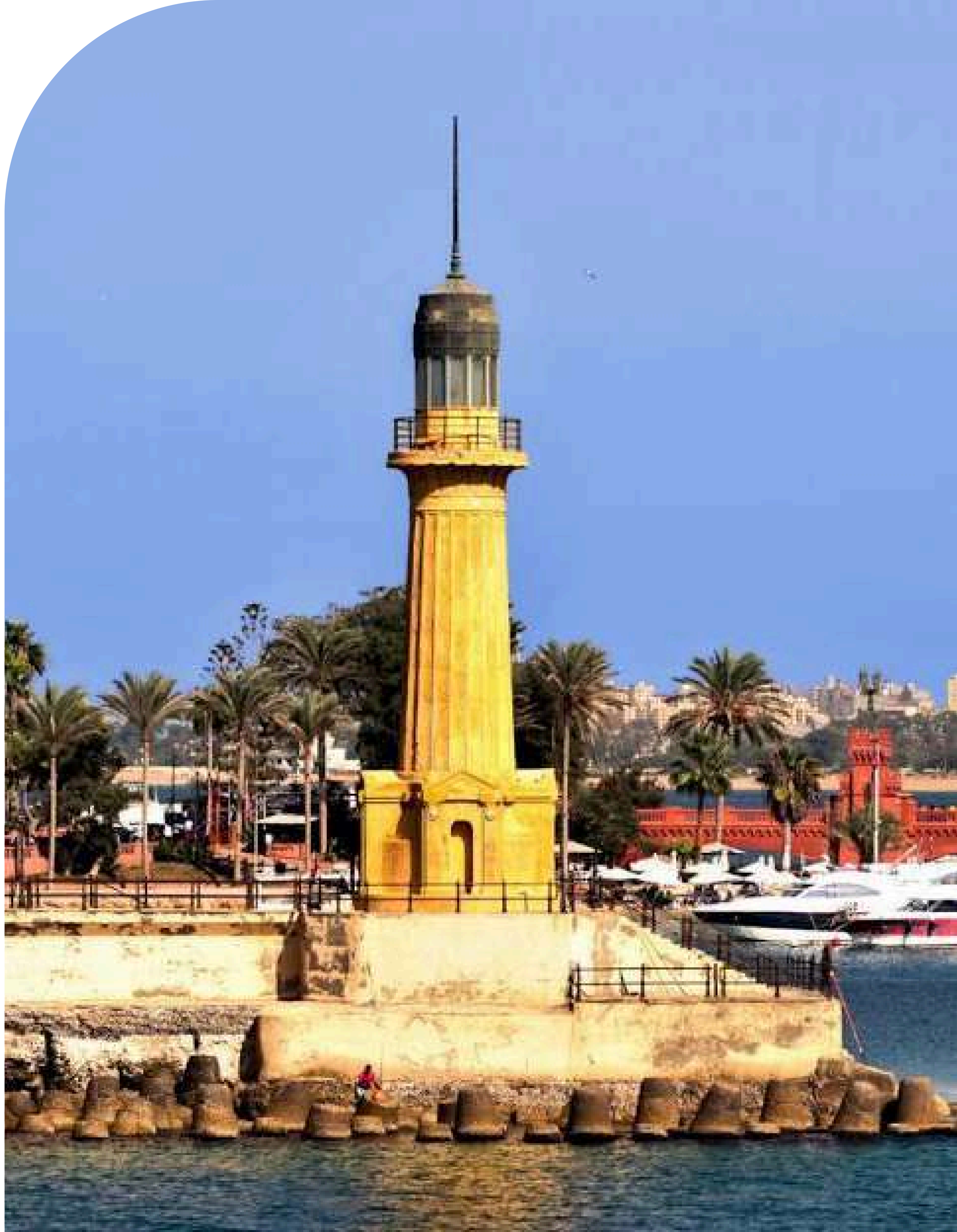
Dina is price conscious but spending consistently over a long period. She responds to family oriented promotions and prioritises quantity and reliability over novelty.

What the data shows

Dina represents the Alexandria segment: a migration economy built on volume and continuity. This audience shows balanced behaviour across most indices, typically between **100 and 112,** with an online shopping index of **106 (GWI Egypt, 2025).** The consumption is value driven and family based.

The commercial role

What makes this segment commercially important is dwell time. These consumers are in one place for weeks or months, creating repeated consumption cycles and consistent media exposure. The opportunity here is in reaching consumers during their extended stay with consistent frequency rather than short bursts. This is a volume driven economy defined by consistency, where sustained presence outweighs peak moments.



Omar's summer

Omar is 26 and works in customer service at a call centre in Giza. He stays in the city all summer. The heat makes getting around harder, so after work he heads home and stays there. Most of his social life happens on his phone.

He watches YouTube late into the night, mostly football and Egyptian comedy. He scrolls Facebook, orders from Breadfast in the mornings and Talabat in the evenings, and browses deals on his phone before buying anything. He tends to wait for a promotion before committing, and he has started using online grocery services more frequently because they are often cheaper and save him a trip in the heat.

What the data shows

Omar represents the largest segment of Egyptian summer consumers: the in-city majority. This audience shows the highest in-store shopping index at 114, alongside strong digital engagement, with a YouTube index of 106 and a Facebook index of 113 (GWI Egypt, 2025). While in-store shopping remains structurally important for this group, summer conditions shift a greater share of behaviour online, particularly due to the heat and reduced willingness to travel. As a result, digital browsing, delivery usage, and mobile-first consumption become more prominent during the summer period.

The commercial role

This is where the scale of the summer opportunity lives. The in city segment represents the majority of Egypt's population, and therefore the largest share of consumption. These consumers are digitally active, reachable through paid social and video at scale, and responsive to value based messaging and promotions.

For brands, this is a scale economy where frequency, performance, and conversion converge. It is the core growth engine of summer in Egypt, and it is the segment most often underweighted in summer planning.

THREE ECONOMIES, THREE APPROACHES

These three segments require fundamentally different approaches.

The North Coast is best activated through creator content, brand experiences, and premium digital formats. Its role is to build visibility and brand perception.

Alexandria rewards sustained frequency. YouTube, family oriented content, value promotions, and consistent presence over weeks are what tend to work best in this segment.

The in-City majority is where performance and scale converge. Facebook and YouTube provide the reach. Paid social drives discovery. Delivery platform integrations and promotion led messaging convert intent into action.

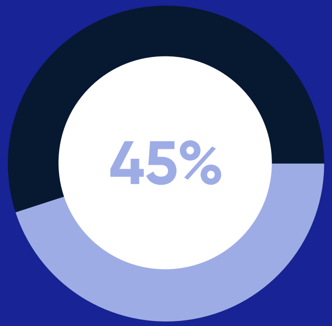
The opportunity lies in activating each economy according to its distinct behaviour, while capturing their combined scale. Brands that can do this are positioned to reach the full breadth of the market rather than a single visible segment of it.

3 BEHAVIOURAL SHIFTS: HOW SUMMER CHANGES DAILY LIFE

THE LATE NIGHT ECONOMY

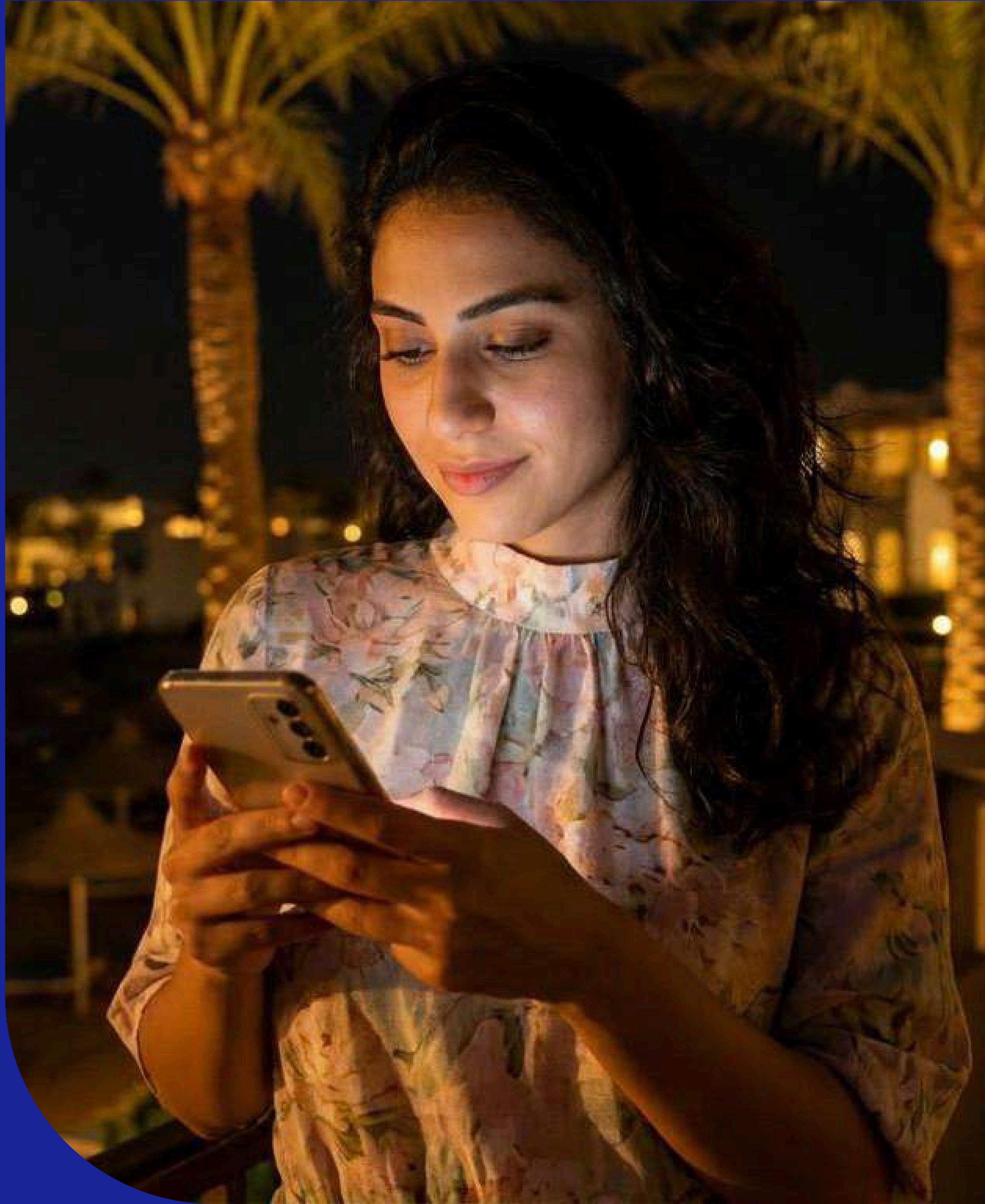
How routines shift
Summer in Egypt pushes daily life later. Heat during the day compresses productive and social hours into the evening and night, creating a consumer environment where peak activity occurs well after sunset.

The evidence
This is visible in the data. According to GWI Egypt (2025), **45% of consumers watch video content late at night and 39% browse online during the same window.** These are significant shares of the population whose attention is concentrated into a narrow band of hours, typically from around 9PM through to the early morning.



Consumers Watch Video Content Late-night

Browse Online During the Same Window

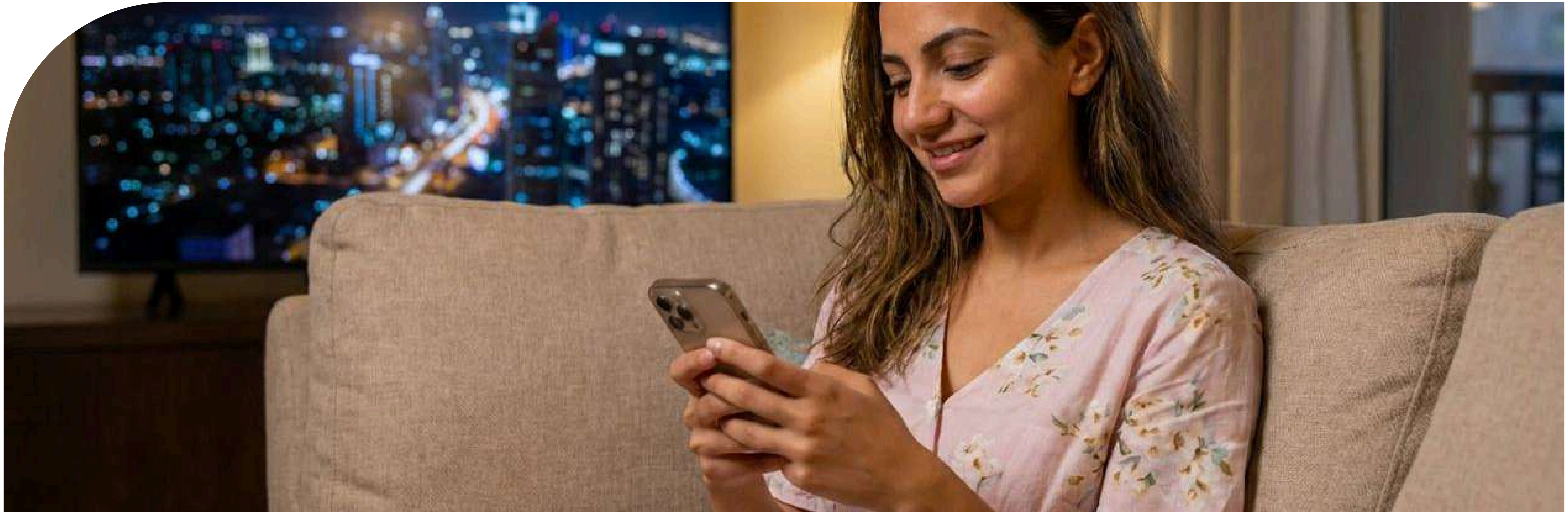


Second screen intensity

What makes this commercially important is the intensity of engagement during those hours. Consumers are more settled, more available, and more receptive. They are at home, on their phones, often with a second screen active. GWI data shows that 82% of Egyptian internet users engage in second screen behaviour, meaning they are watching content on one device while browsing, shopping, or scrolling on another.

What this means for brands

For brands, this represents an attention window that is both larger and more concentrated than during the rest of the year. The consumer is present and engaged, but reaching them requires being active during hours that many campaigns are not optimised for.



VIDEO AND STREAMING AS THE DEFAULT

Year round behaviour, summer acceleration

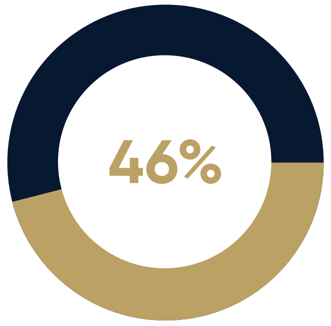
Video consumption in Egypt is already high, but summer accelerates it further. Across the population, **46% watch short form video daily and 68% use YouTube on a monthly basis** (GWI Egypt, 2025). During summer, these numbers intensify. Seasonal data from the NTRA Egypt Seasonal Digital Usage Report (2022) shows that streaming activity increases by **73%** and short video consumption rises by **69%** compared to previous periods.

Why video dominates

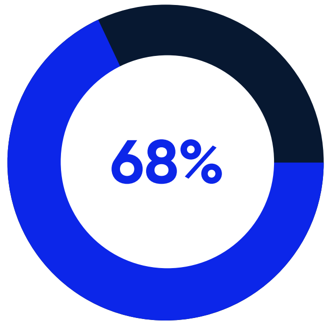
This is consistent with what happens when people spend more time indoors and shift their routines later. Video becomes the default mode of entertainment, information, and social connection. It fills the hours between the end of the working day and the late night social window.

What this means for brands

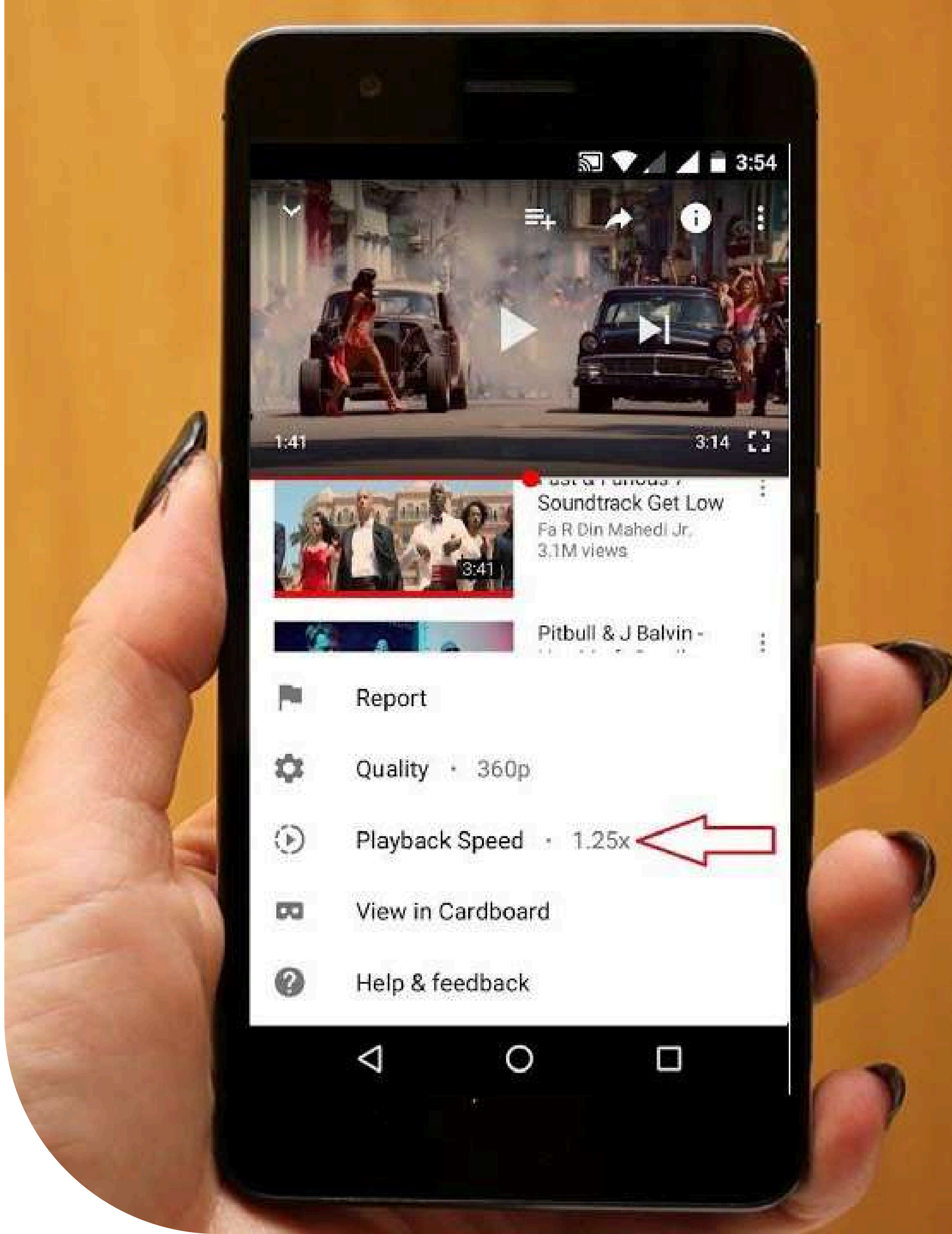
The implication for brands is that video is where the attention is during summer. It is the primary format through which consumers in Egypt engage with content during this period. Campaigns that rely heavily on static formats or text based content during summer are likely to find a smaller share of attention than those built around video.



Watch Short form Video Daily



YouTube on Monthly Basis

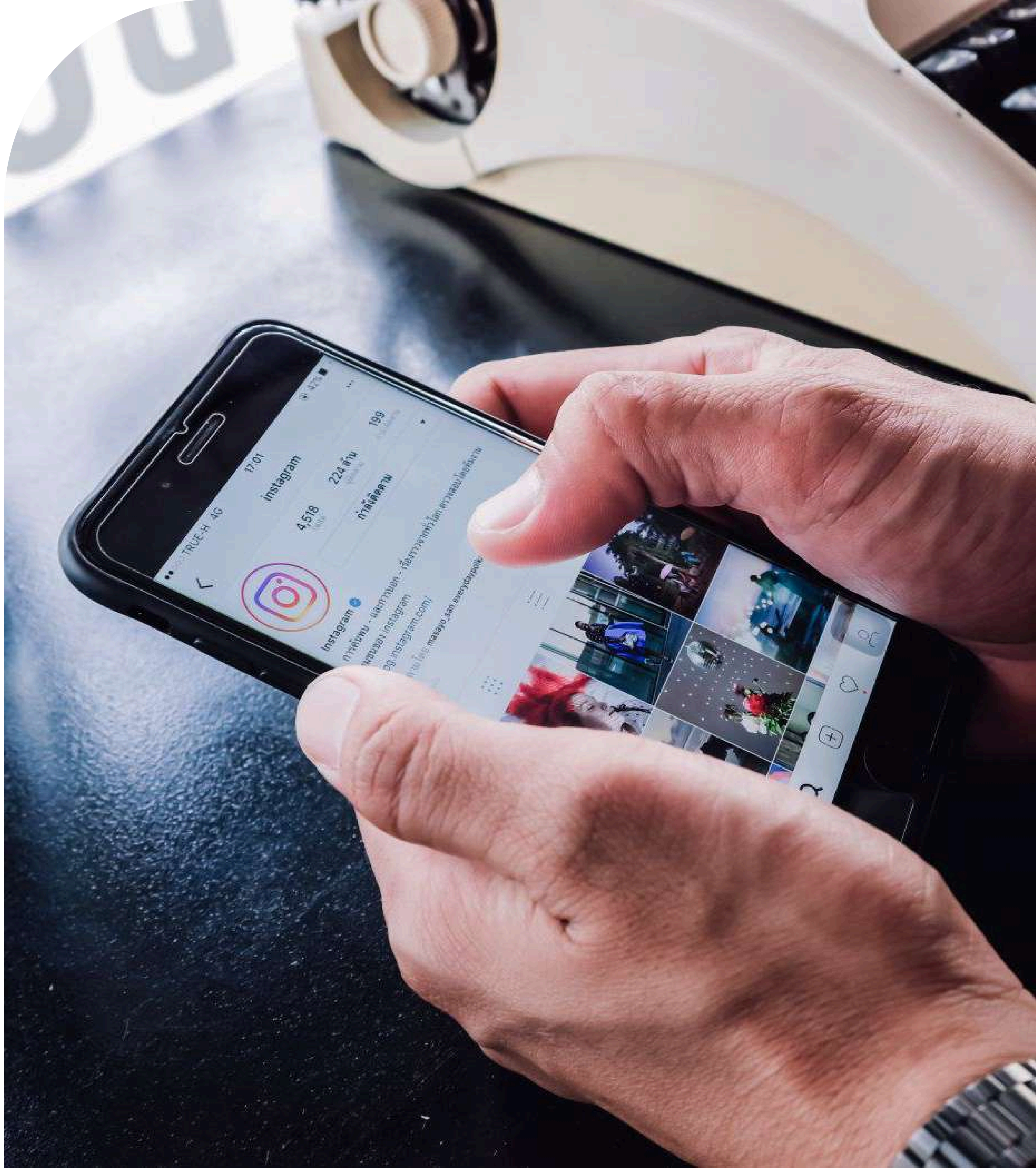


MOBILE AS THE PRIMARY ACCESS POINT

90% of Egyptian internet users access the internet through a smartphone (GWI Egypt, 2025). This figure is important because it shapes how consumers interact with content, commerce, and advertising during summer.

When mobility is reduced due to heat, the smartphone becomes the central tool for almost everything: browsing, shopping, entertainment, social activity, food ordering, and communication. It is the primary screen and the anchor of the consumer journey, even when other screens are in use.

This means that the consumer experience during summer is overwhelmingly mobile. Formats, landing pages, creative, and checkout flows that are designed for desktop are likely to underperform in a market where the phone is the dominant device.



DELIVERY AND DIGITAL CONVENIENCE

↗ A mainstream behaviour

One of the clearest behavioural shifts in Egypt over recent years has been the rise of delivery and on demand platforms. According to PwC Middle East's Voice of the Consumer Egypt report (2024), 50% of Egyptian consumers now use on demand delivery platforms, compared to a global average of 28%. **Weekly ordering sits at 23%, nearly double the global average of 12%.**

↗ Market scale

Egypt's online food delivery market reached approximately $542.9 million in 2025 (IMARC Group), and the infrastructure supporting it continues to grow. With over 75 million internet users, app based ordering has become a mainstream behaviour rather than a niche convenience.

↗ Summer amplification

During summer, this behaviour intensifies. Reduced willingness to travel in heat, combined with later routines and more time spent at home, makes delivery platforms a natural part of daily life. Consumers increasingly prefer delivery even when physical stores are nearby, driven by speed (often under one hour), real time tracking, flexible payment options, and the overall convenience of ordering from home.

↗ What this means for brands

Platforms such as Talabat, Breadfast, and Rabbit have become embedded in the daily routines of Egyptian consumers, particularly in urban areas. For brands, this means that the digital shelf and delivery platform presence are becoming as important as physical retail visibility during the summer months.

23%

Order Weekly
VS Global Average

12%

$542.9M

Size of Egyptian Online Delivery Market

THE COMPOUND EFFECT

↗ Behaviours converge

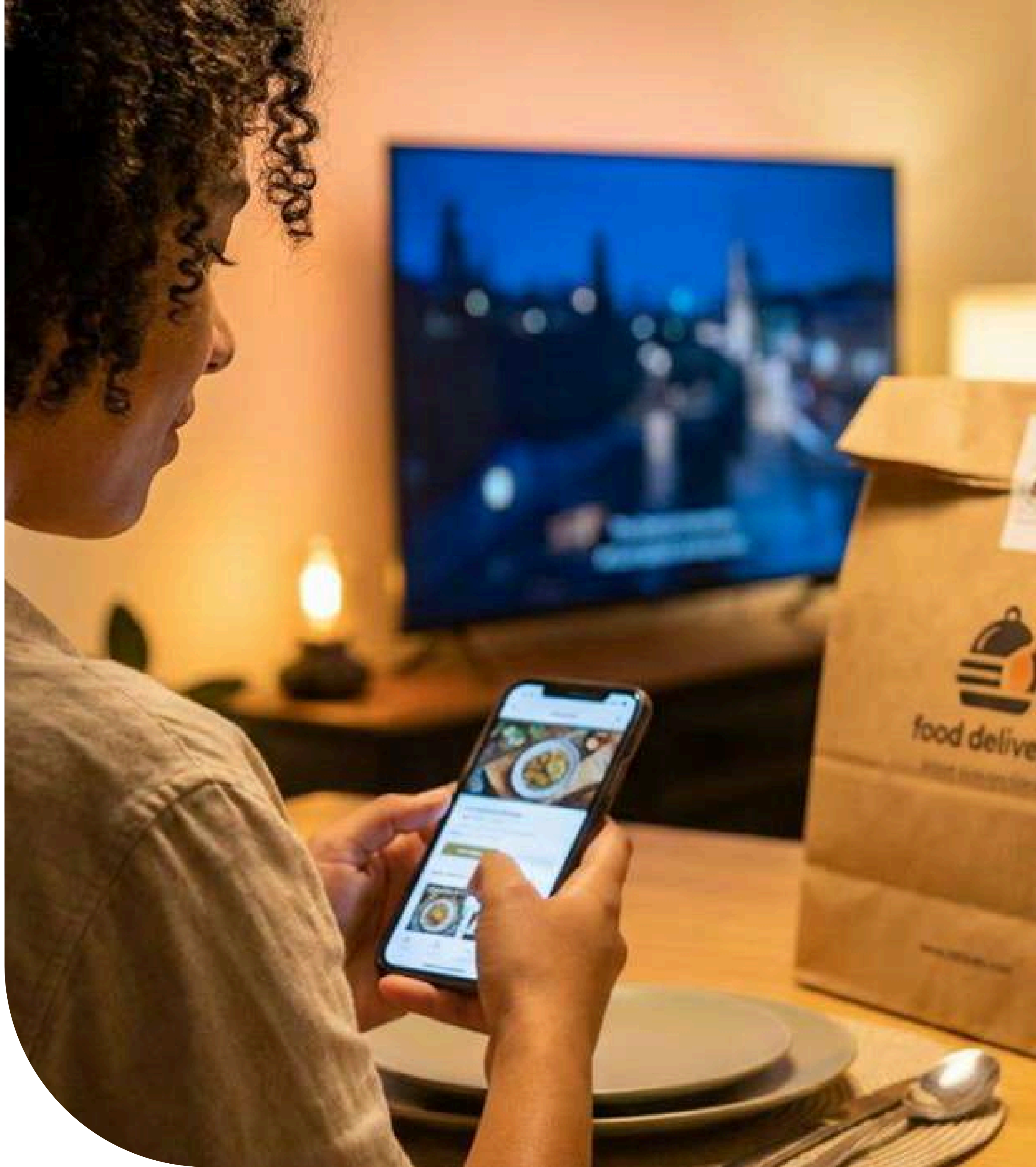
What makes these behavioural shifts commercially significant is that they operate together. They compound.
A consumer who is at home in the evening, watching video on one screen while browsing on their phone, ordering food through a delivery app, and scrolling social media between content, is engaged across multiple touchpoints simultaneously. The late night window, the video habit, the mobile dependency, and the delivery convenience all converge into a single consumption moment.

↗ Summer as an amplifier

These behaviours exist throughout the year. What summer does is amplify their frequency and concentrate them into tighter windows. According to the NTRA data, online shopping activity during summer increases by 104% compared to the prior year, a figure that reflects the combined effect of these overlapping shifts.

↗ What this means for brands

For brands, the opportunity lies in recognising that summer is when these behaviours peak together, and planning accordingly.



4 SUMMER 26: THE WORLD CUP AMPLIFIER

A SHIFT IN ATTENTION

Summer 2026 carries an additional factor that makes it materially different from previous years. The FIFA World Cup 2026, co hosted by the United States, Mexico, & Canada, is expected to create a sustained period of high engagement that overlaps directly with the Egyptian summer.

Due to the time difference between North America and Egypt, match times are expected to fall predominantly between 10PM & 6AM local time. This aligns almost exactly with the late night consumption window that already defines Egyptian summer behaviour. The result is that the World Cup amplifies a behaviour that already exists & gives it a sustained focal point.

EXTENDED LATE NIGHT WINDOWS

In a typical Egyptian summer, late night activity is already elevated. The World Cup is expected to extend these windows further and make them more consistent. Consumers are likely to be awake later, more frequently, and for longer periods. Viewing tends to be social during these events, whether at home with family, in cafes, or through shared digital experiences. Second screen behaviour, already at 82% in Egypt, is likely to intensify during match nights as viewers follow commentary, engage on social media, and browse between periods of play.

For brands, this means that the late night attention window during summer 2026 is likely to be longer and more consistent than in any previous year. The volume of reachable consumers during these hours is expected to be significantly higher.

AT HOME CONSUMPTION SURGE

FMCG and delivery uplift

The World Cup is expected to drive a substantial increase in at home consumption. Match viewing, particularly during late night hours, tends to be accompanied by food delivery, snacking, and beverage consumption. FMCG categories are likely to see sustained uplift throughout the tournament period.

Delivery platform growth

Delivery platforms are well positioned to benefit, given the existing penetration rates and the convenience they offer during late night viewing sessions. The 50% delivery platform usage rate in Egypt, already well above the global average, is likely to see further growth during this period.

A sustained demand moment

For brands in FMCG, food and beverage, delivery, and related categories, the World Cup creates a sustained demand moment rather than a single peak. Matches are spread across several weeks, meaning the consumption uplift is repeated and predictable rather than concentrated into a single evening.

Google Trends data shows a consistent pattern of rising search volume for summer categories including sunscreen and swimwear from June each year. This is consumer intent forming before the season peaks. The search behaviour is not impulsive; it follows the same deliberate, research-led pattern that characterises Egyptian consumer behaviour more broadly. Consumers are already narrowing their consideration set in June, which means the window for brand discovery and preference building opens earlier than most summer campaigns are planned for. Brands that are present during this research phase tend to be better placed to convert when the promotional trigger arrives in July and August. Entering the conversation at the height of summer, without having built any presence beforehand, means competing for a decision that may already have been made.

SOCIAL AND DIGITAL ENGAGEMENT

Content creation spikes

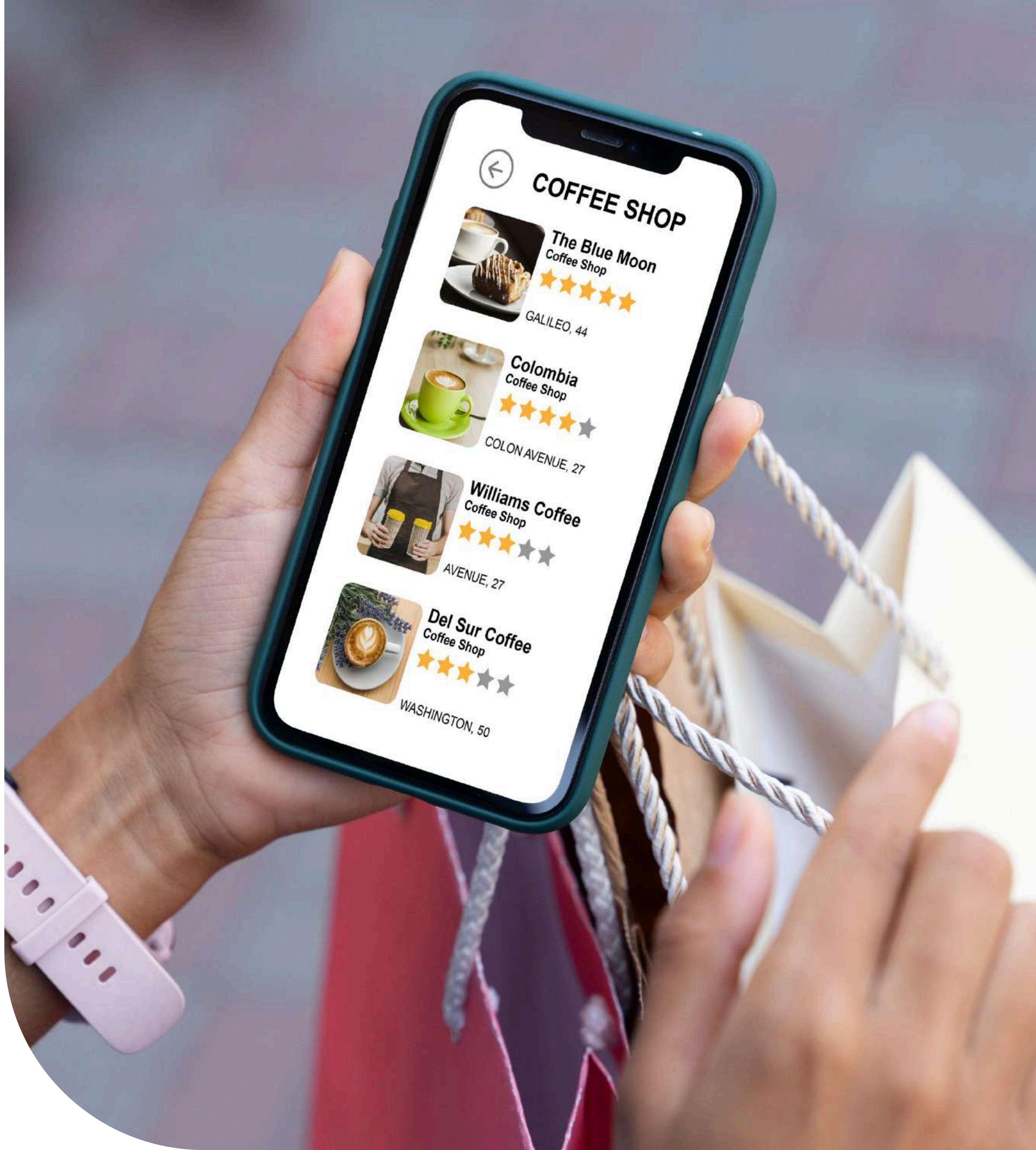
Major sporting events tend to generate high levels of social media activity, and the World Cup is no exception. In Egypt, where social platforms are already central to daily life, the tournament is expected to drive significant spikes in content creation, sharing, and engagement.

Participating in cultural moments

This creates opportunities for brands to participate in cultural moments rather than simply advertising alongside them. Timely, relevant content that connects to the emotional rhythm of the tournament, from pre match anticipation to post match celebration, tends to generate higher engagement and recall than standard campaign messaging.

A dense attention environment

The combination of late night viewing, social activity, and second screen behaviour means that the World Cup creates a dense, multi platform attention environment during the hours when Egyptian consumers are already most active.



WHAT THIS MEANS FOR SUMMER 2026 PLANNING

The fundamental dynamics of summer in Egypt remain in place:
The late night economy, the mobile dependency, the value driven mindset, and the three summer economies. What the World Cup does is intensify these dynamics and create additional windows of concentrated attention. Brands that plan for this, by extending campaign hours, preparing contextual creative, and ensuring delivery and commerce infrastructure can handle late night volume, are likely to see outsized returns during this period.

Creators are worth calling out specifically here. They give brands a way to participate in the cultural energy of the World Cup without the cost of official sponsorships or broadcast partnerships. A creator reacting to a match moment, building anticipation before a fixture, or capturing the atmosphere of a late night viewing session reaches the same audience with greater credibility and at a fraction of the investment. This works best when creators are briefed in advance and aligned to key moments in the tournament calendar rather than activated after the fact.

WHAT THIS MEANS FOR SUMMER 2026 PLANNING

How football attention and creator performance come together in Egypt is easily visible in campaign data. During a late summer campaign for **Moussy in 2025, targeting football fans aged 18 to 30 across Egypt and the GCC,** four creators generated 85 million views. The average engagement rate of **7.66%** was more than double the regional benchmark, with over **70%** of impressions landing with the intended audience.

The learning from this campaign is straightforward: audience fit and content relevance matter more than reach. With the World Cup creating that same football moment at scale, sustained across several weeks and with the added intensity of a shared national experience, the conditions to replicate that kind of performance are considerably stronger this summer. For major cultural events, what preparation matters more than reaction.

That is why it is important to have the components of a summer activation, from infrastructure to creative, ready before the moment arrives, not build during it. Summer 2026 rewards early planning.

85M
Views

7.66%
Engagement Rate

70%
In-target impressions

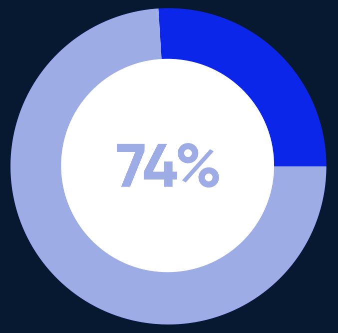
5 ECONOMIC & CONSUMER MINDSET

A VALUE DRIVEN MARKET

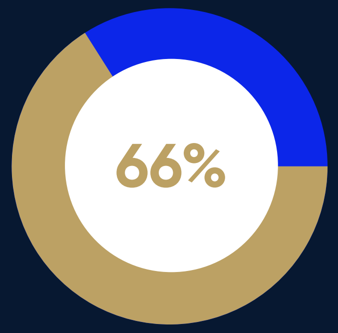
- Egyptian consumers are navigating an economic environment characterised by rising costs and increased pressure on household spending. This shapes how people approach purchasing decisions, particularly during a period like summer when spending tends to increase across categories.

- The data is clear on this. According to Ipsos Egypt (2025) and GWI Egypt (2025), **74% of Egyptian consumers plan their purchases in advance, 66% actively seek deals before buying,** and **56% wait for sales or promotional periods before making a purchase.**

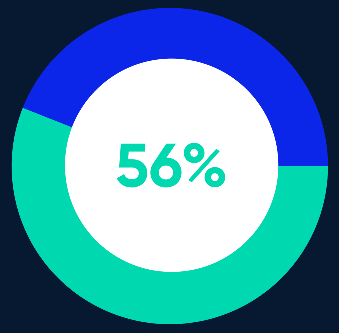
  This is a market where the consumer is deliberate. Purchase decisions are considered, researched, and timed. Impulse buying exists, but the dominant pattern is one of planning and value comparison.



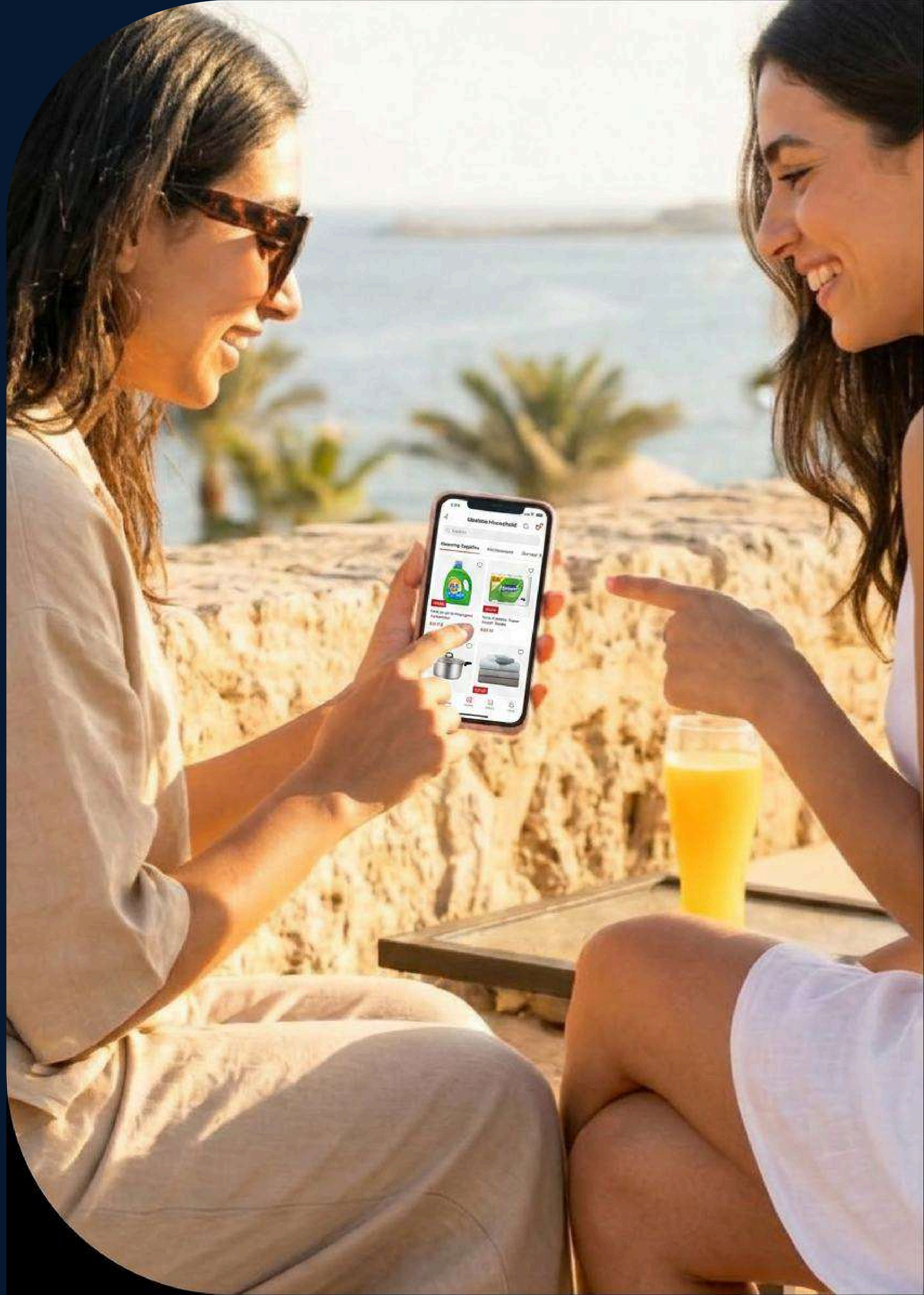
Plan Purchases in Advance



Actively Seek Deals



Wait for Sales Periods



TRUST & FAMILIARITY OVER DISCOVERY

Local brand preference

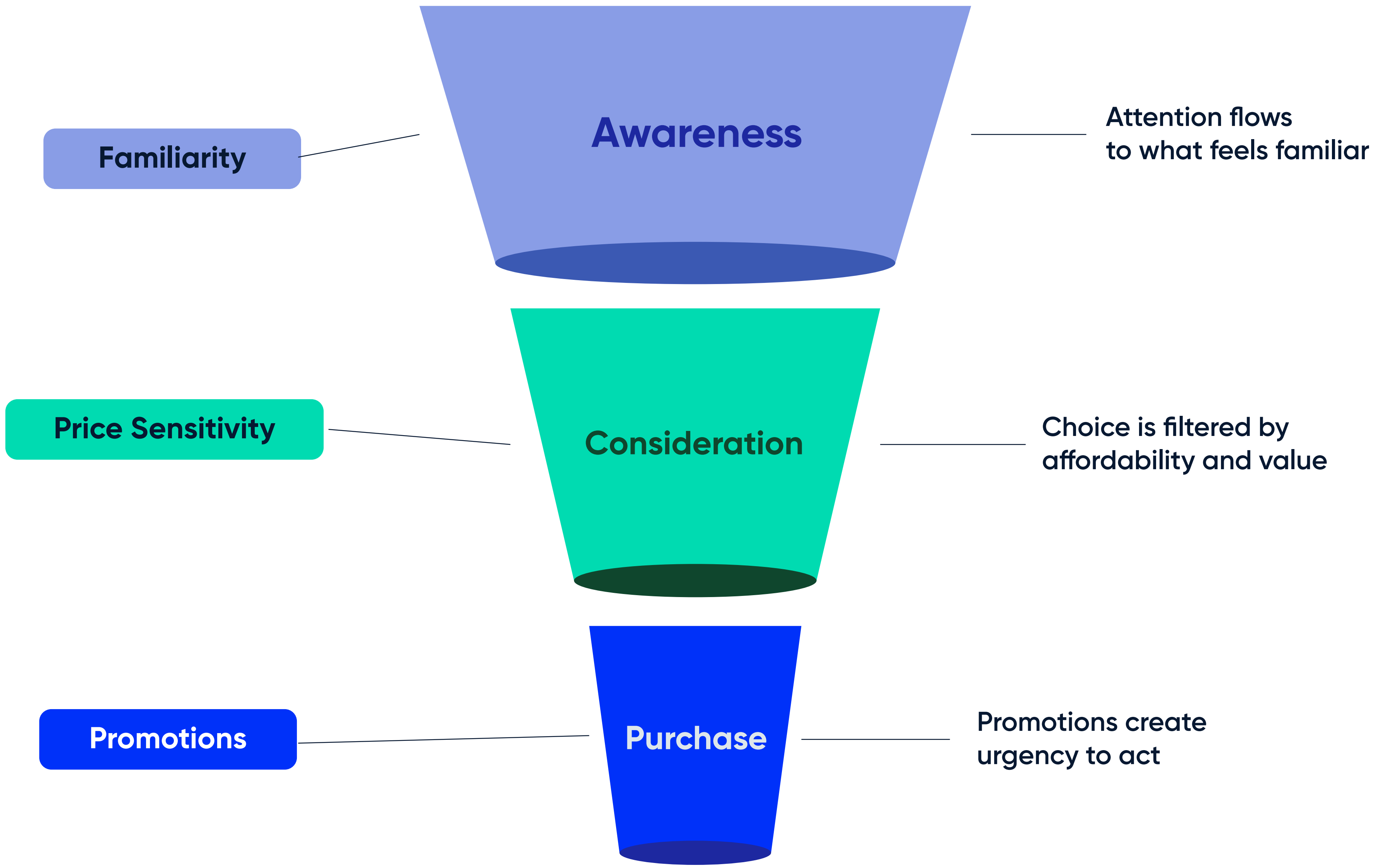
In an environment of economic pressure, consumers tend to gravitate toward what they know. GWI data shows that **72% of Egyptian consumers prefer local brands,** and broader research from PwC and Ipsos confirms a growing reliance on trusted, familiar products over new or unfamiliar alternatives.

Implications for established and new brands

The preference for familiar brands has a deeper implication that shapes how all brands, not just established ones, should approach summer. Familiarity is earned, maintained, and can erode over time. The mechanism that builds it is advertising, specifically the kind of sustained visibility that creates both mental availability (being thought of in the moment of need) and physical availability (being present in the places where purchases happen).

This reframes the commercial question. It is less about whether a brand is established or new, and more about whether it is present often enough and visibly enough to be the one the consumer thinks of and reaches for.

How Consumer Decisions Are Made in a Value-Driven Market



In value-driven markets, brands are chosen not just through discovery, but through familiarity, affordability, and timely triggers. Familiarity drives attention. Price filters choice. Promotions trigger action.

TRUST & FAMILIARITY OVER DISCOVERY

For established brands, this means that the existing relationship with the consumer continues to pay back when it is actively reinforced through consistent advertising presence. Summer, with its concentrated attention windows and elevated consumption, is one of the periods where that reinforcement matters most. Stepping back during summer tends to create space for competitors to build familiarity in the gaps.

For newer brands, familiarity can be built, but it requires commitment to frequency within a defined audience rather than reliance on a single campaign burst aimed at everyone. In our experience, breaking through in a value driven market tends to require sustained visibility within the segments a brand can realistically win, rather than chasing mass reach at the expense of the repetition needed to become familiar. Credibility, proof, and value messaging still matter, but they compound when delivered with frequency to an audience the brand has deliberately chosen.

The three summer economies outlined in this report provide a natural structure for that selectivity. A brand that chooses one economy to focus on builds genuine familiarity through repeated contact within a concentrated audience, whether that is the compound community on the North Coast, the extended stay families in Alexandria, or the digitally active in-city majority. In each case, frequency with selective reach tends to compound faster than frequency spread thinly across the whole market.

The underlying principle is the same for both incumbents and new entrants: summer in Egypt rewards brands that stay visible. High frequency presence, across the right channels at the right times, is how familiarity is built for new brands and how it is protected for established ones.

PROMOTION AS A DECISION TRIGGER

Promotions as timing signals
The preference for deals and promotions goes beyond price sensitivity. It reflects how Egyptian consumers use promotions as a signal for when to act. With **56% of consumers** waiting for sales before buying, promotions function as a timing mechanism. The consumer may already know what they want to purchase; the promotion determines when they purchase it.

Aligning with summer rhythms
During summer, when spending across categories tends to increase, this dynamic becomes particularly important. Brands that can align promotional activity with the natural rhythms of summer consumption, such as the late night shopping window, the Eid period, or the lead up to the school year, are more likely to convert the intent that already exists.

WHAT THIS MEANS FOR SUMMER PLANNING

The economic context sharpens the commercial opportunity of summer rather than reducing it. Consumers are still spending, but they are doing so with more intention and greater sensitivity to value, particularly within the mass in-city segment, where multiple pressure points such as inflation, currency fluctuations, and rising fuel costs directly influence purchasing behaviour.

Importantly, this shift extends beyond mass audiences. While higher-income segments, including North Coast consumers, remain more resilient in overall spending, their behaviour is also evolving. Rather than reducing participation, many are making more selective choices within their category, trading off between options, adjusting budgets, or seeking better value within the same lifestyle.

This reflects a broader shift across the market: consumption is not declining, but becoming more deliberate, optimised, and context-driven.
Three things tend to define strong summer performance in this environment: visibility during the right moments, messaging that leads with value and relevance, and promotional mechanics that give the consumer a reason to act now rather than later.

Summer in Egypt is a high spending period, but it is one where the consumer expects to be met with respect for their budget. Brands that understand this dynamic tend to outperform those that approach the season with premium positioning alone.

6 MEDIA AND PLATFORM DYNAMICS

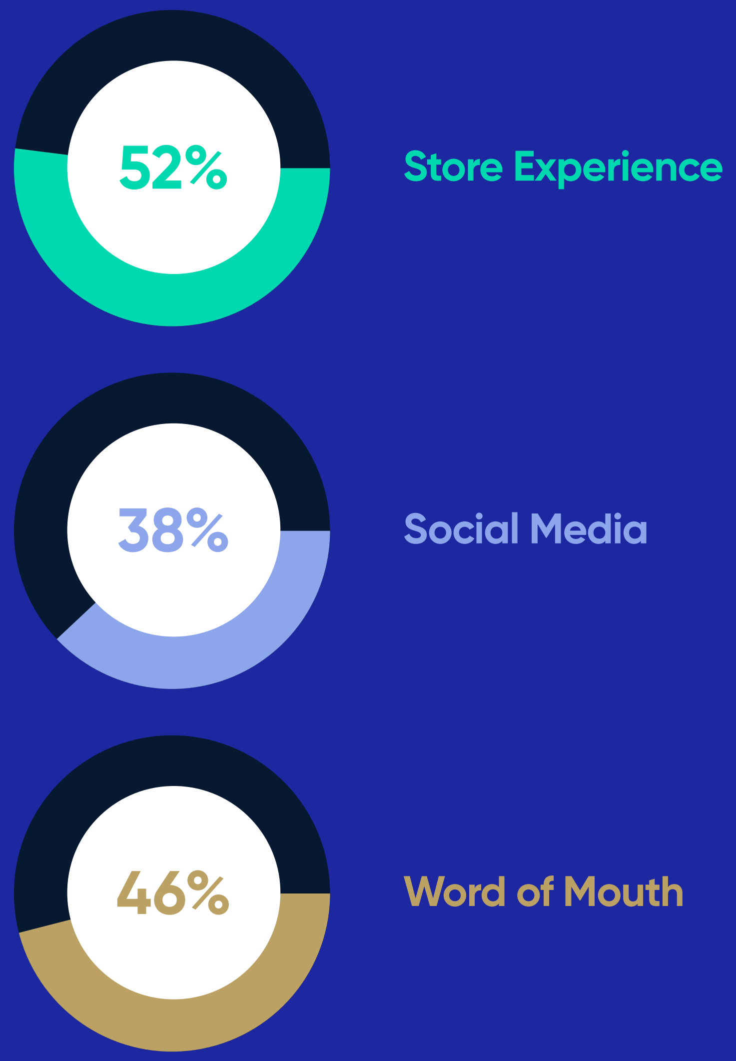
A HYBRID DISCOVERY MARKET

Egypt is a market where brand discovery happens through a combination of offline and digital channels. According to Ipsos Egypt (2025), **91% of consumers discover brands through offline touchpoints, with 52% citing in store experiences, 46% citing word of mouth, and 38% citing social media as discovery channels.**

At the same time, digital channels play a growing and increasingly active role. GWI Egypt (2025) data shows that 86% have discovered brands through paid social media advertising, **49% use social media as a research tool and a further 41% of consumers research brands more generally online.**

The result is a hybrid environment where the path from discovery to purchase moves between physical and digital touchpoints. A consumer might hear about a product from a friend, see it on Instagram, watch a creator try it on TikTok or YouTube, check for a coupon, and then either order it through a delivery app or pick it up in store. The most effective summer strategies in Egypt tend to be the ones that connect physical presence with digital reinforcement, rather than treating the two as separate media plans.

HOW DO PEOPLE IN EGYPT DISCOVER BRANDS?

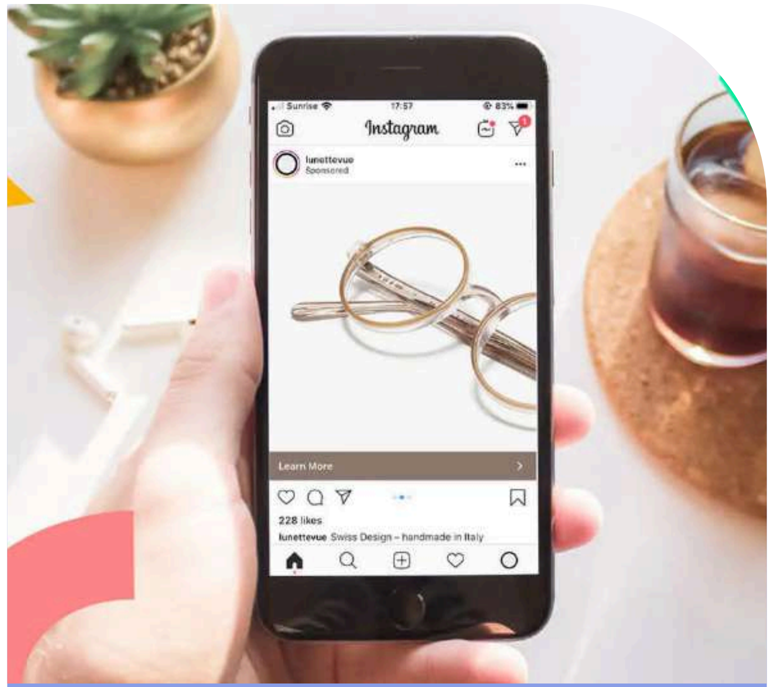


PLATFORM ROLES: FACEBOOK, INSTAGRAM, YOUTUBE AND TIKTOK

Within the digital landscape, each major platform plays a distinct role in Egypt, and these roles align with the three summer economies outlined earlier in this report.

01 FACEBOOK
Mass Reach

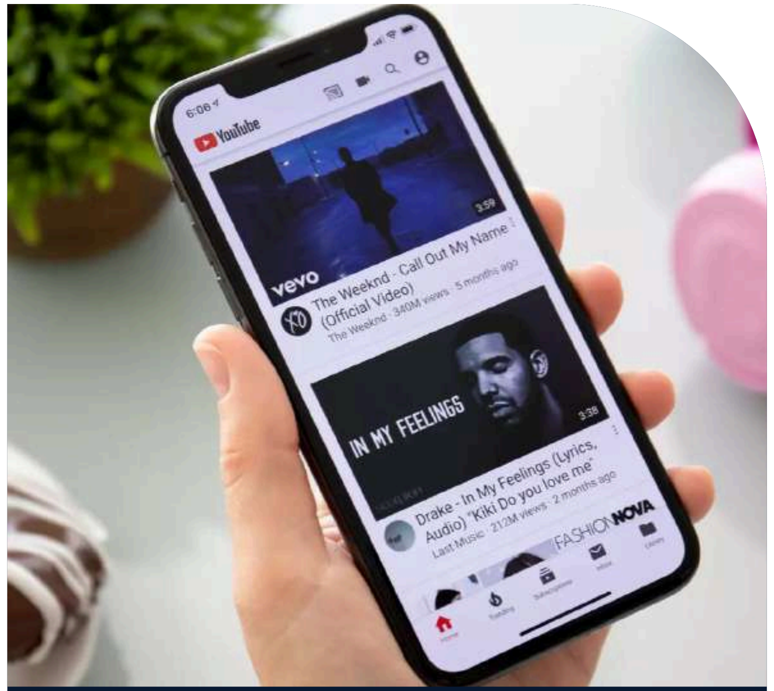
Facebook remains the mass reach platform in Egypt. GWI data shows a Facebook index of 113 among in city, lower income audiences, confirming its role as the primary social platform for the majority of the population. During summer, when the urban in city segment represents the largest audience, Facebook provides the broadest reach at the most accessible price point.



02 INSTAGRAM
Premium Inspiration

Instagram skews toward the premium segment. With an over index of 106 among North Coast audiences, it serves as the platform for aspiration, lifestyle content, and brand perception. During summer, Instagram's role is most pronounced in the visibility economy, where content creation and influencer activity are concentrated.

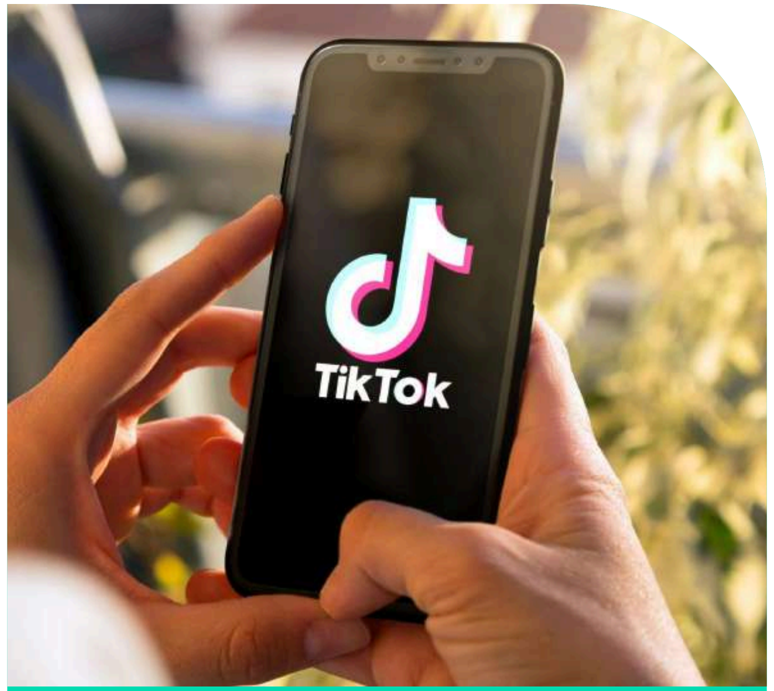
PLATFORM ROLES: FACEBOOK, INSTAGRAM, YOUTUBE AND TIKTOK



03 YOUTUBE

Scale across segments

YouTube is the strongest scale channel across all segments. With a monthly usage rate of 68% and a notable index of 106 among lower income audiences, YouTube reaches across income levels and consumption contexts. During summer, when video consumption intensifies, YouTube becomes the primary platform for reaching audiences at scale, particularly the in city majority.



04 TIKTOK

Mid/Mass Video Platform

TikTok indexes slightly above average among low to medium income audiences in the daily usage data (index 100.9), & under indexes among the higher income groups (87). In practice, this makes TikTok a strong complement to Facebook & YouTube for reaching the in city majority & the Alexandria middle income segment, rather than a premium platform in the North Coast sense.

In our experience, the most effective approach is to use each platform according to its strength rather than spreading budget evenly. Facebook for reach, Instagram for perception, and YouTube for sustained engagement at scale.

CREATORS: THE BRIDGE BETWEEN ONLINE & OFFLINE

If there is a single channel that deserves sharper focus for summer in Egypt, it is creators. Creators do three things in this market that few other channels can do together.

- **They generate credibility at the speed of culture.**
  In a value driven market where trust matters more than polish, creator content tends to carry higher weight than brand owned advertising because it arrives through a voice the consumer already follows.

- **They reach across segments when chosen correctly.**
  Premium, lifestyle focused creators land with the North Coast audience on Instagram. Gaming, comedy, and day in the life creators on YouTube and TikTok land with the in city majority and the Alexandria middle income segment. The same channel, different creator profiles, different audiences.

- **They connect the digital and physical worlds in a way that few other channels manage.**
  matters most for summer in Egypt, where so much of the commercial action moves between a phone in the evening and a physical location the following day.

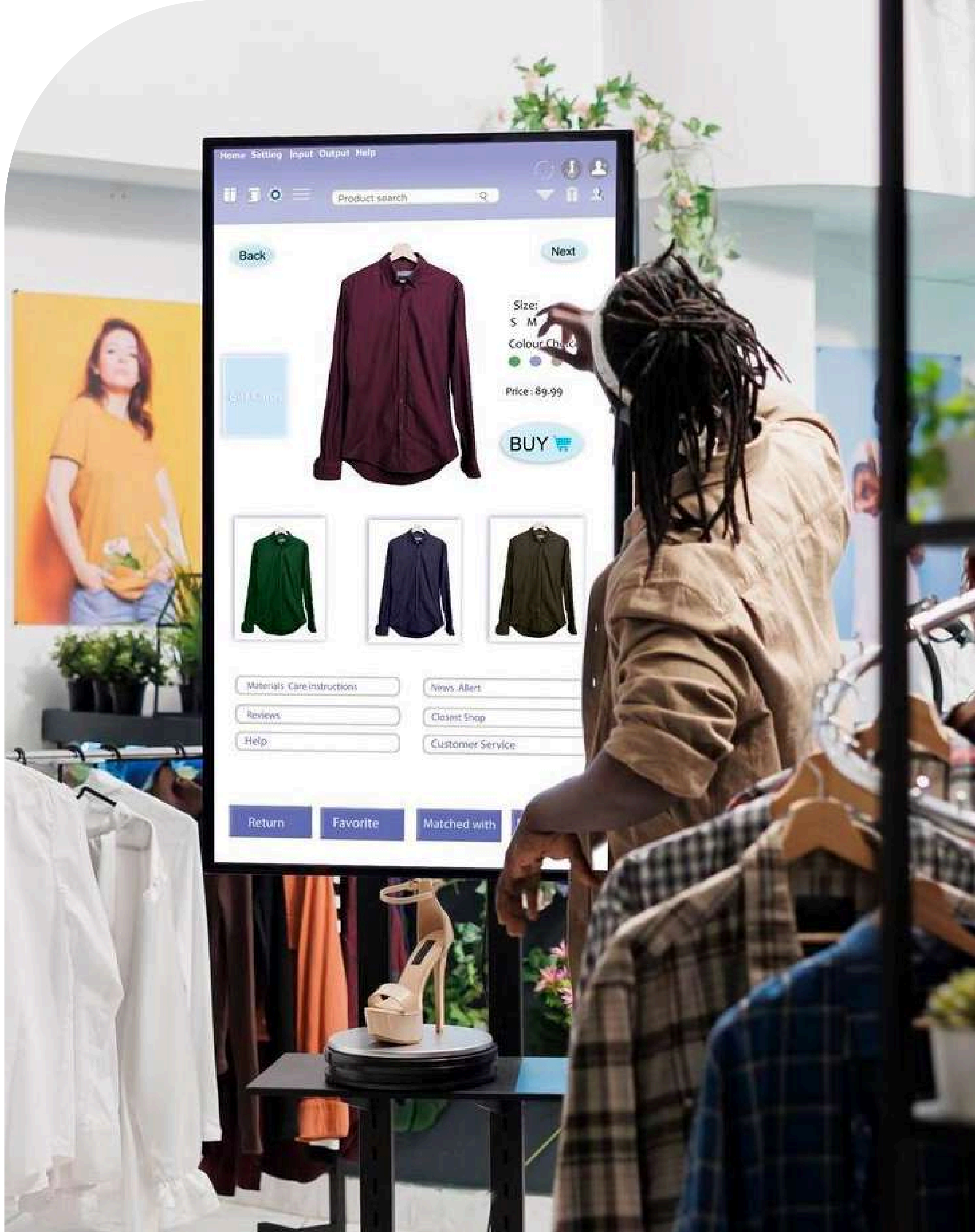
CREATORS: THE BRIDGE BETWEEN ONLINE & OFFLINE

The online to offline mechanic

The commercial pattern creators unlock for summer in Egypt is fairly consistent. Creators draw an audience online through content their followers already trust. They direct that audience into a physical experience, whether that is a pop up, a store, a restaurant, an event, or a seasonal activation. And they amplify the experience back out through content captured in the moment, which extends reach well beyond the people who attended in person.

For summer specifically, this matters for two reasons. The North Coast economy is built on visibility and social proof, which is almost entirely creator territory. The in city and Alexandria economies operate across evening phones and daytime physical visits to supermarkets, malls, restaurants, and retail, which means creators who can pull viewers off the feed and into a real location carry commercial weight that standard advertising formats tend not to.

Creator led activations also tend to travel well across platforms. The same content captured during a physical activation can be distributed across Instagram for the premium audience, TikTok for mid and mass reach, and YouTube for sustained engagement, without rebuilding the creative from scratch.



AFFILIATE, COUPONS, AND THE VALUE DRIVEN CONSUMER

The report has already established that Egyptian consumers are value driven, with 56% waiting for sales before buying and 25% only shopping online when coupons or discounts are available (Ipsos Egypt 2025). This behaviour points directly at the role of affiliate publishers and couponing platforms during summer.

Affiliate and coupon ecosystems operate where consumer intent meets the promotion that triggers purchase. In Egypt, this includes publisher networks, coupon aggregator sites, cashback platforms, and the deal led sections of delivery apps. These environments are where the value driven consumer actively searches for a reason to act, which means they carry unusually high purchase intent compared to most digital inventory.

The commercial advantage for brands is that affiliate and coupon partnerships are typically structured on a pay per sale or pay per lead basis. The brand only pays when a verified purchase happens, which aligns commercial incentives. For summer in Egypt, this makes affiliate and couponing particularly well suited to categories such as FMCG, retail, travel, food delivery, and fintech, where consumers are most actively comparing, hunting for offers, and converting on the strength of a discount rather than purely on a brand message.

In practice, the affiliate and coupon layer sits alongside creator activity and performance media. Creators generate the interest. Affiliate and coupon partners convert the interest into purchase when the consumer starts searching for a deal.

KEY TAKEAWAY: CONTEXT DRIVEN MEDIA PLANNING

Media planning for summer in Egypt rewards a context driven approach rather than a channel driven one. The question is less about which platform to prioritise and more about which audience, at which time, in which location, through which combination of touchpoints.

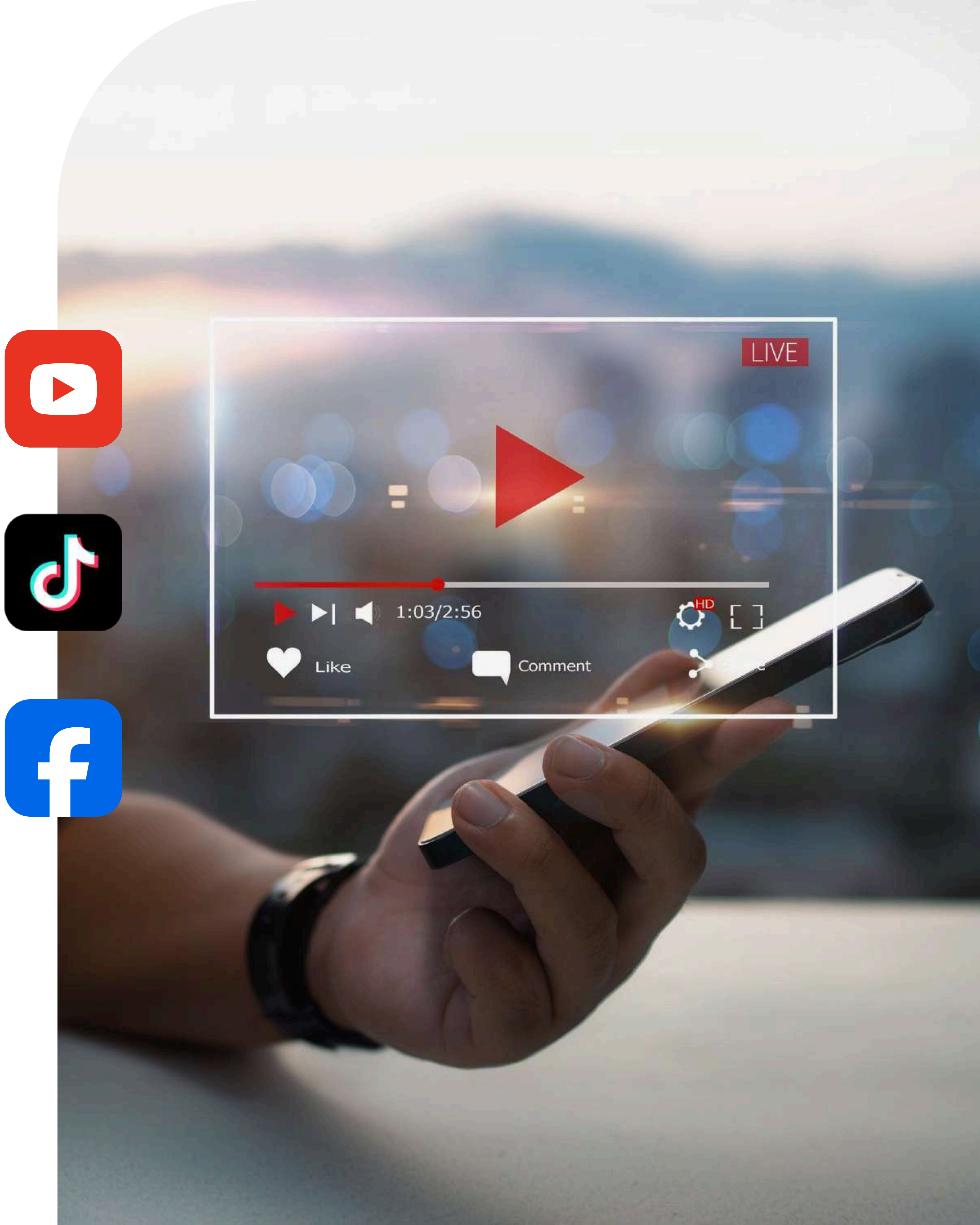
Matched to the three summer economies, the picture is as follows:

1. The North Coast segment is best reached through Instagram, premium creator content, and on ground activations.

2. The Alexandria segment responds to YouTube, TikTok, family oriented creator content, sustained frequency, and deal led affiliate activity.

3. The in city majority is most efficiently reached through Facebook, YouTube, TikTok, creator content aligned to gaming and entertainment, and affiliate and coupon partnerships that convert value seeking behaviour into verified purchases.

When these platform and channel roles are matched to the right audience at the right time, the result is a media approach that captures the full scale of the summer opportunity rather than optimising for a single segment.



7 FROM INSIGHT TO ACTIVATION

The sections above have set out the market, the behaviour, and the moment. What follows is a framework for how to activate against it.

Insight and segmentation are necessary but not sufficient. The more common failure point is execution: media plans optimised to platform metrics rather than business results, channels managed in isolation, and reporting built from numbers the platforms themselves provide. The commercial result sits one step removed from where the investment was made.

The framework in this section organises activation around three outcome levels. Brand outcomes cover awareness, consideration, and the kind of brand presence that shapes purchase decisions before a consumer is actively in market. Conversion outcomes cover the actions that signal intent: leads, app installs, post-install events, and site actions. Business outcomes cover the commercial results that appear in a CRM or sales system: orders placed, accounts opened, revenue generated. For brands where direct attribution is difficult, conversion outcomes serve as the most reliable proxy for business outcomes.

THREE ECONOMIES, ONE EXECUTION SYSTEM

The North Coast, Alexandria, and the in-city majority each need a different commercial motion, but they should not be activated as separate plans with separate reporting lines. They operate best as a connected system aligned to a shared set of outcomes.

The North Coast generates brand signals: creator content, lifestyle associations, and aspirational imagery that travels well beyond its geography. Alexandria sustains repeated consumption: it is a dwell economy where consistent presence over weeks builds genuine familiarity. The in-city majority drives outcomes at scale: the largest audience, the highest digital engagement, and the segment where most commercial results are ultimately delivered.

These three environments are most effective when activated as a connected system rather than three separate plans. The North Coast sets the brand signal. Alexandria sustains it. The in-city majority converts it into commercial outcomes at scale.

WHAT IT TAKES TO REACH EACH AUDIENCE

What follows sets out how activation plays out in practice for each segment. Where there is a meaningful difference in approach across the three outcome levels, it is called out. Where the answer is broadly the same, it is said once.

The North Coast: reaching Ahmad

The North Coast audience is real, but it is small. The segment that spends summers in Hacienda, Marassi, and similar compounds represents a narrow slice of the Egyptian population. For most national brands, it cannot carry a summer campaign on its own. Its commercial value lies elsewhere.

What this segment does exceptionally well is generate content that travels. Ahmed is not just a consumer during summer. He is a content producer and a social signal. The lifestyle he broadcasts from the coast is aspirational to the much larger audiences watching from Alexandria and Cairo. Creator content produced at North Coast locations, events, and activations lands with authenticity on Instagram, then gets amplified through YouTube and TikTok to reach the broader market. This is the mechanism worth building for.

For brand outcomes, the approach is creator led and Instagram first, with the coast as the setting rather than the audience. Macro and mid-tier lifestyle creators generate content that builds aspiration around the brand. That content is then seeded and amplified across platforms, extending its reach well beyond the compound. High impact video formats placed against contextually relevant YouTube content extend the signal into the late night viewing window that dominates both Alexandria and the city.

For conversion and business outcomes, the North Coast segment is most relevant to premium categories where the audience has both the income and the intent: travel, fashion, beauty, real estate, and financial products. Creator commerce, where creators are paid only when they drive a verified conversion, suits this segment well. The audience over-indexes for online shopping (index 142) and responds to aspirational product placement when the offer is credible. Outside of these categories, the smarter investment is to use the North Coast to build brand signals, then capture demand at scale through the other two segments.

Alexandria: reaching Dina

Alexandria is the dwell economy. Dina is not on holiday in the traditional sense. She is living her summer, for weeks at a time, in a city she knows well. Her spending is consistent and cumulative rather than celebratory. The commercial opportunity here is not a single peak but a sustained window of repeated contact and repeated purchase.

Brand outcomes are built through frequency. YouTube and Facebook are the primary reach vehicles for this segment, and the extended stay means a brand that maintains consistent presence across the summer earns genuine familiarity rather than a fleeting impression. Creator content works here when it mirrors Dina's own context: family oriented, practical, and local in feel. The credibility that makes creator content effective in Egypt comes from recognisability, not from aspirational distance.

For conversion outcomes, promotion is the trigger. With the majority of Egyptian consumers waiting for a deal before committing to a purchase, coupon and cashback partnerships that surface offers on the platforms Dina uses convert consideration into action. App based brands can sharpen this further by optimising toward post-install events that indicate genuine engagement rather than counting installs that go nowhere.

Business outcomes are strongest for FMCG, grocery, food delivery, and household categories. The combination of extended dwell time and repeat purchase behaviour means the return compounds across the summer rather than peaking at a single moment. Retail media environments, particularly delivery platforms that are already part of Dina's daily routine, reach this audience at the point of active purchase intent.

The in-city majority: reaching Omar

This is where the scale of the summer opportunity lives. Omar represents the majority of Egypt's population and the majority of its consumption. He stays in the city all summer, and summer changes his behaviour in ways that are commercially significant: later nights, more time at home, higher digital consumption, and greater reliance on delivery. This is the segment that drives volume.

For brand outcomes, Facebook is the mass reach vehicle, with a platform index of 113 for this audience. YouTube reaches across income levels, with 68% monthly usage and a notable over-index among lower income groups. Programmatic video and display build mental availability at scale across the late night window. Creator content from gaming, comedy, and entertainment creators lands well here, particularly on YouTube and TikTok, because the content mirrors how Omar actually spends his evenings.

Conversion and business outcomes converge in this segment more than in either of the other two. Paid social on Facebook and TikTok drives direct response. App based businesses can acquire users and optimise toward the actions inside the app that predict long term value, rather than measuring installs in isolation. Coupon and affiliate partnerships convert the significant share of Egyptian consumers who actively seek a promotion before completing a purchase online. For brands with measurable commercial outcomes, whether that is a completed order, a funded account, or a qualified lead, this is the segment where those outcomes are delivered at scale.

Retail and delivery platforms close the loop. Talabat, Breadfast, and Rabbit are embedded in Omar's daily routine. For brands in food, FMCG, and adjacent categories, being present on these platforms during late night hours, when demand is highest, is not optional. It is where the transaction happens.

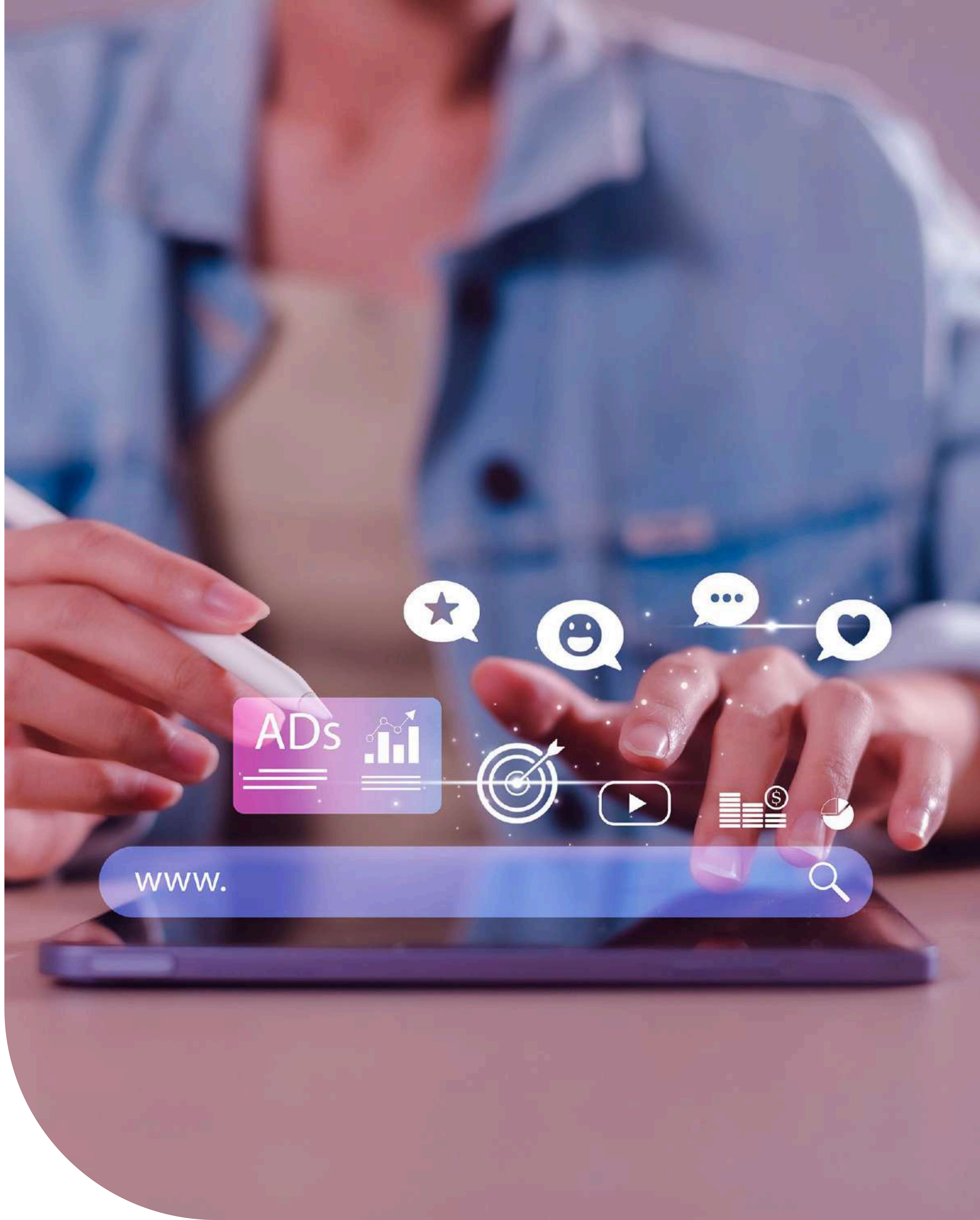
From campaigns to outcome delivery

Summer in Egypt is not a single campaign window. It is a behavioural system that operates across segments, platforms, and moments over several weeks.

Reaching consumers during the late night window requires operational readiness as much as media planning. Delivery needs to be aligned to peak hours from 9PM through the early morning. Creative needs to be built for mobile first viewing and second screen behaviour. Commerce and delivery infrastructure needs to be prepared for late night demand so that interest generated at 11PM converts rather than leaks.

Execution quality matters as much as channel selection during this period. Fraud is a structural problem in digital advertising in Egypt, as elsewhere in the region, with market averages running between 40 and 70 percent of ad spend lost to invalid traffic. Brands working with partners who operate on verified outcome models are largely insulated from this, because the incentive to deliver real results rather than reported ones is built into how they are paid. For brands that have not yet moved to outcome based measurement, summer is a reasonable moment to start: the volume of activity creates enough signal to learn quickly.

The market is large, the behavioural shifts are consistent, and the 2026 summer carries an additional amplifier in the World Cup that makes the window more concentrated than in previous years. Preparing for summer as a system rather than a campaign is what tends to make the difference when the window opens.



8 BEFORE YOU PLAN: QUESTIONS WORTH ASKING

The framework in this report is only useful if it changes how decisions get made. These are the questions worth sitting with before summer planning begins.

01

Which of the three summer economies are you actually trying to win?

The North Coast, Alexandria, and the in-city majority each require a different approach. A plan that tries to reach all three in the same way will likely underserve all of them.

02

Are your campaign hours aligned to when your audience is actually active?

If the majority of your budget is running before 9PM, a significant share of summer attention is being missed.

03

Is your creative built for the way Egyptian consumers are actually watching?

Mobile first, second screen, short form video, & late night viewing are the default conditions. Creatives built for desktop or daylight hours tend to underperform in this environment.

04

Have you mapped promotional timing to the natural rhythms of the season?

Egyptian consumers tend to wait for a reason to act. Promotions aligned to the late night shopping window, the World Cup calendar, and the lead up to the school year are more likely to convert existing intent than those timed to internal campaign schedules.

05

Are you measuring outcomes or platform metrics?

The two are not the same. If your reporting is built from numbers the platforms themselves provide, the commercial result of your investment is one step removed from what you can actually see.

06

Do you have creators briefed and ready for the World Cup window?

The brands that participate in that cultural moment authentically will be the ones whose creators were aligned to key fixtures in advance, not the ones reacting after the fact.

07

Is your delivery and commerce infra-structure ready for late night demand?

Interest generated at 11PM needs somewhere to go. If the operational layer is not prepared for peak hours, the media investment leaks.

Summer in Egypt is one of the largest concentrated windows of consumer attention the market produces each year. It reshapes how people spend, what they watch, when they are reachable, and what influences their decisions. That shift happens whether brands plan for it or not. The window is an opportunity for virtually every brand. What differs is who enters it with a clear view of the market, a plan built around the right audiences, and the execution infrastructure to convert attention into outcomes. That is what this report was built to help with.

SUMMER IN EGYPT 2026

Summer as a Nationwide Behavioural Shift

PLATFORMANCE™