

SHOPPING SEASON REPORT · 2026

THE RETURN OF THE DEAL CATCHER

Same wallet, sharper timing

How shoppers across MENA time their spending through the year, with a closer look at Q4.



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REINTRODUCING THE DEAL CATCHER

Last year's Q4 report introduced the deal catcher: a shopper with a budget, a plan that bends and a nose for value.¹ They head into a sale season knowing roughly what they can spend, but not always what they will spend it on. They research early, compare as they go and park products in their cart until the price feels right. Three ideas from that report still hold.

1

Share of wallet

The deal catcher has one budget, and every category is competing for it. A perfume brand is up against a games console or a new air fryer as much as against another perfume. A sale season changes where the money goes more than how much there is.

±3%

Weekly card spending in Saudi shops in Q4, against the rest of the year²

2

Discounts, used selectively

Shoppers expect a deal in a sale season, but they don't hold a fixed percentage in mind. That gives brands room to be smart about it. Escalate discounts on slow moving stock rather than marking down across the board. Offer smaller discounts to loyal customers who would buy anyway. And launch the key offer early, to convert fence sitters on smaller ticket items before the noise of the big sale days.

3

Planned and flexible spend

Flexible spend is the purchase that was never on the list: a deal or a discovery triggers it, and shoppers end up spending more than they planned. **Planned spend** was on the list long before the season. Shoppers research it, compare it and wait for the right price. The discount still matters, but it decides which brand they buy, not whether they buy.

[Two shoppers show the difference →](#)

TWO SHOPPERS, TWO KINDS OF SPEND



Mariam, flexible spend

➤ An illustrative composite

Mariam has no plans to buy anything in the middle of November. Scrolling on her lunch break in Dubai, she watches a creator she follows unbox a perfume gift set at a discount. Ten minutes later she has bought it, along with a lipstick she spotted on the same page. Neither was on a list. The discovery and the deal did the work, and her budget took a hit she did not see coming.



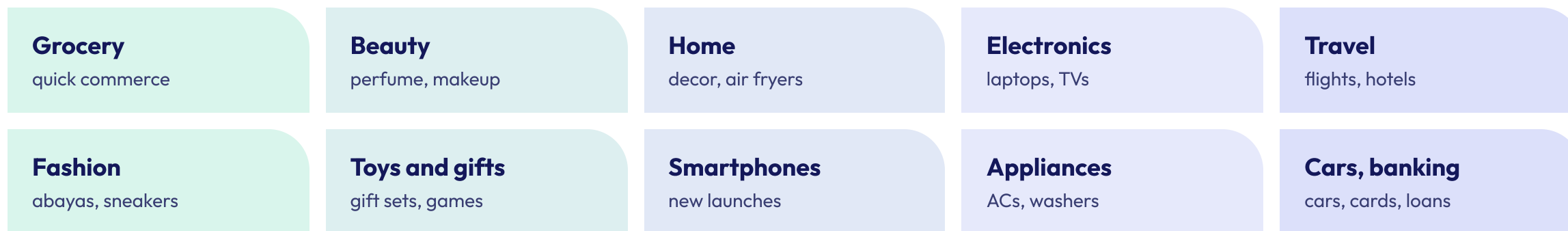
Khalid, planned spend

➤ An illustrative composite

Khalid has known since the summer that he wants a new TV for the family majlis in Riyadh. In September he reads reviews and watches YouTube comparisons. By November he has a shortlist of two. He parks both in his cart and waits. His salary lands on 26 November. On White Friday, the next day, one of them drops in price, and he buys it. The discount did not make him buy a TV. It decided which TV he bought.

EVERY CATEGORY SITS SOMEWHERE BETWEEN IMPULSE AND PLAN

Most categories sit somewhere between Mariam's perfume and Khalid's TV. The job is to know where your products sit on the spectrum, then either spark the unplanned purchase or back up the planned one.



Flexible spend

A deal or a discovery triggers the buy

Planned spend

Research first. The deal tips the choice.

WHAT THIS YEAR'S REPORT ADDS

Last year:
how they think

This year:
when they buy

This report looks at the deal catcher's spending pattern across the month, and at how brands can plan around it, with a closer look at Q4.

ABOUT OUR DATA

This report draws on Platformance's own campaign data across affiliate, creators, retail media and search, alongside Saudi Arabia's national card spending. All our own figures are indexed, and no brand is named. "The typical brand" is the middle brand in our data: a few large brands can move a total on their own, so we report what the brand in the middle experienced.

Source	What it covers	Markets	Period
Affiliate	Coupon and tracked link orders from 116 brands, with daily orders through Q4 for 28 brands in 2024 and 24 in 2025 ³	Saudi Arabia, UAE, Egypt	Jan 2024 to May 2026
Card spending	National weekly point of sale spending in shops ²	Saudi Arabia	Jan 2024 to Oct 2026
Search	623 search terms in English and Arabic ⁴	UAE, Saudi Arabia, Egypt	2024 and 2025 seasons
Retail media	Sponsored listings on marketplaces and quick commerce apps ⁵	UAE, Saudi Arabia, wider GCC	Oct 2025 to Sep 2026
Creators	140 creator campaigns for 44 brands, plus 28K posts from creators' own accounts ⁶	GCC, Egypt	2024 to 2026

Section 2

THE DEAL CATCHER'S YEAR: PAYDAY, THEN THE WAIT

Before Q4, the rhythm that runs through every month.



PLATFORMANCE

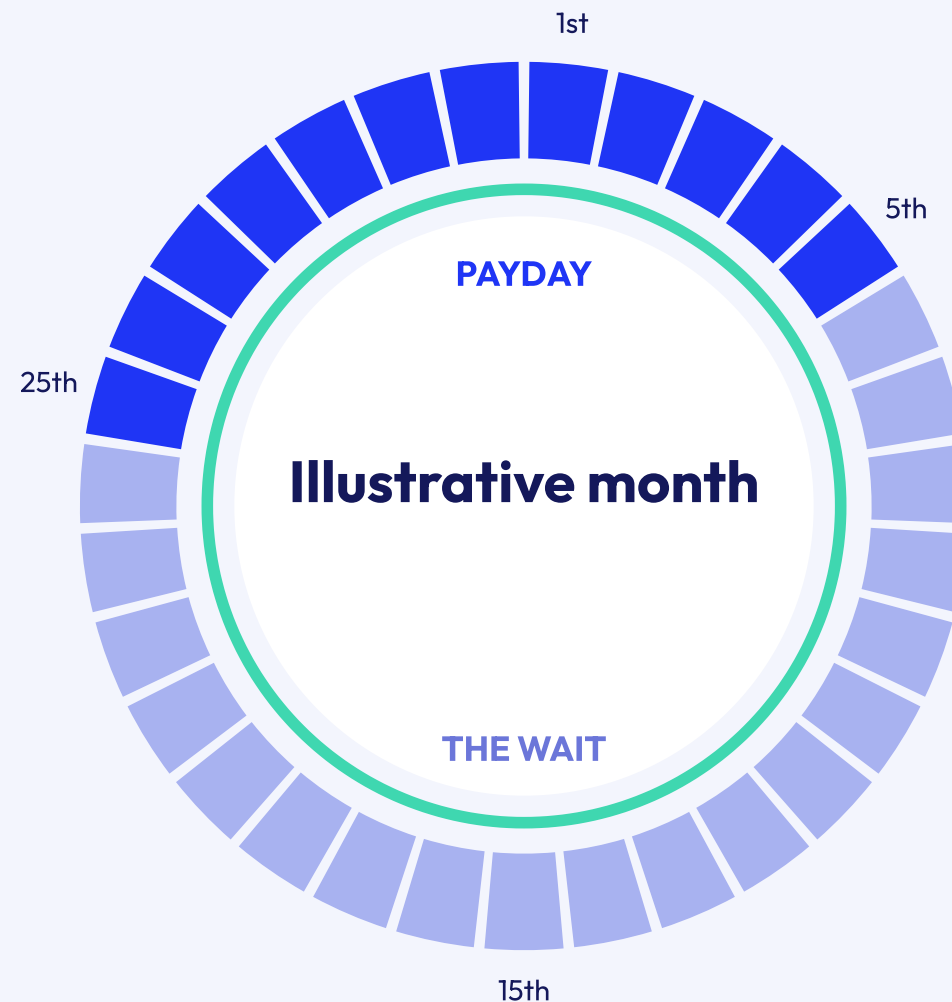
The Return of the Deal Catcher

SPENDING RISES AT PAYDAY AND FALLS BACK IN BETWEEN

The deal catcher shops to a rhythm, and it repeats every month. Spending rises at the turn of the month, from the 25th to the 5th, when salaries land in Saudi Arabia and the UAE.^{7,8} We call this window **payday**.

For the rest of the month, from the 5th to the 25th, spending falls back while shoppers keep watching, searching and comparing. We call that **the wait**.

-  **Payday**, the 25th to the 5th: the wallet refills
-  **The wait**, the 5th to the 25th: spending falls back
-  **Attention** holds all month



THE RHYTHM RUNS ALL YEAR. Q4 TURNS IT UP.

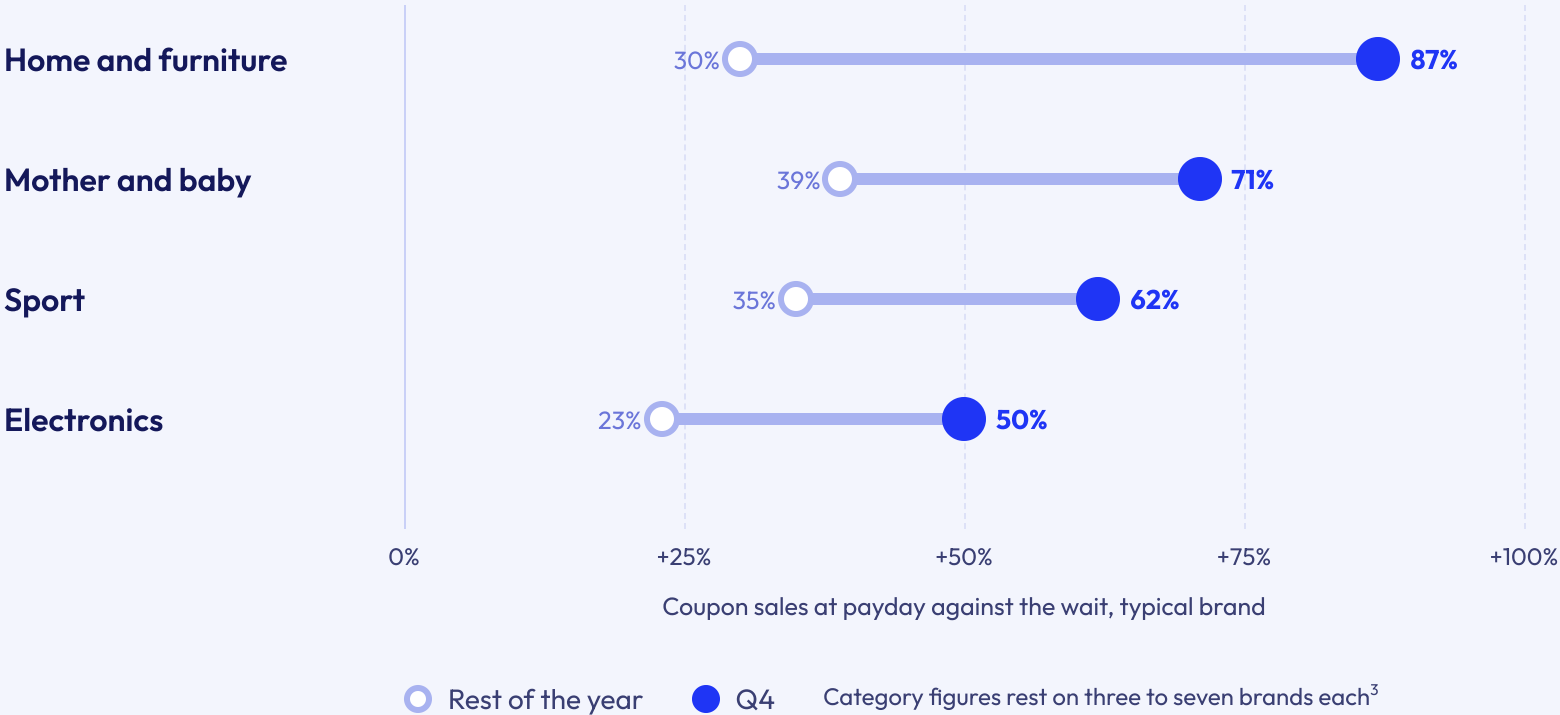
The rhythm isn't only a Q4 story. It shows in every quarter of the year, in Saudi Arabia and the UAE alike, and Q4 turns it up.³ Each wave shows how far payday sells above the wait for the typical brand. The lift is there in every quarter, with or without a sale event.



Coupon sales at payday against the wait, typical brand, by quarter, January 2024 to May 2026³

BIGGER, PLANNED PURCHASES WAIT FOR PAYDAY

The lift is strongest where the basket is biggest. Brands with a typical order above \$40 rise most at payday, and Q4 sharpens that most in home and furniture, mother and baby, sport and electronics.³



KHALID'S TV, MEASURED

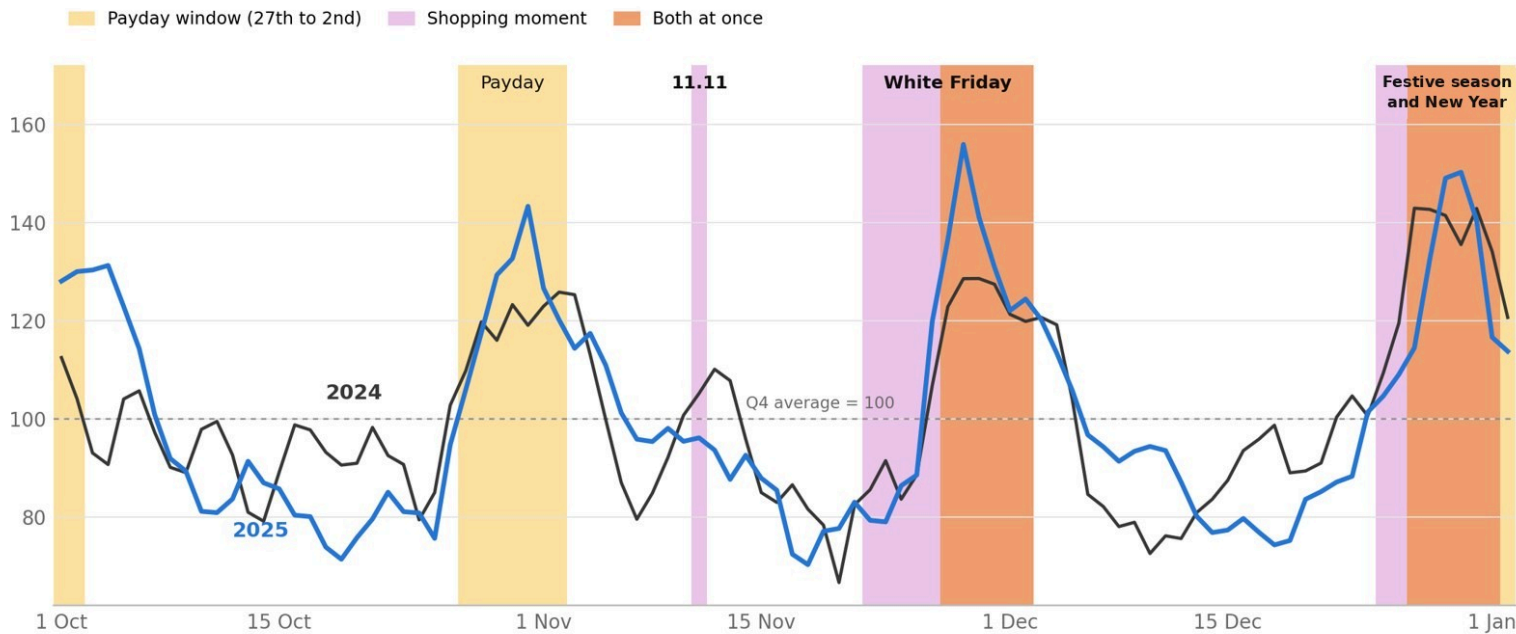
The purchase on the list waits for the salary and the deal to arrive together.

Q4: THE SAME RHYTHM, TURNED UP

Q4 is payday and the wait with the volume turned up. Most brands saw a stronger payday lift in Q4 than in the rest of the year, and the lift holds even with 11.11, White Friday week and the year end taken out.³ The sale events add to the rhythm. They don't replace it.

Q4 has a pulse, and it beat on payday two years running

Daily coupon orders for the typical brand, Q4 2024 and Q4 2025, three day rolling average.



Analysis of PulsR (affiliate) data: 28 brands with daily orders across Q4 2024 and 24 across Q4 2025, mainly Saudi Arabia and the UAE. Coupon and tracked link sales only. Each brand's daily orders are set against its own surrounding month, so growth across the quarter does not tilt the line. White Friday is shown 22 November to 2 December. Paydays follow the Saudi government payday on the 27th, with the window running to the 2nd. Days before a brand's campaign started or after it ended are left out, not counted as zero.

Chart 1. Q4 has a pulse, and it beat on payday two years running. Daily coupon orders for the typical brand, Q4 2024 and Q4 2025.³

Payday against the wait

+17% vs **+38%**

Rest of the year vs Q4

29 of 41

brands with a stronger payday lift in Q4³

10 of 10

best days of each Q4 fell at payday³

CARD SPENDING SHOWS THE SAME RHYTHM

Saudi Arabia's national card spending, across every sector and every shop, rises and falls in the same Q4 weeks as our online coupon sales.

Weekly card spending peaked at every month end in 2024 and 2025, and the gap between payday and the wait grew from one Q4 to the next.²

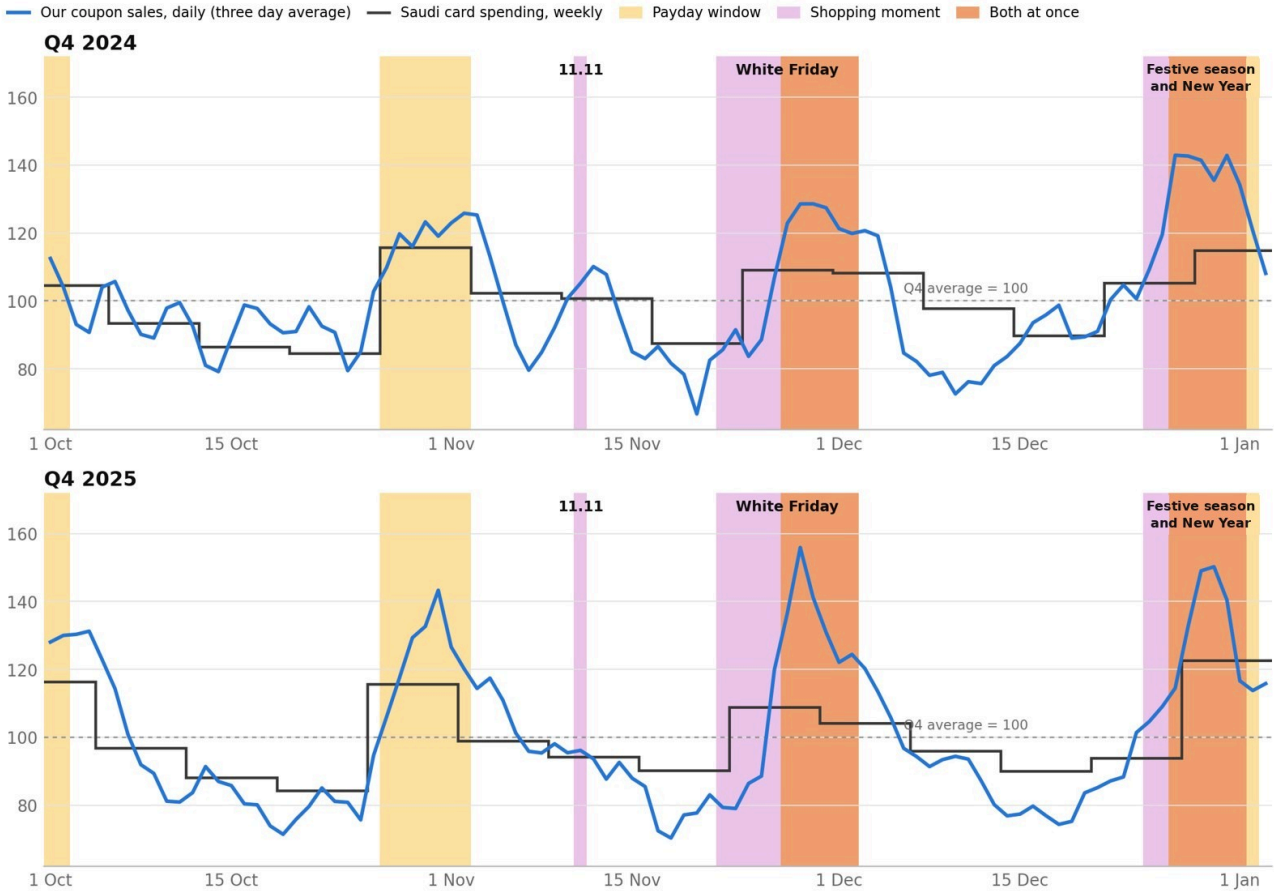
IN THE UAE

+31% Visa card spending in the November peak week, against 36% in Saudi Arabia¹⁰

Google and Visa data show deal searches up 69% in the same week. Shoppers search in the wait and spend when the peak arrives.¹⁰

Same pulse, two sources, two seasons

Our coupon sales day by day against Saudi card spending week by week, each indexed to its own Q4 average.



Sources: analysis of PulsR (affiliate) data, typical brand across 28 brands with daily orders in Q4 2024 and 24 in Q4 2025. Each brand's daily orders are set against its own surrounding month, so the growth of our network does not tilt the line. Days before a brand's campaign started or after it ended are left out, not counted as zero. Saudi Central Bank (SAMA) weekly point of sale reports, in store card spending, weeks ending Saturday; SAMA publishes weekly only. One December 2025 week is estimated from the reported change, and the last is approximate. White Friday is shown 22 November to 2 December; the payday window runs from the 27th to the 2nd.

Chart 2. Our daily coupon sales against Saudi Arabia's weekly card spending, Q4 2024 and Q4 2025. Sources: analysis of PulsR (affiliate) data;³ Saudi Central Bank (SAMA) weekly point of sale data.²

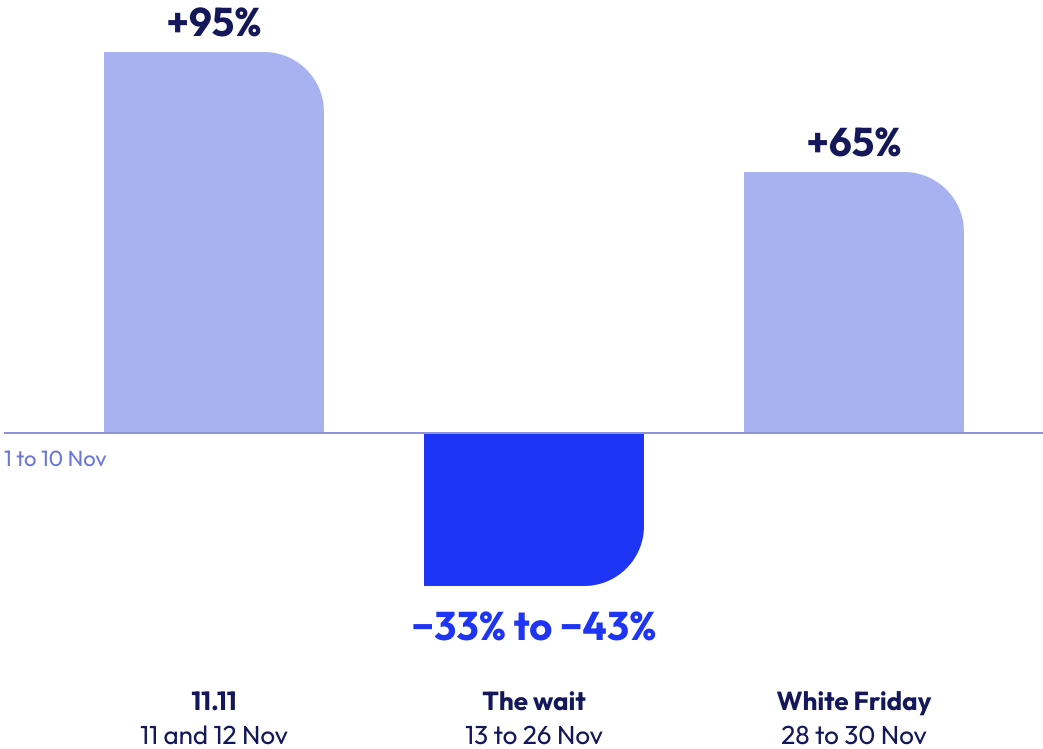
11.11 DEPENDS ON THE CATEGORY

Market totals for 11.11 are driven by the biggest sellers, and they hide how the typical brand does. 11.11 falls in the wait, and for the typical brand in our data it sold below the weeks around it in both years.³ Saudi card spending agrees.²

Fashion is the exception. It has one of the weakest payday rhythms we track, and its season is the events: on a leading online marketplace, fashion sales almost doubled on the day.⁵

Fashion shoppers buy on 11.11, wait, then come back for White Friday

Fashion sales per day on a leading online marketplace, November 2025, against 1 to 10 November



Source: analysis of RADIUS (retail media) data, November 2025⁵

NOVEMBER'S WAIT IS THE DEEPEST OF THE YEAR

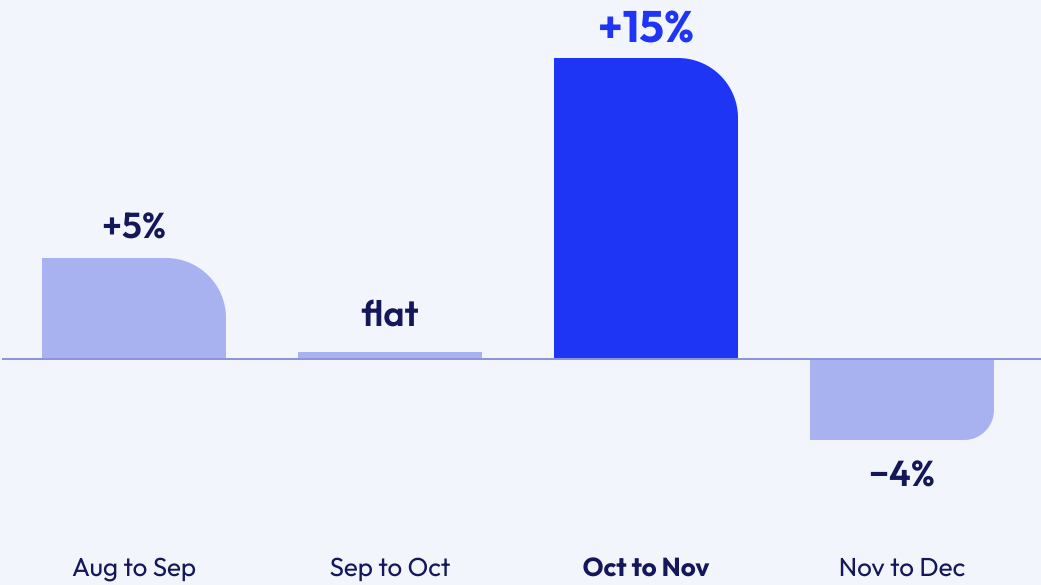
After 11.11, sales fall back for close to two weeks, in our coupon data, on retail media and in Saudi card spending alike.^{2, 3, 5} For one fashion advertiser, sales fell by more than a third while ad spend held steady.⁵

Shoppers aren't idle in the wait. On Google, searches for deals ("White Friday", "offers", "discount code") were flat from September to October, then rose 15% from October to November, with four in five deal searches rising. The pattern held in 2024 and 2025, in the UAE, Saudi Arabia and Egypt alike.⁴

- UAE
- Saudi Arabia
- Egypt

Deal searches jump from October to November

Month on month change in Google deal searches, median keyword, UAE, Saudi Arabia and Egypt, 2024 and 2025

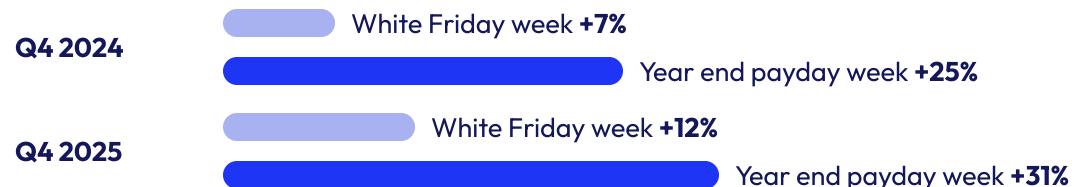


Source: Google search data via Ahrefs, Platformance analysis, deal keywords in English and Arabic⁴

The season runs to the year end

The December payday, as it meets the festive season and New Year, sold more strongly than White Friday week as a whole in both seasons. And sale days bring more orders rather than bigger baskets: in White Friday week, the typical basket stayed close to October's.³

Sales against the weeks around them, typical brand



Source: analysis of PulsR (affiliate) data³

WHAT THIS MEANS FOR MARKETERS

Plan for the rhythm as well as the events. Use the wait to reach and persuade shoppers while they are still deciding.

Put the selling budget on payday, when the wallet refills, and above all where payday and a sale event meet.

Treat 11.11 as a category decision, and stay in view through November's wait.



SECTION 4

THE WAIT BELONGS TO CREATORS

The wait covers most of the month. Sales are lower, but shoppers haven't stopped: they are watching, searching and deciding what to buy when payday comes. For brands, the wait is the time to win a place on that list, and creators do that best.

Attention holds while sales wait. Across 28K posts on creators' own accounts, views in the wait run as high as views at payday, in Q4 and at every other time of year.⁶ A creator's fee is the same whichever day the post goes live, so the wait is when creator content does its most valuable work.



Flexible content travels, planned content goes deep. Creator content works differently at each end of the spectrum. Flexible spend content reaches more people. Planned spend content reaches fewer, but draws twice the response, and shoppers give more time to videos that explain a product properly. Mariam's perfume works in a short video. Khalid's TV needs the longer review.⁶

Reach, as share of followers

Flexible spend  28%

Planned spend  3%

Responses per 1,000 views

Flexible spend  23

Planned spend  48

Responses per 1,000 views, by length

30s or less  16

Over a minute  38

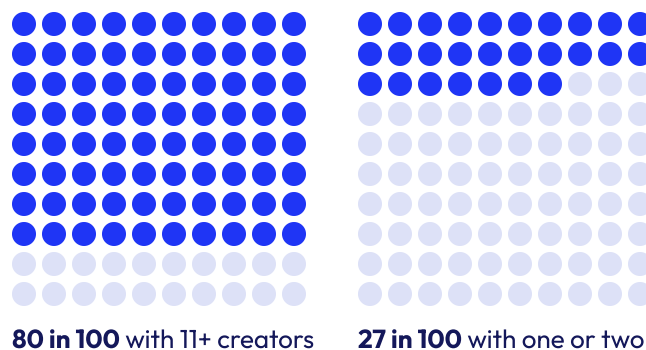
Flexible spend: food and restaurant posts. Planned spend: bank, telecoms, airline and car posts. Source: analysis of PerformR (creator) data⁶

CREATORS BUILD DEMAND AND MOVE PRODUCTS ONTO THE SHORTLIST

Most creators work in persuasion. They put a product in front of shoppers who were not looking for it, give them a reason to want it, and move it into the set of options they will choose from when payday comes.

Creator marketing is a numbers game

80% of campaigns with 11 or more creators produced a post with more than 100K organic views, against 27% of campaigns with one or two. The top 10% of posts drove 67% of organic views.⁶ The breakout post is hard to predict, so the number of creators matters more than the choice of any single one.



Creators drive demand that checkout tracking doesn't see

Coupon tracking credits the code entered at checkout, and deal sites are built to be the last step. A shopper who found the brand through a creator and then used a deal site's code shows up as a deal site sale. Creators start the purchase, deal sites complete it, and the report credits the last step.³

15x

coupon orders credited to each deal site, against each creator

3%

of coupon orders credited to creators

Same

spend per order as a deal site's shopper³

WHAT THIS MEANS FOR MARKETERS

Keep creators live through the wait rather than switching them on for event days.

Match the content to the category: short and frequent for flexible spend, longer reviews for planned spend.

Book enough creators to find the breakout post, and judge demand creators on the demand they build rather than the sales the checkout credits to them.

CREATORS PLAY TWO ROLES: BUILDING DEMAND AND CONVERTING IT

Not every creator does the same job. Most build demand through the wait. Others work like a deal site with a following: paid after the sale, on a code or tracked link, they help convert that demand when payday comes. Both have a place, and they are planned and judged differently.

Demand creators

Persuasion layer

The job. Put the product in front of shoppers who weren't looking, and move it onto their shortlist.

When. Through the wait, live before each payday.

How they're paid. Up front, for content and reach.

How to judge them. Reach, response, and the searches and sales that follow, wherever the checkout credits them.

Conversion creators

Conversion layer

The job. Turn interest into orders, often deal finders whose followers come for the offer.

When. At payday and in sale windows.

How they're paid. After the sale, per order, on a code or tracked link.

How to judge them. Sales and cost per sale, like any other conversion partner.

Creator codes keep the same clock as deal sites

Coupon sales at payday against the wait

Rest of the year

Creator codes  +12%

Deal sites  +16%

Q4

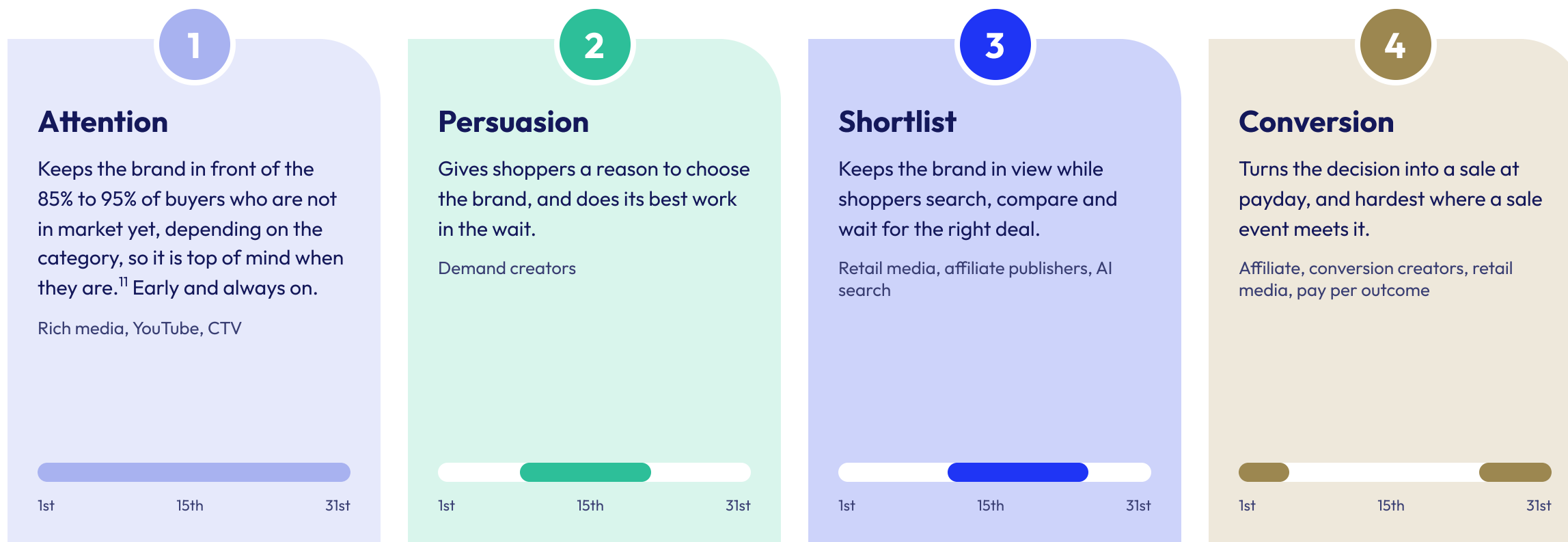
Creator codes  ~40%

Deal sites  ~40%

A creator's shopper also spends the same per order as a deal site's shopper.³

THE KEY TO CATCHING THE DEAL CATCHER: FOUR LAYERS

Attention builds future demand. The other three layers capture the demand in market today, and each has its place in the month. The pattern holds for any shopping month. Q4 makes it louder. The strip on each card shows when the layer works hardest, from the 1st to the 31st.



EACH LAYER, ITS CHANNELS, AND WHAT CHANGES IN Q4

1 Attention: rich media, YouTube and CTV

Rich media works on both ends of the spectrum: try ons and lookbooks for flexible spend, comparison tools and product demos for planned spend. YouTube places the brand next to the reviews and comparisons shoppers watch while they research, and CTV brings reach for the planned purchase.

In Q4: use the same formats ahead of White Friday for teasers, countdowns and the offer reveal, and rerun the creator videos that are already working.

2 Persuasion: demand creators

Creators do their best work in the wait, when the audience is watching but not yet buying. Keep them live through the month: deal finders for flexible spend, expert reviewers for planned spend.

In Q4: book enough creators to find the breakout post, and brief them early enough to be live before each payday.

3 Shortlist: retail media, affiliate publishers and AI search

Sponsored listings put the brand where shoppers search with intent, review and comparison publishers carry the content they read before they decide, and AI search increasingly draws on that same content to answer shoppers' questions. All three need to be live through the wait, at lower bids, so the brand is on the list when the wallet refills.

In Q4: start early, while clicks cost less. Each retail media sale cost about a third more in November than in October.⁵ Book the top coupon publishers early too: a short list of them drove 80% of coupon orders in Q4 last year.³

4 Conversion: affiliate, conversion creators, retail media and pay per outcome

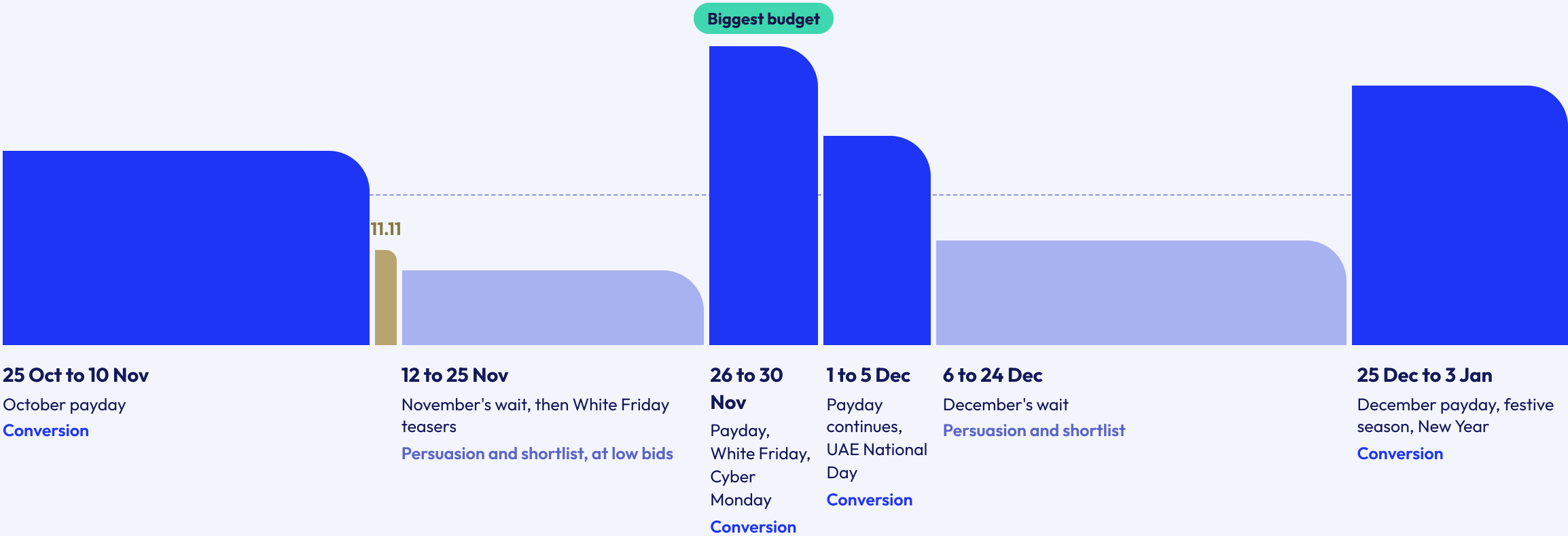
Deal sites, conversion creators, codes, and product page and storefront placements should be strongest at payday. Affiliate paid per sale and pay per outcome campaigns tie spend to the result, and cost nothing on the days nobody buys, so they can stay live through the wait while bid based spend is held for payday.

In Q4: the peaks are predictable. What decides results is having scalable channels live to capture conversion intent at its highest.

Q4 2026: WHAT TO DO NOW

We are entering the heart of Q4. Each block is a period of the rest of the quarter, as wide as it lasts and as tall as it sold for the typical brand in the last two seasons. The colour is the layer that leads.

- Conversion
- Persuasion and shortlist
- Conversion for fashion only



Q4 2026: WHAT TO DO NOW

1

Start before the October payday

The October payday is next, and clicks cost less now than they will in November.⁵ Put attention and persuasion to work now, and have deal sites live for the end of the month.

2

Brief creators by 5 November for White Friday, and by 5 December for the year end

Book enough of them to find the breakout post, and have them live through the wait before each payday.

3

Treat 11.11 as a category decision

For fashion, it is a conversion day. For most other categories, focus conversion on 26 to 30 November.

4

Stay in view through November's wait

Keep creators, sponsored listings and deal site placements live from 12 to 25 November at lower bids, so the brand is still on the shortlist when the shopper comes back.

5

Have partners live that can scale at each payday

Demand rises sharply from 26 to 30 November, when payday and White Friday land together, and again at the year end. Make sure the channels and partners that convert, such as affiliate and pay per outcome, are live and able to scale to capture it, into the first days of December and January.

SECTION 7

LOOKING AHEAD: THE YEAR AFTER Q4

Q4 is the loudest version of the rhythm, but the rhythm runs every month. Four steps carry the lessons of this report into 2027.



01

Plan by the month, not only by the event

Set every month's budget around its payday and its wait, then add the events on top. A sale event that meets a payday is worth more than one that doesn't.

02

Start the next season early

The next big shopping season, Ramadan 2027, is expected to begin around 8 February.⁹ The same four layers apply: attention and persuasion in the weeks before, conversion when spending peaks.

03

Keep a creator bench running all year

A standing group of creators, briefed monthly and live through each wait, finds the breakout post more often than a few creators booked for an event, and keeps the brand in consideration month after month.

04

Measure beyond the checkout

Coupon tracking credits the last step. Read creator and attention results alongside deal site sales, and favour partners that tie spend to the outcome you need, whether that is a sale, a lead or an install.

**The deal catcher spends their wallet on a predictable schedule:
payday, then the wait. The brands that stay in view through
the wait are the ones on the list when the salary lands.**

Same wallet, sharper timing.

SOURCES AND METHODS

1. Platformance, "The Q4 Shopping Season: Catching the Deal Catcher", 2025. Last year's edition of this report.
2. Saudi Central Bank (SAMA), weekly point of sale reports, January 2024 to October 2026. In store card spending in Saudi Arabia, all sectors. Each week is compared with the eight weeks around it. The payday week is the week holding the 27th, or the week after when that is higher, and the payday gap compares it with the quietest week between the 7th and the 25th.
3. Analysis of PulsR (affiliate) data, January 2024 to May 2026. Coupon and tracked link orders from 116 brands in Saudi Arabia, the UAE and Egypt. Payday means the 25th to the 5th, and the wait the rest of the month. Payday lift figures compare payday with the 11th to the 20th, the quietest stretch of the wait. The comparison of Q4 with the rest of the year covers 566 brand months with daily orders across 70 brands, with Ramadan and Eid months set aside. Q4 timing comes from the 28 brands with daily orders throughout Q4 2024 and the 24 throughout Q4 2025.

Each day is compared with that brand's average for the 31 days around it, so growth in our network doesn't flatter later months, and the typical brand is the middle brand. The two seasons are lined up on their paydays and on Black Friday. Basket groups use each brand's average order value. Category figures rest on three to 16 brands each. Days before a brand's campaign started or after it ended are left out. Covers coupon and tracked link sales only, so sitewide discounts with no code are not captured, and brands that restrict codes on White Friday would understate that peak.

4. Platformance analysis of Google search data via Ahrefs, the UAE, Saudi Arabia and Egypt, English and Arabic, 2024 and 2025 seasons. 623 search terms across category, brand and product, and deal terms. Each term is indexed to its own January to July median and the median term is reported. Ahrefs volumes are modelled, so we read timing and relative change, not absolute volumes.
5. Analysis of RADIUS (retail media) data, October 2025 to September 2026. Cost per click sponsored listings. Q4 findings come from an everyday category advertiser (personal care) on quick commerce apps across the GCC, and fashion advertisers on leading online marketplaces in the UAE and Saudi Arabia. Indexed. Sales as reported by the retailer.

SOURCES AND METHODS (CONTINUED)

6. Analysis of PerformR (creator) data. Campaign findings from Platformance, "Eight Months of Buying Creators in MENA", October 2026: 140 creator campaigns for 44 brands across the GCC and Egypt, February to September 2026. Performance findings use 305 organic TikTok posts, with 31 posts showing signs of paid support set aside. Response means likes and comments per 1,000 views. Attention: 28K posts on creators' own accounts, 2024 to 2026, each against that creator's usual views.

7. Saudi government salaries are paid on the 27th of each month, or on the last working day before it when the 27th falls on a Friday or a public holiday. [Miqatona](#).

8. UAE Ministry of Human Resources and Emiratization, Ministerial Resolution No. 340 of 2026, reported by [Khaleej Times](#), 18 May 2026. From 1 June 2026, private sector wages are due on the first day of each month.

9. [The National](#), updated 6 October 2026. Ramadan 2027 is expected to begin on 8 February 2027, subject to moon sighting.

10. Google and Visa, [MENA commerce: consumer insights, peaks and growth in the UAE and Saudi Arabia](#), September 2025. Google search and Visa spend data. In the November peak week, deal related searches rose 69%, and spending rose 31% in the UAE and 36% in Saudi Arabia.

11. The 95:5 rule, LinkedIn B2B Institute with Professor John Dawes of the Ehrenberg-Bass Institute, reported by [Marketing Week](#): around 5% of a category's buyers are in market at any one time. The share is higher in frequently bought categories; 5% to 15% is the planning range Platformance uses across consumer categories.