

2025 Ramadan

Giant shopping spectacle or authentic brand connection - which path will you choose?



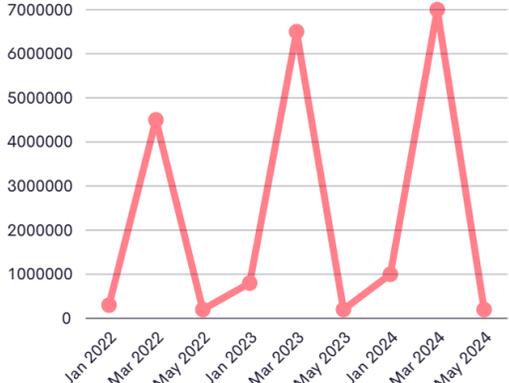
Lanterns aglow, prayers at sunset, iftar feasts, and late-night Fawazeer shows - these timeless Ramadan moments still capture our hearts. While the holy month's spiritual essence and communal spirit endure, the ways people embrace these traditions are evolving, as they are increasingly getting influenced by offline and online content, and new experiences. This provides marketers with an opportunity to connect more deeply with consumers.

Welcome to our Ramadan 2025 Whitepaper.

Inside, you'll discover consumer intelligence to help shape standout brand experiences this holy month. We've decoded the consumer behaviours to help you craft your media campaigns that resonate and build lasting connections that impact your brands in the short and long term.



Ramadan related searches continue to grow year on year

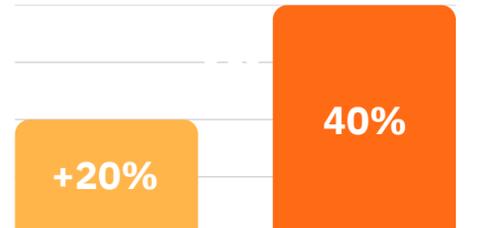


+48% increase between 2024 and 2022

So What An opportunity for brands to increase their visibility and engage with a more receptive audience.

Source: Google keywords, All GCC markets

The commercial value of Ramadan is also continuing to exceed - reflecting in increasing year-on-year media investments

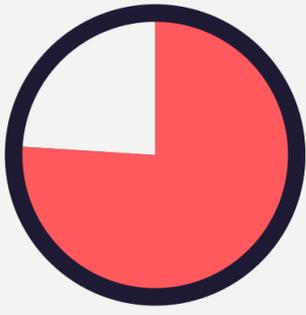


2018/19* On top of a brands average monthly budget¹

2024* Of a brand's total yearly budget²

Source: TikTok - 1. The Digital Expert, 2022 2. Arab Ad Online, 2024 * Estimated amount invested into Ramadan during time period.

These media shifts are defining new norms for Ramadan



76% of consumers in MENA say that their media and shopping behaviours around Ramadan differ from the rest of the year.

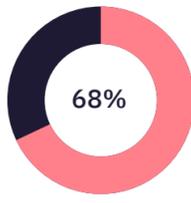
Furthermore, according to Google, Ramadan user searches tend to increase by almost double. Searches are more likely to be related to food recipes, perfumes, clothing, Ramadan offers, automobiles, religious content, and hypermarket deals.

Source: TTD, Google - MENA region

Understanding consumer behaviors is key to capitalize on these shifts



Increase in apps downloads during Ramadan season, as behaviours shift for Ramadan.

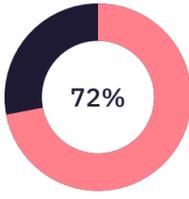


Spend time using social media channels



Of UAE and KSA consumers use at least one social media channel to search for gift ideas.

While Search and Social is a good place to start, **the role of open internet cannot be discounted**



Of people's time is spent on open internet (apps, websites, connected TV, podcasts and more).

So What These shift presents new opportunities for brands to reach their target audience

Source: GWI UAE, KSA and EGY, TGM MENA, Trafficguard, SimilarWeb, Google

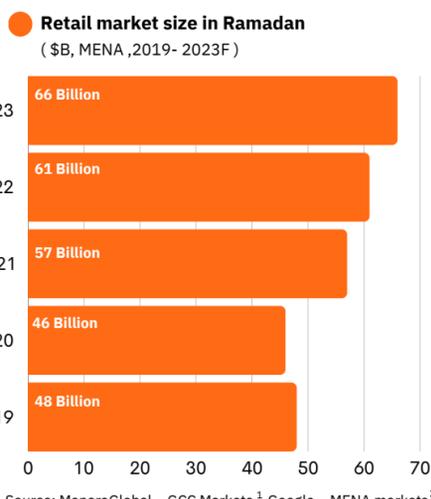
Ramadan drives a surge in consumer spending too!!

53%¹ of GCC consumers increased their spending during Ramadan and retail sales across the region last year reached USD 66 billion¹ during the holy month, which almost matched White Friday, the most significant shopping event in the Middle East, for total sales.

According to a Google study, 56%² of people who celebrate Ramadan in Saudi Arabia, 64%² in UAE, and 74%² in Egypt say they'd spend more during the holy month.

+8% 2023 YOY

So What There are more opportunities for brands to increase the wallet share of their customers



Source: ManaraGlobal - GCC Markets,¹ Google - MENA markets²

What does this mean for brands?

With the increased engagement and spending during Ramadan, brands have the potential to achieve a higher return on investment (ROI) on their marketing efforts.

However, the competition for attention is becoming fiercer, driving short termism in marketing plans

Source: 1. Arab Ad Online, 2024 , 2. IPSOS Ramadan Handbook MENA, 2024; 3. Kantar Cross Media META, 2023

Increased competition

+40% - Of total brands who activate in the year invest in Ramadan¹

Increased Saturation

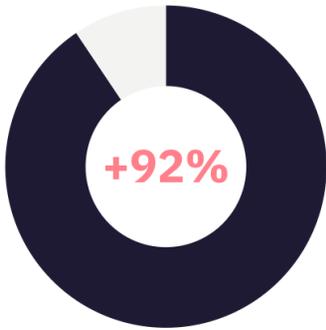
76% - Of audiences feel there are too many ads during Ramadan²

Clutter & Fatigue

-27% - Of Total media impact during Ramadan vs. Non-Ramadan Period³

While this short termism helps win some sales, using price wars to compete during Ramadan is not enough

For people, it's a moment to come together!

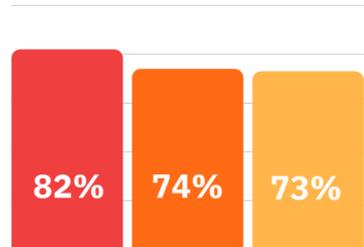


of respondents across the region emphasised that the alignment of products and services with the spirit of Ramadan is important to them

Source: The Trade Desk

Friends and family are THE go-to sources for inspiration , but brands can also play a pivotal role on their own to inspire ideas and new product discovery

Who do I trust the most for ideas and new brand/product discovery?...



- 82% of Snapchatters say 'In-person or online conversations with my friends/family'
- 74% of Snapchatters say 'Advertising or posts from brands on social media apps'
- 73% of Snapchatters say 'Social media content from influencers or creators'

Source: Snapchat

But, there are more than usual nuances to Ramadan in 2025

The convergence of Ramadan with peak tourism, presents a strategic opportunity. Brands should evaluate whether to implement dual media strategies or craft an innovative unified approach that spans multiple platforms. Their focus should remain on deepening customer connections and enhancing their journey, aiming to build trust that drives short-term results while fostering enduring brand equity. For marketers this means it's not simply a balance between traditional brand and performance tactics/channels but actually a recognition that all marketing interactions deliver brand and performance outcomes.

Another crucial consideration in 2025 is Ramadan's alignment with paydays. Consumer behavior and advertising receptivity shift notably around paydays, which bookend the holy month. This timing suggests a strategic framework: deploy promotional content during the first and last weeks while focusing on brand storytelling throughout the middle period.

This means....

Facilitate Togetherness

Build Authentic Engagement

Align with Ramadan Values

Create Meaningful Content

Enable Community Involvement

Contact Assembly Global MENA to discuss how your brand can act on these 5 pillars using innovative media and content strategies.

As market saturation is obvious with thousands of Ramadan campaigns, Cut through the Clutter with Data-driven Marketing

Use insights to define baseline and guide planning strategy

Combine the quantitative insights with the qualitative depth of primary research, creating a holistic understanding of the consumer, category and competition, informing every aspect of the media strategy.



Adopt an Omnichannel strategy

Measure for any gaps in your brand's perceptions and experiences, to enable seamless experiences across all platforms, from social media to apps, websites, and physical touchpoints.



Mitigate Post-Ramadan Fatigue

Develop Growth Fueling strategies to sustain customer engagement and loyalty, ensuring long-term value beyond the festive season.



Harness Data to create Personalized Experiences

Find Change using insights from your 1p customer data and create impactful campaigns that resonate with individual preferences and behaviors.



Enable Real-Time Monitoring

Leverage Research & Analytics tools to track performance, adapt campaigns, and maximize effectiveness during Ramadan.



Centrepoint's AR Experience Ramadan game concept - An example of effective Data-Driven approach

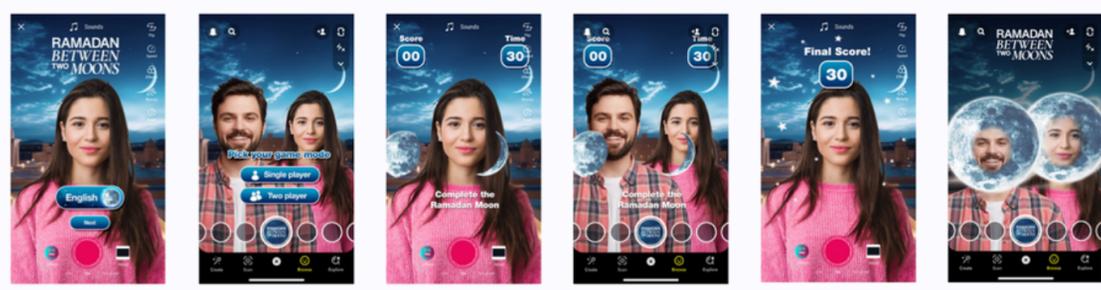
AR experience designed to cultivate engagement during the competitive Ramadan season, coupled with unique paid media strategy to achieve mass reach

OBJECTIVE:

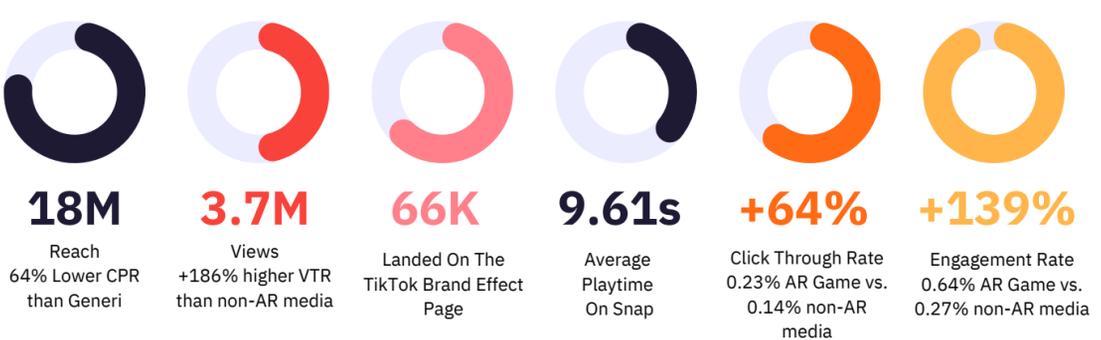
- 1 High engagement:** we wanted to see users really take time out of their scrolling and media consumption to focus on our brand
- 2 Mass reach:** this highly engaging format needed to reach as much of the audience as possible
- 3 Social Focus:** our research showed media consumption highest on TikTok and Saudi users love to see us on Snap
- 4 Cultural impact:** we wanted to create a buzz that people would talk about and love to share with family and friends!

APPROACH:

Intentional Gameplay Loop Designed Through Culturally Relevant AR Ideation and Supported with Beta Testing to Maximize Engagement and Build a seamless Brand Experience Iteration



IMPACT



Final Thoughts

With Ramadan on the horizon, brands are presented with a valuable opportunity to forge genuine connections with Muslim consumers.

The cornerstone of successful Ramadan marketing lies in authentically capturing the essence and values of this holy month.

By gaining a deep understanding of Ramadan's importance to Muslims and weaving this knowledge into their marketing approaches, brands can develop campaigns that resonate deeply and cultivate enduring relationships with the audience.

This Ramadan, encourage your brand to embrace the month's true spirit, creating messages that transcend mere sales pitches and instead honor the transformative nature of this significant period for the community.
Ramadan Kareem!



Thank You

+ASSEMBLY