

+ASSEMBLY

2023

Key Shopping Dates

How to think *differently* this Shopping Season in MENA

Table of Contents

Click or tap on a section below to jump to it.

01 The Current Outlook

[Jump to Section](#)

02 Shifts in Value Shaping the Shopping Spirit

[Jump to Section](#)

03 Omnichannel Tactics to Fuel Growth

[Jump to Section](#)

Exec Summary

Unlocking Black Friday & Cyber Monday Success in the MENA region

In crafting a marketing approach for the upcoming Black Friday and Cyber Monday, our focus remains firmly on the unique dynamics of the MENA region while drawing insightful comparisons to the established landscape of the US and North America. As we navigate through this strategic journey, it is essential to recognize that while Black Friday originated in the United States, the MENA market possesses its distinct nuances and demands a tailored approach.



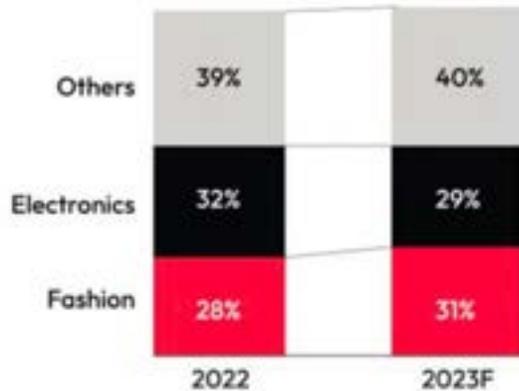
Chapter 01

Current Outlook



Black Friday is a **\$74bn** Retail Opportunity in MENA

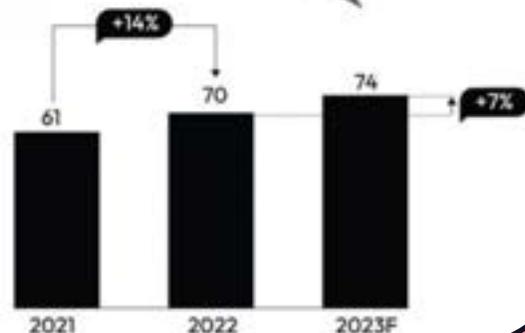
Significant shift has occurred in the Black Friday retail landscape...



With fashion now projected to be a bigger area this year, it might signal a transformation in MENA's retail landscape with a shift away from **the focus on the electronics market** for this annual sales day.

MENA Black Friday Retail Evolution
\$ Bn, 2020 - 23F

Black Friday is expected to return to normalcy following the World Cup event last year



Fashion sales are expected to surpass electronics sales this year, a first for black Friday in the MENA region.

Over in the **US**, the outlook is also positive

Forecast similar growth this Holiday season

\ **Holiday Hammock is the new shape of holiday calendar**

October Prime Day and competing retailer promotions represent the first industry wide tentpole that triggers consumer spend followed by a lull until Cyber5

\ **Value seeking mindset endures**

Consumers have discretionary income but value seeking remains top of mind as they rebound from peak inflation

\ **Modest brick-and-mortar growth**

Outside of Thanksgiving weekend, expect a more typical economy where ecommerce is a higher growth channel.

Holiday 2023 Forecast

+4.5%

YoY Growth

TOTAL RETAIL SALES

HOLIDAY 2021

\$1221.8B

HOLIDAY 2022

\$1270.8B

HOLIDAY 2023

\$1328.0B

+11.9%

YoY Growth

ECOMMERCE

HOLIDAY 2021

\$204.2B

HOLIDAY 2022

\$232.9B

HOLIDAY 2023

\$260.6B

+2.8%

YoY Growth

BRICK & MORTAR

HOLIDAY 2021

\$998.9B

HOLIDAY 2022

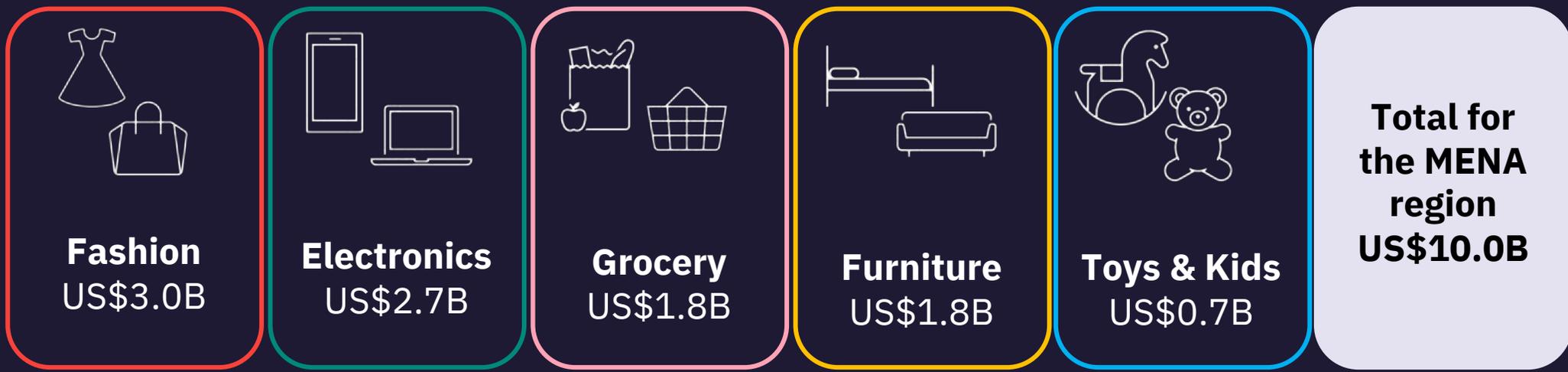
\$1037.9

HOLIDAY 2023

\$1067.4

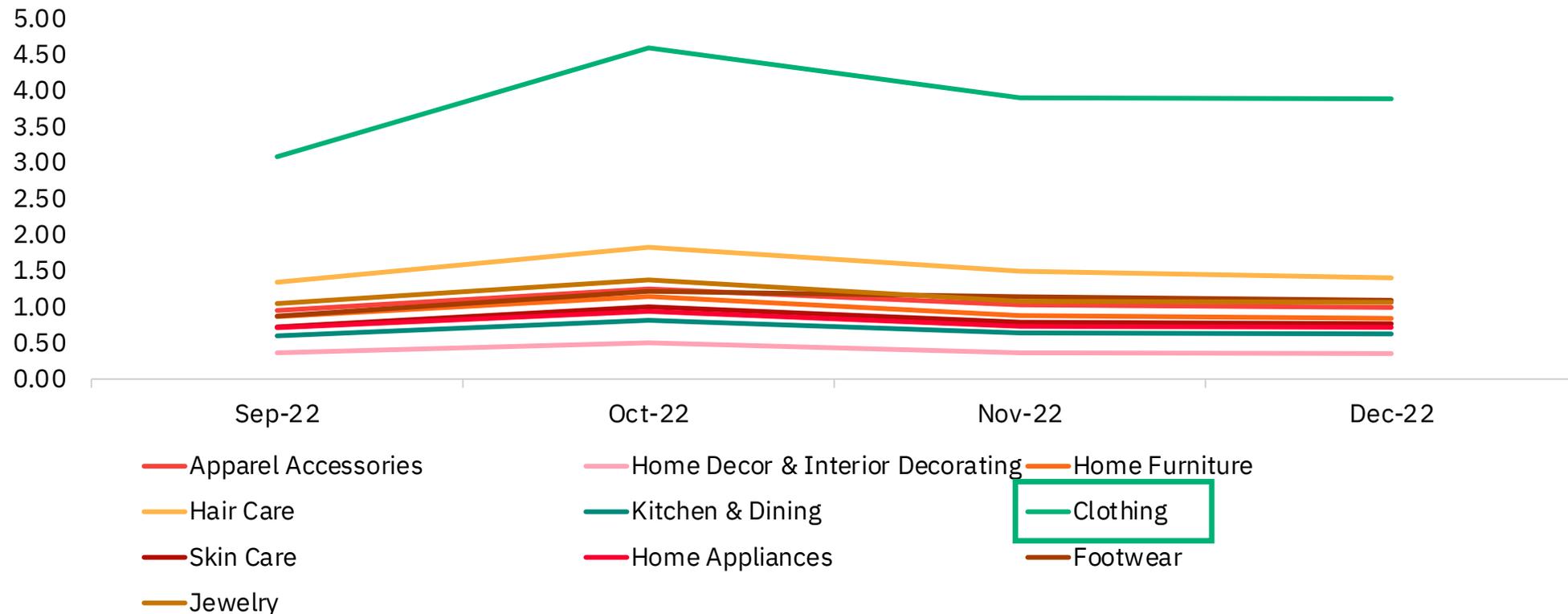


Anticipated contribution by E-commerce categories in **MENA** this shopping season

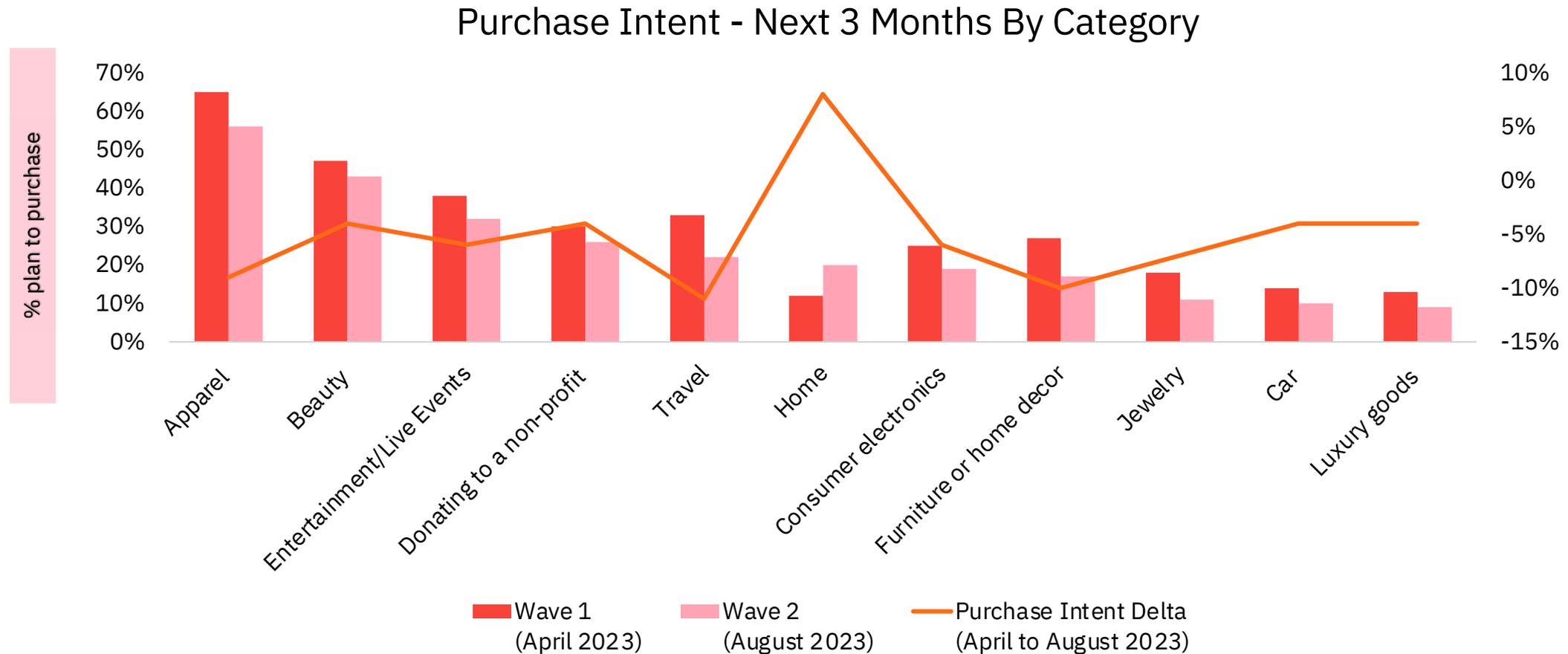


Demand for the **Clothing** Category is the Highest During The Shopping Season in MENA

Women's Clothing has more than 98% search queries, 40% Culturally specific clothes & 25% Men's clothing



Over in the **US**, Purchase Intent is Down for a Wide Range of Categories Typically Bought During the Holidays



Keep an Eye on Subscription Based Shopping, a Growing Trend in the Middle East

Which, if any, of the following products/services do you currently buy using a subscription service?

32%

Household
Grocery
Delivery

29%

Tea & Coffee

27%

Clothing /
Fashion

24%

Beauty &
Cosmetics

23%

Grooming
Products

While In-store shopping purchase saw an increase in 2022 of 43% vs 2021 with the emergence of **immersive shopping experiences**



Chapter 02

Shifts in Value Shape the Shopping Spirit



+ASSEMBLY

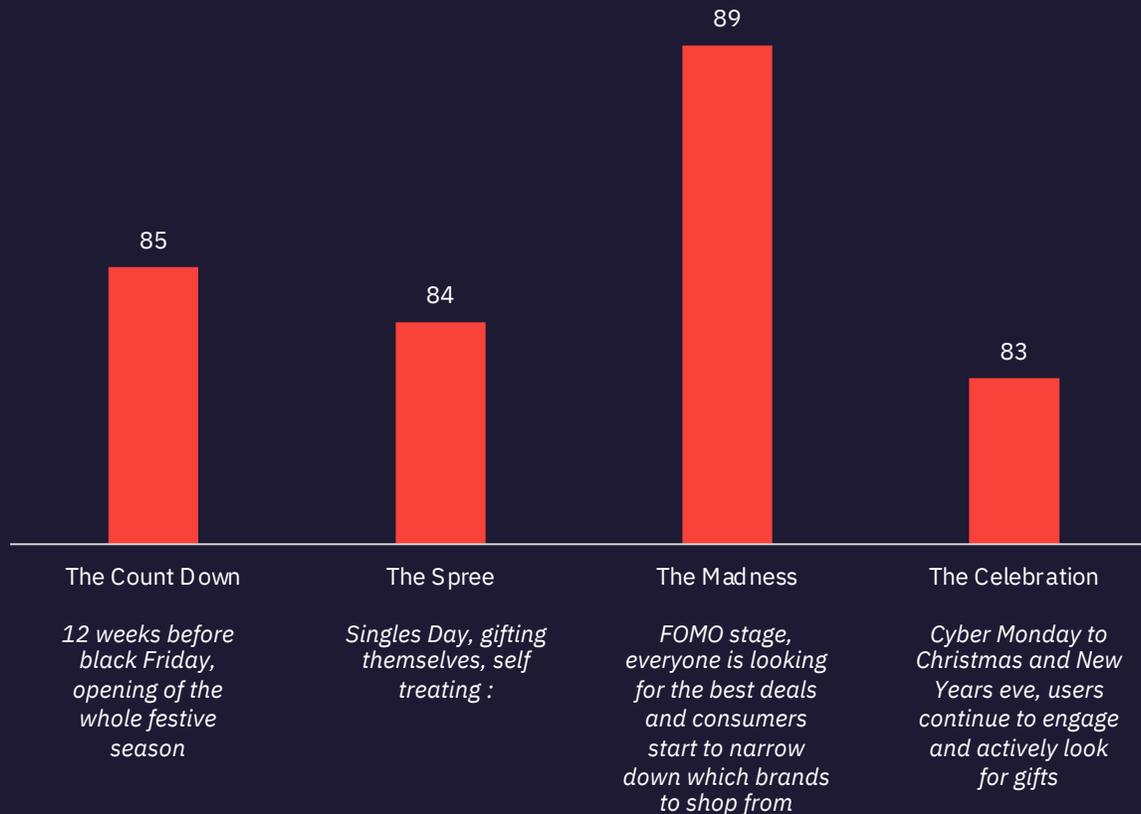
“There has been a notable shift in consumer behavior, with growing preference for quality experiences. Consumers are also increasingly seeking sales and promotions year-round”

(Sandeep Ganediwalla, partner at Redseer)

Shift in focus for marketers to drive value for shoppers throughout the year, and not just during Black Friday and Singles Day.

The burn of inflation means, consumers are shopping throughout the whole season and **looking for deals and discounts much earlier**

MENA Average Purchases



55%

Hunt earlier for products and do not wait for the actual sales dates



Counting Down



Consumers are eager to explore new products in MENA



Halloween is becoming a significant micro moment in the region with 25% rise in "Halloween" search term



Saudi Arabia drove 40% of the Halloween interest growth

Spree Shopping Me-Time



MENA consumers embrace self-celebration during Singles' Day



"Singles' Day" search interest rose by 35%, focusing on indulgent buys



Video searches for "makeup" surged by 95%

Shopping Madness



Shoppers diversify their purchases, including home decor, kitchen essentials, wardrobe updates, and personal styling



Video for discounts: "coupon" search interest on YouTube up 25%, general Black Friday discount searches up 90%



Cooler temperatures prompt fashion focus: "formal shoes" up 40%, "scarf" up 85%, "chino pants" up 35%

Celebration



Emerging micro moments like UAE National Day, Cyber Monday, Christmas, and New Year generate growing excitement



Festive preparation surge: "Christmas dress" up 65%, "jumpsuit" up 30%. "Christmas ornaments" rise 50%, "New Year's Eve food" increase by 105%



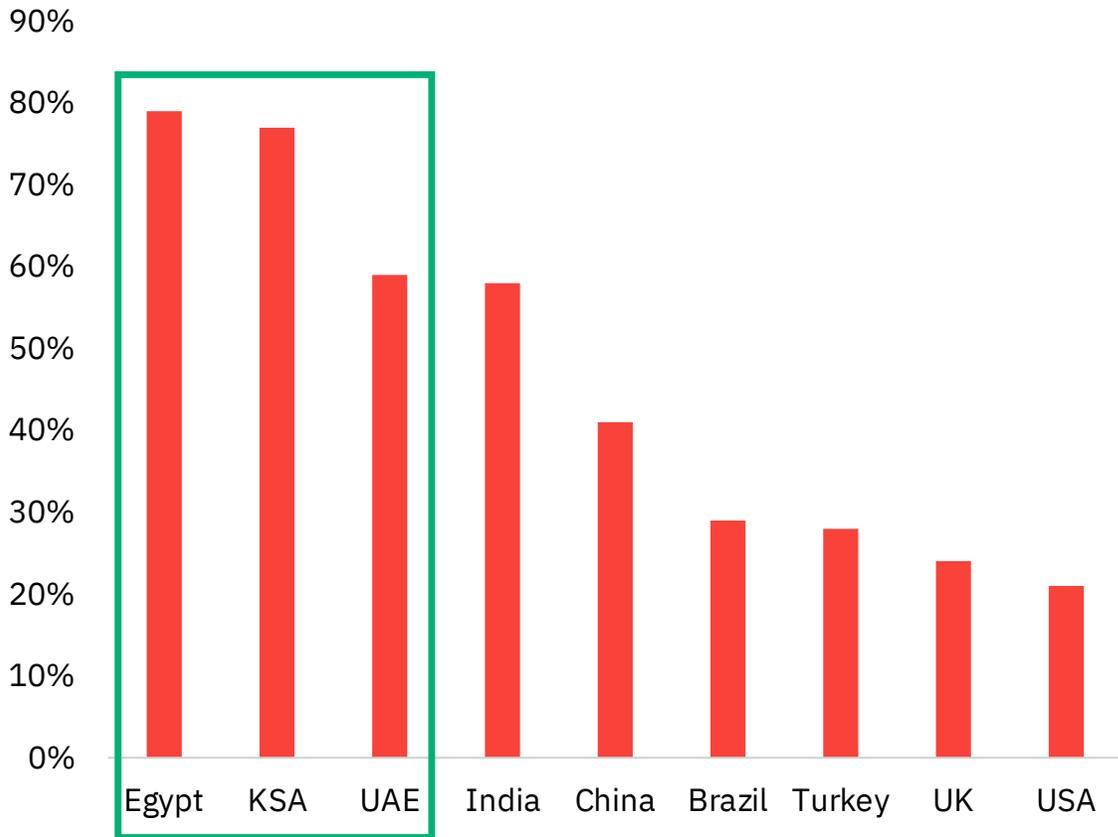
Last-minute shoppers seek convenience: "gift card" searches rise by 35%.



Retail Related Searches Peak During the Shopping Season in MENA



3Y Growth in Retail Related Searches



At the same time, Video Consumption sees a sharp increase



Shopping Related Videos



+66%

Oct-Dec'22 YOY in YouTube viewers



Video Content, Deals and Discounts Continue to Dominate During the Shopping Frenzy

Video content is key to helping make purchase decisions!



1/3



Of shoppers Classify video content as their **favorite source of ideas**

2/3

Of shoppers Consider video content as a way **to help them identify what to buy**

Consumers are feeling the excitement for the BF season



55%

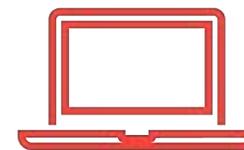


Of shoppers begin hunting for products early-on and **do not wait for the actual sales dates**

51%

Of shoppers noted that black Friday **' sales season is more important than any other sale during the year**

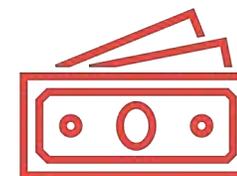
Consumers look for new brands



60%

of MENA Shoppers **look for new products and brands** during the sales season

Consumers are expecting a seamless shopping experience



61%

of shoppers expect **to find the same deals online** as they would find in-store





Search, Social & Video, Rank Highly For **MENA** Customers



Source: GWI | Waves (Q3&Q4 – 2022 & Q1 & Q2 – 2023)



Locations: Saudi Arabia, UAE

- **31%** typically find out about new brands & products through Search Engines
- **40%** expect brands to listen to customer feedback
- Reach them on Facebook **33%** use it more than once a day
- In the last week, **94%** went online and consumed video content
- **41%** spend more than 4 hours a day on online Mobile
- **Who do they follow?** Friends, family or other people they know

I research a product online before buying it

I think social media is good for society



Consumers rely on research and technology as they finalize their purchase decisions

50%+ use retailers' apps on their mobile to compare products and use social media to view live or visual reviews before purchasing.

50%+ use search engines to research items, ranking it as one of the top three ways of researching products, while an equal number use Amazon (49%), and 41% use social media platforms.

68%+ of regional consumers purchase directly from a brand's website.

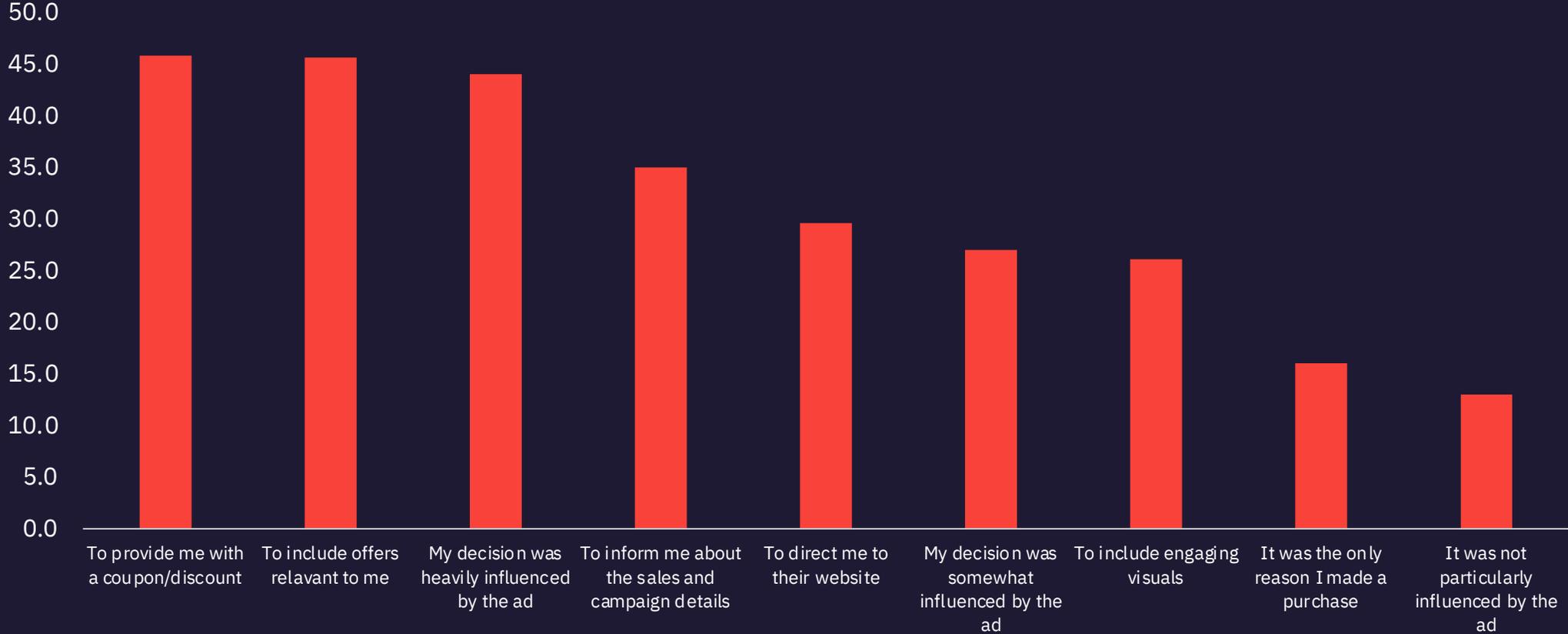
50%+ of regional consumers research products online, using their phones in-store to compare products and determine if they are cheaper on the website.

49%+ rank sponsored ads on social media & ads that directly link to offers and promotions among the top three most influential tools.



Deals & Discounts Are of High Priority when it comes to Mobile Content Expectations

Consumer Ad Content Expectations for the Shopping Season





Your **MENA** Ideal Customer for The Shopping Season



Source: GWI | Waves (Q3&Q4 – 2022 & Q1 & Q2 – 2023)



Locations: Saudi Arabia, UAE

Persona



**28% Parenting
Focused Workers**

Gender



**38% Male
62% Female**

Generation (Age Group)



**Gen Y
(Millennials)
(25-34)**

Income



**39% Low
25% High
26% Medium**

Country (Living Area)



**Saudi Arabia,
UAE (Urban)**

Education



**Upper
Secondary
Education**

Employment Status



**Full- Time
Worker**

Status



**64% Married
46% are Parents**



Chapter 03

Omnichannel Tactics for Creating *More Valuable* Shopping Experiences



Three key themes

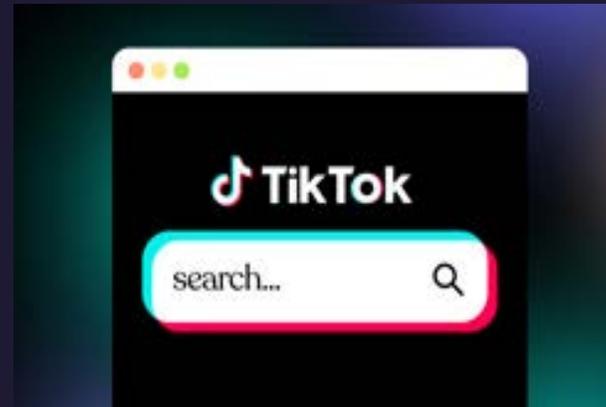
Experiential Retail is the Future

Beyond deals and discounts, online shopping experience that goes beyond traditional transactional exchanges and aims to engage customers on a deeper, more immersive level will be a big win this shopping season. Virtual environments or interactive elements that simulate the physical shopping experience are encouraged.



Rise of Social Search

As social commerce explodes and desire for more curated reviews, so does the amount of keyword searches on social platforms. More than 50% of Gen Z shoppers are turning to search on social.



Emphasis on Video & Content

Prioritize video and compelling content to captivate online shoppers. Leverage the power of visual storytelling through engaging videos to stand out in the crowded digital space. Share product highlights, promotions, and exclusive deals through dynamic content that resonates with your target audience



Tech & Innovation Tactics to Create More Valuable Shopping Experiences

VR Shopping



Customers can explore products in a virtual environment, trying before buying, even from the comfort of their homes.

AI-Powered Personalization



Supermarkets using AI-powered checkout and virtual try-on features allow customers to examine products at home.

AR Displays

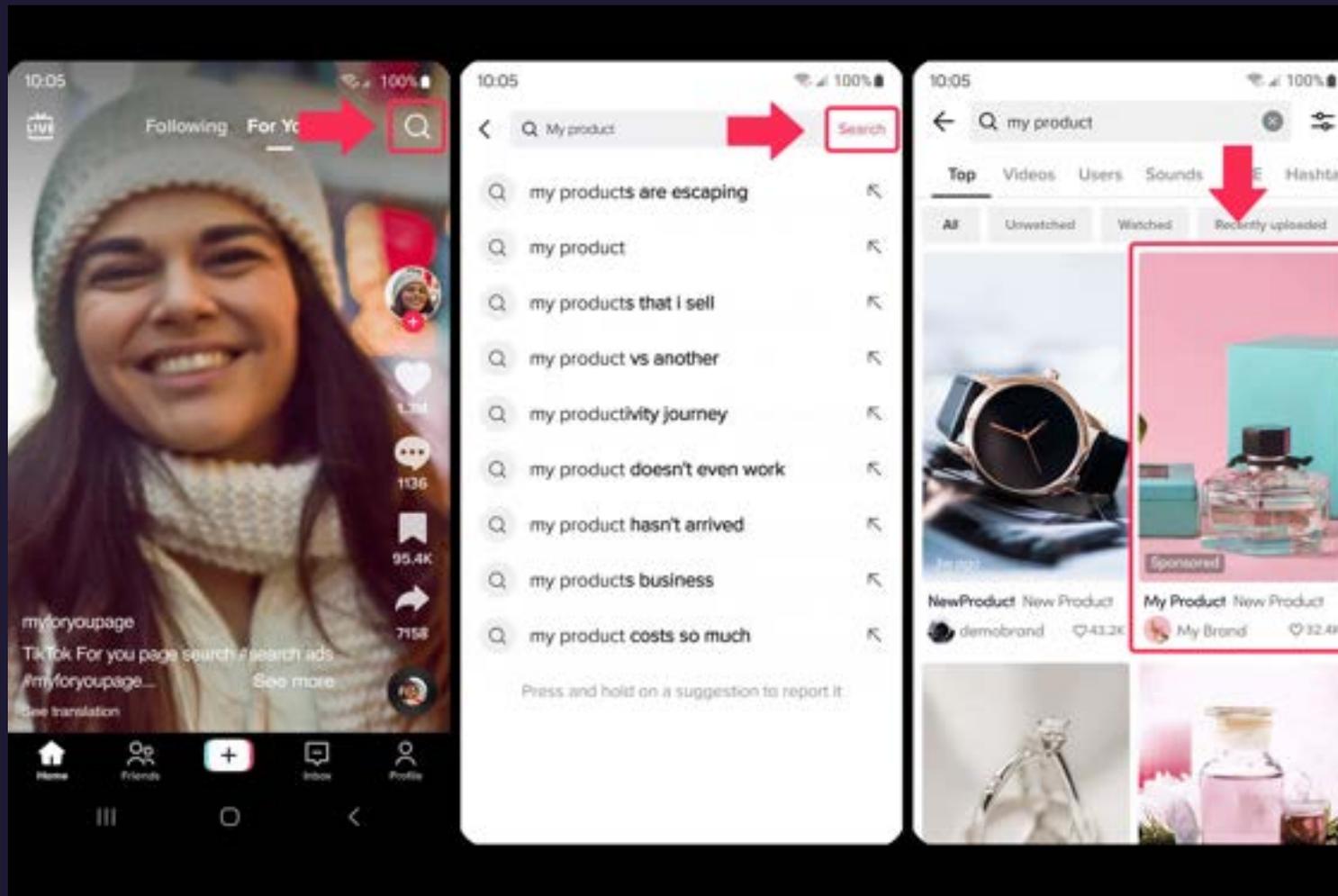


Customers can use their smartphones to view additional product information, try virtual makeup, or visualize how furniture would fit in their homes.

AI has transformed the retail industry by improving speed, efficiency, and accuracy across every part of retail business



Social Search Tactics to Create More Valuable Shopping Experiences



Search Ads Toggle

A new feature on TikTok Ads Manager that allows brands to serve ads in TikTok search results

With the Search Ads Toggle, brands can extend the reach of their campaigns to high-intent users who are **seeking deals and discounts**



Social Tactics to Create More Valuable Shopping Experiences

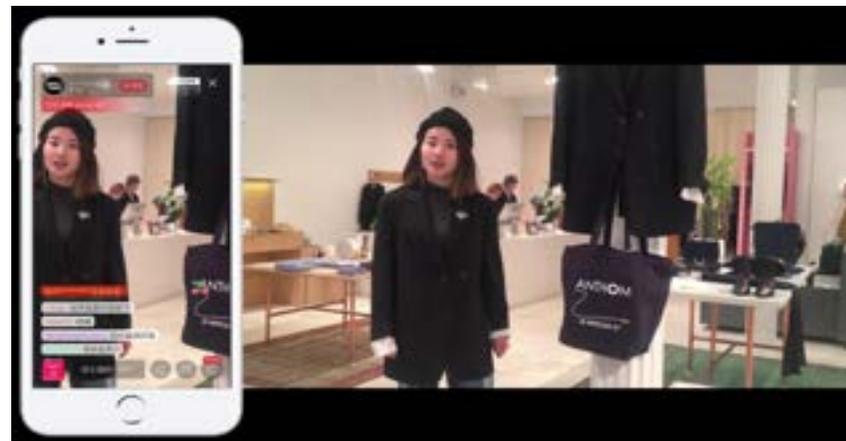
Branded content



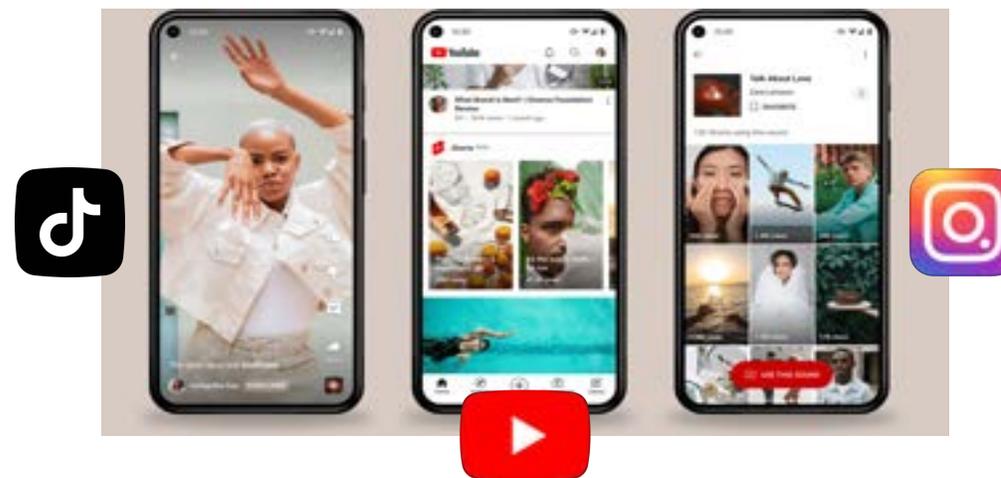
Influencers content



Live Shopping



Short Form Videos



Video Tactics to Create More Valuable Shopping Experiences



Online Video Has A
1.8X Higher
Ability To Drive E-commerce Sales
Than The More
Traditional TV
Media Channel.

Source(s): Google | 2023



People are looking for black Friday shopping haul videos



People are looking for videos for people unboxing gifts



People are looking for videos showing the best deals, offers and discount codes

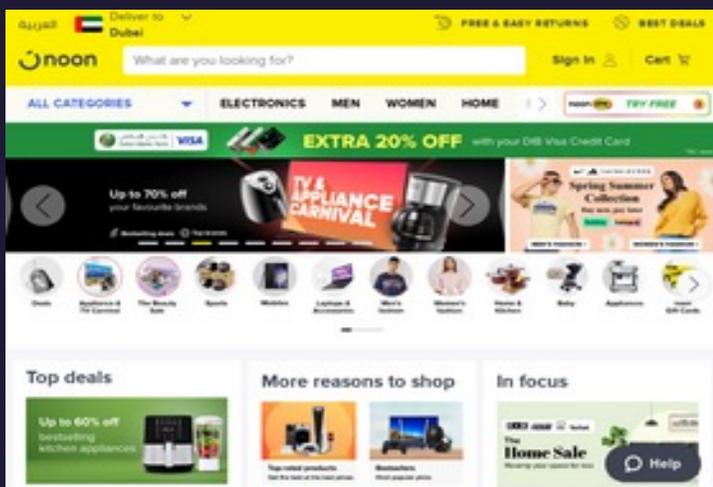


People are looking for unboxing videos for what they bought



Marketplace Tactics to Create More Valuable Shopping Experiences

NOON



Noon leads in food and pantry products.

Why it's a game-changer ?

1. Extensive Product Range
2. Easy Seller Onboarding
3. Enhanced Visibility
4. Hassle-Free Logistics
5. Secure Payment Gateway
6. Dedicated Seller Support

SIVVI



Sivvi delivers everything from casual tees to designer dresses

Why To sell on Sivvi ?

1. over 2,000 brands under its belt
2. an intuitive app
3. offering personalized recommendations
4. easy-to-navigate categories & a Wishlist to bookmark those must-have items
5. Sivvi's got you covered with fast delivery options, including same-day service.
6. customer-friendly policies & a range of payment methods

AMAZON



Amazon particularly shines in areas like electronics

Why it's One of the Best ?

1. Amazon is a go-to for all sectors
2. It offers a stable & consistent marketplace option
3. Amazon businesses benefit from its reputation
4. High quality fulfilment services available
5. Amazon is seller-friendly!



Paid Search to Create More Valuable Shopping Experiences

Paid search best practices you should include

-  Routinely evaluate your target keywords' performance
-  Leverage A/B testing
-  Make special offers a habit
-  Use local and negative keywords
-  Adapt to a "mobile-first" mindset
-  Take advantage of voice search popularity
-  Focusing on clicks and on conversions & Include call conversions
-  Increase the loading speed of your landing pages
-  Diversify your strategies
-  Run responsive search ads / responsive display ads
-  Incorporate video
-  Ditch third-party cookies and opt for the new first-party cookies

Performance Max



Unlock new Audiences
across Google's
channels & Networks



Drive better
performance against
your goals



Get more
transparent insights



Steer automation with
your campaign inputs

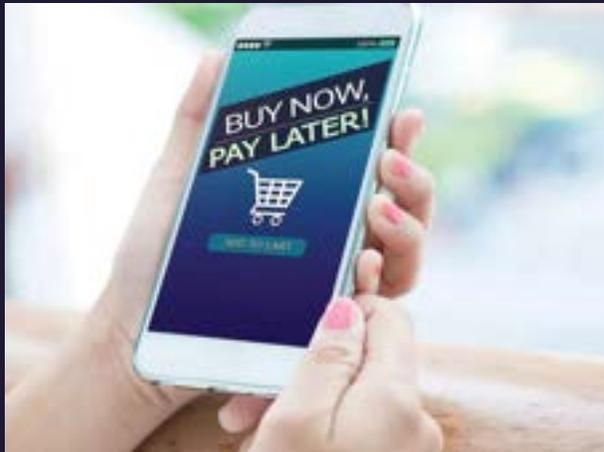


Simplify Campaign
management & easily
optimize your ads



Affiliate Tactics to Create More Valuable Shopping Experiences

BNPL



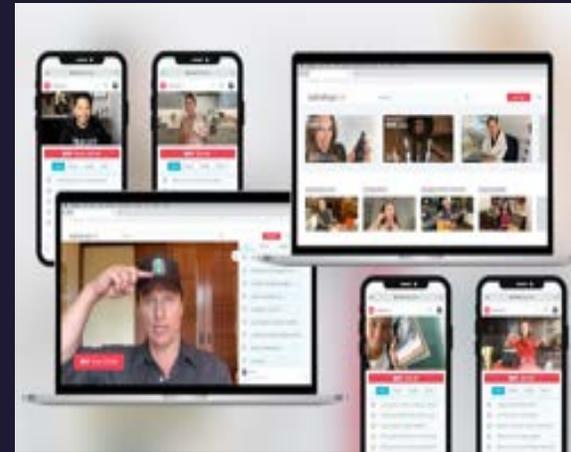
Retailers partnered with major players like Klarna, Affirm, PayPal & Block to leverage their BNPL offers rather than build their own.

YouTube Affiliate



YouTube Affiliate Program where creators tag affiliate links directly in their product featured video

TalkShopLive



Over in the US, Walmart jumped on the trend of TikTok to reach consumers in a shopping mindset by teaming up with live social-shopping network, **TalkShopLive** to release special buys.

RetailMeNot



Similarly in the US, In-store campaigns with RetailMeNot and highlight Buy Online, Pick Up In Store opportunities with partners like Rakuten Rewards



Thank You

