

# CMO FORUM MIDDLE EAST

## Marketing Leadership Under Pressure

**Closed-door. Peer-level. Off the record**  
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IPSOS: ABG INSIGHTS PARTNER

# CONSUMER INSIGHTS: Shifts Under Pressure



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# UNDERSTANDING CONSUMER **SHIFTS** IN THE UAE

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Over recent weeks, heightened uncertainty across the region has **reshaped consumer sentiment and behavior.**

To better understand this shift, we conducted a study among a sample of **800 UAE residents aged 15+**, exploring how consumers are engaging, spending, and making decisions today.

The findings reveal a move toward **value-driven, and digitally-led behaviors**, many of which are expecting to become **long-term habits rather than temporary reactions.**

# DURING UNSTABLE TIMES, DIGITAL ENGAGEMENT **RISES**



**+55%**

**SOCIAL MEDIA  
USAGE**

*Youth aged 15-24 increased their consumption  
1.2x more than those aged 25+ years*



**+53%**

**NEWS WEBSITES  
& APPS USAGE**



**+50%**

**MESSAGING  
APPS USAGE**

# A DUAL DYNAMIC OF CAUTION AND OPTIMISM IS SHAPING CONSUMER PURCHASES



**58%**

Desire to save money



**54%**

Optimism, positive outlook



**48%**

Need for Comfort, entertainment



**39%**

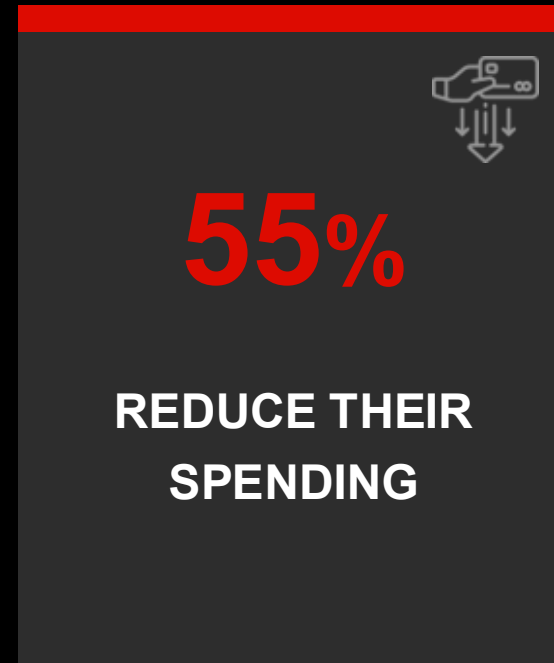
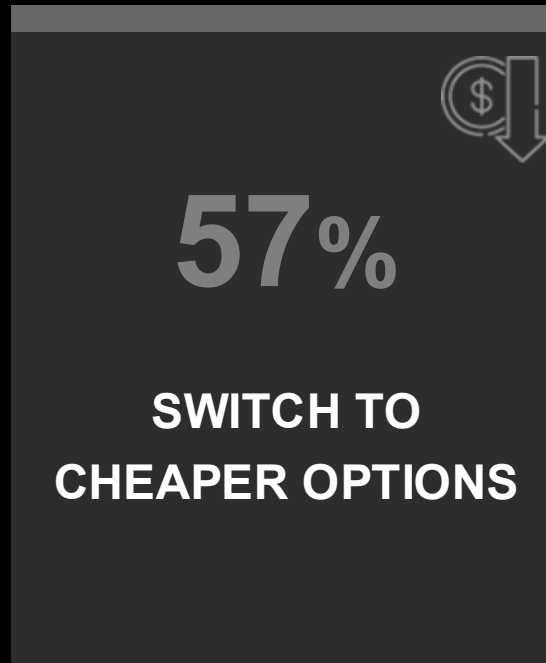
Uncertainty about the future



**36%**

Stress, anxiety

# SPENDING SHIFTS TOWARD ESSENTIALS AND CONTROL



**PROMOTIONS REMAIN A KEY  
PURCHASE TRIGGER INFLUENCING  
THE MAJORITY OF CONSUMERS**

**4 in 5**

# REDEFINING THE VALUE PROPOSITION: THE DUALITY OF PRICE SENSITIVITY AND PROMOTIONAL DISCOVERY

**56%**

actively seek discounts and promotions

Strong deal-driven behavior

**42%**

are more price-sensitive than before

Increased financial caution

**39%**

prefer bundled offers or value deals

Shift toward maximizing value



**PREMIUM IS NOT DEAD!  
IT IS BRAND-DEFINED.**

**30%**

**WILLING TO PAY MORE FOR TRUSTED NAMES**

Emiratis 1.8x more than Arab Expats



*Q: Which of the following best describes your attitude toward prices and promotions currently?*



# THE ONLINE SHOPPING ECOSYSTEM CONTINUES TO EXPAND

# 85%

# INCREASING OR MAINTAINING USAGE

# 60%

**ARE TURNING MORE TO LOCAL BRANDS,  
WHICH ARE GAINING STRATEGIC  
RELEVANCE IN UNCERTAINTY**

Shoppers aged 45+ are 1.2x more likely to purchase local brands vs. people aged 15-44 years

# 3 in 5

**MAJORITY OF TRAVELERS NOW PLAN  
THEIR TRIPS EARLIER THAN BEFORE,  
REFLECTING A SHIFT IN PLANNING  
BEHAVIOR**

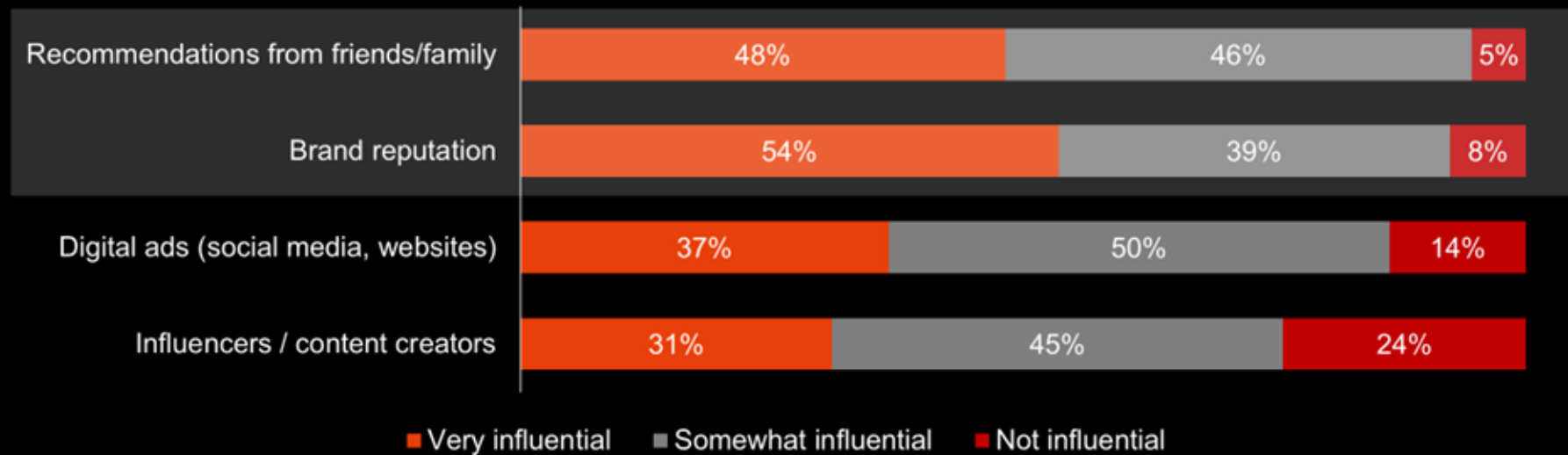
Emiratis and Arab Expats are 1.2x more likely to start early planning than other expats



# 62%

**OF TRAVELERS NOW PRIORITIZE  
DOMESTIC/REGIONAL DESTINATIONS AS  
A PROACTIVE CHOICE FOR CERTAINTY  
AND SECURITY**

# WORD OF MOUTH AND BRAND TRUST LEAD PURCHASE DECISION-MAKING, ALONGSIDE EXPOSURE TO BRAND COMMUNICATIONS.



# TRUST IN INFLUENCERS IS REINFORCED WHEN CONTENT FEELS RELEVANT, TRANSPARENT, AND GROUNDED IN CONTEXT

**63%**

trust them more when they acknowledge the situation before promoting a product

**62%**

value transparency on paid partnerships

**60%**

found promotional content inappropriate during the sensitive moments



# 1.6x

**MILLENNIALS (15–34) ARE 1.6x MORE LIKELY  
TO BE INFLUENCED BY INFLUENCERS  
THAN 35+ AUDIENCES**

# LEARNINGS FOR MARKETERS IN THE UAE

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Design for  
“control-driven  
consumption”

Build a  
“digital-first”  
not  
“digital-only”  
ecosystem

Compete in the  
attention  
economy,  
not just  
media reach

Shift from  
institutional  
trust to social  
validation

Anchor  
communication  
in “stability and  
relevance”

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# Thank you

**Need more information ?**  
Let's connect !





MARKETER OF THE  
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