

RESILIENCE AMIDST UNCERTAINTY

Navigating the strategic shifts in UAE consumer
behavior under regional pressure

May 2026

UNDERSTANDING CONSUMER SHIFTS IN THE UAE

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

To understand this shift, and as part of the first **CMO Forum** in the MENA region powered by the Advertising Business Group (ABG), Ipsos conducted an online survey using the Ipsos Online Panel between 4–17 April 2026, among a nationally representative sample of 800 UAE residents aged 15+. The study explores how consumers are engaging, spending, and making decisions today.

The underlying reality

Consumers are navigating uncertainty through adjustment rather than avoidance.

The UAE consumer is not pulling back. They are recalibrating how they live, spend, and make decisions.

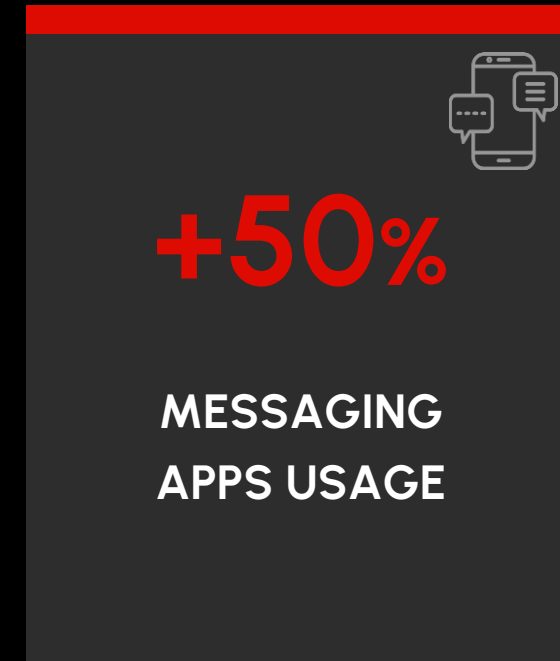
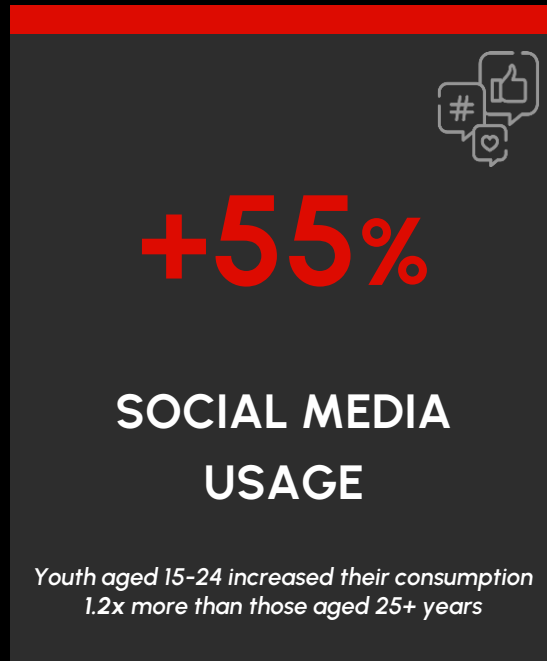
These shifts are expected to persist, reflecting a structural change in behavior rather than a temporary response.

The new consumer response patterns

- Spending is becoming more intentional
- Digital is becoming the primary decision environment
- Trust is shifting from institutions to networks
- Premium is being redefined as justified value

DURING UNSTABLE TIMES, DIGITAL ENGAGEMENT RISES

Instability acts as a catalyst for digital consumption, driving both information-seeking (news) and social reassurance behaviors (social + messaging), with youth amplifying this trend



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

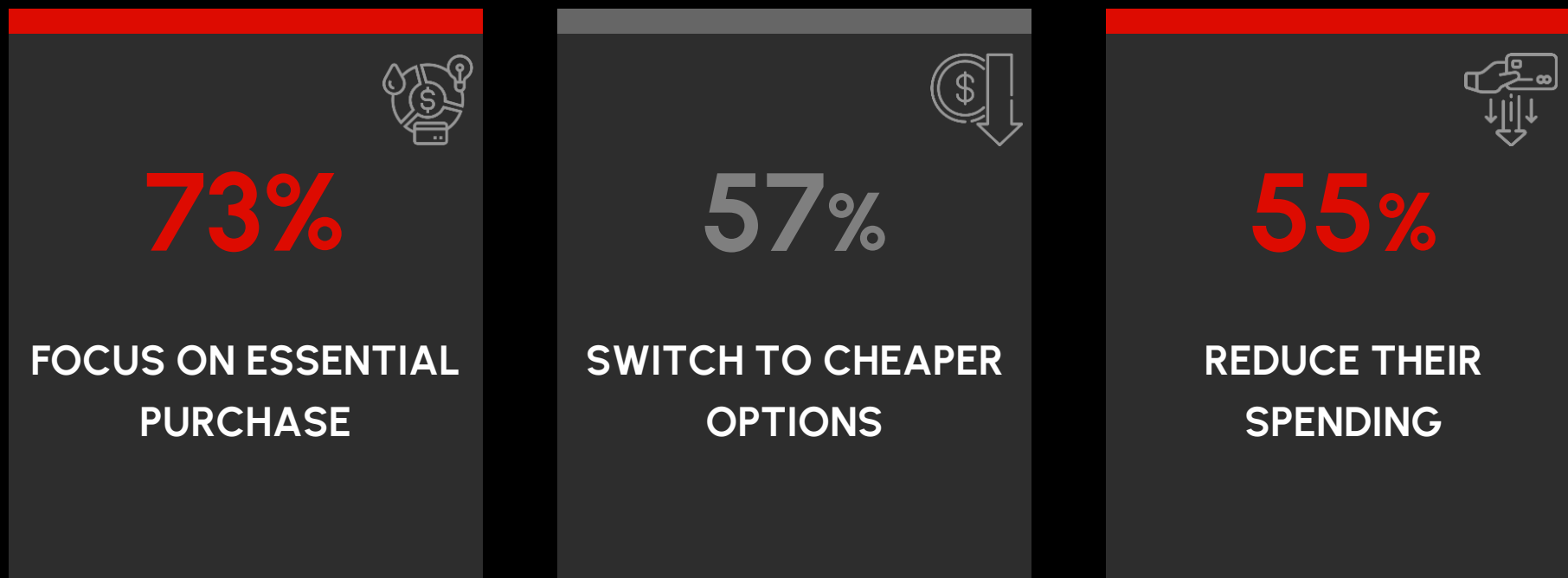


36%

Stress,
anxiety

SPENDING SHIFTS TOWARD ESSENTIALS AND CONTROL

While consumers haven't stopped buying, they are increasingly shifting toward controlled consumption by prioritizing essentials, trading down to cheaper alternatives, and reducing their overall spend.



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



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**

7 in 10

ARE ACTIVELY CAPITALIZING ON LOCAL HOSPITALITY AND F&B OFFERS, REFLECTING A HIGH-ENGAGEMENT "STAYCATION" ECONOMY

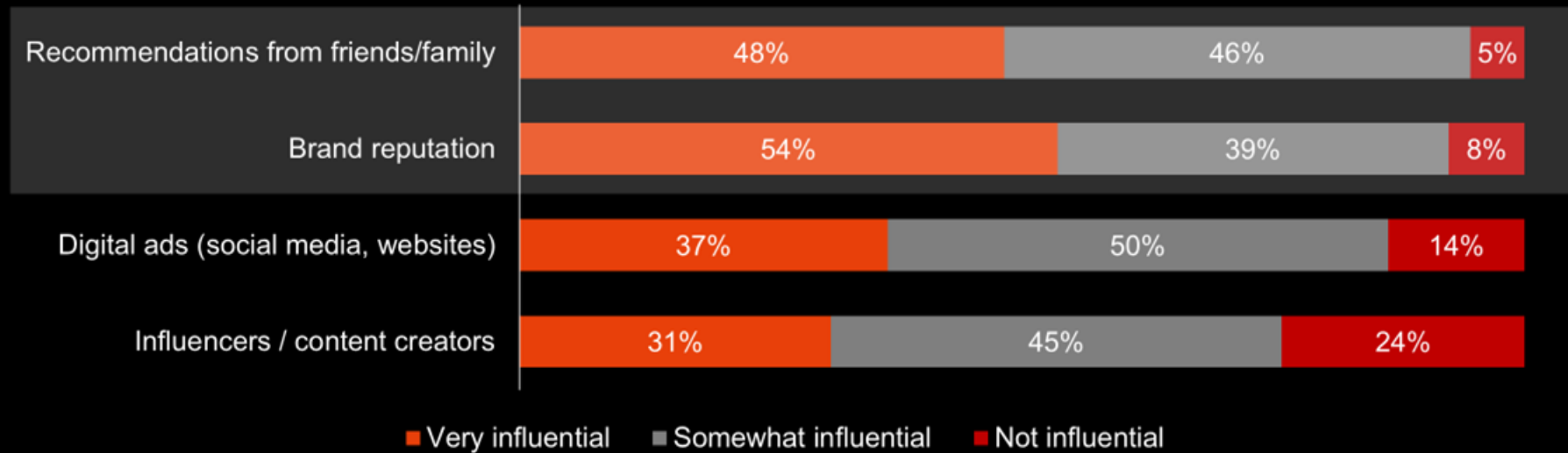
Emiratis and Arab Expats are 1.2x more likely to be leveraging local hospitality and F&B offers

1 in 2

**ENGAGE WITH ADS WHILE BROWSING SOCIAL OR
STREAMING CONTENT, MAKING DIGITAL A CORE
VISIBILITY DRIVER**

Q: In which situations are you MOST likely to notice ads now?

WORD OF MOUTH & BRAND TRUST LEAD PURCHASE-DECISION MAKING, ALONGSIDE EXPOSURE TO BRAND COMMUNICATIONS



Q: How influential are the following sources when making your purchase decisions currently?

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

Q: To what extent do you agree with the following statements about influencers nowadays?



1.6x

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

LEARNINGS FOR MARKETERS IN THE UAE

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"

4 KEY TAKEAWAYS

With over 70% of consumers showing lasting behavioral shifts, brands must prioritize long-term strategies built on reassurance, consistent value, and locally relevant narratives in the UAE.

1

Design for “control-driven consumption”

Consumers are not cutting spend, they are rebalancing toward control, value, and certainty (~70–80%).

Brands must shift from “aspiration-led” messaging to utility, reassurance, and value clarity.

2

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

With 85% maintaining or increasing digital usage, digital is the default layer of engagement.

But winning brands integrate seamless offline credibility (retail, service, trust signals) into digital journeys.

3

Compete in the attention economy, not just media reach

With 80%+ increasing or maintaining news/media consumption, audiences are active, but fragmented across 3+ sources.

Brands must orchestrate presence across formats (short updates, explainers, social proof) rather than rely on single-channel dominance.

4

Shift from institutional trust to social validation

With 65–75% relying more on close networks, trust is increasingly peer-led rather than institution-led.

Brands need to activate communities, micro-influencers, and peer advocacy loops, not just top-down messaging

Thank you

Need more information ?
Let's connect !

Athanas Jamo
Chief Client Director
athanas.jamo@ipsos.com
Ipsos / MENA