

Global Consumer Insights Survey 2022  
Middle East findings

# Optimism returns but priorities are shifting



[www.pwc.com/me](http://www.pwc.com/me)

## Pulse 3

# About the survey

Since the 2021 Global Consumer Insights Survey, PwC has adopted a 'pulse' approach in order to remain attuned to changes in the worldwide landscape and connected to the behaviours of the global consumer.

This latest Pulse 3 of the Global Consumer Insights Survey includes responses from 526 consumers from the UAE, Saudi Arabia and Egypt. The respondents were at least 18 years old and were required to have shopped online at least once in the previous year.

**This report references the Middle East findings of the following surveys:**



Where we've included data from previous surveys, the base sizes are listed below the graph.

This research was undertaken by PwC Research, our global centre of excellence for primary research and evidence-based consulting services.  
<https://www.pwc.co.uk/pwcresearch>

# Executive summary

Middle East consumers are emerging from the pandemic in a positive mood about the region's prospects. Our latest Global Consumer Insights Survey (GCIS) pulse, conducted in late 2021, shows that 53% of the region's shoppers are optimistic about the economy, a significantly higher proportion than the global average of 37%.

At the same time, our regional respondents are aware that economic uncertainties remain – not least, the threat of inflation. Like their international counterparts, Middle East shoppers are thriftily seeking out the best bargains and deals, both in-store and online. As the region's tech-driven transformation accelerates, consumers in the region are also concerned about their personal data security to a greater degree than global participants. Meanwhile, the rise of sustainability as a significant influence on purchasing decisions continues.

## Our main findings are:

**Consumer confidence is on the rise but priorities are shifting**

**Sustainability is increasing in importance**

**Shoppers continue to prioritise price and convenience**

**Data privacy is key to consumer trust**

# 01



Consumer confidence is on the rise but priorities are shifting

Middle East consumers continue to become more confident about engaging in everyday activities that they took for granted before the pandemic – dining out, going to the gym, shopping at the local mall or just meeting up with friends. For example, 60% of Middle East consumers say they are likely to travel abroad in the next six months and 41% also expect to increase their expenditure on travel. Given the extent of the expat population in the region who are looking to reconnect with their family and friends back home, this isn't surprising. In the same period, 60% are also likely to take a domestic flight, a substantially larger proportion than the global survey average of 40%. The results from individual Middle East countries regarding consumer confidence reveal the same upbeat pattern.

Yet this is not a return to pre-pandemic normality, in the sense of the region's shoppers picking up where they left off before COVID-19 struck. A range of factors, from mass remote working to tech-driven regional transformation, have changed and continue to affect people's shopping habits and attitudes.

Overall, 65% see themselves as more digital than six months ago, well above the global survey average of 53%. With more time to focus on their health and wellbeing, 67% of Middle East consumers say that they are now also healthier (vs. 51% globally) and 66% agree that they have a good work-life balance, compared with 60% globally. The findings perhaps suggest that the pandemic has prompted regional consumers to reconsider their priorities.

Thinking of the last 6 months, please indicate from the list of attributes below how, if at all, you have evolved as a consumer.



**Note:** Showing only those respondents who answered 'I am more like this'.

**Base size:** 526 Middle East; 9370 Global

**Source:** PwC's Global Consumer Insights Survey Pulse 3

To what extent do you agree with the following statements...?

Middle East  
Global



I have a good work-life balance

**Note:** Showing only those respondents who answered 'strongly agree' or 'agree'.  
**Base size:** 392 Middle East; 7047 Global  
**Source:** PwC's Global Consumer Insights Survey Pulse 3



02

The image features a collage of four hexagonal photographs arranged in a grid. Each hexagon shows a mannequin's head and shoulders, with the head replaced by a dense arrangement of green, leafy plants. The mannequins are wearing different styles of clothing: a white top with a dark button placket, a grey top, and a tan top. The background of the photos is a soft-focus green, suggesting an outdoor setting. The entire collage is set against a solid orange background.

Sustainability is  
increasing in importance

The latest findings continue the trend of the previous GCIS reports for the region, which show the growing influence of sustainability as a factor in purchasing decisions. 60% of regional respondents say they are more eco-friendly than six months ago, while the same proportion consider sustainability factors when deciding what to buy.

Middle East shoppers are not just talking the talk on sustainability: 53% say they always or very frequently buy eco-friendly or sustainable products when they shop in-store, well above the global average of 42%.

Considering your general shopping behaviour in physical stores, please indicate how often you are shopping in the following ways.



**Note:** Showing only those respondents who answered 'always' or 'very frequently'.  
**Base size:** 526 Middle East; 9370 Global  
**Source:** PwC's Global Consumer Insights Survey Pulse 3



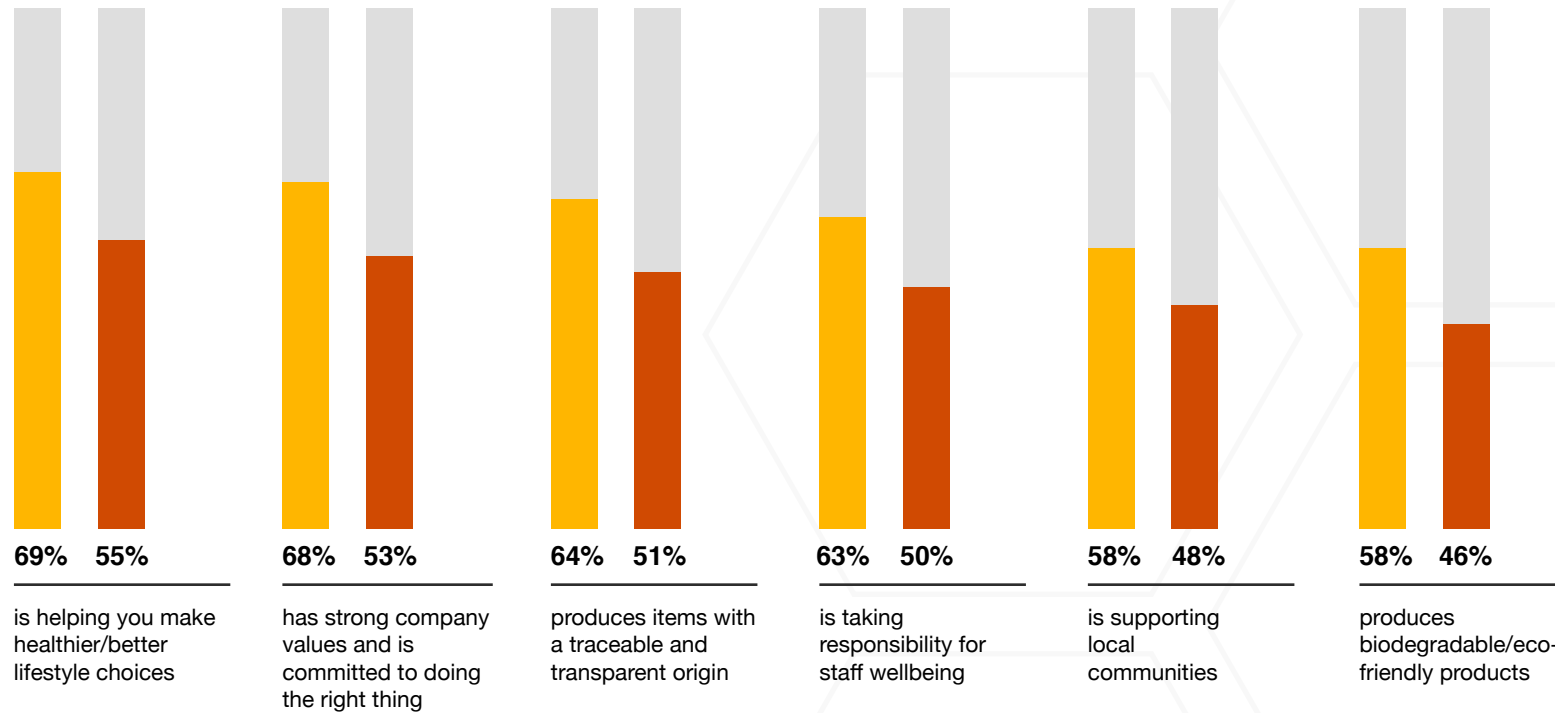


# Q

Before considering/making a purchase with a retailer, how often do you consciously consider the following factors?



## The retailer you are purchasing from...



**Note:** Showing only those respondents who answered 'all of the time' or 'most of the time'.

**Base size:** 526 Middle East; 9370 Global

**Source:** PwC's Global Consumer Insights Survey Pulse 3

03

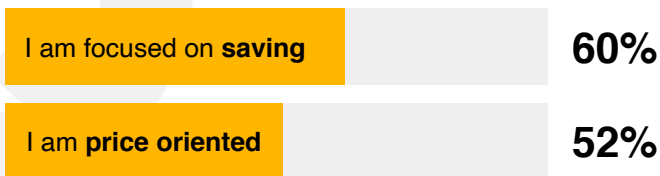


Shoppers continue to prioritise price and convenience

Around the world, consumers are acutely price-conscious and on the hunt for deals and bargains, especially given the threat of rising inflation. Despite their generally positive outlook, Middle East shoppers reflect this global trend, whether they are purchasing in store or online.

Overall, 60% of Middle East consumers say they have become more focused on saving in the past six months, while 52% are now more price oriented. In line with the global survey average, 57% of regional respondents are also willing to travel significantly further to a shopping destination that has offers and discounts available.

Thinking of the last 6 months, please indicate from the list of attributes below how, if at all, you have evolved as a consumer.



**Middle East**

**Note:** Showing only those respondents who answered 'I am more like this'.

**Base size:** 526

**Source:** PwC's Global Consumer Insights Survey Pulse 3

Thinking about what convenience means to you, please consider the following statements: "I would be willing to travel significantly further to a shopping destination where..."



**Base size:** 526

**Source:** PwC's Global Consumer Insights Survey Pulse 3

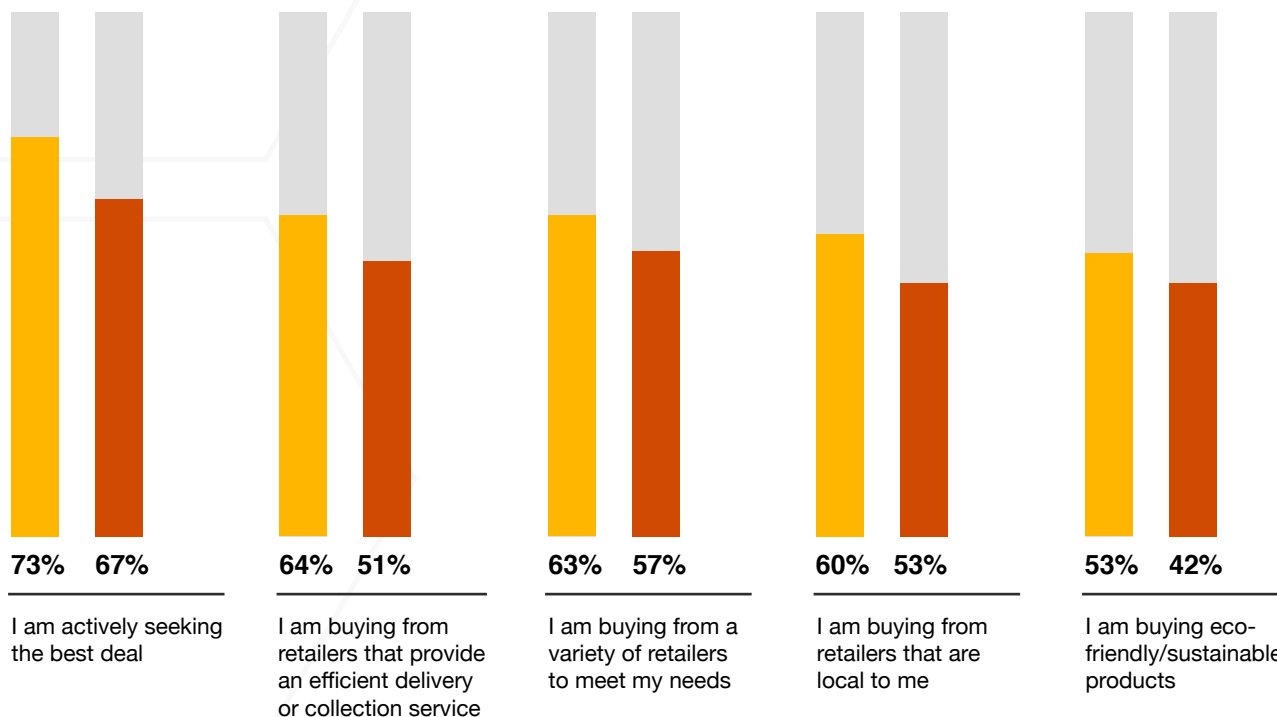
Interestingly, while sustainability is continuing to grow in importance, just 28% of Middle East consumers are willing to travel significantly further to a shopping destination where ethical and sustainable brands are available. This highlights that regional shoppers put price and convenience ahead of other considerations. Consumer companies need to keep this in mind and ensure that their products are sustainable as well as affordable and accessible.

## In-store shopping

When shopping in physical stores, 73% of Middle East consumers are either always or very frequently looking for the best available deal, slightly higher than the global average of 67%. At the same time, 60% of regional respondents buy from local retailers, while 64% buy from retailers that provide an efficient delivery or collection service.

Considering your general shopping behaviour in physical stores, please indicate how often you are shopping in the following ways.

Middle East  
 Global



**Note:** Showing only those respondents who answered 'always' or 'very frequently'.

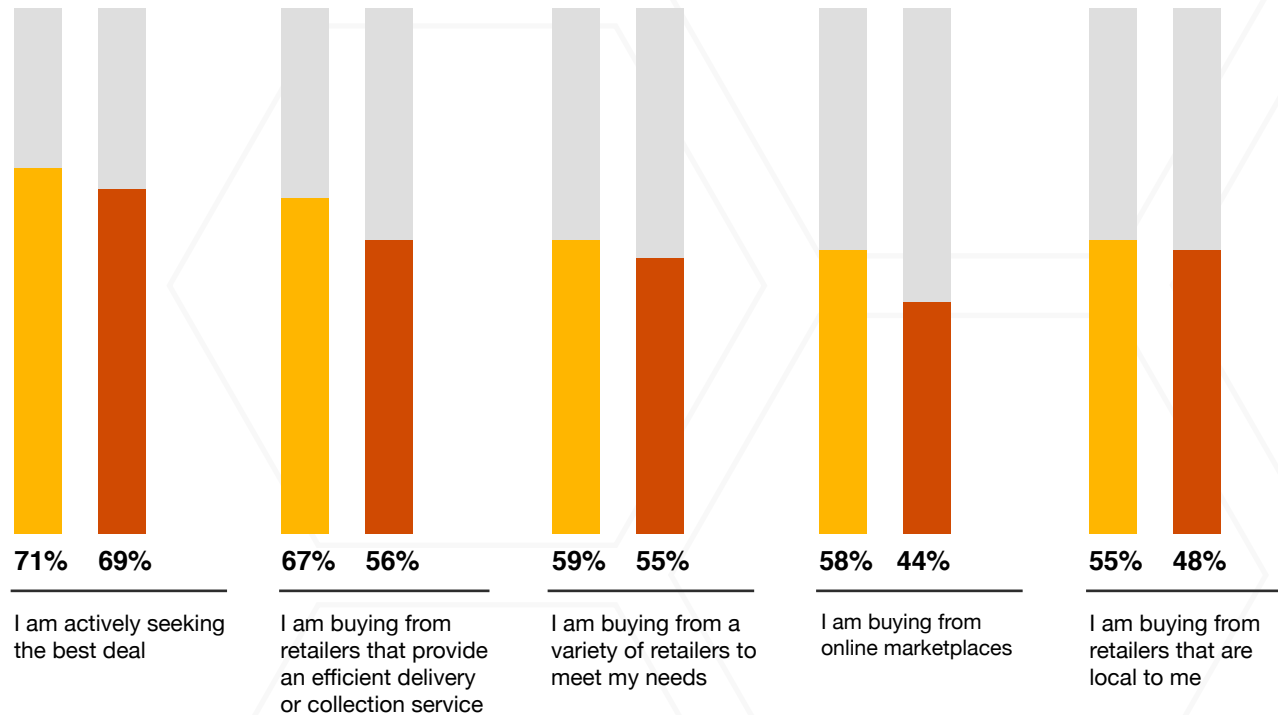
**Base size:** 526 Middle East; 9370 Global

**Source:** PwC's Global Consumer Insights Survey Pulse 3

# Online shopping

The same thrifty behaviour is evident among Middle East shoppers online. Reflecting the global average, 71% say they are always or very frequently seeking the best deal. However, a larger share of Middle East consumers shopping online (67% vs. 56% globally) always or very frequently buy from retailers that provide an efficient delivery service.

Considering your general shopping behaviour online, please indicate how often you are shopping in the following ways.



**Note:** Showing only those respondents who answered 'always' or 'very frequently'.

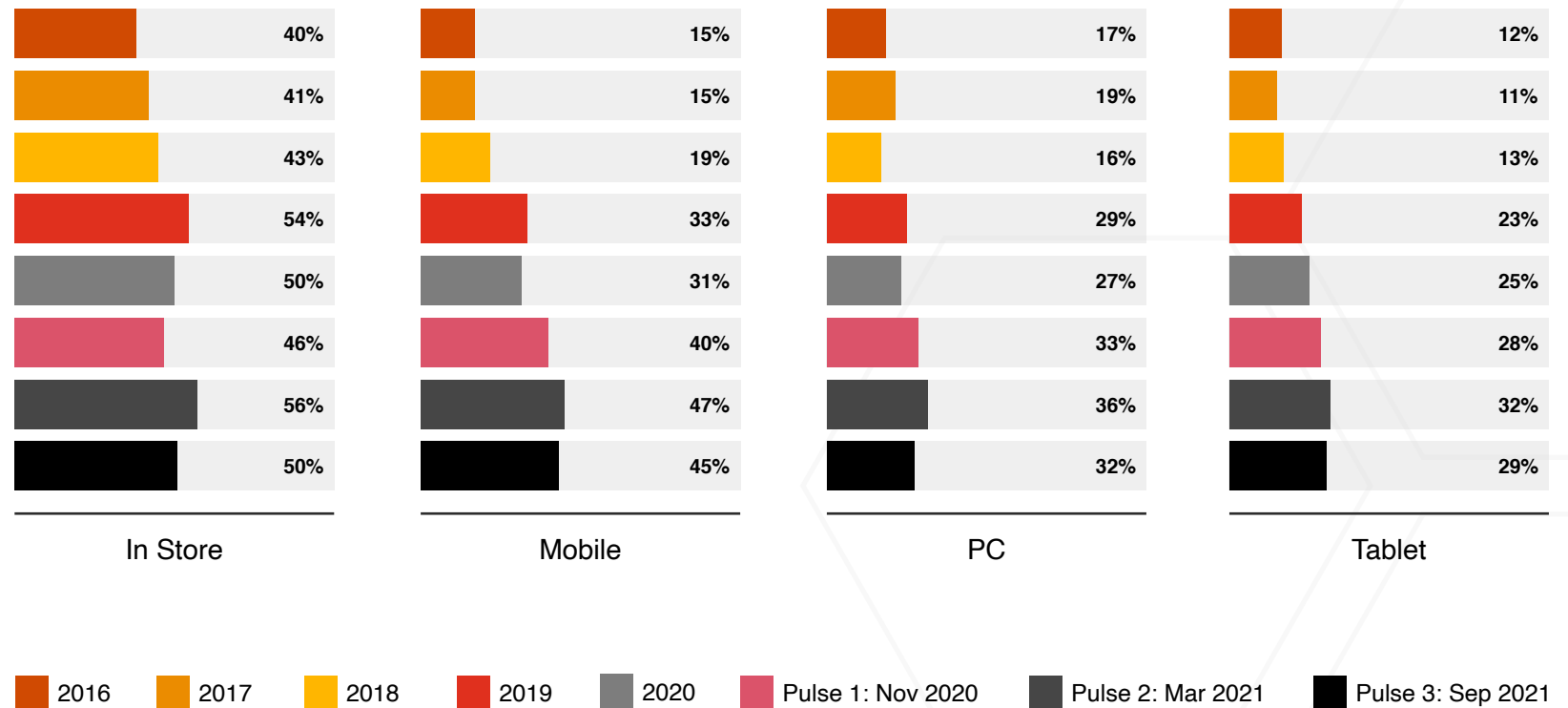
**Base size:** 526 Middle East; 9370 Global

**Source:** PwC's Global Consumer Insights Survey Pulse 3

# A multi-channel consumer society continues to emerge

Across the region, in-store shopping (50%) remains the most popular channel for frequent purchases but mobile continues to grow in importance — 45% of regional consumers shop daily or weekly using this channel. In this regard, the Middle East results reflect the overall global ones, which confirm that smartphone shopping is at a historic high worldwide. However, these findings need to be set in the context of COVID-19. Since March 2021, when we conducted our previous Middle East pulse survey, there has been a decline from 47% to 45% in the proportion of respondents who are using their mobile phones for weekly or more frequent shopping. This slight fall appears to be due to the fact that consumers are generally shopping less frequently than at the height of the pandemic.

In the last 12 months, how often have you bought products (e.g. clothes, books, electronics) using the following shopping channels? Not including grocery



**Note:** Showing only daily and weekly shopping.

**Base sizes:** 513 in Pulse 1; 515 in Pulse 2; 1,002 in 2020; 1,004 in 2019; 1,033 in 2018; 1,007 in 2017; 1,003 in 2016

**Source:** PwC's Global Consumer Insights Survey, 2016-2020 and Pulses 1, 2 and 3

04

A collage of hexagonal images showing people using mobile devices. The images are arranged in a honeycomb pattern. The top row shows a woman's face and hands holding a phone. The middle row shows hands holding a phone and a laptop. The bottom row shows hands holding a phone. The background is a solid orange color.

Data privacy is key  
to consumer trust

Consumers worldwide have become more protective of their personal data in recent months, amid rising worries about their exposure to online threats and scams — a sentiment that is also echoed by 57% of regional business leaders in our 25th CEO Survey\* who said that cyber risks will have a negative impact on their company in the next 12 months. In this regard, Middle East consumers are especially concerned, with 68% saying they are guarding their data more strictly than before, compared with a global average of 59%. Furthermore, 55% of the regional respondents, versus 47% globally, say a brand's ability to protect their personal data affects how much they trust it.

\* 25th CEO Survey: Middle East findings, PwC Middle East, 2022, <https://www.pwc.com/me/ceosurvey>

Thinking of the last 6 months, please indicate from the list of attributes below how, if at all, you have evolved as a consumer.

Middle East  
Global



Note: Showing only those respondents who answered 'I am more like this'.  
Base size: 526 Middle East; 9370 Global  
Source: PwC's Global Consumer Insights Survey Pulse 3

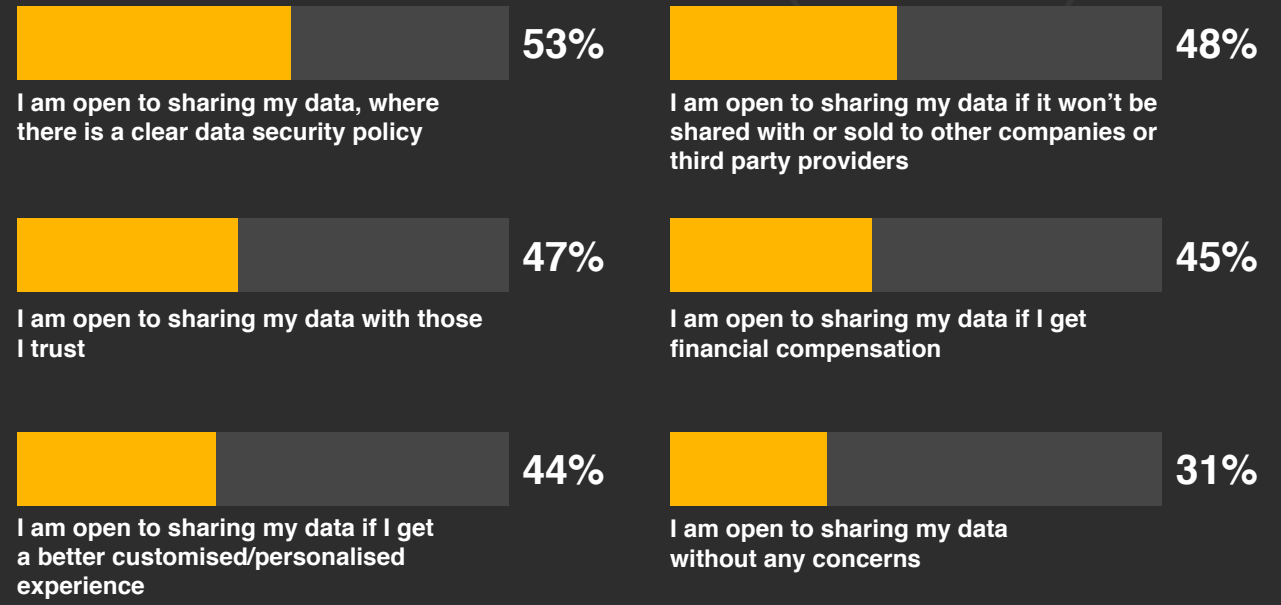
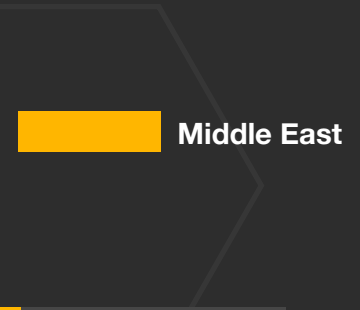




However, this general wariness about how companies manage their details does not amount to wholesale resistance. In line with the survey average, 53% of Middle East consumers are open to sharing their data, provided the recipient has a clear data security policy; and 48% (vs. 52% globally) will do so on condition that their data is not sold to other companies or third-party providers. This is true for consumers across the region.



**Thinking about your consumer data, to what extent do you disagree or agree with the following statements in relation to sharing it with organisations?**



**Note:** Showing only those respondents who answered 'strongly agree' or 'agree'.  
**Base size:** 526  
**Source:** PwC's Global Consumer Insights Survey Pulse 3

The message for Middle East businesses is the same as for their global peers, which confront the same increasing consumer nervousness about data sharing. Companies across the region need to prioritise security ahead of using personal data to offer customers tailored products, services and recommendations. This is particularly important as more and more Middle East retailers create and rethink their online strategies and loyalty programmes.

# COVID-19 has permanently altered the Middle East's consumer landscape

As the region emerges from the pandemic, two facts are evident from this latest survey of consumer trends and attitudes in the Middle East. Firstly, consumer behaviour has inevitably been influenced by COVID-19. Secondly, some of these changes have been “sticky”, in the sense that they are likely to become a permanent feature of the region's consumer landscape.

For instance, we believe that consumer concerns about data privacy are here to stay, following the mass experience of enforced shopping online during lockdowns. Companies which ignore people's anxieties about personal security risk losing customers to competitors. The regional findings also confirm that sustainability is now a critical factor in the purchasing decisions of a growing proportion of Middle East consumers, after a year when both COVID-19 and last autumn's UN Climate Change Conference heightened regional awareness of this issue.

However, it's not only pandemic-era trends that are having an impact on consumer behaviour — anxiety about rising prices is also driving Middle East consumers to hunt down the best bargains and deals. In this complex market landscape, our next pulse survey will continue to track and measure how the region's shoppers are both shaping and responding to the region's post-pandemic transformation.



# Get in touch

If you would like to find out more, visit us at [www.pwc.com/me](http://www.pwc.com/me) or get in touch.



**Norma Taki**

Partner, Middle East  
Consumer Markets Leader  
PwC Middle East  
[norma.taki@pwc.com](mailto:norma.taki@pwc.com)



**Sami Darouni**

Senior Executive Advisor  
Strategy & Middle East  
[sami.darouni@pwc.com](mailto:sami.darouni@pwc.com)



**Roy Hintze**

Partner, Middle East Consumer  
Markets  
PwC Middle East  
[roy.hintze@pwc.com](mailto:roy.hintze@pwc.com)



**Imad Matar**

Partner, Middle East  
Transaction Services Leader  
PwC Middle East  
[imad.matar@pwc.com](mailto:imad.matar@pwc.com)



**Maye Ayoub**

Partner, Middle East  
Consumer Markets  
PwC Middle East  
[maye.ayoub@pwc.com](mailto:maye.ayoub@pwc.com)



At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 156 countries with over 295,000 people who are committed to delivering quality in assurance, advisory and tax services. Find out more and tell us what matters to you by visiting us at [www.pwc.com](http://www.pwc.com).

Established in the Middle East for 40 years, PwC has 22 offices across 12 countries in the region with around 7,000 people. ([www.pwc.com/me](http://www.pwc.com/me)).

PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see [www.pwc.com/structure](http://www.pwc.com/structure) for further details.

© 2022 PwC. All rights reserved