



Ramadan International Survey 2021

Highlights from the world's largest Ramadan consumer survey

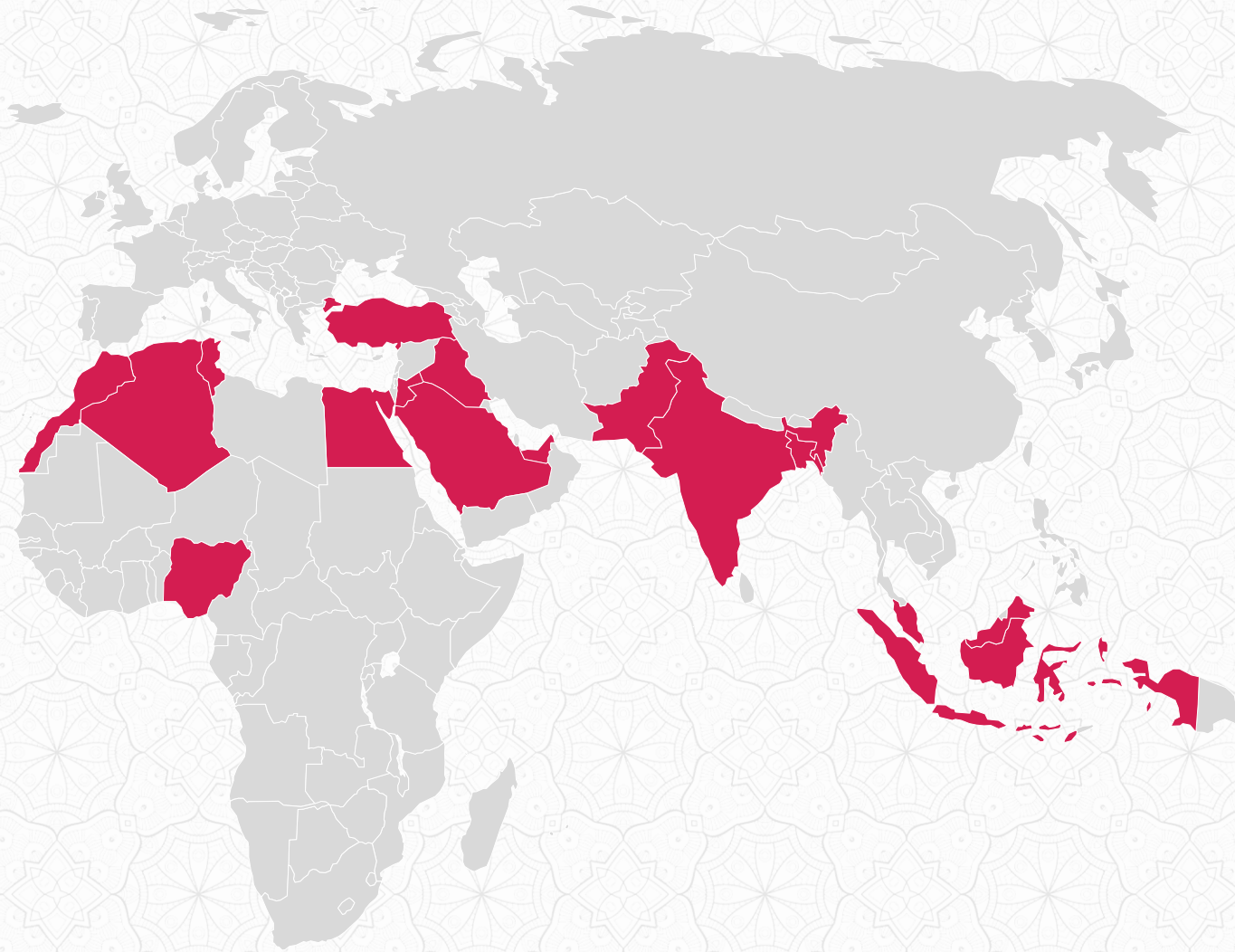


About the TGM Ramadan Global Survey

The TGM Ramadan International Survey aims to provide a better understanding of how retail customers behave during one of the most significant months in the Muslim world. The pandemic transformed a lot in terms of shopping and travel behaviours, and we wanted to capture the changes' size by commissioning world's largest Ramadan survey.

This study aimed to understand and capture the unique behaviour preceding the holy month of Ramadan and the impact. Our report shares with you detailed insights from consumers across the Muslim universe and how companies and marketers can connect during this time.

For the global average data cuts in this guide, we focused our analysis on the markets where most of the population celebrates Ramadan. We analyze only the part of the population who will be celebrating the holy month of Ramadan.



17

countries are compared in this report, clustered into regional

800

About 600 respondents were surveyed in each, apart from India, Kuwait, Lebanon Nigeria.

9611

is the total sample size of this report

TGM Research conducted this survey between the 20th and the 28th of March 2021 using internet-based polling. Country data was weighted to take country population structure aged between 18-50 into account.

Ramadan Rundown

This year, Ramadan will begin on April, 13th – 10 days before it did last year (April 23rd)

Ramadan is the 9th of the Muslim calendar and the holy month of fasting and spiritual purification.

It is a time of worship, cleansing and self-control. Muslims during this month increase acts of worship through prayers, fasting, charity and good behaviour in general. It starts and ends with the appearance of the crescent moon, which also symbolizes Ramadan. As the Muslim calendar year is shorter, Ramadan moves earlier by about 11 days a year as measured by the western Gregorian calendar; this means that it completes a cycle of all the seasons about once every 33 years.

MONTH OF RAMADAN

PRE-RAMADAN



1-12
April

Time for Ramadan preparations, grocery shopping and adding a festive air to the household by decorating and preparing for the guests.

13th
April

Weeks 1-2



Beginning of Ramadan. Time for self-reflection and spiritual celebration.

Weeks 3-4

Atmosphere changes to celebration and entertainment. Beginning of preparations for Eid and closing of Ramadan.

14th
May



POST RAMADAN: EID-AL-FITR

Finally fast is over. Traditionally a gifting and travelling season, with high intensity and excitement



Ramadan Celebrations In 2021

How is Ramadan going to look like this year?

What is the outlook for Ramadan in 2021?

Last year Ramadan celebrations were different in many ways. In 2021 it will still far from normal.

A month of self-reflection and spiritual growth, Ramadan also sees significant shifts in daily routines, purchasing patterns, content consumption habits, and conversations. However, the Coronavirus pandemic has presented a unique set of challenges. There has been an immense shift in consumer expectations and demands, as well as an adjustment to people's purchasing and family-oriented behaviors compared with previous years.

Ramadan at home without the traditions such as traveling to hometown and family gatherings make several categories that are no longer relevant, seem to reduce ad spending; among them are beauty and fashion, cigarettes and traveling.

Even though in last year's Ramadan period, consumers did more "stay at home" activities, brands can still take advantage of this behavioral shift to keep communicating with them. They can do this by balancing the brand's goals and being creative to gain consumer trust, as well as prepare for the new normal.



**98% of Muslims
celebrate
Ramadan**

Ramadan celebrations

Ramadan will be different compared to previous years ones on many levels

2 of 3

Will increase worship at the time of Ramadan focusing on self-reflection

51%

Only will travel to their hometown to spend Ramadan with their family

68%

Muslims had their Ramadan celebrations impacted because of COVID-19.

In Ramadan, people will be leaning to talking less, changing sleeping and eating habits due to increased worship activities; all of which would lead individuals to go about doing things differently, instilling a sense of patience and perseverance to perform daily activities under new conditions and building a stronger character. COVID-19 will still impact Ramadan this year as well, where most people's habits will be different from usual.

This Ramadan will be different

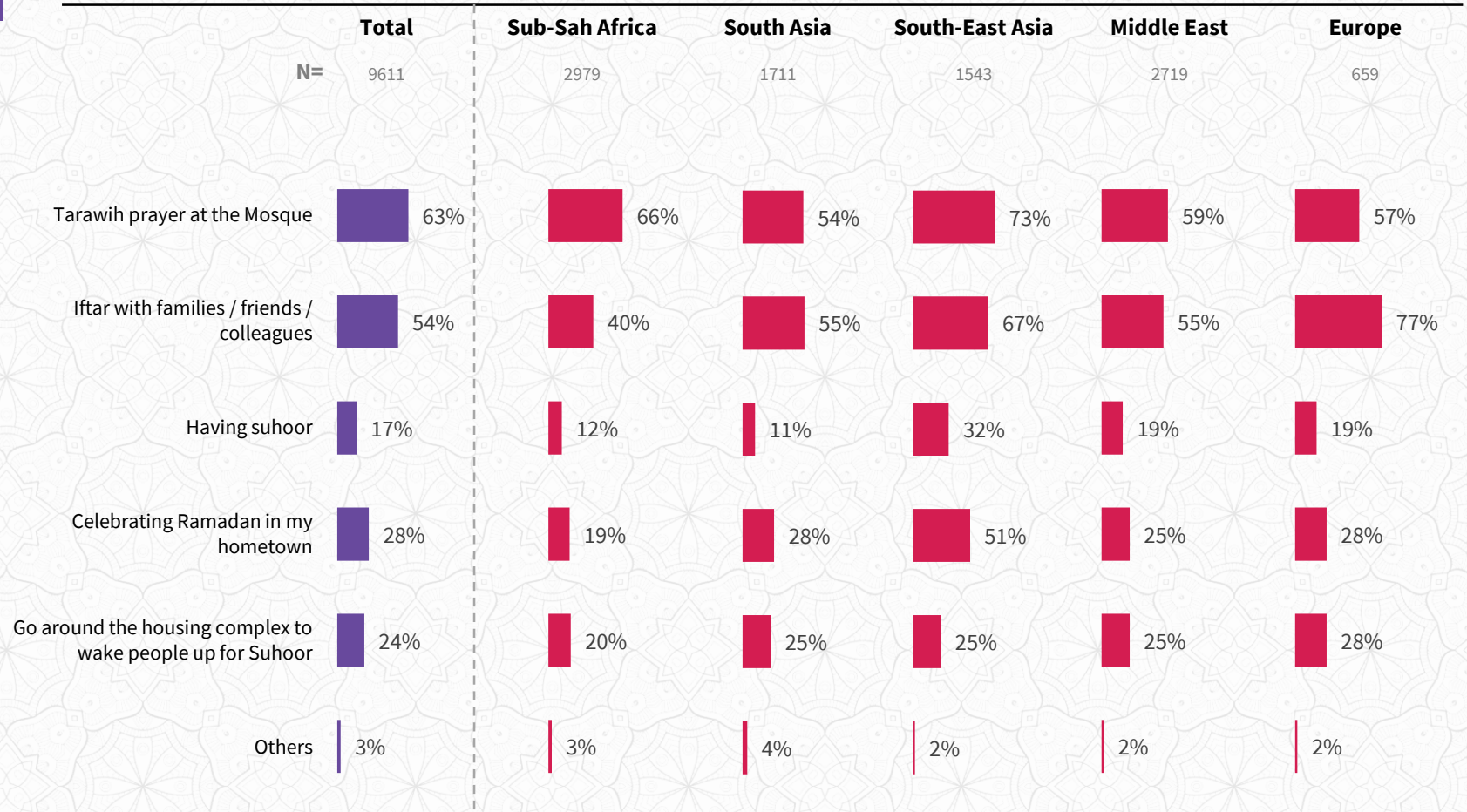
In face of COVID pandemic, multiple traditional Ramadan activities will be affected this year.

Prayers at the mosque were restricted last Ramadan. Muslims were not able to pray Tarawih last year due to the closure of mosques. In most countries, the Tarawih prayer was canceled or faced severe limitations. This year, however, things are starting to open up with certain conditions. In some countries, mosques that can host more than 1000 people will be open to the public. Men & women will be able to pray Tarawih, while children will stay home and will not be allowed at the mosque to limit the spread.

Iftar will also be less celebratory this year. There will be a limit to how many people can meet. Pre COVID communal sessions will be severely impacted this year.

According to the results from TGM Ramadan International Survey, a number of activities are mostly affected. More than 65% of Europeans & South Asians will miss their Iftar time with families/friends/colleagues due to the COVID situation. The pandemic reshaped how the Muslim community prepares for, lives, and celebrates the holy month

What Ramadan activities will be affected by the COVID this year?



- Source: Ramadan 2021 – 21030200
- What activities will you miss during the Ramadan celebration due to the Covid19 pandemic?
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

94% claim that they will fast this year.

Fasting is one of the most important parts of the Ramadan celebration. The fast is broken every evening with a communal evening meal or Iftar.

Families get together each evening when the sun sets to break the fast. They would often stay up to the early hours of the morning enjoying time with family and friends. However, that has been disrupted this year by the one-visitor rule as part of the coronavirus restrictions in some countries.

More than 90% of Muslims will be fasting this upcoming Ramadan. It is the biggest cultural season during which Muslim communities unite on a journey of spirituality and compassion. Daily gatherings, community prayers, charity events, and iftar or suhoor outings make Ramadan the month all Muslims look forward to.

Will you be fasting this Ramadan 2021?

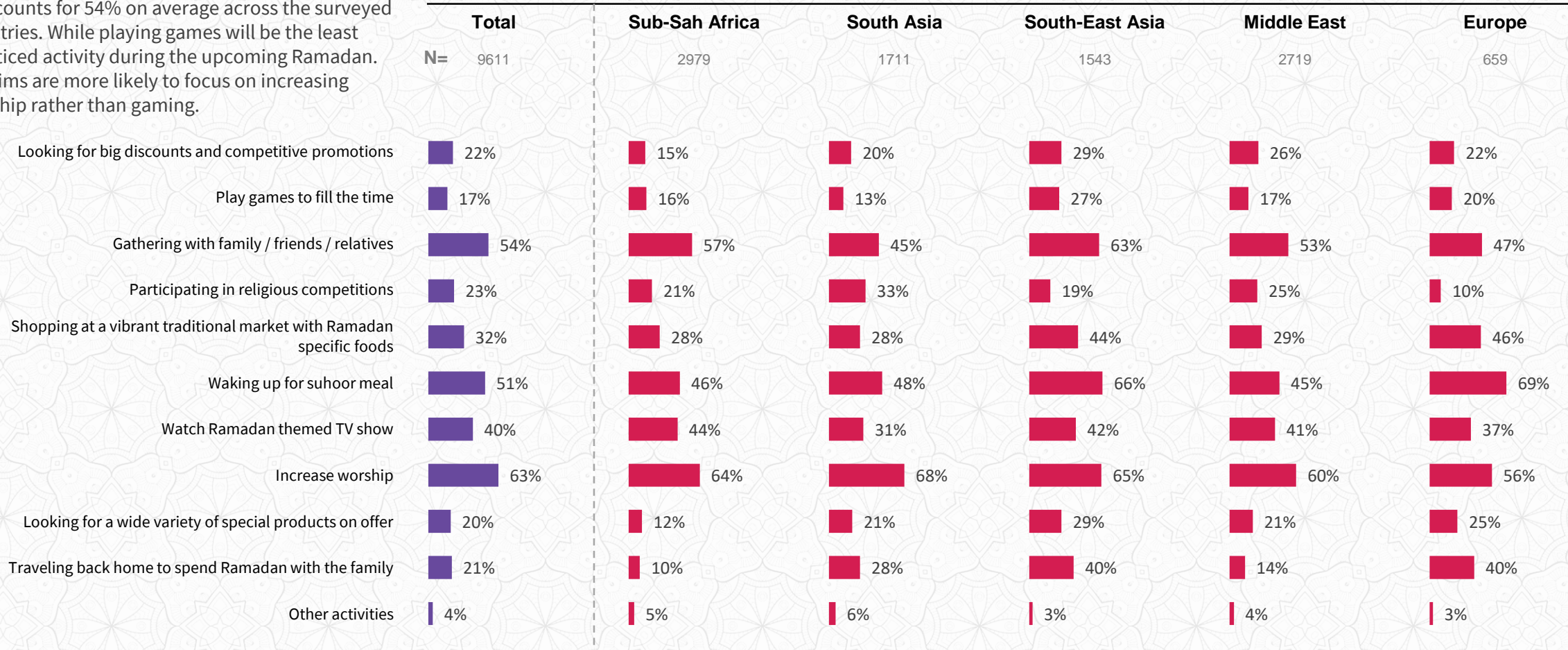


- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

Spiritual and family celebration is the upmost importance

Gathering with family/friends/relatives will be the most dominated activity for the upcoming Ramadan. It accounts for 54% on average across the surveyed countries. While playing games will be the least practiced activity during the upcoming Ramadan. Muslims are more likely to focus on increasing worship rather than gaming.

Which activities do you plan to do for the upcoming Ramadan?



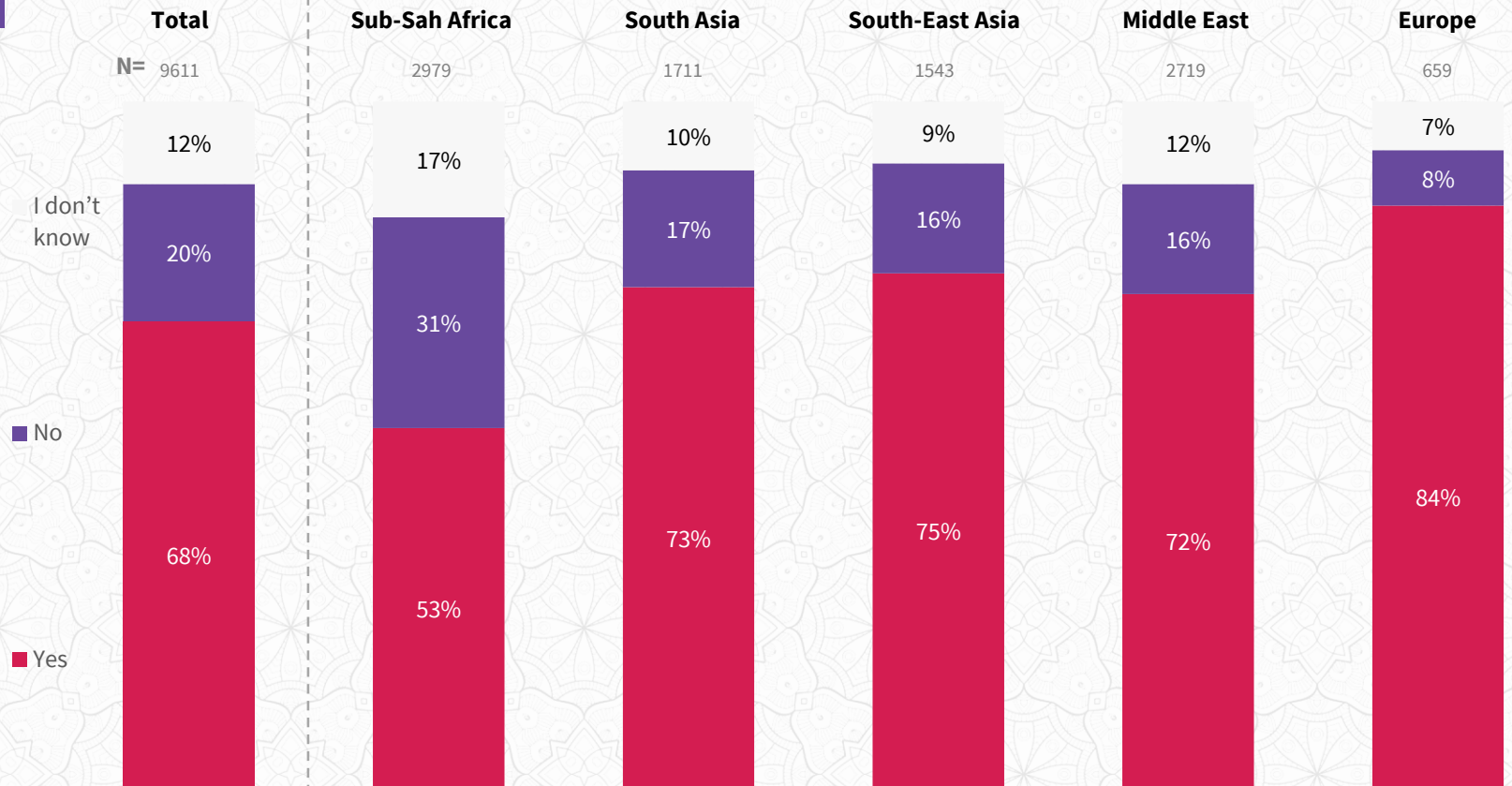
• Source: Ramadan 2021 - 21030200
 • Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

2 out of 3 Muslims will have their Eid Al Fitr celebrations impacted by the COVID pandemic

It's been a tough year for everyone, with multiple restrictions imposed and forced changes. There is a ray of hope in 2021, however, the Ramadan celebration will still be far from ordinary.

Eid visitations were not permitted last year. Governments went as far as banning travel between provinces and disallowing people to return home during the Eid Al Fitr holidays. In 2021, as the Covid-19 pandemic is still raging, families in many countries are prevented from visiting each other. Families interacted with each other often through phone calls or online video chats. However, Now that restrictions are gradually getting lifted this year, families may start to see each other more, but still with severe limitations related to physical transportation

Will pandemic restrictions affect your ability to celebrate Eid this year?



- Source: Ramadan 2021 – 21030200
- Do you think that Covid restrictions will affect your ability to celebrate Eid in your country this year
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

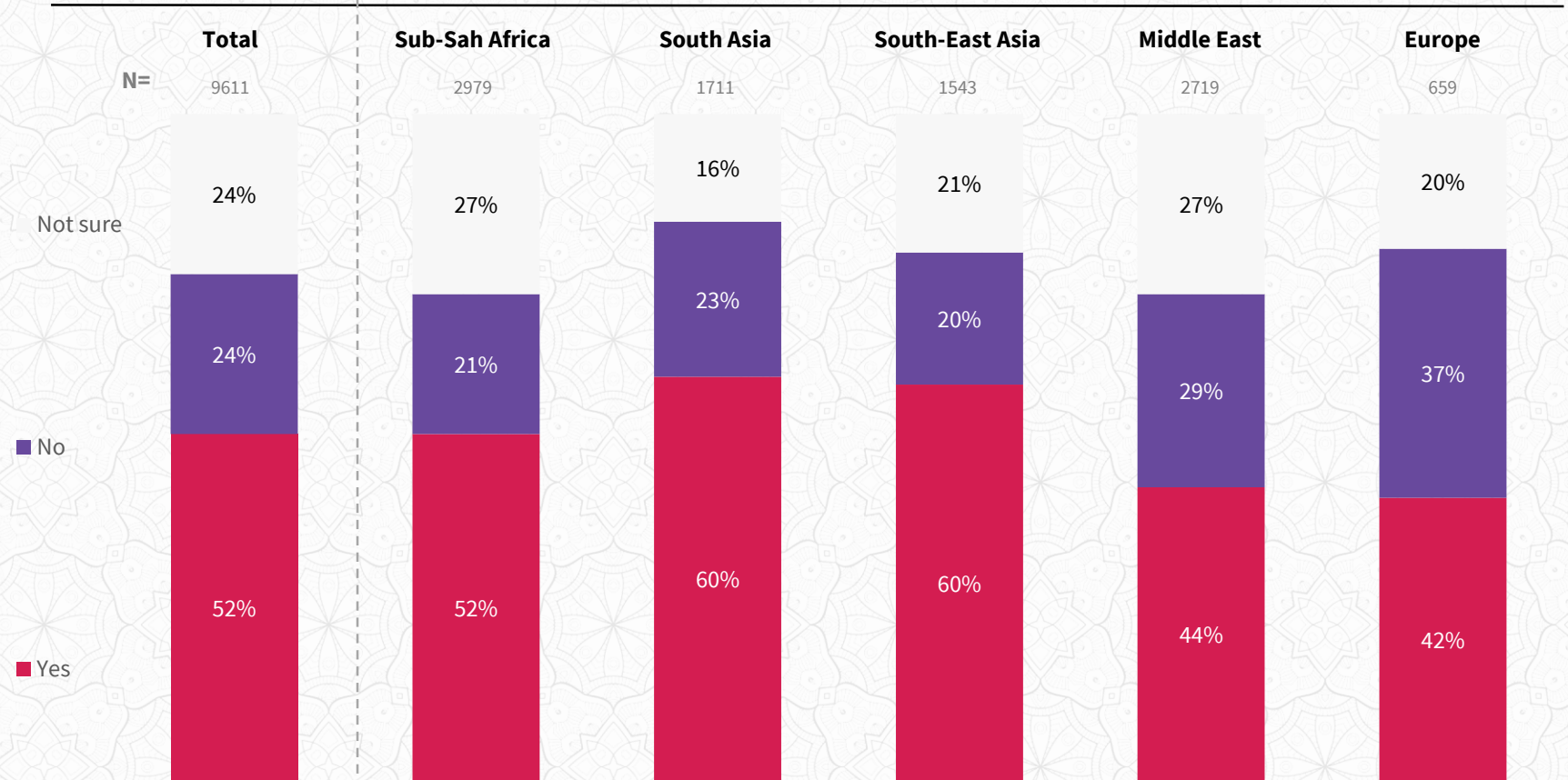
There is still a lot of uncertainty about travelling during Ramadan

Traveling back to the hometown for communal celebration during Ramadan is one of the highlights Muslims are looking forward to every year.

Muslims will most likely spend Ramadan very differently than usual. Worshippers will have to have suhoor, or pre-fast meal, and iftar -- the fast-breaking meal, individually or with family. The Eid prayer, held at the end of the month in massive open spaces, mosques, or fields were not permitted. Additionally, the government decided to prohibit people from returning to their hometowns in order to prevent the spread of COVID-19 in various regions.

There is a lot of uncertainty regarding traveling plans, reflected by the large volume of the group still not sure whether they will have a chance to get back to their hometown during Ramadan or not. Even with the expressed intentions of 1 out of 2 Muslims willing to travel back to their hometown, with travel limitations still holding up, it may be hard to make these plans come true.

Do you have plans to go to your hometown in the upcoming Ramadan or Eid al-Fitr?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

If travelling, preparations will take place in very last moment

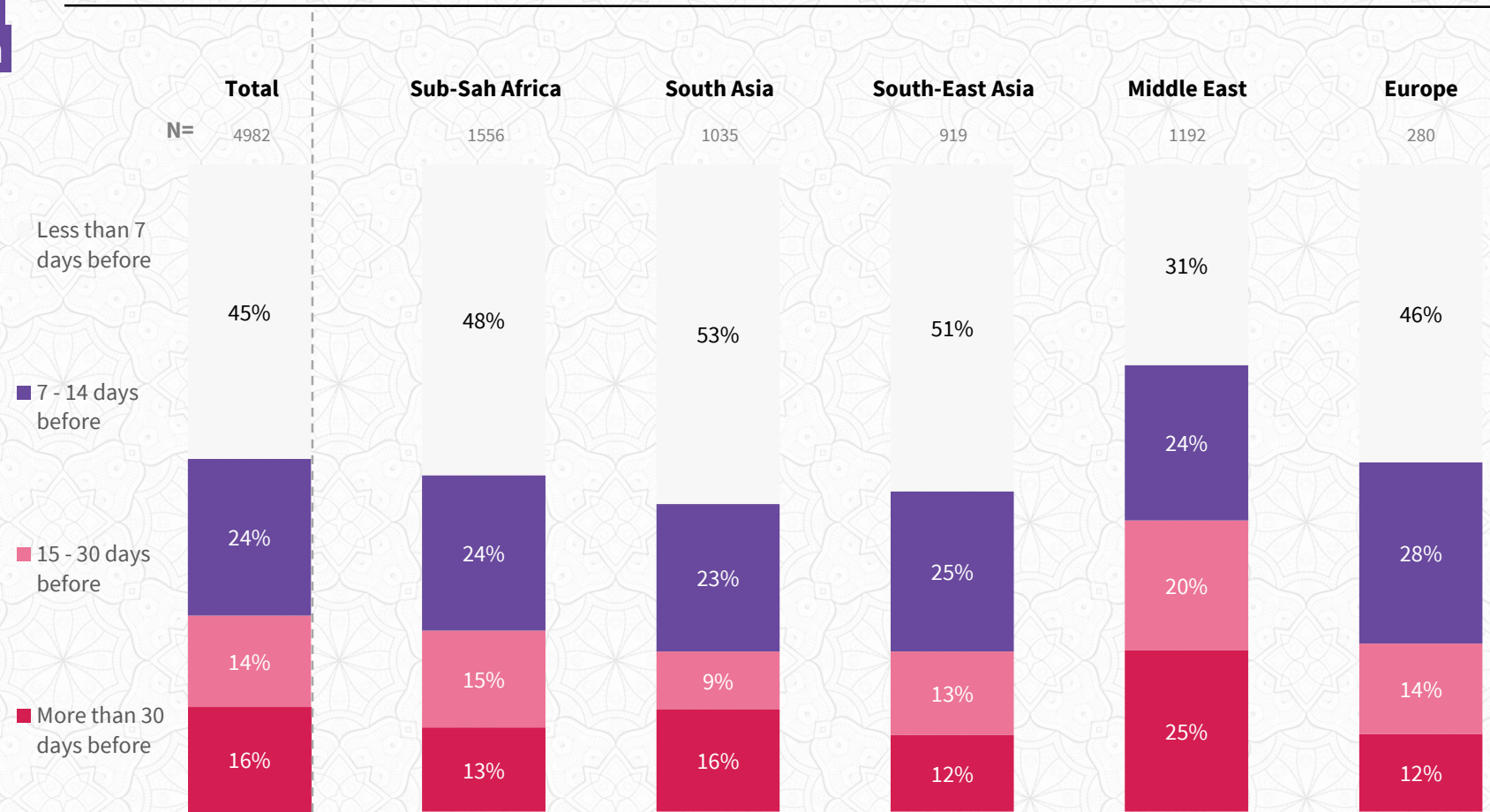
Preparations which denotes booking tickets and making other related arrangements will happen only days before the expected date.

As situation is changing dynamically a lot of people are waiting with their definite commitments to the very last moment.

More than 40% of Muslims make preparations to travel to their hometown in less than a week. This behavior happens due to uncertainty revolving around travel restrictions, travel documents and health-check status.

This behavior happens because of the pandemic, since most Indonesian, for example, plan at least for two weeks, up to 1 month, before they travel to their hometown to celebrate Ramadan.

How many days before traveling will you start your preparation to go back to your hometown?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(4982), Sub-Sah Africa n=(1556), South Asia n=(1035), South-East Asia n=(919), Middle East n=(1192), Europe n=(280)



Ramadan and Consumers

What is the effect of Ramadan on the household budget? How will it be different this year?

Consumer Spending for Ramadan in 2021

Ramadan is about spending precious time with friends and family for many people rather than spending a lot of money on gifts by itself. However, with the pressure to buy also a reality, examining the budget is also important. During Ramadan, people are looking to celebrate and purchase gifts for their close ones, cook delicious meals for those they love, dress up and look their best for Eid. There is a significant increase in sales during the Ramadan month, particularly in the last couple of weeks before Eid-al Fitr.

Travel sales also used to get a boost during Ramadan, with the rise in bookings starting to happen during last Ramadan weeks, peaking in the days after Eid-al Fitr. It is also the time when people look to make bookings and travel for their upcoming summer holidays. However, with the COVID pandemic, it may not be the case.

Nearing the end of Ramadan, close to Eid, hairdressers, clothes shops and possibly perfume shops will be busy as people will get ready to celebrate Eid. People may buy Eid clothes before Ramadan even start to avoid paying more than the product is worth (greedy vendors may take advantage of Eid approaching and this, again, depends on the country). Families may also buy materials to prepare Eid sweets, or they may buy them already made from designated stores.



1 of 3 will increase their Ramadan gifting budget this year



The advent of Ramadan e-commerce is in

1 of 4

Will be proactively seeking for Ramadan oriented promotions and big discounts

25%

Will spend less this year on Ramadan gifts

42%

Bought something online in last 7 days

Only 25% of people are looking for promotions and big discounts in the upcoming Ramadan. It seems that people need to be more attracted to appealing Ramadan-oriented ads. Furthermore, spending allocation to Ramadan gifts will be much lesser than before.

Consumers are seeking additional opportunities, ready to spend more after 1 year of turbulence

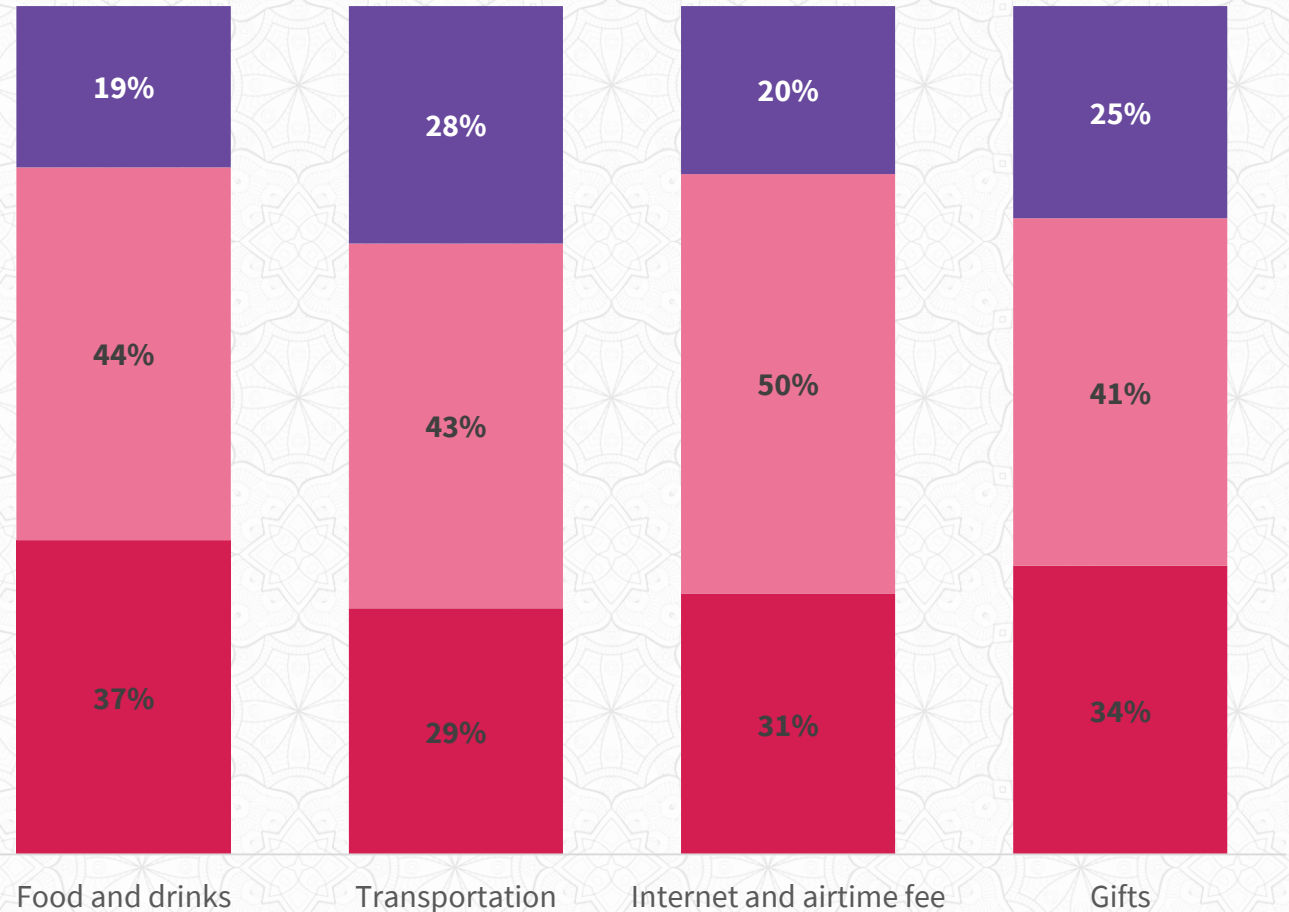
The category impacted the most this year will be unsurprisingly transportation. With all the restrictions in place, 28% will spend less on transportation-related expenses this Ramadan.

Traditional gifts for Eid and Food related expenses tend to increase compared with the last year. The TGM Ramadan International Survey reveals that nearly 40% of Muslims will spend more on Food and Drinks for the upcoming Ramadan 2021.

In countries where Muslims are the majority, consumption increases during this month of restraint. Traditions that spur consumerism during Ramadan and preparations for Eid Fitr, nearing the end of Ramadan, drive this trend. People spend more during Ramadan – mainly on food and beverages but also on other gifts-related. Mostly, there will be high inflation during Ramadan. Prices for transportation and food usually rise during the holy month.

How much will you spend in the upcoming Ramadan vs last year on:

- I will spend less for the upcoming Ramadan 2021
- I will spend about the same for the upcoming Ramadan 2021
- I will spend more for the upcoming Ramadan 2021



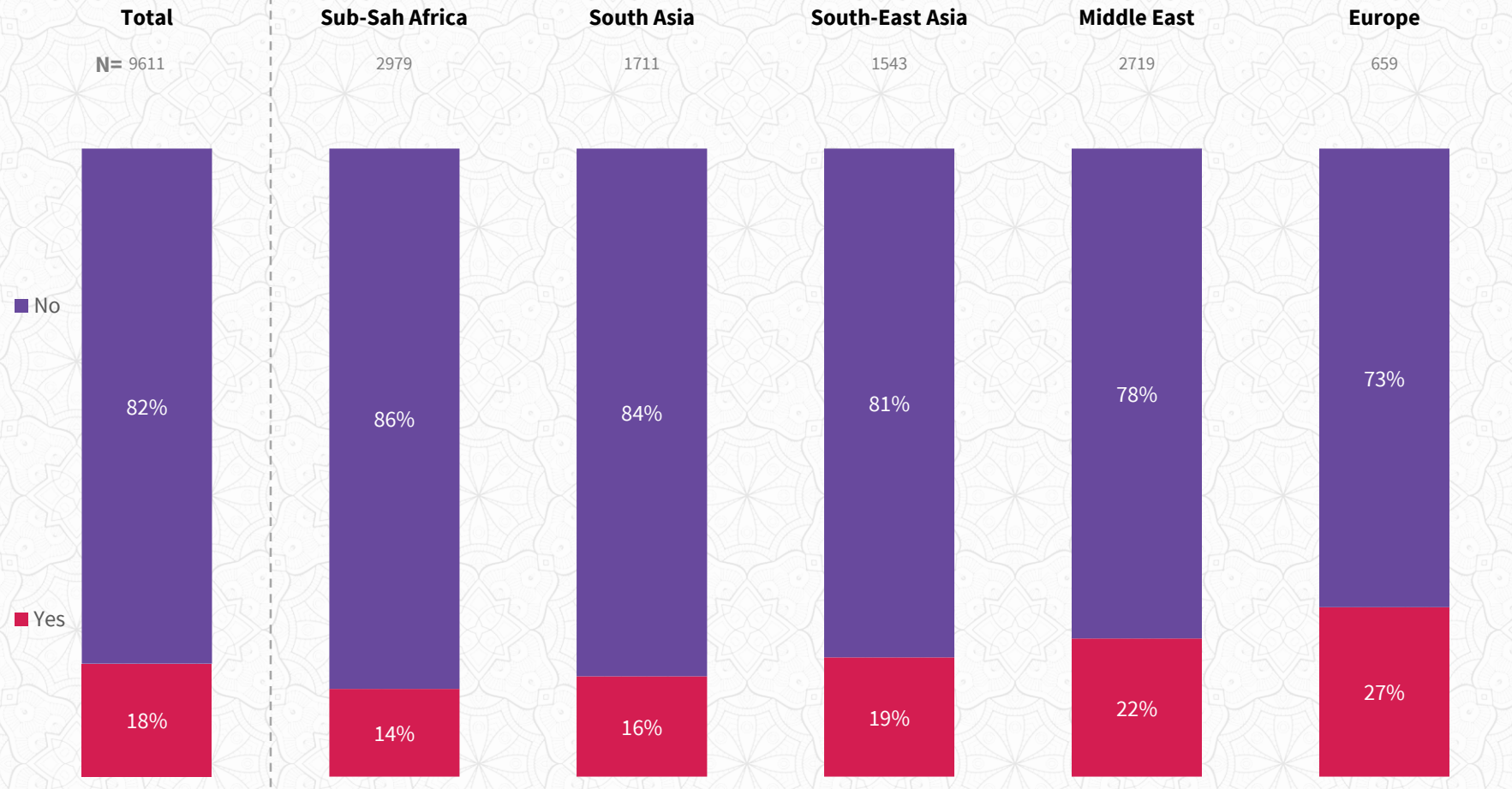
1 out of 5 will seek additional financing to support Ramadan related expenses

The period of Ramadan brings a lot of additional expenses. Consumer loans will increase during the holy month of Ramadan.

Personal loans and credit card issuance traditionally increase as a result of increased consumer spending during the month. Almost 1/5th will seek for options to support their household budget with additional financing.

Based on data collected by TGM Ramadan International Survey, 12% Moroccans, 11% Tunisians and 9% Algerians will consider taking credit / bank / fintech loans in advance to cover Ramadan expenses.

Do you have any plans to take a credit / bank loan to cover your Ramadan 2021 related expenses?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

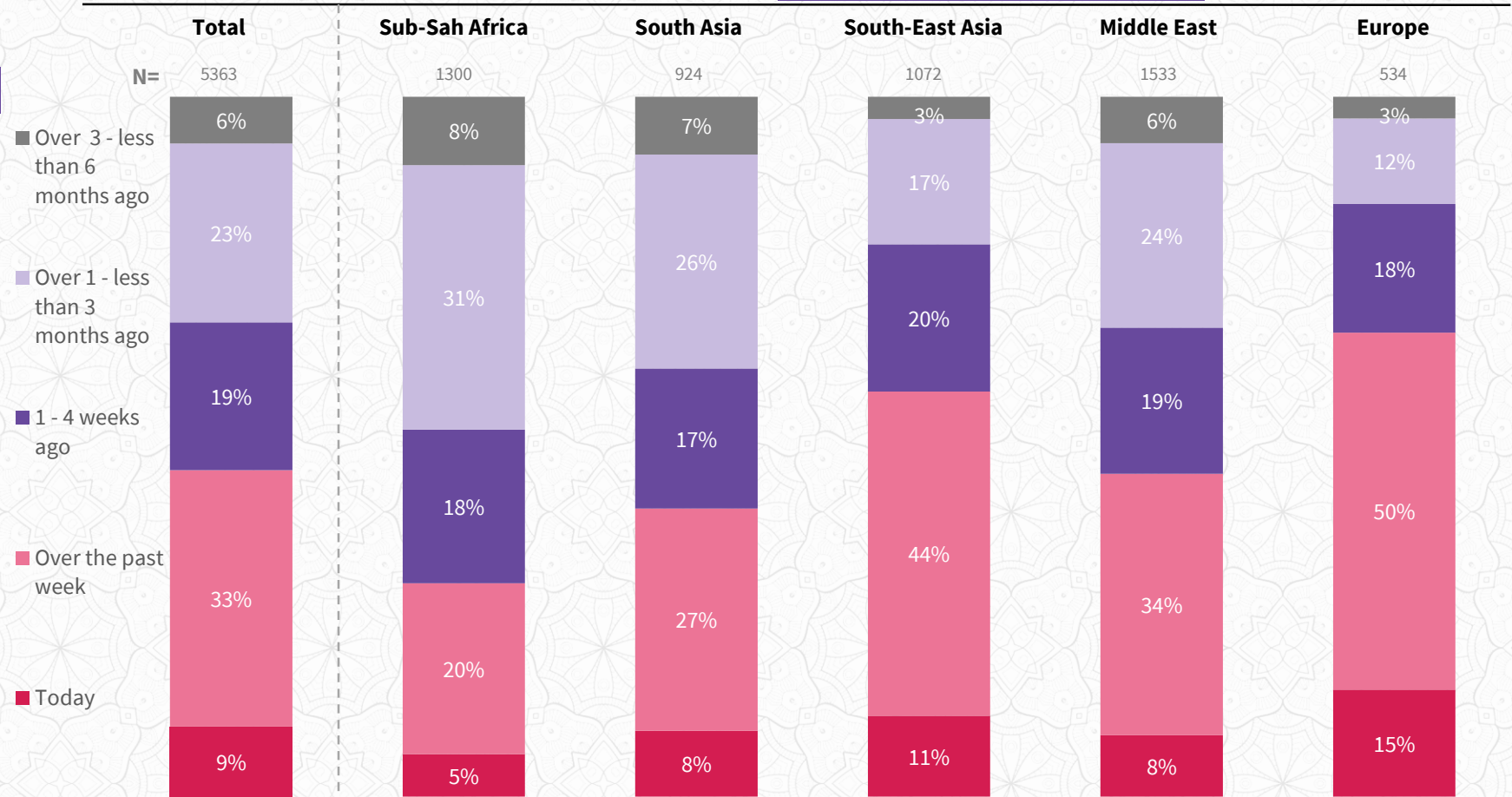
40% are already using online purchases on regular basis

Last year brought multiple shifts in consumer behavior due to the pandemic, forcing people to start using e-commerce more than before.

Ramadan is the biggest shopping period in MENA when compared with Black Friday or Super Bowl. While the super bowl is a one-day event, Ramadan extends for a month – bound to have its own implications.

The advent of online shopping is not surprising. Besides the social distancing factor, much of this frequency increase comes down to people feeling safer when shopping online as opposed to visiting physical stores. With such a significant increase in online shopping penetration, retailers and brands must ensure that they deliver an online shopping experience that is convenient and user-friendly as more people opt to shop online.

When was the last time you bought something online?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(5363), Sub-Sah Africa n=(1300), South Asia n=(924), South-East Asia n=(1072), Middle East n=(1533), Europe n=(534)

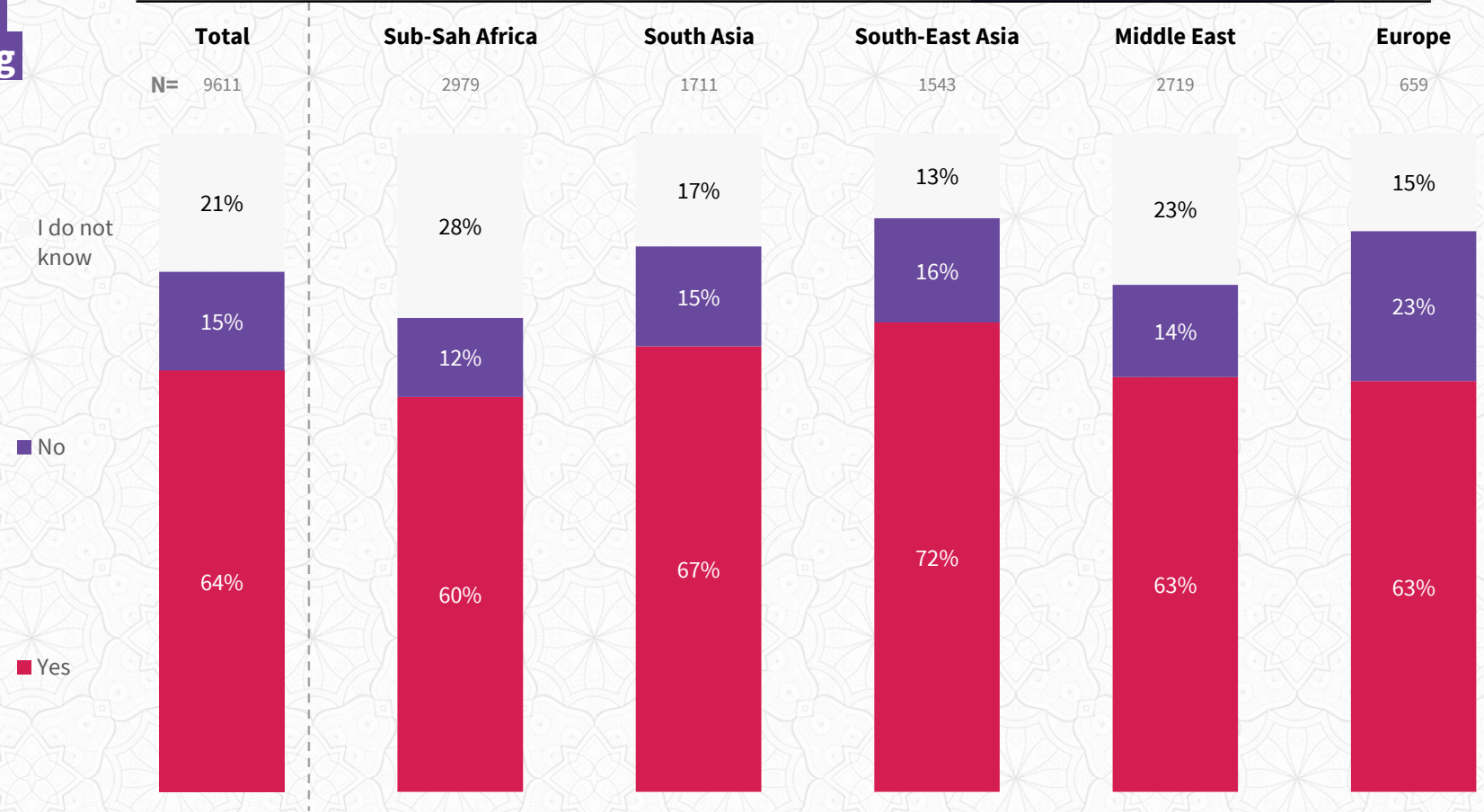
Ramadan brings unique marketing opportunities. It is important to understand how to tap into them.

Over 2/3 of Muslims are seeking brands communicating with them in a way that denotes an understanding of their faith

Marketers should always pay attention when determining what ad messaging to convey during Ramadan and ensure their ads are always respectful toward Muslim tradition and culture.

It is not hard to go wrong when it comes to advertising to potential Muslim consumers. Brands need to be aware of cultural and religious sensitivities to ensure that ads will not be offensive. Brands need to use proper cultural insight and local knowledge to tailor their campaigns to the desires of multiple segments. Also, to enhance overall appeal, brands have to take into consideration the fact that Muslims are not homogenous across markets.

It is important for me that brands understand my faith?



• Source: Ramadan 2021 - 21030200
 • Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

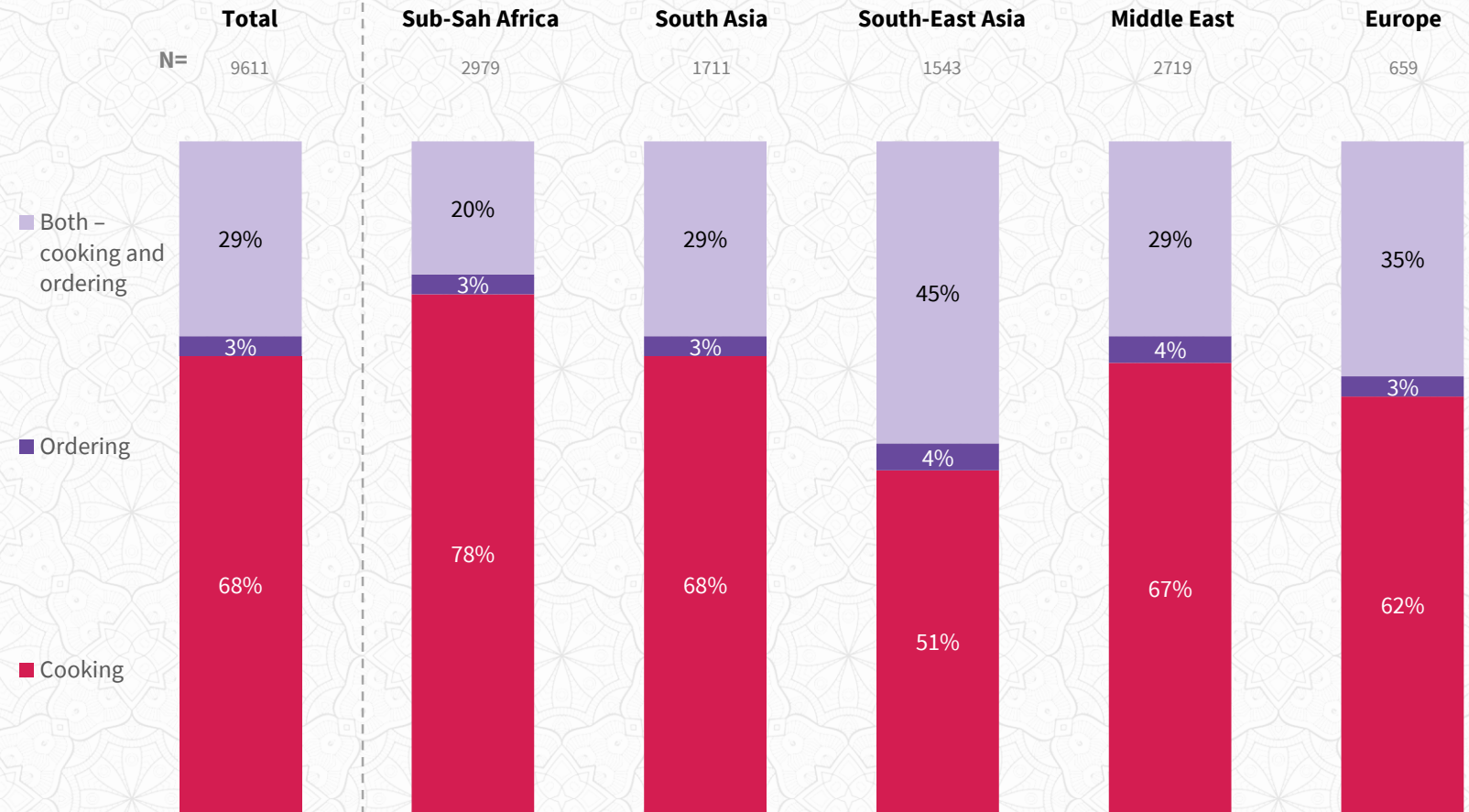
Ramadan will be even more driven by convenience this year. Southeast Asia leads this trend.

Without having experienced Ramadan, one may assume food consumption would decrease since it is a month of fasting; this is not the case.

Food consumption surges during the holy month of Ramadan as families feast in the evenings after hours of fasting. Shopping will mainly revolve around food during this month. Ramadan is a time where consumers tend to spend more on gourmet dishes and imported foods to cherish the social aspect of eating through Iftar. However, fewer meals are now entirely prepared at home as consumers increasingly seek convenience.

As a result, Fast Food and food delivery is a rapidly growing category during Ramadan. Families increasingly shift from traditional meals to prepared ones allowing families that do not have time to cook to celebrate the season.

When you eat at home during Ramadan, where do you get your food from?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

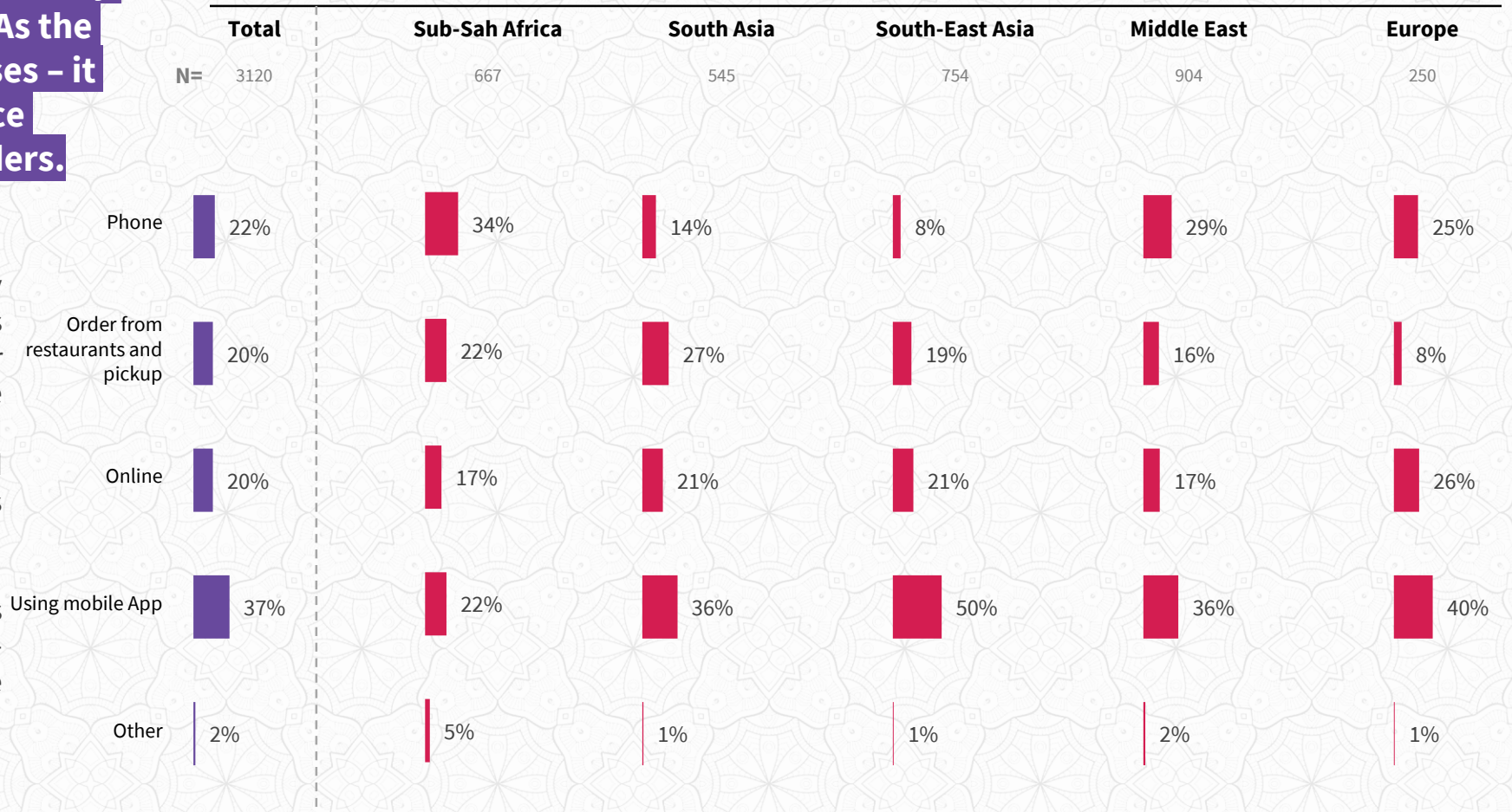
Mobile apps are the tool of choice nowadays when ordering food during Ramadan

Again, convenience is currently the key driver for consumer behaviour. As the smartphone penetration increases – it also becomes the device of choice when making Ramadan food orders.

With the growth of usage of food delivery options available via mobile, it becomes more common to use it as a key tool for making food orders. Especially in more developed markets such as Indonesia and Malaysia with high usage of GOJEK and Grab, this one becomes the obvious choice.

While in markets where e-commerce is still in the nascent stage, such as Sub-Saharan Africa, phone ordering is still the most preferred method.

How do you order food when eating at home most often?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(3120), Sub-Sah Africa n=(667), South Asia n=(545), South-East Asia n=(754), Middle East n=(904), Europe n=(250)



29% will increase their mobile use during Ramadan

Media usage during Ramadan

Ramadan is a time for self-reflection, growth and strengthening family ties. It is also a time of increased content consumption. During Ramadan, people look to technology, especially mobile, to stay up-to-date and connect with loved ones. Mobile is also used to shop and for entertainment.

Last year, due to pandemic restrictions, people turned more to their digital devices to connect. Mobile has become the constant companion, driving additional time spent on the small screen. Increased use of mobile does not mean that traditional media will entirely lose its significance; It is still a tool of family socializing.

A common myth is that people refrain from watching content that does not fit the spirit of Ramadan. However, in reality, they may watch whatever is popular or interesting. Religious programs will play throughout the day, TV shows play at night, and comedy programs may play during or slightly after the iftar.

Smartphone usage patterns will be different during the Holy Month of Ramadan

Smartphone usage has significantly increased during the pandemic. With it also being the primary device to connect to the internet, mobile as a medium is currently the most important channel to engage directly with consumers during the month of Ramadan.

With the many challenges brought by COVID-19, the digital space in 2021 became more crowded and noisier than ever before. At the same time, consumers' behaviours changed rapidly after having to adapt to new priorities and government restrictions.

To stay ahead, brands had to adapt quickly — tapping into current consumer insights to rethink the way they approach their Ramadan communications.

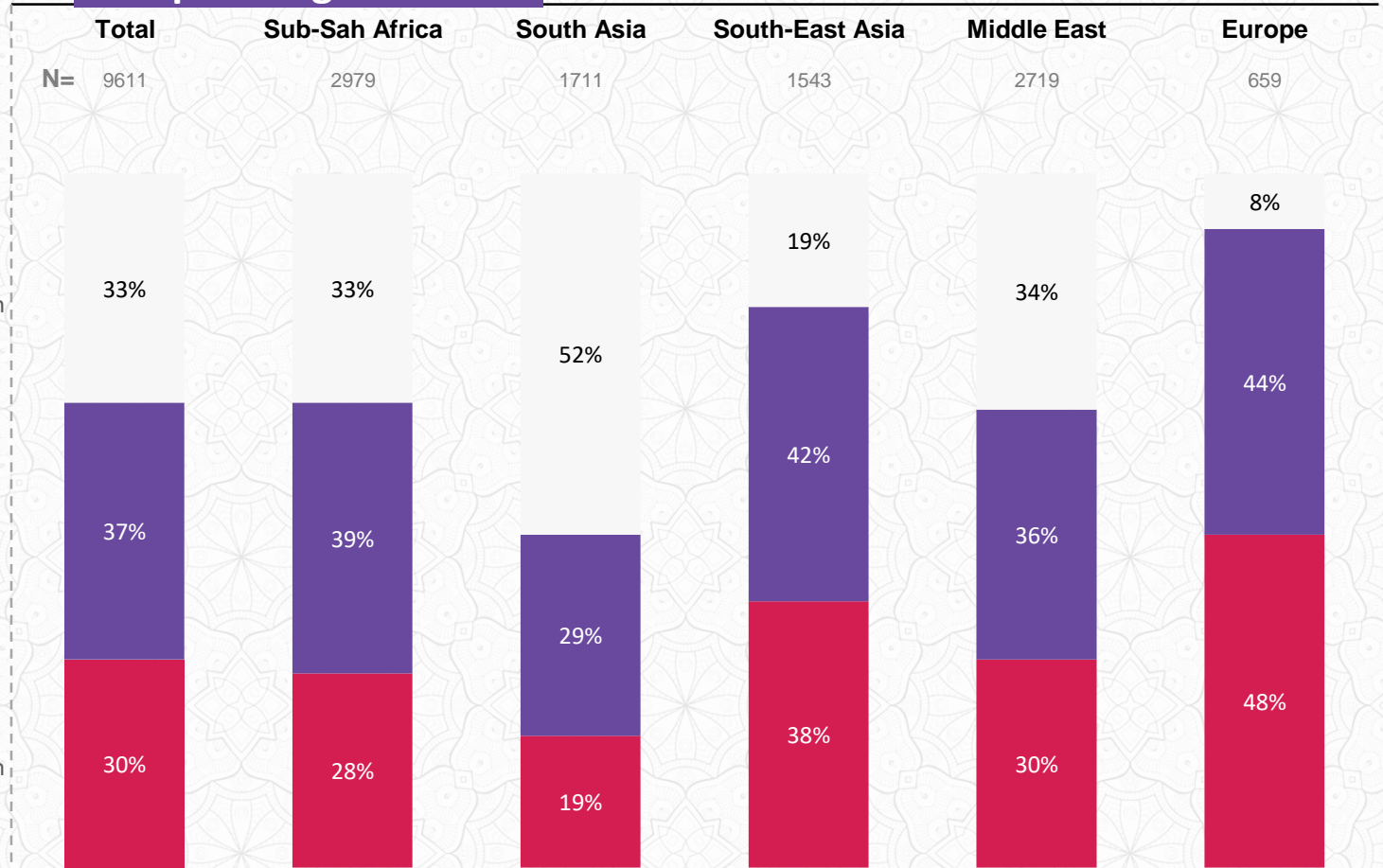
App market activity continued apace. It may be difficult to forecast how trends will impact Ramadan in 2021, as countries continue to ramp up vaccination efforts, and worshippers have had a year to adjust to social distancing. However, more than 30% will use their smartphone more during upcoming Ramadan.

I will use my smartphone less during the upcoming Ramadan compared to normal.

My smartphone usage will be the same during the upcoming Ramadan.

I will use my smartphone more during the upcoming Ramadan compared to normal.

Which statement best describes your smartphone's usage during the upcoming Ramadan?



• Source: Ramadan 2021 - 21030200
 • Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

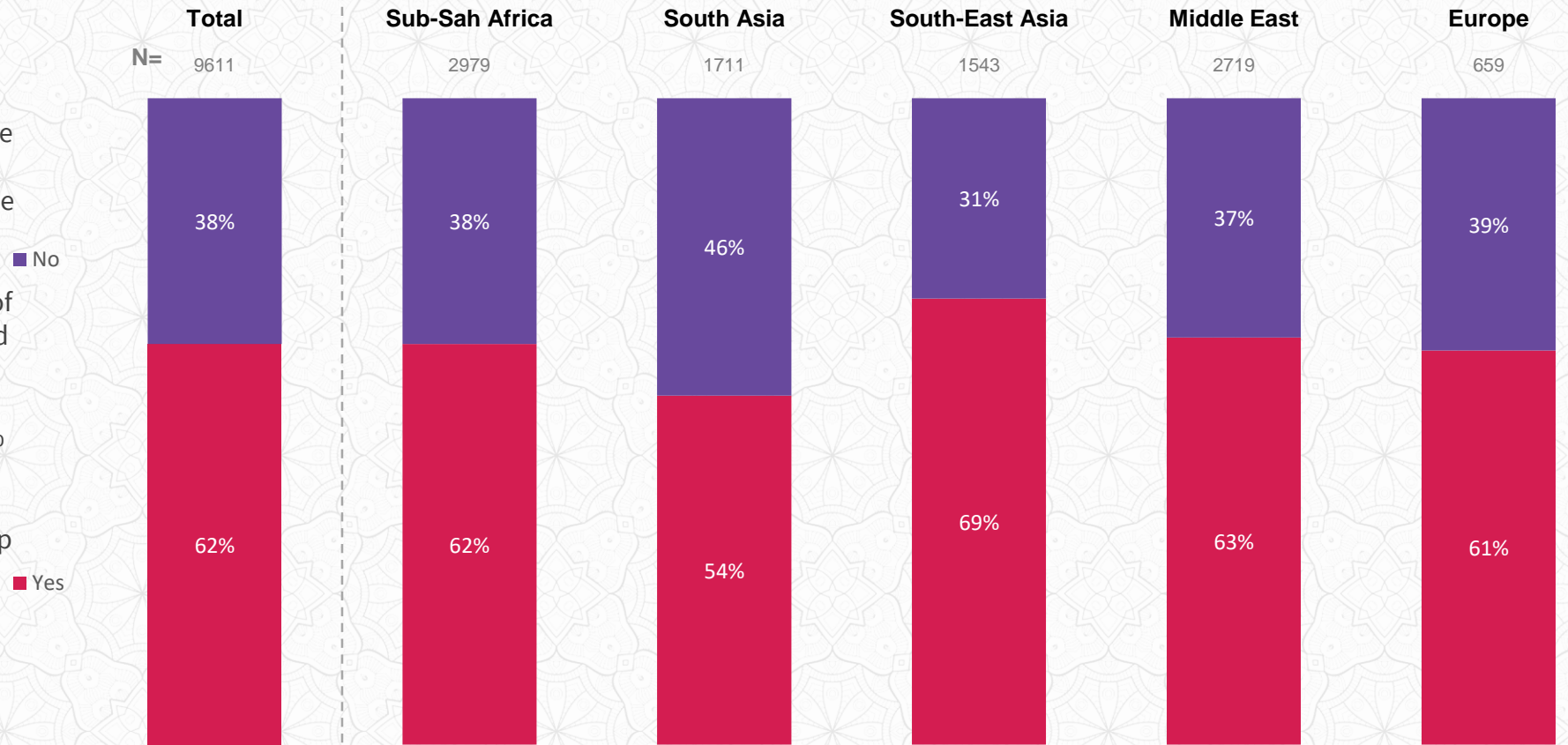
Ramadan is also an advent for new digital tools that help to feel connected and celebrate the faith

Muslim apps are determined to support Muslim people to enhance their faith.

For Muslims, Ramadan is one of the holiest months in the Islamic calendar. Millions of Muslims worldwide observe the month as they try to achieve spiritual discipline and purification during this time which lasts approximately 30 days.

In order to be productive, there are a lot of Muslim-oriented apps which people could consider downloading to help them during Ramadan. To help people stay on top of their daily Ramadan practices, 72% of the Emiratis we surveyed and 70% of Malaysians said they intend to use Muslim-oriented platforms. Having an app that reminds Muslims of accurate prayer times can be the difference between arranging work days and being stuck in traffic when the call to prayer rings over the mosque megaphones.

Do you plan on using any specific Muslim-oriented apps or websites during Ramadan that you do not usually use throughout the rest of the year



Source: Ramadan 2021 - 21030200
 Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)

Prospects for future. What is the outlook for the year ahead?

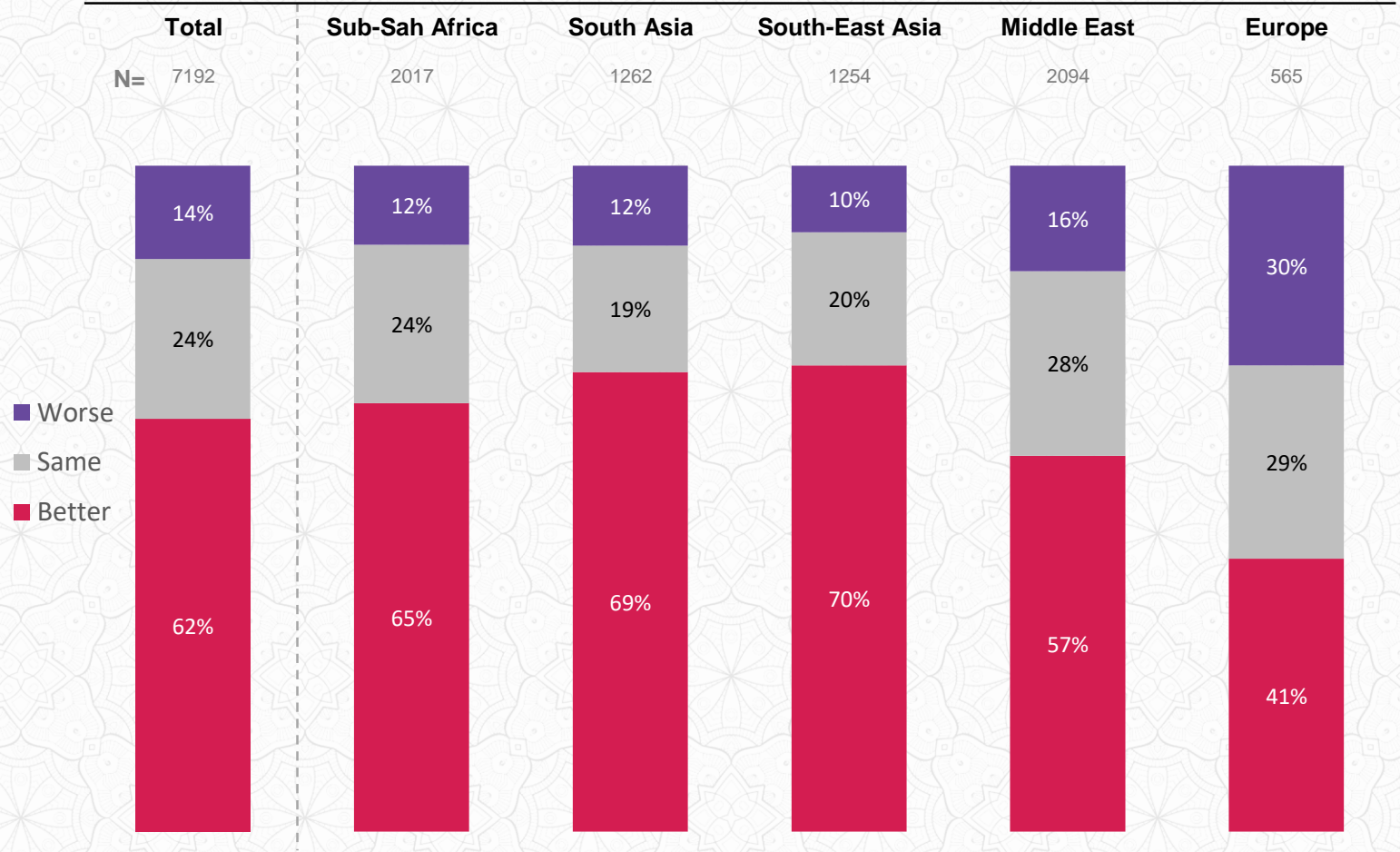
6 out of 10 people agree that 2021 will be much better than 2020. It's become an optimistic signal for people to embrace the year.

The pandemic still dominates the global economic outlook heading into 2021. 2021 will be the year of transition. Barring any unexpected catastrophes, individuals, businesses, and society can start to look forward to shaping their futures rather than just grinding through the present.

According to TGM Ramadan International Survey, only 41% Europeans assume that 2021 will be better, while more than 50% from other regions are more convinced that this year will be much better.

The COVID-19 crisis has created an imperative for people to reconfigure their life adjustment and an opportunity to transform them. To the extent that they do so, greater productivity will follow.

Do you think that 2021 will be better, worse, or the same as 2020?



- Source: Ramadan 2021 - 21030200
- Base: All respondents Total n=(9611), Sub-Sah Africa n=(2979), South Asia n=(1711), South-East Asia n=(1543), Middle East n=(2719), Europe n=(659)



Wrapping up

What are the key takeouts?



What are the key insights?

Significant impact on social celebrations

The pandemic reshaped how the Muslim community prepares for, lives, and celebrates the holy month. In the face of the COVID pandemic, multiple traditional Ramadan activities will be affected this year. Muslims mostly miss Tarawih prayer (63%) and Iftar time (65%) with friends and relatives.

Private and faith celebrations unaffected

More than 90% of Muslims will be fasting this upcoming Ramadan, claiming they will increase their private worship (63%)

General increase of Ramadan budget

Consumers are seeking additional opportunities, ready to spend more after one year of turbulence. The category impacted the most this year will be unsurprisingly transportation. With all the restrictions in place, 28% will spend less on transportation-related expenses this Ramadan.

Less spending on travelling, more on food

Traditional gifts for Eid and Food related expenses tend to increase compared with the last year. The TGM Ramadan International Survey reveals that nearly 40% of Muslims will spend more on Food and Drinks for Ramadan 2021.

When eating at home, more convenience this year.

Fewer meals are now entirely prepared at home as consumers increasingly seek convenience. 32% will be ordering food during Ramadan, with the mobile becoming the device of choice for food orders.

Optimism kicks in

The pandemic still dominates the global economic outlook heading into 2021. 2021 will be the year of transition. Barring any unexpected catastrophes, individuals, businesses, and society can start to look forward to shaping their futures rather than just grinding through the present. According to the TGM Ramadan International Survey, 6 out of 10 people agree that 2021 will be much better than 2020. It's become an optimistic signal for people to embrace the year.



Agile research for better decisions

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Our global team of consultants blend people expertise and technology experience to build insight solutions that help drive incremental growth for our clients.

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