WHITEPAPER

AUGUST 2026

The Arabic digital consumer: behavior, preferences, and research implications.

THE CONSULTANTS MEA

WHITEPAPER | AUGUST 2026

The Arabic digital consumer: behavior, preferences, and research implications.

One of the most digitally active audiences in the world, and what research should focus on to understand it.

A pan-Arab campaign launches across six markets. Same creative, same message, translated to Modern Standard Arabic to maximise reach. The campaign performs strongly in Saudi Arabia and the UAE. It barely registers in Egypt. It misfires in Morocco. The brand team's read: "media mix issue."

The media mix wasn't the issue. The assumption that there was one Arabic consumer to talk to was the issue.

The pan-Arab consumer is a useful fiction for strategy decks and a poor one for the people the strategy is supposed to reach. The decks aggregate. The people inside the decks are not the same people, and don't behave as if they are.

Where the fiction is built

The pan-Arab frame doesn't usually originate in MENA. It originates upstream, in global strategy decks written for a region treated as a single coherent market. By the time the work lands locally, the strategic direction is already set: one positioning, one big idea, one creative platform. The MEA team's job, in this version of the process, is to "localise."

Localisation, as practiced, mostly means three things: translate to Arabic, swap the on-screen talent, adjust references. The strategy stays. The insight that drove the strategy was rarely about Arabic-speaking consumers in the first place.

This is where the cost lives. Not in the buying, where competent media teams in MEA already split by market and know the CPMs, the platform mix, the local supply. The cost lives in the brief that came in already shaped, in the strategy deck that already named the target, in the creative direction that already chose the emotional register. Local push-back at that stage is hard, because the work upstream looks finished.

What gets flattened

A few of the things that don't survive the pan-Arab frame, even after localisation:

> **Purchasing power.** A Saudi consumer's category spend in personal care can be four to six times a Moroccan consumer's, in the same category, for the same brand tier. The campaign that talks to one consumer about indulgence is talking past the other about access.

> **Media diet.** Egyptian consumers watch dramatically different content than Gulf consumers. The platforms overlap; the watching behaviour doesn't. Reach numbers can be identical, attention isn't.

> **Cultural reference points.** Humour in particular travels badly. An Egyptian joke lands as a non-sequitur in Riyadh. A Khaleeji reference is opaque in Casablanca. Generic "Arabic" creative tends to choose neither, and lands flat in all of them.

> **The role of family in decision-making.** Levantine consumers research individually and decide individually. Egyptian consumers research individually and decide with extended family. Saudi consumers do something else again, especially in higher-ticket categories. A "consider with someone you trust" message doesn't mean the same thing in each.

> **Trust in institutions.** A Moroccan consumer's relationship with a bank brand is shaped by entirely different history than an Emirati consumer's. The same brand message lands as confident or as patronising depending on which market hears it.

These are not subtle differences. They are first-order strategic variables. Treating them as second-order variations on a shared theme produces work that is technically pan-Arab and practically nowhere.

Where the data should be doing the work

The version of this conversation that actually changes outcomes is the one that happens before the strategy locks. It looks like this:

A regional team receives a global direction. Before "localising" it, they go back to the market with a specific question: *for this category, for this consumer, in our specific markets, is the strategic assumption underneath this direction true?* And then they look. Not at a pan-Arab tracker that confirms the global hypothesis at the regional level. At country-level evidence, in the dialect consumers actually use, with the cultural specificity that surfaces what makes Egypt different from KSA different from Morocco.

This kind of research is harder to scope and slower to sell internally than "we'll run a confirmatory study."

It produces inconvenient answers. It tells a regional team that the global strategy doesn't survive contact with the local consumer, which is uncomfortable to send back up the chain.

It also produces the work that actually performs. The brands quietly outpacing their peers in MENA are not usually the ones with the best localisation. They are the ones whose research function has earned enough credibility to push back on strategy before creative is in production.

What plural looks like

Country-level research isn't more research for its own sake. It's research scoped to a sharper question. A few principles we work with:

Field in dialect. A focus group in MSA produces stilted, defensive, half-honest answers. The same group in Egyptian Arabic, or Khaleeji, or Darija, produces the candid material that strategy is actually built on. This is operationally harder. It's worth it.

Each market read on its own first. A study that "covers" five countries with 200 respondents each treats four of them as confirmatory of the largest one. A study that runs 600 respondents in Egypt and 600 in KSA, separately analysed first and only then compared, produces two stories that a pooled analysis would have averaged into noise.

Plural strategy as the default output. The most useful deliverable is often "here's how we should show up in Egypt, and here's how we should show up in Saudi, and the two are not the same campaign in two languages." Harder to socialise internally. Produces better outcomes.

The harder conversation

The pan-Arab frame is comfortable because it maps neatly to the way most regional marketing teams are organised, budgeted, and reported on. Pushing against it means saying, to people who don't want to hear it, that the org chart and the consumer reality are not the same shape.

The role of a senior research partner is to say this out loud, with examples, before the strategy locks. To resist the temptation to deliver the deck the client wanted instead of the deck the consumer required. To make the country-level evidence credible enough that the regional team has the ammunition to push back, kindly and firmly, on the direction that came down.

The mess gets cleaned up at the brief, not at the launch. Deep insights, surfaced early, are the only thing that gets the strategy out of the way of the work.

The Consultants MEA is a senior research and decision-support practice based in Cairo, working across MENA's fastest-moving categories.