

Synovate Hotspots

UAE



synovate

Research reinvented

lifeto life



Bringing United Arab Emirates to life



Bringing UAE life to life

- This document is designed to give you an overview of the UAE, its people and some of the key issues and trends Synovate is observing in the country today.
- The core source of information is ‘LifeWorlds’ (Synovate’s ethnographic approach), but it is complemented with Synovate’s broader understanding of this country’s culture.
- Our discussion has three main parts:
 - “Big Ideas”: insights into Emirati culture and consumers
 - Implications for research
 - Data

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Section I: Big Ideas

Bringing the UAE to life: “Big Ideas”

Insights into Emirati culture and consumers

- A Minority in Their Own Land: Native Emiratis make up less than 15% of the UAE’s population. The UAE’s tremendous diversity makes it a true melting pot.
- Treasuring Tradition and Grappling with Change: As the UAE opens itself to the wider world, Emiratis are struggling with conflicting attitudes towards the rapid changes in their society. Emiratis take great pride in their traditions but at the same time aspire to many Western brands and technology.
- The Sport of Shopping: For Emiratis, shopping is not a utilitarian activity – it is a past-time and passion!

Bringing the UAE to life: “Big Ideas” Insights into Emirati culture and consumers

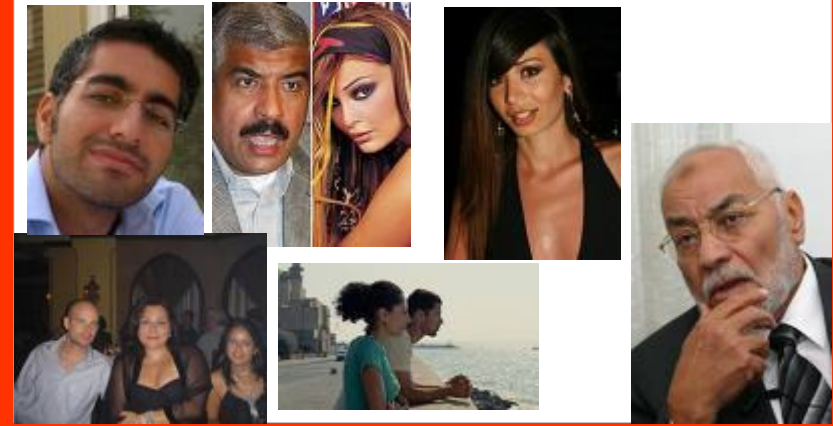
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- Treasuring Tradition and Grappling with Change
- The Sport of Shopping

A minority in their own Land: 4 main nationalities

Local Arabs: minority in own country (10-15% of population)



Expat Arabs: culturally closest to Locals (25-30% of population)



Westerners: high spending power minority (10% of population)



Asians: majority yet not "at home" (50% of population)





- Multi-cultural outlook:

- Emirati men and women wear traditional outfit in public and modern clothes at home or at informal home gatherings with friends.



- Non-Emiratis are free to wear as they wish: modern clothes (Westerners / Expat Arabs) or their own traditional clothes (Asians) as long as they don't wear anything that's too revealing so as not to be contravening with UAE's Muslim principles.



A true melting pot, where people coexist peacefully while maintaining own culture

- 220 nationalities registered in the UAE labour market
 - Synovate office has 17 nationalities for a staff of 35 people!
- Despite the amazing mix in business context, at a social level people of the same culture tend to stick together and mix rather rarely with the other cultures

Bringing the UAE to life: “Big Ideas” Insights into Emirati culture and consumers

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- The Sport of Shopping

UAE: Grappling with change and national identity

- Opening to the world brings about a **need to re-consider how to define themselves as a modern Arab nation.**
- Conflicting feelings towards change:

Pride for maintaining traditions, fear of changes through influence of Western values.



Modernity in material life welcomed. Western brands and technology are highly aspirational.



Strong roots in tradition

- In local dress



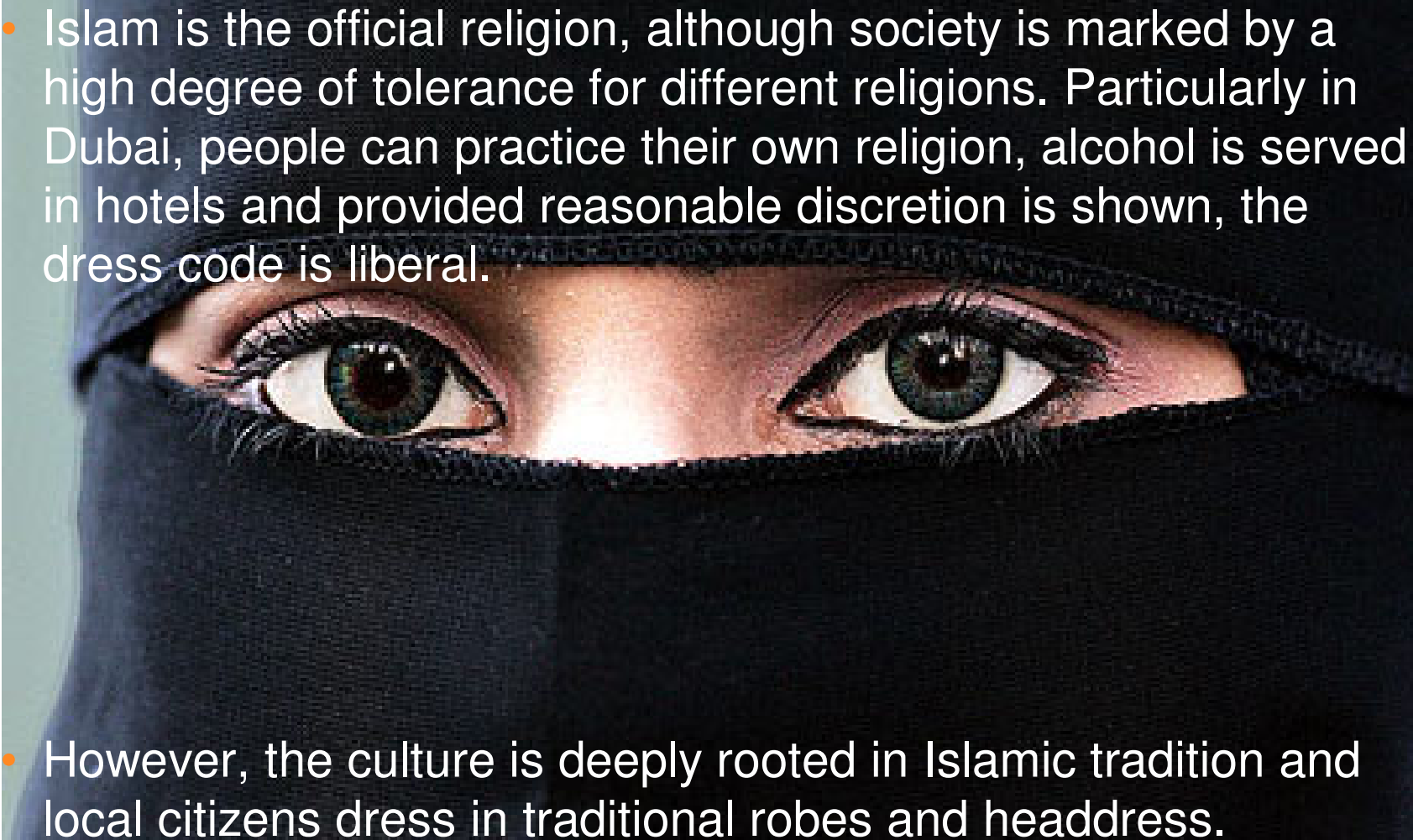
- In decoration



- In maintaining strong religious norms



Strong roots in traditional: Religion has a strong influence on everyday life

- Islam is the official religion, although society is marked by a high degree of tolerance for different religions. Particularly in Dubai, people can practice their own religion, alcohol is served in hotels and provided reasonable discretion is shown, the dress code is liberal.
- 
- However, the culture is deeply rooted in Islamic tradition and local citizens dress in traditional robes and headdress.

Yet developing at an amazing fast pace

- From a fisherman's village only 40 years back, to one of the most modern and talked of cities of the decade.



From this...



To this...



Dubai 2005



And it's not over yet ...

- The world's first shape-shifting building where each of the 80 floors rotate independently powered by wind turbines. The apartments are due for completion in 2010.



Bringing the UAE to life: “Big Ideas” Insights into Emirati culture and consumers

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- The Sport of Shopping: For Emiratis, shopping is not a utilitarian activity – it is a past-time and passion!

Shopping as a national past-time and passion

- Most frequent spare-time activity mentioned in the groups is always shopping
- UAE has Shopping festivals!
- UAE has some of the largest shopping malls in the world



Shopping is everywhere ... and locals love it!



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Section II: Implications for research



Implications for qualitative research: Multi-cultural / ethnic society

- UAE society is a true definition of a “melting pot”: it consists of a multitude of nationalities, from all over the world.
 - Larger number of groups need to be conducted to get insights from the various nationalities and mixing nationalities is not advisable since all have their different languages, attitudes, lifestyles and perceptions.
 - Asian & Western groups are conducted by an English-speaking moderator while locals & Expat Arabs by an Arabic speaker (exception sometimes happens with Expat Arabs depending on their backgrounds: socioeconomic class, education, etc.).
 - Despite the common Arabic language, it is not recommended to mix Local and Expat Arabs in the same group: expats tend to be more articulate, and monopolize the discussion, while locals tend to keep to themselves, and not express opinions in a mix audience.

Implications for qualitative research: Traditional society

- Locals tend to be very traditional and conservative and majority of the females do not mingle with males, especially strangers.
 - Not possible to mix male and female locals and in some cases it stands true for Expat Arabs – depending on the subject and socioeconomic class. However, it is not an issue with Asian and Westerners.
 - This also means that only female moderators need to conduct female groups.
 - Additionally when conducting in-home visits with females, it is much harder to get a male viewer inside (need to know way in advance, and even then it might be difficult). Same holds true for capturing any pictures, respondents need to be told beforehand and might accept it but they will never accept to have their picture taken – only the house and products they use.

Implications for qualitative research: Attitudes towards time

- Weekends and public holidays are sacred in UAE society, particularly Fridays. Also, most often people refuse to take time off work for research.
 - Research need to be conducted after working hours: starting 5 pm for locals who have shorter working hours because a great majority work in governmental institutes; 7 pm for the rest. Groups involving housewives can be conducted early in the day.
 - Research should ideally be conducted on weekdays (Sunday – Thursday), at the limit on Saturdays, never on Friday. Sometimes it is even a challenge to get respondents on Thursdays since Thursday evening is usually considered the start of the weekend and people aren't willing to give that up too.
 - The only fix public holidays in UAE are Jan. 1st (New Year) and Dec. 2nd (National UAE day)
 - There are several other important religious holidays, however they fall at different times each year and are only announced a couple of days in advance (as they are dependent on the moon phases).

Implications for qualitative research: Attitudes towards time (cont)

- People in UAE can be described as short-term planners and so it is difficult to get them to set a date weeks in advance. They are also very relaxed when it comes to arriving at a given appointment.
 - For that recruitment can only be done several days in advance and even then there is no guarantee that they would show up: high tendency for cancellations so have to over-recruit.
 - Need to be prepared to start FGDs – especially involving locals and Arabs –much later than the set time because of the late arrival of several respondents. (Our field managers try to reduce the possibility of this happening by given them an earlier time but still that doesn't always work!)



Implications for qualitative research: Dubai vs. Abu Dhabi

- The majority of the population is urban and lives in the two largest emirates – Dubai and Abu Dhabi. Dubai is usually seen as the centre of the UAE since it's the most famous and the pioneer when it comes to trends, products, malls & major attractions. Abu Dhabi is the capital city and is trying to catch up and excel Dubai.
 - Most research is done in Dubai but at some instances it is important to take into account insights of Abu Dhabi residents too.

Implications for qualitative research: Ramadan

- Ramadan is a very important part of the year for Muslims, where for 30 days they fast till sunset. The timings vary each year (in 2009 Ramadan is most likely between August 19-September 17)
 - Working hours change, in most companies employees work only till 3pm
 - Life moves during night (shopping malls are open till 2am)
 - No research on food can be conducted during this time
 - FGDs can happen only late at night, after respondents break their fast (usually starting at 8:30 and 10:30pm!)

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Section III: Data

Sources



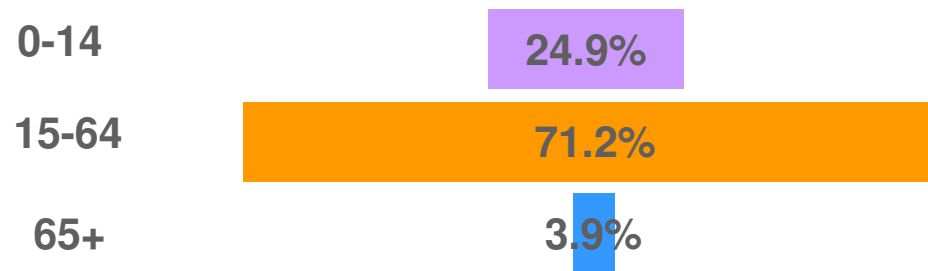
This data is assembled from a Synovate telephone survey of a representative sample of adults conducted in April 2006.

It is supplemented with some basic country facts, as well as economic population and communications data from the Central Intelligence Agency World Factbook.

UAE: Demographic overview

- Population: 2.602m (July 2006)
- Rank in world by population: #139
- Median age: 28.1
- Adult literacy rate: 77.9%
- Area total: 83,600 sq km
- Rank in world by area: #115

Population distribution by age (2006)



Communications (2005)

- Telephone - land lines: 1.237m
- Telephone - mobile: 4.54m
- TV broadcast stations: 15
- Internet users: 1.397m

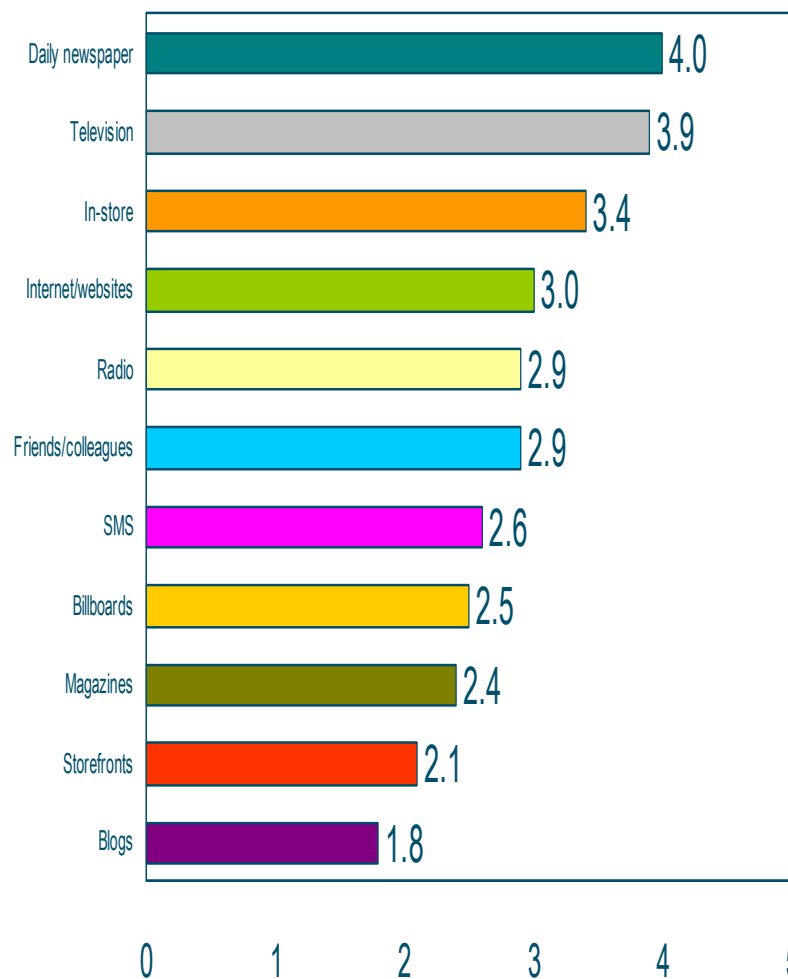
Basic UAE economic facts (2006)

- GDP (official exchange rate): \$110.6 billion (US\$)
- GDP per capita: \$42,506 (US\$)
- GDP real growth rate: 10.2%
- Exports: \$137.1 (US\$) billion
- Current account balance: \$26.89 billion (US\$)

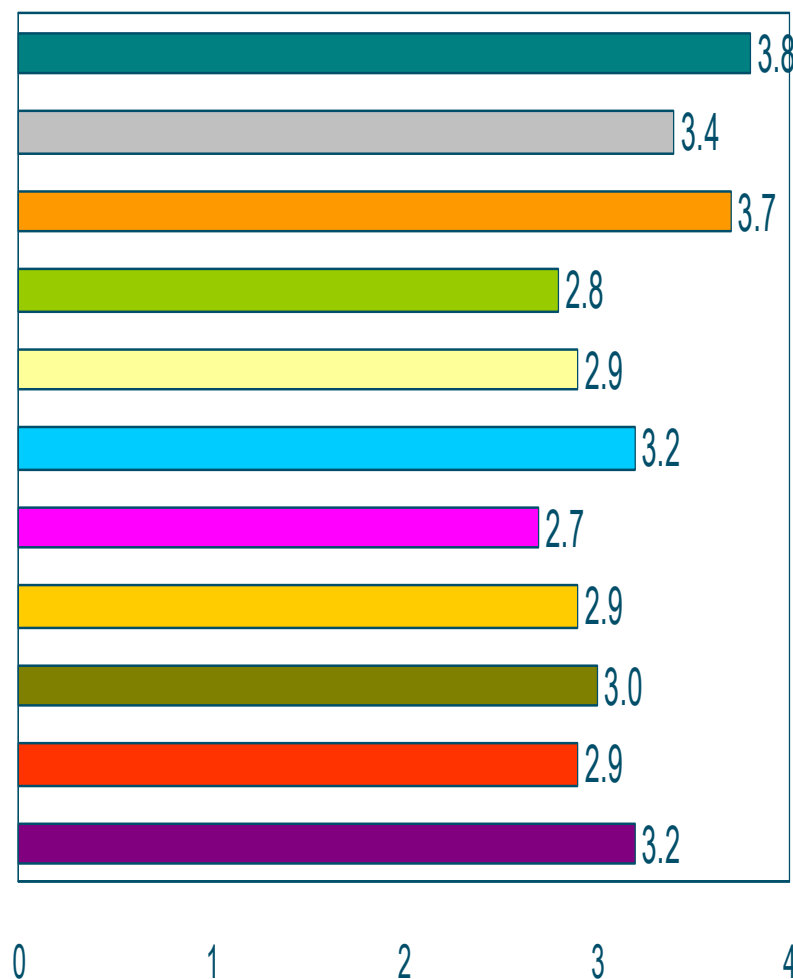


Most important media sources (5= Most important)

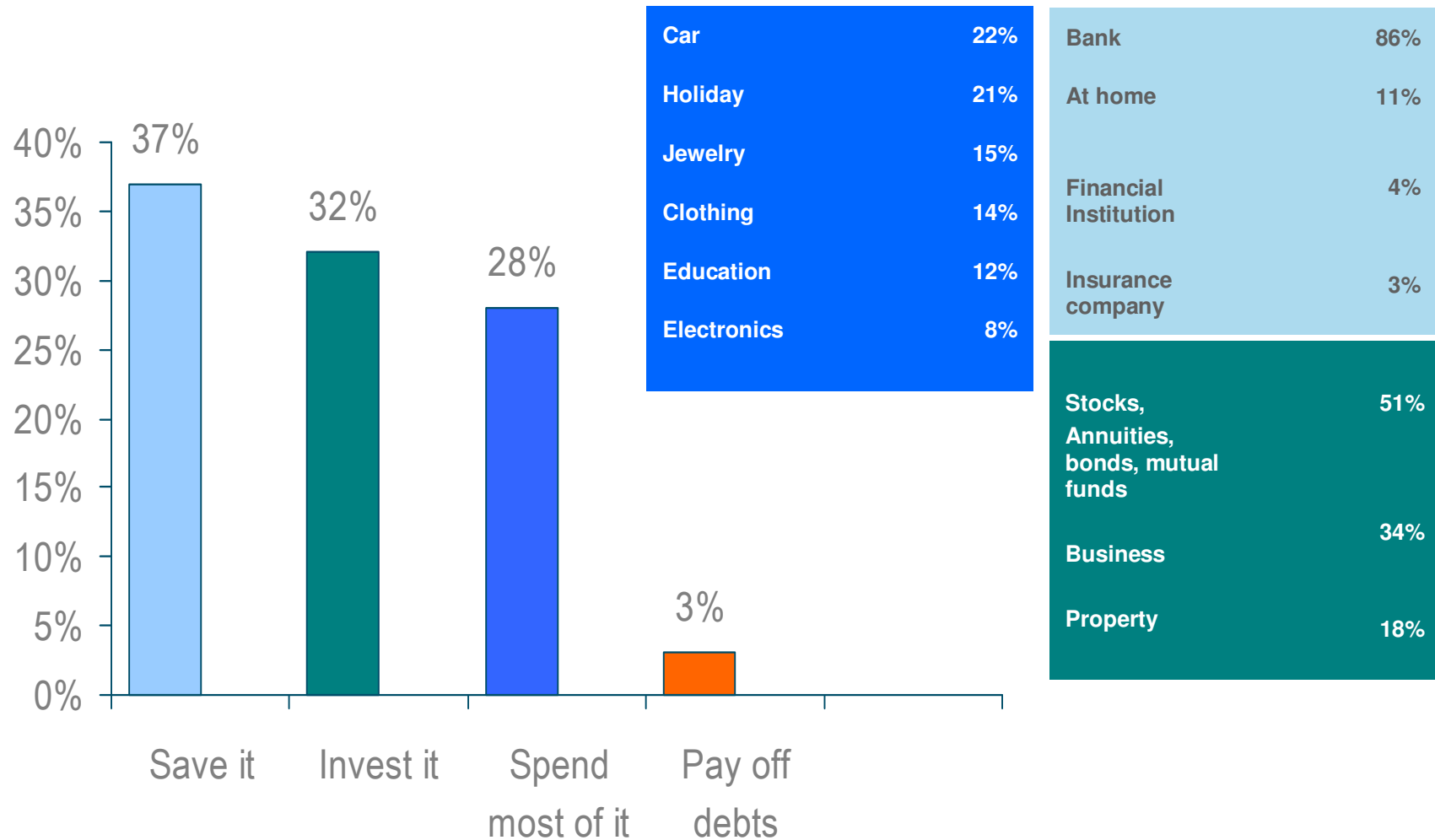
Most Important For News



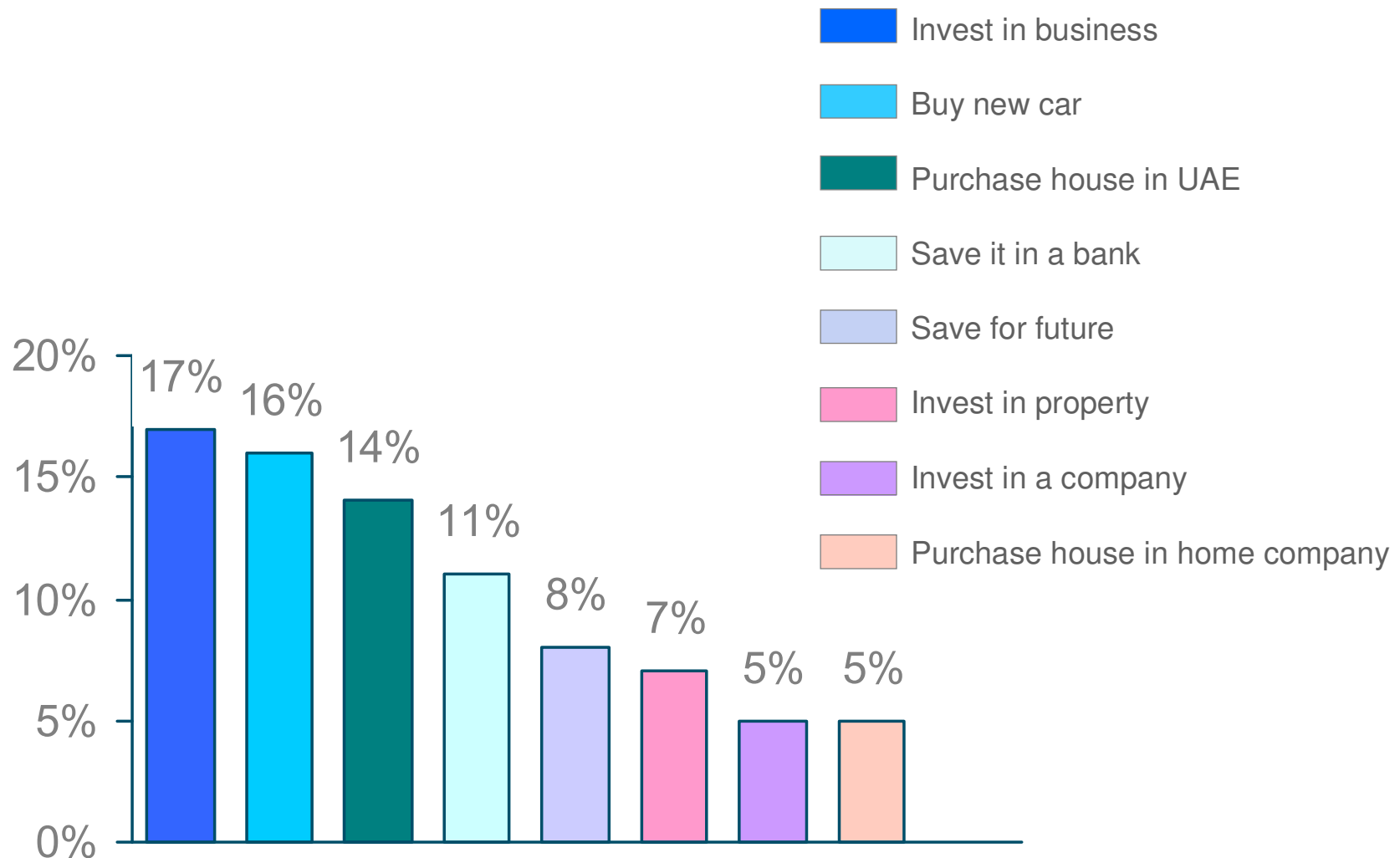
Most Important For Product Information



What would you do with 20% more household income?



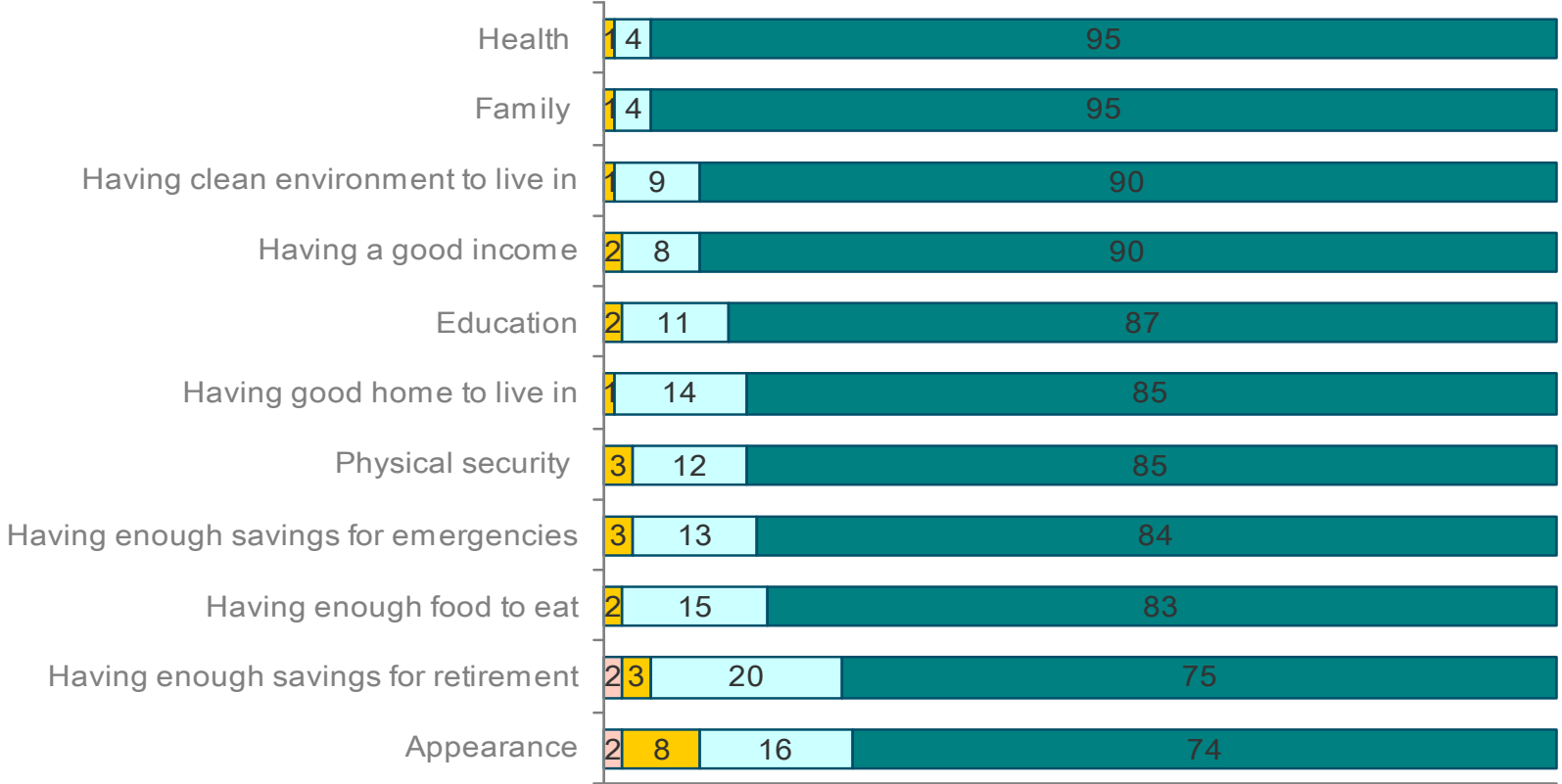
What would you do if you won 400,000 Dirham in a lottery? (approx US\$100,000)



Lifestyle personal importance

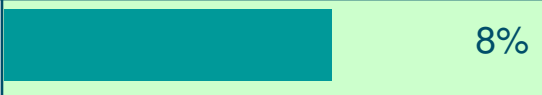
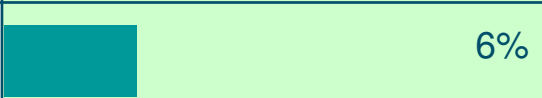
(Numbers in percent)

- Totally unimportant
- Not very important
- Neither important nor unimportant
- Quite important
- Very important







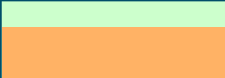
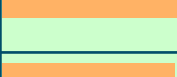



Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand
Travel		
Hotel group	 8%	Le Meridian
Airline	 6%	Emirates Ail
Alcohol		
Beer	0%	-
Whiskey/Scotch	0%	-
Brandy/Cognac	0%	-

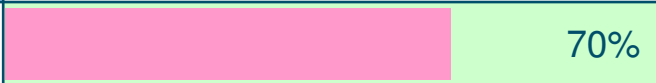
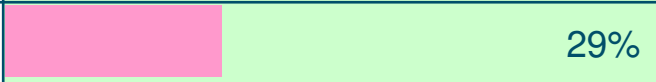
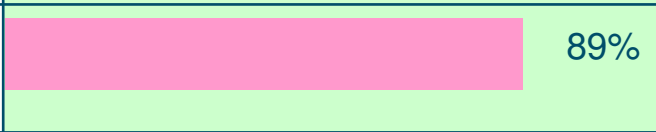

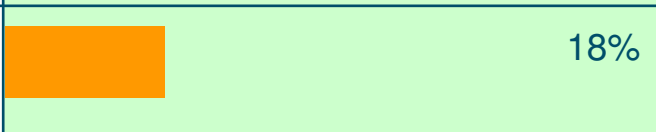


Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand
Soft Drinks		
Fruit Juice	 87%	Lacnor
Cola	 76%	Pepsi
RTD Tea	 61%	Lipton
RTD Coffee	 25%	Starbucks
Auto		
Fuel for your car/ motorcycle	 48%	Adnoc
Car/Pick-up Truck/ SUV	 33%	BMW
Motorcycle	 1%	Suzuki

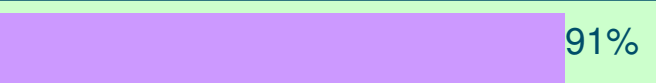
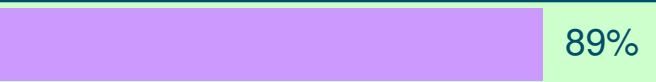
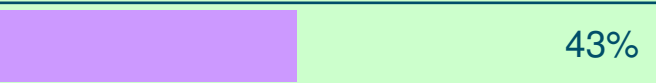
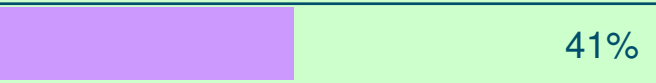
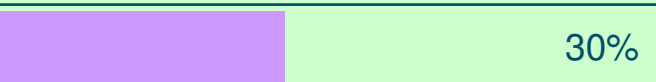
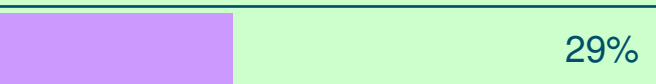
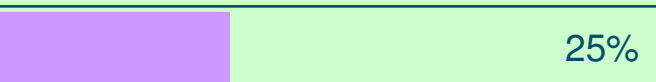
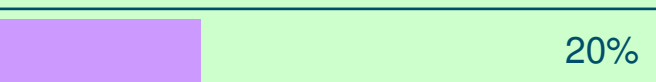


Products and services – usage during past three months and brand image

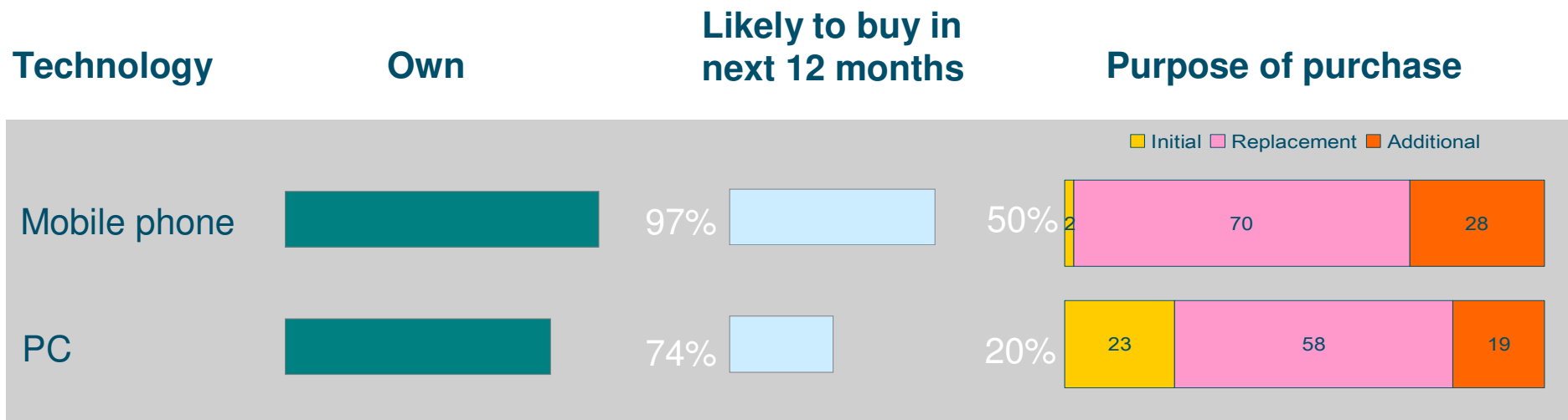
	Used past 3 months	Best Brand
Retail		
Everyday clothing store	 70%	Sana
Designer clothing store	 29%	Zara
Fast food chain	 89%	Kentucky Fried Chicken
Technology		
Mobile phones	 82%	Nokia
MP3 player	 18%	Sony



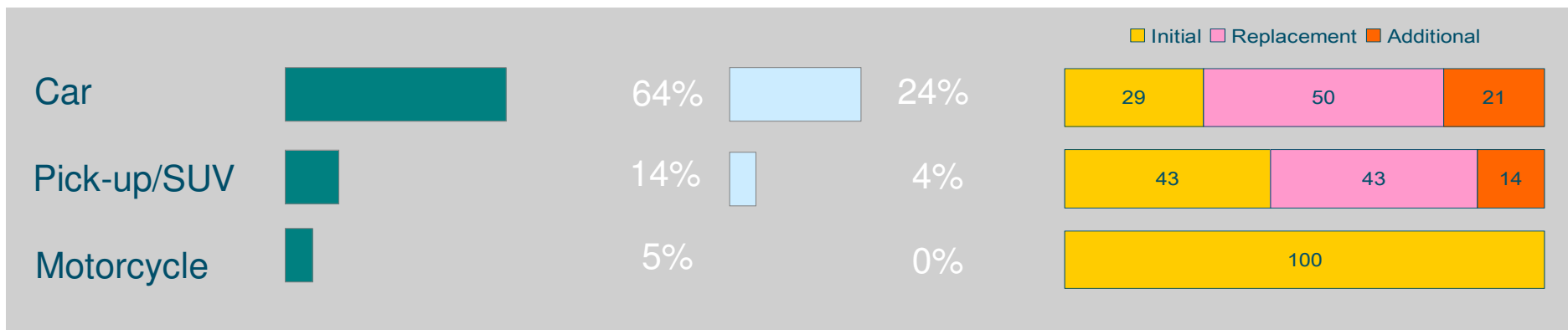
Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand
Personal Care		
Soap	 91%	Lux
Shampoo	 89%	Dove
Conditioner	 43%	Dove
Shower Gel	 41%	Lux
Facial Moisturiser	 30%	Nivea
Face make-up	 29%	Max Factor
Eye make-up	 25%	Nivea
Facial Cleansers	 20%	Nivea

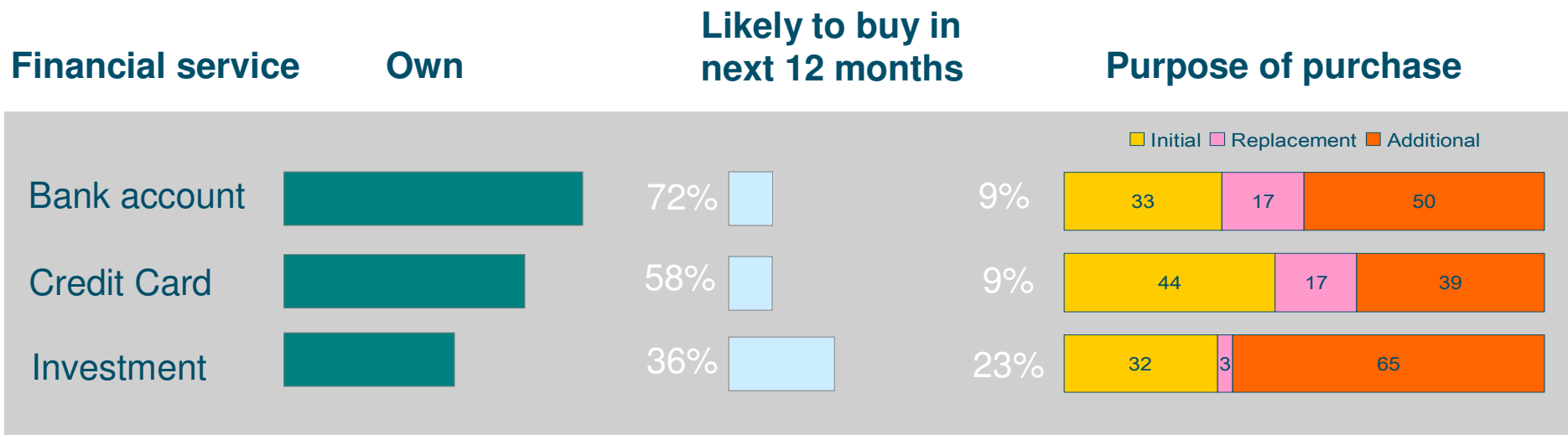
Product ownership



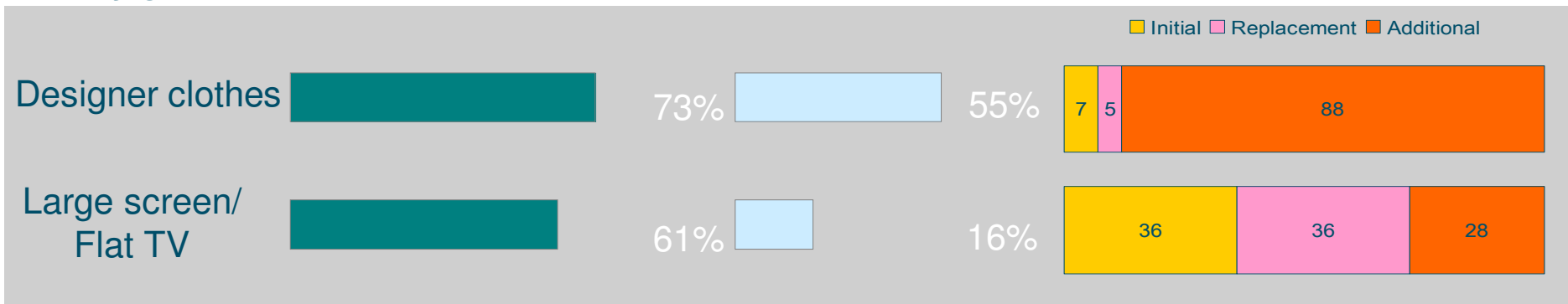
Vehicle



Product ownership



Luxury goods





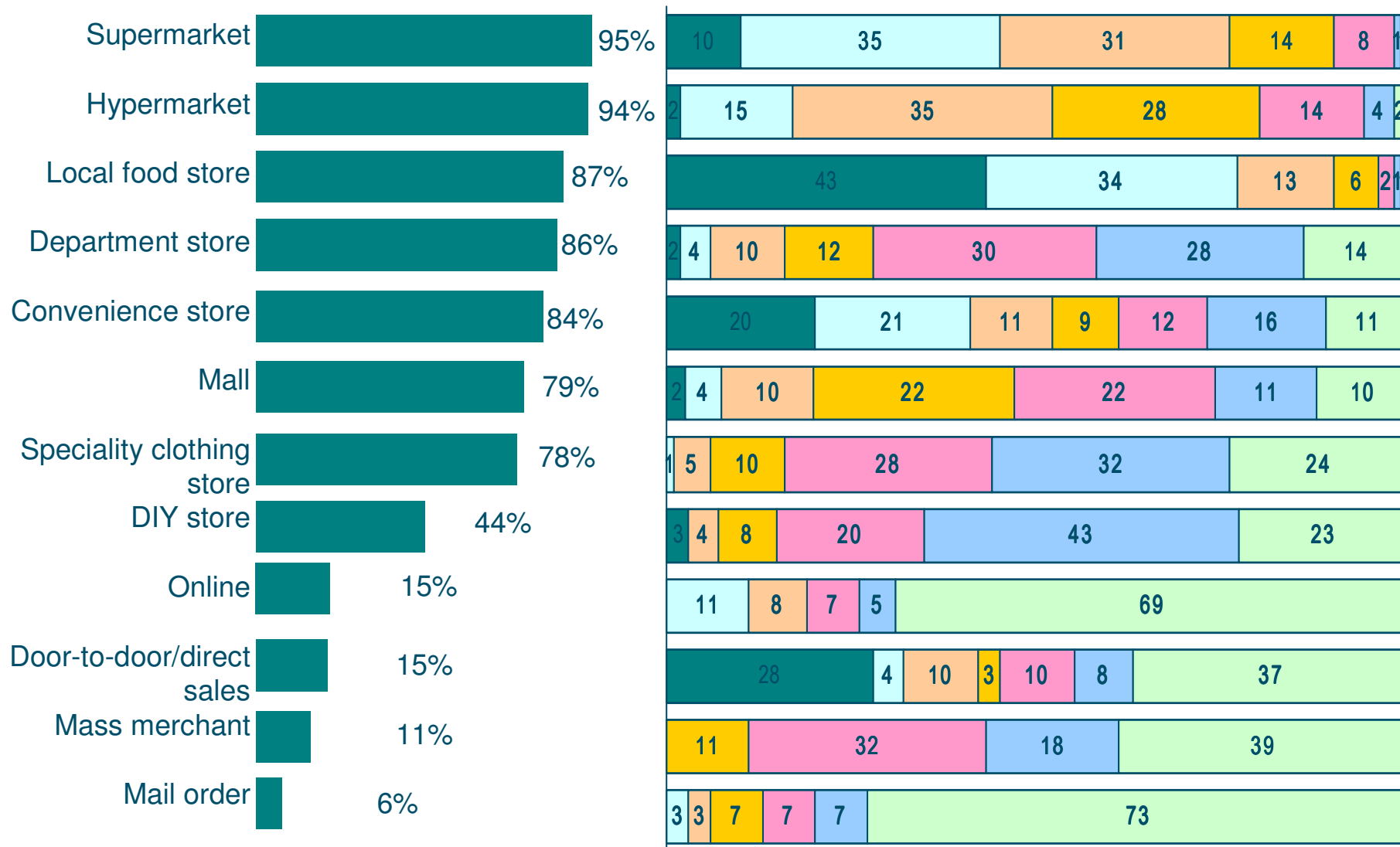
How do I spend my weekday/weekend (Hours)

	Media/Information			Sleeping
	Reading newspapers/magazines	Surfing the Internet	Watching TV	
Weekday	0.49	0.63	1.80	7.23
Weekend	0.76	4.33	4.91	7.97

	Working/school			Exercising/ Playing sports	Staying at home
	Commuting	Housework	Work/school		
Weekday	0.74	0.89	5.35	0.29	3.40
Weekend	0.02	0.85	0.00	0.39	4.19

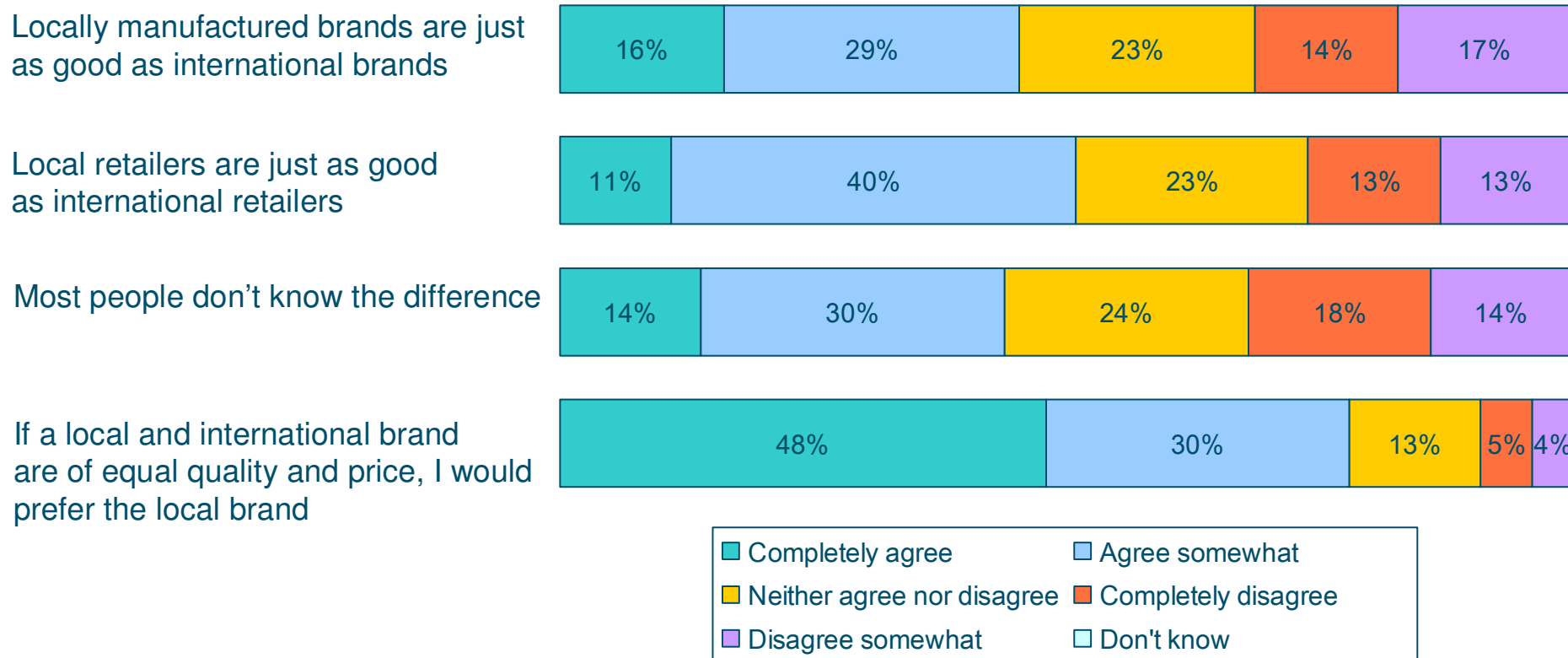


Retail penetration and frequency (Past year)



Every day Several times a week Once a week Once every 2 weeks Once a month Once every 3 months Less often

Local or international

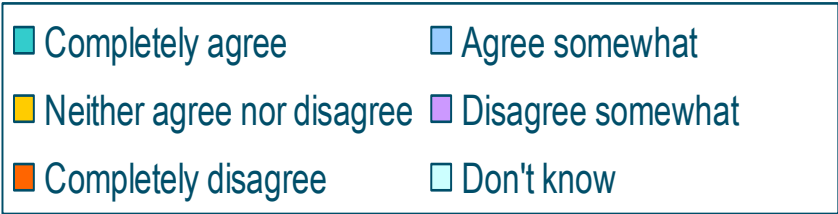


Have you experienced any of these distressing situations in the past year? (Figures in per cent)

	Total
Been sick and could not get medical attention	5
Had to accept a pay cut	3
Been sick and could not afford medical attention	3
Lost your primary job	2
Been a victim of discrimination	0
Been the victim of a crime	0
Had to skip a meal because you did not have money for food	0

Attitudes (Figures in percent)

Economy



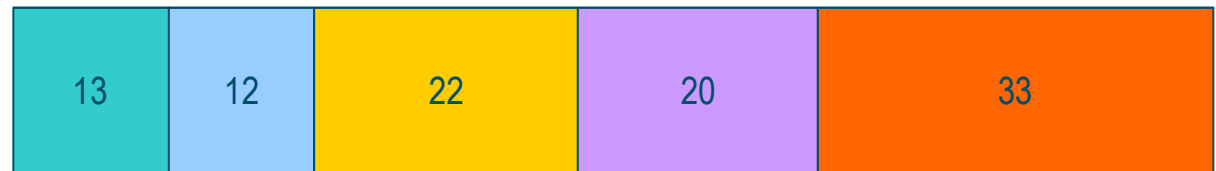
Attitudes

Environment

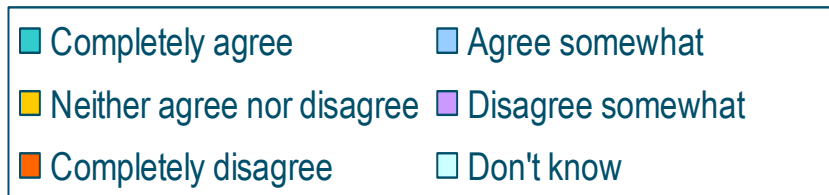
Environment degradation is a major issue in my country



The environment in my country is too polluted today



There is a good chance that my country will suffer a major natural disaster in the next 12 months



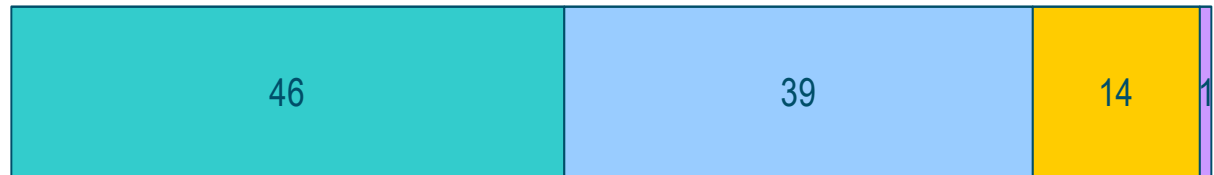
Attitudes

Personal

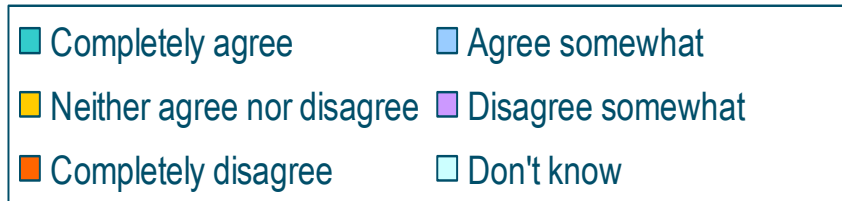
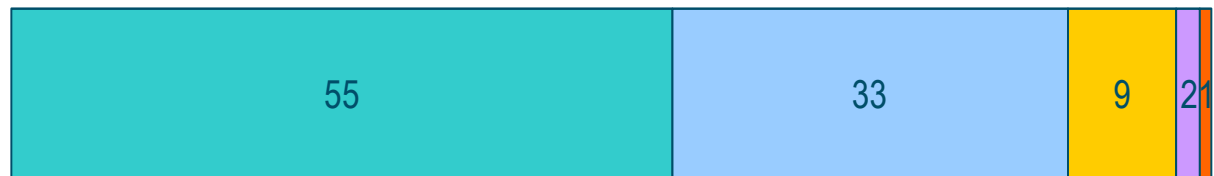
Five years ago things were better for me



In five years time things will have improved for me



Today life is good to me and my family



Attitudes

Social

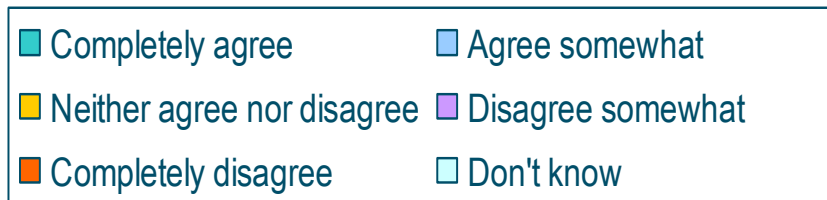
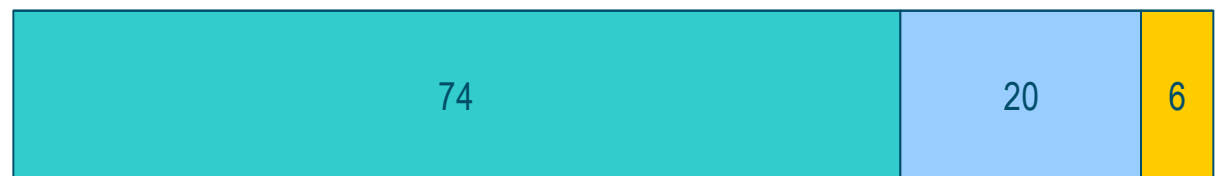
I am proud of what my country has achieved



My country has a bright future



My country is innovative



Bringing lifeto life



Thank you

