Digital Consumer Trends 2025

January 2025

CONTENTS

About the research

Digital Consumer Trends is a multi-country study of how people engage with and purchase digital products. It spans devices, connectivity, media and emerging technologies.

The KSA+UAE edition of this research comprises a representative sample of 2,000 consumers across KSA and UAE, aged 18-50, and weighted for demographics such as age, gender, region and working status.

The KSA+UAE survey took place in September 2024 and was conducted by an independent research entity. Questions cited in this document may be simplified for the sake of visualisation.

Further, the report ahead outlines a comparative study of digital behaviors in KSA+UAE markets in comparison to the survey responses in the UK market.

Key takeaways

Gen AI Usage trends

21%	Daily
34%	Weekly
19%	Monthly
10%	Less than monthly
15%	Once or twice

60% Personal

57% Education

47% Work

21% of the Gen AI (Generative Artificial Intelligence) users use Gen AI applications daily for different purposes, while 15% have used just once or twice, to experiment with the tool. The highest usage of Generative AI in KSA+UAE is for personal & educational purposes.

Data privacy is a key concern among low frequency users of Gen AI

25%

of KSA+UAE Gen AI low frequency users are worried about their data privacy.

Whereas copyright and IP infringement is a concern highlighted by

19%.

The above factors contribute to the gap between personal and work usage of Gen AI. This gap is likely to widen (as seen in the UK market) once Corporates enforce their Gen AI policies at work.

Subscription Video On Demand (SVOD)

47% stopped sharing with another household, or had another household stop sharing with them

SVOD: Reasons for Cancelling

Didn't use it enough	21%
Subscription was too expensive	20%
Rising costs in other areas	20%
Free trial / Discount ended	19%

Devices: Planned Purchases

89%

consumers in the region plan to purchase a connected device in the next 12 months. The top 3 devices being pursued are: Smart phones, Smart watch, and Laptop.

43% **29%** **28%**

(% of consumers in the region who plan to buy the above devices in next 1 year)

46% trust that tech companies are transparent in declaring their carbon footprint, and many more feel companies often overstate their **"green" image**

more than half of the consumers rely on **social media as their main news source**, significantly above mainstream news outlets including TV news / websites/ apps

73% made a **purchase through social me**dia in the past 12 months, with one in five being via influencer post or affiliate link on social media


GENERATIVE AI

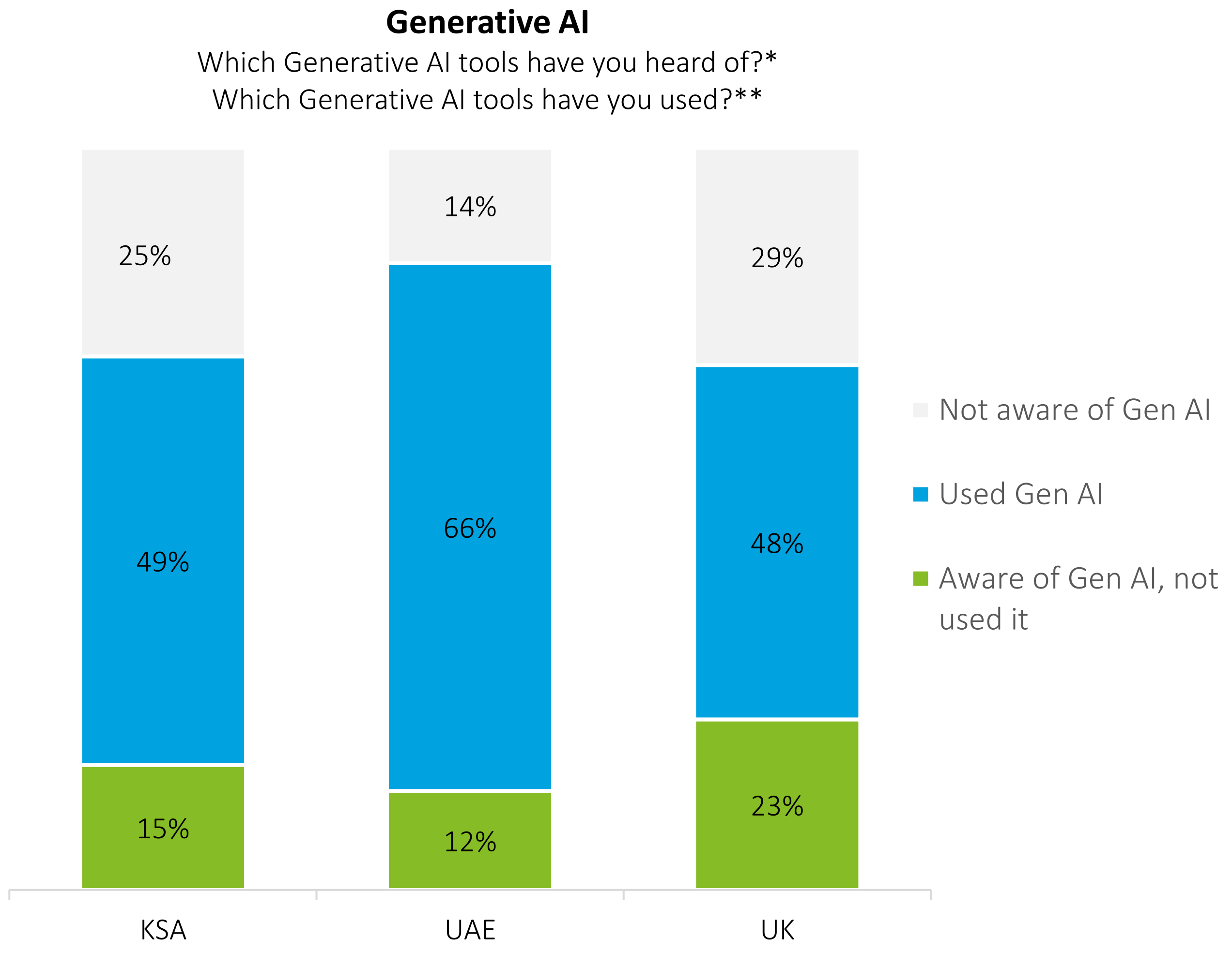
Adoption and awareness of generative AI is high, particularly amongst UAE respondents; however, 20% have still not heard of it

In the KSA+UAE countries, around 58% of respondents have used Gen AI applications such as ChatGPT, Google Gemini and others. Awareness is particularly high in UAE and markedly higher than in European markets including the UK.

Around 14% of consumers claimed to have heard of Generative AI but never used it.

Citizens in KSA and UAE are clearly showing enthusiasm to the new technology, which will generate the **future demand for AI related tools** and applications. Business leaders must continue fostering this positive outlook while addressing the challenges and concerns associated with the adoption of Gen AI.

In the UK, 48% of consumers claimed to have used Generative AI, while 29% are not aware of the tool.

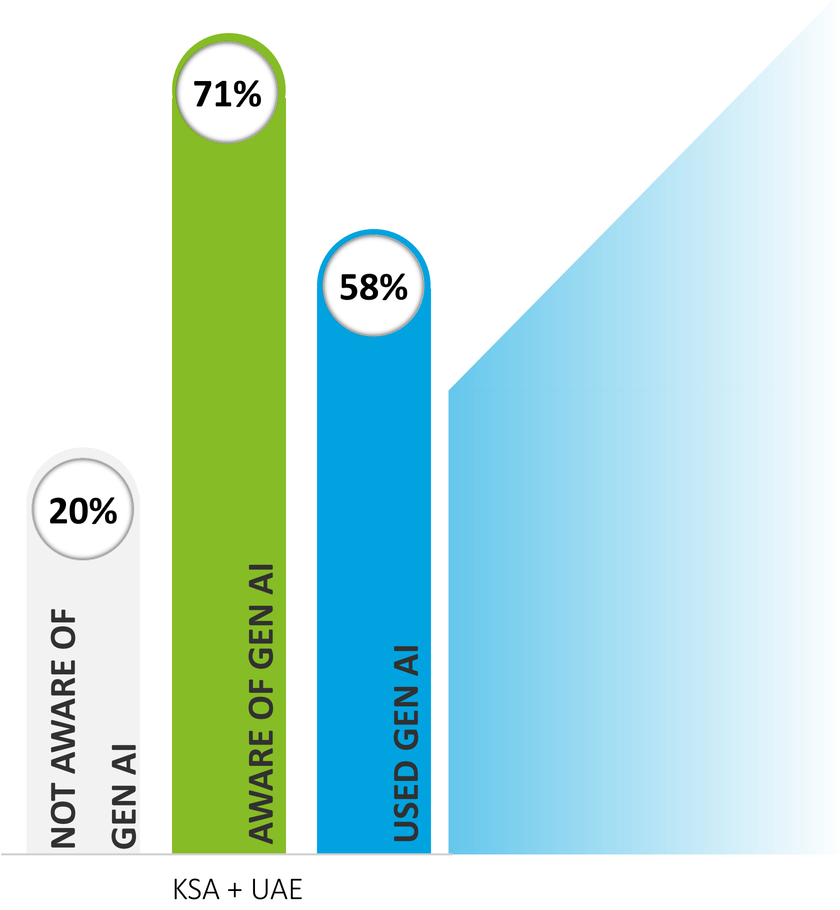


Weighted base: All respondents aged 18-50 years, KSA (1,000), UAE (1,000), UK (2311)
*Respondents given a range of Gen AI tools to choose from; including "Another"; **Those who were aware of generative AI, but did not know if they had used it were aggregated into "Aware of Gen AI, not used it".
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

71% respondents are aware of Gen AI, and one in five have used Gen AI daily for different purposes

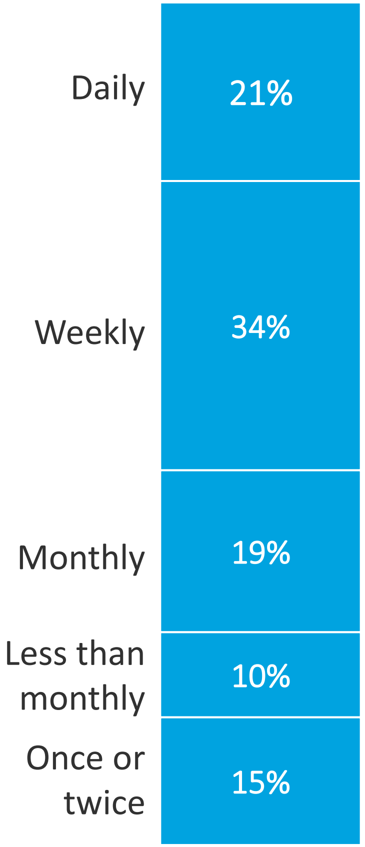
Generative AI

Which Generative AI tools have you heard of?*
Which Generative AI tools have you used?**



Users: Frequency of Use

Which best describes your use?
[Of those who have used Gen AI]



In KSA and UAE, more than half (55%) of generative AI users use it once a week or daily.

35% of the Gen AI users, in the UAE, use it once a week, while in KSA, the weekly users are 32%.

Frequency in the UAE and KSA is significantly higher than in the UK, where daily frequency of use of Gen AI is 12%, and 28% weekly.

A quarter (25%) of KSA+UAE Gen AI users are extremely infrequent users, at less often than once per month.

Weighted base: All respondents aged 18-50 years, 2024 (2,000), who have used generative AI (1,152)
*Respondents given a range of Gen AI tools to choose from; including "Another"; **Those who were aware of generative AI, but did not know if they had used it were aggregated into "Aware of Gen AI, not used it".
Not shown here is Don't know
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Data privacy in KSA+UAE is the primary concern among low frequency users of Gen AI, much more than the perceived value-add of the tool

25%

of KSA and UAE Gen AI low frequency users are worried about their data privacy. In the same vein, copyright and IP infringement is a key concern (19%) of KSA+UAE respondents. Regulatory safeguards in the region will be key to adoption.

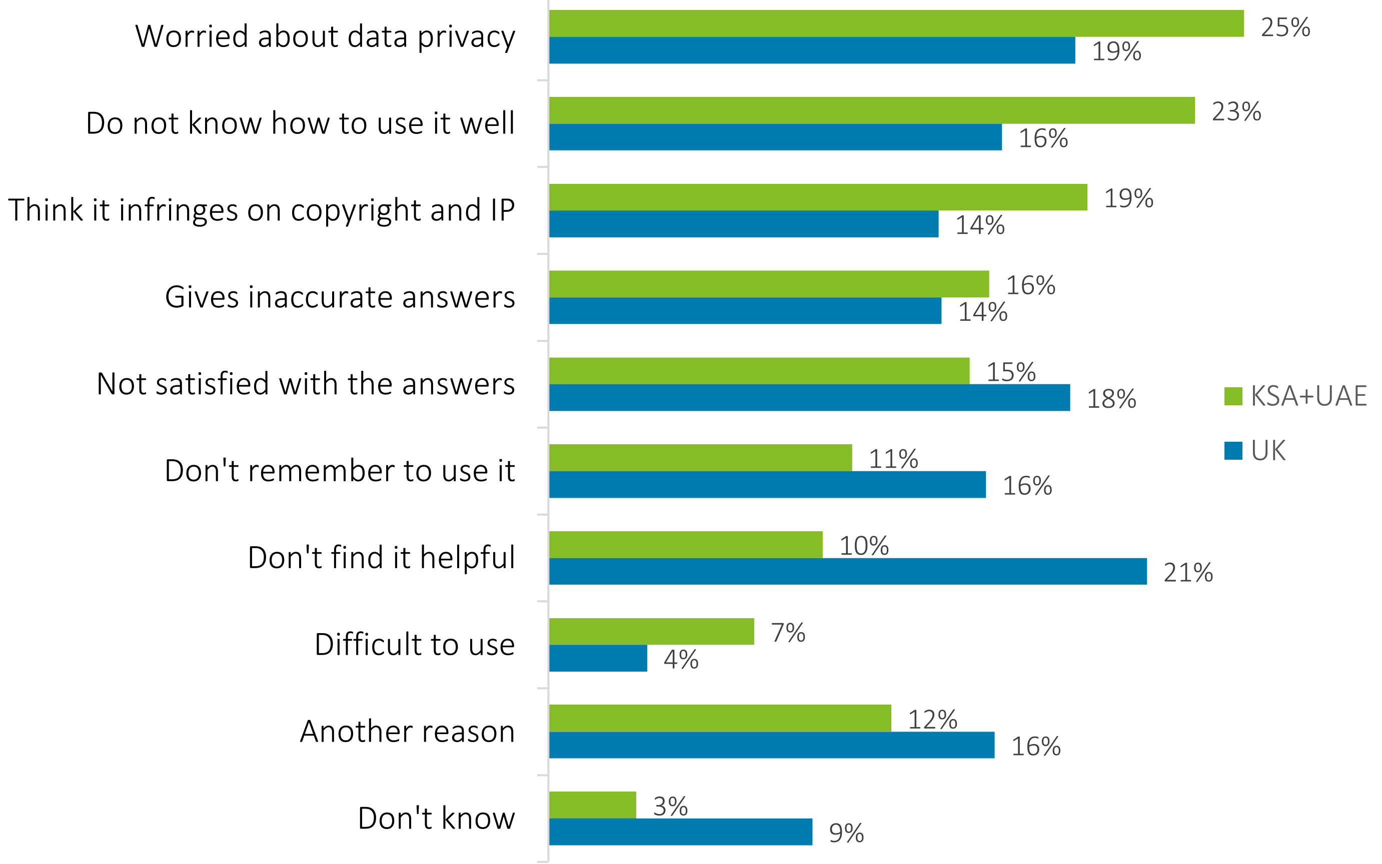
In contrast, a relatively low proportion of the population compared to other markets experience dissatisfaction with the value-add generated by the tool. Only 10% of respondents in KSA+UAE do not find the tool helpful compared to 21% in the UK.

Key sources of concerns among low frequency users in the UK are linked to the value of the tool itself with 21% not finding it useful and 18% not being satisfied with the answers.

Low Frequency Users

Why don't you use Gen AI more frequently?

[Of those who use Gen AI less than monthly]

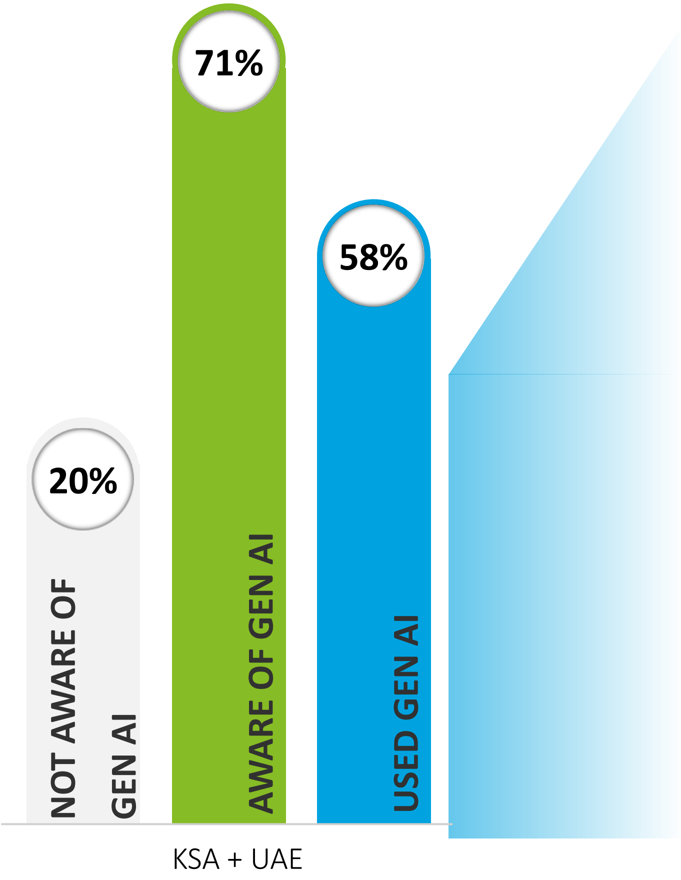


Weighted base: All respondents aged 18-50 years who have used generative AI (1,152), less frequently than monthly, KSA+UAE (288) UK (407)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

The pattern of usage of Generative AI in KSA+UAE is balanced compared to other regions – Personal is on top but closely followed by Education

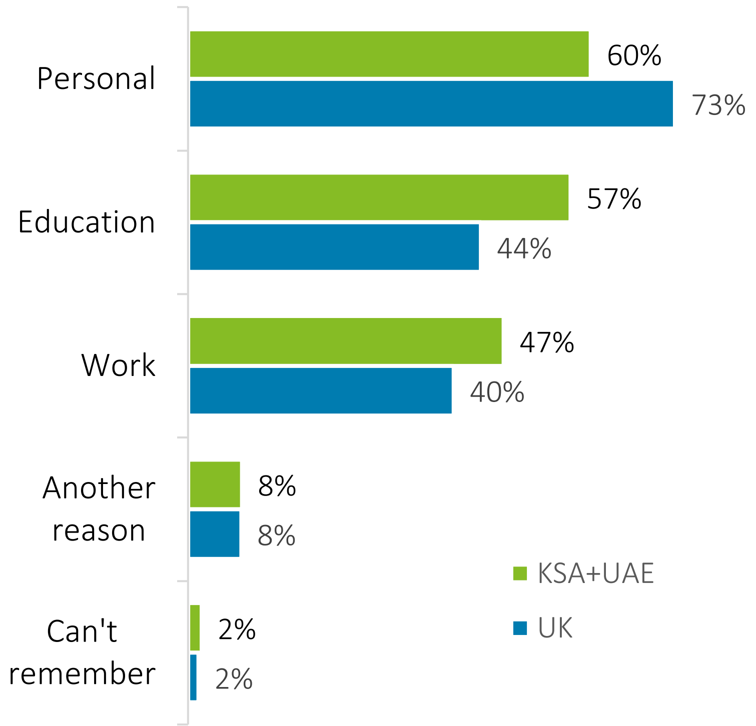
Generative AI

Which Generative AI tools have you heard of?*
Which Generative AI tools have you used?**



Users: Purpose of Use

Which of the following purposes have you used any Generative AI for?
[Of those who have used Gen AI]



Out of the people using Gen AI, 47% have used it for work purpose, compared to 60% for Personal and 57% for Educational purposes. As in other markets, the gap between personal and work usage comes down to various factors including concerns from companies around data safety and IP infringement.

In contrast in the UK, the gap between personal and non personal (education and work) is much wider with 73% using Gen AI for personal reason and only 40% at work (44% in Education). Most likely Corporate GenAI policies have started to be enforced earlier in the European markets.

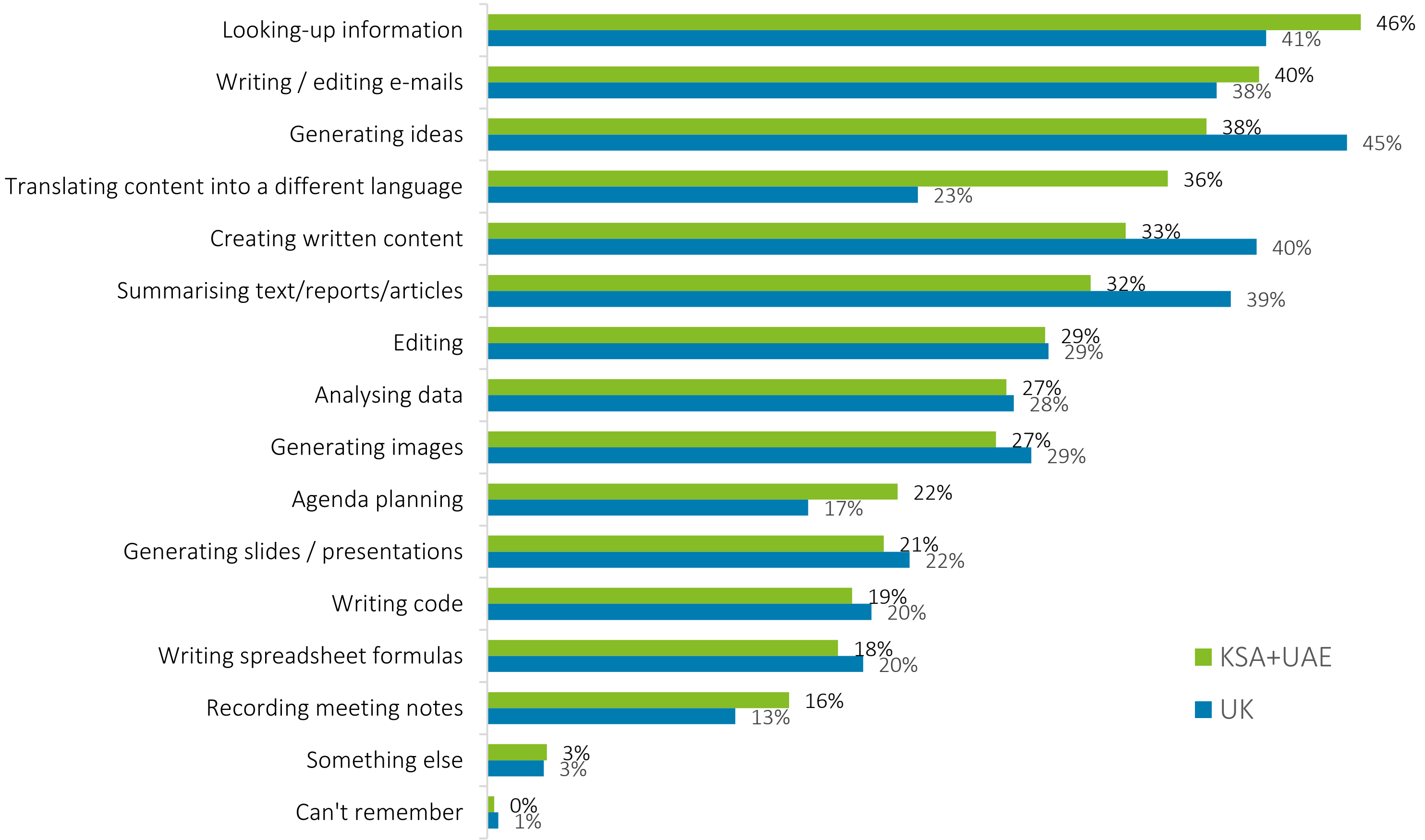
Weighted base: All respondents aged 18-50 years, 2024 (2,000), who have used generative AI, KSA+UAE (1,152), UK (1103)
*Respondents given a range of Gen AI tools to choose from; including "Another"; **Those who were aware of generative AI, but did not know if they had used it were aggregated into "Aware of Gen AI, not used it".
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

The most common applications of Gen AI at work in KSA+UAE are task oriented – i.e., searching, editing, translating whereas we are seeing increased usage in other markets around content creation

Using Gen AI for Work: Work Tasks

Which of the following work tasks have you used any Generative AI tools for?

[Of those who have used Gen AI at work]



The leading Gen AI work applications in KSA+UAE are tasks oriented i.e., specific in nature and replacing previous tools (e.g., search engines) – these include looking-up information (46%), editing emails (40%) and translating (36%).

Translating in the UAE is particularly high considering the diverse nature of the workforce across multiple nationalities and culture.

By contrast, in other western markets such as the UK, we are seeing increased usage of "creative" use of AI such as generating ideas (45% in UK vs. 38% in KSA+UAE) and creating written content (40% in the UK).

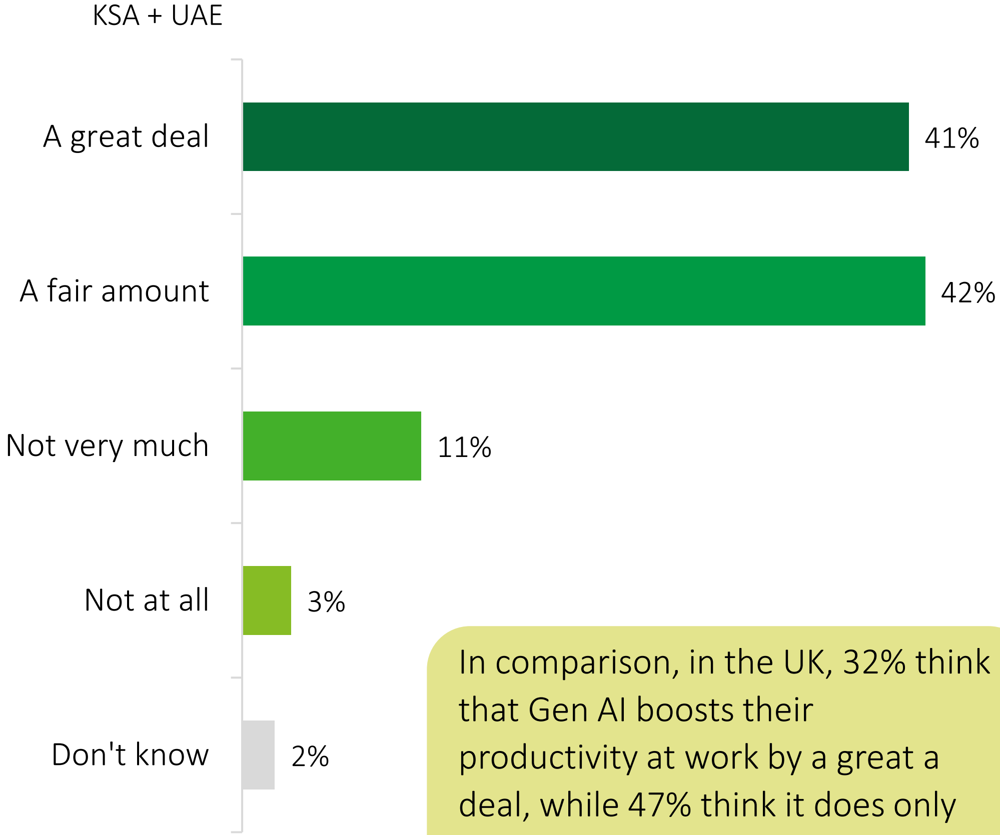
Weighted base: All respondents aged 18-50 years who have used generative AI for work, 2024, KSA+UAE (544), UK (481)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Employees using Gen AI at work in KSA+UAE are overall positive on the impact on their productivity but a bit more balanced on the encouragement from their employers on the use of the tool

Using Gen AI for Work: Productivity Boost

To what extent do you think Gen AI boosts your productivity at work?

[Of those who have used Gen AI at work]

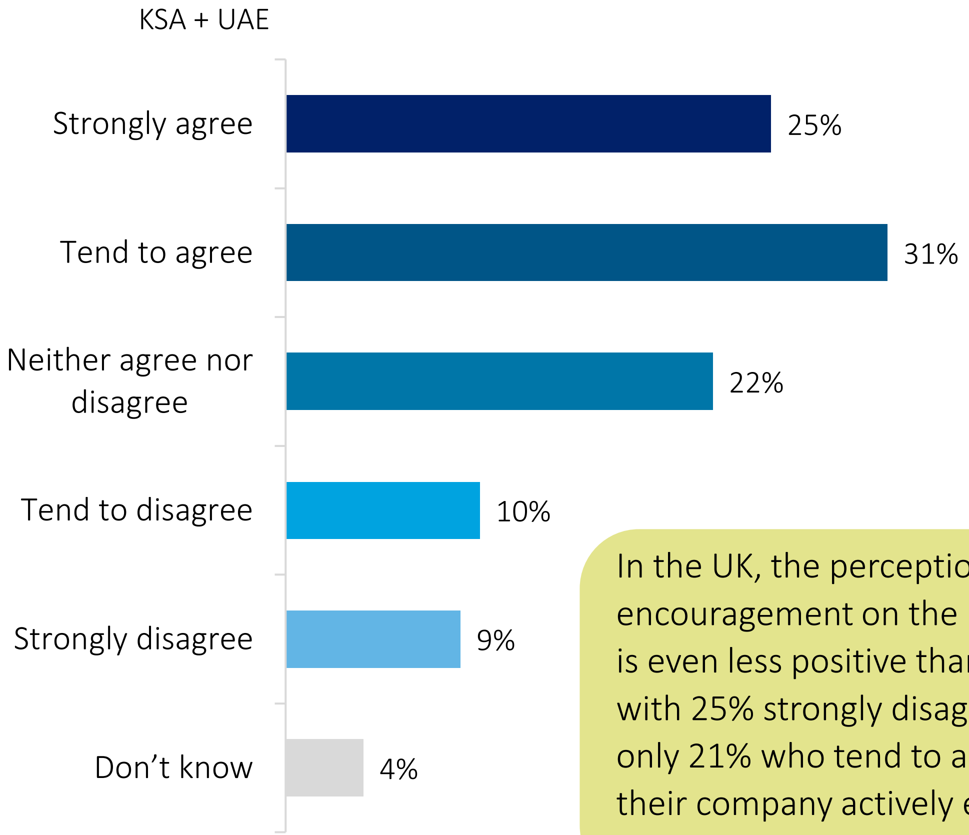


In comparison, in the UK, 32% think that Gen AI boosts their productivity at work by a great a deal, while 47% think it does only by a fair amount.

Aware of Gen AI: Company Encouragement

Agree or disagree: “My company actively encourages the use of Gen AI at work”

[Of those who have heard of Gen AI, in employment]



In the UK, the perception of company encouragement on the use of Gen AI is even less positive than in KSA+UAE with 25% strongly disagreeing and only 21% who tend to agree that their company actively encourages the use of Gen AI at work.

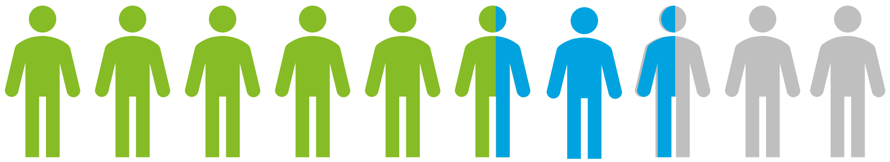
Weighted base: All respondents aged 18-50 years who have used generative AI for work, 2024 (544), employed adults who are aware of generative AI (1,006)

Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Most respondents do not completely trust AI generated mails and chatbots

Consumers are doubtful about the misleading content and misinformation from Gen AI tools. Chatbots employed by companies in customer service are perceived to generate misleading information. Companies deploying Gen AI and integrating it into various business functions must actively address concerns and provide a more personalized and efficient user experience. This will help foster the trust between businesses and their customers, which is currently lacking.

*"I would be **less inclined to trust an email** if I knew it was created using Generative AI."*



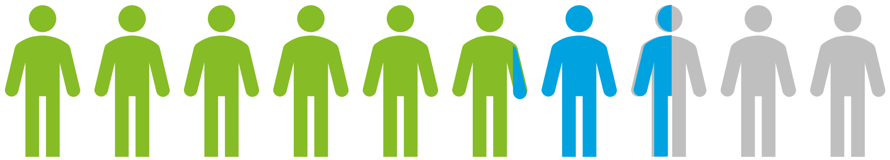
KSA + UAE

54% agree

18% disagree

25% neither agree or disagree or don't know

*"I would be **less inclined to use customer services** if I knew I was conversing with a Generative AI assistant."*



KSA + UAE

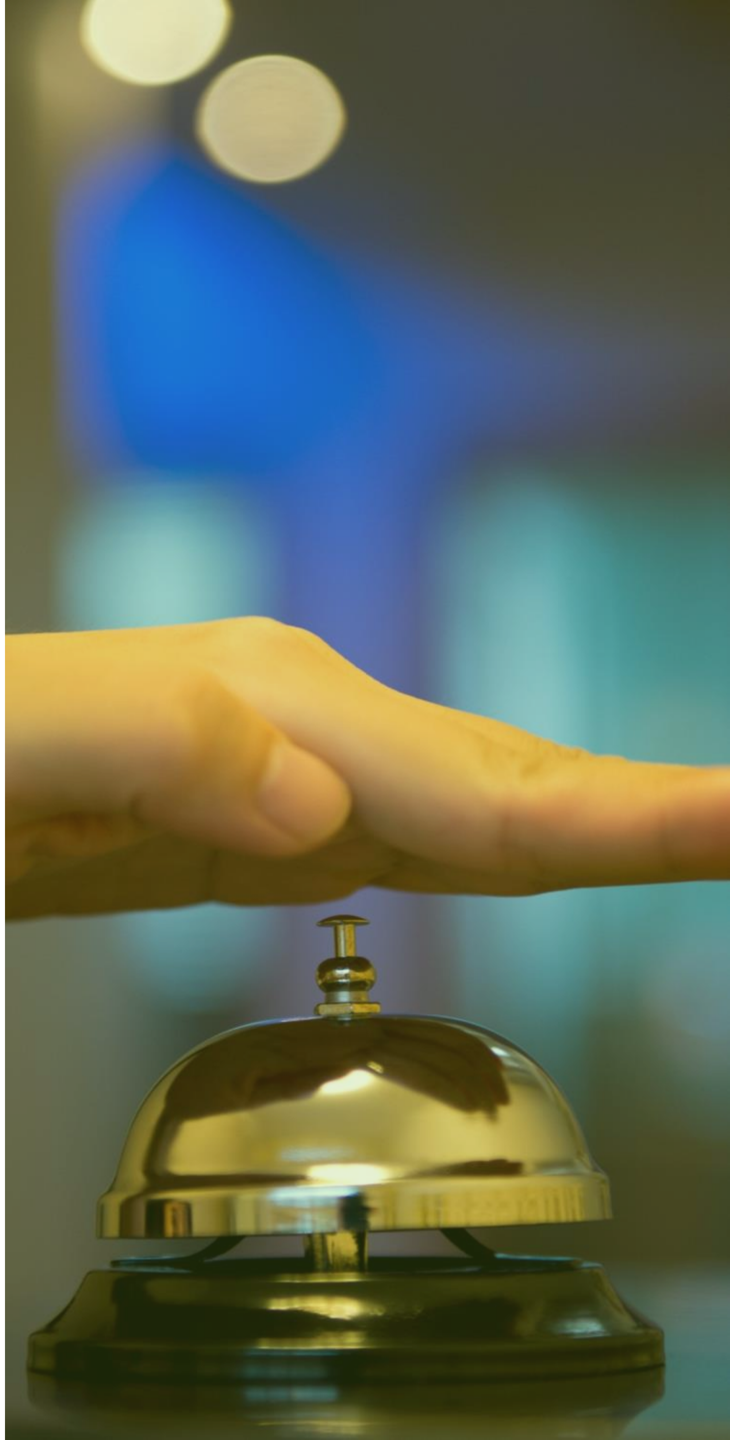
58% agree

16% disagree

23% neither agree or disagree or don't know

The UK respondents show a similar pattern - 55% agreed that they would be less inclined to trust an email if it was created using Generative AI; whereas 54% agreed that they would be less inclined to use customer services if conversing with a Generative AI assistant.

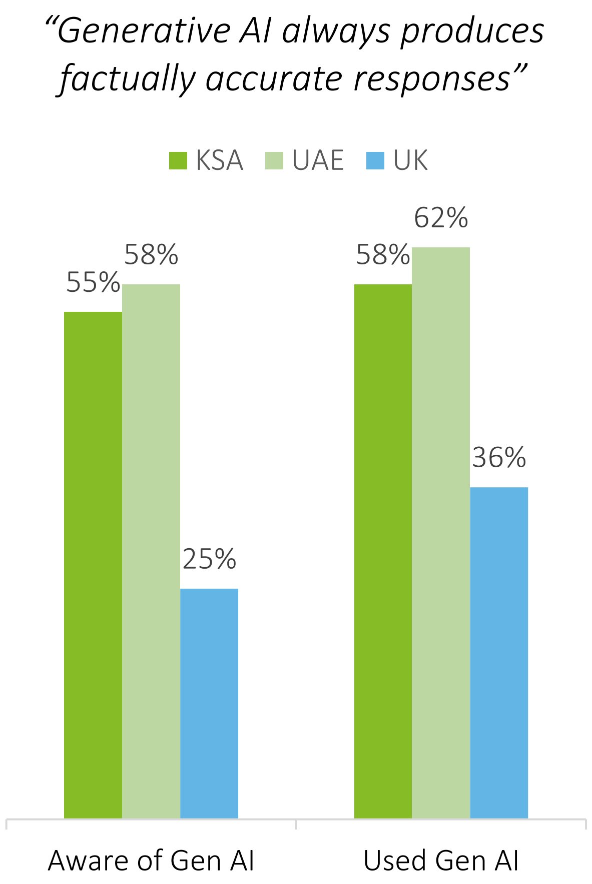
Weighted base: All respondents aged 18-50 years, who are aware of generative AI tool, 2024 (1,429)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

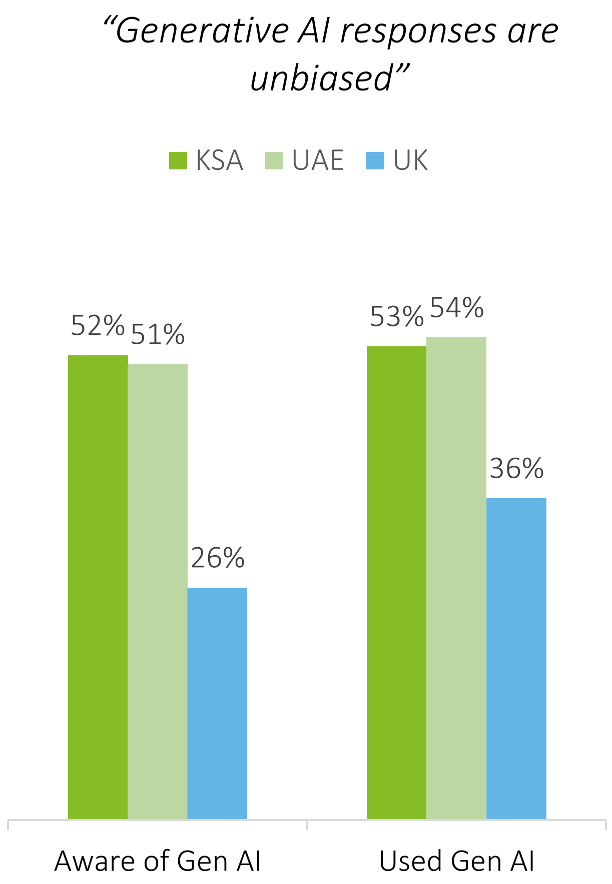


Consumers' overall sentiment towards Gen AI is positive, nonetheless they should be aware of that it can hallucinate and produce inaccurate answers

Both in KSA and UAE, from the respondents who are aware of Gen AI or have used Gen AI – more than 50% tend to believe that AI produces accurate responses and are unbiased. This is significantly higher than the UK market wherein less users agree that Gen AI always produces accurate / unbiased responses.

*Those who **agree** that…*





Weighted base: All respondents aged 18-50 years, who are aware of any Generative AI tool KSA (641), UAE (788); who have used any Generative AI tool KSA (488), UAE (664)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

DEVICES

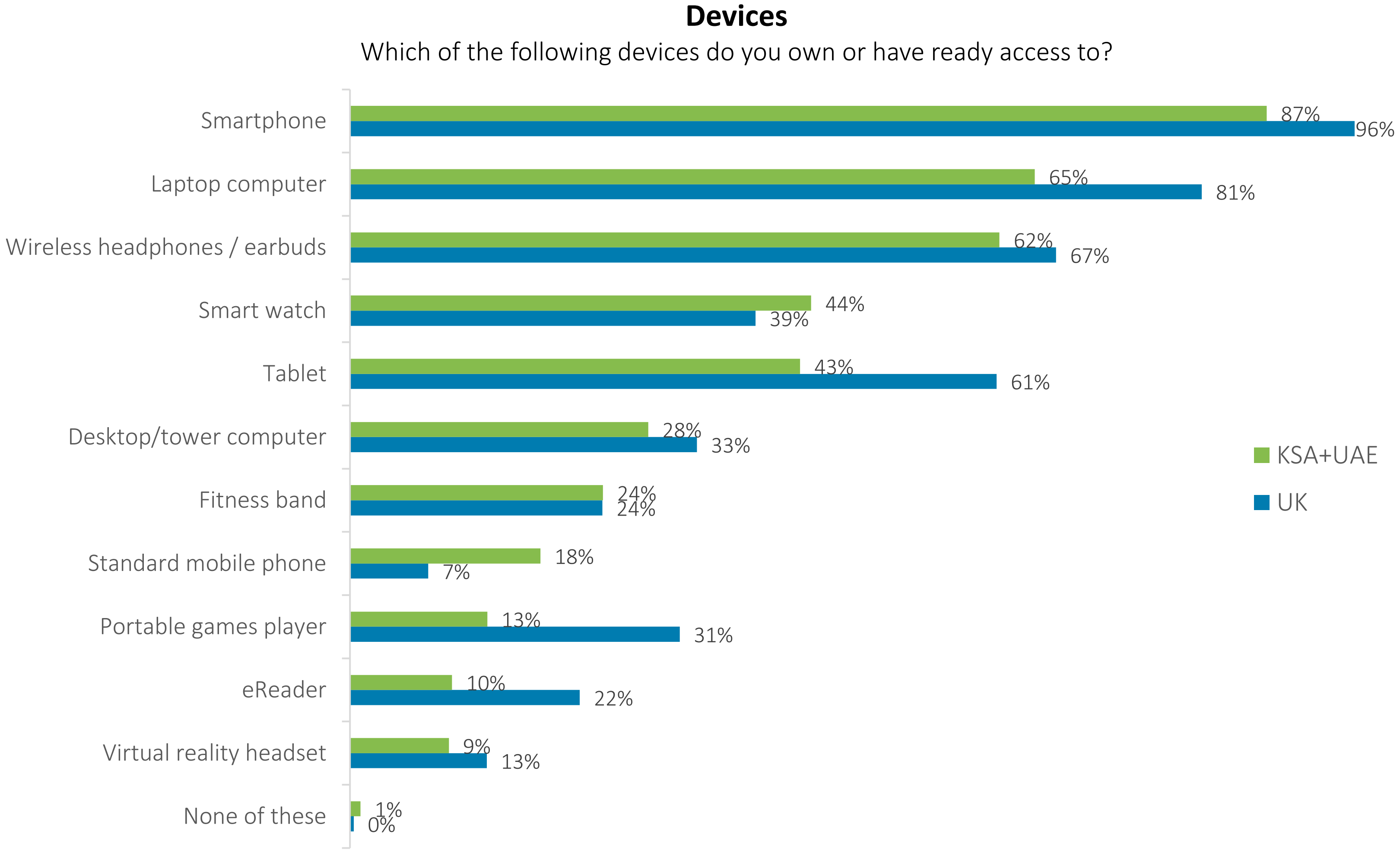
As expected, Smartphones show a ~90% adoption rate – overall adoption of devices in KSA+UAE falls short of the UK, except for smart watches

There is an overall high adoption in the KSA+UAE of smartphone (87%), Laptop (65%) and Wireless headphones (62%).

However, for Laptops and Tablets, adoption fall short of Western markets and the UK in particular.

On the flip side, for smart watches, adoption rate in KSA+UAE (44%) is higher than that in UK (39%).

The adoption rates confirm the currently low uptake of Virtual Reality headsets in the region.



Weighted base: All respondents aged 18-50 years, 2024, KSA+UAE (2,000), UK (2311)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

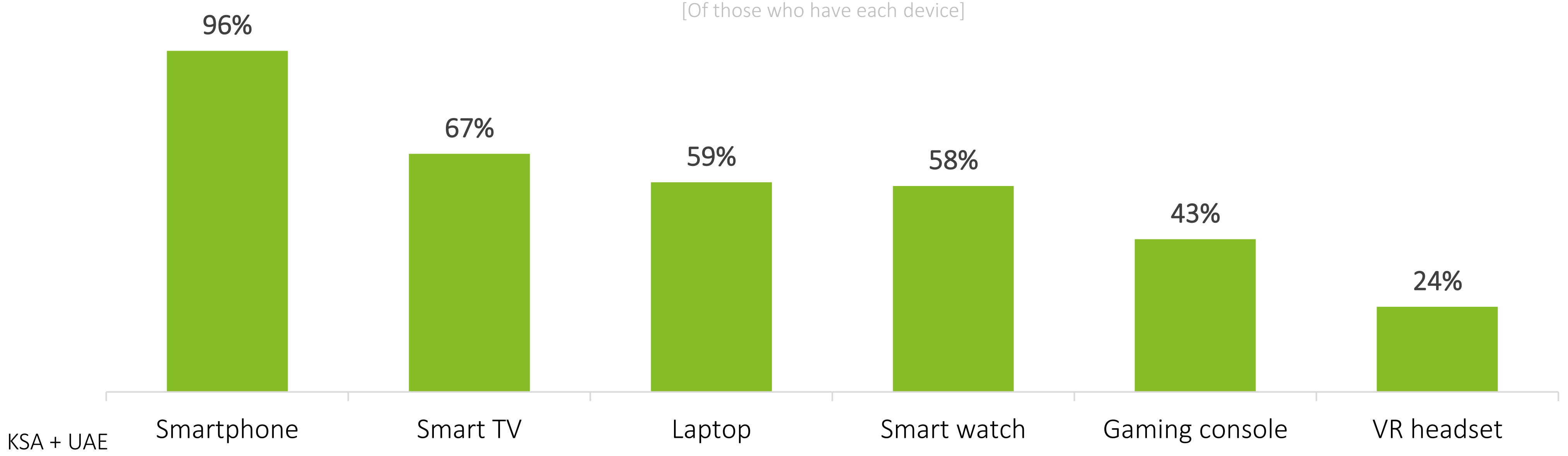
Smartphone has the highest daily usage rate, followed by Smart TV

Claimed daily usage of devices confirms the dominance of smartphones as the primary access device with 96% of daily usage. VR (Virtual Reality) continues to remain niche with 24% usage for VR headsets. Comparison with the UK shows a lower frequency of usage in the region of Smart TV but a much higher usage of gaming console, in line with the avid gaming consumption of the KSA market.

Devices: Daily Usage

When was the last time you used this device? [In the last day]

[Of those who have each device]

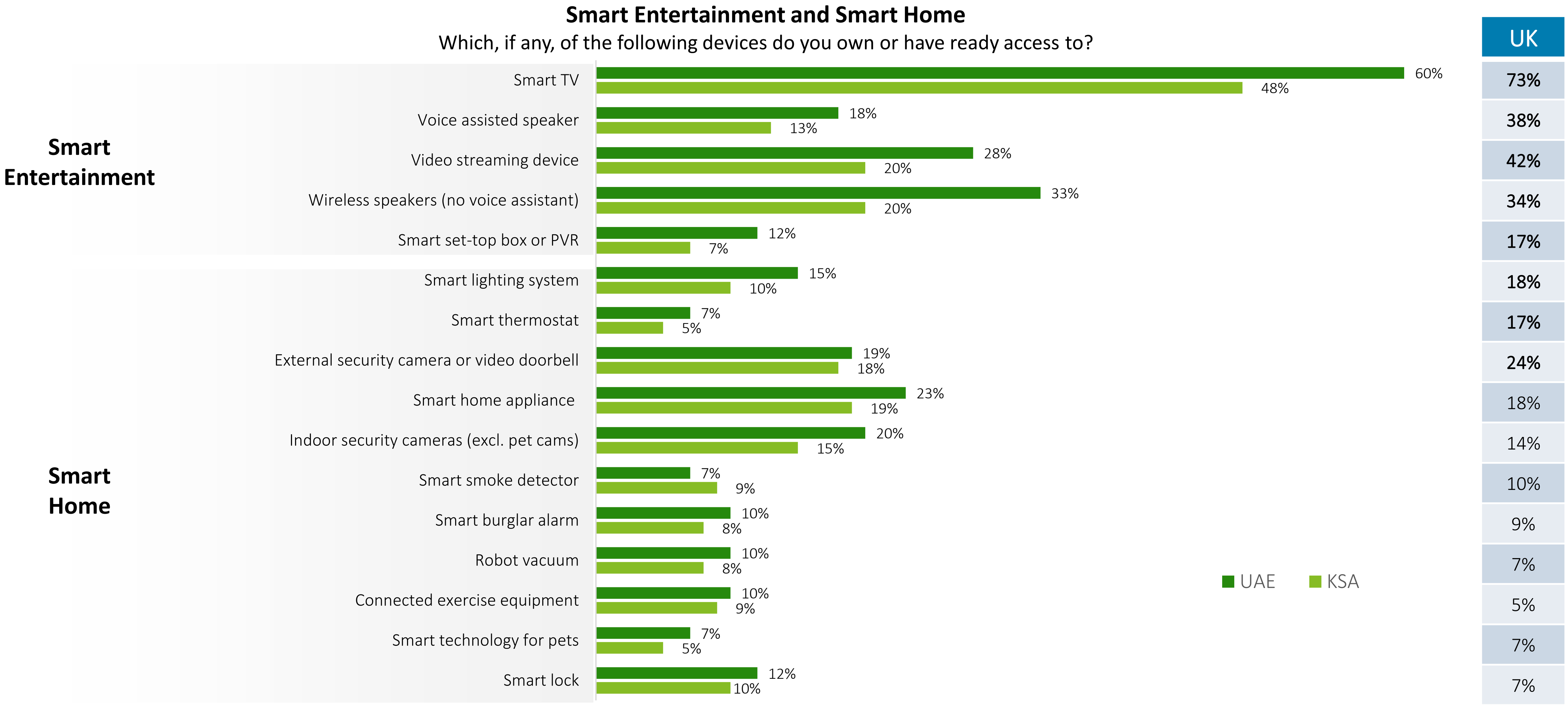


Ownership Rate: 87% | 54% | 65% | 44% | 29% | 9%

In the UK, daily usage for the devices is as follows: Smartphone 96%, Smart TV 80%, Laptop 61%, Smart watch 68%, Gaming console 23%, VR headset 19%.

Weighted base: All respondents aged 18-50 years, 2024, with a smartphone (1,743), smart TV (1,077), laptop (1,302), smart watch (877), games console (581), VR headset (188)
Ownership Rate Weighted base: All respondents aged 18-50 years, 2024 (2,000)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Smart Home adoption in KSA+UAE is still emerging, while Smart Entertainment devices are more popular but still shows a significant gap in adoption compared to Western Markets



Weighted base: All respondents aged 18-50 years, 2024, KSA (1,000), UAE (1,000), UK (2311)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Around 90% of consumers plan to make a connected device purchase in the next year

Devices: Planned Purchases

Which, if any, of the following devices do you intend to purchase in the next 12 months?

KSA+UAE consumers plan to purchase…

43% Smartphone	**19%** Tablet	**28%** Laptop	**12%** Desktop
29% Smart watch	**15%** Fitness band	**25%** Smart TV	**24%** Wireless headphones
12% Portable games player	**17%** Games console	**13%** VR headset	**13%** Voice-assisted speaker

89%

of consumers in KSA+UAE plan to purchase a connected device in the next 12 months

Consumers are looking forward to buy a new device or upgrade their existing ones impacted by various factors such as accessibility and ease. This confirms the pattern of KSA+UAE consumers to renew more frequently their digital devices, compared to international peers.

In the UK, 23% of consumers do not plan to purchase a device in the next 12 months. Whereas consumers planning to purchase devices comprise of Smartphone 32%, Smart TV 21%, Laptop 19%, Games Console 19%, Smart Watch 17%, Wireless headphones/earbuds 15%, Tablet 14%, Fitness band 13%, Voice-assisted speakers 9%, Wireless speakers / wireless soundbar that does not have a voice assistant 9%, VR headset 9%, Portable games player 9%, Desktop/tower computer 8%.

Weighted base: All respondents aged 18-50 years, 2024, KSA+UAE (2,000), UK (2311)
*Not shown is: Wireless speakers / wireless soundbar, None of these, Don't know
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

One-fifth of the consumers in the region have purchased a smartphone in first 9 months of the year 2024

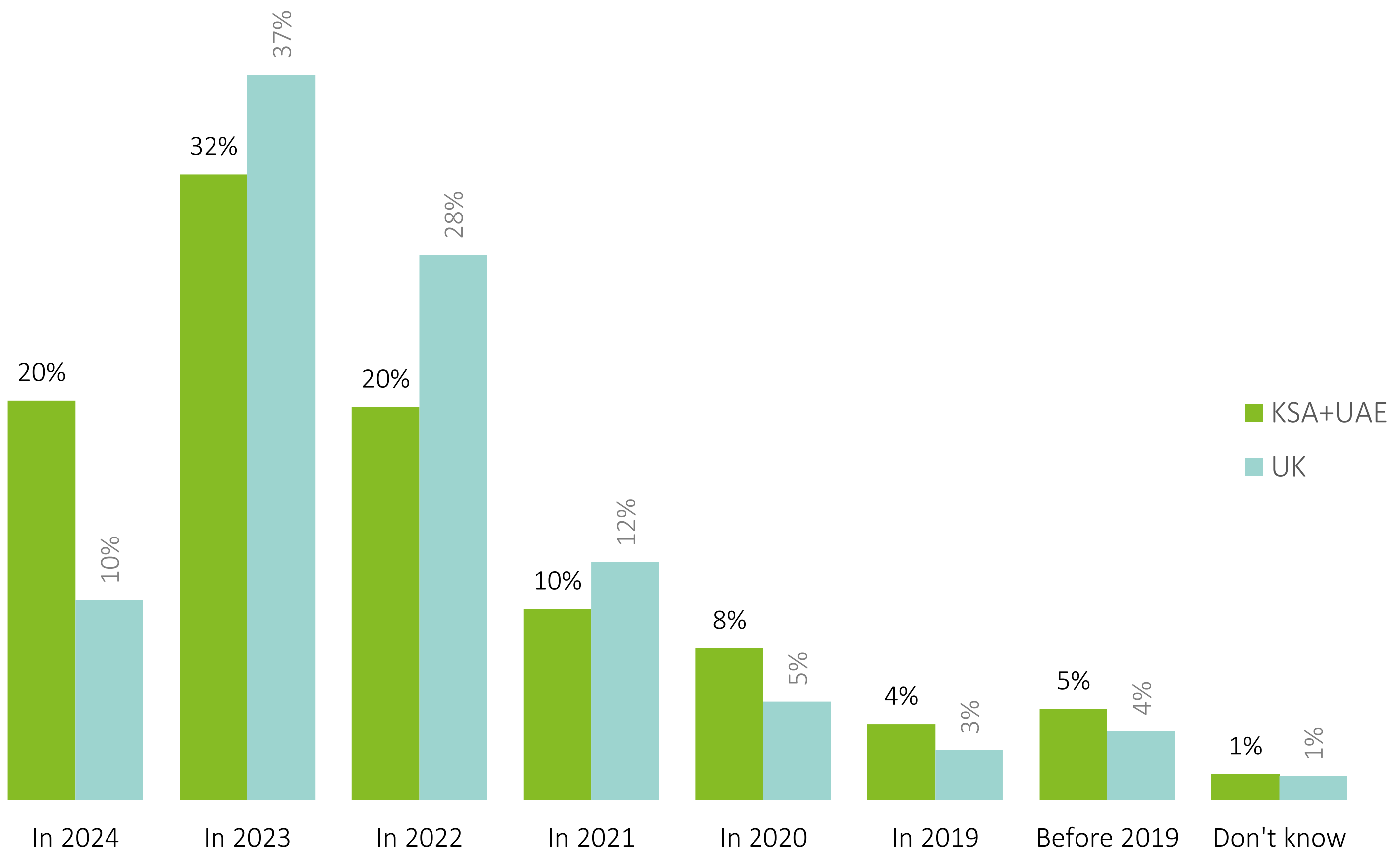
The average life of smartphones in KSA+UAE is less than 2 years.

52% of the KSA+UAE users own a smartphone less than 18-month-old, i.e. less than the average release frequency of most smartphone manufacturers.

In KSA and the UAE, a 5th of the population has purchased a new phone in the past 6 months which is markedly higher than in western geographies including the UK.

Age of smartphone

When did you obtain your current phone?

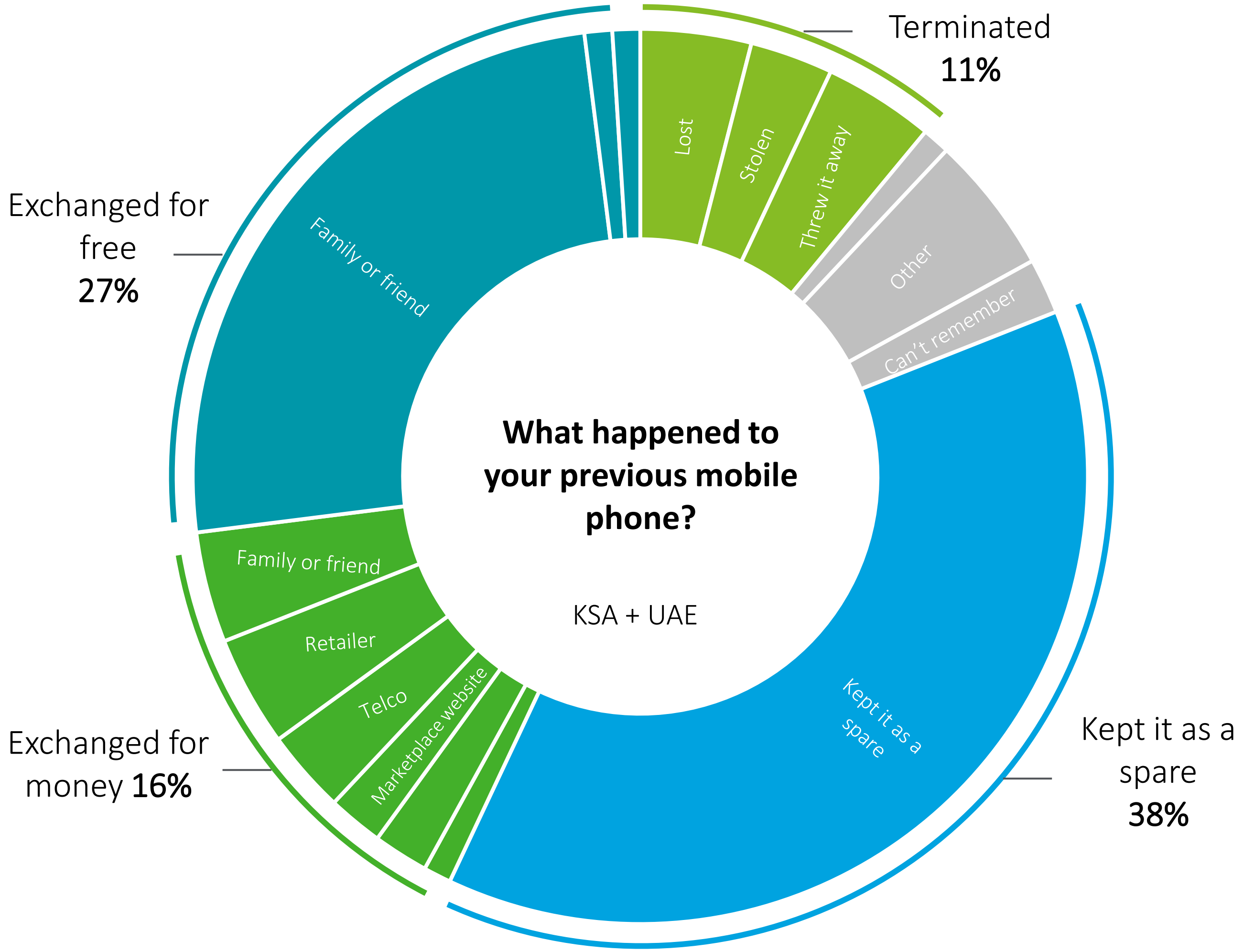


Weighted base: All respondents aged 18-50 years, who have a phone or smartphone, 2024, KSA+UAE (898), UK (1088)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

More than a third of consumers (38%) still keep their old smartphone as a spare

Previous smartphone

What happened to your previous mobile phone when you bought or received your current phone?



Most consumers (38%) keep their old phone as spare to use it in case their new one breaks, or they have some valuable data to protect on the old device.

27% consumers often do not aim for any monetary gain from their old phone – primarily giving it to their family or friends and to a lesser extent recycling it.

Re-selling or exchanging for rebates (retailer etc.) is a practice seldom used in KSA+UAE compared to other markets, with only 16% of consumers.

In the UK, 34% kept their previous smartphone as a spare, 27% sold it in exchange for money, whereas 23% exchanged for free.

Weighted base: All respondents aged 18-50 years, who have a phone or smartphone, 2024 (1,789)

Note: Segments missing labels: Device manufacturer (Green), Recycling company (Green), Recycling scheme (Blue), Returned to Device manufacturer (Blue), Returned to Employer (Grey)

Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Majority of consumers (72%) in the region uses a second-hand device confirming a positive trend for the recycle economy in digital

Devices: Second-Hand Ownership

Which, if any, of the following devices that you currently use were previously owned by someone else?

KSA+UAE consumers have second-hand…

- **40%** Smartphone
- **16%** Tablet
- **26%** Laptop
- **12%** Desktop
- **9%** Portable games player
- **14%** Games console
- **23%** Smart TV
- **9%** VR headset
- **22%** Smart watch
- **6%** eReader

72%

of consumers in the region have at least one second-hand connected device

Second hand products are affordable solutions for consumers to get good quality product. In KSA+UAE the practice is particularly prevalent for smartphones (40%) and laptops (26%). The high frequency of new device purchases in the KSA+UAE population also fuels the second-hand inventory. Adoption of "renewed" devices is markedly higher in the region compared to international markets.

In the UK, 45% of consumers have at least one second-hand or refurbished device. Second-hand ownership is 19% for smartphones, 14% for laptop and 11% for tablet.

Weighted base: All respondents aged 18-50 years, who have used the devices they own or have access to, 2024, KSA+UAE (1,949), UK (2301)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Consumers do not seem to have a full understanding of their carbon footprint

It is not easy for consumers to find accessible and reliable information which states the impact of different technologies on the environment. Consumers do not trust the companies and brands which claim to be environmental-friendly. Their ESG (environmental, social, and governance) ambitions declarations are not yet perceived as credible.

KSA + UAE

56% feel companies often overstate their "green" image

46% trust that tech companies are transparent when declaring their carbon footprint

43% have regular conversations with family and friends about carbon footprint

25% have some idea what their carbon footprint is

In the UK, 63% feel companies often overstate their "green" image while 34% trust that tech companies are transparent when declaring their carbon footprint.

Weighted base: All respondents aged 18-50 years, 2024, KSA+UAE (2,000), UK (2311)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

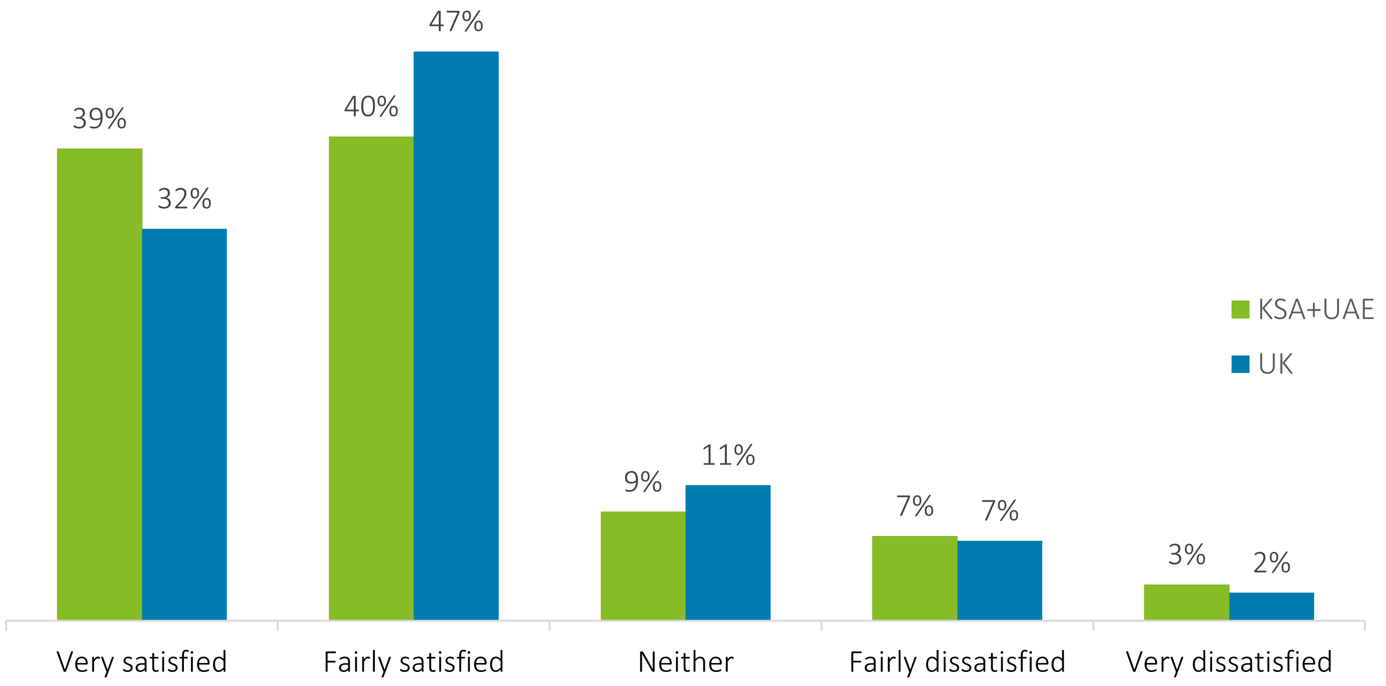
NETWORKS

Broadband satisfaction levels are high and on-par with international markets

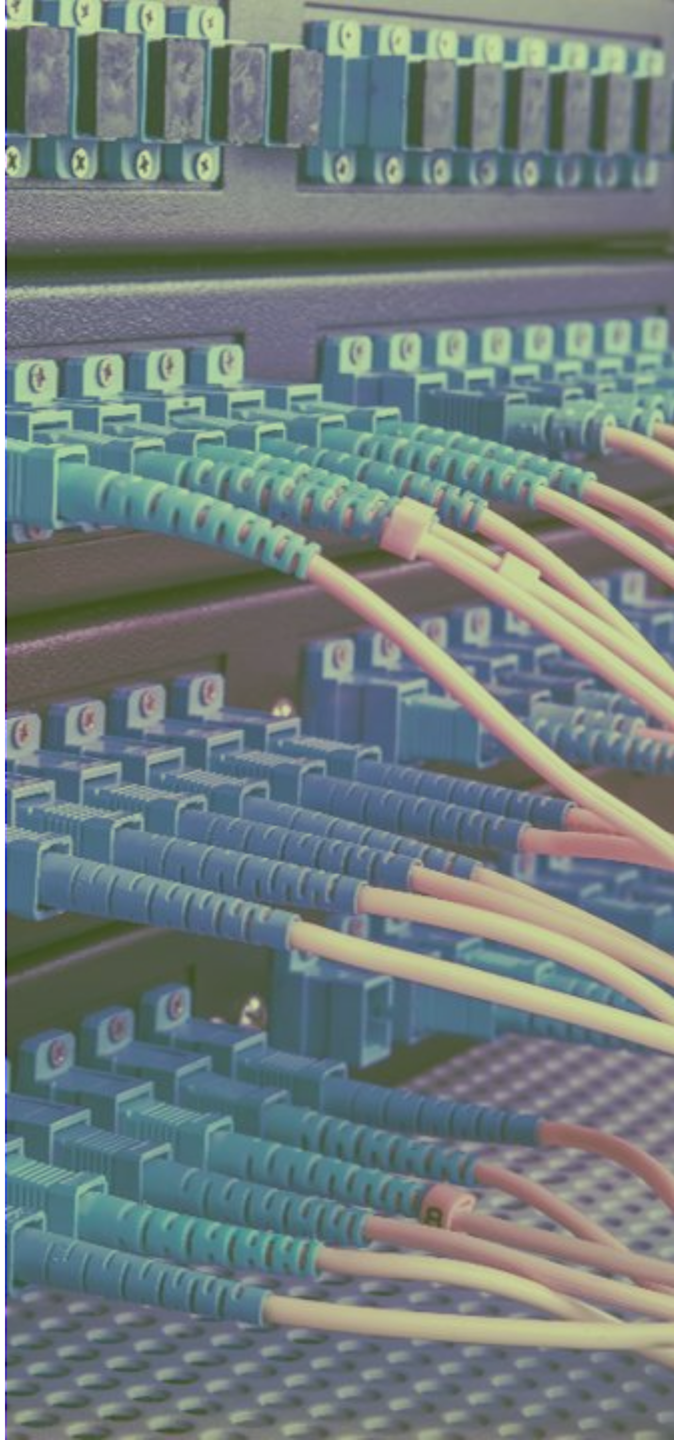
79% of the users in KSA+UAE are "satisfied" with their broadband connection, with almost two in five being "very satisfied". The overall satisfaction level is on par with the UK.

Satisfaction with internet connection

How satisfied or dissatisfied are you with your internet connection overall?



Weighted base: All respondents aged 18-50 years, with an internet connection at home, 2024, KSA+UAE (1,045), UK (2013)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024



On average, 13% of the broadband customers enjoy more than 1 Gbit/s of internet speed

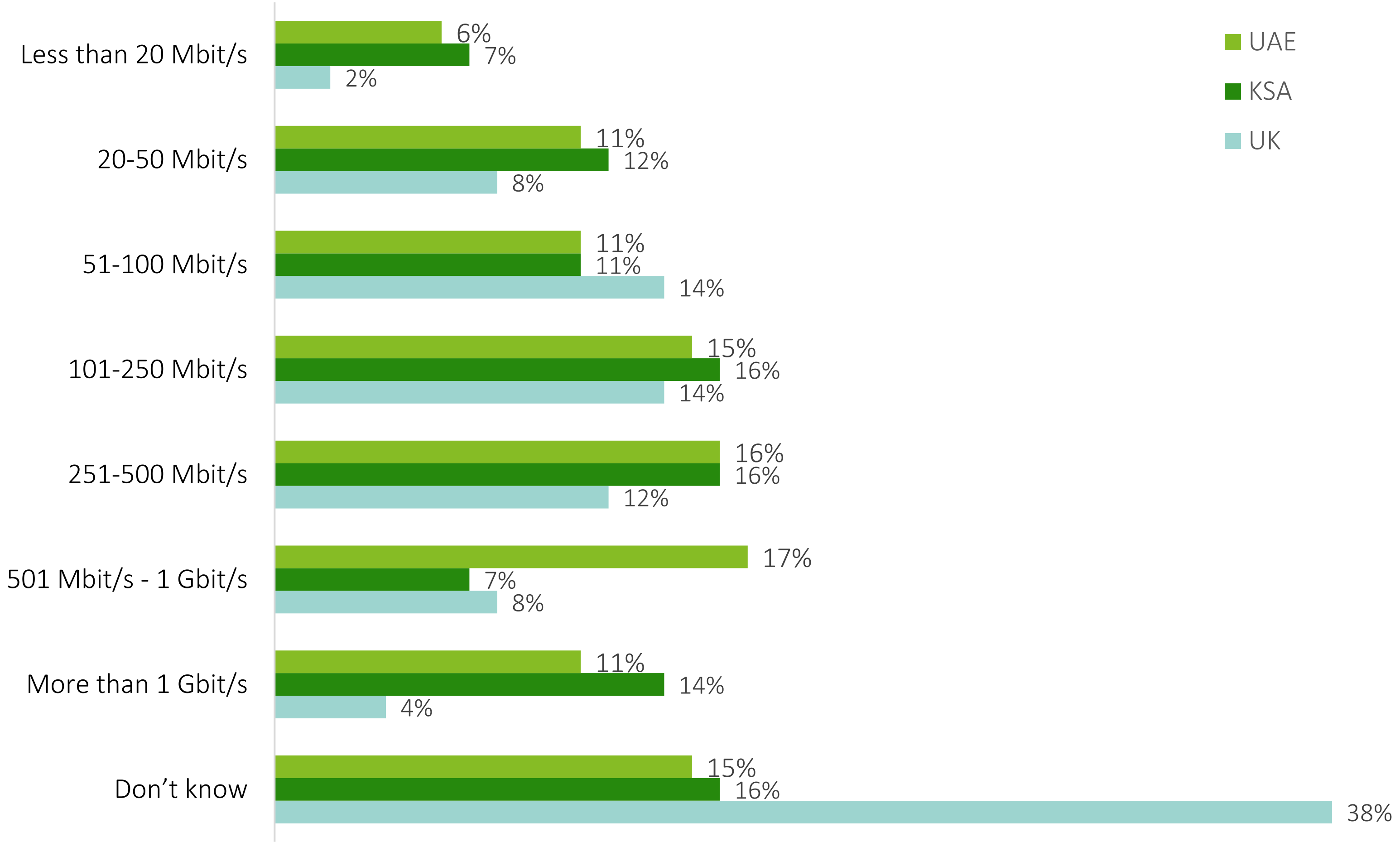
In the UAE, 28% of the customers enjoy more than 500 Mbit/s of internet speed, while 21% of the customers experience such high speed in KSA.

Overall, customers in the region enjoy better internet speed as compared to the UK. In the UAE for instance almost 30% claim to have a 500 Mbps or higher broadband speed (compared to 12% in the UK), in line with the prevalence of FTTH in the country.

Interestingly, people in UAE and KSA are much more aware about their broadband speed, as compared to the UK wherein 38% do not know the speed of their internet they have been using on day-to-day basis.

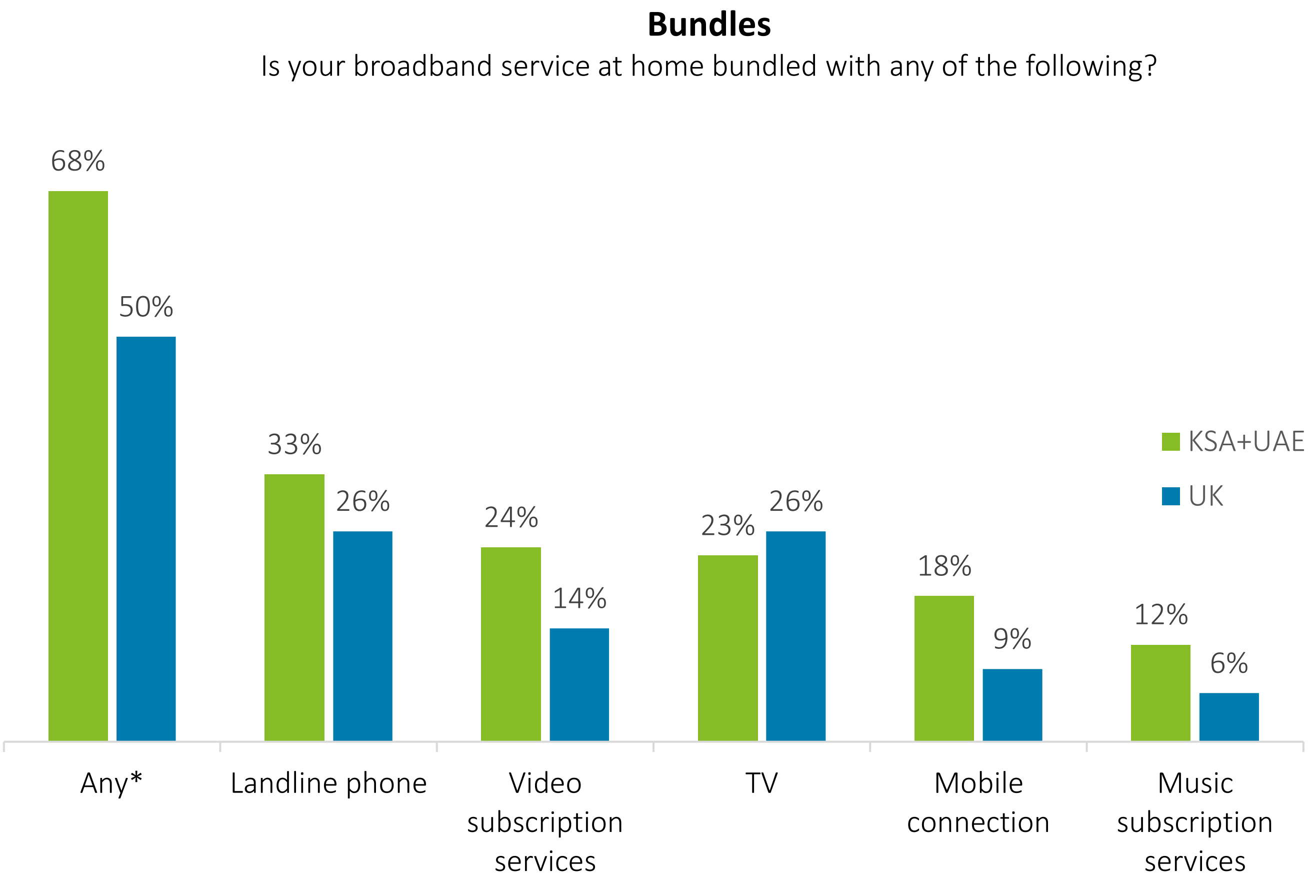
Broadband Speeds

How fast is the home internet connection you currently have?



Weighted base: All respondents aged 18-50 years, with an internet connection at home, KSA (409), UAE (636)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

More than two-third (68%) of the households in the region, buy broadband bundled with other services



Overall, there is only a minority of households (32%) in KSA and UAE buying only broadband services from their telco providers. Telcos in the region have managed to secure a higher rate of adoption of their dual-play, triple-play or quad-play subscriptions compared to other Western Markets such as the UK.

Landline phone and broadband remain popular although there is a clear age divide with 45–50 years old markedly more inclined to take this bundle (42%) compared to younger age groups.

On the other end, video subscription (i.e. OTT, not IPTV) is particularly attractive among 25–34 years old (29%).

There is still limited take up on mobile+fixed bundling, although a higher take up than in the UK due to different competitive dynamics in the market.

Lastly music subscription services bundling is a relatively newer trend and just starting to pick up adoption.

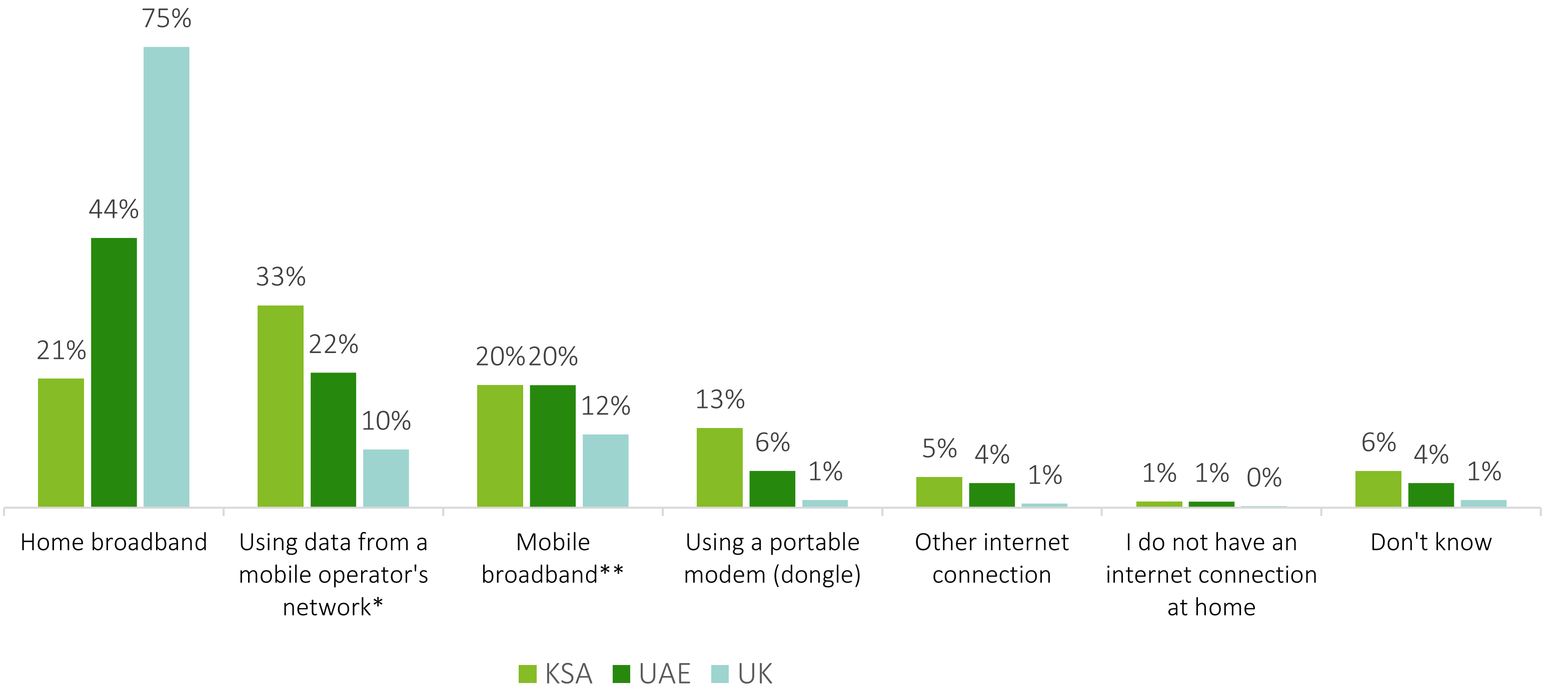
*Any refers to aggregated value that indicates the total percentage of respondents who said yes to having any type of broadband bundle, including landline phone, and/ or video subscription, and/ or TV, and/or mobile connection, and/ or music subscription.

Weighted base: All respondents aged 18-50 years, who have home broadband, 2024, KSA+UAE (651), UK (1736)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Only one-third of KSA+UAE consumers use home broadband connection, as compared to 75% in the UK

Primary Internet or Broadband Connection

Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household?



*Using data from a mobile operator's network: e.g., 4G/5G – usually on a smartphone or tablet, and includes tethering other devices to smartphone or tablet to use data via a hotspot

**Mobile broadband – the internet connection to your modem comes from a mobile network, and your devices connect via Wi-Fi or a wired connection (e.g., geo-tagged Du Home Wireless)

In KSA, mobile broadband in various forms (on the mobile, on hotspot or on dongle) is the significant majority of internet access (66%). This confirms the trend that fixed broadband access is not the primary mode of access even at home (21% only) due to a number of factors such as content consumption habits and quality of infrastructure.

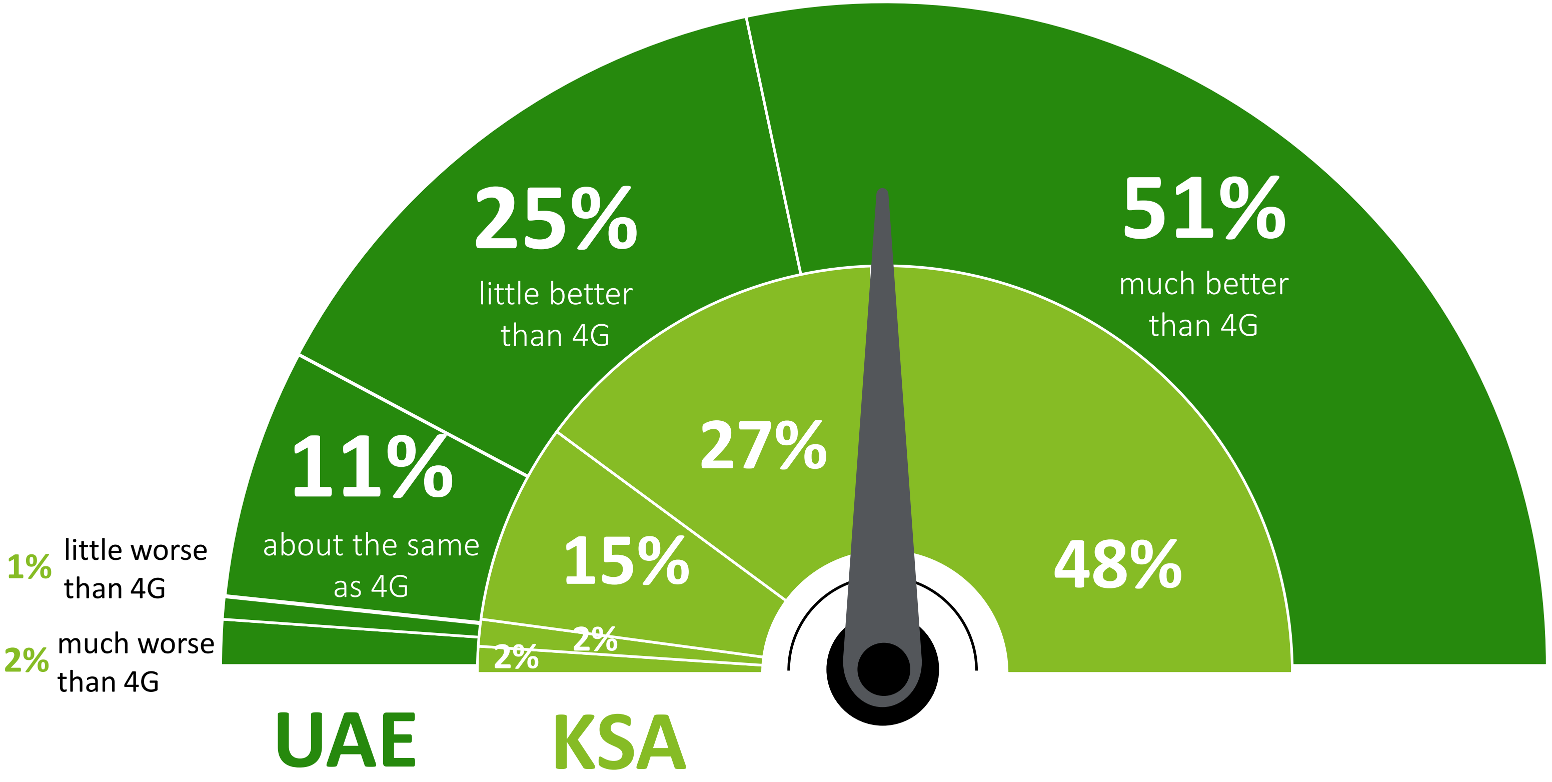
In the UAE where Fiber to the Home is more prevalent, the number of home broadband (fixed access) users jumps to 44% although still lower than in the UK where the vast majority of broadband access at home is via a fixed broadband connection.

Weighted base: All respondents aged 18-50 years, 2024 (2000)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

More than half of the customers in the region, feel that 5G is much better than 4G

4G vs 5G

Since using a 5G network on your phone, how has your overall experience of mobile internet been?



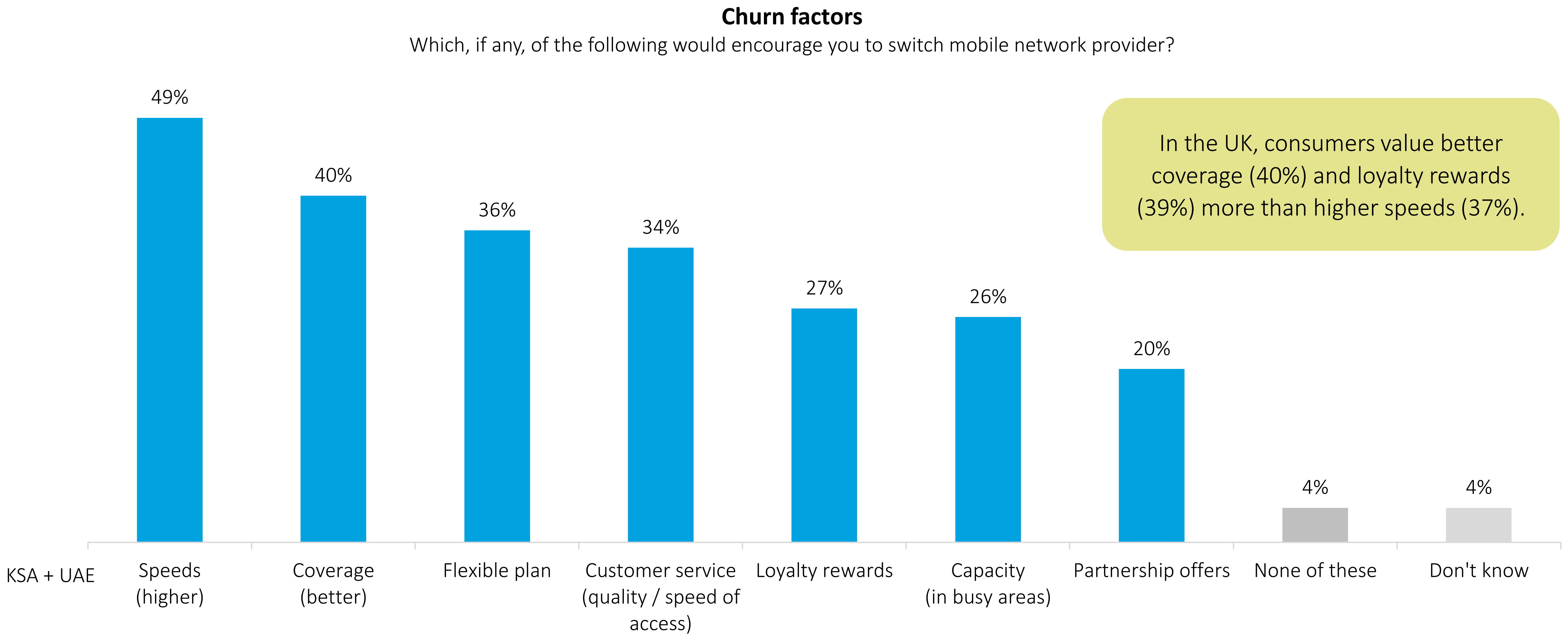
Users in the region have a strong perception of the enhancement of the mobile internet experience on 5G compared to 4G. This is due in part to the technology itself (faster download speed and lower latency) but probably also thank to the marketing push of the telecom operators on the benefits of 5G.

Indeed, when compared to other markets, the perception in KSA+UAE is significantly stronger towards 5G than for instance in the UK. Again, this could partially reflect deployment and partially differences by the telcos in marketing the technology.

In the UK, only 28% feel 5G is “much better than 4G” and 28% feel 5G is about the same as 4G.

Weighted base: All respondents aged 18-50 years who currently have 5G on their main phone, 2024: KSA (567), UAE (670)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Consumers value higher speed and better coverage more than loyalty rewards and partnership offers



In the UK, consumers value better coverage (40%) and loyalty rewards (39%) more than higher speeds (37%).

Weighted base: All respondents aged 18-50 years, All adults 16-75 who have access to a phone or smartphone 2024 (1,789)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024


VIDEO

Paid digital subscription by Consumers in KSA+UAE is significantly less compared to Western markets such as the UK

67%

of consumers have a paid digital subscription to a **Video** streaming service

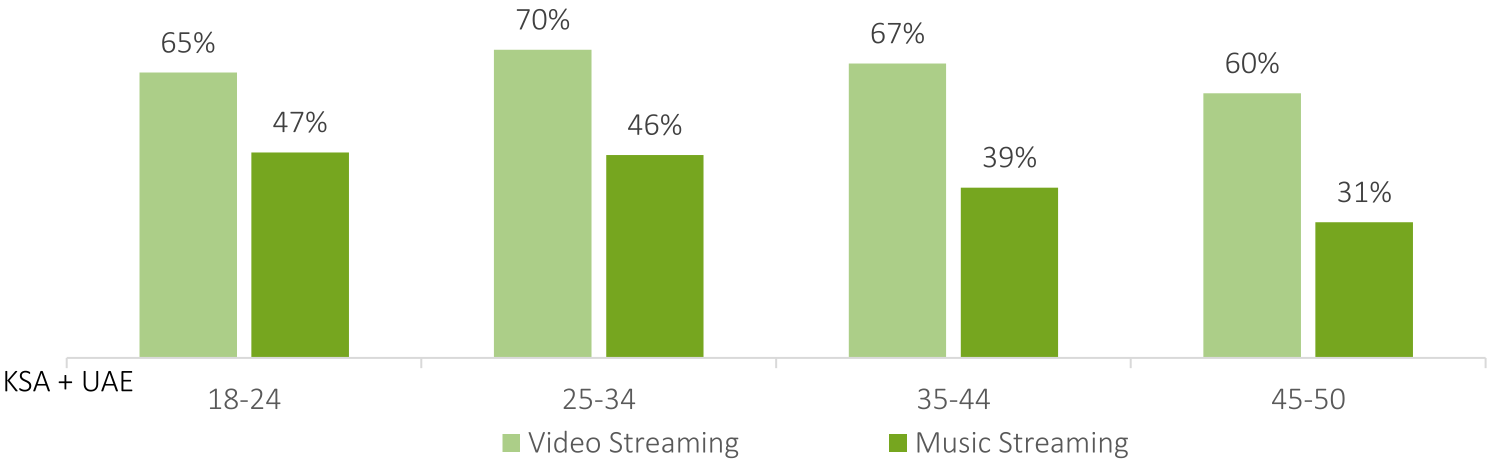
43%

of consumers have a paid digital subscription to a **Music** streaming service

As expected, adoption of video and music subscription attracts younger age groups with a "peak" in the 25-34 age band considering affordability. However, overall, the region is still grasping with paid subscription for digital content (both video and music) and the gap with the UK is significant.

Video and Music Subscriptions (by age group)

Which, if any, of the following paid digital subscription services do you have access to?* [Video, Music]



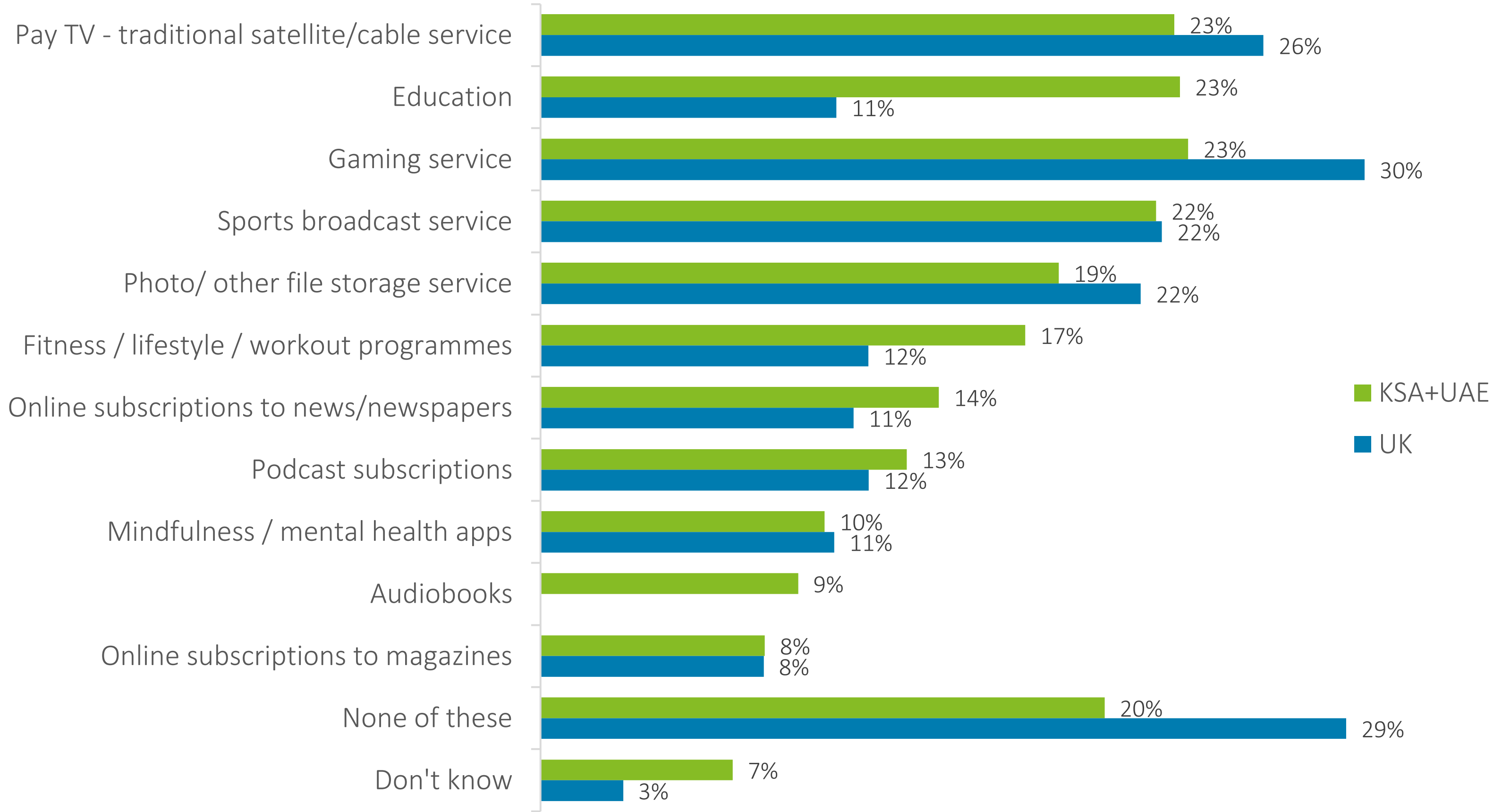
In the UK, overall paid video streaming subscription is 85%, and the paid music streaming subscription is 63%.

Weighted base: All respondents aged 18-50 years, 2024 (2,000)
*Respondents were given choices, including Apple Music, Spotify Premium, YouTube Music, Amazon Music Unlimited, Amazon/Prime Music, and others.
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Pay TV, Education, Gaming, and Sports – are the most popular paid subscription by the consumers in the region

Access to Paid Subscription

Which PAID services or subscriptions do you have access to?

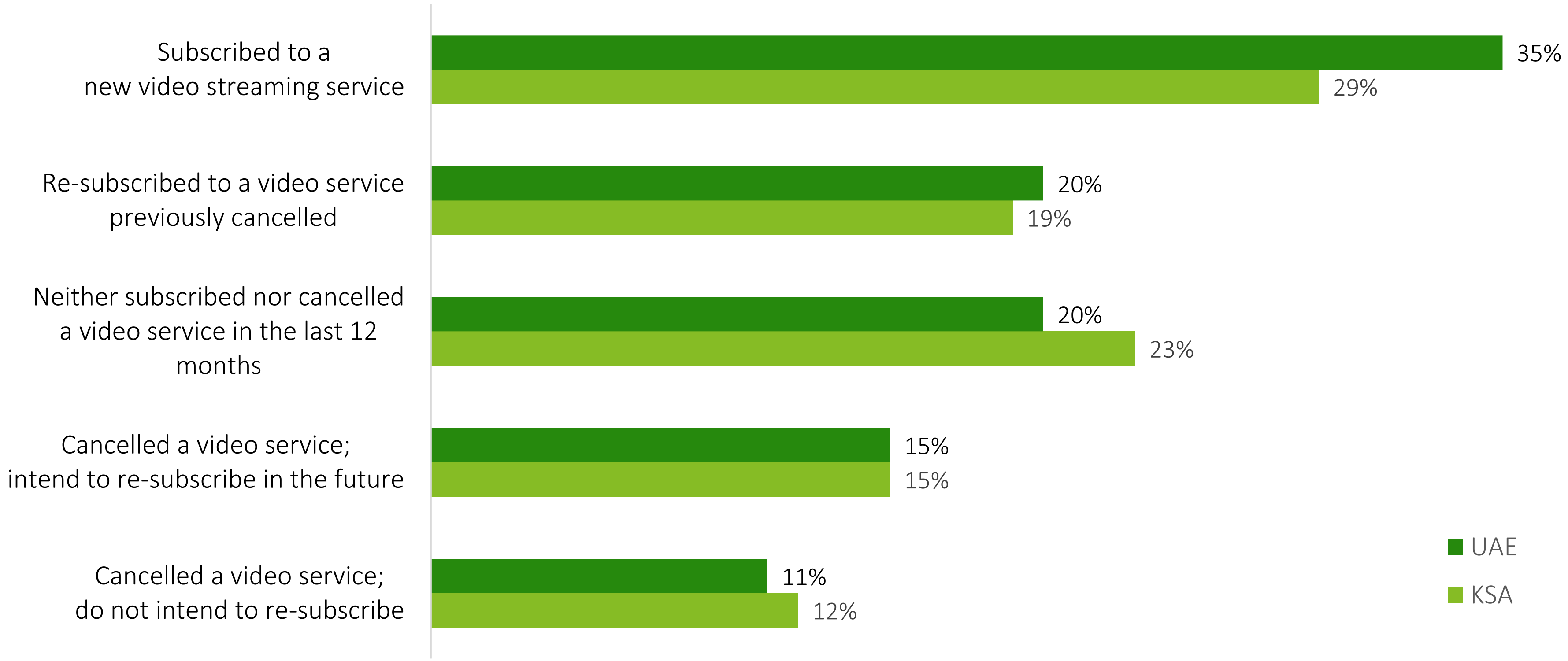


Weighted base: All respondents aged 18-50 years, 2024, KSA+UAE (2,000), UK (2311)
*not shown are respondents who answered None of these, Don't Know
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

In the region, more than 50% respondents have subscribed to a video streaming service in the last 1 year

Subscribing and Churning

In the last 12 months, have you or your household subscribed to any paid subscriptions for a video streaming service, or cancelled any existing ones?



51% subscribed to a service in KSA+UAE as compared to **44%** in UK

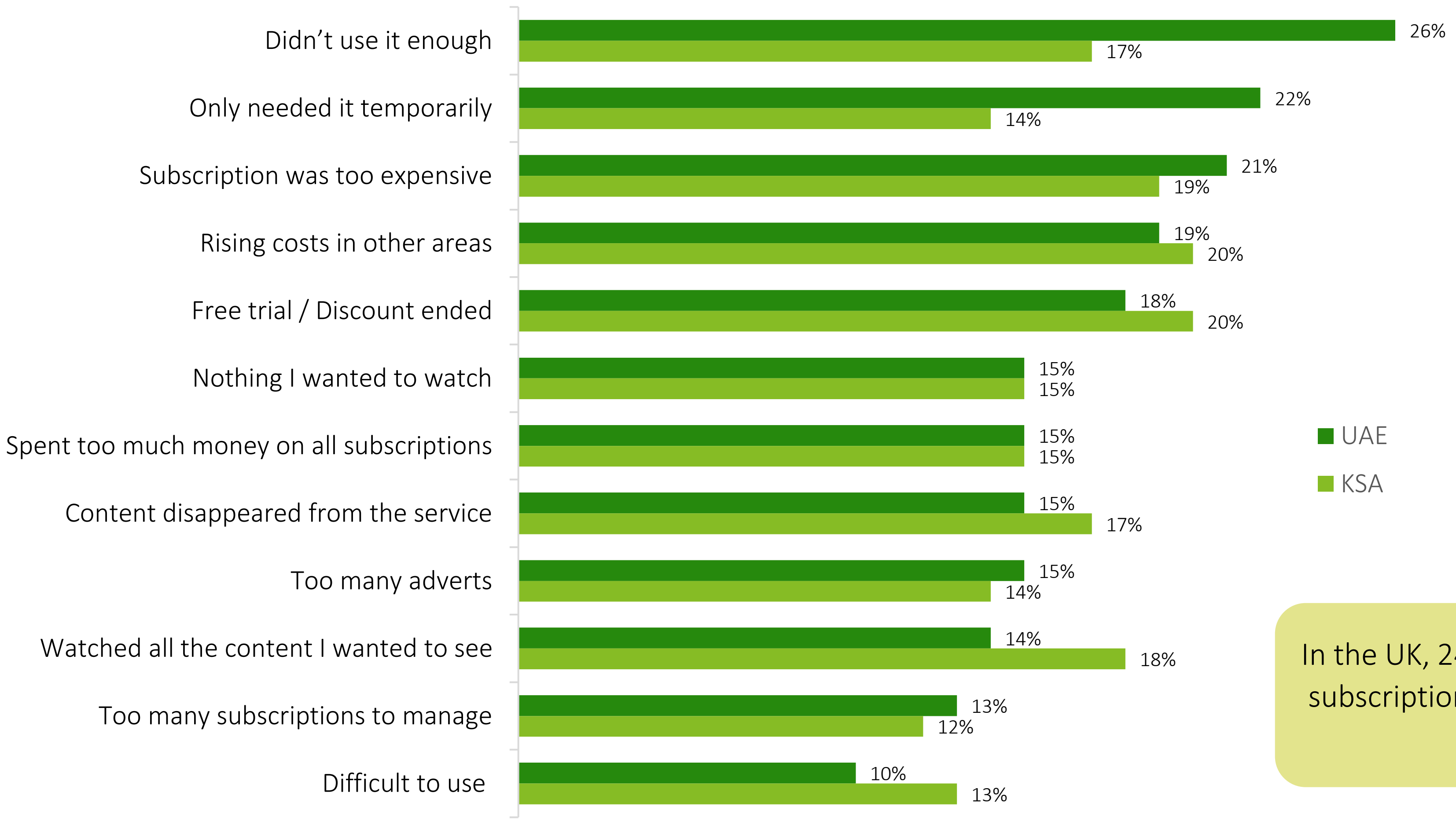
25% cancelled** a service in KSA+UAE

Weighted base: All respondents aged 18-50 years, KSA (1,000), UAE (1,000)
*Not shown are respondents who answered Can't Remember: KSA (19%), UAE (16%)
** Cancelled a video streaming service in the past 12 months
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

High costs and limited continued usage were the key contributors to churn among SVOD users

SVOD: Reasons for Cancelling

You have cancelled a paid subscription for a video streaming service in the last 12 months, why?



Consumers in the region have cancelled a paid subscription driven by a cost-related reason, wherein 20% felt subscription was too expensive and 15% mentioned about spending too much money on all subscriptions.

21% consumers have cancelled the paid subscription as they did not use it enough, while 19% cancelled it after the free trial ended.

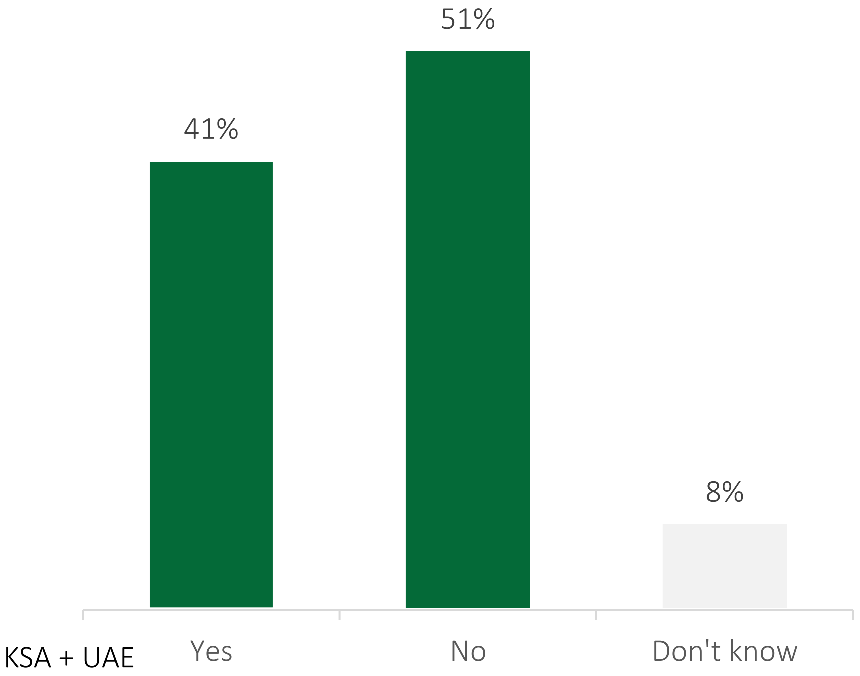
In the UK, 24% reported that they have cancelled a paid subscription, as it was too expensive; and 29% claimed that they did not use it enough.

Weighted base: All respondents aged 18-50 years, who cancelled a paid video service in last 12 months, KSA (381), UAE (383)
*Not shown are respondents who answered Don't Know, Other reason, Content inappropriate for children
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

47% claim to be impacted by the SVOD account sharing crackdown – likely reflecting a higher rate of account sharing historically in KSA+UAE

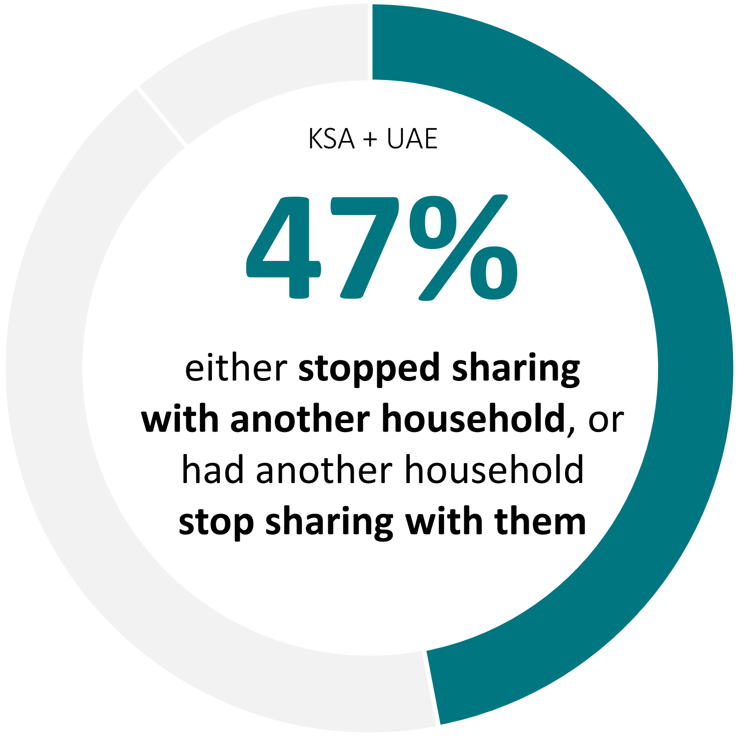
Sharing Crackdown

Do you share a PAID video streaming services or subscriptions account with somebody outside of your household?



Two in five, who have access to any paid video subscription service, share an account with somebody outside of their household.

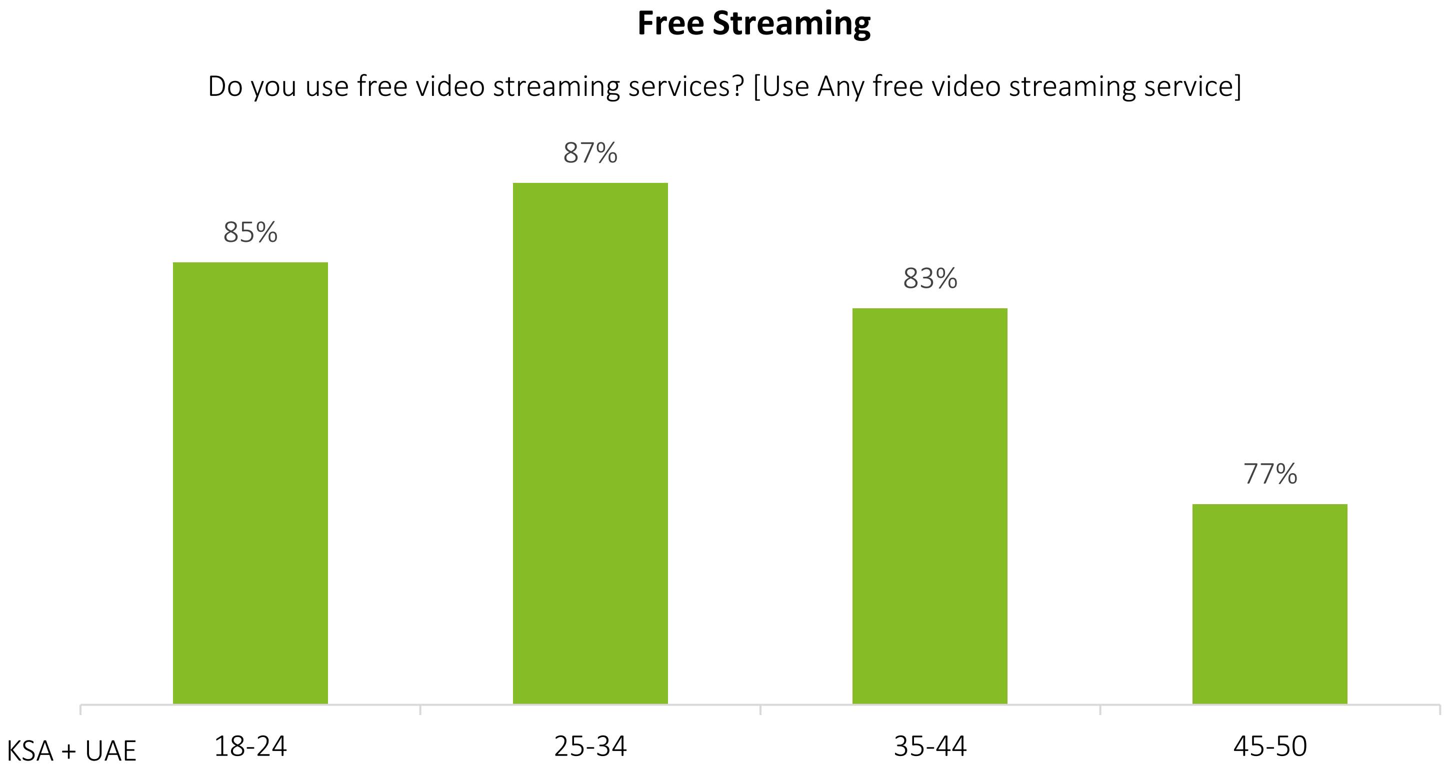
In the last 12 months, have you stopped sharing access to a video streaming service with another household because the provider ended free sharing?



This is a much higher proportion compared to the UK where 22% reported that they have stopped sharing an SVOD account with another household due to password-sharing crackdown.

Weighted base: All respondents aged 18-50 years, 2024 (2,000)
*Not shown are respondents who answered Don't Know, No/Not applicable
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Majority of consumers have used a free streaming service



84% respondents in region use a free video streaming service, as compared to **91%** in the UK.

Weighted base: All respondents aged 18-50 years, 2024 (2,000)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024


ONLINE

Across the age groups, social media is the primary source of news content for most residents in KSA and the UAE, significantly above mainstream news outlets including TV news or News websites/ apps

News consumption via social media (including influencers and celebrities online) is now the most preferred method for staying updated on news / current events, driven by factors such as widespread mobile connectivity, high internet penetration, and social media usage, among all age groups.

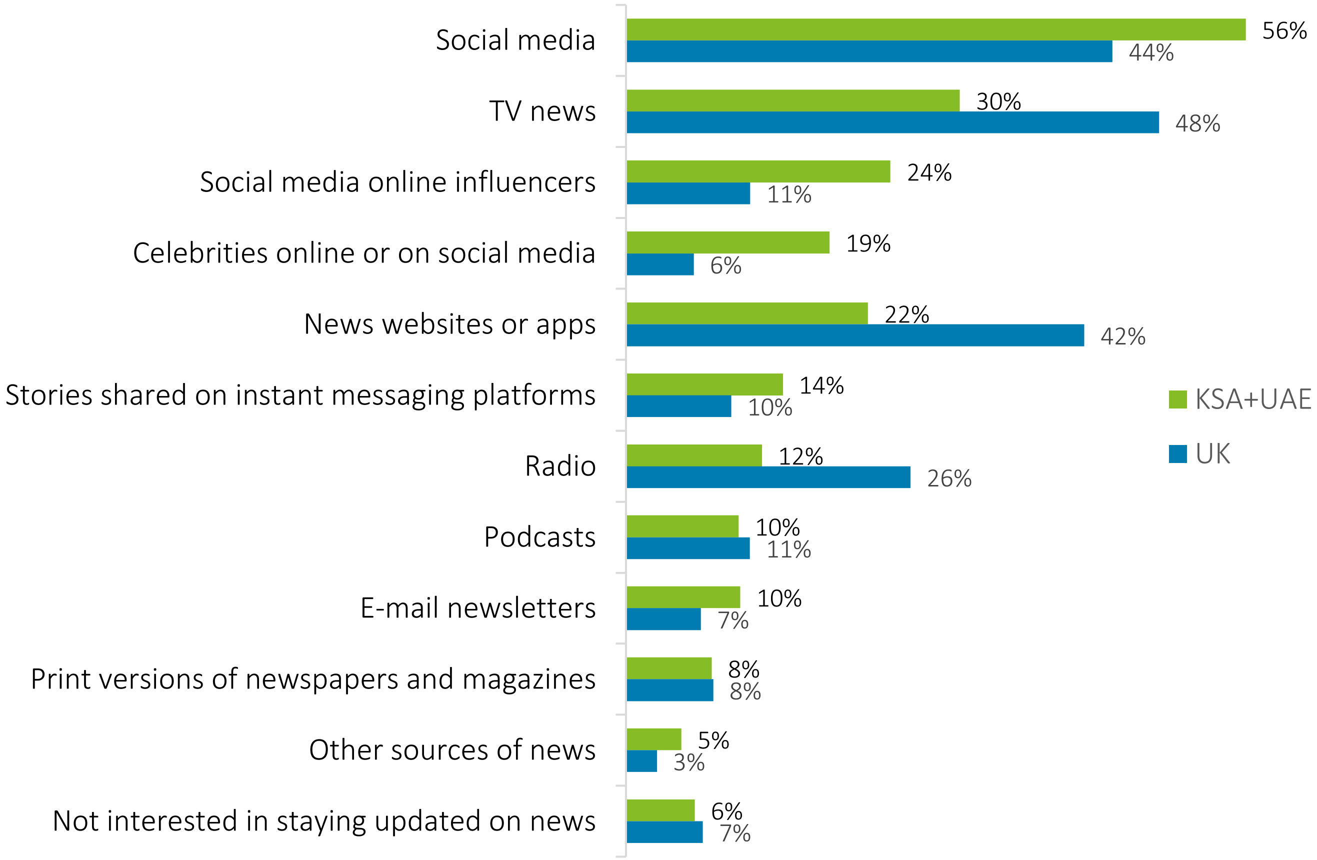
Comparatively, reliance on traditional news outlet is low at 30% for TV and 22% for news websites and even lower for Radio. This trend also has an impact on the quality and reliability of the sources of information consumption.

In comparison, in the UK 48% prefer TV news, 42% view news websites/ apps, and 26% listen to radio news; which are much higher to the preference of users in KSA+UAE.

News

What are your most preferred methods to stay updated on news or current events?

[Respondents selected top three]



Weighted base: All respondents aged 18-50 years, 2024 (2,000), Social Media (1,127), TV News (607)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

One in five (20%) made a purchase via influencer post or affiliate link on social media

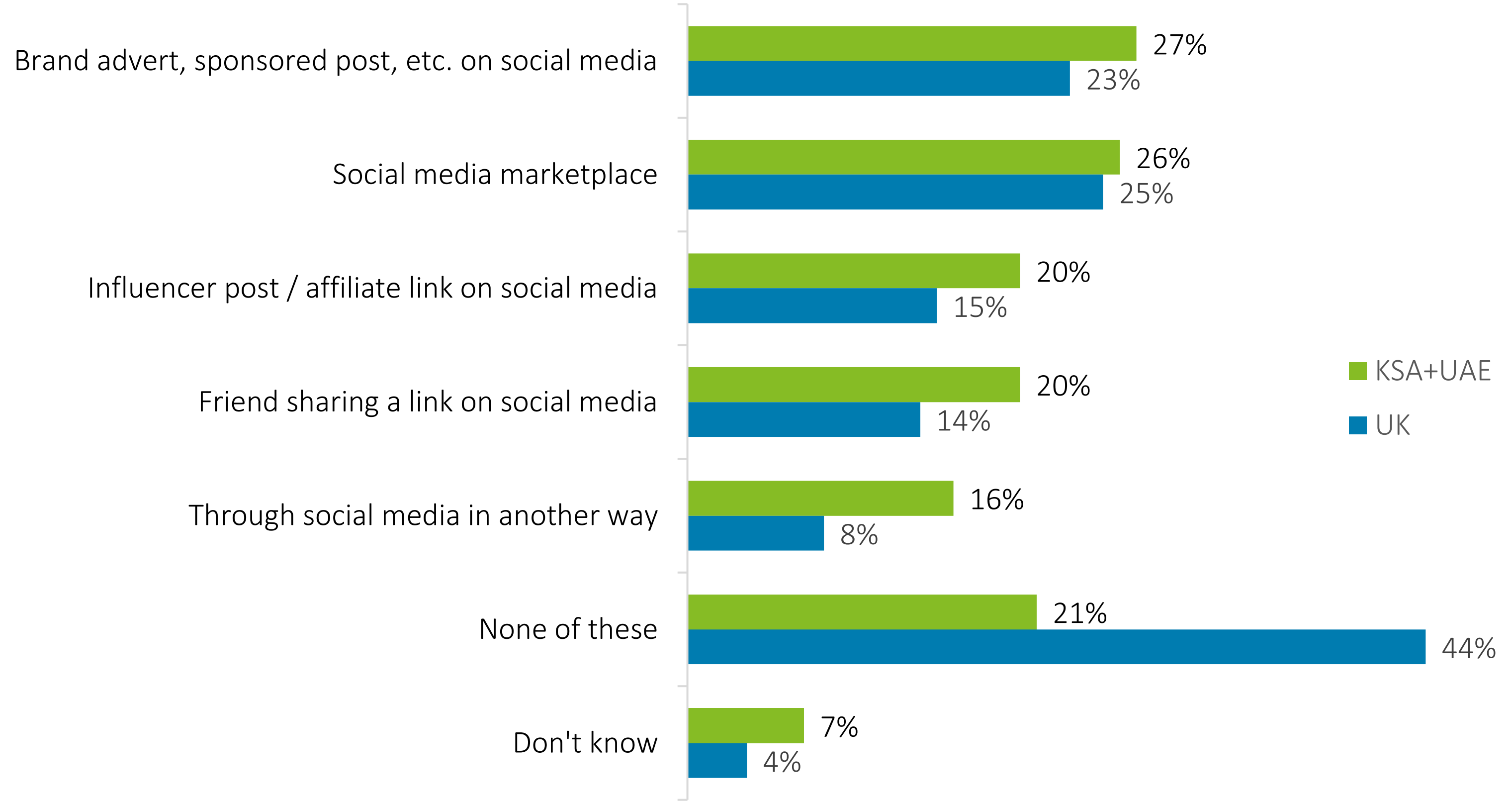
73%

made a purchase through social media in the past 12 months, confirming the rising trend of social commerce and the impact of influencers on the buying habits of the customers. This has also led to changes in marketing patterns/ advertising spend, wherein more and more influencers are considered by brands to reach consumers directly through social media.

This is quite in contrast with the UK where only **52%** made a purchase through social media in the past 12 months.

Social Media Purchasing

In the last 12 months, in which of the following ways have you made an online purchase through a social media platform?

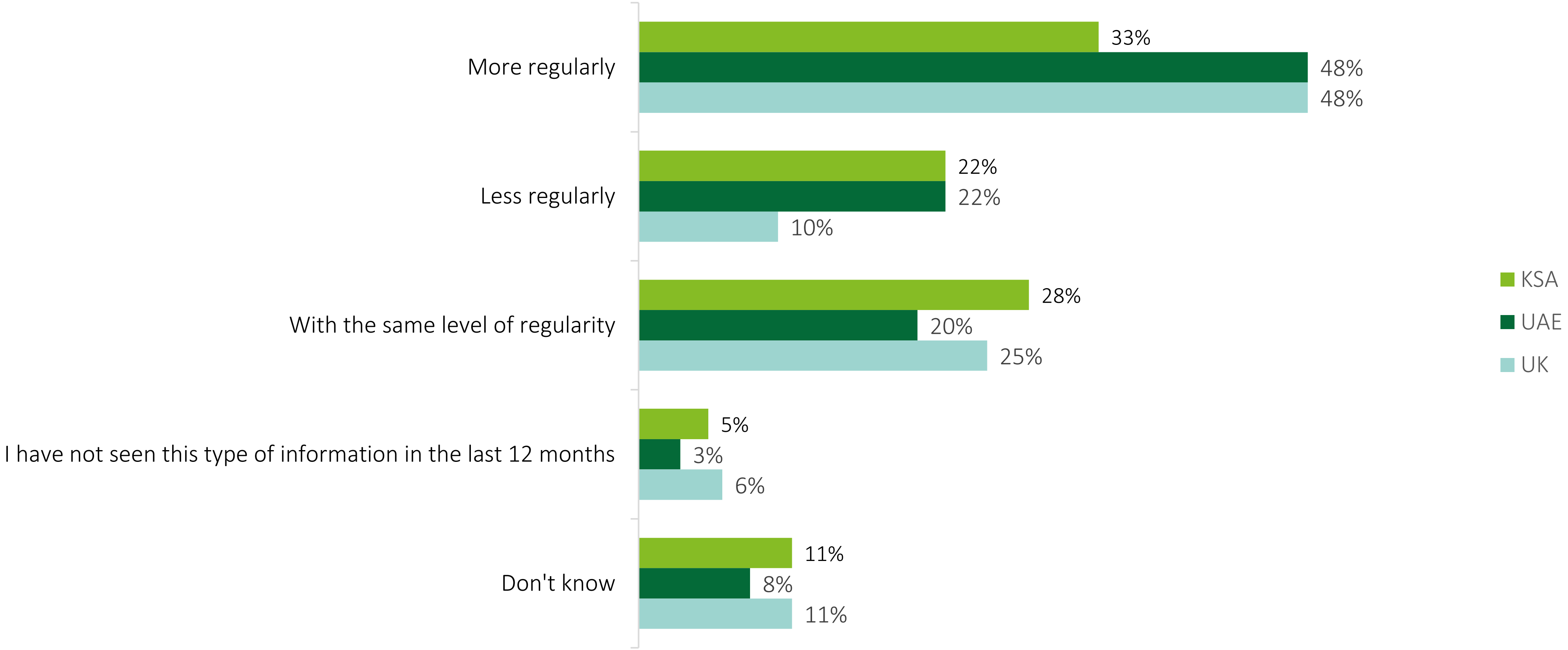


Weighted base: All respondents aged 18-50 years, 2024, KSA+UAE (2,000), UK (2311)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Online misinformation has become more prevalent in the region, particularly in UAE with 48% consumers saying that they see misinformation more regularly than 12 months ago

Online Misinformation

Are you seeing misinformation more, or less regularly than 12 months ago?*



Weighted base: All respondents aged 18-50 years, KSA (1000), UAE (1000)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

*Full question: The next question is about information that is presented to be true on social media, but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?

Almost two-third of respondents have used at least once a mental health application

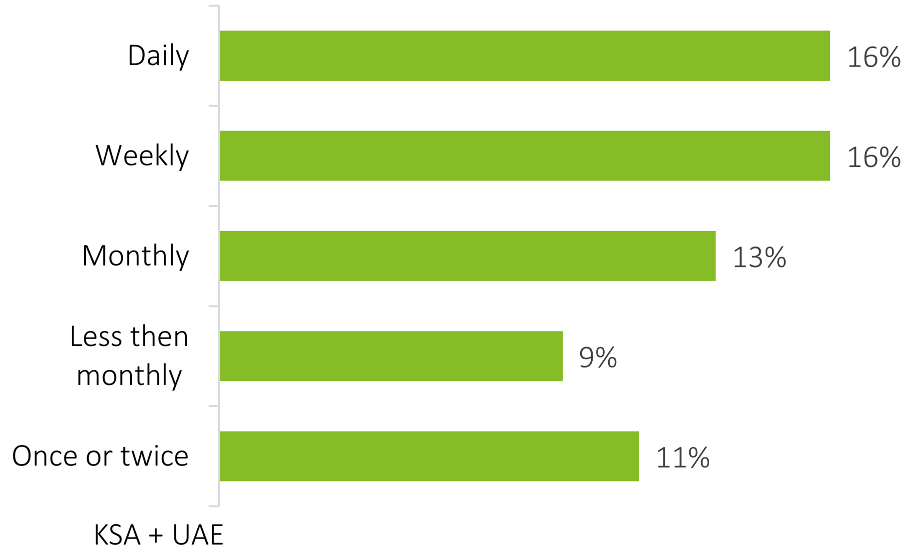
In the region, 16% of the respondents use an app for mental health support, wellness or mindfulness daily

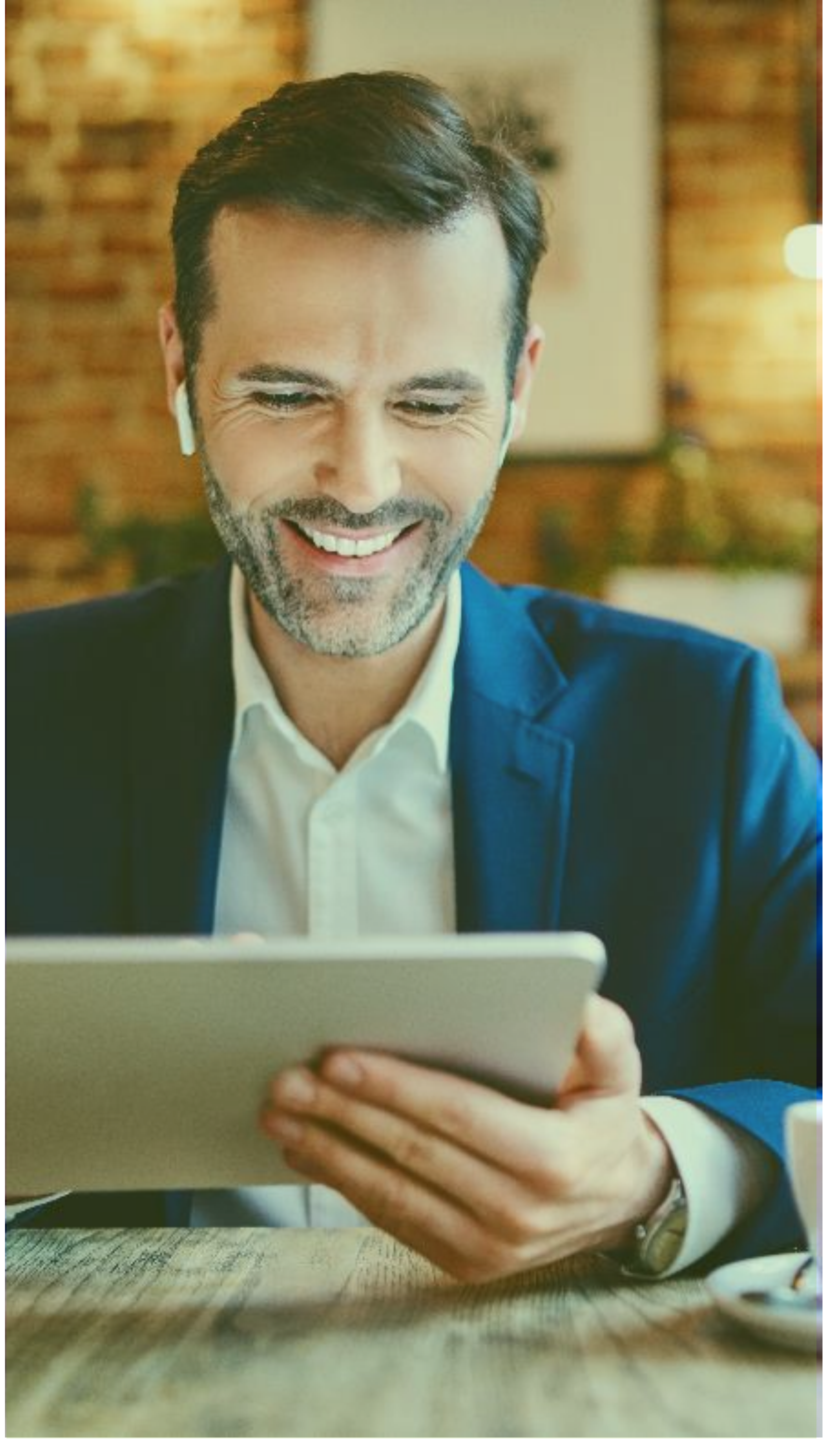
65%

have used a dedicated app for mental health, wellness or mindfulness in KSA+UAE. Whereas in UK this stands at **57%.**

Mental Health Applications

How often, if at all, do you personally use apps dedicated to mental health support, wellness or mindfulness?





Weighted base: All respondents aged 18-50 years, who have a smartphone, 2024 (1,743)
Source: Deloitte Digital Consumer Trends, ME and UK, 2024

Contact us for more information

Emmanuel Durou

Partner and Technology, Media & Telecommunications Leader

Deloitte Middle East

edurou@deloitte.com

Sundeep Vachhani

Senior Manager, Technology, Media & Telecommunications

Deloitte Middle East

suvachhani@deloitte.com

Diana Czentye

Senior Manager, Technology, Media & Telecommunications

Deloitte Middle East

diczentye@deloitte.com

Deloitte.