VIEWS ON SUSTAINABILITY

Egypt Edition

August 2023

GAME CHANGERS

Ipsos

Report Overview

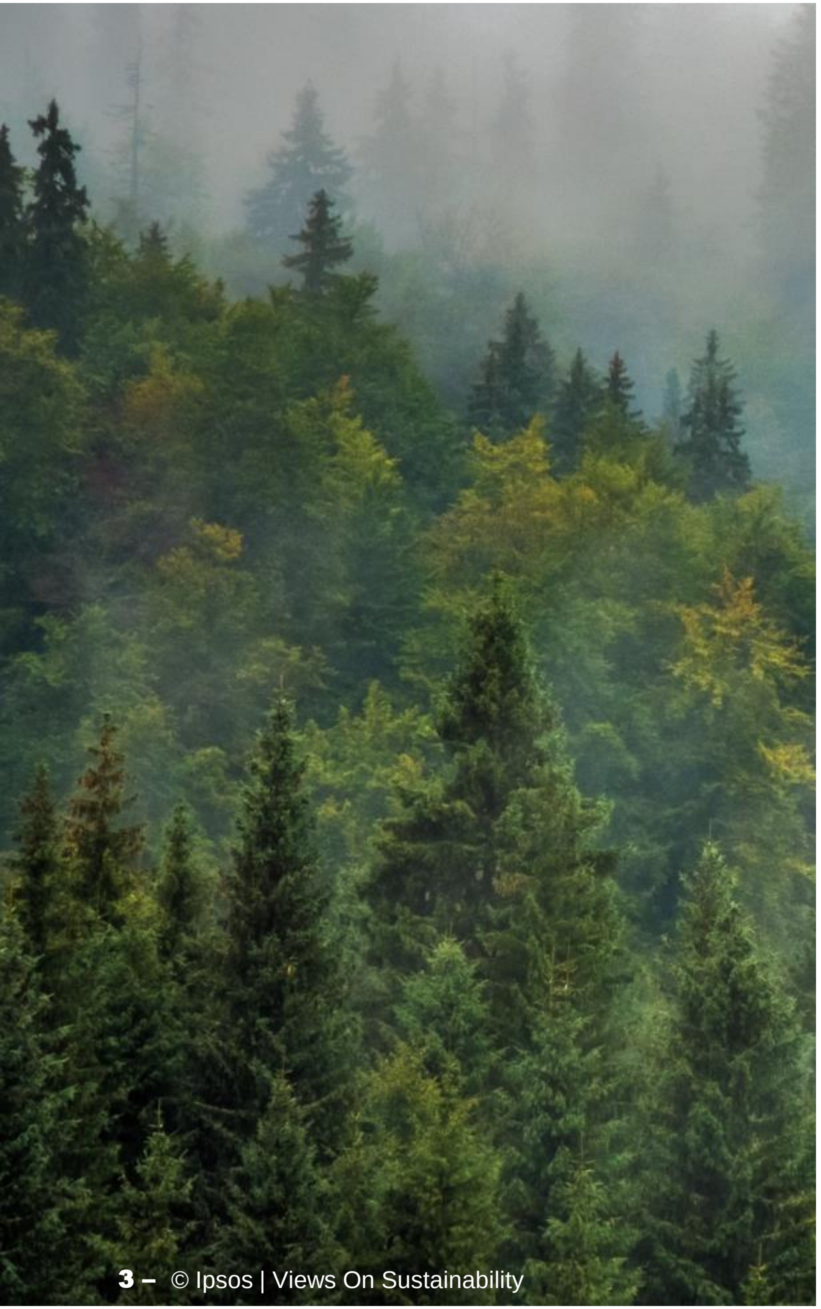
1 HOW CONCERNED ARE PEOPLE ABOUT ENVIRONMENTAL ISSUES?

2 THE PUBLIC'S UNDERSTANDING OF SUSTAINABILITY

3 ACTIONS TAKEN TO LIVE MORE SUSTAINABLY

4 SUSTAINABILITY RESPONSIBILITY & INDUSTRY PERCEPTIONS

5 ATTITUDES TOWARDS SUSTAINABILITY



HOW CONCERNED ARE PEOPLE ABOUT ENVIRONMENTAL ISSUES?

1 In 6 Acknowledge Environmental Issues As A Primary Global Concern

16%

Have Concerns About The Environment

By Gender

Male	18%
Female	15%

By Age

18 - 24	21%
25 - 34	15%
35 - 44	16%
45+	15%

By Income Level

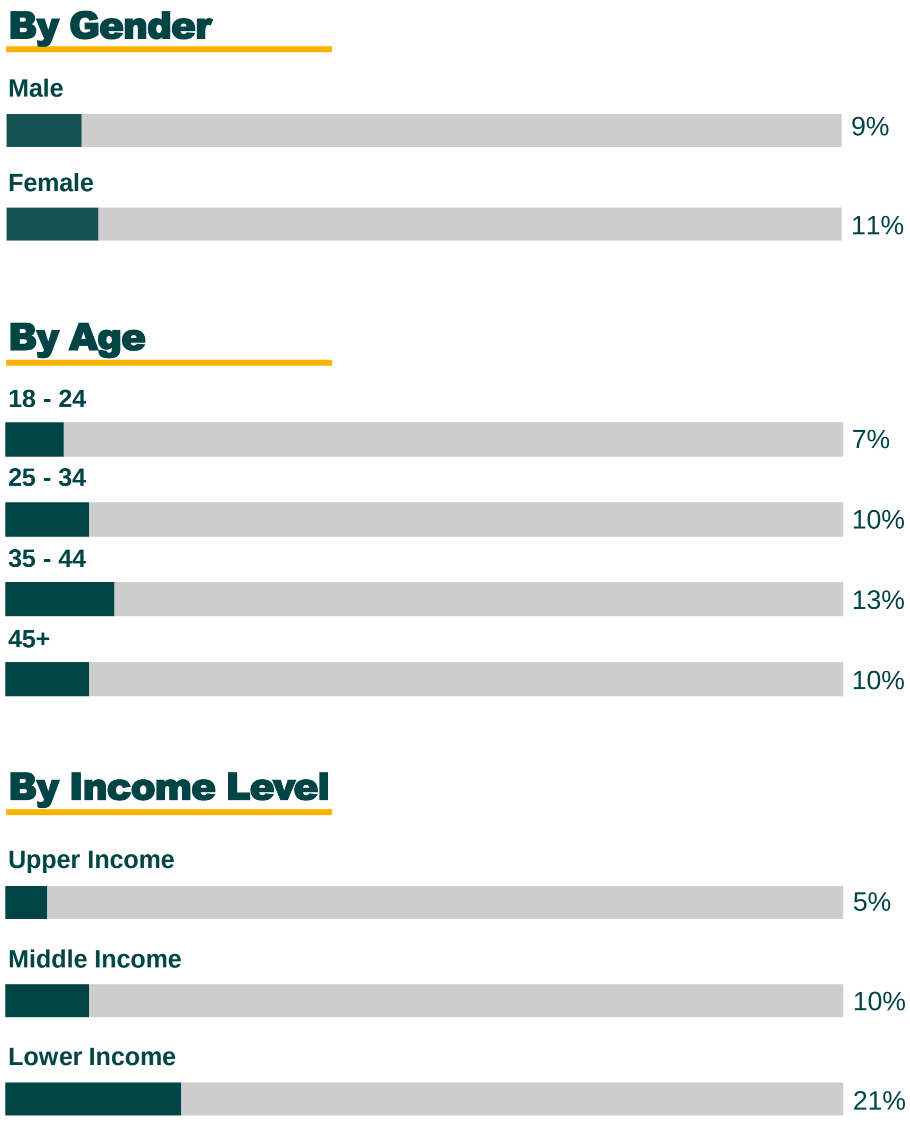
Upper Income	22%
Middle Income	13%
Lower Income	21%

Q: Which do you think are the 3 biggest issues affecting the world today?

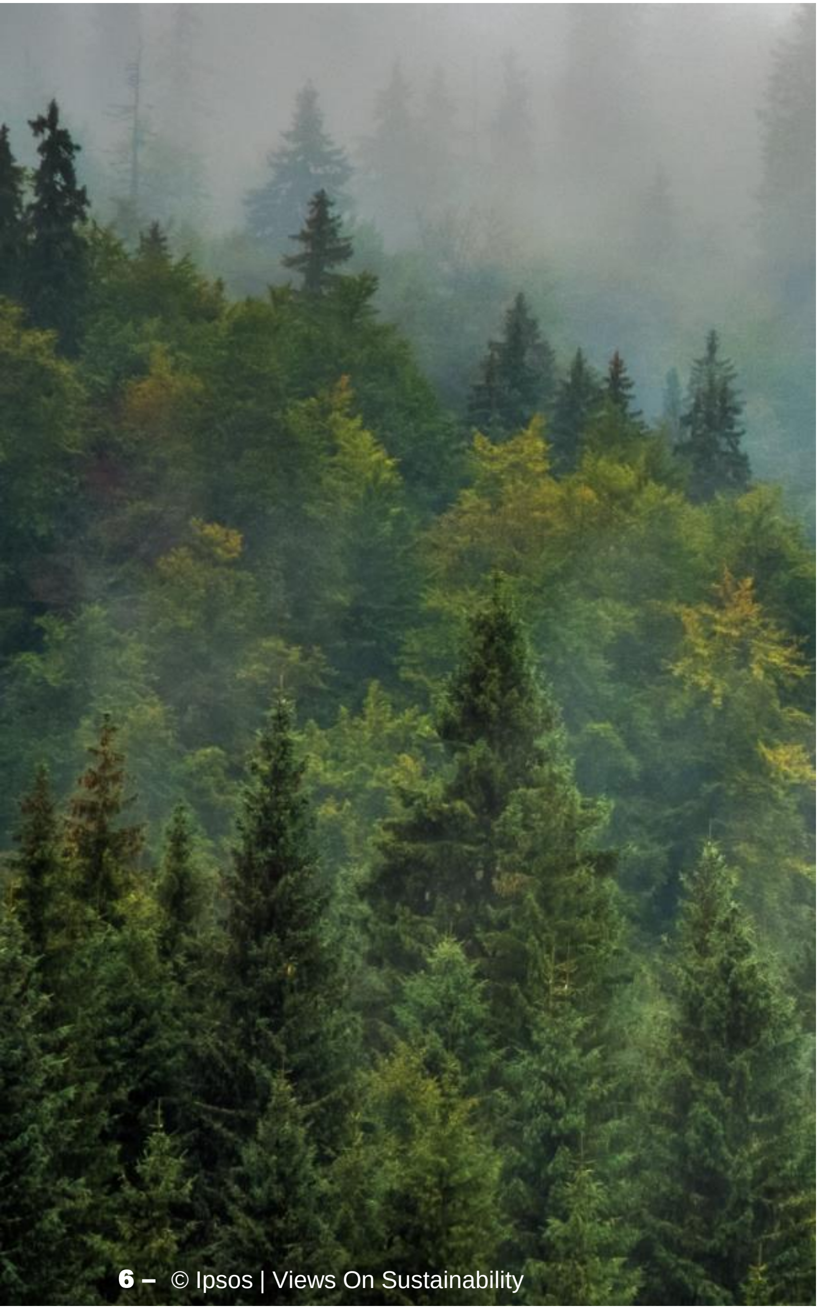
A Brand's Commitment To Ethical Practices Only Affects The Brand Selection Of 1 In 10 People

10%

Prioritize Socially Responsible & Eco-Friendly Brands



Q: What are the three most important criteria that you consider when purchasing/dealing with a brand in Egypt?

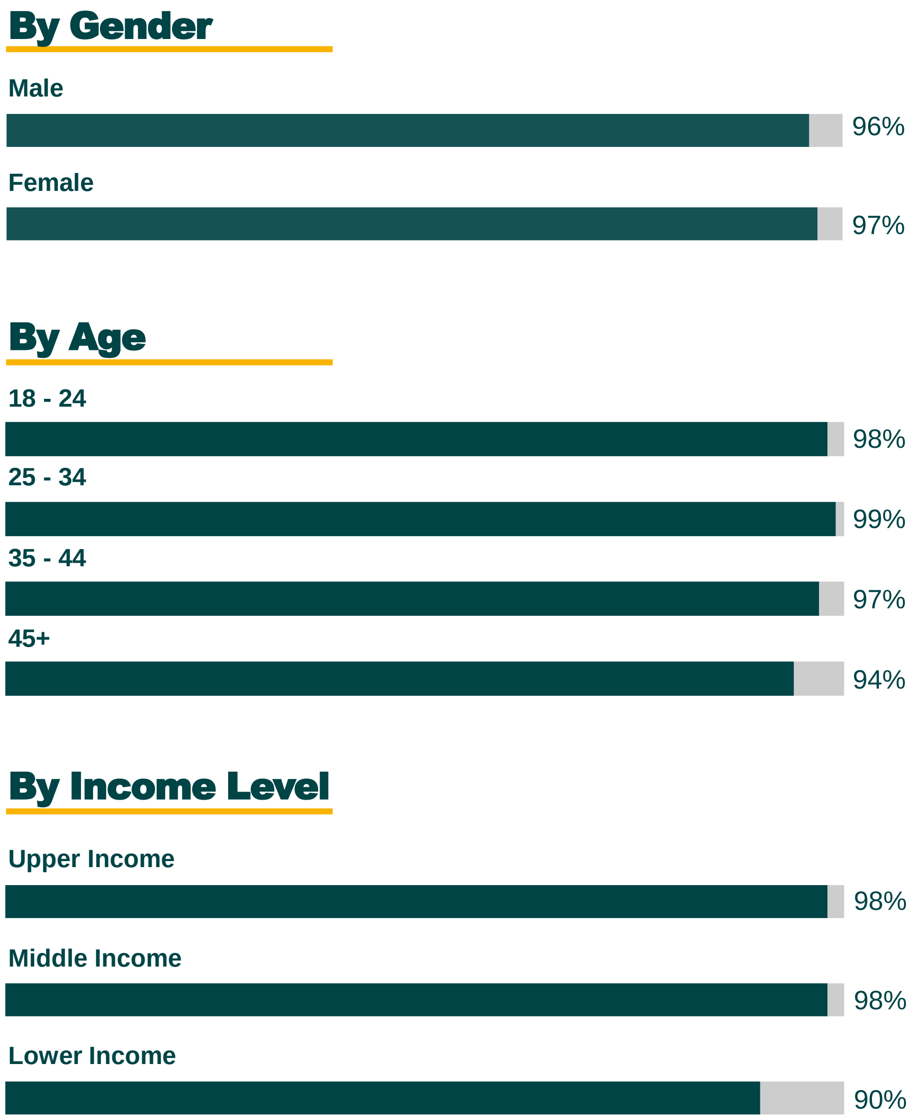


THE PUBLIC'S UNDERSTANDING OF SUSTAINABILITY

The Majority Say That They Are Aware Of The Term Sustainability

97%

Are Aware Of The Term Sustainability



Q: Which of the following comes to mind first when hearing the word "Sustainability"?

Sustainability Is Associated With A Wide Range Of Topics, With Recycling And Water Saving Being The Top Aspects That Come To Mind

Top Topics Associated With Sustainability

22%
Recycling

18%
Water Saving

15%
Natural Resources Conservation

12%
Using Renewable Energy Sources

9%
Reducing Pollution

8%
Ethical Consumption

7%
Nature Preservation

6%
Plastic-Free Products

Q: Which of the following comes to mind first when hearing the word "Sustainability"?

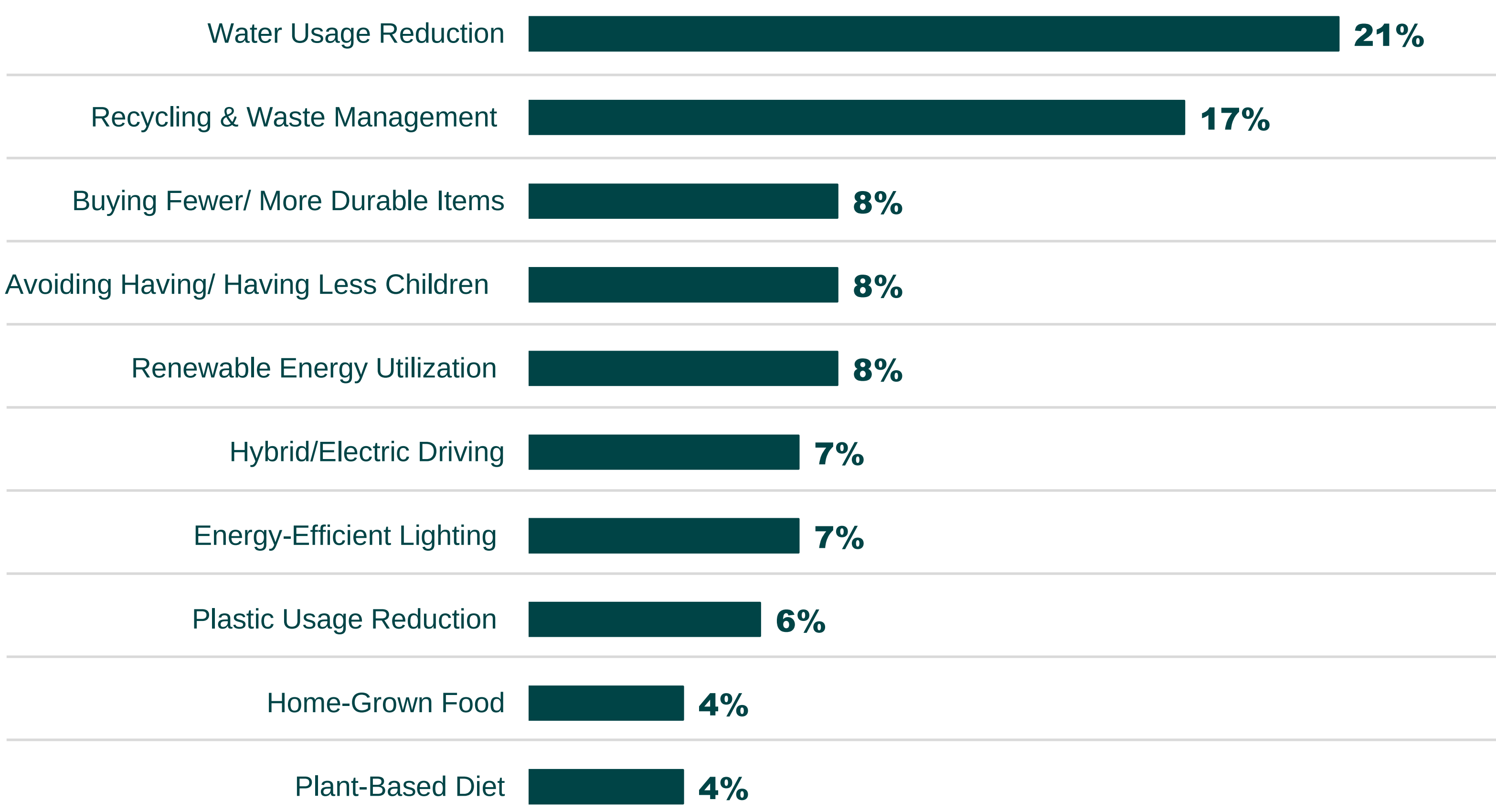
Sustainability Topic Associations By Demographics

	Recycling	Water Saving	Natural Resources Conservation	Using Renewable Energy Sources	Reducing Pollution	Ethical Consumption	Nature Preservation	Plastic-Free Products
	22%	**18%**	**15%**	**12%**	**9%**	**8%**	**7%**	**6%**
Male	22%	19%	16%	11%	7%	7%	7%	5%
Female	22%	17%	14%	13%	11%	9%	6%	6%
18 – 24	20%	17%	12%	14%	12%	9%	9%	6%
25 - 34	26%	14%	19%	7%	9%	12%	5%	7%
35 - 44	23%	21%	14%	19%	4%	6%	8%	4%
45+	20%	20%	16%	10%	10%	7%	6%	5%
Upper Income	22%	14%	17%	16%	5%	9%	8%	6%
Middle Income	24%	18%	14%	11%	11%	8%	7%	5%
Lower Income	13%	21%	20%	11%	7%	10%	2%	7%

Q: Which of the following comes to mind first when hearing the word "Sustainability"?

Nonetheless, People Tend To Undervalue Some Of The Measures That Have The Highest Impact On Sustainability

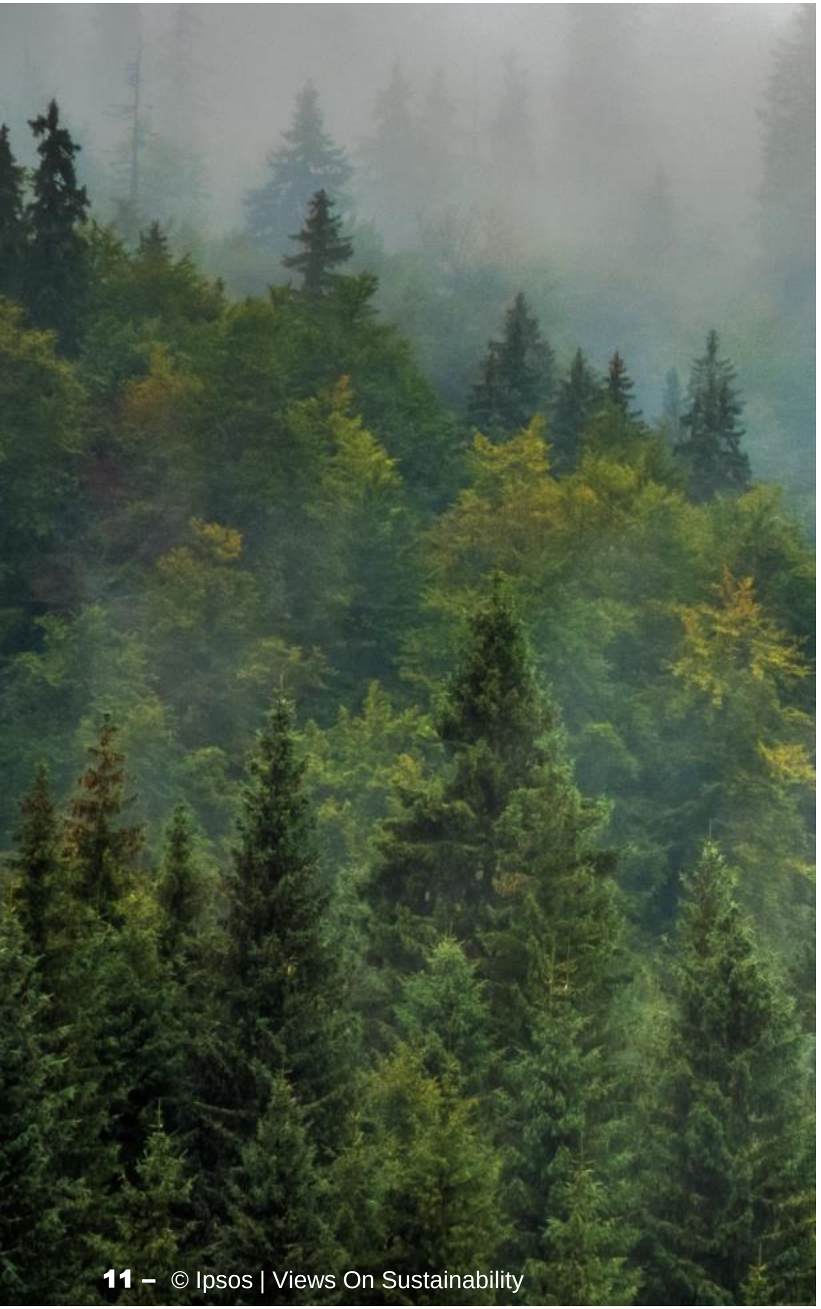
Top 10 Actions Perceived To Have The Most Impact



Top 5 Actual Impact Actions Rank*		Perceived Rank
Avoiding Having/ Having Less Children	1	4
Living Car-Free	2	11
Avoiding Long-Distance Air Travel	3	14
Renewable Energy Utilization	4	5
Hybrid/ Electric Driving	5	6

**Source: Institute Of Physics 2017*

Q: Which of the following actions, do you think would have the most impact on sustainability?

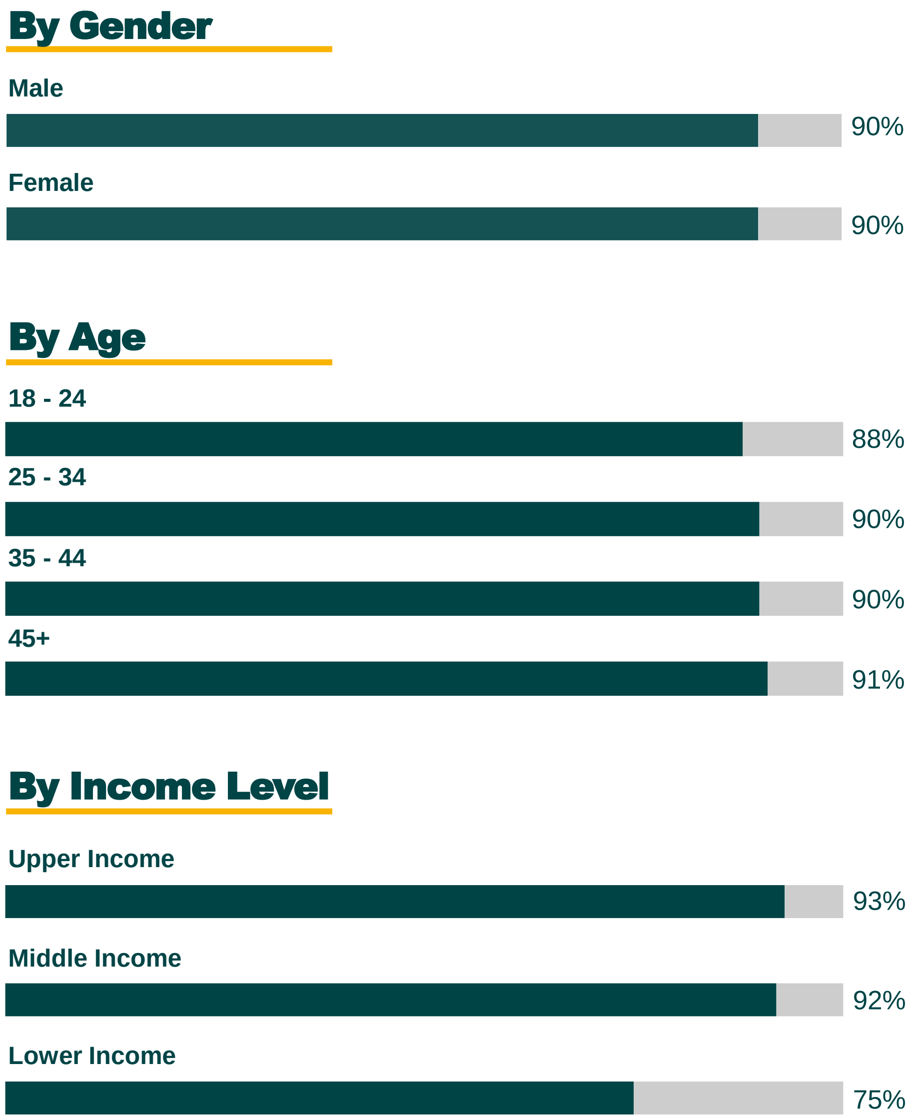


ACTIONS TAKEN TO LIVE MORE SUSTAINABLY

9 In 10 Individuals Have Incorporated Sustainability Actions Into Their Lifestyle In One Way Or Another

90%

Have Taken Steps That Are Linked To A More Sustainable Lifestyle



Q: What steps have you personally taken to live a more sustainable lifestyle?

Sustainability-positive Actions Taken Vary, With A Focus On Easy To Medium Effort Practices Such As Reducing Water Usage, Buying Less Items And Using Low-energy Lights Bulbs

Sustainability Actions Taken

39%
Reduce Water Usage

34%
Consciously Buy Fewer Items

28%
Use Low-Energy Lightbulbs

22%
Recycle & Manage Waste

17%
Walk More For Transportation

17%
Eat Less Meat/ Have A Plant-Based Diet

11%
Avoid Having/Have Less Children

10%
Buy/ Use Products With Less Plastic

5%
Grow Their Own Food

5%
Drive Hybrid/ Electric Cars

4%
Avoid Long-Distance Air Travel

3%
Switched To Renewable Electricity

Q: What steps have you personally taken to live a more sustainable lifestyle?

People Would Be Motivated To Live A More Sustainable Lifestyle If Others Around Them Apply Sustainable Practices And If They Were More Aware Of These Practices

Motivators For Sustainable Living

38%
If Sustainable Practices Are Also Applied by Others

37%
Being More Aware Of Sustainable Practices Implementation

32%
If Sustainable Practices Are Convenient

31%
If There's An Economic Incentive

27%
If Sustainable Practices Don't Have An Extra Cost

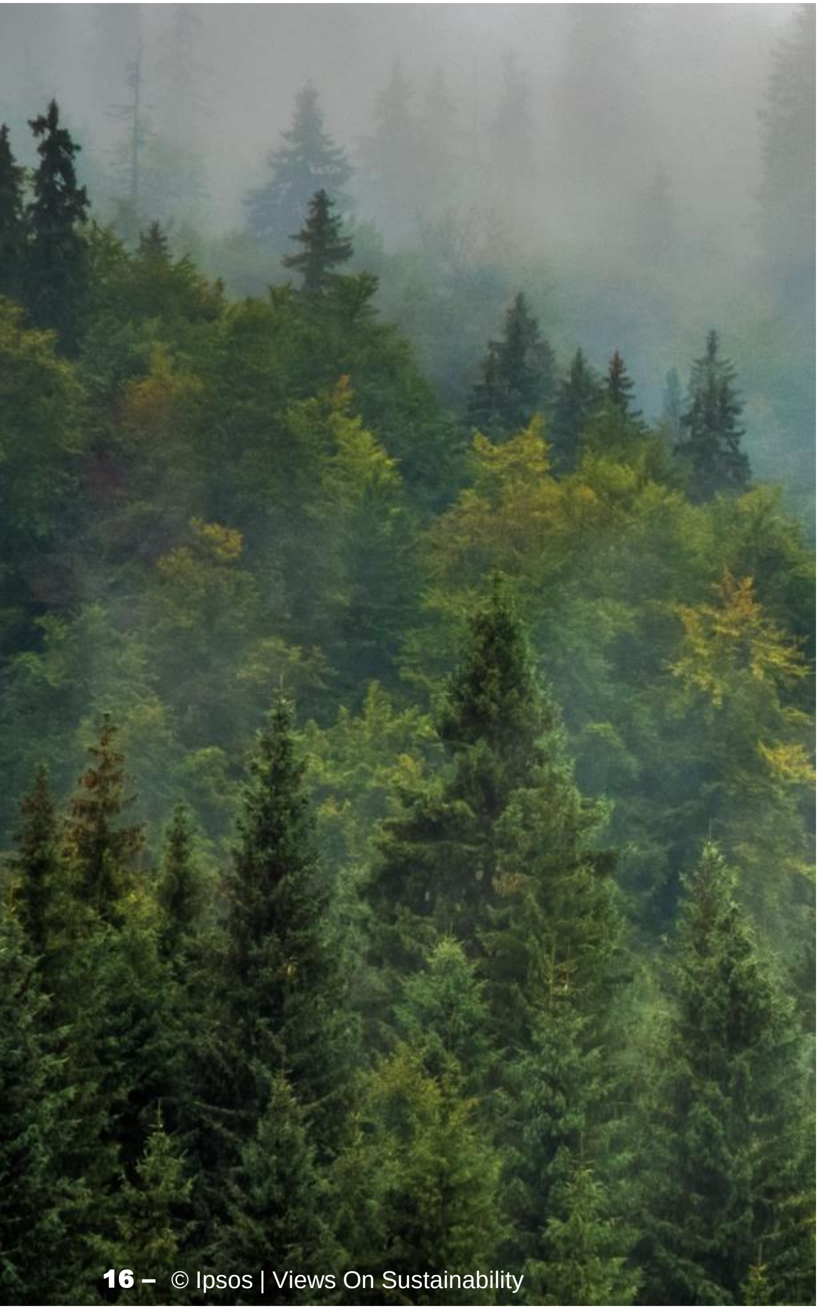
21%
If The Law Requires It

Q: What would encourage you the most to live a more sustainable lifestyle, and incorporate sustainable practices into your daily routine?

Motivators For Sustainable Living By Demographics

	If Sustainable Practices Are Also Applied by Others	Being More Aware Of Sustainable Practices Implementation	If Sustainable Practices Are Convenient	If There's An Economic Incentive	If Sustainable Practices Don't Have An Extra Cost	If The Law Requires It
	38%	**37%**	**32%**	**31%**	**27%**	**21%**
Male	38%	35%	29%	30%	28%	27%
Female	37%	38%	36%	32%	25%	16%
18 – 24	39%	38%	40%	32%	30%	26%
25 - 34	40%	34%	29%	31%	23%	19%
35 - 44	39%	36%	27%	36%	28%	15%
45+	34%	39%	32%	27%	27%	25%
Upper Income	39%	35%	38%	29%	24%	25%
Middle Income	39%	38%	31%	32%	29%	21%
Lower Income	28%	34%	30%	26%	21%	18%

Q: What would encourage you the most to live a more sustainable lifestyle, and incorporate sustainable practices into your daily routine?



SUSTAINABILITY RESPONSIBILITY & INDUSTRY PERCEPTIONS

8 In 10 Individuals Think Governments Should Take On The Financial Responsibility For Supporting Sustainable Practices

82%

Governments

13%

Businesses

5%

Consumers

Q: In your opinion, who should bear the cost of sustainability practices?

People Believe That The Most Sustainably Responsible Sectors Are Household Goods Manufacturers

Industries People Think Are Most Active On Sustainability

38%
Household Goods Manufacturers

32%
Technology Companies

32%
Airlines

32%
Automotive Manufacturers

30%
Hospitality

30%
Oil & Gas Companies

29%
E-commerce Companies

27%
Clothing & Fashion Brands

24%
Public Transport Providers

22%
Financial Service Providers

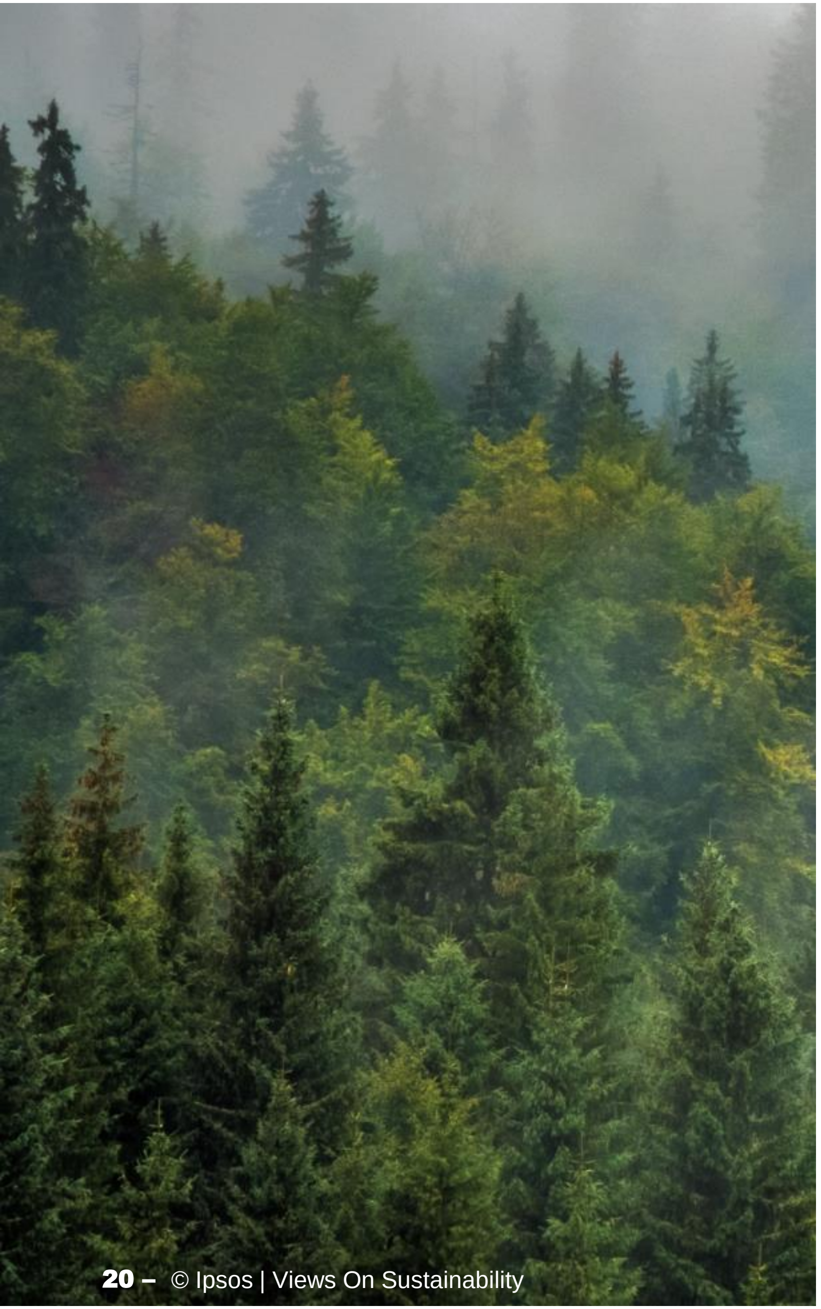
Q: When thinking about each of the sectors below, which do you consider to be the most responsible in terms of positively benefiting the environment through sustainable practices?

2 out of The Top 10 Brands Most Associated With Sustainability Practices Are Local With Elaraby Ranking In 2nd Place

Top 10 Brands Associated With Sustainable Practices

1. BMW
2. ELARABY
3. Nestlé
4.
5.
6. Coca-Cola
7. ZARA
8. Juhayna
9. LG
10. TOYOTA

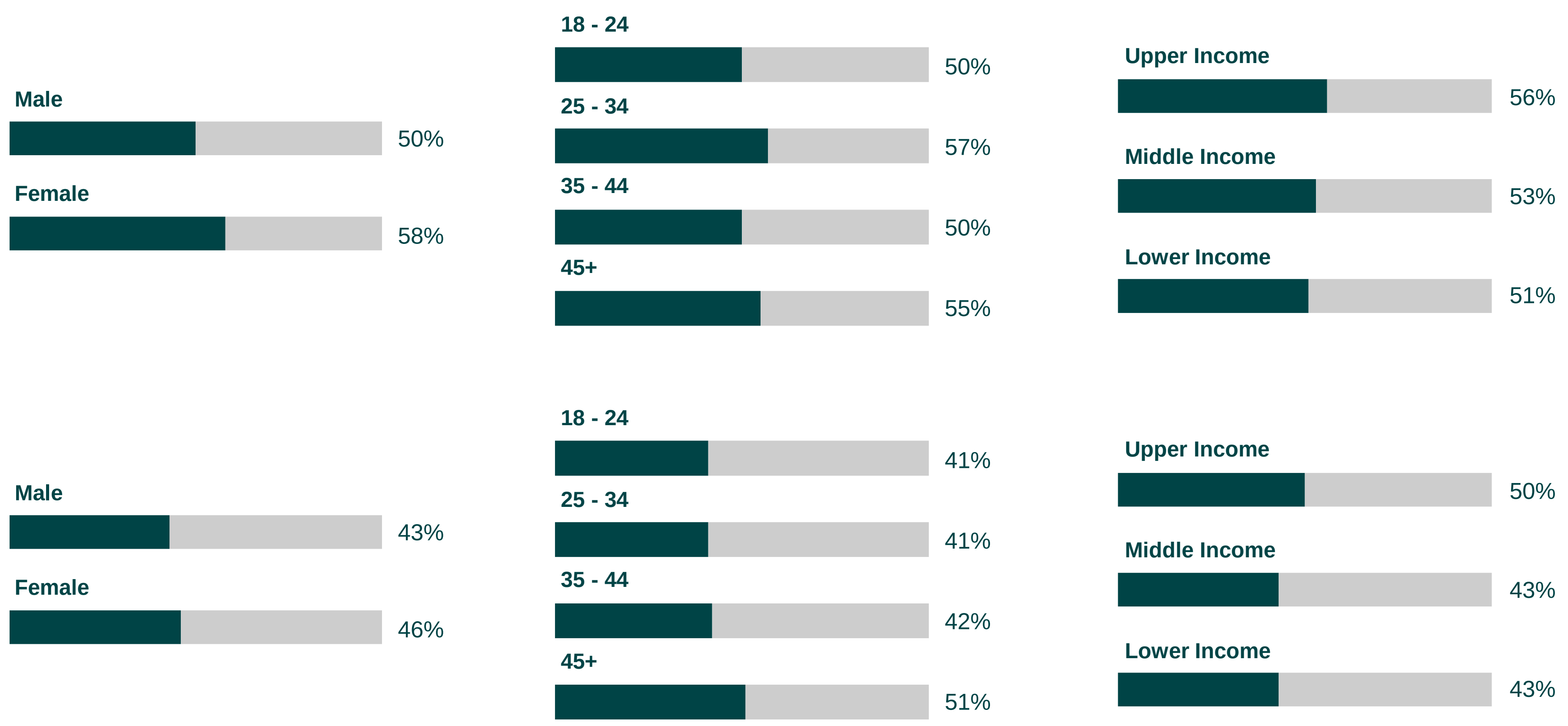
Q: Which companies or brands do you think are the most committed to and concerned with sustainable practices?



ATTITUDES TOWARDS SUSTAINABILITY

Economic Prioritization And Skepticism

By Gender **By Age** **By Income Level**



54%

Believe That The Economy Should Be Prioritized Even If It Means Compromising The Environment

44%

Don't Believe That Climate Change Is As Serious An Issue As It Is Made Out To Be

Q: To what extent do you agree or disagree with the following statements?

Corporate Accountability And Consumerism

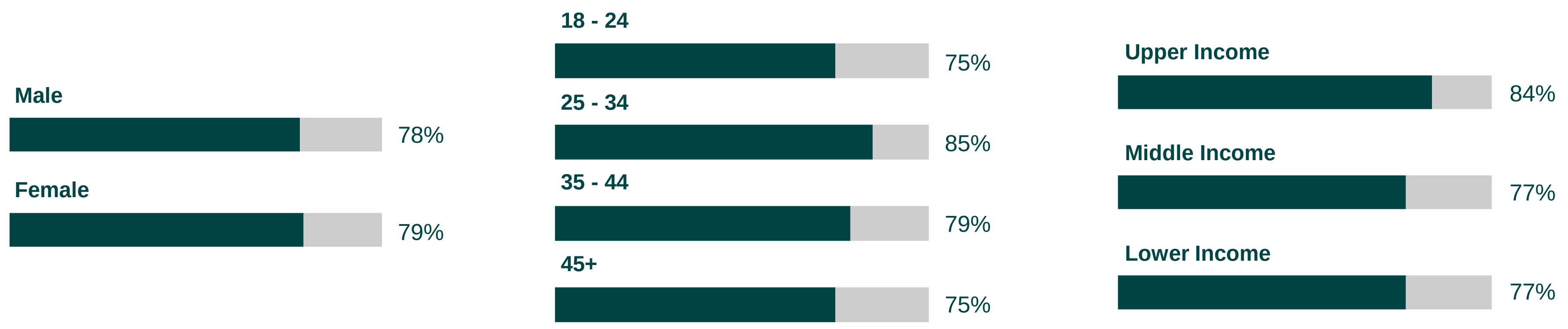
By Gender

By Age

By Income Level

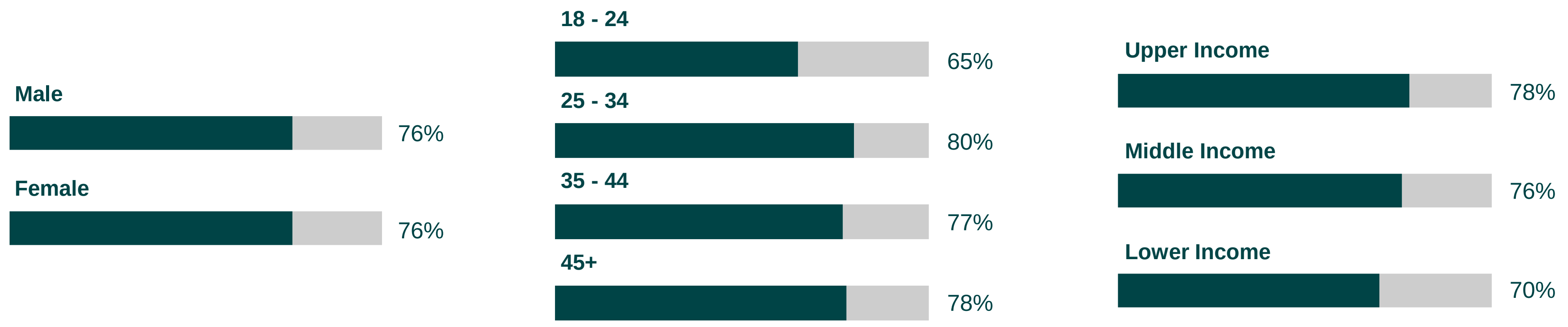
79%

Believe That Companies In Egypt Lack In Terms Of Supporting Sustainability And Ethical Best Practices



76%

Consider Themselves To Be Sustainable/Ethical Consumers



Q: To what extent do you agree or disagree with the following statements?

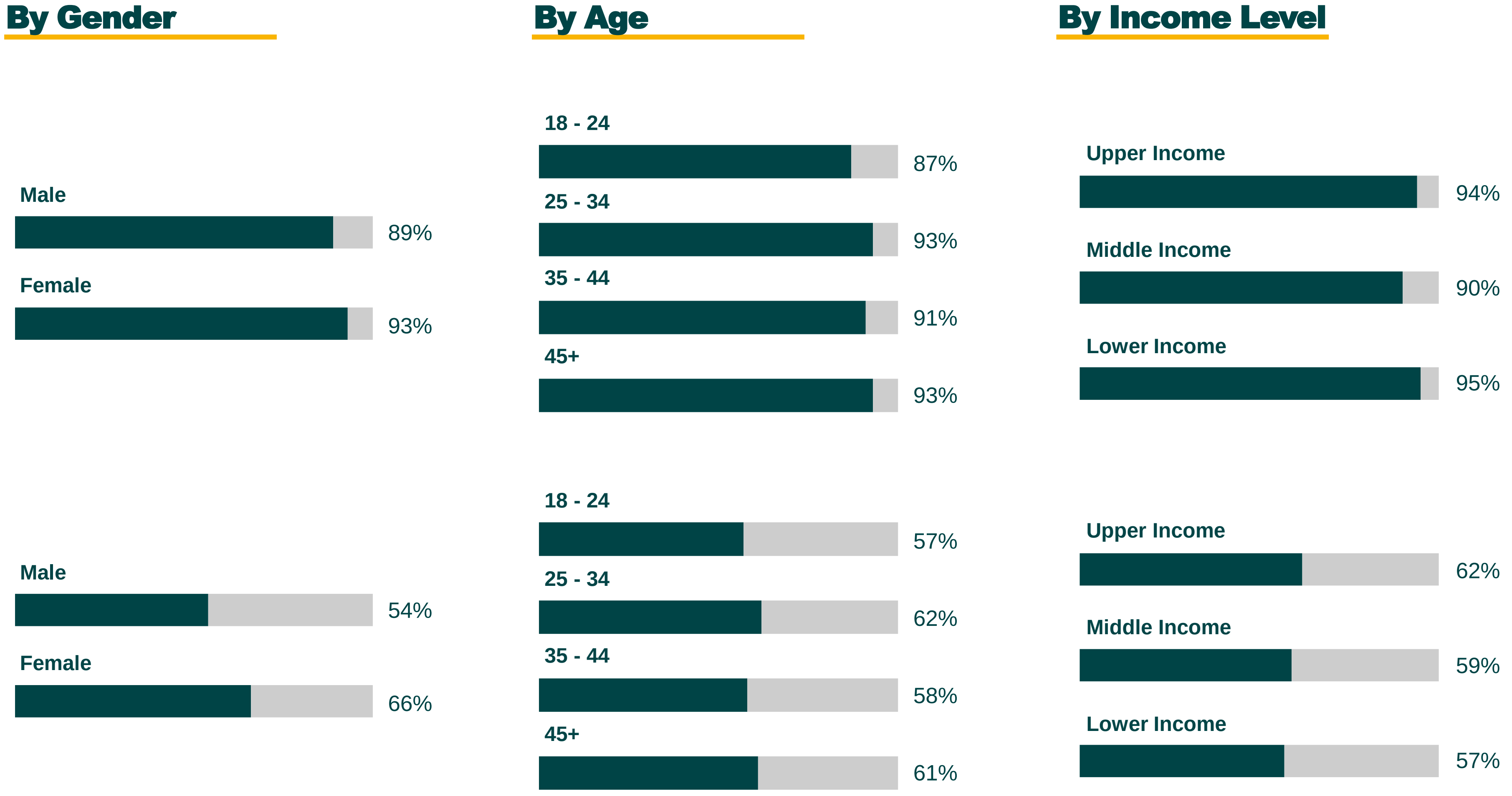
Personal Commitment And Actions

91%

Are Prepared To Make Lifestyle Compromises To Benefit The Environment

60%

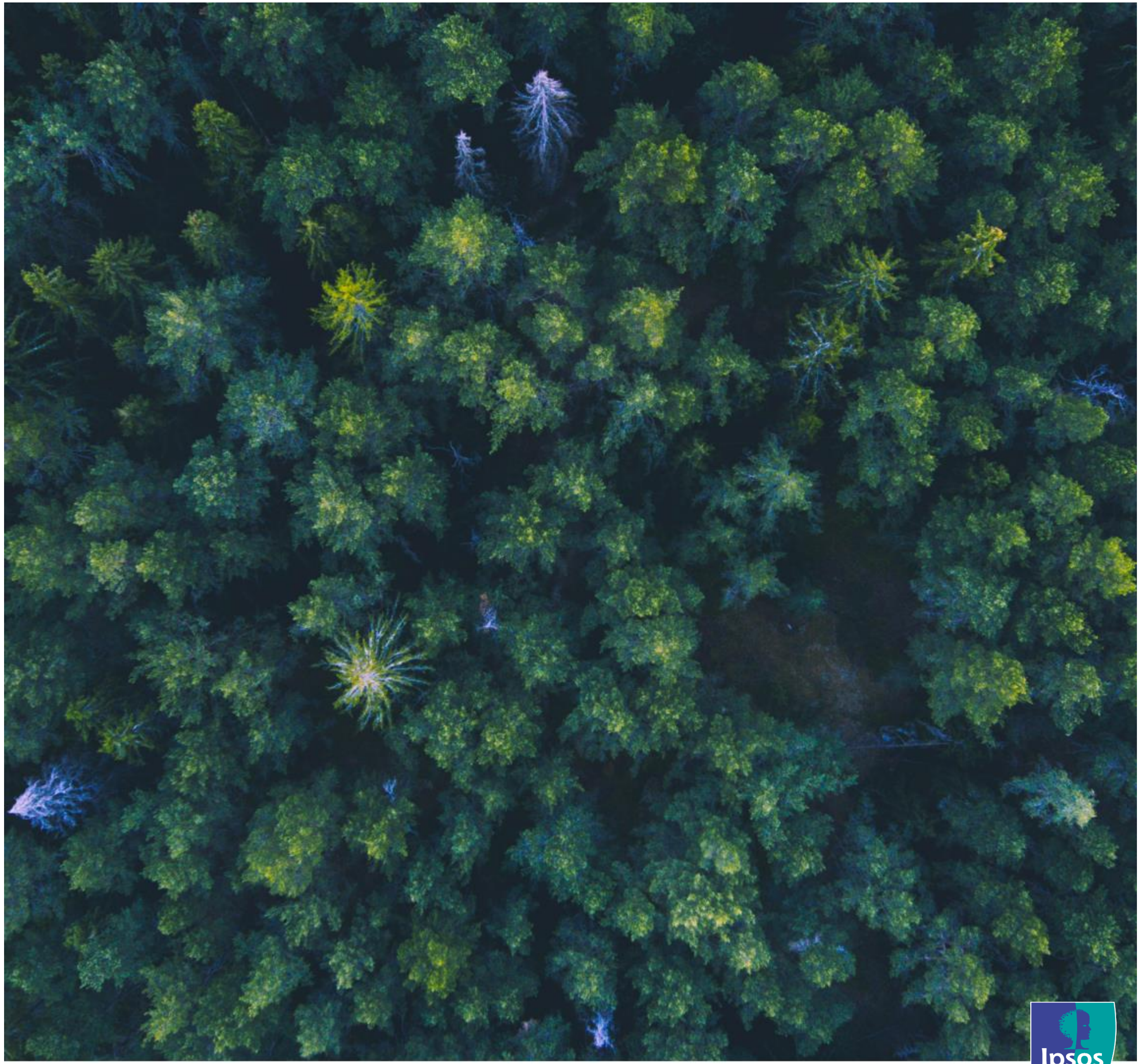
Are Not Sure What They Can Do To Make A Difference When It Comes To Climate Change



Q: To what extent do you agree or disagree with the following statements?

METHODOLOGICAL NOTES

- 500 Computer-Aided Telephone Interviews
- Nationally Representative
- Males & Females
- 18 Years & Above
- Nationwide Coverage



FOR MORE INFORMATION:

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GAME CHANGERS