

# VIEWS ON SUSTAINABILITY IN MENA

**August 2023**

**GAME CHANGERS**



# Report Overview

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**HOW CONCERNED  
ARE PEOPLE ABOUT  
ENVIRONMENTAL  
ISSUES?**

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**THE PUBLIC'S  
UNDERSTANDING  
OF SUSTAINABILITY**

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**ACTIONS TAKEN  
TO LIVE MORE  
SUSTAINABLY**

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**SUSTAINABILITY  
RESPONSIBILITY  
& INDUSTRY  
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**ATTITUDES  
TOWARDS  
SUSTAINABILITY**



# HOW CONCERNED ARE PEOPLE ABOUT ENVIRONMENTAL ISSUES?

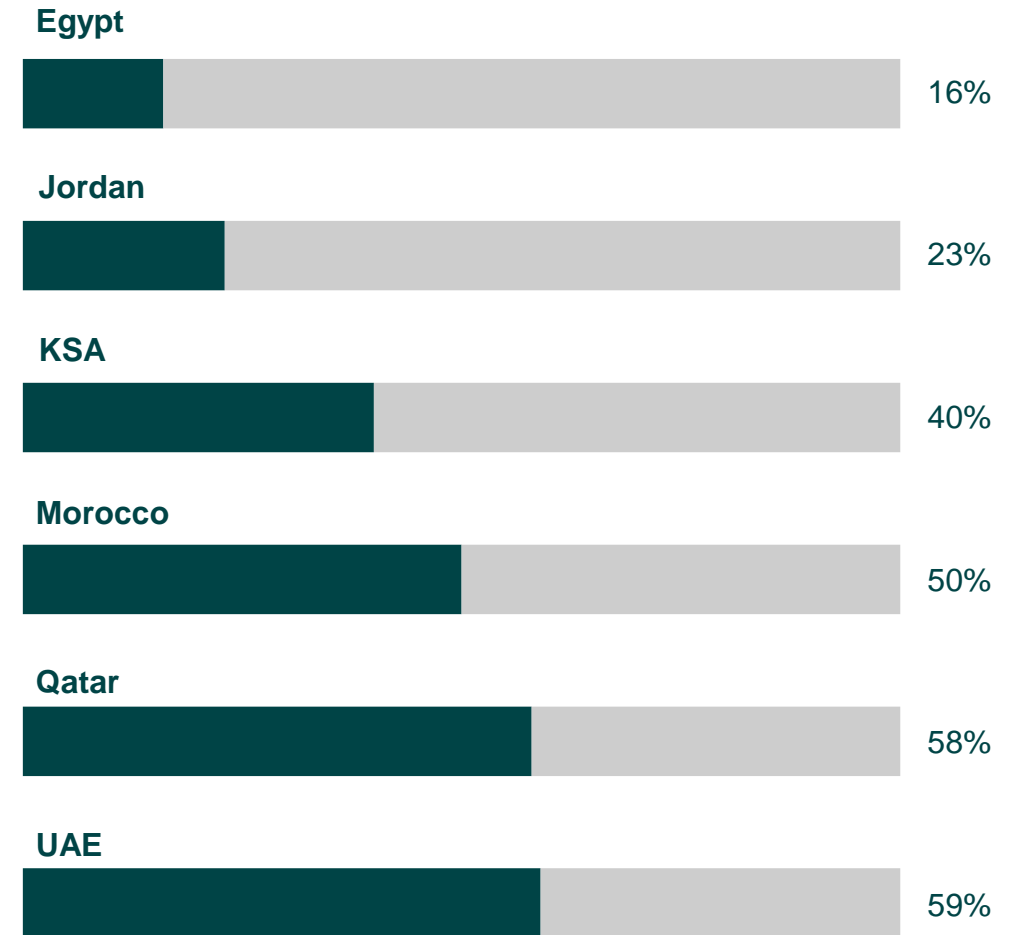
# 2 in 5 Individuals Recognize Environmental Issues As A Primary Global Concern



# 41%

## Have Concerns About The Environment

### By Country



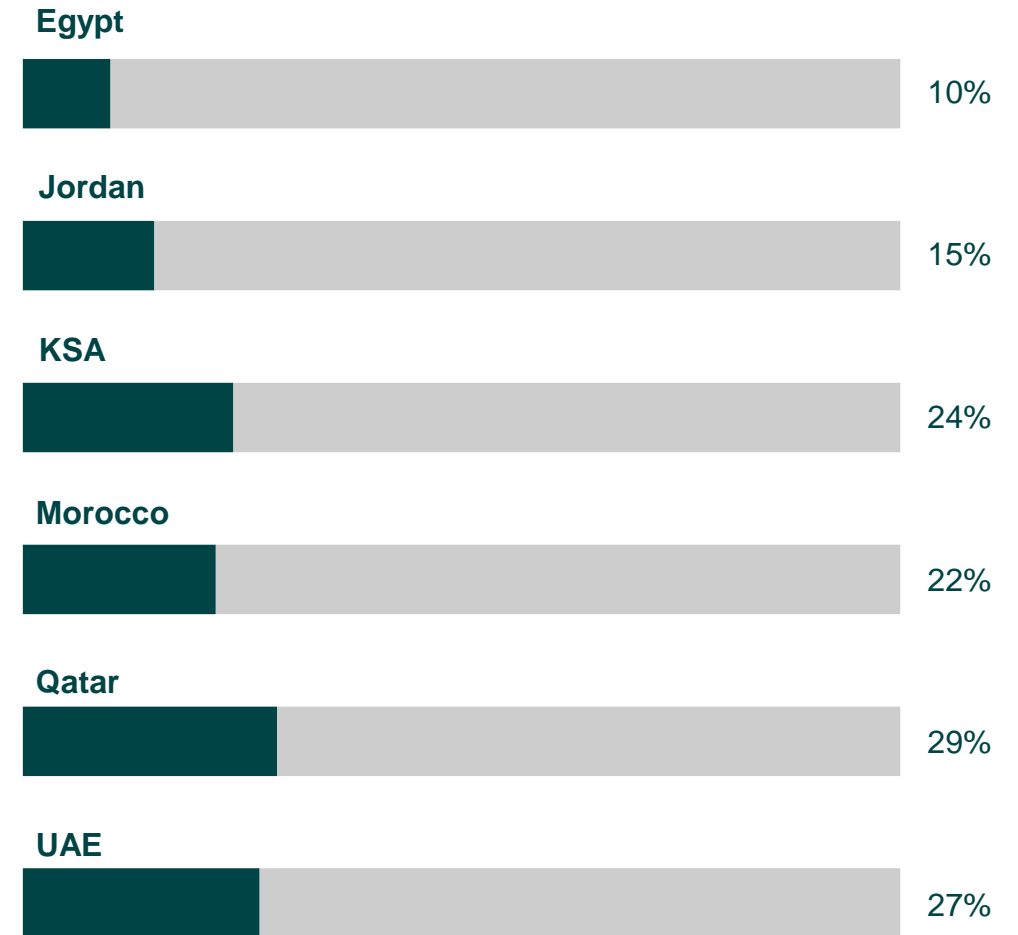
# However, A Brand's Commitment To Sustainable Practices Only Affects The Brand Selection Of 1 In 5 People



# 21%

## Prioritize Socially Responsible & Eco-Friendly Brands

### By Country





# THE PUBLIC'S UNDERSTANDING OF SUSTAINABILITY

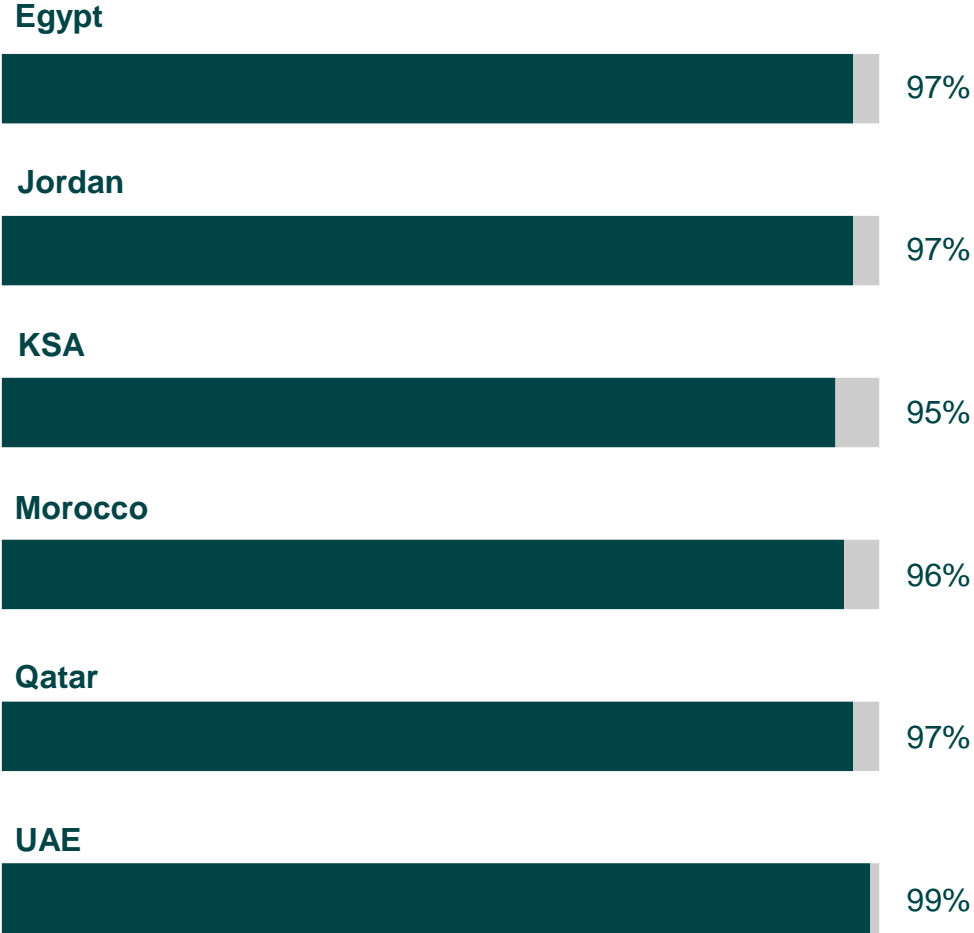
# The Vast Majority Say That They Are Aware Of The Term Sustainability



97%

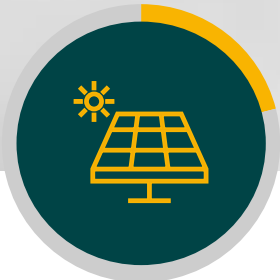
Are Aware Of The Term Sustainability

## By Country



# Sustainability Is Linked To Many Topics, Where Renewable Energy Sources And Natural Resources Conservation Are The First Aspects That Come To Mind

## Top Topics Associated With Sustainability



**21%**

Using Renewable Energy Sources



**18%**

Natural Resources Conservation



**15%**

Recycling



**12%**

Ethical Consumption



**9%**

Nature Preservation



**9%**

Water Saving



**8%**

Reducing Pollution



**5%**

Plastic-Free Products



# Sustainability Topic Associations By Country



Using Renewable Energy Sources

**21%**



Natural Resources Conservation

**18%**



Recycling

**15%**



Ethical Consumption

**12%**



Nature Preservation

**9%**



Water Saving

**9%**



Reducing Pollution

**8%**



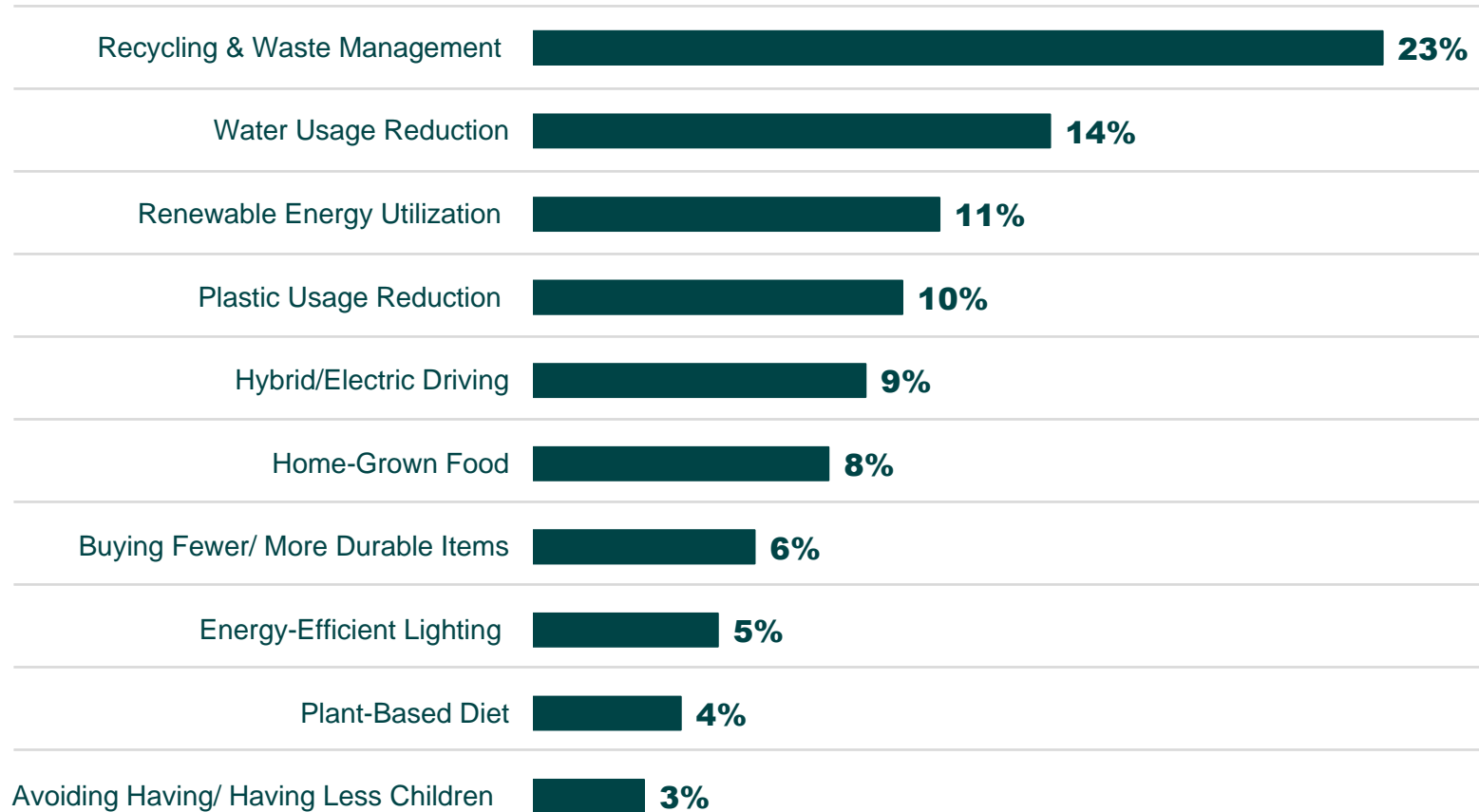
Plastic-Free Products

**5%**

	Using Renewable Energy Sources	Natural Resources Conservation	Recycling	Ethical Consumption	Nature Preservation	Water Saving	Reducing Pollution	Plastic-Free Products
<b>Egypt</b>	12%	15%	22%	8%	7%	18%	9%	6%
<b>Jordan</b>	32%	21%	12%	10%	9%	4%	4%	2%
<b>KSA</b>	20%	21%	10%	14%	11%	7%	7%	5%
<b>Morocco</b>	17%	23%	10%	14%	8%	12%	9%	3%
<b>Qatar</b>	23%	13%	19%	14%	8%	6%	7%	6%
<b>UAE</b>	20%	13%	14%	12%	13%	5%	14%	8%

# However, People Have A Misguided Assessment 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

Action	Actual Rank	Perceived Rank
Avoiding Having/ Having Less Children	1	10
Living Car-Free	2	12
Avoiding Long-Distance Air Travel	3	14
Renewable Energy Utilization	4	3
Hybrid/ Electric Driving	5	5



# **ACTIONS TAKEN TO LIVE MORE SUSTAINABLY**

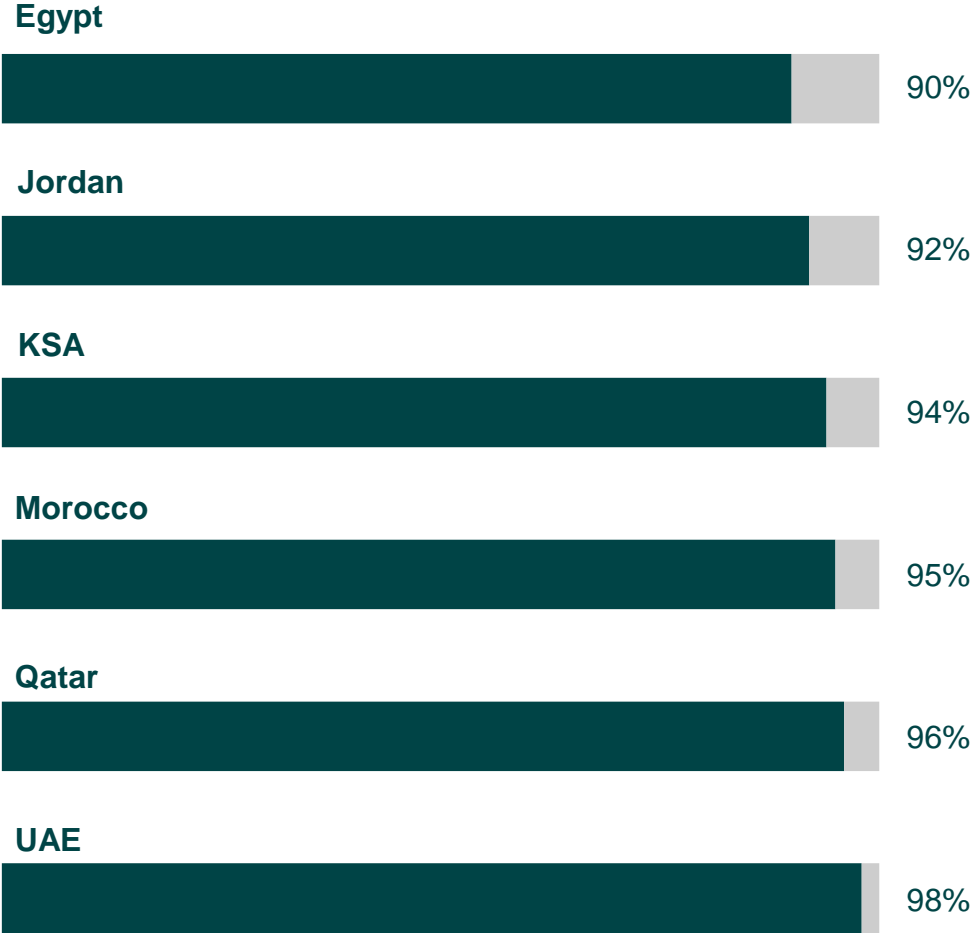
# The Majority Have Incorporated Sustainability Practices Into Their Lifestyle In One Way Or Another



# 94%

Have Taken Steps That Are Linked To A More Sustainable Lifestyle

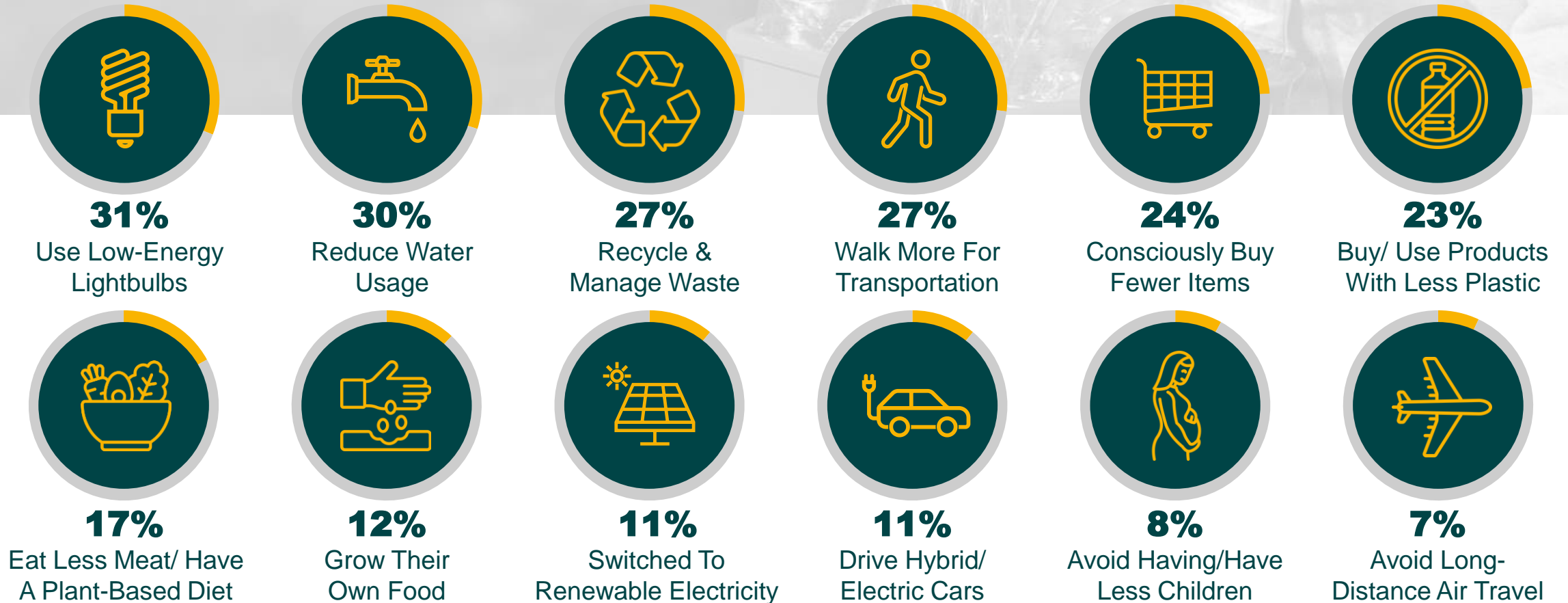
## By Country



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

# People Implement Diverse Sustainability-positive Actions, Prioritizing Easy To Medium Effort Practices Like Using Low-energy Lightbulbs And Reducing Water Usage

## Sustainability Actions Taken



# Sustainability Actions Taken By Country



Using Low-Energy Lightbulbs

**31%**



Reduce Water Usage

**30%**



Recycle & Manage Waste

**27%**



Walk More For Transportation

**27%**



Consciously Buy Fewer Items

**24%**



Buy/ Use Products With Less Plastic

**23%**



Eat Less Meat/ Have A Plant-Based Diet

**17%**



Grow Their Own Food

**12%**

	Using Low-Energy Lightbulbs	Reduce Water Usage	Recycle & Manage Waste	Walk More For Transportation	Consciously Buy Fewer Items	Buy/ Use Products With Less Plastic	Eat Less Meat/ Have A Plant-Based Diet	Grow Their Own Food
<b>Egypt</b>	28%	39%	22%	17%	34%	10%	17%	5%
<b>Jordan</b>	32%	25%	22%	27%	24%	15%	15%	12%
<b>KSA</b>	30%	21%	27%	29%	19%	22%	17%	15%
<b>Morocco</b>	35%	40%	17%	34%	24%	26%	22%	8%
<b>Qatar</b>	32%	26%	38%	26%	21%	31%	13%	14%
<b>UAE</b>	30%	31%	35%	30%	24%	34%	19%	18%

# People Would Be Motivated To Live A More Sustainable Lifestyle If They Were More Aware Of Sustainable Practices, And If Such Practices Are Also Convenient

## Motivators For Sustainable Living



**43%**

Being More Aware Of Sustainable Practices Implementation



**37%**

If Sustainable Practices Are Convenient



**37%**

If Sustainable Practices Are Also Applied by Others



**35%**

If Sustainable Practices Don't Have An Extra Cost



**34%**

If There's An Economic Incentive



**24%**

If The Law Requires It

# Motivators For Sustainable Living By Country



Being More Aware Of Sustainable Practices Implementation

**43%**



If Sustainable Practices Are Convenient

**37%**



If Sustainable Practices Are Also Applied by Others

**37%**



If Sustainable Practices Don't Have An Extra Cost

**35%**



If There's An Economic Incentive

**34%**



If The Law Requires It

**24%**

	Being More Aware Of Sustainable Practices Implementation	If Sustainable Practices Are Convenient	If Sustainable Practices Are Also Applied by Others	If Sustainable Practices Don't Have An Extra Cost	If There's An Economic Incentive	If The Law Requires It
<b>Egypt</b>	37%	32%	38%	27%	31%	21%
<b>Jordan</b>	43%	39%	34%	39%	40%	18%
<b>KSA</b>	41%	40%	37%	35%	33%	25%
<b>Morocco</b>	52%	31%	39%	41%	23%	22%
<b>Qatar</b>	42%	39%	40%	32%	38%	26%
<b>UAE</b>	40%	41%	31%	35%	36%	31%





# **SUSTAINABILITY RESPONSIBILITY & INDUSTRY PERCEPTIONS**

# 3 In 5 Think Governments Should Bear The Cost Of Sustainable Practices, While 1 In 5 Believe It Should Be Businesses, And About 1 In 7 Are Open To Covering Such Costs Themselves



**64%**

Governments



**21%**

Businesses



**15%**

Consumers

# Who People Think Should Bear The Cost Of Sustainable Practices By Country



Governments

**64%**



Businesses

**21%**



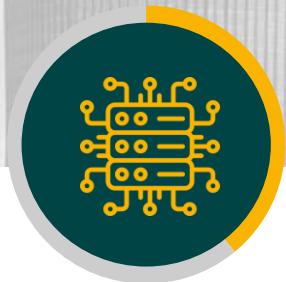
Consumers

**15%**

	<b>64%</b>	<b>21%</b>	<b>15%</b>
<b>Egypt</b>	82%	13%	5%
<b>Jordan</b>	81%	12%	7%
<b>KSA</b>	46%	29%	25%
<b>Morocco</b>	63%	20%	17%
<b>Qatar</b>	60%	25%	15%
<b>UAE</b>	49%	26%	25%

# The Sectors Perceived To Be Most Sustainably Responsible Are Technology Companies, Fashion Brands And Household Goods Manufacturers

Industries People Think Are Most Active On Sustainability



**39%**

Technology Companies



**35%**

Clothing & Fashion Brands



**33%**

Household Goods Manufacturers



**31%**

Hospitality



**30%**

E-commerce Companies



**30%**

Oil & Gas Companies



**28%**

Automotive Manufacturers



**27%**

Airlines



**25%**

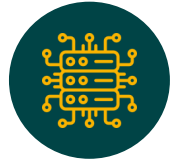
Public Transport Providers



**22%**

Financial Service Providers

# Industries People Think Are Most Active On Sustainability By Country



Technology Companies

Clothing & Fashion Brands

Household Goods Manufacturers

Hospitality

E-commerce Companies

Oil & Gas Companies

Automotive Manufacturers

Airlines

Public Transport Providers

Financial Service Providers

**39%**

**35%**

**33%**

**31%**

**30%**

**30%**

**28%**

**27%**

**25%**

**22%**

**Egypt**

32%

27%

38%

30%

29%

30%

32%

32%

24%

22%

**Jordan**

49%

44%

31%

28%

30%

21%

34%

22%

17%

24%

**KSA**

41%

36%

29%

27%

29%

37%

25%

36%

18%

21%

**Morocco**

47%

37%

32%

30%

36%

19%

28%

18%

24%

28%

**Qatar**

27%

34%

39%

36%

25%

37%

26%

26%

35%

16%

**UAE**

38%

33%

30%

37%

28%

33%

25%

27%

30%


19%



# ATTITUDES TOWARDS SUSTAINABILITY

# Economic Prioritization And Skepticism

**52%**



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

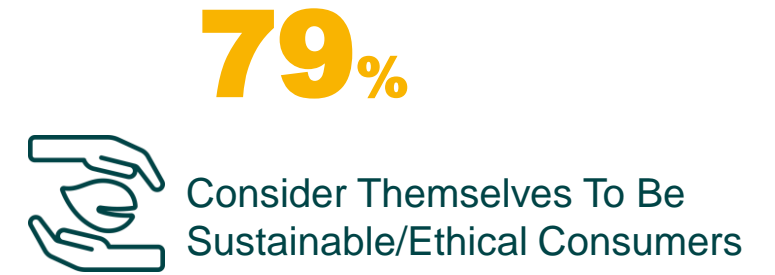
**40%**



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

<b>Egypt</b>	54%	44%
<b>Jordan</b>	45%	38%
<b>KSA</b>	60%	50%
<b>Morocco</b>	43%	34%
<b>Qatar</b>	48%	29%
<b>UAE</b>	62%	46%

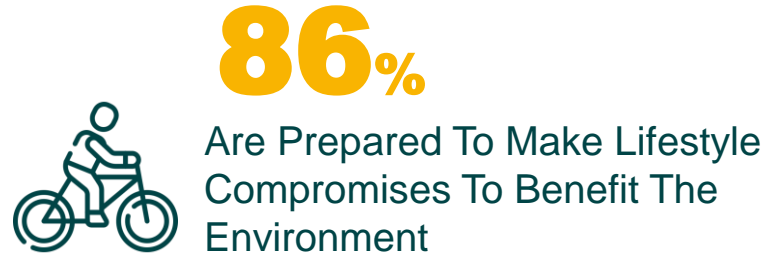
# Corporate Accountability And Consumerism



<b>Egypt</b>	79%	76%
<b>Jordan</b>	80%	76%
<b>KSA</b>	56%	75%
<b>Morocco</b>	72%	82%
<b>Qatar</b>	48%	85%
<b>UAE</b>	54%	81%



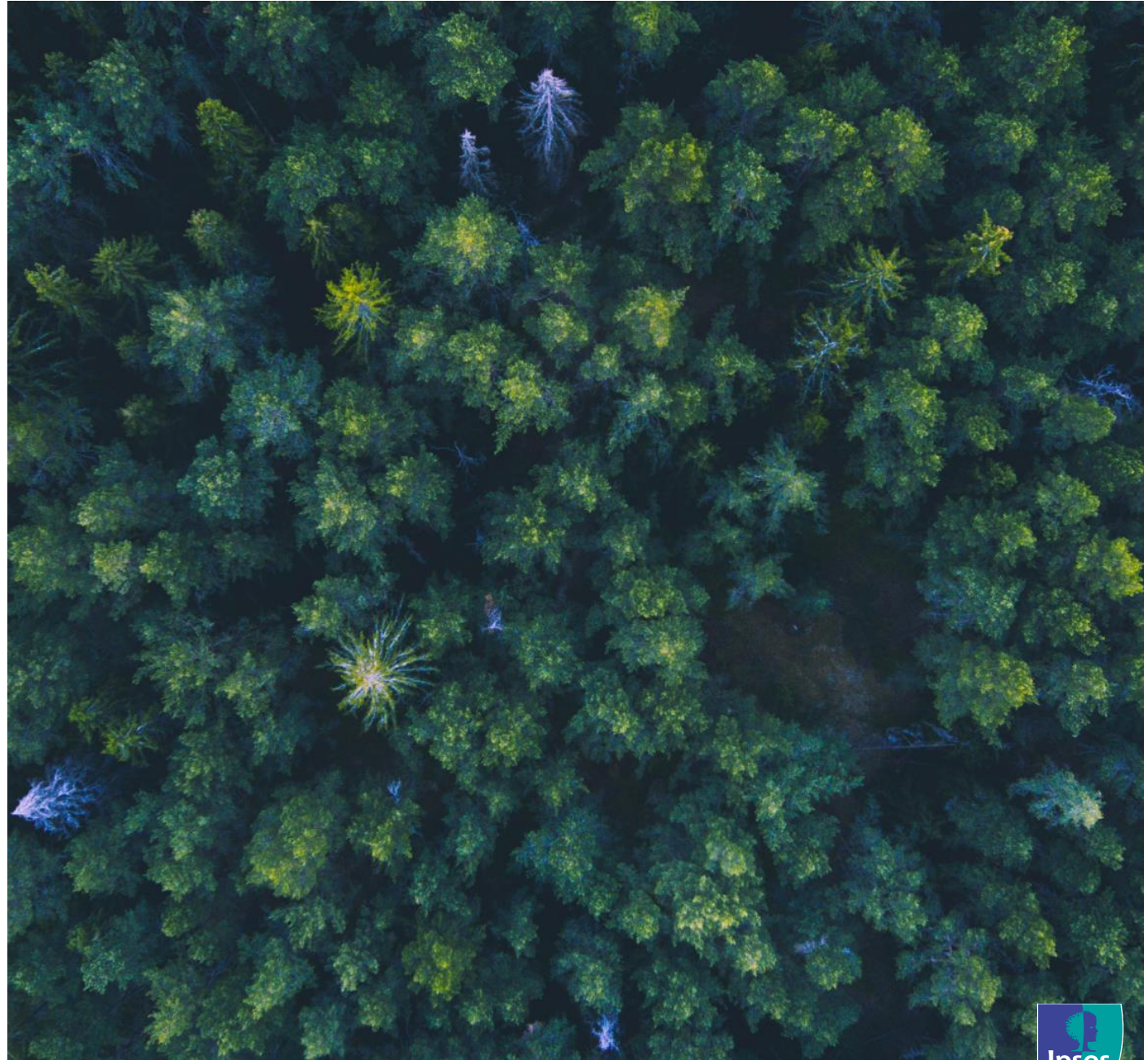
# Personal Commitment And Actions



<b>Egypt</b>	91%	60%
<b>Jordan</b>	88%	54%
<b>KSA</b>	77%	63%
<b>Morocco</b>	86%	58%
<b>Qatar</b>	89%	48%
<b>UAE</b>	82%	57%

# METHODOLOGICAL NOTES

- 3000 Interviews (500 per country)
- Online/ Telephone Interviews
- 6 Countries In MENA:  
Egypt, Jordan, KSA, Morocco, Qatar & UAE
- Nationally Representative
- Males & Females
- 18 Years & Above
- Nationwide Coverage



# FOR MORE INFORMATION:

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**GAME CHANGERS**

