

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
PERCEPTIONS**

5

**ATTITUDES
TOWARDS
SUSTAINABILITY**



HOW CONCERNED ARE PEOPLE ABOUT ENVIRONMENTAL ISSUES?

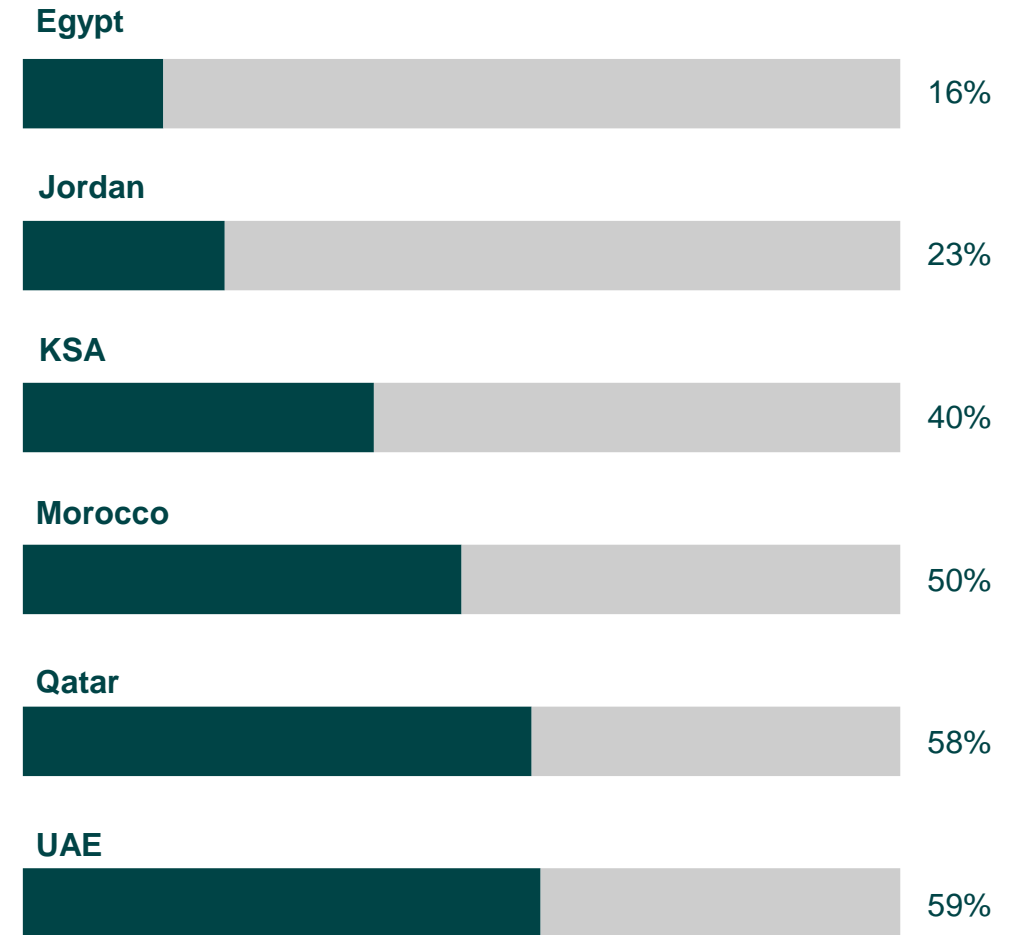
2 in 5 Individuals Recognize Environmental Issues As A Primary Global Concern



41%

Have Concerns About The Environment

By Country



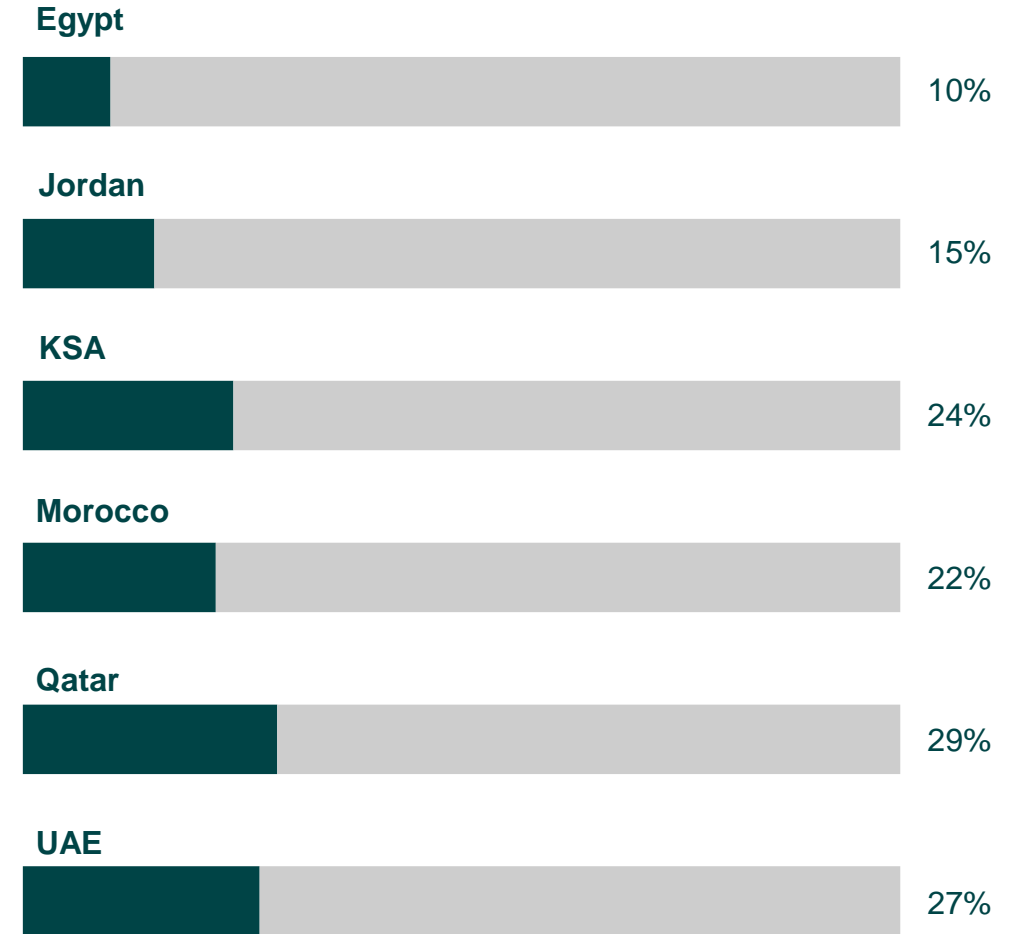
However, A Brand's Commitment To Sustainable Practices Only Affects The Brand Selection Of 1 In 5 People



21%

Prioritize Socially Responsible & Eco-Friendly Brands

By Country





THE PUBLIC'S UNDERSTANDING OF SUSTAINABILITY

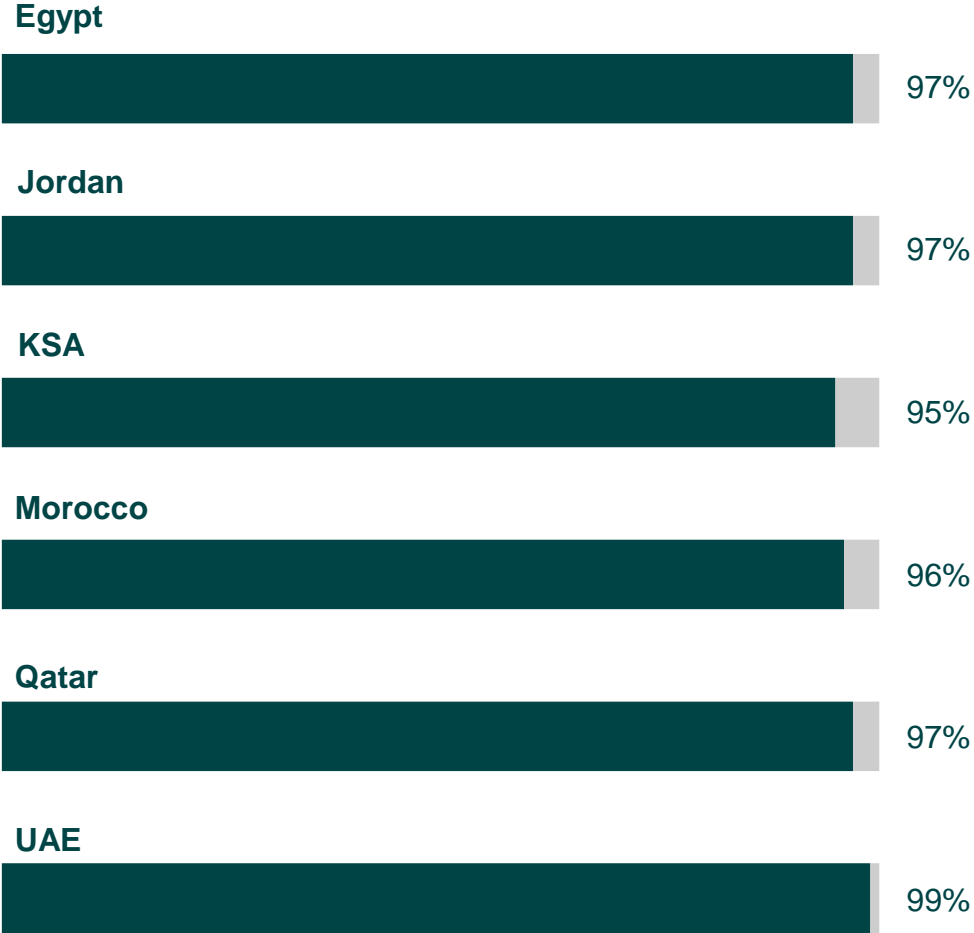
The Vast Majority Say That They Are Aware Of The Term Sustainability



97%

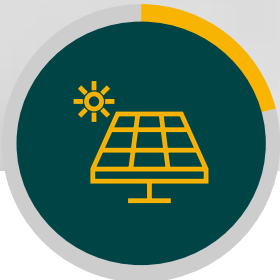
Are Aware Of The Term Sustainability

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%



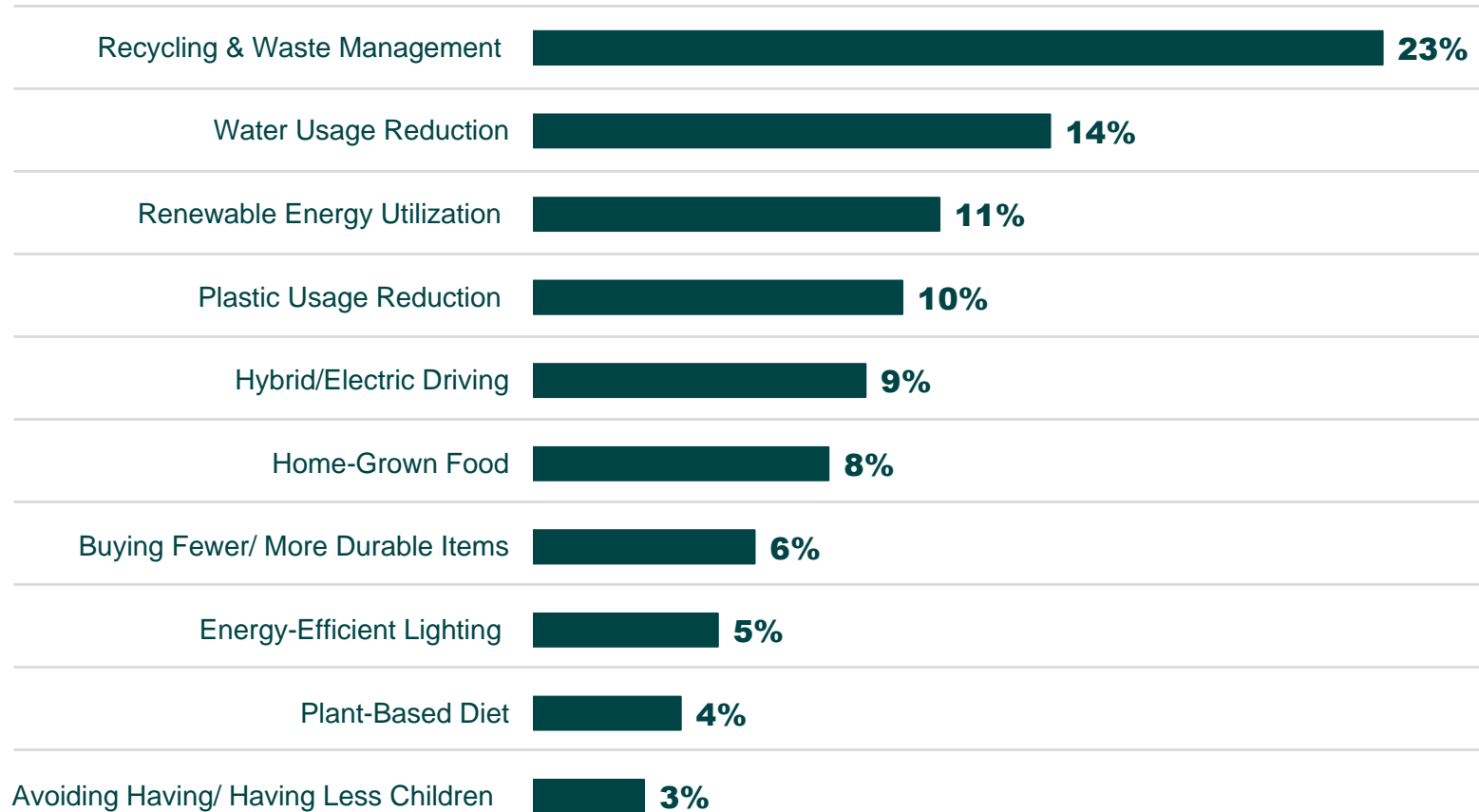
Plastic-Free Products

5%

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

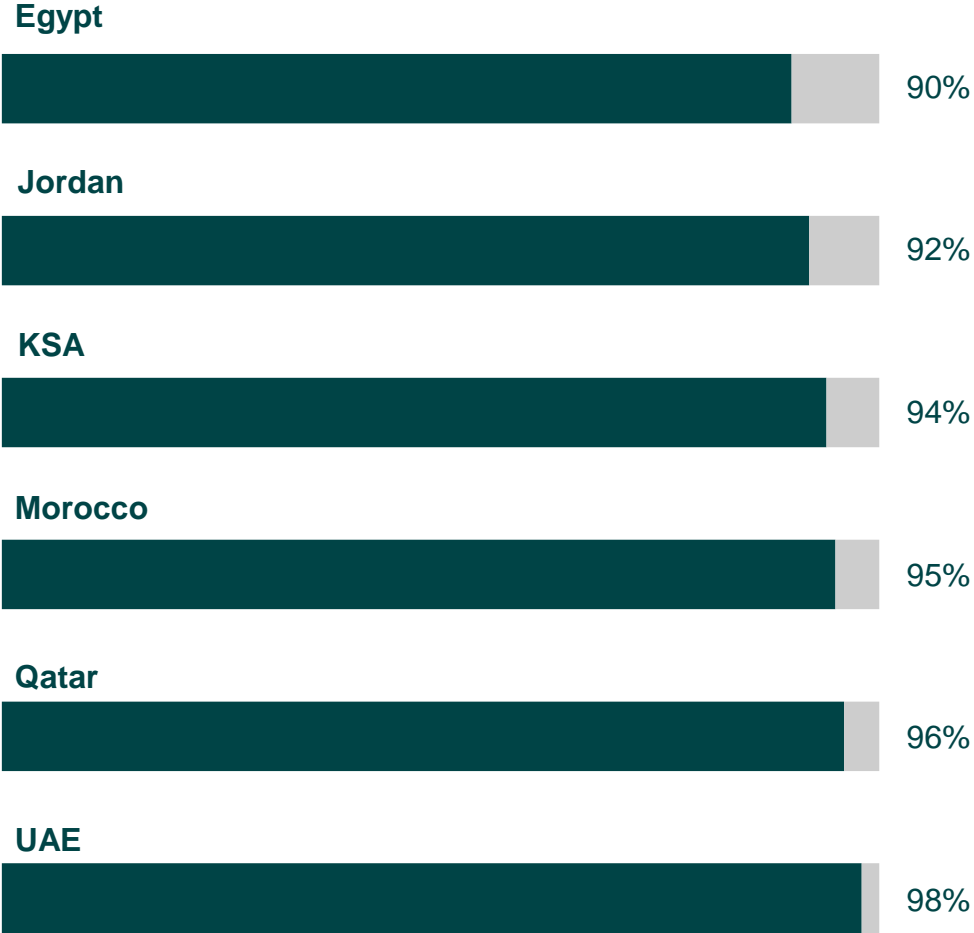
The Majority Have Incorporated Sustainability Practices Into Their Lifestyle In One Way Or Another



94%

Have Taken Steps That Are Linked To A More Sustainable Lifestyle

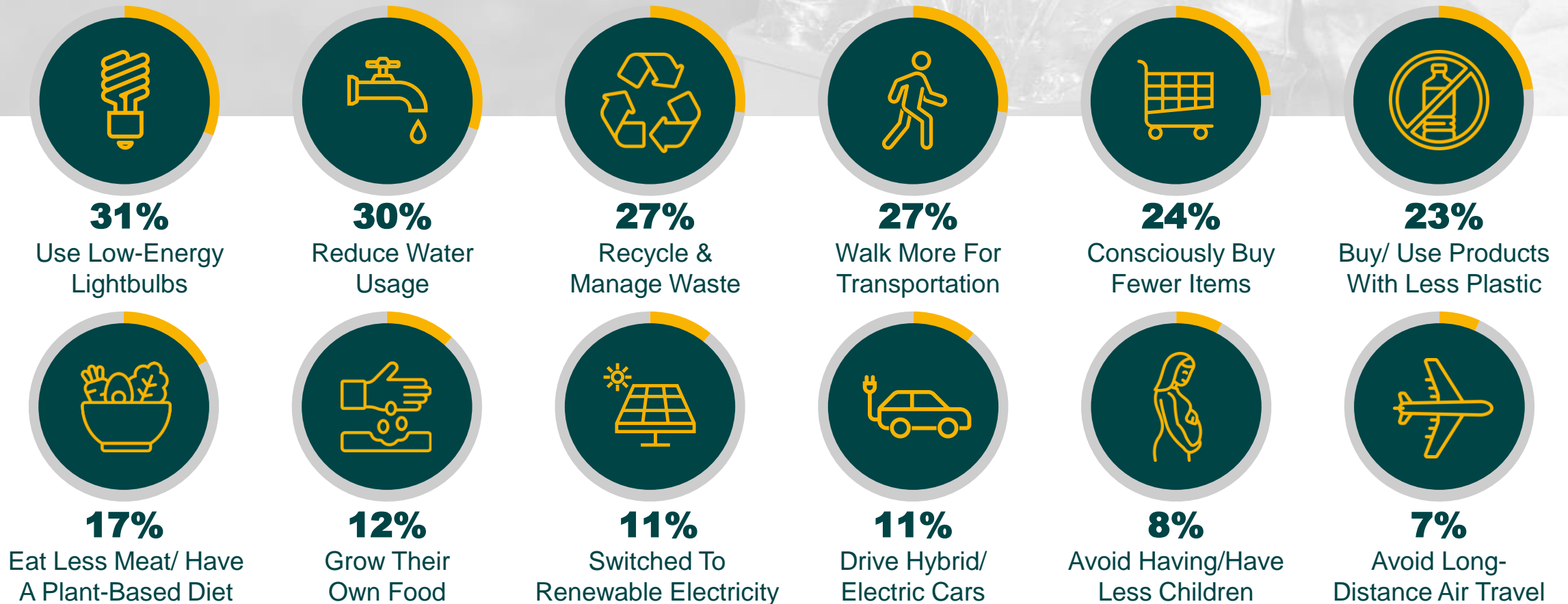
By Country



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
Egypt	28%	39%	22%	17%	34%	10%	17%	5%
Jordan	32%	25%	22%	27%	24%	15%	15%	12%
KSA	30%	21%	27%	29%	19%	22%	17%	15%
Morocco	35%	40%	17%	34%	24%	26%	22%	8%
Qatar	32%	26%	38%	26%	21%	31%	13%	14%
UAE	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
Egypt	37%	32%	38%	27%	31%	21%
Jordan	43%	39%	34%	39%	40%	18%
KSA	41%	40%	37%	35%	33%	25%
Morocco	52%	31%	39%	41%	23%	22%
Qatar	42%	39%	40%	32%	38%	26%
UAE	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%



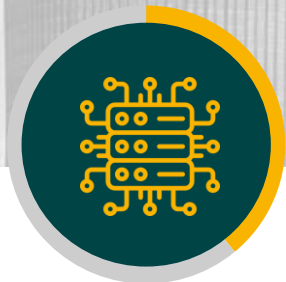
Consumers

15%

	64%	21%	15%
Egypt	82%	13%	5%
Jordan	81%	12%	7%
KSA	46%	29%	25%
Morocco	63%	20%	17%
Qatar	60%	25%	15%
UAE	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%

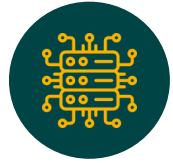
Public Transport Providers



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

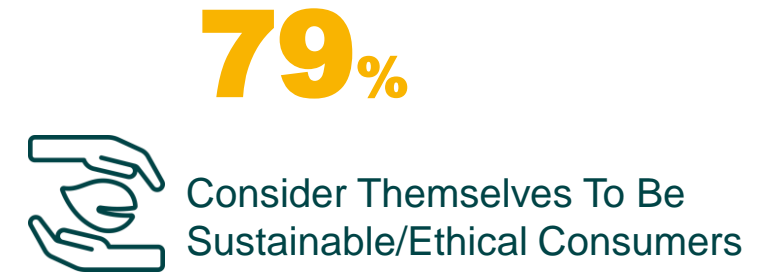
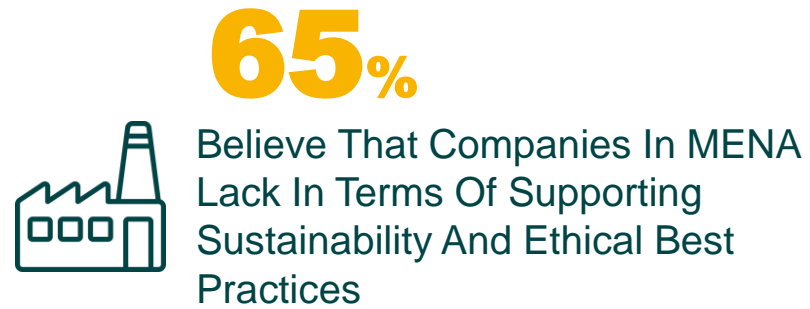
40%



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

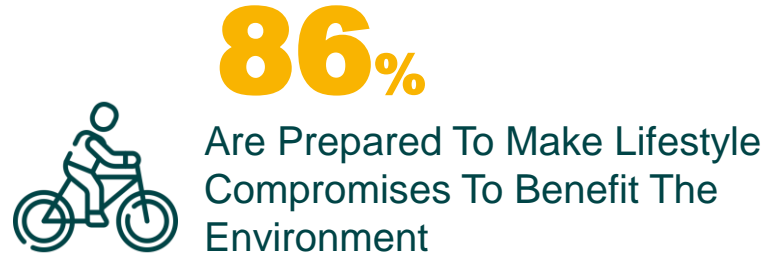
Egypt	54%	44%
Jordan	45%	38%
KSA	60%	50%
Morocco	43%	34%
Qatar	48%	29%
UAE	62%	46%

Corporate Accountability And Consumerism



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

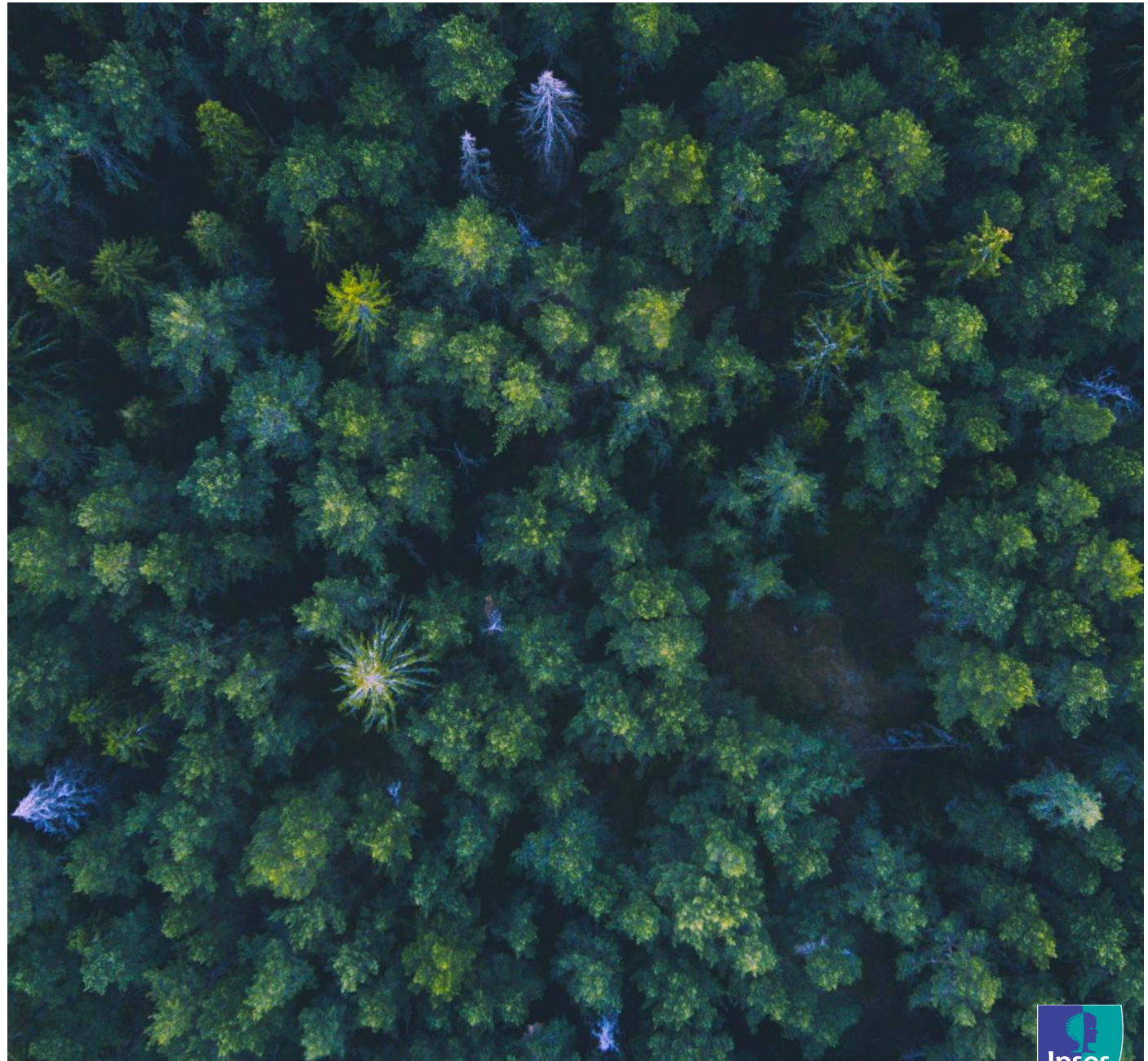
Personal Commitment And Actions



Egypt	91%	60%
Jordan	88%	54%
KSA	77%	63%
Morocco	86%	58%
Qatar	89%	48%
UAE	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:

Mohammed Minawi

Chief Commercial Officer
Ipsos in MENA
mohammed.minawi@ipsos.com

Farah Rihani

Accounts Manager
Ipsos in MENA
farah.rihani@ipsos.com

GAME CHANGERS

