

An aerial photograph of a dense, evergreen forest, likely a coniferous woodland, serves as the background for the entire slide. The trees are tightly packed, creating a textured, dark green canopy. The lighting is even, suggesting a clear day.

Ipsos Social Talks

December 2021

Understanding Sustainability In MENA:

Unfamiliar Territory Waiting To Be Defined

GAME CHANGERS



Scope of Conversation

Online crawling of social data using Ipsos' social listening tool, **Synthesio** to provide objectively measured, modelled and mapped consumer perspectives.



Topic

Environment and Sustainability



Region

MENA



Timeframe

Jul 2018 – Jun 2021



Languages

Arabic & English

Prelude

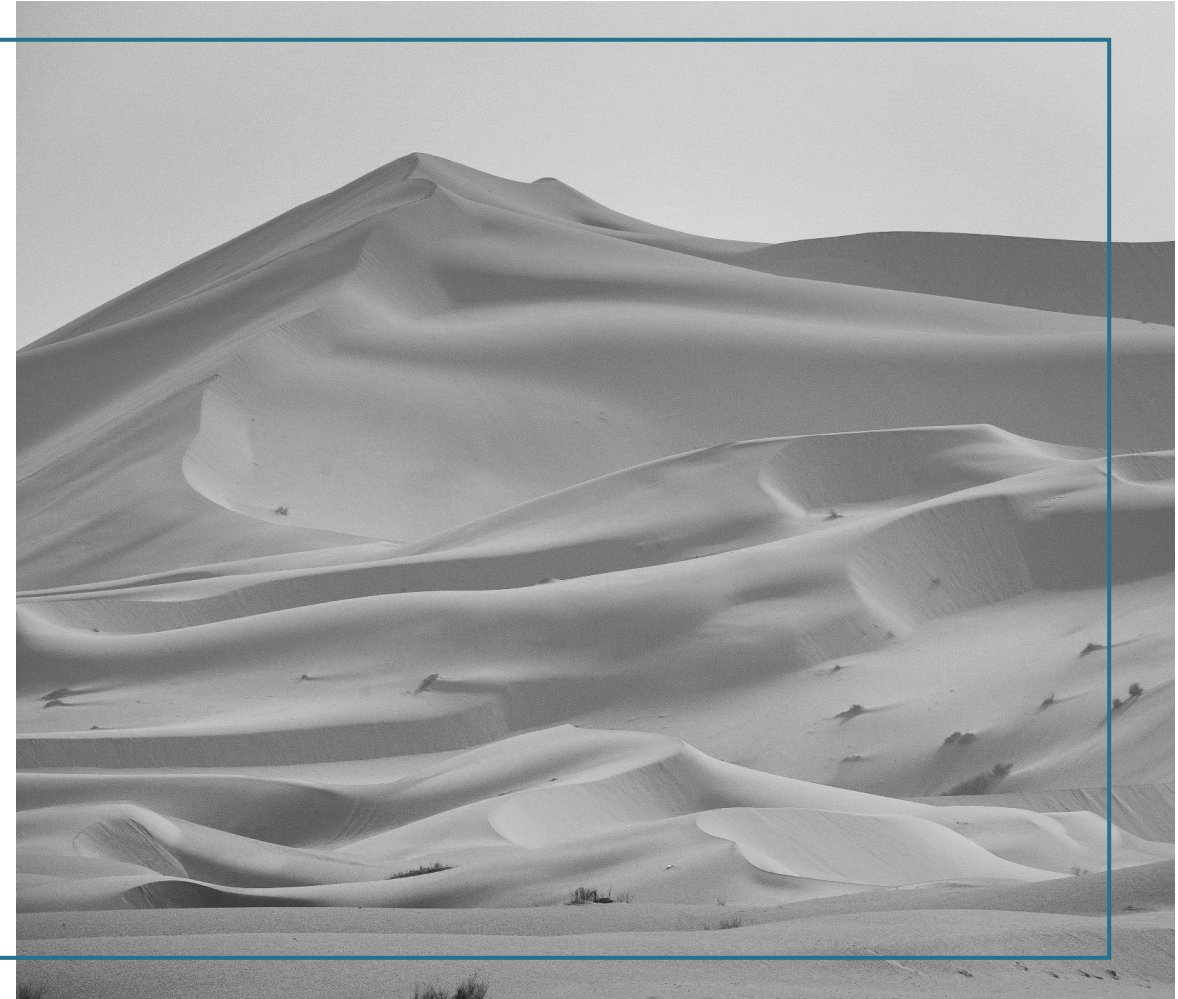
Aiming for a sustainable future deserves much attention if humanity is to live in a healthy world as well as to ensure future generations, plants and creatures across the globe live in safety and thrive.

To that end, there are many factors and challenges that humanity faces in the marathon towards sustainability. Time is of the essence; therefore, it is crucial to understand the drivers and barriers that currently exist.

As the spotlight on environmental issues globally continues to grow, consumers and societies are turning to brands and organizations that strive to lessen the impact we have on our planet.

By understanding which topics, initiatives and drivers resonate more strongly, society, brands, organizations, media outlets and governments can work together to move towards a sustainable future.

This report aims to shed light on the evolution of the environmental conversations in the MENA region, identify the voices that are taking up the cause, understanding the drivers and barriers that people vocalize and determine the role of entities in achieving a sustainable future.



Key Takeaways

Advocacy For Sustainability Is On The Rise

More and more people are starting to praise green initiatives and call for sustainable actions online. It's not merely about more voices raising awareness, rather, the voices that do exist are becoming more emphatic.

Sustainability Conversations Still Revolve Around Basic Concepts

However, the focus of these efforts to raise awareness remains focused on generic themes such as climate change, recycling and pollution. This is not restricted to consumers, as even brands, government entities and influencers approach sustainability via these commonplace themes.

Misalignment Exists Between Consumer Interests And Official Entities

Despite staple themes making up the majority of the conversation, most are declining as specific topics such as sustainable cities and green packaging grow. Moreover, these well-defined topics are more engaging as it brings the spotlight on issues that are not top of mind. While consumers are interested in these well-defined topics, brands influencers and governments focus on generic themes instead.

Brands Have A Real Chance To Shape Sustainability Conversations, Followed By Governments

That said, brands have the widest exposure and engage consumers the most. As such, brands have a responsibility to move away from the generic themes and educate consumers so that the conversation can develop more substance. Governments also have significant reach within the topic. By leading the way, tangible actions and changes can start to manifest to allow society to move towards a more sustainable lifestyle.

Sustainability That Highlights Broader Personal And Societal Benefits Resonate Most

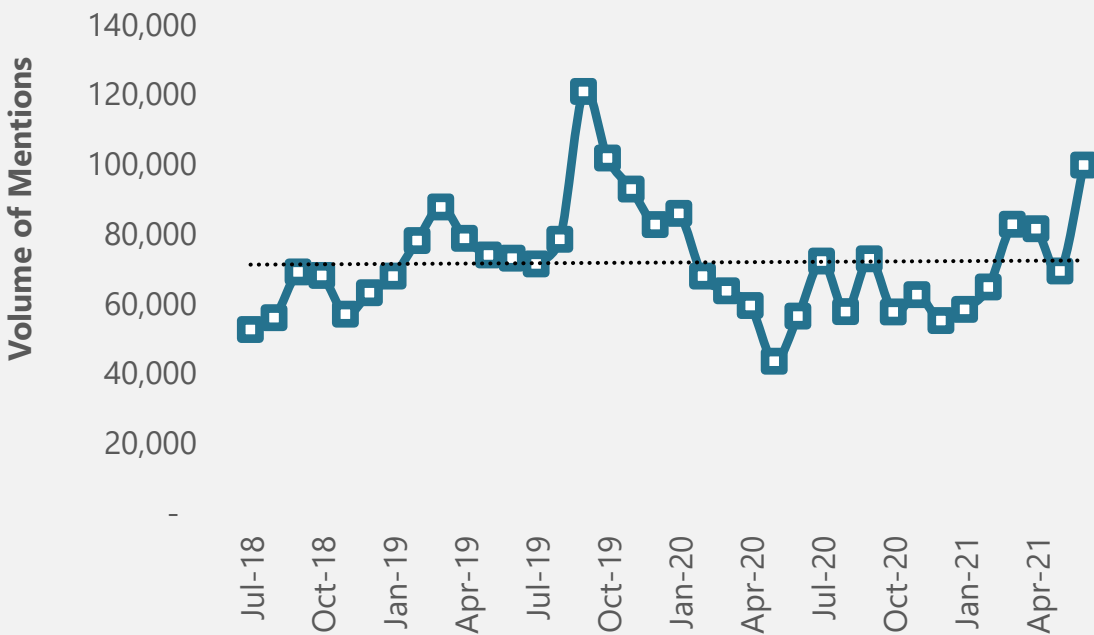
Conversations highlighting the impact of sustainability initiatives on improving the quality of living are well received. People are calling for better public transport to lower carbon emissions, reduce traffic and improve the services in the country. Supporting businesses and projects that focus on green technological advancements are also complimented online. Economic and financial benefits also act as key motivators for consumers to think and act in a more sustainable manner.

Conversations On Sustainability Are On The Rise

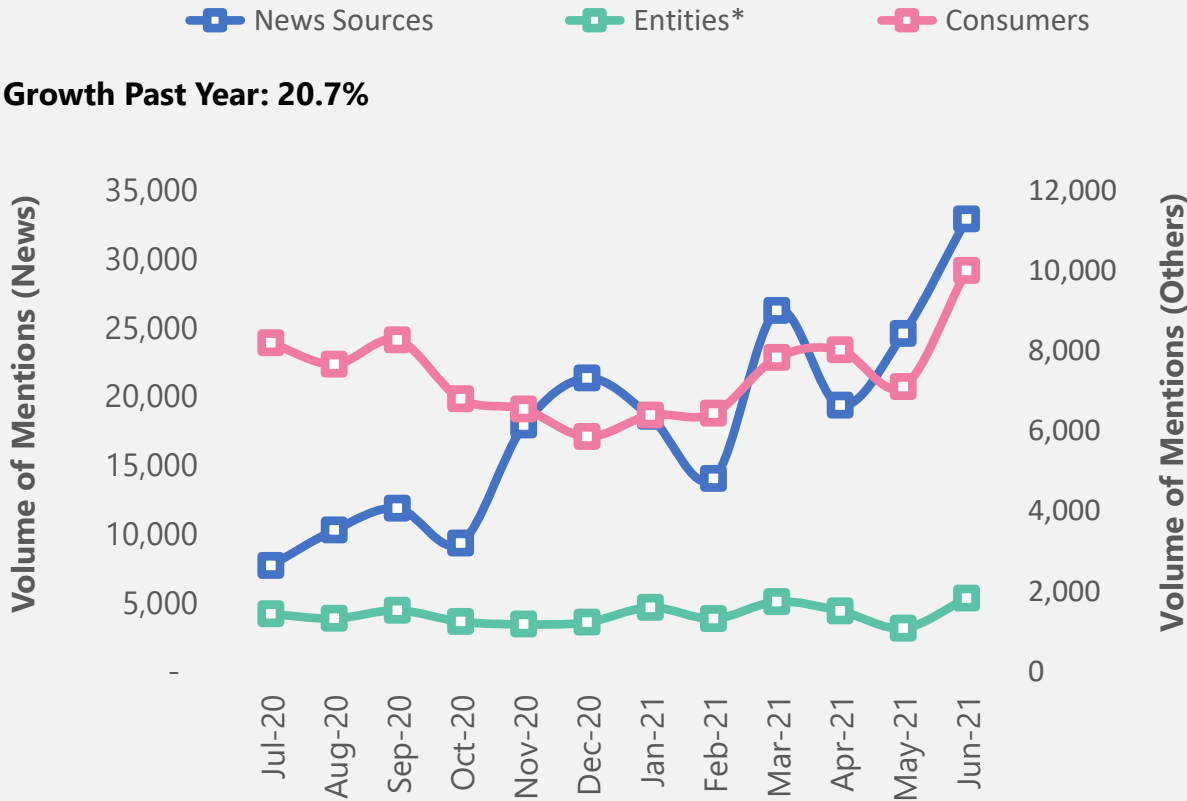
Despite the increase in urgency for environmental solutions, the issues plaguing our planet took a back seat with the emergence of the coronavirus pandemic. As societies adjusted to the pandemic, the conversations started picking up again, particularly from news outlets and consumers.

Evolution Over Time

Growth Past 3 Years: -11.8%



Growth Past Year: 20.7%



*Entities include brands, government sources, influencers and NGOs

Raising Awareness Dominates Consumer Conversations Online

Most people online are trying to raise awareness about environmental issues and implore others **to prioritize sustainability**. A few even believe that humanity has already moved beyond the point for which the Earth can be saved.

Advocates are **vigorously vocal when it comes to wildlife**, as creatures are going extinct while human populations continue to rise.

While many **products** are named as having a **negative impact** on the environment, the **automotive** industry receives the most emphasis.

When news or initiatives are published, a few call out the fact that there are more factors to consider; and that while intentions are in the right place, reality is not as simple and there are **better solutions** out there.

In that vein, people provide their thoughts on which areas should be the **priority of focus** for project **investments** as well as **research**. Moreover, some share news on the **latest innovations** and technological developments that have a positive impact on the environment such as sustainable smart homes, eco-friendly products and energy saving technology to name a few.

Nature of Consumer Conversations



44.7%

Raising Awareness on Issues



20.0%

Reaction to News/Speech



13.3%

Impact of Products



10.0%

Ideas & Solutions



8.7%

Initiatives & Projects



5.3%

Level of Development in Country



4.7%

Impact of Conflict and Pandemic



4.0%

Technological Developments



3.3%

Politics



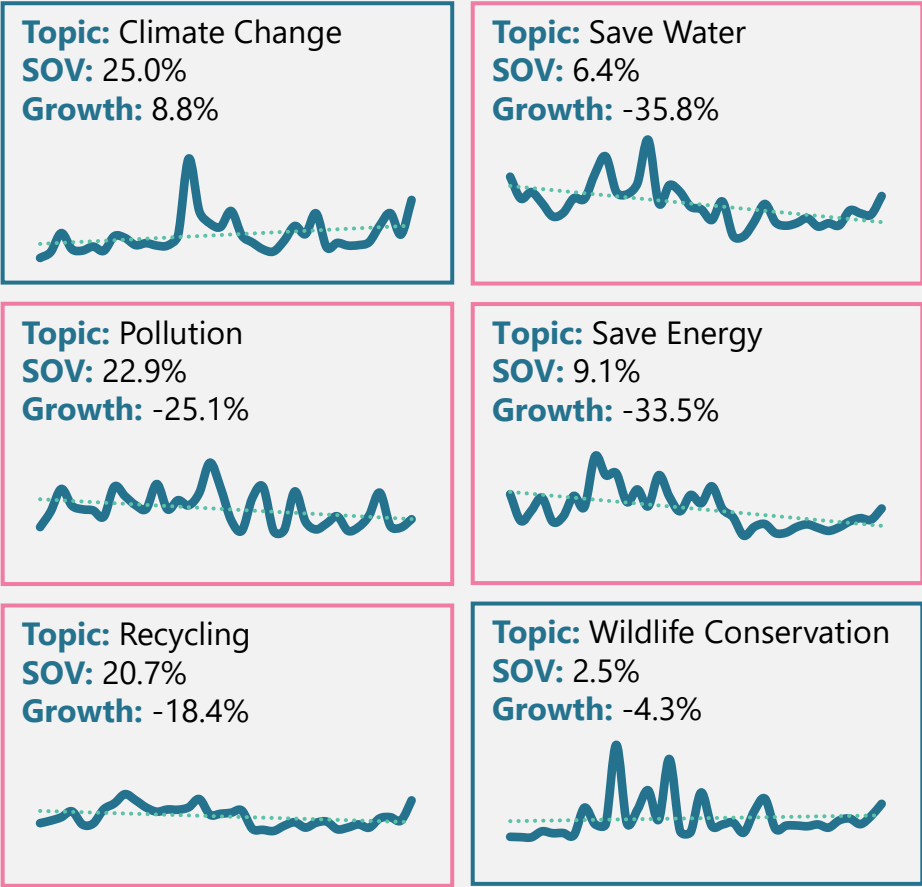
1.3%

Impact of Relevant Parties

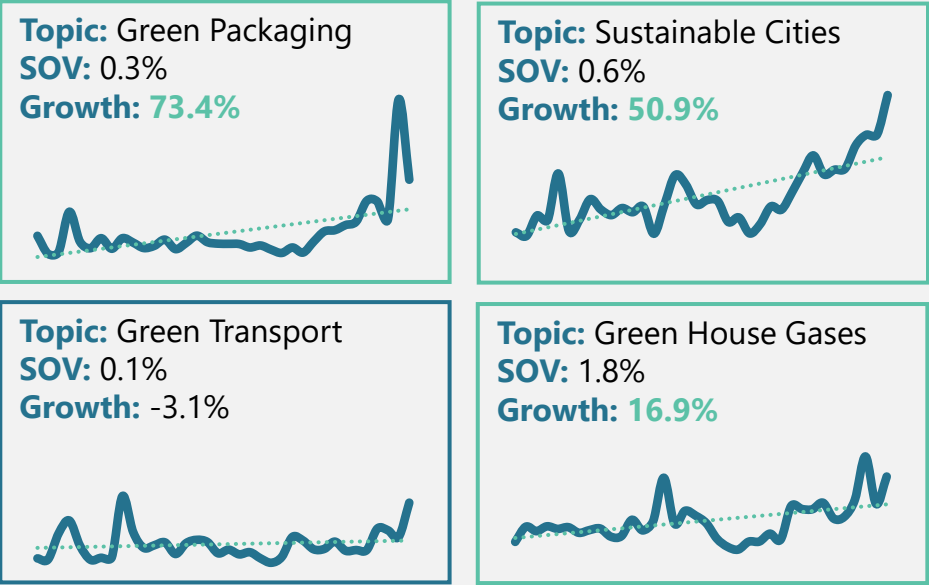
Staple Themes Remain Central Yet Starting To Trickle Down To More Detailed Topics

Evolution of Topics Over Past Three Years

Staple Themes are Declining



Specific Topics Have High Growth Rates



Common themes such as pollution, recycling and saving energy have gone down compared to previous years. In their stead, smaller topics like sustainable cities and green packaging are growing, even though those topics still have a smaller share of the wider conversations.

Some exceptions include climate change, which continues to be a key point of conversation. Yet, the consumer conversations on climate change are more generic than other topics.

It's worth noting that the desire to curb pollution extends beyond environmental reasons. People feel that pollution takes away from their ability to enjoy the surroundings, with many associating pollution with sight and noise pollution as well.

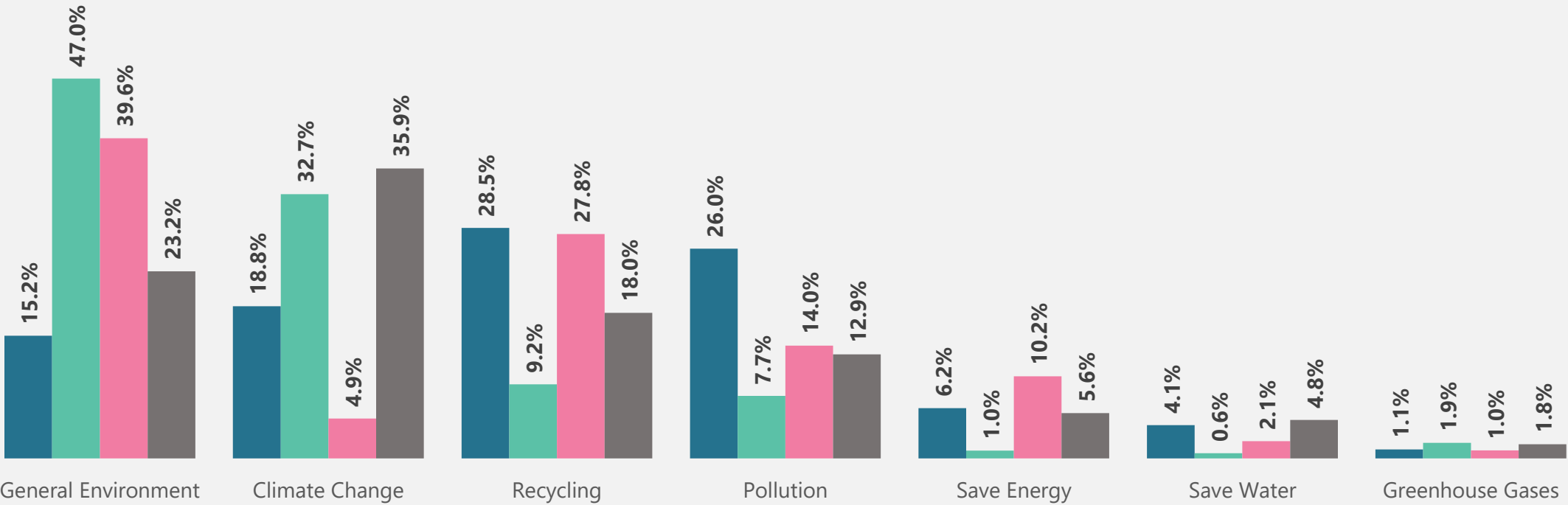


Consumers Are More Specific In Their Conversations

Consumers tend to be more focused in their conversations and pollution comes up as a key concern for them, as opposed to influencers and brands who post generic calls under the umbrella of sustainability; the latter tend to stress environmental sustainability and going green without going into the specifics. Climate change is the biggest topic of conversation, but brands rarely discuss it directly, rather, they focus on recycling. It is the opposite for influencers who tend to neglect the topic of recycling.

Topics of Discussion by Source

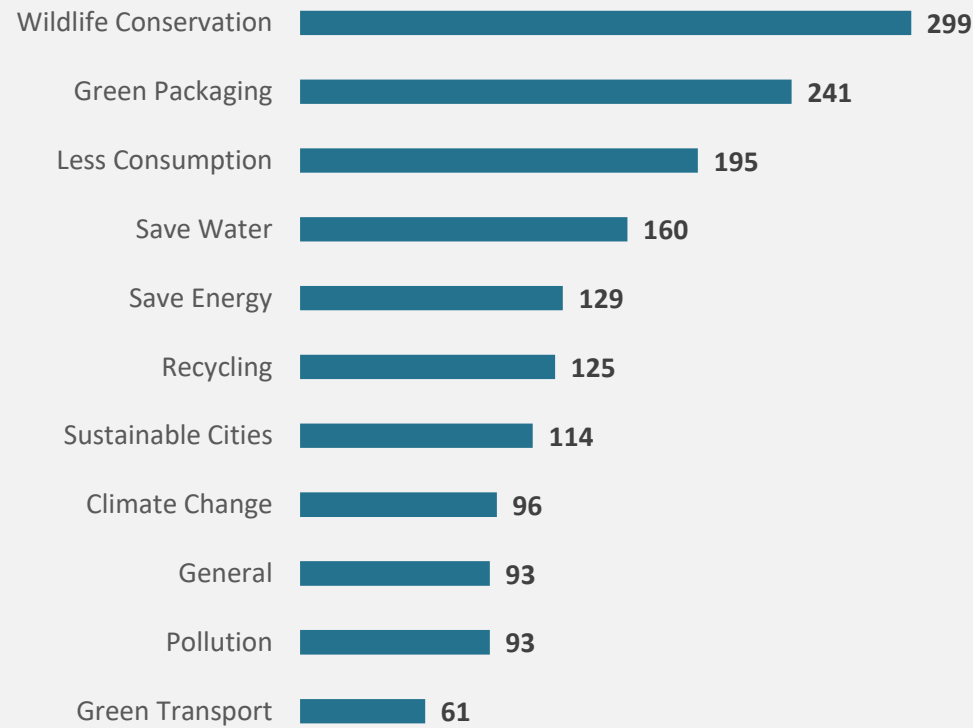
Consumers Influencers Brands Government Sources



Generic Topics Drive Volume, Specific Topics Drive Engagement

Despite pollution, recycling and climate change having larger volumes, it is the more specific, albeit smaller topics that people interact with. Some consumers are becoming more knowledgeable and are engaging in the more detailed topics tackling sustainability.

Average Interactions* per Topic



Average Interactions: provides the average number of social interactions, including likes, dislikes, reactions, retweets, comments, replies and shares.

Sample of Top Interacted with Posts



karimkassem86
El Gouna

@elgounafilmfestivalofficial Tuxedo by ... who cares? 😊
This Pin is Made Out of **Plastic Waste** by @zedartcorner in Collaboration with @blackduckdesign to Reduce Plastic Pollution and **Save These Creatures..**



eswaratti
Paid partnership with loccitaneme

I love how @loccitaneme makes the gifting experience so beautiful with so many options to gift your self & loved ones ❤️ Also they only use **natural & sustainable ingredients and eco-friendly packaging** 📦 #GiftsOfNature



Experience natural air conditioning inside the #Spain Pavilion, where a series of conical structures will keep things cool. The 6,000sqm pavilion is built from **reusable wood, iron and fabric**, reflecting Spain's **circular economy principles**. #Expo2020 #Dubai

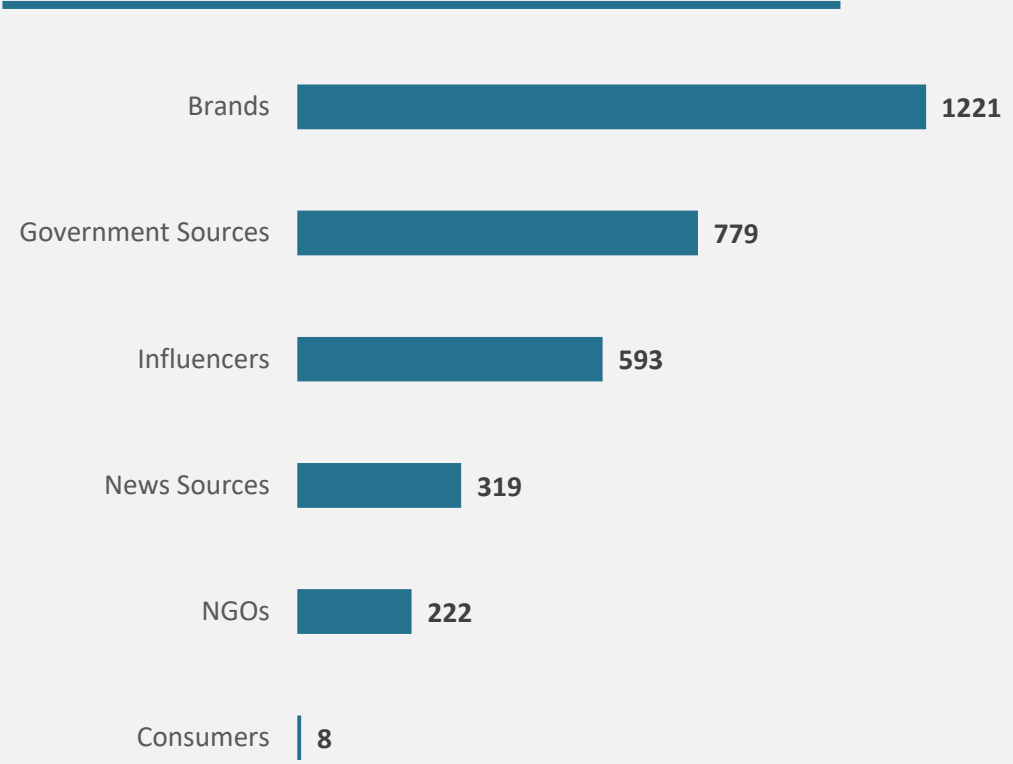


As part of our commitment to **preserving the environment**, we are collaborating with the **Saudi Wildlife Authority** and the Smithsonian Institution to **conserve the Asiri Magpie** from extinction.

Brands Potentially Have The Largest Influencing Power

Although brands, governments and influencers are less vocal on sustainability, they do stand out when it comes engagement levels. Brands in particular are able to use their reach and influence to educate the region's consumers and help shape a well-defined sustainability mindset.

Average Interactions* per Source

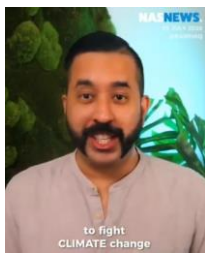


Sample of Top Interacted with Posts



Etihad Airways
January 19

It's Abu Dhabi Sustainability Week, and we're committed as ever to achieving **our goal of net zero carbon emissions by 2050.**



Imran Khan
@ImranKhanPTI

Proud of our efforts for a clean and green Pakistan to fight pollution and climate change.



mariam.el.khosht

So proud to be wearing this brand... **prove that you CAN live in a sustainable way without harming the Earth** @thisisavani is an eco friendly brand that **uses upcycled vegan leather and plastic...**



Umniah
October 16, 2020

Together we **grow** and move towards **sustainability**

archdigest

It was also important to do so in a way that considered a high-quality design with **integrity and sustainability**

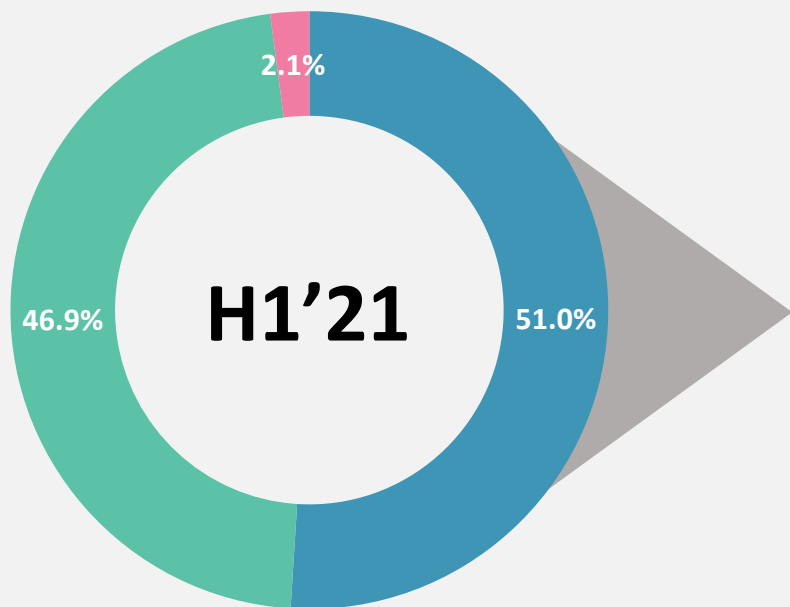


Average Interactions: provides the average number of social interactions, including likes, dislikes, reactions, retweets, comments, replies and shares. The number of views is included when available.

Emphatic Supporters Demonstrate More Knowledge

Stance on Pushing Ecofriendly Actions

■ Basic Support ■ Emphatic ■ Against



46%
of which
acknowledge the
challenges that exist

Most people who talk about environmental sustainability support environmental initiatives and call for others to do their part.

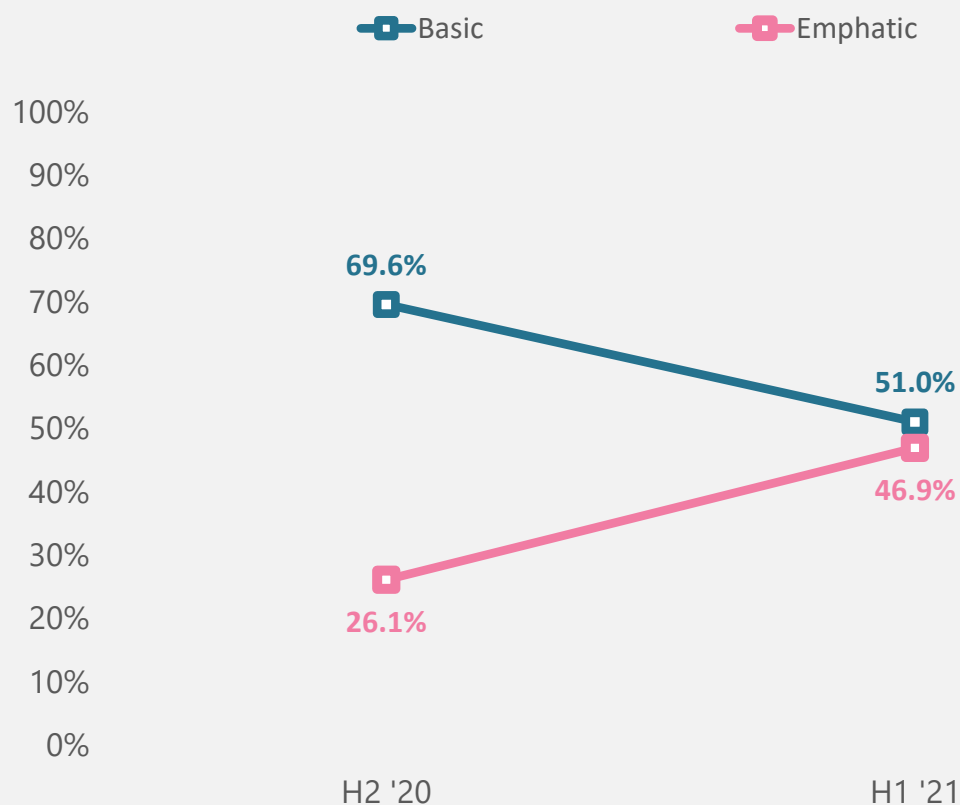
That said, **some supporters are more emphatic** than others. They believe strongly in their opinions and the environmental cause. Those that are emphatic are also **more educated** regarding sustainability issues and **provide information** when rallying others to their cause.

On the other hand, basic supporters understand that certain actions have environmental benefits, but generally do not go into as much detail.

A small minority speak out in skepticism when it comes to sustainability, believing that there are other issues that are more prevalent or deny that climate change exists.

And Consumers Are Becoming More Emphatic

Environment Stance Evolution



Despite half of supporters being emphatic to the cause, this has grown significantly compared to consumers' stance at the end of 2020. Below are a sample of the types of topics addressed by emphatic consumers:



We must recommit to being a voice for our ocean. Climate change, plastic waste, and other pollution is taking a devastating toll and we don't have much time left to act.



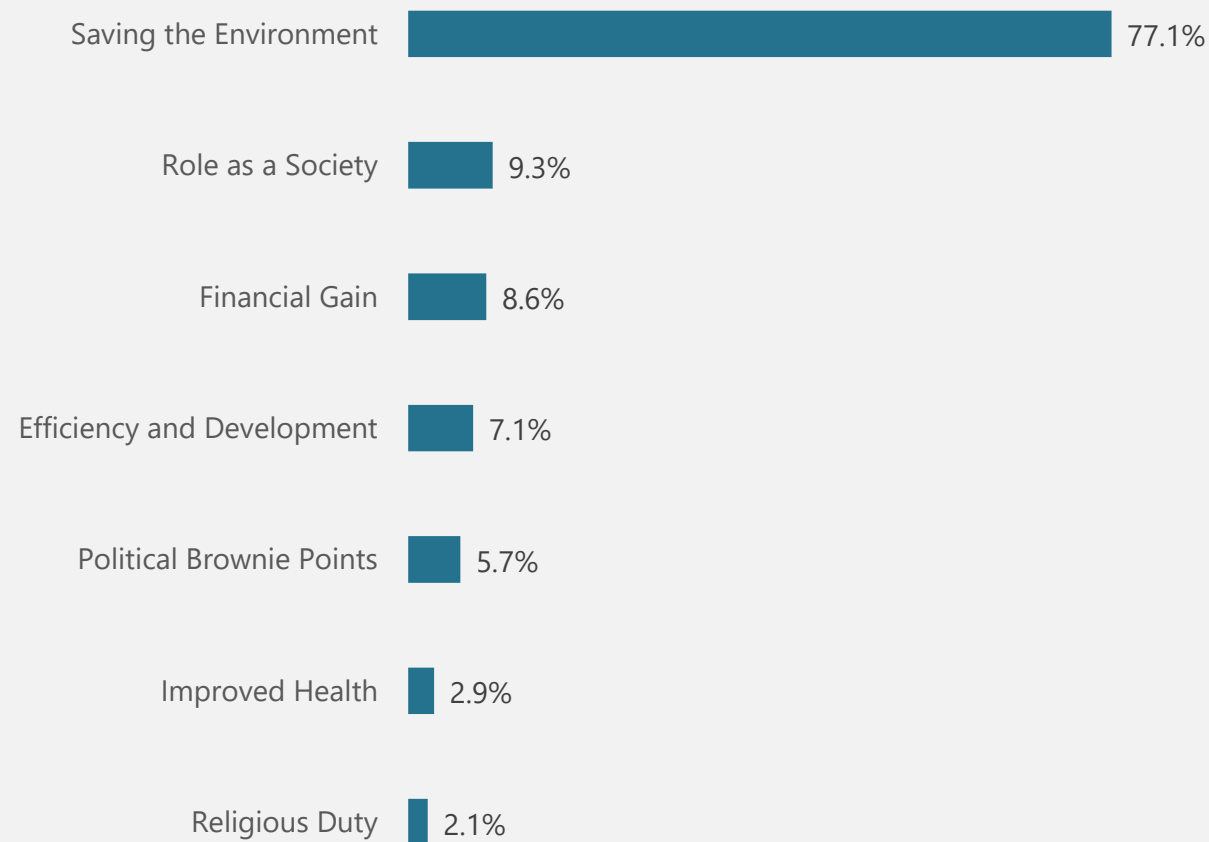
When can people understand that the world is over-populated. Stop having so many kids people, humans are not going extinct, animals are.



The glaring problem people don't know about is that overfishing may be the single biggest problem effecting climate change for a number of reasons

Economic Impact, Both Personal And Societal, Motivates Consumers

Motivations for Sustainable Advocacy



The key motivator for people to speak up for the environment is the importance of **reaching sustainable solutions** to lessen our impact on our planet. For some, living more sustainably is a **societal responsibility** that everyone should work together to achieve, particularly for the sake of **future generations**.

Some people point out that initiatives which are good for the environment also have a **positive impact on the country's development**. The region's consumers understand that the financial investments required may be an issue to launching such projects.

One of the main drivers of action that also translates into actual positive behavior remains **financial in nature**. Many people purchase energy saving light bulbs and try to reduce their consumption of water and electricity to **save money**.

Society Understands The Challenges Standing In The Way Of A Green Future

Perceived Barriers to Sustainable Action



While the call for sustainability is loud online, **46% of people also acknowledge the numerous challenges** that hinder that goal.

The **chief perceived barrier is governmental** in nature, with people feeling that some measures taken are **too lenient and ineffective**, or that people in power are **not knowledgeable enough** on the topic.

Another layer is that the desire for strong economies and **greed** pushes environmental initiatives that are not profitable to the side. Moreover, **not everyone has faith in society** being able to rise to the challenge; either because they don't have the proper priorities, or they feel not enough awareness exists.

People are also calling for immediate action; given the **limited time** left to quell the large impact of human actions as humanity approaches the **point of no return**.



Ipsos Social Talks

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GAME CHANGERS

