

# VIEWS ON SUSTAINABILITY

**Saudi Arabia Edition**

August 2023

**GAME CHANGERS**





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# HOW CONCERNED ARE PEOPLE ABOUT ENVIRONMENTAL ISSUES?

# 2 In 5 Mention Environmental Issues As A Primary Global Concern



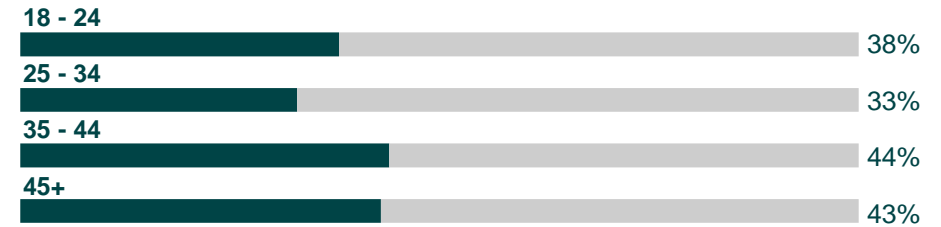
# 40%

## Have Concerns About The Environment

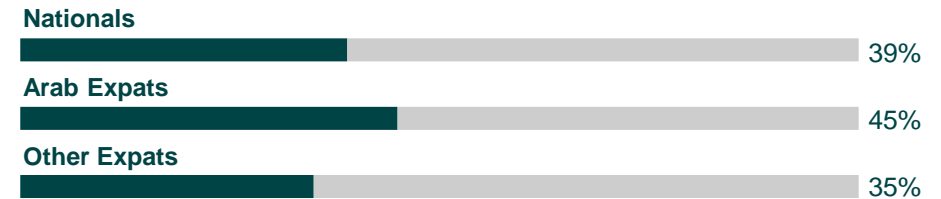
### By Gender



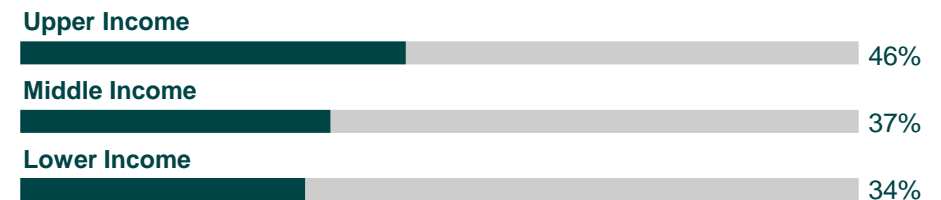
### By Age



### By Nationality



### By Income Level



# However, A Brand's Commitment To Sustainable Practices Only Affects Brand Selection Of 1 In 4 People



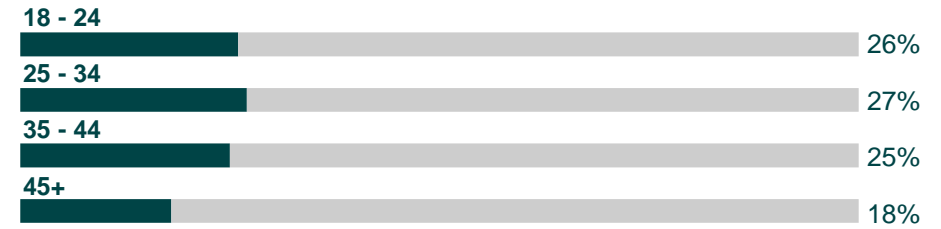
**24%**

Prioritize Socially Responsible & Eco-Friendly Brands

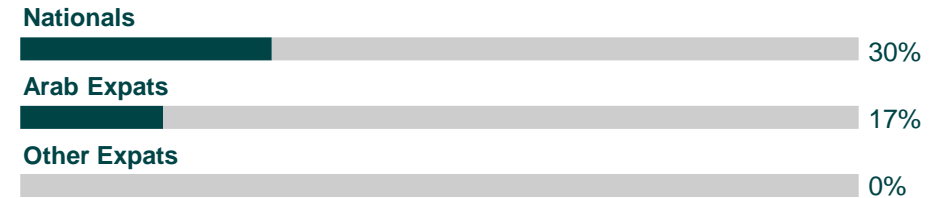
## By Gender



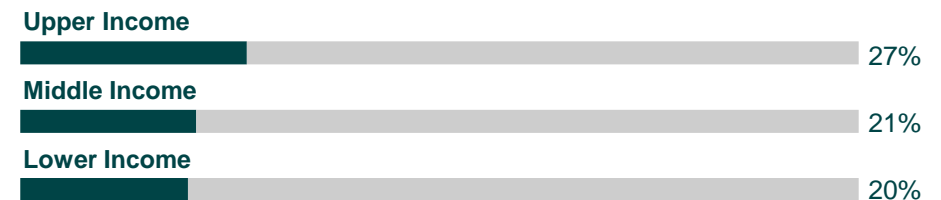
## By Age



## By Nationality



## By Income Level

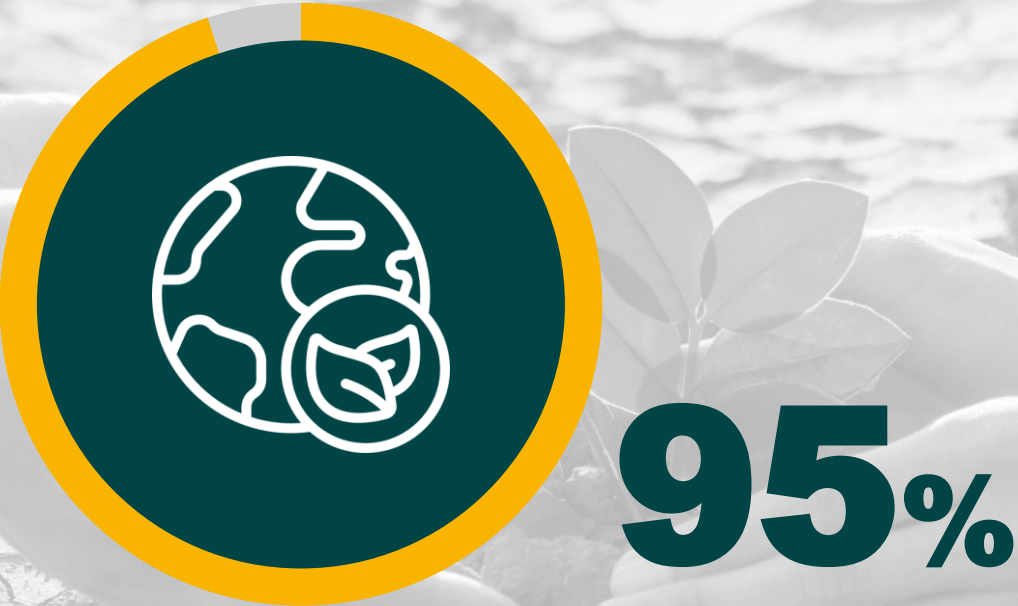






# THE PUBLIC'S UNDERSTANDING OF SUSTAINABILITY

# The Majority Say They Are Aware Of The Term Sustainability



Are Aware Of The Term Sustainability

## By Gender



## By Age



## By Nationality



## By Income Level



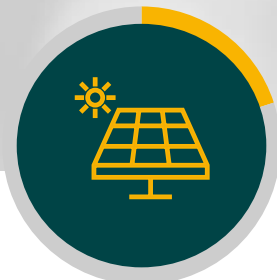
# Sustainability Is Linked To A Diverse Range Of Subjects With Natural Resources Conservation And Renewable Energy Sources Being The First Aspects That Come To Mind

## Top Topics Associated With Sustainability



**21%**

Natural Resources  
Conservation



**20%**

Using Renewable  
Energy Sources



**14%**

Ethical  
Consumption



**11%**

Nature  
Preservation



**10%**

Recycling



**7%**

Water  
Saving



**7%**

Reducing  
Pollution



**5%**

Plastic-Free  
Products



# Sustainability Topic Associations By Demographics



Natural Resources  
Conservation

**21%**

24%

15%



Using Renewable  
Energy Sources

**20%**

19%

22%



Ethical  
Consumption

**14%**

12%

17%



Nature  
Preservation

**11%**

10%

13%



Recycling

**10%**

10%

10%



Water  
Saving

**7%**

8%

5%



Reducing  
Pollution

**7%**

8%

7%



Plastic-Free  
Products

**5%**

5%

6%

**Male**  
**Female**

**18 - 24**

**25 - 34**

**35 - 44**

**45+**

**Nationals**

**Arab Expats**

**Other Expats**

**Upper Income**

**Middle Income**

**Lower Income**

17%

22%

21%

21%

18%

22%

31%

18%

24%

18%

15%

18%

19%

25%

19%

21%

20%

21%

20%

16%

16%

15%

10%

14%

13%

12%

22%

14%

13%

14%

14%

12%

8%

12%

12%

11%

10%

12%

11%

9%

13%

6%

15%

6%

10%

11%

4%

11%

9%

7%

4%

10%

6%

7%

9%

5%

-

8%

5%

13%

9%

8%

10%

4%

8%

7%

4%

7%

10%

1%

2%

5%

7%

6%

5%

6%

6%

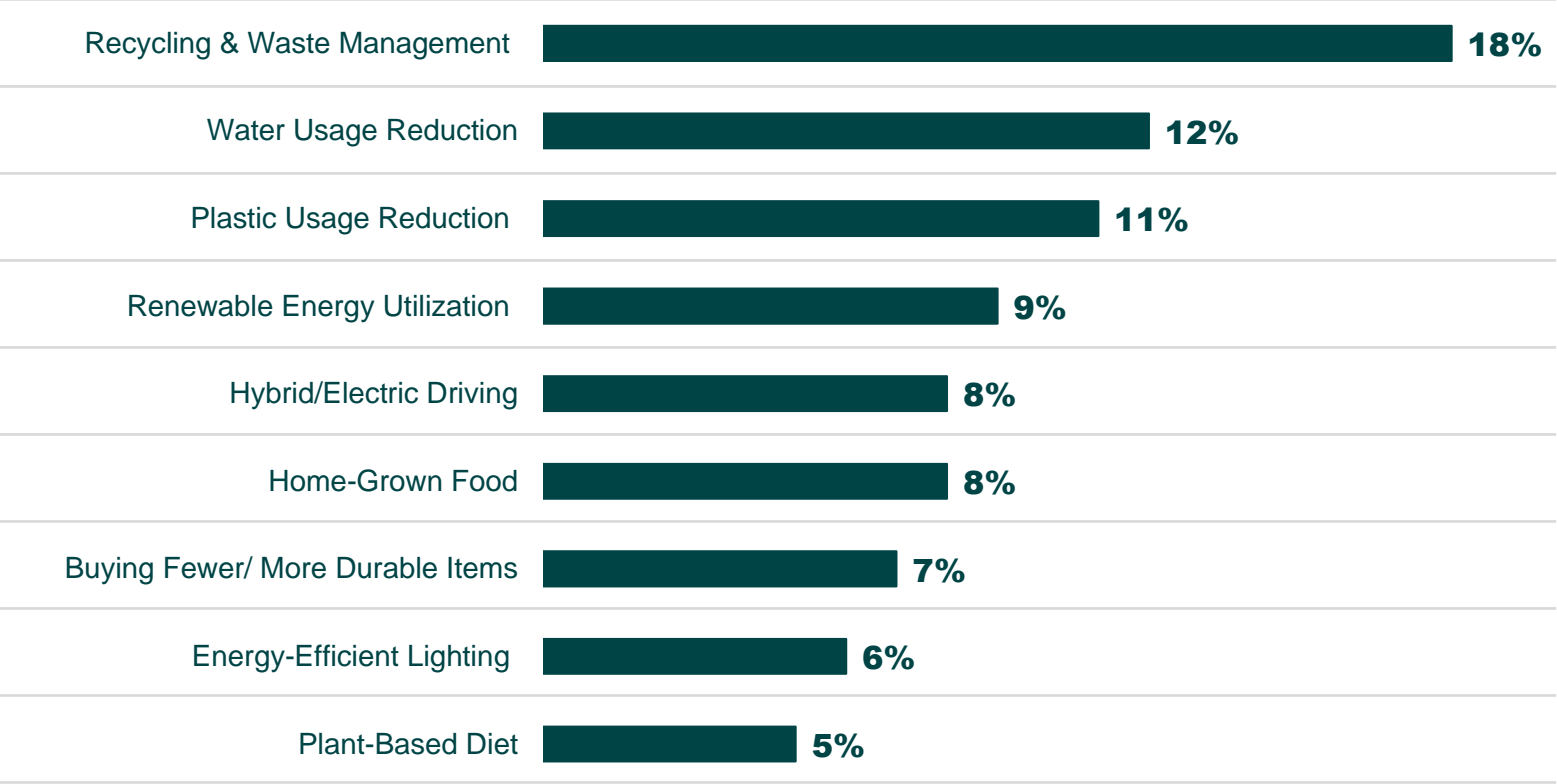
6%

5%

6%

# Yet, People Have A Misguided Assessment Of The Actions That Have The Highest Impact On Sustainability

Top 10 Actions Perceived To Have The Most Impact



Top 5 Actual Impact Actions Rank\*

	Top 5 Actual Impact Actions Rank*	Perceived Rank
Avoiding Having/ Having Less Children	1	14
Living Car-Free	2	11
Avoiding Long-Distance Air Travel	3	13
Renewable Energy Utilization	4	4
Hybrid/ Electric Driving	5	5

\*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**



# The Majority Have Incorporated Sustainability Actions Into Their Lifestyle In Some Way Or Another



94%

Have Taken Steps That Are Linked To A More Sustainable Lifestyle

## By Gender



## By Age



## By Nationality



## By Income Level



# Sustainability-positive Actions Taken By Consumers Vary, With A Focus On Easy To Medium Effort Practices Such As Using Low-energy Lightbulbs And Walking More

## Sustainability Actions Taken



**30%**

Use Low-Energy  
Lightbulbs



**29%**

Walk More For  
Transportation



**27%**

Recycle &  
Manage Waste



**22%**

Buy/ Use Products  
With Less Plastic



**21%**

Reduce Water  
Usage



**19%**

Consciously Buy  
Fewer Items



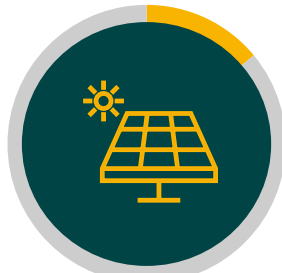
**17%**

Eat Less Meat/  
Have A Plant-  
Based Diet



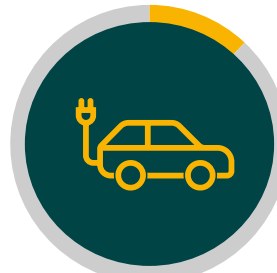
**15%**

Grow Their  
Own Food



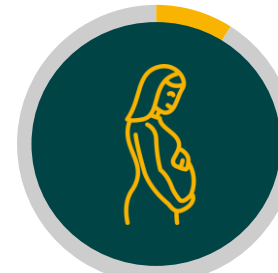
**14%**

Switched To  
Renewable  
Electricity



**12%**

Drive Hybrid/  
Electric Cars



**9%**

Avoid Having/Have  
Less Children



**9%**

Avoid Long-  
Distance Air Travel

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

## Motivators For Sustainable Living



**41%**

Being More Aware Of Sustainable Practices Implementation



**40%**

If Sustainable Practices Are Convenient



**37%**

If Sustainable Practices Are Also Applied by Others



**35%**

If Sustainable Practices Don't Have An Extra Cost



**33%**

If There's An Economic Incentive



**25%**

If The Law Requires It



# Motivators For Sustainable Living By Demographics



Being More Aware Of Sustainable Practices Implementation

**41%**



If Sustainable Practices Are Convenient

**40%**



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

**33%**



If The Law Requires It

**25%**

<b>Male</b>	42%	38%	38%	32%	31%	26%
<b>Female</b>	40%	42%	35%	38%	35%	25%
<b>18 – 24</b>	36%	42%	37%	39%	28%	27%
<b>25 - 34</b>	34%	41%	34%	28%	34%	27%
<b>35 - 44</b>	49%	47%	31%	28%	34%	26%
<b>45+</b>	43%	29%	45%	45%	33%	22%
<b>Nationals</b>	43%	42%	39%	32%	35%	23%
<b>Arab Expats</b>	37%	36%	32%	38%	31%	28%
<b>Other Expats</b>	38%	31%	35%	42%	20%	28%
<b>Upper Income</b>	41%	39%	34%	35%	30%	28%
<b>Middle Income</b>	44%	40%	40%	35%	35%	25%
<b>Lower Income</b>	31%	40%	35%	34%	30%	16%



# **SUSTAINABILITY RESPONSIBILITY & INDUSTRY PERCEPTIONS**

# Almost Half Think Governments Should Bear The Cost Of Sustainable Practices, While 3 In 10 Believe It Should Be Businesses. A Quarter Are Open To Bearing The Costs Themselves



**46%**

Governments



**29%**

Businesses



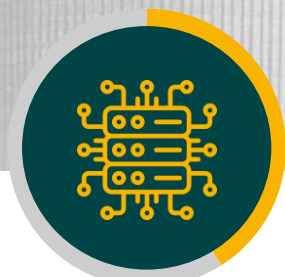
**25%**

Consumers



# People Believe That The Most Sustainably Responsible Sectors Are Technology Companies Followed By Oil & Gas Companies, Fashion Brands And Airlines

Industries People Think Are Most Active On Sustainability



**41%**

Technology  
Companies



**37%**

Oil & Gas  
Companies



**36%**

Clothing &  
Fashion Brands



**36%**

Airlines



**29%**

E-commerce  
Companies



**29%**

Household Goods  
Manufacturers



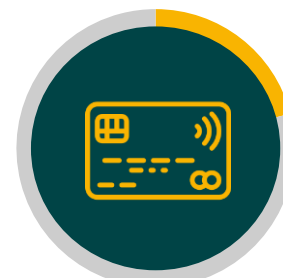
**27%**

Hospitality



**25%**

Automotive  
Manufacturers



**21%**

Financial Service  
Providers



**18%**

Public Transport  
Providers

# Out Of The Top 10 Brands Most Associated With Sustainability, 7 Are Local Brands, with Aramco Taking The Lead

Top 10 Brands Associated With Sustainable Practices



1



2



3



4



5



6



7



8



9



10



# ATTITUDES TOWARDS SUSTAINABILITY



# Economic Prioritization And Skepticism



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

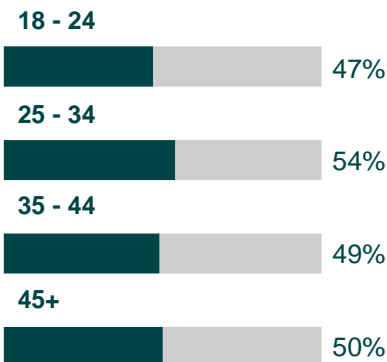
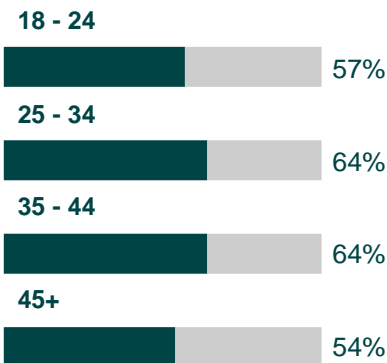


Don't Believe That Climate Change Is As Serious An Issue As It Is Made Out To Be

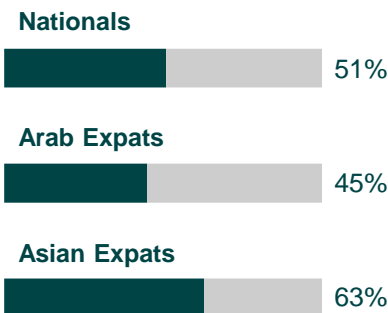
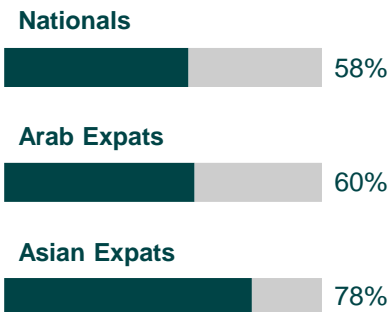
## By Gender



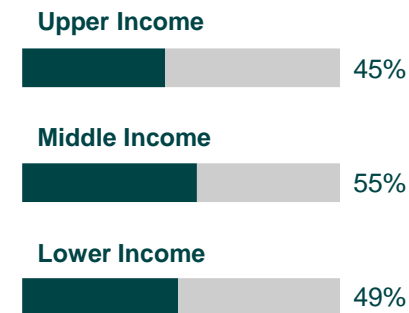
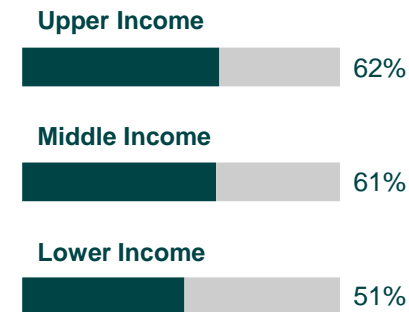
## By Age



## By Nationality



## By Income Level



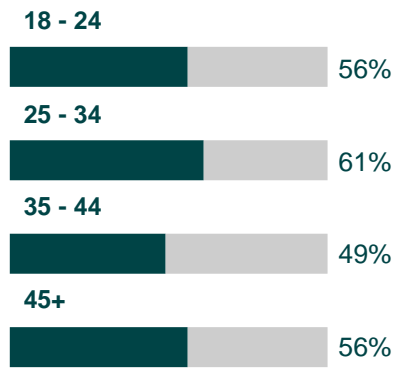
# Corporate Accountability And Consumerism



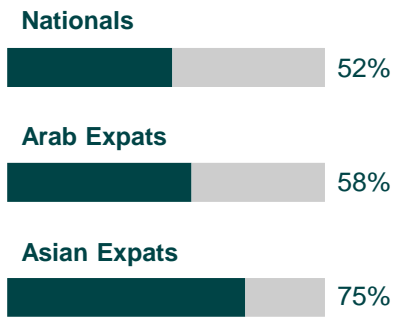
## By Gender



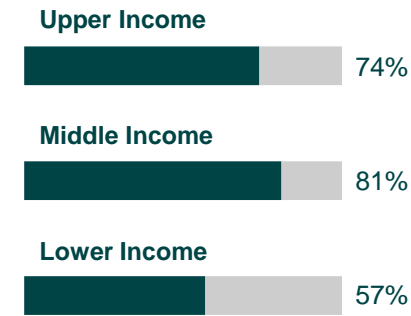
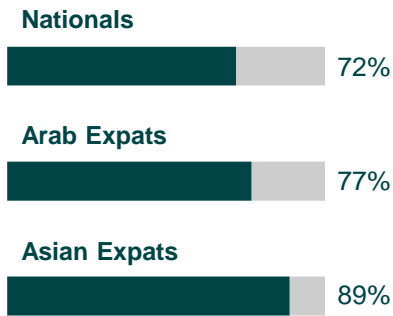
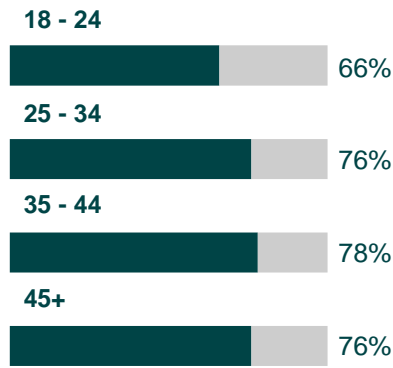
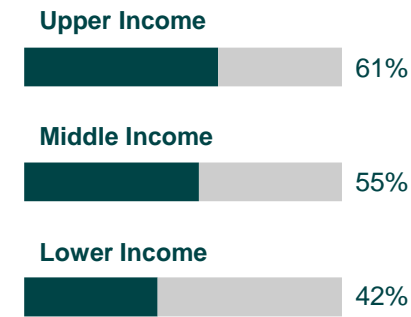
## By Age



## By Nationality



## By Income Level



# Personal Commitment And Actions

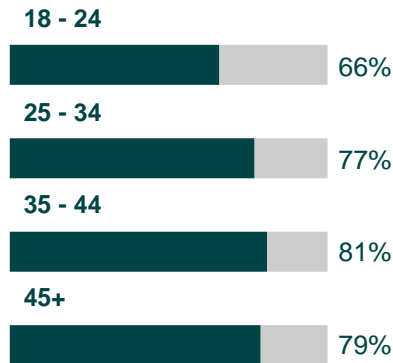


Are Prepared To Make Lifestyle Compromises To Benefit The Environment

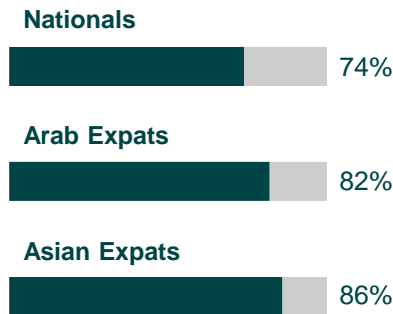
## By Gender



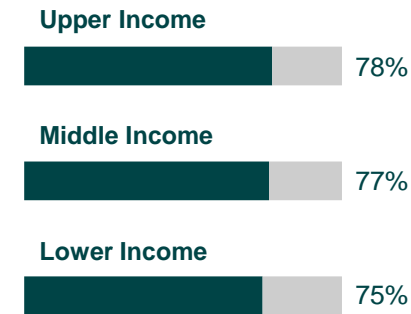
## By Age



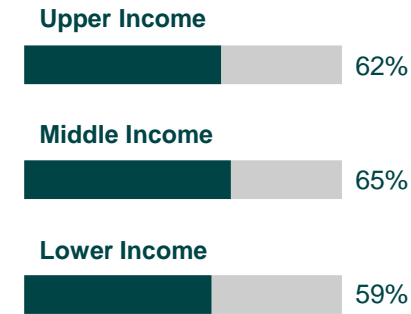
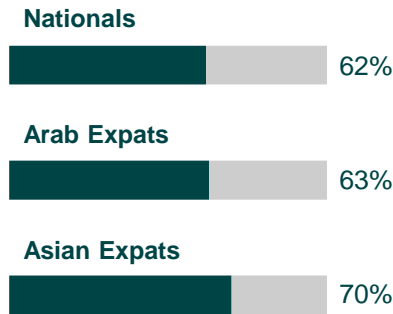
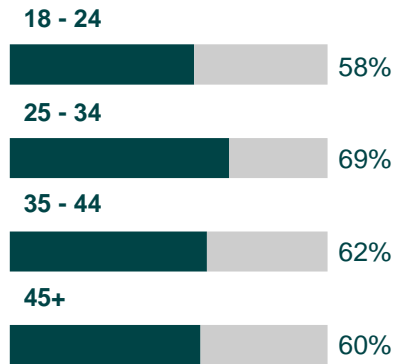
## By Nationality



## By Income Level

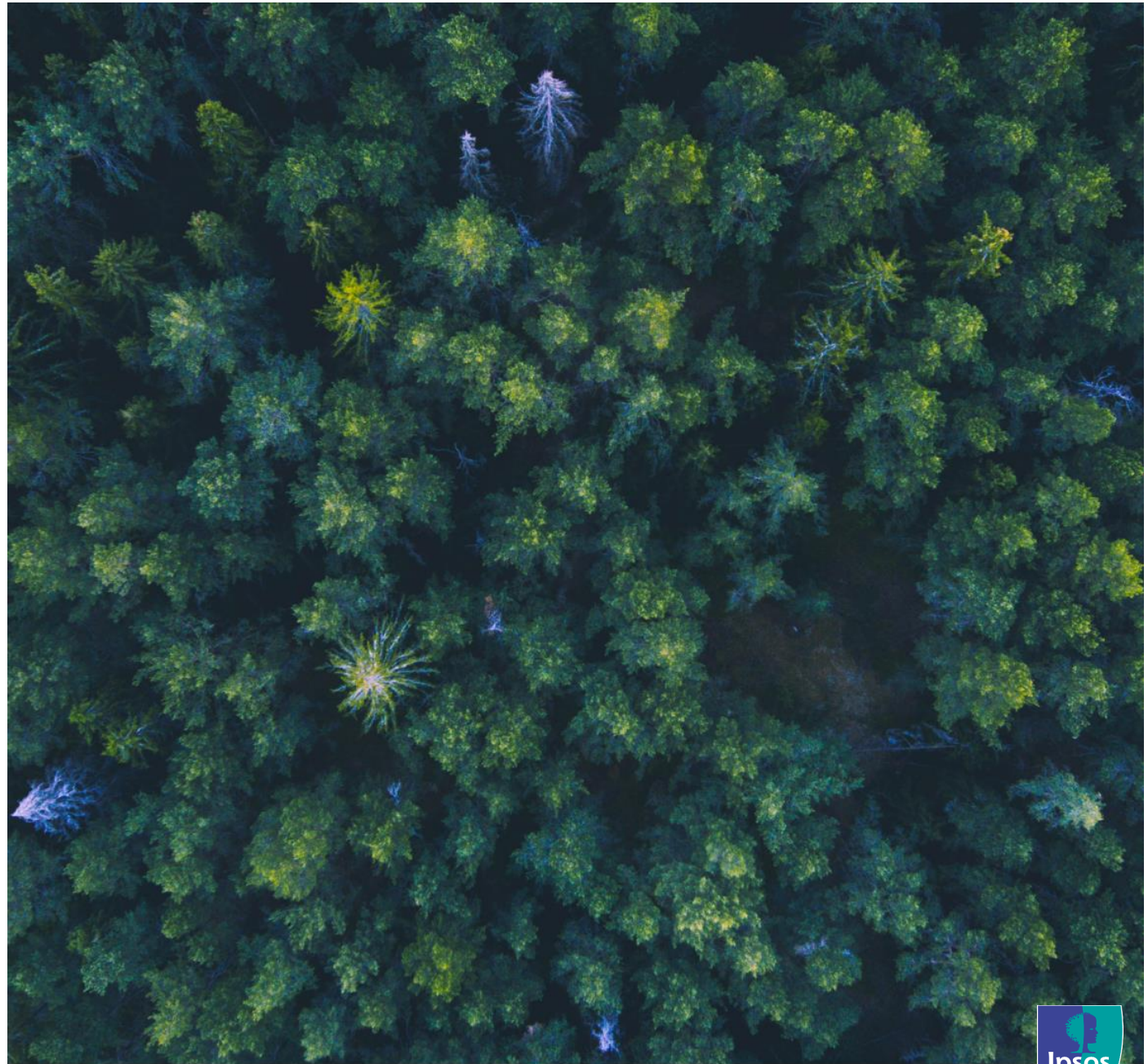


Are Not Sure What They Can Do To Make A Difference When It Comes To Climate Change



# METHODOLOGICAL NOTES

- 500 Online Interviews
- Nationally Representative
- Males & Females
- 18 Years & Above
- Nationwide Coverage





# FOR MORE INFORMATION:

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**GAME CHANGERS**

