



IPSOS FLAIR COLLECTION

QATAR 2026

ROOTED IN HERITAGE, REACHING FOR TOMORROW:
QATAR'S TRANSFORMATIVE JOURNEY



EDITORIAL



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Ipsos Flair is expanding its presence in MENA with Qatar as a new entrant to the scope of this analytical approach aimed at better understanding society's mindset to help and support our clients' strategies.

In just a few decades, Qatar has undergone a remarkable metamorphosis. Today, it stands as one of the world's wealthiest economies and most influential nations; GDP per capita in Purchasing Power Parity (PPP) is estimated at approximately \$116,250, ranking it 3rd globally. Qatar's population numbers nearly 3.2 million inhabitants, of whom majority are foreign nationals, living primarily in Doha, which showcases the most spectacular architectural achievements and contributes significantly to the country's international standing. Compared to other nations, particularly in Europe and Asia, Qatar is a young country with a median age of 33.4 years, another factor explaining its dynamism and vitality. These demographic dimensions work in Qatar's favor at this stage of its history and its forward projection, precisely when the country seeks to accelerate its transformation, despite concerns over the possible consequences of the recent regional conflict.

Beyond being an economic powerhouse, Qatar has established itself as a major player on the world map in fields as diverse as diplomacy, premium real estate investments, media, hospitality, sport and as a host for major global events.

Within this context and shaped by the aspirations and guiding principles in Qatar National Vision 2030 (QNV2030), Qatar made substantial strides across all pillars covering economic, human, social, environmental and institutional development, and following a very focused plan as articulated in The Third Qatar National Development Strategy (QNDS3), which established the strategic priorities and overarching framework for the next period of the nation's impressive development from 2024-2030, a period that people in Qatar are moving through with an upbeat mood, with **92% expressing optimism about the future.**

From this perspective, Qatar presents a very impressive story that we invite you to explore.

Enjoy your reading!



Qatar, a nation experiencing one of the world's most rapid transformations while deliberately preserving the cultural bedrock that defines its identity. As articulated in the Qatar National Vision 2030, the country now stands at a critical crossroads: managing prosperity derived from hydrocarbon wealth while preparing confidently for a post-oil future driven by knowledge, innovation, and human development.

What makes Qatar particularly compelling for understanding contemporary national mood and social dynamics are the five profound tensions it must balance:

- Modernization versus tradition
- Meeting current needs versus safeguarding intergenerational equity
- Managed growth versus unchecked expansion
- Economic ambitions versus demographic identity
- Economic development versus environmental stewardship

These challenges create a unique social laboratory, one where culture meets cutting-edge development, where world-class aspirations coexist with deeply rooted values, and where the pursuit of global competitiveness is balanced by a profound commitment to sustainability, community cohesion, and heritage preservation.

Across this landscape, the nation's mood emerges as a blend of extraordinary optimism and thoughtful caution. It is a society racing to diversify its economy, build knowledge-based industries, and establish itself as a regional hub, while ensuring its children inherit not just wealth, but also wisdom, values, viable opportunities, and the sense of belonging that binds generations. This delicate balance between ambition and authenticity, between global integration and cultural preservation, makes Qatar an essential study in how nations navigate modernity without losing its culture and heritage.





Edouard MONIN
Chairman and CEO
of Ipsos in MENA

“Qatar has established itself as a decisive force in the region: innovative, forward-looking, and increasingly influential on the global stage. It is a nation moving forward with purpose while remaining anchored in who it is, and its evolution resonates far beyond its borders, shaping regional dynamics and inspiring new possibilities. This role is further reinforced by Qatar’s position as a key regional mediator and an increasingly recognized focal point for dialogue, contributing to constructive engagement across the region.

At Ipsos, we fully recognize the significance of Qatar’s transformation and the influence it holds, and we are proud to be part of this journey. Our presence in Qatar enables us to stand alongside its institutions and businesses as they seek to understand Society, Markets, and People with greater depth and precision.

As Qatar advances toward its long-term ambitions, Ipsos remains a committed partner, contributing expertise, evidence, and perspective to support the country in shaping its future.”



As we step further into Qatar’s unfolding narrative, the reflections of our leadership help frame the spirit of this edition.

Edouard Monin,
Chairman and CEO of
Ipsos in MENA, shares:



Panicos IOANNIDES,
CEO of Ipsos in GCC

“Qatar today stands as one of the most dynamic countries in the Gulf, a country whose influence increasingly extends beyond its borders, shaping regional priorities in development, innovation, and societal progress. Few nations have navigated rapid change with such clarity of purpose. Qatar not only keeps pace with global transformation; it sets benchmarks for the region by investing boldly in knowledge, culture, infrastructure, talent, and long-term resilience.

From the GCC perspective, Qatar plays a pivotal role in accelerating the region’s transition toward diversified, future-ready economies. Its ability to move quickly while remaining anchored in its identity has positioned it as both a stabilizing force and a catalyst for collective advancement.

At Ipsos, we are proud to stand alongside a nation that approaches progress with intention and vision. Our work in Qatar allows us to contribute to a journey that is reshaping the region, a journey defined by data-driven decision-making, strategic foresight, and an unwavering commitment to building a prosperous future for generations to come.”



These reflections continue through the voices of our regional and local leaders, each bringing a unique lens to Qatar’s momentum and to the partnership Ipsos nurtures within the country.

Panicos Ioannides, CEO of
Ipsos in GCC, adds:



Bahaa BARAKAT
Managing Director
of Ipsos in Qatar

"At Ipsos in Qatar, we have the unique opportunity to directly engage on a daily basis with the society and various organizations in the country, experiencing firsthand and celebrating every milestone and achievement from worldclass events, impressive tourism offerings, a welcoming and rapidly developing business environment that touches every sector of the economy, accompanied by a best-in-class quality of life for citizens and residents, all of whom call Qatar home. We are proud to witness and contribute to a nation defined by ambition and world-class achievements. Qatar is not a simple extension of the past, it's a bold vision for the future.



For **Bahaa Barakat**, Managing Director of Ipsos in Qatar, this nation embodies a rare combination of purpose, resolve, and vision, a place where transformation is not only pursued, but lived every day. He states:



"Qatar is a nation moving forward with purpose while remaining anchored in who it is, and its evolution resonates far beyond its borders, shaping regional dynamics and inspiring new possibilities.

Edouard MONIN
Chairman and CEO of Ipsos in MENA

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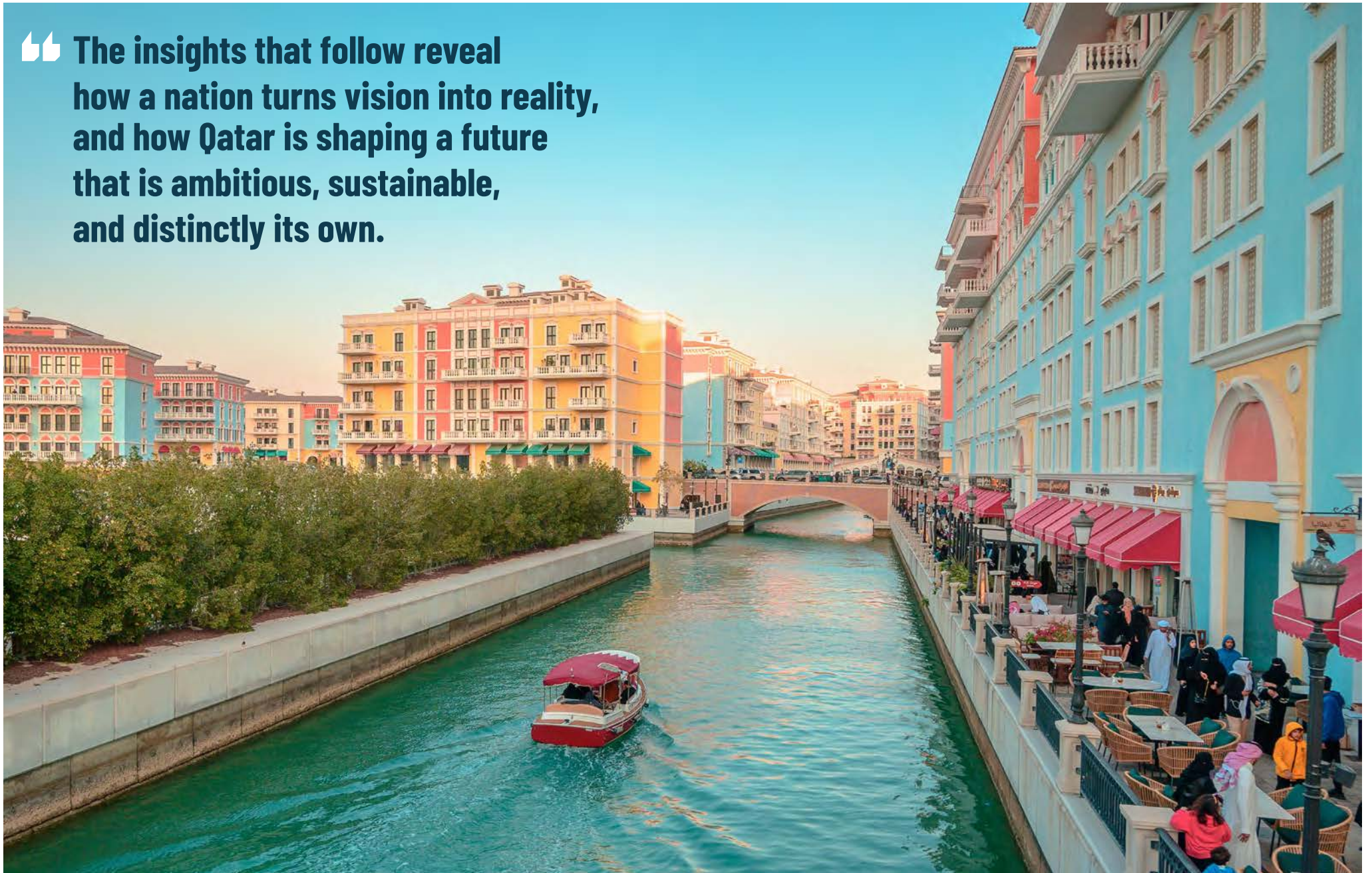
In bringing these voices together, a fuller portrait of Qatar emerges: a nation that dreams boldly, acts decisively, and evolves with remarkable clarity of purpose. The perspectives shared here reveal a country entering a pivotal phase of its journey, one where ambition is accelerating and where choices made today will define its trajectory for decades to come.

Qatar now stands in a moment shaped by urgency and possibility: translating prosperity into productivity, refining its national priorities, and preparing its institutions and people for the next wave of transformation. What distinguishes this chapter is not only the scale of change, but the maturity with which the nation approaches it, placing human development, environmental responsibility, economic resilience, and technological readiness at the center of its evolution.

The pages that follow step into this decisive moment, exploring Qatar's final sprint toward 2030 through the lenses that matter most: its economy and finances, its environmental commitments, its social dynamics, its rapid technological transformation and views on AI, and the lessons drawn from both its past and its horizon of future possibilities.



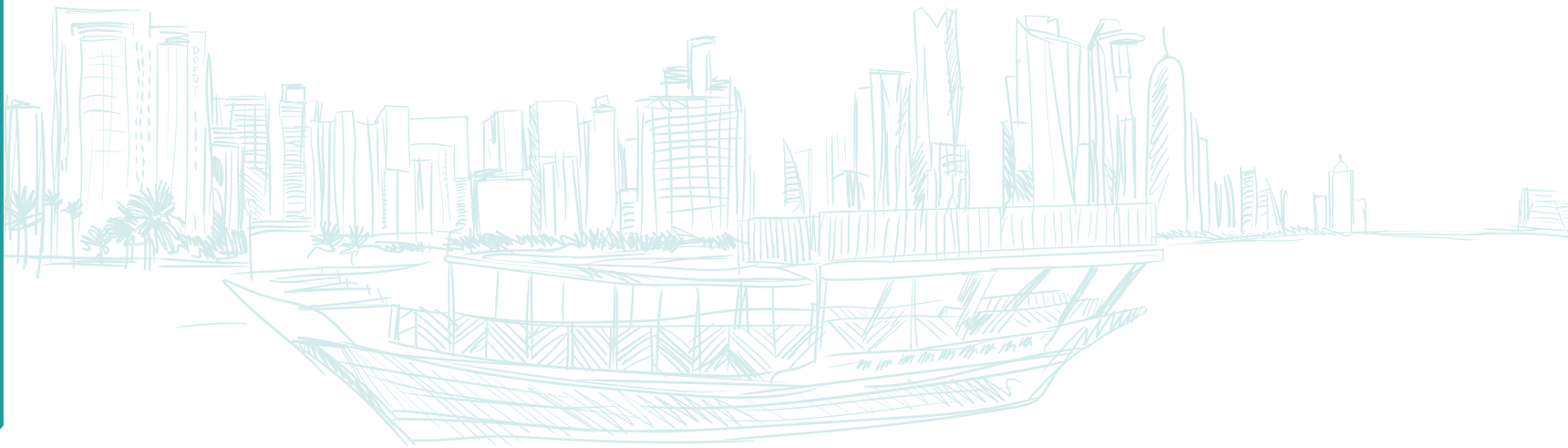
▮▮ The insights that follow reveal how a nation turns vision into reality, and how Qatar is shaping a future that is ambitious, sustainable, and distinctly its own.





**FROM VISION TO
TRANSFORMATION:
QATAR'S FINAL SPRINT
TOWARD 2030**

Qatar's journey from the Qatar National Vision 2030 (QNV30) to its Third National Development Strategy (NDS3) reveals a nation at a critical inflection point, moving from laying foundations to executing transformative change. This evolution offers unique insights into the collective mood and aspirations of a society navigating unprecedented transitions.



The Evolution of Challenges

While QNV 2030 identified five fundamental tensions Qatar must balance, NDS3 reveals how these have crystallized into seven concrete national outcomes. The original challenge of «modernization versus tradition» has evolved into a more nuanced pursuit of a «cohesive society» that preserves values while thriving in a globalized world. The demographic challenge has transformed into creating a «future-ready workforce» where Qataris increasingly participate in private sectors while attracting high-skilled international talent as long-term partners.

From Prosperity to Productivity

Marking a decisive shift in Qatar's economic philosophy, NDS3 now commits to specific targets: 4% annual GDP growth, doubling R&D expenditure, and achieving top-10 global rankings in business environment. This represents a fundamental reorientation from resource-based prosperity to productivity-driven growth, with labor productivity targeted to grow at 2% annually.

The Urgency of Transformation

NDS3's frank acknowledgment that «the costs of Qatar's current development model are high with the potential to escalate.» This candid assessment reveals a society ready to confront difficult truths - that government employment cannot indefinitely absorb new Qatari graduates, that low-skilled labor models threaten sustainability, and that incremental change is no longer sufficient.

The Human Dimension

Perhaps most revealing for understanding Qatar's national mood is the Strategy's emphasis on quality of life and social cohesion. The specific targets - from achieving an 82.6-year life expectancy to maintaining a 3.0 fertility rate, from reaching 10% volunteering participation to ensuring 30% of people with disabilities are economically active - reflect a society deeply concerned with collective wellbeing alongside economic success.

The Implementation Mindset

Through NDS3, Qatar adopts a more pragmatic, execution-focused approach. The three-phase implementation roadmap (2024-2025 for foundations, 2026-2027 for scaling, 2028-2030 for acceleration) suggests a society that has moved from dreaming to doing, from planning to performing.

This transition from vision to strategy reveals Qatar's evolving national psychology: from confident ambition to determined execution, from managing abundance to creating sustainability, from preserving identity to actively shaping it for a globalized future.

Through Ipsos Flair, we explore a society that is balancing urgency with authenticity, ambition with realism, in a complex world where Qatar and its society are much larger than its size on the world map.





**REACHING FOR TOMORROW
WITH A FLAIR
OF OPTIMISM**

85%

say that the economic environment for investment in Qatar will continue to improve and develop

86%

believe that Qatar will continue to attract more international investments

81%

expect that more tourists will progressively continue to visit Qatar

believe that Qatar will continue to attract more international investments



A NATION UNITED IN CONFIDENT EXPECTATION

FROM AMBITION TO CONVICTION

People in Qatar have internalized the NDS3 mindset, with

93%

expressing confidence in Qatar's economic growth and positive outlook.

This is not merely optimism; it reflects a society that has witnessed transformation into reality. From the infrastructure surge preceding the World Cup to the diversification initiatives now taking root, residents have evidence that Qatar delivers on its promises.

Despite being in a tough region, that is experiencing significant geopolitical challenges, people in Qatar are very bullish on the country, viewing it as a proven success on the global stage and now expect the world to keep coming.



INDIVIDUAL OPTIMISM ANCHORED IN NATIONAL MOMENTUM

People in Qatar display what can only be described as confident realism: clear-eyed about challenges yet assured in positive outcomes; aware of risks yet trusting in both institutional response and personal capacity to adapt. This is not a complacent satisfaction of prosperity, but the confident expectation of a population that has witnessed national promises become reality.

“ I am optimistic about the future
92% ”



Supported by a **well-being consensus**, with near parity between mental and physical health optimism, viewing physical and mental health not as separate concerns but integrated expectations, and nearly **9 in 10** expecting their well-being to improve.

As well as **financial pragmatism**, where confidence meets caution, with nearly **8 in 10** respondents expecting their personal financial situation to improve. While lower than personal well-being expectations, it still represents a strong majority expecting improvement—a notable finding in a global context marked by economic uncertainty.

 **87%**

My mental health will improve

 **88%**

My physical health will improve

 **78%**

My personal financial situation will improve



ENVIRONMENT: AWARENESS WITHOUT PARALYSIS

CLIMATE REALITY ACKNOWLEDGED

The data reveals a population with clear-eyed recognition of environmental challenges.

Bringing the idea home, is a belief that more extreme weather events will occur in Qatar in 2026, as stated by 66% of respondents.



79%
agree that average
global temperatures
will increase

This view represents climate awareness in a society that is balancing between development and sustainability; understanding that climate change is not an abstract future, it's a reality that requires adaptation now.



THE TECHNOLOGY BET & THE INDIVIDUAL MANDATE

A breakthrough in technology will halt climate change, is a belief held by

Understanding the role of the individual supporting the environment,

56% of respondents.

This uncertainty suggests pragmatic hedging. Residents aren't waiting for a miracle; they're acknowledging uncertainty while hoping for breakthroughs.

73% believe people will prioritize sustainable practices in their daily lives.

This figure bridges the macro and the micro, connecting global climate awareness (79%) to personal behavioral change (73%). The 6-point gap is remarkably narrow, suggesting that residents don't see sustainability as someone else's responsibility.



ARTIFICIAL INTELLIGENCE: BEYOND THE HYPE

FROM AWARENESS TOWARDS UNDERSTANDING

A telling finding emerges in Qatar's Artificial Intelligence landscape, where awareness is widespread, yet fewer people truly understand what it is or which products and services employ it.

The gap is a natural response to velocity. AI's evolution outpaces the public's ability to keep up, creating what might be called a "knowledge debt that accumulates with each new development. Technology moves faster than understanding can follow, which creates multiple questions and considerations to think about.

THE SENTIMENT SPECTRUM: NEITHER EUPHORIA NOR PANIC

The emotional landscape around AI reveals a mature ambivalence, not the breathless enthusiasm of early adoption, nor the reflexive rejection of technophobia. People recognize AI's permanence, beyond a trend, and its ability to improve our world.



4 in 5



Believe AI is more than a trend

50%

Express caution/
concern about danger

1 in 3



View AI positively

3 in 5



Believe AI will ultimately
improve our world

THE CONCERN FOR AUTHENTICITY: WHEN REALITY BECOMES UNCERTAIN


83% believe most people will struggle to distinguish real content from AI-generated content by 2026.

This is not a distant concern; it's an imminent epistemic challenge. In a society that preserves values while thriving in a globalized world, the inability to trust what one sees and reads becomes a concern.



THE PRIVACY RECKONING AND TRUST DEFICIT

In a region where privacy carries cultural weight—where family reputation and personal discretion are deeply valued—this near-universal distrust represents a significant challenge. When only 21% trust corporate data stewardship, the social license for AI-driven services becomes fragile.

 **79%**
AI will increase risk
of personal data exposure

Only **21%**
Believe companies
will protect their
personal data

THE EMPLOYMENT PARADOX: CREATION AND DESTRUCTION SIMULTANEOUSLY

The data reveals a society holding two seemingly contradictory beliefs:

 **63%**

AI will lead to many new
jobs being **created**

 **69%**


AI will lead to many
jobs being **lost**

This is not cognitive dissonance; it's a sophisticated understanding. People grasp that AI represents economic transformation, not simply growth or decline. The 6-point gap, more expecting losses than gains, suggests cautious realism.

THE REGULATORY EXPECTATION: TRUST IN GOVERNANCE

Unlike societies where technology regulation is contested, residents here expect government intervention and are likely to welcome it.

This expectation aligns a society trusting authorities to manage AI's risks with the same determination applied to economic transformation.

 **69%**
expect the government to
introduce strict rules for large
technological companies

An aerial night view of a modern city skyline, likely Doha, Qatar. The image features numerous illuminated skyscrapers and high-rise buildings, with light trails from traffic on highways below. The scene is dominated by warm yellow and orange lights from the buildings and streets, contrasted with the dark night sky. A prominent building in the foreground has a curved facade with blue-tinted lighting. The overall atmosphere is one of a vibrant, futuristic urban environment.

**A SOCIETY READY
FOR ITS FUTURE**

Qatar stands at the threshold of 2030 not with anxious uncertainty, but with confident realism. A national psychology forged through delivered promises and tested by acknowledgment of challenges ahead.

The **93%** who believe in economic strength and the **92%** who expect better personal years are not passive optimists; they are also people who recognize that AI will displace jobs (69%), that climate impacts will intensify (66%), that digital life may erode face-to-face bonds (76%), and that distinguishing truth from fabrication will become increasingly difficult (83%). This is a society that holds both conviction and caution simultaneously trusting national direction while understanding that the pathway from resource-based prosperity to productivity-driven growth demands personal adaptation, institutional protection, and genuine transformation.

The consistent gaps between macro confidence and micro pragmatism reveal a population that has internalized NDS3's central truth: that incremental change is no longer sufficient. Yet rather than paralysis, this awareness produces determined agency.

“**The final sprint toward 2030 is not a leap of faith, that could be shaken by short term events; it is a march of earned confidence.**”



ABOUT IPSOS

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

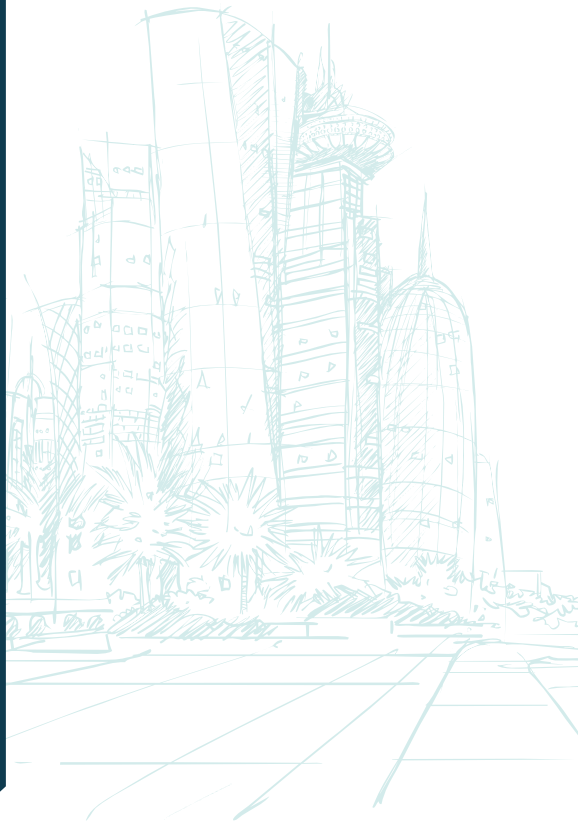
Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices and is eligible for the Deferred Settlement Service (SRD).

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IPSOS FLAIR:

UNDERSTAND TO FORESEE

Launched in 2005, Ipsos Flair is based on the observation that thousands of pieces of information are produced and analysed every day by Ipsos. But what happens to them after the presentation of results, the delivery of the report, the decision-making by clients? This information reflects a society and an era, values, beliefs...

Ipsos works on everything that is at the origin of motivations and choices of consumer-citizens, that is, everything that determines and organises their decision-making processes. Building loyalty, tracking infidelity, also means identifying the drivers behind public opinion biases and tensions.

This is the challenge of Flair: to consider the results of studies as sociological symptoms to define a mapping of trends, both structural and emerging. Each study theme is an opportunity to identify the adjacent concerns of consumers: talking about a brand, a service or a medium, a candidate in an election, etc., is also talking about life itself, feelings, and convictions.

By bringing intelligence to the measured flows, going beyond conducting studies, we show that all our data are subject to inventory and subject to invention.

Incidentally, why 'Flair'? Intuition, daring, curiosity, gut instinct, foresight.... In sport, it's a daring style of play, risk-taking, panache, and the recognition given to the winner.

Ipsos Flair is present in Brazil, Chile, China, Colombia, France, India, Indonesia, Italy, Ivory Coast, Japan, Morocco, Mexico, Peru, Russia, Saudi Arabia, South Korea with other countries to follow.

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