



**GLOBAL
TRENDS**

IPSOS GLOBAL TRENDS
MENA EDITION

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Contents



**GLOBAL
TRENDS**

INTRODUCTION

Welcome to Ipsos Global Trends – *MENA Edition*

The 2024 Ipsos Global Trends report, "In Search of a New Consensus: From Tension to Intention," marks the tenth anniversary of this study. Based on over 50,000 interviews across 50 markets, representing 75% of the global population and 90% of global GDP, the report offers an unparalleled view of evolving public attitudes and values. It identifies nine key global trends, exploring both the continuities and shifts in societal sentiment over the past decade.

The report reveals three key tensions that have intensified over the last ten years and three constants that shape people's perceptions of the world. Understanding these tensions and intentions is crucial for navigating the future and identifying opportunities for brands and policymakers alike.

While the global report provides a comprehensive overview, our MENA-focused analysis delves into the specific nuances of the region. It examines how global trends manifest differently within the MENA context, providing valuable insights for businesses and organizations operating in these markets. The MENA region exhibits unique characteristics that influence its response to global trends, requiring a tailored approach to understanding consumer behavior and market dynamics.

Our analysis focuses specifically on Saudi Arabia, the UAE, Egypt, and Morocco, providing tailored insights characterized by our unique region.

How we built the Trends for this edition

Our framework is a product of collaboration between Ipsos colleagues across nearly 90 markets using Ipsos' Theory of Change – a model for exploring how **Macro Forces** (the external context against which people and organisations act), **Shifts** (changes in attitudes and values across society, markets and people) and **Signals** (visible real-world expressions of change observed at local and more surface levels) pull and push one another, interact and cause tension, and ultimately allow us to identify trends.

At Ipsos, our curiosity about society, markets, and people is what drives us – so at the heart of our trends sits the largest public survey in Ipsos history of

over 50,000 interviews, resulting in over five million data points. We used advanced analytics to identify **23 human values**, that to a lesser or greater extent, unite humans across the globe. These sit at the heart of our robust and reliable data driven framework.

In this report we also explore and present Signals and outline our updated Macro Force Framework. Equipped with this context, we have subsequently identified nine global Trends – which you can read at a glance on the next page.

GLOBAL TRENDS

Globalisation Fractures

Splintered Societies

Climate Convergence

Technowonder

Conscientious Health

Retreat to Old Systems

Nouveau Nihilism

The Power of Trust

Escape to Individualism



Ipsos Global Trends at a glance

Globalisation Fractures

While the world remains highly interconnected, globalisation is seen as having winners and losers, both at the market level and personally. Focus on playing up local strengths as well as global cooperation and scale.

Splintered Societies

Rising inequality leads to a splintering of traditional structures with new ideologies and political allegiances emerging. People feel that businesses and governments need to do more. Focus on commitment to our many shared values worldwide to help lower temperatures at home.

Climate Convergence

Worldwide investment in climate resilience and mitigation is rising,

as the impacts of climate change become more evident. Focus on demonstrating commitment at the organisation and market level, but also help people feel that they are contributing, too.

Technowonder

As technology becomes more pervasive, there is a tension between excitement for all the problem-solving tools, connection and entertainment technology can bring us and concerns about privacy, job loss and potential for misuse. Focus on identifying the benefits and reducing concerns.

Conscientious Health

Health understanding is more holistic, tied to both our physical and our mental wellness. Tensions persist in terms of who has access to care. Focus on

helping people navigate this ever more complicated landscape with clear, trusted information and accessible solutions.

Retreat to Old Systems

As an escape to nostalgia is widely appealing, some people also yearn to revert to historical power structures around religion, politics, gender and more. Focus on the positive aspects of the past but realise that not everyone wants to return to it.

Nouveau Nihilism

As economic stresses are preventing many from realising their long-term dreams, a sometimes- but-not-always-fatalistic “live for the moment” attitude is rising. Focus on helping people bridge the gap between their aspirations and their realities.

The Power of Trust

As we are bombarded with information, we crave authentic messages from trusted sources but have a harder time figuring out who and what to believe. Focus on aligning your shared values with those of your audience to build trusted relationships.

Escape to Individualism

As the world feels overwhelming, people are focusing on one thing they can control – themselves. But there’s a tension between those who strive for stature and those who focus more inward. Focus on leveraging trusted relationships to help people express their identities as they choose, even if they choose historical norms.

Executive Summary – MENA

The unique socio-cultural and economic landscape of MENA shapes how global trends manifest in the region. While many of the same macro forces—digitization, individualism, sustainability, and shifting societal values—are evident worldwide, MENA consumers respond to them in ways deeply rooted in their cultural, economic, and historical context.

Compared to global trends, MENA exhibits a stronger duality between modernity and tradition. While global consumers increasingly embrace individualism, MENA respondents continue to place high value on community, family, and collective well-being, even as personal autonomy becomes more desirable.

The need to balance self-expression with cultural norms creates a nuanced approach to change, where heritage is not abandoned but rather adapted into modern lifestyles. This is particularly evident in the region's embrace of nostalgia-driven branding, the revival of traditional design and values in contemporary business, and the emphasis on trust and authenticity in consumer relationships.

Additionally, economic uncertainty and rapid change have heightened consumers' desire for stability and transparency. Trust is a defining factor in purchasing decisions, with local brands and institutions expected to uphold authenticity, fairness, and cultural alignment. Compared to Western markets, where skepticism towards corporations is on the rise, MENA consumers still seek strong brand relationships but demand accountability and social responsibility in return.

At the same time, digital transformation is accelerating in the region, often surpassing global adoption rates. MENA consumers are highly engaged in online ecosystems, yet they navigate digital overload with caution, balancing convenience with a need for real-world connection. While global trends lean toward hyper-personalization and data-driven engagement, MENA consumers expect brands to offer both efficiency and a human touch, as seen in the blending of digital and in-person services.

Sustainability remains an emerging, yet complex, priority. While global markets push aggressive green agendas, MENA consumers balance environmental

concerns with affordability, practicality, and regional infrastructure limitations. As a result, brands in the region must find ways to make sustainability both aspirational and accessible.

Ultimately, MENA is neither simply following nor resisting global trends—it is adapting them through a unique lens. The interplay between rapid modernization and cultural continuity defines how businesses must engage with consumers, ensuring that innovation aligns with the region's distinct values, expectations, and aspirations.

**GLOBAL
TRENDS**

TRENDS & FRAMEWORK INTRODUCTION

Our Trend Framework

Our analysis has identified nine Trends, and 23 Values that tell the story of what it's like to be human in 2024.

The big picture is more forbidding than it was previously – the international global order and our national societies both appear to be under immense pressure, while climate change has become a pressing enough threat to unite much of global opinion.

Technology is moving at a far faster pace than ten years ago. It is acting as an accelerant of further progress, bringing wonder and worry in near-equal measure.

The responses we see from people are a turn inwards, focusing on the issues we feel we can most easily control, such as our health.

Some seek sanctuary in the warm glow of nostalgia for an imagined past, or by trying to remake the world to be more like it was before. Others simply shrug their shoulders and focus on living in the moment.

This has two important impacts: a more **uncertain world for brands** which are expected to align with individuals' divergent worldviews but also continue to deliver quality products and customer service.

For individuals, intentionality, **autonomy and self-control become the new status symbols** as evidence that we can shape our own destinies in a more complex and unpredictable world.



The contradictory world of human opinions

Tensions exist within each of the trends of course. Humans are complicated and all of us are capable of holding conflicting ideas at the same time. Psychologists call this “cognitive polyphasia”.

For example, while the majority believe that **technology is destroying our lives**, a larger majority think that only modern **technology can solve our future problems** (71%). Understanding these tensions helps us see why people behave differently in similar situations and gets at the rich nuances of human motivation.

Some tensions are generational within countries, some cross borders. Tensions about gender do both: eight in ten people in Pakistan agree that women's **main role in society is to be good mothers and wives**, but only 13% in Portugal, and under 20% in Sweden and Ireland say the same.

Businesses and organisations must learn how to navigate this complexity: global organisations face unique challenges. National ones can deal with one set of tough challenges, while global businesses have to navigate much more diverse situations.

There is widespread agreement that **brands can do good things for the world and make money** and that **businesses have a “duty” to do good things for the world**. However, trust that business will achieve these “win-wins” is lower, with eight in ten thinking there needs to be **more government regulation of corporate environmental impacts**. A similar number think “**we are heading toward environmental disaster**” if we do not change our habits quickly.

Over the past decade we have seen double-digit increases in the proportion of people saying they **tend**

to buy from brands that reflect their personal values. In fact, every core market shows an increase compared with ten years ago. Yet half also say they **do not care about a brand's social or ethical responsibility, so long as they make good products**. How is a brand or a policy maker supposed to navigate supporting people's values, when such values are so internally and externally conflicted?

People might not see the idiosyncrasies in their own attitudes, but they see the conflict and tension around them.

Three in four say they see more conflict between people who do not share the same values in their nation, and almost half see it in their own families.

How does a leader lead in this environment and balance all the tensions?

Our nine Trends cover a broad range of contexts from geopolitical to deeply personal. That is relevant because people — your customers, citizens, audience, and patients — are dealing with issues across those dimensions, too.

Our closing Trends take us from the global to the human level. In response to the chaos people see in the world around them, we see a flourishing of individuality and an inward focus. As *the world* spins out of people's control, they want to lean into controlling *their world*: their physical and mental health, their identity, their data. So understanding the values that drive people is crucial.

A unique opportunity to understand human values

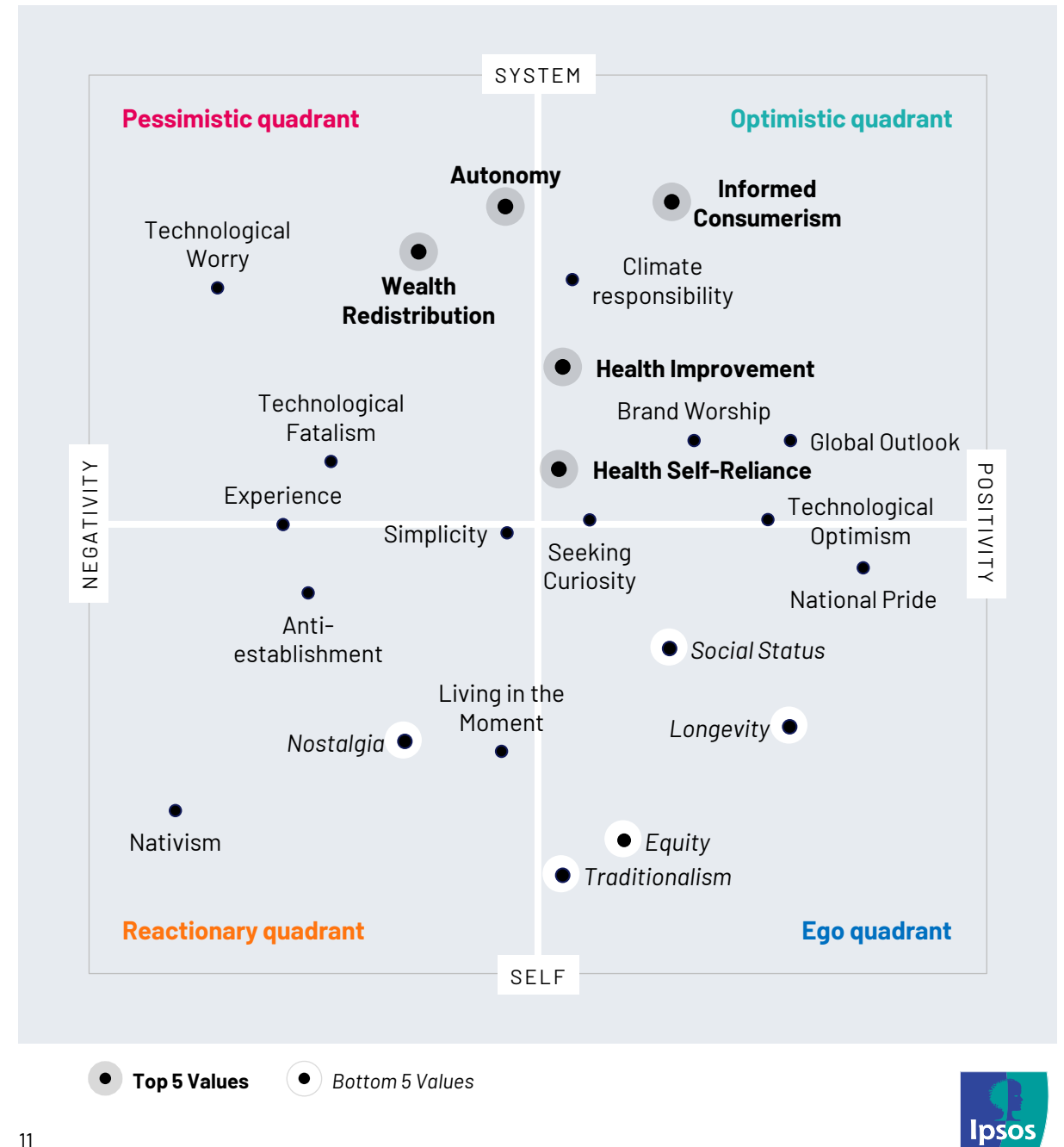
Asking questions about what it means to be both citizen and consumer across 50 markets, we can use statistical analysis to uncover hidden connections and new relationships between people's attitudes.

Our analysis has surfaced 23 human values – each compromising a set of strongly correlated questions. By presenting these on a map, we can start to understand how closely aligned people's values are. The further apart two values are – for instance, Nativism and Global Outlook – the less likely a single person might be to hold both values.

We have plotted the values onto four quadrants, oriented towards the system (top half of the map) or the self (bottom half of the map), and between a negative or positive reaction to today's world (left to right parts of the map).

The five most intense values that unite humans globally (highlighted in bold) are in the system part of the map but balanced between optimism and pessimism. The five least intense values – those that are less likely to unite humans around the world (highlight in italics) – are all in the bottom half of the map. While these are less intense, they may show signs of greater growth in the future and need careful attention.

The 23 values that underpin our nine Trends support a more intimate understanding of each, making our framework more actionable for you.



Globalisation Fractures

Trend: Perceptions of globalisation have improved in many markets around the world over the past decade. While the world remains highly interconnected, the geopolitical environment has grown more contested. Increasingly, political leaders are asserting the primacy of their nation and its allies.

Trend in MENA: Similar to global perceptions, Globalization in the MENA region is met with optimism on both a national and personal level.

Tension: Despite the development of a more positive view on the impacts of globalisation, geopolitical headwinds are promoting a focus on one's nation especially in MENA, where there's an emphasis on blending global and local influences.

Takeaway: Even global brands can and should play up their local ties — while also highlighting the benefits of their scale. In MENA, brands are already increasingly tailoring their offerings to align with local cultural preferences.



Values

Global Outlook
National Pride

Beyond peak globalisation

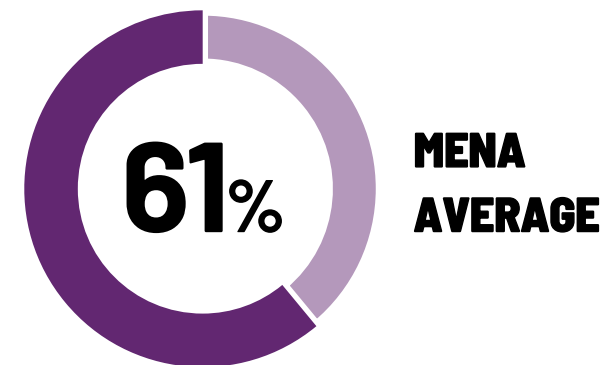
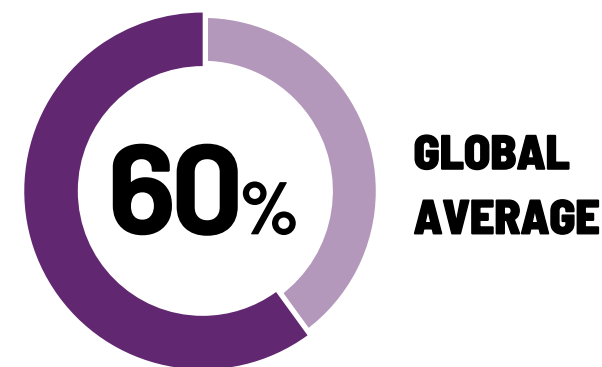
The biggest tension in this trend is between slow improvements in how globalisation is perceived by the public and the tenor of international political debate as conflicts persist.

Similarly, in the MENA region, the main tension revolves around the balance between widespread optimism about globalization's benefits and a growing preference for local brands. Many in the region view globalization positively on both personal and national levels. National optimism is shown by a strong belief in business leaders' ability to navigate the challenges of globalization. This contrasts with skepticism found in other parts of the world, where trust in leadership is lower.

Globally, one of the key factors influencing public perception is the changing dynamics of the middle class, which is shrinking in some regions while expanding in others. These shifts are often linked to the effects of globalization, as economic opportunities and challenges reshape societal structures and lead to shifts in opinion. This transformation is further accentuated by the rebirth of industrial strategies and stimulus efforts, which have prompted countries to seek national champions in strategic sectors. These activities reflect broader economic shifts and highlight the complex interplay of globalization with local economic policies.

In the MENA region, optimism about globalization coexists with varying degrees of caution. The growing trend of 'glocalization,' where global brands integrate local cultures, highlights the complex interplay between global influences and local identity, which brands must adeptly navigate.

agree "Globalisation is good for me personally"



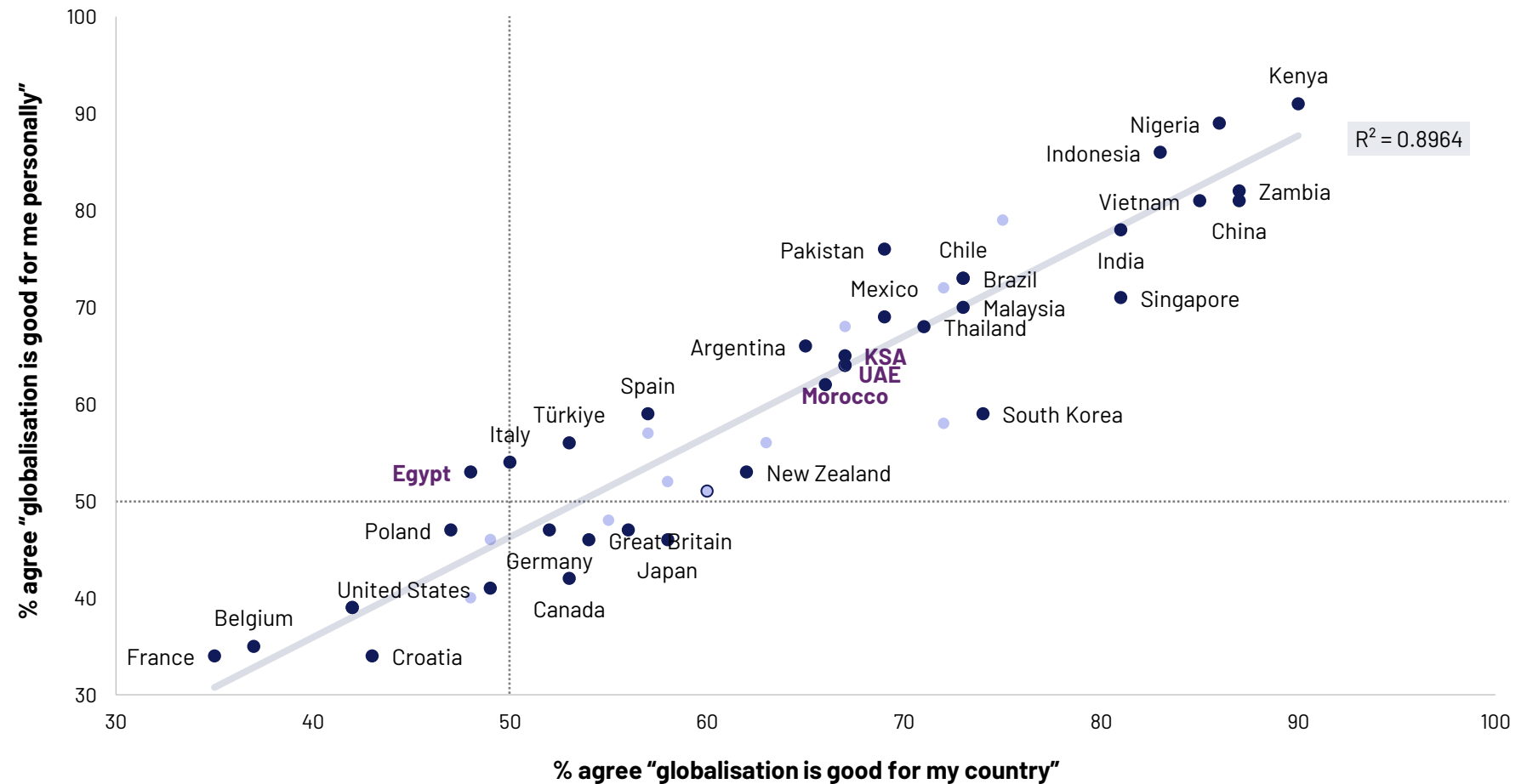
Globalisation: good for me and the country?

Perspectives on the benefits of globalisation, for the self and for the country, march in lockstep. Nearly all citizens see globalisation as one tide that lifts — or sinks — all boats.

All nations where a minority say globalisation is good for either the self or society are European or North American. The French are the least enthused (although support has risen over the past decade) alongside the Belgians and Croatians. Even the United States, a huge beneficiary of globalisation at a market level, has public scepticism about it and fits into this double negative category.

By contrast, it is emerging markets that are the most positive — the public in Nigeria, Kenya, Indonesia, Zambia and China, among others, are the most enamoured.

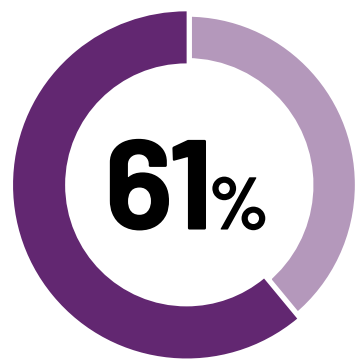
Globalisation is good for me vs. good for my country



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. Selected markets labelled. For full methodology see ipsosglobaltrends.com.

Source: Ipsos Global Trends 2024

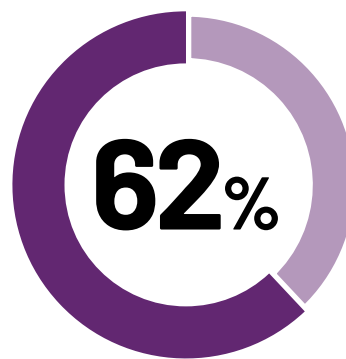
Navigating Perspectives on Globalization in MENA



agree
"Globalisation
is good for me
personally"

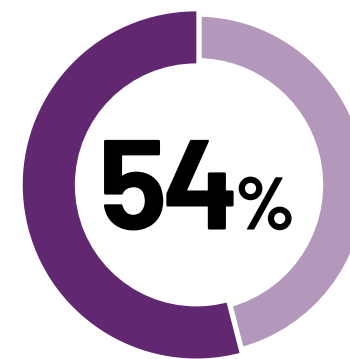
While the MENA region generally views globalization's personal benefits positively, certain countries stand out above the global average. In **Saudi Arabia**, 65% of individuals feel personally benefited, showcasing a strong sense of gain. Both **Morocco** and the **UAE** reflect similar optimism, with 64% of individuals surpassing global benchmarks.

Conversely, **Egypt** shows more caution, with only 53% perceiving personal benefits, aligning more with views observed in Western countries.



agree
"Globalisation
is good for my
country"

The perception of globalization's impact on national economies is notably optimistic, with certain countries surpassing the global norm of 64%. **Saudi Arabia** and the **UAE** both see 67% of their populations affirming the benefits of globalization for their nations, echoing sentiments found in other high-growth markets. On the other hand, **Egypt** presents a more reserved outlook, with just 48% recognizing such benefits, aligning more with skepticism observed in developed nations.



agree
"I trust business
leaders to tell the
truth"

High confidence in business leaders significantly stands out in the MENA region, where trust levels exceed the global average of 44%. In **Saudi Arabia** and the **UAE**, trust is notably high, with 63% and 59% expressing confidence, respectively. This sharp contrast with global averages reflects MENA's favorable view of leadership in navigating globalization's complexities. While this may be true for GCC markets, countries like **Morocco** present a more skeptical stance.

Driving Forces of Globalisation Fractures

Signals

Local Brands Competing with Global Chains

Brands like Al Baik in Saudi Arabia and Zaatar w Zeit in Lebanon compete with global fast-food chains by offering locally inspired menus, combining global-quality operations with distinctly regional flavors and branding.

Moroccan Handicrafts and the Global Market

Morocco has focused on exporting traditional artisanal products, such as rugs, argan oil, and pottery, to global markets while investing in local cooperatives to empower artisans and preserve heritage crafts.

Starbucks' Pistachio Kunafa Donut

Building on FIX Chocolate's viral pistachio and kunafa flavors, Starbucks Dubai created a donut that fuses these Middle Eastern favorites with a modern twist, offering a treat that celebrates local tastes.

The most impactful Macro Force themes affecting this trend



Increasing geopolitical conflicts



Rising nationalism and populism



Rise and fall of middle classes



Community migration and displacement



Resource depletion



Pervasive technology

Splintered Societies

Trend: Large income and wealth disparities are widely recognised as detrimental to society, yet in many countries they have widened over the past decade. The intensity of this feeling has resulted in heightened societal stress and a splintering of traditional structures, with new ideologies and political allegiances emerging.

Trend in MENA: MENA reflects deepening divides driven by economic disparity, expectations of corporate responsibility, and rising social tensions. These themes show MENA aligning with global concerns on inequality and social fractures but with regional variations.

Tension: As societies worldwide age and begin to shrink, immigration will be the primary dividing line. Around the globe, about half feel that immigration has a positive impact on their society. But even more feel that there are too many immigrants. In MENA however, this is not a central theme, and the tension manifests in a society seeking social equality, while upholding traditional family values.

Takeaway: People also feel that businesses need to contribute more to society. Demonstrating this more clearly could help reduce the temperature of people's feelings about inequality worldwide and at home.

Values

Wealth Inequality
Nativism
Equity

Rising attention on our divisions

Not only is there fracturing of sentiment about globalization, but within borders and even households, there is rising tension. This year's elections have highlighted these divisions, with three-quarters (76%) of people globally agreeing on increased conflict between those holding different values. Furthermore, half (46%) report similar disagreements within their own families.

Anxieties surrounding immigration significantly drive the Splintered Societies trend. Many perceive immigrants as competitors for scarce resources, leading to a rise in nativism. This is reflected in the 71% who believe employers should prioritize local workers over immigrants during economic hardship. While economic inequality is a universal concern, the immigration debate often exacerbates these tensions.

In contrast, the primary driver in the MENA region is a complex interplay of economic disparity, age and gender discrimination, and other contributing factors such as limited government spending on public services, wealth concentration, and deeply ingrained cultural and social norms.

High inflation and limited economic opportunities contribute to widespread feelings of economic injustice. These anxieties are intensified by feelings of discrimination amongst women and older individuals, who often face barriers to employment and equal pay. This intersection creates a unique dynamic in the MENA region, where social divisions are primarily fueled by internal economic and social inequalities.

The MENA region faces specific challenges related to gender inequality, including limited workforce participation for women and persistent discriminatory norms. Deeply ingrained cultural and social norms often restrict women's roles in society, hindering their economic empowerment and contributing to social tensions.

Furthermore, age discrimination, particularly in the workplace, marginalizes older workers and limits their opportunities. These forms of discrimination, combined with economic hardship, create a complex web of social divisions in the MENA region. While efforts are being made to address these issues, progress remains gradual and uneven. The economic costs of this exclusion are substantial, hindering economic growth and perpetuating cycles of poverty and inequality.

77%

agree that having large differences in income and wealth is bad for society

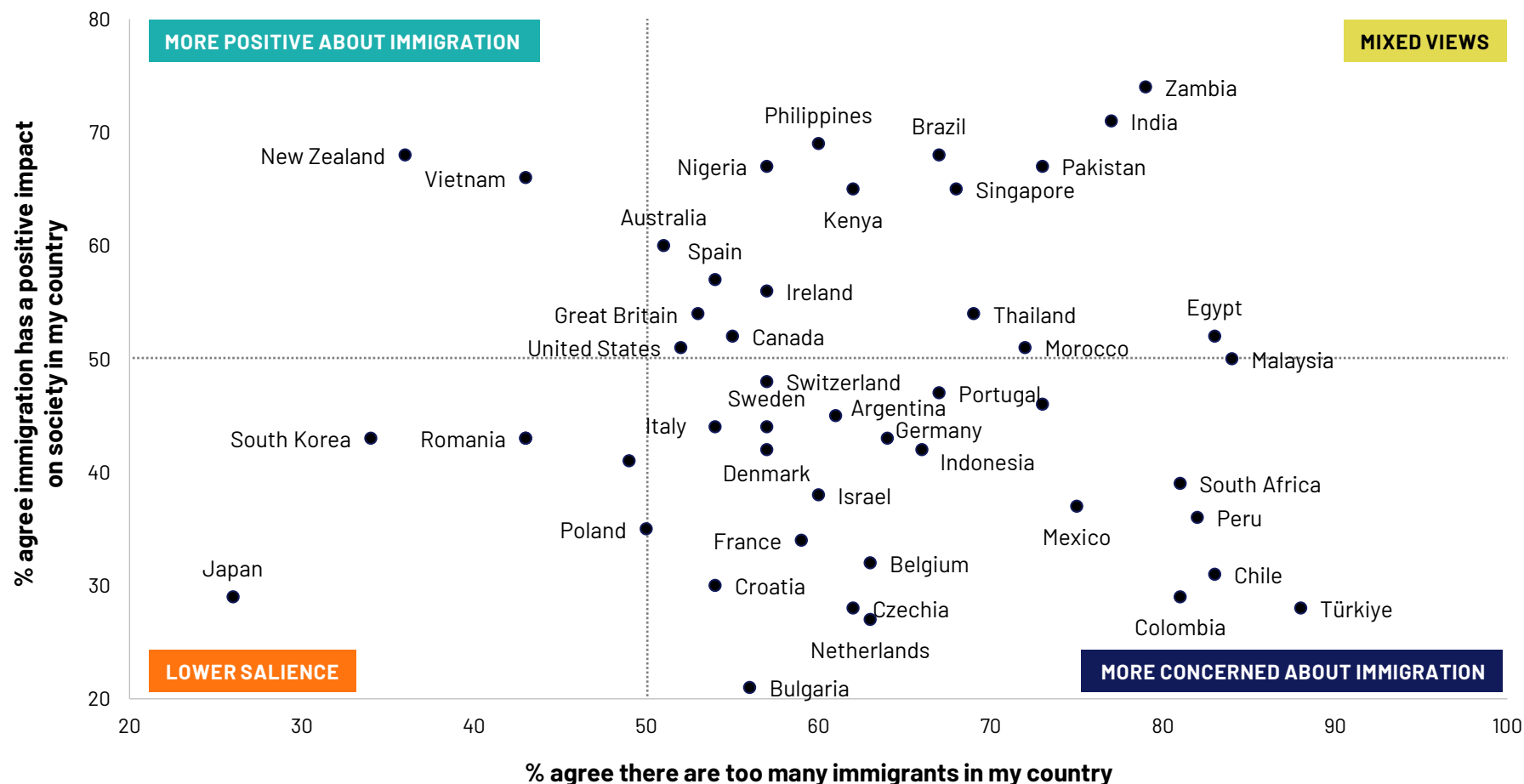
Immigration issues

Globally, 62% agree there are too many immigrants in their country, while 48% agree that immigration has a positive impact on national society.

Just two countries – New Zealand and Vietnam – are doubly positive, seeing immigration as a boon for their society and disagreeing that there are too many immigrants. By contrast, in almost half of the markets (22) the public are doubly negative, including much of Europe.

Many more are somewhere in between – in 18 markets, including the United States, Great Britain and Brazil, a majority are agreed on the positive social impacts of immigration, yet also feel that there are too many immigrants in their country at present.

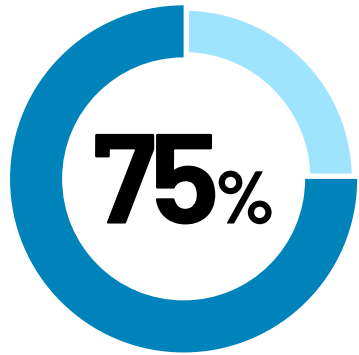
Immigration has a positive impact vs. There are too many immigrants in...



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see [ipsosglobaltrends.com](https://www.ipsos.com/global-trends).

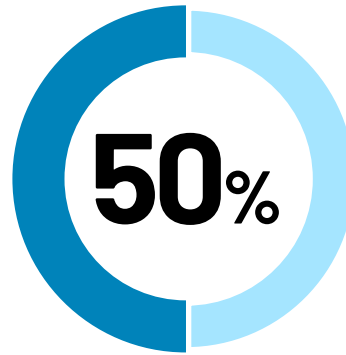
Source: Ipsos Global Trends 2024

MENA's Splintering driven by Economic and Social Divides



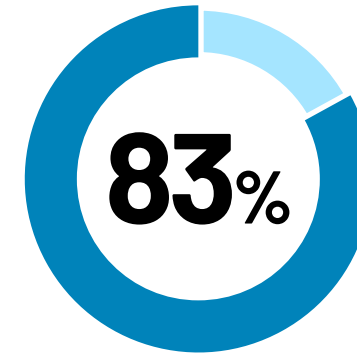
Agree “large wealth gaps harm society”

MENA voices strong concerns about income disparities, with **75% agreeing that large wealth gaps harm society**, nearly matching global sentiment (**77%**). Calls for the wealthy to contribute more are notably strong in **Egypt (81%)** and **Morocco (79%)**, reflecting a heightened regional awareness of economic injustice and a desire for wealth redistribution.



Agree “see rising conflicts over values within families”

Reports of discrimination, especially due to **gender (32%)** and **age (40%)**, exceed global averages, underscoring MENA’s distinct social challenges. Additionally, **50% in the region see rising conflicts over values within families**, particularly in **KSA (53%)** and **Egypt (51%)**. These findings emphasize MENA’s internal tensions, particularly around generational and social norms.



agree “businesses should do more than seek profits”

Across MENA, **83% believe businesses should do more than seek profits**, aligning with global averages. Furthermore, **75% say business leaders should speak on social and political issues** impacting their nations, with robust support in **Egypt (87%)** and **UAE (84%)**. This trend highlights the expectation in MENA that companies should actively contribute to societal wellbeing and voice issues of public concern.

Driving Forces of Splintered Societies

Signals

Saudi Arabia's Women in Workforce Initiative

The Saudi government has launched multiple initiatives under Vision 2030 to boost female workforce participation, including the Wusool transportation subsidy, Qiwa labor market reforms, and leadership training programs like Hemayah and Mawhiba to place women in executive roles.

Egypt's valU: Expanding Financial Inclusion

Egyptian fintech company valU provides installment-based financing for middle- and lower-income consumers, making essential goods and services more accessible. By easing financial barriers, valU is helping bridge the economic divide.

Vogue Arabia Celebrates Imane Khleif's Bold Identity

Vogue Arabia features Imane Khleif, an Algerian boxer challenging traditional gender norms. Despite global criticism, Khleif embraces her authentic self, and Vogue Arabia's support highlights a shift in Arab culture, pushing boundaries and redefining beauty standards and gender roles.

The most impactful Macro Force themes affecting this trend



Population fluctuation



Increasing geo-political conflicts



Greater ethnic and religious diversity



Systemic health inequality



Climate change



Wealth disparity

Climate Convergence

Trend: The macro environment for climate is changing rapidly as worldwide investment in renewables continues to rise and the impacts of global warming become more evident. Our data reflects this: globally, views on the importance of climate action are converging, and have increased in intensity over the past ten years. The key question now is how far – and how fast – people are willing to change their daily lives to reach shared goals.

Trend in MENA: MENA shows strong support for climate action, aligning with global concerns, though perceptions vary on corporate responsibility and personal roles. While urgency is high, expectations differ across markets, indicating a shared understanding of climate challenges.

Tension: Globally, outright denial and skepticism are rare, yet significant differences exist between a core group prioritizing climate issues and the wider population that risks disengagement. In MENA, this tension is reflected in varying levels of urgency for environmental change and engagement in sustainable practices that remains limited.

Takeaway: Brands should demonstrate commitment as people expect more from companies. In MENA, demands for greater corporate accountability make this crucial. People need support to engage in solutions, with initiatives encouraging personal action and fostering meaningful behavioral change.

Values
Climate Responsibility

Dividing lines emerge in the new climate consensus

As in previous editions, a large majority—80%—of the global public agree we're headed for environmental disaster without rapid change. This issue is becoming clearer through the increasing number and intensity of severe weather events and population shifts in response, contributing to changes seen in the more geopolitical trends.

This caps a remarkable convergence in global public opinion over the past decade, across markets and generations. Where the debate was once on whether climate change was occurring, now it is focused on the significant trade-offs inherent in meeting net zero goals.

But the debate of how far and how fast we decarbonize—and who bears the costs—has even greater potential to be polarizing. On one hand, there is a

widespread feeling that companies are not playing their part—77% across 50 markets say companies do not pay enough attention to the environment, and eight in ten (81%) say companies' impacts on the environment should be subject to closer government control.

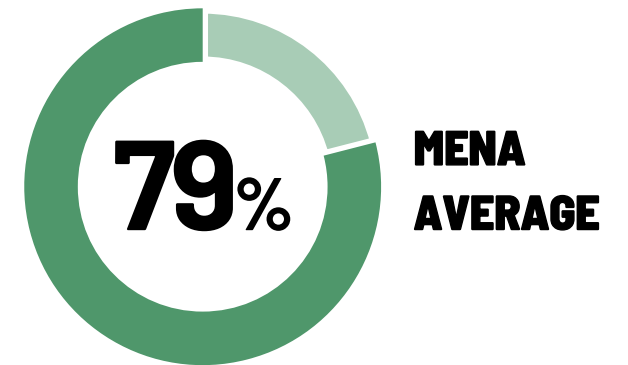
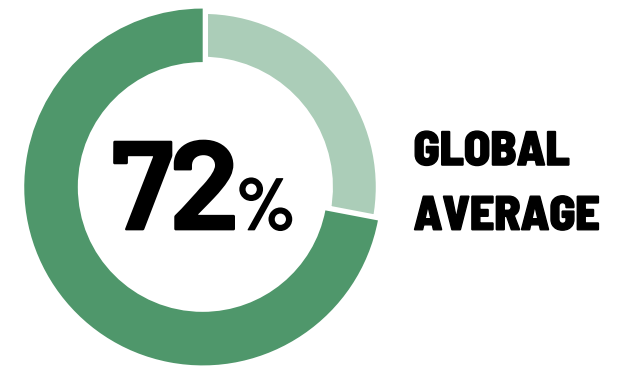
In MENA, there is strong alignment with global concerns, underscored by a high level of awareness about the urgency of climate action. People in the region echo the global call for tighter corporate regulation, reflecting a shared view on the need for corporate accountability. However, while globally people claim to be taking action, in MENA, there's a disconnect between perception and reality. Many in MENA believe they are doing all they can for the environment—more so than the global average— despite their limited actual engagement in sustainable practices. This perception

gap poses challenges for fostering more effective climate action, especially amid broader economic pressures. Globally and in MENA, individuals often feel they are contributing enough, which can slow further progress.

Ipsos' model for a sustainable future starts with understanding individual priorities ("me" agenda) before addressing broader contexts ("my world" and "the world"). While climate is a major concern, it is often overshadowed by personal issues like health and wealth inequality.

As climate responsibility varies, proactive leadership from governments and businesses is vital. Collaborative efforts are key to turning awareness into action, reinforcing both corporate and individual roles in sustainability.

Say they are already doing all that they can to save the environment



Mixed EV enthusiasm

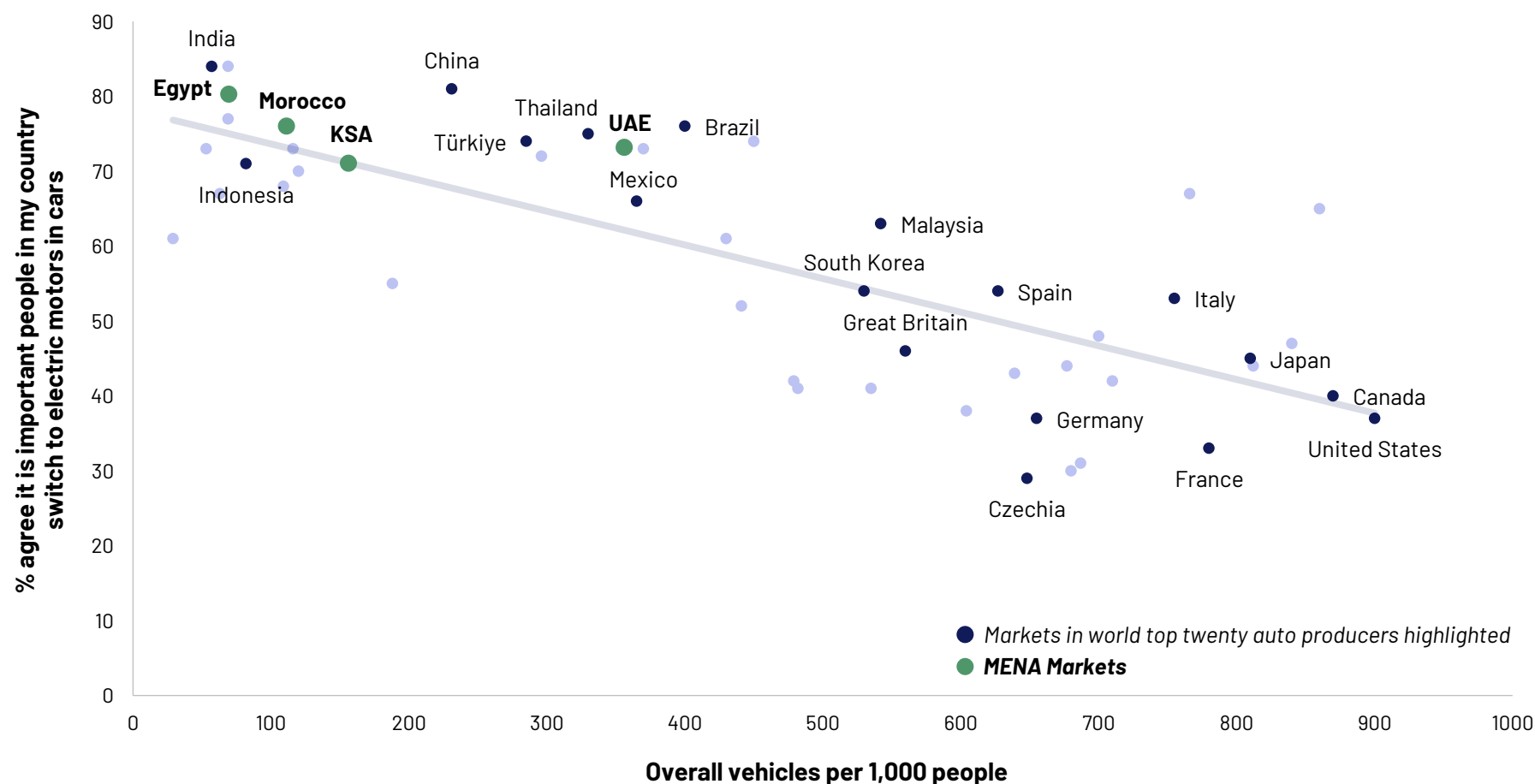
While markets agree that something ought to be done about climate change, disagreement is rife when it comes to the types of action that are important.

Electric vehicles are a key example: decarbonising personal transportation is a significant step towards net zero.

Yet the importance of this shift varies dramatically. While Indian and Chinese people are among the most convinced of the case for EVs, less than half agree in much of Europe and in the US.

Agreement decreases in line with the number of vehicles per 1,000 people in each market — suggesting the conversion to EVs will be more difficult in markets that already have a lot of cars.

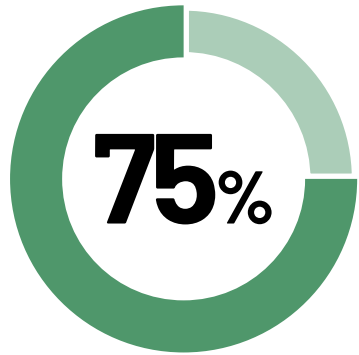
It is important people in my country switch to electric motors in cars



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source: Ipsos Global Trends 2024. Cars per 1,000 people statistics from multiple sources, via Wikipedia

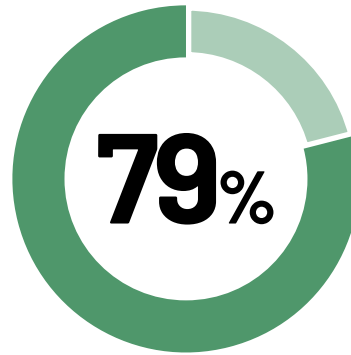
Understanding MENA's Climate Commitment



agree
“we are headed for
environmental
disaster unless we
change our habits
quickly”

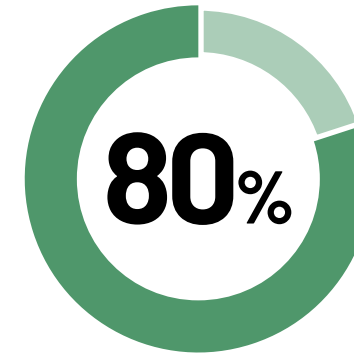
While 75% in MENA recognize the need for urgent environmental change, the sentiment varies by market. **Egypt** leads with **82%** expressing urgency, followed by **Morocco** at **81%**. In contrast, the **UAE** at **70%** and **Saudi Arabia** at **65%** show comparatively lower levels of concern.

This variation highlights differing levels of immediacy perceived across the region regarding environmental challenges.



say they are
already doing all
that they can to
save the
environment

79% of individuals believe they have done their utmost for the environment, surpassing the global average. Notably, **Egypt (83%)** and the **UAE (80%)** report higher self-assessed contributions. However, this reflects a perception gap, as actual engagement in sustainable practices remains limited. There is a critical need for initiatives that inspire further environmental action, motivating individuals to move beyond current efforts to address ecological challenges more effectively.



agree
“companies’ impacts
on the environment
should be more closely
controlled by my
government”

People in MENA strongly advocate for increased government regulation on corporate environmental impacts. **Morocco (84%)** and **Egypt (83%)** demonstrate particularly high expectations for governmental intervention. This contrasts with the **UAE (77%)** and **Saudi Arabia (74%)**, where expectations are somewhat lower. These figures reflect a regional demand for accountability, emphasizing the role of government in enforcing stricter environmental standards across diverse markets.

Driving Forces of Climate Convergence

Signals

Egypt's Green Hydrogen Plant

Egypt is leveraging its abundant solar and wind resources to establish Africa's first green hydrogen plant in collaboration with international partners, making strides in transitioning to renewable energy.

Desert Agriculture and Vertical Farming in Kuwait

Kuwait is investing in vertical farming technologies to address food security and environmental sustainability. These farms use less water and energy, aligning with climate adaptation goals.

Mandatory Carbon Calculator

In Abu Dhabi the Department of Culture and Tourism has enforced a mandatory carbon calculator for all hotels in the city. It tracks fuel, gas, electricity and water use and converts it into a CO2 equivalent score to enable comparison between hotels.

The most impactful Macro Force themes affecting this trend



Climate change



Resource depletion



Sustainable growth



Alternative value structures



Loss of biodiversity



Community migration and displacement

Technowonder

Trend: We are in awe of the technology around us and the role it plays in our lives. We live in wonder: 71% agree we need modern technology to solve future problems. But also, we worry: 57% think technical progress is destroying our lives – a feeling that has significantly risen over a ten-year period. We have very real concerns about our mental health and our careers and don't always see the benefits of technology or tech companies.

Trend in MENA: There is a strong admiration for technology's potential to drive societal progress, with 77% believing it is essential for solving future challenges. However, this optimism is tempered by significant concerns over privacy, mental well-being, and job security.

Tension: The beauty and convenience of technology often collide with potential threats and human vulnerabilities. In MENA, this tension is particularly evident, with significant concerns about privacy and the inevitability of data misuse, which weigh heavily on public perception.

Takeaway: There is a lot of opportunity for brands and platforms to build trust and educate people on the benefits of technology while assuaging concerns over privacy, disinformation, security, and potential job losses. In MENA, fostering trust and authenticity in digital interactions is crucial as AI and social media continue to shape societal norms.

Values

Technological Worry
Technological Fatalism
Technological Optimism

We live in wonder of what technology can do, but we worry that it's gone too far

Globally, technological progress is often viewed through a dual lens, balancing its potential benefits with its inherent risks. On the one hand, technology inspires wonder through its ability to solve societal problems, such as finding faster cures for diseases and simplifying jobs.

Almost three in four (71%) globally believe that technology is essential for addressing future challenges, highlighting its deep integration into all aspects of life, from entertainment to healthcare. In MENA, this sentiment is even stronger, with 77% agreeing on the necessity of technology.

Conversely, there is a growing global concern about data privacy and control, with significant unease about how collected data about people is being used. This worry is even more pronounced in MENA, where 71%

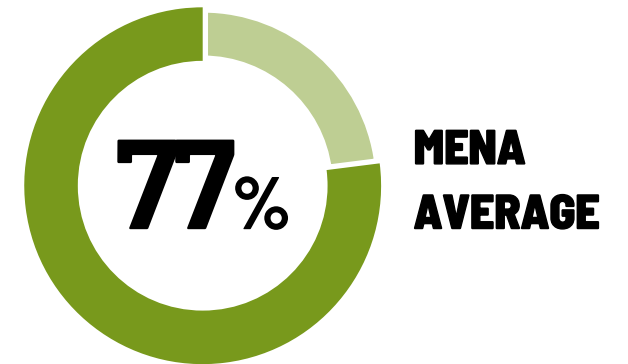
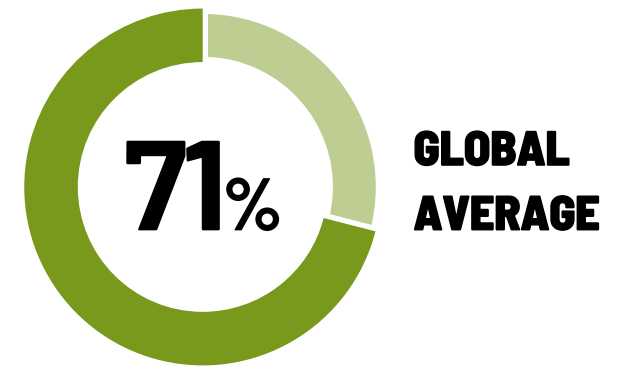
express concerns about data usage, and 79% feel privacy loss is inevitable. Moreover, many in the region fear that technological progress might be 'destroying our lives,' with 70% in MENA expressing this concern, significantly above the global average of 57%. This disparity underscores the stronger apprehension in MENA regarding the potential negative impacts of technological advances.

Moreover, technology's pervasive presence raises significant challenges, particularly in MENA. Social media, while connecting individuals, has shifted societal interactions toward more online engagement, with 37% of people spending more time socializing online rather than face-to-face. Additionally, there is a distinct concern about information credibility, as MENA heavily relies on online sources but

trusts them the least, with 73% expressing distrust. The rise of AI further complicates these issues, potentially exacerbating doubts about data reliability and privacy.

This atmosphere of wonder and worry creates a complex environment where the benefits and potential threats of technology must be balanced. In both MENA and globally, AI, virtual spaces, and health technologies are at the forefront of innovation. However, to gain acceptance, these advancements must address tangible societal challenges. Brands have the opportunity to build trust by highlighting technology's benefits, managing risks, and aligning with human values. This is crucial for gaining public support and ensuring tech progress enhances the quality of life rather than diminishing it.

feel that we need modern technology because only this can help to solve future problems



Technowonder?

The feeling that technical progress is destroying our lives is held by a majority in 41 of the 50 markets surveyed, but by more than four in ten in every market.

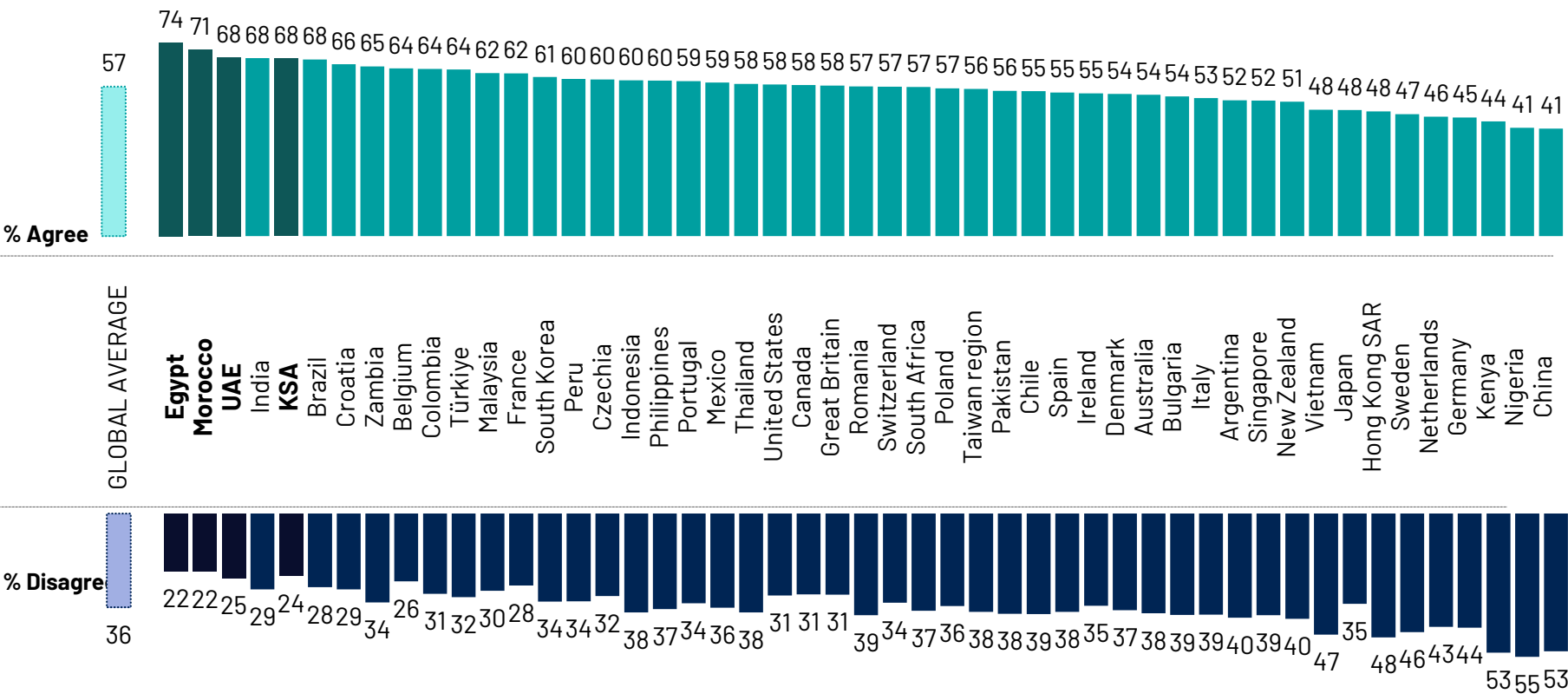
That's balanced with a feeling held by 71% who say technology is also the only thing that will solve the problems facing us as people, markets and society.

Our worries include 73% who are concerned about how their data is used by companies or the government (68%) and that it's inevitable that we will lose more privacy (78% agree).

While a majority agree that social media companies have a positive impact, there's wide variance from 87% in Indonesia to just 24% in the Netherlands.

I fear that technical progress is destroying our lives

To what extent do you agree or disagree with the statement...

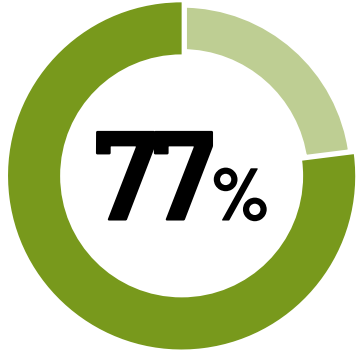


Base:
50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source:
Ipsos Global Trends 2024

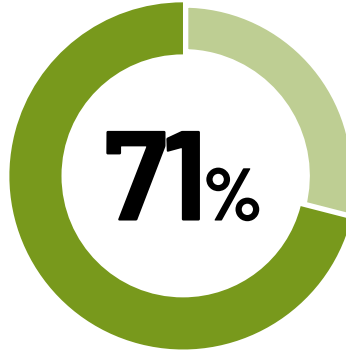


Market Nuances in MENA's Tech Outlook



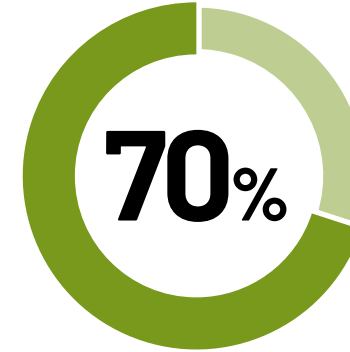
feel that we need modern technology because only this can help to solve future problems

In MENA, 77% agree that modern technology is essential for solving future problems, demonstrating even greater optimism than the global average. This highlights MENA's strong commitment to leveraging technology for societal advancements. **Egypt (81%)** and **UAE (78%)** are at the forefront, underscoring a regional focus on innovation as a key driver for progress.



are concerned about how information collected about them when they go online is being used by companies

Despite acknowledging the benefits of technology, 71% of people in the region express concerns over data usage. This concern is particularly pronounced in **Egypt**, where **76%** express unease, and in the **UAE**, where **72%** share similar worries. Furthermore, **79%** in **MENA** accept privacy loss as inevitable, with **Egypt** at **83%**, reflecting a heightened awareness of data vulnerabilities and potential overreach.



fear that technical progress is destroying our lives

MENA significantly exceeds the global average in fearing technology's adverse effects, with 70% of people believing that technological progress might be 'destroying our lives,' compared to the global average of 57%. **Egypt (74%)** and **Morocco (71%)** lead this sentiment. However, there is notable optimism in the **UAE (69%)** and **KSA (68%)**, where social media and AI are perceived as having a net positive impact, illustrating the region's nuanced view on balancing innovation with security and ethical considerations.

Driving Forces of Technowonder

Signals

Dubai's RoboCop Initiative

Dubai Police introduced AI-powered RoboCops to assist with public safety and interact with residents. These robots can patrol streets, provide information, and even process payments for fines.

Artificial Intelligence in Education

Saudi Arabia's "Tatweer" education initiatives use AI tools for personalized learning, interactive classrooms, and enhanced student performance analytics.

Careem's Super App Evolution

Careem transitioned from a ride-hailing app to a super app, incorporating food delivery, financial services, and shopping, showcasing the fusion of tech and everyday convenience in MENA.

The most impactful Macro Force themes affecting this trend



Pervasive technology



The immersive frontier



AI and automation advances



Exponential data



Toll of technology



Technology's dark side

Conscientious Health

Trend: Health is becoming more holistic, as most of us globally feel that we need to do more for our physical as well as our mental wellness. Despite this, healthy living is a struggle for many and most people feel they need to lose weight. Health's link with nutrition and technology is shifting focus from just living longer to aging better.

Trend in MENA: In MENA, the trend mirrors global shifts toward holistic wellness emphasizing greater self-reliance and lifestyle improvement. With higher priorities for physical (88%) and mental health (86%), the region appears to show commitment to comprehensive health management.

Tension: Globally, the tension between physical and mental health is dissolving, but there is a persistent question of who has access, especially as new “wonder” drugs enter the market. In MENA, despite a focus on holistic wellness and self-reliance, translating awareness into action is challenging, revealing gaps in health management and highlighting the need for strategies to tackle persistent issues like diabetes and obesity.

Takeaway: With growing awareness of holistic health needs, opportunities arise to guide people through this increasingly complex landscape. In MENA, brands can offer practical resources that turn health awareness into action, empowering healthier lifestyles and supporting regional wellness goals.



Values

Health Self-reliance
Health Improvement
Longevity

From Intent to Impact:

MENA's Path to Comprehensive Wellness

Our data highlights a strong global commitment to health, with improvement and self-reliance among top values. This trend is mirrored in MENA, where there is an even greater emphasis on self-reliance and lifestyle improvement—at least in thought. The region appears to prioritize balancing physical (88%) and mental health (86%) slightly more than global averages, with a narrower two-point gap compared to the global three-point gap, highlighting heightened awareness of comprehensive wellness.

Globally, the urge to lose weight is widespread, with 63% wanting to shed pounds. In MENA, this interest is even more pronounced, reflecting a strong desire for healthy living. However, despite prioritizing health, many in MENA struggle to maintain healthy

lifestyles. High rates of diabetes and obesity underscore a significant disconnect between health awareness and actual behavior, revealing the challenges in translating good intentions into practical, everyday actions.

Self-reliance in health management is a key trend, with 82% in MENA prioritizing self-research and a significant 87% desiring greater control over health decisions, surpassing global averages. While this shows a regional commitment to empowerment and personal agency in healthcare, it also raises concerns about the effectiveness of self-guided health strategies without adequate professional guidance. This reliance on personal judgment could potentially lead to misinformation or inadequate health management, exacerbating existing health issues.

The disconnect between the aspiration for a healthier lifestyle and the reality of health practices in MENA highlights a critical need for practical, supportive solutions. Organizations have an opportunity to bridge this gap by providing resources that empower individuals to make informed health decisions and encouraging sustainable lifestyle changes. By addressing these challenges, brands can play a pivotal role in transforming health awareness into tangible improvements in well-being, ultimately enhancing the quality of life in the region.

The narrowing gap between those who wish to do more to look after their physical health versus their mental wellbeing

3ppts
GLOBALLY

2ppts
IN MENA

Conscientious Health

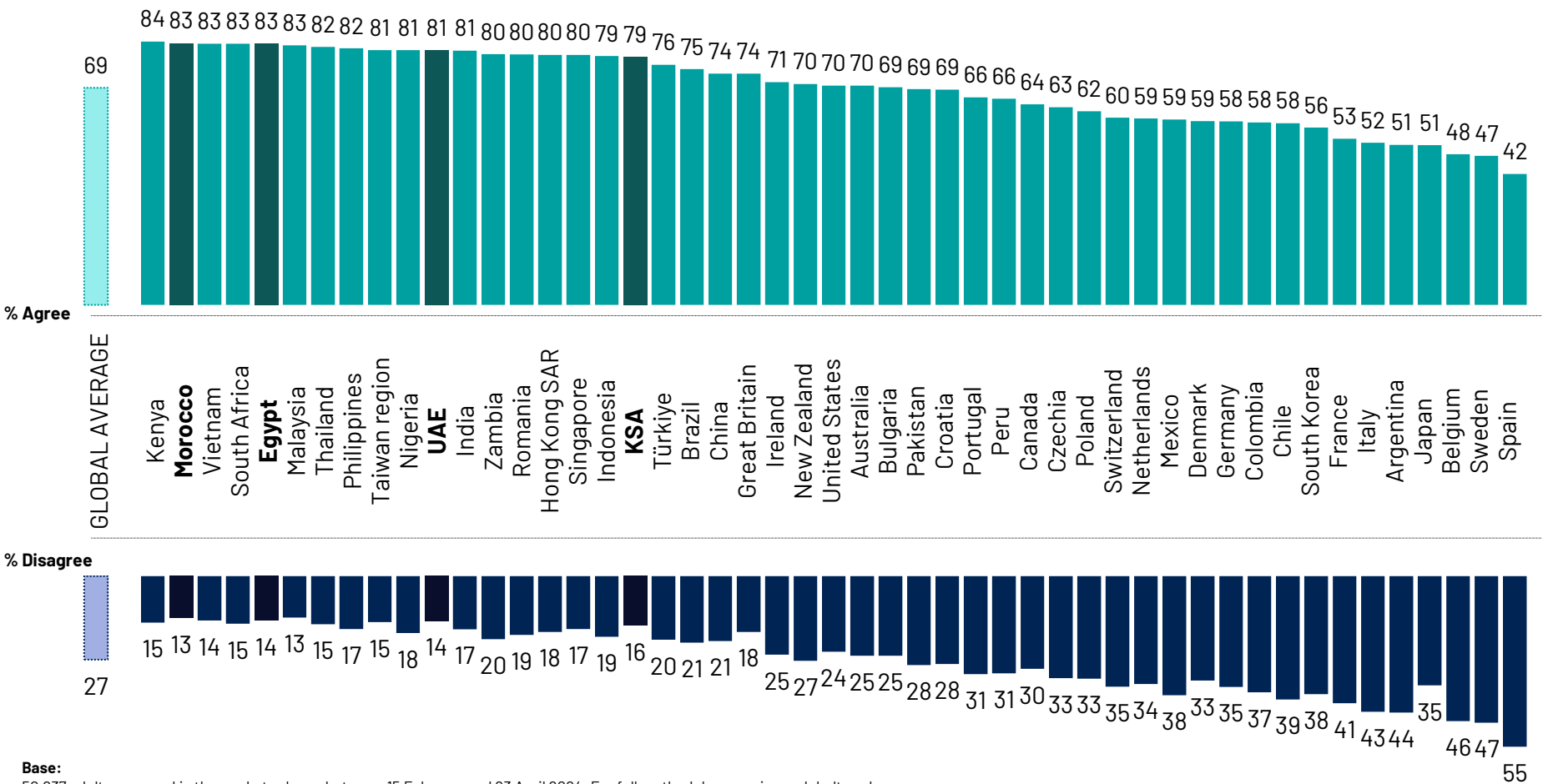
Around seven in ten people globally take health matters into their own hands, conducting personal healthcare research rather than depending completely on doctors.

This trend, often linked to "Dr Google," echoes a desire for autonomy, particularly in well-served populations. Yet, this self-reliance is strongest in areas with limited medical infrastructure. In markets with fewer physicians per capita, such as Kenya, South Africa, Morocco, and Egypt, there's a notable appetite for self-guided health information.

Conversely, in Sweden, Belgium, and Spain, where doctor availability is higher, and health services are more proactive, less than half of the population actively seeks out health information independently.

I always try and find out information on healthcare by myself, rather than just relying on what my doctor tells me

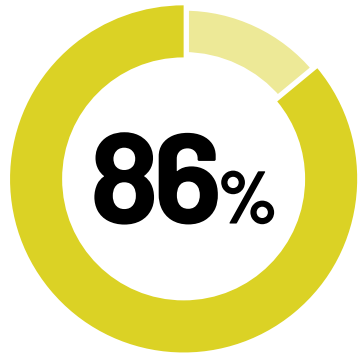
To what extent do you agree or disagree with the statement...



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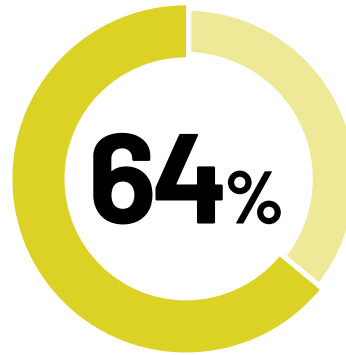
Source: Ipsos Global Trends 2024

Regional Health Dynamics in MENA



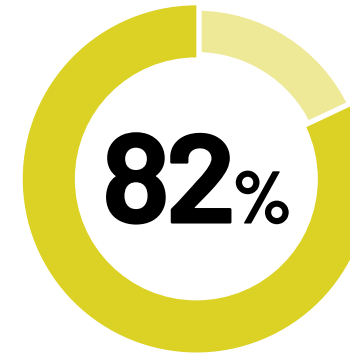
agree
“I need to do
more to look
after my mental
wellbeing”

In MENA, the emphasis on balancing physical and mental health is slightly higher than global averages, with 88% prioritizing physical health and 86% focusing on mental well-being. Egypt and Morocco stand out as particularly health-conscious markets, with **90% in Egypt** and **87% in Morocco** agreeing that they need to do more to look after their mental well-being. This regional focus underlines the growing recognition of mental health as a critical component of holistic wellness in MENA.



agree
“I would like
to lose
weight”

Interest in weight management is notably higher in MENA compared to global figures, with **71%** of individuals in the **UAE** and **70%** in **KSA** expressing a desire to lose weight. This heightened interest indicates a regional focus on the idea of healthy living, driven by concerns about obesity and related health issues.



always try to find out
information on
healthcare by
themselves, rather
than just relying on
what their doctor tells
them

MENA demonstrates a strong inclination toward self-reliance in health management, with 82% of individuals prioritizing self-research and 87% seeking greater control over health decisions. This trend is especially prominent in **Egypt** and **Morocco**, where self-reliance rates reach **83%**, highlighting a strong regional drive for empowerment. These figures exceed global averages and illustrate a cultural move towards increased personal agency and autonomy in healthcare choices.

Driving Forces of Conscientious Health

Signals

SFDA's Healthy Food Strategy

The Saudi Food and Drug Authority (SFDA) launched its Healthy Food Strategy, partnering with global brands like Nestlé, Mars, Mondelez, Ferrero, Kellogg's, PepsiCo to reduce sugar, salt, and fat in products and improve nutritional labeling, promoting healthier consumption in Saudi Arabia.

Dubai Fitness Challenge (Dubai 30x30)

The Dubai 30x30 initiative encourages residents to stay active with 30 minutes of exercise daily for 30 days. With over 2 million participants, it promotes a fitness culture through city-wide events, free classes, and activities.

Zain Jordan's Wellness Initiatives

Zain Jordan, a leading telecommunications provider, has launched an initiative focused on mental health and fitness, encouraging employees and customers to participate in wellness programs through their mobile apps. Zain also partners with health organizations to raise awareness about lifestyle diseases.

The most impactful Macro Force themes affecting this trend



Systemic health inequality



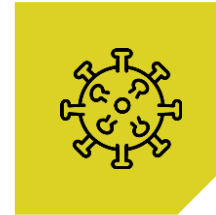
The toll of technology



Integration of health and technology



Break-through therapies



The next pandemic



Population fluctuation

Retreat to Old Systems

Trend: An escape to nostalgia appeals to many people around the globe, at least half in 40 of our markets would like their country to be the way it used to be. Even if the past we are nostalgic for is imagined as a sanitised one, this can lead people to push back against trends that are seen to challenge existing systems. This can be a clamour for a "return" to historical power structures, religious practices, employment patterns, gender roles, and more.

Trend in MENA: In MENA, the yearning for tradition and stability mirrors global trends but varies in intensity. Nostalgia is slightly less pronounced than globally, with some areas more attached to traditions, while others adapt to modern changes more readily

Tension: What some see as progress, others see as a move away from traditional values they hold dear, or a threat that will see them lose out to the benefit of others. In MENA, this is evident in the strong endorsement of traditional roles, particularly concerning gender and faith as central societal pillars.

Takeaway: While nostalgia remains a powerful tool for marketers looking to build connections, it's good for brands to remember that the good old days weren't always good for everyone. In MENA, balancing modernity with cultural identity is key, as consumers seek to integrate heritage with contemporary influences.



Values

Nostalgia
Traditionalism

The comfort of old structures and systems has mass appeal in the face of an uncertain future

The perfect storm of a challenging present and an uncertain future brings a natural allure to the past. The warm glow of nostalgia is a trope of recessions and crises across the past century. The Trend of Retreating to old systems describes one reaction to this environment, but it can go further than nostalgia; linking to power structures and control. For the young, it is partly rooted in pessimism for their present and future.

The value of Traditionalism provides one clear example: 81% agree traditions are an important part of society. We see this through rising interest in content promoting traditional gender roles. This is mirrored in MENA, where the endorsement of traditional values is even stronger, with 87% emphasizing their importance. Social roles,

particularly around gender, play a key role in this trend. In MENA, 71% believe women's primary role is as mothers and wives, a view nearly double the global average, reflecting a stronger adherence to structured societal norms. Faith also plays a crucial role in MENA, with 89% considering it central to identity, highlighting its stabilizing influence compared to the global figure of 60%.

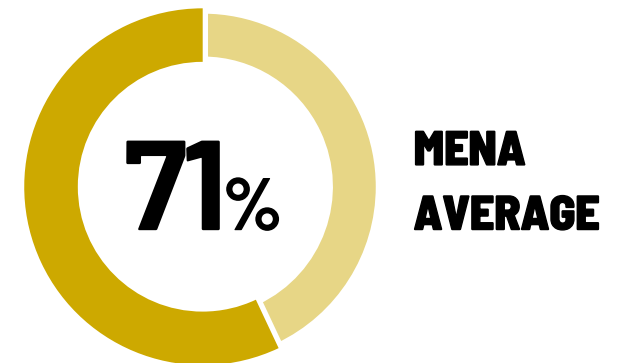
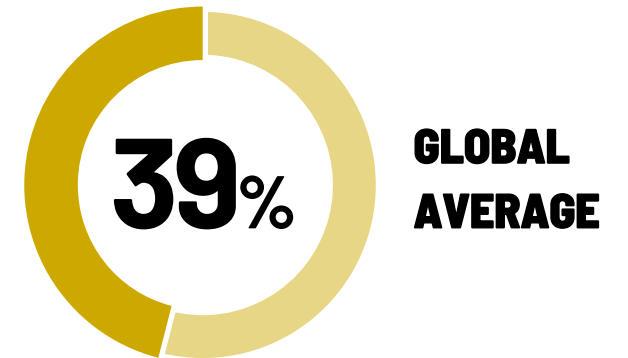
Nostalgia is more complex than simply wanting to live in the past, with significant cultural and demographic variations. In MENA, 54% express a desire to return to a simpler, familiar past, slightly below the global average of 57%.

Both nostalgia and traditionalism speak to a retreat into familiar structures or the self, offering comfort

amidst uncertainty. While these values remain weaker overall, their rising importance globally and regionally indicates a desire to balance modernity with cultural heritage as we face an unpredictable future.

In MENA, the emphasis is on preserving stability through traditions while managing societal changes, showcasing a subtle balance between nostalgia and adaptation.

agree "the main role of women in society is to be good mothers and wives"



The four flavours of nostalgia

We measure two types of nostalgia in Global Trends: national nostalgia and personal nostalgia. Markets can exhibit, both, one or neither:

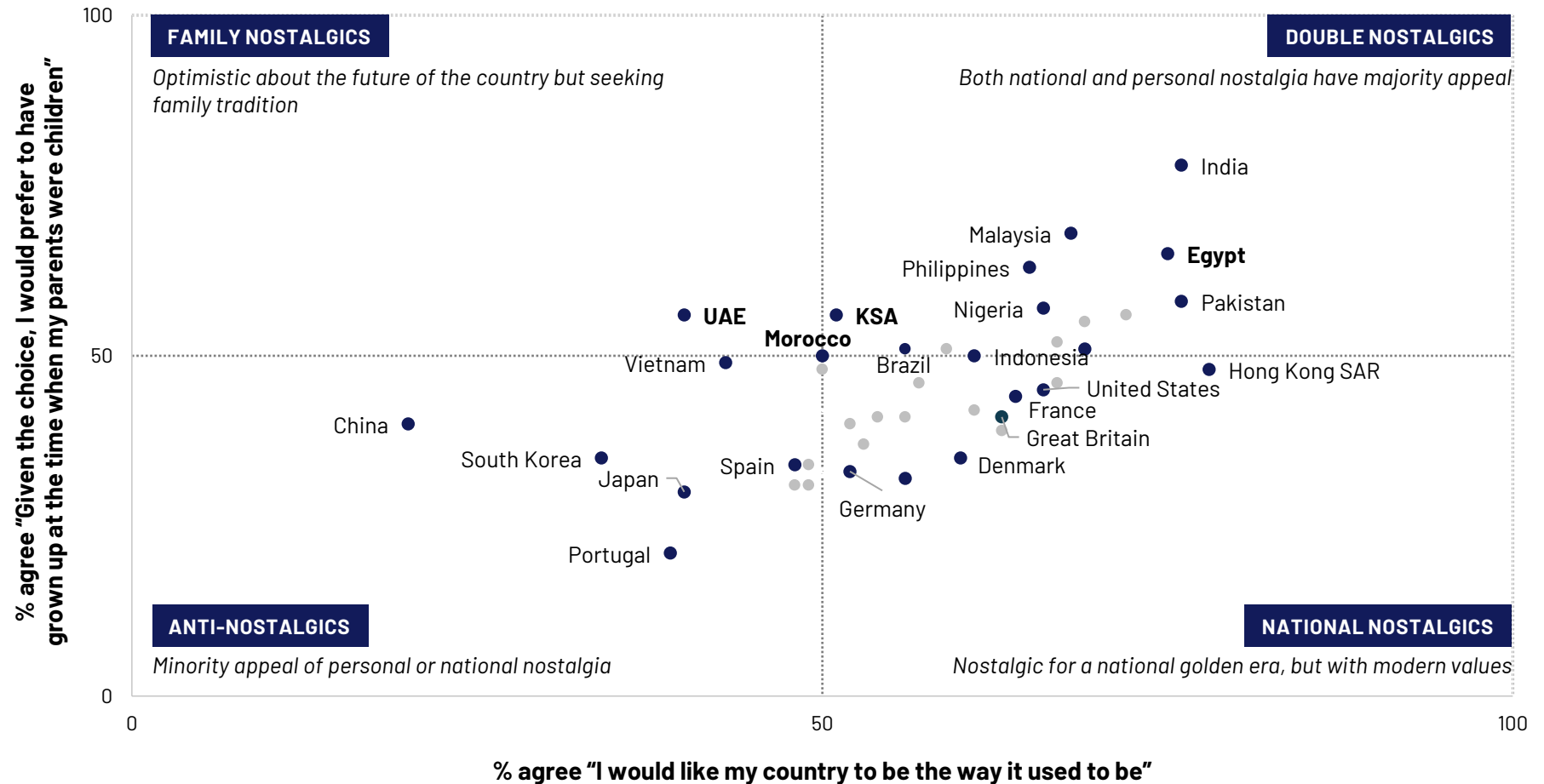
Double nostalgics feel their nation was greater in the past and would also like to have grown up when their parents were children.

National nostalgics would like their nation to relive its glory days, but without the values and hardships their parents grew up with.

Family nostalgics favour a modern nation with the mores of their parents.

Anti nostalgics see the present as better than the past for their nation and their families.

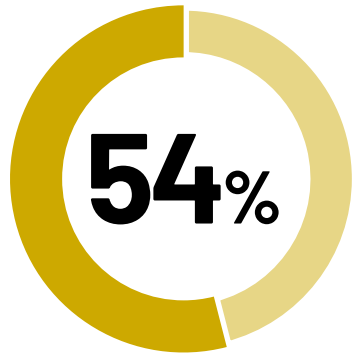
To what extent do you agree or disagree with the statements... [Selected markets]



Base: 49,233 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source: Ipsos Global Trends 2024

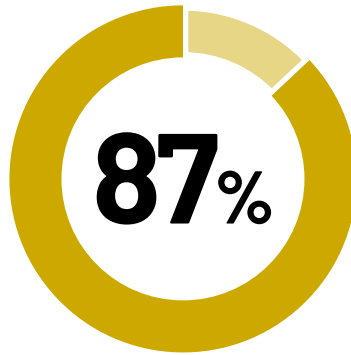
Understanding Market Variations in MENA's Traditional Values



agree
"I would like my country to be the way it used to be"

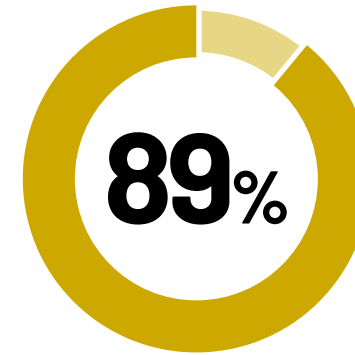
In MENA, 54% express a wish for their country to return to the past, which is slightly below the global average of 57%. This sentiment reflects a longing for simpler times amidst modern complexities.

Egypt, with a stronger nostalgia at **75%**, contrasts with the **UAE**, where only **40%** hold this view. This variation illustrates the region's differing levels of sentimentality and adaptability to contemporary changes, highlighting the nuanced perspectives within MENA.



agree
"Traditions are an important part of society"

In MENA, the endorsement of traditional values is notably strong, with 87% considering traditions essential, surpassing the global average of 81%. This reflects a broad regional appreciation for structured societal norms. Within MENA, there are notable differences, with **Saudi Arabia (74%)** and **Egypt (73%)** leading in the belief that women's primary role is as mothers and wives. These figures, nearly double the global average of 39%, highlight the diverse attitudes toward tradition across different MENA markets.



agree
"My religion/faith is very important to me"

Faith holds significant importance in MENA, with 89% viewing it as central to their identity, compared to 60% globally. This highlights the profound influence of religious beliefs in offering stability and continuity. **Egypt**, with **93%**, exemplifies how faith serves as a foundational pillar. This strong emphasis on religion highlights its crucial role in maintaining cultural cohesion amid modern challenges.

Driving Forces of Retreat to Old Systems

Signals

KARAMA - Reviving Traditional Arabic Architecture

Al Dar Properties' KARAMA project blends traditional Arabic architectural elements, like courtyards, arches, and intricate woodwork, with modern luxury amenities. This residential development offers a nostalgic experience of Arab design while integrating contemporary living features.

The Resurgence of Local Clothing in Saudi Arabia

Traditional clothing like the "thobe" and "abaya" have experienced a revival, particularly among younger generations. Fashion brands are incorporating traditional elements into modern designs, reflecting a desire to reconnect with cultural heritage.

Coca-Cola's Ramadan Heritage Bottles

Coca-Cola introduced limited-edition bottles with vintage Arabic calligraphy and traditional Islamic designs to celebrate Ramadan. By linking the brand to cherished cultural moments, these bottles tap into nostalgia and emphasize values of family and togetherness.

The most impactful Macro Force themes affecting this trend



Community migration and displacement



Rising nationalism and populism



Wealth disparity



Greater ethnic and religious diversity



Identity acceptance



Pervasive technology

Nouveau Nihilism

Trend: There is now a generational disconnect when it comes to milestones like buying homes, getting married, and starting families. Financial realities are keeping those dreams out of reach for many. This is feeding widespread sentiment that it's better to live for today – either because tomorrow is uncertain, or that it will simply take care of itself, because individuals feel powerless to take personal control.

Trend in MENA: "In MENA, this outlook reflects resilience and a 'live in the moment' mindset amid economic and social challenges. The region remains optimistic about the future, fueled by aspirations for growth and technological progress

Tension: Traditional milestones remain prioritized in many countries, even as they become less attainable. In MENA, despite a focus on living for today, traditional values endure. The region's lower perception of value conflict compared to global levels suggests a balance between maintaining traditions and adapting to modern challenges, reflecting MENA's unique coexistence of cultural norms and a pragmatic approach to current realities.

Takeaway: Nihilistic tendencies drive people to live in the moment and potentially take rash decisions, exemplified by the rise of buy-now, pay-later and personal debt products. Helping people to bridge the gap between their lived reality and their aspirations is an opportunity for brands and governments alike. In MENA, leveraging the region's optimism and focus on progress could provide a path forward.

Values

Living in the Moment
Anti-establishment

What's new about nihilism?

Globally, numerous factors contribute to the belief that the world is declining, from climate disasters to economic uncertainties. This sentiment, encapsulated by the "you only live once" (YOLO) mindset, has evolved as we become more aware of global events through constant information access.

Moreover, the pandemic highlighted life's fragility and interconnectedness, prompting a shift in attitudes: why save for the future when the future is uncertain?

In MENA, the "live in the moment" outlook is pronounced, with 70% agreeing that tomorrow will take care of itself, surpassing the global average. This mindset aligns with regional challenges, where living for today serves as a coping mechanism.

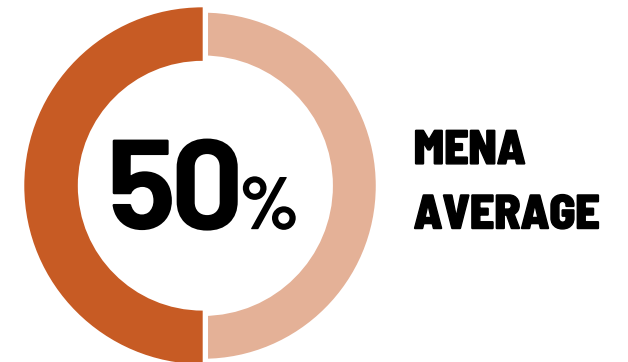
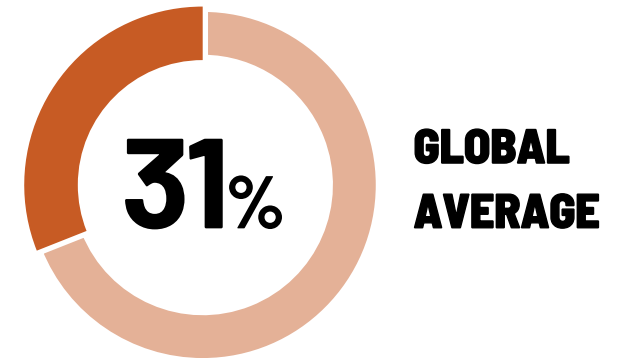
In contrast to global perspectives, MENA shows a lower perception of conflicts over differing values, indicating the region's resilience and pragmatic adaptation to economic and social challenges.

This suggests that while the world grapples with heightened value-based conflicts, contributing to a sense of nihilism, MENA's relative cohesion allows its populations to focus more on immediate realities. This moment-focused resilience, rather than loss of hope uniquely shapes Nouveau Nihilism in MENA, where there's realistic flexibility in facing challenges.

As brands and governments look to bridge the gap between current realities and aspirations, leveraging MENA's optimism and focus on progress provides a pathway for

offering support and solutions that resonate with this unique regional outlook

say they are optimistic about the world in general over the next 12 months



Nouveau Nihilism

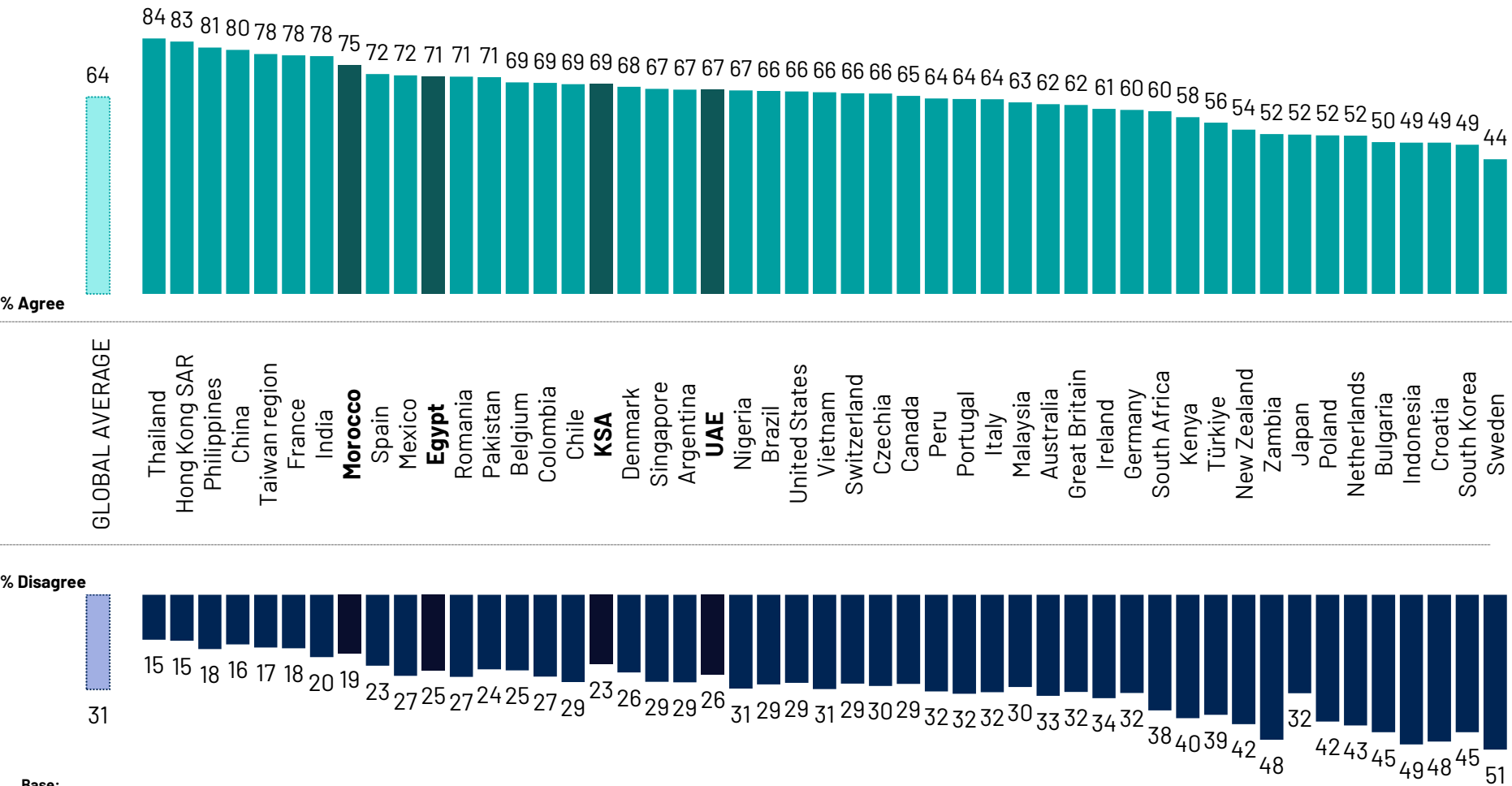
Two thirds across 50 markets embrace the "YOLO" mentality, living for today because the future is uncertain. This mindset is particularly strong in Thailand, where 84% agree, but weaker in Sweden where only 44% feel this way.

Hedonism — which has seen increased sentiment over time — has always existed, but nowadays when combined with low faith in government and authorities to improve the future, it feeds a new type of nihilistic sentiment that erodes support.

We see a complex landscape of evolving attitudes and economic realities that governments and policy makers will need to navigate carefully.

I live for today because the future is uncertain

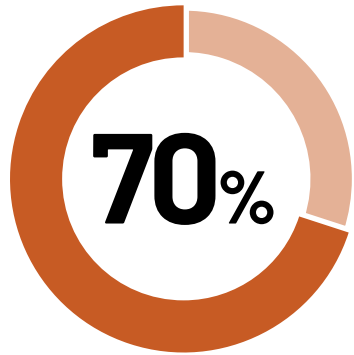
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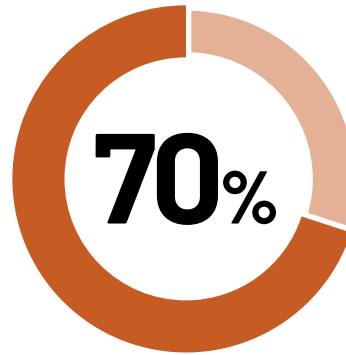
Source: Ipsos Global Trends 2024

Understanding MENA's Present-Focused Mindset



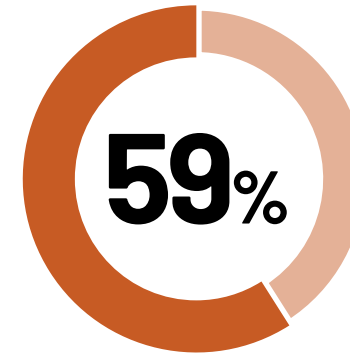
agree
"The important thing is to enjoy life today, tomorrow will take care of itself"

In MENA, the "live for today" philosophy surpasses the global average of 62%, with **Morocco** leading at **74%**. This perspective is a prominent feature across the region, illustrating how MENA markets, especially Morocco, adapt to uncertain futures. The emphasis on present-focused strategies highlights how these markets navigate ongoing economic and social challenges, prioritizing immediate experiences over long-term uncertainties.



agree
"I live for today because the future is uncertain"

The inclination to prioritize today due to future uncertainties is more evident in MENA, with 70% supporting this view versus 64% globally. **Morocco (75%)** and **Egypt (71%)** exemplify this mindset, reflecting a practical regional response to global economic instability. This approach highlights how individuals in MENA concentrate on immediate issues, adapting their strategies to address current challenges instead of distant plans.



agree
"In my country, there is more and more conflict between people who don't share the same values"

While 76% globally see increasing value conflicts, this perception is less prevalent in MENA, with only 59% concurring. **Egypt** reports the highest level of value conflict at **69%**, pointing to a more divided society than the **UAE** at **54%** and **KSA** at **52%**, where this sentiment is lower. This highlights regional differences in societal cohesion, with most MENA countries generally leaning towards a more harmonious approach to differing values.

Driving Forces of Nouveau Nihilism

Signals

Telfaz11's Unconventional Content

Telfaz11's digital platform creates edgy, satirical content that challenges societal norms, resonating with young audiences seeking to break away from traditional storytelling.

Nike's "What If You Can?" Campaign

Nike's "What If You Can?" campaign in Saudi Arabia challenges norms and encourages breaking boundaries. It resonates with a younger audience, promoting self-expression and individualism, aligning with the trend by questioning limitations and embracing a new, unrestricted identity.

Carrefour's Choose Better Initiative

Carrefour's "Choose Better" initiative promotes minimalist, sustainable products, offering eco-friendly options that align with the growing demand for responsible consumption. This initiative taps into the trend by reflecting a shift away from overconsumption and excess, embracing simplicity, sustainability, and mindful choices in response to modern disillusionment.

The most impactful Macro Force themes affecting this trend



Climate change



Increasing geopolitical conflicts



Rethinking institutions



Entrenched inequality



The next pandemic

The Power of Trust

Trend: In a world flooded with information, misinformation and even disinformation, we crave authentic messages from trusted sources. In this context – and more dramatically so than in 2013 – brands assume greater importance, becoming extensions of our own worldview and values. But greater uncertainty now comes from changes in how and why we choose to trust some organisations and not others.

Trend in MENA: While MENA shares global concerns about trust in brands, it faces unique challenges. The region exhibits a strong reliance on established brands, with many trusting new products from familiar names.

Tension: As trust becomes more erratic, it also becomes more important. Yet a widespread sense that customer service is worse and more automated than it was threatens the trust companies have already built. In MENA, this is particularly relevant as consumers balance trust in familiar brands with concerns over impersonal service, emphasizing the need for authentic interactions to build trust.

Takeaway: In polarised times, brands must figure out where it's best to lean into values, and when to simply serve the consumers who just want the benefits of product – while also reconciling these seemingly opposite stances. In MENA, addressing concerns over automated customer service by fostering genuine interactions can strengthen trust and offer a competitive edge, helping brands to successfully navigate the challenges of maintaining consumer loyalty and engagement

Values

Informed Consumerism
Brand Worship
Experience

New opportunities and threats for brand affinity

Globally, this trend is driven by changes such as rapid technological growth and shifting attitudes towards global and local products. These changes boost the influence of brands but weaken the traditional advantages of established companies. Regulation, along with transparency and responsibility, plays a significant role, especially in the EU, Americas, and other markets.

In MENA, the trend aligns with global patterns, with a strong reliance on familiar brands. However, concerns about overly automated customer service are also present, emphasizing the need for authentic interactions to sustain trust.

The strongest value globally is Informed Consumerism, with consumers seeking deals in response

to inflationary pressures. This is mirrored in MENA, where brand familiarity is key, yet consumers are also willing to pay premiums for brands that resonate with their values, highlighting both cost-consciousness and value alignment.

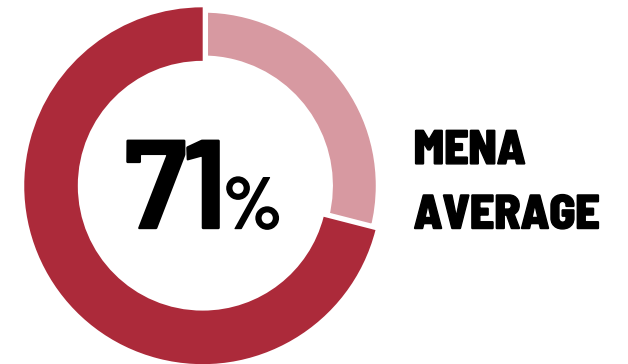
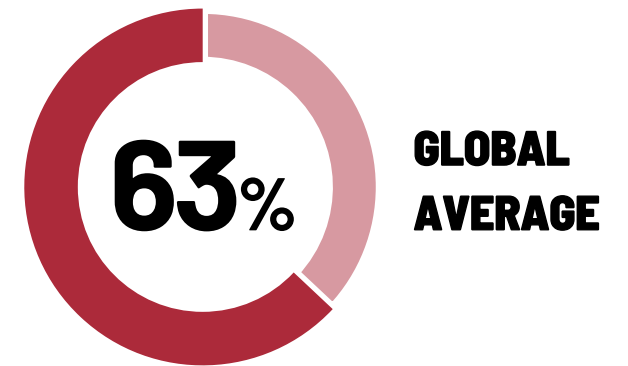
Brand Worship emphasizes trust in known brands, with 81% globally preferring new products from familiar names. In MENA, this trust is equally significant, influencing purchasing decisions. Nevertheless, not all consumers are willing to pay extra for brand image alone.

Customer Experience significantly influences trust and brand equity. Both globally and in MENA, there is a growing concern that customer service has become overly automated and lacks a personal touch. MENA

consumers particularly value genuine engagement and are willing to invest more for better service quality. This underscores the need for brands to enhance personal engagement, ensuring consumer trust is maintained through meaningful and tailored interactions.

As brands navigate the contradictions between global and local, online and offline, they must adapt strategies to address these challenges. In MENA, enhancing genuine customer experiences is crucial to aligning consumer expectations with brand delivery, ensuring trust remains central to consumer relationships.

say they are prepared to pay more for a better customer experience



Brands vs Value

The world is divided when it comes to spending more on a brand with an appealing image — 55% globally agree and 41% globally disagree.

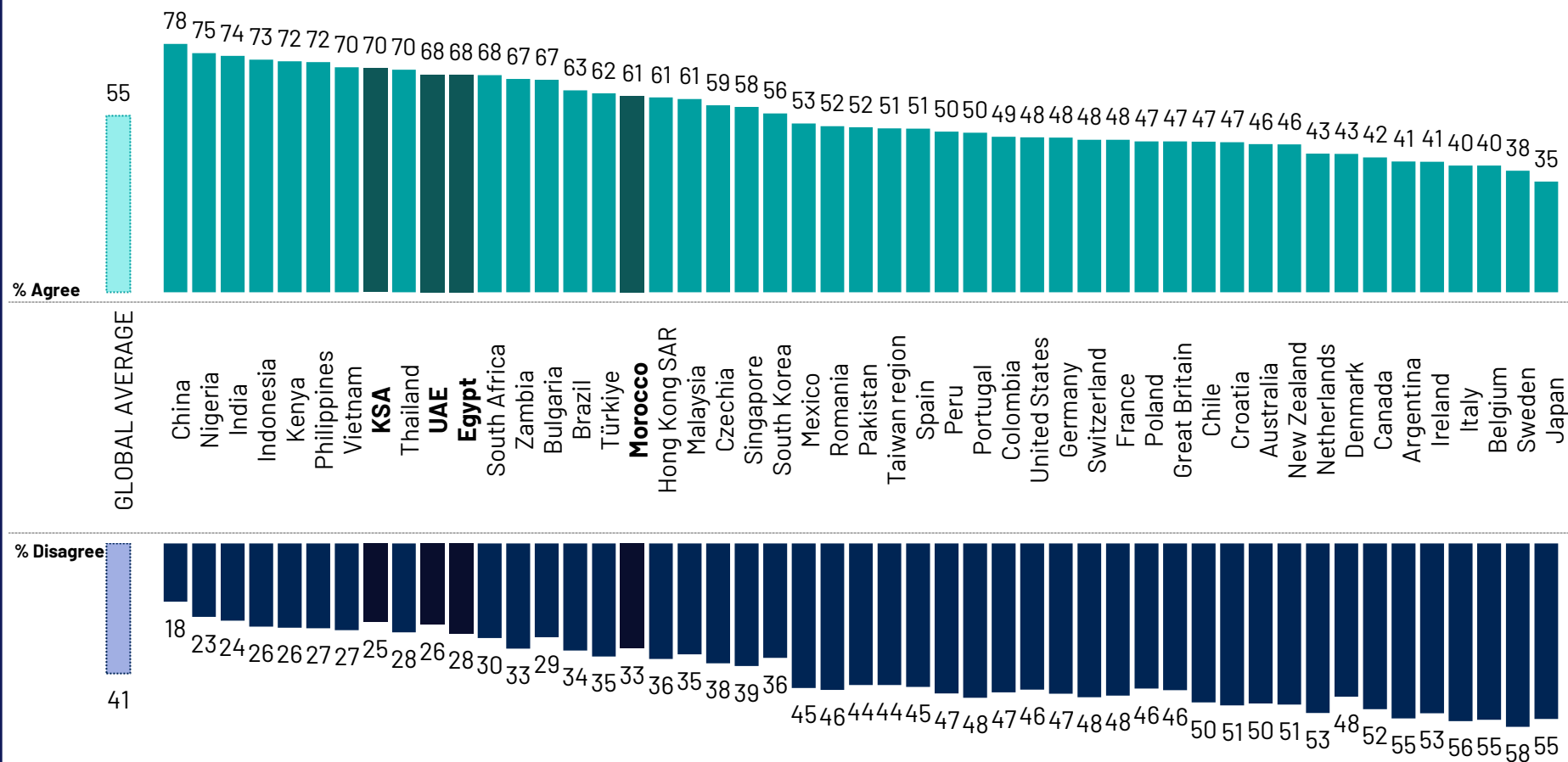
European markets predominate at the foot of the chart: disagreement is strongest in countries like Belgium, Sweden and Italy, alongside Japan.

At the other end of the scale are Asian and African markets, led by China where almost eight in ten say they are willing to spend extra for an appealing brand.

Yet most markets lie somewhere in between, suggesting that this mentality will vary between different products, occasions, and even brands.

I am generally willing to spend extra for a brand with an image that appeals to me

To what extent do you agree or disagree with the statement...



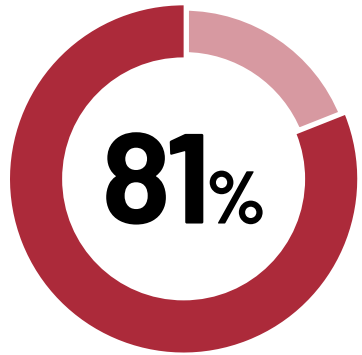
Base:

50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

Source:

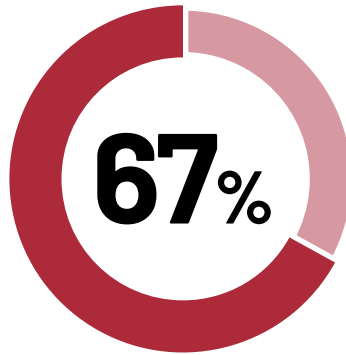
Ipsos Global Trends 2024

Regional Trust Perspectives in MENA Markets



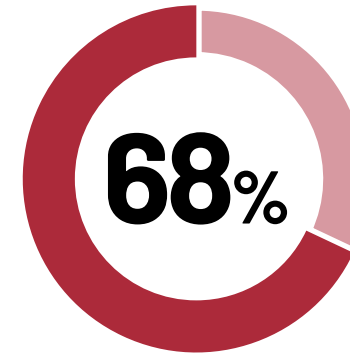
agree
“I am more likely to
trust a new product
if it’s made by a
brand I already
know”

In MENA, 81% of consumers trust new products from familiar brands, closely matching the global average. This trust is notably strong in **Egypt**, where **85%** favor known brands, and in the **UAE**, at **83%**. The importance of brand reputation plays a critical role in purchasing decisions, highlighting the need for brands to maintain and leverage their established reputation to attract and retain loyal customers in the region.



agree
“I am generally
willing to pay extra
for a brand with an
image that appeal
to me”

In MENA, 67% of consumers are willing to pay a premium for brands with appealing images, which is notably higher than the 55% global average, with **Saudi Arabia** leading at **70%**. This trend indicates a stronger consumer alignment with brand values in MENA, offering a valuable opportunity for companies to engage meaningfully. By resonating with consumer values, brands can build deeper connections and stand out in a competitive market, boosting customer loyalty and driving long-term growth.



agree
“Customer service
is getting too
automated and
impersonal”

While 71% of MENA consumers are willing to pay more for better experiences, 68% feel customer service is becoming too automated and impersonal, particularly in **Egypt**, where this sentiment is at **71%**. This situation presents a critical area for improvement, urging brands to focus on genuine and tailored customer experiences. By enhancing service quality, brands can cultivate trust and foster loyalty, aligning with consumer expectations in a world that is becoming more automated.

Driving Forces of The Power of Trust

Signals

Emirates NBD's "Live Teller" Service (UAE)

Emirates NBD introduced live teller services at ATMs, bridging the gap between digital banking and in-person customer support. This initiative enhances trust by offering customers personalized assistance and improving their banking experience.

Zara's Click & Collect Service

Zara's Click & Collect service allows customers to order online and pick up their items in-store, with a personalized touch. Store staff assist in finalizing purchases and handle any issues, enhancing customer trust in Zara's service reliability and customer care.

Almarai's Commitment to Transparency

Almarai offers clear, traceable product labeling, ensuring consumers understand the journey from farm to fork. Almarai also publishes detailed sustainability reports, showcasing its commitment to ethical sourcing, animal welfare, and environmental responsibility. This transparency fosters consumer trust and loyalty.

The most impactful Macro Force themes affecting this trend



Pervasive technology



Rising cost of living



Technology's dark side



AI and automation advances



Toll of technology

Escape to Individualism

Trend: In the face of a world that feels threatening and overwhelming, people are focusing on one thing they can control — themselves. While this focus on individualism has been high over the past decade, this year personal autonomy is the most powerful value. But this is, by definition, a multifaceted trend. We see the draw of simplicity, social status and seeking new experiences all as ways of developing ourselves.

Trend in MENA: MENA reflects the global movement toward prioritizing personal control and self-definition. Amidst rapid change, there is a pronounced desire for personal autonomy, as many feel overwhelmed and seek simplicity. This trend highlights the regional necessity for individuals to regain control over their lives in the face of uncertainty.

Tension: For some, self-development is about slowing the world down and avoiding the rush — yet for others it is about achievement and building social status. The balance of the strivers and the satisfied varies between and within nations.

Takeaway: As people focus on the things they can control in their lives, helping people express and project that sense of self and reinforce their own values sets up lots of opportunities for brands and policymakers alike. In MENA, providing simplified, meaningful experiences that align with individual values can resonate deeply.

Values

Autonomy
Seeking Curiosity
Simplicity
Social Status

A “me first” mindset of controlling what we can by expressing our identity and individualism

In the face of socio-political turmoil, existential climate threats, and growing worry about the world's future, people's focus on themselves is continuing to grow in importance. Autonomy is the strongest value in our framework, and it is the engine that drives highly individualistic definitions of aspirations, goals and modes of behaviour. In MENA, personal autonomy holds significant importance amid rapid changes, with many seeking simplicity to regain control over their lives.

The tensions arise in the other values associated with this Trend which range from Social Status (how people express that, through milestones of career success or material gain) or Seeking curiosity with new experiences or Simplicity, rejecting those pressures and trying to return

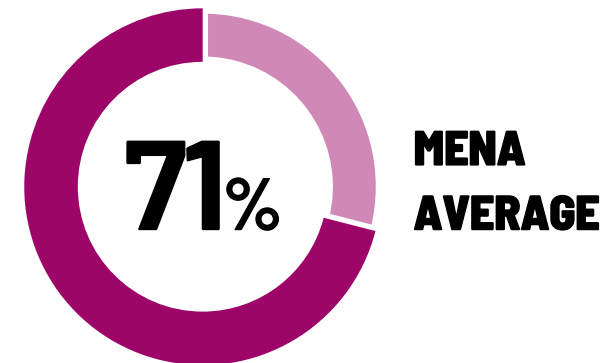
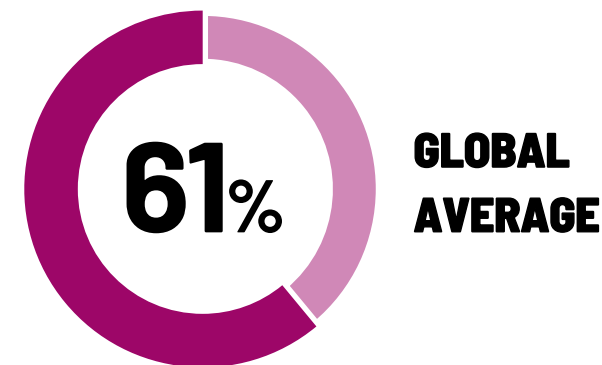
back to the basics. In MENA, the overwhelming pace of change, felt by 85% of individuals, amplifies the desire for simplicity and personal control, reflecting a regional urgency for stability.

For many, shaping one's own destiny is the ultimate sign of success. In MENA, this emphasis on personal autonomy reflects a broader desire to define one's path amidst uncertainty, balancing modern aspirations with cultural values. Globally, younger generations are more likely than older groups to equate material goods with success, highlighting a shift towards visible achievements.

The quest for autonomy is supported by technology, offering a range of choices but also overwhelming individuals with too much information

and uncertainty. This drives a desire for simplicity, control, and security. In both global and MENA contexts, this strong focus on the individual can be seen as a reaction to rising unpredictability and tension in the world. While it helps provide a sense of control and greater expression, there remains an important role for governments, businesses, and communities in supporting and building societies where individuals can thrive.

feel overwhelmed by too many choices in life



Escape to Individualism

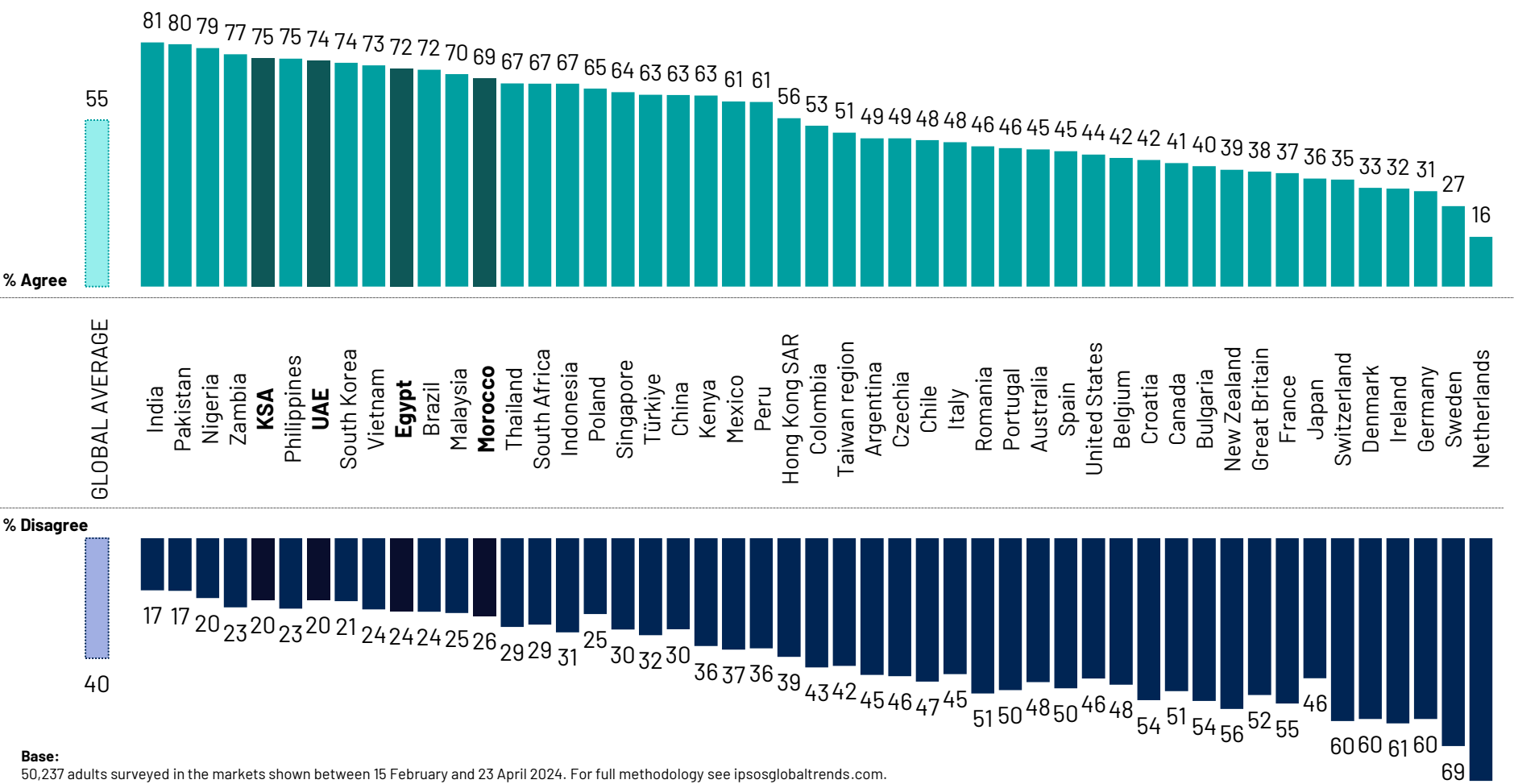
The world is divided on the importance of career success.

Just over half (55%) feel that fulfilment in life is achieving a prominent position in their career, while 41% disagree. Agreement is higher in Asian and African markets – most notably India, on 81% – and lower in European and developed markets, especially the Netherlands (16%).

Curiosity and openness to new experiences, such as travel, is perhaps a more universal path to individualism: 52% worldwide would consider moving to a different country to take a new job, while 67% of people say they would like to experience living in different parts of the world.

Fulfilment in life is achieving a prominent position in your career

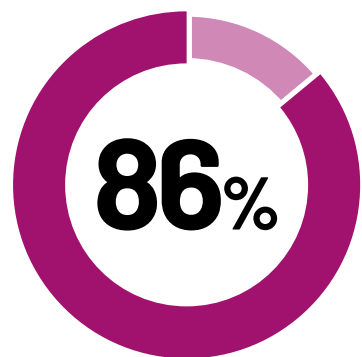
To what extent do you agree or disagree with the statement...



Base: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

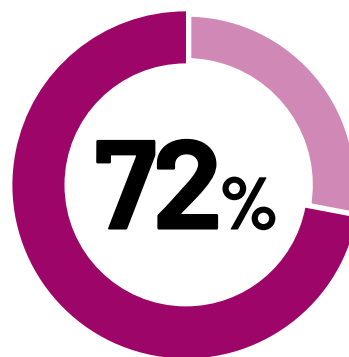
Source: Ipsos Global Trends 2024

Exploring Autonomy and Self-Development in MENA



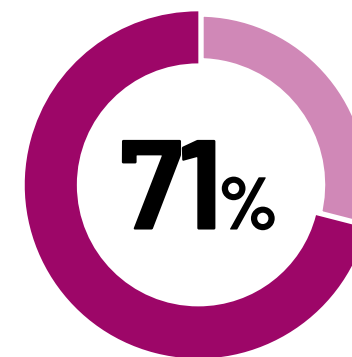
agree
**"The world today
is changing too
fast"**

In MENA, 86% express a strong desire for personal autonomy, reflecting the region's response to rapid changes and uncertainties. This sentiment is most evident in **Egypt (89%)** and the **UAE (88%)**, where individuals seek to regain control over their lives. The emphasis on autonomy highlights a collective pursuit of self-determination, as people navigate the complexities of modern life while balancing cultural values and the need for personal empowerment.



agree
**"Increasingly, I feel
the need to spend
time alone"**

In MENA, 72% of respondents feel the need to spend time alone, significantly higher than the global average of 60%, with **Egypt** leading at **77%**. This trend indicates a shift towards introspection and personal growth, as individuals prioritize mental well-being and self-reflection. The focus on self-development reflects a regional commitment to nurturing personal growth amidst external pressures, providing opportunities for brands to support consumers in their journey towards holistic well-being and self-improvement.



**feel
overwhelmed by
too many choices
in life**

In MENA, 71% feel overwhelmed by the abundance of choices, with **Egypt** showing the highest sentiment at **76%**. This feeling of being inundated highlights a desire for simplicity and clarity in decision-making. As consumers seek more meaningful and straightforward experiences, brands have the opportunity to offer solutions that align with individual values and reduce complexity, helping consumers navigate their options with ease and confidence.

Driving Forces of **Escape to Individualism**

Signals

Governmental Support for Entrepreneurship

Governments in the UAE and Saudi Arabia are fostering entrepreneurship through initiatives like the Mohammed Bin Rashid Innovation Fund and Saudi Vision 2030 programs, enabling individuals to start their own businesses and take control of their careers. Providing autonomy by empowering people to pursue independent livelihoods.

Mindfulness Apps by Local Platforms

Apps like Hekayti and Rafiq are gaining popularity by providing meditation, mindfulness exercises, and self-help content in Arabic. These platforms cater to the growing demand for self-reflection and mental well-being.

IKEA's Simplified Shopping Journey

IKEA in the UAE has introduced a "shop-the-room" experience online and in stores, where customers can purchase pre-curated setups, reducing decision fatigue while maintaining personal relevance and value.

The most impactful Macro Force themes affecting this trend



Identity acceptance



Employee power shift



Entrenched inequality



Rise and fall of middle classes



Wealth disparity

**GLOBAL
TRENDS**

FINAL THOUGHTS



You've reached the end of the IGT report.

What now?

That was a lot. We know.

Ipsos Global Trends summarises five million data points. It includes year-round work collecting signals and identifying macro forces from a truly global team of experts and analysts.

To recap at the highest levels:

There are constants. Throughout, we see values that strong majorities have agreed with over the last decade across markets, genders, ages, incomes and languages. We've identified three overarching themes and many other individual issues.

There are tensions at all levels.

Sociopolitical tensions about the very ideas of globalisation, tensions within markets, tensions between citizens and even tensions within households.

There are also tensions *within* each of the trends. Nostalgia is a shared value, and a powerful tool for bringing us together, but taken further, that idea can cause a rift between those who yearn for what they see as traditional values and others whose sense of identity is shifting.

Brands, businesses, organisations and governments have roles to play in everything from combatting global problems like climate change, to helping us express ourselves as individuals. Determining what those roles are and how to demonstrate you're playing them authentically is complicated.

As the world gets more complex, people focus on what they think they can control: themselves. People think they are doing all they can to solve

climate change, but most feel overwhelmed by the complexity of the world around them. Even if feeling overwhelmed is part of being human, it's still a powerful emotion that brands should be aware of and look to alleviate. One way: help people express themselves however they and their surrounding culture can.

That was insightful, but... now what?

Now comes the interesting part. Trends are holistic narratives that help to unearth opportunities and navigate potential threats, acting as compelling conversation starters and catalysts for within your organisation.

Yet, the multifaceted and sometimes paradoxical nature of trends can make them elusive and challenging to quantify. In contrast, by exploring the

human values underpinning each trend, we can quantify and rank their intensity, and truly apply them to your organisation so that you can act with intent.

So run a workshop. Role play. Take the data and tell a story about a persona you're trying to appeal to. Figure out how these trends apply to segments in your market. Know your audience, as these trends will apply differently to insights or innovation.

We present Ipsos Global Trends to get you thinking and give you tools to help you, too, understand society, markets and people today, and, through applied foresight, into tomorrow. It goes without saying, that Ipsos stands ready to help with any of those challenges — like the case studies we provide on the next page.

The Ipsos Global Trends – MENA Edition Author



Saad Masri

Author's Note

This report is a distillation of the broader research and analysis conducted by the Ipsos Global Trends team, with a specific focus on the aspects most relevant to the MENA markets. Drawing on over a decade of experience in researching the region, the work presented here has been shaped by extensive engagement with diverse clients and the management of complex, multi-country studies. This background has provided a unique perspective on the intricate market dynamics of MENA, enabling the translation of global insights into a narrative that speaks directly to regional realities.

The synthesis of extensive data and research presented here is the result of a deliberate effort to highlight key themes and their unique manifestations within the region. By merging global trends with localized analysis, this report offers a nuanced understanding of the forces at play in the MENA markets, while also reflecting the evolving cultural, economic, and social landscape of the region. It is hoped that this work provides valuable insights for all stakeholders and contributes meaningfully to the dialogue around market trends in MENA.

**GLOBAL
TRENDS**

TECHNICAL INFORMATION

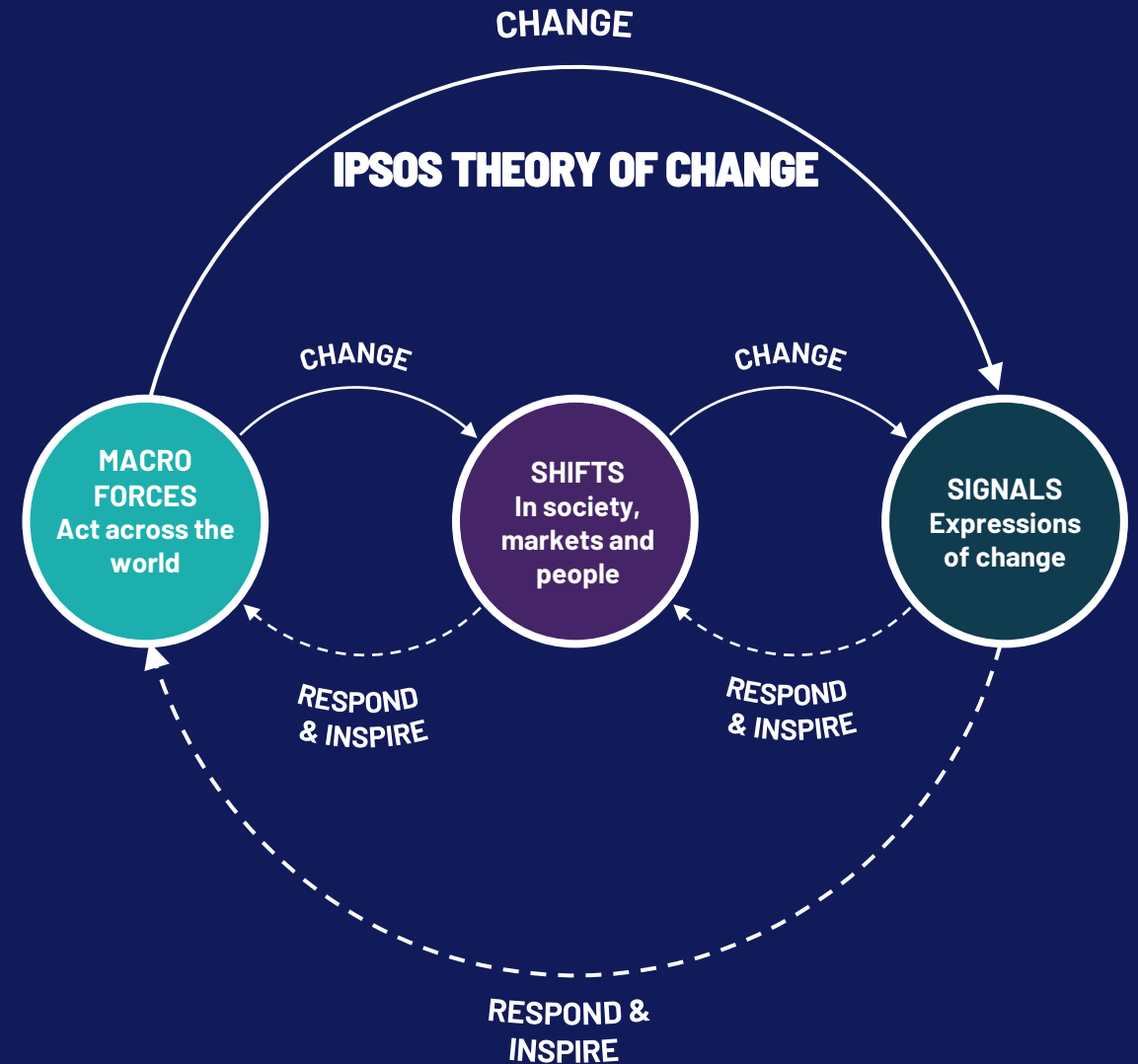


Ipsos's Theory of Change helps us look at how change happens across several levels

We used this model to refresh our Trends framework this year, building nine Trends from an analysis of each level of change.

- **Macro Forces** are the “known knowns” that operate at a planetary level. They work over a longer time horizon and have far-reaching, sometimes measurable or forecastable, impacts. They are the context against which people and organisations act.
- At the other end of the scale, **Signals** are localised expressions of change. They are things that we can observe occurring at the level of a single country or a community within a specific area, such as a new product launch in India, or a new cultural phenomenon in Japan.
- In the middle, we have **Shifts** in society, markets and people, including opinions, attitudes and values. Shifts can emerge, enter mainstream culture, and fall out of practice in response to macro forces and signals.

Our model acknowledges the **role of feedback loops in understanding the complexity of our world, recognising the circular nature of change** and tension within this ecosystem allows us to develop robust trends.



Understanding shifts in human values

Values can be understood as the core principles that define an individual's personality, guide their actions in life, and are essential for a meaningful and orderly existence. They have been statistically developed using a factor analysis of the 99 agree/disagree statements in our questionnaire.

Our Value Intensity Ranks and Scores **reveal which Values most or least unite humans around the world.**

These measures are calculated using the mean agreement or disagreement scores for each statement within a Value. This provides an overarching gauge of the relative intensity of each Value, which we can then rank.

Trend	Value Name		Global Intensity Score	Global Intensity Rank
Escape to Individualism	Autonomy	Values most likely to unite us ↑	79	1
Conscientious Health	Health Self-Reliance		78	2
The Power of Trust	Informed Consumerism		76	3
Splintered Societies	Wealth Redistribution		76	4
Conscientious Health	Health Improvement		76	5
Climate Convergence	Climate Responsibility		74	6
The Power of Trust	Brand Worship		68	7
Technowonder	Technological Worry		64	8
Escape to Individualism	Simplicity		64	9
Nouveau Nihilism	Living In The Moment		63	10
Technowonder	Technological Fatalism		63	11
Nouveau Nihilism	Anti-establishment		62	12
Globalisation Fractures	National Pride		62	13
Escape to Individualism	Seeking Curiosity		62	14
The Power of Trust	Experience		61	15
Technowonder	Technological Optimism		61	16
Splintered Societies	Nativism		58	17
Globalisation Fractures	Global Outlook		56	18
Retreat to Old Systems	Nostalgia		44	19
Escape to Individualism	Social Status		44	20
Retreat to Old Systems	Traditionalism		43	21
Conscientious Health	Longevity	Values least likely to unite us	38	22
Splintered Societies	Equity		26	23

Ipsos' Macro Forces

The external context, against which people and organisations act, can be distilled into six Macro Forces and related themes. While they do not act in isolation, our framework is a starting point to discuss and debate the consequences of the external environment for your organisation.



Societies in flux



Tech-celeration



Economic disparities



Environmental emergencies



Political splintering



Wellness revolution



Population fluctuation



Pervasive technology



Rise & fall of middle classes



Climate change



Rising nationalism & populism



Systemic health inequality



Community migration & displacement



The immersive frontier



Employee power shift



Loss of biodiversity



Technology's dark side



Breakthrough therapies



Life stage & family evolutions



AI & automation advances



Wealth disparity



Sustainable growth



Rethinking institutions



Integration of health & technology



Greater ethnic & religious diversity



Exponential data



Rising cost of living



Resource depletion



Increasing geopolitical conflicts



The next pandemic



Identity acceptance



Toll of technology



Alternative value structures



Entrenched inequality

The markets in the 2024 survey

Argentina
Australia
Belgium
Brazil
Bulgaria
Canada
Chile
China
Colombia
Croatia
Czechia
Denmark
Egypt

France
Germany
Great Britain
Hong Kong SAR
India
Indonesia
Ireland
Italy
Japan
Kenya
Malaysia
Mexico
Morocco

Netherlands
New Zealand
Nigeria
Pakistan
Peru
Philippines
Poland
Portugal
Romania
Saudi Arabia
Singapore
South Africa
South Korea

Spain
Sweden
Switzerland
Taiwan region
Thailand
Türkiye
United Arab Emirates
United States
Vietnam
Zambia

Survey Methodology in detail

These are the results of a 50-market survey conducted by Ipsos on its Global Advisor online platform and in partnership with other global Ipsos teams around the world. The survey was conducted using Ipsos Online panels in all markets except for India which used its mixed-method "IndiaBus", and Zambia which used a face-to-face methodology. Ipsos interviewed a total of 50,237 adults aged 18-74 in the United States, Canada, Hong Kong SAR, Malaysia, New Zealand, South Africa, Türkiye and Vietnam; 20-74 in Thailand; 21-74 in Indonesia and Singapore; and 16-74 in all other markets between Thursday, February 15 and Wednesday, April 23, 2024.

The sample consists of c.1,000 individuals in each of Argentina, Australia, Belgium, Bulgaria, Brazil, Canada, Chile, mainland China, Colombia, Czechia, Croatia, Denmark, Egypt, France, Germany, Hong Kong SAR, India, Indonesia, Ireland, Italy, Japan, Kenya, Malaysia, Mexico, Morocco, Netherlands, New Zealand, Nigeria, Pakistan, Peru, Philippines, Poland, Portugal, Romania, KSA, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan region, Thailand, Türkiye, United Arab Emirates, Great Britain, the United States, Vietnam and Zambia.

The samples in Argentina, Australia, Belgium, Bulgaria, Canada, Croatia, Denmark, France, Germany, Great Britain, Ireland, Italy, Japan, the Netherlands, New Zealand, Poland, Portugal, South Korea, Spain, Sweden, Switzerland, Taiwan region, the United States and Zambia can be taken as representative of their general adult population under the age of 75.

The samples in Brazil, Chile, mainland China, Colombia, Czechia, Egypt, Hong Kong SAR, India, Indonesia, Kenya, Malaysia, Mexico, Morocco, Nigeria, Pakistan, Peru, Philippines, Romania, KSA, Singapore, South Africa, Thailand, Türkiye, the UAE, and Vietnam are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

Apart from Zambia, the data for all countries is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

"The Global Market Average" reflects the average result for all the countries and markets where the

survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

For information or assistance about this please contact GlobalTrends@ipsos.com

**THANK
YOU**

Contact us with any questions you may have:
Saad.Masri@ipsos.com