

**Challenges and opportunities facing the sporting events  
industry in Qatar**

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## Table of Contents

1. Introduction	4
2. Detailed discussion on sporting event industry Qatar	5
2.1 Background on events	5
2.2 Government vision and strategies	9
2.3 Current status of the sporting event industry	13
2.4 Challenges in the sporting event industry	19
2.5 Opportunities and recommendations	28
3. Conclusion	31
4. Bibliography	34
5. Teaching Case	38
6. Appendices	43
6.1 Appendix Annual sporting events held in Qatar	43

## **Acronyms and abbreviations**

FIFA	Federation Internationale de Football Association
GCC	Gulf Cooperation Council
IOC	International Olympic Committee
MENA	Middle East and North Africa
MDPS	Ministry of Development, Planning and Statistics
MOCS	Ministry of Culture and Sports
OECD	The Organization for Economic Co-operation and Development
QFA	Qatar Football Association
QNV 2030	Qatar National Vision 2030
QOC	Qatar Olympic Committee
QSL	Qatar Stars League
QTA	Qatar Tourism Authority
TVET	Technical and Vocational Education and Training
UAE	United Arab Emirates
SC	Supreme Committee for Delivery & Legacy

## **1. Introduction**

This report explores the sporting events industry in Qatar, focusing on key challenges and opportunities facing the industry. The report generates a longlist of industry specific challenges and concentrates on three major challenges namely, establishing Qatar as a major event destination in the region, creating a sustainable industry and developing human capital. Moreover, the report will set out opportunities in the industry, analyze potential areas for improvement and recommend solutions to turn challenges into opportunities.

The key objective of the report is to explore the notion of Qatar emerging as an international sporting event destination in the run-up to world's biggest event - the 2022 FIFA World Cup™ - and its potential legacy for Qatar and the region. The report makes comparative analysis to mainly United Arab Emirates (UAE), as it is Qatar's main competition in hosting sporting events with references to Gulf Cooperation Council countries including Saudi Arabia, Oman and Bahrain.

The report will start with a background on events, followed by government's vision and strategies for the industry. It will explore the status of the sporting event industry in the region and provide a detailed discussion of challenges and opportunities faced by the sporting event industry. Finally, it will be concluded by presenting a set out recommendations and a teaching case study.

## **2. A detailed discussion on the sporting event industry**

### **2.1 Background on events**

Masterman (2014) states that the origins of modern sports events can be dated back to ancient Greek, Chinese and Egyptian cultures. Masterman (2014) found that throughout history, “sports events played an important role in the development of societies” (p.38). Today, sports have become an industry with a global importance economically, politically, socially and technologically. Sports events have been at the “forefront of most government events strategies and destination marketing programs” mainly due to their “ability to attract tourist visitors, generate media coverage” and positive economic impact. (Bowdin, Allen, O’Toole, Harris &McDonnell, 2011, p.24).

UK Sport (2004) classifies sporting events into various types such as Type A Mega events, Type B calendar events, Type C one-off events and Type D showcase events as described in Table 1 below (as cited in Bowdin et al., 2011).

<b>Type A</b>	Mega events: Irregular major international spectator events generating significant economic activity and media interest. Examples includes the Summer Olympics, the Paralympics Games and the FIFA World Cup.
<b>Type B</b>	Calendar events: Major spectator events generating significant economic activity, media interest and part of an annual domestic cycle such as FA Cup Final.
<b>Type C</b>	One-off events: Irregular one-off major spectator/competitor events generating an uncertain level of economic activity such as Grand Prix Athletics.
<b>Type D</b>	Showcase events: Major competitor events generating little economic activity and part of an annual cycle such as national championships in most sports.

Table 1: Type of Sporting Events

*Source: UK Sport (as cited in Bowdin et al., 2011)*

Matheson (2010) states that strategic planning for the legacy around sports events is a new phenomenon, which has recently gained more importance. Beesley and Chaplin (2011) argues that event benefits can be enhanced “if strategic planning and implementation are employed to leverage the opportunities that events enable” (Beesley and Chaplin, 2011, p.1). After analyzing the experience from over 30 host cities and nations, The Organization for Economic Co-operation and Development (OECD) has developed a framework that sets out the benefits of hosting international events. Table 2 shows the summary of the OECD’s findings which is categorized based on primary benefits and secondary benefits.

No	Primary Benefits	Secondary Benefits
1	Alignment of the event with sector and business growth strategies in the city or nation.	Post event usages of improved land and buildings.
2	Private-public investment partnerships.	Connectivity and infrastructure legacies.
3	Image and identity impacts attracting increased population, investment, or trade.	Labor market impacts and social/economic inclusion.
4	Structural expansion of visitor economy and supply chain development and expansion.	Secondary impacts in the property market.
5	Environmental impacts, both in built and natural environments.	Global positioning, events strategy going forwards, and project management capability.

Table 2: Benefits of Hosting International Events

*Source: OECD (2010)*

The impact of hosting a mega event can be described as a legacy which is generally viewed as being positive by the host population (VisitScotland 2012). As described in Table 3, Legacy includes a broader evaluation of the ‘hard’ or tangible legacies and softer, less tangible legacies in the economic, human, social and environmental spheres at a local, national, regional and global level. However, it is important to note that if a country misses out on capturing hard and soft legacy benefits then the event can leave a negative impact as seen in the case of the Athens 2004 Olympics, with many venues being underutilized and left in poor condition.

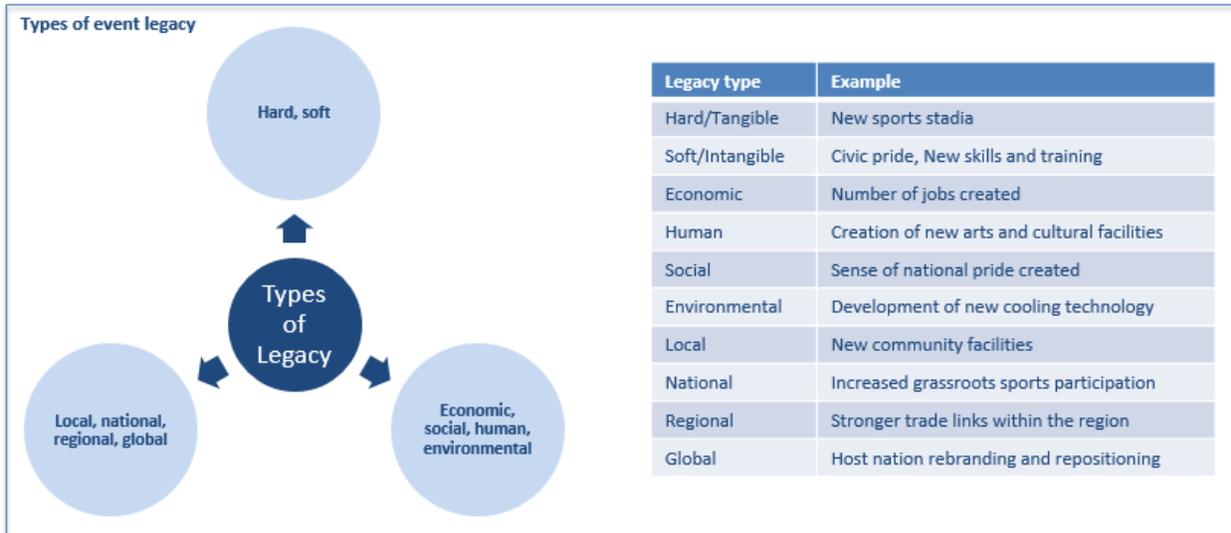


Table 3: Types of Event Legacy  
 Source: Adapted from MacRury (2009)

In Qatar’s case, hosting of the 2022 FIFA World Cup provides a clear milestone for the implementation of hard legacy investments in sporting infrastructure and the wider host country infrastructure investments such as roads, transportation networks, hotels and services (Qatar National Bank, 2014, p.1). In addition to these hard legacy investments in Qatar, as part of its bid commitments the organizing committee plans to donate modular seats to develop footballing infrastructure in developing nations. (Supreme Committee for Delivery and Legacy: Legacy Book 2016).

Qatar has ambition to achieve a wide range of soft legacy outcomes from hosting the 2022 FIFA World Cup™ including transforming the image of Qatar and the region, increasing global awareness of the country as a nation branding strategy, creating an attractive destination for tourists for years beyond the event, building institutional capacity in tournament operations and readiness through country-wide coordination

across different government agencies to host this mega event, using sports as a diplomacy/soft power tool to increase its political and socio-cultural influence and utilizing football as an education tool to positively impact vulnerable communities across the globe. However, the benefits of hosting sporting events cannot be fully realized without a clear government vision, strategy, political will and financial resources.

## **2.2 Government vision and strategies**

Government's vision and political will to implement its vision are fundamental for creating a sustainable sports events industry. At the highest level, the country needs a national vision as set out in the Qatar National Vision 2030. All of the GCC countries included in Table 4 had a long-term development vision. National vision cascades down to the national development strategy (e.g. National Development Strategy 2011-2016 for Qatar) which sets out initiatives and strategies to achieve the long-term vision of the country. National development strategy is followed by sector-specific strategies such as sports and tourism strategies<sup>1</sup>. Most of the GCC countries on the list had a tourism and sports strategy. (See Table 4). The sector-wide visions are then broken down at an organizational level where sporting bodies in Qatar set their goals to align with national goals such as Qatar Olympic Committee's (QOC) vision for "Qatar to become a leading nation in bringing the world together through sustainable sport development" (QOC website).

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<sup>1</sup> The reason for referencing tourism strategies is that tourism and sport events sectors have a symbiotic relationship and should be viewed together as sports events can drive tourism in the country and wider tourism strategies can impact the sports events industry.

Countries listed in Table 4 have identified sports as an area to promote in the future, stating hosting of international sporting events as one of their main goals in their Sports and Tourism strategies. It can be concluded that governments in the region are interested in promoting tourism and sporting events.

GCC Country	National Development Strategy	Sports Strategy	Tourism Strategy	Comments
Qatar	□ Qatar National Vision 2030	□ Qatar Olympic Committee (QOC) Sports Sector Strategy 2011-2016 Culture and Sports Sector Strategy 2017-2022	□ Qatar National Tourism Sector Strategy 2030	QTA tourism strategy and QOC sports strategy includes hosting of high-profile sports events as a main area of focus for Qatar.  Ministry of Culture and Sports (MOCS) was created in 2016 merging the Ministry of Culture, Arts and Heritage with Ministry of Youth and Sports. MOCS developed the Culture and Sports Sector Strategy which seeks to make sports and culture part of daily activities of Qatari youth.

<b>UAE</b>	<p>□</p> <p>UAE Vision 2021 Dubai Plan 2021 Abu Dhabi Economic Vision 2030</p>	<p>□</p> <p>Dubai Sports Council Strategic Plan 2011-2015 Abu Dhabi Sports Council</p>	<p>□</p> <p>Tourism Vision 2020 Dubai Tourism Strategy 2020</p>	<p>Dubai sports council have been developing strategic plans since 2007. Abu Dhabi Sports Council has an annual sports events calendar. One of the strategic priorities of the sports council is creating opportunities for sport tourism and hosting international tournaments.</p>
<b>Kuwait</b>	<p>□</p> <p>Kuwait National Development Plan</p>	<p>□</p> <p>Sustainable Cities and Youth Strategy Public Authority for Sport</p>	<p>□</p> <p>Supreme Commission for Tourism – Kuwait Tourism Strategy</p>	<p>Kuwait’s Sustainable Cities and Youth Strategy promotes integration of sports into urban planning through sustainable sports facilities. UNDP is supporting Kuwaiti Public Authority for Sport (PAS) in developing a ‘Sports for All’ strategy, increasing youth engagement, the number of sport facilities and increasing national participation in Olympic championships.</p>
<b>Oman</b>	<p>□</p> <p>Vision 2020 Oman 2040</p>	<p>□</p> <p>Omani Sports Strategy 2009</p>	<p>□</p> <p>Oman Tourism Strategy 2040</p>	<p>The first Omani sports strategy was developed in 2009 and its main pillar is ‘sports for all’ to promote sport participation at all levels within the short to medium term.</p>

				In 2016, Oman developed a 25-year long-term tourism strategy that ties into the country's wider development vision 2040.
<b>Bahrain</b>	□ The Economic Vision 2030	□ Detailed Strategic Plan 2012-2016	□ Bahrain Tourism Strategy 2015-2018	The national youth strategy for Bahrain was developed in collaboration with UNDP and General Organization for Youth and Sport (GOYS) Bahrain to promote 'Sports for All'.
<b>Saudi Arabia</b>	□ Saudi Vision 2030	□ National School Sports Strategy	□ Tourism General Strategy	The National School Sports Strategy is an initiative lead by the Ministry of Education in Saudi Arabia to increase in youth & female participation in sports and does not include aspects of hosting sporting events related to the industry. A revised tourism strategy in 2014 implemented by the Supreme Commission for Tourism mainly focuses on religious tourism but most recently in 2019 opened the country international tourism.

Table 4: Summary of GCC (excluding Kuwait) government national development strategy, sports strategy and tourism strategy

Source: Author

The focus on tourism and sports by the governments in the region should be evaluated in the context of wider economic diversification efforts to shift the

hydrocarbon based economy to a more services and knowledge-oriented economy. The sports and tourism industries will continue to grow and play a greater role in future for those countries that manage to seize the opportunities to diversify.

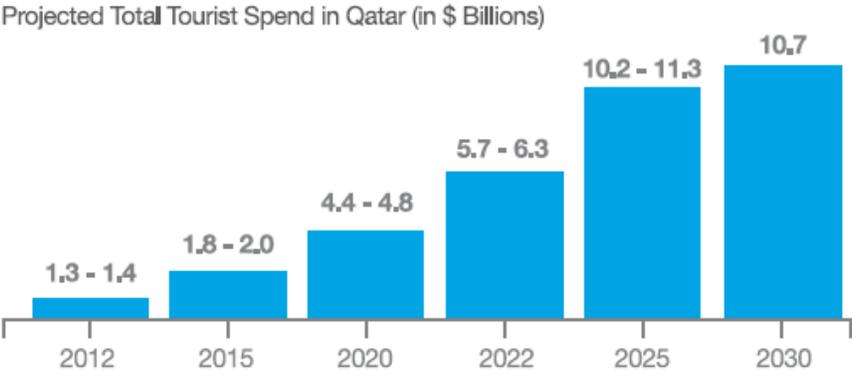
### **2.3 Current status of the sporting event industry**

The current status of the sporting event industry in Qatar and selected countries from the GCC will be analyzed through identifying the following: sports tourism industry, type and nature of sporting events held in the region, the number and frequency of sporting events and the top sports in terms of following in the region.

Sports tourism is a growing part of the global travel and tourism industry. Sporting events promote sports tourism and have a large impact on the economy. Value generated from hosting sporting events spill over to the wider economy including areas such as travel organization, transportation, accommodation, F&B, sporting facilities and support services.

In Graph 1, Qatar Tourism Authority (QTA) estimates that tourism arrivals to Qatar will grow to 7 million arrivals by 2030 and the total tourist spend in Qatar will reach USD \$10.7 billion (Qatar National Tourism Sector Strategy 2014). Industry estimates suggest that sports tourism is between 4-10% of the total tourism market. Based on QTA tourism estimations for 2030, sports tourism will generate between

280,000 and 700,000 visitors to Qatar, spending between US\$428 million and US\$1.07 billion per annum by 2030.



Graph 1: Projected Total Tourism Spend in Qatar (in \$ Billions)  
*Source: Qatar National Tourism Sector Strategy 2030 (2014)*

The type and nature of international events held in Qatar as well as the major events scheduled to be hosted in the country are listed in Table 5. Details of annual sporting events held in Qatar can be found in Appendix 1.

<b><u>Major Future Sport Events in Qatar</u></b>	
2016 - UCI Road Cycling World Championships 2018 - FIG Artistic World Gymnastics Championships 2019 - World Athletics Championships 2022 - FIFA World Cup	 
<b><u>Annual International Sporting Events</u></b>	
since 1993 - ATP Tennis Tournament doha since 1998 - Commercial Bank Qatar Masters since 2004 - FIM MotoGP motorcycle race Since 2005 - UIM F1H2O World Championship since 2008 - FEI Equestrian Global Champions Tour since 2008 - WTA Tour Tennis Championships since 2009 - FIVB Club World Championships since 2010 - IAAF Diamond League since 2010 - IHF Handball Super Globe	  

Table 5: Annual international sporting events and major future sports events in Qatar

Source: Author

Table 5 shows that over the past 20 years, Qatar has been able to build up a portfolio of annual international sporting events as well as securing rights to host major sporting events in the future. Qatar is actively searching to host even more high-profile international sporting events. According to BBC (2015), Qatar's state-backed wealth fund, Qatar Sport Investment, is planning a bid for the controlling stake for Formula 1 racing in an attempt to bring the sport to Qatar. On the other hand, QOC have made two un-successful bids for Qatar to host the 2016 and 2020 Summer Olympics but announced that it will continue bidding in the future. It is clear that Qatar has developed annual events and festivals in line with the National Tourism Sector Strategy and the QOC Sports Sector Strategy. Statistically, Qatar hosted over 180 events in 2014, out of which 84 were sporting events (Josoor Institute 2015 & Fahmy 2015). Between April 2015 and March 2016, Qatar was expected to host 89 local, regional and international

sporting events (Fahmy 2015). Fahmy stated that the number of international athletics events hosted by Qatar also increased to a total of 55 – an increase of 22% from last year. Based on the latest major sports and events calendar published by Qatar Olympic Committee, Qatar is set to host 65 local, regional and international sporting events in 2020 thus further demonstrating Qatar's continuous rise as a major host nation for sports.

Similarly to Qatar, Dubai has also been associated with sporting events for decades. The Dubai World Cup has been held annually since 1996 and is regarded as the world's richest horserace event (Smith 2014). DP World Tour Championship European Tour golf tournament, Dubai Sevens annual rugby union tournament, Dubai Tennis Championship and the national cricket fixtures of the Pakistani cricket national team are among the highlights of the Dubai sporting calendar. Economic impact of the 2013 DP World Tour Championship alone was measured to be around USD \$44 million (Szreter 2014). Dubai hosted 143 sporting events (major, international and local), 53 of which are international sporting events according to Deloitte (2015).

The capital of UAE, Abu Dhabi, has a busy sporting events calendar with 100+ of local, regional and international sporting events and was in 2019 awarded the World's Leading Sports Tourism Destination at the 26th edition of the World Travel Awards in Muscat. Abu Dhabi has been a home to UIM F1H2O World Championship in powerboat racing since 1993, the F1 Abu Dhabi Grand Prix since 2009 and the Abu Dhabi Golf

Championships since 2006. The emirate of Sharjah in UAE has had its share of sporting events alongside the other emirates, with annual hosting of national cricket fixtures of the Pakistani cricket team and UIM F1H2O World Championship in powerboat racing.

In the sporting event industry, Bahrain is best known for the annual hosting of the Bahrain F1 Grand Prix, which has taken place since 2004. The economic impact of the 3-day Bahrain F1 Grand Prix is estimated to be USD \$ 1 billion (The Manila Times 2015). Bahrain also held the World Volvo Golf Championship before it eventually moved to South Africa. This shows that the region is not only competing within itself but also against countries around the world to host international sporting events. In conclusion, analysis of the type of events hosted in the region shows that the region is competing to host the same type of sporting events, like tennis, golf, motorsports, horse and powerboat racing.

Saudi Arabia's Tourism Authority website lists a limited number of sports events (totaling 8) most of which have cultural content.<sup>2</sup> However, Saudi Arabia is certainly trying to attract more international sporting events and has ramped up its active bidding and hosting of sporting events in the last few years. The country most recently hosted the Italian Super Cup in 2018 and 2019, International Handball Federation's (IHF) club world championship – the IHF Super Globe - in 2019 and the world Heavy Weight

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<sup>2</sup> Including Tabuk-Khail and Hail Festival that features horse and camel racing, Saudi Hawks Team Shows, King Abdullah bin Abdul-Aziz Show Jumping Festival and sailing boat events for youth. None of the sporting events held in Saudi Arabia.

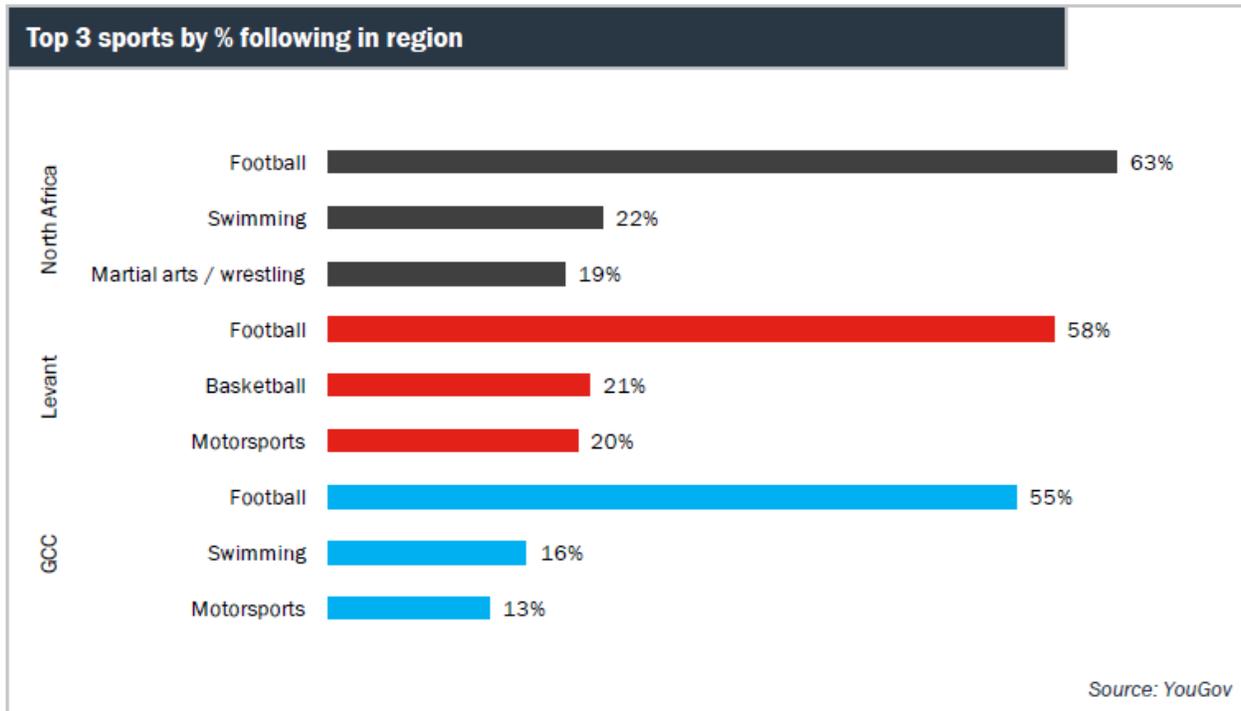
Championship boxing match between Andy Ruiz and Anthony Joshua. It has also featured in golf's DP World Tour since 2019.

Oman has a lower profile than some of its Gulf neighbors in terms of international sporting events hosted in the country. Its current portfolio of international sporting events includes the Tour of Oman, professional road bicycle racing as part of UCI Asia Tour (since 2010). Most recently it has added golf's DP World Tour to its calendar.

In conclusion, analysis of the type of events hosted in the region shows that the region has similar ambitions to use sports as part of wider country and tourism agendas as described in Appendix 1 but in the most part that countries are competing to host the same type of sporting events - in tennis, golf, motorsports, horseracing and powerboat races. The FIFA World Cup 2022™ can be described as a disruptive force that separates Qatar from the rest of the Gulf neighbors with similar hosting aspirations, due to the event's magnitude and that this is the first time the tournament has ever been hosted in the GCC or wider MENA region.

In order to develop an in-depth understanding of the sporting event industry in the region, one must also look at the market demand for sporting events in terms of viewership. Research shows that football tops the list as the Middle East and North Africa (MENA) region's favorite sport in terms of number of spectators and participation

in the sport. (SMG Insight 2011). Graph 3 shows that football is followed by swimming as the second favorite sport in terms of spectators in GCC and North Africa.



Graph 2: Top 3 sports by following in the MENA region

Source: SMG Insight (2011)

It is interesting to note that the sports with the most following in the GCC such as football, swimming, motorsports, basketball, volleyball, athletics, tennis and horse racing, have all been hosted in Qatar. This alludes to a careful planning and bidding for events that are popular in the region.

## 2.4 Challenges in the sporting event industry

The sporting events industry in Qatar and the region faces a series of challenges with varying impacts on the industry. A long list of challenges was created and based on individual research and discussions with experts from the industry, and challenges

deemed to be the most important were shortlisted. The long list of sporting event industry challenges includes commerciality/financial feasibility, limited market demand, creating a destination, culture, perception of the region, security, climate, human capital, environmental sustainability, and underutilization of venues. The challenges are not only related to the sporting event industry but to the wider event industry in the region. The short-listed challenges are as follows:

1. Establishing a country as a sporting event destination in the region
2. Creating a sustainable sporting event industry
3. Developing human capital in the sporting event industry.

Table 6 shows the long list of challenges as well as highlighting the short-listed challenges with a star to be later discussed in more detail. It is important to note that the shortlist combines both commercial feasibility and market demand challenges into one heading, titled 'sustainable event industry'.

Area	Challenges
<b>Commerciality &amp; financial feasibility*</b>	Currently, sporting events hosted by the state of Qatar are not profitable and rely on government subsidies. Qatar Stars League (QSL) clubs do not make enough revenue to cover large operating expenses. QNCC, the most prestigious convention center in Qatar backed by the state has been making loss since it opened in 2011 as revealed by discussions with QNCC staff.
<b>Market demand*</b>	There is low attendance in sporting events hosted in Qatar including football matches which is the region's most popular sport (e.g. QSL games have around 1000 spectators per game in stadiums with 12,000 capacity). In last year's Moto GP World Championship in Qatar there were around 200 spectators.
<b>Creating a destination*</b>	Establishing the region as an event destination is a major challenge which requires long-term commitment into developing the identity, key infrastructure and unique offerings for the destination including calendar of events.
<b>Culture</b>	In Saudi Arabia, culture presents a challenge to bid for certain big international events such as Olympics as it is a taboo for women to compete in or attend sporting events. For example, Saudi Arabia proposed to host male-only Olympics in the country and the women sports to be held in Bahrain. (Cohen 2015) Culture does not present similar challenges for hosting sporting events in the case for Qatar, UAE, and Bahrain.
<b>Perception of the region</b>	The negative perceptions/stereotypes of the region can present a challenge to attract visitors to the region. Due to present circumstances, there is a lot of media coverage of war, terrorism, and corruption related news about the region.
<b>Security</b>	Security in the wider region is a major concern. Even though GCC countries are regarded as some of the safest countries in the world, one act of terrorism can discount years of promoting the region as a tourism and sporting event destination.
<b>Climate</b>	During the summer, the region experiences temperature up to 50°C, making it too hot for any type of outdoor sporting activities.
<b>Human Capital*</b>	Due to an increase in number of events and tourism offerings, there is an internally driven requirement to develop tourism and event related human capital. The region's human capital challenge has a large subset of challenges including: lack of policy framework, lack of TVET (Technical and Vocational Education and Training) institutions focusing on the tourism and events industries, lack of appropriate programs to address sector specific labor challenges, low participation of local citizens in the industry, low retention rates and high cost of human capital in the industry.
<b>Environmental Sustainability</b>	Sporting events can have negative impacts on the environment through use of resources, creation of emissions and waste during construction of large sporting infrastructures, transportation to and from the events, and the event operations.
<b>Underutilization of venues</b>	There will be 8 new state of the art football stadiums built for the World Cup on top of the existing stadiums and the 3 newly built indoor arenas for the handball tournament. Underutilization of the large sporting venues in Qatar will be a critical challenge considering millions of riyals have to be spend to up keep stadiums and the potential reputational damages if venues are not used after major events.

Table 6: Long List of Sporting Event Industry Challenges in Qatar with references to selected countries from the GCC

Source: Author

Note: 1. \* indicates challenges that are shortlisted to be explored in more detail.

Establishing Qatar as a sporting event destination in a highly globalized and competitive market is identified as the main challenge facing the industry. It takes not just the efforts of the events industry but the country as a whole to promote the country as a destination. There are external and internal challenges to establish the region as a sporting destination. The external challenges are exacerbated by the global nature of the events industry. Competition to host sporting events does not just exist within the region's top destinations such as Dubai, Abu Dhabi and Doha but at a global level against more established event destinations such as USA, UK, France and even South Africa.

Established destinations have long traditions of hosting events (e.g. the Tour de France was first held in 1903 and Formula 1 has its roots in European Grand Prix from the 1920s) and enjoy the benefits of existing sporting infrastructure. Moreover, the majority of the global sporting events are produced in the West and then exported to the rest of the world. The major sporting events are played based on the rules established by the sporting bodies based in Europe and USA (e.g. both FIFA and IOC are based in Switzerland), which also hold the rights to award the events. Internally, the region is faced with limited market demand and the lack of established leagues drawing large audiences effects the commercial viability of sporting events.

Creating a sustainable sporting event industry is more difficult in smaller countries like Qatar and Bahrain which have a small population, a large proportion of blue-collar workers and low tourism numbers. Based on Planning and Statistics Authority (PSA) data (2019), the population of Qatar in Dec 2019 was 2.68million, with about 66% of the labor force having limited skills and/or being unskilled. Most of the blue-collared are single male laborers that are not traditionally the target demographic for attending sporting events. In the UAE, market demand seems to be a less of a challenge due to a larger population (9.89 million according to World Bank 2020 figures), larger number of leisure tourists and a bigger group of white-collared expats and Emiratis.

In Qatar, the limited market demand for sporting events are best demonstrated by low attendance at QSL games in particular, but also include the opening games of ATP tennis tournament, powerboat racing and Moto GP to name the few. A survey conducted by the MDPS in 2014 on the reasons for low attendance to football matches in Qatar found that 69% of the respondents stated traffic was a significant reason for audience to not attend games in stadiums. Over the years only a handful of sporting events held in Doha have managed to secure large attendances - such as Argentina vs Brazil friendly in 2010 (approx. 52,000 in attendance), Real Madrid vs PSG in 2014 (approx.40,000 in attendance) and Diamond League 2015 (approx.12,000 in attendance). Even so, the large costs of bringing world-renowned football teams to play in a one-off friendly turns the event unprofitable for the organizers. For example, in the case of the Argentina vs Brazil friendly, the overall cost of the match was \$8.6 million

according to Conn (2015) and an estimate of the ticketing revenues total \$2.85 million<sup>3</sup>. In Qatar, the sporting venues are managed by government - mainly the Ministry of Culture and Sports (MOCS) - and rely heavily on government subsidies to cover operating costs. There are currently no private operators of sporting venues in Qatar which shows that the industry is at a nascent stage. None of the sporting venues in Qatar have sponsorship revenue from naming rights. Out of the 14 QSL teams, only one has a merchandising store - Al Sadd Club. All of the mentioned factors - including limited market demand, large costs of organizing sporting events, overreliance on government subsidies to organize events and support football clubs, limited ticketing and commercial revenues- all point towards the magnitude of the challenge in creating a sustainable industry in Qatar. Apart from the limited commerciality of sporting events, one of the underlying challenges effecting the wider events and tourism industry is the human capital challenge.

Development of relevant human capital in the GCC countries is a key enabler for the tourism and event sectors (Booz & Company 2013). Mohammed Bin Rashid Al Maktoum Foundation's report on Arab Human Capital Challenge found that 48% of the industry leaders from Entertainment & Media and Travel & Tourism were concerned about the education systems' ability to provide the economy with adequate skills. The region faces a number of challenges within the subset of human capital challenge which include the following: lack of policy framework, lack of TVET (Technical and Vocational

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<sup>3</sup> Average ticket price of 200 QR x 52,000 tickets = 10,400,000 QR based on 3.65 dollar/qr conversion rate

Education and Training) institutions focusing on tourism and events industry, development of appropriate programs to address sector-specific labor challenges, perception of the TVET among local citizens, retention rates and salaries in the industry. Moreover, these challenges have to be considered within the context of growing internal demand for skilled professionals which creates competition for the top talent in the region due to the increase in tourism offerings and number of events. The magnitude of the challenges can differ in each country. This section will mainly concentrate on Qatar with some comparative references from UAE.

Currently, there is no available data on Qatar's or the region's human capital gap in the event sector or more specifically the sporting event industry. Therefore, one must look at the wider tourism and hospitality sector's human capital challenges. A senior QTA representative has stated that the Qatar tourism sector will require an additional 127,000 hospitality professionals by 2030 based on the number of hotels in the pipeline and the tourism products on offer (Navdar 2014). This is a staggering number considering Qatar currently has around 20,000 hospitality professionals (Navdar 2014). In order to develop human capital in the sports and tourism sectors, countries must first have strategies and policy frameworks in place. Qatar's Education and Training Sector Strategy for 2011-2016 highlights the need to develop and manage a "National Qualifications Framework and occupational standards to align education and training with labor market needs" (Supreme Education Council n.d., p.17). UAE is a step ahead of Qatar in setting up its national qualifications authority which was established in 2010 with the aim to "build a UAE education and training system that includes vocational

education and training” to support the economy and the labour market. (UAE National Qualifications Authority n.d.).

Once the governments set training standards, identify the type of labor force requirements and promote growth of TVET then the private sector can respond in terms of offering the TVET capacity in the country with relevant programs to address the human capital challenge. The TVET market in Qatar is underdeveloped and there are limited upcoming TVET facilities especially in the sport and event related fields. QTA have announced a training institute focusing on various sectors including hospitality but no details on the status have yet been communicated. At present, there is only one institute in Qatar that specializes in training and development in sports and event industries which is the Josoor Institute, established in December 2013. More government, joint government and private sector and private sector TVET’s are needed to develop talents in the sports and event management industries. There is low participation of locals (e.g. Qataris, Emiratis...) within the GCC region in tourism and events-related employment due to low pay, longer working hours and better opportunities in government sector jobs. This limits the local talent development in addressing the human capital gap in the event sector and creates over-reliance on the expatriate workforce. And it is increasingly becoming more difficult to attract talent as there is high competition within the region to recruit tourism and event professionals. Moreover, as the region’s tourism and event offerings are similar to each other, demand comes for similar types of occupation, causing further strain on talent recruitment. A GulfTalent report which surveyed 22,000 professionals across a range of industries

states in Graph 3 that Qatar had one of the lowest retention rate of expats in 2014, ranking 5<sup>th</sup> out of six countries in the GCC region, with UAE topping the list (Walker 2015).



Graph 3: Retention of Expatriates by countries within the GCC  
Source: Walker (2015)

Interestingly, Qatar pays the highest salaries in the region at AED 29,207 per month (28% more than Dubai) with Dubai at AED 21,008 and Abu Dhabi at AED 20,990 (ESP International 2014) and still has a significantly lower expatriate retention rate than UAE. Higher pay could be attributed to the higher costs of living in Qatar. In Qatar’s case, the cost of human capital increases the overall costs of organizing sporting events in the country compared to other destinations in GCC. Difficulties highlighted as part of the human capital challenge in the industry all have to be addressed in order to create a sustainable industry and to become a true sporting destination of choice.

All of the three key challenges explored earlier are interrelated, meaning that addressing one of the challenges will positively influence the others. For example, efforts to establish Qatar as an event destination would help create a sustainable industry. And development of human capital will help the industry become more mature and support the destination creation. The next section will discuss the opportunities within the industry and recommended solutions to address key challenges.

## **2.5 Opportunities and recommendations**

Currently, Qatar and the other key players in the region like Abu Dhabi and Dubai are concentrating on creating destinations. That means they are required to spend more money upfront to establish the events market and, in the long-run, they are likely to enjoy the benefits of commercialization of sporting events as more players enter the market and events and destination become more established. There are a number of opportunities in the event sector that can be used to deal with the chosen challenges. Moreover, there are further opportunities to be captured if the following recommendations are taken into consideration.

Key Challenges	Opportunities	Recommendations
<p><b>1.Establishing a sporting event destination</b></p>	<ul style="list-style-type: none"> <li>• Qatar has already made significant amount of investment into key sporting and supporting infrastructure including new stadiums, indoor arenas, expressways, metro systems, expansion of airports, increase in hospitality offerings and more.</li> <li>• Existing government vision and sector specific strategic planning such as Tourism and Sports Strategies (see Table 4 for details)</li> <li>• Established portfolio of events as described earlier in section 2.2 (see Table 5 and Appendix 1 for details) It takes time and resources to building this type of portfolio of international events which could be a major deterrent for new countries trying to emerge as a sporting event destination in to the market.</li> <li>• Existing investment into world's largest sporting brands to promote the region as a destination including Qatar Airway's sponsoring of Barcelona and Arsenal's Emirates Stadium.</li> <li>• Strong efforts by the tourism boards to promote the region as a destination (e.g. QTA has oversees offices in Europe, GCC and Southeast Asia)</li> </ul>	<ul style="list-style-type: none"> <li>• In Qatar, it is recommended to encourage more coordination between key stakeholders including QTA, Aspire, MOYS, QOC, <u>Katara</u> and QNCC to develop, promote and host events. All the venues are controlled by the state of Qatar which means there could be a coordinated bid for events to ensure that market is not cannibalized due to venues competing against each other. The output of this coordination between key stakeholders should be a country wide calendar of events</li> <li>• Develop sport tourism strategy highlighting areas of specialization. Each country should further develop a unique selling point as a part of their sports tourism strategy. As discussed earlier, the region is competing for the same type of sporting events. Rather than bidding for all sporting events, countries should analyze areas of strengths and bid for events that correspond to core competencies. For example, countries should bid for events that would utilize the existing sporting venues rather than create a need to build more venues in an already oversupplied market (e.g. number of sporting venues are increasing in number despite low market demand)</li> </ul>

<p><b>2.Creation of an sustainable industry</b></p>	<ul style="list-style-type: none"> <li>• Successful efforts in creating a sporting event destination will drive demand and enhance commerciality of sporting events. (related to the challenge 1 opportunity)</li> <li>• In Qatar, QSL have already developed one of region's first football loyalty programme aimed at increasing attendance in local football club matches.</li> <li>• Also in Qatar, QSL have been delivering two community engagement initiatives namely, <u>Goalz</u> and QSL Experience. Both initiatives promote healthy lifestyles by delivering football activities to school children and develop relationships between communities and the QSL. Community engagement programs are key to generating interest about sports, creating a fan base and a sporting culture in the country in dire need of spectators to sustain the industry.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop sport tourism strategy and country wide calendar of events (also relates to challenge 1 recommendation)</li> <li>• Commercial viability of sporting venues requires a diverse calendar of events including sports, entertainment and leisure events. Countries should not over rely on one area but instead diversify to increase utilization of venues all year around.</li> <li>• Focus on improving events with proven success in the region which use the existing sporting infrastructure rather than requiring building of new sports facilities. Bidding strategy for new events should be based around the utilizing existing sporting infrastructure (e.g. Qatar has 3 state of the art indoor arenas built for the handball tournament, they can be used to host indoor tennis, volleyball, basketball events (also relates to challenge 1 recommendation)</li> <li>• MOYS should engage private sector operators to operate sporting venues in Qatar which will increase commerciality as professional operators are best suited to develop events, promote and manage sporting venues not government entities.</li> <li>• Qatar Football Association (QFA) and other sporting bodies could increase the number of community engagement initiatives in an effort to increase fan base and sporting culture in the country</li> </ul>
<p><b>3.Development of human capital</b></p>	<ul style="list-style-type: none"> <li>• Governments in the region have identified human capital gap to be a major challenge for the wider tourism industry</li> </ul>	<ul style="list-style-type: none"> <li>• Qatar should establish training standards for events and tourism industries and promote growth of TVET sector to fulfill the human capital needs of the industry</li> </ul>

	<ul style="list-style-type: none"> <li>• Qatar has already a successful government lead institute for developing talent in sports and event industries</li> <li>• UAE have established their national qualifications authority for education and training system including TVET</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a human capital strategy and implementation plan for the events industry which should include reliable estimates of the future demand and supply of event related occupations (e.g. facility management, marketing, operations/event coordinators, commercial/sales staff, security, cameraman, lighting, pitch maintenance, ticket clerks, volunteers)</li> <li>• Support private TVET institution specializing in tourism and events industries by government policies (e.g. policy levers such as making TVET training mandatory requirement for industry employees)</li> </ul>
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Table 7: Opportunities and recommendations for addressing challenges in sporting event industry in Qatar

Source: Author

### 3. Conclusion

Qatar is establishing itself as a regional player in the sporting event industry through an ambitious national vision, decade's worth of investment in promoting Qatar

as a destination, an established portfolio of annual international sporting events, and the construction of key infrastructure projects.

The report identified three major challenges that needed to be addressed for Qatar to become a truly regional and international sporting destination. Analysis of the current status of the sports event industry in Qatar revealed that the industry is underdeveloped and not commercially viable. The limited market demand for sporting events, large costs of organizing these events, overreliance on government subsidies to organize events, lack of private sector involvement and limited sources of revenues all point towards the magnitude of the challenge for creating a sustainable industry in Qatar. The report recommends a sports tourism strategy to be developed highlighting areas of specialization and bidding strategy for the country. Qatar should bid for events that would utilize the existing sporting venues instead of building new venues to host new events in an already oversupplied market. Moreover, in addition to the QOC's sporting calendar, further coordination between key government stakeholders to deliver a nationwide calendar of events will create greater synergies when hosting events, and ensure venues and events in Qatar are not competing against each other but complementing one another. Engagement of private sector operators is key to addressing some of the issues around commerciality of venues as professional operators are best-suited to develop events, and promote and manage sporting venues - not government entities.

Furthermore, the report identified the development of relevant human capital in the region as a key enabler for tourism and event sectors. Currently, Qatar faces severe human capital challenges including a lack of national quality standards for industry specific training and development, a limited number of TVET institutions focusing on the tourism and events industries, a lack of relevant programs to address sector-specific labor challenges, low local participation in the sector, low retention rates of expatriates and high costs of human capital. The report suggests a number of ways in which such challenges can be turned into opportunities including establishing training standards for the industry, developing a human capital strategy and promoting growth of private TVET institutions through policy levers such as making TVET training a mandatory requirement for industry employees to fulfill the human capital needs of the industry.

The future of Qatar's sporting event industry will largely depend on how efficiently and effectively the country plans to address the main challenges facing the events industry. As competition is ever increasing in the global world of the sporting events industry, Qatar cannot effort to lose its momentum and vision for becoming an international sporting event destination.

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## Teaching notes

This case study is intended to explore the key opportunities and challenges facing the sporting events industry in Qatar and the region. The report generated a longlist of industry-specific challenges and concentrates on three major challenges - namely, establishing Qatar as a major event destination in the region, creating a sustainable industry and developing human capital.

Below are some group exercises and discussion questions that encourage critical thinking, role playing with supportive reports, visual tools and graphs.

Teachers/facilitators can ask students to reflect upon challenges and opportunities facing the sporting events industry in Qatar and the region. This could be done as an individual assignment or as a group work including the entire class.

### Group exercises

Assume you are a policy advisor responsible for drafting the sport policy for the State of Qatar, how would you answer the following questions:

1. What are some of the opportunities that currently exist within the sporting industry in Qatar?
2. What are the challenges facing sporting events industry in Qatar and the region?  
List around 3-5 challenges, prioritize them in order of importance

3. What plans can the country develop to address these challenges and turn them into opportunities?
4. How does Qatar hosting the FIFA World Cup™ 2022 further develop its goal to become an international sporting event destination?

### Questions for discussion

1. **What are different types of sporting events and how can we classify these events?**

UK Sport (2004) classifies sporting events into various types such as Type A Mega events, Type B calendar events, Type C one-off events and Type D showcase events as described in Table 1 below (as cited in Bowdin et al., 2011).

<b>Type A</b>	Mega events: Irregular major international spectator events generating significant economic activity and media interest. Examples includes the Summer Olympics, the Paralympics Games and the FIFA World Cup.
<b>Type B</b>	Calendar events: Major spectator events generating significant economic activity, media interest and part of an annual domestic cycle such as FA Cup Final.
<b>Type C</b>	One-off events: Irregular one-off major spectator/competitor events generating an uncertain level of economic activity such as Grand Prix Athletics.
<b>Type D</b>	Showcase events: Major competitor events generating little economic activity and part of an annual cycle such as national championships in most sports.

Table 1

Source: UK Sports (as cited in Bowdin et al., 2011)

2. **What are some of the positive impacts of hosting mega events? What are potential undesirable impacts of hosting mega events? Give examples**

After analyzing the experience from over 30 host cities and nations, The Organization for Economic Co-operation and Development (OECD) has developed a framework that sets out the benefits of hosting international events. Table 2 shows the summary of the OECD’s findings which is categorized based on primary benefits and secondary benefits.

No	Primary Benefits	Secondary Benefits
1	Alignment of the event with sector and business growth strategies in the city or nation.	Post event usages of improved land and buildings.
2	Private-public investment partnerships.	Connectivity and infrastructure legacies.
3	Image and identity impacts attracting increased population, investment, or trade.	Labor market impacts and social/economic inclusion.
4	Structural expansion of visitor economy and supply chain development and expansion.	Secondary impacts in the property market.
5	Environmental impacts, both in built and natural environments.	Global positioning, events strategy going forwards, and project management capability.

Table 2  
Source: OECD (2010)

The impact of hosting a mega event can be described as a legacy which is generally viewed as being positive by the host population (VisitScotland 2012). As described in Table 3, Legacy includes a broader evaluation of the ‘hard’ or tangible legacies and softer, less tangible legacies in economic, human, social and environmental areas at a local, national, regional and global level. However, it is important to note that if a country misses out on capturing hard and soft legacy benefits then the event can leave a negative impact as seen in the case of the Athens 2004 Olympics, with many venues being underutilized and left in poor conditions.

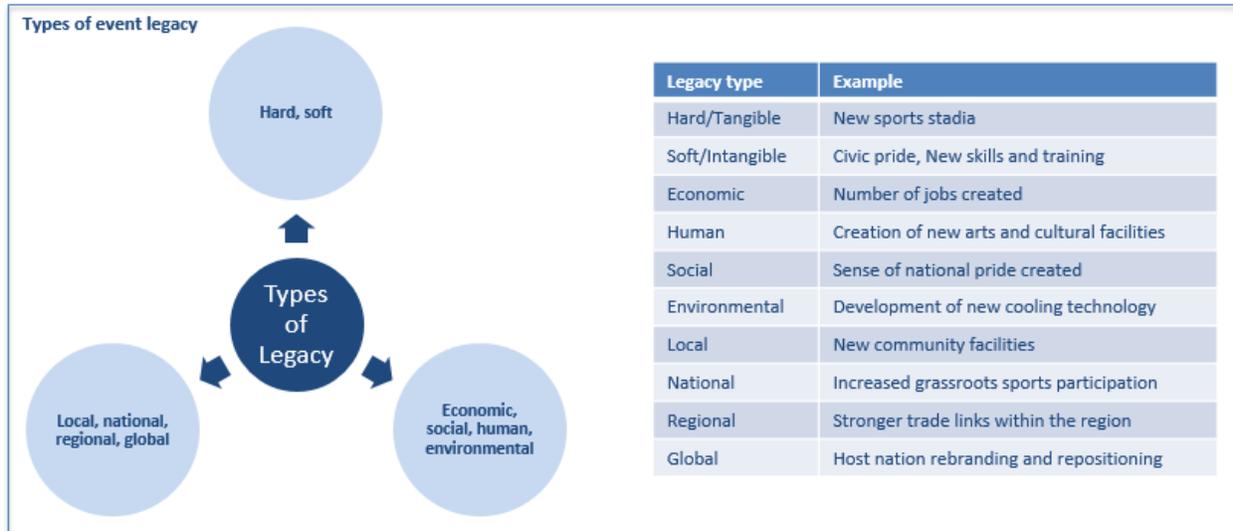


Table 3: Types of Event Legacy  
 Source: Adapted from MacRury (2009)

**3. How is Qatar preparing to host an amazing FIFA World Cup™ 2022 with plans for positive event legacy long beyond the tournament? What are some of human, social, economic, environmental legacies that Qatar has already started to deliver?**

“When Qatar bid to host the FIFA World Cup 2022™, it did so with a vision to use the tournament as a catalyst for sustainable, long-term change. From the start, we believed in the power of football and the FIFA World Cup™ to inspire innovation, to build bridges between cultures and peoples, and to accelerate positive social transformation. Our measure of success is the legacy this tournament leaves behind for Qatar, the region, and the world.” FIFA World Cup 2022™ Sustainability Strategy (2019).

Qatar’s legacy plans are guided by and developed in accordance with the Qatar National Vision 2030. Each of its four development pillars namely, human, social,

economic and environment are at the heart of all planning and delivery efforts. SC has already started delivering on its legacy commitments through programmes and initiatives like the Josoor Institute, Workers' Welfare, Challenge 22 and Generation Amazing.

For more information on SC's legacy programmes and initiatives please read Legacy Book (2016) <https://www.qatar2022.qa/sites/default/files/docs/SC-Legacy-Book-EN.pdf>

For more information on FIFA World Cup 2022™ Sustainability Strategy please read: [https://www.qatar2022.qa/sites/default/files/docs/FWC-2022\\_Sustainability-Strategy.pdf](https://www.qatar2022.qa/sites/default/files/docs/FWC-2022_Sustainability-Strategy.pdf)

## 6 Appendices

### 6.1 Appendix 1 - Annual sporting events held in Qatar

Annual Sporting Events Held in Qatar	Date	Location	Organizer	Content	Target Group/ Attendance Figures
Qatar Open Tennis Tournament (named Qatar ExxonMobil Open 2014 for its main sponsor)	Last week of December to first week of January	Khalifa International Tennis and Squash Complex	Qatar Tennis Federation	Started in January 1993, Qatar Open is one of the most popular tennis tournament in the Middle East and it is the ceremonial opening of the ATP World Tour season. It includes the best men tennis players. High profile opening games such as Nadal vs Federer games were played in number of key venues around Doha such as Souq Waqif (2009), Doha Bay (2011), Katara (2012)	Tennis fans and tourist from the region (35,000 tennis fans attended the 2014 tournament)
Qatar Total Open	Jan or Feb (6 day tournament)	Khalifa International Tennis and Squash Complex	Qatar Tennis Federation	Qatar Total Open is a WTA (Women Tennis Association) hard court tennis event held in Doha since 2008. 32 world class singles players and 16 double teams compete for the title and the \$731,000 prize money.	Sports and Tennis Fans, (News articles suggested low attendance in 2014)
IAAF Diamond League	9 May 2014 (held annually since 2010)	Qatar Sports Club Stadium (Suheim Bin Hamad Stadium)	IAAF (International Association of Athletics Federations)	IAAF Diamond League is an annual series of track and field competitions started in 2010. Qatar hosts one of the fourteen meetings held around the World (series include events in Europe, China and USA)	Sports/Athletics fans. In 2013, the 14-meeting series attracted an increased worldwide viewership with 270 million viewers across 130 countries. (Local attendance figures are unknown)
Qatar Masters Golf Tournament (named Commercial Bank Qatar Masters for its main sponsor)	Jan 21-24 2015 (annually held)	Doha Golf Club	Qatar Golf Association	Qatar Masters is an international golf tournament hosted by the Doha golf club since 1998. It is part of the three European tour golf tournaments which are staged in Middle East.	Golf fans from Qatar and abroad. There are over 20,000 visitors to the tournament each year.

UIM & H2O Racing Events	Schedule dates for 2015 4-6 March (Aqua Bike) 11 March (Nations Cup) 14 March (12 <sup>th</sup> Grand Prix of Qatar F1 Powerboat World Championship)	Doha Corniche	Qatar Marine Sports Federation (QMSF) hosts the UIM (Union Internationale Motonautique) events which are being promoted by H2O Racing	QMSF hosts powerboating and Aquabike races annually held in Doha Bay. Doha is an established circuit location for the UIM season calendar including the following races: 1. F1 Powerboat World Championship is a Formula 1 Powerboat racing. Qatar is looking to host its 12 <sup>th</sup> Grand Prix of Qatar in March 2015. 2. F1 H2O Nations Cup is powerboat racing aimed at National teams launched in 2011. Event has been hosted jointly in Doha and Abu Dhabi in 2013. Doha is currently one of the main destinations for the Nations Cup. 3. Aquabike is the last of the UIM event that is included in Doha's event calendar. QMSF have announced that it will host the brand new Qatar Cup, a four day powerboat racing festival in Doha Bay starting on February 4-7, 2015.	Powerboat racing and aqua sport fans from Qatar and abroad. Powerboat races have a strong following around the world. The Gulf region has strong and well established teams including Team Qatar and UAE which increases exposure of the sports to the regional fans.
FIVB Club World Championships	October	Aspire Dome	FIVB (Fédération Internationale de Volleyball)	Men's Volleyball Club World Championships have been held in Qatar from 2009 to 2012 consecutively. Doha hosted the Women's Volleyball club World Championships in 2010, 2011 and 2012.	Sports and Volleyball fans in Qatar and abroad (attendance figures are unknown)
IHF Handball Super Globe	7-12 September 2014 (annually held)	Al-Gharafa Sports Club	Qatar Handball Association	IHF Super Globe is an handball competition between champion clubs from continental confederations. It has been held in Doha since 2010. Qatar based Al Sadd Club were the runner-up in 2014.	Sport and Handball fans in Qatar and abroad (23,900 attendance – 1,195 per match) Qatar could see a rise in attendance levels considering national and club success in international tournaments.

FIM <a href="#">MotoGP World Championships</a>	March	Losail International Circuit	FIM ( <a href="#">Fédération Internationale de Motocyclisme</a> )	Qatar is the only country in the Middle East to host a round of the <a href="#">MotoGP World Championship</a> , the premier event for motorcycle racing. The whole season kicks off in Qatar in March.	Motor racing fans in Qatar and abroad (official attendance figures are unknown. Unofficial accounts have indicated that turn out at the <a href="#">MotoGP in Losail</a> was low in 2014.
FEI Equestrian Global Champions Tour	November	Al <a href="#">Shaqab</a> (Qatar Foundation's Equestrian Centre)	Al <a href="#">Shaqab</a>	Global Champions Tour is an annual show jumping series with 14 rounds of competition hosted in venues around the world. Doha Al <a href="#">Shaqab</a> has been a competitions venue since 2008.	Fans of Equestrian sports in Qatar and the region
Qatar Racing Club Annual Events	Jan-Feb 2015	Qatar Racing Club	Qatar Racing Club	QRC provides a calendar full of events including the following: 1. The Arabian Drag Racing League (ADRL) formed in 2008 is based in Qatar. It has grown significantly over the years into the regions most highlighted motoring sports event. The best and fastest car and bike racers in the region will compete over a two-month period for the title 'King of Arabia'. 2. Qatar National Street Drag Championships and Qatar National Drift Championships are a league based competition for tuned street cars and bikes hosted. 3. Qatar Mile is described as the biggest speed festival in the region allowing performance enthusiast to drive their cars and bikes on an airport runway. 4. <a href="#">Sealine Sand Drags</a> is a desert motorsports event which includes cars and buggies.	Motor racing fans from Qatar and the region. Currently, there are 117k likes on ADRL's <a href="#">facebook page</a> . (Attendance figures on event days are not disclosed)