

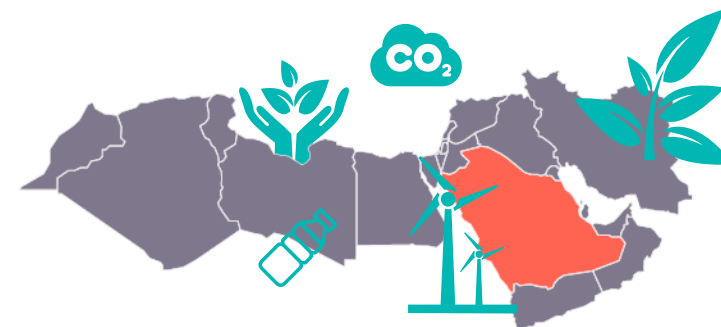
YouGov[®]Sport

Kingdom of Saudi Arabia

Sustainability and its impact
in sport, events and tourism in
the Kingdom of Saudi Arabia

KINGDOM OF SAUDI ARABIA

Executive Summary: Sustainability in the Kingdom of Saudi Arabia



Sustainability and what it means to people

- > The government has outlined a long term strategy to raise awareness and embed sustainability within consumer culture across a range of initiatives.
- > Older middle class consumers are more willing to adopt sustainability initiatives, while younger, working class people need more convincing.
- > Consumers feel that clean energy and recycling are the most important sustainability initiatives in their daily lives.

Sustainability in sports, events and tourism

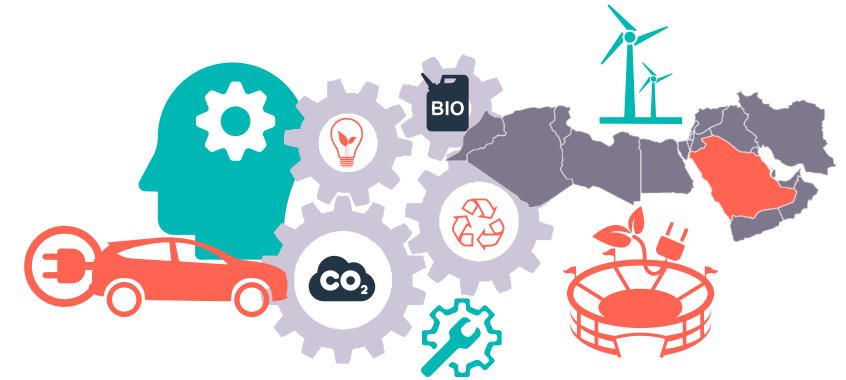
- > Sustainability features like digital ticketing and recycling facilities are well implemented at events, but sustainability as a whole is not a driving force behind consumers consideration when deciding to attend events.
- > Effective PR can help drive messaging and should be communicated across multiple channels as well as being present throughout the consumer experience at events.

Sustainability and the FIFA World Cup 2022

- > Much like in events overall, sustainability at the World Cup is a lower priority than other factors for consumers, but key initiatives like digital ticketing, designated smoking areas and recycling facilities are expected at the events.
- > PR around sustainability would have a positive impact on consumers with communications around ticketing, locally sourced food and water conservation likely to be the most influential.

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Executive Summary: What more can be done?



Sustainability in everyday life

- > Commercial Industry and Government should continue to raise awareness of new sustainability initiatives with a particular focus on areas that are most detrimental to climate change like carbon emissions and waste generation.
- > Currently sustainability is better adopted among older, affluent and better educated consumers, so future initiatives by the government and commercial industry should aim to appeal to younger consumers from lower education and income backgrounds.

Sustainability in sports

- > Sports venues and event holders should aim to communicate which sustainability features are available at events. This will then boost awareness of initiatives and make consumers more likely to expect in the future.
- > Events should exhibit a variety of clearly visible sustainability initiatives and facilities at every stage of a consumer's journey to drive awareness. This then has the potential to reach those less likely to adopt sustainability in their daily lives.

Sustainability and the FIFA World Cup 2022

- > Advertise initiatives around water conservation and locally sourced food as well as more common practices like digital ticketing, to help drive awareness and frame the visitor journey at the World Cup as an environmentally friendly experience.
- > Communications about designated smoking areas should be subtle in comparison to sustainability initiatives with wider environmental ramifications.

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Background & research methodology

1

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Key Areas of Exploration



Josoor Institute commissioned YouGov Sport to gauge consumers awareness and understanding of sustainability within the sports, events and tourism industry in the Middle East and North Africa.

This report will focus on these 3 key areas of exploration.



Sustainability and what it means to people



Sustainability in sports, events and tourism



Sustainability and the FIFA World Cup 2022

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Methodology

Research for this project was conducted in 3 phases:

QUANTITATIVE INTERVIEWS

- > Online surveys among general population using YouGov panel
- > Interview length 10 minutes
- > Achieved sample size: 1,004 respondents

IN DEPTH INTERVIEWS

- > Face to Face/Telephonic interviews sports and events industry executives
- > Interview length 15 minutes
- > Executives interviewed in Kingdom of Saudi Arabia – 10

DESK RESEARCH

- > Supporting data for the report will be provided by desk research
- > All sources for the desk research will be credible and verifiable

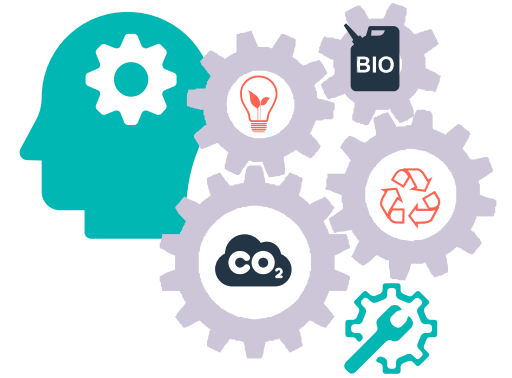
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Sustainability in everyday life and what it means to people



2

Section Summary



Saudi Arabia Vision 2030 has placed sustainability at the heart of the growth strategy with future projects incorporating sustainability into their planning stage itself.

Consumers understand 'sustainability' as being a 'long term' solution and actively incorporate initiatives in their daily lives.

Perceptions of sustainability are driven by older consumers with a higher education and income and also by those considering attending FIFA World Cup 2022.

Most consumers are aware of 'single use plastics' and their limits but don't currently consider their ban a priority for sustainability.

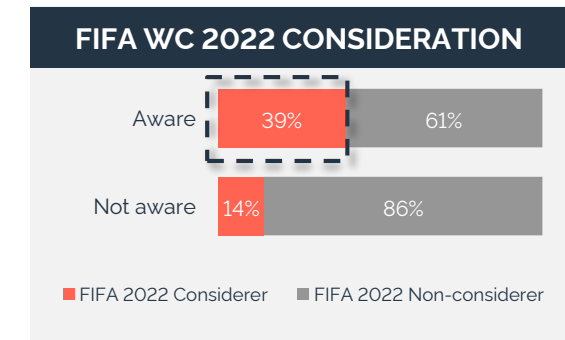
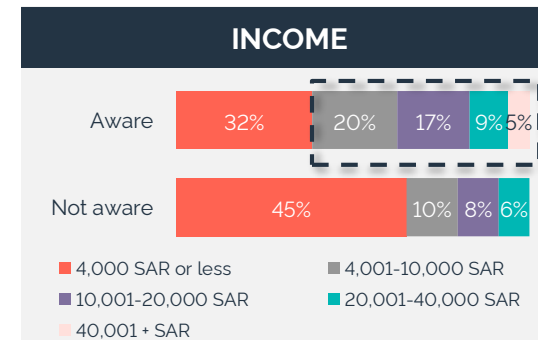
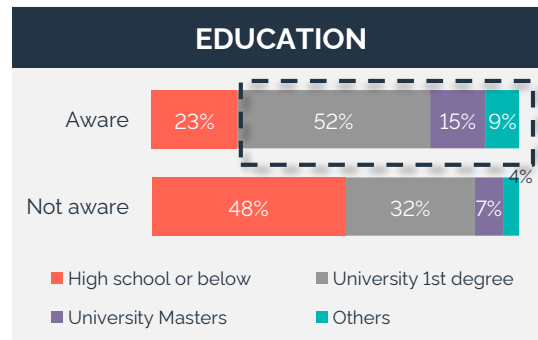
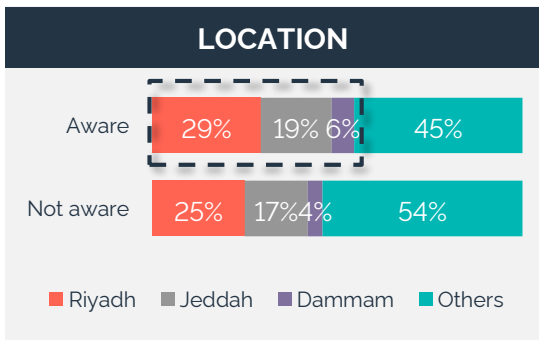
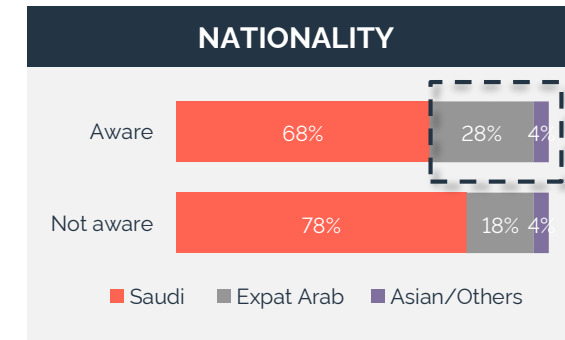
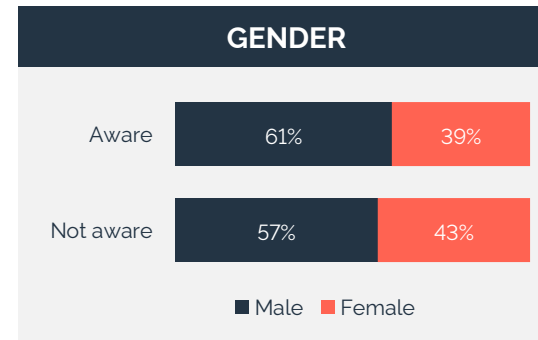
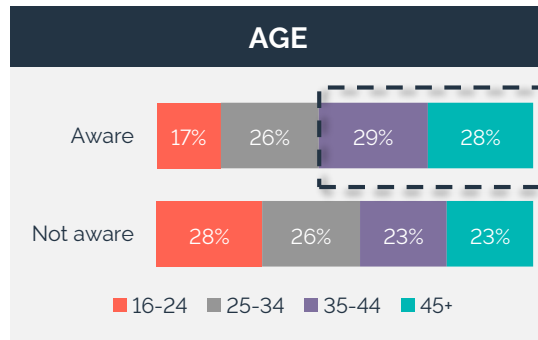
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Awareness of Sustainability Initiatives

Awareness of sustainability initiatives in general skews towards older, more educated, higher earning consumers – Non-Saudis and those considering FIFA World Cup 2022 are also more likely to be aware of sustainability initiatives. Those not aware of sustainability initiatives tend to belong to younger and lower income groups.



Demographic Profile



Source: YouGov Panel

Sample Size: , Aware - 845
Not aware - 159

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Environmental Challenges

There are a number of environmental challenges on the road to attaining economical sustainability in Saudi Arabia.



WASTE MANAGEMENT

Waste management is a big concern as only a small proportion of the country's refuse makes its way to recycling plants.



CARBON FOOTPRINTS

As a major producer of oil, carbon emissions from industrial complexes are among the highest in the world.



LIMITED WATER

Natural water is limited in Saudi Arabia, forcing industries to seek alternatives which can have an adverse affect on the environment and increase carbon footprints.



POLLUTION

Increased urbanisation of Saudi Arabia introduces a significant amount of pollutants into the environment and threatens economic sustainability.

Source: Desk Research & Government Portal. 2020

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GOVERNMENT LED INITIATIVES

– Vision 2030

Saudi Arabia has implemented 'Vision 2030', a long term sustainability plan with the aim of reducing harmful environmental effects and shifting consumer attitudes

Vision 2030 Highlights

- 1) **A vibrant society** – Aims to improve sustainability within culture, entertainment, sports, and improve life expectancy
- 2) **A thriving economy** – Increase employment, women in the workforce, international competitiveness, Public Investment Fund, foreign direct investment and non-oil exports
- 3) **An ambitious nation** – Promote non-oil revenues, government effectiveness, household savings and income, non-profit organizations

“The impact is supposed to be positive on the consumers, especially in the light of peoples' development and awareness on the environment. Now people are more educated on the environment.”

Events Industry

Source: Government Portal



RIYAHD METRO



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SUSTAINABILITY IN INDUSTRY

– Red Sea Project

The Red Sea Project is a new tourist destination being built in Saudi Arabia as part of Vision 2030 – it will offer visitors a chance to experience the very best of sustainable tourism in Saudi Arabia.

Sustainable Tourism Efforts

- > The number of visitors will be carefully managed to avoid over-tourism and hence protect the natural environment
- > A number of recycling initiatives are implemented throughout the project, like waste sorting bins and reverse vending machines (RVMs)
- > Eco tourism options for tourists will give them a chance to safely interact with the natural beauty of the region in a sustainable manner
- > Sustainable tourism will also benefit the local communities, boosting local economy

Source: Blooloo.com

THE RED SEA PROJECT

The Red Sea Project lies on the Western coast of Saudi Arabia, and covers 28,000 square kilometres, 200 km of coastline and an archipelago of 90 untouched islands.



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GOVERNMENT LED INITIATIVES

– Water

The National Program for Water Conservation (Qatrah) is an on-going campaign that aims to raise public awareness about the importance of water conservation and to change consumption behaviors.

Qatrah water conservation program

- > Reduce per day per capita consumption of water
- > Drive awareness of the benefits of water conservation with the hope to change consumers attitudes
- > Promote prudent water usage in daily lives
- > Highlight benefits for consumers like saving on water bills
- > Outline efficient water usage among the agriculture industry

> Saudi Arabia, despite being one of the driest countries in the world, is the world's third largest per capita consumer of water after the United States and Canada,

SAUDI ARABIA LAUNCHES PROGRAM FOR A DRASTIC REDUCTION IN WATER USE

Qatrah program was launched at the **March 17-19 Saudi Water Forum 2019** in Riyadh and with World Water Day set for Friday, March 22

Saudi Arabia is the world's **third largest** consumer of water per capita after the **US and Canada**

Through Qatrah, the ministry aims to reduce per capita consumption per day from

263L	to	200L	to	150L
		2020		2030

In 2016, **82%** of non-renewable water consumption was concentrated in the **agricultural sector**

“ The reality of the water sector in the Kingdom requires all of us to work together -- the public sector, the private sector and the citizenry -- with the aim of developing techniques for the production and distribution of water at the lowest possible cost, ”

Minister of Environment, Water and Agriculture Abdulrahman Al Fadley

Water security is a key challenge for Saudi Arabia, which has invested heavily in seawater desalination

Logos: Center for International Communication, Saudi Water Forum, Ministry of Environment, Water and Agriculture, Vision 2030, NWC, CICSaudi

Source: NWC.com; Waterworld.com

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SUSTAINABILITY IN THE COMMUNITY

– Recycling

King Abdul Aziz University in Jeddah has been holding an annual programme called 'Don't Throw it ... Recycle it' to collect used paper and cardboard as part of their community recycling initiative.

Don't Throw it ... Recycle it

- > More than 2,500 tons of used paper and cardboard collected in Mecca since 2013
- > In Mecca the drive would run for 10 days across 15 locations
- > The drive has been extended within the King Abdul Aziz University with the fund generated from the collection drive used to fund further research on recycling in the university
- > The programme has generated awareness of sustainability among thousands of people in both Mecca and Jeddah

Source: Zawya.com; Saudi Gazette

This has been running in Mecca since 2013 and extended to Jeddah from 2019 onwards

"There should be community awareness and training in order for sustainability to develop."

Events Industry



Dumping of wastes in deserts is a common sight in the Middle East

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Word Association

Unaided, consumers in Saudi Arabia strongly associate the word 'Sustainability' with phrases like 'long term' and 'eco friendly'.

SPONTANEOUS ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' – GENERAL POPULATION

Q: When you think of the word 'sustainable', what are the words/terms that come to your mind? Please mention as many responses as you can think.



'It should be for a long term, like a lifestyle. It should have the support of the media and organisations... There is another part that the government must be responsible of, which is the introduction and regulation of sustainability, and it even might be in school curriculums'.

Sports Industry

Source: YouGov Panel

Sample Size – 1,004

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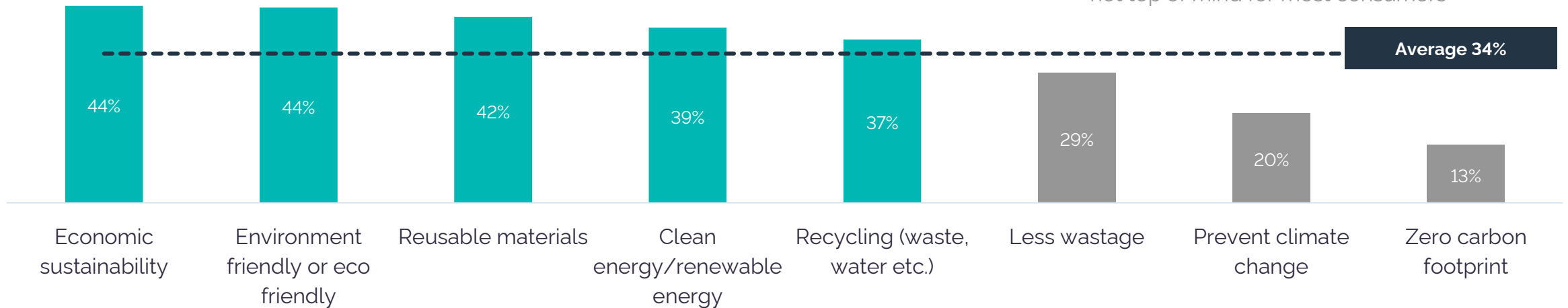
Prompted Association

Once prompted, consumers associate sustainability with 'economic sustainability' and being 'environmentally friendly' - 'reusable materials' is also closely linked with the term.

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' – SAUDI ARABIA GENERAL POPULATION

Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Environmental issues such as waste generation and Carbon footprints are major environmental challenges but are currently not top of mind for most consumers



Source: YouGov Panel

Sample Size – 1,004

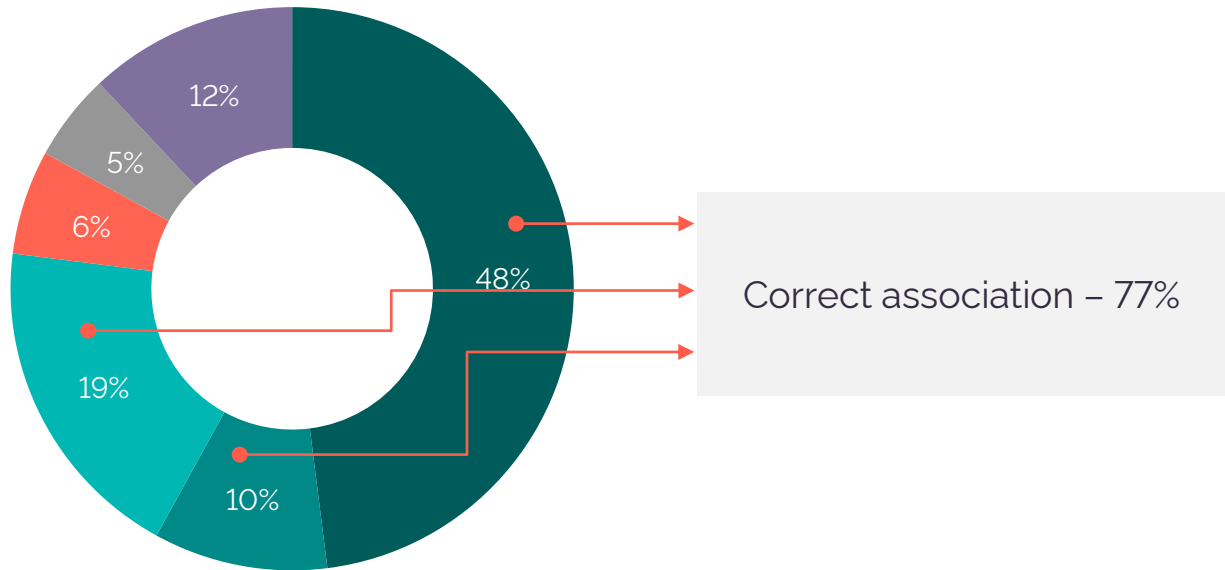
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Single Use Plastics

'Single use plastics' remain one of the biggest threats to environmental sustainability in Saudi Arabia, with close to 8 in 10 people aware of these plastics.

CORRECT ASSOCIATION WITH THE TERM 'SINGLE USE PLASTICS' – GENERAL POPULATION

Q: Which of these statements best describes what 'single use plastics' means?



- Plastic items discarded after using once
- Multi-use plastic items discarded after using once
- Both 1 and 2
- Thin or weak looking plastic items
- Plastics that you use many times
- Don't know

Source: YouGov Panel

Sample Size – 1,004

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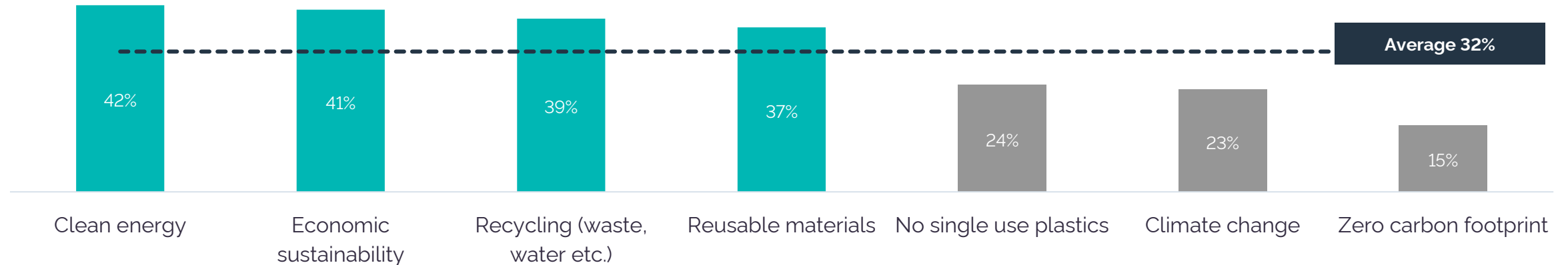
Sustainability Initiatives Important to People

Having clean energy is the most important aspect of sustainability for consumers, along with recycling and reusable materials.

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – GENERAL POPULATION

Q: Which of these sustainability initiatives are important to you in your day to day life.

The impact of climate change, single-use plastics and Carbon footprints are less of a consideration for consumers



Source: YouGov Panel

Sample Size - 1,004

Awareness vs Importance

Sustainability initiatives with the highest awareness are the most widely adopted. Initiatives which are more global and potentially less understood/relevant become a much lower priority.

AWARENESS VS IMPORTANCE OF SUSTAINABILITY IN EVERYDAY LIFE

Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Q: Which of these sustainability initiatives are important to you in your day to day life.



Source: YouGov Panel

Sample Size: 1,004

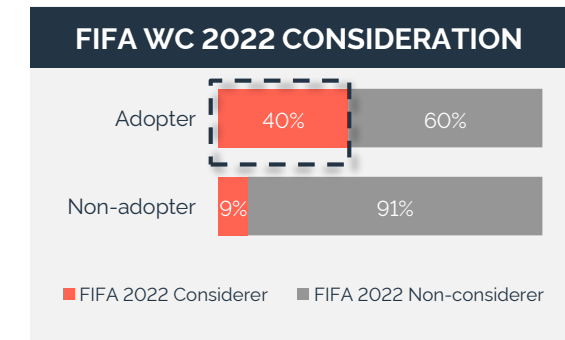
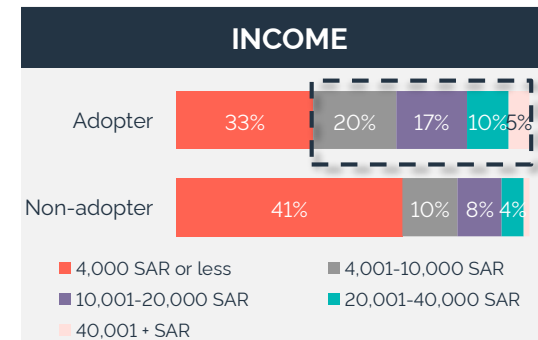
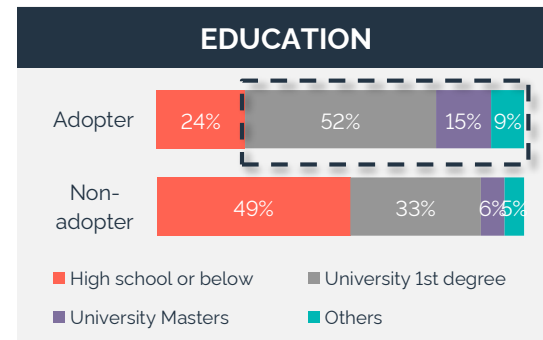
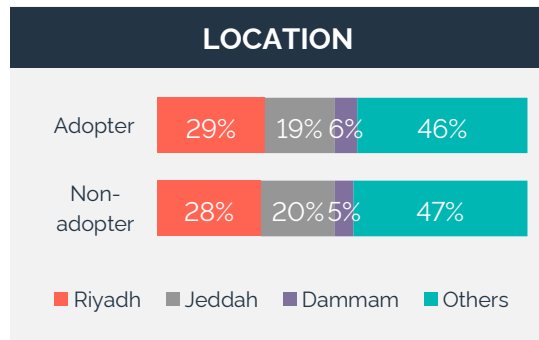
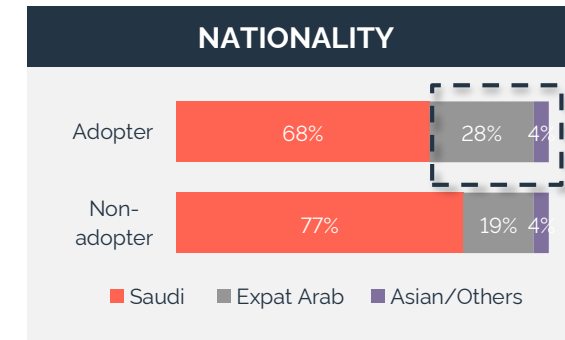
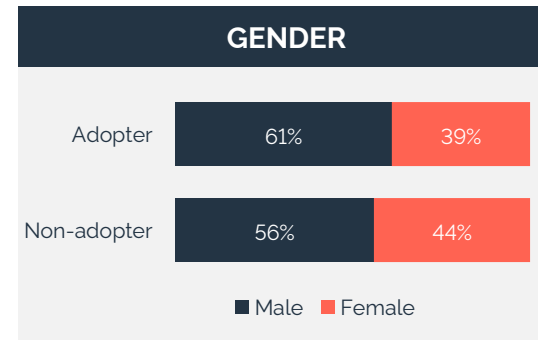
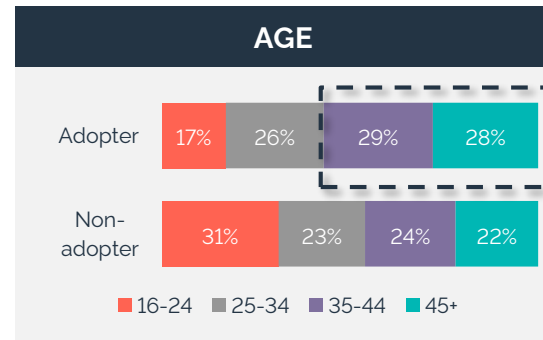
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Adopters of Sustainability Initiatives

Those aware of sustainability initiatives are the most likely to adopt and tend to be older (35+), have higher education and income, whereas non-adopters are typically younger (<35), are less educated and have lower income.



Demographic Profile



Source: YouGov Panel

Sample Size: Adopters - 858
Non-adopters - 146

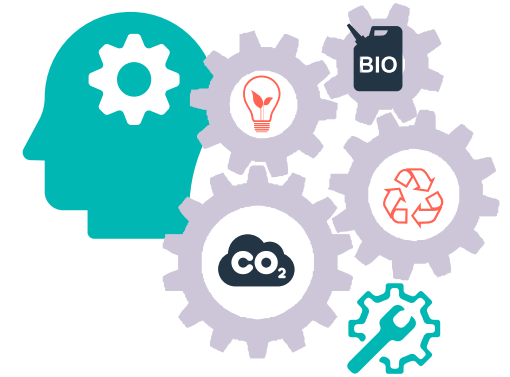
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Sustainability in sports, events and tourism



3

Section Summary



Sustainability is not the highest on the list of factors that influence decision to attend events. Factors like price, timings, travel, suitability for family precede sustainability.

Sports fans who consider attending major events tend to be among the middle class, which potentially makes them more likely to be adopters of sustainability initiatives.

Awareness of digital ticketing and designated smoking spaces is well established in Saudi Arabia and consumers expect these initiatives the most at events.

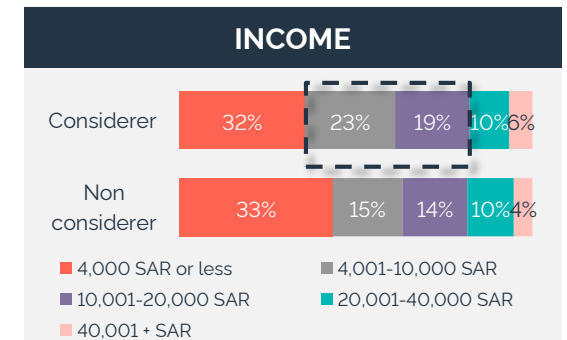
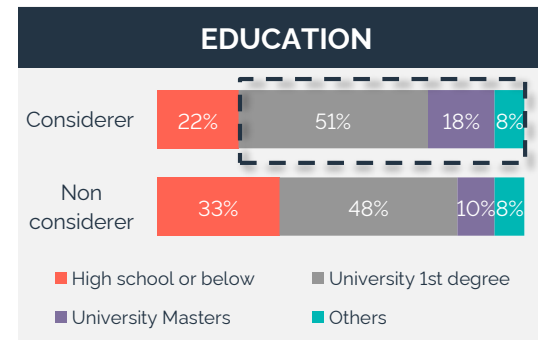
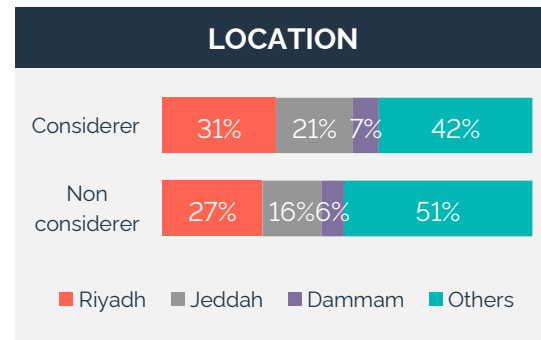
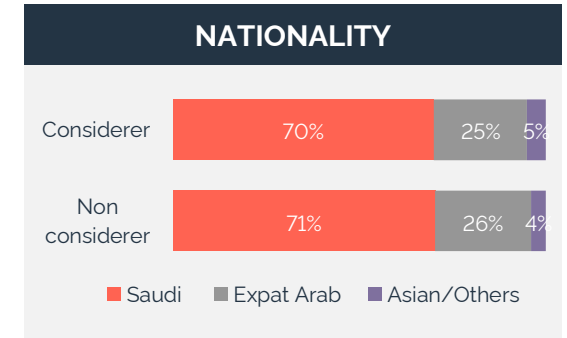
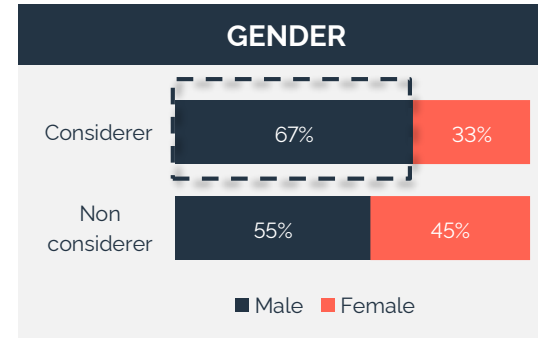
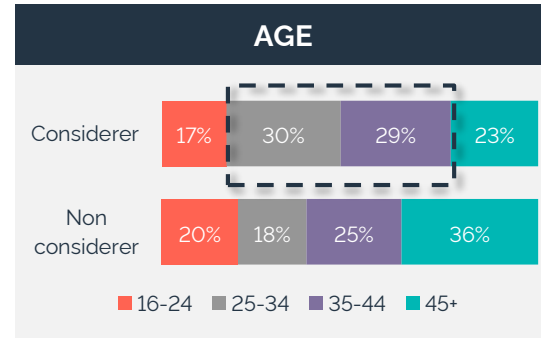
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Considerers of Sports Events

Considerers tends to be males aged 25-44 from Riyadh, Jeddah and have higher education and income, while older (45+) are less likely to consider attending large events.



Demographic Profile



Source: YouGov Panel

Sample Size: Aware - 523
Not aware - 328

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Sustainability in sports and events have become a top priority for officials and industries as identified by UN Policies.



The UN has agreed that **sport facilities, events and activities** have a negative impact on the environment through:



Noise and light pollution



Consumption of non-renewable resources



Consumption of natural resources



Emission of greenhouse gases



Soil and water pollution from pesticide use



Soil erosion



Waste generation

Source: Event Sustainability case study by James Stibbs

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To address the sustainability challenge, the UN '*Sports for Climate Action Framework*' was initiated as part of the Paris Climate Change.



The Framework is a movement for the sports sector aimed at ensuring that its members play their part in carbon reduction and prioritises five principles:

Undertake systematic efforts to promote greater environmental responsibility

Reduce overall climate impact

Educate for climate action

Promote sustainable and responsible consumption

Advocate for climate action through communication.

The framework also asks **sport to use its platform to communicate** the need for positive change in others

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CASE STUDY · SUSTAINABILITY IN SPORTS, EVENTS & TOURISM

– Formula E

As a result of the increased need for environmentally friendly practices within Sports and Tourism, some events have embodied sustainable solutions at their core.

Formula E Diriyah E-Prix, Consumer facing sustainability features

Formula E, the electric car motorsport championships has sustainability in it's DNA and Riyadh has hosted a round at the Diriyah E-prix since 2018

- > Single-use plastic water bottles have been phased out at all Formula E events and replaced with 100% reusable and recyclable water pouches.
- > Recycling stations are setup across the venue to collect other plastic bottles.
- > E-ticketing + E-visa scheme to attend the race reduces use of paper.
- > Free public bus service with multiple pick-up points around the city,
- > The event also serves to improve awareness levels of sustainability initiatives among visitors.



Formula E Championship is the only racing series to receive the ISO 20121 certification

Source: FormulaE.com

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CASE STUDY · SUSTAINABILITY IN SPORTS, EVENTS & TOURISM

– Green Riyadh

Promoting the natural environment and increasing green living spaces in urban areas is a major driving force for change that benefits everyone.

Green Riyadh Project and its sustainability aims

The Green Riyadh project aims to improve the environmental sustainability standing of the city by increasing the per capita share of green space, and raising total green spaces.

- Improve overall air quality of the city
- Promote healthy lifestyle among residents of Riyadh by improving green spaces
- The project also aims to improve awareness of sustainability initiatives in everyday lives
- Green spaces also lead to better tourism opportunities and subsequently helps with economic sustainability



This project is a key element of the country's Vision 2030 and aims to make Riyadh one of the top 100 cities of the world

Source: riyadhgreen.sa

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CASE STUDY · SUSTAINABILITY IN SPORTS, EVENTS & TOURISM

– NEOM

However, in order to raise awareness of sustainability, the key is to deliver clear messaging with a PR driven communications plan across multiple channels.

NEOM

NEOM, the planned cross-border city, is a centre piece of the Vision 2030 plan and utilises 'smart city' technologies during development.

- > The PR team at NEOM have used an integrated communication plan to drive PR regarding their sustainability strategy with both local international press coverage along with regular posts with both videos and images on website and official social media handles, highlighting the importance of promoting sustainability across a myriad of platforms.



Source: Neom.com; BBC.com

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Example: Consumer Journey

Ultimately, the goal for sustainability at events and attractions is to implement initiatives at every stage of the consumers journey, thereby maximising exposure and raising awareness.

	1	2	3	4	5	6	7
STAGE	Awareness / PR of Events	Buy tickets	Commute to and from	Entrance and movement around the venue	Food & Beverages	Waste Disposal	Toilets & Recreation
SUSTAINABILITY INITIATIVES	<ul style="list-style-type: none"> > Digital source > Recyclable newspapers > No pamphlets > Solar powered billboards 	<ul style="list-style-type: none"> • Digital payments • Digital tickets 	<ul style="list-style-type: none"> • Public buses • Metro • Carpooling 	<ul style="list-style-type: none"> • Electronic ticket scanning machines • Electric powered transportation within venues (e.g.. Golf buggies) • Disabled friendly access 	<ul style="list-style-type: none"> • Locally sourced food • More vegetarian/vegan options • No single use plastic cutlery • Paper bags instead of plastic ones • Reusable bottles • Cutlery made of recyclable materials 	<ul style="list-style-type: none"> • Recycling stations • Reverse Vending Machines (RVMs) • Waste segregation bins 	<ul style="list-style-type: none"> • Water saving sanitary-ware in toilets • Air hand dryer in toilet instead of paper • Motion sensor taps and lights • Designated outdoor smoking areas

Source: Desk Research

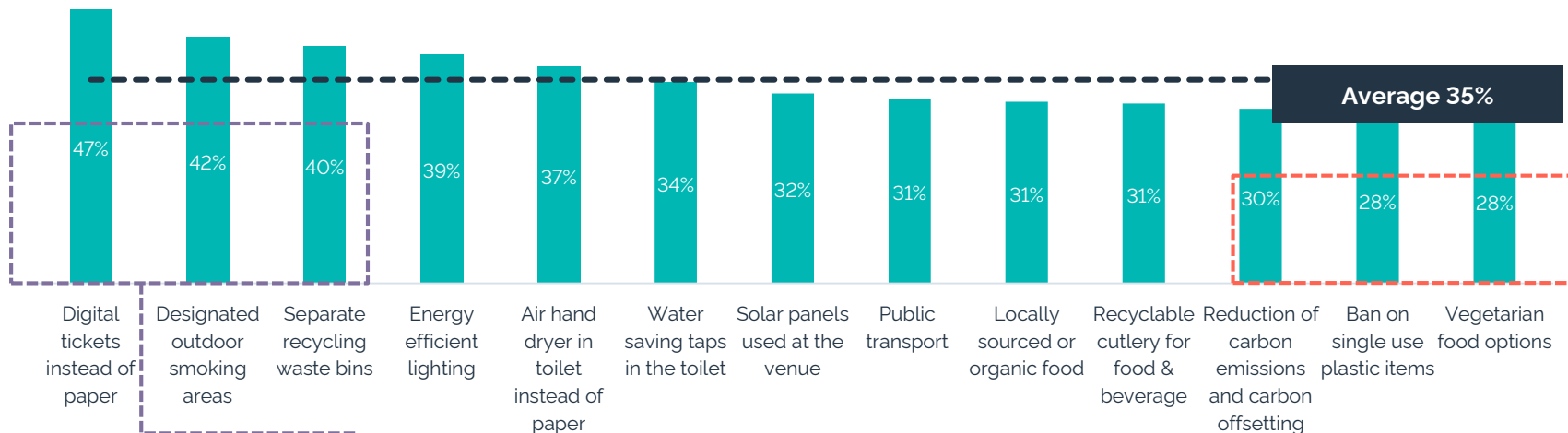
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Awareness of Sustainability

Digital ticketing facilities are by far the most well known sustainability initiative at events in Saudi Arabia, followed by designated outdoor smoking areas and recycling bins.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – GENERAL POPULATION

Q: Which of these environmental sustainability measures at an event/venue are you aware of either through attending events or through media sources?



"We should raise awareness among audience about all the new things happening, and we should cooperate with them regarding the new techniques."

Sports Industry

As Saudi Arabia continues to develop its infrastructure ahead of the World Cup 2020, features like digital ticketing, recycling bins and outdoor smoking areas are much more common.

Awareness of key initiatives like carbon reducing emissions and the banning single use plastics are below par.

Source: YouGov Panel

Sample Size: 1,004

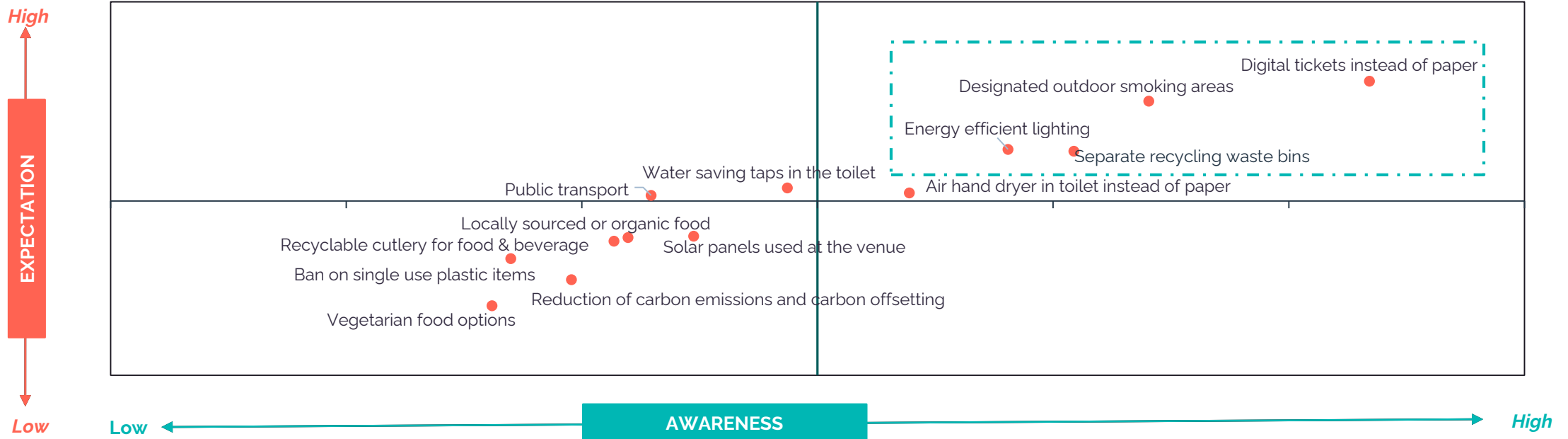
Awareness vs Expectations

Digital tickets, designated outdoor smoking zones, energy efficient lighting and waste sorting bins are the most expected sustainability initiatives at events.

SUSTAINABILITY INITIATIVES AT EVENTS – AWARENESS VS EXPECTATIONS

Q: Which of these environmental sustainability measures at an event/venue are you aware of either through attending events or through media sources?

Q: Which of these environmental sustainability measures would you expect at venues for large events?



Source: YouGov Panel

Sample Size – 1,004

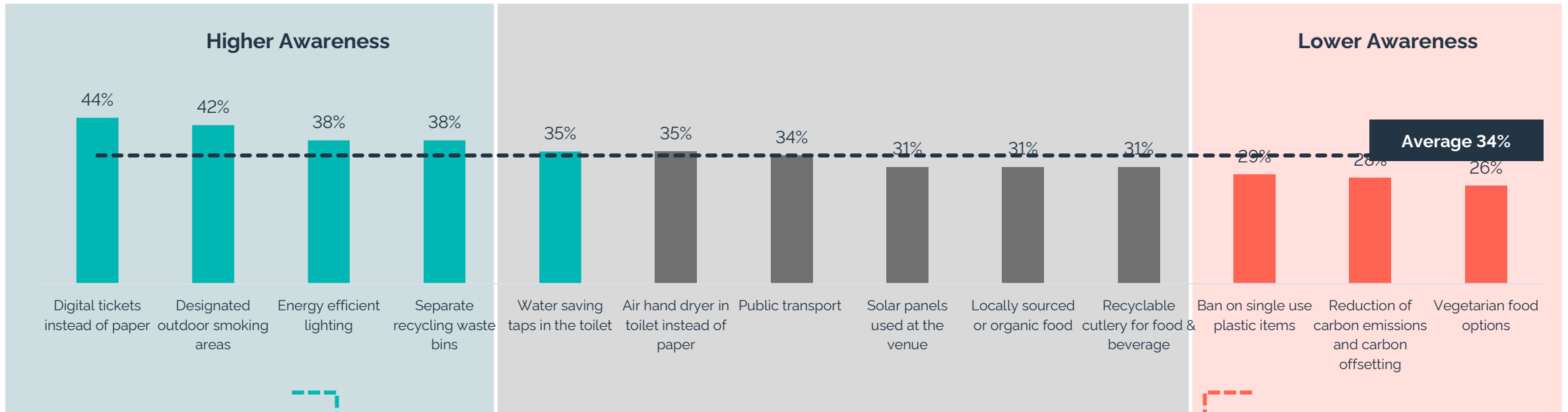
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Sustainability Measures Expected at Events

Digital ticketing and smoking areas are the most impactful sustainability features, as they are already common at events, while less understood initiatives have less impact.

SUSTAINABILITY MEASURES EXPECTED AT EVENTS – GENERAL POPULATION

Q: Which of these environmental sustainability measures would you expect at venues for large events?



The sustainability initiatives consumers are most and least aware of, are also the most/least expected at events respectively

Source: YouGov Panel

Sample Size: 1,004

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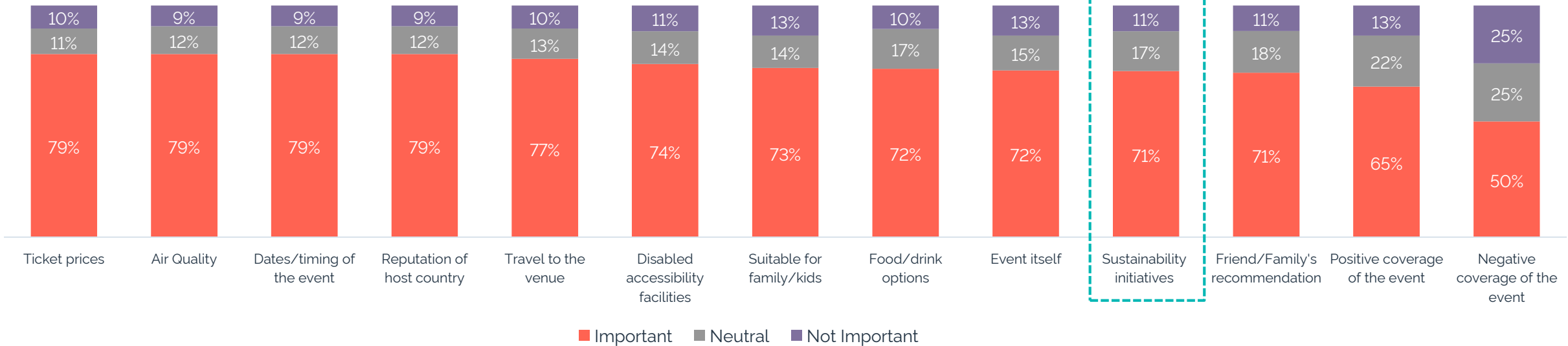
Factors Important While Deciding to Attend Events

Sustainability initiatives in general are still not a major consideration among consumers when deciding to attend an event.

FACTORS IMPORTANT WHILE DECIDING TO ATTEND EVENTS – GENERAL POPULATION

Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Although an important feature for most wanting to attend an event, sustainability is a much lower priority than other aspects.



Source: YouGov Panel

Sample Size: 1,004

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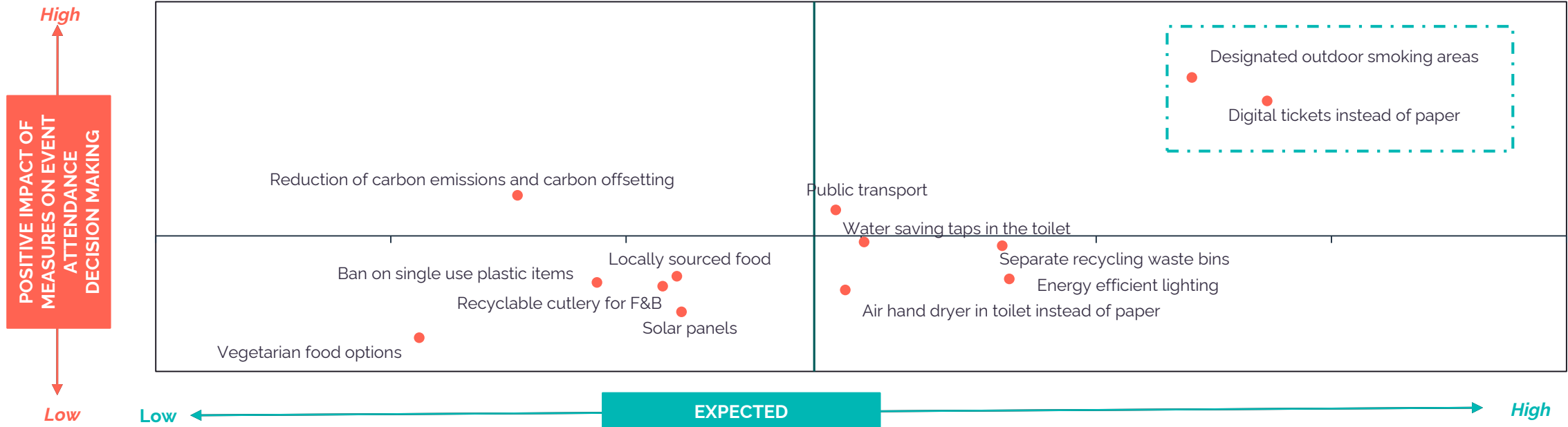
Impact Decision Making

Due to their familiarity, digital ticketing and designated smoking areas are the most important sustainability features for consumers and also make the most positive impact on their decision to attend an event.

SUSTAINABILITY MEASURES AT EVENTS – IMPACT ON DECISION MAKING

Q: Which of these environmental sustainability measures would you expect at venues for large events?

Q: When you consider attending large events at a stadium/arena, which of these sustainability measures would impact your decision to attend?



Source: YouGov Panel

Sample Size – 1,004

KINGDOM OF SAUDI ARABIA

Easily Implemented Sustainability Initiatives

Industry professionals believe that most sustainability initiatives can be implemented with relative ease, especially conceptually simple solutions.

"Almost all ...can be implemented but it depends on the budgets and the awareness of the receiver and the initiatives.

The change of plastic material is easy, recycling wastes is easy, using biodegradable utensils is easy, transforming energy into solar or wind power is also easy and can be handled."

Tourism Government



DIGITAL TICKETS & PAYMENTS

Not only saves paper but also convenient as it avoids standing in queues.



SINGLE USE PLASTIC

Banning of these plastics can be replaced by reusable/recyclable materials.



USAGE OF RECYLCING BINS

Clearly marked facilities would make it easy for attendees to throw waste into appropriate bins.

Source: YouGov Sport Interviews with Sports/Events/Tourism Executives in the Kingdom of Saudi Arabia

KINGDOM OF SAUDI ARABIA

Not Easily Implemented Sustainability Initiatives

Nonetheless, awareness is the main driving factor for change and long formed habits pose the greatest challenge regarding consumers adoption of initiatives.

“For sure (it will make a positive impact on the audience),... let us say around 15% of the audience is well aware of it.

When the audience is going to a certain event, their main target is the event itself, the details of the event are not as important... However, he will realise that he is going to a place where there is healthy food, or sustainable energy, but it will not matter... it will matter when the price of the ticket differs’

Tourism Ministry



CULTURE

The challenge for Saudi Arabia is not consumer adoption but establishing a ‘sustainability’ culture in the country.



AWARENESS

Spreading awareness of sustainability is the main challenge in Saudi Arabia as it requires a significant amount of investment and organisation from government and industry alike.

Source: YouGov Sport Interviews with Sports/Events/Tourism Executives in the Kingdom of Saudi Arabia

KINGDOM OF SAUDI ARABIA

Sustainability and the FIFA World Cup 2022



4

Section Summary



Those wanting to attend the FIFA World Cup in 2022 tend to be higher earning and better educated consumers, and are therefore very likely to also be adopters of sustainability initiatives in general.

PR around sustainability at the FIFA World Cup 2022 would positively impact perceptions about Qatar and potentially help change perceptions of Saudi residents currently not considering attending.

Designated waste sorting bins and digital tickets are the most expected sustainability initiatives among considerers of FIFA World Cup 2022.

Digital tickets, locally sourced food and water conservation are the factors that will have the most positive impact on people's consideration of FIFA World Cup 2022.

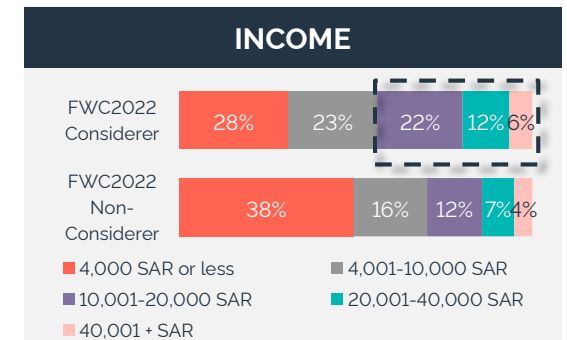
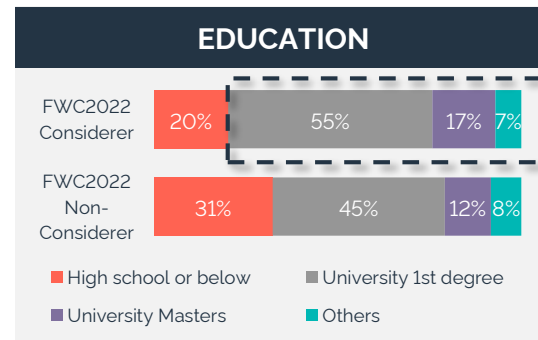
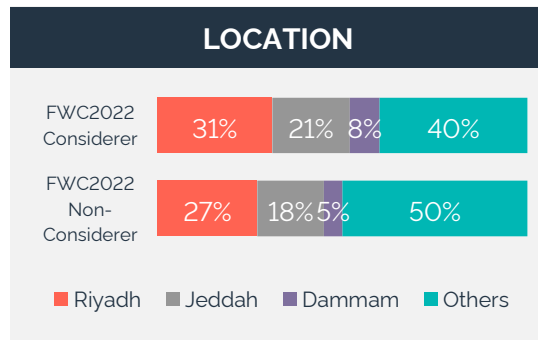
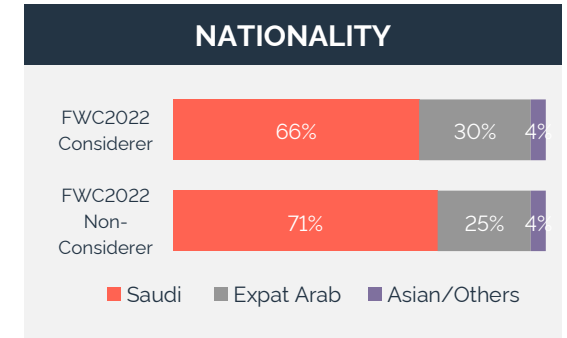
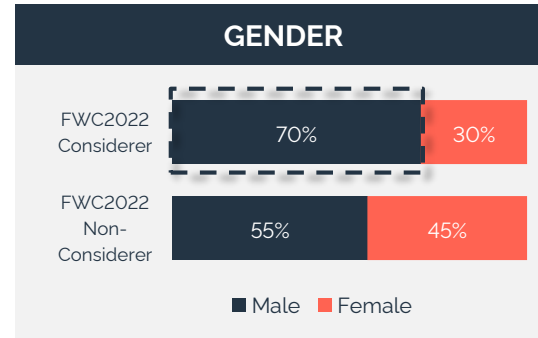
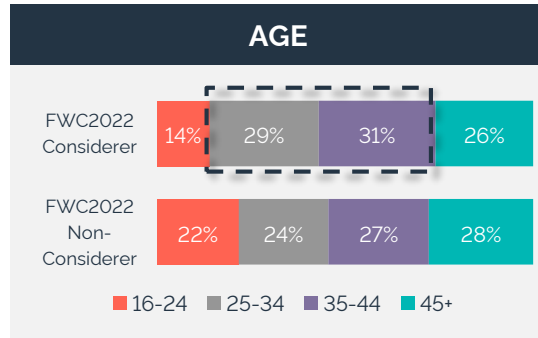
KINGDOM OF SAUDI ARABIA

FIFA World Cup 2022 Considerers

Considerers of the FIFA World Cup in 2022 are more likely to be older (25+), better educated and higher earning consumers, whereas those who are not considering attending, tend to be younger (<25), have lower income and education.



Demographic Profile



Source: YouGov Panel

Sample Size: Considerer- 352
Non-Considerer - 652

KINGDOM OF SAUDI ARABIA

FIFA World Cup 2022 Sustainability Strategy

FIFA World Cup 2022 sustainability strategy is a joint effort between FIFA and the local organising committee in Qatar and is in line with UN's Sustainable Development goals - a collection of 17 goals designed to "achieve a better and more sustainable future for all" and intended to be achieved by 2030



Source: FIFA World Cup 2022 Sustainability Strategy

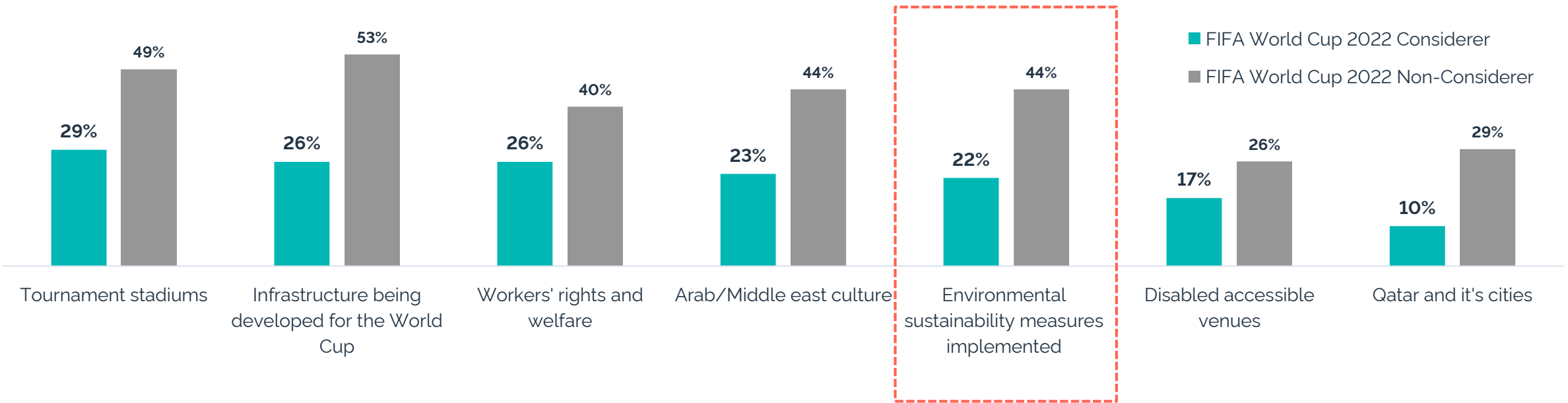
KINGDOM OF SAUDI ARABIA

Awareness of Aspects About FIFA World Cup 2022

Despite being a key aspect of the FIFA World Cup in 2022, environmental sustainability initiatives are not as well known as infrastructure, stadiums and workers rights and welfare.

FIFA WORLD CUP 2022 QATAR ASPECTS PEOPLE ARE AWARE OF

Q: Qatar is hosting the FIFA World Cup in 2022. Which of the following factors regarding the Qatar FIFA World Cup have you heard of in the news?



Source: YouGov Panel

Sample Size: Considerer – 352
Non-Considerer – 652

KINGDOM OF SAUDI ARABIA

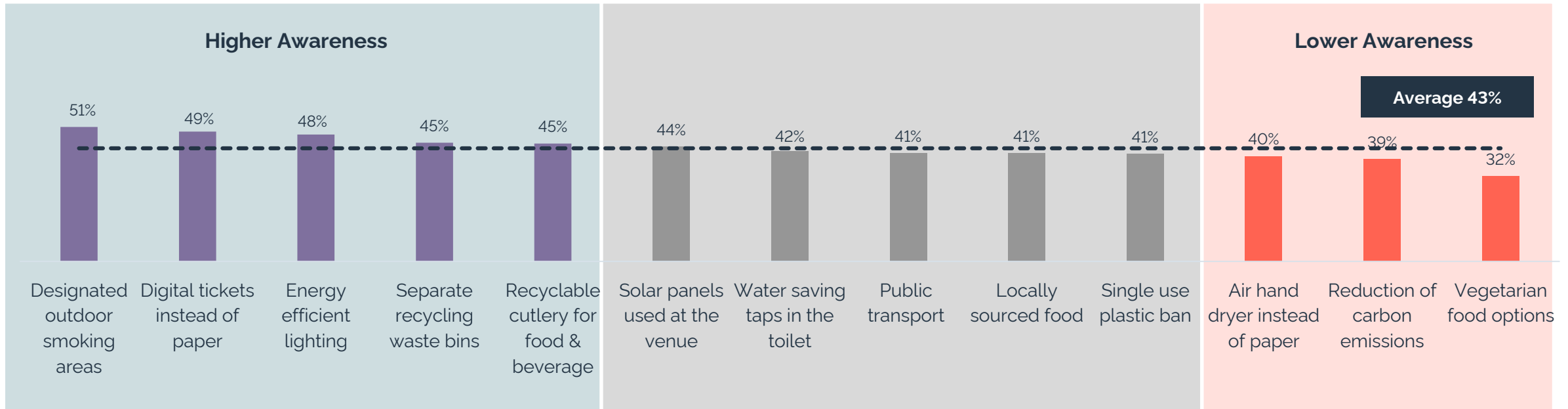
Sustainability Initiatives Expected at FIFA World Cup 2022

Designated outdoor smoking areas are the most expected sustainability initiatives among those who consider attending the FIFA World Cup, slightly ahead of digital ticketing.

EXPECTED SUSTAINABILITY INITIATIVES AT FIFA WORLD CUP 2022 (AMONG CONSIDERERS)

Q: Which of these environmental sustainability initiatives would you expect at venues for large events?

Expected sustainability initiatives are in line with general awareness suggesting that more work is needed to bolster perceptions of initiatives with lower awareness.



Source: YouGov Panel

Sample Size: General Population – 1,004, FIFA World Cup 2022 – 352

KINGDOM OF SAUDI ARABIA

Impact of PR Around Sustainability on Event Perception

Focused PR campaigns around sustainability initiatives would positively impact event perception for the majority of the population, around 8 in 10 people

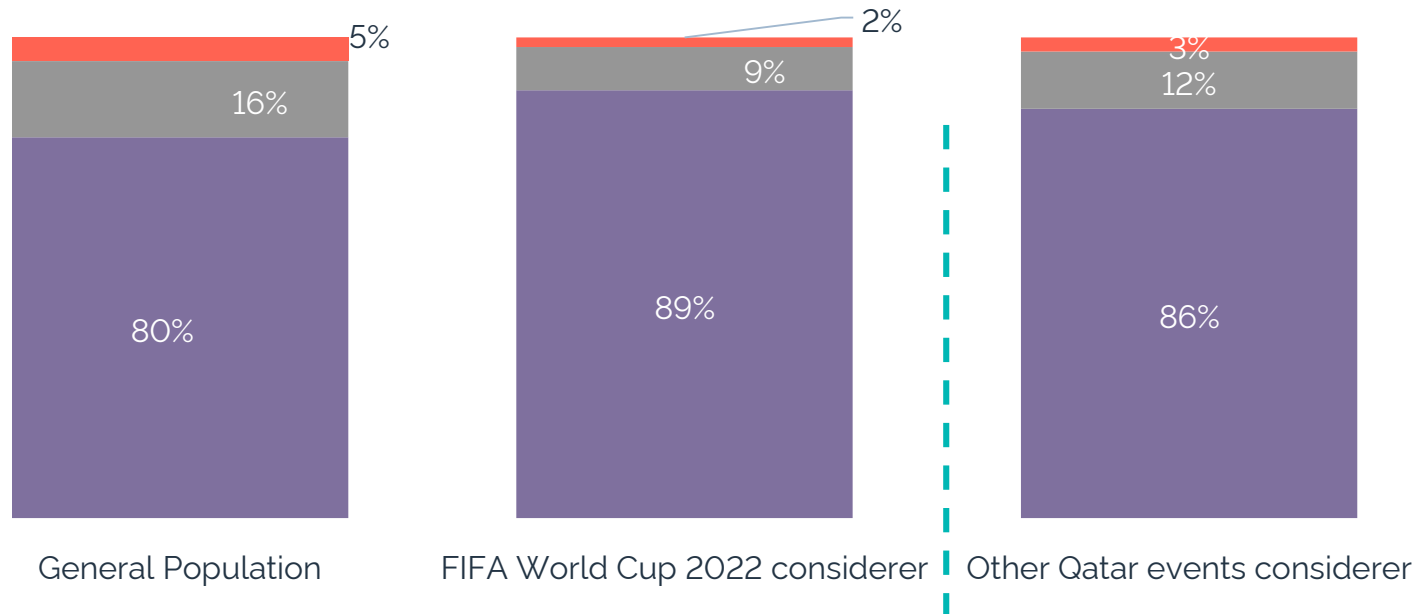
Q: If you knew that a large event was implementing several sustainability measures for its venues like public transport, recyclable materials, ban on single use plastics etc., how would this change your impression of that event?

This impact is significantly higher among those who consider attending FIFA World Cup 2022 and other sports events in Qatar

- Impression would become negative
- No change in impression
- Impression would become positive

"Of course it will have a positive impact on the audience and we see (this) with our audience in Al Wahda."

Sports Industry



Source: YouGov Panel

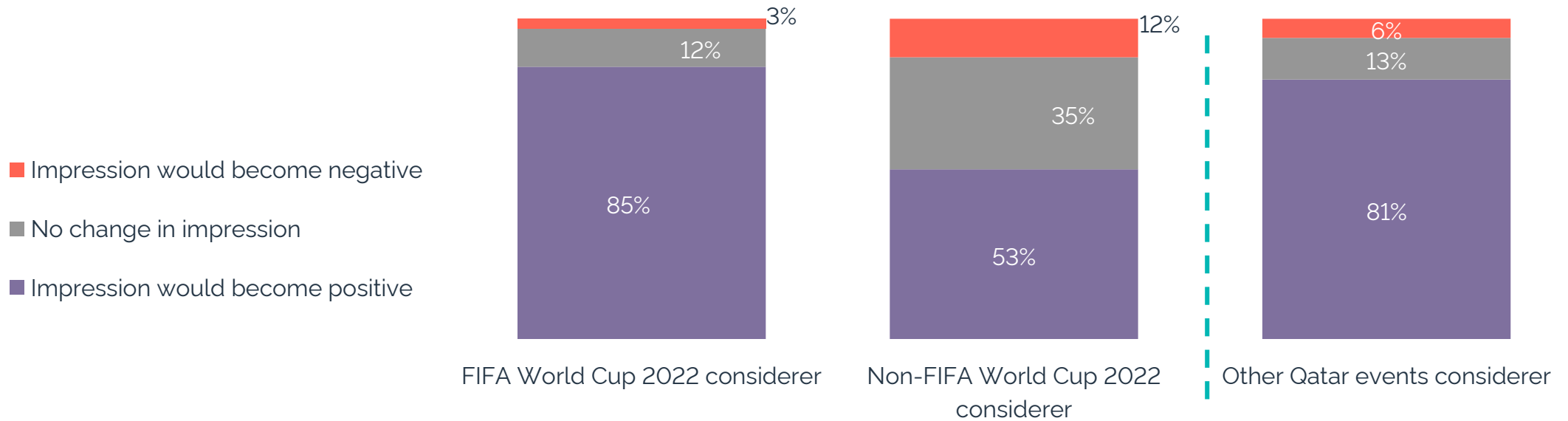
Sample Size: General population – 1,004
 FIFA World Cup 2022 Considerer – 352
 Other Qatar events – 345

KINGDOM OF SAUDI ARABIA

Change in Perception Due to PR on Sustainability Initiatives

Messaging about sustainability initiatives at the 2022 World Cup is likely to leave a stronger positive impression about Qatar on consumers planning on attending vs those who are not.

Q: : If you knew that Qatar was implementing several sustainability measures at the host cities and stadiums like public transport, recyclable materials, solar panels etc for the FIFA World Cup 2022, how would this change your perception towards Qatar as a country?



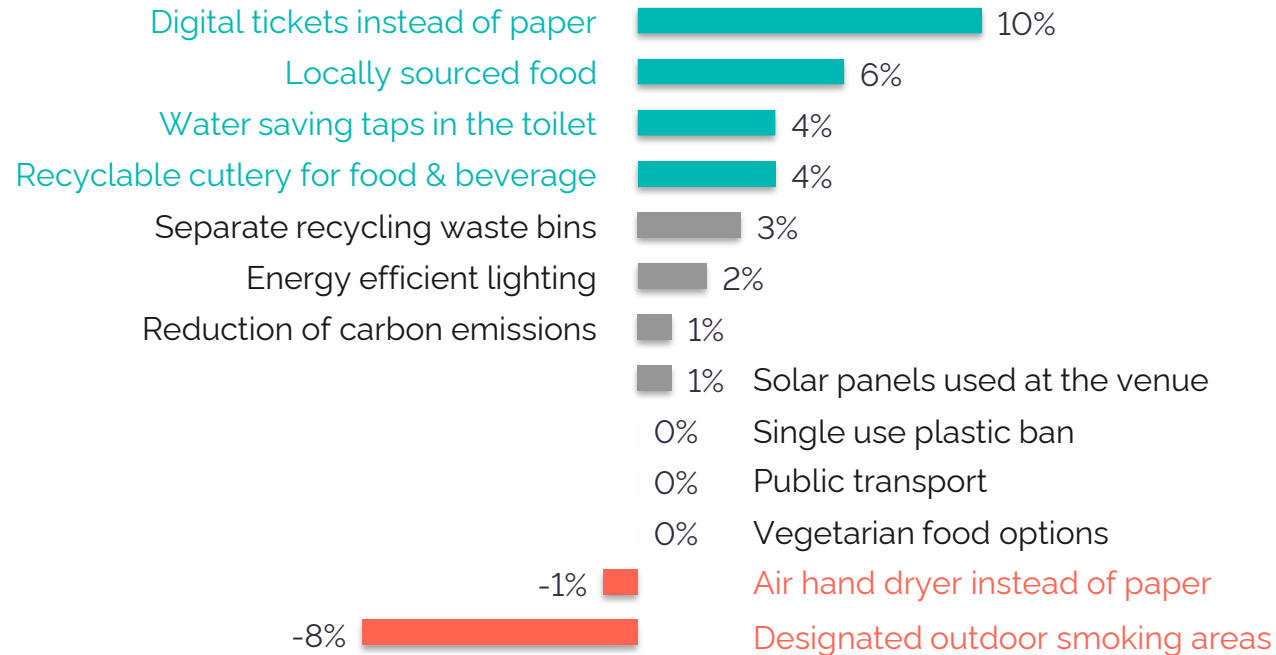
Sample Size: Considerer – 352
 Non-Considerer – 652
 Other Qatar events – 345

Source: YouGov Panel

KINGDOM OF SAUDI ARABIA

Impact of PR of Each Sustainability Initiative on Consideration of FIFA World Cup 2022

Digital tickets, locally sourced food and water conservation are the factors that will have the most positive impact on people's consideration of FIFA World Cup 2022.



"For sure' (it will make a positive impact on the audience),... let us say around 15% of the audience is well aware of it... When the audience is going to a certain event, their main target is the event itself, the details of the event are not as important... However, he will realise that he is going to a place where there is healthy food, or sustainable energy, but it will not matter... it will matter when the price of the ticket differs."

Tourism Ministry

■ Neutral Impact
 ■ Negative Impact

Source: Advanced Logistic Regression Modelling

Sample Size: General Population – 1,004

KINGDOM OF SAUDI ARABIA

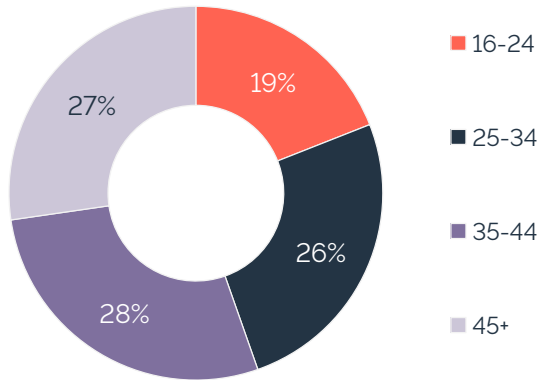
APPENDIX



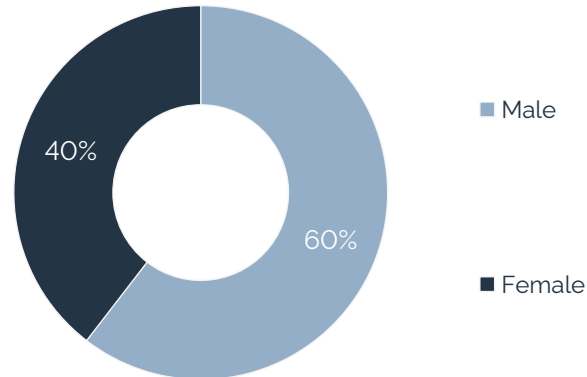
KINGDOM OF SAUDI ARABIA

DEMOGRAPHIC PROFILE OF CONSUMERS IN SAUDI ARABIA

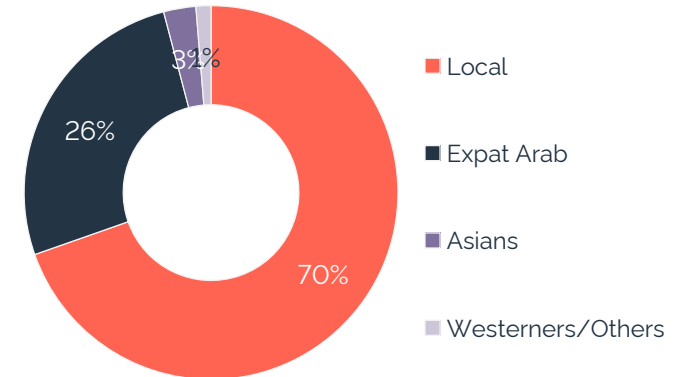
AGE



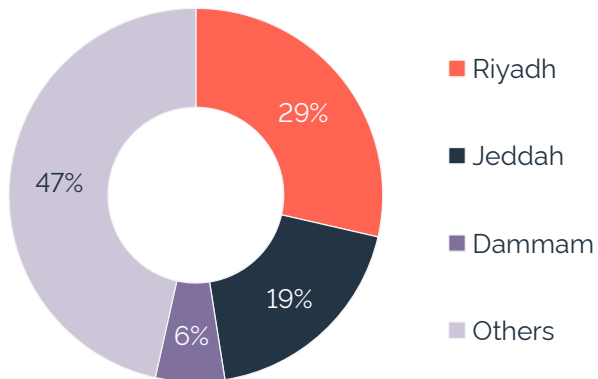
GENDER



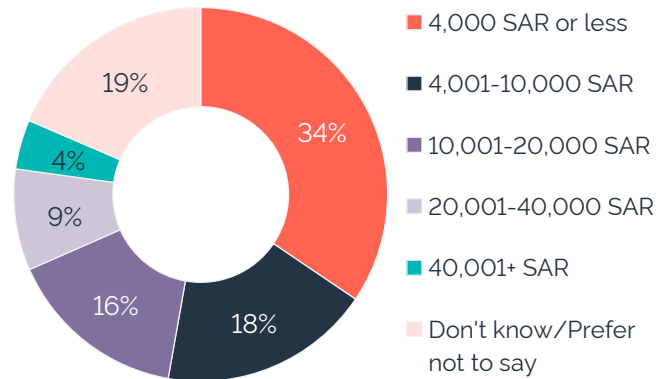
NATIONALITY



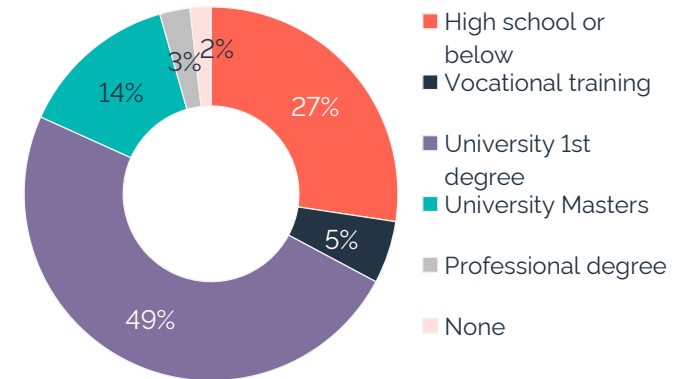
LOCATION



INCOME



EDUCATION

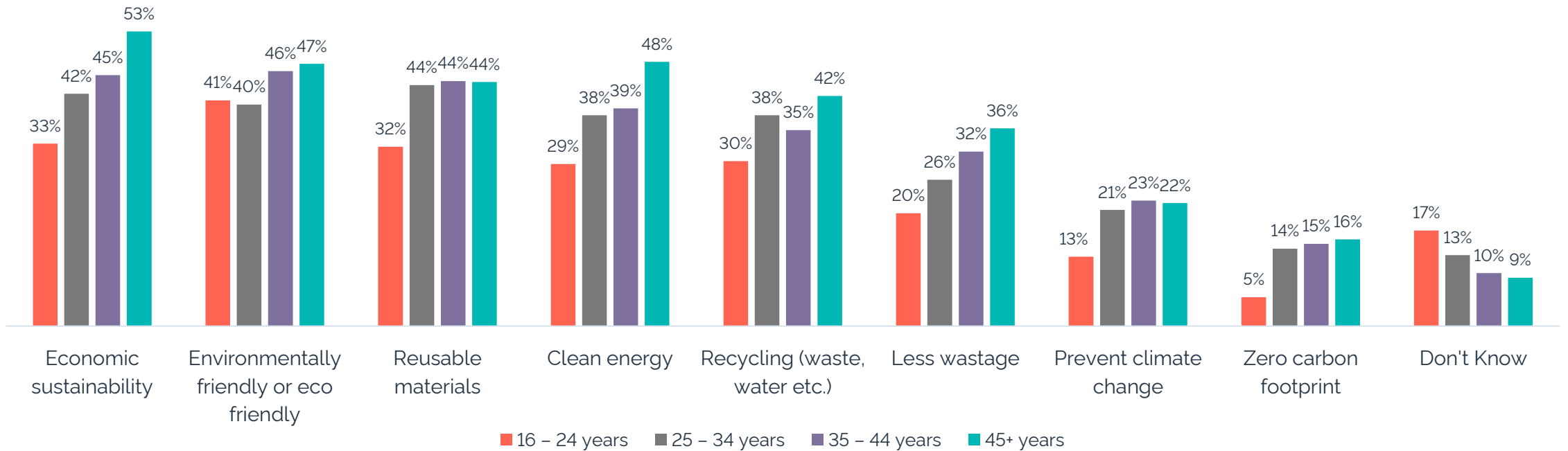


Sample Size - 1004,

KINGDOM OF SAUDI ARABIA

Awareness of sustainability in everyday life is driven by the 25+ age group – higher associations for most compared to the 18-24 years age group

PROMPTED ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' IN Kingdom of Saudi Arabia – BY AGE GROUPS



Source: YOUNGOV PANEL

Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

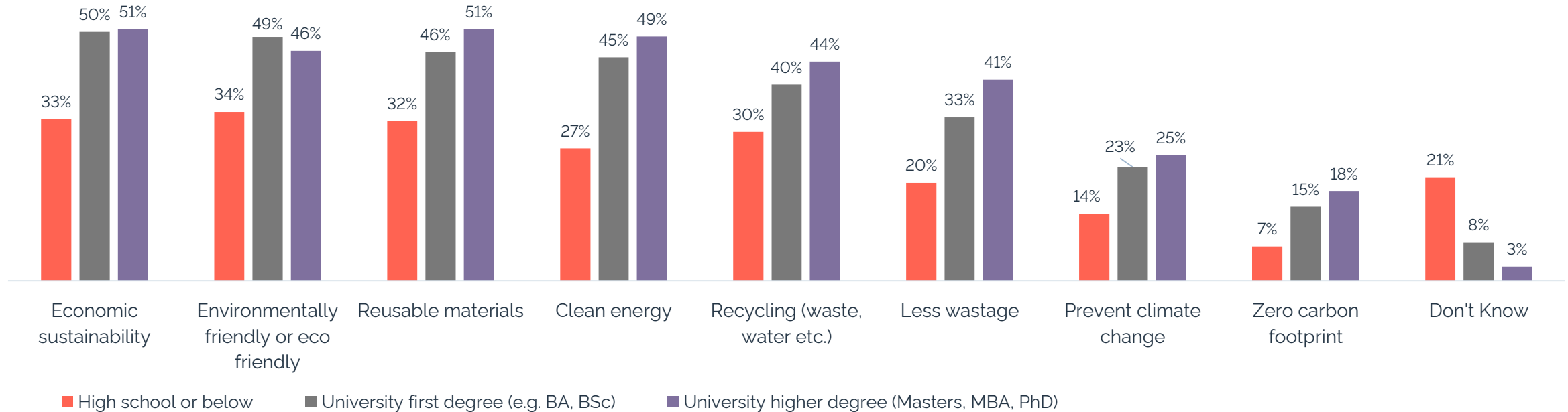
Sample Size: 16-24 years – 191, 25-34 years – 257, 35-44 years – 282, 45+ years - 274

Significant difference vs average at 95% confidence

KINGDOM OF SAUDI ARABIA

When comparing between education levels, consumers with a university degree or higher level of education drive the awareness for sustainability with significantly higher associations

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN Kingdom of Saudi Arabia - BY EDUCATION LEVELS



Source: YOUNGOV PANEL

Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

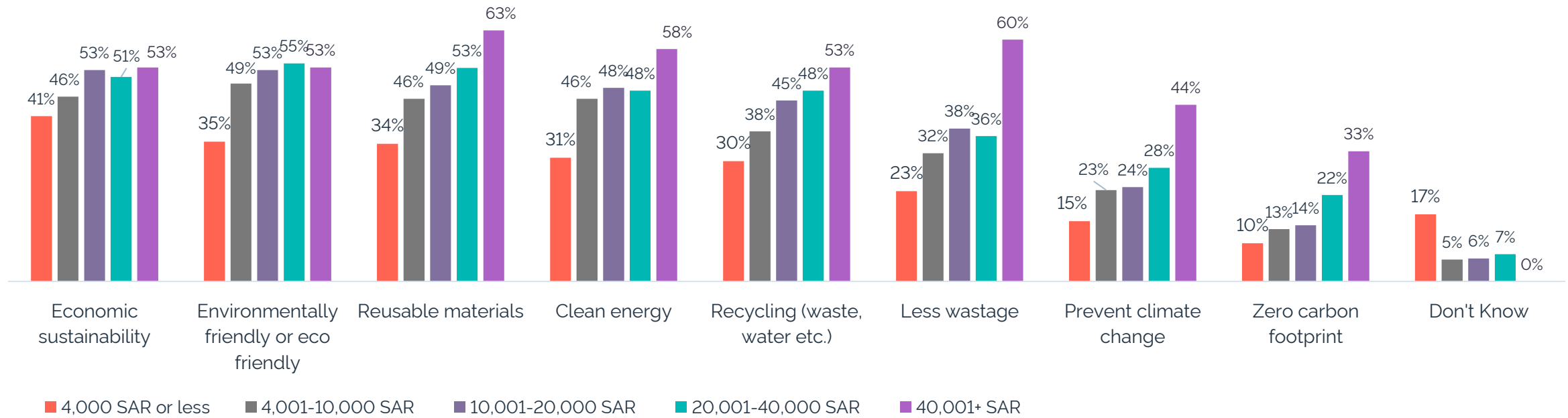
Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

Significant difference vs average at 95% confidence

KINGDOM OF SAUDI ARABIA

Middle class and higher income groups (monthly household income of 4,000 SAR+) drive awareness of sustainability

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN Kingdom of Saudi Arabia - BY INCOME LEVELS



Source: YOUNGOV PANEL

Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

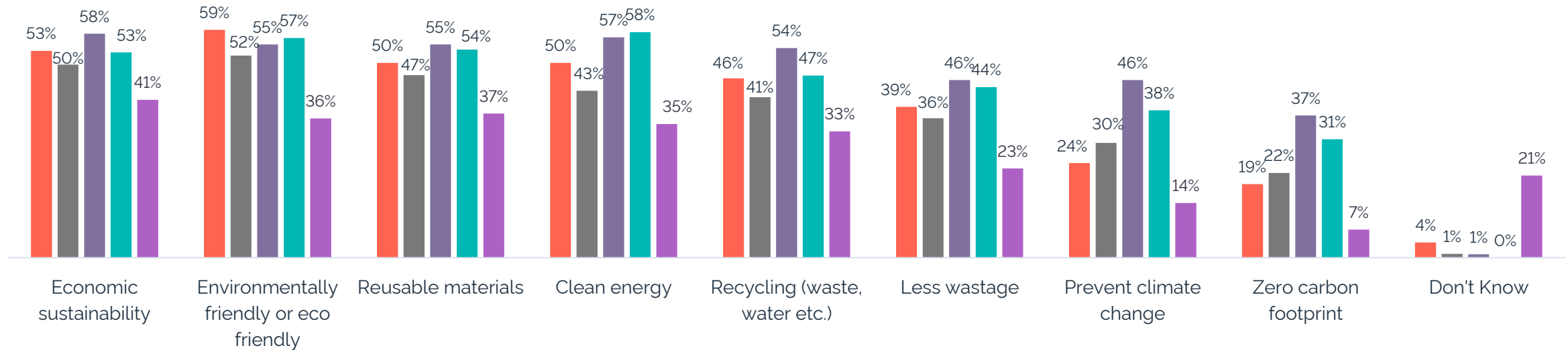
Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

Significant difference vs average at 95% confidence

KINGDOM OF SAUDI ARABIA

Fans of any sporting event in Qatar including the FIFA World Cup had significantly more awareness of sustainability initiatives compared to those who weren't interested in any sporting events in Qatar

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN Kingdom of Saudi Arabia - BY SPORTS EVENT CONSIDERED



- FIFA World Cup 2022
- Other local tournaments (equestrian, cycling, FINA, swimming, IAAF and Golf)
- ATP+WTA Tournaments
- Motorsports tournaments (Rally, Moto GP, F1H2O)

Source: YOUNGOV PANEL

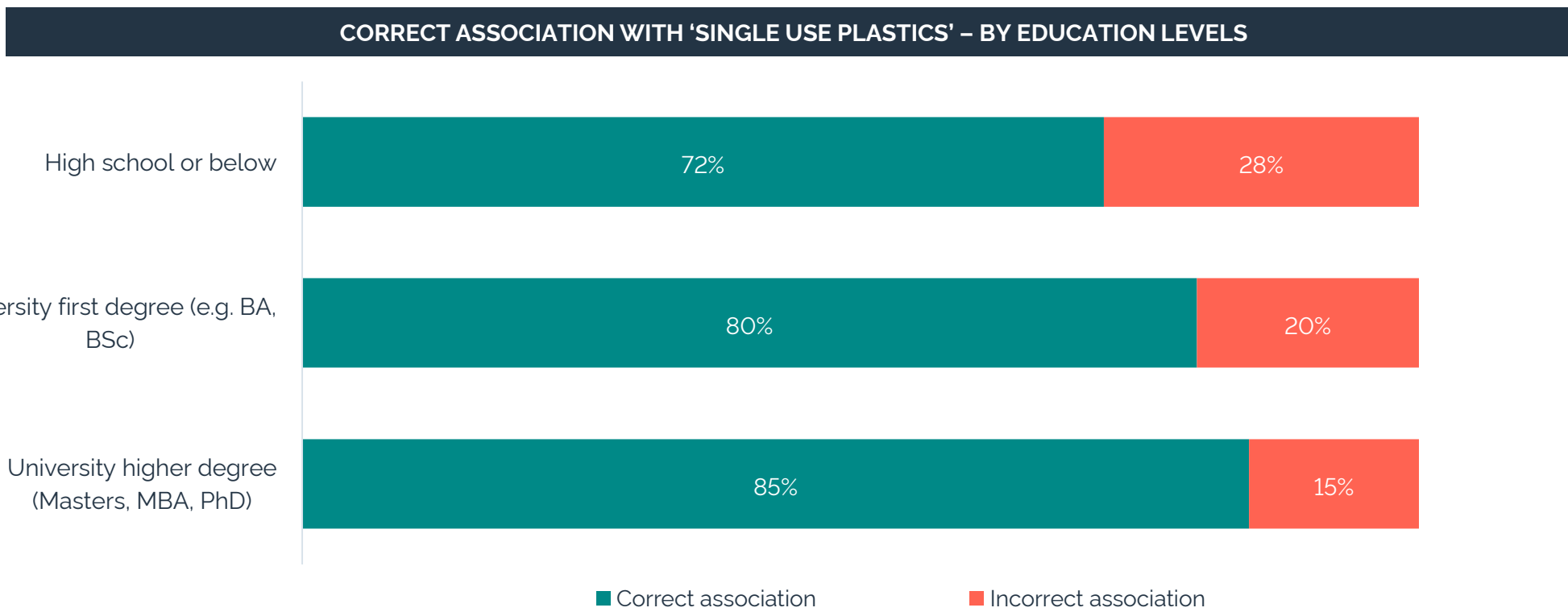
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to

Sample Size: FIFA World Cup 2022 – 221, Other Qatar events – 160, Tennis events – 65, Motorsports events – 74, No sports events - 126

Significant difference vs average at 95% confidence

KINGDOM OF SAUDI ARABIA

Correct associations with the term 'single use plastics' is directly proportional to the education level of the respondent – higher associations among those with a higher education



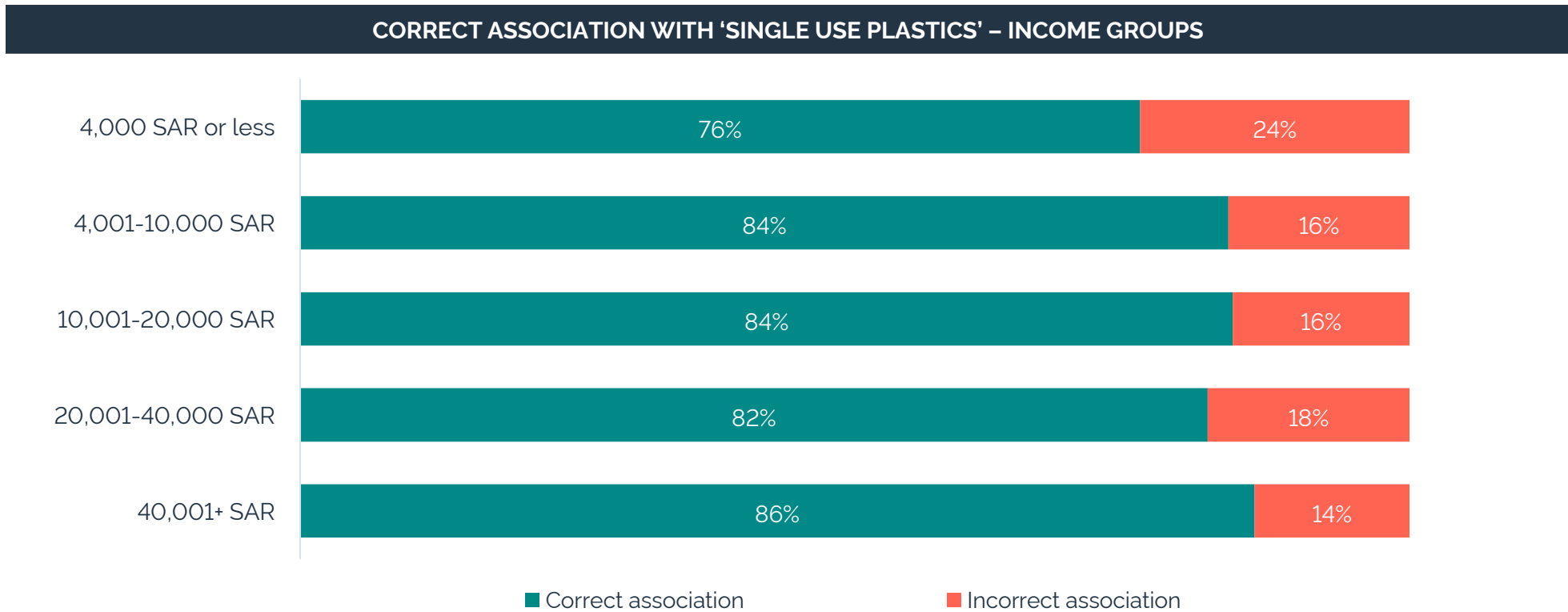
Source: YOUNGOV PANEL

Q: Which of these statements best describes what 'single use plastics' means?

Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

KINGDOM OF SAUDI ARABIA

Similar to education levels, correct associations with 'single use plastics' is also directly proportional to income level of the respondent



Source: YOUNGOV PANEL

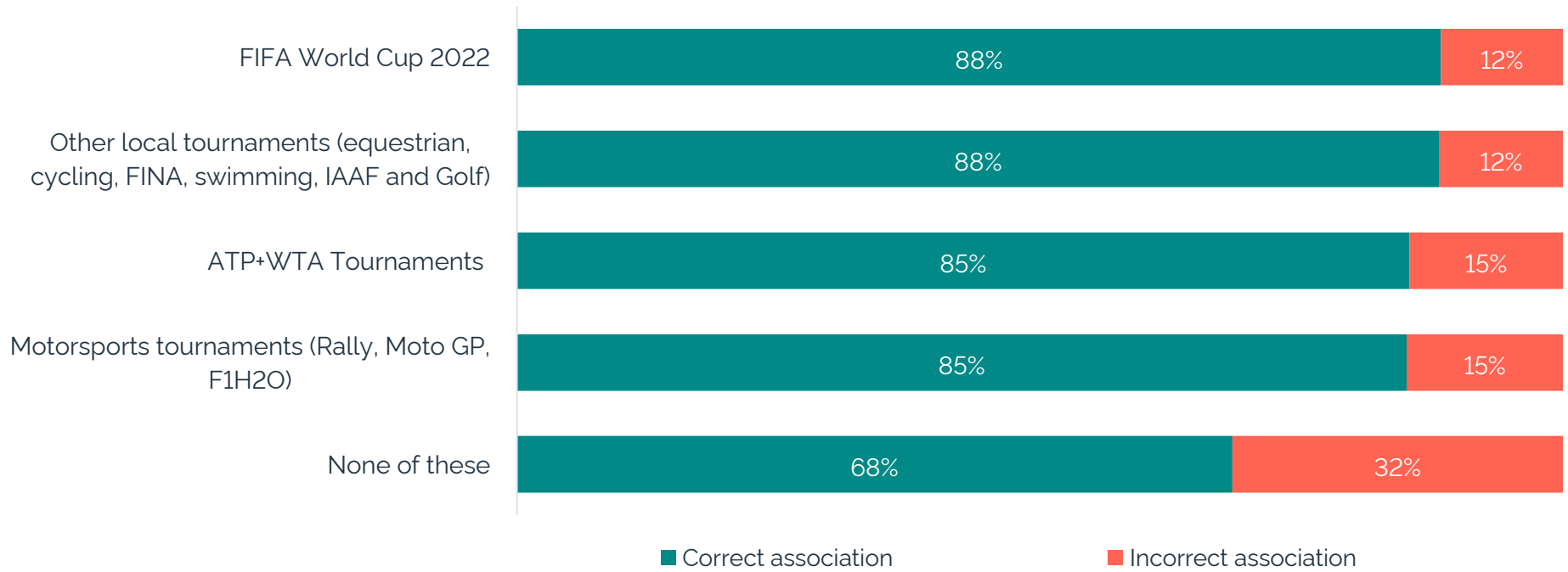
Q: Which of these statements best describes what 'single use plastics' means?

Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

KINGDOM OF SAUDI ARABIA

Those interested in sports events across Qatar correctly identify the meaning of 'single use plastics' more so than those not interested in any sports events

CORRECT ASSOCIATION WITH 'SINGLE USE PLASTICS' – BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

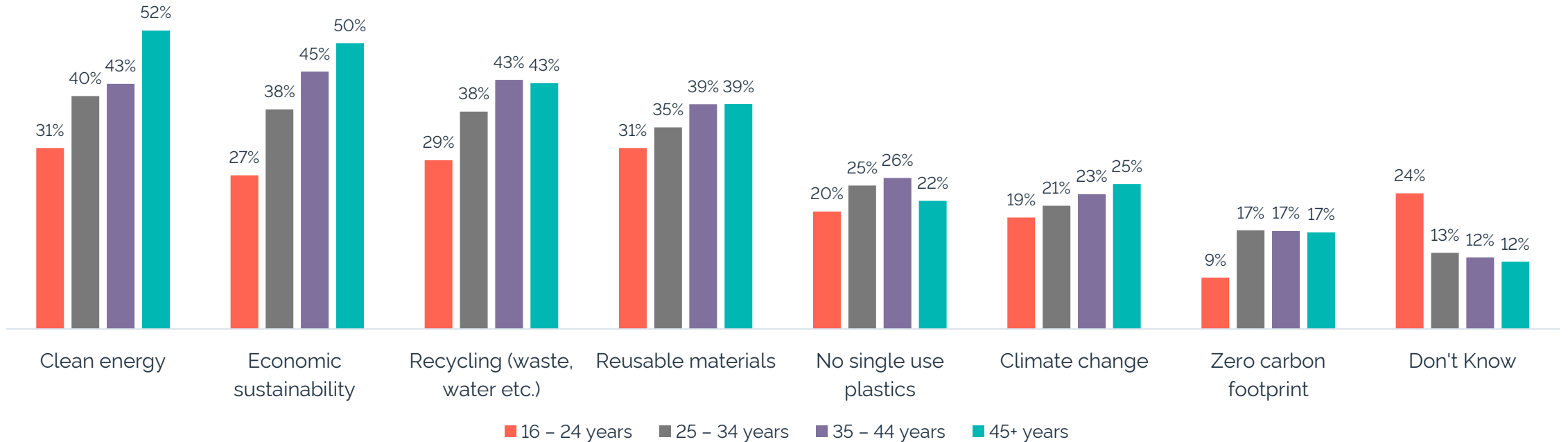
Q: Which of these statements best describes what 'single use plastics' means?

Sample Size: FIFA World Cup 2022 – 221, Other Qatar events – 160, Tennis events – 65, Motorsports events – 74, No sports events - 126

KINGDOM OF SAUDI ARABIA

Importance of sustainability initiatives become more important along with age - The older age group find all sustainability initiatives more important than younger age group

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY AGE GROUP



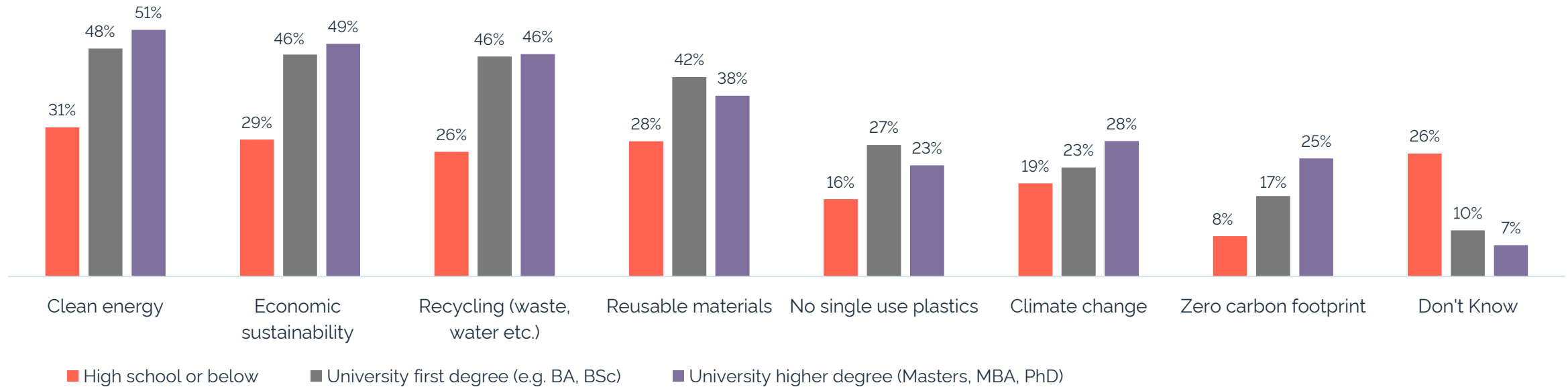
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: 16-24 years - 191, 25-34 years - 257, 35-44 years - 282, 45+ years - 274

KINGDOM OF SAUDI ARABIA

Similar to awareness, importance of sustainability initiatives are significantly more important for those with a university degree holders or higher

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

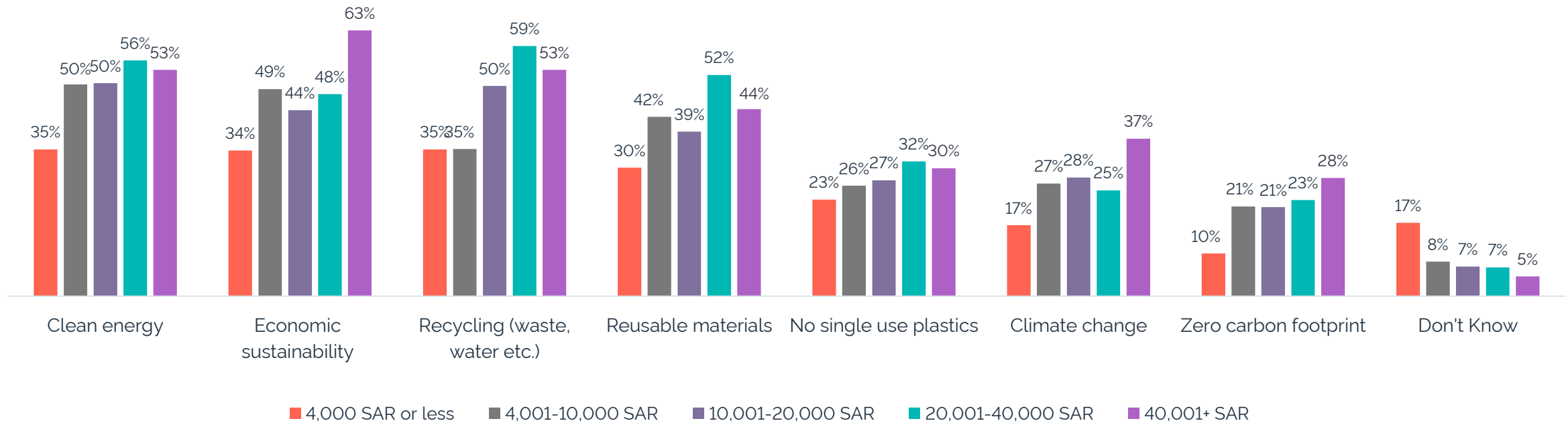
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

KINGDOM OF SAUDI ARABIA

Middle class and higher income groups (monthly household income of 4,000 SAR+) feel that sustainability initiatives are more important in their daily lives compared to lower income households

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY INCOME LEVELS



Source: YOUNGOV PANEL

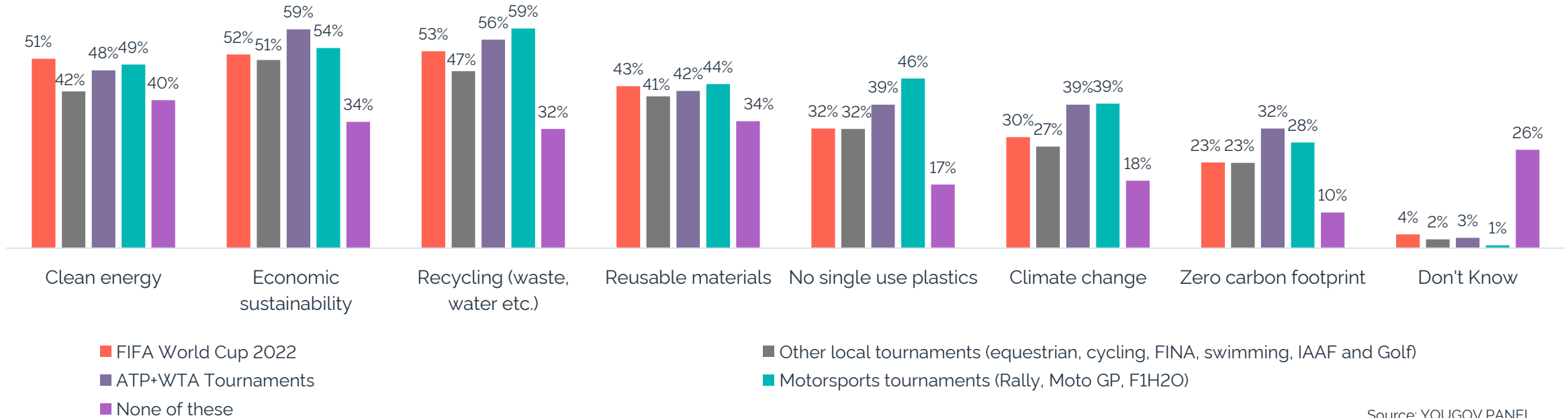
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

KINGDOM OF SAUDI ARABIA

Importance of most sustainability initiatives is significantly higher among those interested in attending Qatar sports events vs those who aren't

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

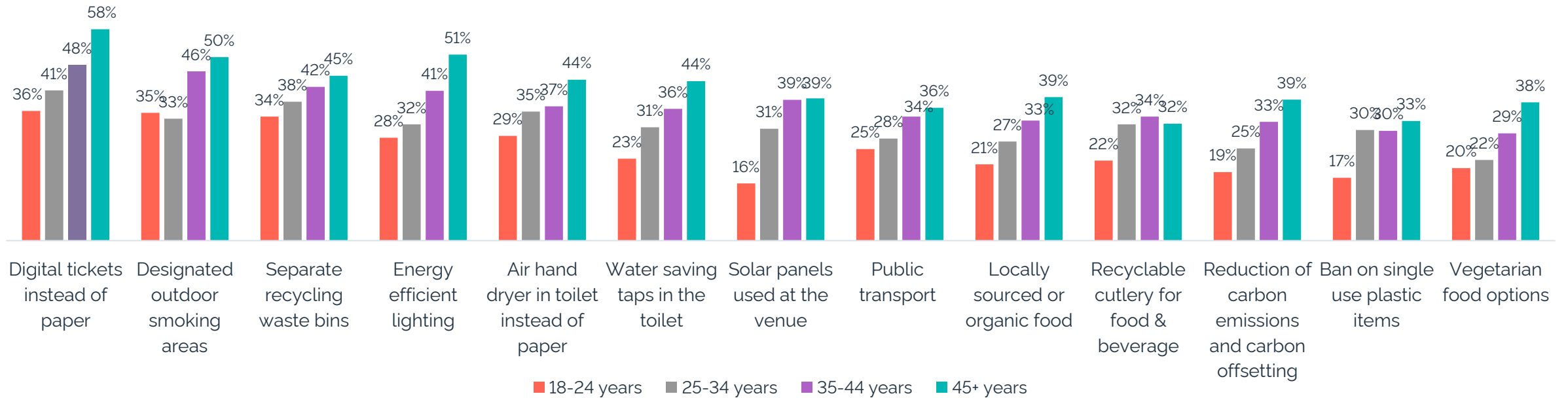
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: FIFA World Cup 2022 – 221, Other Qatar events – 160, Tennis events – 65, Motorsports events – 74, No sports events - 126

KINGDOM OF SAUDI ARABIA

The awareness of most sustainability initiatives at events is higher among the older age groups 35+

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

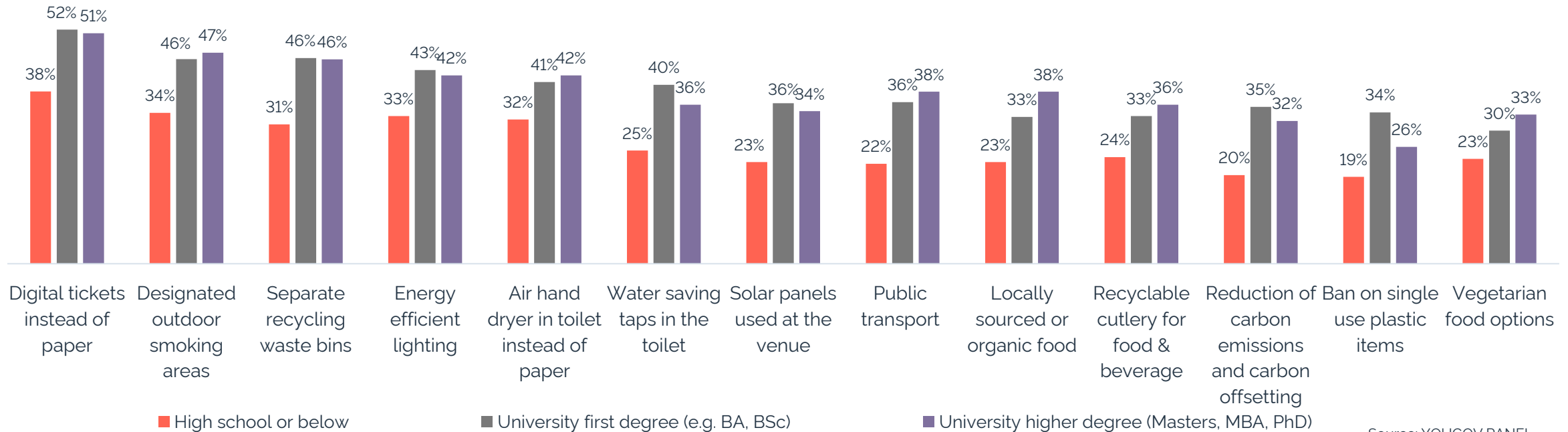
Q: Which of these environmental sustainability measures at an event/venue are you aware of either through attending events or through media sources?

Sample Size: 16-24 years – 191, 25-34 years – 257, 35-44 years – 282, 45+ years – 274

KINGDOM OF SAUDI ARABIA

Those with a university degree or more show higher awareness of sustainability initiatives at events

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

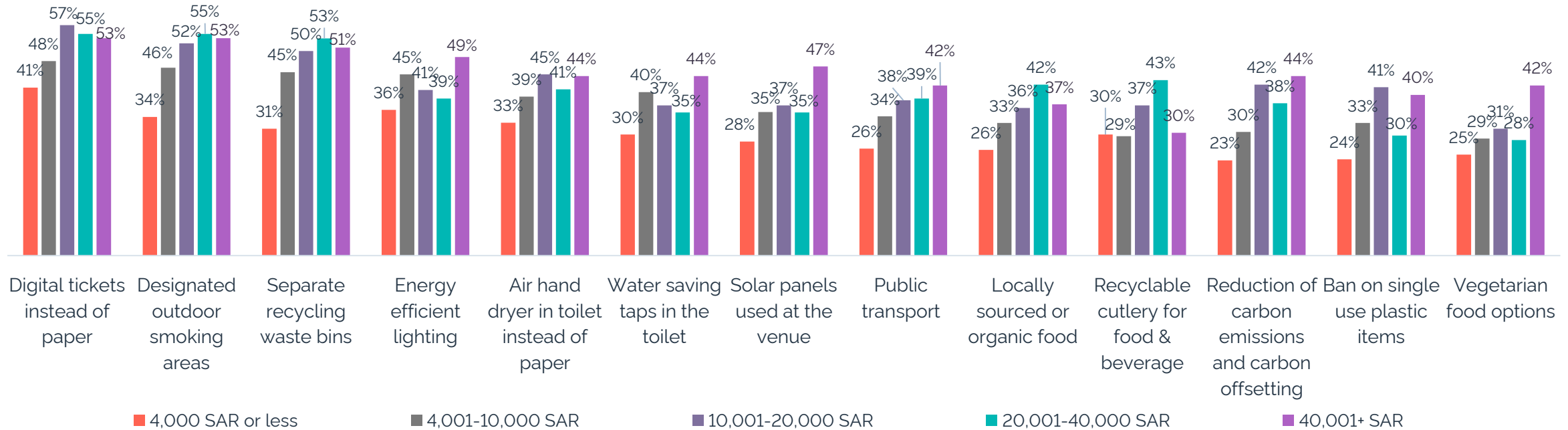
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

KINGDOM OF SAUDI ARABIA

Awareness of sustainability initiatives at events is higher among those with monthly household income of 4,000 SAR+ possibly due to these groups being able to afford to attend more events

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

Q: Which of these sustainability initiatives are important to you in your day to day life

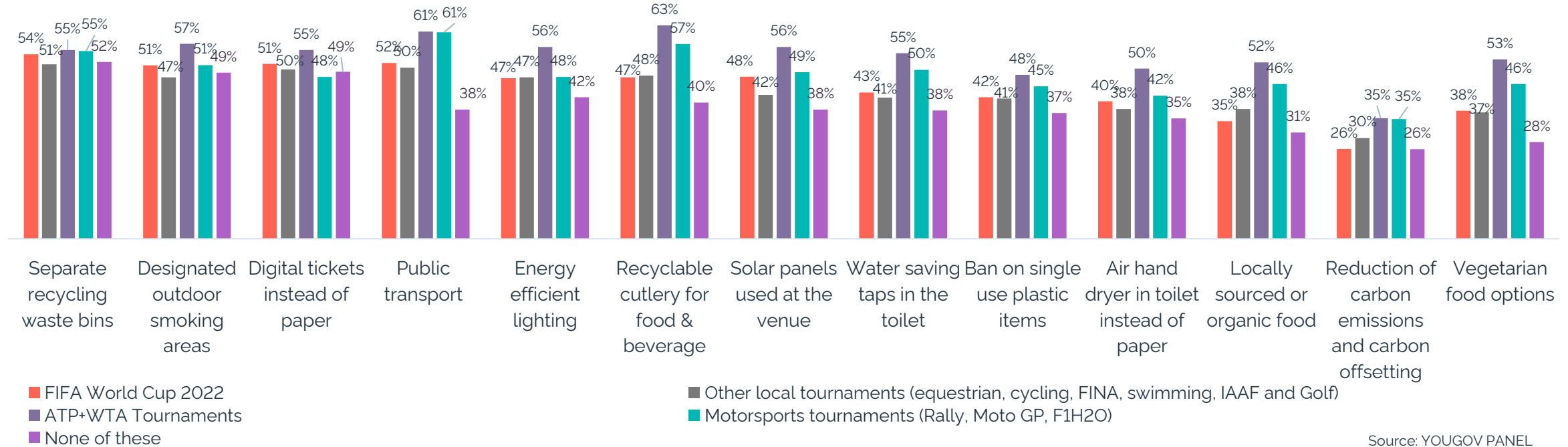
Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

KINGDOM OF SAUDI ARABIA

Waste sorting bins have similar awareness among those who attend sports events as well as those who don't, due to these bins being commonly used around Saudi Arabia

Awareness of sports event specific initiatives like public transport to venues, recyclable cutlery is more among those who consider attending events

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

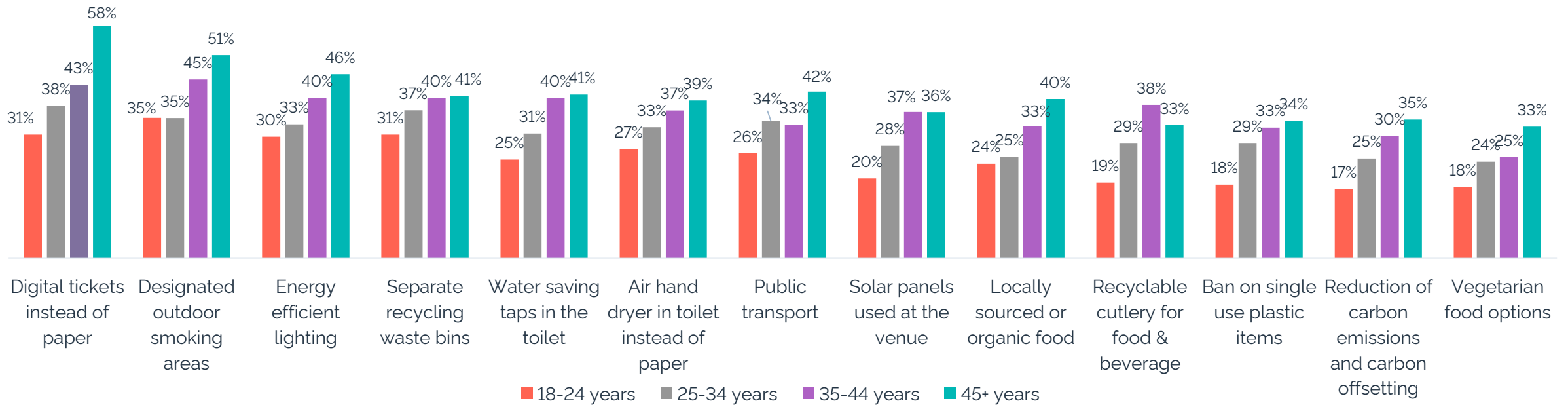
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: FIFA World Cup 2022 – 221, Other Qatar events – 160, Tennis events – 65, Motorsports events – 74, No sports events - 126

KINGDOM OF SAUDI ARABIA

Digital tickets and designated outdoor smoking areas are common occurrences in Saudi Arabia and hence the most expected at events – The demand for these is driven by the older age group

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

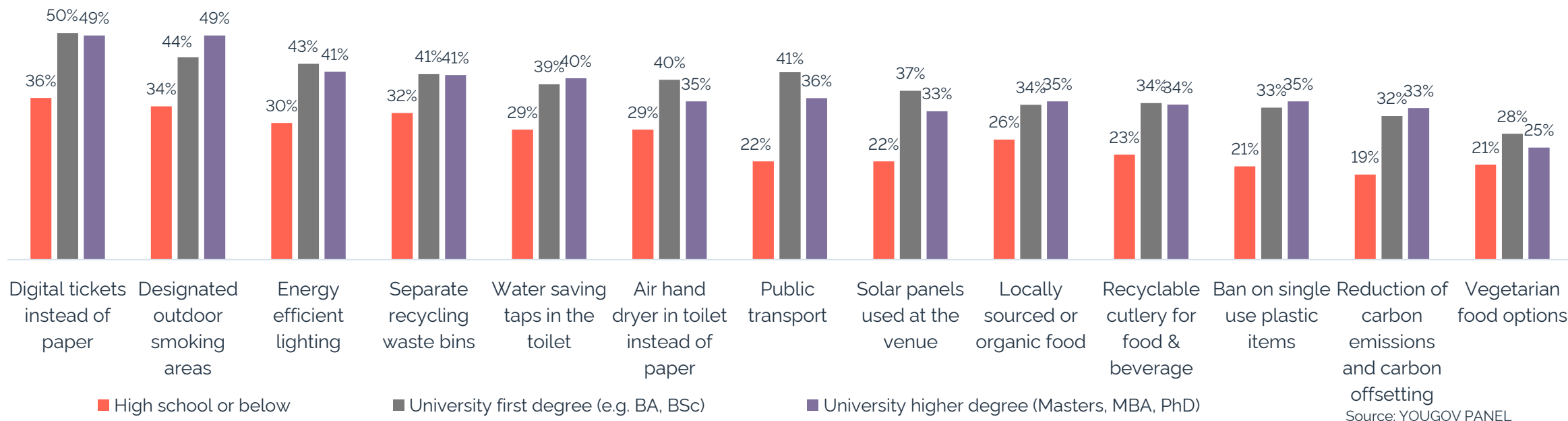
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: 16-24 years – 191, 25-34 years – 257, 35-44 years – 282, 45+ years - 274

KINGDOM OF SAUDI ARABIA

The expectation of sustainability initiatives at events is higher among those with a higher education

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

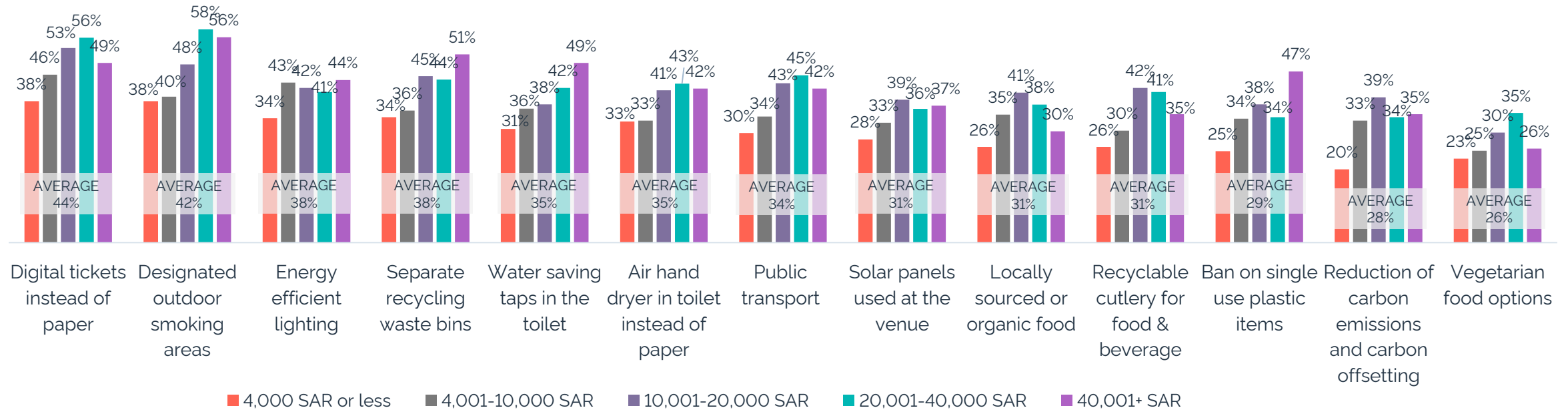
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

KINGDOM OF SAUDI ARABIA

Most of the expected sustainability initiatives at events is driven by the middle class or higher income groups - possibly because they have attended more events and hence are aware of more initiatives

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

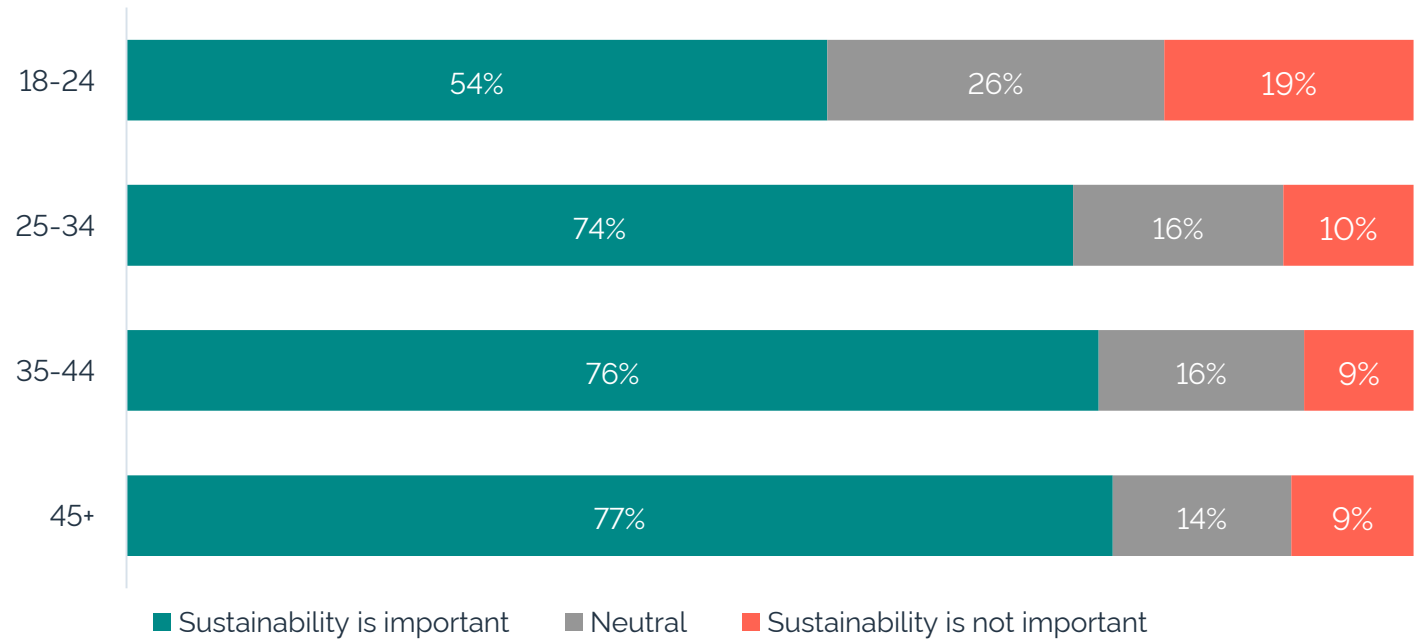
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

KINGDOM OF SAUDI ARABIA

Compared to the younger age group of 18-24 years old, sustainability is more of a decision making factor for the 25+ year age group

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY AGE GROUPS



Source: YOUNGOV PANEL

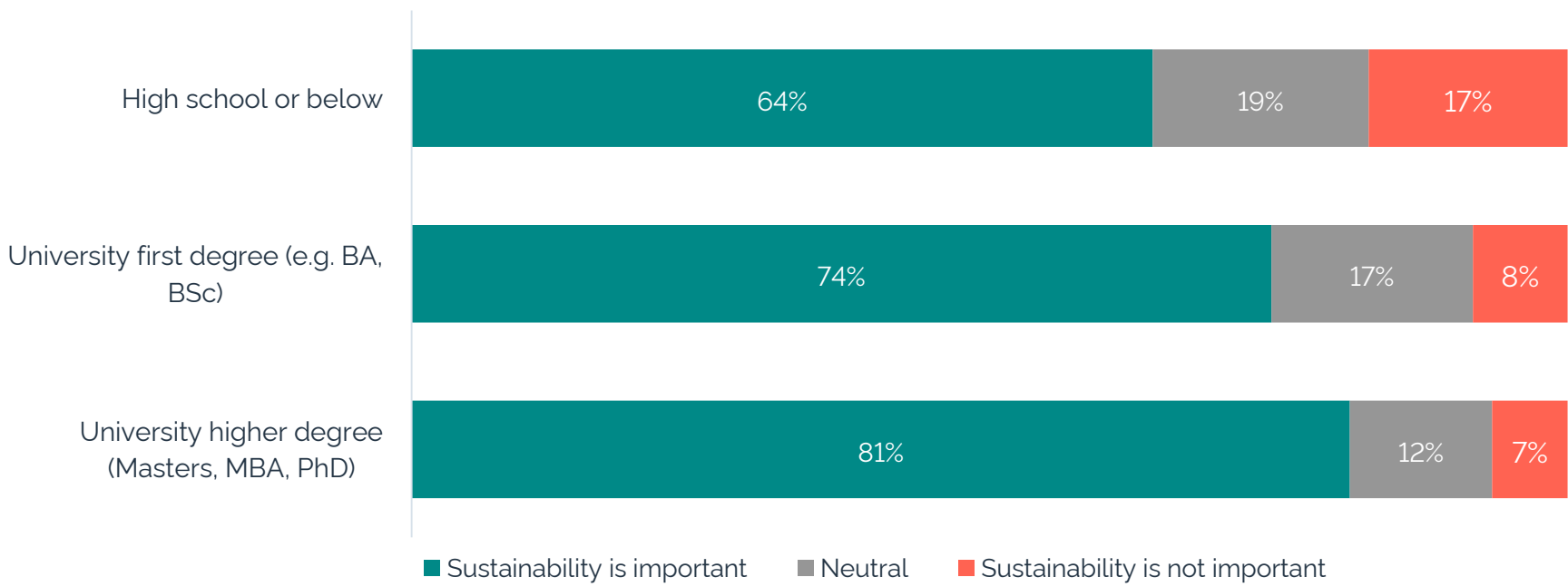
Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: 16-24 years – 191, 25-34 years – 257, 35-44 years – 282, 45+ years - 274

KINGDOM OF SAUDI ARABIA

Sustainability is also a significantly bigger decision making factor to attend events among those with a university degree or higher

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY EDUCATION LEVEL



Source: YOUNGOV PANEL

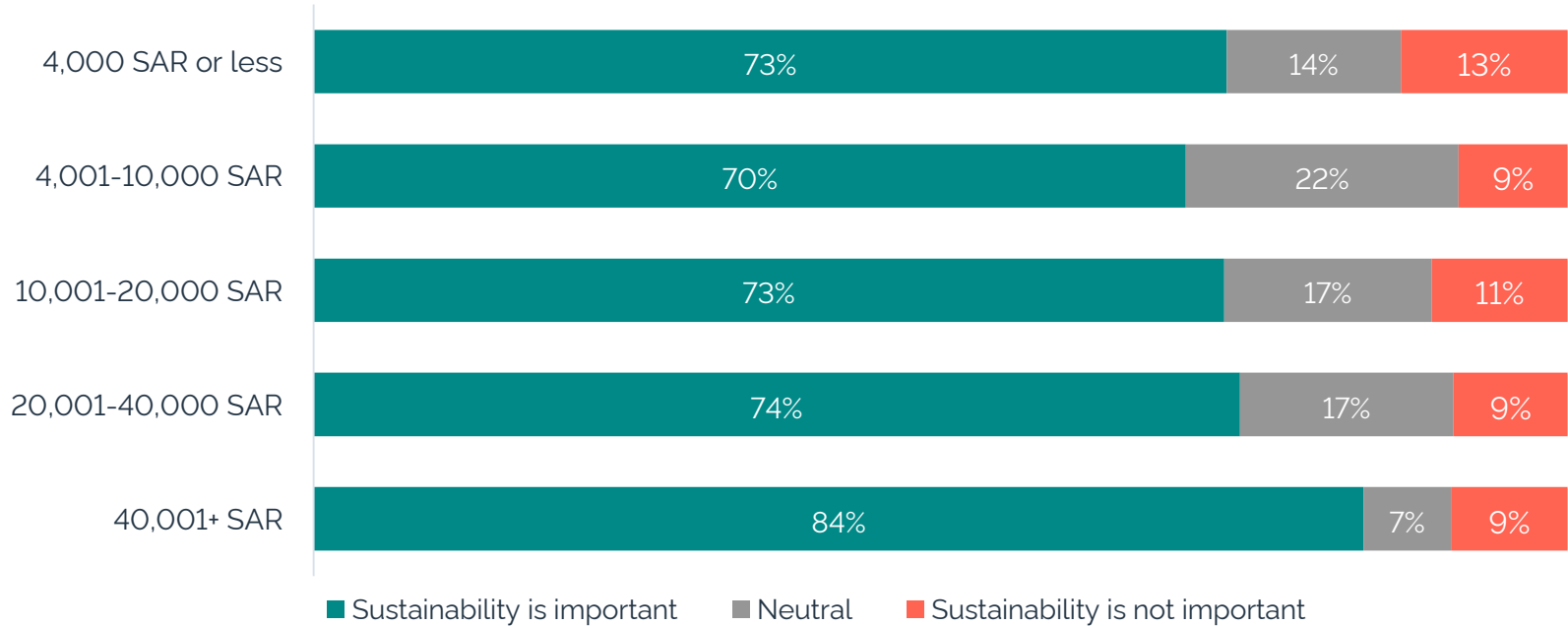
Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: High school or below – 273, University first degree – 488, University or higher – 138

KINGDOM OF SAUDI ARABIA

Those with a high income of atleast 40,000 SAR per month regard sustainability initiatives have as a bigger decision while attending events compared to other income groups

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY INCOME LEVEL



Source: YOUNGOV PANEL

Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

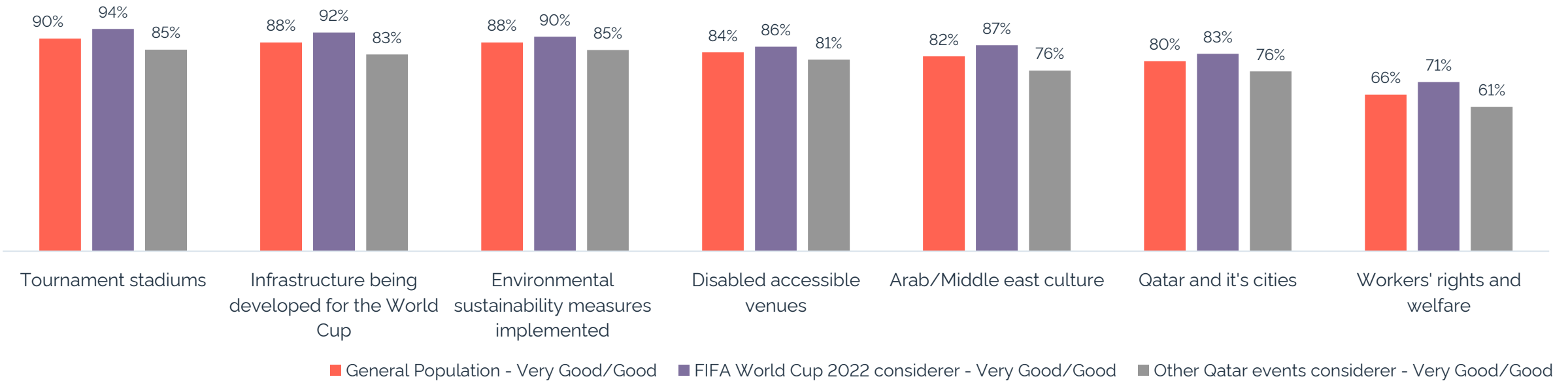
Sample Size: 4,000 SAR or less - 346, 4,001-10,000 SAR- 184, 10,000-20,000 SAR- 157, 20,001-40,000 SAR - 88, 40,001+ SAR - 43

KINGDOM OF SAUDI ARABIA

Those aware of the various aspects of the FIFA World Cup 2022 rate them high across all population groups –

Qatar's image on workers rights and welfare still needs work

POSITIVE IMPRESSION OF FIFA WORLD CUP 2022 QATAR ON VARIOUS ASPECTS



Source: YOUNGOV PANEL

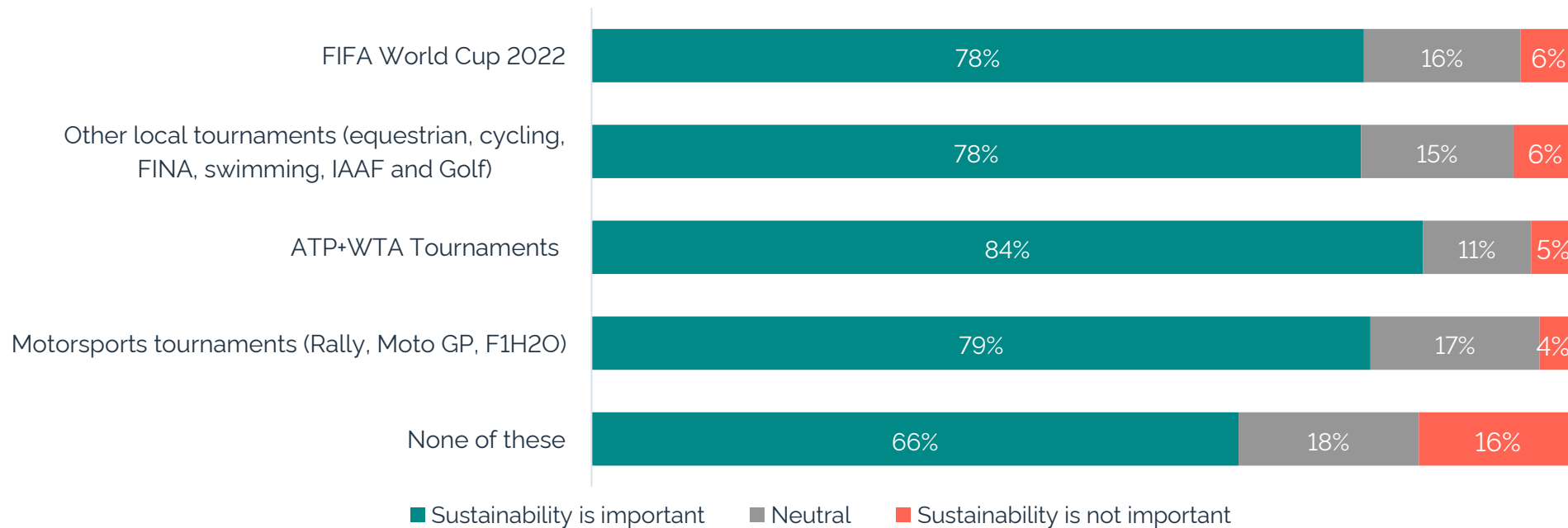
Q: Now, from the news and information that you know about this tournament, how would you rate the Qatar FIFA World Cup on the following?

Sample: Those aware of each aspect among general population, FIFA World Cup 2022 considerers and other Qatar events considerers

KINGDOM OF SAUDI ARABIA

However, importance of sustainable initiatives as an event attendance factor is significantly higher among those interested in attending Qatar sports events vs those who aren't

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY SPORTS EVENT CONSIDERED



Source: YOUGOV PANEL

Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: FIFA World Cup 2022 – 352, Other Qatar events – 297, Tennis events – 109, Motorsports events – 134, No sports events - 481

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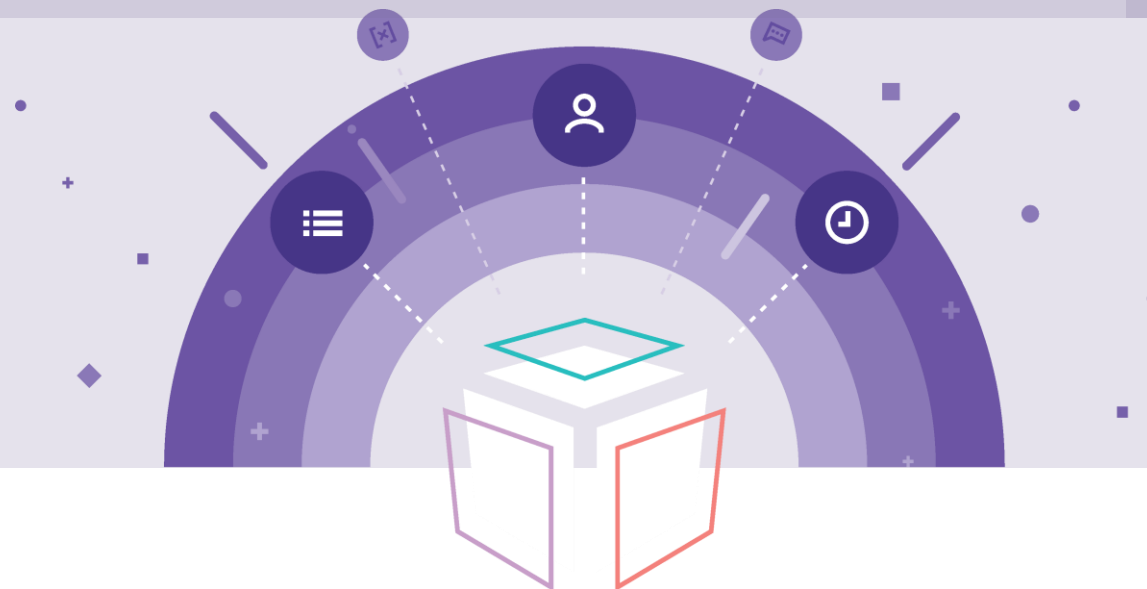
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