

# YouGov<sup>®</sup>Sport

## Qatar

Sustainability and its impact  
in sport, events and tourism  
in Qatar



## CONTENTS

### Executive Summary

1	Background & Research Methodology
2	Sustainability in everyday life and what it means to people
3	Sustainability in sports, events and tourism
4	Sustainability and the FIFA World Cup 2022
A	Appendix

### CONTACT

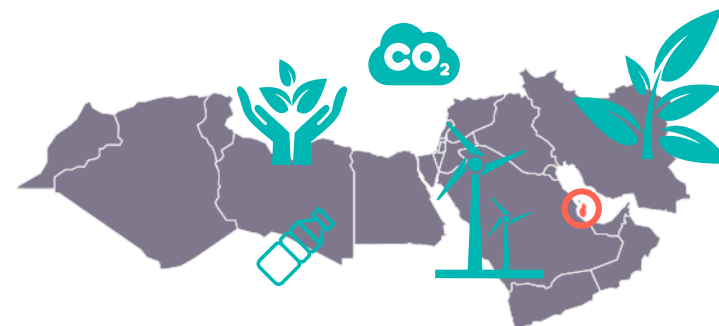
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## QATAR

# Executive Summary: Sustainability in the Qatar



## Sustainability and what it means to people

- > Qatar faces many environmental challenges that put a tremendous amount of pressure on resources.
- > Government and industry have shifted focus towards sustainability at both national and local level, with the aim of raising awareness.
- > Middle class consumers (25+) are more willing to adopt sustainability initiatives, while younger, working class people need more convincing.
- > Most consumers utilise recycling and energy saving facilities in their daily lives.

## Sustainability in sports, events and tourism

- > The average sports fan that considers attending events tends to be older males, which aligns them with the typical sustainability adopter.
- > Organisations are focusing on sustainability at events, with the aim of making them more environmentally friendly.
- > Digital ticketing & recycling facilities are implemented well at sports events but other initiatives need to be communicated better to consumers.
- > Qatar's improved public transport system is an easily adopted sustainability initiative while clarity and awareness of other features can prove a challenge.

## Sustainability and the FIFA World Cup 2022

- > Sustainability at the World Cup is higher on consumers radar, with ticketing and recycling features coming to the fore.
- > PR around sustainability would have an impact on consumers with communications around digital ticketing, recycling facilities and carbon reducing features are 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 the environment, like waste management, carbon emissions and single use plastics.
- > Currently sustainability is better adopted among the middle classes, so future initiatives by the government and commercial industry should specifically aim to appeal to younger groups from lower education and income backgrounds.

## Sustainability in sports

- > Sports venues and event holders should endorse initiatives which aim to implement sustainability at an events planning stage, making future initiatives much easier to adopt and improve their sustainability profile, and therefore making it more likely for consumers to expect them in the future.
- > Events should exhibit a variety of clearly visible sustainability facilities at every stage of a consumers journey to raise awareness about specific initiatives and potentially open new lines of communications with those less likely to adopt sustainability in their daily lives (namely young males) with the aim of converting them into adopters.

## Sustainability and the FIFA World Cup 2022

- > Advertise initiatives around efficient ease of use, like digital ticketing, and recycling facilities at the event with particular focus on carbon reducing features.
- > Although messaging around well established initiatives like recycling has the most traction, marketing should avoid highlighting too mundane elements like hand dryers as this can leave a negative impression on consumers.

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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 (online) general population using YouGov's partner panel in Qatar
- > Interview length 10 minutes
- > Achieved sample size: 742 respondents

## IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry professionals
- > Interview length 15 minutes
- > Industry professionals interviewed in Qatar – 5

## 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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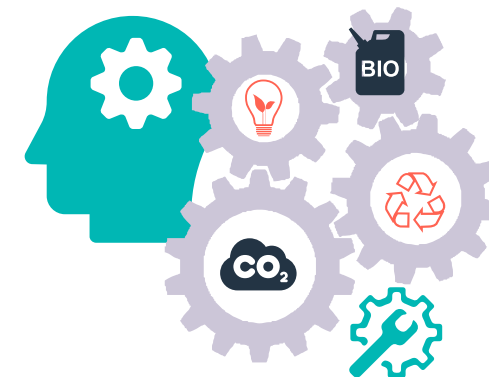
# Sustainability in everyday life and what it means to people

2



QATAR · SUSTAINABILITY IN EVERYDAY LIFE AND WHAT IT MEANS TO PEOPLE

# Section Summary



The majority of (online) Qatari residents are aware of sustainability and have a strong sense of environmental pressures

Qatar has recently begun planning many consumer facing sustainability initiatives both at a government and local level

Qatari consumers strongly associate 'sustainability' as being 'eco friendly' and are actively working towards economic sustainability in their daily lives

Qatari residents are aware of 'single use plastics' and its limitations but do not currently consider their ban a priority compared to other sustainability initiatives

'Clean energy', 'recycling', 'reusable materials' and 'economic sustainability' are the most important aspects of sustainability in Qatari consumers' everyday life

Middle class Qatari residents over 25 are more aware of, and likely to adopt sustainability initiatives. While younger residents with lower education and income are less knowledgeable about sustainability

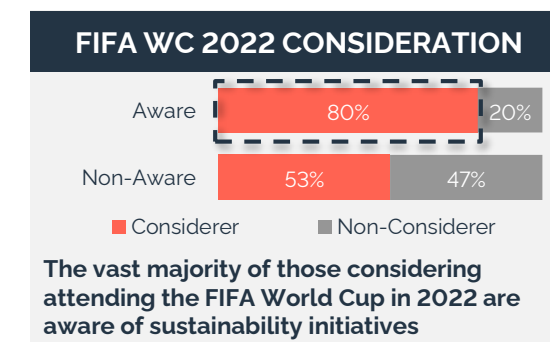
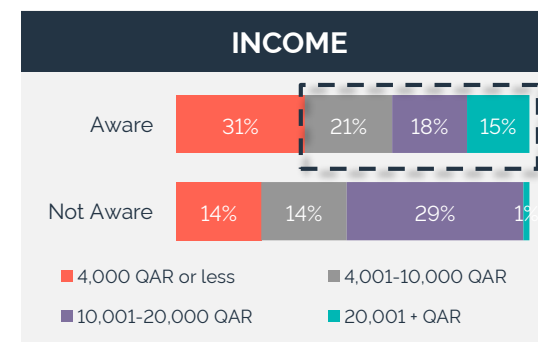
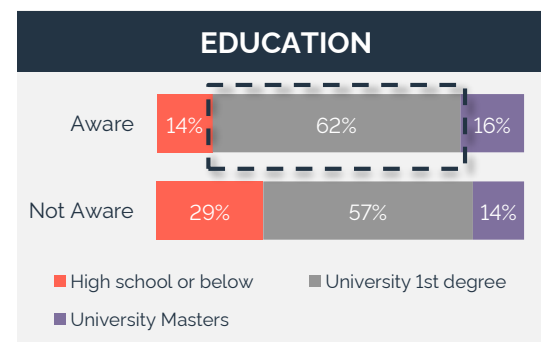
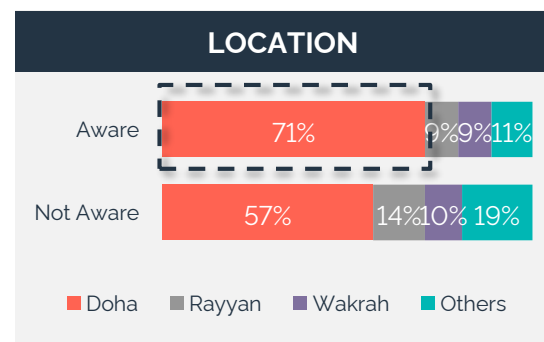
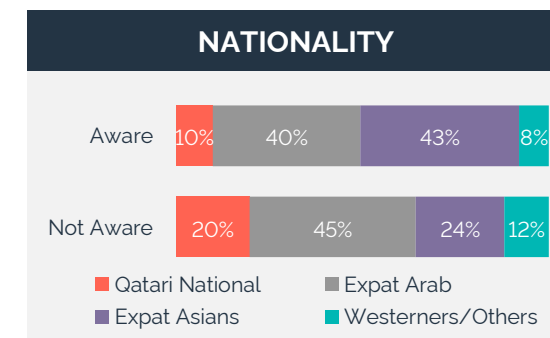
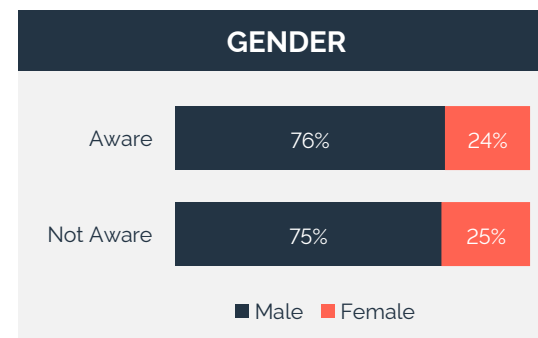
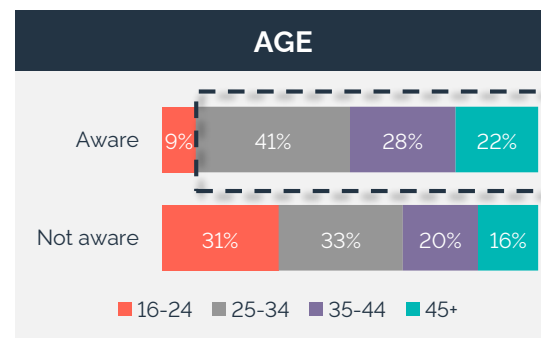
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# Awareness of Sustainability Initiatives

Most Qatari residents are aware of sustainability as a concept. Consumers with higher education and income tend to be more aware and this is the case across most age groups. The under 25s are however, less knowledgeable. As the majority population, those living in Doha are also much more likely to be exposed and therefore aware.



## Demographic Profile



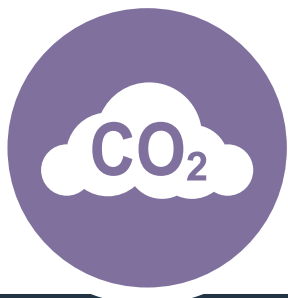
Source: Partner Panel

Sample Size: Aware - 688  
Not aware - 51 (LOW BASE)

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# Environmental Challenges

There are a number of environmental challenges on the road to attaining economical sustainability in Qatar



## POLLUTION

Pollution in general is a serious issue in Qatar; whether, soil, air or marine and the affects are widespread and threatens environmental sustainability.



## CLIMATE

Qatar's hot, low rainfall climate makes environmental stability difficult to maintain and forces people to rely on energy producing equipment.



## LIMITED WATER

A major environmental concern for Qatar is protecting it's natural water recourses as the country has one of the highest per capita water consumption rates in the world.



## POPULATION

Qatar's population growth rate and rising urbanisation has led to an increase in waste and emissions which puts a lot of pressure on environmental resources.

Source: Qatar Government Portal. 2020

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# Sustainability Awareness

A recently conducted environmental study suggests that people who live in Qatar have an acute sense of environmental pressures, their causes and the sacrifices required to live sustainably

## GENERAL ATTITUDES ABOUT SUSTAINABILITY (% AGREE)



A small proportion of the population (less than 1 in 5) feel environmental issues are less important

19%

Environment is a low priority compared to other things in my life

15%

It is acceptable to deplete natural resources for economic growth

Source: Desk Research, Case study of event sustainability from James Stibbs and Tony Hanscomb.

Data from joint study by Qatar Environment and Energy Research Institute (QEERI) and the Ministry of Development Planning and Statistics (MDPS) Source: QEERI

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## GOVERNMENT LED INITIATIVES

## – Transport

*Doha*

Qatar is implementing large scale sustainable infrastructure projects such as the **Doha Metro**, which is fast becoming one of the most widely used modes of transport and offers an alternative to more environmentally harmful modes of transport like buses and cars.

**Doha Metro**

- > Services the 20,000 students studying at the Qatar University
- > Has cut down rush hour traffic congestions in Doha by 25%
- > Easy connectivity for all FIFA World Cup 2022 venues
- > Has cut down travel costs by more than 50%



Source: Desk Research, Gulf Times. ThePeninsularQatar

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## GOVERNMENT LED INITIATIVES

## – Water Management

Qatar has one of the highest per-capita water consumption rates in the world. In order to regulate its usage, Qatar General Electricity and Water Corporation (**KAHRAMAA**) passed the National Water Act

### KAHRAMAA National Water Act

- > Awareness Drives regarding water wastage were launched in government offices, mosques, schools as well as for homes through physical sources like posters and pamphlets, plus social media.
- > Heavy fines up to QAR 20,000 for wasting water were announced with repeat offenders being fined triple.
- > Fines extend to wasting electricity – such as outside lighting found to be switched on between 7am and 4.30pm.
- > The aim of the programme was to cut water waste by 35 percent, and electricity wastage by 20 percent.

Source: The Gulf Times





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## SUSTAINABILITY IN THE COMMUNITY

## – Environment

Launched in 2019, **SustainableQATAR** is a group dedicated to driving community awareness and action for environmental sustainability issues relevant to Qatar through personal actions



Online platforms support 2 flagship programmes involving the community in environmental sustainability initiatives:

- > 52 week challenge
- > Young Ambassadors academy

## SustainableQATAR 52 week challenge

- > A weekly personal challenge is set based on a selected theme with the aim of having an environmental impact. This is done via social media.
- > A mix of individuals and volunteers, both local and expat who take part in the challenge are encouraged to post pictures on the group's social media page.
- > Over the course of the year, the 52 challenges hope to raise awareness of environmental sustainability in the community.
- > #SustainableQATAR and #52Challenges are creating a large community of sustainability enthusiasts who will help spread the word.



Source: Sustainable Qatar website, year 2020; iloveQatar website, year 2020

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## SUSTAINABILITY IN THE INDUSTRY

## – Zero Waste

Local markets with zero-waste events as goals are being established, such as **Torba Farmers' Market**

**Torba Farmers' Market**

- > During the event, the market sells consciously sourced products such as locally farmed produce and environmentally friendly home and beauty products.
- > No single use plastics used at the event.
- > Patrons are encouraged to bring their own cutlery. Otherwise, volunteers will issue free reusable cutlery.
- > The market is open throughout the year and receives more than 5,000 visitors per weekend.



Source: The Jarkarta Post



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## SUSTAINABILITY IN THE INDUSTRY

## – Qatar Sustainability Week

**Qatar Building Council** hosts an annual event open to both public and industry to showcase the latest developments in the world of sustainability.

### Qatar Sustainability Week

- Qatar Sustainability Week, aims to engage the community in a wide range of sustainability-oriented activities.
- Launched in 2016, the event connects interested individuals to sustainability themed events hosted by local corporations.
- Events can range from awareness campaigns to interactive sessions where people are able to contribute.
- This initiative plays a crucial role in raising awareness in the community.



Source: Qatargbc.org

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# Word Association

Unaided, consumers in Qatar associate the word 'Sustainability' with phrases like 'long term', 'continuous', 'eco friendly', 'stable' and 'environment'

## 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.



'Sustainable Development' is also a term that is more associated by Qatar compared to other markets

Source: Partner Panel

Sample Size - 742

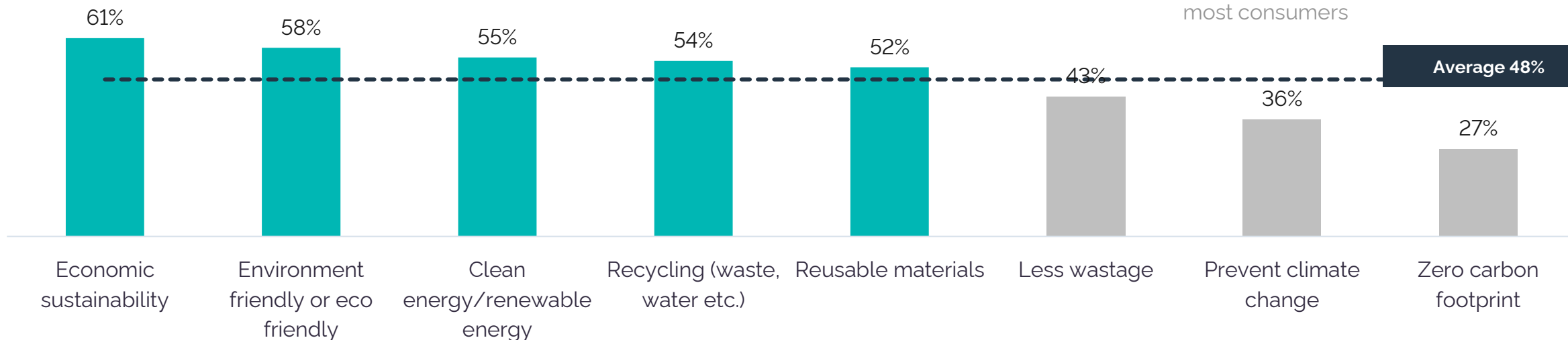
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# Prompted Association

Once prompted, consumers strongly associate sustainability with '*Economic sustainability*' and being '*eco friendly*', while aspects like '*clean energy*' and '*recycling*' are also closely linked.

## PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' – QATAR 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.



Source: Partner Panel

Sample Size - 742,

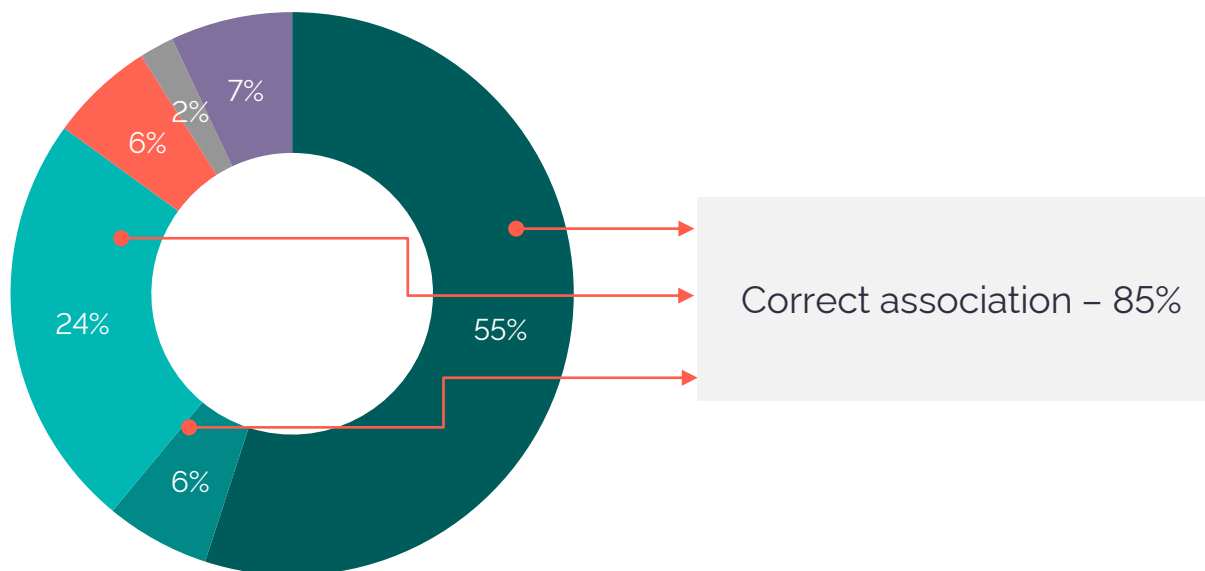
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# Single Use Plastics

Knowledge of '*single use plastics*' is high in Qatar with close to 9 in 10 consumers aware of the material and its limited usage.

## 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
- Both 1 and 2
- Plastics that you use many times

- Multi-use plastic items discarded after using once
- Thin or weak looking plastic items
- Don't know

Source: Partner Panel

Sample Size - 742,

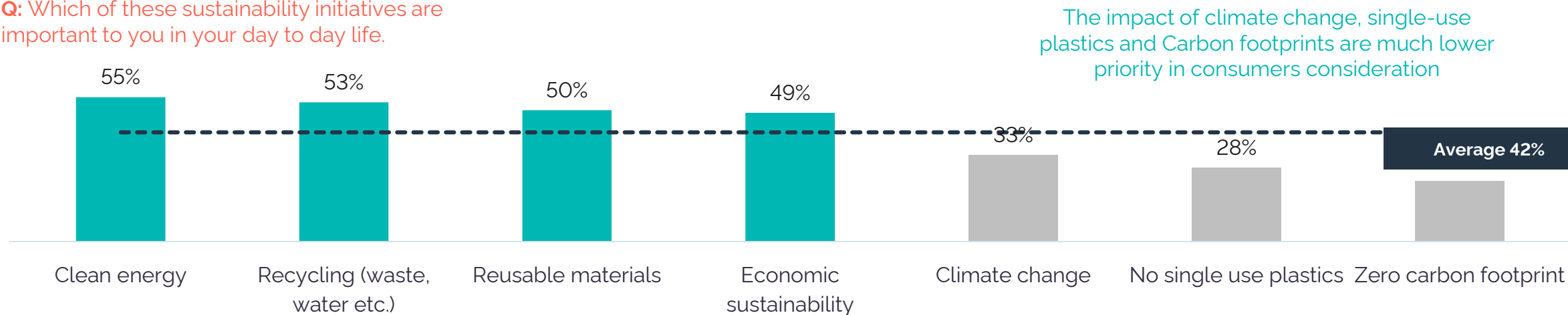
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# Sustainability Initiatives Important to People

Clean energy, recycling, and reusable materials are the most important sustainability initiatives for consumers in their daily lives.

## SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – GENERAL POPULATION

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



"In general, the provision of water bottles is the most (area in need of attention), and the plastic bags that people throw along, if there is an alternative material for it like leather or cloth, it will be better. But this should be available in the whole country."

*Tourism Industry*

Source: Partner Panel

Sample Size - 742,

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# Awareness vs Importance

The more familiar sustainability features are the most widely adopted; global issues which are potentially less understood/relevant in a consumer's everyday life are 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: Partner Panel

Sample Size – 742

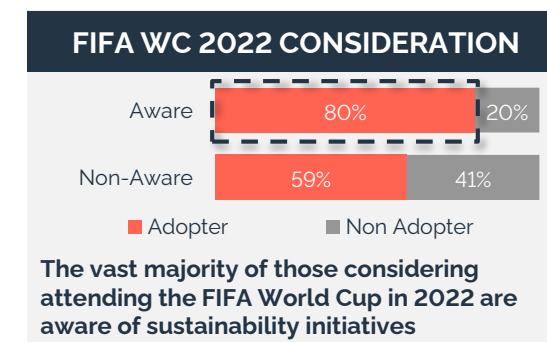
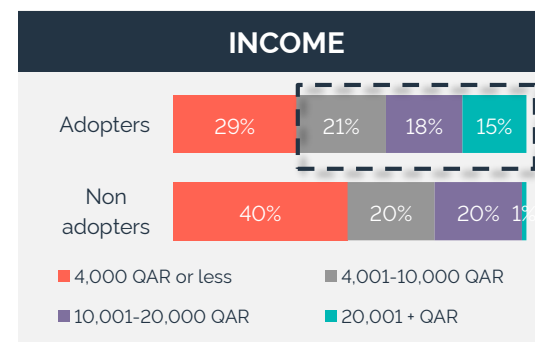
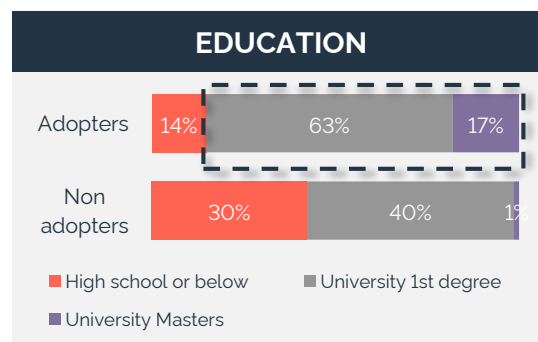
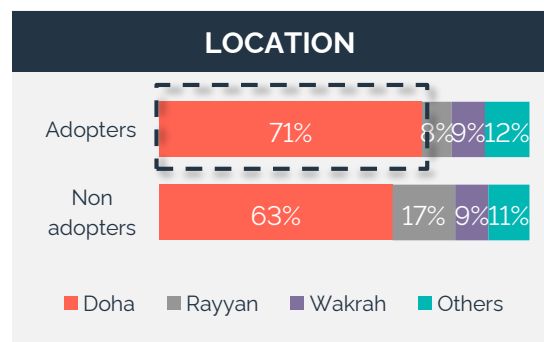
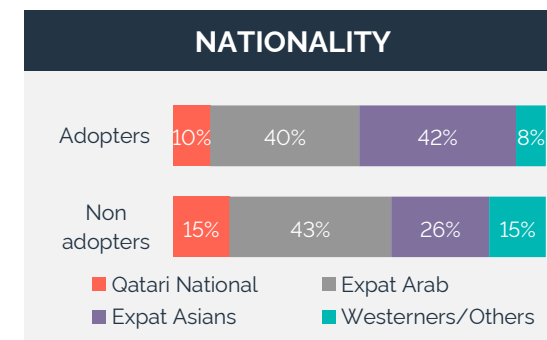
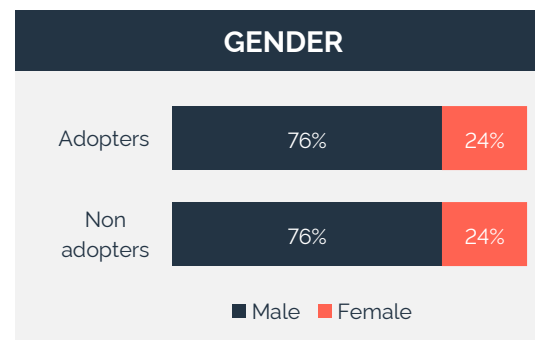
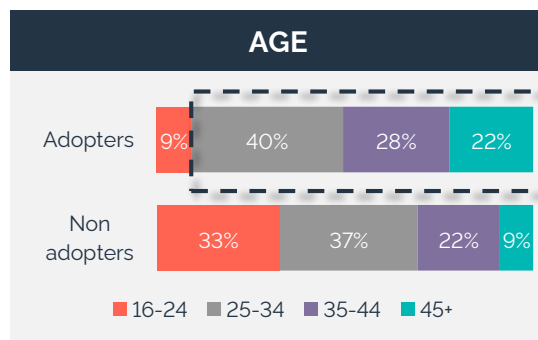
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# Adopters of Sustainability Initiatives

Most age groups are likely to be adopters of sustainability initiatives with only the <25s over-indexing in non-adoption; Similar to the awareness profile, those who adopt sustainability are more likely to be in the higher educated and income groups, and in the Doha area.



## Demographic Profile



Source: Partner Panel

Sample Size: Adopter - 697  
Non Adopter - 46 (LOW BASE)

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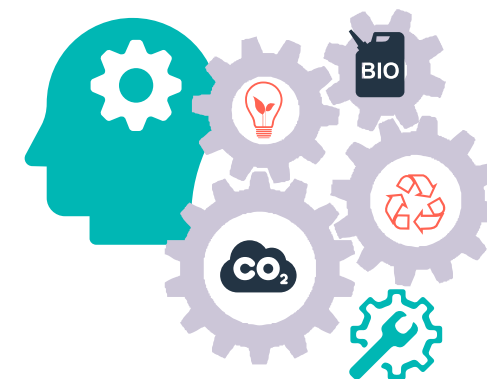
# Sustainability in sports, events and tourism



# 3



# Section Summary



The average Qatar resident sport fan who considers attending major events tends to be the older male with higher education and income; potentially making them a likely adopter of sustainability initiatives.

Sustainability in sports, events and tourism is a major concern and to address this the UN created the 'Sports for Climate Action Framework' which asks members to promote positive environmental change.

The vast majority of Qatar resident consumers are aware of sustainability initiatives at tourism and sporting events.

'Digital tickets', 'designated outdoor smoking zones', 'public transport' and 'waste sorting bins' are sustainability measures that people are aware of as well as expect at events.

Sustainability features that are important to consumers do drive their decision to attend an event.

Well established sustainability features are the most likely to be implemented easily but compliance and awareness may be the challenges.

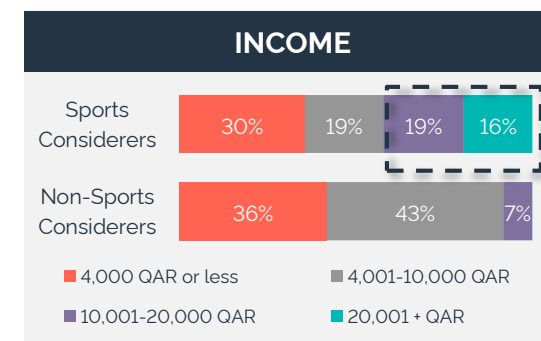
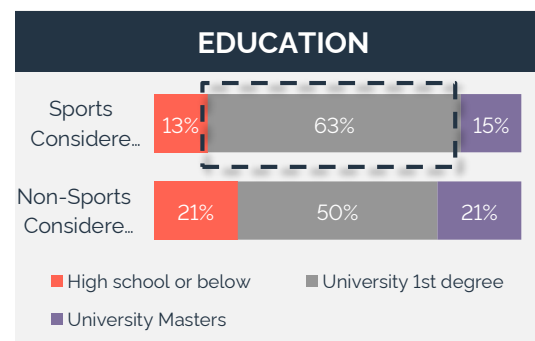
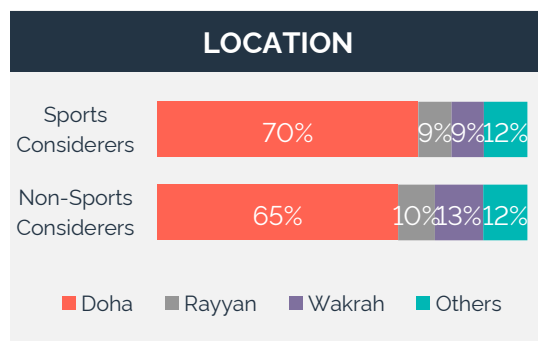
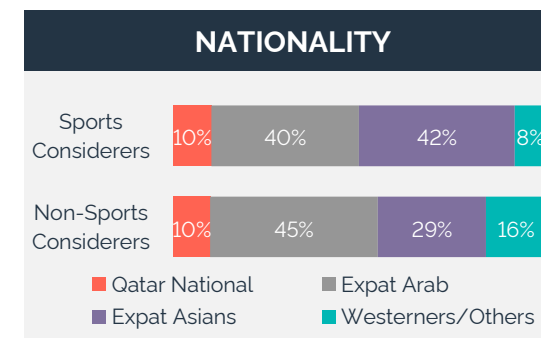
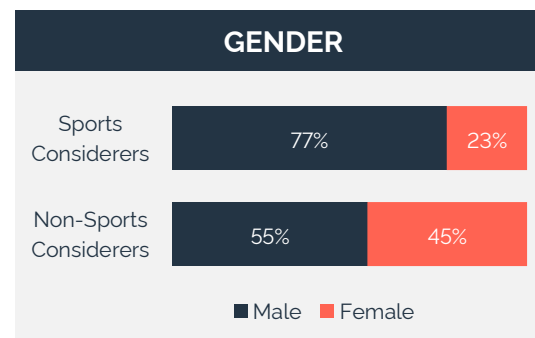
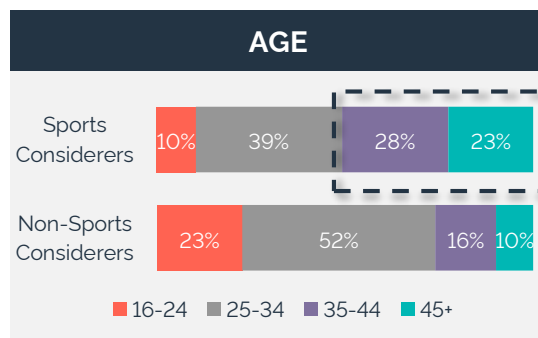
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# Sports Considerers

The average person who would consider attending a major sports event tends to be an older male with a university degree and higher income, while younger (18-34), lower income consumers are less likely to consider attending large events.



## Demographic Profile



Source: Partner Panel

Sample Size: Considerer- 687  
Non-Considerer- 55

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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

## QATAR

## CASE STUDY · QATAR GREEN BUILDING COUNCIL

## – Sustainability at Events

As a result of the increased call for sustainability, **Qatar Green Building Council** launched initiatives to raise awareness around the issue at events

## Qatar Green Building Council

QGBC's vision is to provide guidelines for Qatar based venues and events when adopting environmentally sustainable features within a buildings design and development.

> The QGBC recently launched the "Eco-Event Award" which aims to build a culture of sustainability within the events industry

- 1) **Drive carbon footprint reduction;** to rethink material and operations based on conservation and efficiency principles.
- 2) **Instigate green procurement and a circular economy network.** Building understanding and consideration of products' life cycles and a green supply chain by responsible sourcing.
- 3) **Awareness and education.** The Eco-Event Award showcases sustainability at all stages of an event lifecycle. From planning, operations and training staff to advising guests how to incorporate sustainable practices in their everyday life.

## QGBC's recently launched "Eco-Event Award"










Source: qatargbc.org. 2020

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# Example: Consumer Journey

The goal for sustainability at events and sports venues is to implement initiatives at every stage of the consumers journey, thereby maximizing 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
<b>SUSTAINABILITY INITIATIVES</b>	<ul style="list-style-type: none"> <li>&gt; Digital source</li> <li>&gt; Recyclable newspapers</li> <li>&gt; No pamphlets</li> <li>&gt; Solar powered billboards</li> </ul>	<ul style="list-style-type: none"> <li>• Digital payments</li> <li>• Digital tickets</li> </ul>	<ul style="list-style-type: none"> <li>• Public buses</li> <li>• Metro</li> <li>• Carpooling</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic ticket scanning machines</li> <li>• Electric powered transportation within venues (e.g.. Golf buggies)</li> <li>• Disabled friendly access</li> </ul>	<ul style="list-style-type: none"> <li>• Locally sourced food</li> <li>• More vegetarian/vegan options</li> <li>• No single use plastic cutlery</li> <li>• Paper bags instead of plastic ones</li> <li>• Reusable bottles</li> <li>• Cutlery made of recyclable materials</li> </ul>	<ul style="list-style-type: none"> <li>• Recycling stations</li> <li>• Reverse Vending Machines (RVMs)</li> <li>• Waste segregation bins</li> </ul>	<ul style="list-style-type: none"> <li>• Water saving sanitary-ware in toilets</li> <li>• Air hand dryer in toilet instead of paper</li> <li>• Motion sensor taps and lights</li> <li>• Designated outdoor smoking areas</li> </ul>

Source: Desk Research

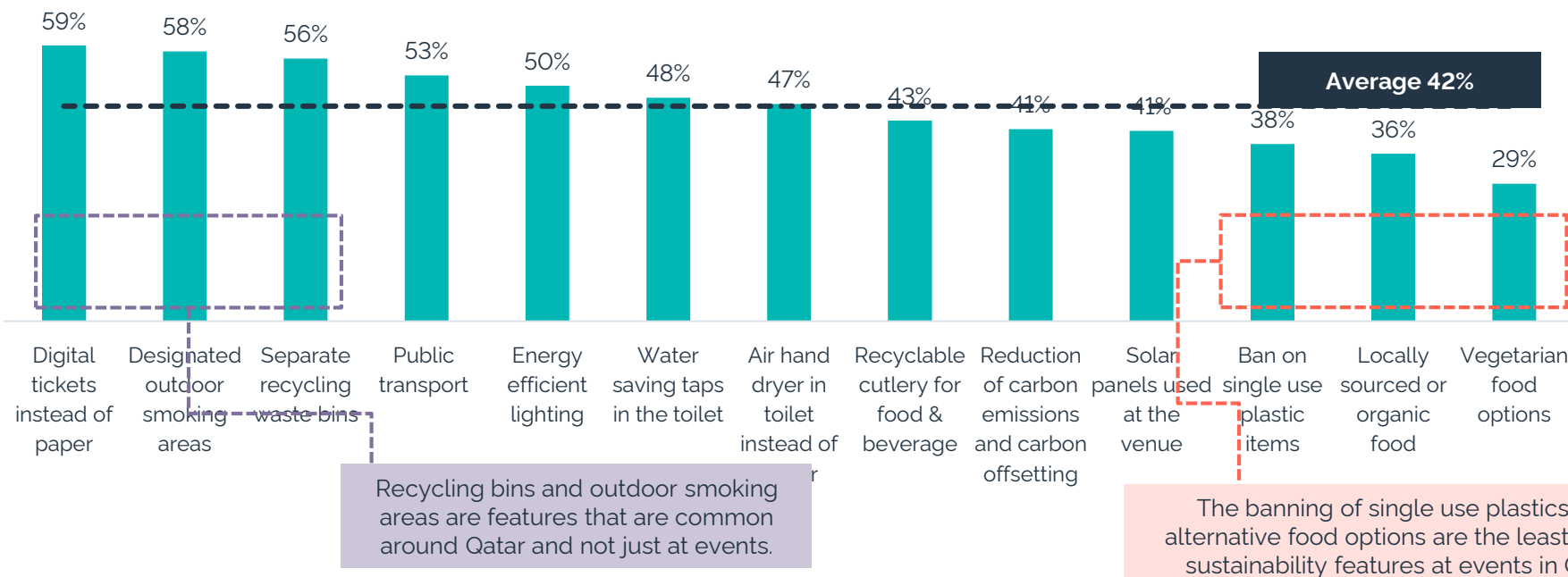
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# Awareness of Sustainability

Awareness of basic sustainability initiatives at events is good in Qatar. With digital ticketing, outdoor smoking and separate recycling facilities being the most salient among consumers, some less known features can however, be communicated better.

## AWARENESS OF SUSTAINABILITY MEASURES 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 try to use renewable energy resources in everything, instead of nonrenewable energy resources. Let us take the air-conditioning in Khalifa Stadium, how much energy does it consume? They use electricity, but what if they used petroleum. It would consume a lot of petroleum. It would be better if they used electricity generated from the wind or water."

*Sports Ministry*

Source: Partner Panel

Sample Size – 742



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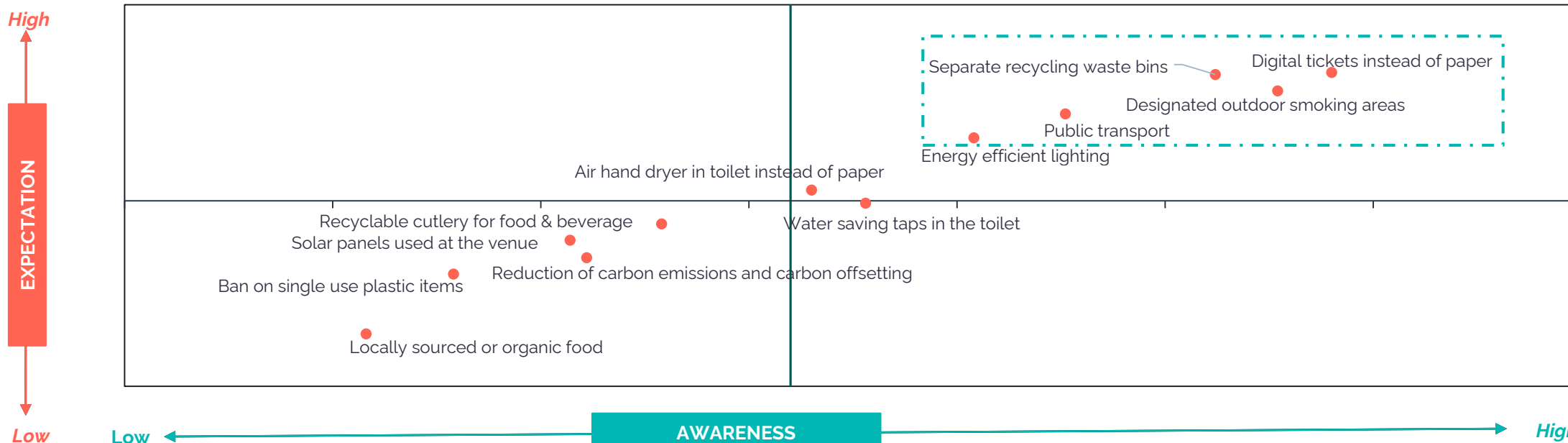
# Awareness vs Expectations

'Digital tickets', 'designated outdoor smoking zones', 'public transport' and 'waste sorting bins' are the sustainability practices people are most familiar with and expect at events.

## SUSTAINABILITY MEASURES 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: Partner Panel

Sample Size – 742



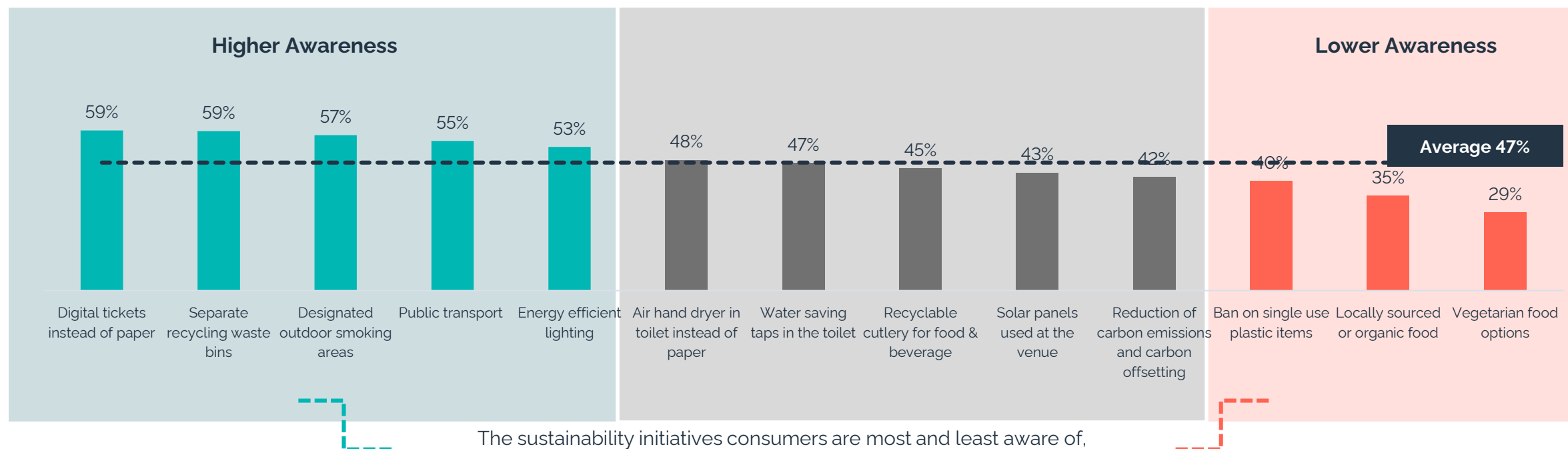
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# Sustainability Measures Expected at Events

The most common sustainability facilities, like ticketing, recycling and designated smoking areas are the most expected, while less understood initiatives have seemingly little impact.

## SUSTAINABILITY MEASURES EXPECTED AT EVENTS – GENERAL POPULATION

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



Source: Partner Panel

Sample Size – 742

QATAR

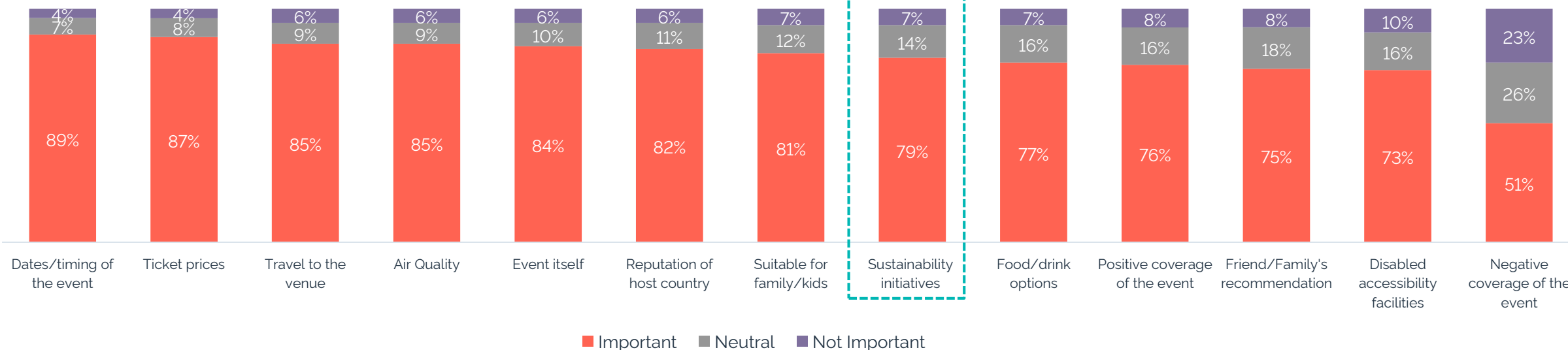
# Factors Important While Deciding to Attend Events

Although most Qatar consumers are aware of sustainability initiatives, their impact on a consumer's decision on whether to attend an event is middling.

## 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 lower priority than financial and logistical factors like price, timings, travel, reputation and appropriateness for kids.



Source: Partner Panel

Sample Size – 742

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# Impact Decision Making

Well known initiatives like digital ticketing and recycling facilities, as well as those that people find important like public transport and energy saving lighting, do have a positive impact on their decision to attend an event.

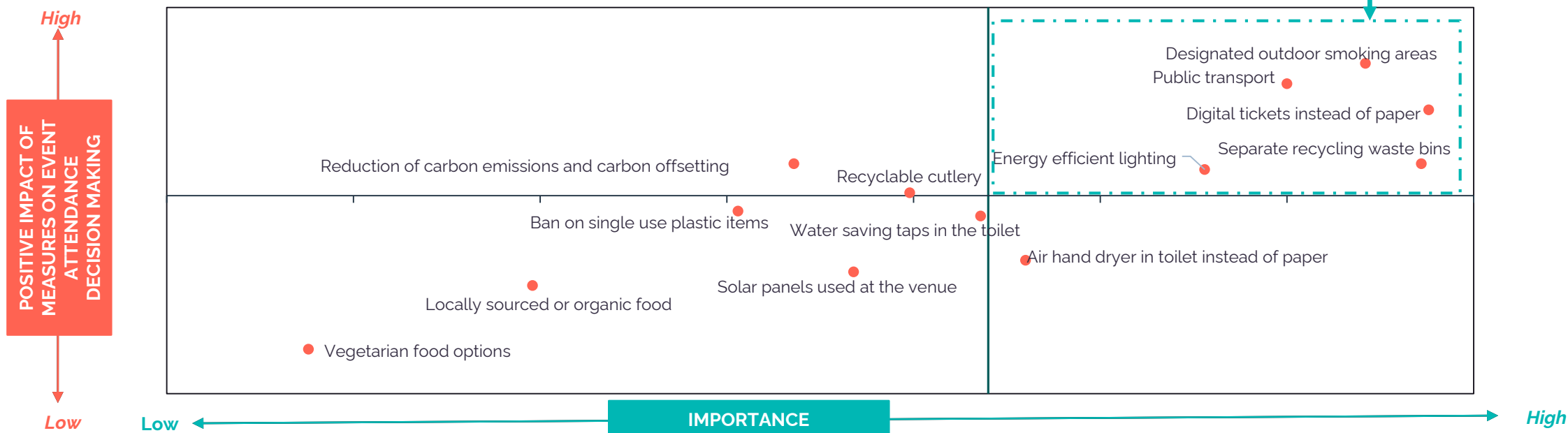
"When everything is organised in the right way and follow the quality control standards, the fans will like to visit the events more. Let's say you have a stadium in a poor country that will not follow these standards you will not see there are a lot of fans and in the contrary when you have a stadium that have the latest standards and technologies fans will visit more."

*Sports Industry*

## 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: Partner Panel

Sample Size – 742

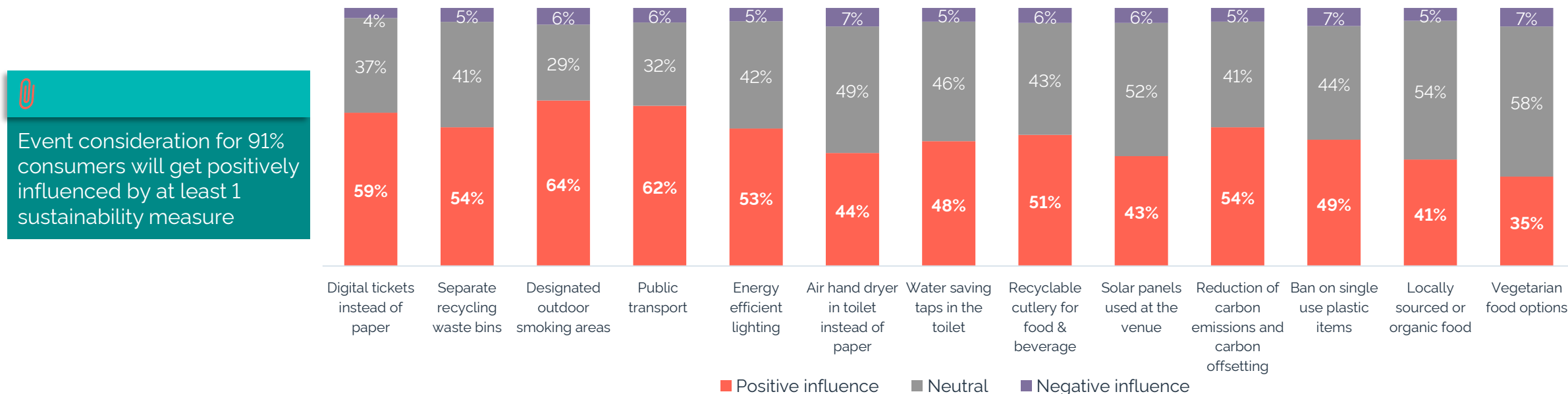
QATAR

# Adoption of Sustainability Measures at Events

Event consideration for 9 in 10 people gets positively influenced by at least one sustainability measure. 'Designated smoking areas' and 'public transport' are the most influential factors.

## ADOPTION OF SUSTAINABILITY MEASURES AT EVENTS – GENERAL POPULATION

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



Source: Partner Panel

Sample Size – 742

QATAR

# Easily vs Tougher to Implement

Familiar sustainability features are the most likely to be implemented easily but that compliance and awareness are challenges.

## EASILY IMPLEMENTED SUSTAINABILITY INITIATIVES



### CLEARLY VISIBLE

Industry professionals in Qatar believe that most environmental sustainability initiatives at events should be easy to adapt for consumers, provided they are made mandatory with clear usage signs and directions.



### TRANSPORT

Initiatives like public transport should be adopted easily by residents and visitors alike by time the World Cup 2022 starts. Residents will have had time to adopt public transport for their daily commute which will extend to the World Cup.

## TOUGHER TO IMPLEMENT SUSTAINABILITY INITIATIVES



### COMPLIANCE

Any new initiative that is introduced, particularly those that may be harder to understand may meet with resistance – either from companies themselves, or consumers. There is a perception amongst industry professionals that compliance in Qatar is low.



### AWARENESS

Industry professionals believe that awareness around sustainability amongst the general population is currently the biggest challenge. Our research suggests otherwise, which suggests there may either be more of an issue with compliance or that a large number of the expat community are not online?

Source: YouGov Sport Interviews with Sports/Events/Tourism Executives in Qatar

QATAR

# Sustainability and the FIFA World Cup 2022

4

QATAR • SUSTAINABILITY AND THE FIFA WORLD CUP 2022

# Section Summary



Infrastructure, stadiums and environmental sustainability initiatives are the most well known aspects of the FIFA World Cup 2022 more so among those who consider attending FIFA World Cup 2022

Environmental sustainability initiatives are the third most well known aspect of the FIFA World Cup 2022 that people are aware of

Digital ticketing is the most expected sustainability initiative among those who consider attending FIFA World Cup 2022, slightly ahead of waste sorting bins and designated outdoor smoking areas

PR about sustainability initiatives at the tournament can potentially help change consideration of 8 in 10 Qatar residents who are currently not considering attending the FIFA World Cup 2022

Digital tickets, recyclable items and reducing carbon emissions are the factors that will have the most positive impact on people's consideration of FIFA World Cup 2022

Communication of 'vegetarian food options' and 'air hand dryers' could be avoided as they would have a negative impact on people's consideration of FIFA World Cup 2022

QATAR

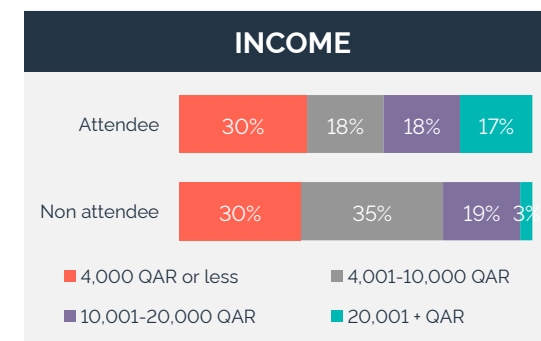
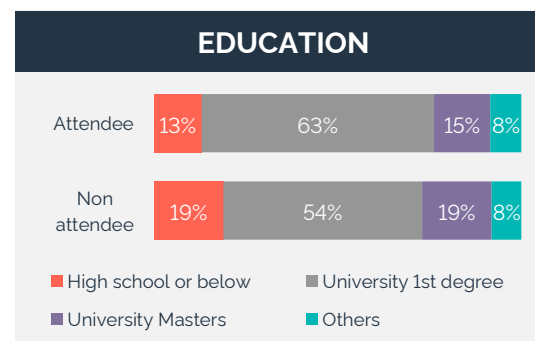
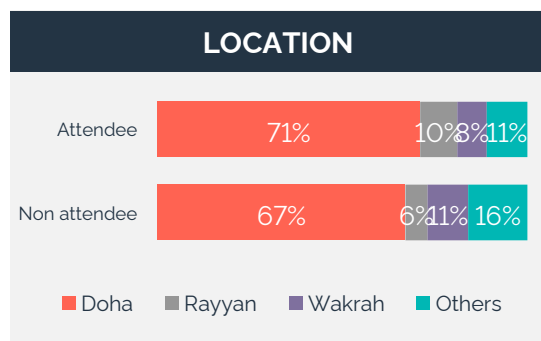
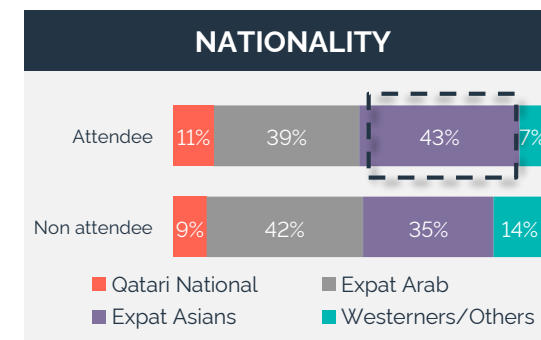
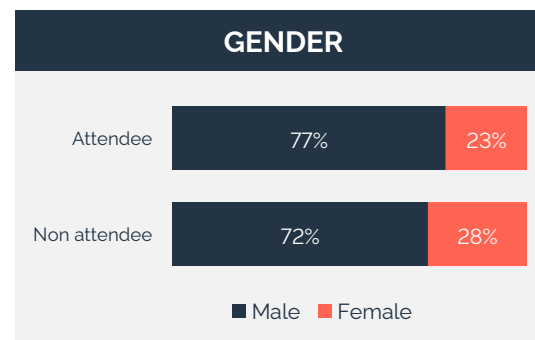
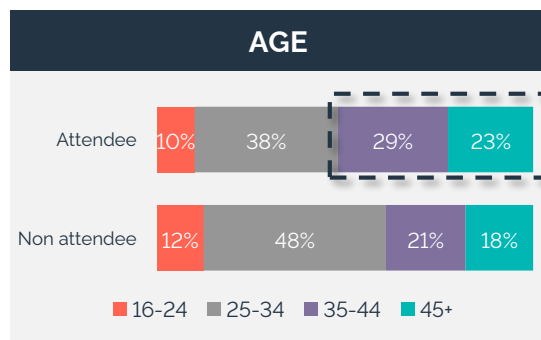
# FIFA World Cup 2022 Considerers

Consumers who are considering attending the FIFA World Cup in 2022 are more likely to be mature, educated and higher earners, while those who are not considering attending, tend to be younger (<35), with lower income and education



## Demographic Profile

### Those Considering Attending FIFA World Cup 2022



Source: Partner Panel

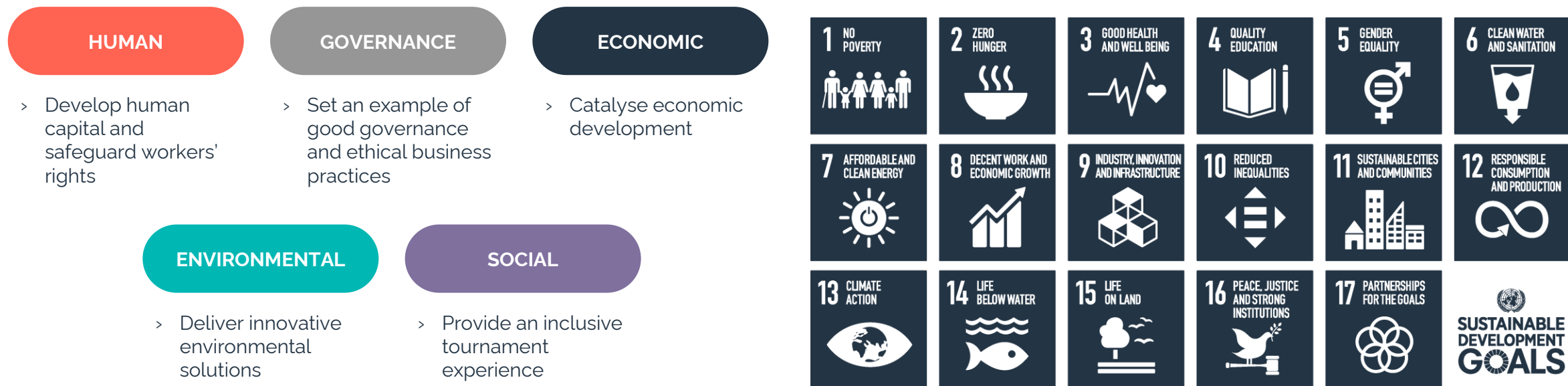
Sample Size: Considerer- 581  
Non-Considerer - 161



QATAR

# FIFA World Cup 2022 Sustainability Strategy

The FIFA World Cup 2022 sustainability strategy was 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

## QATAR

# Sustainability at the FIFA World Cup 2022

FIFA and the Qatar Supreme Committee (SC) have made considerable progress in terms of achieving the 5 sustainability strategy pillars set for the 2022 Qatar World Cup.

## KEY HIGHLIGHTS OF THE PROGRESS MADE AS OF 2020

### HUMAN

- > Continued implementation of the SC programme to monitor compliance with its Workers' Welfare Standards across all sites.
- > SC's recruitment fees reimbursement scheme benefitted more than 34,000 workers across sites.

### GOVERNANCE

- > Human rights and safety training was provided to over 2,000 police officers by Qatar's Ministry of Interior in coordination with the SC's security team

### ECONOMIC

- > Al Janoub Stadium, one of the venues for the tournament became fully operational, achieved its targeted sustainable building certification and exceeded its targeted sustainable construction management certification.

### ENVIRONMENTAL

- > The majority of the Doha Metro network became fully operational,
- > The first voluntary carbon-offsetting programme was established in the region.
- > The FIFA World Cup headquarters in Doha became the first office tower in Qatar to receive sustainable building certification for operations.

### SOCIAL

- > An assessment of the tournament experience for disabled people at the FIFA Club World Cup Qatar 2019™ was carried out and improvements were implemented.
- > Over 900 people participated in the tailor-made online open course on Sustainability & Major Sport Events.
- > FIFA's Anti-Discrimination Monitoring System was implemented at all 168 qualifying matches played in 2019.

Source: FIFA.com

QATAR

# Sustainability at the FIFA World Cup 2022

The FIFA World Cup 2022 has plans to include several consumer facing sustainability initiatives across various phases of the event journey.

## CONSUMER FACING SUSTAINABILITY INITIATIVES

**Q:** Now imagine you were in Qatar to attend a major sports event like FIFA World Cup 2022. If you had a choice of purchasing a reusable collector's cup for beverages at QAR 10 at the event instead of using disposable cups, then which of these below options would you choose?

### PRE-EVENT

- > Digital ticketing reduces paper consumption
- > All stadiums are connected via public transport
- > Extensive network of pedestrian and bicycle pathways with bicycle racks
- > Shaded pathways connect buildings and car parks, helping to further encourage walking

### AT STADIUMS

- > Recycling bins inside all stadiums and around the complex
- > Energy efficient lighting at stadiums
- > Water saving sanitary ware across all stadiums
- > Reduction of single use plastics usage to serve food & beverage – **73% consumers willing to pay for a reusable collector's cup** instead of using disposable ones

### POST-TOURNAMENT

- > Retractable roofs and air cooling systems ensure that the venues can be used across the year and don't become obsolete during summers
- > Green spaces around the stadiums can be used as recreational spaces
- > Public transport measures like the Doha metro will reduce dependence on automobiles thus reducing pollution and traffic

Source: FIFA World Cup Sustainable stadiums document, YouGov Panel

## QATAR

# PR & Communications

FIFA have implemented a communication sustainability strategy across multiple channels to drive PR around the tournament's sustainability initiatives.

The PR team at the FIFA World Cup 2022 have used the capabilities and platforms of both FIFA and the Qatar Supreme Committee to create an integrated communication plan to drive PR regarding their sustainability strategy with regular posts on websites, press and official social media handles.

"Of course it is one of the most important matters. Spreading awareness will be through training and social media. Anything we could offer people for them to learn about sustainability is very important...we need to spread awareness to preserve the environment; use Alternative Energy, use public transportation... all of these are important."

*Sports Ministry*

Source: Qatar2022.qa, goal.com and social media channels

WEBSITE

PRESS

SOCIAL MEDIA

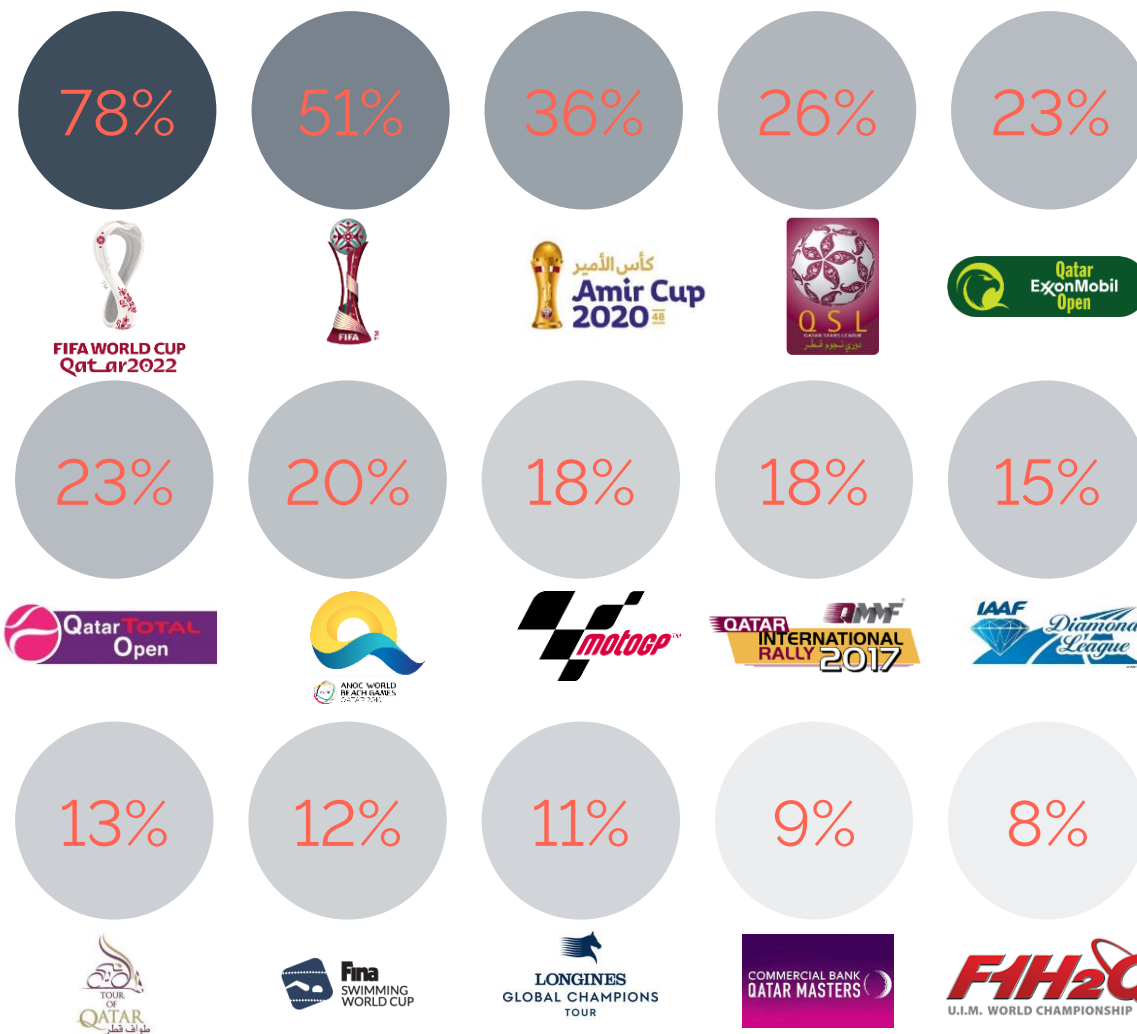


## QATAR

8 in 10 people in Qatar are considering attending the FIFA World Cup in 2022. No other event comes close to the excitement people are feeling for the World Cup in Qatar.

## CONSIDERATION OF SPORTS EVENTS HOSTED IN QATAR

**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: Partner Panel

Sample Size: 742

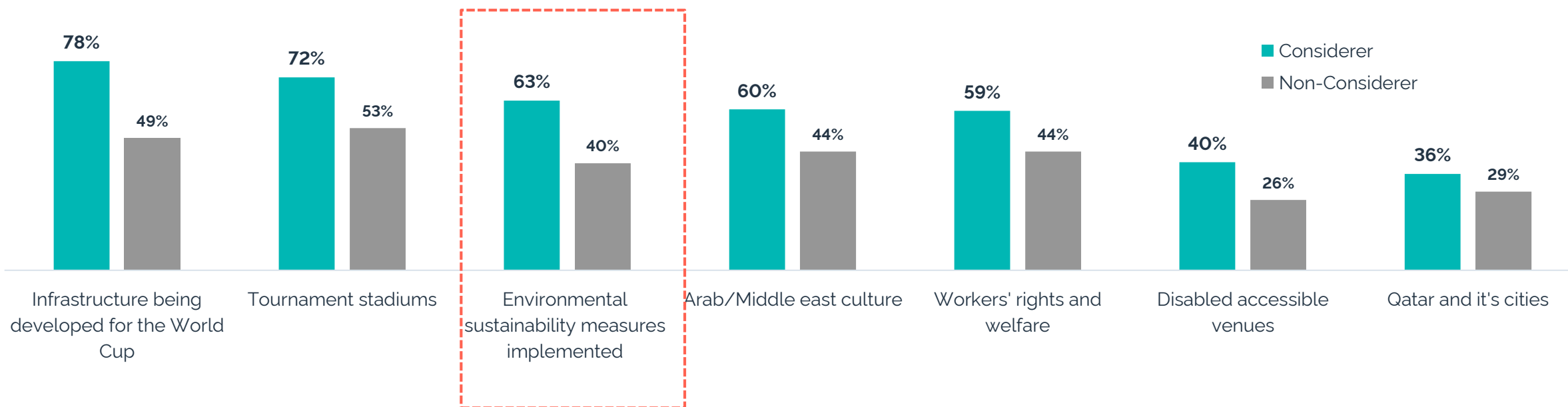
QATAR

# Awareness of Aspects About FIFA World Cup 2022

Currently, awareness of environmental sustainability at the 2022 World Cup is solid among consumers; behind only infrastructure and stadiums

## AWARENESS OF ASPECTS ABOUT FIFA WORLD CUP 2022

**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: Partner Panel

Sample Size: Considerers – 581,  
Non-considerer – 161



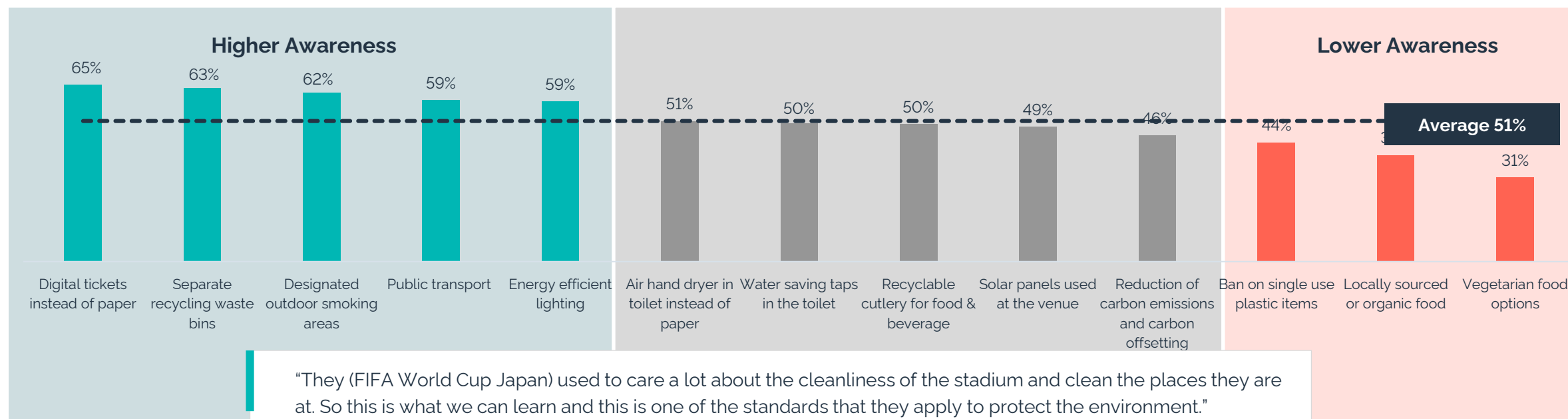
QATAR

# Sustainability Initiatives Expected at FIFA World Cup 2022

Digital ticketing is the most expected sustainability measure among those who consider attending FIFA World Cup 2022, slightly ahead of waste sorting bins and designated outdoor smoking areas.

## 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?



Sports Industry

Source: Partner Panel

Sample Size: Considerers – 581,

QATAR

# Impact of PR Around Sustainability on Event Perception

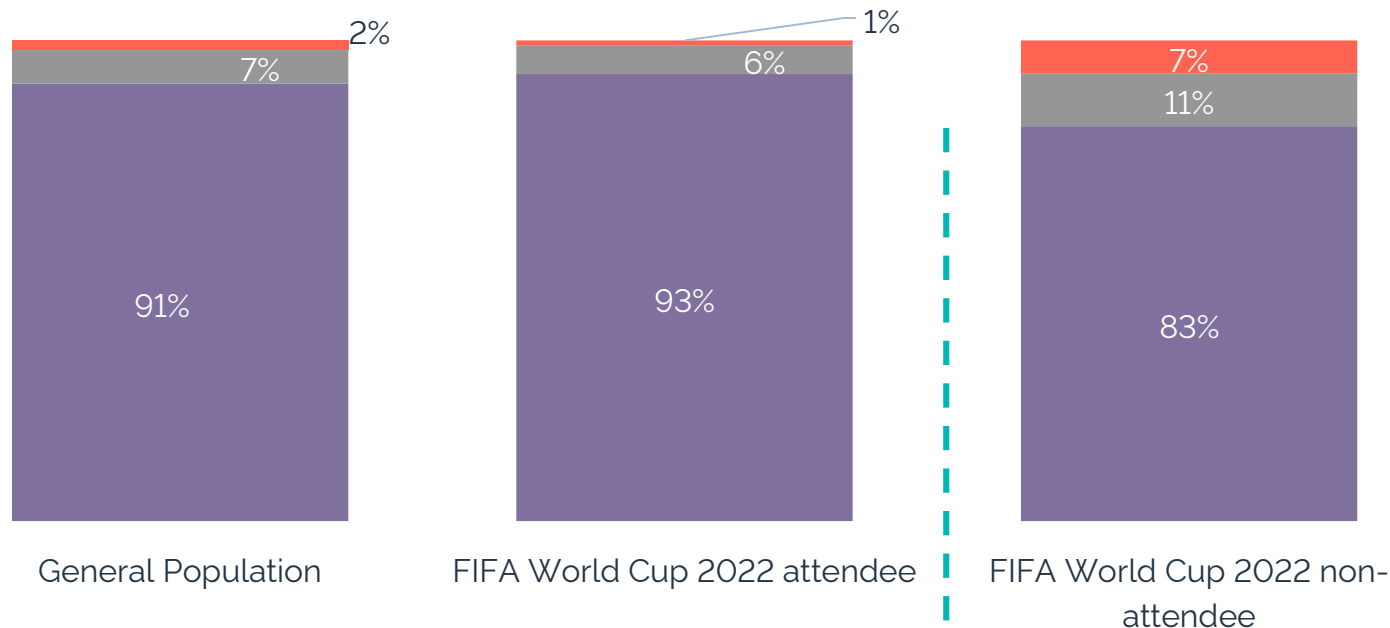
PR around sustainability initiatives at events will have a positive impact among both FIFA World Cup considerers and Non-considerers alike.

**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?

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

"Sure it will leave a positive impression. Because you are stopping a big damage on the environment, and at the same time, you are interested in the health of the audience."

*Tourism Industry*



Source: Partner Panel

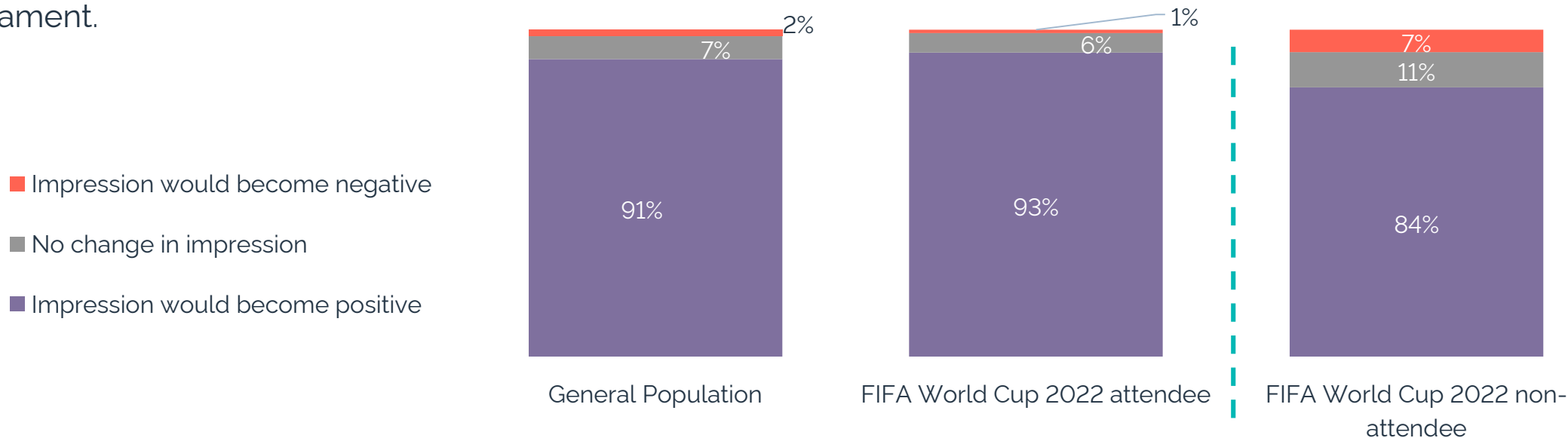
Sample Size: General population – 742  
FIFA World Cup Considerer – 581  
Non-Considerer – 161

## QATAR

# Change in Perception Due to PR on Sustainability Initiatives

8 in 10 Qatar residents who are currently not considering attending the FIFA World Cup 2022 said their impression of the event will become positive if they hear positive PR regarding sustainability initiatives implemented at the tournament.

**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?



Source: Partner Panel

Sample Size: General population – 742  
 FIFA World Cup Considerer – 581  
 Non-Considerer – 161

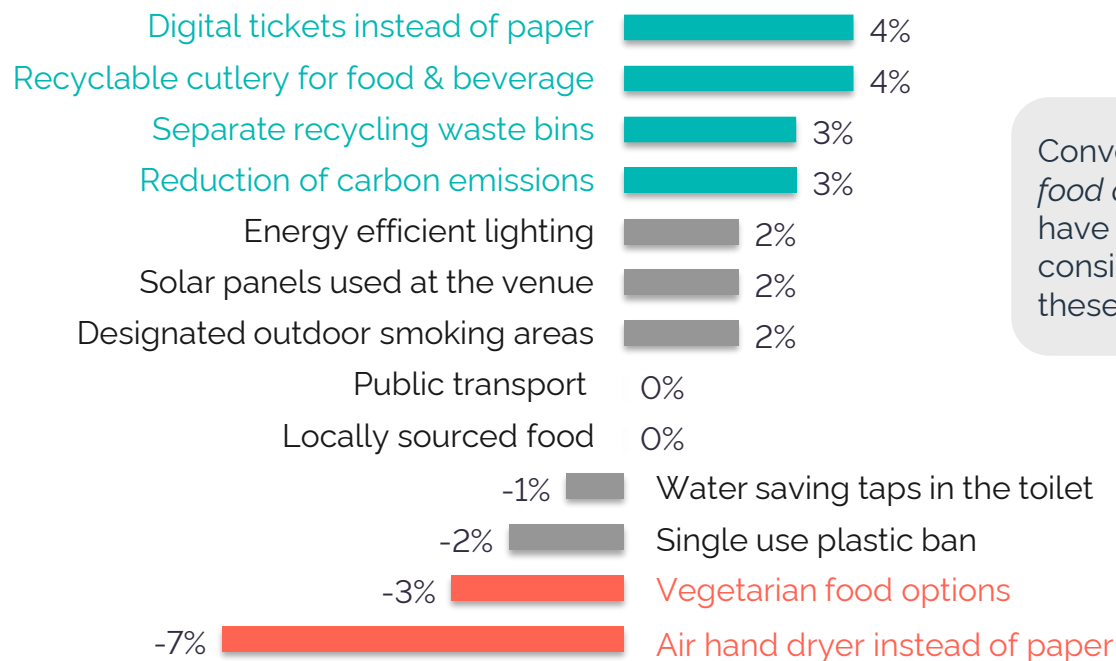
## QATAR

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

Digital tickets, recyclable items and reducing carbon emissions are the factors that will have the most positive impact on people's consideration of FIFA World Cup 2022.

'When it comes to food and beverages we should always use material that could be recycled or reconstructed and make use of them.'

*Sports Ministry*



Conversely communicating 'vegetarian food options' and 'Air hand dryers' will have a negative impact on the consideration and hence communicating these can be avoided.

■ Positive Impact  
■ Neutral Impact  
■ Negative Impact

Source: Advanced Logistic Regression Modelling

Sample Size: General population – 742

QATAR

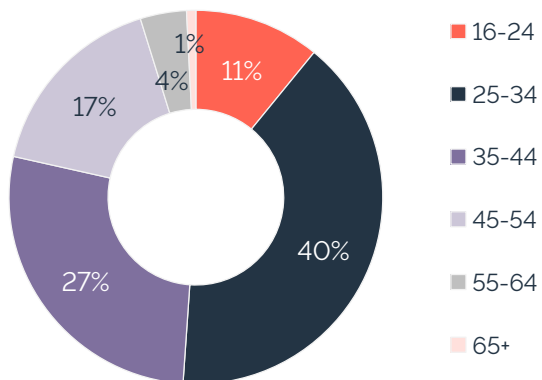
# APPENDIX



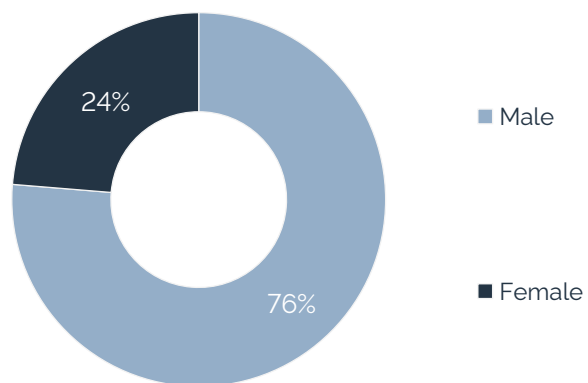
QATAR

# DEMOGRAPHIC PROFILE OF NAT REP SAMPLE IN QATAR

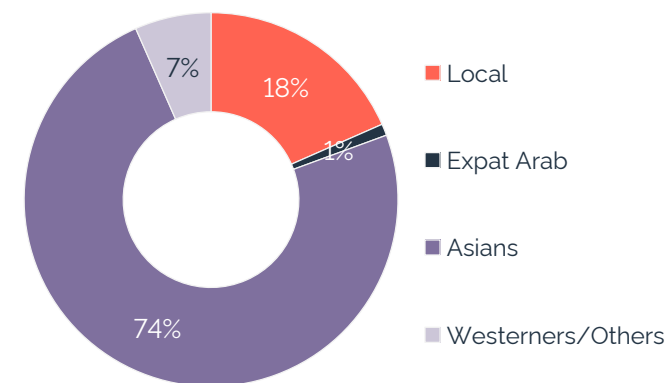
AGE



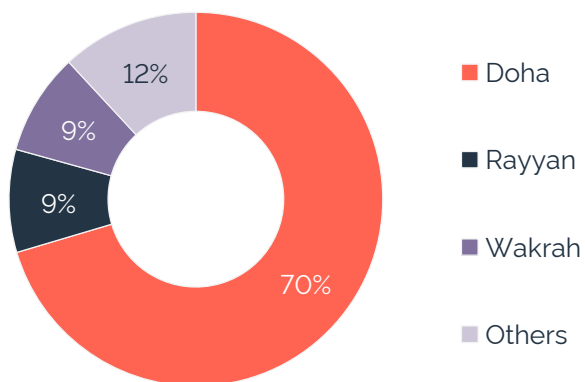
GENDER



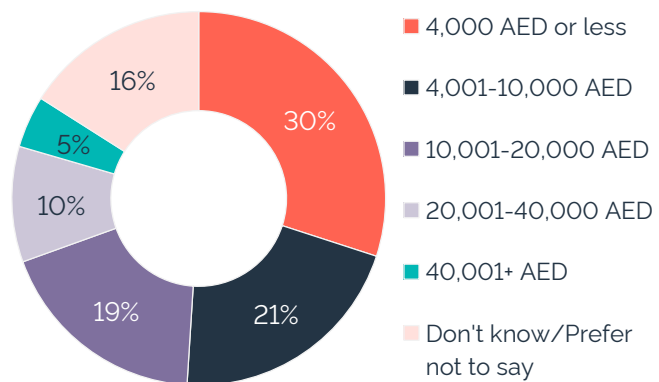
NATIONALITY



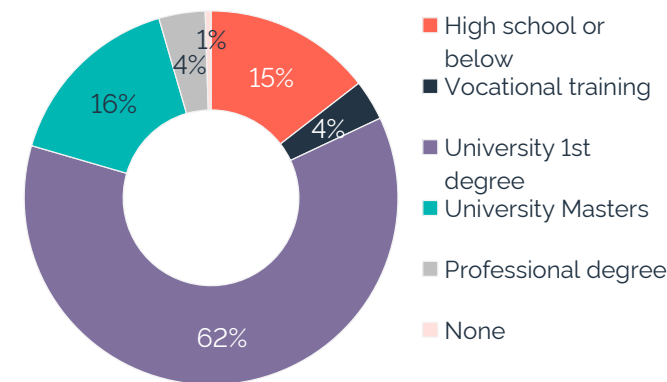
LOCATION



INCOME



EDUCATION

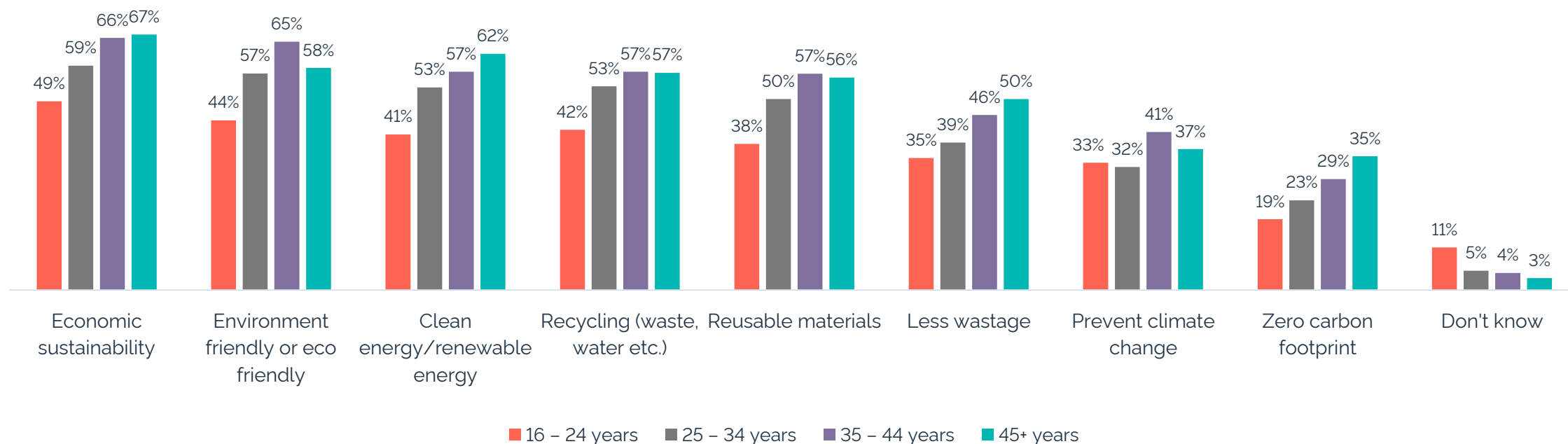


Sample Size - 742,

QATAR

Associations with sustainability is driven by 35+ year age group – significantly higher associations for 'eco-friendly', 'economic sustainability', 'reusable materials' compared to the 18-34 years age group

PROMPTED ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' IN QATAR – 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.

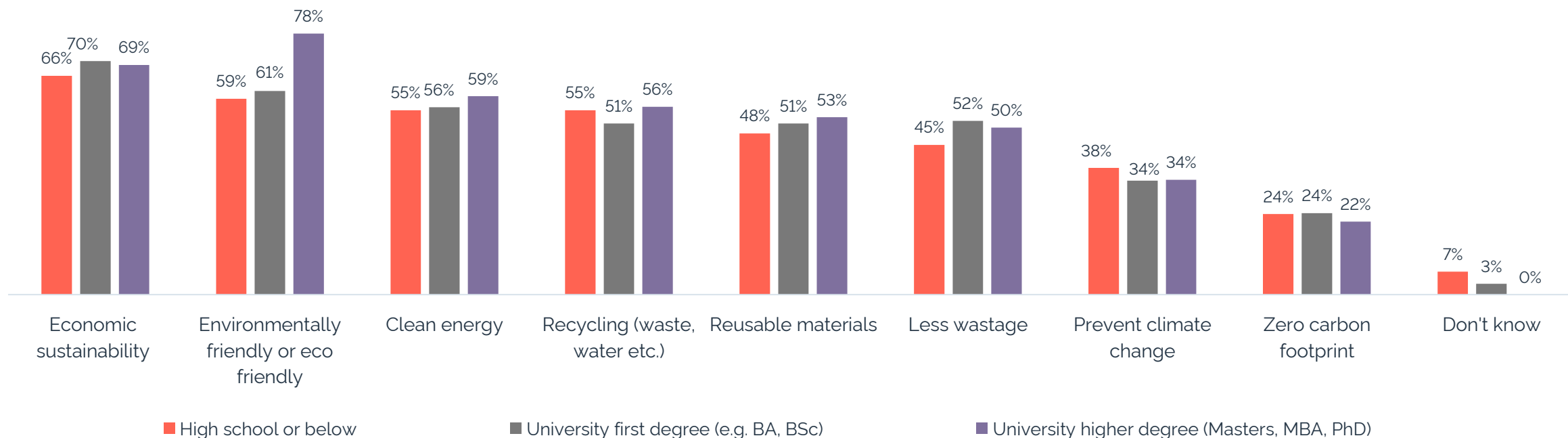
Sample Size: 16-24 years – 81, 25-34 years – 298, 35-44 years – 203, 45+ years – 160



QATAR

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

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN QATAR - BY EDUCATION LEVELS



Source: YOUNGOV PANEL

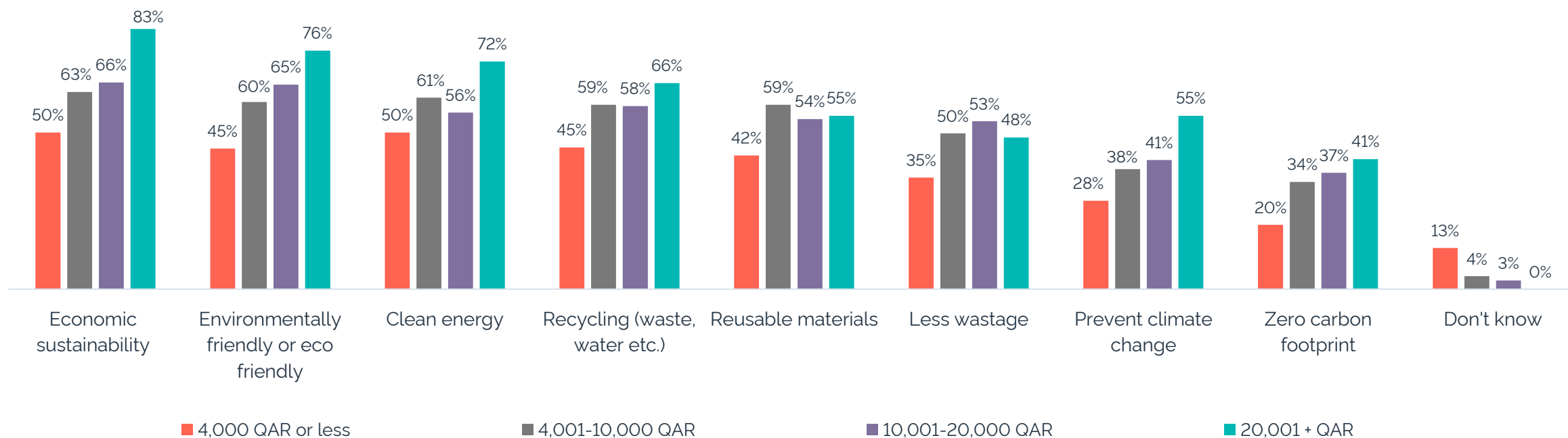
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Sample Size: High school or below – 108,  
University first degree – 456, University or higher – 119

QATAR

Middle class and higher income groups (monthly household income of 4,000 QAR+) drive more associations with sustainability. The 20,000-40,000 QAR group drive associations of waste management related associations of 'recycling', 'reusing' and 'less wastage'

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN QATAR - BY INCOME LEVELS



Source: YOUNGOV PANEL

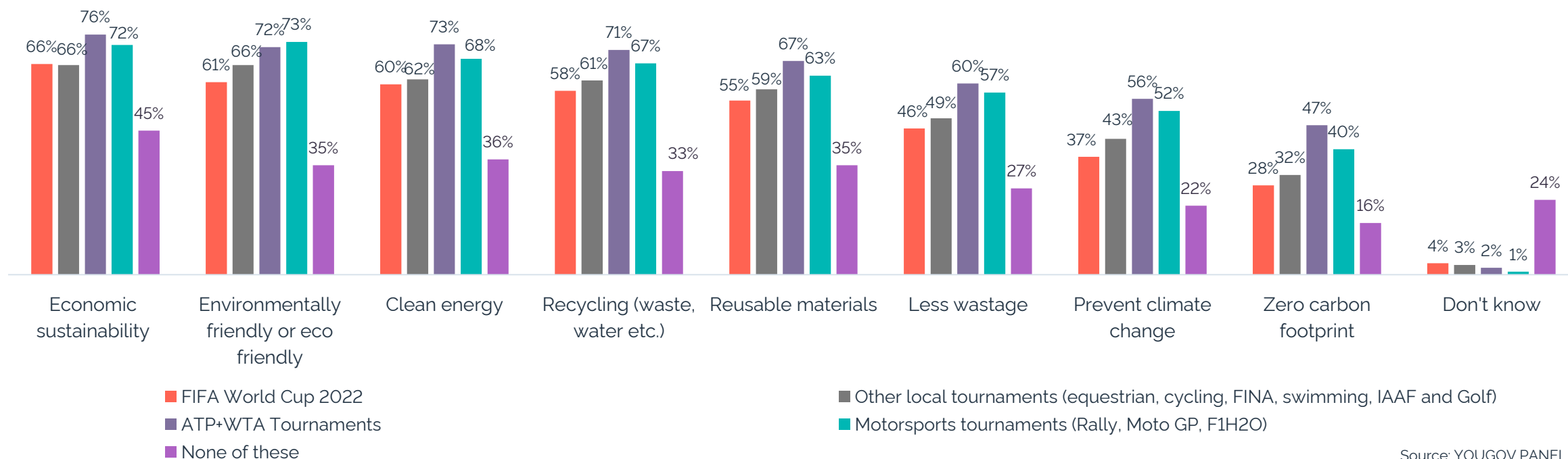
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

Associations with sustainability are significantly higher among those interested in attending sports events in Qatar vs those who aren't

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN QATAR - BY SPORTS EVENT CONSIDERED



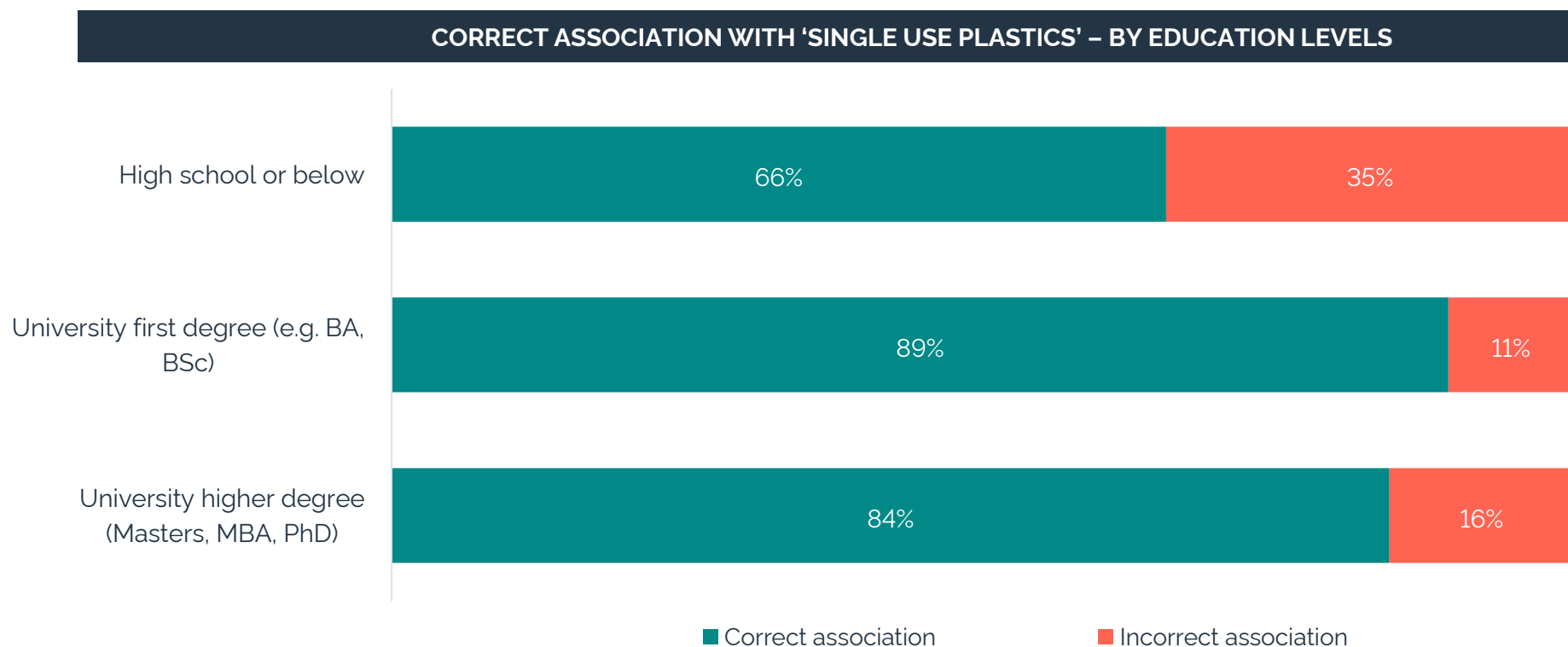
Source: YOUNGOV PANEL

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 – 581, Other Qatar events – 511, Tennis events – 227, Motorsports events – 207, No sports events – 55

QATAR

Correct associations with the term 'single use plastics' is directly proportional to the education level of the respondent. Even among those with a lower education level, 8 out of 10 people still associate correctly with the term



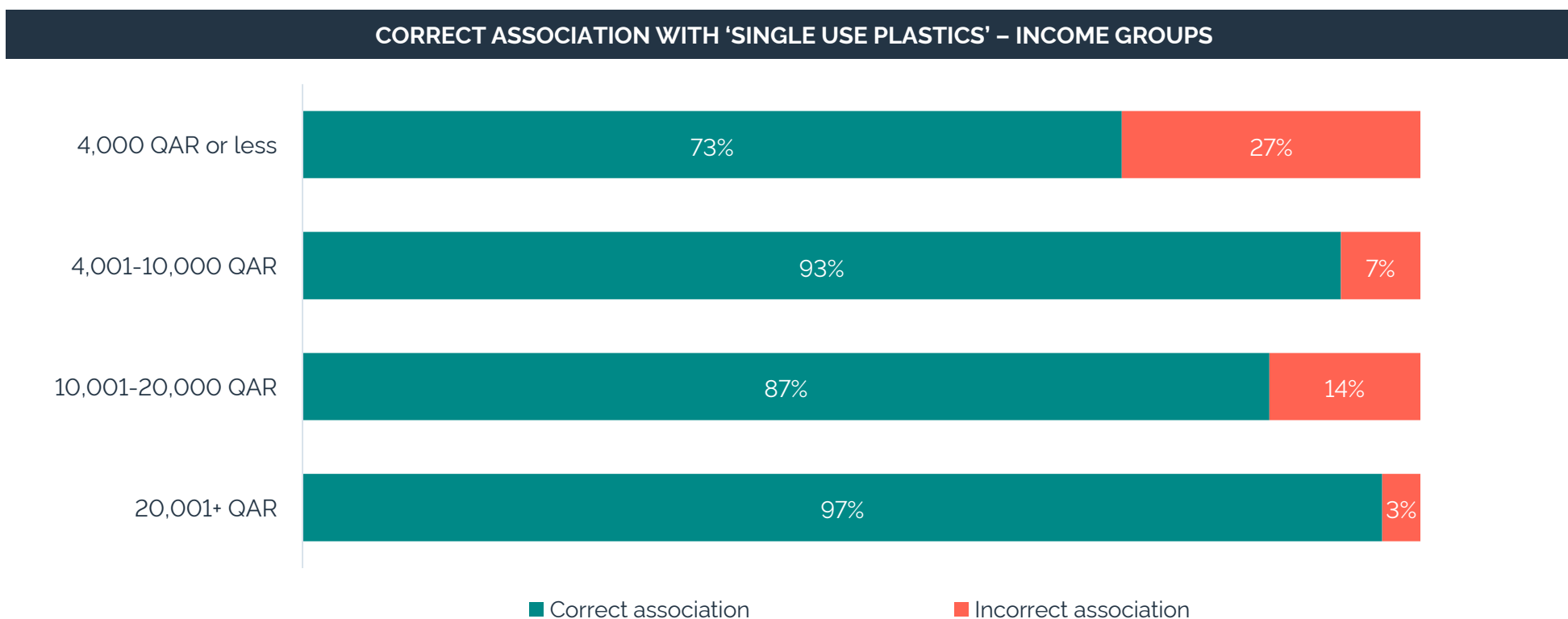
Source: YOUNGOV PANEL

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

Sample Size: High school or below – 108,  
University first degree – 456, University or higher – 119

QATAR

Similar to education levels, correct associations with 'single use plastics' is also directly proportional to income level of the respondent. However even from the lower income group, 8 out of 10 know the correct meaning of 'single use plastics'



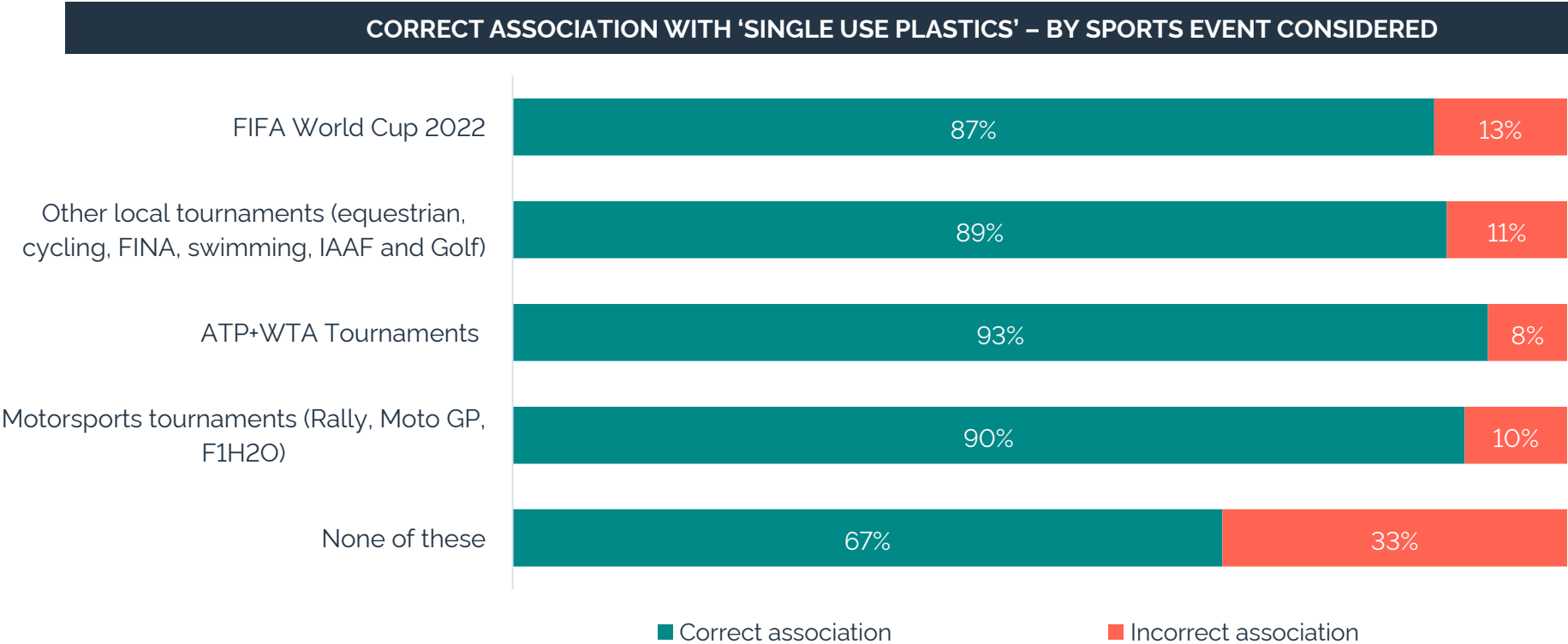
Source: YOUNGOV PANEL

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

Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

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 – Similar levels of awareness of 'single use plastics' across all sports event enthusiasts



Source: YOUNGOV PANEL

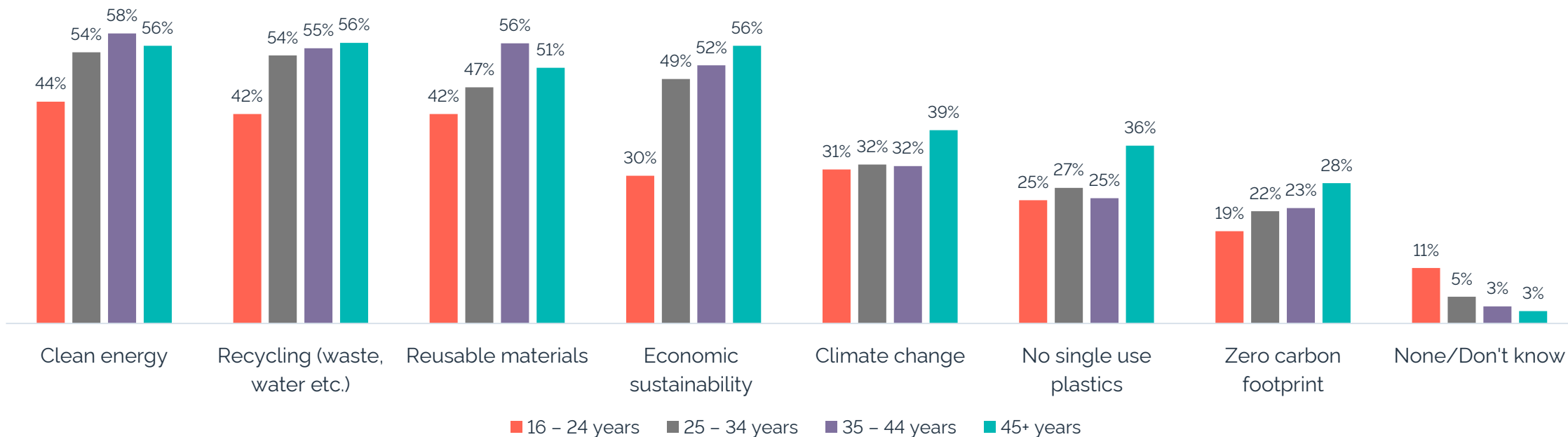
Q: Which of these statements best describes what 'single use plastics' means?

Sample Size: FIFA World Cup 2022 – 581, Other Qatar events – 511, Tennis events – 227, Motorsports events – 207, No sports events – 55

QATAR

Sustainability measures are more important for the older age group. The 45+ years age group finds recycling, clean energy, climate change, no single use plastics and zero carbon footprint much more important compared to other age groups.

SUSTAINABILITY MEASURES IMPORTANT TO PEOPLE - BY AGE GROUP



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

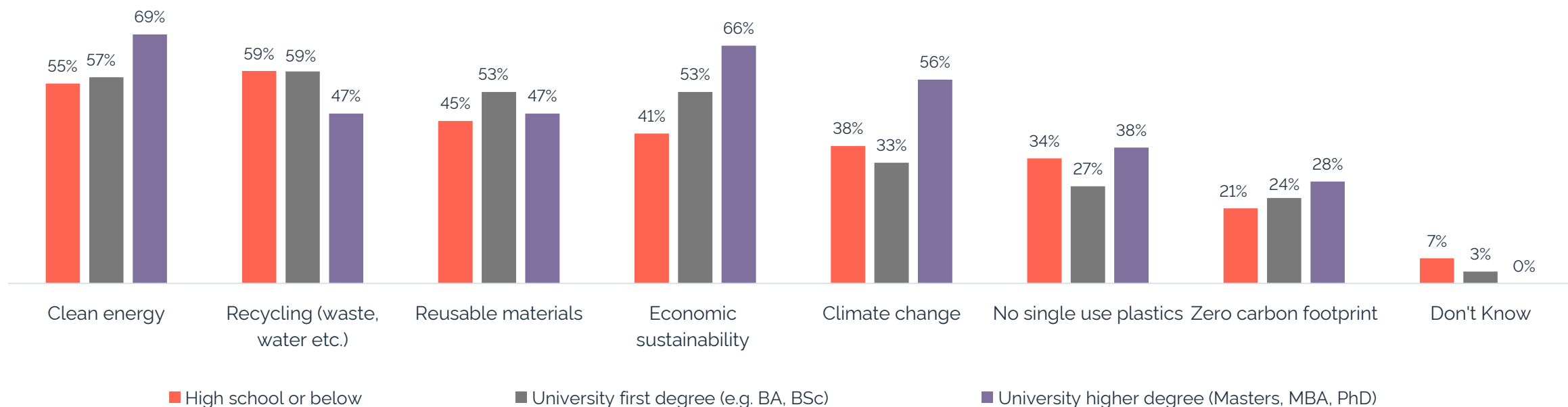
Sample Size: 16-24 years – 81, 25-34 years – 298, 35-44 years – 203, 45+ years – 160



QATAR

Environmental sustainability measures like recycling, reusing and clean energy are significantly more important in the daily life of vocational and university degree holders compared to high school or professional degree holders.

SUSTAINABILITY MEASURES IMPORTANT TO PEOPLE – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

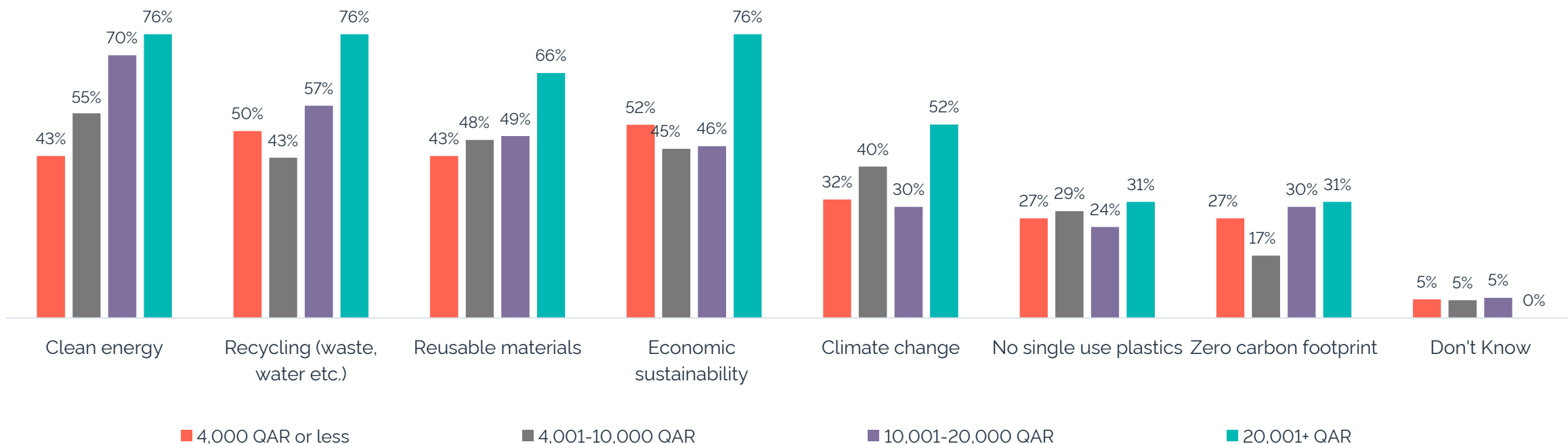
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: High school or below – 108, University first degree – 456, University or higher – 119

QATAR

Middle class and higher income groups (monthly household income of 4000 QAR+) feel that sustainability measures are more important in their daily lives compared to lower income households

SUSTAINABILITY MEASURES IMPORTANT TO PEOPLE - BY INCOME LEVELS



Source: YOUNGOV PANEL

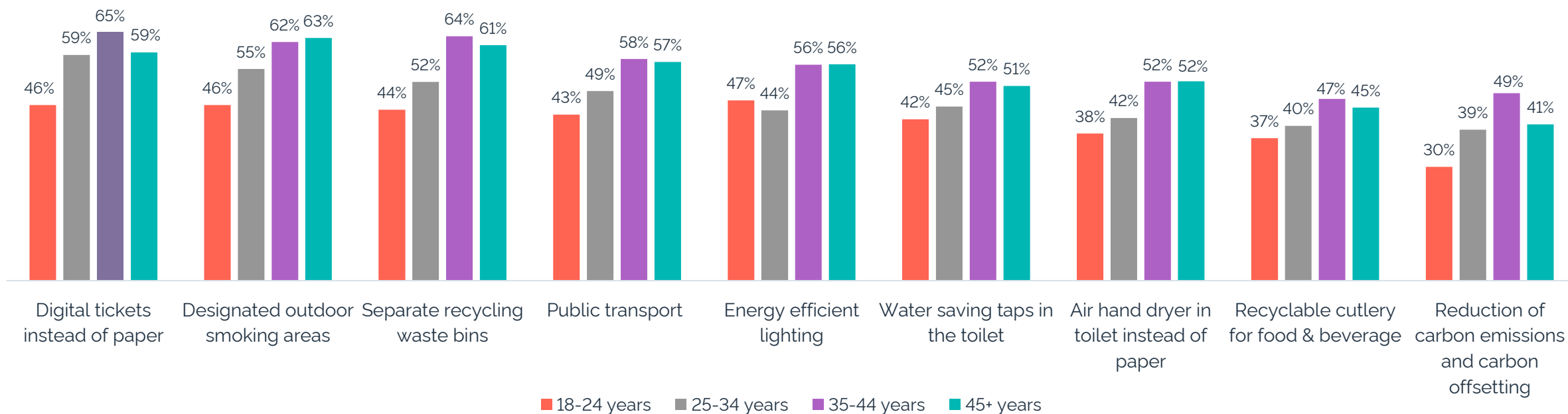
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

The awareness of most sustainability measures is higher among the older age groups 35+. The 45+ age group is the most aware with designated outdoor smoking areas, separate recycling bins and energy efficient lighting having the highest awareness among this group

AWARENESS OF SUSTAINABILITY MEASURES AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

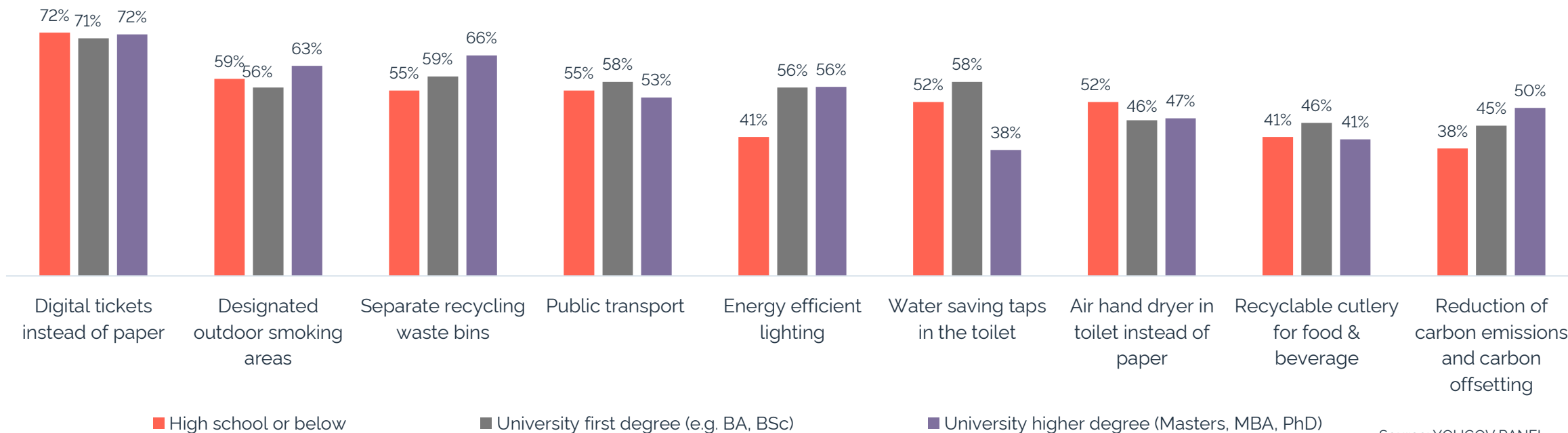
Q: Which of these environmental sustainability measures at an event/venue are you aware of either through attending events or through media sources?

Sample Size: 18-24 years – 81, 25-34 years – 298, 35-44 years – 203, 45+ years – 160

QATAR

Those with a higher education show higher awareness of sustainability measures at events. Awareness of digital tickets as a sustainability measure cuts through education levels due to it's widespread usage nowadays

AWARENESS OF SUSTAINABILITY MEASURES AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

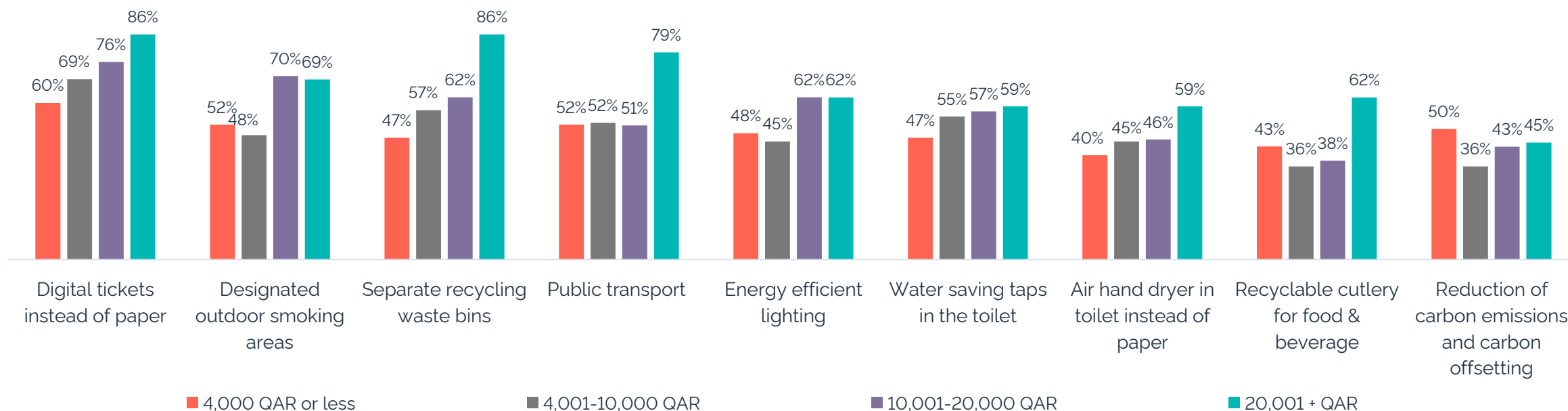
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: High school or below – 108,  
University first degree – 456, University or higher – 119

QATAR

Awareness of sustainability measures at events is higher among those with monthly household income of 4000 QAR+ possibly due to these groups being able to afford to attend more events.

AWARENESS OF SUSTAINABILITY MEASURES AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

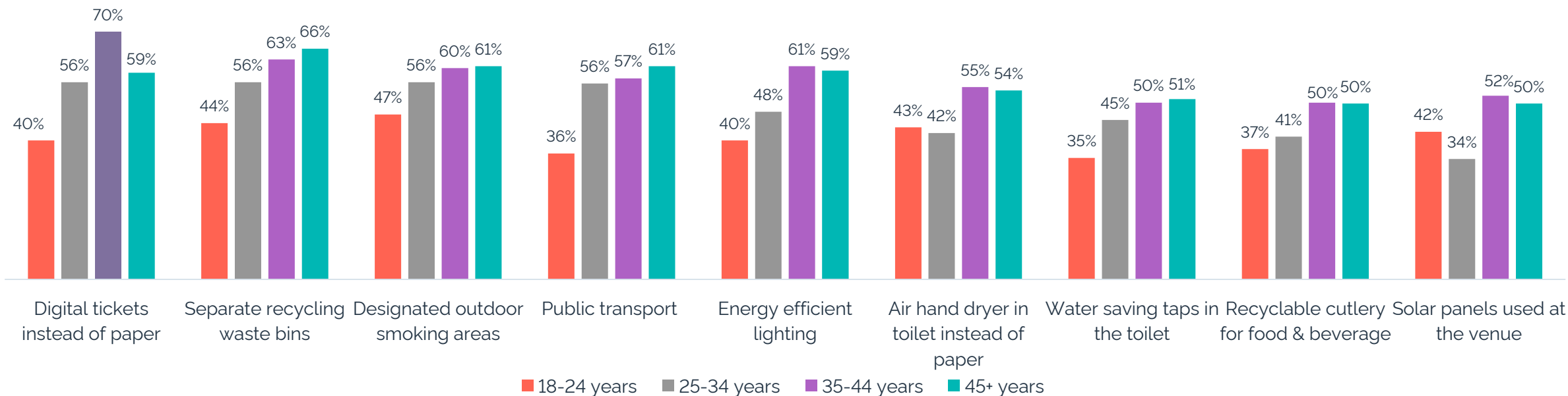
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

Waste segregation bins, digital tickets and designated outdoor smoking areas are the most important measures for the 35+ years group, whereas for the younger age group (18-24 years) energy related measures like solar panels and energy efficient lighting are more important

SUSTAINABILITY MEASURES EXPECTED AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

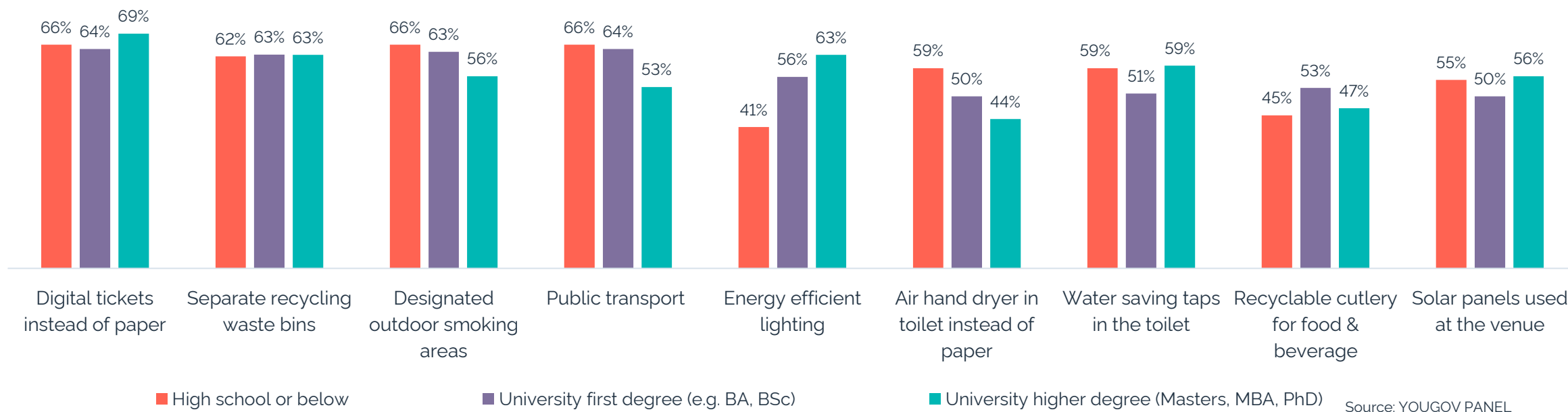
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: 16-24 years – 81, 25-34 years – 298, 35-44 years – 203, 45+ years – 160

QATAR

Those with a higher education expect more sustainability measures at events. Awareness of digital tickets as a sustainability measure cuts through education levels.

SUSTAINABILITY MEASURES EXPECTED AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

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

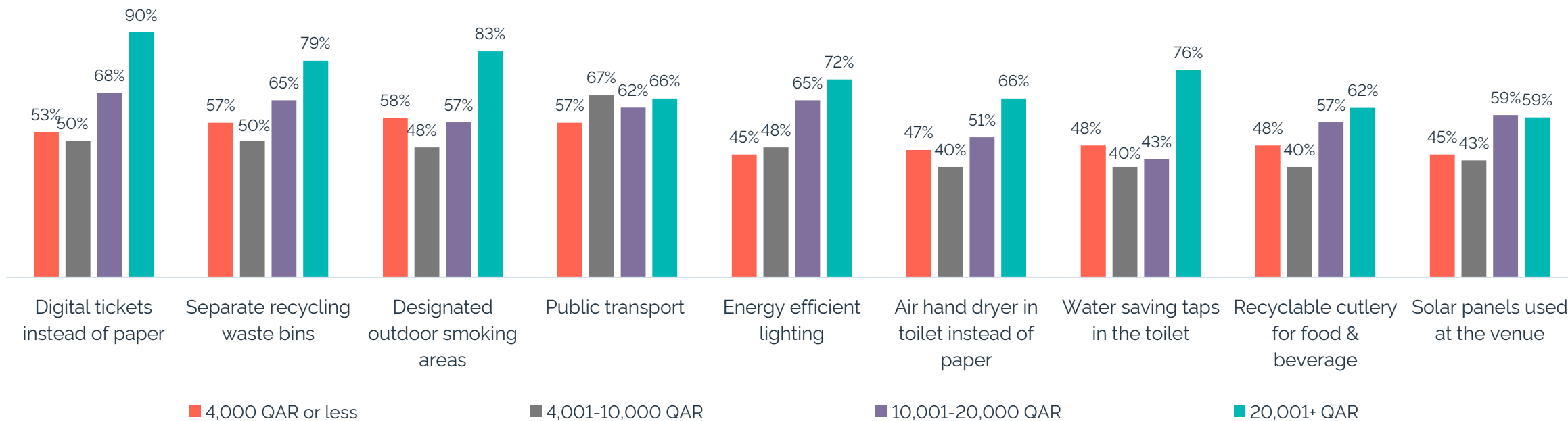
Sample Size: High school or below – 108,  
University first degree – 456, University or higher – 119



QATAR

Most of the expected sustainability measures 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 measures

SUSTAINABILITY MEASURES EXPECTED AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

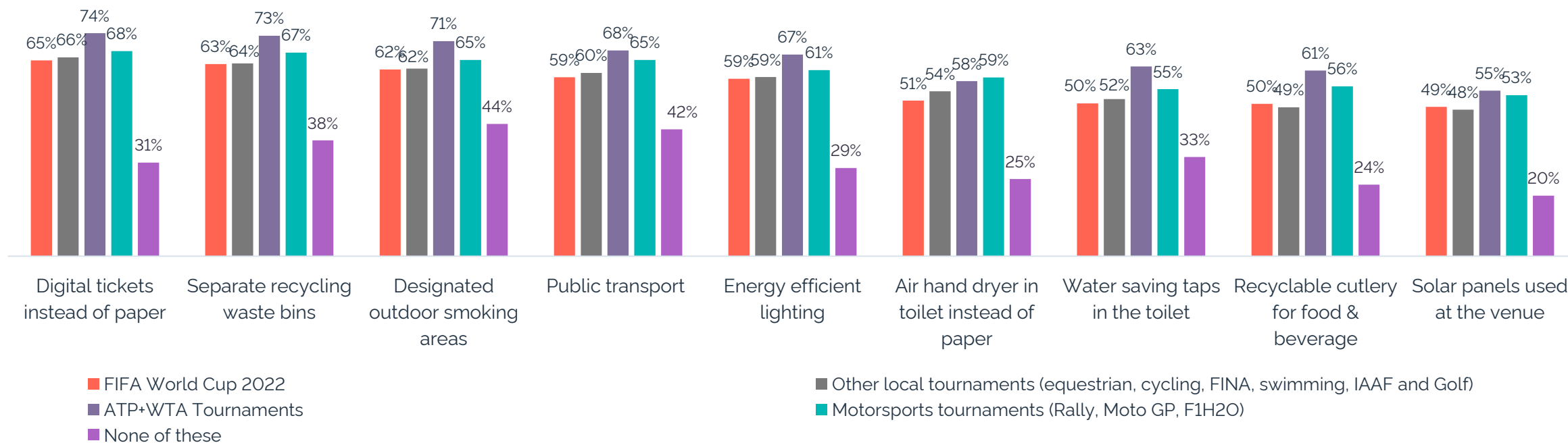
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Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

Digital tickets are the most expected sustainability measures among those who consider attending FIFA World Cup 2022, slightly ahead of waste sorting bins and designated outdoor smoking areas.

SUSTAINABILITY MEASURES EXPECTED AT EVENTS – BY SPORTS EVENT CONSIDERED



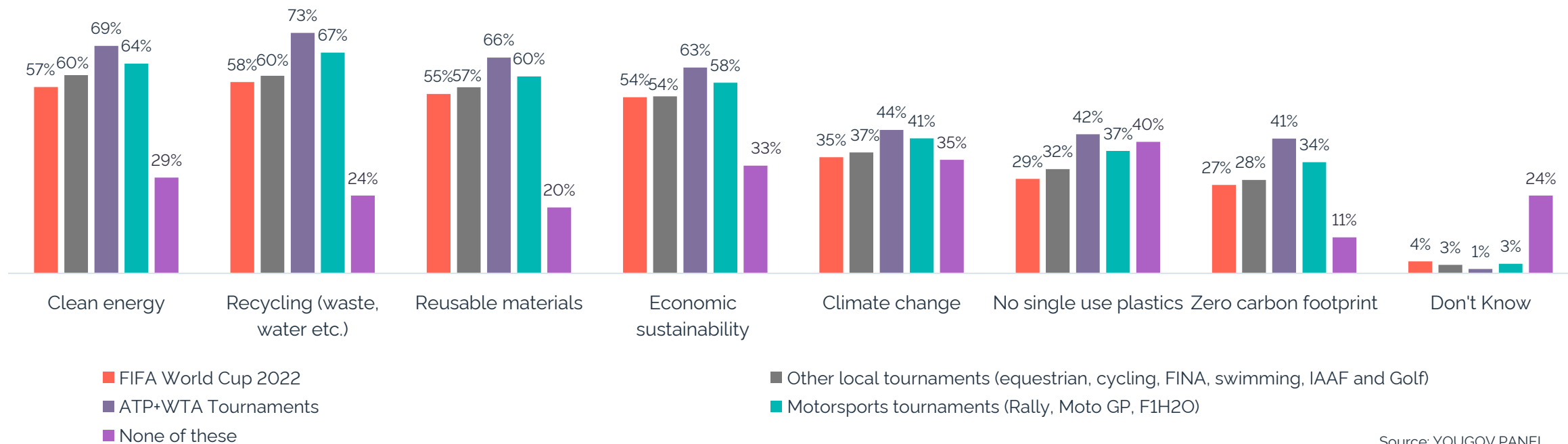
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: FIFA World Cup 2022 – 428, Other Qatar events – 288, Tennis events – 110, Motorsports events – 145, No sports events – 387

QATAR

Importance of sustainability measures is significantly higher among those interested in attending Qatar sports events including FIFA World Cup 2022 vs those who aren't

ADOPTERS OF SUSTIANBILITY MEASURES IN EVERYDAY LIFE - BY SPORTS EVENT CONSIDERED



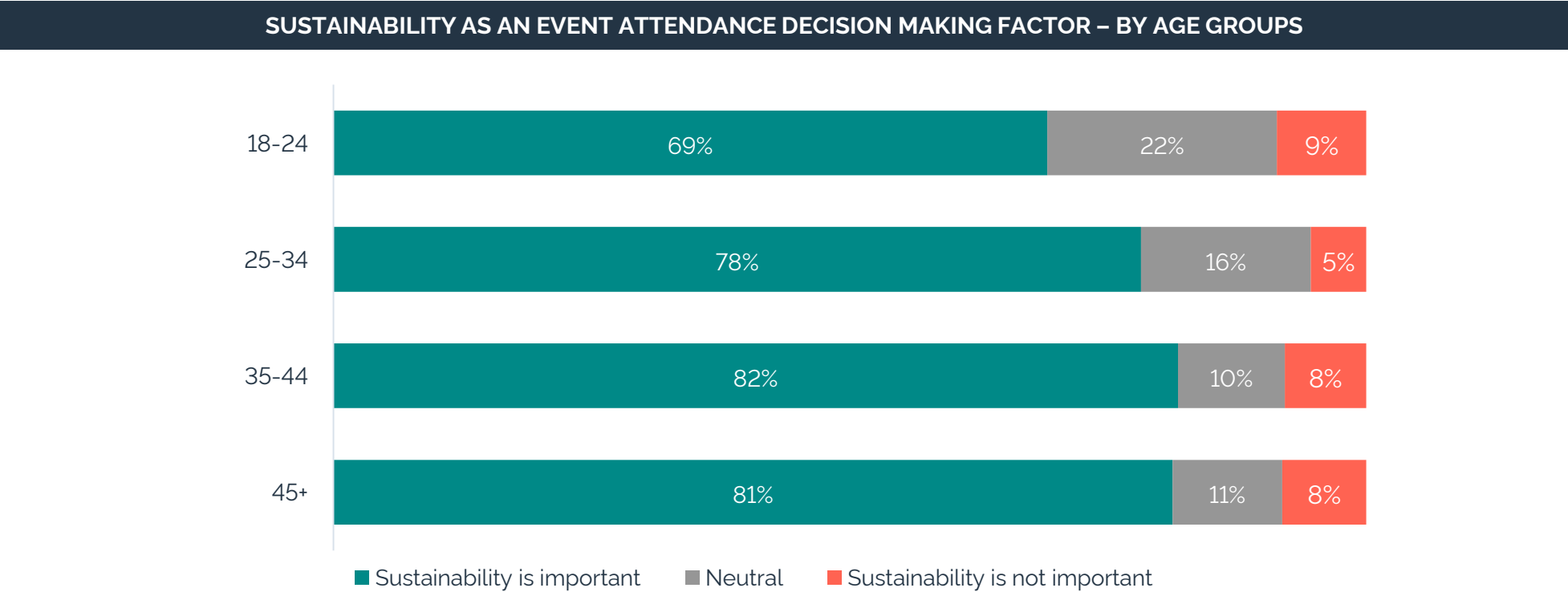
Source: YOUNGOV PANEL

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

Sample Size: FIFA World Cup 2022 – 581, Other Qatar events – 511, Tennis events – 227, Motorsports events – 207, No sports events – 55

QATAR

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



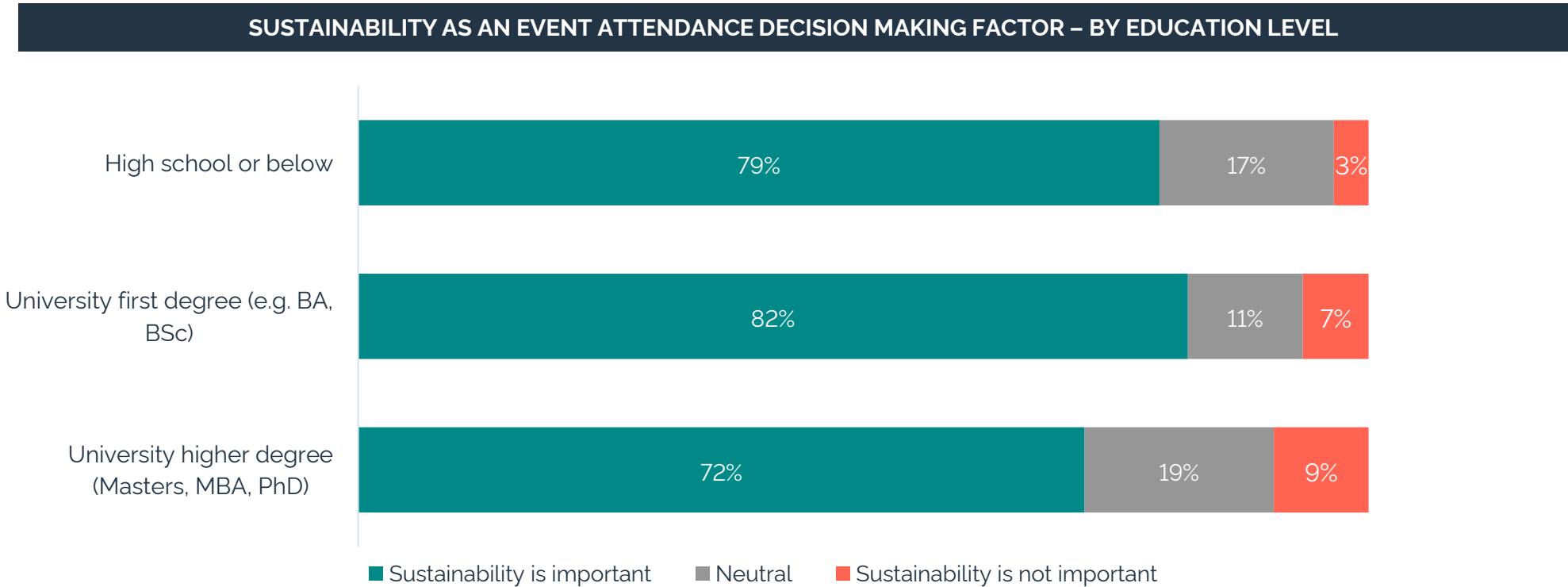
Source: YOUNGOV PANEL

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 – 81, 25-34 years – 298, 35-44 years – 203, 45+ years - 160

QATAR

Sustainability is also a significantly bigger decision making factor to attend events among those with an education of high school or above



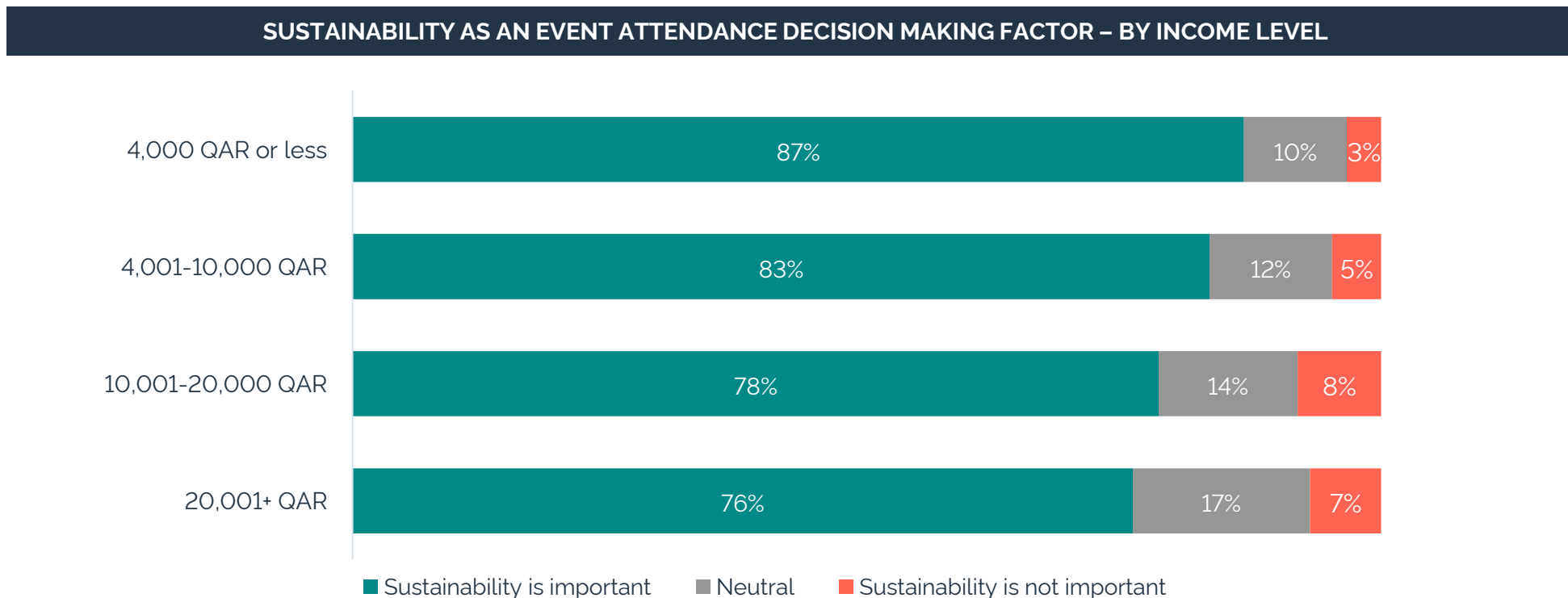
Source: YOUNGOV PANEL

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 – 108, University first degree – 456, University or higher – 119

QATAR

# Sustainability measures have similar importance as decision making factors among all income groups



Source: YOUNGOV PANEL

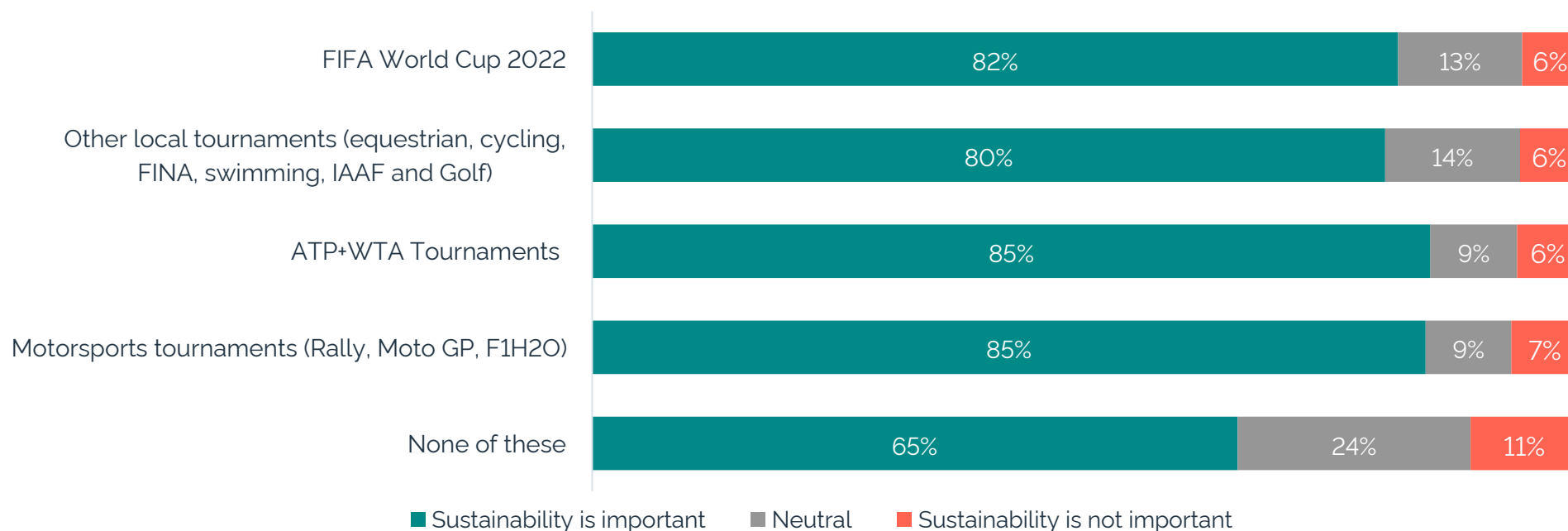
Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: 4,000 QAR or less - 223, 4,001-10,000 QAR- 156, 10,000-20,000 QAR - 137, 20,001+ QAR - 108

QATAR

Importance of sustainable measures 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: YOUNGOV PANEL

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

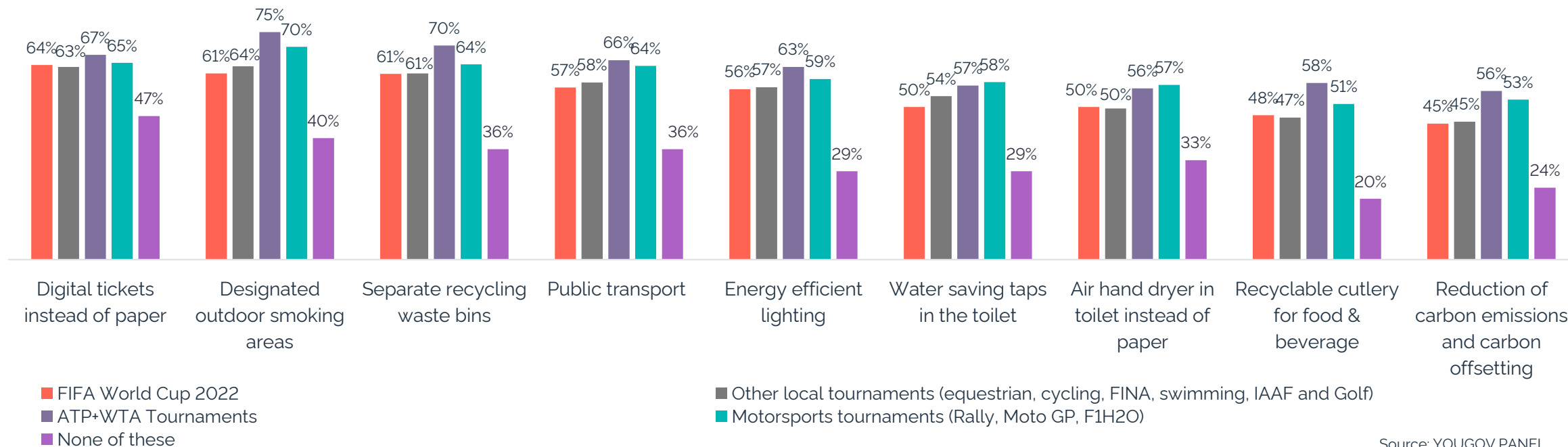
Sample Size: FIFA World Cup 2022 – 581, Other Qatar events – 511, Tennis events – 227, Motorsports events – 207, No sports events – 55

QATAR

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 the streets of UAE.

Awareness of sports event specific measures like public transport to venues and recyclable cutlery for F&B is more among those who consider attending events in Qatar

AWARENESS OF SUSTAINABILITY MEASURES 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

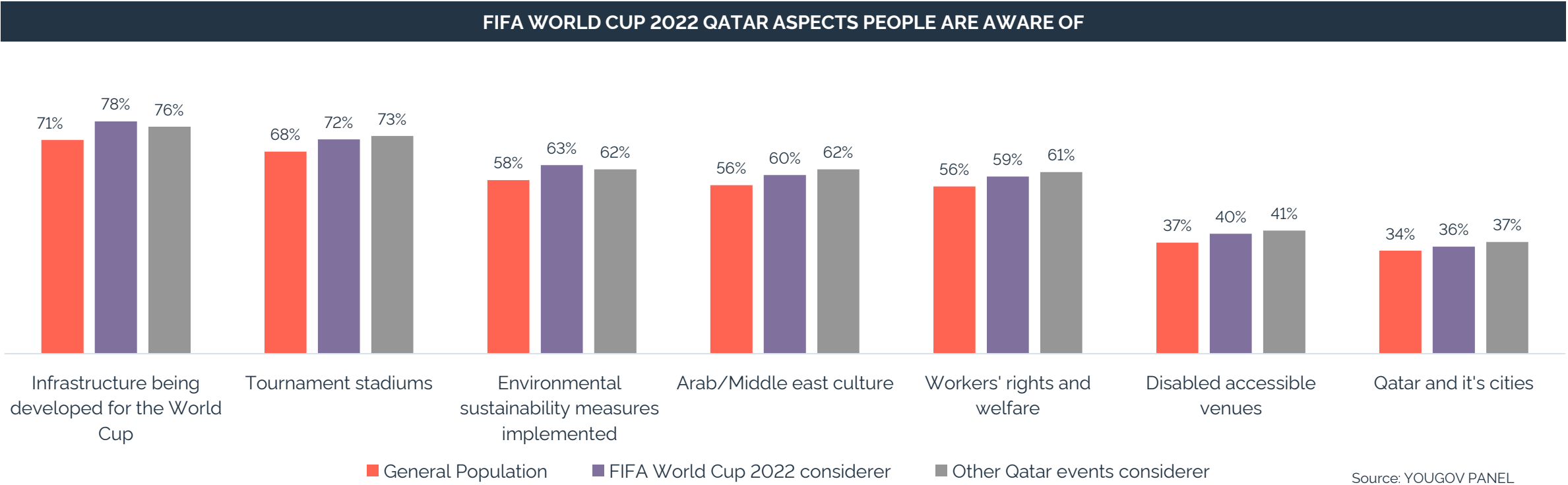
Sample Size: FIFA World Cup 2022 – 581, Other Qatar events – 511, Tennis events – 227, Motorsports events – 207, No sports events – 55



QATAR

Compared to general population, those who consider attending FIFA World Cup 2022 and other sports events in Qatar are slightly more aware of various aspects of the Qatar and the FIFA World Cup 2022.

Infrastructure, stadiums and environmental sustainability measures are the most well known aspects



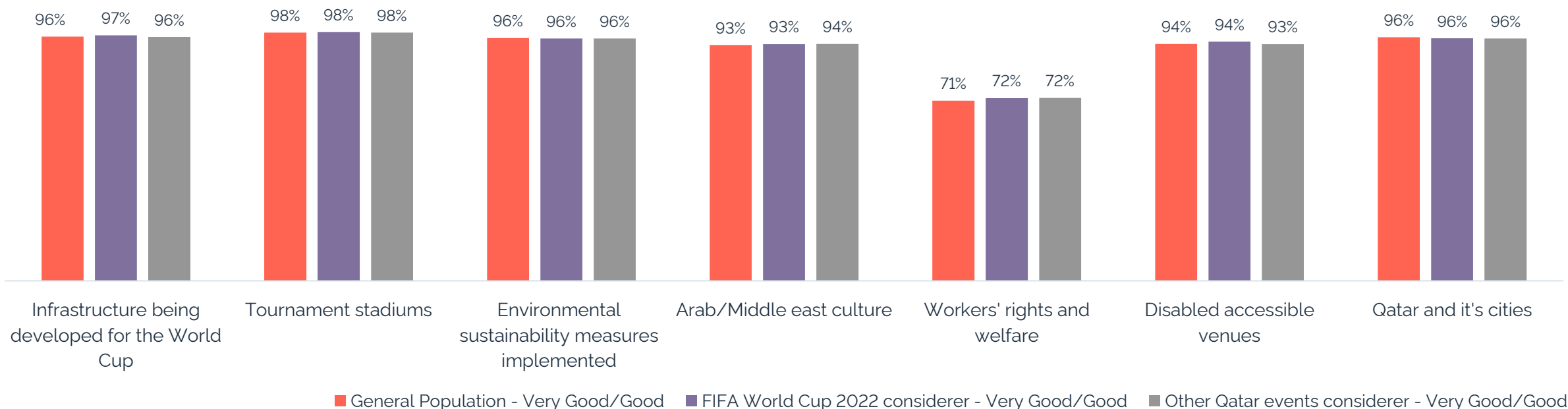
Q: Qatar is hosting the FIFA World Cup in 2022. Which of the following factors regarding the Qatar FIFA World Cup have you heard of in the news?

Sample Size: General population – 742., FIFA World Cup 2022 – 581, Other Qatar events – 550

QATAR

Those aware of the various aspects rate them high across general population as well as those interested in FIFA World Cup 2022 and other Qatar events. 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

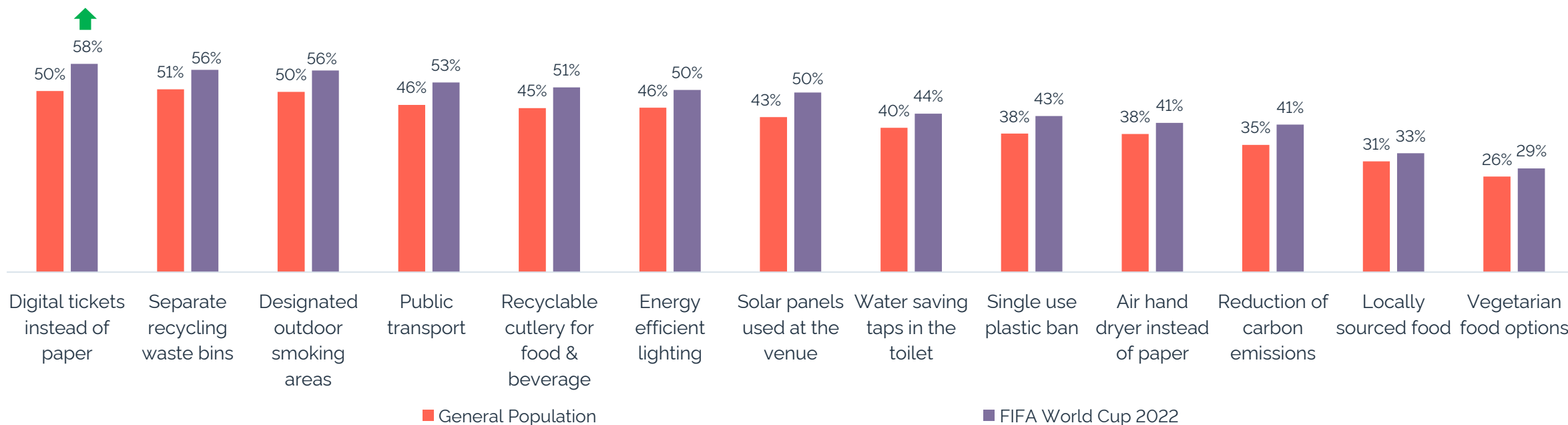
Q: Now, from the news and information that you know about this tournament, how would you rate the Qatar FIFA World Cup on the following?

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

QATAR

Digital ticketing is the most expected sustainability measures among those who consider attending FIFA World Cup 2022, slightly ahead of waste sorting bins and designated outdoor smoking areas.

SUSTAINABILITY MEASURES EXPECTED BY FIFA WORLD CUP 2022 CONSIDERERS



Source: YOUNGOV PANEL

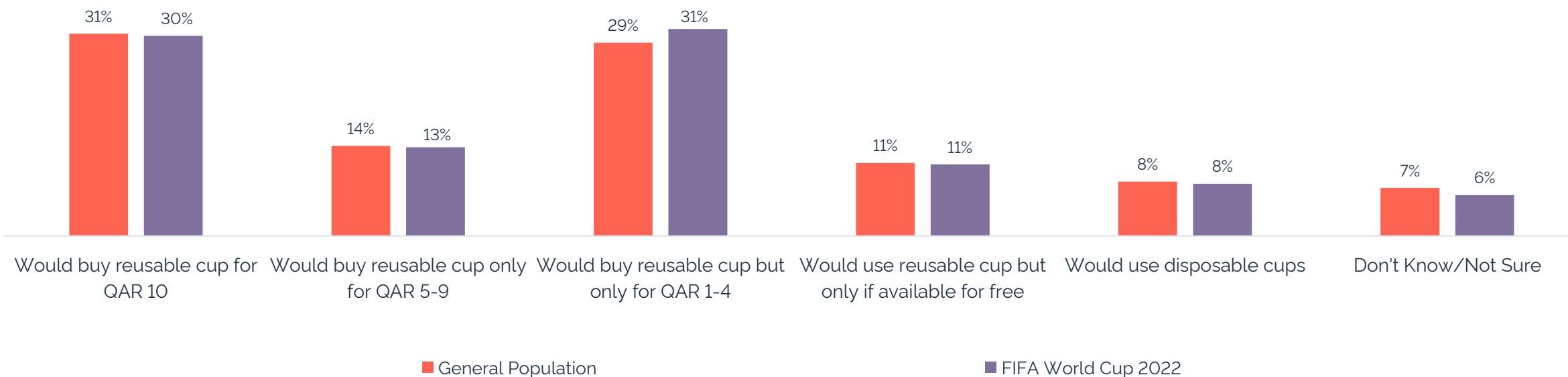
Q: Which of these environmental sustainability measures would you expect at venues for large events?

Sample Size: General Population – 742, FIFA World Cup 2022 – 581

QATAR

Over 7 in 10 people are willing to buy a reusable collector's cup at the World Cup thus reducing single use plastics – A third are willing to pay QAR 10 for the cup

ACCEPTANCE OF REUSABLE COLLECTOR'S CUP



Q: Now imagine you were in Qatar to attend a major sports event like FIFA World Cup 2022. If you had a choice of purchasing a reusable collector's cup for beverages at QAR 10 at the event instead of using disposable cups, then which of these below options would you choose?

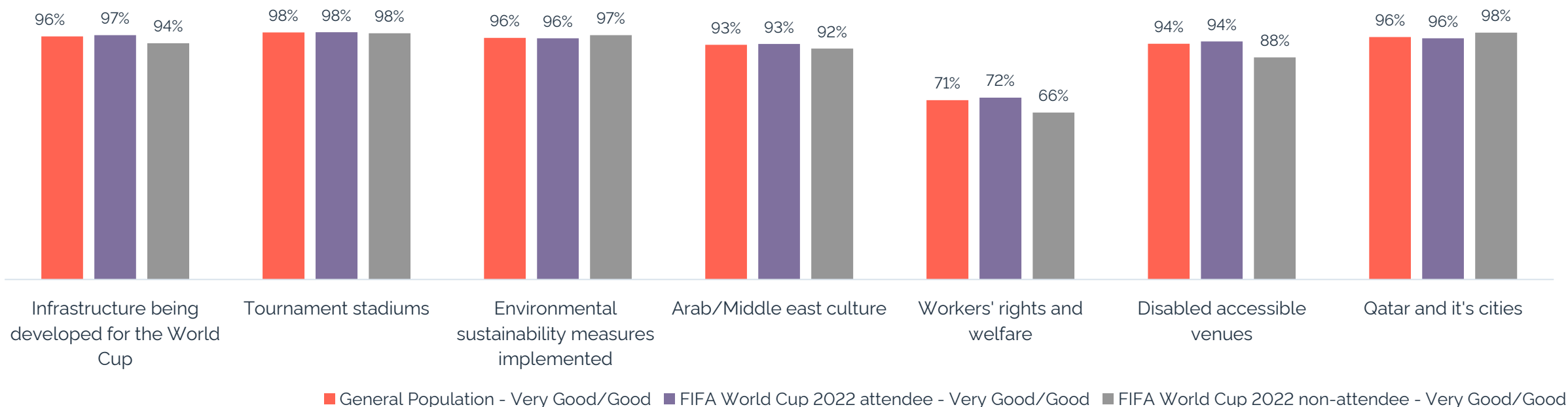
Sample Size: General Population – 742, FIFA World Cup 2022 – 581

Source: YOUNGOV PANEL

QATAR

Those aware of the various aspects rate them high across general population as well as those interested in FIFA World Cup 2022 and other Qatar events. 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

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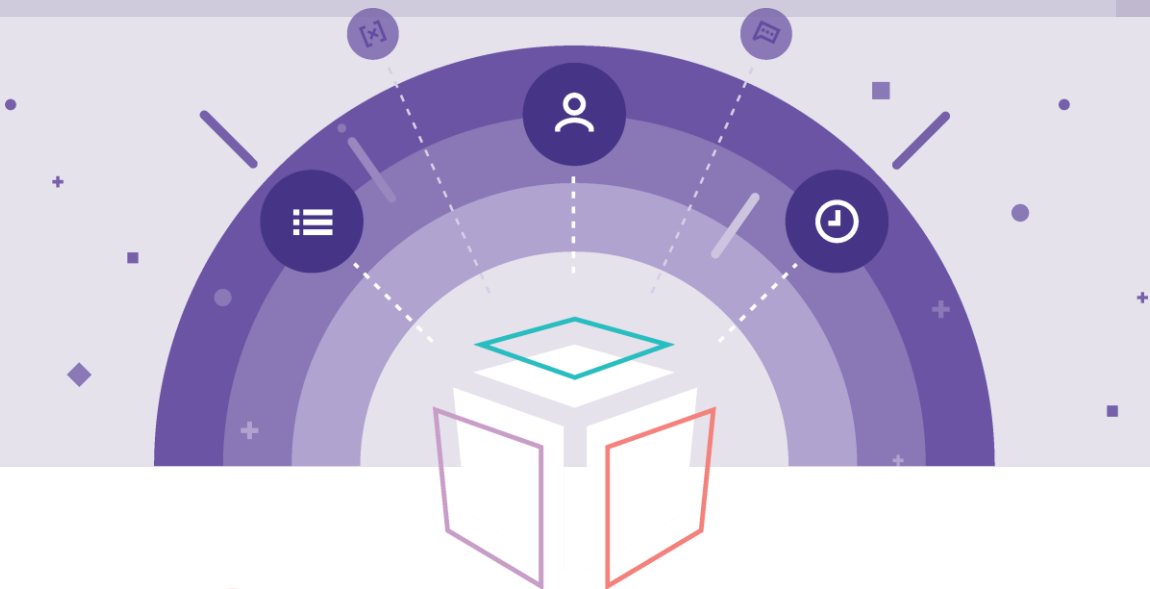
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	Bespoke Consumer Surveys