

YouGov[®]Sport

Bahrain

Sustainability in the sports, events
and tourism industries in Bahrain



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BAHRAIN

Key Areas of Exploration

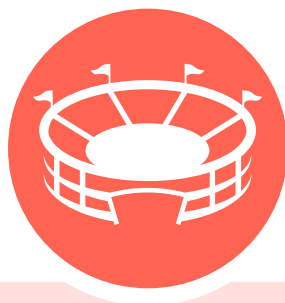


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in Bahrain.

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



Sustainability and its position
in Bahrain



Sports, events & tourism
in Bahrain



Sustainability within sports,
events & tourism

BAHRAIN

Methodology

Research for this project was conducted in 2020 and in 2 phases:

IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry executives
- > Interview length 15 minutes
- > 8 Industry professionals interviewed in Bahrain

DESK RESEARCH

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

BAHRAIN

Bahrain Country Overview

1

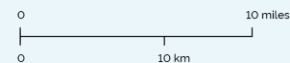
Bahrain

As one of the smallest countries in the Middle East, Bahrain is an archipelago consisting of the main island Al Bahrayn and 30 smaller islands, all sitting off the east coast of Saud Arabia. It has the smallest population of the gulf states and is 90% urbanised with the capital Manama and Muharraq being the most populated cities.

COUNTRY INFORMATION

Size	760 sq. km.
Population	1.5 million
Capital	Manama
Other major cities	Muharraq, Rifa
Languages	Arabic, English
Currency	Bahraini Dinar (pegged to US \$, currently \$9.74)
Borders	Maritime border with Iran, Qatar and Saudi Arabia

Source: Desk Research

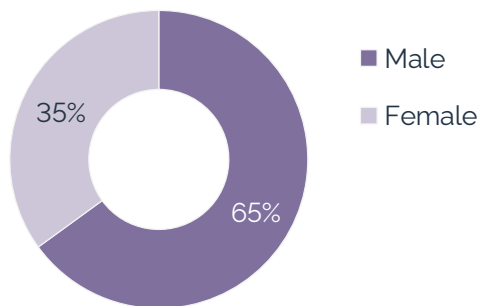


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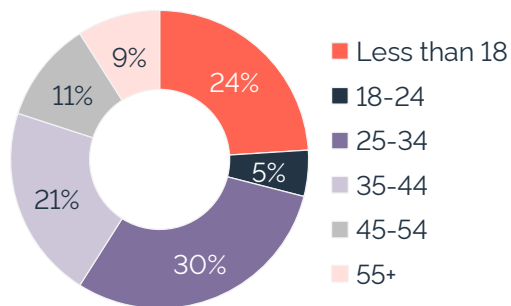
Its people

The Bahrain population is skewed towards younger males. A strategy to attract international investment while reducing foreign workers has seen Bahrain seeking to increase the proportion of locals in the workforce. This has, however, been offset by increased voluntary retirement in the public sector.

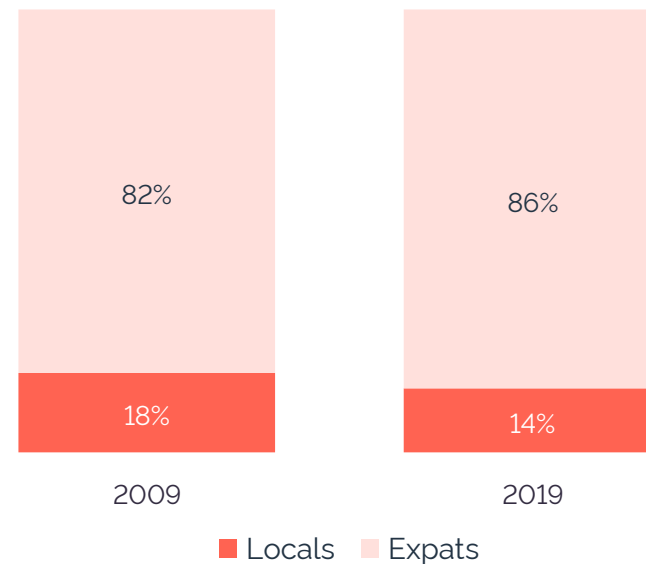
GENDER



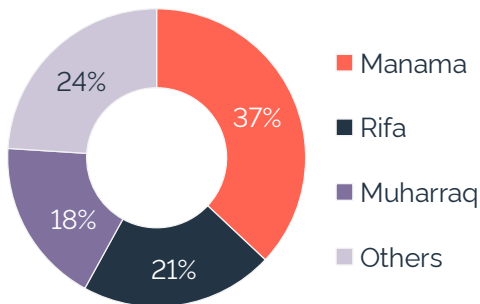
AGE



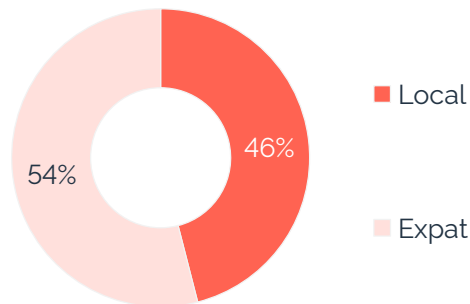
WORKFORCE SPLIT – LOCALS VS EXPATS



LOCATION



NATIONALITY



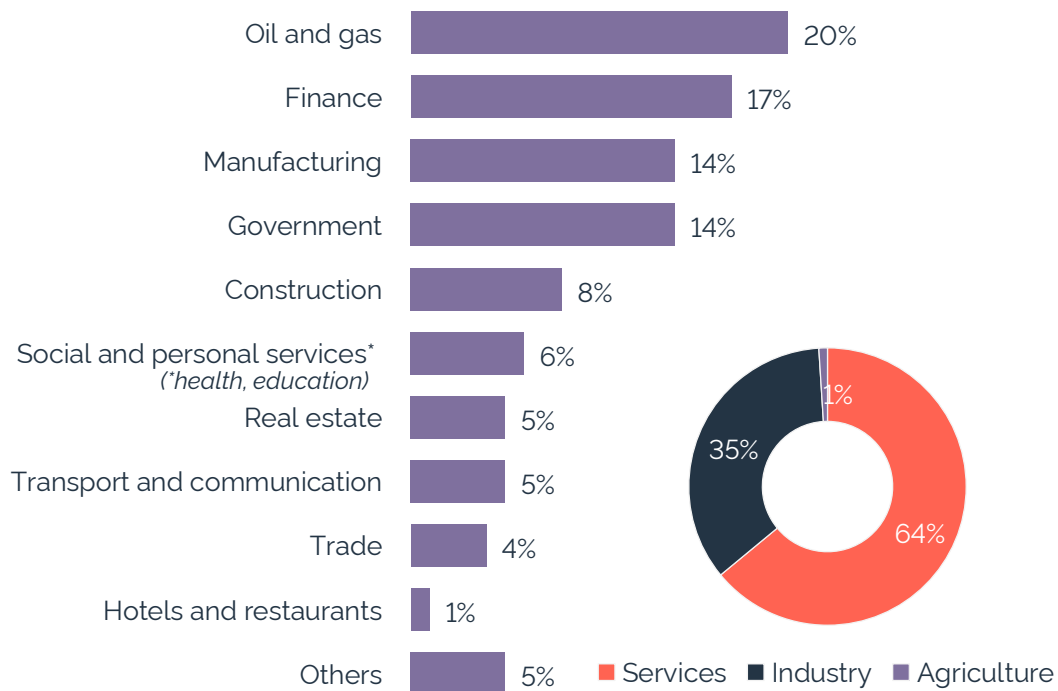
Source: Desk Research, YouGov Panel, Bahrain Labour Market Indicators

BAHRAIN

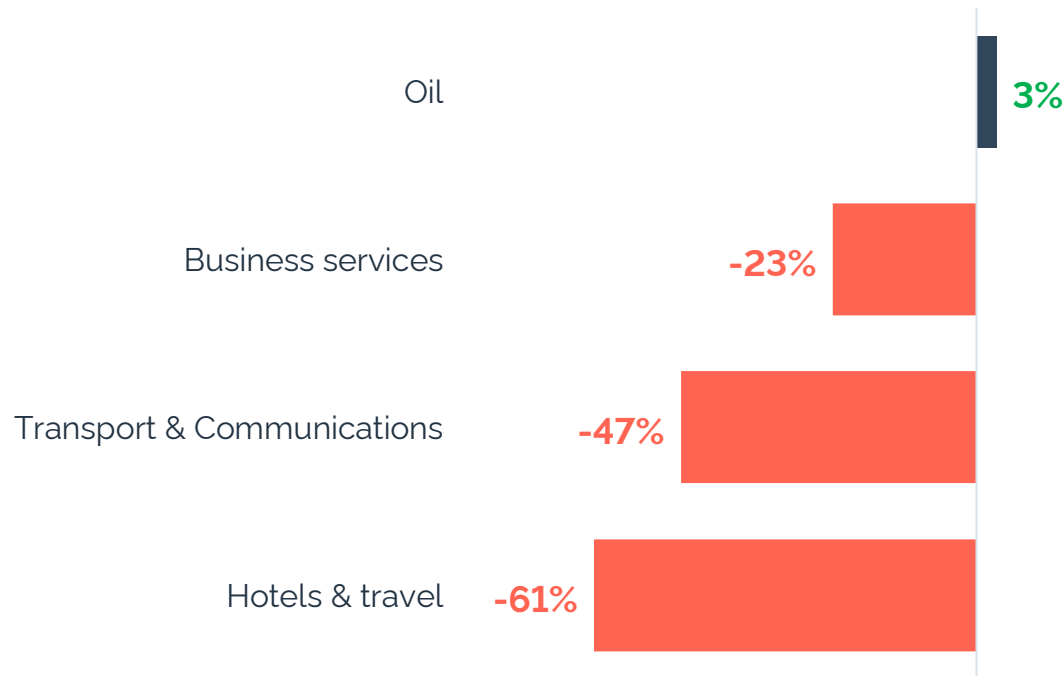
Economy

Similar to the rest of the region, Bahrain's economy is largely linked to the price of oil. The recent slump in oil price has had less of an impact due to a relatively long-established diversified economy. However, it is this non-oil sector that has been hit hardest in 2020, particularly amongst industries related to travel and logistics.

GDP SPLIT BY SECTOR – 2019



YEAR ON YEAR GROWTH – 2020 Q2

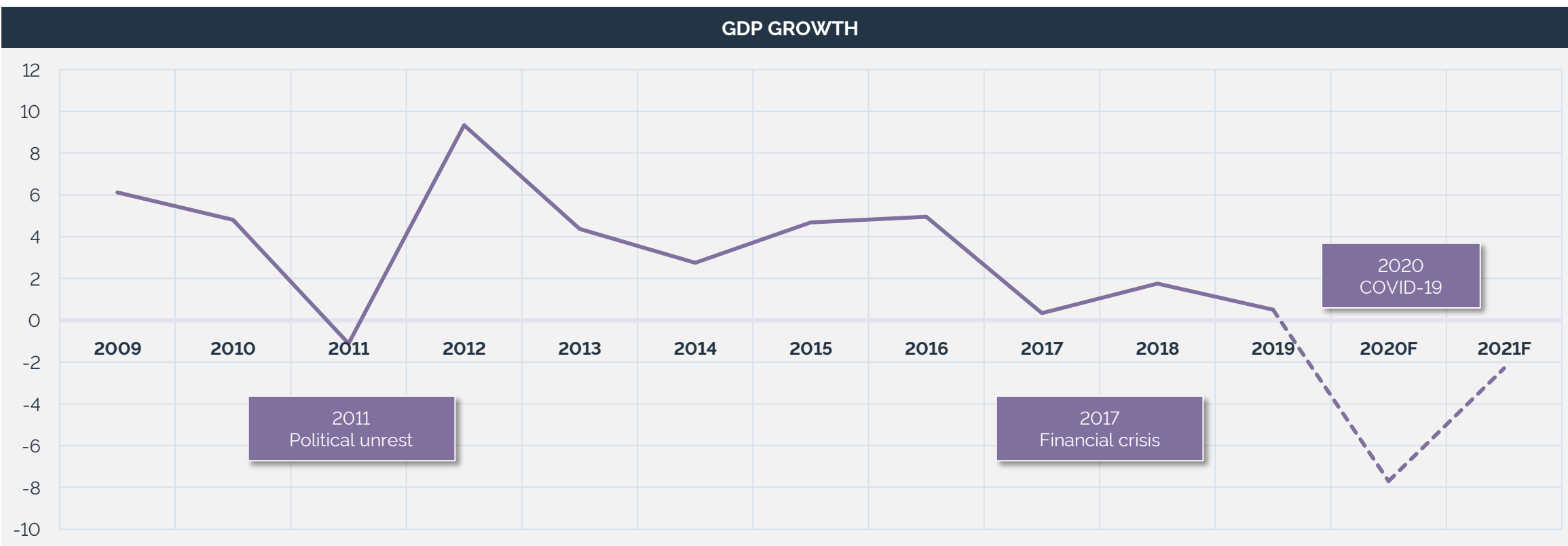


Source: Desk Research, Bahrain Economic Report Q2,2020, NordeaTrade, Trading Economics

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Outlook

Bahrain's economy experienced some turmoil over the last decade; from political unrest to the more recent financial crisis. COVID-19 is likely to compound this in 2020, however, prospects thereafter appear rosier.



Source: Desk Research, World Bank

BAHRAIN

Sustainability in Bahrain

2

BAHRAIN

Vision 2030 was created in 2008 after the recognition that Bahrain's already diversifying economy required structure; a strategy to guide the nation from oil wealth to a globally competitive entity, driven by its private sector.



BAHRAIN ECONOMIC VISION 2030

ECONOMY

Robust economic growth that benefits the population

- › Stimulate growth by enhancing productivity and skills
- › Diversify economy
- › Capture emerging opportunities

GOVERNMENT

An efficient and effective government

- › Focus on high quality policies
- › Public sector becomes more productive
- › Predictable, transparent regulatory system
- › Sustainable government financing with less dependency on oil
- › World class infrastructure

SOCIETY

A just, thriving society

- › High standard of social assistance
- › Access to quality healthcare
- › First rate education system
- › Safe and secure environment
- › Sustainable and attractive living environment

3 guiding principles underpin Vision 2030:

- 1) Fairness
- 2) Competitiveness
- 3) Sustainability

Aligning with:

United Nations Sustainable Development Goals (SDGs)



Vision 2030 aspires to raise the standard of living of all:

- › Improve standards of living
- › Reformed government
- › Develop the private sector
- › Improve education and health services
- › Ultimately, enhanced quality of life

Source: Desk Research, Bahrain Economic Vision 2030

BAHRAIN

The 4 national priorities encompassing vision 2030 have been identified.



PEOPLE

- > Improved standard of living
- > Reduce all forms of inequality
- > Healthy living and provision of decent housing
- > Promote education and innovation



PLANET

- > Promote sustainable resource management strategies
- > Promote economic policies for sustainable development
- > Address climate change
- > Rationalise use of water and energy



PROSPERITY

- > Strong diversified economy and stable financial system
- > Sustainable social and technological progress
- > Support small and medium enterprises that provide opportunities for citizens
- > Optimal usage of expat work force



PEACE AND JUSTICE

- > Promote security and stability of society through policies of law
- > Achieve justice and strengthen democratic system
- > Strengthen diplomatic relations with various countries
- > Enhance effectiveness and efficiency of government performance

> Collaboration between public and private sectors, together with the broader section of Bahraini society will be key to achieve this vision

Source: Desk Research, Bahrain Economic Vision 2030

BAHRAIN

Bahrain's national priorities for Vision 2030 have been mapped against the United Nations SDGs



Source: Desk Research, Kingdom of Bahrain Voluntary National Review Report on the SDGs

People

SDG #	Goal
1	No Poverty
2	Zero Hunger
3	Good Health and Well Being
4	Quality Education
5	Gender Equality
7	Affordable and Clean Energy
6	Clean Water and Sanitation
10	Reduced Inequalities
11	Sustainable Cities and Communities

Prosperity

SDG #	Goal
8	Decent Work and Economic Growth
9	Industry, Innovation and Infrastructure
12	Responsible Consumption and Production
17	Partnership for the Goals

Planet

SDG #	Goal
6	Clean Water and Sanitation
7	Affordable and Clean Energy
11	Sustainable Cities and Communities
12	Responsible Consumption and Production
13	Climate Action
14	Life Under Water
15	Life on Land

Peace & Justice

SDG #	Goal
16	Peace, Justice and Strong Institutions

BAHRAIN

SELECTED PROJECT

Vision 2030 in Bahrain extends to environmental protection for which plastic usage is a major culprit.

Bahrain banned the usage of single-use plastic bags in July 2019. In 2020 the ban extended to the manufacturing of polythene and polypropylene sheets, primary component of plastic tableware.

- > Reduction of 300 tonnes of plastic waste per day in Bahrain
- > Bahrain factories allow the manufacture biodegradable plastic bags only
- > Reduction of 1 tonne of plastic saves 1.8 tonnes of oil
- > Estimated 100,000 marine animals saved annually in Bahrain due to the ban



Source: Desk Research, Trade Sites

BAHRAIN

Industry professionals' awareness:

Sustainability is widely understood by industry professionals; its impact and how it sits within society.



"Bahrain is working to fulfill its commitment towards the sustainable development goals adopted by the United Nations in 2015, including the seventh goal of ensuring universal access to clean and sustainable energy. The Kingdom has succeeded in ensuring universal access to energy sources, as 100% of the population benefits from services Electricity and water. So, they set the national renewable energy plan."

Sport League

"It is about the sustainability of life, the environment we live in, the natural resources. Humans have a direct or an indirect impact on preserving the environment and affect it in a positive or negative way."

Jaffar

"It concerns the environmental effects on humanity, it works on minimizing the damage therefore it relies on renewable resources.

It studies the ecological environment and implements strategies depending on it on multiple industries such as the economy and agriculture in order to organize work."

Ministry of Sport and Youth

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Sport and events in Bahrain

3

BAHRAIN

Bahrain is an important stop in the Formula 1 calendar. The country also focusses on adrenaline and fitness-based events like the Brave CF MMA and Ironman 70.3 Middle East which are gaining popularity throughout the region

Formula 1 – Bahrain Grand Prix



Brave CF – Mixed Martial Arts



Ironman 70.3 Middle East



Bahraini Premier League



Troon Series – MENA Golf Tour



BAHRAIN

Compared to its neighbours, Bahrain hosts fewer international sporting events. However, the Formula 1 Bahrain Grand Prix is by far the biggest sporting event in the annual calendar.

KEY SPORTING EVENTS				
Event	Sport	City	Local / International / Global	Attendee Numbers
Bahrain Grand Prix	Formula 1	Sakhir	Global	97,000
Brave CF – MMA Amateur World Championship	Mixed Martial Arts	Manama	Global	
Troon Series – Royal Golf Bahrain Open	Golf	Al Mazrowiah	International	
ASTC Triathlon West Asian Championships	Triathlon	Manama	International	
Ironman 70.3 Middle East Championships	Ironman	Manama	International	3,000
Bahrain Premier League	Football	Multiple cities	Local	
Bahrain Basketball League	Basketball	Multiple cities	Local	
Bahrain Drag racing championships	Motorsports	Sakhir	Local	

Source: YouGov Sport, Desk Research, event sites

BAHRAIN

Bahrain's cultural events are largely local and designed to engage residents, with the majority being held in the capital.

KEY LEISURE EVENTS			
Event	City	Local / International / Global	Attendee Numbers
Shop Bahrain	Multiple cities	Local	450,000
Bahrain Annual Fine Arts Exhibition	Manama	Local	220,000
Bahrain Food Festival	Manama	Local	220,000
Bahrain Farmers Market	Al Budaiya	Local	210,000
Bahrain Autumn Fair	Manama	Local	200,000
Bahrain Summer Festival	Riffa	Local	100,000
Bahrain 8 in 1 Expo	Manama	Local	15,000
Bahrain Heritage Festival	Riffa	Local	10,000
Boulevard Circus	Manama	Local	9,000
5PM at Bab	Manama		
The Hub	Manama		

Source: YouGov Sport, Desk Research, event sites

BAHRAIN

The majority of venues are located in the capital and cater for football. Little publicised information on sustainability features.

KEY VENUES				
Venue	City	Capacity	Built in	Main event
Bahrain International Circuit	Sakhir	70,000	2004	Formula 1
Bahrain International Exhibition and Convention Centre	Manama	30,000	1991	Exhibitions
Bahrain National Stadium	Riffa	24,000	1982	Football – International matches
Khalifa Sports City Stadium	Isa	15,000	1968	Football – Bahrain Premier League
Madinat Hamad Stadium	Manama	12,000	1970	Football – Bahrain Premier League
Al Ahli Stadium	Manama	10,000	1958	Football – Bahrain Premier League
Al Muharraq Stadium	Arad	10,000	1962	Football – Bahrain Premier League
Juffair Sports hall	Manama	3,000	2015	Basketball
Al Najma Club Stadium	Manama	3,000	1982	Football – Bahrain Premier League
Um Al-Hassam Sports Halls Complex	Manama	2,600	2013	Handball
Bahrain National Theater	Manama	1,000	2012	Concerts

Source: YouGov Sport, Desk Research, event sites

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Sustainability in sport and events in Bahrain

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SELECTED PROJECT

Bahrain has sustainable development goals outlined at a national level; As a small nation what opportunity is there for sport and events, we looked to understand how this has filtered down.

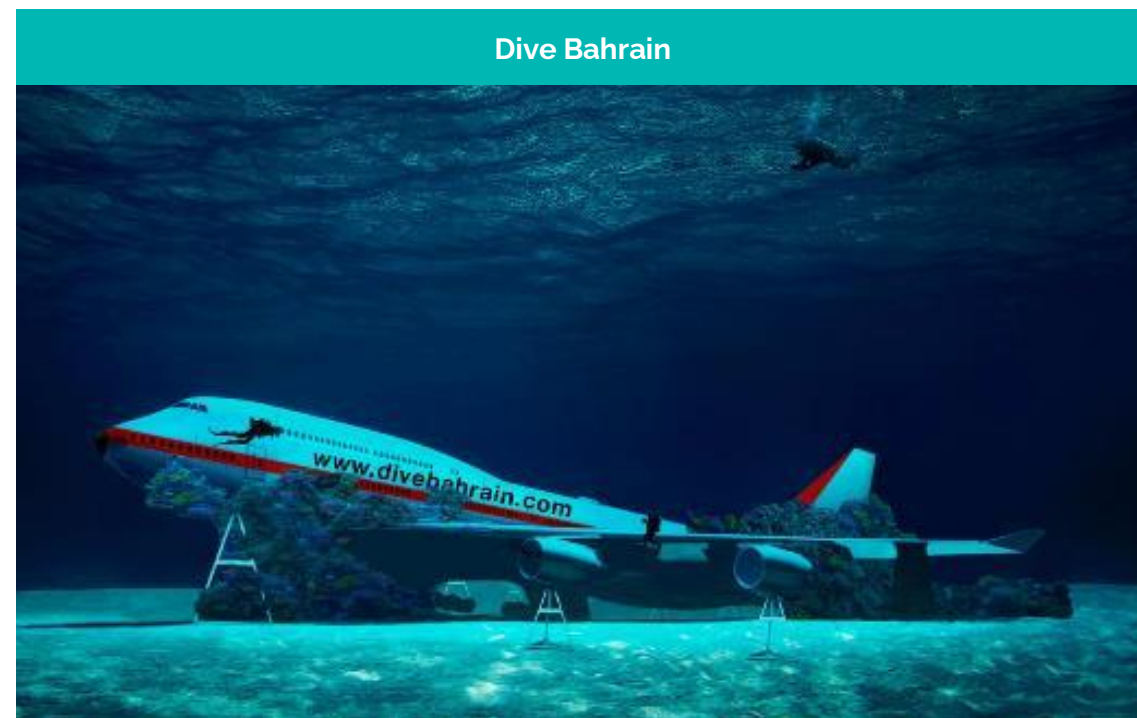


- > Nearly 13 million tourists visited Bahrain in 2018
- > While the majority arrive across King Fahad Causeway for a short visit only, Bahrain is eager to attract more international visitors

The tourism sector is a key revenue stream of the future and Bahrain needs to provide world class attractions to compete with its neighbours. Dive Bahrain was launched in 2019 and claims to be the world's largest underwater theme park – embracing sustainability as its core principle

- > The dive site covers an area of 100,000 square metres and has a 70-metre long decommissioned Boeing 747 as its centre piece
- > Preparing the aircraft for submersion included removing all possibly-toxic substances in order to preserve the marine environment.
- > All structures are all made of eco friendly, sustainable materials
- > The submerged attractions will allow coral reef growth and a habitat for marine life in the surrounding areas.
- > The project also aims to provide researchers with information and data on marine ecology and hopes to raise awareness on the growing importance of preserving marine habitats

Source: Desk Research, Dive Bahrain



BAHRAIN

SELECTED PROJECT

The GEO Foundation is the international not-for-profit organisation dedicated to helping golf deliver and be recognised for a positive impact for people and nature.

Programmes connect the efforts and knowledge of the global golf community and recognize those who are a part of the sport's sustainability movement:

OnCourse programme

OnCourse Facilities

Online programme to help clubs get more from sustainability

OnCourse Tournaments

Guidance, mentoring and communications for golf tournaments

OnCourse Developments

Guidance and mentoring with credible assurance for golf developments

The Royal Golf Club, Bahrain

- > The Royal Golf Club is participating in the OnCourse programme, being committed to continual improvements in the sustainability areas of Nature, Resources, and Community



Supporting Partners



Source: Desk Research, SustainableGolf

BAHRAIN

Leading by sustainable example:

Industry professionals' knowledge around sustainability ranges considerably – from well versed in international examples, to some confusion around local initiatives with many having none at all.

INTERNATIONAL EXAMPLE

"Some European football stadiums are environmentally transformed by installing seats made from recycled plastic, and in Amsterdam, fans bought old seats as souvenirs. The Pontedera City Stadium in Italy features plastic benches made from local waste. In England, the Forest Green Rovers club won the title of the greenest football club in the world after its success in operating its fields with solar energy and by recycling the water and providing a full vegetarian list for the players and fans.... Tokyo Olympics and the American Football League. All gold, silver and bronze medals are manufactured directly from old cell phones, computers and other recycled electronic waste."

Sport League

**INTERNATIONAL EXAMPLE**

"Al-Farabi National Foundation in Kazakhstan (is doing well)."

Sport Club

LOCAL EXAMPLE

"Bahrain started a campaign 'plastic is not fantastic' for recycling plastic waste in collaboration with the Supreme Council for the Environment and made the facilities responsible for spreading awareness in Bahrain."

Ministry of Sport & Youth

LOCAL EXAMPLE

"All who work in design of building and roads implement it, especially in the western countries. However, here, big companies implement it."

Major Tourist Attraction

LOCAL EXAMPLE

"The information center because it gives us information that are true, medical and modern. Information about the use of the sustainability services, spreading awareness."

I also see us going towards green houses that preserve the environment by using solar panels for example."

Tourism Governing Body

LOCAL EXAMPLE

"There are events that implement sustainability practices, like recycling, in an NGO. They did a campaign 'Al Imam Zayn Alabidi' where they did many practices including recycling and the preservation of the environment and how we can recycle the wastes at home and reuse it."

Major Events

BAHRAIN

Single use plastics:

There is creeping awareness of activity around the reduction of single-use plastic, specifically bags.

"Currently, for example, as I am seeing, they are using paper bags and recycled bags in the supermarket. I do not know whether they started implementing this here in the middle east or not.

In Europe and the United States, they already started implementing it, even though this is an old idea.

In the past, we used to have paper bags in the Arab countries; everything was made out of paper.... Now, they are going back to paper, but this time paper is recycled. Before, there was not any recycling."

Major Tourist Attraction

"Bahrain has completed the first step regarding reducing the use of plastic, in all the facilities there are no fences except biodegradable ones. The second step will be completed within the two upcoming years and it will mainly focus on replacing plastic materials without adding any extra cost on the consumer.

The Supreme Council for the Environment aims through spreading awareness to shed the light on the negative effects of plastic waste on the recent and the future and encouraging them to reduce the use of plastic and using ecofriendly material Bahrain also implemented a law to preserve the environment."

Ministry of Sport and Youth

"An initiative of sustainability practices is replacing single use plastic bags with other bags."

Sport League

"Awareness is spreading when it comes to the use of plastic but there is no real execution of the elimination of plastic because there is no law for it."

Tourism Governing Body

"Reducing the use of plastics that are disastrous for the human environment and turning them into environmentally friendly materials... There are more than one event. They use paper instead of plastic.

It is even found in businesses; they use paper material instead of plastic. There are waste bins for sorting materials for recycling."

Sport Ministry

> No acknowledgement of recent law changes in the procurement or manufacture of single-use plastic specifically

BAHRAIN

Sustainable initiatives in practice:

Some clear indications of sustainability being considered and implemented in Bahrain – though, some professionals claimed they were working with none.

" , improving animal diversity, preserving natural resources, using products that would not harm natural resources, using processed water and using the best techniques. Informing the people in charge of their responsibility towards sustainability and encouraging them to do so."

Sport Club

"All our projects. Nowadays, when he thinks about designing something, We have to take sustainable energy as a good factor in order to save energy and cost."

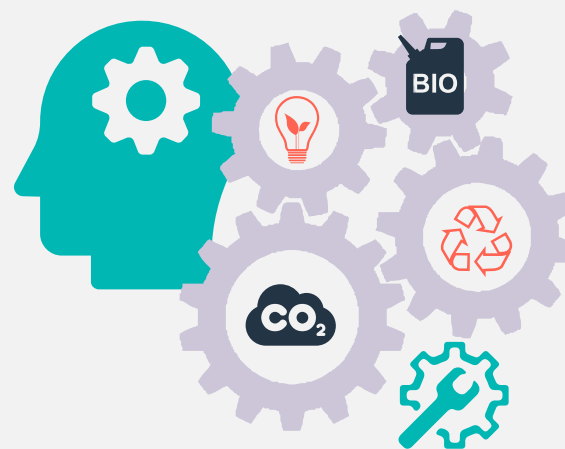
Major Tourist Attraction

"implementing environmental sustainability, sorting garbage, taking into consideration climate change, adopting internal financial policies designed to operate in an environmentally friendly manner."

Sport Club

"We take into consideration the climate, preserve energy and water and resources, also the environmental change, public health and safety and Corporate social responsibility and community involvement."

Ministry of Sport & Youth



"Amending environmental legislation and developing environmental management systems. Increase the direction towards green economic development that is less carbon dependent.

Completing the institutional framework for managing national efforts to adapt to the impacts of climate change.

Inclusion of the environmental dimension in development projects. Adopting internal fiscal policies that stimulate and support environmentally friendly enterprises and toughen penalties against wrong environmental practices."

Sport League

BAHRAIN

Importance of sustainability:

Consistent agreement of the importance of sustainability in industry amongst our professionals.

"Of course it is, because it promotes growth and preserves the environment and promotes living in a healthy way. You could implement sustainability in sports and tourism.

In sports for example we can make use of the metro for transportation, and there should be trainers there to show them the way.

On an environmental scale we would be reducing the pollution and the use of gas by replacing it with solar energy."

Tourism Governing Body



"Yes of course. The UN works on implementing sustainability in sports for a healthy and safe lifestyle on the long run."

Sport Club



"Of course, it is very important. It would reduce the harm made from man all over the world and it affects climate change."

Sport Club



"Yes, it is very important. The practices that the humans do affect the environment negatively. It leads to the increase of carbon levels in the air. This effects the plants and increases global warming. In the long run, it will lead to the increase of temperature of Earth.

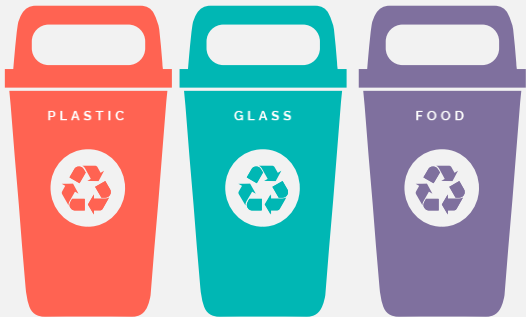
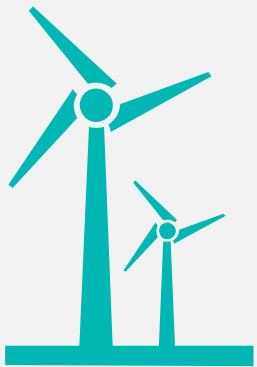
Therefore, the humans have a negative role so there is a responsibility on them to preserve the environment and its resources through sustainability."

Major Events

BAHRAIN

Relevance of event size:

A general quiet consensus around the need for sustainability initiatives no matter the size. However, there is recognition of the efforts required and awareness larger events can bring.



"No matter what the event size is, big or small, sustainability must be a factor in the event,"

Major Tourist Attraction

"No it's not, the important thing is implementing sustainability."

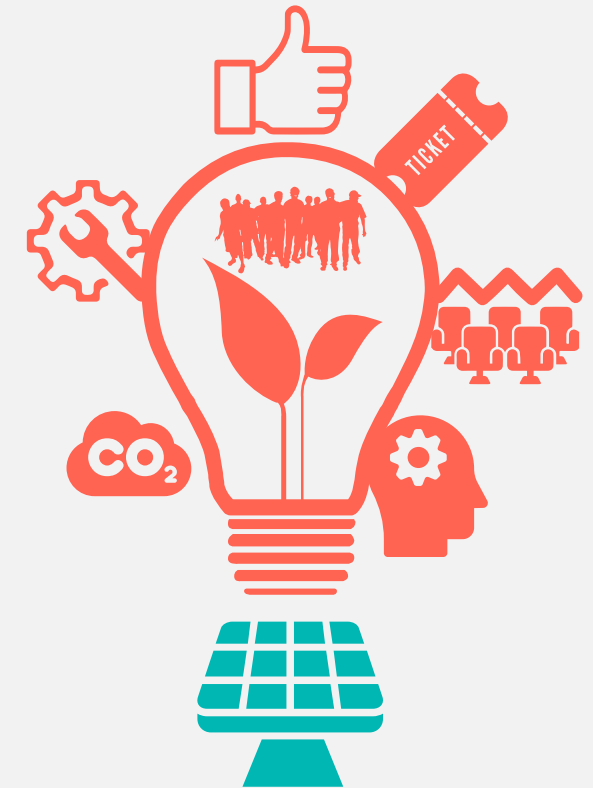
Sport Club

"Yes, the importance of big events differ from the one of small events because it implements sustainability on a bigger scale and globally and it is able to make progress in this matter through training and education."

Sport Club

"Yes, because the goals and capacities to reach them will differ."

Ministry of Sport and Youth



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Accreditation and measurement:

The majority of industry professionals had knowledge of ISO 20121 and for the most part do believe in the measurement of sustainability.

- > Sustainability measurement should differ according to country development and goals

ISO 20121

"... the ideal starting point for any event is sustainability. It means managing the event so that you get more with fewer resources.

The ISO 20121 standard helps reduce your impact on the environment and local communities. It will also push performance to the maximum extent possible while achieving energy efficiency while obtaining the full support of all stakeholders.

The ISO 20121 standard has been specifically developed for the event organization to help keep sustainability a top priority when managing and organizing your events."

Sport League

"Dubai Sports Council on the head of global governmental sports institutions was ISO certified for organizing and managing events in a sustainable way. It is the first governmental sports facility in the world to be certified as a reward for implementing measures and its commitment to international quality standards."

Ministry of Sport and Youth

"It is standard that works on a long-term vision for sustainability. It determines the methods that can be used to achieve the organization of goals and practices and define roles."

Sport Club

MEASUREMENT

"No I don't think there should be. It should be implemented because of awareness and not because it is forced."

Tourism Governing Body

"Yes of course, economic measurement, social measurement and environmental measurement.

(Benchmarks should differ)...Many resources found in a country are not found in another. Each country is different from others in terms of climate, temperature and means of transportation."

Sport Ministry

"Before measuring sustainability, it must be a cultural phenomenon in the society and people know about it, its importance, its goals and its process when we want to compare Bahrain, with its people, culture and its level of awareness of preserving the environment and the cleanliness of its streets, to the level of awareness of another country....

In Bahrain, the government might not do events related to sustainability. It might not have any programs, ads nor awareness campaigns, but the people maintain sustainability."

Major Events

BAHRAIN

Conclusions

5

Nudge, push or pull?



There has to be reinforcement on the rules that the government imposes."

BAHRAIN

Conclusions

A decent degree of awareness around sustainability and the position it should play in the future, particularly in sports and events.

- > General awareness and knowledge of Bahrain's Vision for sustainability, with some confusion on detail.
- > Some sustainable work remits already exist, largely at a non customer facing level (renewable energy, solar power)
- > Gradual awareness of the elimination of single-use plastic (from Government initiative to observation)
- > Little acknowledgement of what is required to achieve the vision from an industry point of view:
 - *Understanding that Bahrain is 'ready' due to Government plans and initiatives*
- > Some concern that unless the government actually impose laws, nothing will happen

Recommendations

Further down the diversification path than its neighbours, Bahrain has recently struggled financially. Will the investment in sustainable initiatives be the most pressing?

- > On a basic level, there is knowledge around why sustainability is important, though few initiatives appear to be top of mind
 - *The recent ban on plastics needs to be communicated to reach the community*
- > The connection between Vision 2030 and industry needs to be made more tangible and in evidence:
 - *Requires guidance – what does it mean to industry*
 - *Financial support will be crucial*
- > Consideration over law enforcement – society and industry need to be pushed?
- > Events themselves should leverage their communication platforms to raise awareness and educate the population
 - *Both in marketing around, pre and during events*
 - *creating nudge behavioural practices along the way*

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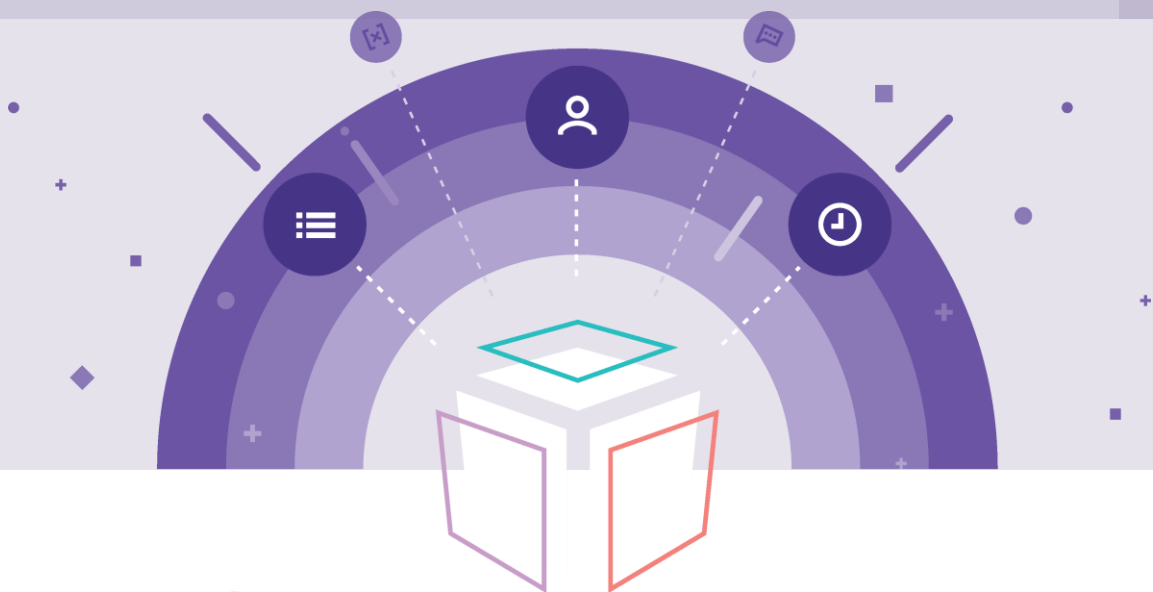
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At the heart of our company is a global online community, where millions of people and thousands of political, cultural and commercial organisations engage in a continuous conversation about their beliefs, behaviours and brands.

The best panel, the best data, the best tools

Available from YouGov	
Broadcast Viewership Analysis	BrandIndex
Media Monitoring & Valuation	SportsIndex
Sponsorship Valuation	FootballIndex
Sponsor Fit Analysis	DestinationIndex
Branding Optimisation	Fan / Consumer Profiling
Economic Impact Assessment	RealTime / Omnibus Surveys
	Bespoke Consumer Surveys