



YouGov[®] Sport

Kingdom of Saudi Arabia

Sustainability in the sports, events
and tourism industries in the
Kingdom of Saudi Arabia



CONTENTS

BACKGROUND & OBJECTIVES

METHODOLOGY

- 1 COUNTRY OVERVIEW
- 2 SUSTAINABILITY IN THE KINGDOM OF SAUDI ARABIA
- 3 SPORTS, EVENTS & TOURISM IN THE KINGDOM OF SAUDI ARABIA
- 4 SUSTAINABILITY IN SPORTS, EVENTS & TOURSIM
- 5 CONCLUSIONS & RECOMMENDATIONS

CONTACT

Sara Eddleston
Head of Sport Consumer

T: +44 7384 832 212

E: sara.eddleston@yougov.com

KINGDOM OF SAUDI ARABIA

Key Areas of Exploration

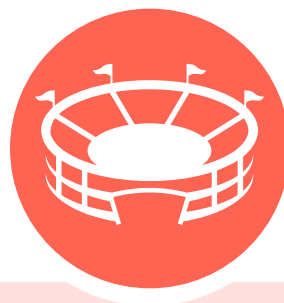


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in the Kingdom of Saudi Arabia.

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



Sustainability and its position
in Saudi Arabia



Sports, events & tourism
in Saudi Arabia



Sustainability within sports,
events & tourism

KINGDOM OF SAUDI ARABIA

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
- > 10 Industry professionals interviewed in the Kingdom of Saudi Arabia

DESK RESEARCH

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

KINGDOM OF SAUDI ARABIA

Kingdom of Saudi Arabia Country Overview



1

Kingdom of Saudi Arabia

The Kingdom of Saudi Arabia (KSA) occupies the bulk of the Arabian Peninsula and is a major producer and global distributor of crude oil.

COUNTRY INFORMATION

Size	2.1m sq. km
Population	34.2 million
Capital	Riyadh
Other major cities	Jeddah, Dammam
Languages	Arabic, English
Currency	Saudi Riyal (pegged to US \$, currently \$0.27)
Borders	Iraq, Jordan, Kuwait, Oman, Qatar, UAE and Yemen

Source: Desk Research



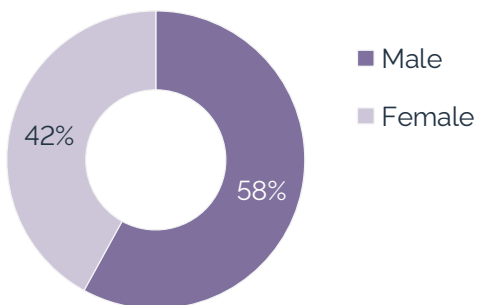
Divided into 13 provinces, the capital city Riyadh is located in the second largest province and is the most populous city in the Kingdom

KINGDOM OF SAUDI ARABIA

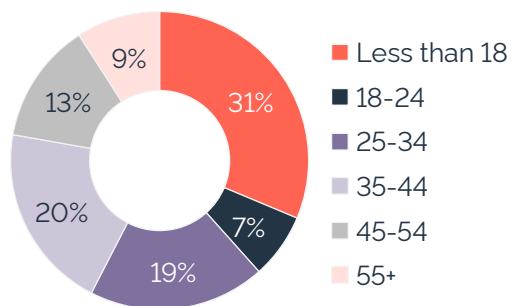
Its people

With a young, local and largely male population, more Saudis have entered the workforce since 2016 as part of the 'Saudization' vision. This is usually at the expense of expats.

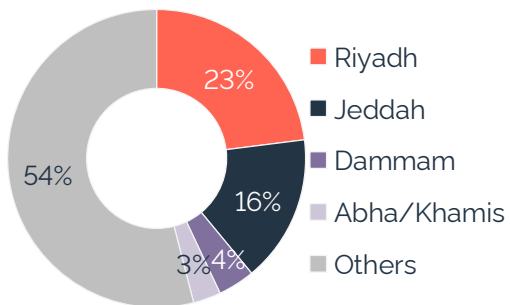
GENDER



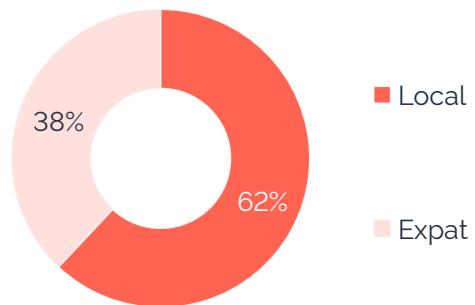
AGE



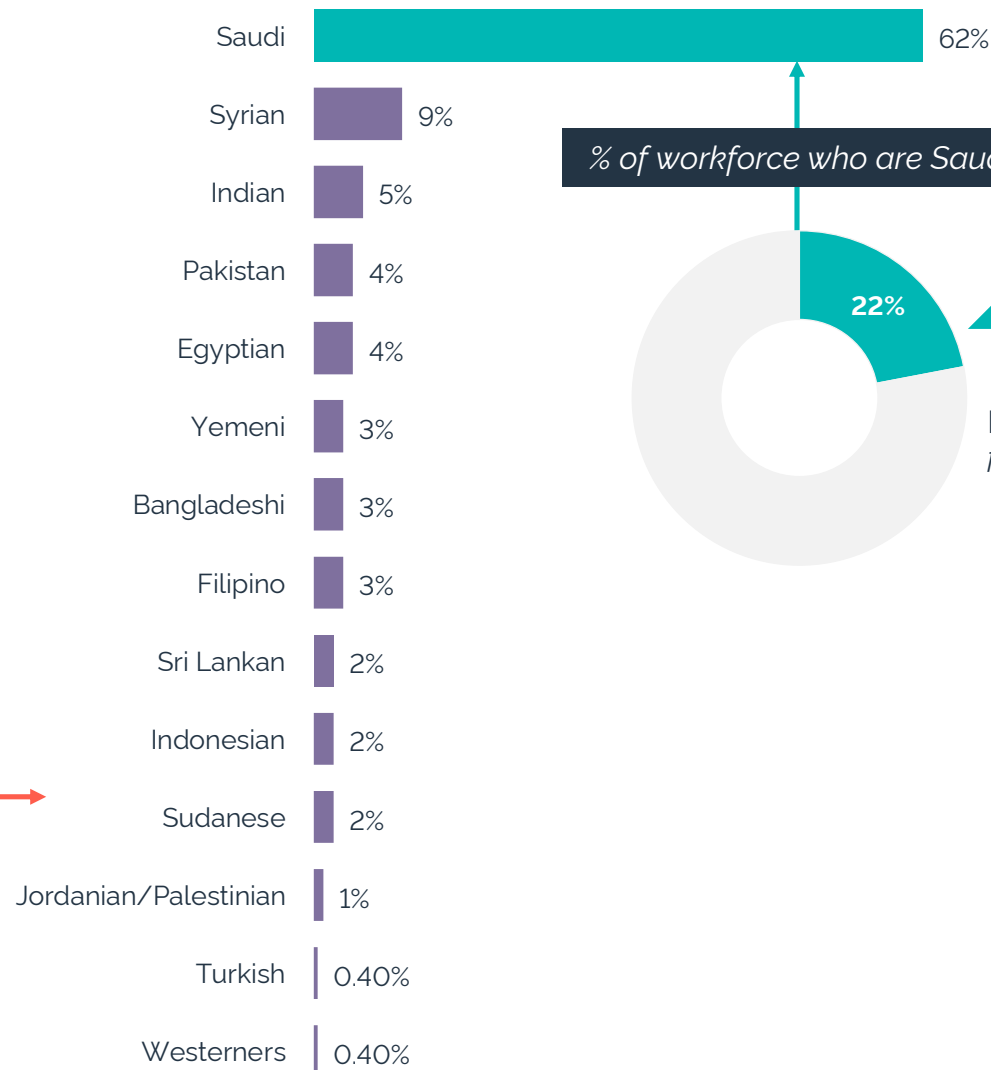
LOCATION



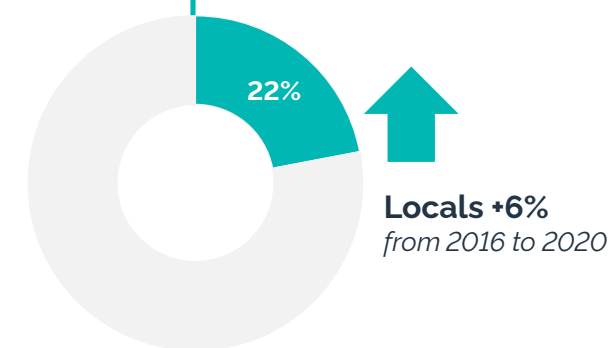
NATIONALITY



POPULATION BY NATIONALITY



% of workforce who are Saudi



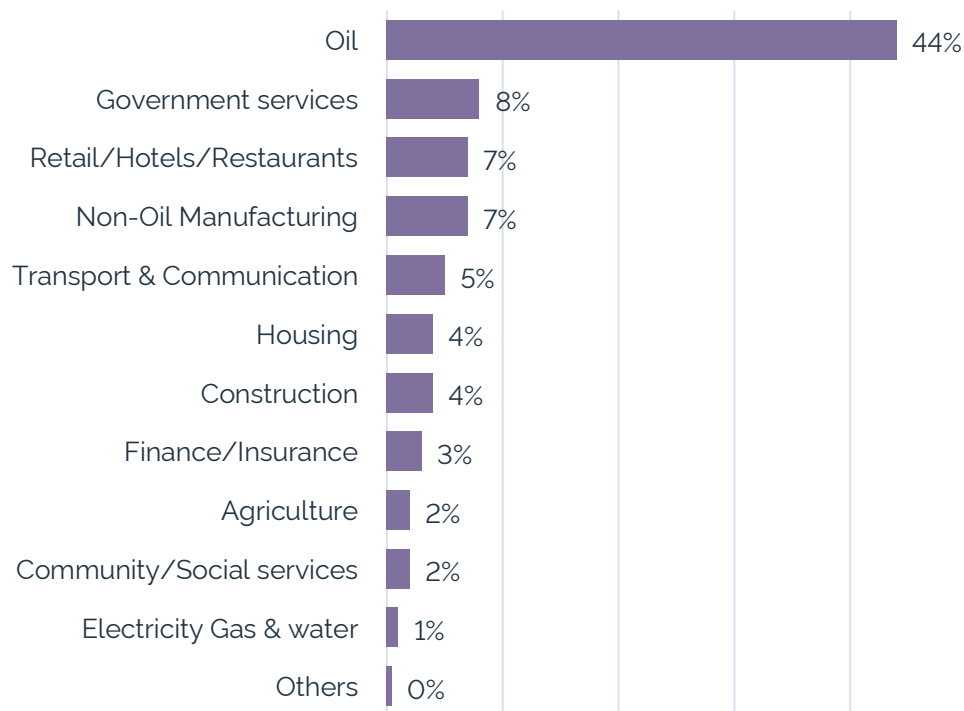
Source: Desk Research, YouGov Panel, Saudi Census

KINGDOM OF SAUDI ARABIA

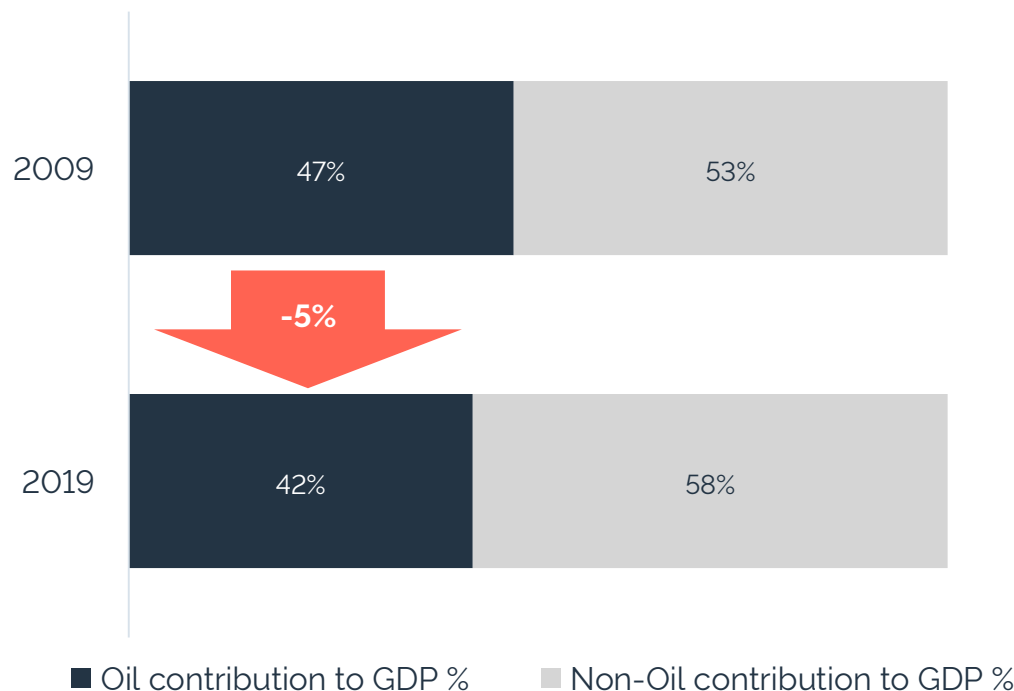
Economy

Whilst oil is the largest contributor to GDP, As part of Vision 2030, Saudi Arabia has started diversifying its economy with tourism, sports and events likely to play a larger part in the coming years.

GDP BY SECTOR



OIL VS NON-OIL GDP CONTRIBUTION



Source: YouGov Sport, Desk Research, World Bank, UN Conference on Trade & Development

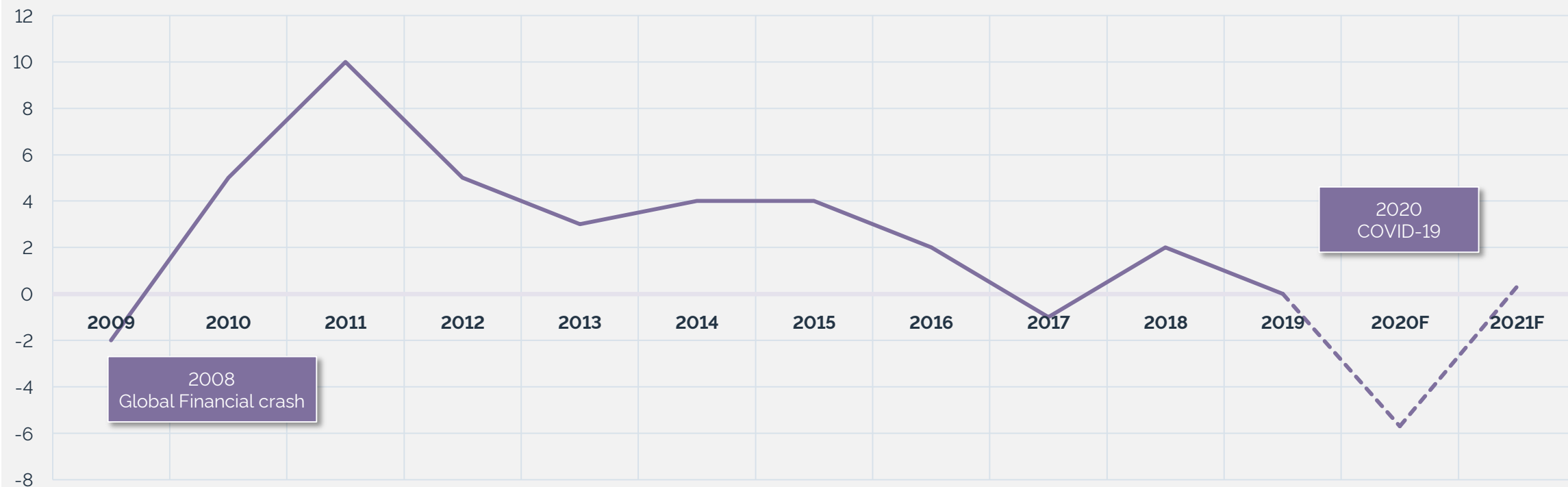
KINGDOM OF SAUDI ARABIA

Outlook

After peak growth in 2011, Saudi Arabia has experienced varied progress; the Kingdom has been highly dependent on oil and production cuts in 2017 have left their mark on development.

- The decline in 2019 will be compounded by the impact of COVID-19, in the short term.

GDP GROWTH



Source: YouGov Sport, World Bank, Reuters

KINGDOM OF SAUDI ARABIA

Sustainability in the Kingdom of Saudi Arabia

2

KINGDOM OF SAUDI ARABIA

With the aim of reducing the nation's dependency on oil, Vision 2030 was first published in 2016 and is based around 3 main goals:

SAUDI ARABIA'S VISION GOALS



A VIBRANT SOCIETY

Culture and entertainment, sports, increase Umrah visitors, double the number of UNESCO heritage sites, improve life expectancy

A THRIVING ECONOMY

Employment, women in the workforce, international competitiveness, Public Investment Fund, foreign direct investment, non-oil exports

AN AMBITIOUS NATION

Non-oil revenues, government effectiveness, household savings and income, non-profits and volunteering

All of which are based on 3 pillars:

- 1) **Saudi Arabia is the Land of the Two Holy Mosques.** Being the heart of the Arab and Islamic world is a huge responsibility and the country must grow in this role thoughtfully.
- 2) **Financial Resources:** Use Saudi Arabia's substantial financial resources to become a global investment powerhouse, stimulate the economy and diversify revenues.
- 3) **Geographical Resource:** Use Saudi Arabia's strategic location to become a global hub connecting three continents.

Source: YouGov Sport, Vision2030.gov.sa

KINGDOM OF SAUDI ARABIA

Specifically, sustainability is a key theme running through the aim of becoming 'A Vibrant Society' ...



Source: YouGov Sport, Vision 2030 National Transformation Plan

This is recognised amongst industry professionals:

'...sustainability is very important for the communities, especially now that Saudi Arabia has launched the 2030 agenda and this initiative improves society in every way'

Large Events Venue

'... the economic Vision 2030, the Kingdom was based on basic principles, among which the most important was sustainability'

Event Organiser

KINGDOM OF SAUDI ARABIA

The National Transformation Programme (NTP) is the vehicle for realising Vision 2030. The strategy is arranged around 8 clear areas which track against the UN's SDGs.



Goal – Improve Living Standards and Safety

- Improve the quality of services provided in Saudi cities
- Improve the urban landscape in Saudi cities
- Enhance traffic safety
- Reduce all types of pollution
- Improve the living condition of expatriates

Goal – Ensure the sustainability of vital resources

- Provide environmental protection from natural hazards
- Protect and rehabilitate natural landscapes
- Ensure development and food security
- Ensure sustainable access to water resources

Goal – Transform Healthcare

- Ease access to health services
- Improve the quality and efficiency of healthcare services
- Promote prevention against health risks

Goal – Social Empowerment and Non-Profit Sector Development

- Empower citizens through the welfare and social development system
- Improve effectiveness and efficiency of welfare and social development system
- Encourage volunteering
- Enhance business focus on their social responsibilities
- Support non-profit sector growth
- Enable non-profit organizations to achieve greater impact

Goal – Develop the Tourism and National Heritage Sectors

- Conserve & promote the Kingdom's Islamic, Arab and national heritage
- Develop the tourism sector

Goal – Achieve governmental operational excellence

- Improve the productivity of Government employees
- Develop e-Government
- Improve the quality of services provided to citizens
- Enhance transparency across Government entities
- Support communication channels with citizens and businesses
- Ensure Government entities' response to customers' feedback

Goal = Labour Market Accessibility and Attractiveness

- Increase women's participation in the labour market
- Enable integration of people with disabilities in the labour market
- Improve working conditions for expatriates
- Effectively attract suitable global talent

Goal – Contribute in Enabling the Private Sector

- Facilitate doing business
- Attract foreign direct investment
- Develop the digital economy
- Develop the retail sector
- Increase the contribution of small and medium enterprises (SMEs) to the economy
- Increase the contribution of productive households to the economy
- Encourage businesses' interest in sustaining the national economy

Source: YouGov Sport, Vision 2030 National Transformation Plan

KINGDOM OF SAUDI ARABIA

Developing tourism and national heritage centres: As Saudi Arabia opens itself up to the wider world, visa restrictions have been loosened and a major marketing campaign has been launched to attract international visitors, with a wide range of appealing destinations and projects.

Luxury / Entertainment Mega-Projects

Qiddiyah

Entertainment City west of Riyadh, which aims to attract 17m visitors by 2035.

Red Sea

Luxury marina project on the Red Sea. One million visitors planned by 2030.

NEOM

Planned \$500bn futuristic city in Tabuk.

Amaala

\$3bn wellness luxury tourism development on the Red Sea for 2028.

UNESCO Sites

Ad Diriyah

Birthplace of Al Saud Royal Family with \$17bn development plan.

Hail Rock Art

Two sites in Jubbah and Shuwaym is with prehistoric rock carvings.

Al Ula (Madain Saleh)

Prehistoric rock inscriptions and Nabataean ruins.

Al Ahsa Oasis

Largest Oasis near Damman (Eastern Province).

Heritage / Eco Tourism Sites

Wadi Al Disah

Valley in mountainous south-west Tabuk with Nabataean artefacts.

Farasan Islands

Red sea islands with planned annual capacity of 375,000 eco-tourists.

Souk Okaz

Redevelopment of open-air market near Taif.

Rijal Alma Village and Asir Region

Antique stone villages throughout Asir.



The aim being a ratio of 70:30 non-religious to religious foreign visitors by 2030.

Redevelopment Projects

New Jeddah Downtown

\$4.8bn project tendered by PIF for the next 10 years to redevelop Jeddah's corniche with 12,000 housing units – no contractors as of November 2019.

Riyadh's Sustainable Future'

- *Riyadh Art / Green*
- *Riyadh / King Salman Park*
- *Salman Park / Sport Boulevard*

Plans introduced in March 2019 to make the capital a more liveable and leisurely city entailing \$38bn of investments.

Grand Makkah Mosque

Vastly delayed \$10bn project introduced in 2011 aiming to expand mosque to hold 2.5m pilgrims

Jeddah and Riyadh Airports

- *(plus 5 new airports)*

Protracted plan to increase capacity of dated airports and envelop coastal aerial logistics, notably on the Red Sea.



Working to attract foreign visitors, considerable investment is being planned for more diversified destination and event offers; for sport, leisure and entertainment

Source: YouGov Sport, Castlereagh Associates

KINGDOM OF SAUDI ARABIA

SELECTED PROJECT

Planned for the first section to open in 2025, Saudi Arabia is planning a city for the future; **NEOM**, which will be “built and powered completely by renewable energy”.

A centre piece of the Vision 2030 plan, NEOM has as its aim to be a new model for sustainable living and working; focused on new standards for community health, environmental protection and effective and productive use of technology.

With sport being a central focus, Jan Paterson, NEOM's Managing Director of Sport noted “NEOM is uniquely placed to create an unrivalled sport and physical recreation ecosystem. Whether that is attracting global events for visitors and inhabitants, creating the best spectator experience worldwide in our hyper-flexible sustainable sport assets or ensuring that there is a physical activity opportunity available to all, NEOM will be a global hub for sport, uniting its communities, shaping its lifestyle and contributing to its innovative economy.”

Source: YouGov Sport , NEOM website

WITH OVERARCHING SUSTAINABLE GOALS



EXCEPTIONAL LIVABILITY

Safe and vibrant cities

An international community

Walkable cities, free of congestion

Mass transit powered by clean energy

Access to diverse landscapes: mountains, deserts and beaches

Sustainable agriculture and locally produced food

Proximity to natural open spaces within 2 km



THRIVING BUSINESS

One of the world's most attractive tourist destinations

Low conductive to a vibrant economy and society

Diverse workforce

Home to the greatest minds

Innovation hub

Rapidly advancing technology

R&D solving the world's biggest problems



REINVENTING CONSERVATION

One of the first climate positive societies

Eliminates driving as a priority mode of transport

Wise use of natural resources

Unrivalled commitment to protect and enhance local ecosystems

Incorporates nature into urban spaces

Powered by abundant low-cost, renewable energy

KINGDOM OF SAUDI ARABIA

Industry professionals' awareness:

The subject of sustainability and where it sits within the Saudi Arabian economy and future is well understood.

"The Initiative of the National Programme for Awareness and Sustainable Development ... is a national programme that raises the level of awareness about environment issues, and increasing the level of the individual and social responsibility. We call for preserving and improving it in different social classes, in addition to encouraging the volunteering efforts in this field and increase the level of environmental culture to reinforce the role of each individual as a contributor in avoiding pollution and preserving the resources."

Sport Club

"Here in Saudi Arabia we have 2020 and 2030 Visions. We have cities that are built in a way to be sustainable and depend on alternative energy and clean energy, not using plastic. They established standards for gas emissions. We have new ideas for the 2030 Vision like a clean and sustainable use for the beaches in North East of Saudi Arabia,"

Tourism Governing Body

"The 2030 Agenda Initiative implemented by the Kingdom and it is about implementing sustainability in the economy. To achieve that the Ministry of Commerce ... is making big facilities put benchmarks for sustainability for smaller ones. One of which is encourage them to follow these benchmarks. The 1st step was made by relying on many scientific methods as well as studying related guidelines, systems, initiatives and applications and implementing social responsibility on facilities and analysing important international initiatives as well as our current situation. This step ended up with important information which helped us make our national benchmarks."

Large Events Venue

KINGDOM OF SAUDI ARABIA

Sport and events in the Kingdom of Saudi Arabia

3

KINGDOM OF SAUDI ARABIA

As part of Vision 2030, Saudi Arabia intends to dramatically increase its footprint in the tourism sector through hosting a series of local and global sporting and cultural events.

Formula E



Dakar Rally



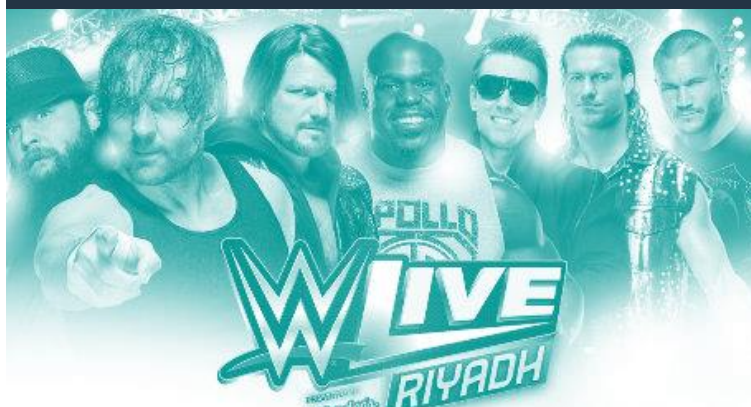
Saudi International (Golf)



Boxing



WWE



Italian Super Cup



KINGDOM OF SAUDI ARABIA

2019 was a path breaking year for Saudi Arabia as international events like Formula E, European Tour and WWE found a long term home in the Kingdom.

Key sporting events				
Event	Sport	Location	Local/International/Global	Attendee Numbers
Spanish Super Cup	Football	Jeddah	International	158,340
Dakar Rally	Motorsports	Jeddah, Al Qiddiyah	Global	120,000
Formula E Riyadh GP	Formula E	Riyadh	Global	100,000
WWE	Wrestling	Jeddah, Riyadh	Global	60,000
Kings Cup	Football	Riyadh	Local	58,223
Italian Super Cup	Football	Riyadh	International	23,361
Diriyah Tennis Cup	Tennis	Riyadh	International	15,000
Joshua vs Ruiz	Boxing	Riyadh	International	15,000
Saudi International (European Tour)	Golf	King Abdullah Economic City	Global	12,000
The Saudi Cup	Horse racing	Riyadh	Local	10,000

Source: YouGov Sport, Event websites

KINGDOM OF SAUDI ARABIA

Several multi-day, cultural events are hosted throughout the country, with planned investment in this sector the expectation is that more will have international appeal.

Key leisure events			
Event	Location	Local/International/Global	Attendee Numbers
Janadriyah National Festival	Janadriyah	Local	6,800,000
Jeddah Festival, Balad	Jeddah	Local	1,000,000
Riyadh Spring Festival	Riyadh	Local	850,000
Sharqiah Season Festival	Dammam	Local	700,000
Jazan Festival	Jazan	Local	500,000
MDL Beast Fest, EDM	Riyadh	International	400,000
Jeddah World Fest	Jeddah	Local	40,000
Winter at Tantora Festival	Al Ula	Local	40,000
Desert X	Al Ula	International	9,000
Spartan Race	Riyadh	International	1,500

Source: YouGov Sport, Event websites

KINGDOM OF SAUDI ARABIA

(1) Several large venues in the country, most of which host football matches. The Riyadh Street Circuit was established in 2018 in a 10 year deal between the Saudi Arabian Government and Formula E Holdings to host the E-Prix.

Key venues					
Venue	Location	Capacity	Built in	Main event held	Sustainability features
Riyadh Street Circuit	Riyadh	100,00	2018	Formula E	ISO 20121 certified event
King Fahd International Stadium	Riyadh	68,752	1987 (Under upgrade)	Football - Saudi Professional League	E-ticketing, LED Lighting, Disabled friendly
Kind Abdullah Sports City	Jeddah	62,345	2014	Football - Saudi Professional League	E-ticketing, LED Lighting, Disabled friendly
King Abdul Aziz Stadium	Mecca	38,000	1986	Football - Saudi Professional League	E-ticketing, LED Lighting
Prince Mohamed bin Fahd Stadium	Dammam	36,000	1973	Football - Saudi Professional League	E-ticketing, LED Lighting
Prince Abdullah al-Faisal Stadium	Jeddah	27,000	2013	Football - Saudi Professional League	E-ticketing, LED Lighting
Kind Abdullah Sport City	Buraidah	25,000	1982	Football - Saudi Professional League	E-ticketing, LED Lighting
King Saud University Stadium	Riyadh	25,000	2015	Football - Saudi Professional League	E-ticketing, LED Lighting
Prince Faisal bin Fahd Stadium	Riyadh	22,500	1971	Football - Saudi Professional League	E-ticketing, LED Lighting, Disabled friendly
Mohammed Abdu Arena	Riyadh	22,000	2010	WWE	E-ticketing

Source: YouGov Sport, Event websites

KINGDOM OF SAUDI ARABIA

(2) With non-football events planned to increase, venues are likely to be multi-purpose and built with sustainable remits.

Key venues					
Venue	Location	Capacity	Built in	Main event held	Sustainability features
Prince Saud bin Jalawi Stadium	Khobar	20,100	1982	Football - Saudi Professional League	<i>Eticketing</i>
Prince Abdullah bin Jalawi Stadium	Al-Hasa	19,550	1983	Football - Saudi Professional League	<i>Eticketing, LED Lighting, Disabled friendly</i>
King Fahd Stadium	Taif	17,000	1995	Football - Saudi Professional League	<i>LED Lighting</i>
Prince Abdul Aziz bin Musa'ed Stadium	Al Tae'e	12,250	2010	Football - Saudi Professional League	<i>LED Lighting</i>
King Khalid Sport City Stadium	Tabuk	12,000	1987	Football - Saudi Professional League	<i>LED Lighting</i>
Prince Mohammed bin Abdullah Al Faisal Stadium	Jeddah	10,000	1987	Football - Saudi Professional League	<i>LED Lighting</i>
Al Majma'ah Sports City	Al Majma'ah	7,000	1990	Football - Saudi Professional League	<i>LED Lighting</i>
GPYW Indoor Stadium	Riyadh	5,000	1997	Basketball	
King Fahd Cultural Centre	Riyadh	3,000	2000	Music concerts	
Al Maraya - Tantora Concert Venue	Al Ula	500	2018	Music concerts	<i>Sustainable materials for construction,</i>

Source: YouGov Sport, Event websites

KINGDOM OF SAUDI ARABIA

Sustainability in sport and events in the Kingdom of Saudi Arabia

4

KINGDOM OF SAUDI ARABIA

SELECTED PROJECT

Goals for sustainable development are defined at a national level, with some high-profile developments forging ahead. We look to see how this filters down to the wider industry.

Qiddiya will be a vast complex, with the aim of being Saudi Arabia's 'Capital of Entertainment, Sports and the Arts'. Planned opening is 2023.

- Located 45 km from Riyadh, the 334 square kilometre site, of which the complex will cover 30% of the land. The rest will be dedicated for natural conservation.
- Some of the entertainment facilities at Qiddiya will include training academies, desert and asphalt tracks for motorsports enthusiasts, water and snow activities, outdoor adventures and safaris.
- This will include a Formula One motor racing track, 20,000-seat stadium and Six Flags theme park.
- The complex will include a range of retail, residential, community services and commercial support facilities.

In addition to the overarching sustainable goals: to deliver against Vision 2030, Qiddiya aims to promote:

**BIODIVERSITY****MICROCLIMATE
CREATION****WASTE
MANAGEMENT**

Source: YouGov Sport , Qiddiya website

KINGDOM OF SAUDI ARABIA

SELECTED PROJECT

Some events, such as the Jeddah Summer Festival focus on sustainability within the local community.

The Jeddah Summer Festival concentrated on the local workforce and businesses in 2019.

- > This event also encourages the use of public transport by offering free bus rides to and from the venue.
- > Jeddah's 41-day Sea and Culture festival features international shows and plays was presented for the first time in Saudi in 2019.

Clear aims of the festival ...



**BOOSTING THE
LOCAL ECONOMY**

Boosting the local economy by encouraging partnerships with local businesses



**GENERATING
JOBS**

20,000 jobs and volunteering opportunities for local youth

Source: YouGov Sport, Jeddah Summer Festival website

KINGDOM OF SAUDI ARABIA

Leading by sustainable example in international sport & events:

Most industry professional had knowledge of events with sustainable initiatives in sport from around the world.

INTERNATIONAL EXAMPLE

"La Liga Championship, the Open Tennis Tournament. It is one championships that uses the methods of sustainability with design and components, dependence on natural energy and use of substances that reduce environment damage till it becomes virtually non-existent ..."

Large Events Venue

INTERNATIONAL EXAMPLE

"The English Tournament of football; they implement sustainability since the past 10 years."

Major Events

INTERNATIONAL EXAMPLE

"... World Wrestling Federation, so world, American, Canadian wrestling. This company is essential since it manufactures wrestling rings in a sustainable way, such as the Riadi ring from last season, it has world qualifications.

The company always finds an alternative, ..process barriers instead of plastic ones, the lighting was eco-friendly....they came up with a new idea, :paper boxes, that contains the beverage or the meal that the audience might order... and everything gets recycled the same day"

Large Events Venue

INTERNATIONAL EXAMPLE

"La Liga ... we see constant improvement in this league in terms of sustainability measures ... packing the recyclable waste, organising terraces to avoid crowds Transportation. They were also pioneers in using digital boards instead of manual ones."

Sport Club

INTERNATIONAL EXAMPLE

"I know about AFC Championship. Sustainability is used in stadium design, recycling waste, energy diversification and reducing the use of plastic a lot."

Event Organiser

INTERNATIONAL EXAMPLE

"I remember that one year, in the final match of American football I noticed that American football was focussed on sustainability.. In the match, an initiative was launched.. It was in Florida one of the its goals was cleaning the beaches, reducing waste and recycling. It was really great initiative and it was focused on preserving the environment and reducing the emission of hydro carbon in all sports events."

Large Events Venue

GLOBAL EXAMPLE

"There were the Olympic Games in London in the summer of 2012... several things like the transition to clean energy, public awareness, environmentally friendly transportation and emissions reduction."

Sport Ministry

KINGDOM OF SAUDI ARABIA

Leading by sustainable example in local events:

Every industry professional had knowledge and examples of local companies involved in sustainable initiatives in sport and events.

"Raya Company has a great experience and depends on method of sustainability ... they have environmentally friendly solutions, waste treatment, replacing harmful substances with environmentally friendly materials and qualifying the use of natural resources in their work."

Event Organiser

"There was a company called Heights in Saudi Arabia. It is a leading company in event management. I remember that it organised rally event and Formula E, which they implemented sustainability in them."

Major Events

"Al Ertikaz Almasi Trading Co., a Saudi company, in the field of organising sports events. The company is one of the most important companies in the field of sustainability practices Provides a range of options to its clients, including the heat-resistant polygon tent and natural weather factors. The company also provides the eco-friendly portable toilets and desks. The toilets are solar powered."

Large Events Venue



"Delta Management activities for events and occasions ... in Saudi Arabia I think she uses sustainability in all her business They have the use of solar energy in their events and reduce the petroleum resources remarkably. Switching business to digital in selling tickets attendance. And using smart things for seats so they don't waste their time."

Large Events Venue



KINGDOM OF SAUDI ARABIA

Single use plastics:

Replacing single-use plastic with biodegradable products has been a national and municipal focus over the past few years.

"I know The Initiative of Jeddah Secretariat, which consists of recycling 20% of plastics, in collaboration with MEPA about 3 years ago, in partnership with The Saudi Environmental Society for the transformation of plastic industries and reducing harmful impacts."

Large Events Venue

"An initiative that took place around 3 years ago, by the local municipalities and provinces, which is using biodegradable plastic. Today, the biodegradable plastic is found in supermarkets and grocery stores, like biodegradable plastic bags the bags are for daily use and biodegradable."

Tourism Governing Body

"The initiative of the Environmental Island of Saudi Arabia...was the first of its kind in the region to recycle plastic waste into organic industry, in partnership with the General Authority for Preserving the Environment."

Sport Club

"There have been multiple initiatives such as the one of the Holy Capital and Hajj camps."

Large Events Venue

"There are many events that eliminated the single use plastics. One of these initiative is found in the municipalities of Saudi Arabia. They use biodegradable single use plastic. Also during Jeddah Spring Festival."

Major Events

"There is the initiative of the Ministry of Commerce in 2018 in collaboration with the municipality to use plastic that is decomposable and it became an important condition in commerce to reduce the harm caused by plastic."

Large Events Venue



> Perhaps some confusion over who is driving each initiative

KINGDOM OF SAUDI ARABIA

Sustainable initiatives in practice:

Active sustainable remits and practices appear to be well entrenched in the Saudi events industry – from supplies to training and awareness.

"Al Wehda Club... All the stadiums are equipped with the latest technologies. ... (focus points). To attract companies that have expertise in applying sustainability with a contract to make changes, train people and find solutions."

Sport Club

"We use solar system, reducing the use of plastics, waste treatment, digitisation instead of traditional in counting the seats ... by providing training and qualification advice and financial support from the government."

Large Events Venue

"We are currently seeking to apply sustainability measures. We have established a specialised department with competent employees to attain sustainability. We also organise training courses. I should note that we have almost banned, for the past years, plastics and all harmful materials."

Large Events Venue

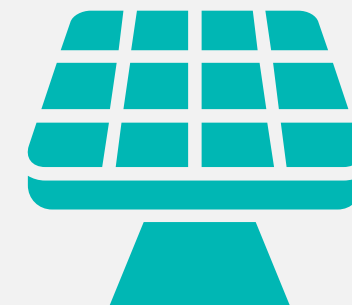
"Sustainability for us is essential for our work; starting from the designs in engineering to development. We don't just focus on executing we're also interested in development. We always renovate whether it is on a local or global scale. We also have studies conducted on everything we use, we study our projects and look for anything that is new. For instance, We reduced using plastic a great deal, the use is almost null, and we work with a lot of countries because we use good material,"

Large Events Venue



"Most our work about in organising events and conferences and crowd managing and stadiums we don't use any kind of paper ... there is no need for it. We use recycled plastic when it comes to food and beverages. We also work with companies specialised in sustainability. We sign long term contracts with them that include training and giving instructions to the crowd."

Large Events Venue



KINGDOM OF SAUDI ARABIA

Importance of sustainability:

Sustainability is more than just a concept, it appears to be well understood – from drivers to solutions.

> Everyone interviewed had views on how and where it should be applied

"It is very important now and in the distance future, especially in the field of sports and every day is getting more important... the viewpoint of sustainability in the field of responsible business management that results in positive numbers on the economic, environmental and social levels."

Sport Ministry

"Sustainability is a very important matter. It is a concern of all big companies in society. They try to implement sustainability and be a part of this movement in many industries like tourism, sports and others... we suffer a lot due to the side effects of huge events such as festivals, they produce large amounts of wastes and emissions. This affects the attendees, they receive harmful gasses."

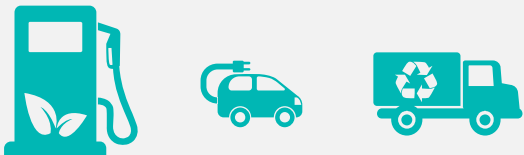
Tourism Governing Body

"It is very important, with an increase in awareness regarding the climate and the pollution of the environment, it is becoming essential. It also helps reduce the environmental damages from hydro plastics and gases, especially in sports and social events."

Large Events Venue

"Sustainable practices are important, especially for the future generations. Now sustainability has become an essential part of life and a lifestyle.... This requires a permanent solution from us, especially during the fast pace of construction in the tourism and events industry."

Major Events



KINGDOM OF SAUDI ARABIA

Relevance of event size:

Whilst there is an overriding feeling it is essential that large events employ sustainable initiatives, there is clear acknowledgement these should be applied across the board.

"I think that we should pay attention on the sizes of the events and establishing access to sustainability measures with all sizes and types."

Large Events Venue

"The bigger event is, the more it is important to apply sustainability measures. But of course the small events should apply sustainability as well. The bigger the audience is the more necessary it is to have sustainability measures."

Sport Club

"I don't think it's important, because the way sustainability works, small events are way more important than big ones, because we start off from the small ones The big events are easier to implement sustainability. I mean, there's always small events compared to the big ones happen years apart such as car races or wrestling matches.... I think we should focus on small events ... as they happen more frequently."

Large Events Venue

"Sustainability measures must be implemented in all events. In big events they must implement sustainability more. As the size of the events increases, sustainability becomes more a necessity for the environment ..."

Major Events

"All events, small or big, implement sustainability the same. When it comes to spreading awareness small events are even better."

Large Events Venue

"... It is important in order to get the wanted results. No matter the size of the event, the objectives are the same."

Large Events Venue



KINGDOM OF SAUDI ARABIA

Accreditation:

The ISO 20121 accreditation is well understood and considered crucial when contemplating sustainable initiatives – all industry professionals were well versed in examples.

- > ISO 20121 is widely known and understood in Saudi Arabia
- > Also believed to be very relevant in the Middle East to recognise the efforts and achievements driven by country Visions

ISO 20121

"I know that ISO presents certificates and it manages sustainability The Ministry of Tourism in Saudi Arabia (is certified). It is strongly relevant to the sports and events industry. We provide services to the audience directly. Therefore, they should work fast on getting ISO certificate to ensure the quality of the sustainability practices."

Major Events

"ISO 20121 is like an official certificate, it determines whether or not you are credible. It is the only certificate accredited by the ministries. I think it is very important."

Large Events Venue

"It is a benchmark for sustainability for facilities that implement its ways. There is the Malek Fahd Stadium in Riyadh. It is very relevant, the certificate documents the facility's works in sustainability and puts the benchmarks for it."

Large Events Venue

"Yes, I know it. King Faisal Sports City in Jizan (is accredited)... It provides officially recognised standards and certification, to apply sustainability methods, develop solutions and training."

Large Events Venue

"ISO certification is highly relevant in the Middle East. It represents a green card for the good work. ISO is an entity empowered to evaluate the company's work and to guide it towards the right path in implementing the sustainability according to the globally approved standards. ... King Abdullah Economic City (is certified)."

Large Events Venue

"I believe that it is 20121 inspired by the London Olympics, it is BS 8901. it achieved great success at the time. It is highly relevant. When managing the audience in the National Sports Association, it needs the sustainability system because it is used in events where there is a large amount of people, whether it is on a regional or global level, the standards should be according to the sustainability system."

Tourism Governing Body

KINGDOM OF SAUDI ARABIA

Measurement:

General agreement on the importance of measuring sustainable initiatives. However, some debate on whether benchmarks should be fixed (a framework within which country economic development has weighting).

> ISO 20121 is considered the tool for measurement

MEASUREMENT

Large Events Venue

"I think there is an analysis of data and information and its comparison with the previous ones. The ecosystem comparison can measure the height and percentage of the installation. ..ISO is worthy of standards and metrics for sustainability methods."

"It should be the same for everyone."

Sport Ministry

"It certainly differs from one country to another.... The essence will be unified in the countries of the Middle East, different from Europe in terms of climate, temperature and means of transportation."

Large Events Venue

"It should be measured on an environmental scale, The measurement should be based on the annual performance index and the growth sustainability scales. ... The benchmarks should work on doing comparisons between e usages of petroleum products and their chemical, petrochemical effects. We should reinforce the work on achieving sustainability through certifications, like ISO... ."

"Benchmarks should be the same and constant, while taking into consideration certain countries lacking certain natural resources and wealth. These countries need support and solutions, paving the way for them to follow the same benchmarks."

Sport Club

"Setting the rules for the sustainability regularly. Setting a percentage of the criteria of environment change, in addition to evaluating sustainability... I think that ISO is the one who sets criteria and measure of sustainability, and it coordinates with important organisations to set these measures"

"They shouldn't be stable but they should align with the general headlines of sustainability to ensure coordination..."

KINGDOM OF SAUDI ARABIA

Challenges for sustainability:

Despite the high levels of knowledge and existing sustainable remits amongst industry professionals, financial support and executive buy-in are still challenges.

"Cost is the main problem, unifying benchmarks and the implementation of sustainability is hard, because each country has its own situation."

Large Events Venue

"The most important points in my opinion are financial ability and executive capacity. Whether the internal implementation companies have a lot of experience, or if they can use external companies as well."

Event Organiser

"I want to discuss that small and medium enterprises need financial support so that they can become sustainable. It needs financial reconstruction, which needs support that could reach 40% or 50% of the capital value of the company. It could be governmental initiatives of providing load to increase the level of work efficiency of sustainability."

Tourism Governing Body

"It is difficult to implement changing the cruise ships and using sail ships instead. It is difficult because the consumer does not accept the idea. This is because the length of the cruise will become slower and the situation is different from regular cruise ships that use huge generators."

Tourism Governing Body

"I believe everything is easy to implement except the change to alternative energy.... It depends on the weather here in Saudi Arabia; clean energy is a restriction for us, because of the air conditioning. We could use big electric generators that run on fuel, but we deal with an Italian company to cut emissions and sediments by half."

Major Events

"Infrastructure is the toughest because implementing it and changing it is going to need time and it will cost a lot."

Large Events Venue



KINGDOM OF SAUDI ARABIA

Conclusions

5

KINGDOM OF SAUDI ARABIA

Nudge, push or pull?



"They should incorporate new materials that are environmentally friendly, They should also train the workforce on how to use these new materials, in addition to recycling the materials currently being used. This process takes time depending on the research of the workforce.... This process needs a budget that includes the sustainability practices, training the workforce and raising awareness among the audience."

Major Events

KINGDOM OF SAUDI ARABIA

Conclusions

A high degree of awareness and implementation at the local level. High profile sustainable initiatives are part of the future Vision 2030.

- > High awareness and knowledge of sustainability and how it is and will should incorporated in to the Saudi Arabian landscape over coming years.
- > High sustainability remit amongst industry professionals – already incorporating practices, materials and methodologies in to work.
- > Some are aware of the gap between the vision and what is needed to achieve this under the national level (ie industry) :
 - *Requires governmental support and guidance (both financial and practical)*
- > Understanding that awareness amongst the general population needs to improve and in order to achieve a balanced environment, sustainability must become part of lifestyle (push), rather than just education
 - *It cannot be just something that makes experiences more expensive*

Recommendations

All eyes are on Saudi Arabia as it develops plans to open up to the world; with great plans for sustainable 'future cities' and destinations.

- > As Saudi Arabia continues to attract international interest as host for sport and entertainment events, awareness of the 'real' country will widen
 - *This should be used as a platform for good and for raising awareness of sustainability both home and abroad*
- > Cohesion between the country Vision 2030 and industry level initiatives requires more framework and guidance
 - *Financial support will be crucial*
- > 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*

YouGov[®]Sport

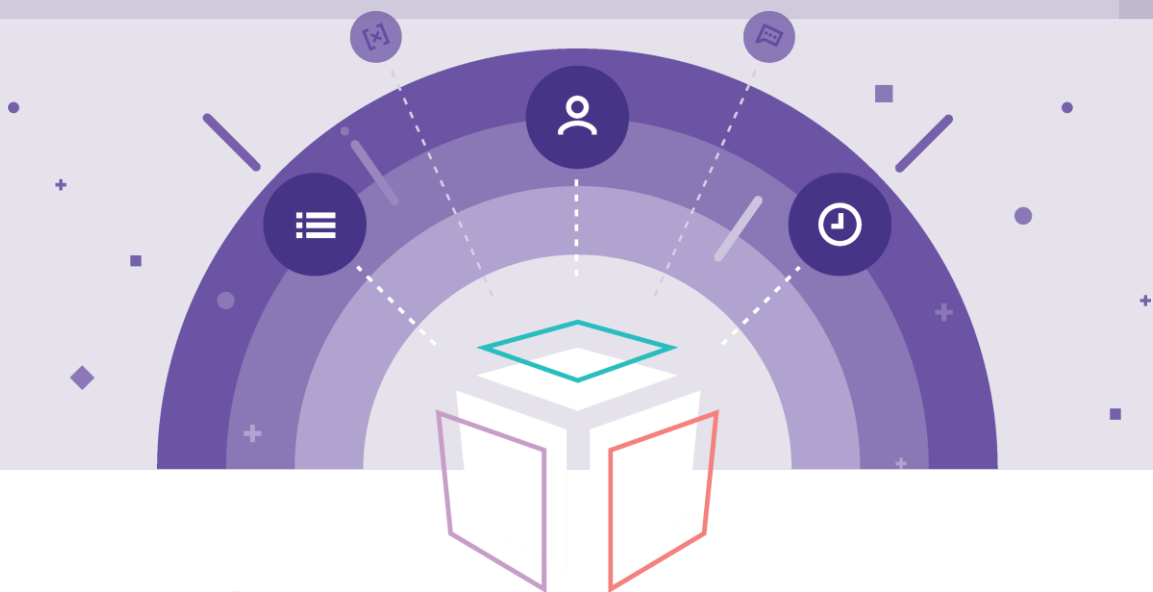
We are a global sports, sponsorship and entertainment research company, working with the industry's key players to unlock meaningful, actionable insights.



Founded as SMG Insight, YouGov Sport is an integrated division of YouGov – one of the world's largest and most respected research firms.

©YouGov | No part of this document may be copied or distributed in any form or by any means, including photocopying and email, without the prior written permission of YouGov plc or any of its subsidiary companies. Written permission must be obtained before any part of the report is stored on any retrieval system. | All rights reserved

Disclaimer | The opinions, conclusions, projections, evaluations and estimates in this YouGov Sport report are based on extensive experience in media, sports, sponsorship and consumer research industry. However, whilst great care has been taken in the preparation of this document, we cannot guarantee the accuracy of the information contained herein and disclaims all liability for any loss or damage from reliance thereupon.



YouGov was founded in 2000 on the principle that online surveys represented a better way to accurately assess public opinion.

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