

## Oman

Sustainability in the sports, events and tourism industries in Oman



## CONTENTS

BACKGROUND & OBJECTIVES

METHODOLOGY

- 1 COUNTRY OVERVIEW
- 2 SUSTAINABILITY IN OMAN
- 3 SPORTS, EVENTS & TOURISM IN OMAN
- 4 SUSTAINABILITY IN SPORTS, EVENTS & TOURISM
- 5 CONCLUSIONS & RECOMMENDATIONS

## CONTACT

Sara Eddleston  
Head of Sport Consumer

T: +44 7384 832 212

E: [sara.eddleston@yougov.com](mailto:sara.eddleston@yougov.com)

O M A N

# Key Areas of Exploration

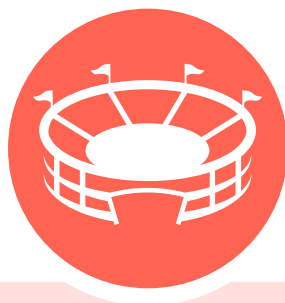


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in Oman.

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



Sustainability and its position  
in Oman



Sports, events & tourism  
in Oman



Sustainability within sports,  
events & tourism



O M A N

# 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 Oman

## DESK RESEARCH

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

O M A N

# Oman Country Overview

**1**

# Oman

Off the south-eastern coast of the Arabian Peninsula, Oman is the only GCC country located outside the Gulf. Leveraging this position, Oman has focused on being a global logistics hub. The majority (85%) of the population is urban based, with 50% in the capital, Muscat.

## 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, World Bank

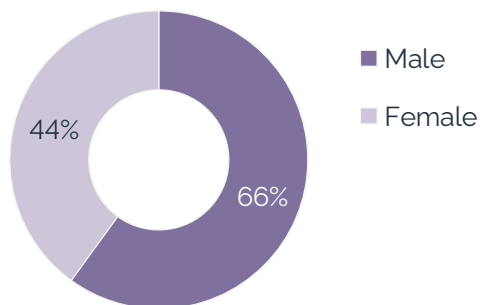


OMAN

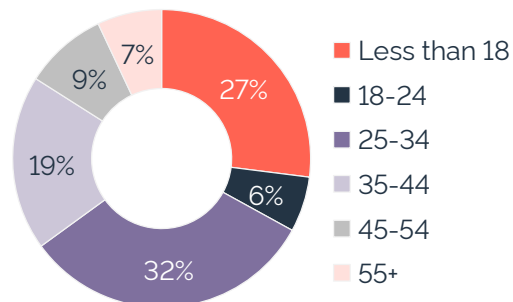
# Its people

The Omani population is skewed towards younger males and slightly more likely to be local. In 2018, a push on Omanisation had some effect, however, Indians and Bangladeshis dominate the workforce, with locals accounting for one fifth.

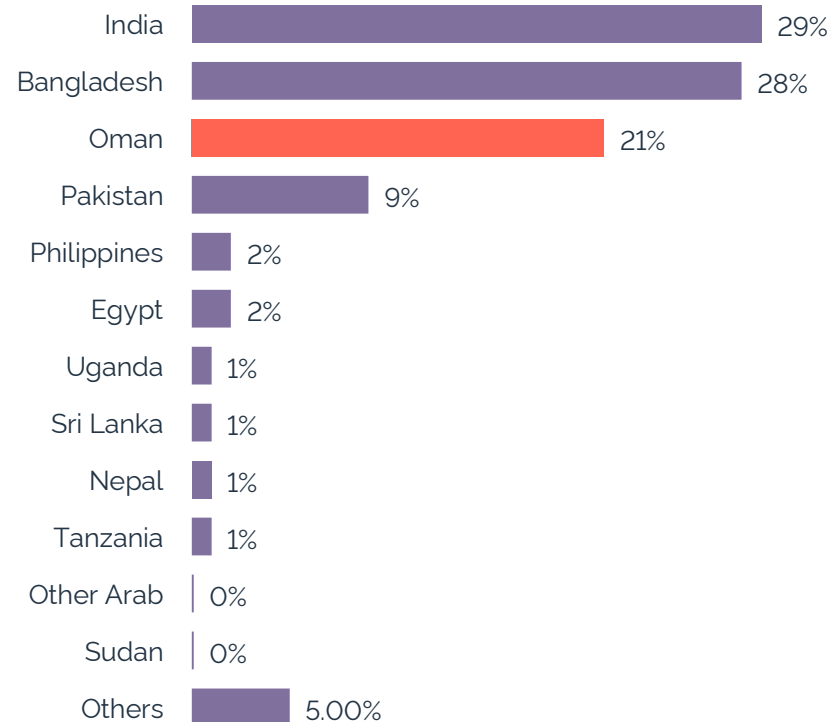
## GENDER



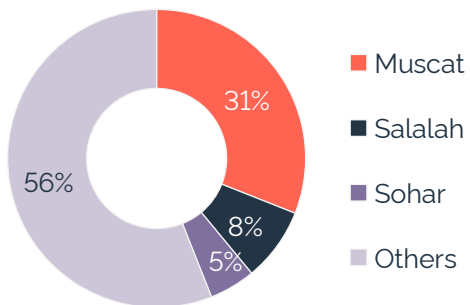
## AGE



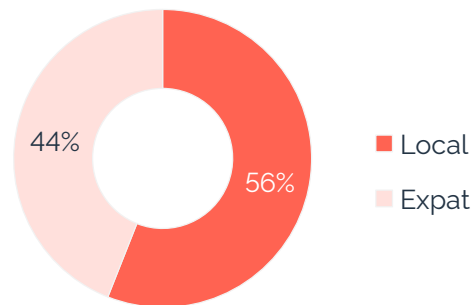
## WORKFORCE BY NATIONALITY



## LOCATION



## NATIONALITY



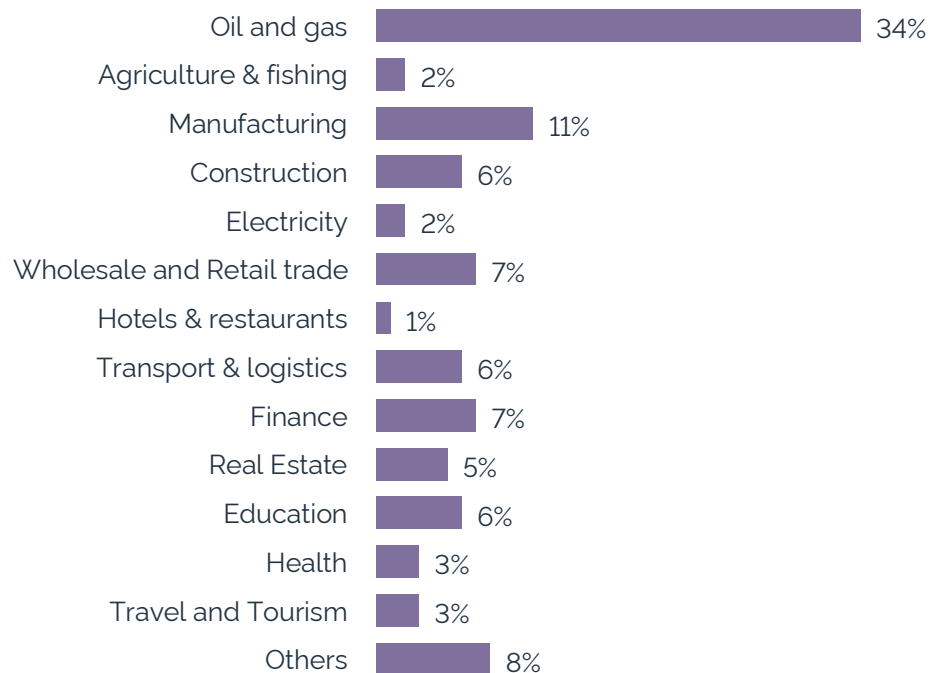
Source: Desk Research, YouGov Panel, National Centre of Statistics & Information

## OMAN

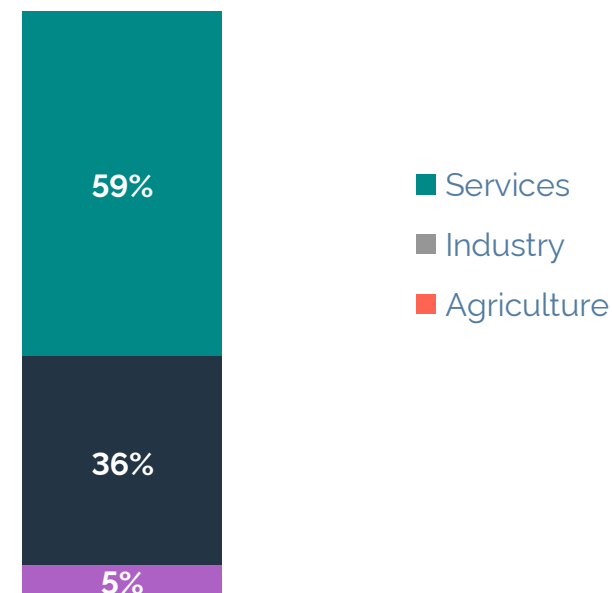
# Economy

Although oil and gas contribute the largest proportion to the economy, Oman possesses one of the weakest oil and gas reserves in the region. Diversification has long been on the agenda (since 1995) and services now account for the majority of GDP and employment.

GDP SPLIT BY SECTOR – 2019



EMPLOYMENT SPLIT BY SECTOR – 2019



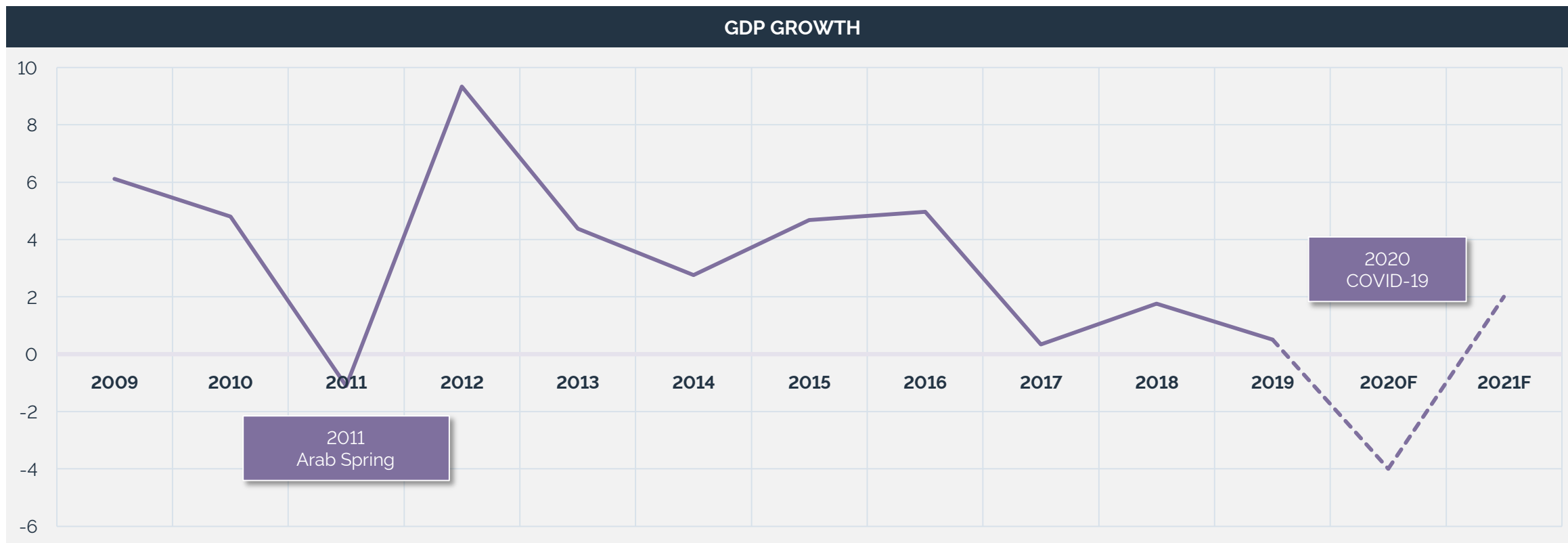
Source: Desk Research, World Bank, Nordea



OMAN

# Outlook

Oman has experienced volatile growth since the Arab Spring in 2011. The challenges set by the slump in the price of oil in 2014 with Oman's recorded all time high production in 2015 have had a significant impact; fiscal deficit swelled, fuel subsidies were slashed and infrastructure projects delayed as it pursued austerity measures. The onset of COVID-19 worldwide has further compounded this situation, however, growth is expected to return in 2021.



Source: Desk Research, World Bank, Fanack.com

OMAN

# Sustainability in Oman

2

## OMAN

Since 1995 and the launch of Vision 2020, Oman has pursued its strategy for diversification. This was boosted in 2016 by The National Programme for Enhancing Economic Diversification (Tanfeedh) plan for accelerated development.



## TANFEEDH

- > A facilitating programme placing greater emphasis on involving both public and private entities
- > Ensures both groups efficiently implement the government's economic diversification strategy
- > Identifying KPIs alongside the responsibilities, resources and timeframes needed for diversification
- > Provide regular progress reports

MANUFACTURING

LOGISTICS

TOURISM

FINANCE

EMPLOYMENT



## OMAN VISION 2020

- > Economic and financial stability
- > To reshape the role of government in the economy and broadening private sector participation
- > Diversification of the economic base and sources of national income
- > Globalisation of the Omani economy
- > Upgrading the skills of the Omani workforce and developing human resources

Source: Desk Research, Al-Wahaibi 2016, Deloitte, Oxford Business Group

## OMAN

Moving forward, Vision 2040 builds on the previous 20 years by focusing on innovation, equal opportunities and a healthy public-private sector partnership. The strategy is based on 4 pillars:

- 1) Vision 2040 was created with participation and input from various entities: governmental, private sector, civil society organisations, academic institutions as well as the citizens of Oman
- 2) Sustainability is a key objective and a common theme through all pillars

### OMAN'S VISION 2040 PILLARS



#### PEOPLE AND SOCIETY

- > Developing national technical & entrepreneurial capabilities
- > Enhance family & community health and well-being
- > Uphold the Omani identity & heritage

#### ECONOMY AND DEVELOPMENT

- > Ensure balanced Governates' development
- > Build world class infrastructure & liveable cities
- > Creating wealth through economic diversification & private sector partnership
- > Preserving environmental sustainability

#### GOVERNANCE AND INSTITUTIONAL

- > Improve governance effectiveness and the Rule of Law

#### ENVIRONMENTAL AND NATURAL

- > Effective ecological systems which have flexibility to protect the environment and sustain natural resources and support the national economy

Source: Desk Research, First Voluntary Review of the Sultanate of Oman

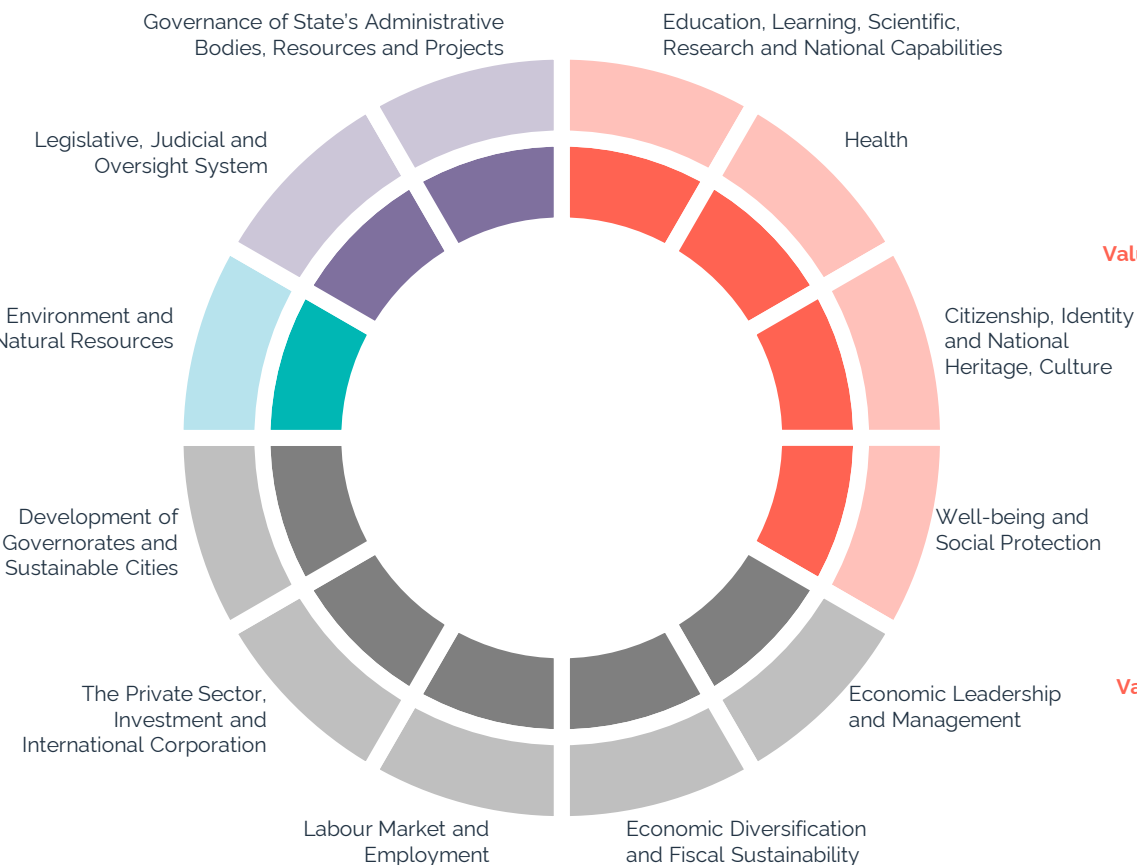
OMAN

Specifically, the 4 pillars encompass 12 national priorities which combined, have definitive targets:

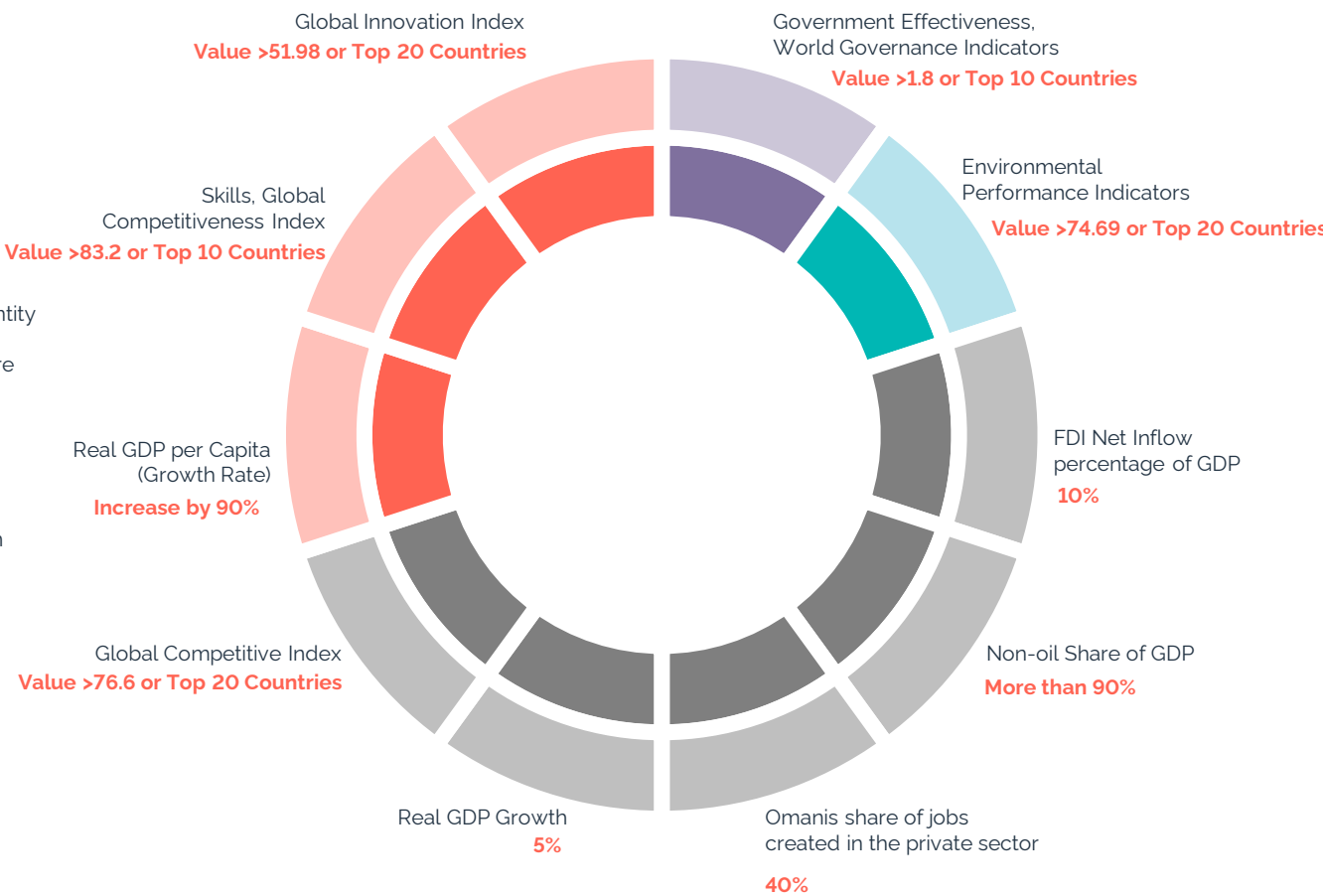


> Each target objective also has interim 2030 targets

12 NATIONAL PRIORITIES



2040 TARGETS



Source: Desk Research, First Voluntary Review of the Sultanate of Oman



## OMAN

In turn and to align with a global strategy, Oman's national priorities have also been mapped against the United Nations SDGs. Here People and Governance goals.



Education, Learning, Scientific Research and National Capabilities	
SDG #	Goal
3	Good Health & Well-being
4	Quality Education
7	Affordable & Clean Energy
8	Decent work and economic growth
17	Partnerships for the Goals

Health	
SDG #	Goal
3	Good Health & Well-being
5	Gender Equality
6	Clean Water and Sanitation

Citizenship, Identity and National Heritage and Culture	
SDG #	Goal
1	No Poverty
5	Gender Equality
10	Reduced inequalities
11	Sustainable Cities & Communities
14	Life Below Water

Well-being and Social Protection	
SDG #	Goal
1	No Poverty
2	Zero Hunger
3	Good Health & Well-being
5	Gender Equality
11	Sustainable Cities & Communities
14	Life Below Water
15	Life on Land

Legislative, Judicial and Oversight System	
SDG #	Goal
16	Peace, Justice & Strong Institutions

Governance of State's Administrative Bodies, Resources and Projects	
SDG #	Goal
16	Peace, Justice & Strong Institutions
17	Partnerships for the Goals

Source: Desk Research, First Voluntary Review of the Sultanate of Oman

OMAN

Oman's national priorities have also been mapped against the United Nations SDGs. Here Economy and Environment goals.

Economic Leadership and Management	
SDG #	Goal
8	Decent work and economic growth
9	Industry, Innovation & Infrastructure
12	Responsible Consumption and Production
16	Peace, Justice & Strong Institutions
17	Partnerships for the Goals

Empowered Private Sector	
SDG #	Goal
5	Gender Equality
8	Decent work and economic growth
17	Partnerships for the Goals

Economic Diversification and Fiscal Sustainability	
SDG #	Goal
5	Gender Equality
7	Affordable & Clean Energy
8	Decent work and economic growth
9	Industry, Innovation & Infrastructure
12	Responsible Consumption and Production
16	Peace, Justice & Strong Institutions

Development of Governorates and Sustainable Cities	
SDG #	Goal
8	Decent work and economic growth
10	Reduced inequalities
11	Sustainable Cities & Communities
14	Life Below Water
15	Life on Land

Labour Market and Employment	
SDG #	Goal
4	Quality Education
5	Gender Equality
8	Decent work and economic growth
9	Industry, Innovation & Infrastructure

Environment and Natural Resources	
SDG #	Goal
4	Quality Education
6	Clean Water and Sanitation
7	Affordable & Clean Energy
11	Sustainable Cities & Communities
12	Responsible Consumption and Production
13	Climate Action
14	Life Below Water
15	Life on Land

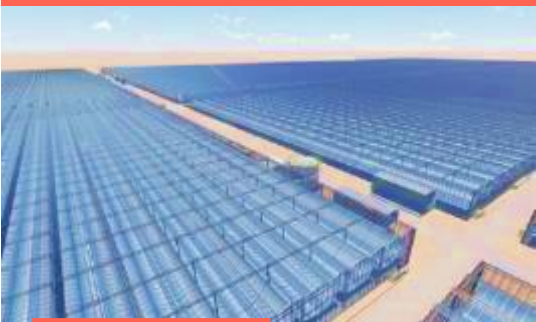
Source: Desk Research, First Voluntary Review of the Sultanate of Oman

## OMAN

### SELECTED PROJECT

**Renewable energy:** Keen to achieve a minimum of 10% contribution to the country's energy requirements from renewable energy resources by 2025, several initiatives are in motion.

#### Miraah Solar Power Plant



Past 2025, Oman plans that renewable energy sources will generate 30% of its electricity demand by 2030.

#### Ibri Solar Power Plant



Currently, there are several large-scale solar projects in the pipeline: Ibri, Manah and Adam.

#### Dhofar Wind Farm



Opened in 2019, the Dhofar Wind Farm is a step forward for Oman's diversification into renewable energy.

- > Developed and financed by Abu Dhabi based Masdar and Abu Dhabi Fund for Development respectively
- > The project, first of its kind in Oman aims to power 16,000 homes in the Dhofar governorate
- > With aims to offset 110,000 tonnes of carbon dioxide emissions annually
- > Other projects include those in Al Jazer, Sadah, Jaalan Bani Bu Ali, Al Halaniyat, Shaleem and Sur

Source: Desk Research, International Finance.com, Trade sites

## OMAN

## SELECTED PROJECT

**Oman Environment Day – 8th January:** An annual countrywide event that then continues throughout January to raise awareness of the importance of protecting the environment and preserving the natural resources of the country.

**Publishing easy tips**

Oman Observer (selected)

- > Do not throw away water you can use to water plants
- > Put a bucket under dripping air conditioning unit and use the collection to water plants
- > Say 'no' to plastic bags
- > Buy re-usable canvas bags
- > Play an active role in keeping your town clean. Help keep local beaches or wadis clean by clearing up your own mess.

**Beach cleaning – Al Seeb Beach**

**Initiatives engage the entire nation:** public and private companies and the community.

**2020 Local Initiatives – Duqm****Tree Planting**

- > Members of the Omani Woman Association, together with school students planting around 431 trees in Duqm Public Park. The initiative aimed to promote awareness among students on the importance of preserving the environment and introducing more environment-friendly initiatives.

**Tree Planting**

- > Businesses operating in the Special Economic Zone at Duqm and community joined forces to plant 600 Casuarina trees in the Middle industries zone at the Port of Duqm.




Source: Desk Research, Oman Observer, The Arabian Stories



## SELECTED PROJECT

**SustainableOman:** Was established in an effort to help the Omani audience recognise the role of individual action in achieving the UN SDGs; to help the general population understand and engage with the nation's plan.



**WHAT WE DO**  
We are powered by a community of sustainability practitioners and advocates

PLATFORM	KNOWLEDGE BANK	NETWORK
For every citizen and resident of Oman to show their commitment to achieve the SDGs.	We provide actionable knowledge and other resources.	We encourage connections and collaborations. We can have more impact, if we work together.

FORUM	SIMPLIFIERS	OMANISATION
Engage in a conversation to share knowledge, experience and expertise.	Sustainability is a big word, we strive to make it easily understood.	Actions are customised to Omani environmental, social and cultural settings.

17 SDGs	169 Targets	11 Governorates	61 Wilayat	2.73 Mn Citizens	1.77 Mn Expatriates
---------	-------------	-----------------	------------	------------------	---------------------

**Actions include ...**

- > Instructive articles
- > Resources
- > Webinars
- > Competitions
- > And more ...



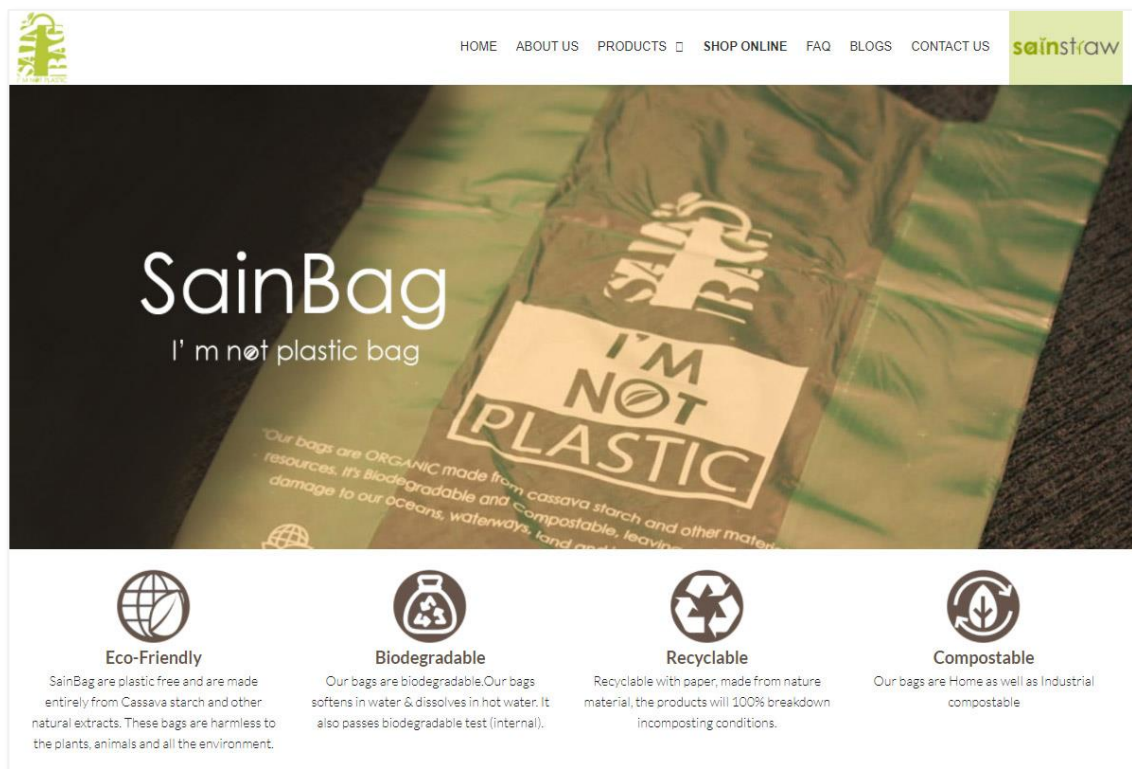
Source: Desk Research, Oman Observer, SustainableOman.com



OMAN

SELECTED PROJECT

**Single-use plastic solution:** SainBags is an Indonesian-Omani company, established in 2018 with a mission to provide an alternative to plastic bags.



# I' M NOT PLASTIC

**"Clean & Green is our Perfect Dream"**

**With a growing portfolio of products, all are produced using eco-friendly materials.**

- > "Our bags are ORGANIC made from cassava starch and other materials from renewable resources. It's Biodegradable and Compostable, leaving no toxic residues, causes no damage to our oceans, waterways, land and is HARMLESS to animals and plants"



Source: Desk Research, Oman Observer, Sainbags

## OMAN

**Industry professionals' awareness:**

Every industry professional interviewed in Oman had a good understanding on sustainability.



"Everyone knows about sustainability, it is an important matter especially nowadays, we reached a point where the planet is very damaged and we're damaging it unknowingly because of the factories and the excessive amount of cars which is really damaging the planet.

To a point that when we stayed at home for a really short amount of time because of Coronavirus and the confinement, the planet could breathe again, it healed, and that is due to people staying at home and the planet healed.

Sustainability is a very important matter and we should really focus on it so that we ensure a future for our children and grand-children and for the planet to survive."

*Tourism*

OMAN

# Sport and events in Oman

3

## OMAN

Oman plays host to international golf, cycling, motorsport and table tennis events. Football and handball are the most popular local leagues in the country.

ITTF Challenge Series



Tour of Oman



Oman Handball League



Oman International Rally



Oman Open (Golf)



Oman Professional League



OMAN

Compared to it's neighbours, Oman hosts fewer international sporting events. It does however, hold varied sports like table tennis and handball along with hosting global golf and rally events.

SELECTED SPORT EVENTS				
Event	Sport	City	Local / International / Global	Attendee Numbers
Oman Professional League	Football	Multiple cities	Local	100,828
Sultan Qaboos Cup	Football	Multiple cities	Local	
Oman Handball League	Handball	Multiple cities	Local	
ITTF Challenge Series, Oman	Table Tennis	Muscat	Global	
Tour of Oman	Cycling	Multiple cities	Global	
Oman International Rally	Motorsports	Muscat	Global	
Oman Open – European Tour	Golf	Muscat	Global	

Source: YouGov Sport, Desk Research, event sites



OMAN

Oman's cultural events are largely local ones designed to engage with residents. Most events are held in the capital.

SELECTED LEISURE EVENTS			
Event	City	Local / International / Global	Attendee Numbers
Salalah Tourism Festival	Salalah	Local	723,720
Muscat Festival	Muscat	Local	704,142
Winter Village, Muscat	Muscat	Local	70,000
Muscat Marathon	Muscat	Local	10,000
Muscat International film festival	Muscat	Local	5,000
Oman National day celebrations	Multiple cities	Local	
Renaissance day celebrations	Multiple cities	Local	
Sultan Camel Race Cup	Barka	Local	
Muscat Eat (food festival)	Muscat	Local	

Source: YouGov Sport, Desk Research, event sites

## OMAN

Sustainability is a key strategy for Oman's Vision 2040. However, there is little evidence of (football) stadiums in Oman appearing to have implemented sustainability practices, or at least publicise these.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
<b>Sultan Qaboos stadium</b>	Muscat	34,000	1985	Football – Oman National Team
<b>Sohar Regional Sports Complex</b>	Sohar	19,000	1983	Football – Oman Professional League
<b>Al Rustaq sports complex</b>	Al Rustaq	17,000	2019	Football – Oman Professional League
<b>Ibra Sports Complex</b>	Ibra	15,000	2020 planned	Football
<b>Al Seeb stadium</b>	Muscat	12,000	2004	Football – Oman Professional League
<b>Royal Oman Police stadium</b>	Muscat	12,000	1987	Football – Oman Professional League
<b>Nizwa Sports Complex</b>	Nizwa	10,000	1994	Football – Oman Professional League
<b>Al Saada stadium</b>	Salalah	8,000	2009	Football – Oman Professional League

Source: YouGov Sport, Desk Research, event sites

OMAN

Non-sporting venues in Oman appear to have embraced sustainability more.

SELECTED VENUES					
Venue	City	Capacity	Built in	Main event	Sustainability features
Sur stadium	Sur	8,000	1996	Football – Oman Professional League	
Oman Convention & Exhibition Centre	Muscat	4,000	2016	Trade exhibitions	LEED Gold certification from the United States Green Building Council (USGBC)
Royal Opera House	Muscat	1,100	2011	Opera, Music concerts	Sustainability Initiative of the Year (2012 award from Omani construction industry)
Al Rustaq Indoor hall	Al Rustaq	1,000	2019	Volleyball, basketball and handball	
Ibra Indoor hall	Ibra	1,000	2020 planned	Volleyball, basketball and handball	
Al Amerat Cricket stadium	Muscat		2012	Oman National Cricket team	
Oman International Exhibition Centre	Muscat		1985	Trade exhibitions	
Musannah Sports City	Muscat		2010	Beach games, Sailing	Local employment during construction

Source: YouGov Sport, Desk Research, event sites

O M A N

# Sustainability in sport and events in Oman

4

OMAN

SELECTED PROJECT

While goals for sustainable development are defined at a national level, we looked to understand the how initiatives have filtered down to industry. **Bank Muscat's Green Sports** initiative is one example of a private and public partnership to improve sustainability across community and youth sports .

**With a strong sustainability focus, Green Sports is a unique CSR initiative started by Bank Muscat in 2012.**

- > Aims to improve the state of youth sports by greening the fields on which the sports are played
- > Currently focused on football, Bank Muscat supports 10 to 15 fields/stadiums annually by helping them with green facilities
- > In its 9th year, the initiative has benefitted 108 sports teams so far and a total of 65 football fields have been developed The main services that this initiative offers are:
  - > *To green the football pitches using grass/turf*
  - > *Install floodlights*
  - > *Water desalinization equipment in areas of facing water salinity problem*
- > The football fields developed as part of the Green Sports programme are now serving as a meeting place for children and youth thus creating a platform for social engagement
- > The fields are also used to host various community-led activities such as Ramadan nights, group weddings and other celebrations

Complementing governmental efforts to build a sporting nation, this initiative is aimed at also contributing to sustainable development in Oman

Bank Muscat Green Sports Initiative



Source: YouGov Sport, Desk Research, trade & event sites



## O M A N

**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



Fostering Nature



Supporting Communities



Conserving Resources

#### Supporting Partners



Source: Desk Research. Sustainable.golf

## OMAN

## SELECTED PROJECT

Al Mouj Golf course in Muscat, host venue of the European Challenge Tour's annual Road to Oman grand final is the only golf course in Oman to have gained GEO sustainability accreditation.

## Al Mouj Golf Course, Muscat · GEO certified in 2017



Source: YouGov Sport, Desk Research, event sites, SustainableGolf



Currently, one other golf course is participation in the OnCourse Programme: Muscat Hills & Country Club

**Re-naturalised out-of-play areas of the golf course, allowing them to blend in with the desert surroundings and to conserve biodiversity and natural habitats. As a result there has been an abundance of bird species recorded at the golf course.**

- > Potable water usage at the facility has also been dramatically reduced. 100% of the course's irrigation needs are now sourced from treated sewage effluent (TSE).
- > Sprinkler head audit reduced water consumption by 100,000m<sup>3</sup>, saving \$28,000 annually.
- > Collaborated with Environmental Society of Oman (ESO) in the preparation of golf tournaments, as well as engaging visitors, members and staff in the clubs in sustainability initiatives.
- > Sustainable initiatives for the 2020 Oman Open held at the venue included:
  - Bamboo tees from Ocean Tee
  - All tickets and the tournament programme printed on recycled paper, with the surplus collected post event by a recycling company
  - Plastic bottles collected in specific bins and recycled by Be'ah
  - Reduced single use plastic bottles by using 5 gallon dispensers and giving players, caddies and officials refillable bottles
  - New trophy produced locally using traditional techniques and local materials

OMAN

## Leading by sustainable example :

Be it personal experience (and journey), or via media channels, Omani professionals are widely versed in where sustainable initiatives are being implemented – none of which are in Oman.

### Large Events Venue

"When they wanted to take the audience and admit them into the field, it was through metro Dubai ... that runs on solar energy, and car companies that transport people also use cars that run on solar energy and chargeable cars ...

"There was no papers at all, there was nothing printed ... There was waste sorting ... When I entered the event, I did not enter using a paper ticket ... Even the ads that were present there were all on screens and were digital.

"Everything that was supposed to be served in plastic was served in paper. All food and beverage was served in paper, there was not anything plastic. They said that they are trying to reduce the use of plastic because it is toxic.; it harms the environment and is not biodegradable in nature ..."

"The stands were empty from plastic ... Everything was made of cement. The infrastructure that the stand was made from were all related to sustainability and recyclable ... The lightings in the field and the stands run on solar energy..

"I read about, it was used in the United States, in Florida. In the football fields ... They were recycling the wastes in the fields ... the audience usually have food and drinks in plastic ... Instead of using plastic containers, they used paper bags, which makes it easier for recycling. They also used wood in the construction of their fields in the country because it is easier to be recycled."

### Major Events / Large Events

"There was the Dubai Sports Council, which is one of the institutions that implement this sustainability. They were hosting the Dubai International Tennis Championship. I attended it and they were applying the international standards of sustainability."

### Tourism

"In the Olympics that should have taken place this year in japan.. they used solar energy through using solar panels to generate electricity. They decreased the use of cars that run on petroleum. This is very beneficial as they number of participants and spectators is huge.

They can use public transport, like a bus, to lower the use of individual cars, and decrease the carbon emissions into the air. If I am not mistaken, the Olympics that took place in England in the year 2012, they implemented sustainability."

### Sport Club

OMAN

## Sustainable initiatives in practice:

Recognisably small yet practical sustainable efforts; paperless environments, elimination of single-use plastics and digital communications, are being deployed within industry.

"We are implementing some simple measures on the personal level. Each one of us is well aware and in our company, we try to implement it. For example, we do not have print out manuals, neither handouts nor brochures to give our clients. Everything is digital and online...

We reduced a lot of paper, paperwork, print outs, carton and even plastic. Second, we try to eliminate the use of plastic, in the bags, water bottles, cups and the things we serve our clients during tours. This is mentioned in the company's guidelines and we do not work with a consultant or other company that sets these guidelines for us.

We are aware that we work in an industry where we should show a good image especially that our clients are European, who as you know, are highly aware about this subject. In addition, we are trying to increase the use of cars that run on solar power. Honestly, we implement the sustainability measures but on a smaller scale."

*Major Tourist Attraction*

"We have the containers that separate the garbage: containers for paper waste, for plastic waste and for metal waste. We are trying our best that the company decreases the use of single-use plastic. We try to use other things, so we don't damage the environment. We are trying also as much as we can to use technology, anything that is via the internet, instead of using printed papers."

*Large Events Venue*

"When it comes to paper or tickets, we do not use paper tickets. We use technology, everyone has emails that could be used to communicate and deliver, why should we harm trees to make paper. We try as hard as possible to communicate online and for the tickets to be numeric and if any client wants to communicate with us we do it through email instead of mail using papers. The most important thing for us is to reduce the use of paper."

*Tourism*

> The elimination on single-use plastics is high in awareness and actively being tackled

"I am a part of a sustainability team ...We are holding awareness campaigns about the elimination of plastic usage and replacing it with either paper or glass material. ... in our offices, we are not using paper nor plastic at all.

We are trying to replace them with glass because it is better than both paper and plastic. We are trying to place sorting waste bins, categorized as plastic, paper and other. We are trying to do all the transactions online. All the files are stored on the computer.

We do not have paper nor paper documents...We are trying to make all the tickets that we give our clients to be digital. No paper material as we are trying to limit it as much as possible. We are trying to do these things. We are starting with small steps and trying to go bigger."

*Large Events Venue*

## O M A N

**Importance of sustainability:**

Industry professionals believe sustainability plays a pivotal role in their business and by return, their business provides a platform from which to spread awareness and educate.

"In our industry, we receive tourists from more than one place in the world, we meet with many people during events, tourism and sports industry. People from different countries come to watch this and take part of it. When we show them how we are preserving the environment and new ways of sustainability practices then we are showing them our culture. We show them what we provide, how we care for the environment, it will allow them to have more responsibility towards the matter'."

*Large Events Venue*

"I think that sports and tourism are the industries that attract people the most, not only in the area that we live in. there are countries that depend on the income of sports tourism and tourism in general. For sure, they play an important role. If we start with them, it mean we started with the entire society. It is very important to implement standards that are environmentally friendly and preserve the environment in these two industries. It is important maybe because of the huge number of people."

*Major Tourist Attraction*

"In these industries, there are crowds of people so we can spread more awareness among them and present ideas. In addition, in these crowds, there is high consumption of materials that are harmful to the environment."

*Tourism*

"In the sports industry, sustainability directs the attention to sports. Any country in the world that mentions the topic of sustainability in it's sport industry, I expect it to have great success in its sports industry, especially in its relations with other countries when it comes to sports. It also affects the economy. For example, for sustainability we enhance the infrastructure for the preparation of the events, whether it is the football field, the tennis field, table tennis, swimming pools or any sports event. This attracts the attention, especially locally and internationally."

*Major Events / Large Events*



OMAN

## Relevance of event size:

Sustainable practices should be implemented no matter the size of event, the only bearing size has is in bigger events it is absolutely crucial.

"There are many event sizes, which have different importance, but this does not mean that I should not implement sustainability if my sports court is small or not international, whether it is local or international. So no, whether it is a big or small size, the idea of sustainability is something very important, whether it is a local or international event ....

If I have a sports arena in Oman, I will host championships for the clubs that are in the country. I will implement sustainability in it because it will attract the attention of other local sports clubs as well as international ones like the Gulf countries ...This is all because I am implementing sustainability, so my business will gradually grow."

*Major Events / Large Events*

"Any event whether small or big, must have sustainability measures.... Organizing such events can raise awareness in the generation on how to clean and what to do. The role of sports is not only about letting kids play sports; they can educate them and change their routine a little bit. For example, they could tell the kids that today we have cultural awareness lessons about the environment and the ways of implementing sustainability."

*Sport Club*

"Sustainability could be applied in both small and big events. As I told you before, awareness is very important. The more we have awareness, the more we can spread the good ideas across generations, and the more we are able to expand the idea. But, of course, the more the event was big, the more number of people receive my voice, and I can train them, the better it is."

*Large Events Venue*

> Sustainable practices are believed, to some extent, to contribute to longer term business growth via the attractiveness of 'Awareness'

"The bigger the event, the more responsibility we have. You have to pay attention to the smallest details. It is unfortunate that when you go to a football game, a tennis tournament or any tournament, and see that there is a massive amount of foam plates, plastic material, plastic bags, or even the badges that that are made of nylon or material that is non-recyclable.

My dream is that one day the government of any country will oblige us to separate our waste between plastic, glass and other wastes.

I respect this implementation in Europe and hope that we implement it here at large. We implement it here at malls, but we still have not implement it on a larger scale. Maybe in the events, the organizers are starting to care about it a bit."

*Major Tourist Attraction*

OMAN

## Accreditation and measurement:

For the most part (in some cases, prompted), most of the industry professionals were aware of ISO accreditation; where knowledge is not absolute, there is the assumption that everything in Dubai is accredited.

- > Measurement largely welcome – and carried out using international benchmarks

### ISO 20121

"Dubai Sports Council is one of the organizations that earned this certificate. It incorporates more than one international tournament; it includes Swimming World Cup, Dubai International Tennis Championship that I watched, Speedboat Championship, Asian Water Games Championship and many other international championships."

*Tourism*

"The Dubai World Cup for horseracing. When I visited the United Arab Emirates, more than one event was ISO certified like Swimming and Diving World Cup and Dubai International Tennis Championship. Currently, they are working on Dubai Expo, which is ISO certified. I think Bee'ah Company received this certificate. I know these ones."

*Large Events Venue*

"All the events I already mentioned are ISO certified. And it is important to have it because it's proof that you did well in implementing sustainability. For example, there's also the World Horse Race in Dubai, Dubai Desert Tournament, the Speedboat Championship, cricket and rugby championships."

*Major Tourist Attraction*

### MEASUREMENT

"We can measure it, by sending people specialized in sustainability and send with the economic schedule to check where the money is going.

They should check if sustainability is actually being implemented or not, and if it abides by the international standards or not ... I believe that the benchmarks should be the same so that everyone implements them and abide by them. It should not be different from a country to another."

*Tourism*

"Yes, of course. There are a lot of measures that can be used, like economic measurements. They provide traceable reports and tables that help in the economy.

As far as I know, the most widely used is called green management. They use it in many countries, not only in Emirates. Its name is Green Economy Index. It is the most successful one and is used by large companies."

*Large Events Venue*

OMAN

## Challenges:

Costly infrastructural changes are considered the hardest obstacles to overcome within industry.

"I expect that working with the infrastructure would be a little bit tough especially if we had a large stadium...In this situation, working on the sustainability of the infrastructure might be somewhat costly.... Working on the infrastructure might have a high cost but in the future, it will benefit me and I will realize that it was a gain for me, not a loss."

*Major Events / Large Events*

"As for the ones that are tough to implement, I believe that it is the infrastructure because it needs a long time, a lot of effort, and previous deals so it needs time, which is also in the economic area. I think this is tougher to implement than sorting wastes or using reusable plastic and those things."

*Tourism*

"I think it is the infrastructure and the construction of the stadium using recyclable material. If we want to install a huge solar to transform solar energy into power instead of electricity and petroleum. I think that it is costly; it will take time and effort."

*Large Events Venue*

### Focus areas

- > Waste management
- > Recycling
- > Plastic alternatives
- > Transportation
- > Solar energy

EASY

HARD

OMAN

# Conclusions



# Nudge, push or pull?



There should be plans to be executed ... economic schedules to see how costly the things are, and for the companies to know if they can pay and if the companies responsible for sustainability can help in this thing."



## O M A N

## Conclusions

**Very much a high profile element in Vision 2040, Oman has made concerted efforts to educate and engage the nation on sustainability and the role it plays in the country's future.**

- > Sustainable initiatives already exist in the country and industry, with a particular focus on waste management, finding plastic alternatives and some transportation solutions.
- > Alternative solutions to single-use plastic are actively being worked on.
- > Good awareness and knowledge of all aspects of sustainability and its application within the sports and events industry.
  - *Neighbouring UAE appears to be closely monitored and highly regarded*
- > There is a general view that sustainability plays an important role in the sports and events industry; providing a great platform from which to raise awareness and influence the wider population
  - *The vision also being that whilst this may be initially costly, the longer term benefits are two-fold*
    - *Cost savings*
    - *Company notoriety*

## Recommendations

**With sustainability a key feature of Oman's future strategy, all going well, the country should welcome initiatives with open arms.**

- > All companies, sports and events have a role to play within their community
  - *Helping to raise awareness and education*
  - *Both in marketing around, pre and during events – creating nudge behavioural practices along the way*
- > Co-ordination with sustainable organisation can help forward the cause
  - *SustainableOman*
  - *Sainbags (disposables)*
  - *Oman Environment Day ..... Month?*
- > Facilities and venues to be updated (or sustainable features promoted)
- > There needs to be State funding and guidance on how to make this commercially attractive and viable

# YouGov® Sport

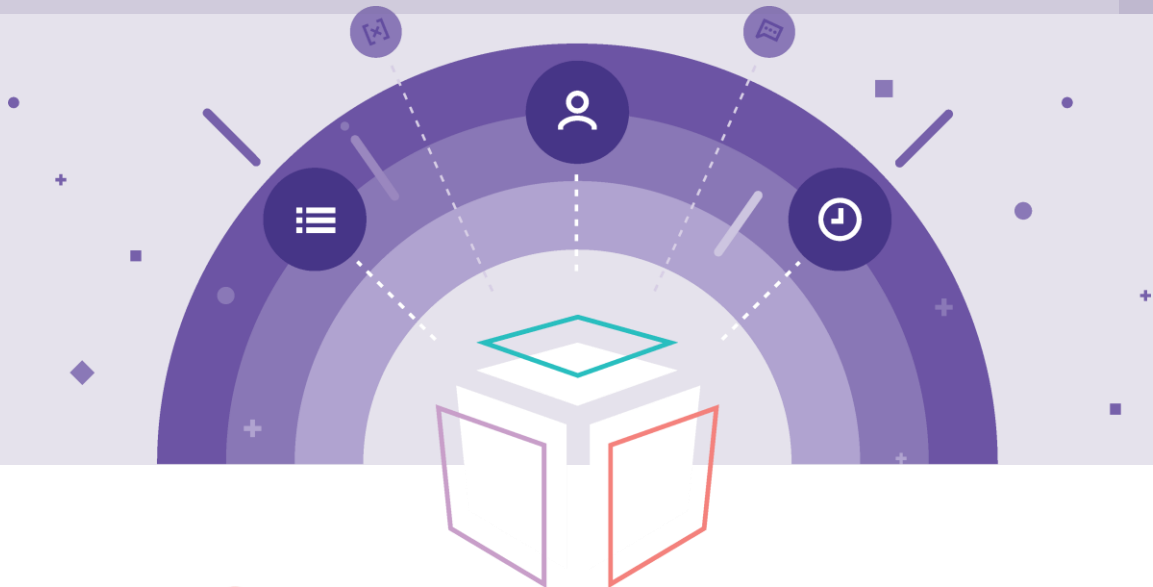
We are a global sports, sponsorship and entertainment research company, working with the industry's key players to unlock meaningful, actionable insights.



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