

# YouGov<sup>®</sup>Sport

## Tunisia

Sustainability in the sports, events  
and tourism industries in Tunisia





## METHODOLOGY

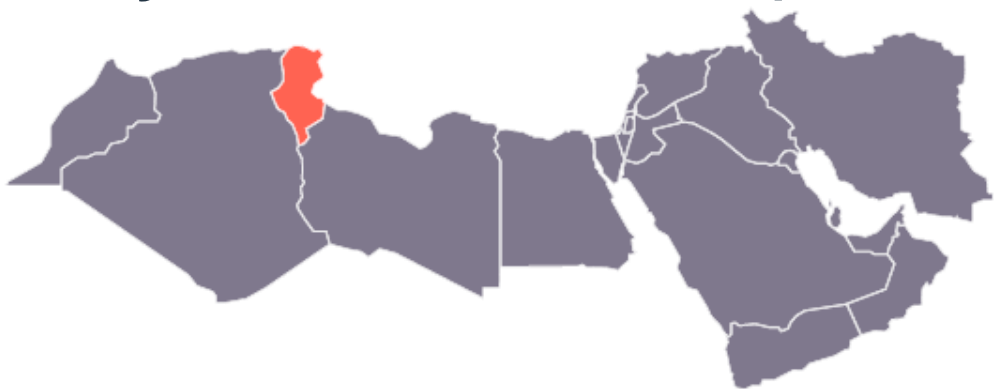
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TUNISIA

# Key Areas of Exploration

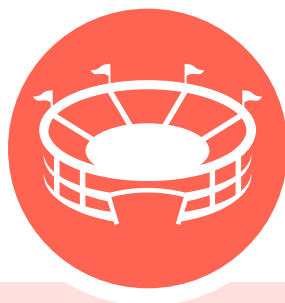


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in Tunisia.

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



Sustainability and its position  
in Tunisia



Sports, events & tourism  
in Tunisia



Sustainability within sports,  
events & tourism

## TUNISIA

# 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
- > 6 Industry professionals interviewed in Tunisia

## DESK RESEARCH

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

TUNISIA

# Tunisia Country Overview

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# Tunisia

Tunisia is a part of the Maghreb region and the smallest country in Northern Africa. With a Mediterranean coastline and a shared maritime border with Italy, the country has played the role as strategic hub over time. Tunisia is not a densely populated country; around two thirds live in urban locations, with around one quarter living in the greater area of the capital, Tunis.

## COUNTRY INFORMATION

Size	0.2M sq. km
Population	11.7 million
Capital	Tunis
Other major cities	Sfax, Sousse
Languages	Arabic, French, Berber
Currency	Tunisia Dinar (Current conversion at USD 0.36)
Borders	Algeria, Libya

Source: Desk Research, World Population Review, World Capital Cities

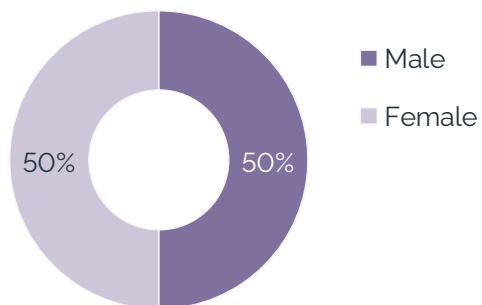


TUNISIA

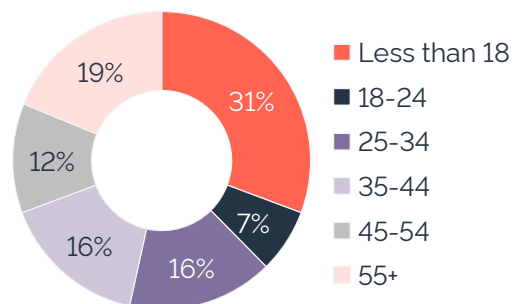
# Its people

About 70% of Tunisia's population is under 45 and local. Whilst mostly urban, the 10 most populous cities only constitute 16% of the total population. Tunisia's official employment rate is amongst the lowest in the MENA region and particularly acute amongst women, younger and educated populations.

## GENDER

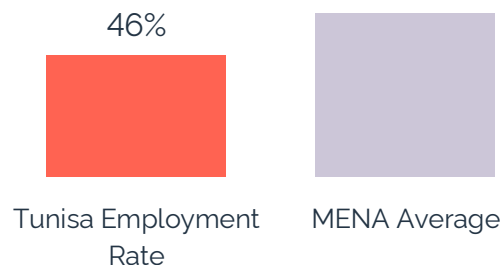


## AGE

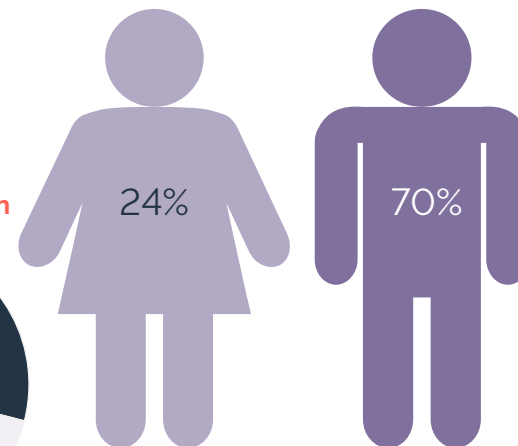


## LABOUR FORCE PARTICIPATION – 2019

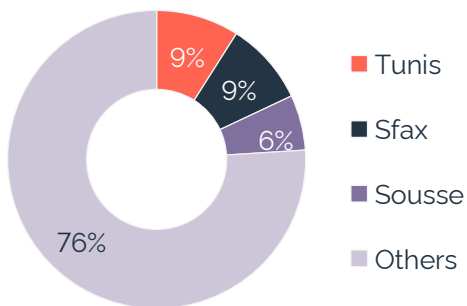
### Employment Rate



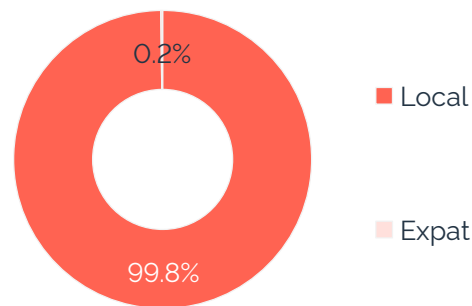
## % OF WOMEN/MEN IN WORKFORCE



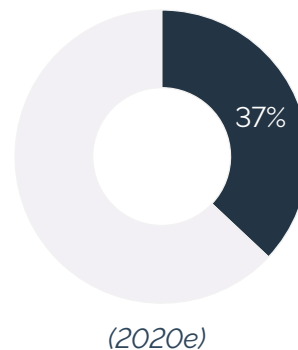
## LOCATION



## NATIONALITY

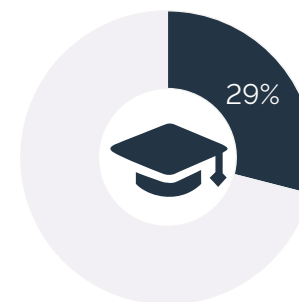


### Unemployed\* Age 15-24



(2020e)

### Advanced Education



(2017e)

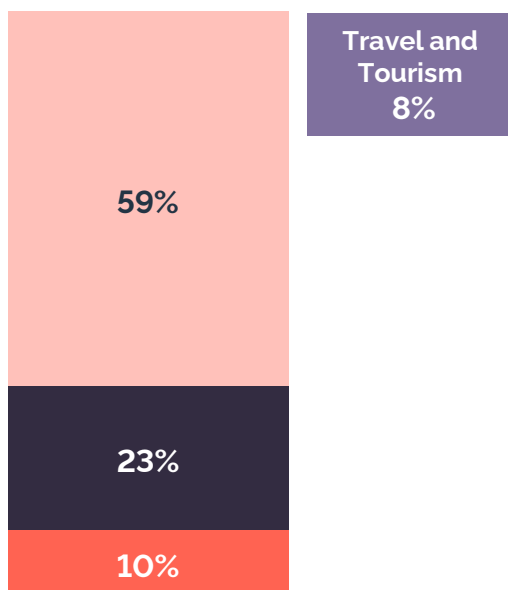
Source: Desk Research, YouGov Panel, \*World Bank

TUNISIA

# Economy

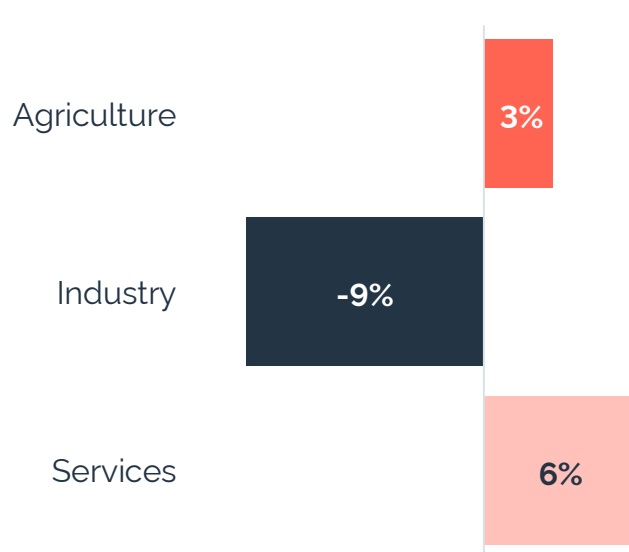
Tunisia's economy is services oriented and increasingly so over the past decade. Within this sector ICT (Information and communication technologies) and tourism are focus areas. Tourism is also a large employer and the sector has been recovering since the security challenges of 2015, with 2019 being a particularly healthy year.

GDP BY MAIN SECTOR – 2018

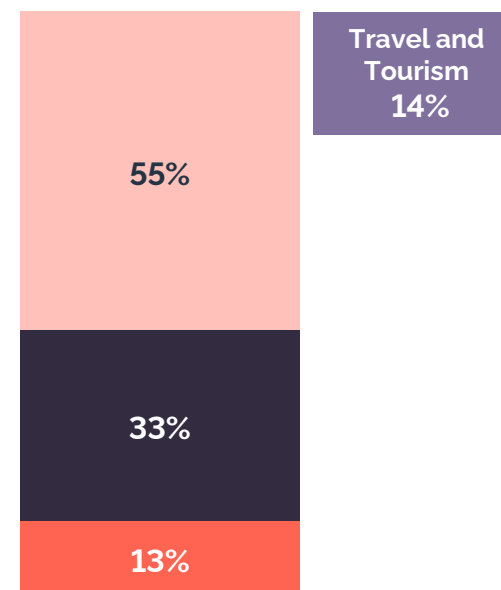


■ Agriculture ■ Industry ■ Services

GDP GROWTH BY MAIN SECTORS – 2008 TO 2019



EMPLOYMENT BY MAIN SECTOR – 2018



■ Agriculture ■ Industry ■ Services

Source: Desk Research, Statista, Nordea Trade, Arab News, Reuters, Jakarta Post

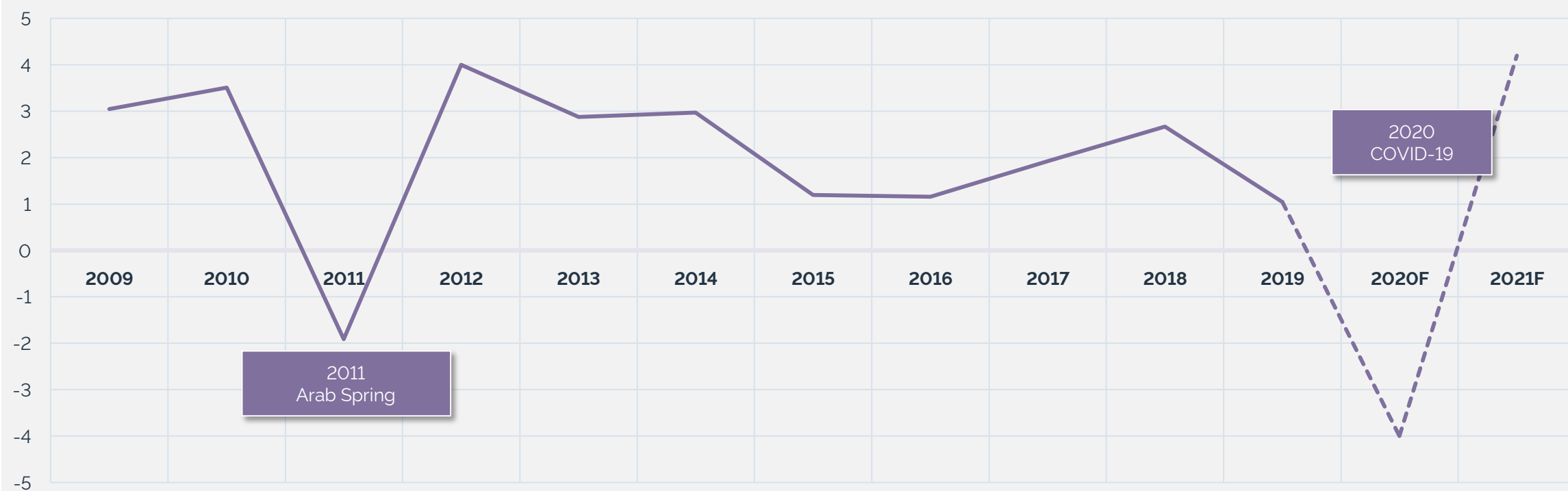


## TUNISIA

# Outlook

Tunisia's economy has experienced repercussions from the internal political, economic and geopolitical challenges since 2009 and national uprising in 2011. It has been largely supported by the agriculture, electrical, mechanical and in particular, service industries over the last couple of years. Due to COVID-19, Tunisia faces a tough 2020 similar to most but is projected to bounce back in 2021.

## GDP GROWTH



Source: Desk Research, World Bank

TUNISIA

# Sustainability in Tunisia

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## TUNISIA

In 2016, Tunisia 2020 was devised with the aim of ***“bringing economy, finances and the assets of the ‘New Tunisia’ to the forefront in order to restore sustainable growth and attract “not donations but concrete investments”***. The implementation of this plan took place during a specific political and economic climate; the first free elections closely followed. The plan has as its basis 5 pillars:

The driving aim of this growth model was to unleash the private sector and promote economic opportunities for all. Specifically, to address the challenges of creating quality jobs for the educated youth market.

## TUNISIA'S 5 YEAR PLAN(2016-2020)PILLARS

REFORMS AND  
GOVERNANCE

ECONOMIC HUB

HUMAN  
DEVELOPMENTREGIONAL  
AMBITIONS

GREEN ECONOMY

Source: Desk Research, lammena.com, UN.org

## TUNISIA

Whilst facing some challenges in terms of harmonious growth, the original 5 pillars were aligned to the UN's Sustainable Development Goals (SDGs).



Since establishment, the transitional period to a democratic state has not been smooth. Protests and social movements have strongly marked the time, whilst unemployment and poverty rates have risen sharply.

### REFORMS AND GOVERNANCE

- > Establish a rule of law guaranteeing respect for fundamental freedoms and access to information
- > Develop effective, honest, transparent and accountable institutions.
- > To constitute an alert, vigilant, united and participative civil society

### ECONOMIC HUB

- > Foster growth to create employment.
- > Support economic players with aid and support measures that create jobs

### HUMAN DEVELOPMENT

- > Reduce poverty levels
- > Overcome income inequalities
- > Better food security
- > Promote maternal, new born and child health.
- > Allow universal and equitable access to health care and services

### REGIONAL AMBITIONS

- > Allow inclusive development of all regions
- > Reduce unequal distribution of resources and facilities for internal regions

### GREEN ECONOMY

- > Promote sustainable agriculture and improve Food Safety
- > Guarantee access for all to reliable and modern energy services  
Strengthen the protection and preservation of cultural and natural heritage.
- > Reduce negative environmental impact of cities and ensure access to green spaces and safe public spaces
- > Reduce environmental degradation at the cost of economic growth

Source: Desk Research, Iammenna.com, UN.org



## TUNISIA

Tunisia is currently updating its plan for the next five years. In the meantime, the initial alignment with the UN SDGs is as follows:



Reforms and Governance	
SDG #	Goal
1	No Poverty
11	Sustainable Cities and Communities
16	Peace, Justice and Strong Institutions

Economic Hub	
SDG #	Goal
8	Decent Work and Economic Growth
9	Industry, Innovation and Infrastructure

Human Development	
SDG #	Goal
1	No Poverty
2	Zero Hunger
3	Good Health and Well Being
4	Quality Education
5	Gender Equality

Green Economy	
SDG #	Goal
6	Clean Water and Sanitation
7	Affordable and Clean Energy
12	Responsible Consumption and Production
15	Life on Land

Regional Ambitions	
SDG #	Goal
10	Reduced Inequalities

Partnership for achieving all objectives	
SDG #	Goal
17	Partnerships for the Goals

Source: Desk Research, Iammena.com, UN.org, Tunisian Evaluation Network

## TUNISIA

## SELECTED PROJECT

After many years of industry resistance, Tunisia is finally on the path of plastic waste reduction through a ban on single use plastics bags from February 2020. This is being implemented in a phased manner – pharmacies and supermarkets first, followed by a complete ban in 2021.

**Ban on Plastic Bags**

- > The program aims to reduce the 126,000 tons of single use plastic bags used by Tunisia annually. This equates to 4.3 billion single use plastic bags
- > 100,000 marine animals can be saved through this program
- > Will help reduce losses to Tunisia's economy to the tune of \$20M annually due to plastic pollution, as it affects the tourism, shipping and fishing economies

20% of Tunisia's plastic waste is not collected, 16% openly dumped and only 4% is recycled



Bags caught on a tree along a desert road on the outskirts of Gafsa governorate in western Tunisia.

Source: Desk Research, trade sites

## TUNISIA

**Industry professionals' awareness:**

All industry professionals are aware of sustainability as a concept.



"Today our organization has a sustainability strategy in the sports field, it is it which imposed this culture, necessarily they understood after 2015 in paragraph 47 of the 2030 agenda for sustainable development which was signed in New York shows that sport has a very important role in making the 2030 sustainable development agenda a success, we share the philosophy of the CIO."

*Sport Governing Body*

TUNISIA

# Sport and events in Tunisia

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## TUNISIA

Tunisia hosts a mix of international and local events – The international events hosted are relatively small on a global scale.

Tunisian Football League



Tunis Open  
– ATP Challenger Tour



Tour De Tunisie



Africa Rugby Sevens



World Para Athletics Grand Prix



TUNISIA

Along with the local football league which is the biggest draw, Tunisia also hosts a varied mix of other sports.

SELECTED SPORT EVENTS			
Event	Sport	City	Local / International / Global
Tunis Open	Tennis	Tunis	International
Marathon International Comar de la Ville	Marathon	Tunis	International
Rugby Africa Women's Sevens	Monastir	Marrakech	International
World Para Athletics Grand Prix	Athletics	Tunis	International
Tour de Tunisia	Cycling	Multiple cities	Local
Tunisian Ligue Professionnelle 1	Football	Multiple cities	Local
Championnat National A	Basketball	Multiple cities	Local
Tunisian Handball League	Handball	Multiple cities	Local
Tunisian Athletics Championships	Athletics	Multiple cities	Local

Source: YouGov Sport, Desk Research, event sites

## TUNISIA

Music festivals are both numerous and international. Others are diverse and speak to a wide audience; literature, falconry and local culture.

SELECTED LEISURE EVENTS			
Event	City	Local / International / Global	Attendance
Tunisia's International Book Fair	Tunis	International	100,000
Tabarka Jazz Festival	Tabarka	International	
International Music Festival of Carthage	Carthage	International	
Hammamet International Music Festival	Hammamet	International	
International festival of sousse	Sousse	International	
Bizerte International Festival	Bizerte	International	
International festival of symphonic music	El Jem	International	
Tozeur Oasis Festival	Tozeur	International	
Festival Medina	Tunis	International	
Tunisia Falconry Festival	El Haouria	Local	
Ulysses festival	Jerba	Local	
La Marsa's Nights	La Marsa	Local	
Sahara festival	Douz	Local	
Sahara Tourism Day	Douz	Local	
Sousse Spring Festival	Sousse	Local	

Source: YouGov Sport, Desk Research, event sites

## TUNISIA

Tunisia has multiple large stadiums spread across the country, including a few in the pipeline. Whilst the majority are for the domestic football league, Tunisia also has a rich indoor sporting culture with smaller venues to support this. Little publicised information on sustainability features.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
Radès Olympic Stadium	Radès	60,000	2001	Football – Tunisian Ligue Professionnelle 1
Sousse New Olympic Stadium	Sousse	49,000	2021 expected	
Sfax New Local Stadium	Sfax	45,000	2021 expected	
El Menzah Stadium	Tunis	39,858	1967	Football – National team games
Stade Olympique de Sousse	Sousse	28,000	1973	Football – Tunisian Ligue Professionnelle 1
El Taïeb Mhiri Stadium	Sfax	22,000	1938	Football – Tunisian Ligue Professionnelle 1
Ben Jannet Stadium	Monastir	20,000	1958	Football – Tunisian Ligue Professionnelle 1
15 October Stadium	Bizerte	20,000	1985	Football – Tunisian Ligue Professionnelle 1
Chedly Zouiten Stadium	Tunis	18,000		Football – Tunisian Ligue Professionnelle 1
Sports Hall of Radès	Radès	17,000	2004	Handball
Tunis Sports City	Tunis	15,000	2025 expected	
Bou Kornine Stadium	Hammam-Lif	15,000		Football – Tunisian Ligue Professionnelle 1
Municipal Stadium of Gabès	Gabès	10,000	1987	

Source: YouGov Sport, Desk Research, event sites



TUNISIA

Football dominates the larger stadia.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
Gabès Local Stadium	Gabès	10,000	2001	Football – Tunisian Ligue Professionnelle 1
7 March Stadium	Medenine	10,000	2000	Football – Tunisian Ligue Professionnelle 1
Boujemaa Kmiti Stadium	Beja	10,000	1993	Football – Tunisian Ligue Professionnelle 1
El Menzah Sport Palace	El Menzah	5,500	1967	Indoor games
Nabeul Bir Challouf Indoor Sports Complex	Nabeul	5,000	2004	Basketball – Championnat National A
Sousse Indoor Sports Hall	Sousse	5,000	1987	Basketball – Championnat National A
Alhambra Cinema	La Marsa	6,000	1924	Concerts
Theatre Municipal de la Ville de Tunis	Tunis	1,350	1902	Concerts
Le Kram - Exhibition and International Trade Center	Tunis		1993	Exhibitions

Source: YouGov Sport, Desk Research, event sites

TUNISIA

# Sustainability in sport and events in Tunisia

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## TUNISIA

## SELECTED PROJECT

**Goals for sustainable development are defined at a national level:** We look to see how these filter to industry. Tunisia is still in the nascent stages of developing a sustainable tourism sector which aligns with the Green Economy pillar in Vision 2020.

Goals laid down by the charter are aimed at tackling the problem of plastic pollution of the Mediterranean Sea which costs Tunisia USD 20 million annually to protect its fishing, navigation and tourism

### Tunisia Sustainable Tourism Charter, November 2019

The Sustainable Tourism Charter signed in November 2019 in Hammamet town hopes to make quick strides in the promotion of eco-tourism in Tunisia.

- > Discontinue single use plastic cups and cutlery in hotels by March 2020 and plastic straws by December 2019
- > Dispose and recycle waste more responsibly with tour operators encouraging hotels to get a Global Sustainable Tourism certificate by December 2020
- > Produce a work plan for the Hammamet Municipal Council and central government by March 2020
- > Provide support to local economies by creating more opportunities for regional artists to sell their crafts to visitors
- > Improve promotion of local food in hotel restaurants by March 2020.



The charter should lead to more sustainable and environmentally-friendly tourism industry in Tunisia, responding to the increasing priority that British and other foreign tourists are placing on the environment when making their holiday choices.

Source: Desk Research, trade sites

## TUNISIA

**The GEO Foundation** is the international not-for-profit organisation dedicated to helping golf deliver and be recognized 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, SustainableGolf



## TUNISIA

## SELECTED PROJECT

3 golf courses in Tunisia are planning to gain the GEO sustainability accreditation thus reflecting the combined commitment of both the nation towards sustainability in not just tourism but also sport.



### OnCourse® programme for GEO certification

**The Golf clubs participating in the OnCourse® programme for GEO are committed to continual improvements in the important sustainability areas of Nature, Resources, and Community.**

- > GEO organization helps the venue attain certification through training programmes on tweaks to be done to the course
- > GEO organization helps the venue attain certification through training programmes on tweaks to be done to the course
- > The current situation is analysed with the help of GEO to create a baseline of sustainability data
- > The changes are suggested based on the local resources and international best practices
- > An app allows the venue to track its progress on implementation
- > Once changes are done, the venue can apply for sustainability certificate from GEO

Source: Desk Research, SustainableGolf

### 3 golf courses on the sustainability path in Tunisia

The Residence Golf Course, Gammarth



Citrus Golf Course, Hammamet



El Kantaoui Golf Course, Hammam Sousse



## TUNISIA

**Leading by sustainable example :**

Some local events appear to include sustainable initiatives, however, this seems to be very localised.

**POSITIVE RESPONSE**

"Sports associations like the ASPTZ in Zaghouan, Association the friends of fawar in Hammamet, these association have always worked with the CNOT, on an international scale the Olympic games."

*Sport Governing Body*

**POSITIVE RESPONSE**

"We schedule an annual "Zriba by night" event each July where we use sustainable practices."

*Event Organiser*

**UNCERTAIN RESPONSE**

"In Tunisia, no, but I think those in charge of organizing a global event such as the World Cup."

*Event Organiser*

**UNCERTAIN RESPONSE**

"This initiative is not present on the agenda in the sports field, or in the organization of events in Tunisia."

*Sport League*



## TUNISIA

### Sustainable initiatives in practice:

With few local examples, it follows that there are few current remits employing sustainability, but there is a start...

"It's true that we're using plastic bottles, but there's a focus on custom bottles for players. Bottles for multiple uses. We are pushing for this trend.

Regarding electronic tickets, the football field started to work on this initiative, handball wanted to work on this case and considered this practice during the last African Cup, we managed to prepare the component well theoretical in terms of papers, authorization ... but unfortunately the procedure is too long, it requires good logistics."

*Sport Governing Body*

"Sometimes we organize events (according to customer demand) where we use sustainability practices, for example degradable products, single use plastics, save energy through solar energy, but these applications always depend on the demand of the client, when it is mainly an event for an international company established in Tunisia and which is subject to international standards. That is to say that sustainable development practices only apply by obligation."

*Event Organiser*

"'Eco-train' event in Zaghouan: a natural and ecological race: we apply sustainable measures during this event: the equipment used for mark-up and signage is imported, are ecological products which must not will harm nature (do not dispose of and collect the material at the end of the event) and unfortunately these products are not available in Tunisia ..."

*Event Organiser*



Single-use plastic is not an initiative that appears to be considered throughout; more client (and budget) specific

## TUNISIA

### Importance of sustainability:

Whilst in its infancy, there is recognition of the need for sustainable practices within the sport and event industry; country economic challenges prevail, however.

#### POSITIVE RESPONSE

"Yes of course sustainable development is important for everyone and concerns all sectors and fields of activity. But during sporting events that bring together a large number of participants and fans, we always take advantage of these opportunities to raise awareness.

We encourage ecological consumption, waste filtering."

*Event Organiser*

#### POSITIVE RESPONSE

"Sustainability practices are important, because generally without this practice everything becomes harmful in the medium and long term, when I see a recycled plastic bag thrown in 3rd or 4th choice and its durability is 10 years or more, it harms the environment'

*Sport League*

#### UNCERTAIN RESPONSE

"Yes of course, it's a whole; the sports field does not work on its own,...It's true that we're using plastic bottles, but there's a focus on custom bottles for players. Bottles for multiple uses. We are pushing for this trend.

Regarding electronic tickets, the football field started to work on this initiative, handball wanted to work on this case and considered this practice during the last African Cup, we managed to prepare the component well theoretical in terms of papers, authorization ... but unfortunately the procedure is too long, it requires good logistics ..."

*Sport Governing Body*

#### NEGATIVE RESPONSE

"Not at all, it is not important, sport is an activity, if for example the stadium wants to renew energy and apply recycling initiatives ... these practices depend on the infrastructure of the stadium, hotels or businesses ... It is not specific to the sporting activity in itself."

*Sport Governing Body*

#### NEGATIVE RESPONSE

"No. Because the involvement of sustainability practices in events forces the costs to rise. Given the nature of our work, we are in a price war which does not give us the opportunity to increase the costs linked to the organization of events.

On the other hand, if the application of sustainable practices were generalized, from where everyone would be obliged to practice sustainability measures, therefore, it would be interesting to think of sustainability in the event industry in Tunisia."

*Event Organiser*



## TUNISIA

**Relevance of event size:**

Where recognised as relevant to the industry, size is generally thought to be important; for over-riding planet health and spreading awareness.

"If this is an interesting event that will be broadcast on international channels, we are working on it to show and raise awareness of everything that is present about the importance of sustainability in the sports field as in any other field."

*Sport League*

"Yes certainly, the greatness of the event has a great impact on the participants.

It is better to educate 3000 people instead of 30. That's why the size is quite important."

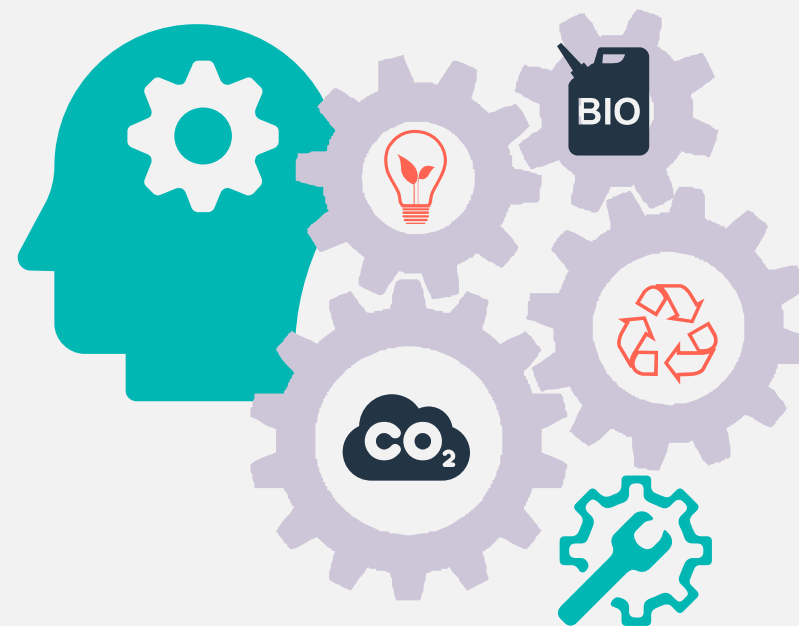
*Event Organiser*

"Yes it's important, the bigger the size of the event the sustainability becomes more a necessity."

*Sport Governing Body*

"Yes, the size of the events has a significant impact on the environment, it requires the mass consumption of disposable products, and therefore it increases the amount of waste."

*Event Organiser*





TUNISIA

## Accreditation and measurement:

Professionals do not believe the industry is in a place to require accreditation; not one had heard of ISO 20121. Measurement, by contrast, is welcome.

### ACCREDITATION

"Before thinking about the usefulness and the services provided by this certification, we must first think about the situation of Tunisia and all the regions of North Africa.

We are too far from the application of sustainable development practices, although we must focus on protecting the environment, how preserving current resources is harming the capacity of future generations.

We are too far away because there is a lack of awareness, the concept of sustainable development is not well understood by everyone."

*Event Organiser*

"Certification is not at all important in Tunisia and will have no impact if citizens are not sensitized.

Everyone must first of all be aware of the importance of sustainable development to properly involve the measures of this certification."

*Event Organiser*

### MEASUREMENT

"We can measure it environmentally; this measurement relies on the size and percentage of wastes and emissions of harmful gases. Through performance indicators, smart indicator. We could also perform an annual feasibility study of the work in sustainability, and we will have numerical results. In addition, we can deal with an independent company that can analyze the data of the studies."

*Sport Governing Body*

"Yes of course, design a protocol, before launching an event; you have to check if the determining elements of sustainability are there or not... This is the role of ISO certification, which must control the event and the progress and even measure the impact of the event."

*Event Organiser*

"Everyone will be based on a global concept, but they can be adapted from one country to another. Each country has its details."

*Event Organiser*

TUNISIA

Challenges:

Law changes and imposition plus a supporting infrastructure are real challenges in Tunisia; until such change, budget will hamper progress.

Some evidence that the more controllable initiatives around consumables can be implemented

"It is a will of the government, in a first phase it must be through awareness then as a sports or government structure it must pass to the implementation of sustainability and this by the implementation of a law.

Establish and enforce the legal framework."

Sport League

"We must first start by implementing this, the sustainability practices that do not currently exist in Tunisia. In practice, the sports, events and tourism industry do not really apply sustainable initiatives."

Event Organiser

"Do we have an infrastructure that allows us to talk about sustainability, degradable products, and environmental protection? The infrastructure does not allow us to practice this sustainability initiative well

Besides the infrastructure, the climate represents a major handicap so 'it is aggressive'."

Sport Governing Body

"Waste management is important and products for sustainable use: these are the most important elements that must be applied in Tunisia.

The essential element linked to sustainability is the consumable products; it is the element that polishes nature the most, its degradation takes time, years and years."

Event Organiser



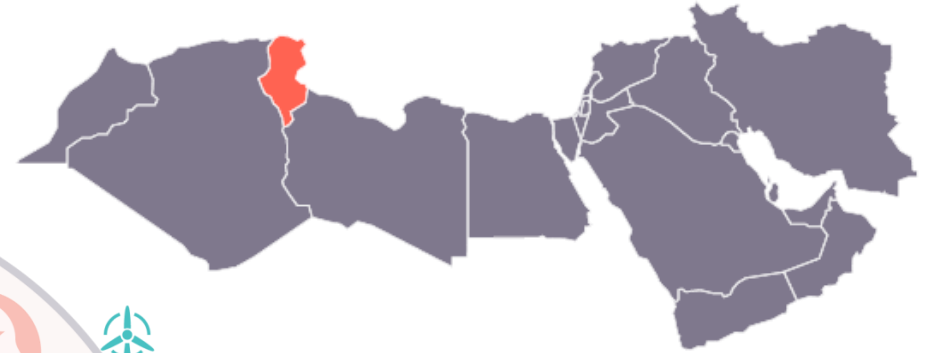
TUNISIA

# Conclusions

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TUNISIA

# Nudge, push or pull?



Before we talk about sustainability, we need to talk about infrastructure. Sustainability is a detail.."

*Sport Governing Body*

## TUNISIA

## Conclusions

Despite healthy levels of economic growth, Tunisia has some firmly established challenges in terms of economic and employment reforms. However, sustainability is a concept that is understood.

- > Good levels of awareness of sustainability and generally an appreciation of its relevance within the sport and event industry.
  - *Awareness of where this has been applied is sparse and potentially localised*
- > Sustainable initiatives appear sporadic and client driven.
- > Awareness of single-use plastic and changing consumer behaviour will be challenges and everything is driven by economic need.
- > There is a general feeling that the country has higher priorities to tackle before a sustainability conscious population and industry are a reality.

## Recommendations

Tunisia's alignment with the UN's SDGs can aid progress in all areas of social, economic and environment development. Progress will only happen with infrastructural support.

- > As a key industry sector, tourism can play a part:
  - *Employment*
  - *Likely to be driven by foreign investment*
  - *Is highly reliant on a safe and secure environment*
- > Awareness and education will need to be (private) client specific and driven
- > Many facilities and venues will likely need 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

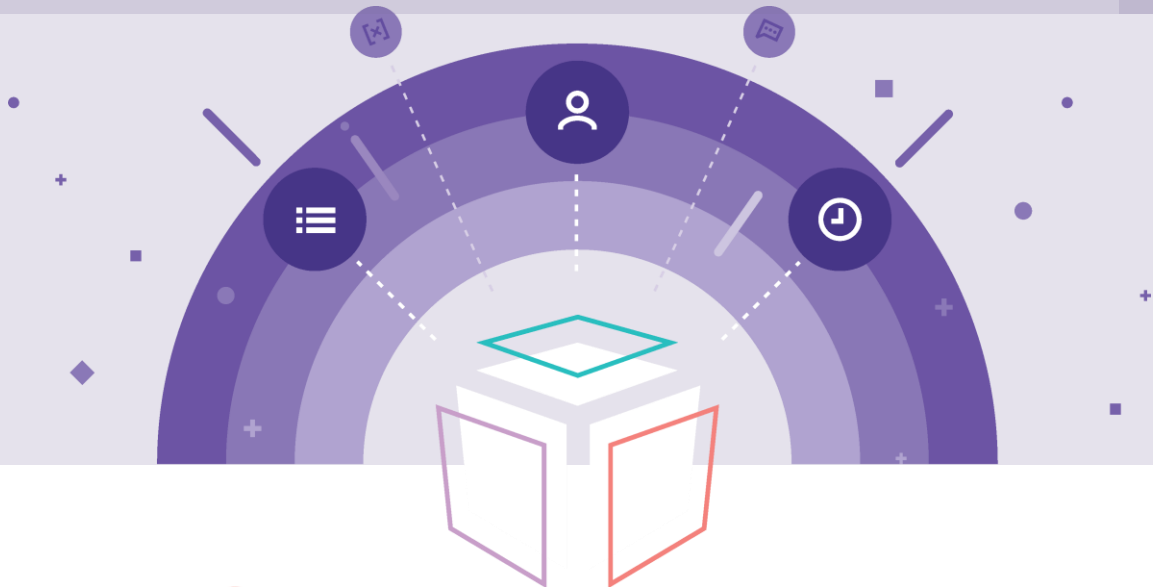
We are a global sports, sponsorship and entertainment research company, working with the industry's key players to unlock meaningful, actionable insights.



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

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