

YouGov® Sport

Middle East

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Sustainability in Sports, Events
& Tourism in the Middle East



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Executive Summary: Sustainability in the Middle East



Sustainability and what it means to people

- > Awareness and adoption of sustainability across markets is driven by older consumers with a higher education and income.
- > 'Clean energy', 'recycling' and 'reusable materials' are the most important features for consumers in their daily lives.
- > Compared to Qatar and UAE, consumers in Saudi Arabia have lower adoption in sustainability practices.

Sustainability in sports, events and tourism

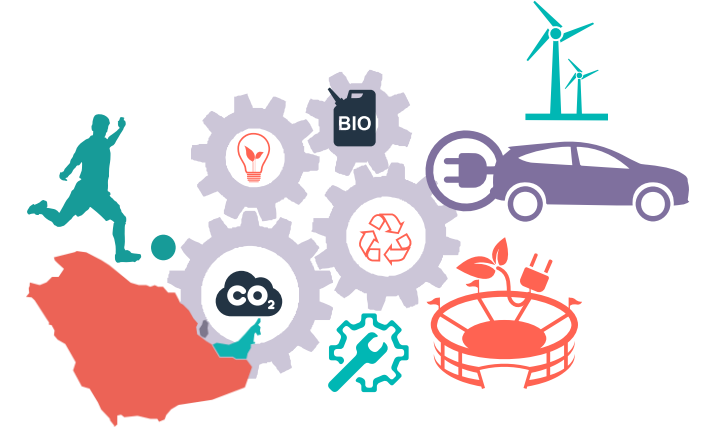
- > Sustainability is an important consideration when attending events with over 70% in each market endorsing this, placing it on a par with family suitability and ahead of food and drink options.
- > 'Digital tickets', 'designated smoking zones', 'recycling bins' and 'energy efficient lighting' are the most expected sustainability initiatives.
- > Food options i.e. locally sourced, organic and vegetarian options were the least expected sustainability initiatives.

Sustainability and the FIFA World Cup 2022

- > PR around sustainability initiatives at the FIFA World Cup in 2022 would positively impact perception of Qatar.
- > Marketing around 'digital tickets', 'separate recycling bins' and 'reduction of carbon emissions' is likely to be most impactful.

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Executive Summary: What more can be done?



Sustainability in everyday life

- > Commercial Industry and Government should continue to raise awareness of new sustainability initiatives with a particular focus on areas that are most detrimental to the environment, like carbon emissions and single use plastics.
- > Currently, sustainability is better adopted among the middle classes, so future initiatives by the government and commercial industry should specifically aim to appeal to younger consumers from lower education and income backgrounds.

Sustainability in sports

- > Events should focus on communicating the various sustainability initiatives at each stage of the consumer event journey to raise their event sustainability profile as well as improve awareness and knowledge among attendees.

Sustainability and the FIFA World Cup 2022

- > Advertise initiatives around 'Digital ticketing', 'recycling bins' and the 'reduction of carbon emissions' as these are the types of messaging that resonates most among consumers and can build positive impression and consideration of the FIFA World Cup 2022.

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Background & research methodology

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Key Areas of Exploration



Josoor Institute commissioned YouGov Sport to gauge consumers awareness and understanding of sustainability within the sports, events and tourism industry in the Middle East and North Africa

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



Sustainability and what it means to people



Sustainability in sports, events and tourism



Sustainability and the FIFA World Cup 2022

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Methodology

Research for this project was conducted in 3 phases:

QUANTITATIVE INTERVIEWS

- > Online surveys among general population using YouGov panel
- > Interview length 10 minutes
- > Achieved sample size:
 - > Qatar – 742
 - > United Arab Emirates (UAE) – 1,001
 - > Saudi Arabia (KSA) – 1,004 respondents

IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews with sports and events industry executives
- > Interview length 15 minutes
- > Executives interviewed in:
 - > Qatar – 4
 - > United Arab Emirates (UAE) – 10
 - > Saudi Arabia (KSA) – 10

DESK RESEARCH

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

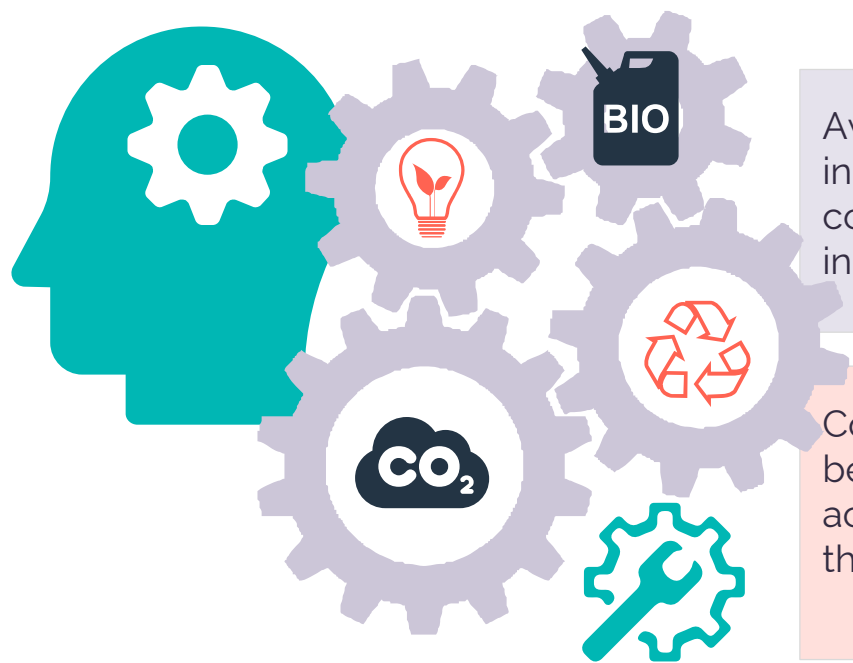
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Sustainability in everyday life and what it means to people



2

Section Summary



Awareness and adoption of sustainability in all three markets is driven by older consumers with a higher education and income.

Consumers understand 'sustainability' as being a 'long term' solution and are actively working towards sustainability in their daily lives.

Compared to Qatar and the UAE, consumers in Saudi Arabia have lower awareness and adoption of sustainability initiatives.

Most consumers are aware of 'single use plastics' and their limits but don't currently consider their banning a priority.

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AWARENESS OF SUSTAINABILITY INITIATIVES – Demographic Profiles

Across all three markets, awareness of sustainability skews towards older, more educated, higher earning consumers, while those with lower awareness are skewed towards local, younger consumers with lower education and income.

DEMOGRAPHY	SPLIT	QATAR – AWARE	QATAR – NOT AWARE	UAE – AWARE	UAE – NOT AWARE	KSA – AWARE	KSA – NOT AWARE
Age	16-24	9%	31%	11%	11%	17%	28%
	25-34	41%	33%	39%	50%	26%	26%
	35-44	28%	20%	29%	24%	29%	23%
	45+	22%	16%	22%	14%	28%	23%
Gender	Male	76%	75%	69%	64%	61%	57%
	Female	24%	25%	31%	36%	39%	43%
Nationality	Locals	10%	20%	12%	19%	68%	78%
	Expat Arabs	40%	45%	25%	25%	28%	18%
	Expat Asians	43%	24%	55%	52%	4%	4%
	Westerners / Others	8%	12%	8%	4%	1%	1%
Education	High School or below	14%	29%	15%	18%	23%	48%
	University 1 st Degree	62%	57%	50%	53%	52%	32%
	University Masters	16%	14%	18%	9%	15%	7%
Monthly Household Income	USD 1,065 or less	31%	14%	30%	46%	32%	45%
	USD 1,066 – 2,665	21%	14%	23%	10%	20%	10%
	USD 2,666 – 5,332	18%	29%	16%	4%	17%	8%
	USD 5,333 +	15%	1%	18%	8%	14%	6%

Source: YouGov Panel

More likely to be aware of sustainability initiatives

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004 Aware Qatar – 691, UAE – 911, KSA – 845, Non aware Qatar – 51 UAE – 90, KSA – 159

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SUSTAINABILITY IN THE MIDDLE EAST – PUBLIC TRANSPORT

The Metro is a major step towards ensuring a sustainable environment in the Middle East as it helps reduce pollution, traffic congestion and improve connectivity.

Qatar · Doha Metro



- 1) Opened in 2019 and has cut down rush hour traffic by 25% and travel costs by 50%.
- 2) Offers easy connectivity to all FIFA World Cup 2022 venues.

UAE · Dubai Metro



- 1) Opened in 2009 and currently services 1.5 million passengers per day.
- 2) It has reduced carbon emissions by 661,000 tonnes annually.

KSA · Riyadh Metro



- 1) Set to open in 2021, the metro is forecasted to carry 1.2 million passengers per day
- 2) It is set to reduce fuel requirements of Riyadh by 400,000 litres a day.

Source: Desk Research gulf-times.com, 2018, www.thepeninsulaqatar.com, 2019, gulf-times.com, 2020, khaleejtimes.com, 2020, gulf-times.com, 2019, riyadhmetro.sa, 2020, www.railjournal.com, 2019

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SUSTAINABILITY IN THE MIDDLE EAST – WATER MANAGEMENT

Water conservation is crucial to the Middle East as water consumption in the region is one of the highest in the world and the supply of naturally occurring water is limited.

Qatar · Kahramaa National Water Act

- > The National Water act was passed to reduce indiscriminate usage of water.
- > Campaigning for the conservation of water
- > Hefty fines for misuse of water were announced.
- > The goal of the programme is to cut water waste.

UAE · Abu Dhabi Rethink Your Lifestyle

- > The *Rethink Your Lifestyle – Save Water and Energy* campaign was Introduced by the Abu Dhabi government to raise public awareness about water and energy conservation
- > The aim is to instill a responsible attitude towards water among consumers
- > The campaign urges the public to make small, manageable contributions towards water and electricity conservation.

KSA · Qatrah Water Conversation Program

- > The National Water Company (NWC)'s National Program for Water Conservation (Qatrah) launched major campaigns across Saudi Arabia to raise public awareness of the importance of water conservation.
- > The aim is to reduce per day consumption of water.
- > The scheme promotes the prudent usage of water.

Source: Desk Research gulf-times.com, 2018, www.thepeninsulaqatar.com, 2019, gulf-times.com, 2020, khaleejtimes.com, 2020, gulf-times.com, 2019, riyadhmetro.sa, 2020, www.railjournal.com, 2019

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SUSTAINABILITY IN THE MIDDLE EAST – SOLAR POWER

Alternative energy solutions like solar energy is being harnessed to meet the electricity needs of homes across the region.

Qatar · Al Kharsaah Solar plant



- 1) Qatar's first solar power plant is scheduled to open in 2021.
- 2) Planned to supply around 10% of electricity demand of the country and will reduce CO2 emissions.

UAE · Noor Abu Dhabi solar plant



- 1) Opened in 2019, it is one of world's largest solar power plants.
- 2) Holds the capacity to meet demands of 90,000 homes.
- 3) Reduced carbon footprints 1 million metric tons per year.

KSA · Saad and Ar Rass Solar Power plants



- 1) The two plants are part of the renewables energy programme in Saudi Arabia.
- 2) These plants hold enough solar power for 60,000 homes.

Source: Desk Research u.ae/en/, 2019., www.total.com, 2020, www.renewablesnow.com, 2020

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SUSTAINABILITY IN THE MIDDLE EAST – COMMUNITY INITIATIVES

- > Awareness of sustainability in the community is the first step to long term consumer adoption.
- > There are multiple initiatives around the region focused on improving awareness and engaging with the community.

Qatar · SustainableQATAR



- 1) SustainableQATAR is a group dedicated to driving community awareness and action for environmental sustainability.
- 2) Over the course of the year, members take up challenges and use social media to raise awareness about environmental sustainability.

UAE · #ZeroWasteUAE



- 1) #ZerowasteUAE initiative from UAE based Sustainability tribe, helps raise awareness of reducing waste and creating a zero waste culture.
- 2) They provide solutions targeted at both homes and businesses.

KSA · Don't Throw it...Recycle it



- 1) King Abdul Aziz University has been holding an annual programme called 'Don't Throw it...Recycle it' since 2013 to collect used paper and cardboard as part of their community recycling initiative.
- 2) The programme has generated awareness of recycling among thousands of people in the community.

Source: Desk Research - <https://qatargbc.org/>, 2020, <https://sustainableqatar.com>, 2020, <https://www.zawya.com/mena>, 2018, <https://saudigazette.com.sa>, 2014

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SUSTAINABILITY IN THE MIDDLE EAST – SINGLE USE PLASTIC BAN

- > Single use plastic pollution is a huge problem in the region, creating massive amounts of unrecyclable waste.
- > Both federal and local initiatives have been implemented in the region to combat single use plastics - the UAE has been even more active on this front compared to Qatar and Saudi Arabia.

Qatar	UAE	KSA
<ul style="list-style-type: none"> > NO PLASTIC TUESDAYS AT SUPERMARKETS – Launched in 2019, Ministry of Municipality and Environment launched a campaign which bans single use plastic bags at supermarkets on the 3rd Tuesday of every month. 	<ul style="list-style-type: none"> > SINGLE USE PLASTIC POLICY IN ABU DHABI – Launched in 2020, this policy aims to declare Abu Dhabi 'Single Use Plastic Free by 2021'. > SINGLE USE PLASTIC BAN AT DUBAI AIRPORT – In 2020 all single use plastic items have been banned from cafés, restaurants and shops at Dubai airports > SINGLE USE PLASTIC USAGE BAN BY EMIRATES - In 2019, Emirates Airline announced its efforts to eliminate single use plastics on board all their flights. 	<ul style="list-style-type: none"> > BAN NON-BIODEGRADABLE PLASTIC PACKAGING IN SAUDI ARABIA – Launched in 2017 and implemented in phases, this policy targeted industries to reduce plastic usage.

Source: Desk Research

www.arabnews.com, 2018, Environmental Agency Abu Dhabi site . 2020, www.airport-technology.com, 2019 www.emirates.com, 2019 www.thepeninsulaqatar.com, 2020, www.expatswoman.com/Qatar, 2019, www.packagingmea.com, 2019

SPONTANEOUS WORD ASSOCIATION

SPONTANEOUS ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' – GENERAL POPULATION

Qatar

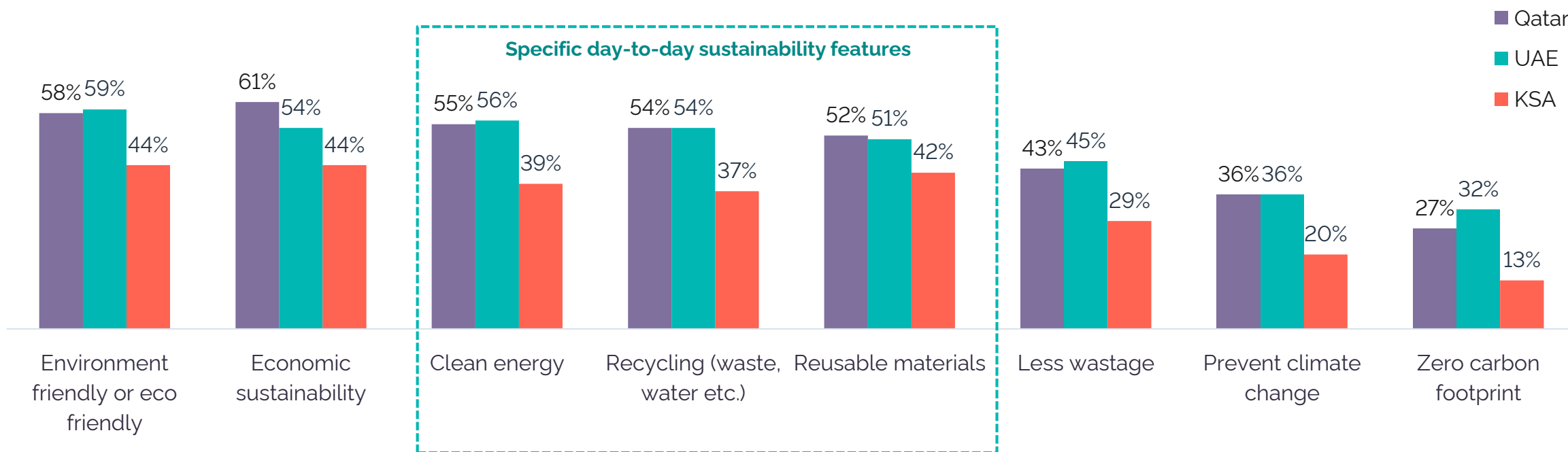


Awareness of sustainability is higher in the UAE and Qatar compared to Saudi Arabia

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Sustainability is most closely linked with the environment and the economy. Beyond this associations are day-to-day practices such as 'clean energy', 'recycling and 'reusable materials.

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' – QATAR vs UAE vs SAUDI ARABIA*



*Ranked by average % for each association across markets

Source: YouGov Panel

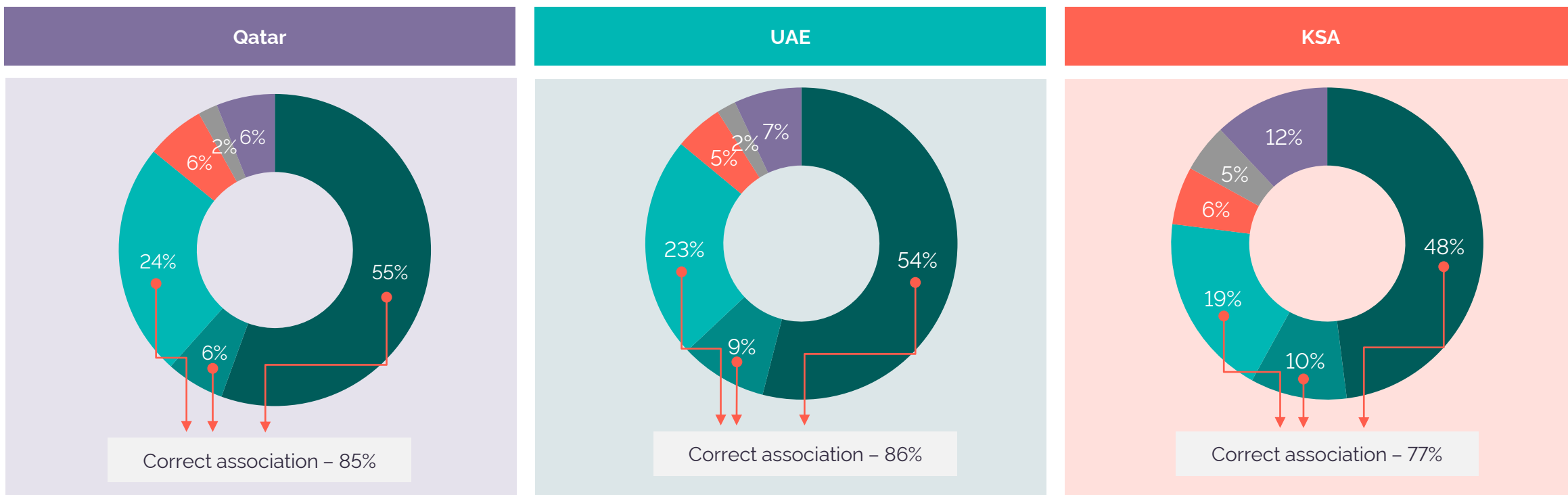
Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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

CORRECT ASSOCIATION WITH THE TERM 'SINGLE USE PLASTICS' – QATAR vs UAE vs SAUDI ARABIA

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



■ Plastic items discarded after using once
 ■ Multi-use plastic items discarded after using once
 ■ Both 1 and 2
■ Thin or weak looking plastic items
 ■ Plastics that you use many times
 ■ Don't know

Source: YouGov Panel

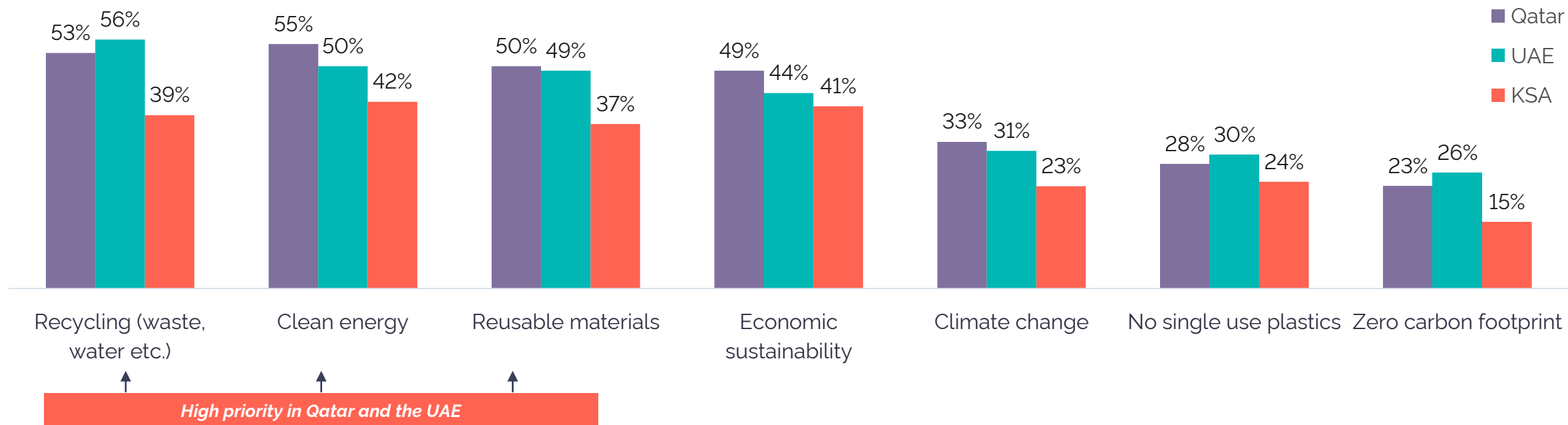
Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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Recycling and clean energy are the most important sustainability practices among consumers in their daily lives.

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – QATAR vs UAE vs SAUDI ARABIA GENERAL POPULATION*

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



*Ranked by average % for each association across markets

Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

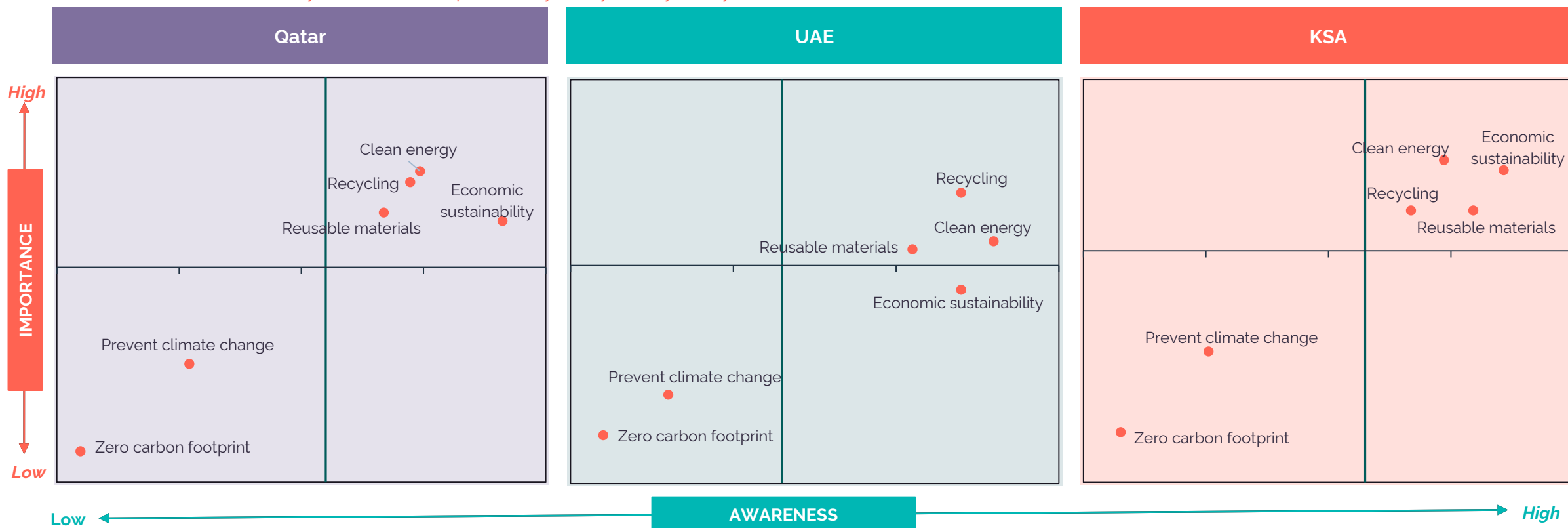
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Clean energy, recycling and reusable materials are the most widely adopted initiatives in the region
– Global issues that are perhaps less understood or less personally relevant are much lower priority

CORRECT ASSOCIATION WITH THE TERM 'SINGLE USE PLASTICS' – QATAR vs UAE vs SAUDI ARABIA

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

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



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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ADOPTION OF SUSTAINABILITY INITIATIVES – Demographic Profiles

Adopters of sustainability skew towards older, more educated, higher earning consumers across all three markets.

Locals drive non-adoption and with the Saudi population consisting of more locals, this has contributed towards lower adoption of sustainability measures in Saudi Arabia.

DEMOGRAPHY	SPLIT	QATAR – AWARE	QATAR – NOT AWARE	UAE – AWARE	UAE – NOT AWARE	KSA – AWARE	KSA – NOT AWARE
Age	16-24	9%	33%	10%	16%	17%	31%
	25-34	40%	37%	39%	49%	26%	23%
	35-44	28%	22%	29%	24%	29%	24%
	45+	22%	9%	22%	12%	28%	22%
Gender	Male	76%	76%	69%	64%	61%	56%
	Female	24%	24%	31%	36%	39%	44%
Nationality	Locals	10%	15%	13%	18%	68%	77%
	Expat Arabs	40%	43%	25%	25%	28%	19%
	Expat Asians	42%	26%	55%	49%	4%	4%
	Westerners / Others	8%	15%	8%	8%	1%	1%
Education	High School or below	14%	30%	15%	19%	24%	49%
	University 1 st Degree	63%	40%	50%	57%	52%	33%
	University Masters	17%	1%	18%	9%	15%	6%
Monthly Household Income	USD 1,065 or less	29%	40%	30%	46%	33%	41%
	USD 1,066 – 2,665	21%	20%	23%	11%	20%	10%
	USD 2,666 – 5,332	18%	20%	15%	8%	17%	8%
	USD 5,333 +	15%	1%	17%	14%	15%	5%

Source: YouGov Panel

More likely to adopt sustainability initiatives

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

Adopters Qatar – 698, UAE – 925, KSA – 858, Non adopters Qatar – 44, UAE – 76, KSA – 146

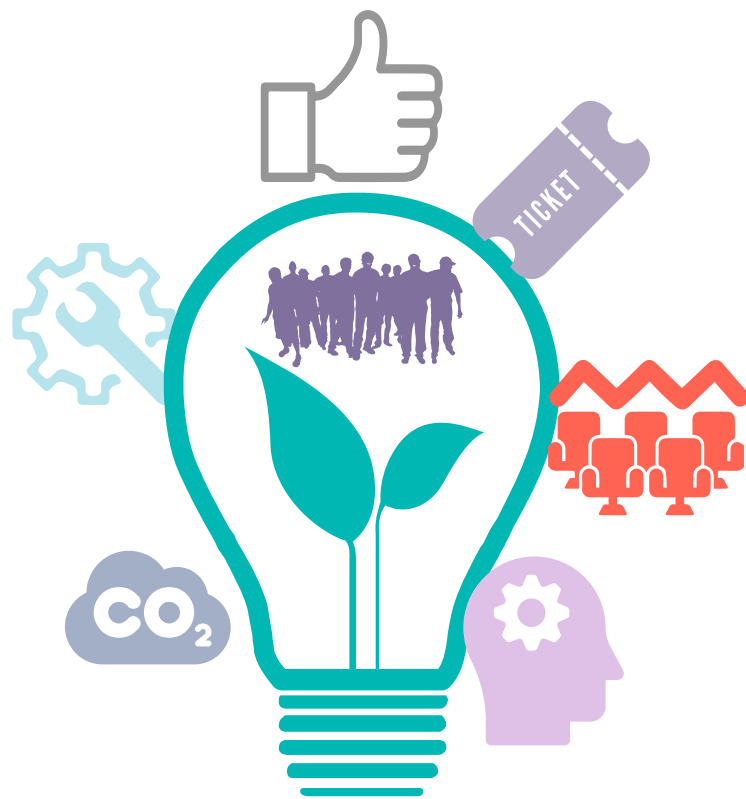
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Sustainability in sports, events and tourism



3

Section Summary



Qatari and Saudi sport event consumers tend to be older, have higher education and income, whereas in the UAE, they tend to be younger with lower income.

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

Sustainability is a relatively important factor for consumers when deciding to attend an event, with more than 70% citing its importance.

'Digital tickets', 'designated outdoor smoking zones', 'recycling bins' and 'energy efficient lighting' are the most expected sustainability initiatives at events in all three markets.

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SPORT EVENT CONSIDERERS – Demographic Profiles

Potential sports event attendees tend to be middle class in Qatar and Saudi Arabia, while in the UAE, they are more likely to be younger working class males, making them less likely to be adopters of sustainability compared to other markets.

DEMOGRAPHY	SPLIT	QATAR – AWARE	QATAR – NOT AWARE	UAE – AWARE	UAE – NOT AWARE	KSA – AWARE	KSA – NOT AWARE
Age	16-24	10%	23%	12%	10%	17%	20%
	25-34	39%	52%	43%	34%	30%	18%
	35-44	28%	16%	27%	28%	29%	25%
	45+	23%	10%	18%	28%	23%	36%
Gender	Male	77%	55%	77%	57%	67%	55%
	Female	23%	45%	23%	43%	33%	45%
Nationality	Locals	10%	10%	13%	14%	70%	71%
	Expat Arabs	40%	45%	20%	35%	25%	26%
	Expat Asians	42%	29%	59%	40%	4%	3%
	Westerners / Others	8%	16%	7%	11%	1%	1%
Education	High School or below	13%	21%	13%	19%	22%	33%
	University 1 st Degree	63%	50%	50%	51%	51%	48%
	University Masters	15%	21%	19%	15%	18%	10%
Monthly Household Income	USD 1,065 or less	30%	36%	33%	25%	32%	33%
	USD 1,066 – 2,665	19%	43%	23%	19%	23%	15%
	USD 2,666 – 5,332	19%	7%	15%	17%	19%	14%
	USD 5,333 +	16%	1%	18%	18%	16%	14%

Source: YouGov Panel

More likely to consider attending sports

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

Considerers Qatar – 687, UAE – 614, KSA – 523, Non considerers Qatar – 55, UAE – 387, KSA – 481

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Sustainability in sports and events have become a top priority for officials and industries as identified by UN Policies.



The UN has agreed that **sport facilities, events and activities** have a **negative impact on the environment** through:



Noise and light pollution



Consumption of non-renewable resources



Consumption of natural resources



Emission of greenhouse gases



Soil and water pollution from pesticide use



Soil erosion



Waste generation

Source: Case study of event sustainability from James Stibbs and Tony Hanscomb

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To address the sustainability challenge, the UN *'Sports for Climate Action Framework'* was initiated as part of the Paris Climate Change.



The Framework is a movement for the sports sector aimed at ensuring that its members play their part in carbon reduction and prioritises five principles:

Undertake systematic efforts to promote greater environmental responsibility

Reduce overall climate impact

Educate for climate action

Promote sustainable and responsible consumption

Advocate for climate action through communication.

The framework also asks **sport to use its platform to communicate** the need for positive change in others

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EVENT CASE STUDIES

– Sustainability in Sport & Leisure



22 November 2018 ·

#TBT to when Averda partnered with DP World Tour Championship in Dubai, a world class golf and social event and the final tournament of the European Tour's Race. In addition to providing cleaning services, we also placed vending machines for all plastic bottles.



UAE · DP World Championships

Dubai's premier European Tour Golf tournament has been highlighting its sustainability through its various recycling partners. Digital tickets instead of paper options. Sustainable initiatives include:

- > Waste sorting smart bins around the course to encourage waste sorting.
- > 'Reverse Vending Machines' (RVMs) can be used to drop used plastic bottles and get branded souvenir golf balls as gifts.
- > The RVM initiative led to 50,000 attendees returning 75,000 bottles and cans to the machines.

Sports events in the Middle East have embraced sustainability into their strategies by improving the spectator awareness and interaction with sustainability events.



KSA · Formula E Diriyah E-prix

Riyadh has hosted a round at the Formula E Diriyah E-prix since 2018. Along with sustainable infrastructure there are several measures aimed at spectators. Sustainability initiatives include:

- > Single-use plastic water bottles have been phased out at all Formula E events since January 2019.
- > Recycling stations are setup across the venue to collect other plastic bottles.
- > Free public bus service with multiple pick-up points around the city, with easy access to the venue.
- > E-ticketing + E-visa scheme to attend the race reduces use of paper.

Source: Desk Research cycled.no, 2018, Averda twitter account, 2018, European tour, 2014 fiaformulae.com, 2020, Zawya.com, 2019, english.aawsat.com, 2018, www.arabnews.com, 2018

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TOURISM CASE STUDIES

– Sustainability in Sport & Leisure

**KSA · The Red Sea Project**

The Red Sea Project is a new tourism destination being built in Saudi Arabia as part of Saudi Vision 2030. Sustainability initiatives include:

- > Number of visitors will be carefully managed to avoid over-tourism and hence protect the natural environment.
- > A range of policies that incorporate renewable, zero waste-to-landfill, carbon neutrality and a total ban on single use plastics have been planned.
- > Eco tourism will give tourists a chance to safely interact with the natural beauty of the region in a sustainable manner.

New and planned tourist attractions incorporate sustainability measures as part of their infrastructure as well as visit strategy

**UAE · Dubai Frame**

Dubai Frame, one of the newer entrants in Dubai's tourist sites has incorporated solar energy into its design to make it one of Dubai's most sustainable landmarks. Sustainability initiatives include:

- > The exterior of Dubai Frame is made of a unique photovoltaic glass façade.
- > Its design provides Dubai Frame with a golden hue along with harnessing solar power.
- > The total power generated enables the building sustain most of its own power.
- > It also prevents greenhouse effect with UV & IR filters.
- > The photovoltaic glass façade has led to the facility reducing 37% of its air conditioning (HVAC.)

Source: Desk Research <https://bloolooop.com/features/red-sea-project/>, 2020, www.theredsea.sa, 2020 english.alarabiya.net, 2020, medium.com/the-belnor-blog, 2018

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VENUE CASE STUDY

– Sustainability in Sport & Leisure



UAE · Coca-Cola Arena

The Coca-Cola Arena in Dubai is the Middle East's largest fully air conditioned indoor arena. Designed with sustainable features as central to the build, it's gates opened in 2019. Sustainability initiatives include:

- > LED lights used in the venue as well as the venue complex.
- > Humidity capture ACs are more efficient than traditional units.
- > Motion sensors for lights automatically switch off lights thus improving efficiency.
- > Water sensors in toilets and around the venue help save water.
- > Organic composter in the complex helps in effective waste management.
- > Digital tickets instead of paper options.
- > Venue is easily accessible by public transport and the management actively encourages customers to use public transport on event days.

Source: Desk Research en.coca-colaarabia.com, 2019

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INDUSTRY EXPERIENCE CASE STUDY

– Sustainability in Sport & Leisure



UAE · Dubai Tennis Championships

Dubai Tennis Championships, the premier ATP event hosted by Dubai Sports Council has adopted many consumer facing sustainability initiatives during tournament days. Sustainability initiatives include:

- > Waste sorting bins that allow customers to segregate plastics, metal, paper and general waste.
- > LEDs around the complex lit up using solar energy instead of generators.
- > Limited plastic usage in the venue seating.
- > Venue is accessible by Dubai Metro, thus helping fans reduce usage of private cars to commute to the venue.

“There has to be training, more awareness, care and encouragement. This will make a huge difference in the success of these events.”

Sport Ministry

Source: YouGov Sport Interview with a Tourism General Manager

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COMMUNICATION STRATEGY CASE STUDIES

– Sustainability in Sport & Leisure

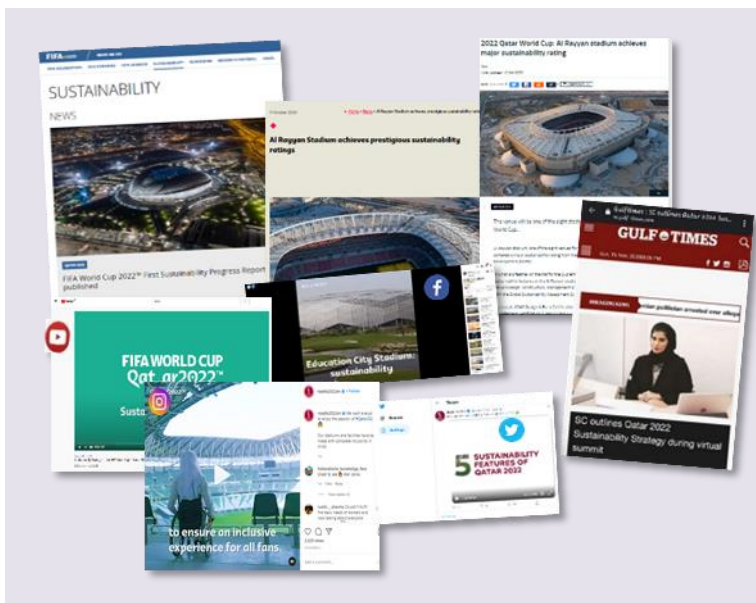
Marquee events and projects in the three markets have sustainability at the heart of their strategy.

"It has to be through influencers..., whether on social media, in event, in sports games, you attract the world through this topic, because when these small details are included in an event or concert commercial, or sport match, it will attract people."

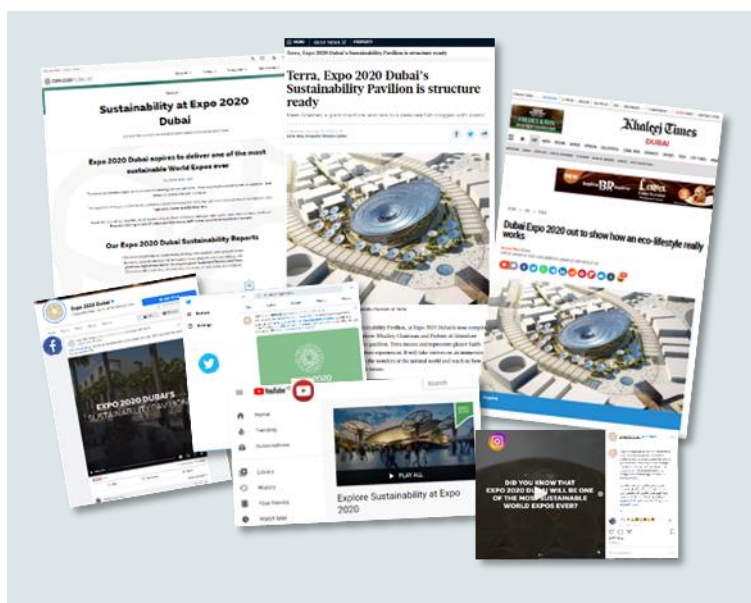
Events Producer, UAE

Examples: Websites, online and print press along with social media are all being used through an integrated communication plan to send out a consistent message.

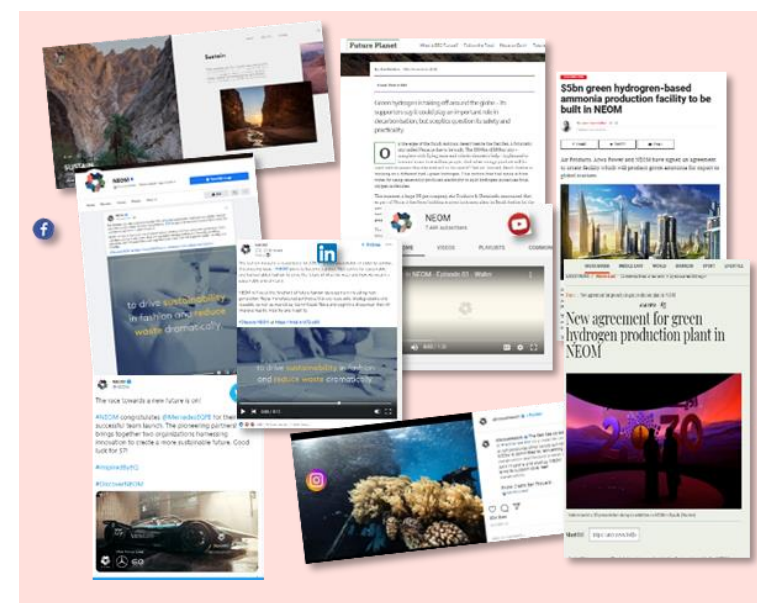
Qatar · FIFA World Cup 2022, Qatar



UAE · Expo2020 Dubai



KSA · NEOM



Source: Desk Research & YouGov Sport interview with an Events Producer working in UAE

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Example: Consumer Journey

Ultimately, the goal for sustainability at events and sports venues is to implement initiatives at every stage of the consumers journey, thereby maximising exposure and raising awareness.

	1	2	3	4	5	6	7
STAGE	Awareness / PR of Events	Buy tickets	Commute to and from	Entrance and movement around the venue	Food & Beverages	Waste Disposal	Toilets & Recreation
SUSTAINABILITY INITIATIVES	<ul style="list-style-type: none"> > Digital source > Recyclable newspapers > No pamphlets > Solar powered billboards 	<ul style="list-style-type: none"> • Digital payments • Digital tickets 	<ul style="list-style-type: none"> • Public buses • Metro • Carpooling 	<ul style="list-style-type: none"> • Electronic ticket scanning machines • Electric powered transportation within venues (e.g.. Golf buggies) • Disabled friendly access 	<ul style="list-style-type: none"> • Locally sourced food • More vegetarian/vegan options • No single use plastic cutlery • Paper bags instead of plastic ones • Reusable bottles • Cutlery made of recyclable materials 	<ul style="list-style-type: none"> • Recycling stations • Reverse Vending Machines (RVMs) • Waste segregation bins 	<ul style="list-style-type: none"> • Water saving sanitary-ware in toilets • Air hand dryer in toilet instead of paper • Motion sensor taps and lights • Designated outdoor smoking areas

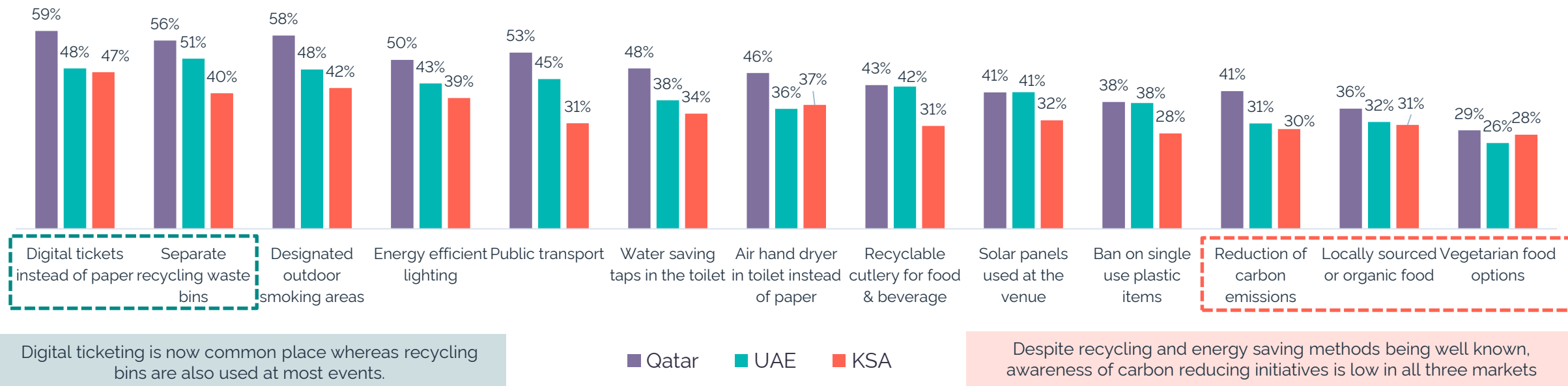
Source: Desk Research

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'Digital tickets', 'recycling bins' and 'designated outdoor smoking areas' are consistently the highest ranking sustainability features. Awareness of sustainability initiatives is higher in Qatar and the UAE.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – QATAR vs UAE vs KSA GENERAL POPULATION

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



Source: YouGov Panel

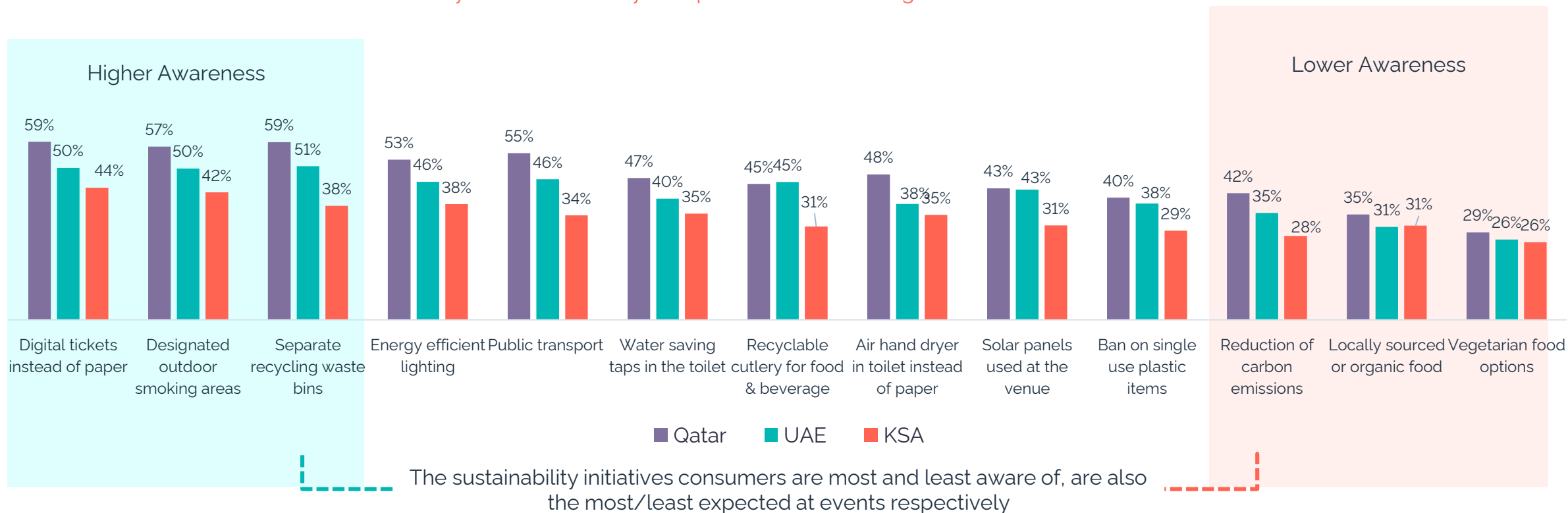
Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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'Digital tickets', 'recycling bins' and 'smoking spaces' are the most expected sustainability initiatives at events across all three markets - Sustainability expectations at events are highest in Qatar followed by UAE and Saudi Arabia.

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – QATAR vs UAE vs KSA GENERAL POPULATION

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



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

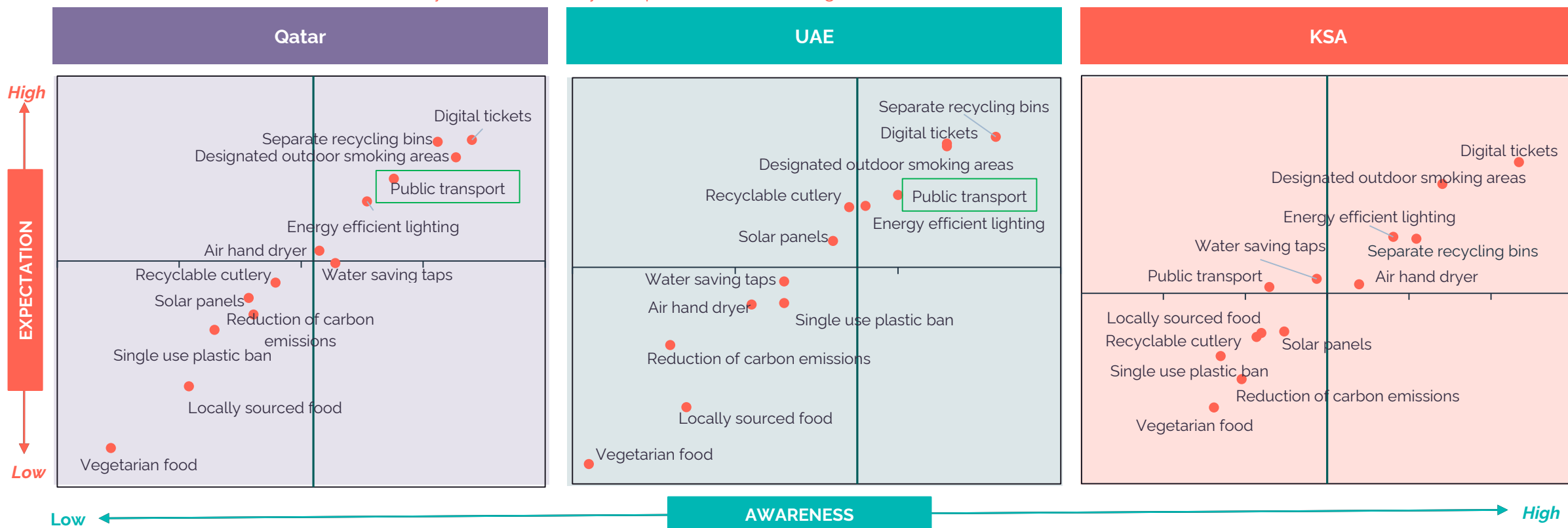
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'Digital tickets', 'designated outdoor smoking zones', 'waste sorting bins' and 'energy efficient lighting' are consistently the most top of mind initiatives among consumers. **Public transport** has greater awareness and expectation by consumers in **Qatar** and the **UAE**

SUSTAINABILITY MEASURES AT EVENTS – AWARENESS VS EXPECTATIONS

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

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



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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Relative importance of sustainability as a decision factor is higher in Qatar and the UAE compared to Saudi Arabia

Sustainability is not a high ranking priority when deciding whether to attend an event, that said, more than 7 in 10 still endorse the importance.

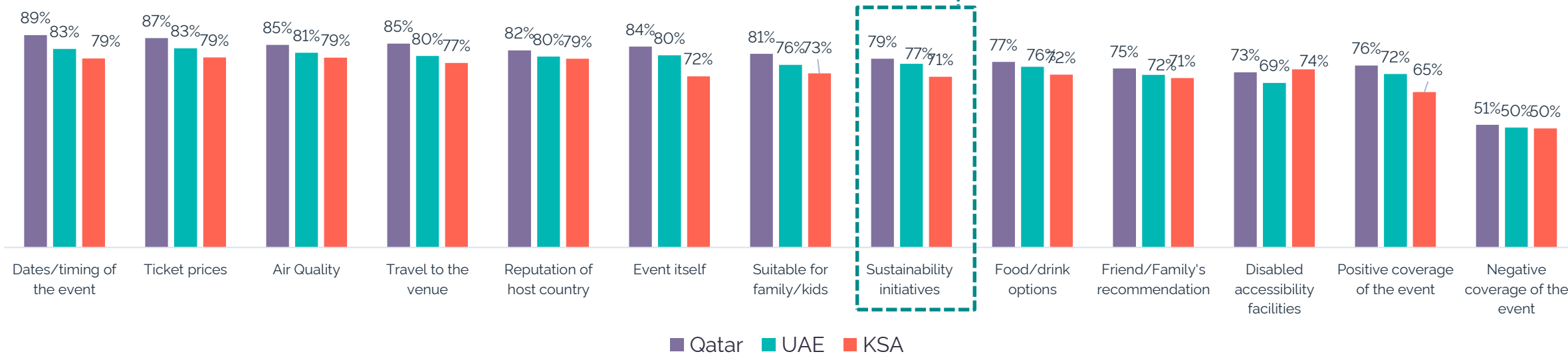
FACTORS IMPORTANT WHILE DECIDING TO ATTEND EVENTS– QATAR vs UAE vs KSA GENERAL POPULATION

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

Importance of sustainability

Qatar – Rank 8/13, UAE – Rank 7/13, KSA – Rank 10/13

Although an important feature for most wanting to attend an event, sustainability is lower priority than financial and logistical factors like price, timings, travel, event itself and host reputation



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

Public transport would also impact consumers in Qatar and the UAE

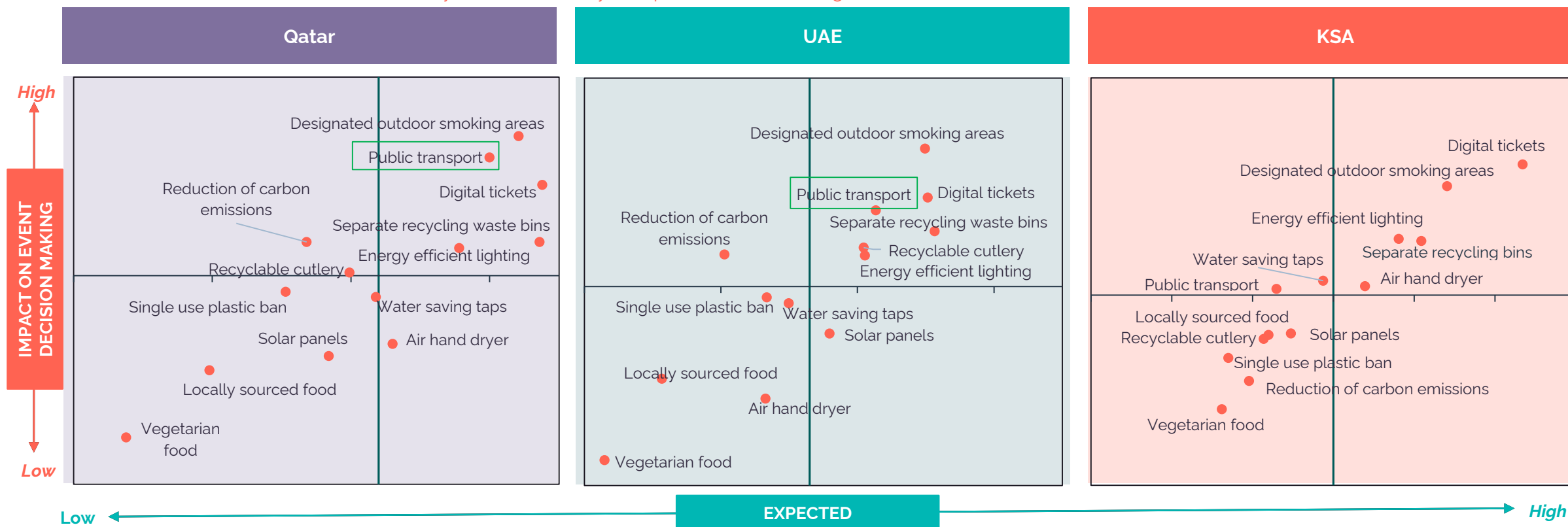
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'Digital tickets', 'designated outdoor smoking zones', 'recycling bins' and 'energy efficient lighting' are initiatives all markets find important and would also positively impact their decision to attend an event.

SUSTAINABILITY INITIATIVES AT EVENTS – IMPACT ON DECISION MAKING

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

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



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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Industry professionals in all three markets agree that digital ticketing and recycling bins are the easiest sustainability facilities to implement.

EASILY IMPLEMENTED SUSTAINABILITY INITIATIVES

Qatar

EASY TO ADOPT – Most environmental sustainability measures should be easy to adopt provided they are made mandatory with clear usage signs and directions

- > Recently introduced measures like public transport for travel to stadiums will be adopted easily by residents and visitors alike by time the World Cup 2022 starts.

UAE

EASY TO ADOPT – Measures that have become common place at events

- > Digital tickets and payment
- > Digital ticket scanner
- > Usage of recycling bins

"Easy ones are the ones we implement in our daily lives, such as waste sorting, avoiding the use of paper and reducing the use of paper."

Tourism Government, UAE

KSA

EASY TO ADOPT – Most measures designed for public participation, especially conceptually simple solutions like.

- > Digital tickets
- > Single use plastic ban
- > Usage of recycling bins

"Almost all what I mentioned can be implemented but it depends on the budgets and the awareness of the receiver and the initiatives. Using recycling bins is easy, using biodegradable utensils is easy."

Tourism Government, KSA

Source: YouGov Sport Interviews with a Sports/Events/Tourism Executives in Qatar, UAE, KSA

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Raising awareness of wider sustainability practices and fostering an environmentally friendly culture are the key challenges in the region

TOUGHER TO IMPLEMENT SUSTAINABILITY INITIATIVES

Qatar

TOUGHER TO ADOPT – Getting consumers to respect sustainability guidelines.

- > Compliance remains an issue at events as venues/event holders struggle to enforce sustainability initiatives
- > Awareness and adoption of sustainability initiatives

"Implementation by the host of the event is not tough. The idea goes back to the receiver. Does he accept such things or not? Is he able to interact with them or not? It depends on the culture and the education of the receiver."

Sports Ministry, Qatar

UAE

TOUGHER TO ADOPT – Initiatives that require change in deep seated habits.

- > Adoption of Metro/Buses for venues
- > Elimination of cheap and abundant single use plastics.
- > Awareness and adoption of sustainability initiatives.

"The tough ones are using solar energy because it's expensive and produces less power than the traditional source of electricity. Also, eco-friendly transport because it depends on the event's budget."

Tourism Government, UAE

KSA

TOUGHER TO ADOPT – Initiatives that require long term investment.

- > Establishing a 'sustainability' culture in the country.
- > Awareness and adoption of sustainability initiatives.

"There is a lack of specialist companies that offer solutions. We might also end up working with the wrong company and bring bad products. So we need high-level partners."

Events Industry, KSA

Source: YouGov Sport Interviews with a Sports/Events/Tourism Executives in Qatar, UAE, KSA

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Sustainability and the FIFA World Cup 2022



4

Section Summary



Across markets, those considering attending the FIFA World Cup 2022 are more likely to be males with higher income and education, which makes them a good fit as potential adopters of sustainability measures at events.

Awareness of sustainability initiatives at the FIFA World Cup 2022 is significantly higher among attendee considerers.

Across the three markets, digital ticketing and designated outdoor smoking areas are the most expected sustainability initiatives among potential attendees.

PR around sustainability initiatives at the FIFA World Cup would leave a positive impact on audience perceptions of Qatar itself.

Marketing focused on 'digital tickets', 'separate recycling bins' and 'reduction of carbon emissions' is likely to have the most traction among consumers in the region.

Communications about 'vegetarian food options' and 'designated outdoor smoking areas' would make little impact and could potentially deter potential attendees.

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FIFA WORLD CUP 2022 – Demographic Profiles

Across the three markets, those who consider attending the FIFA World Cup 2022 are more likely to be males with higher income and education.

DEMOGRAPHY	SPLIT	QATAR – AWARE	QATAR – NOT AWARE	UAE – AWARE	UAE – NOT AWARE	KSA – AWARE	KSA – NOT AWARE
Age	16-24	10%	12%	11%	11%	14%	22%
	25-34	38%	48%	42%	38%	29%	24%
	35-44	29%	21%	27%	29%	31%	27%
	45+	23%	18%	20%	22%	26%	28%
Gender	Male	77%	72%	79%	61%	70%	55%
	Female	23%	28%	21%	39%	30%	45%
Nationality	Locals	11%	9%	13%	13%	66%	71%
	Expat Arabs	39%	42%	22%	26%	30%	25%
	Expat Asians	43%	35%	57%	53%	3%	3%
	Westerners / Others	7%	14%	8%	8%	1%	1%
Education	High School or below	13%	19%	12%	17%	20%	31%
	University 1 st Degree	63%	54%	51%	50%	55%	45%
	University Masters	15%	19%	20%	15%	17%	12%
Monthly Household Income	USD 1,065 or less	30%	30%	30%	32%	28%	38%
	USD 1,066 – 2,665	18%	35%	26%	19%	23%	16%
	USD 2,666 – 5,332	18%	19%	16%	13%	22%	12%
	USD 5,333 +	17%	3%	18%	15%	18%	11%

Source: YouGov Panel

More likely to Consider attending the World Cup

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004 Considerers Qatar – 581, UAE – 428, KSA – 352, Non considerers Qatar – 161, UAE – 573, KSA – 652

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FIFA World Cup 2022 Sustainability Strategy

FIFA World Cup 2022 sustainability strategy is a joint effort between FIFA and the local organising committee in Qatar and is in line with UN's Sustainable Development goals - a collection of 17 goals designed to "achieve a better and more sustainable future for all" and intended to be achieved by 2030.

HUMAN

- > Develop human capital and safeguard workers' rights

GOVERNANCE

- > Set an example of good governance and ethical business practices

ECONOMIC

- > Catalyse economic development

ENVIRONMENTAL

- > Deliver innovative environmental solutions

SOCIAL

- > Provide an inclusive tournament experience



Source: FIFA World Cup 2022 Sustainability Strategy

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Sustainability at the FIFA World Cup 2022

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

CONSUMER FACING SUSTAINABILITY INITIATIVES

PRE-EVENT

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

AT STADIUMS

- > Recycling bins inside all stadiums and around the complex
- > Energy efficient lighting at stadiums
- > Water saving sanitary ware across all stadiums
- > Reduction of single use plastics usage to serve food & beverage

POST-TOURNAMENT

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

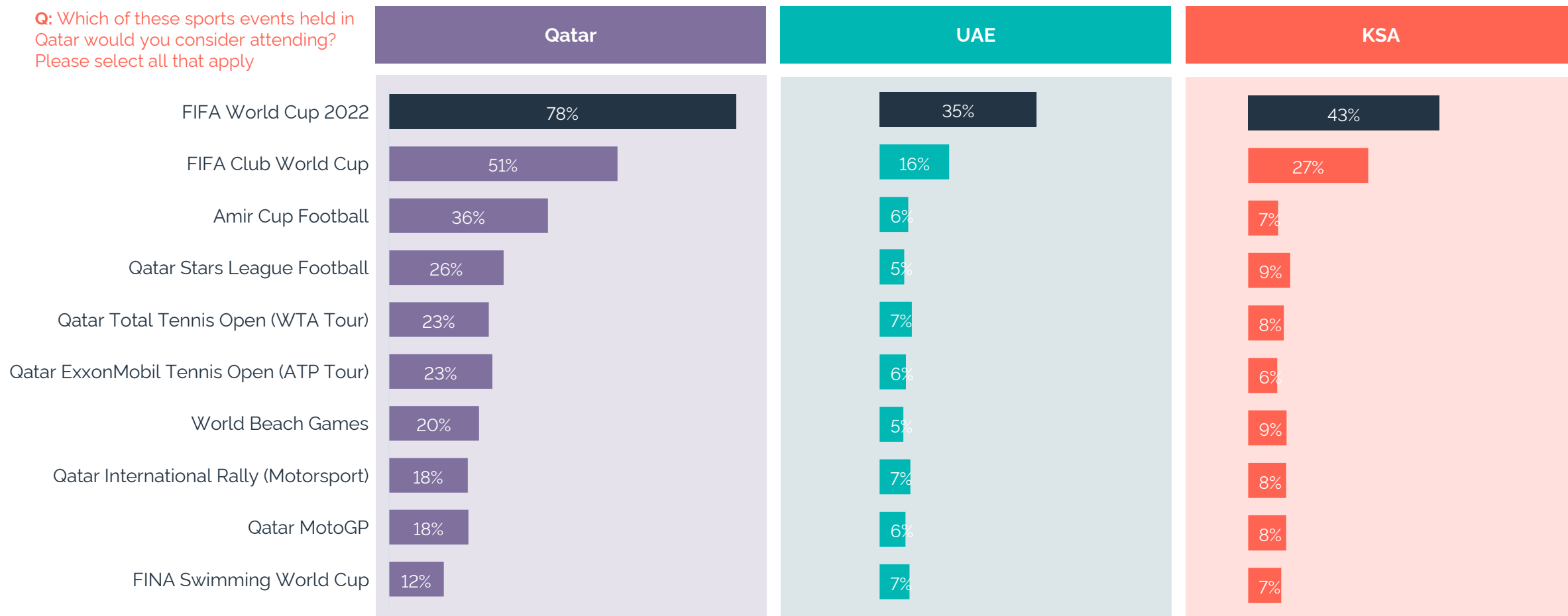
Source: FIFA World Cup Sustainable stadiums document, YouGov Panel

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Across markets, consideration of the FIFA World Cup in 2022 is the highest of any sport event in Qatar.

CONSIDERATION OF SPORTS EVENTS HOSTED IN QATAR

Q: Which of these sports events held in Qatar would you consider attending?
Please select all that apply



Source: YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1004

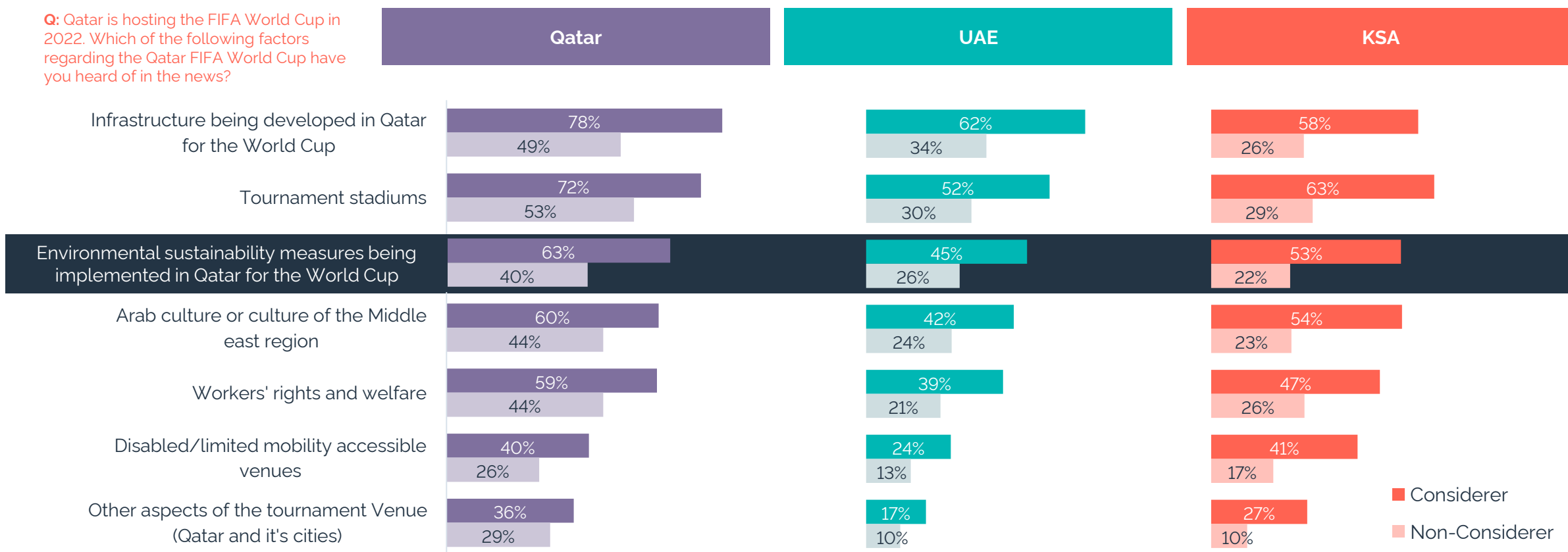
Awareness of all factors is highest in the host nation.

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Nearly two-thirds of considers in Qatar have heard news regarding 'environmental sustainability' in the news, the third highest ranked factor.

CONSIDERATION OF SPORTS EVENTS HOSTED IN QATAR

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



Source: YouGov Panel

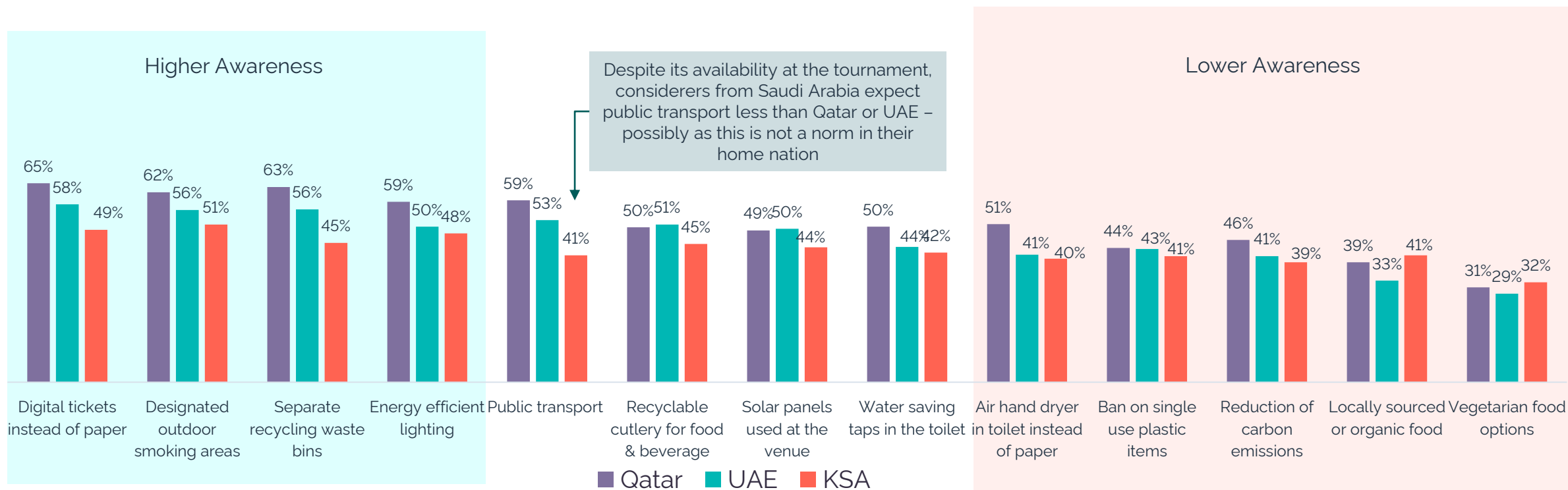
Sample Size: Considerers Qatar – 581, UAE – 428, KSA – 352 Non considerers Qatar – 161, UAE – 573, KSA – 652

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Digital ticketing and designated outdoor smoking areas are the most expected sustainability initiatives across markets.

EXPECTED SUSTAINABILITY INITIATIVES AT FIFA WORLD CUP 2022 (AMONG CONSIDERERS)

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



Source: YouGov Panel

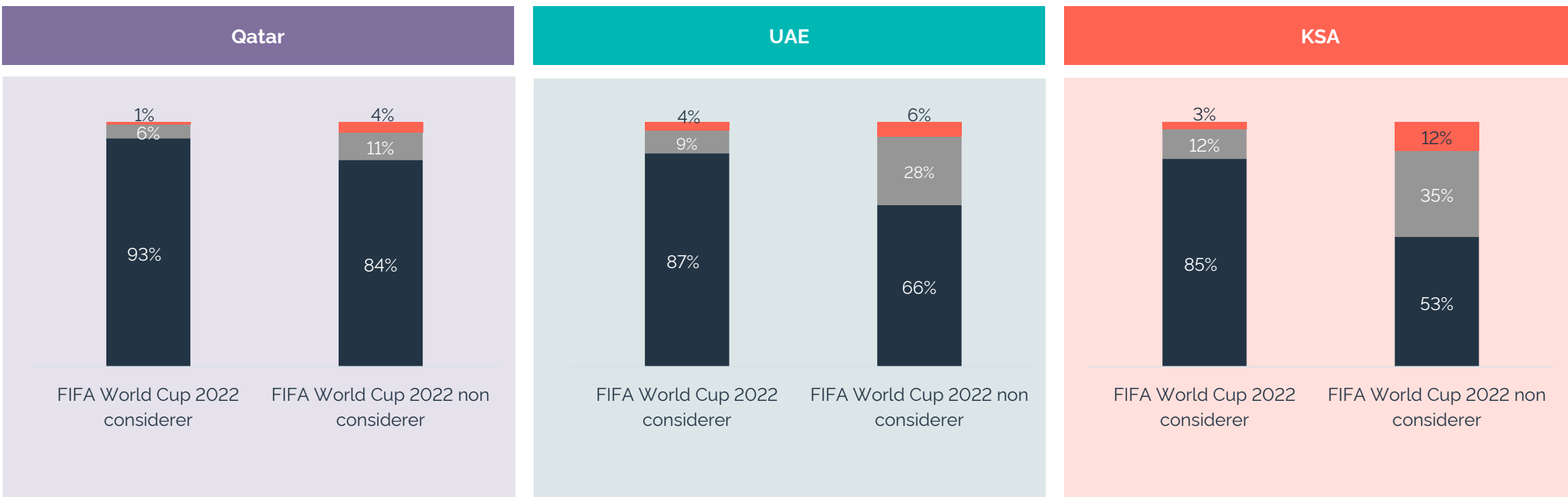
Sample Size: Considerers Qatar – 581, UAE – 428, KSA – 352

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Messaging about sustainability initiatives at the 2022 World Cup is likely to leave a stronger positive impression about Qatar on consumers planning on attending vs those who are not.

CHANGE IN PERCEPTION OF FIFA WORLD CUP 2022 DUE TO PR ON SUSTAINABILITY INITIATIVES

Q: If you knew that Qatar was implementing several sustainability initiatives at the host cities and stadiums like public transport, recyclable materials, solar panels etc for the FIFA World Cup 2022, how would this change your perception towards Qatar as a country?



Source: YouGov Panel

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

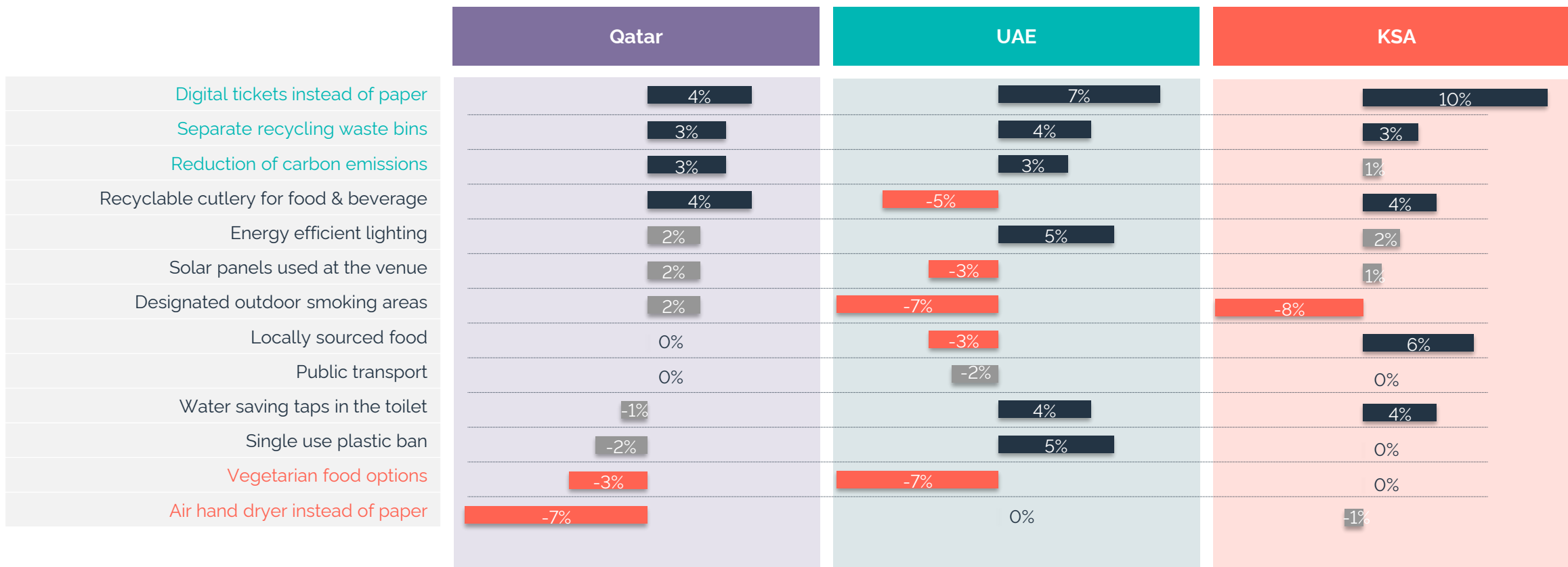
Sample Size: Considerers Qatar – 581, UAE – 428, KSA – 352
 Non considerers Qatar – 161, UAE – 573, KSA – 652

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'Digital tickets', 'separate recycling bins' and 'reduction of carbon emissions' are the types of messaging that will likely have a positive impact on consumers.

Conversely communicating 'vegetarian food options' and 'designated outdoor smoking areas' will have a negative impact on the consideration across markets and hence communicating these can be avoided

IMPACT OF PR OF EACH SUSTAINABILITY MEASURE ON CONSIDERATION OF FIFA WORLD CUP 2022



Positive Impact Neutral Impact Negative Impact

Source: Advanced Logistic Regression Modelling of data from YouGov Panel

Sample Size – Total – 2,747, Qatar – 742, UAE – 1,001, KSA – 1,004

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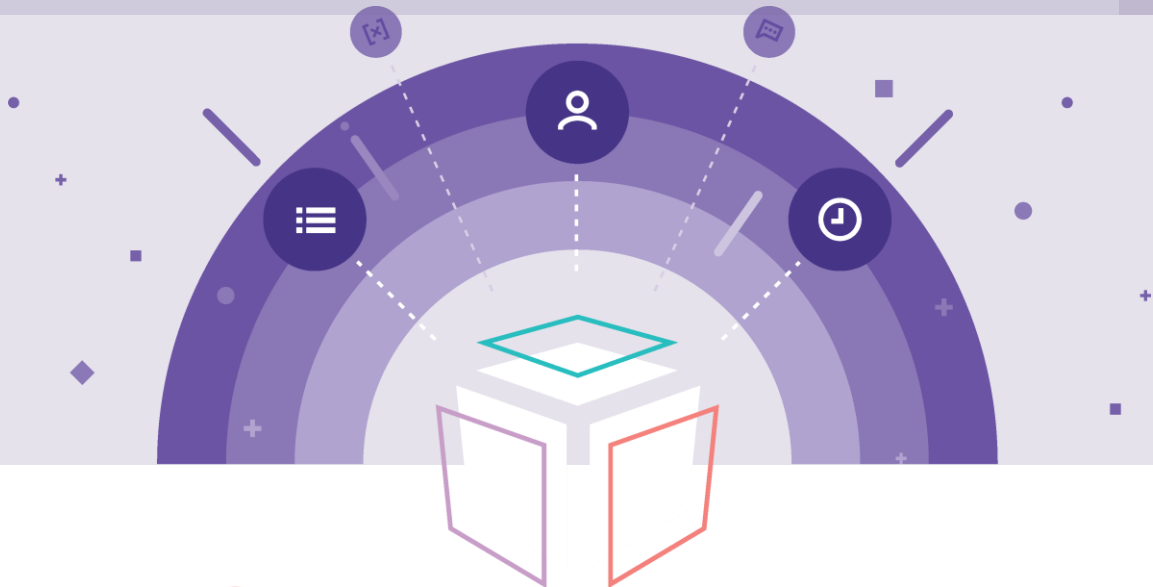
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Economic Impact Assessment	RealTime / Omnibus Surveys
	Bespoke Consumer Surveys