



YouGov[®] Sport

United Arab Emirates

Sustainability and its impact
in sport, events and tourism
in the UAE



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CONTACT

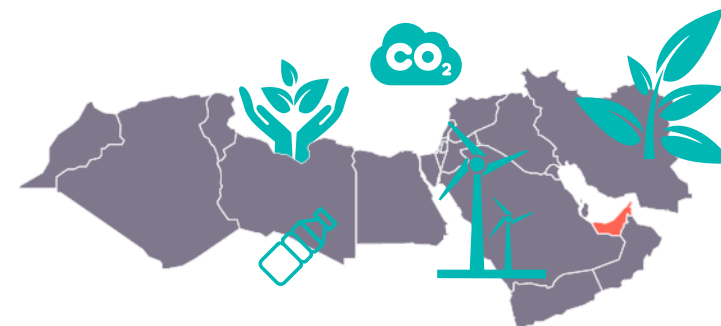
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Executive Summary: Sustainability in the UAE



Sustainability and what it means to people

- > The UAE faces many environmental challenges that put a tremendous amount of pressure on resources.
- > Government and commercial industries are working towards raising awareness about sustainability across a range of initiatives.
- > Older middle-class consumers are more willing to adopt sustainability initiatives, while younger, working class people need more convincing.
- > Awareness of sustainability is good in the UAE, with most consumers adopting recycling and energy saving initiatives in their daily lives.

Sustainability in sports, events and tourism

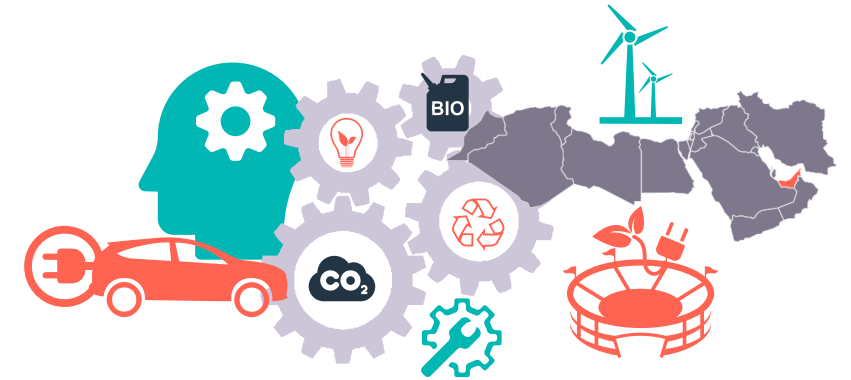
- > The average sports fan tends to be younger males and therefore less likely to adopt sustainability initiatives.
- > Recycling facilities are implemented well at sports events but other initiatives need to be communicated better to consumers.
- > Effective PR can help drive messaging and should be broadcast across multiple channels as well be present throughout the consumers experience at events.
- > While some sustainability features will be easier to adopt, some habitual behaviors will require significant awareness to shift perceptions.

Sustainability and the FIFA World Cup 2022

- > Sustainability at the World Cup is higher on consumers radar, with ticketing and recycling features coming to the fore.
- > PR around sustainability would have an impact on consumers with communications around energy and single use plastics likely to be the most influential.

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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

- > Sports venues and event holders should aim to communicate which sustainability features are available at events in order to make them aware of new initiatives and improve their sustainability profile, and therefore making it more likely for consumers to expect them in the future.
- > Events should exhibit a variety of clearly visible sustainability facilities at every stage of a consumers journey to raise awareness about specific initiatives and potentially open new lines of communications with those less likely to adopt sustainability in their daily lives (namely young males) with the aim of converting them into adopters.

Sustainability and the FIFA World Cup 2022

- > Advertise initiatives around efficient usage of energy and waste management, with particular focus on reducing single use plastics and recycling facilities
- > FIFA should remain an inclusive organisation but marketing around food options and smoking areas should be subtle in comparison to bigger more evocative messaging

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Background & research methodology

1

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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: 1,001 respondents

IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry executives
- > Interview length 15 minutes
- > Executives interviewed in the UAE – 10

DESK RESEARCH

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

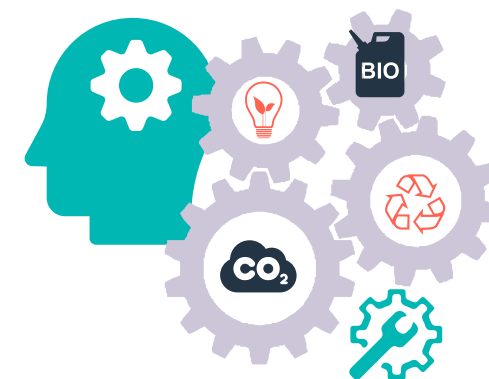
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Sustainability in everyday life and what it means to people



2

Section Summary



The UAE faces many environmental challenges, especially with regards to waste generation and carbon footprints.

Commercial industries and government are developing initiatives to reduce damaging effects on the environment

Consumers understand 'sustainability' as being 'eco friendly' and are actively working towards economic sustainability in their daily lives.

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

Recycling, clean energy and reusable materials are the most valued sustainability initiatives for consumers and are therefore the most readily adopted in daily life.

Older, more educated and higher income earning demographic groups are more likely to be aware of, and adopt sustainability initiatives than younger, less educated and lower income groups.

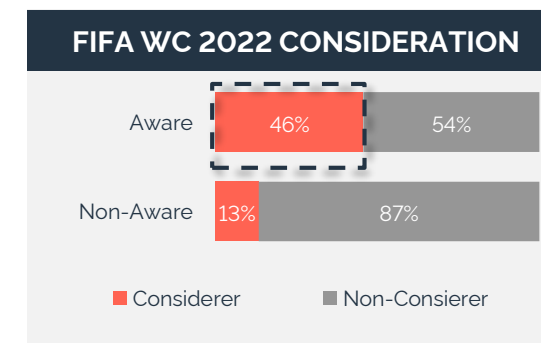
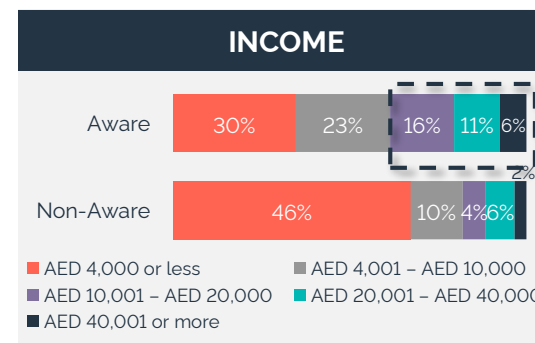
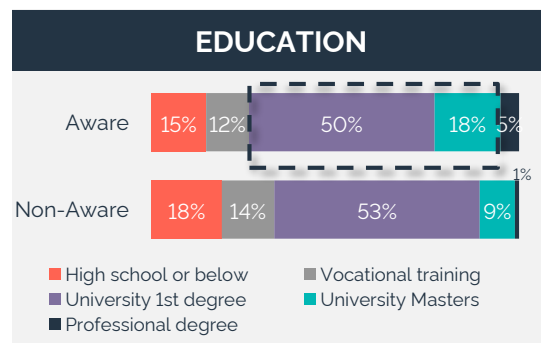
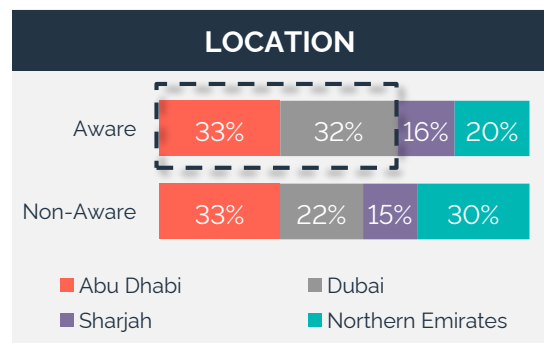
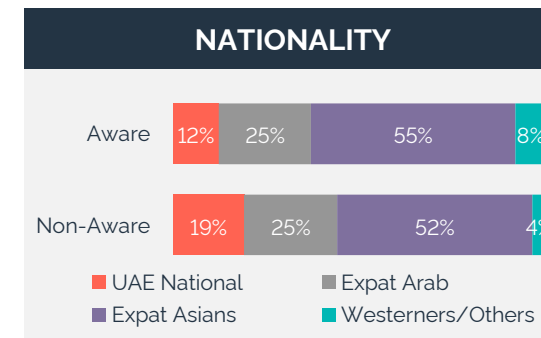
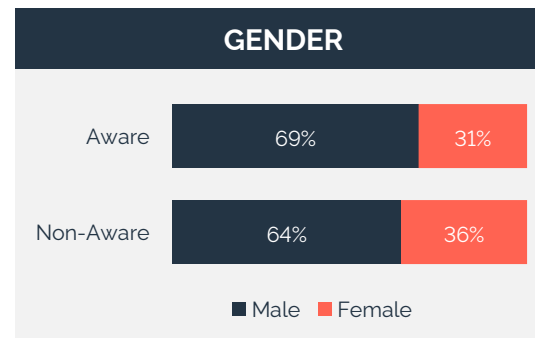
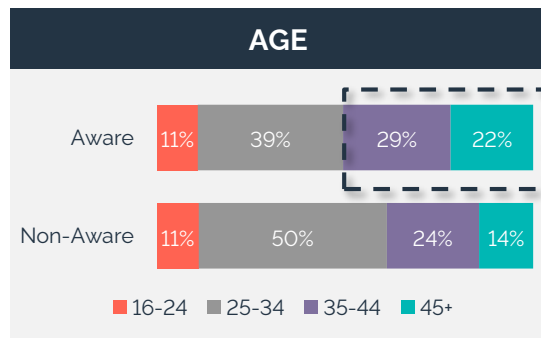
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Awareness of Sustainability Initiatives

Awareness of sustainability initiatives in general skews towards older, more educated, higher earning consumers, as well as those considering attending the FIFA WC in 2022. Consumers in the Abu Dhabi & Dubai areas are also much more likely to be exposed to initiatives. Those not aware of sustainability initiatives tend to belong to younger (esp 25-34) and lower income groups.



Demographic Profile



Source: YouGov Panel

Sample Size: Aware – 911
Non-Aware – 90

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Environmental Challenges

There are a number of environmental challenges on the road to attaining economical sustainability in the UAE.



WASTE GENERATION

Waste generation is a primary concern for the UAE as most of the country's waste ends up in landfills, ultimately putting pressure on environmental resources.



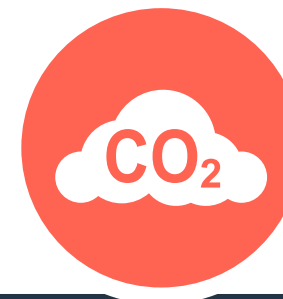
CARBON FOOTPRINTS

The UAE's carbon footprints are amongst the highest in the world and because of the hot climate, the country produces a great deal of excess energy.



LIMITED WATER

Natural water is limited in the UAE, forcing industries to seek alternatives which can have an adverse affect on the environment and increase carbon footprints.



AIR POLLUTION

The UAE's reliance on combustion fuels for energy, transport and industrial activities puts a tremendous strain on the environment and the natural ambient air quality.

Source: The UAE Government Portal. 2020

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GOVERNMENT LED INITIATIVES

– Water & Energy Saving

*Abu Dhabi & Al Ain***Rethink Your Lifestyle – Save Water and Energy**

- > The year long campaign targets Abu Dhabi and Al Ain residents, especially children, with the aim to develop a responsible attitude towards water
- > The campaign urges the public to make small, manageable contributions towards water and electricity conservation
- > The campaign is part of a long-term plan to reduce water and electricity consumption by at least 5% over the next few years.
- > Some simple tips provided were:
 - > Check leaky taps.
 - > Turn off taps while brushing.
 - > Sun dry clothes.
 - > Defrost and clean fridge every 6 months.
 - > Turn off TV power from main point.

Initiatives like 'Rethink Your Lifestyle' have been introduced by the government which aim to raise public awareness about saving water and energy in every aspect of consumers daily lives.



"If every individual saves for a year one per cent in his water and electricity consumption, an incredible Dh70 million will be saved a year."

Abdullah Al Ahbabi
Director of Business Support,
ADWEA



- > The daily average consumption of water in Abu Dhabi is 150 gallons per capita, while international averages range between 25 and 80 gallon.
- > The consumption rate of potable water is one of the highest in the world due to the warm climate and its use to irrigate greenery and agriculture

Source: gulfnews.com, 2020

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GOVERNMENT LED INITIATIVES

– Single-Use Plastic

Abu Dhabi

Another recently launched government initiative is Abu Dhabi's '*Single use plastic policy*' which aims to reduce the materials impact on the environment.

The policy has 4 main objectives:

Reducing the use of single-use plastic (and non-plastic) materials.

The policy will focus on the 16 items that constitute up to 70% of marine litter (according to international studies):

Reducing the amount of plastic material that enters the environment.

Single-use plastics generate a tremendous amount of waste and contributes little to the countries GDP.

Declaring Abu Dhabi Government free of single-use plastics by the end of 2021.

The focus will initially be on bags, plastic bottles and finally other items like cups, lids, cutlery, straws etc.

Changing public behavior towards more sustainable practices.

Moving away from a single use mentality by recycling, reusing completely embedded in the culture of the society

Source: Environmental Agency Abu Dhabi site 2020

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GOVERNMENT LED INITIATIVES

– Water Management

Dubai

Government led energy companies have implemented sustainability strategies to help ease the pressure on environmental resources and raise public awareness.

Dubai Electricity and Water Authority (DEWA)

– Integrated water resource management strategy

DEWA launched its integrated water resource management strategy in 2019, which focused on enhancing water resources, rationalising and reducing water consumption at source and through public awareness campaigns

- > Activities at DEWA offices are focused on customer and employee education through visual materials around the office on the benefits of water conservation.
- > DEWA also organised a range of activities at Global Village in Dubai aimed at raising 'Awareness' amongst visitors from different age groups including children.
- > This programme is an addition to the several other consumer facing programs conducted by DEWA over the decade and has led to saving of 2 terawatt-hours (TWh) of electricity and 7.4 billion gallons of water, equivalent to AED 1.2 billion.
- > These regular campaigns have contributed to the reduction of one million tons of carbon emissions, equivalent to planting 1.2 million trees and the consumption of 122 million LED lights, while water saving was equivalent to filling up 13,000 Olympic swimming pools.



- > The UAE Water Security Strategy 2036 aims to ensure sustainable access to water during both normal and emergency conditions.



Source: zawya.com. 2019

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SUSTAINABILITY IN THE COMMUNITY

– Waste Management

#ZerowasteUAE

Sustainability Tribe is an organisation based in the UAE that helps raise awareness of environmental sustainable initiatives among both individuals and businesses. Their #ZerowasteUAE initiative is aimed at reducing waste and creating a zero waste culture in the UAE.

- > Reduce, reuse, recycle, refuse and rot are the 5 principles that #zerowasteuae advocates.
- > The initiative provides home based solutions to inspire individuals to reduce as much waste as possible in their daily lifestyles.
- > Individuals can contribute to the initiative by joining their social media pages and posting pictures of their own actions using #zerowasteuae and #sustainabilitytribe thus helping spread awareness of easy impactful sustainability actions.
- > Businesses can partner with the initiative and become part of the online #zerowaste directory, which earns them a certification that helps interested customers find them as a sustainably run business.

Source: Sustainabilitytribe. 2020.

Environmental groups are working alongside commercial industries to further raise awareness about the challenges for sustainability in the region.



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SUSTAINABILITY IN INDUSTRY

– Waste Management

Sharjah

Bee'ah, Sharjah's municipal waste management company, has become a regional leader in environmental management in less than a decade by diversifying into several waste management streams.

Bee'ah, Sharjah's municipal waste management company

Established as a private public partnership (PPP) company

Company Activities

- 1) Waste collection
- 2) Waste sorting and treatment
- 3) Residuals management
- 4) Waste to energy
- 5) Air quality monitoring
- 6) Water pollution studies
- 7) Environmental consulting

Public Incentives Programme

- > The programme incentivises people to recycle with the aim of nurturing a culture of sustainability.
- > Reverse vending machines (RVMs) are used where public can put in plastic bottles and aluminium cans.
- > A receipt is provided and they stand a chance to win prizes through monthly lucky draws .

Future Plans

- > Bee'ah in partnership with Masdar is creating a waste to energy plant, a first of its kind in the Middle East which will convert 300,000 tons of non-recyclable waste to 30MW electricity annually, enough to power 28,000 homes.
- > Bee'ah will convert 47 hectares of landfill area in Sharjah into a solar energy facility in 2021 producing 42 MW of electricity annually.
- > Create separate processing plants for wood waste, industrial liquid and oil waste, cooking oil and paper and cardboard recycling.
- > Regional partnerships to create an e-waste recycling entity that will cater to demand from the UAE as well as middle east region.

Source: Bee'ah website, 2020

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SUSTAINABILITY IN INDUSTRY

– Single-Use Plastics Ban

Dubai Airport

Dubai Airports single use plastics ban

- > All single use plastic items like plastic cutlery, water bottles, drinking straws, takeaway food packaging and polythene bags have been banned from cafés, restaurants and shops at Dubai airports
- > 95% of its commercial partners signed the pledge to stop using disposable plastic in their outlets from January 2020.
 - For e.g. **McDonald's** replaced more than 5 million items with recyclable materials
 - **Costa Coffee** launched fully-sustainable plant-based "smart" coffee cup to serve the annual 2.6 million cups of coffee it does in Dubai's airports
- > There are plans of creating additional recycling facilities to customer-facing areas to drive public engagement with the initiative.

Source: airport-technology.com, 2019

Initiatives have been adopted at travel hubs such as at **Dubai Airport**, which banned single-use plastics across all of its terminals from the 1st of January 2020.

Costa Coffee at Dubai Airport



- > The biggest challenge is sourcing alternatives for plastic bottles, one of the most frequently used and discarded pieces of single-use plastics by the 90 million passengers who pass through Dubai's 2 airports annually.

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SUSTAINABILITY IN INDUSTRY

– Single-Use Plastics Ban

Emirates Airlines

Emirates plastic free flights

- > Paper straws replaced plastic straws on board to make all flights plastic straw free. Plastic stirrers and swizzles were replaced by eco friendly options.
- > Plastic bags used for inflight retail purchases were replaced by paper bags. This has reduced 8.7 million single use items from landfill each year.
- > The in-flight crew also separates large plastic bottles on board to be recycled. This has diverted 3 tons of plastic bottles from landfill every month.
- > The blankets used in the flights now are made using *ecoTHREAD*, created from recycled plastic bottles. Each blanket uses 28 recycled bottles and thus saves 88 million plastic bottles from landfill from this initiative alone.

In 2019, **Emirates**, one of the biggest airlines in the world announced its efforts to eliminate single use plastics on board all their flights.

- > The on-board initiatives are in addition to other environmental sustainability initiatives that Emirates undertakes like efficient aircrafts, optimal routes to save fuel, waterless washing of aircrafts and solar powered maintenance centers

Emirates Airlines



Source: emirates.com, 2019

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SUSTAINABILITY IN INDUSTRY

– Save Water

Colgate

Colgate 'Save Water' campaign

Featuring Olympic champion swimmer, Michael Phelps, Colgate launched their 'save water' campaign in the GCC. Using television, social media and digital platforms, its aim is to help people understand the importance of saving water.

- > A seemingly simple change of 'switching off taps while brushing' could lead to huge water savings
- > According to Colgate, the average person can save up to 15 liters of water each time they brush their teeth if they just simply turn off the tap between rinsing. And assuming this is a twice a day activity, that means each person can save up to 30 Liters of water per day
- > The overall impact is not only water resources being saved but also an annual saving of close to AED 800 per family of four just by switching off taps while brushing
- > Colgate also asked all social media users to use #TurnOfftheTap on Instagram and Facebook using the hashtag as a way to signify their pledge to conserve water when they brush their teeth.

Source: www.middleeastevents.com, 2018

Other consumer industries also seek to change the public's perceptions about sustainability in everyday life. **Colgate** launched their 'save water' campaign in the GCC.



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Word Association

Unaided, consumers in the UAE associate the word 'Sustainability' with phrases like 'long term', 'eco friendly' and 'continuous/stability'.

SPONTANEOUS ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' – GENERAL POPULATION

Q: When you think of the word 'sustainable', what are the words/terms that come to your mind? Please mention as many responses as you can think.



Source: YouGov Panel

Sample Size – 1,001

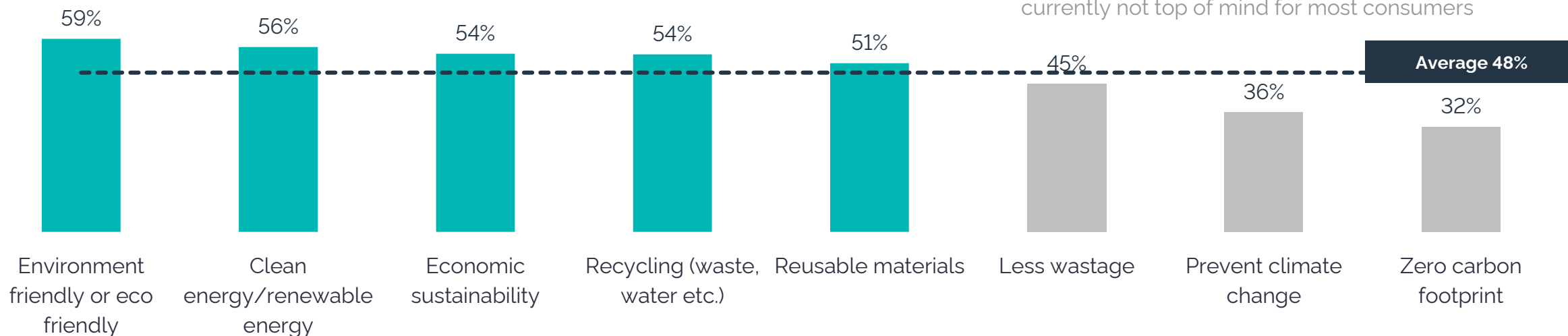
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Prompted Association

Once prompted, consumers associate 'Sustainability' with being 'eco friendly', and specific aspects like 'clean energy', 'recycling' and 'reusable materials' are also closely linked.

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' – UAE 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.



Source: YouGov Panel

Sample Size – 1,001

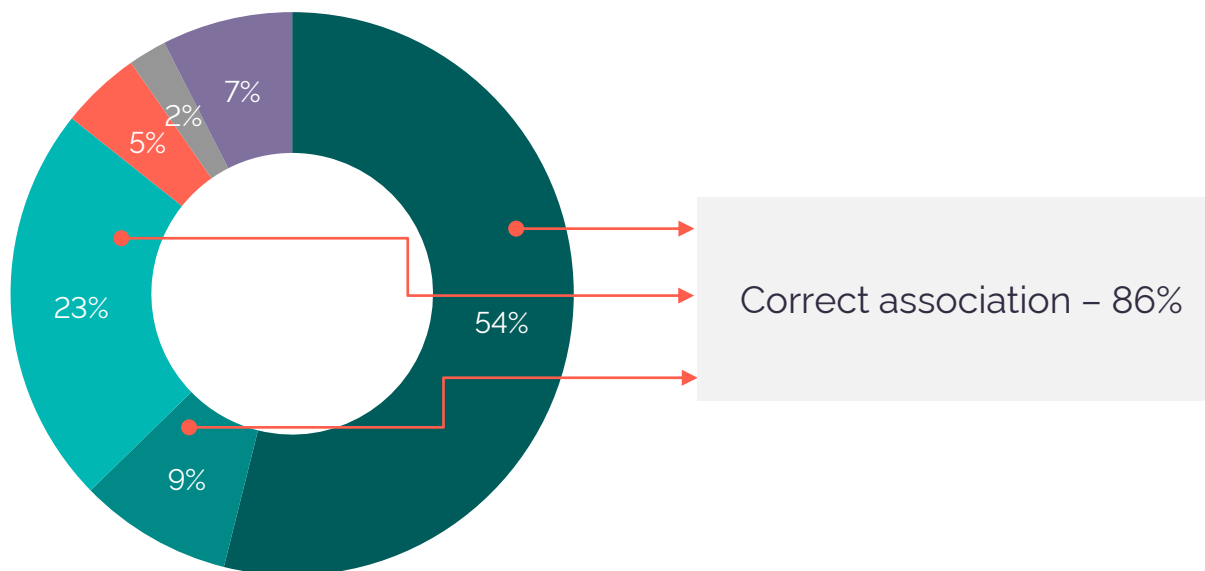
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Single Use Plastics

'Single Use Plastics' remain one of the most pervasive threats to economic sustainability in the UAE, with close to 9 in 10 people aware of their limited nature.

CORRECT ASSOCIATION WITH THE TERM 'SINGLE USE PLASTICS' – GENERAL POPULATION

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



- Plastic items discarded after using once
- Both 1 and 2
- Plastics that you use many times

- Multi-use plastic items discarded after using once
- Thin or weak looking plastic items
- Don't know

Source: YouGov Panel

Sample Size – 1,001

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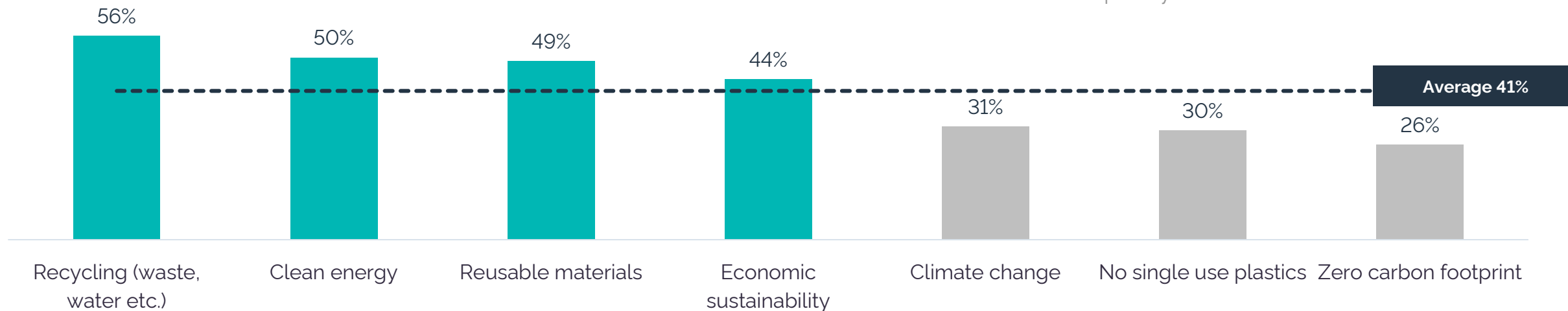
Most Important Initiatives

Recycling, clean energy and reusable materials are the most important sustainability initiatives among consumers in their daily lives.

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – GENERAL POPULATION

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

The impact of **climate change, single-use plastics** and **Carbon footprints** are much lower priority in consumers consideration



Source: YouGov Panel

Sample Size – 1,001

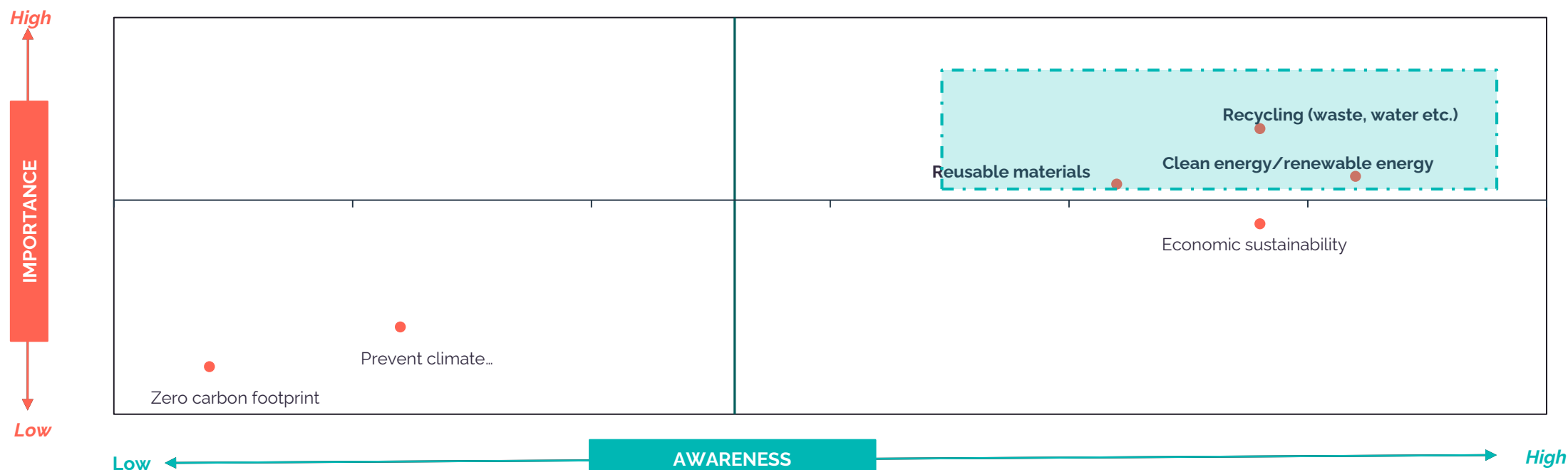
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Consumer Awareness

Sustainability initiatives that consumers are most aware of are the most widely adopted, while issues that are more global aims and are perhaps less understood/less personally relevant, become a much lower priority.

AWARENESS VS IMPORTANCE OF SUSTAINABILITY IN EVERYDAY LIFE

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



Source: YouGov Panel

Sample Size – 1,001

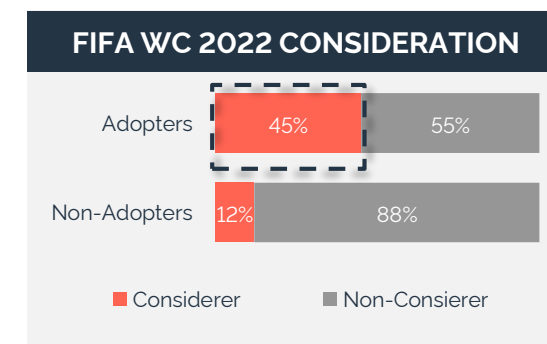
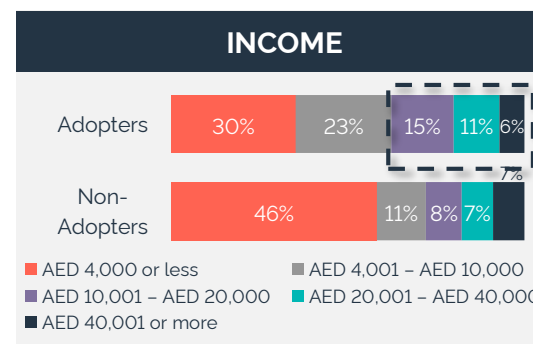
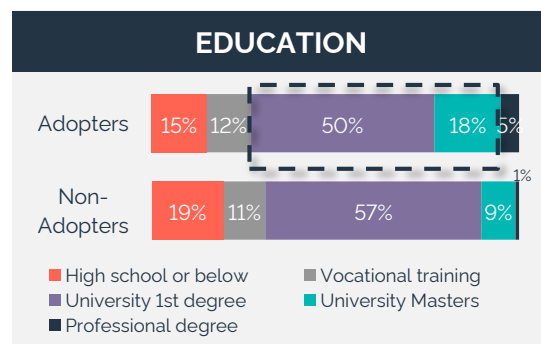
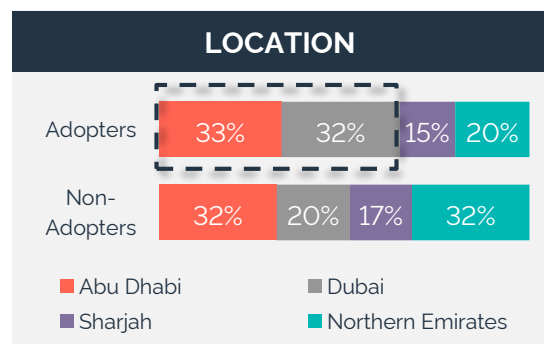
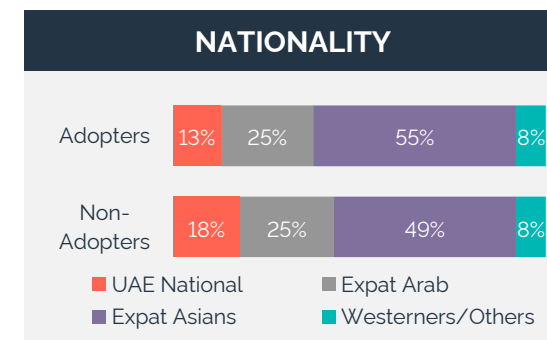
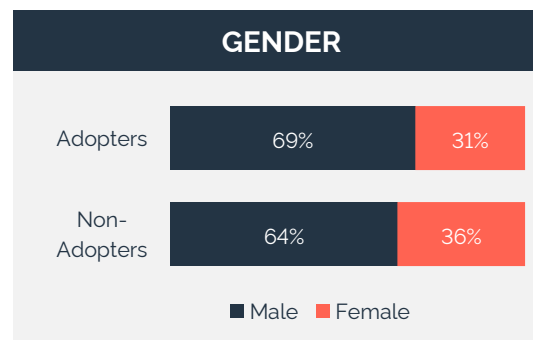
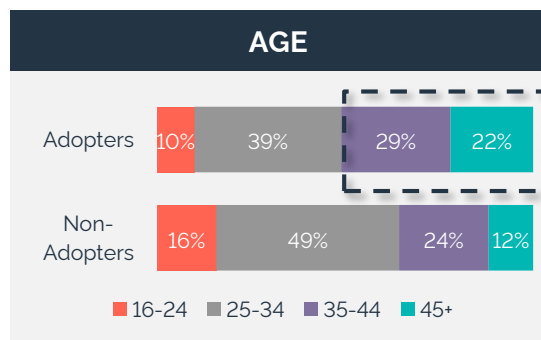
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Adopters of Sustainability Initiatives

Consumers who adopt sustainable initiatives in their daily lives tend to be older, more educated and have higher incomes, while Non-Adopters are more likely to be younger (<35), and have lower income. Those considering attending the FIFA World Cup in 2022 are also much more likely to be adopters of sustainability initiatives.



Demographic Profile



Source: YouGov Panel

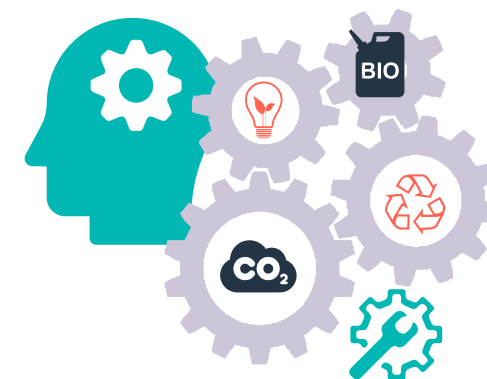
Sample Size: Adopter – 925
Non-Adopter – 76

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Sustainability in sports, events and tourism

3

Section Summary



The average sports fan that considers attending major events tends to be younger males which potentially makes them less likely to be adopters of sustainability initiatives.

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.

Separate recycling bins along with designated outdoor smoking areas and digital tickets are the most prevalent sustainability initiatives at events in the UAE.

Events should advertise sustainability initiatives across multiple channels as well as promote them throughout the entirety of the consumers journey while at events.

Sustainability is not the highest on the list of factors that influence decision to attend events – Factors like price, timings, travel, host reputation precede sustainability

Initiatives like digital ticketing and recycling are more easily implemented, while some environmentally damaging behaviors are habitual among consumers and will take time and awareness to shift

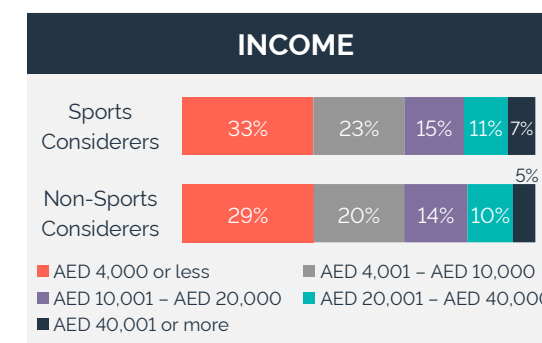
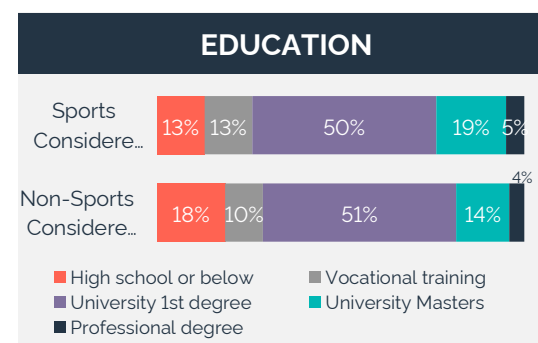
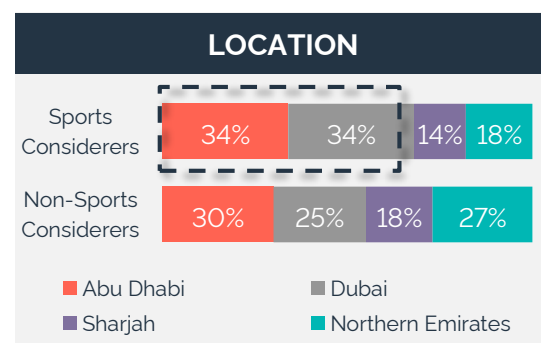
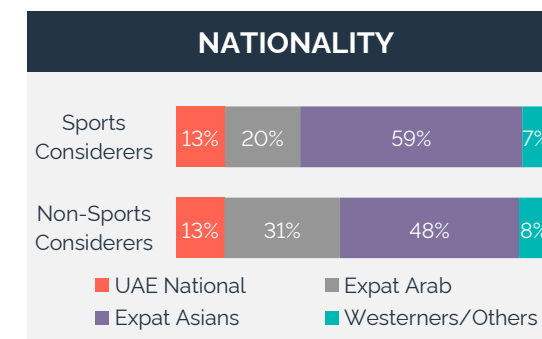
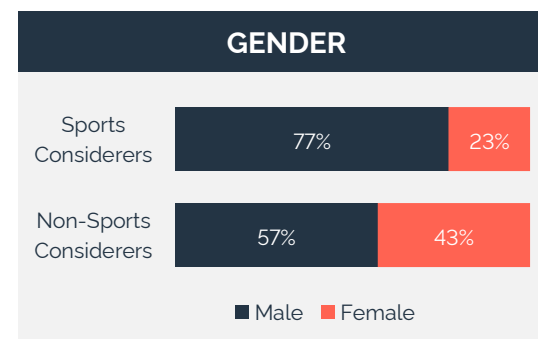
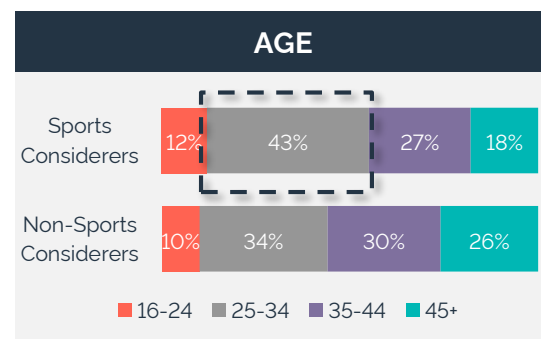
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Sports Considerers

The average person that would consider attending a major sports event tends to be younger and resides around the Dubai area, while older (45+) consumers and those in the Northern Emirates are less likely to consider attending large events.



Demographic Profile



Source: YouGov Panel

Sample Size: Considerer- 614
Non-Considerer- 387

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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: Event Sustainability case study by James Stibbs

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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 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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VENUE CASE STUDIES

– Sustainability in Sport & Leisure

**Coca-Cola Arena**

The Middle East's largest fully air conditioned indoor arena has been designed with sustainable features as central to the build and incorporated them before opening it's gates in 2019 Plastic bags used for inflight retail purchases were replaced by paper bags. This has reduced 8.7 million single use items from landfill each year. Sustainability initiatives include:

- > Digital tickets instead of paper options
- > Organic composter in the complex would help in effective waste management
- > Venue is easily accessible by public transport
- > Water and Electricity saving features
- > Humidity capture ACs would be more efficient than traditional units

Source: en.coca-colaarabia.com, 2019. medium.com 2018

As a result of the increased need for sustainability within the Sports and Tourism industry in the UAE, major venues are purpose built to accommodate modern economical solutions.

**Dubai Frame**

The newest entrant in Dubai's tourist sites has incorporated solar energy into it's 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
- > It's design provides Dubai Frame with a golden hue along with harnessing solar power
- > The total power generated enables the building sustain most of it's own power
- > Preventing the greenhouse effect with UV & IR filters
- > The photovoltaic glass façade has led to the facility reducing 37% of its air conditioning (HVAC)

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CASE STUDY · DP WORLD CHAMPIONSHIPS

– Sustainability in Sport

Recycling initiatives at the DP World Championships, Dubai

DP World Championships, Dubai's premier European Tour Golf tournament has been highlighting its importance through it's various recycling partners targets:

- > **Voss bottles**, the official beverage partner of the tournament, partnered with cycled technologies to install smart bins around the course to encourage waste sorting through three types of bins
 - General waste, recyclable waste and Voss bottles. Events technologies have a platform to connect supplier and buyer to ensure a seamless, traceable transition of recyclable plastic
- > **European Tour** also partnered with **Averda**, a waste management company that placed Reverse Vending Machines (RVMs) around the venue to drop used plastic bottles and get branded souvenir golf balls as gifts

Recycling is the highest priority sustainability initiative in consumers everyday life and sports events in the UAE readily implement this feature as well.



averda

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.



Source: cycled.no, 2018. Averda twitter account, 2018. European tour, 2014

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CASE STUDY · DUBAI TENNIS CHAMPIONSHIPS

– Sustainability in Sport

Sustainability at 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.

- 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 seating in the stands
- 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.”

Sports Ministry



Source: YouGov Sport interview with a tourism general manager in Oman

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CASE STUDIES · **SWIMMING CHAMPIONSHIPS**

– Sustainability in Sport

**Sustainability at the 2010 WSC and 2012 ASC**

- > Solar powered lights in the complex + parking area
- > Food & beverage served in recyclable plates, cups etc. Minimal single use plastic use
- > Recycling, waste sorting bins are placed throughout the complex.
- > Motion sensor lights and taps
- > AC and pool water used for landscape irrigation in the complex

The 2010 **FINA World Swimming Championships** and the 2012 **Asian Swimming Championships** held at the Hamdan Sports Complex in Dubai saw a host of infrastructural as well as consumer facing sustainability initiatives.

"There has to be education for this matter. There should be events, seminars, lectures or even competitions to encourage people and educate them about sustainability."

Large Event Organiser



"It must be a complete explanation, conferences and seminars.... We need to encourage the new generation we communicate to, what is the relationship of sustainability with us."

Major Events

Source: YouGov Sport interview with a tourism general manager in Oman

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CASE STUDY · **TERRA & EXPO 2020**

– Sustainability in Events

Terra, the sustainability pavilion at Expo 2020 Dubai

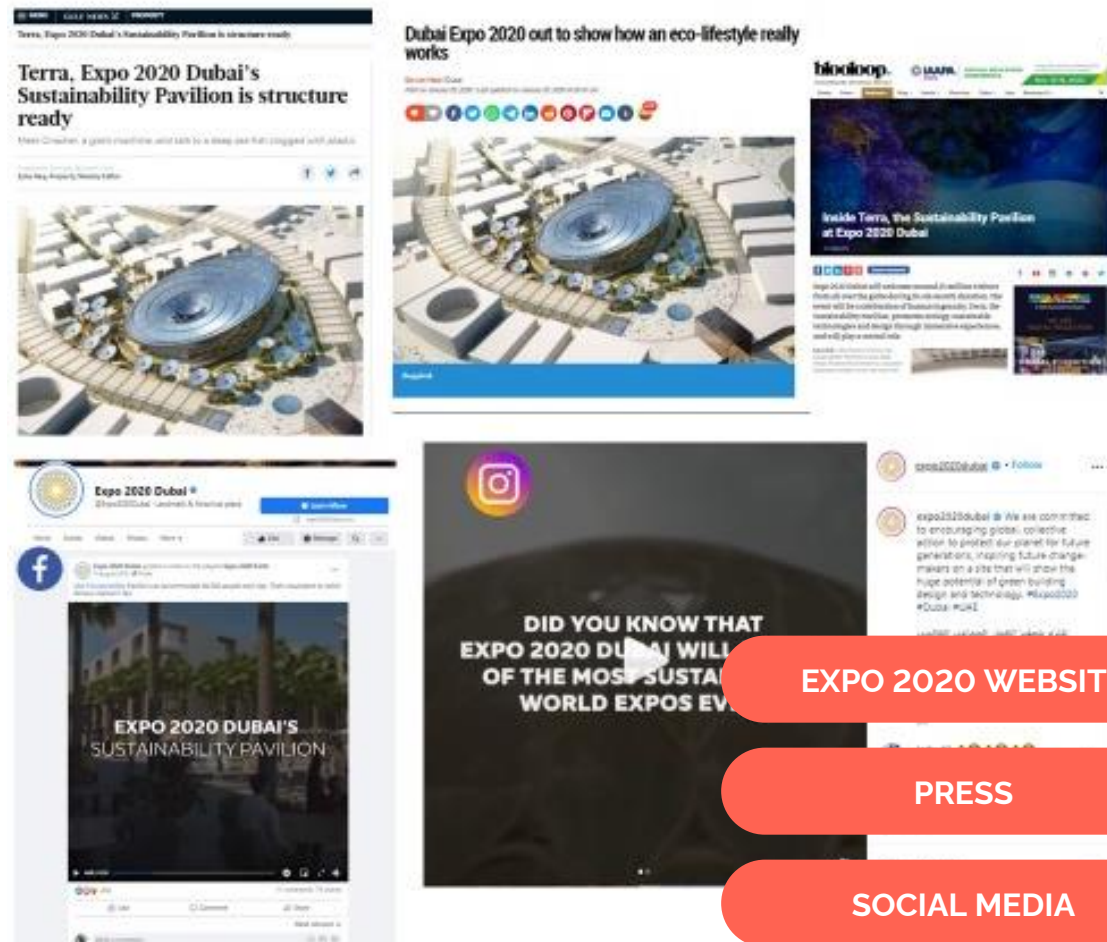
Terra will be designed to deliver the message of sustainability to visitors through displays of solar energy, water usage, reduce carbon footprint and new innovative solutions for a sustainable future.

- The PR team at Expo 2020 have created an integrated communication plan to drive PR regarding their sustainability pavilion and strategy using various media sources, with a particular focus on social media through #sustainability

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

Large Events Venue

However, in order to raise awareness of sustainability initiatives, the key is to deliver clear messaging with a PR driven communications plan across multiple channels.



Source: Desk Research & YouGov Sport interview with am events producer working in the UAE

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Example: Consumer Journey

The goal for sustainability at events and sports venues is to implement initiatives at every stage of the consumers journey, thereby maximizing 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

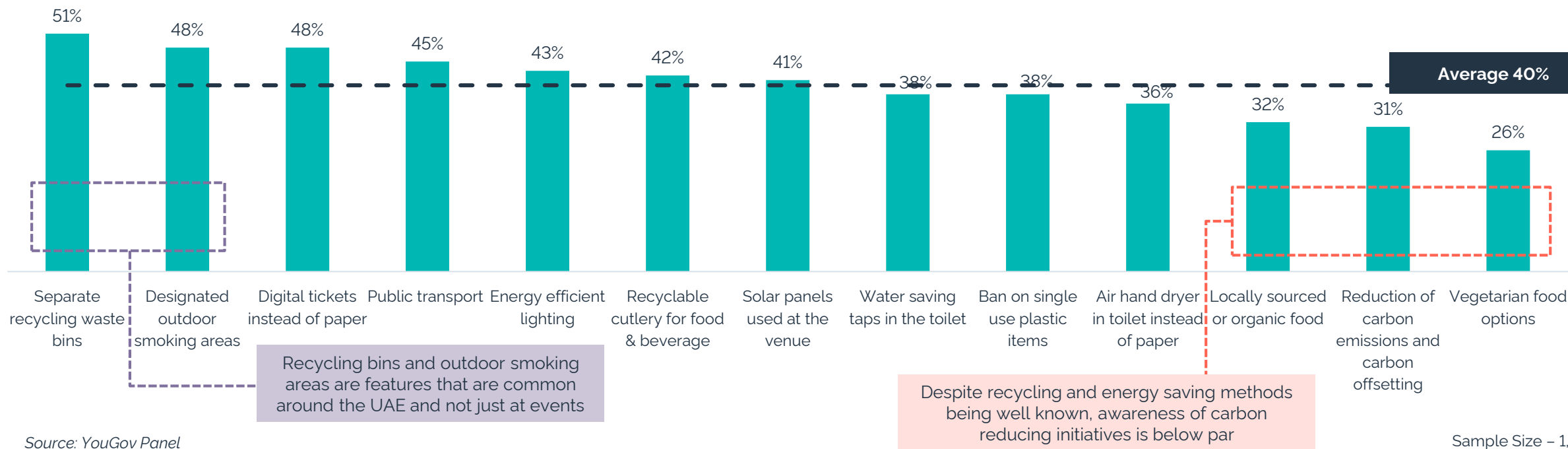
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Awareness of Sustainability

Current awareness of sustainability initiatives at events is good in the UAE with recycling bins, designated outdoor smoking areas and digital tickets being the most salient among consumers.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – 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? .



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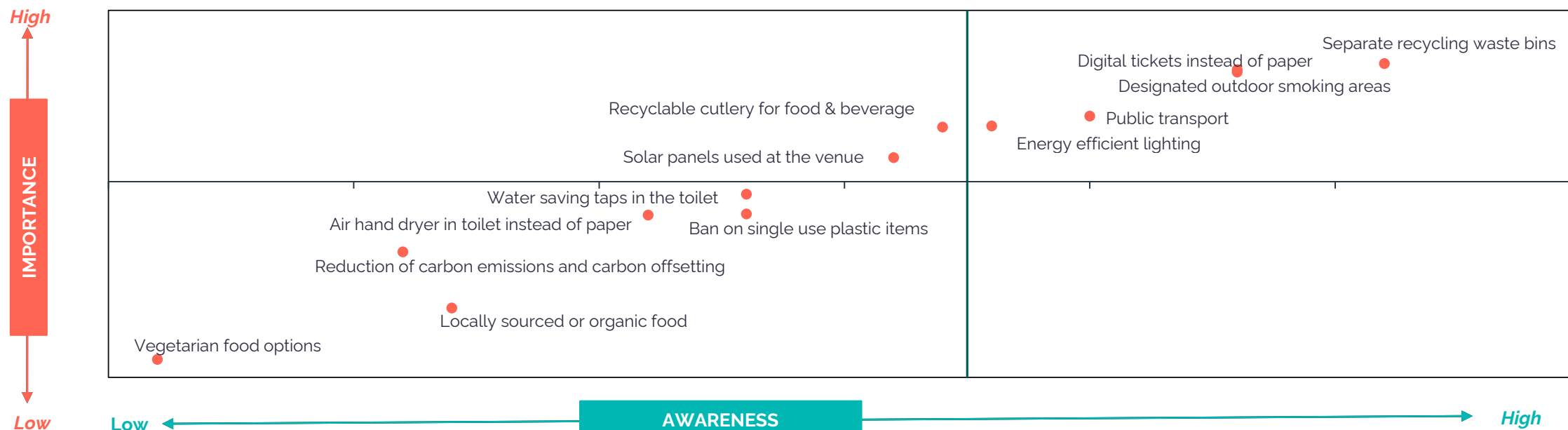
Sustainability Initiatives at Events

'Digital tickets', 'designated outdoor smoking zones', 'public transport', 'energy efficient lighting' and 'waste sorting bins' are sustainability initiatives that people are aware of as well as expect at events.

SUSTAINABILITY INITIATIVES 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 – 1,001

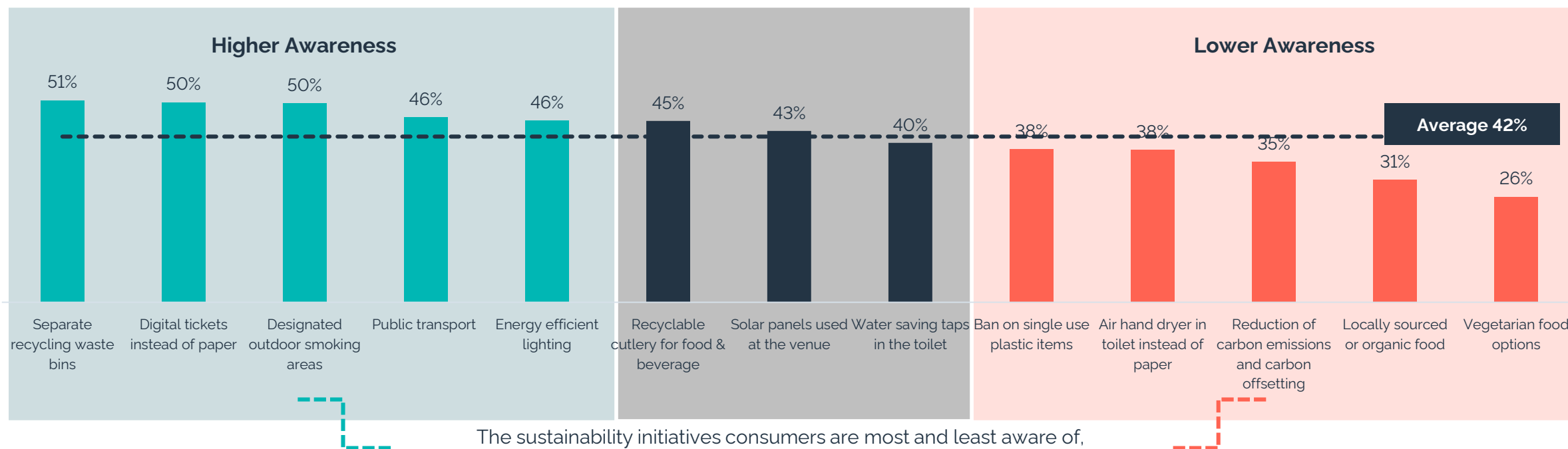
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Sustainability Initiatives Expected at Events

Recycling, ticketing and smoking spaces are the most impactful sustainability initiatives as they are already well established in the UAE, while less understood initiatives have little impact.

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – GENERAL POPULATION

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



Source: YouGov Panel

Sample Size – 1,001

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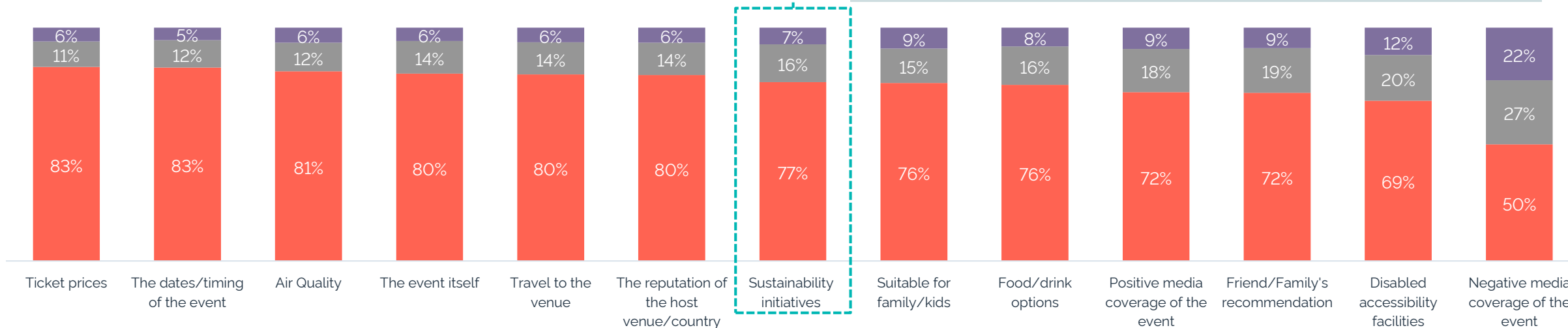
Factors Important While Deciding to Attend Events

Despite being aware of initiatives like recycling and paperless ticketing, sustainability initiatives in general is still not a major consideration when deciding to attend an event.

FACTORS IMPORTANT WHILE DECIDING TO ATTEND EVENTS – GENERAL POPULATION

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

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



Event considerers vs Gen Pop show similar results

■ Important ■ Neutral ■ Not Important

Source: YouGov Panel

Sample Size – 1,001

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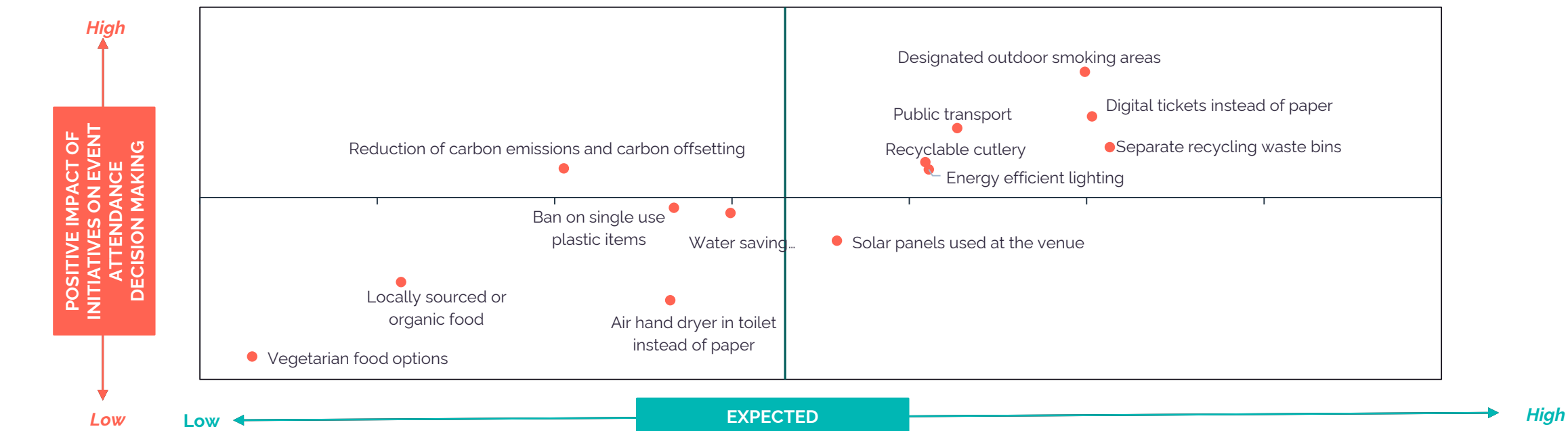
Impact Decision Making

'Digital tickets', 'designated outdoor smoking zones', 'public transport', 'recyclable cutlery', 'energy efficient lighting' and 'waste sorting bins' are sustainability initiatives that people find important and they would also have a positive impact on their decision to attend an event

SUSTAINABILITY INITIATIVES AT EVENTS – AWARENESS VS EXPECTATIONS

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

Q: When you consider attending large events at a stadium/arena, which of these sustainability initiatives would impact your decision to attend?



Source: YouGov Panel

Sample Size – 1,001

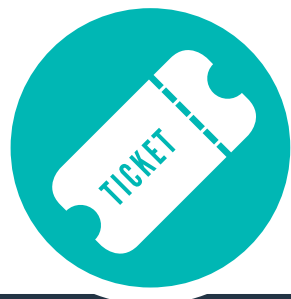
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Easily Implemented Sustainability Initiatives

Digital ticketing, digital payments and recycling bins are commonly used in the UAE and this prevalence makes them the easiest sustainability initiative venues can implement.

"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



DIGITAL TICKETS & PAYMENTS

Not only saves paper but also convenient as it avoids standing in queues to buy tickets.



DIGITAL TICKET SCANNER

No effort on the part of attendees, easy for organiser to track entry.



USAGE OF RECYCLING BINS

Commonly seen around the UAE, it would be easy for attendees to throw waste into appropriate bins.

Source: YouGov Sport Interviews with Sports/Events/Tourism Executives in the UAE

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Not Easily Implemented Sustainability Initiatives

... However, awareness is a driving factor for change and long formed habits like use of private cars, single use plastics and generally low awareness are hence longer term issues.

"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



USING METRO/BUSES FOR VENUES

This is a change that requires change from deep seated commuting habits for attendees with cars being an established way to travel historically in the UAE



ELIMINATION OF SINGLE USE PLASTICS

Due to single use plastics being cheap and abundant, efforts from both organisers and attendees to refuse usage of these would be required to completely eliminate their usage at events



IMPROVE AWARENESS AND ADOPTION OF SUSTAINABILITY INITIATIVES

Although awareness and adoption among consumers in the UAE is on the rise, the cheap and easy availability of pollutants like single use plastics makes it a

Source: YouGov Sport Interviews with Sports/Events/Tourism Executives in the UAE

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Sustainability and the FIFA World Cup 2022



4

Section Summary



Those wanting to attend the 2022 World Cup are more likely to have higher education and income and live in the Dubai area, while non-considerers, tend to have lower income and education and live elsewhere.

Environmental sustainability initiatives are the third most well known aspect of the FIFA World Cup 2022 that people are aware of – more so among considering attending the World Cup other sports events in Qatar.

Digital ticketing is the most expected sustainability initiative among those who consider attending FIFA World Cup 2022, slightly ahead of waste sorting bins and designated outdoor smoking areas.

PR around sustainability initiatives for FIFA World Cup 2022 would positively impact perception of Qatar - significantly more so those who consider attending FIFA World Cup 2022 and other sports events in Qatar.

Digital tickets, energy efficient lighting and single use plastic ban are the factors that will have the most positive impact on people's consideration of FIFA World Cup 2022.

Communication of 'vegetarian food options' and 'designated outdoor smoking areas' could be avoided as they would have a negative impact on people's consideration of FIFA World Cup 2022.

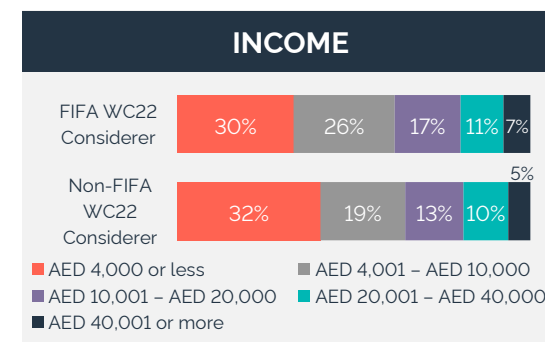
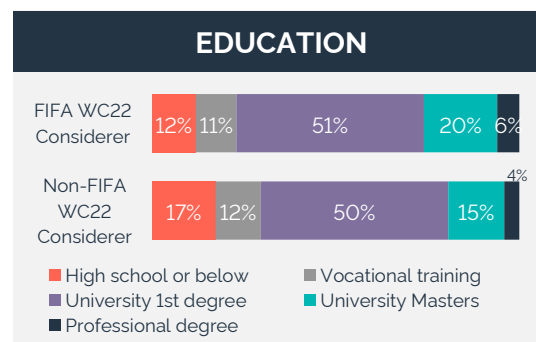
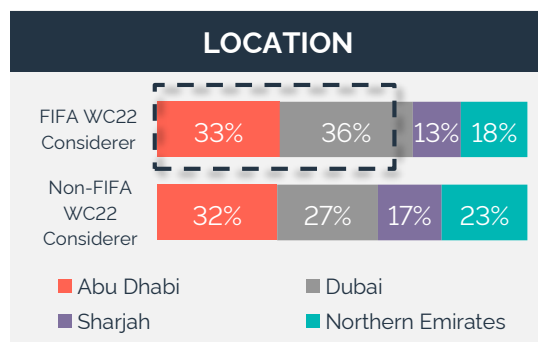
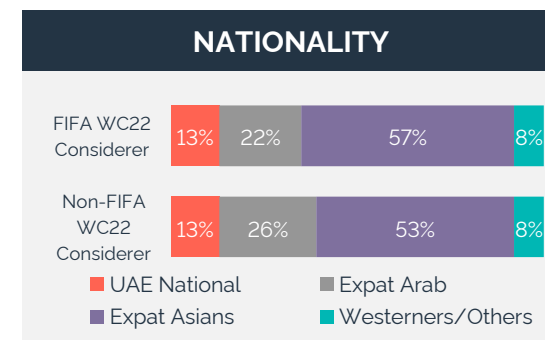
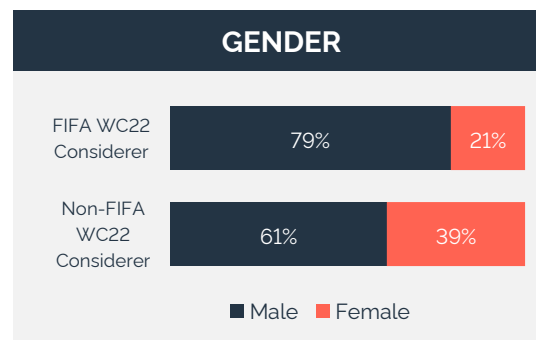
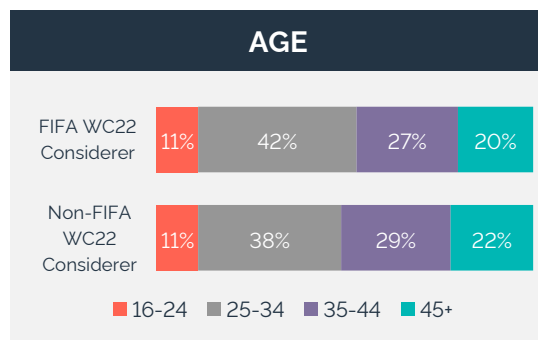
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FIFA World Cup 2022 Considerers

Consumers who are considering attending the FIFA World Cup in 2022 are more likely to be higher earners and situated in the Dubai area, while those who are not considering attending, tend to have lower income and education and are more likely to be from Sharjah and the Northern Emirates.



Demographic Profile



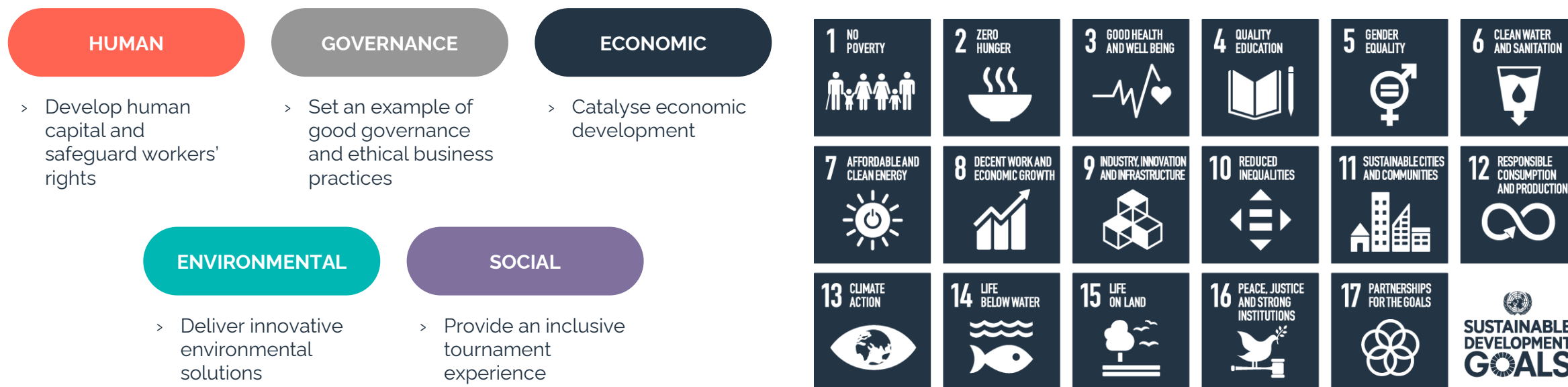
Source: YouGov Panel

Sample Size: FIFA Considerer – 428
Non-FIFA Considerer- 573

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FIFA World Cup 2022 Sustainability Strategy

The FIFA World Cup 2022 sustainability strategy was 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.



Source: FIFA World Cup 2022 Sustainability

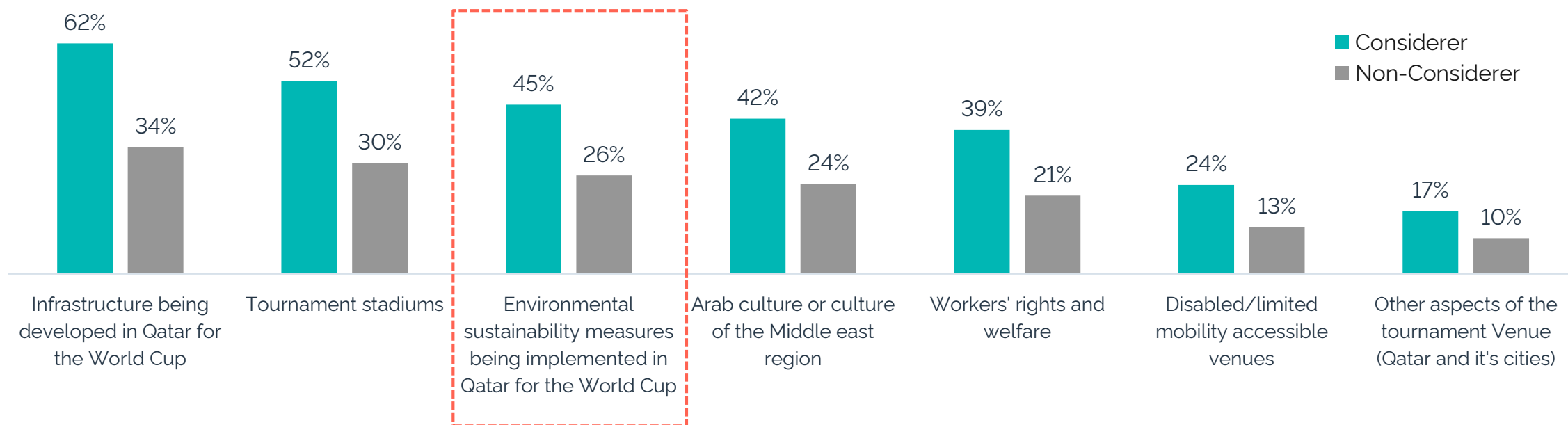
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Awareness of Aspects About FIFA World Cup 2022

Currently, awareness of environmental sustainability at the 2022 World Cup is solid among consumers; behind only infrastructure and stadiums.

AWARENESS OF ASPECTS ABOUT FIFA WORLD CUP 2022 (AMONG CONSIDERERS)

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: FIFA Considerer – 428
Non-FIFA Considerer- 573

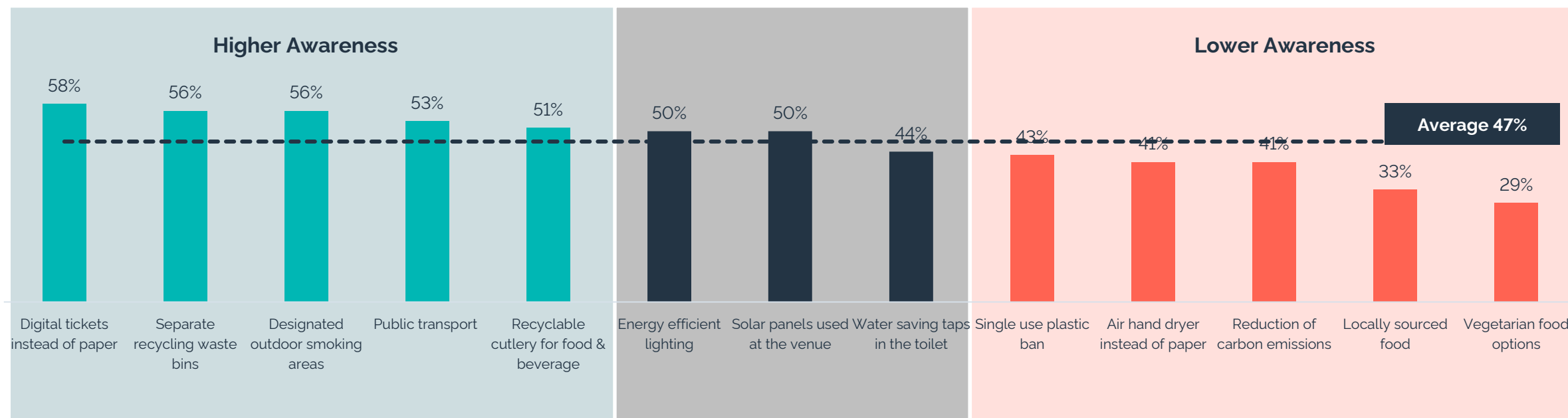
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Sustainability Initiatives Expected at FIFA World Cup 2022

Digital ticketing is the most expected sustainability initiatives among those considering to attend the FIFA World Cup, slightly ahead of waste sorting bins and designated outdoor smoking areas.

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?



Expected sustainability initiatives are in line with general awareness suggesting that more work is needed to bolster perceptions of initiatives with lower awareness

Source: YouGov Panel

Sample Size: FIFA Considerer – 428

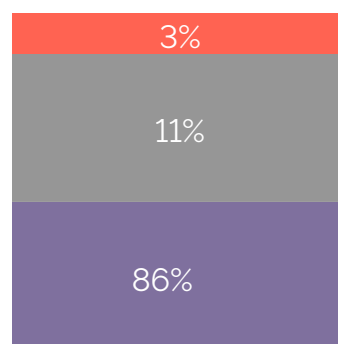
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Impact of PR Around Sustainability on Event Perception

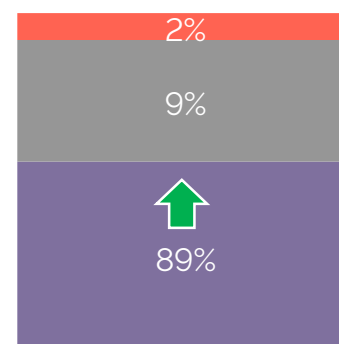
Focused PR campaigns around sustainability initiatives would positively impact event perception for the majority of the population, around 9 in 10 people.

Q: If you knew that a large event was implementing several sustainability initiatives for its venues like public transport, recyclable materials, ban on single use plastics etc., how would this change your impression of that event?

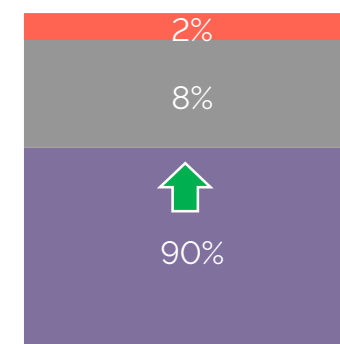
- Impression would become negative
- No change in impression
- Impression would become positive



General Population



FIFA World Cup 2022 considerer



Other Qatar events considerer

This impact is significantly higher among those who consider attending FIFA World Cup 2022 and other sports events in Qatar

Source: YouGov Panel



Significant at 95% confidence interval vs. Gen Pop

Sample Size: General population – 1,001
FIFA World Cup Considerer – 428
Other Qatar events – 416

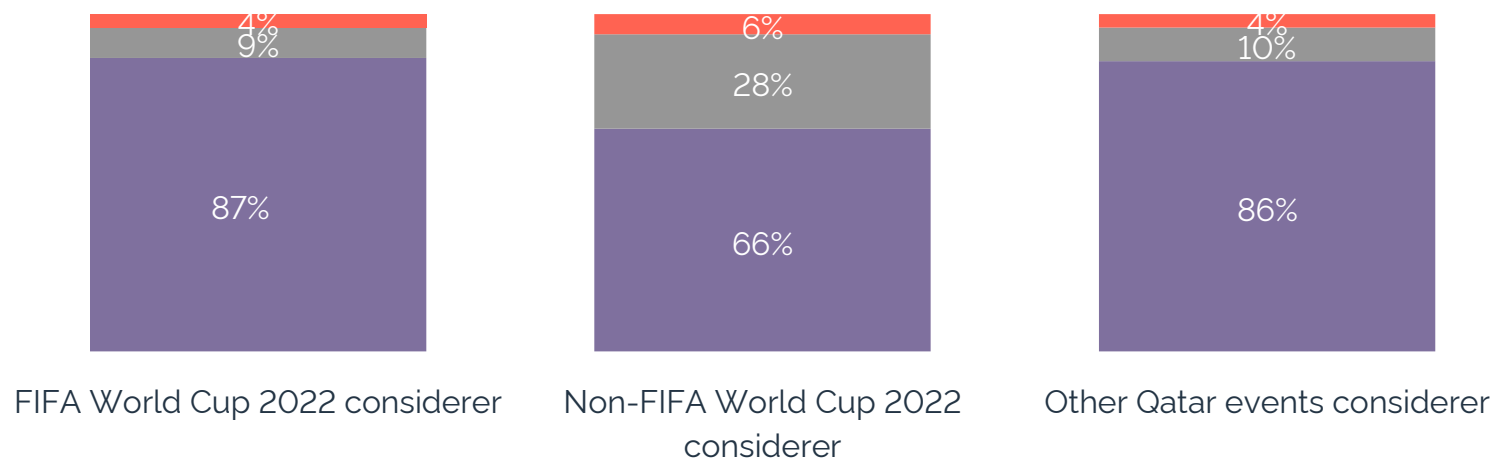
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Change in Perception Due to PR on Sustainability Initiatives

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.

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?

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



Source: YouGov Panel

Sample Size: FIFA Considerer – 428
Non-FIFA Considerer – 573
Other Qatar events – 416

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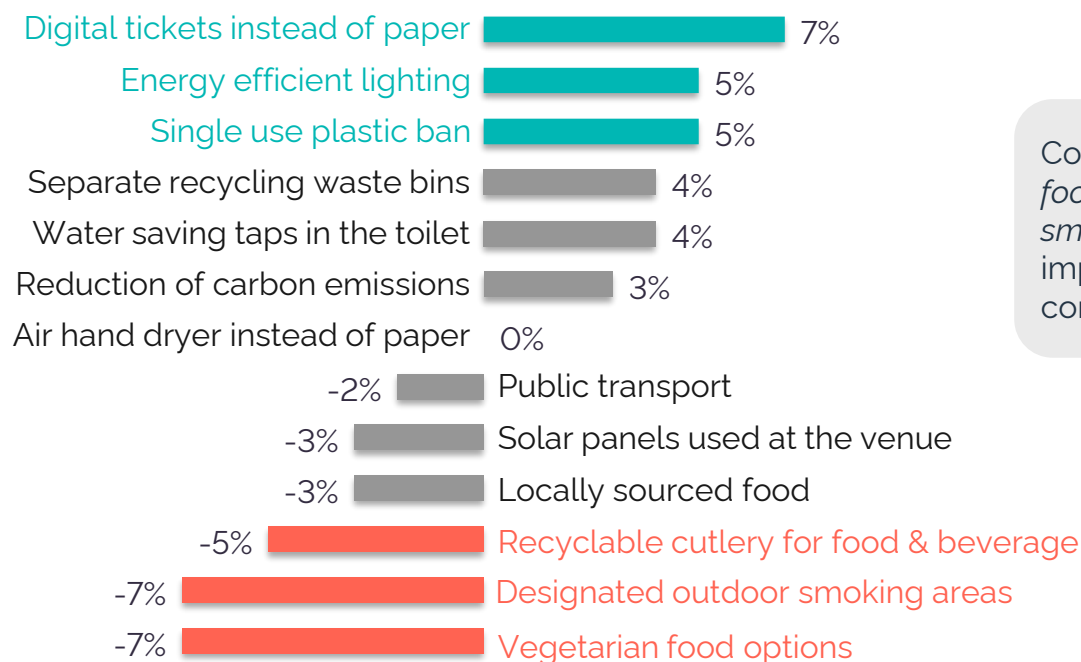
Impact of PR of Each Sustainability Initiative on Consideration of FIFA World Cup 2022

Digital tickets, energy efficient lighting and single use plastic ban are the types of messaging that will have the most positive impact on people's consideration of FIFA World Cup 2022.

"The paper badge they use to enter the event... is easy to be done because everyone has a smartphone and internet connection.

I think the single use plastic in event must be eliminated...it might be a little difficult, unless there were an alternative for it."

Large Events Organiser



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

■ Positive Impact
■ Neutral Impact
■ Negative Impact

Source: Advanced Logistic Regression Modelling

Sample Size: General population – 1,001

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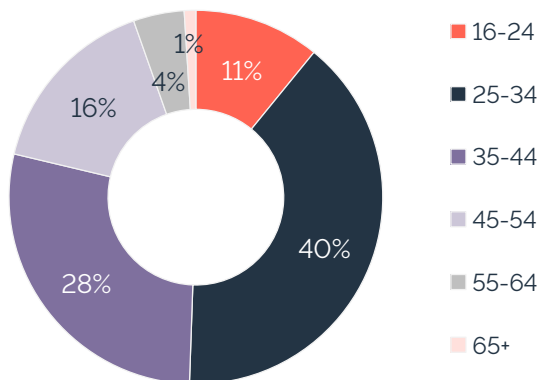
APPENDIX



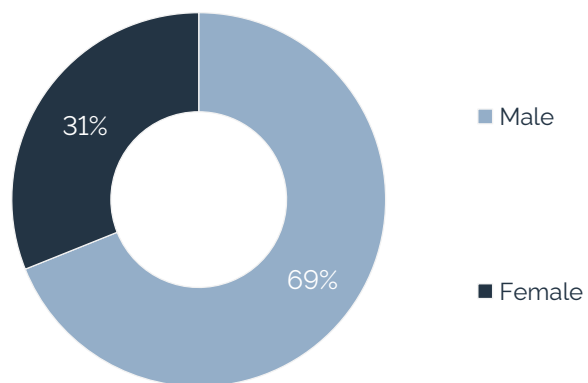
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DEMOGRAPHIC PROFILE OF NAT REP SAMPLE IN THE UAE

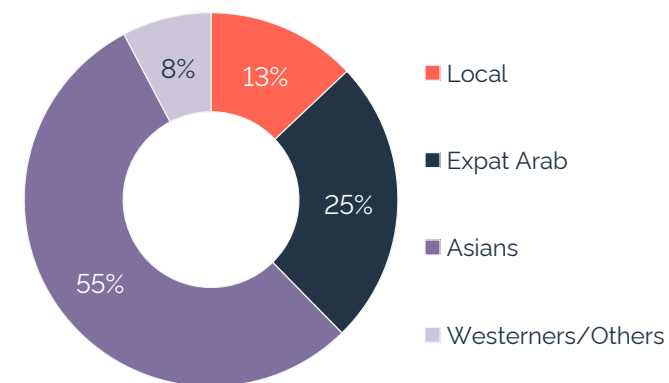
AGE



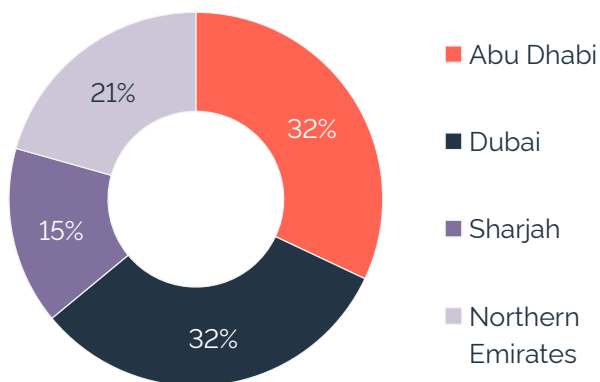
GENDER



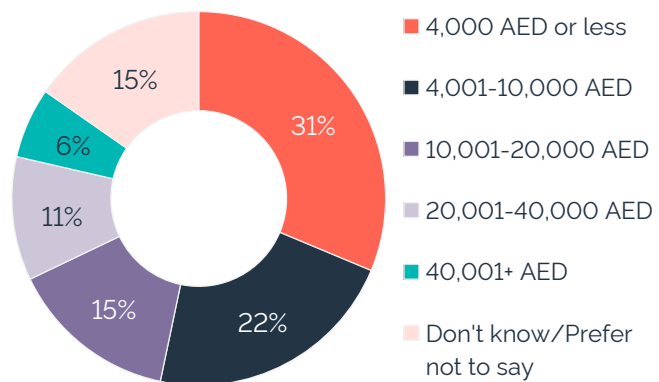
NATIONALITY



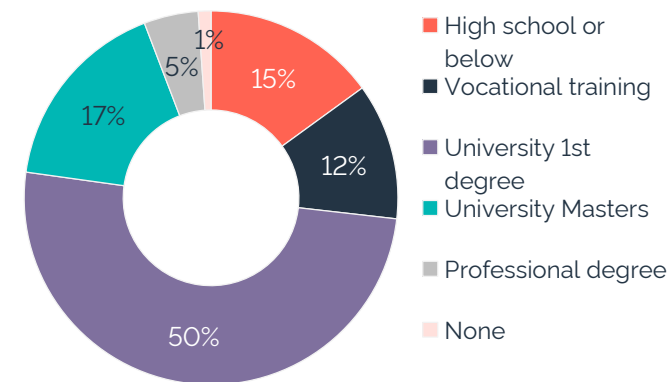
LOCATION



INCOME



EDUCATION

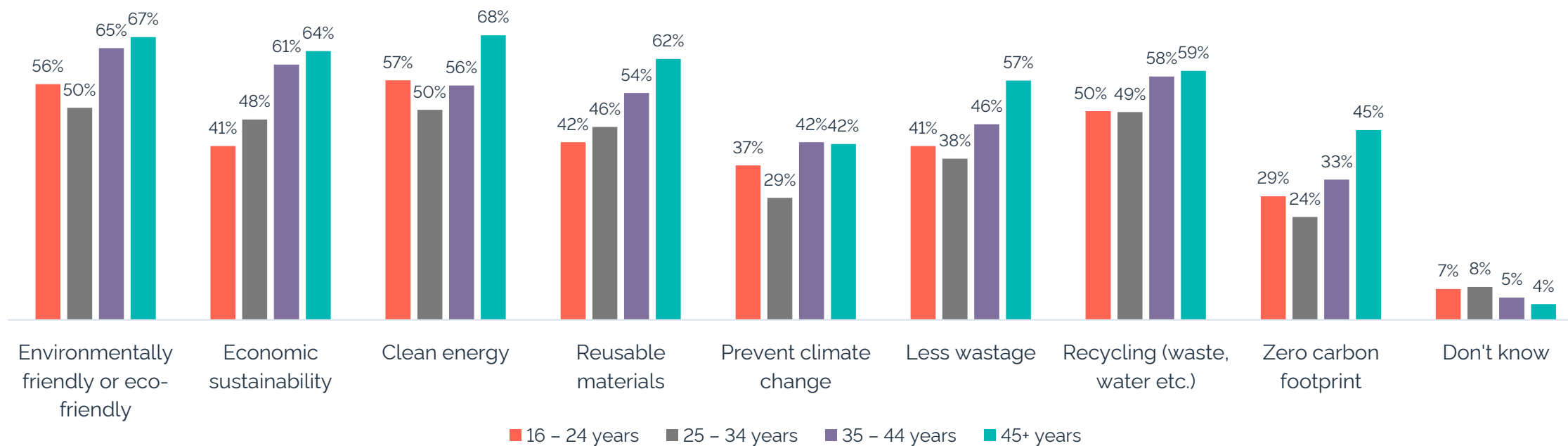


Sample Size - 1001,

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Sustainability awareness is driven by 35+ year age group across all associations

PROMPTED ASSOCIATIONS WITH THE TERM 'SUSTAINABILITY' IN UAE – BY AGE GROUPS



Source: YOUNGOV PANEL

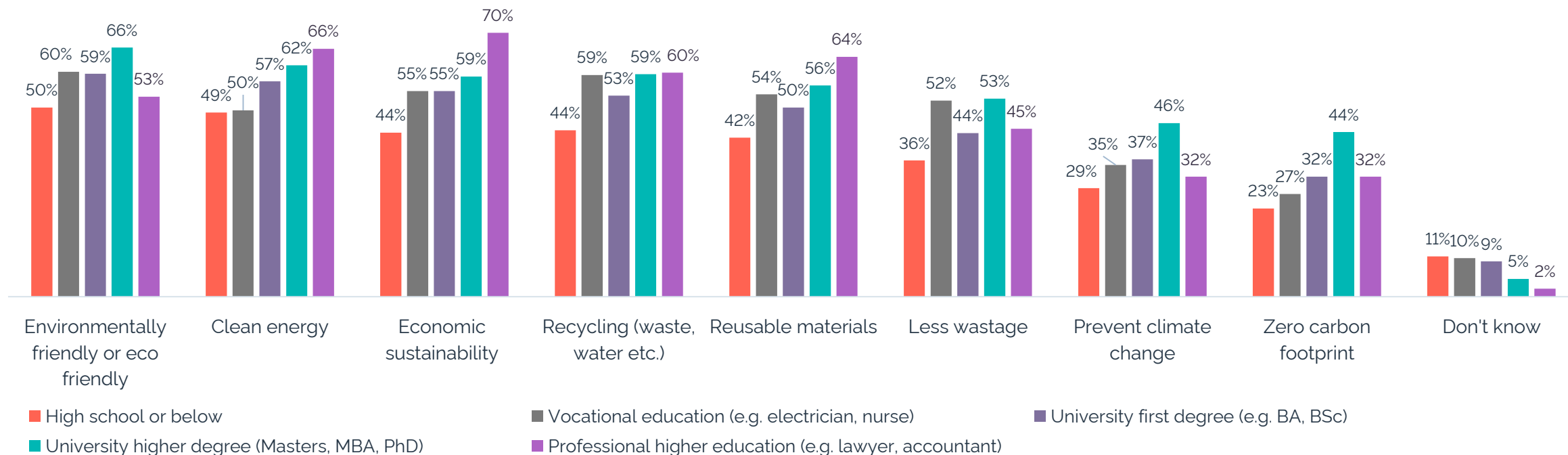
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Sample Size: 16-24 years – 109, 25-34 years – 397, 35-44 years – 282, 45+ years – 213

UNITED ARAB EMIRATES

Consumers with a university degree or higher level of education drive associations of sustainability

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN UAE - BY EDUCATION LEVELS



Source: YOUNGOV PANEL

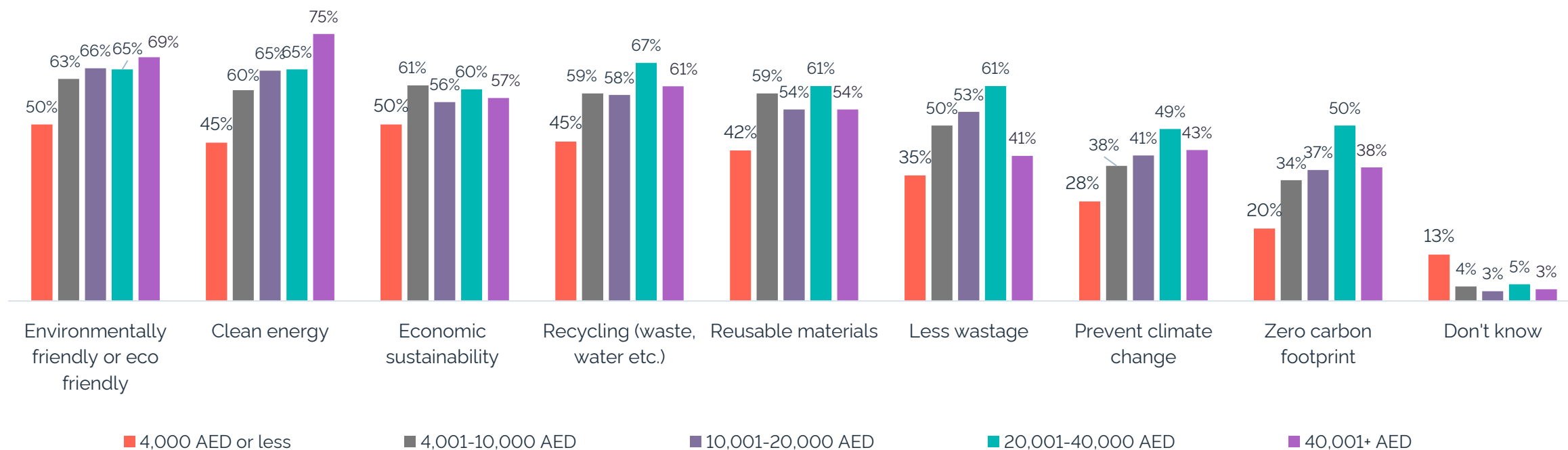
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

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Middle class and higher income groups drive more associations with sustainability.

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN UAE - BY INCOME LEVELS



Source: YOUNGOV PANEL

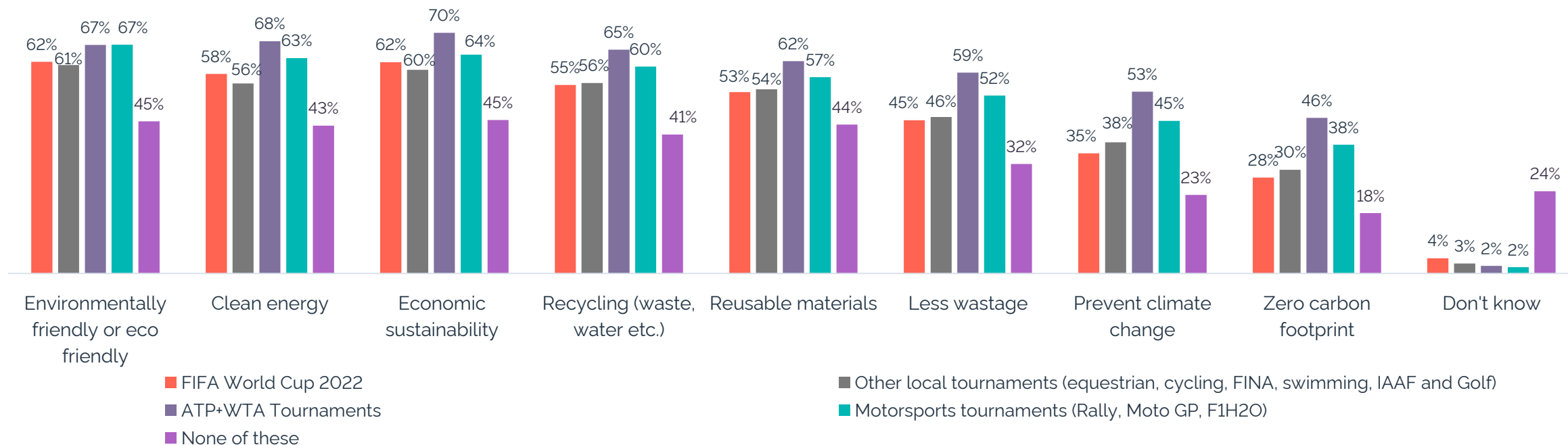
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to you.

Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED- 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

UNITED ARAB EMIRATES

Associations with sustainability were significantly higher among those interested in attending sports events in Qatar vs those who weren't.

PROMPTED ASSOCIATIONS WITH 'SUSTAINABILITY' IN UAE - BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

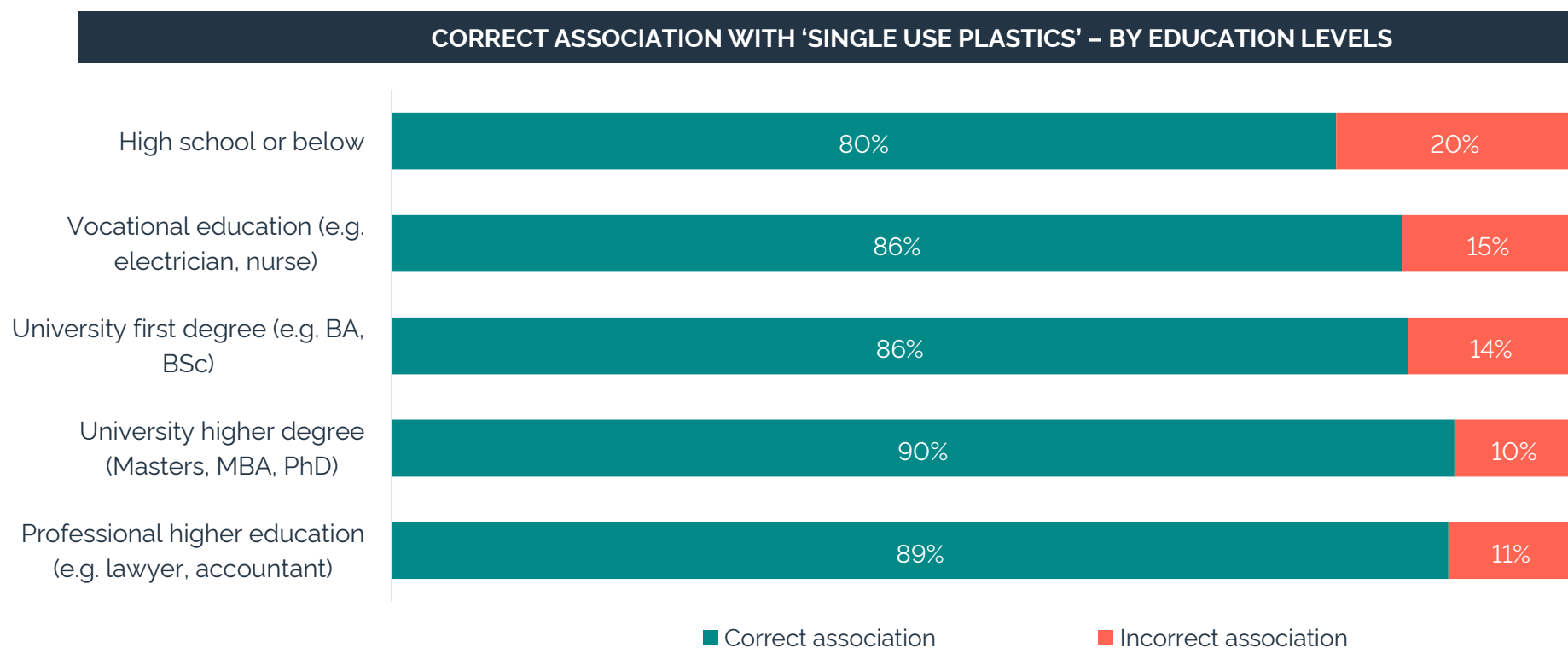
Q: Now looking at the options, which of these words/statements do you associate with the word 'sustainable'? Choose all that apply to

Sample Size: FIFA World Cup 2022 – 428, Other Qatar events – 288, Tennis events – 110, Motorsports events – 145, No sports events – 387

Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Correct associations with the term 'single use plastics' is directly proportional to the education level of the respondent



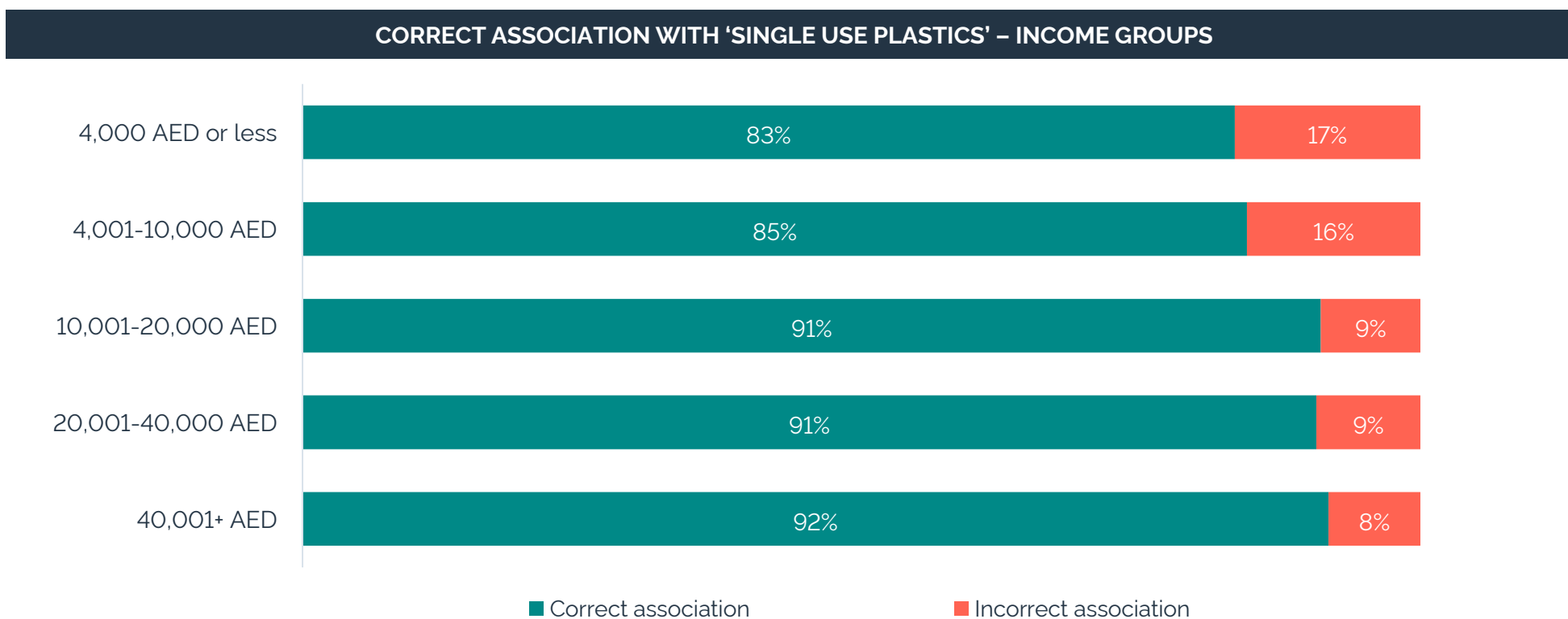
Source: YOUNGOV PANEL

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

Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

UNITED ARAB EMIRATES

Correct associations with 'single use plastics' skews higher income respondent.



Source: YOUNGOV PANEL

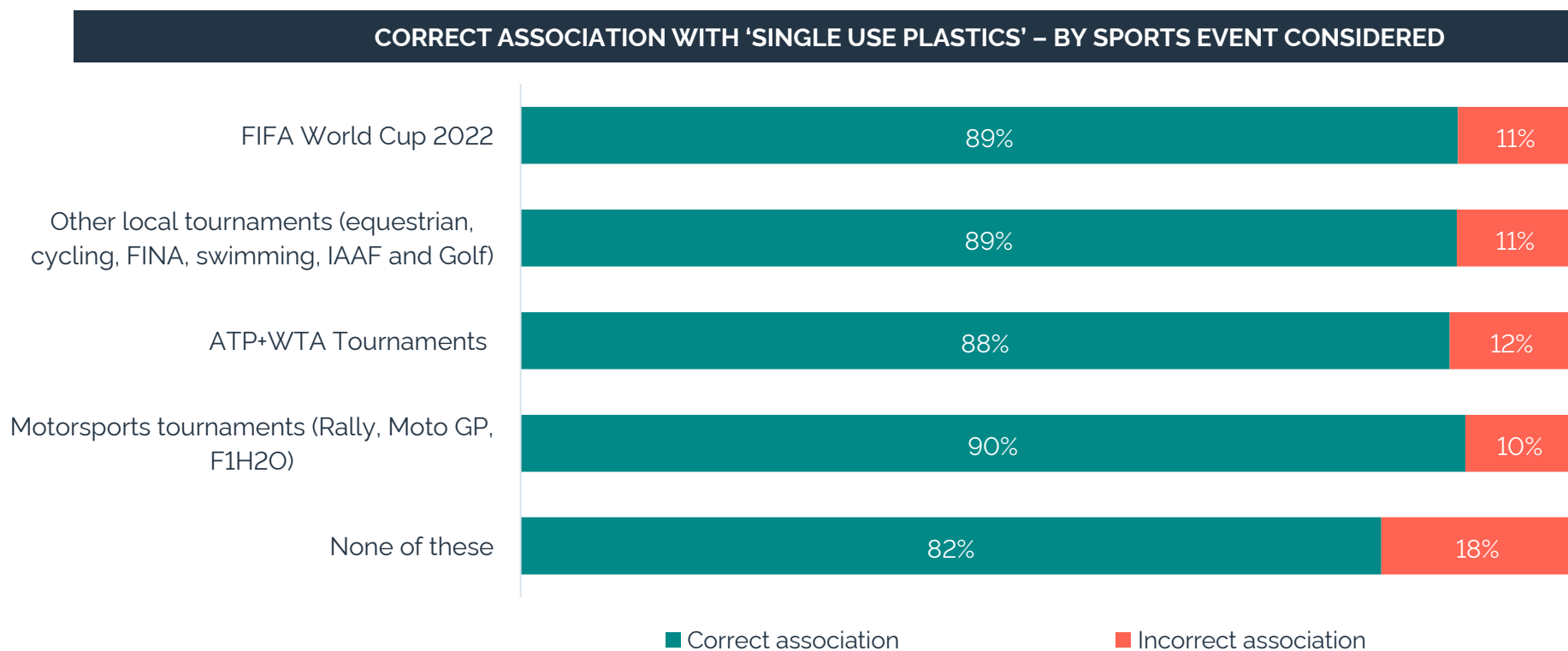
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Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED - 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

↑ Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Those interested in sports events across Qatar correctly identify the meaning of 'single use plastics' more so than those not interested in any sports events



Source: YOUNGOV PANEL

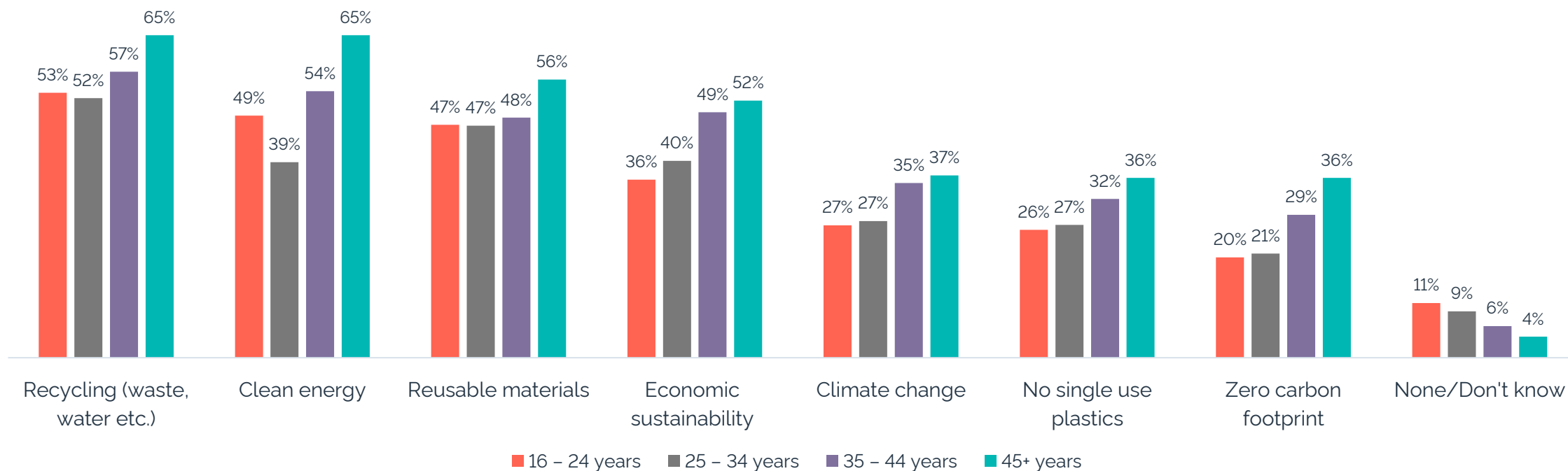
Q: Which of these statements best describes what 'single use plastics' means?

Sample Size: FIFA World Cup 2022 – 428, Other Qatar events – 288, Tennis events – 110, Motorsports events – 145, No sports events – 387

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Sustainability initiatives are more important for the older consumers

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY AGE GROUP



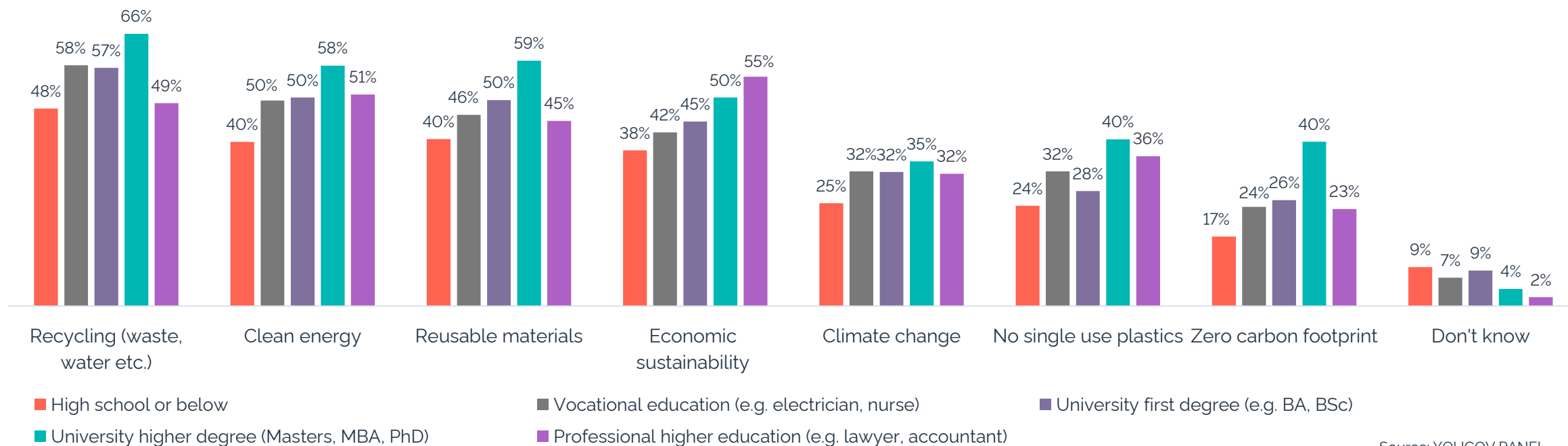
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: 16-24 years – 109, 25-34 years – 397, 35-44 years – 282, 45+ years – 213

UNITED ARAB EMIRATES

Environmental sustainability initiatives like recycling, reusing and clean energy are significantly more important in the daily life of vocational and university degree holders compared to high school or professional degree holders.

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

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

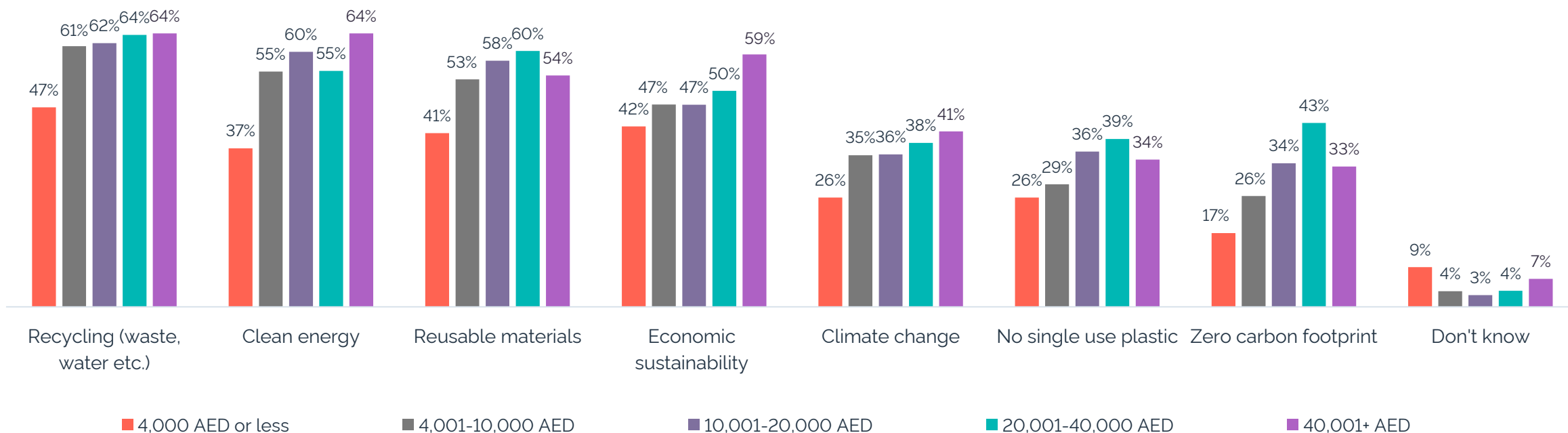
Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

↑ Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Middle class and higher income groups feel that sustainability initiatives are more important in their daily lives compared to lower income households

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY INCOME LEVELS



Source: YOUNGOV PANEL

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

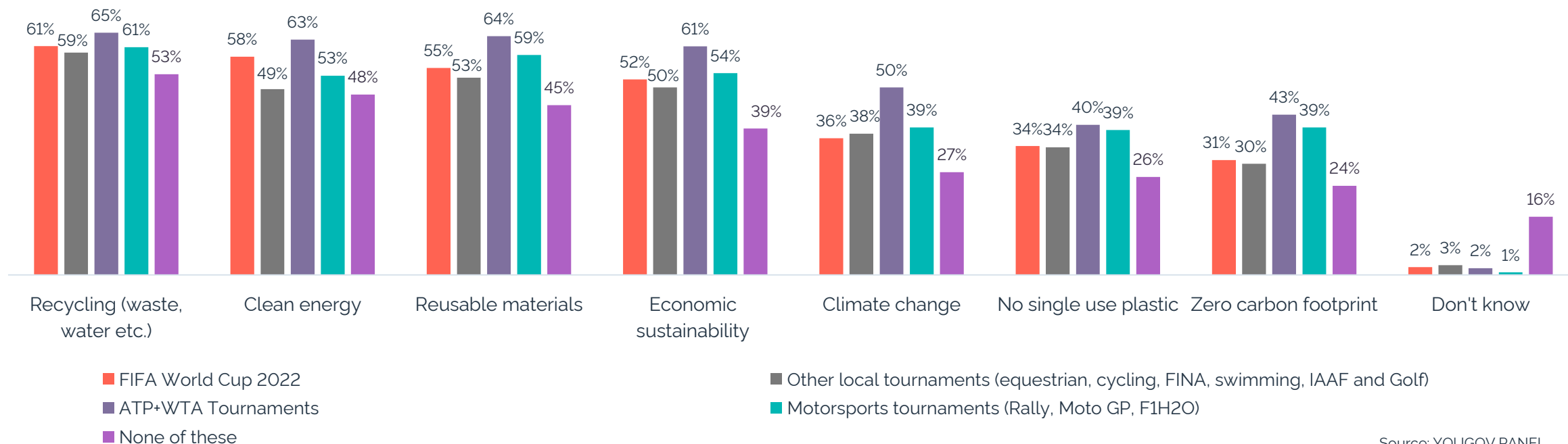
Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED- 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Importance of sustainability initiatives is significantly higher among those interested in attending Qatar sports events vs those who aren't

SUSTAINABILITY INITIATIVES IMPORTANT TO PEOPLE - BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

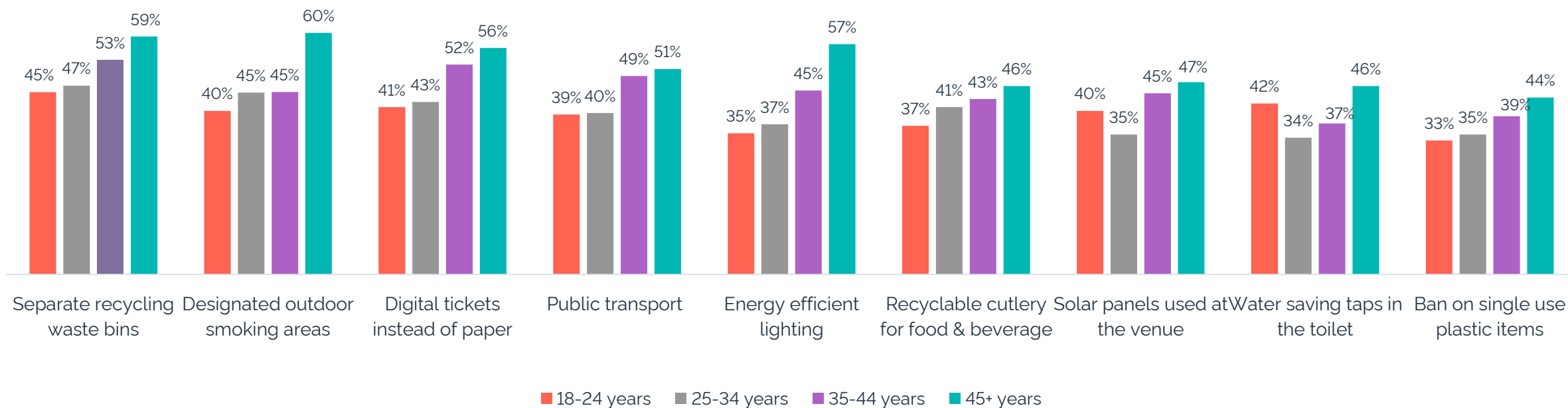
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: FIFA World Cup 2022 – 428, Other Qatar events – 288, Tennis events – 110, Motorsports events – 145, No sports events - 387

UNITED ARAB EMIRATES

The awareness of most sustainability initiatives is driven by older age groups 35+.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

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

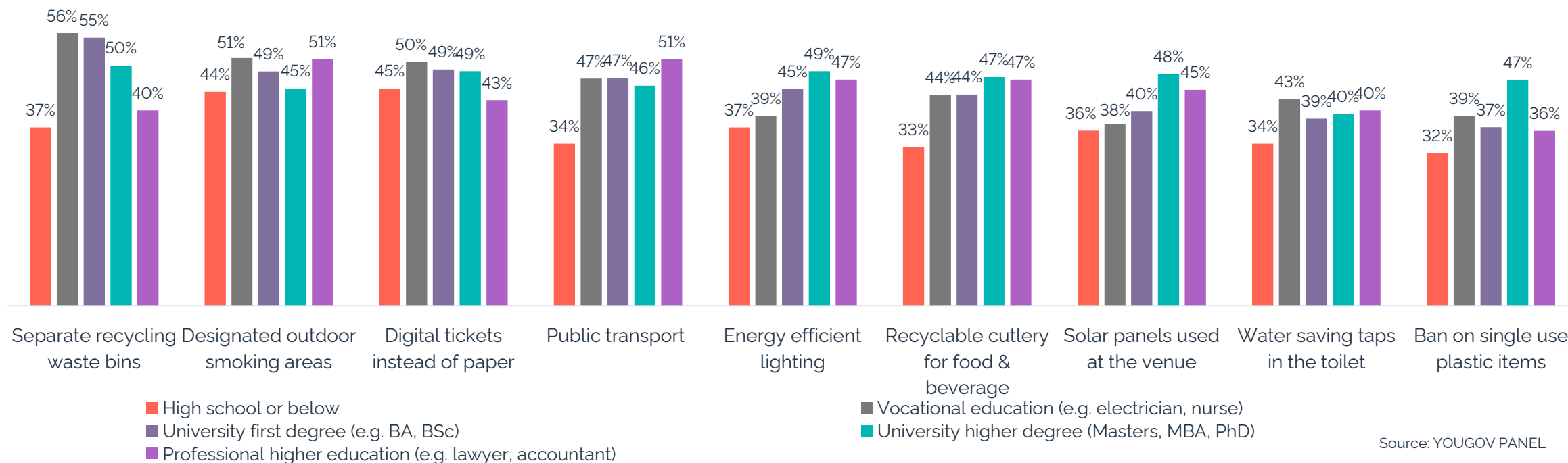
Sample Size: 16-24 years – 109, 25-34 years – 397, 35-44 years – 282, 45+ years – 213

Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Those with a higher education show higher awareness of sustainability initiatives at events.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

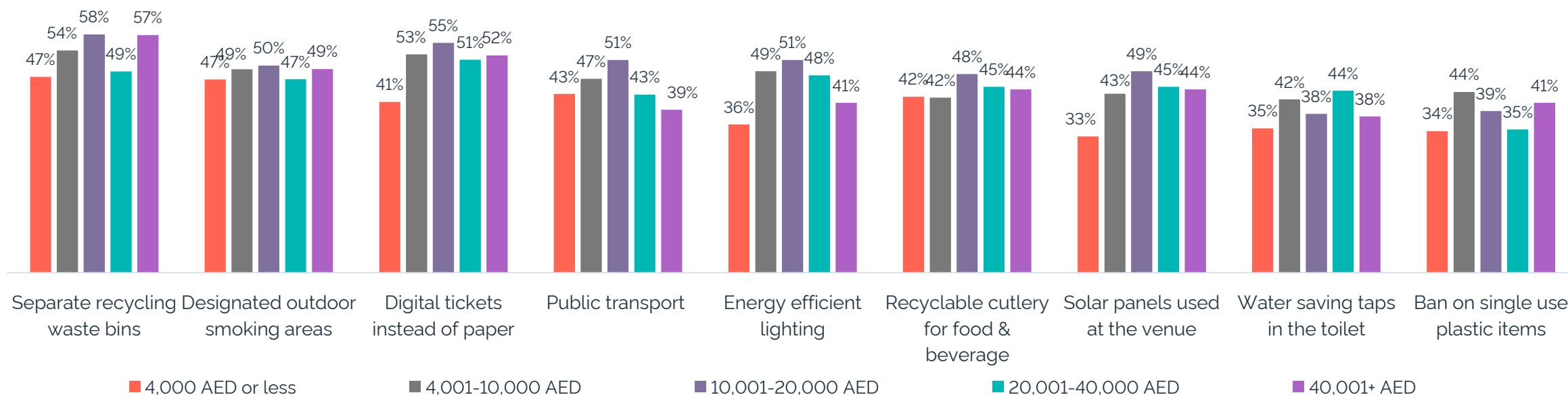
Q: Which of these sustainability initiatives are important to you in your day to day life

Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

UNITED ARAB EMIRATES

Awareness of sustainability initiatives at events is higher among those with monthly household income of 4000 AED+

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

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

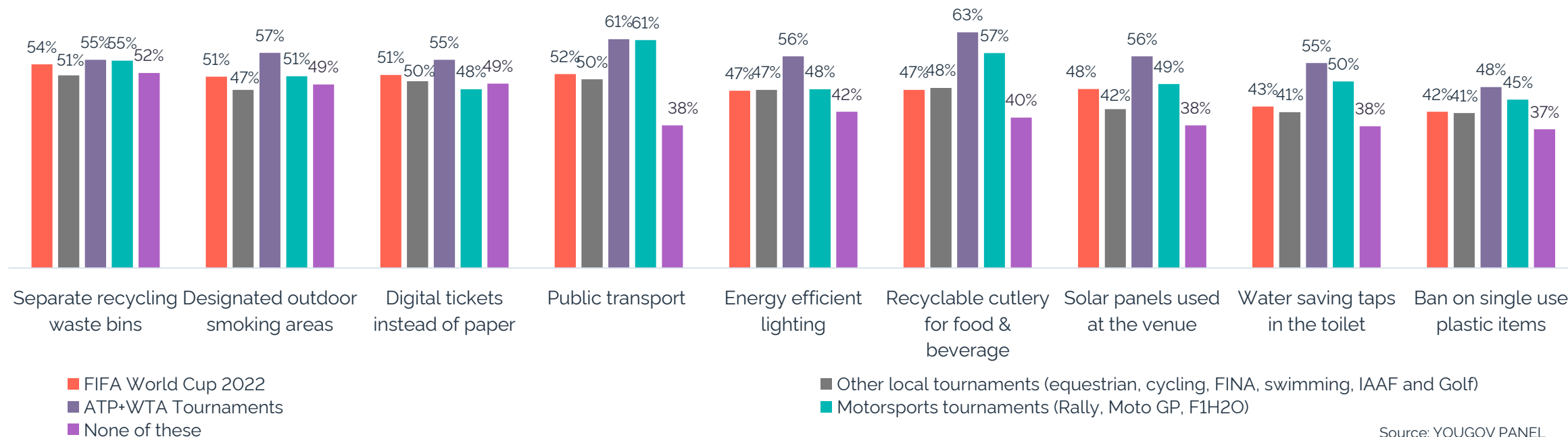
Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED - 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Waste sorting bins have similar awareness among those who attend sports events as well as those who don't, due to these bins being commonly used around the streets of UAE.

AWARENESS OF SUSTAINABILITY INITIATIVES AT EVENTS – BY SPORTS EVENT CONSIDERED



Source: YOUNGOV PANEL

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

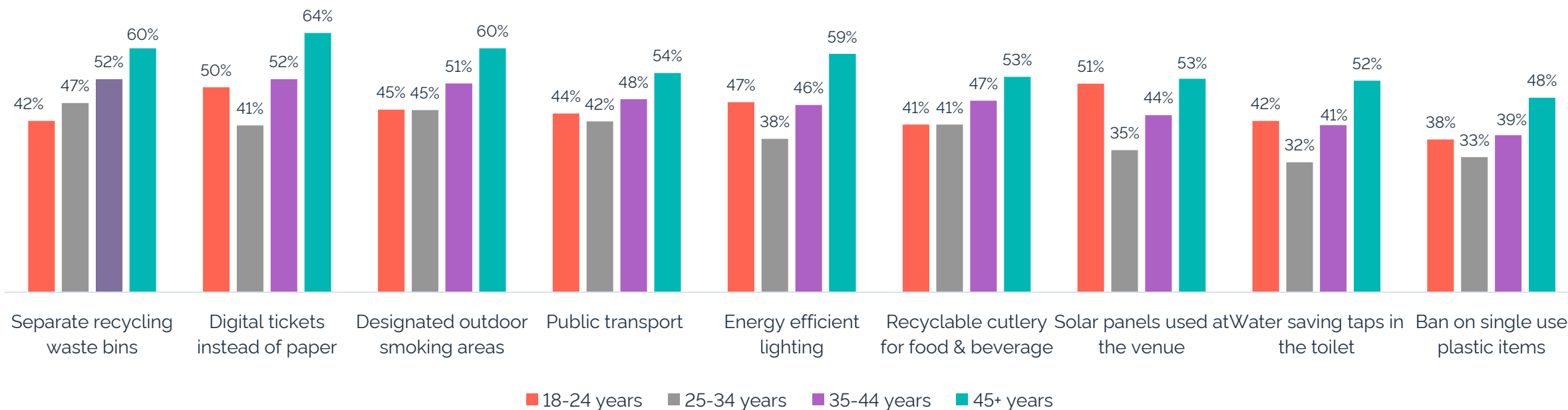
Sample Size: FIFA World Cup 2022 – 428, Other Qatar events – 288, Tennis events – 110, Motorsports events – 145, No sports events – 387

↑ Significant difference at 95% confidence interval

UNITED ARAB EMIRATES

Waste segregation bins, digital tickets and designated outdoor smoking areas are the most important initiatives for the 35+ years group, whereas for the younger age group (18-24 years) energy related initiatives like solar panels and energy efficient lighting are more important

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY AGE GROUPS



Source: YOUNGOV PANEL

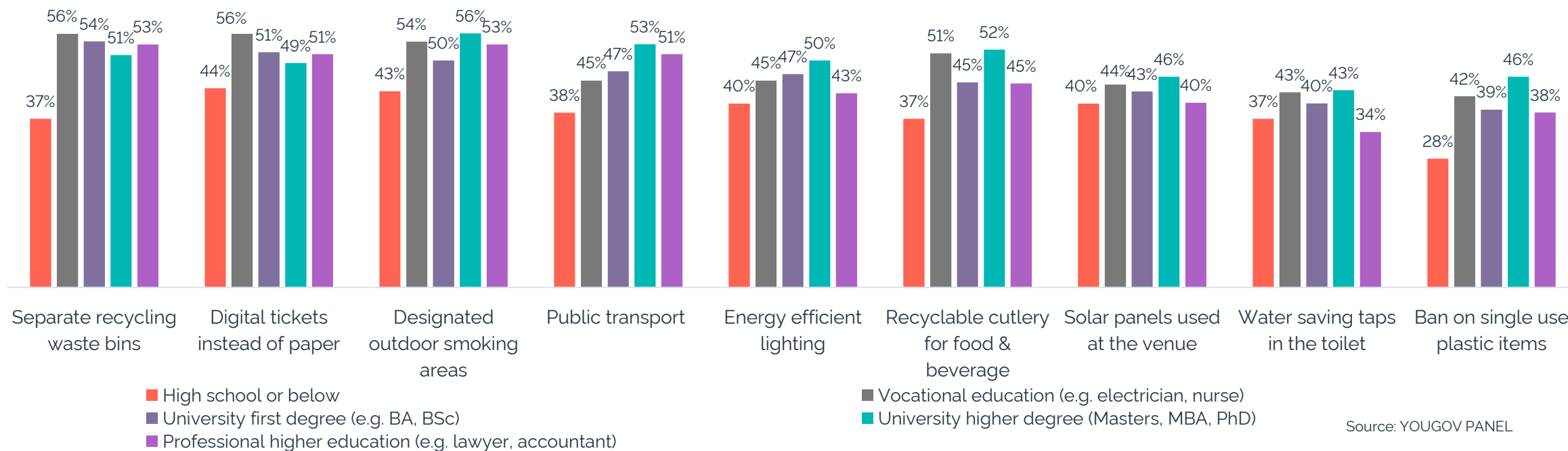
Q: Which of these environmental sustainability initiatives would you expect at venues for large events?

Sample Size: 16-24 years – 109, 25-34 years – 397, 35-44 years – 282, 45+ years – 213

UNITED ARAB EMIRATES

Those with a higher education expect more sustainability initiatives at events. Awareness of digital tickets as a sustainability initiative cuts through education levels.

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY EDUCATION LEVELS



Source: YOUNGOV PANEL

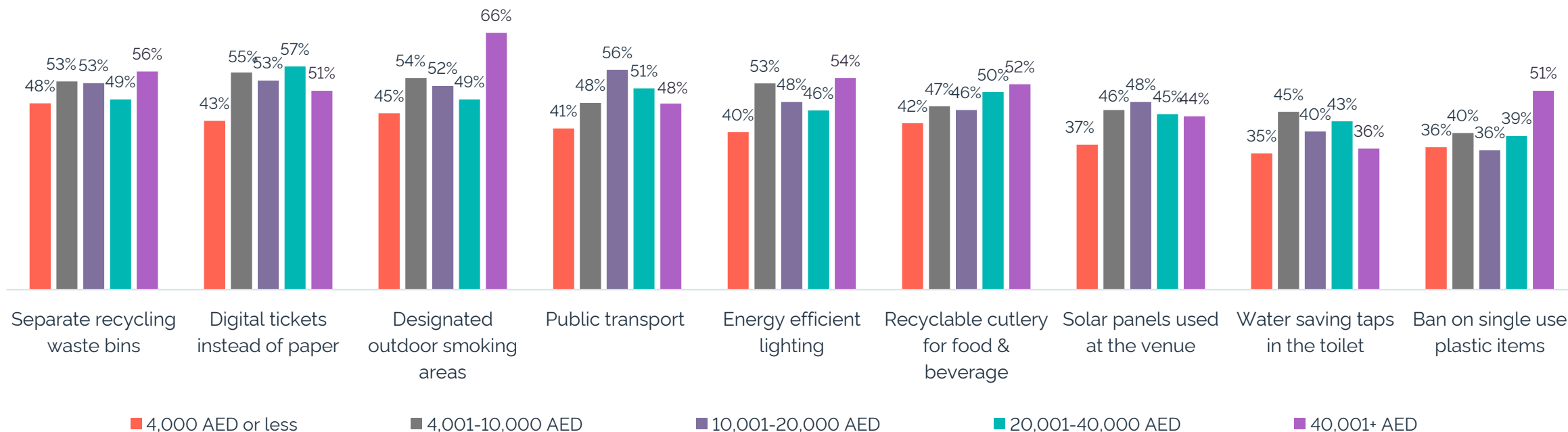
Q: Which of these environmental sustainability initiatives would you expect at venues for large events?

Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

UNITED ARAB EMIRATES

Most of the expected sustainability initiatives at events is driven by the middle class or higher income groups - possibly because they have attended more events and hence are aware of more initiatives

SUSTAINABILITY INITIATIVES EXPECTED AT EVENTS – BY INCOME LEVELS



Source: YOUNGOV PANEL

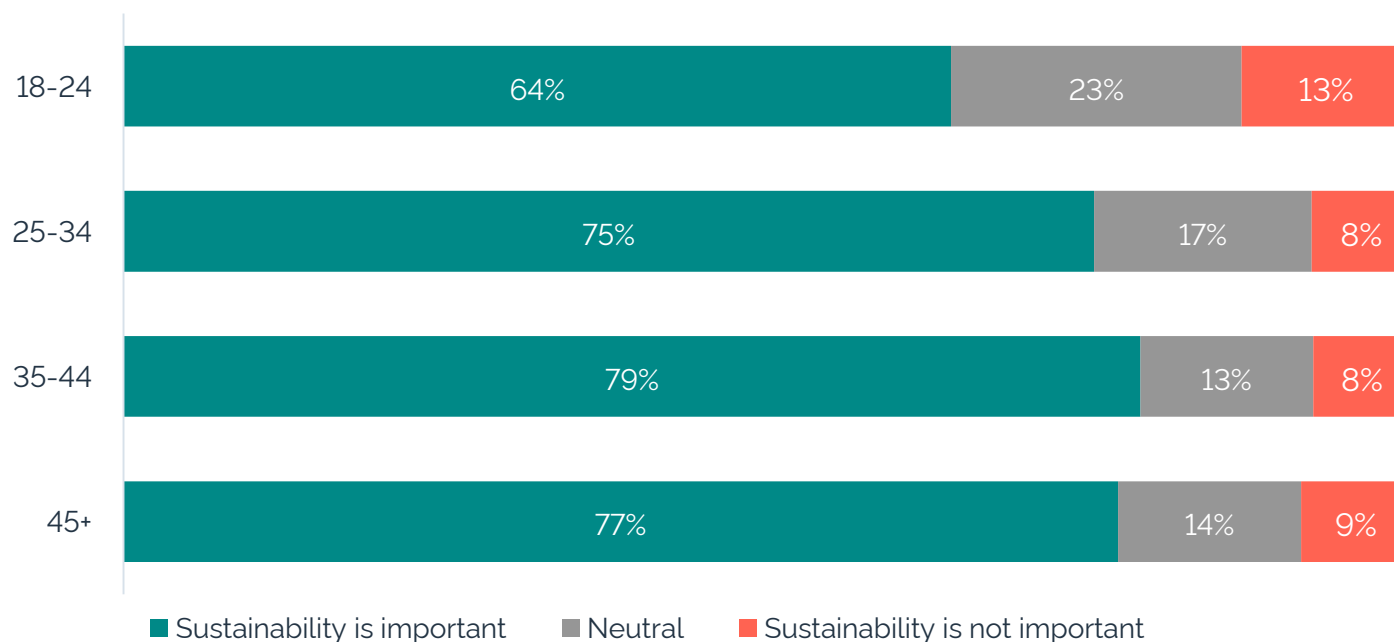
Q: Which of these environmental sustainability initiatives would you expect at venues for large events?

Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED- 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

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Compared to the younger age group of 18-24 years old, sustainability is more of a decision making factor for the 25+ year age group

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY AGE GROUPS



Source: YOUNGOV PANEL

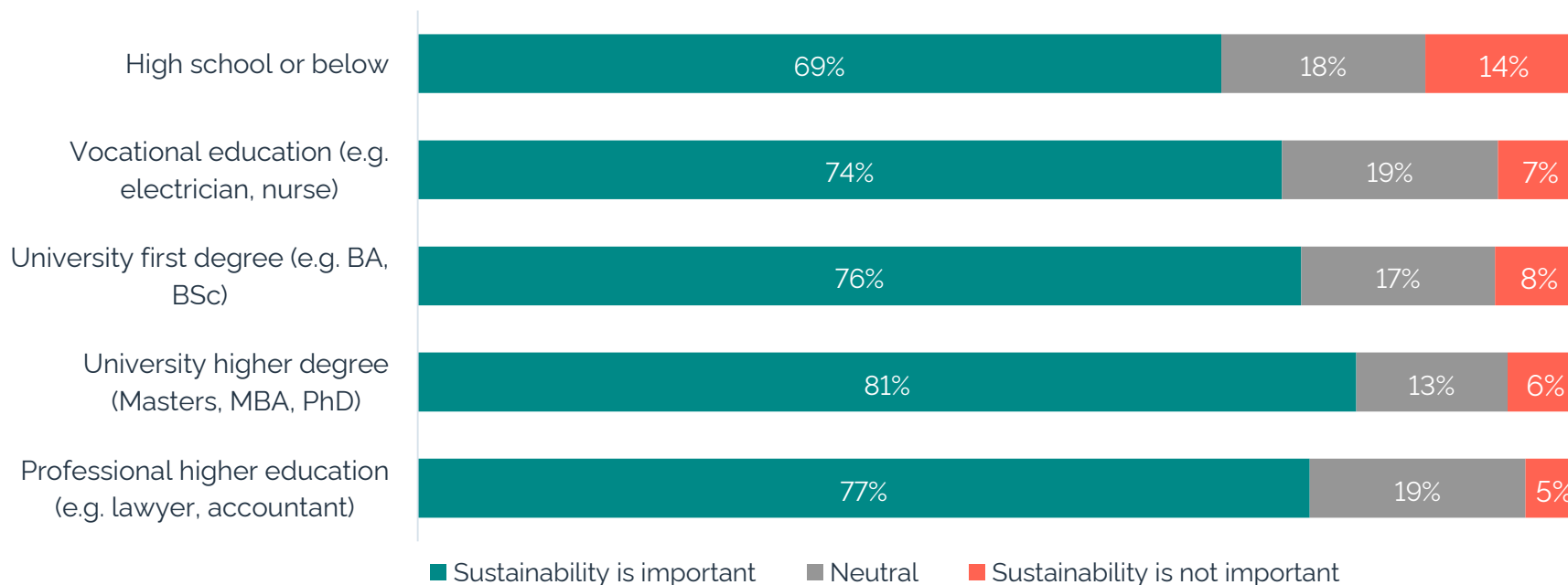
Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: 16-24 years – 109, 25-34 years – 397, 35-44 years – 282, 45+ years – 213

UNITED ARAB EMIRATES

Sustainability is also a significantly bigger decision making factor to attend events among those with an education of high school or above

SUSTAINABILITY AS AN EVENT ATTENDANCE DECISION MAKING FACTOR – BY EDUCATION LEVEL



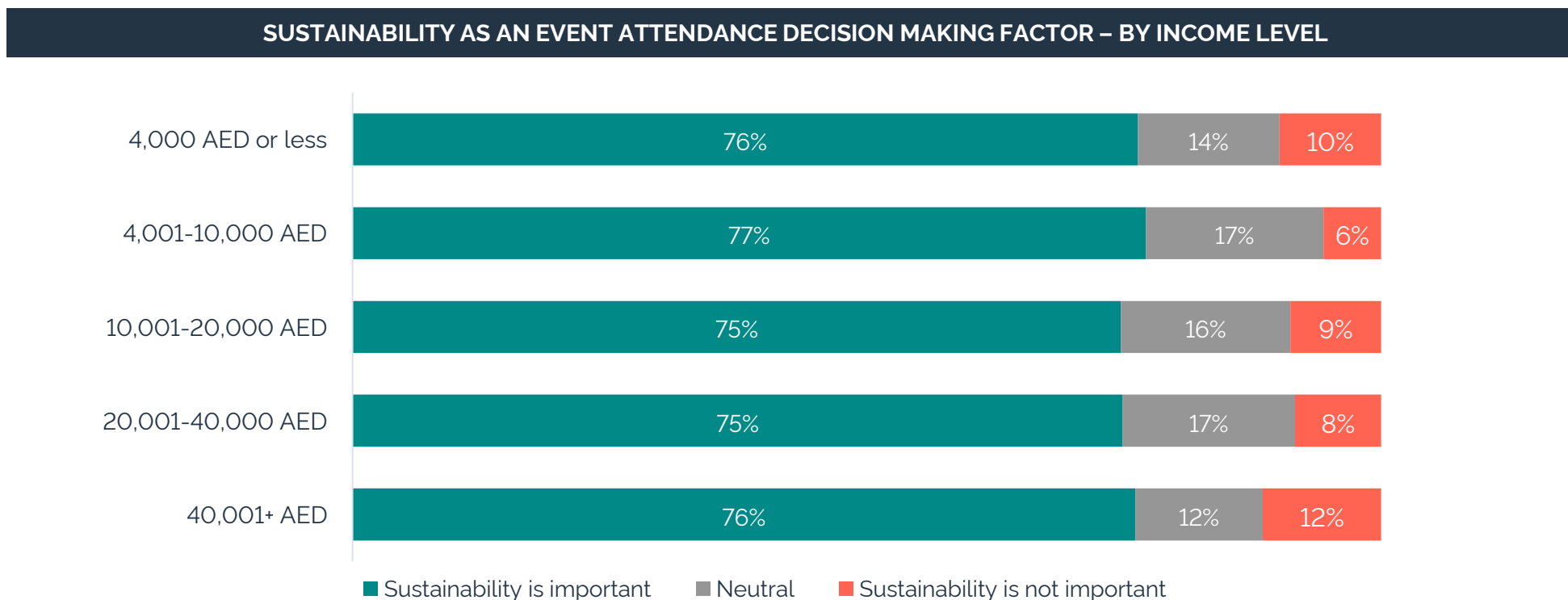
Source: YOUNGOV PANEL

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

Sample Size: High school or below – 149, Vocational education – 117, University first degree – 501, University or higher – 169, Professional higher education – 47

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Sustainability initiatives have similar importance as decision making factors among all income groups



Source: YOUNGOV PANEL

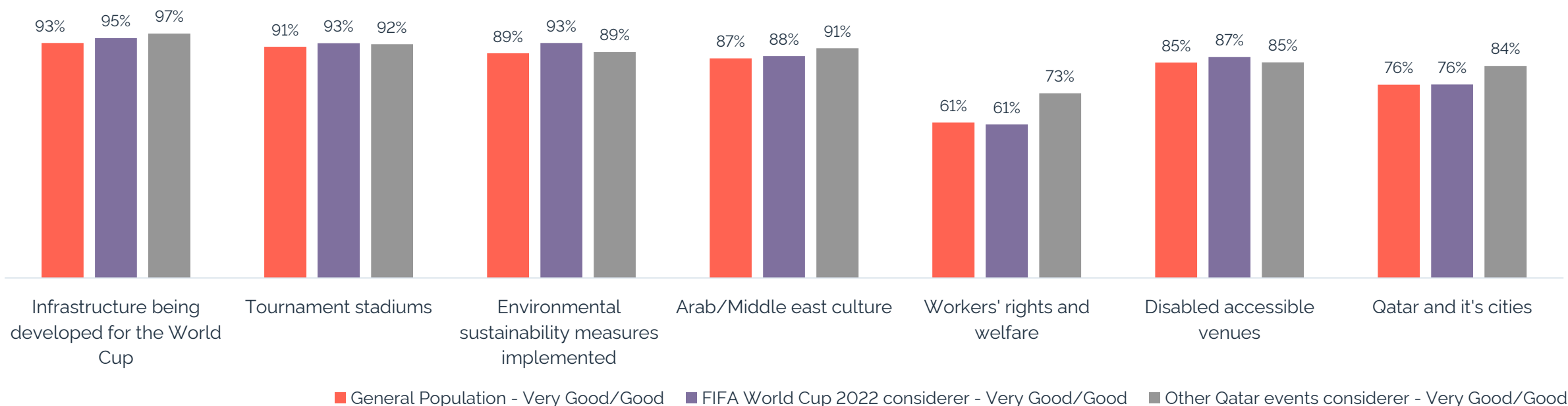
Q: When you consider attending a sports/entertainment event of your choice, how important are the following attributes in your decision making?

Sample Size: 4,000 AED or less - 313, 4,001-10,000 AED- 220, 10,000-20,000 AED - 146, 20,001-40,000 AED - 107, 40,001+ AED - 61

UNITED ARAB EMIRATES

Those aware of the various aspects rate them high across general population as well as those interested in FIFA World Cup 2022 and other Qatar events. Qatar's image on workers rights and welfare still needs work

POSITIVE IMPRESSION OF FIFA WORLD CUP 2022 QATAR ON VARIOUS ASPECTS



Source: YOUNGOV PANEL

Q: Now, from the news and information that you know about this tournament, how would you rate the Qatar FIFA World Cup on the following?

Sample: Those aware of each aspect among general population, FIFA World Cup 2022 considerers and other Qatar events considerers

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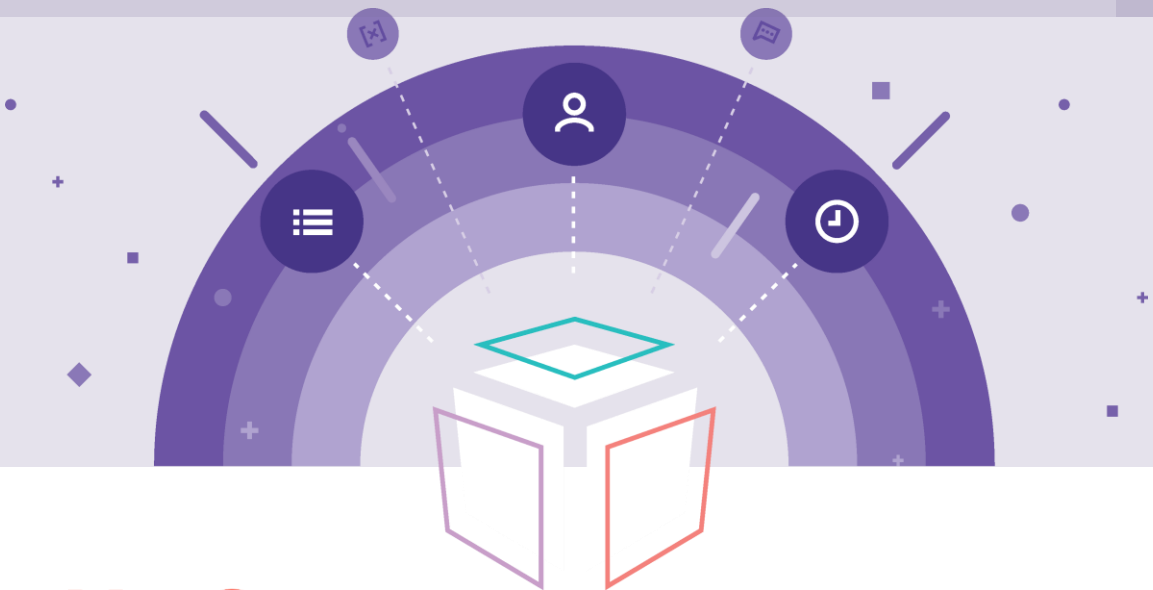
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Sponsorship Valuation	FootballIndex
Sponsor Fit Analysis	DestinationIndex
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Economic Impact Assessment	RealTime / Omnibus Surveys
	Bespoke Consumer Surveys