



SPORTS SECTOR IN QATAR

CURRENT STATE ASSESSMENT SERIES

2021



QDB

بنك قطر للتنمية
QATAR DEVELOPMENT BANK



INTRODUCTION

QDB has embarked key service sectors on a journey to achieve the National Vision 2030 and National Development Strategy 2018 -2022 objectives. As a result, to accomplish a diversified economy that gradually reduces the dependence on hydrocarbon industries, enhances the role of private sectors and maintains its competitiveness through sustainable development and localization of services in the state of Qatar.

Although the Services Sector is well-established in the region, preference is mostly given to international service providers. Focused sectors were assessed to highlight the asymmetrical deployment between services that are being offered locally and services sourced from outside.

The Sports report is part of the 5 series of the Current State Assessment publication, this subsector was selected following a strict sector filtering and prioritization framework based on presence of local champions, sector size, growth and scalability as well as existence of opportunities emerging from the COVID-19 pandemic. Beyond the assessment of the sector, QDB has studied local gaps in the local market for sports-related services and subsequently identified investment opportunities for new services.

CEO'S MESSAGE



Abdulrahman Hesham Al-Sowaidi

Acting Chief Executive Officer,
Qatar Development Bank

As part of Qatar's efforts to develop its private sector and bring progress to the country's Entrepreneurship, SME, and Innovation Ecosystems towards the realization of its national vision for 2030, Qatar Development Bank (QDB) continues to advance its role as the Entrepreneur's and SME's growth partner from ideation to fruition.

QDB continues to make strides in its transformation and reinvention journey while meeting the aspirations of Qatari business owners throughout their journey with a multitude of symbiotic initiatives and growth platforms that perpetually expand possibilities for forward-looking SMEs and entrepreneurs and empower them to play an even bigger role in Qatar's transformation into a diversified knowledge-based economy and a global leader in business and innovation.

In line with its objectives to establish reliable data and analysis as a prerequisite for the formation of new ventures on a sound and viable business basis, and extend meaningful support to Qatari entrepreneurs, QDB has published a series of five current state assessment reports across service sectors. To bring a fresh new outlook on potential services and arms entrepreneurs with relevant information and perspectives that can be leveraged to enter those sectors and their niches with confidence.

This report covers Qatar's sports sector with a focus on the country's rise as a global sports events destination and the rise of eSports and digitally powered experiences. Qatar's journey to becoming the world's sports hub is well underway, as it prepares to host five prestigious international events over the next eight years – including the FIFA World Cup in 2022 and Asian Games in 2030. Valued at ~QAR1.8 billion, the country's spectator sports market has grown by 7% CAGR between 2017 and 2019. A largely young demographic (63% of the population is aged 13-44), recovering consumer sentiment (6.2% CAGR growth in discretionary spending on leisure expected between 2020 and 2024) and growing awareness of the benefits of physical activity will provide a significant boost to the industry.

The global sports industry in recent years has undergone significant structural changes, with a greater focus on inclusion and digitally dominant experiences. Modern technologies like AR and analytics, and digital platforms are gradually shaping immersive experiences for athletes and fans alike. This changing dynamic is manifesting locally as well, where the eSports market continues to gain ground and Qatar hosting Global Games from 2020 to 2022. In keeping with global trends, Qatar has also seen a rise in the number of registered women athletes (9% CAGR between 2016 and 2020), which bodes well for the women's sports ecosystem in the country.

The Qatar National Vision 2030 and the Second National Development Strategy 2018-2022 lay great emphasis on sports excellence as an agent of economic diversification, cultural enrichment, and social change. Sustained investments in building modern facilities, stadiums, and academies, encouraging and managing domestic talent, and promoting regional and international events will continue to contribute to the country's rapidly evolving sports culture.

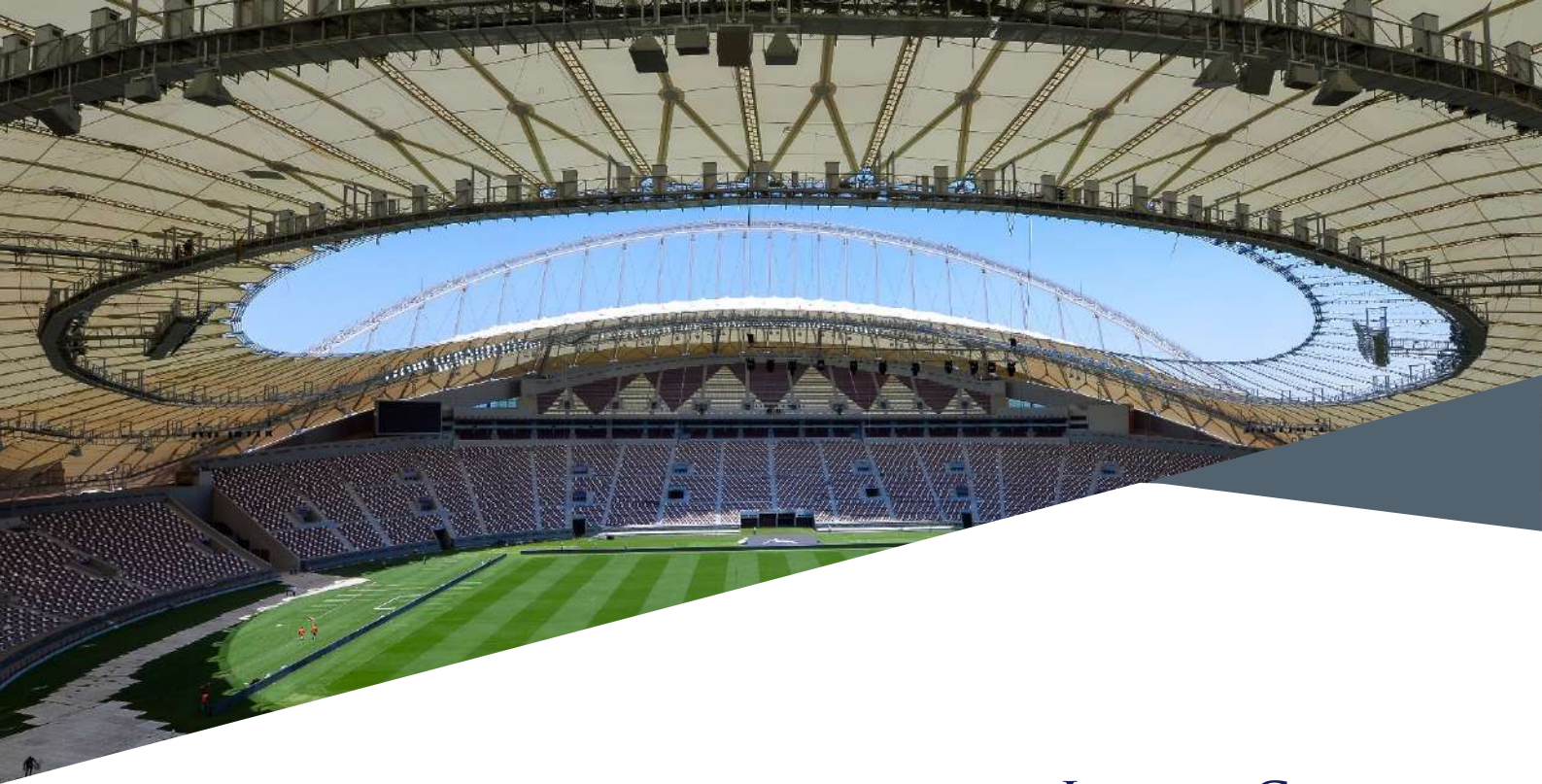
I invite readers to go through the report to gain valuable insights and in-depth knowledge and understanding of this sector's prospects.

Abdulrahman Hesham Al Sowaidi
Acting Chief Executive Officer



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APPENDIX: GLOSSARY OF TERMS

Table 1: Glossary of Terms

3DAT	3D Athlete Tracking
AR	Augmented Reality
Bn	Billion
CAGR	Compound Annual Growth Rate
F&B	Food and Beverage
FIFA	Fédération Internationale de Football Association
GDP	Gross Domestic Product
ICT	Information and Communications Technology
KSA	Kingdom of Saudi Arabia
MENA	Middle East and North Africa
Mn	Million
MoU	Memorandum of Understanding
NBA	National Basketball Association (United States)
NCD	Non-Communicable Disease
NTC	Nike Training Club
pp	Percentage points
QAR	Qatari Riyal
QDB	Qatar Development Bank
QFC	Qatar Financial Center
QOC	Qatar Olympic Committee
QST	Qatar Sportstech
R&D	Research and Development
SC	Supreme Committee for Delivery & Legacy
SME	Small and Medium Enterprises
UAE	United Arab Emirates
UK	United Kingdom
US/USA	United States of America
USD/US \$	United States Dollar
VR	Virtual Reality

LOCAL ECOSYSTEM



Qatar's sports landscape is governed by regulators and enabling entities.

- **Regulators** : The **Ministry of Sports and Youth** is the sponsor and regulatory body concerned with the Cultural and Sports Sector, focused on reviewing and updating the legislative structure, and developing general policies for Qatar's culture, sports and youth. The Ministry oversees sports licensing in the country and works to enhance the efficiency of institutional work and sports clubs.

Besides, the Qatar government has tried to establish regulations to incentivise and accelerate foreign investments. For example, the Qatar Investments Law no. 13 of 2000 permits non-Qatari investors to exceed the proportion of their contribution of 49% up to 100% of project capital in cultural and sports activities

- **Enabling entities:** There are two other public bodies that provide further regulatory and licensing support and are tasked with supervising the major sporting events held in the country.
 - The **Supreme Committee for Delivery & Legacy (SC)** is in charge of delivering the proposed tournament venues and projects for the 2022 FIFA World Cup – the first to be held in the Middle East – while ensuring that its preparations align with the Qatar National Vision 2030.
 - **Qatar Olympic Committee (QOC)** supervises the various national sports federations and institutions in both administrative and technical capacities.

Sports federations and associations come second in the chain of governance. These are mainly tailored towards individual sports, with each body responsible for the promotion and organisation of its discipline at different levels.

Owing to the multifaceted nature of the industry, the key **delivery stakeholders** in sports belong to a variety of domains – ranging from sports clubs and event organisers to businesses involved in facility management, as well as broadcasting and advertising companies.

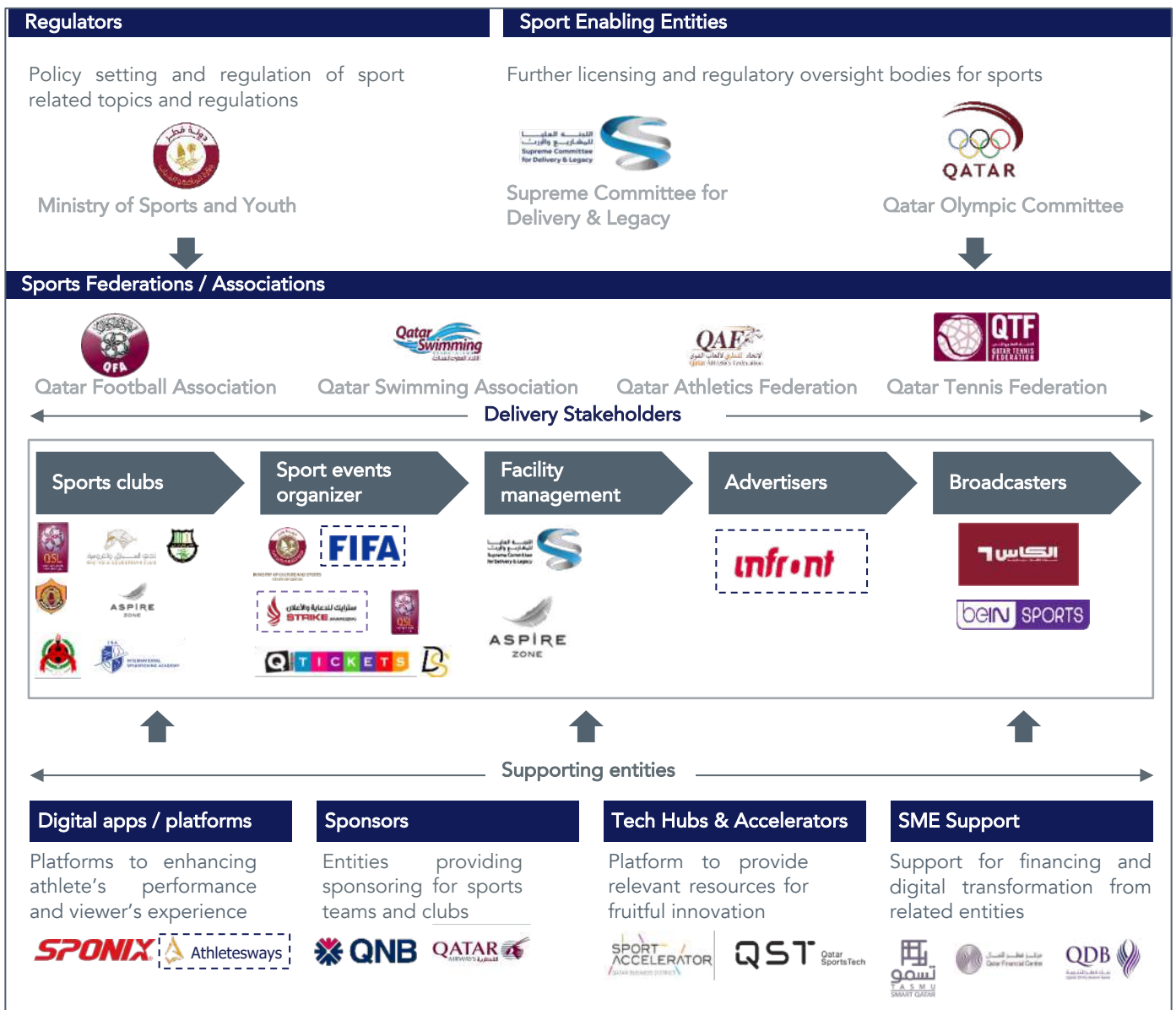
Supporting the growth of these stakeholders are a number of **associated entities:**



- **Digital apps/platforms** help with monitoring and enhancing the performance of athletes while also engaging viewers beyond physical events.
- **Sponsors** generate funding and exposure for sports teams and clubs.
- **Tech hubs and accelerators** create platforms that provide necessary resources and encourage innovation. One example is Qatar SportsTech which is a leading startup accelerator for innovative sports companies. Additionally, the Qatar Financial Centre (QFC) signed a Memorandum of Understanding (MoU) in 2018 with the Aspire Zone Foundation to establish a Sports Business District and attract large sports-related multinationals by offering unique incentives and service packages.
- **Small and medium-sized enterprises** support the financing and digital transformation of the sector and its related entities.



LOCAL ECOSYSTEM

Figure 1: Sports Ecosystem in Qatar



 International companies
 e-sports



VALUE CHAIN

Table 2: Value Chain

Analysing Qatar's sports value chain helps identify and understand the key services and stakeholders involved. The value chain is spread across four core segments, with established local and global companies.

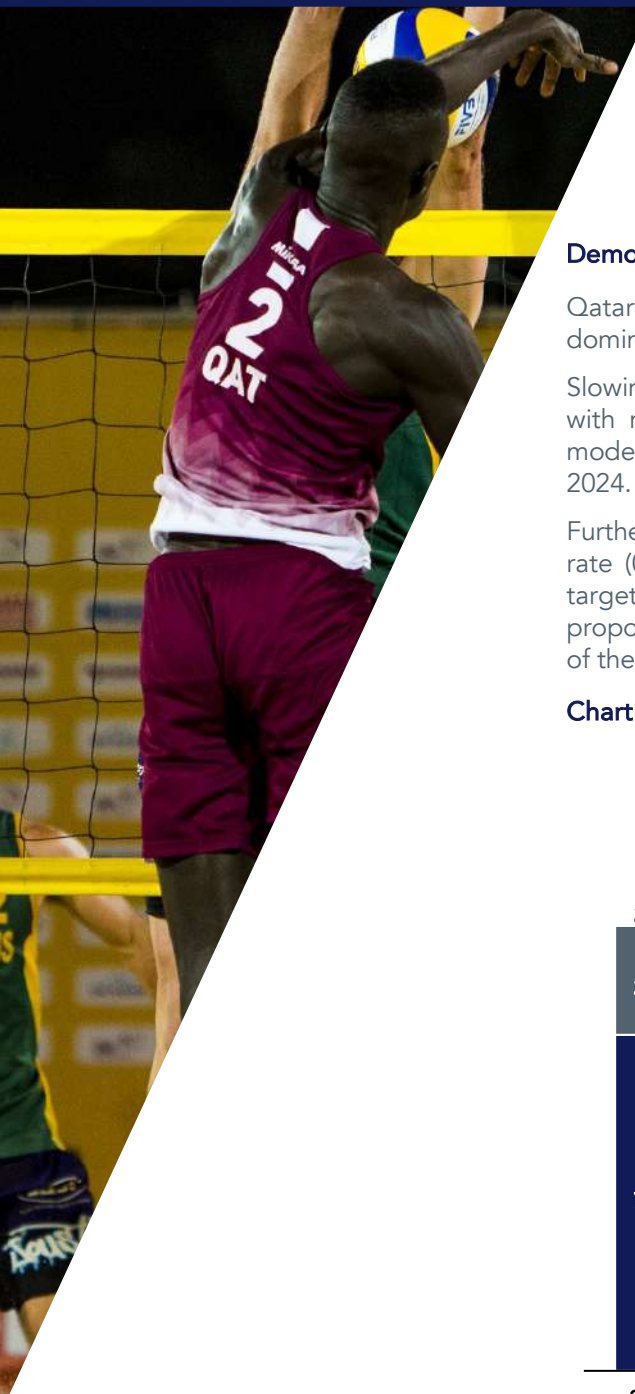
Segment	Description	Activities/Services involved	Global players*	Local players*
Sports development	Focuses on how people engage with sports, ranging from amateur to professional levels	<ul style="list-style-type: none"> Sports clubs (e.g., football sport clubs and eSports club) Sports halls and centres Sports and recreation education (e.g., gymnastics instruction and horse-riding schools) Sports agents/agencies Sports application development (including data analytics and VR training) 		
Event management & promotion	Refers to the entire process of staging an event from the bidding phase to delivery and post-event work	<ul style="list-style-type: none"> Administrative and supporting activities (like bidding support) Organisation of conventions and trade shows (crowd management) Promotion and advertisement of sport events, along with other activities undertaken by the event producers and promoters 		
Venue operations & maintenance	Comprises activities necessary to operate and maintain stadiums and venues	<ul style="list-style-type: none"> Sport stadium operations (e.g., football stadiums, racetracks, golf courses, fitness centres and eSports stadiums) Landscape care (e.g., greenery and water) Sport facilities and equipment maintenance 		
Sports commercialisation	Brings into focus the commercial aspect of sports in a manner that is managed and marketed; sponsorship and media have a significant influence on the sector	<ul style="list-style-type: none"> Reservation service and related activities (e.g., ticketing, booking, etc.) Distribution rights acquisition and management Broadcasting sports events Sponsoring of recreational and cultural activities 		

*Non-exhaustive

e-sports

Support activities	Sport education	Sport medicine	Sport nutrition	Sport goods	R&D innovation
	Sport tourism	Transportation	Infrastructure	F&B services	ICT

SECTOR MARKET DRIVERS



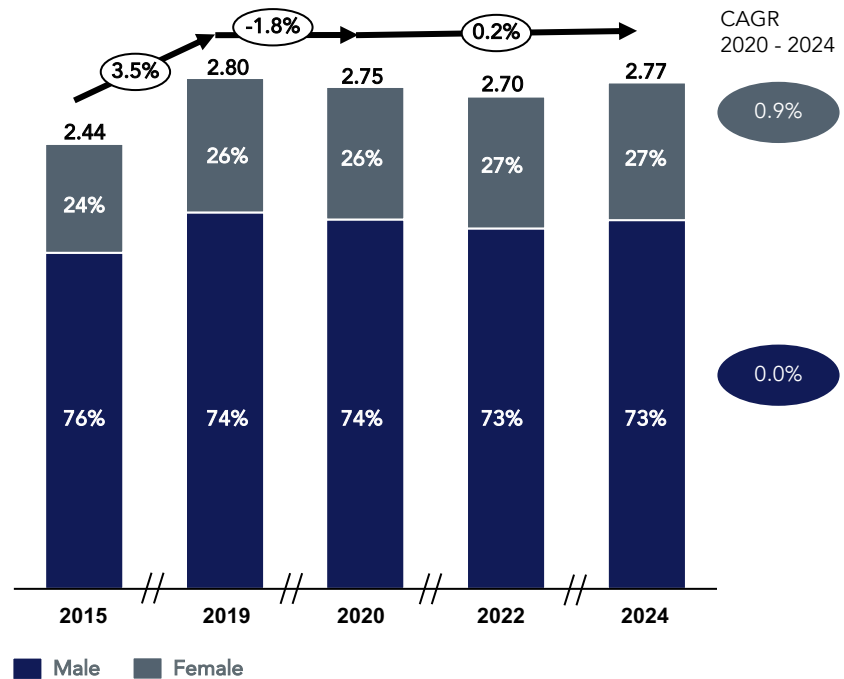
Demographic Dividend [↔ Neutral Impact]

Qatar’s population is forecast to grow moderately at 0.2% CAGR, with a dominant youth population supportive of the sports market.

Slowing growth in population (0.2% CAGR between 2020 and 2024), along with muted inflow of expats owing to COVID-19, is expected to have a moderate impact on the demand for sports services and activities through 2024.

Further to that, Qatar’s women population is projected to grow at a faster rate (0.9% CAGR between 2020 and 2024) than men, thus expanding the target audience for sports in the country. This, combined with a high proportion of youth (63% of the population aged 13-44), will drive the growth of the sports service market in Qatar.

Chart 1: Qatar Current and Forecast Population by Gender (Mn)



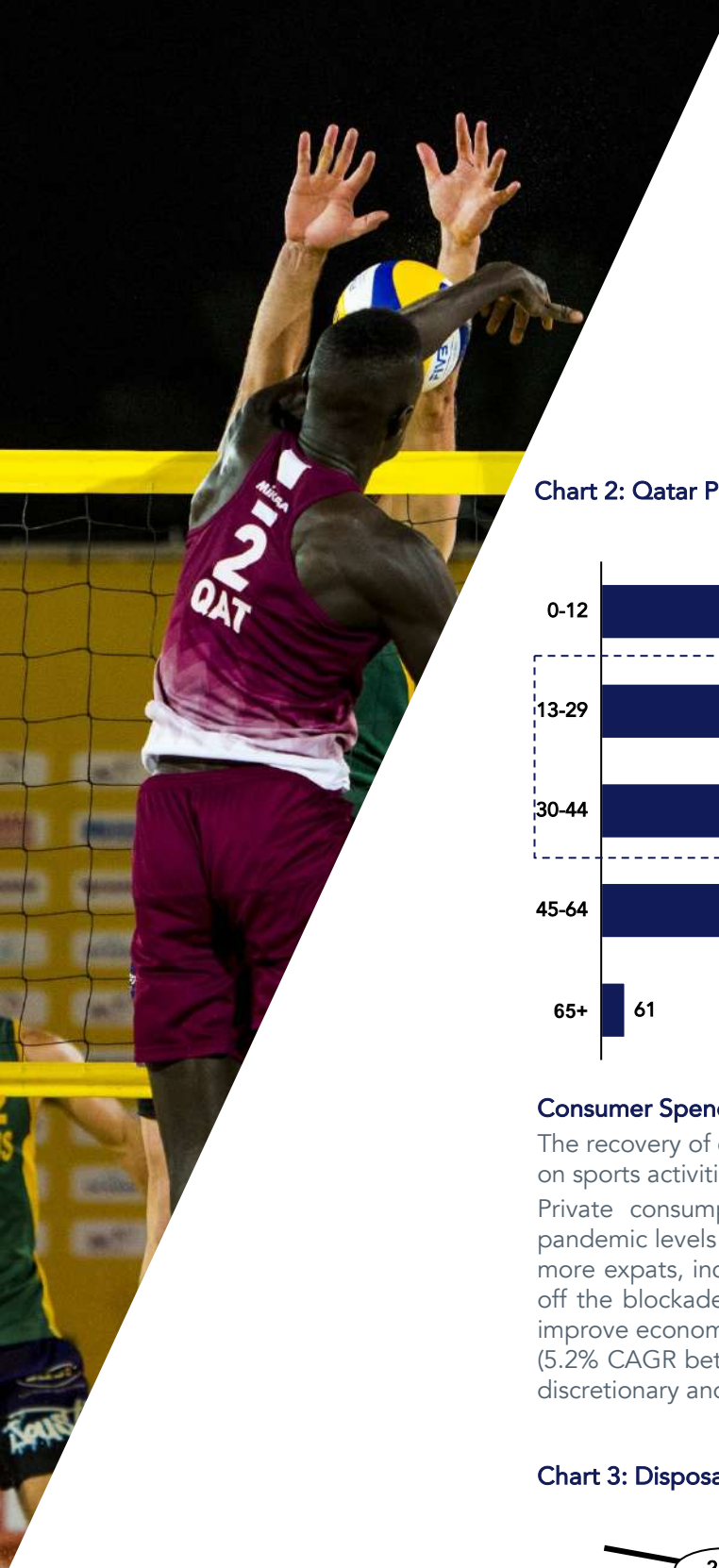
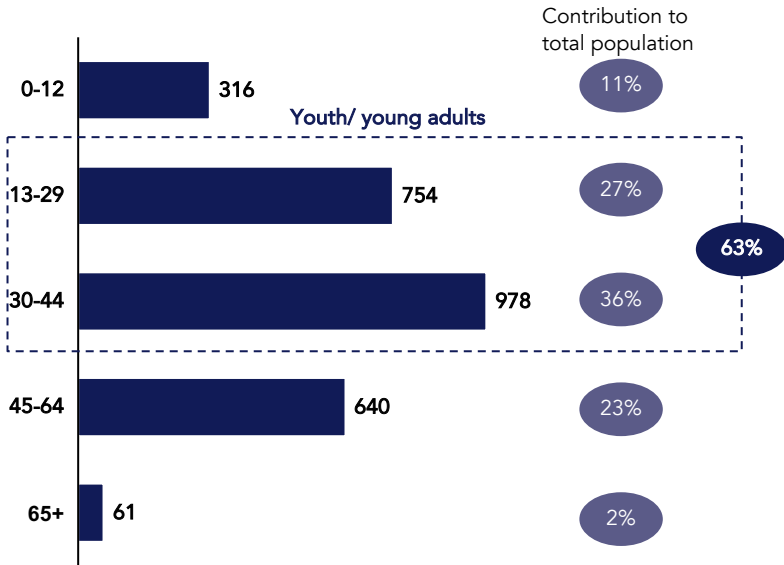


Chart 2: Qatar Population Split by Age Group (000's, 2020)

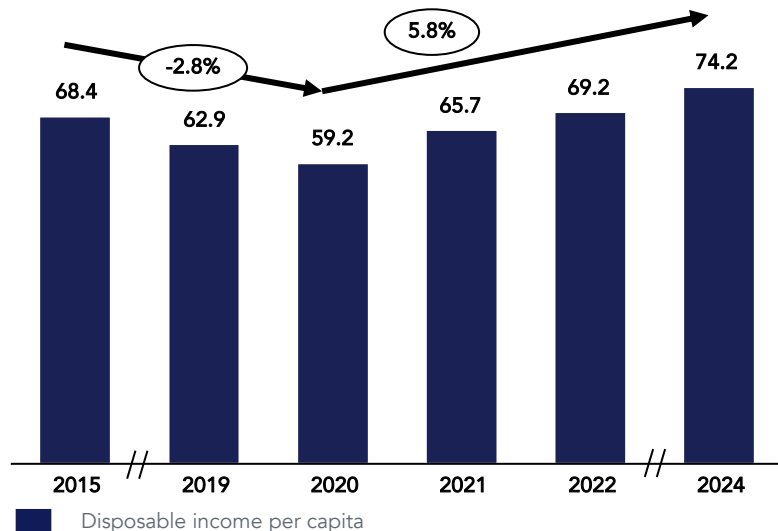


Consumer Spending [↑ Positive Impact]

The recovery of consumers' spending power is expected to drive expenditure on sports activities.

Private consumption and GDP per capita are expected to match pre-pandemic levels by 2021. In the longer term, the Government seeks to attract more expats, increase the participation of women in the workforce and ease off the blockade from neighbouring countries. These measures are likely to improve economic conditions and ensure a gradual rise in disposable income (5.2% CAGR between 2020 and 2024), further driving customer spending on discretionary and sports activities (6.2% CAGR between 2020 and 2024).

Chart 3: Disposable Income Per Capita (QAR 000's)



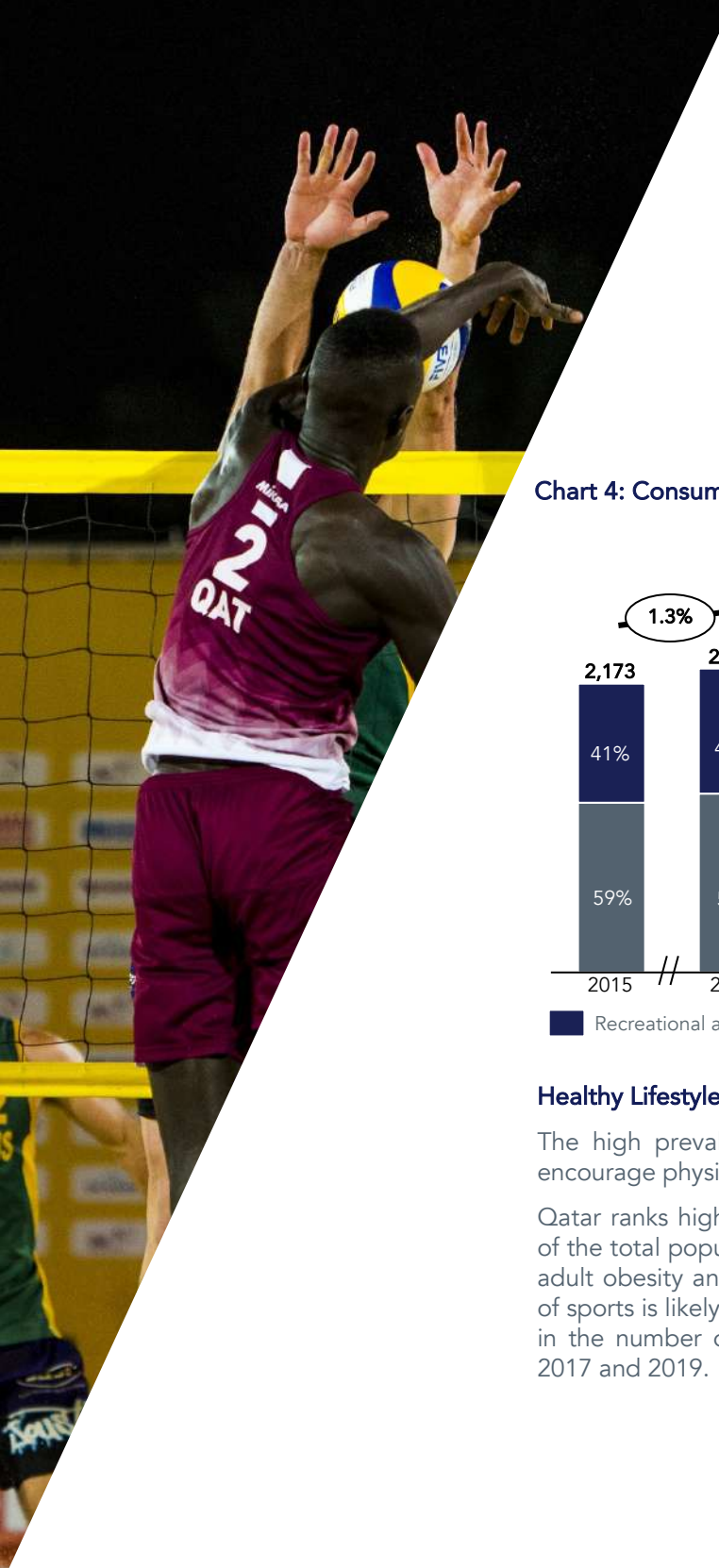
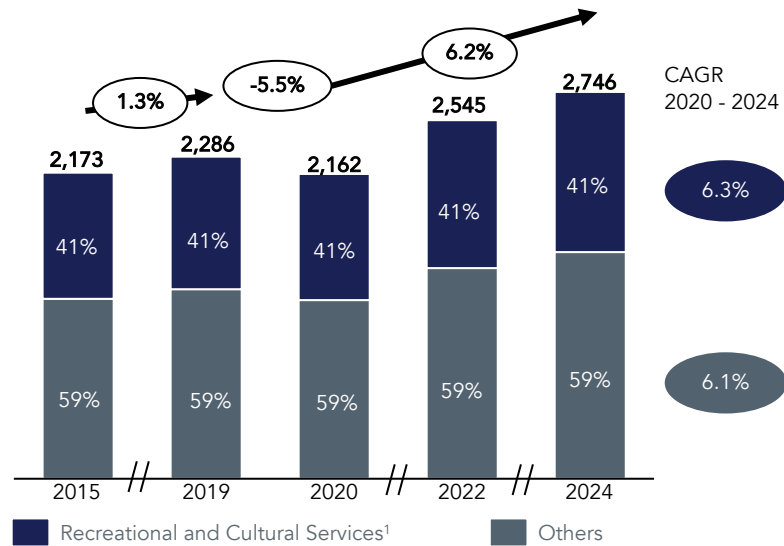


Chart 4: Consumer Expenditure on Leisure and Recreation Per Capita (QAR)



Healthy Lifestyle Awareness [**↑ Positive Impact**]

The high prevalence of lifestyle diseases in Qatar is expected to further encourage physical activity and drive demand for sports services.

Qatar ranks higher than the global average when measuring the proportion of the total population affected by non-communicable diseases like diabetes, adult obesity and raised blood pressure. Growing awareness of the benefits of sports is likely to incentivise physical activity, as seen in the steady increase in the number of sports practitioners and athletes in the country between 2017 and 2019.



Chart 5: NCD Prevalence (% of Total Population)

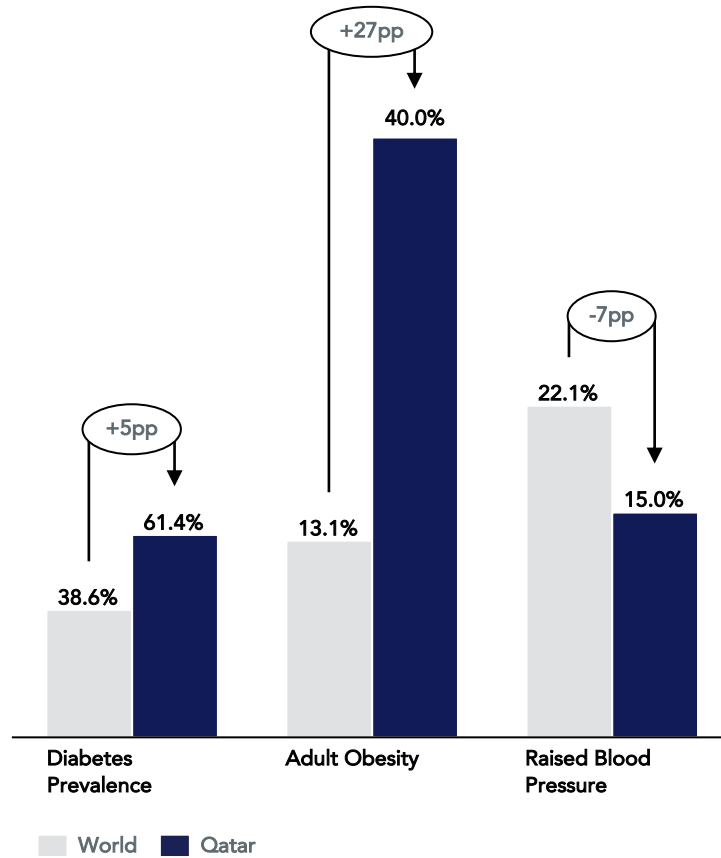


Chart 6: Monthly Average of Sport Practitioners at Ferjan Playgrounds in Qatar

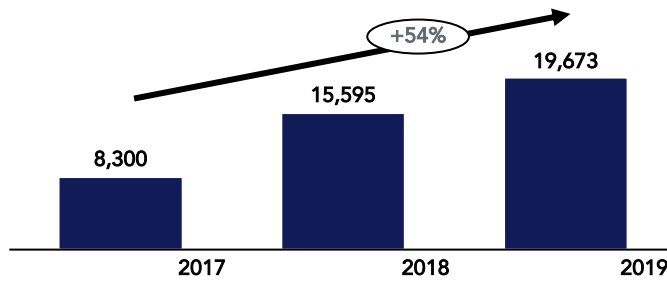
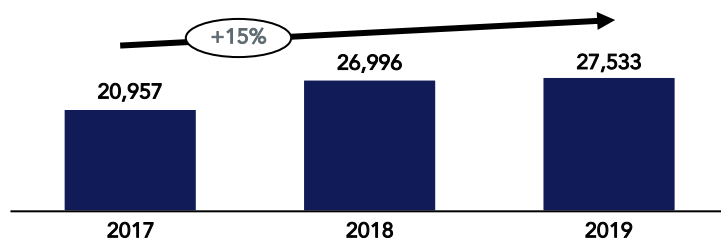


Chart 7: Athletes Registered with Sports Federation in Qatar





Sporting Events [↑ Positive impact]

Qatar is aiming to become a global sports hub with five upcoming international events over the next eight years.

The Qatar Government is investing in the sports industry as a means to diversify the economy and promote positive social change. The increase in the number of international events hosted in the country (eight over the next decade) is expected to play a key role in the development of the sector.

Figure 2: International Sport Events Hosted in Qatar

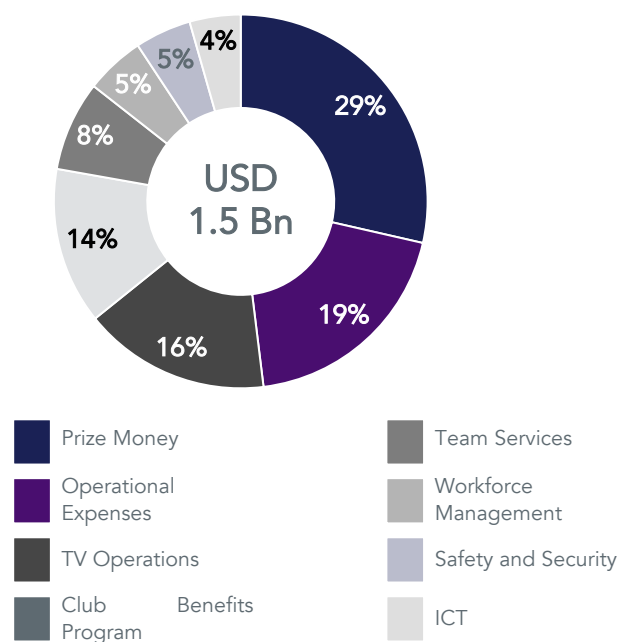


The 2022 FIFA World Cup is one of the biggest sporting events in the world and is expected to bring in over a million spectators to Qatar. With a budget of over 8 billion USD, and stretching over nearly a month, the tournament should provide a huge boost to the sports and events industries in the region while also empowering the local youth.

Figure 3: 2022 FIFA World Cup Qatar Facts and Figures



Chart 8: 2022 FIFA World Cup Qatar Investment Budget



¹Excluding ~ USD 6 bn budget allocated to construction
 Source: FIFA World Cup Qatar 2022 Sustainability Strategy

GLOBAL TRENDS AND THEIR REGIONAL ADOPTION



In recent years, the sports industry has gone through major changes, both due to rapid technological progress and greater emphasis on diversity. With the pandemic acting as a deterrent to live events, digital platforms and new sports media like eSports have become even more significant. Qatar's sports sector has also been evolving to cater to these global trends.

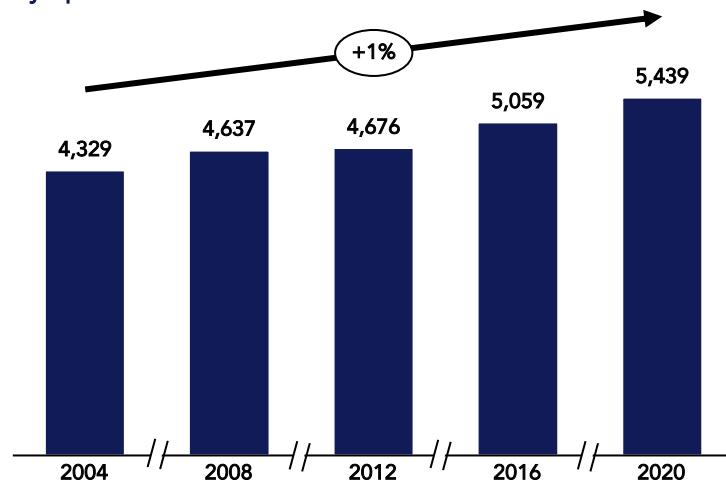
1. Increasing Participation of Women

The participation of women in the sports industry has been increasing at a steady rate over the years; and with women representing ~70-80% of the consumer market, global initiatives on diversity and inclusion seeks to further bolster that trend.

Global Adoption

- The number of women athletes participating in the Olympics has climbed up from 4,329 in 2004 to 5,439 in 2020, spurred on by an increase in both audience and sponsorship. The 2022 Winter Olympics will introduce two new sports for women: monobob and big air freestyle skiing.

Chart 9: International Number of Female Athletes in the Olympic Games

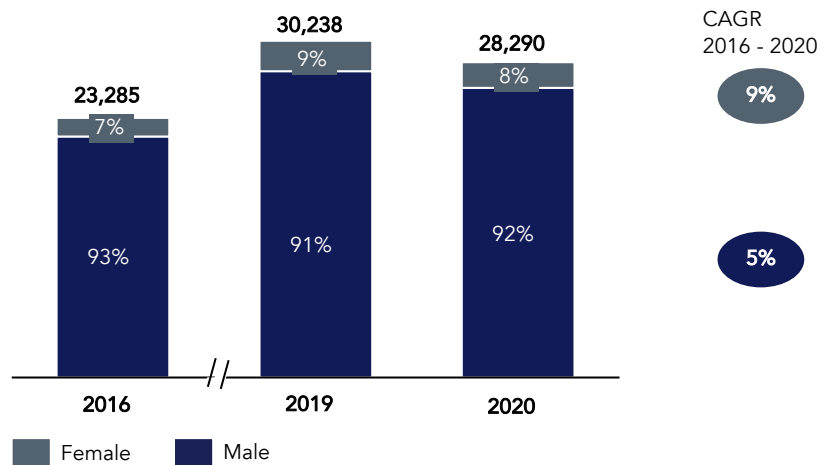


Regional Adoption

- The Arab Women Sports Tournament held in **Sharjah** in February 2020 witnessed a record number of participants, with 78 clubs from 18 Arab countries taking part.
- The number of women athletes registered in sports federations across **Qatar** has continued to grow at 9% CAGR during 2016-2020 and is expected to keep rising in the years to come. Qatar saw their first female debut in the Olympics in 2012. Noor Al-Malki, a sprinter, became one of the first women to represent the country at the Olympic Games.



Chart 10: Number of Athletes Registered in Sports Federations in Qatar by Gender



2. Emergence of eSports

One of the most impactful changes in the sports industry over the last few years has been the rapid emergence of eSports.

Global Adoption

- In fact, the global eSports market is valued at ~US\$1.1 billion today, with ~767 million viewers. The market is expected to grow at 13.3% CAGR during 2020-2023, reaching ~US\$1.6 billion with ~998 million viewers.

Chart 11: Global eSport Market Size (USD Bn)

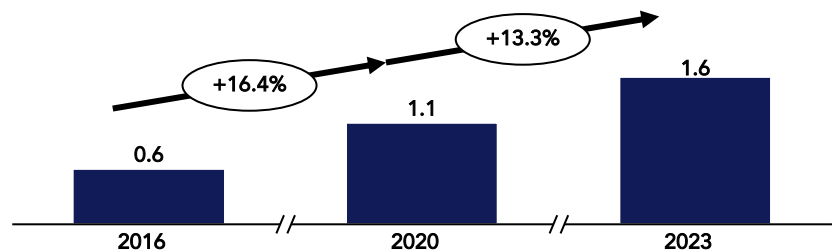
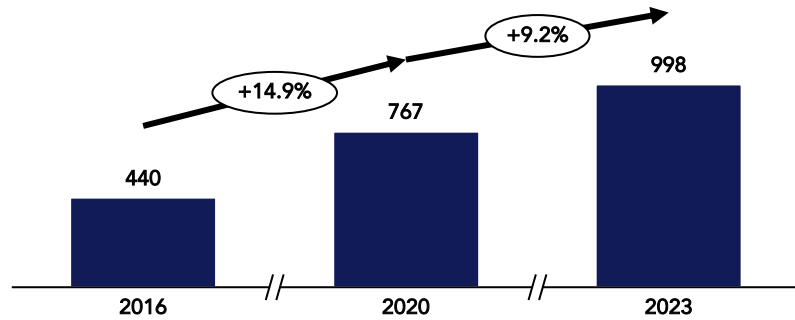




Chart 12: Global eSport Audience Size



Cloud gaming and the rise in 5G adoption are expected to boost the industry, especially as it branches out to other areas of revenue generation in the form of media rights, sponsorships, advertising and so on. Smartphone gaming will continue to dominate this field, and apps and social media integrations will maximise audience engagement while creating more opportunities for monetisation.

Figure 4: Key Esports Related Trends and Growth Drivers

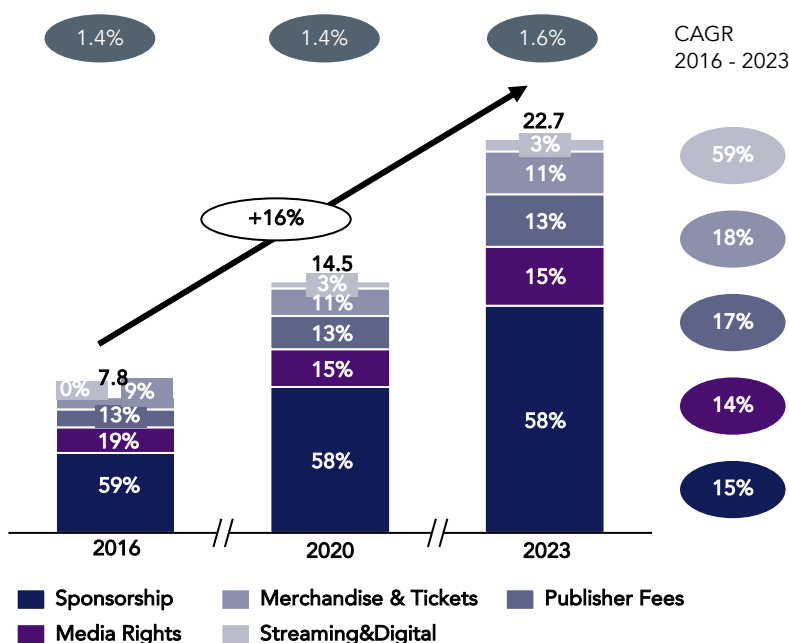
	Dominance of smartphone-centric gaming
	Focus on media rights, advertising and sponsorships for e-Sport events
	Role of in-app engagement to boost revenues
	Intersection of gaming and social media to bring in a wider audience
	Influence of technological 5G adoption on gaming
	Cloud gaming as a revolutionary tool



Regional Adoption

- MENA contributes to ~2% of the global eSports market, presenting tremendous potential for growth, particularly as viewership is expected to almost double by 2023. During this period, the local market is projected to grow rapidly to reach US\$23 million, with sponsorships as the major driver (~60% of the market).

Chart 13: MENA eSports Market Size (USD Mn)



There are several examples of initiatives to promote and develop eSports in the Middle East.

Saudi Arabia has launched an official government representation for competitive gaming and eSports, named the Saudi Arabian Federation for Electronic and Intellectual Sports.

In the **UAE**, the Dubai Sport Council has been actively supporting eSports events, such as the Girlgamer World Finales tournament – an initiative put together in part by 10X Media, a government entity.

Jordan recently launched 'Gaming Lab', an initiative supported by King Abdullah II to elevate the gaming sector as a fast-growing and promising industry.

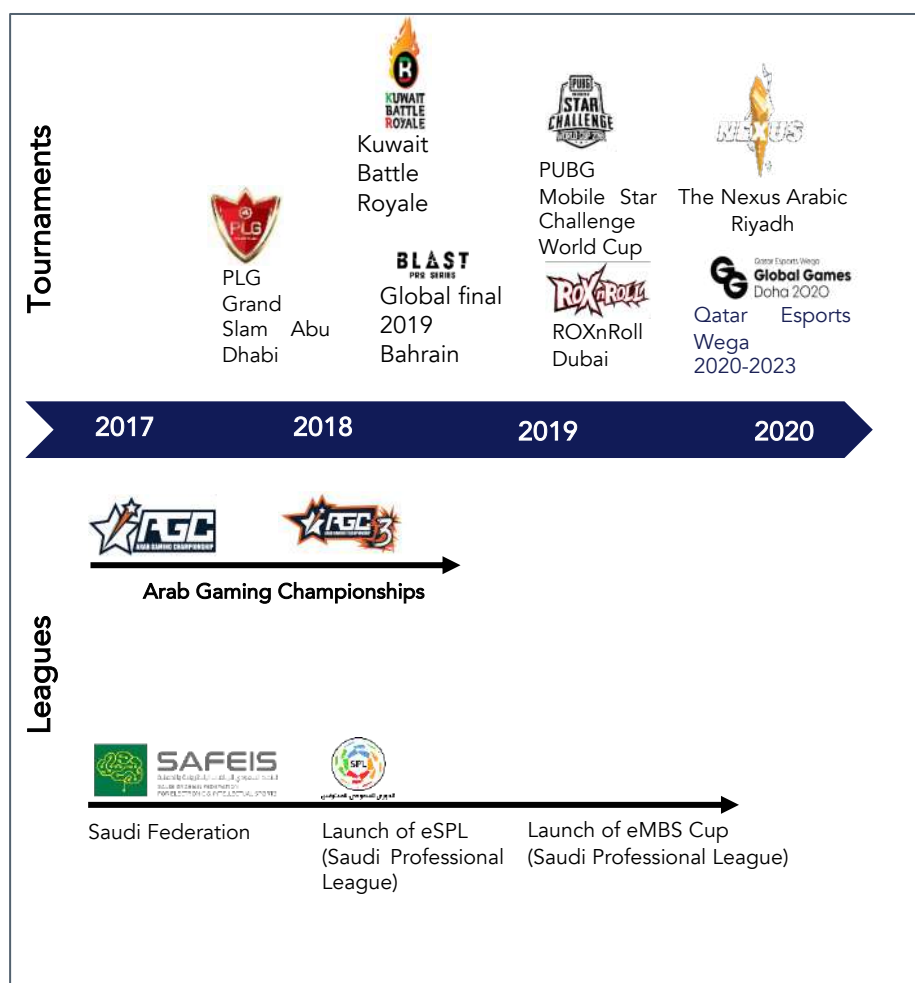
The Government of **Bahrain** has also taken steps to accelerate the growth of eSports by partnering with BLAST Pro Series, under a special public-private partnership to host the final of their CS: GO tournament.



Qatar, too, has been quick to identify key areas of growth in their eSports market and host tournaments and leagues with increasing regularity. One of the most important is the Qatar eSports Wega Global Games, which the country will host over three years. The competition’s organisers include the Aspire Zone Foundation in partnership with Wega, a leading global payment solution developed by Truxtun Capital.

Virtuocity, the region’s first digital gaming capital, partnered with Qatar Tourism Authority for its ‘Summer in Qatar’ programme in 2019 and hosted a Gaming Festival focused on digital gaming experiences. Virtuocity also signed an agreement with Qatar’s top eSports star Ahmed Al Meghessib to develop local talents and popularise eSports in the region. Currently, Virtuosity is exploring the possibility of incorporating eSports into the school curricula to enhance kids’ performance.

Figure 5: Regional Leagues & Tournaments





3. New Technology in Sports Coaching

The sports coaching market is also being reshaped by technology. It is becoming common practice to integrate virtual training and advanced tracking and analytics to step up an athlete's performance.

Global Adoption

- The **US** has been at the forefront of developing training apps. The ECOACH and Famer apps connect amateurs with professional coaches virtually. The Nike Training Club (NTC) app provides 185+ free workouts. The Strivr app provides athletes with the opportunity to train in any condition, at any time, with a full immersive experience. The HomeCourt app utilises artificial intelligence to record and track basketball shots, makes, misses and location.
- Rezzil is a post-match analysis tool, from the **UK**, to connect multiple data platforms for replaying and analysing athletes' performances.

Regional Adoption

- **Qatar** has been exploring the possibility of investing in accelerators and incubators to upskill athletes using new technology as well. Qatar's Evolution Sports Virtual Live Team Training programme allows individuals and small groups to train via Zoom with coaches. These sessions focus on technical skills that athletes can develop in limited space with basic equipment.

4. Enhanced Viewing Experience

As closed-door games and events with limited audience size became the norm during the recovery from COVID 19, technological intervention helped recreate the stadium atmosphere for both viewers at home and in-stadium spectators, with the use of virtual reality, artificial crowd noises, lifelike cut-outs to replace spectators and so on.

Global Adoption

- Online spectators:
 - North America's National Basketball Association (NBA) broadcasts in 2020 included virtual fans in the arena.
 - Recently acquired by Apple, NextVR is one of the leaders in broadcasting live events in virtual reality. It has partnered with the biggest leagues and broadcasters to deliver exclusive virtual reality events, such as NBA matches.
- Physical spectators:
 - In a bid to actively engage fans on match day, drive-in viewing in stadium parking, technology-enabled stadiums are being extended to attendees. Fans are also being given the opportunity to take part in the man-of-the-match voting and other live decisions in the stadium.
 - American professional baseball team, the Boston Red Sox recently opened virtual reality stands that allow fans to follow the match and see the field from a player's perspective.



Regional Adoption

- beIN sports launched 'connect' in Qatar, which is an immersive virtual reality experience that helps fans watch live games from their homes while also enjoying the in-stadium feel.

5. Fan Engagement

Modern sports teams often go beyond the traditional medium to interact with fans. Apps and social media platforms allow for a much broader audience and turn clubs into global entities, overcoming geographical limitations.

Global Adoption

- English professional football club Manchester United's social media dashboard is a good example of this, as it incorporates all of their social media activity into one page and is available in six different languages.
- Athletes, too, have turned into influencers using their social media pages, creating a more personalised experience for enthusiasts, who can keep up with the latest news about their favourite players even beyond live games.
- In this respect, Intel's 3D Athlete Tracking (3DAT) takes fan-player interactions to a whole new level. It is a first-of-its-kind computer vision solution that uses artificial intelligence to enhance the viewing experience for Olympic fans, with near real-time insights and overlay visualisations during events.
- Fantasy games are another rising offshoot of the traditional sports market. These apps allow fans and sport enthusiasts to serve as general manager of a virtual professional sport team of their choice. They can emulate the feeling of leading an actual team, by creating rosters, participating in drafts, gathering points and competing against other users.

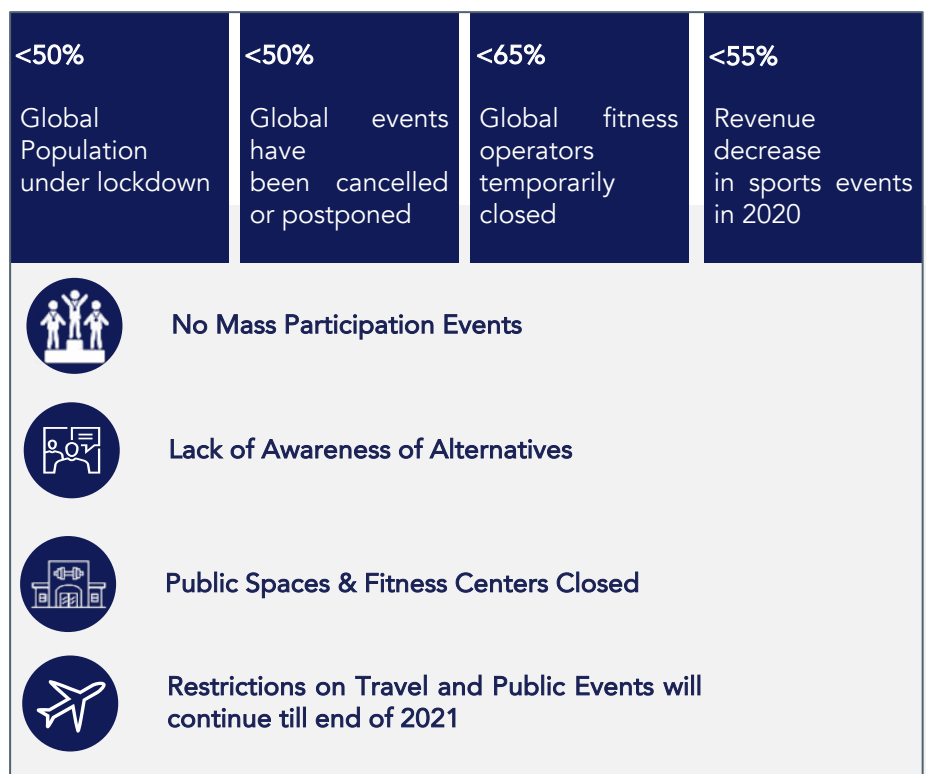
Regional Adoption

- **Qatar** has its own share of such fantasy games. For instance, Vodafone Qatar introduced new games to enhance fan engagement on digital and social media platforms. These include 'Predict & Win' (where players guess match results on a daily basis and in real time) and 'Qatar's Greatest Fan' (a series of daily quizzes and trivia to celebrate the fans' knowledge about Arabian Gulf Cup history).

COVID-19 IMPACT

COVID-19 brought unprecedented socio-economic disruptions into the world, and the sudden requirement for home confinement had severe impacts on all industries that relied on live interaction, sports being no exception.

Figure 6: Worldwide Impact of Covid-19



With almost half of all global sports events cancelled, reducing revenues by over 50%, the sports industry had to reinvent itself to survive through this period. The rise of virtual sports provided some reprieve to the sector; and digitalised fan engagement succeeded in keeping followers interested even in the absence of live events.

In the short run, the market for physical sports will gradually find its way back to pre-pandemic levels, as travel restrictions remain nebulous and continue to hamper the mobility of spectators and players alike. In the long term, however, the push towards digitalisation and the full integration of eSports into the industry holds great promise. This transformation, while brought about by exigencies, is expected to leave a positive impact on sports in the future.

SWOT ANALYSIS



Figure 7: SWOT Analysis



STRENGTHS

- Best-in class infrastructure supported by high government expenditure
- One of the leading global sports hub (Aspire Zone)
- Leading sports broadcasters (beIN, Al Kass)
- Specialised sports incubator (QST)
- Established sport administration framework to bid and stage successful events



WEAKNESS

- Limited local scalability due to small population
- Relativity low youth sports participation
- Lack of direct funding to support private sector participation beside accelerator program



OPPORTUNITIES

- Hosting international sports events (FIFA 2022, Asian Games 2030) will provide the opportunity for local companies to flourish
- Leveraging new technology solutions in Sports (e.g. fan engagement, coaching, viewing experience)
- Potential to develop a regional / international hub for eSports in Qatar as the market is still at an early stage of development



THREATS

- Unfavourable weather conditions for sports events during summer months
- Increasing investment of regional countries (KSA, UAE) in the sports sector is likely going to increase the level of competition in hosting international events



CONCLUSION

Qatar's growing presence in the sports industry has been a result of careful planning by the nation's government alongside other key stakeholders. The country possesses the infrastructure to hold major global events and has the potential to house a blooming sports market.

eSports remains an area of growth for Qatar, and the use of the virtual sphere is being extended to spectator sports as well to improve fan engagement on match and non-match days. A largely young population and the rise in awareness about the health benefits of exercise also bodes well for the future of physical sports in the region. At the same time, the participation of women in sports federations has been increasing in Qatar; the country's women's sports ecosystem presents room for improvement.

Qatar aspires to diversify its national income by investing in sports. The development roadmap put forward by the QNV 2030 will not only attract foreign capital and reinforce the economy, but also establish the country as a true global force in the field of sports.

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About Qatar Development Bank

Qatar Development Bank (QDB) was founded by Emiri Decree to grow Qatar's private sector and diversify its economy. His Highness Sheikh Hamad Bin Khalifa Al Thani, the Father Amir, identified these as vital tasks in developing Qatar into a modern state. Since its establishment in 1997, QDB has been at the forefront of these efforts. It has worked with thousands of Qatari entrepreneurs and enterprises and has provided investment and guidance to brand-new start-ups and well-established corporations. QDB has built a reputation for identifying promising investment opportunities. Its focus is on growing SMEs in key sectors by offering several services via a single window to support expected growth. Through smart, targeted financing products and advisory support services, QDB is nurturing a sound and sustainable knowledge-based economy for Qatar.

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