FIFA World Cup fever in the Middle East

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OBJECTIVE

Understanding the sentiment and viewership behavior among Middle Eastern consumers around the 2022 FIFA World Cup, taking place in Qatar this year.

TARGET AUDIENCE

- Males & females
- 18+ years old
- All nationalities
- Those who follow FIFA World Cup

METHODOLOGY

Online quantitative surveys through a structured questionnaire.

Fieldwork period: 8th–12th November 2022

SAMPLE SIZE

- MEA Region – 1200 interviews
- UAE – 441 interviews
- KSA – 420 interviews
- Qatar – 339 interviews
Football Fans in the Middle East expressed a great level of excitement & happiness about World Cup happening in Qatar. They find the upcoming edition more appealing vis-à-vis the previous one in Russia.
Q7. Considering that normally FIFA World Cup is held in summer, what do you think about this year’s event starting in November?

The followers are **thrilled** that FIFA World Cup is happening at this time of the year, as it coincides with the **pleasant weather conditions** in the region.

- **Saudi Arabian Fans**: 86%
- **UAE Fans**: 86%
- **Qatari Fans**: 91%

(I think it’s good, I like that it is happening at this time of the year)
93% of the football fans are of the opinion that that FIFA World Cup taking place in Qatar will **promote football as a sport** in the Middle East region.

- **Saudi Arabian Fans**: 92%
- **UAE Fans**: 93%
- **Qatari Fans**: 94%

'C7. Do you think that FIFA world cup taking place in Qatar will promote 'football as a sport' in the Middle East?
Apart from the local teams, Brazil and Argentina seem to have the highest fan following among the Middle Eastern population for 2022 FIFA World Cup.

Main teams Middle Easterns will follow in 2022 FIFA World Cup Qatar

Saudi Arabian Fans
- KSA
- Brazil
- Argentina
- Spain
- Qatar

UAE Fans
- Brazil
- Argentina
- Qatar
- Germany
- England

Qatari Fans
- Qatar
- Brazil
- Argentina
- Portugal
- Spain
Football enthusiasts are most likely to watch the 2022 FIFA World Cup matches at...

1. Outdoor Match Screenings
2. Home (self or friend's)
3. Cafes/restaurants

Q8. Where will you watch the 2022 FIFA World Cup?

3 in 5 Qatari fans claim to watch 2022 FIFA World Cup matches at stadium.
A large majority of football fans are planning to watch full matches on TV. 70% of them claim to watch more matches than previous World Cups, making TV a compelling advertising platform for brands.
Rising cost of living is likely to somewhat influence the spending on place and food & beverage consumption of while engaging with the tournament.

INFLATION IMPACT on choice of place for match viewership
- Saudi Arabian Fans: 32%
- UAE Fans: 30%
- Qatari Fans: 34%

INFLATION IMPACT on food & beverages consumption while watching matches
- Saudi Arabian Fans: 31%
- UAE Fans: 31%
- Qatari Fans: 34%

Q9. Do you think that 'inflation (cost of living crisis)' will affect your choices regarding where you will be watching the 2022 FIFA World Cup?
Q15. Do you expect the 'inflation (cost of living crisis)' to affect your consumption of food and drinks while watching the matches either at home or out?
However, about two-thirds of the football fans plan to spend more or same than the previous World Cups’ on socializing / going out while watching the matches.

Expected spending behaviour on Socializing / Going out while watching 2022 FIFA World Cup

<table>
<thead>
<tr>
<th></th>
<th>Saudi Arabian Fans</th>
<th>UAE Fans</th>
<th>Qatari Fans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan to spend more than previous World Cups</td>
<td>45%</td>
<td>42%</td>
<td>54%</td>
</tr>
<tr>
<td>Plan to spend the same like previous World Cups</td>
<td>20%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Plan to spend less than previous World Cups</td>
<td>14%</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Q12. Thinking about your spending habits and considering previous World Cups, which of the following statements is applicable to you, when it comes to spending while going out/socializing with family and friends while watching this World Cup?
High level of engagement with the upcoming FIFA World Cup has been observed in Middle East, as fans are familiar with many sponsors of the event.

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qatar Airways</td>
<td>76%</td>
</tr>
<tr>
<td>Coca-Cola</td>
<td>62%</td>
</tr>
<tr>
<td>Visa</td>
<td>60%</td>
</tr>
<tr>
<td>Adidas</td>
<td>58%</td>
</tr>
<tr>
<td>McDonald's</td>
<td>45%</td>
</tr>
<tr>
<td>Hyundai</td>
<td>36%</td>
</tr>
<tr>
<td>Kia</td>
<td>30%</td>
</tr>
</tbody>
</table>

C1. Which of the following brands would you say are sponsors of the 2022 FIFA World Cup?
Further, a majority of football fans are aware that Qatar aims to be the first country to host a carbon neutral FIFA World Cup event. Interestingly, most of them believe that Qatar will be ‘successful’ in doing so!

<table>
<thead>
<tr>
<th>Country</th>
<th>Awareness</th>
<th>Credibility &amp; Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi Arabian Fans</td>
<td>65%</td>
<td>86%</td>
</tr>
<tr>
<td>UAE Fans</td>
<td>71%</td>
<td>82%</td>
</tr>
<tr>
<td>Qatari Fans</td>
<td>83%</td>
<td>88%</td>
</tr>
</tbody>
</table>

Top 2 Box Scores
(Totally Credible + Quite Credible)
(Extremely Important + Quite Important)
KEY TAKEAWAYS...

Football fans are eagerly looking forward to 2022 FIFA World Cup and their excitement is amplified as the competition will be played in the Arab world for the first time!

Fans are confident that World Cup being organized in the Middle East will promote football as a sport in the region.

82% of football enthusiasts are planning to watch ‘full matches’ on TV and 7 in 10 of them intend to watch ‘more matches than previous World Cups’. Thereby, advertising on TV can potentially fetch higher ROIs to brands.

Though a section of football followers expressed their concern about the rising cost of living, it doesn’t seem to suppress their passion for the game as two-thirds plan to spend more or same than the previous World Cups.

59% of the football fans find Qatar’s claim of hosting a carbon neutral football tournament ‘totally credible’. In fact, they love the idea that this edition is going to be carbon neutral as sustainability is of immense importance to them.
May the best team win!!!
Contact our Commercial Team

Georges Akkaoui
Enterprise Account Director - MEA
georges.akkaoui@toluna.com

Maria Padmanabhan
Business Development Manager - MEA
maria.padmanabhan@toluna.com