

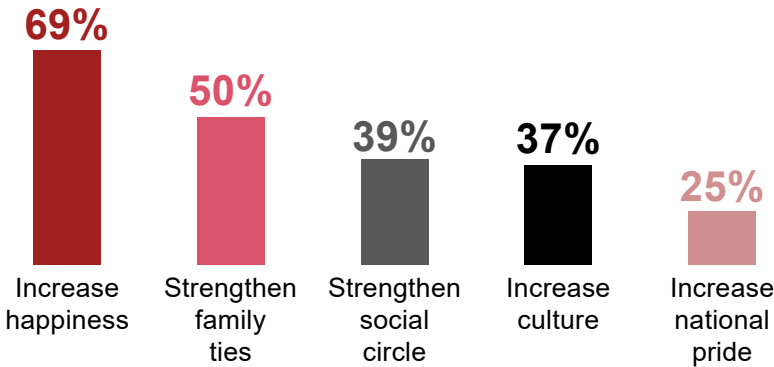
It's showtime!

LEISURE AND ENTERTAINMENT IN THE GCC

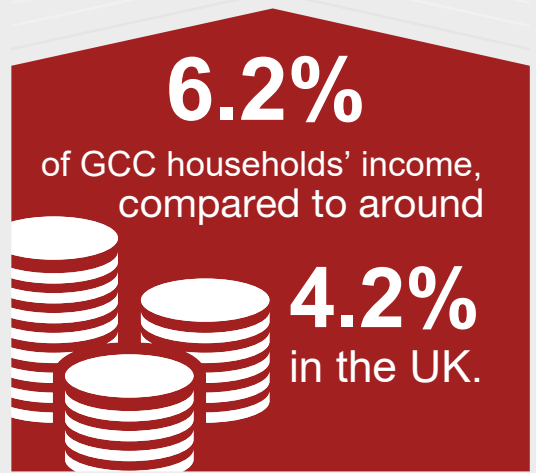
Gulf Cooperation Council (GCC)¹ citizens and residents value L&E and believe it increases their happiness and improves their lifestyle.

>25% of respondents want their country to primarily be a destination of entertainment and culture.

Perceived benefits of L&E
(in % of respondents, 2018)



This means higher spending on L&E among GCC households in 2018



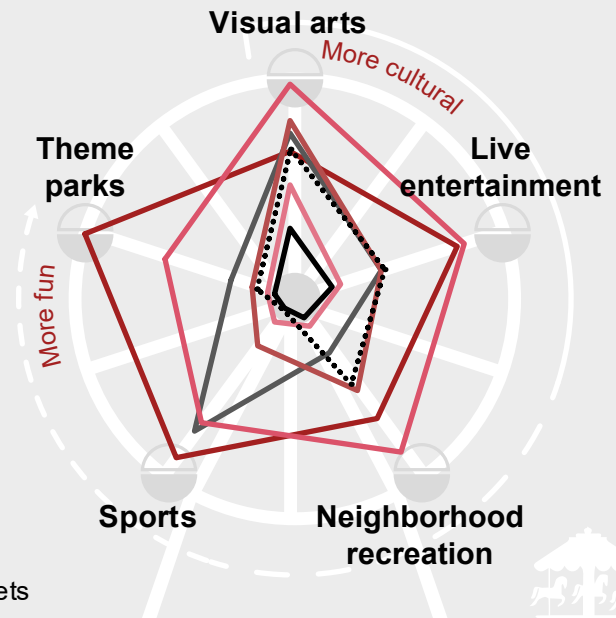
Most GCC governments are taking action and are investing heavily in developing the L&E sector



Most countries are doubling their focus on culture and arts offerings as opposed to casual entertainment and parks

Normalized supply of L&E offerings across the GCC (per capita, 2018)

- UAE
- Saudi Arabia
- Qatar
- Bahrain
- Kuwait
- Oman
- Saudi Vision 2030 targets



¹ GCC countries are Bahrain, Kuwait, Qatar, Oman, Saudi Arabia, and the United Arab Emirates.

How can GCC countries get the most from their L&E investments?

GCC consumers prefer fun activities as compared to more-cultural offerings.

Average engagement of GCC respondents in L&E (2018)



Given the supply of L&E offerings and demand from citizens and residents, there are three opportunities for GCC governments.



Increase sensibility of citizens to arts and culture

...

by making offerings more accessible, attractive, modern, and engaging



Focus on neighborhood based offerings

...

by prioritizing family entertainment centers as they are highly profitable and outdoor urban parks



Invest more in theme parks in Saudi Arabia only

...

as its market is large enough to sustain the large and complex investment that is requires

The result could be **US\$3.4 billion** additional L&E spending in the GCC annually

Potential increase in L&E spending (US\$ billions, 2019)

