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IDEATION CENTER INSIGHT

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**Leisure and entertainment
in the GCC**

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The Ideation Center

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EXECUTIVE SUMMARY

The Gulf Cooperation Council (GCC)¹ countries are investing significantly to develop their leisure and entertainment (L&E) sectors in order to improve quality of life, celebrate national identities, and diversify national economies. They can increase the impact of their investments by understanding and addressing the expectations and spending patterns of GCC consumers, who value L&E offerings and spend a larger share of their monthly income on these compared to consumers in other regions. To get the most from their L&E initiatives, GCC governments should prioritize investments to match the specific needs of the sector's consumers. By doing so, they can accelerate improvements in quality of life and well-being, increase national pride, and generate an estimated US\$3.4 billion annually in increased L&E spending GCC-wide.

The Ideation Center recently examined each GCC country's national ambitions and current L&E offerings. We also conducted a survey of 1,200 respondents, to understand consumers' current consumption levels and preferences. Based on that analysis, we identified three priorities for GCC governments:

First, they should increase people's sensibility to arts and culture and make L&E offerings more accessible and engaging, and better integrated into people's daily lives.

Second, they should focus more on building accessible, community-based recreational offerings for families, such as urban parks, family entertainment centers, and a rich calendar of neighborhood events and fairs.

Third, GCC governments should judiciously respond to their citizens' demand for theme parks, given the considerable utilization required to make these large investments profitable.

L&E IS CRITICAL FOR A HIGH QUALITY OF LIFE IN THE GCC

L&E activities positively affect a society's well-being in many ways. Engaging in locally relevant cultural and arts activities fosters citizens' pride in their country and national identity. Participating in recreational events at the neighborhood level boosts citizens' engagement with their community, affirming a sense of belonging among diverse groups of people. These sentiments underscore people's perception that their quality of life is high. Moreover, L&E is vital to diversifying the economic base of the GCC and generating more jobs. All of these factors have led GCC governments to increase their investments in the L&E sector.

Saudi Arabia, for instance, is investing significantly and introducing major changes with the aim of building a thriving L&E sector and a comprehensive offering across segments. L&E is a central pillar of Saudi Vision 2030, the national development program, and its quality of life program. The objective is to improve the well-being of people in the country, boost the economy by creating jobs, and increase household spending in the domestic L&E market. As part of this effort, the government has created new entities such as the ministry of culture, the General Entertainment Authority, and the General Sport Authority. In addition, it will soon be announcing 11 more culture subsector bodies that will represent areas such as visual arts, performing arts, film, and music.

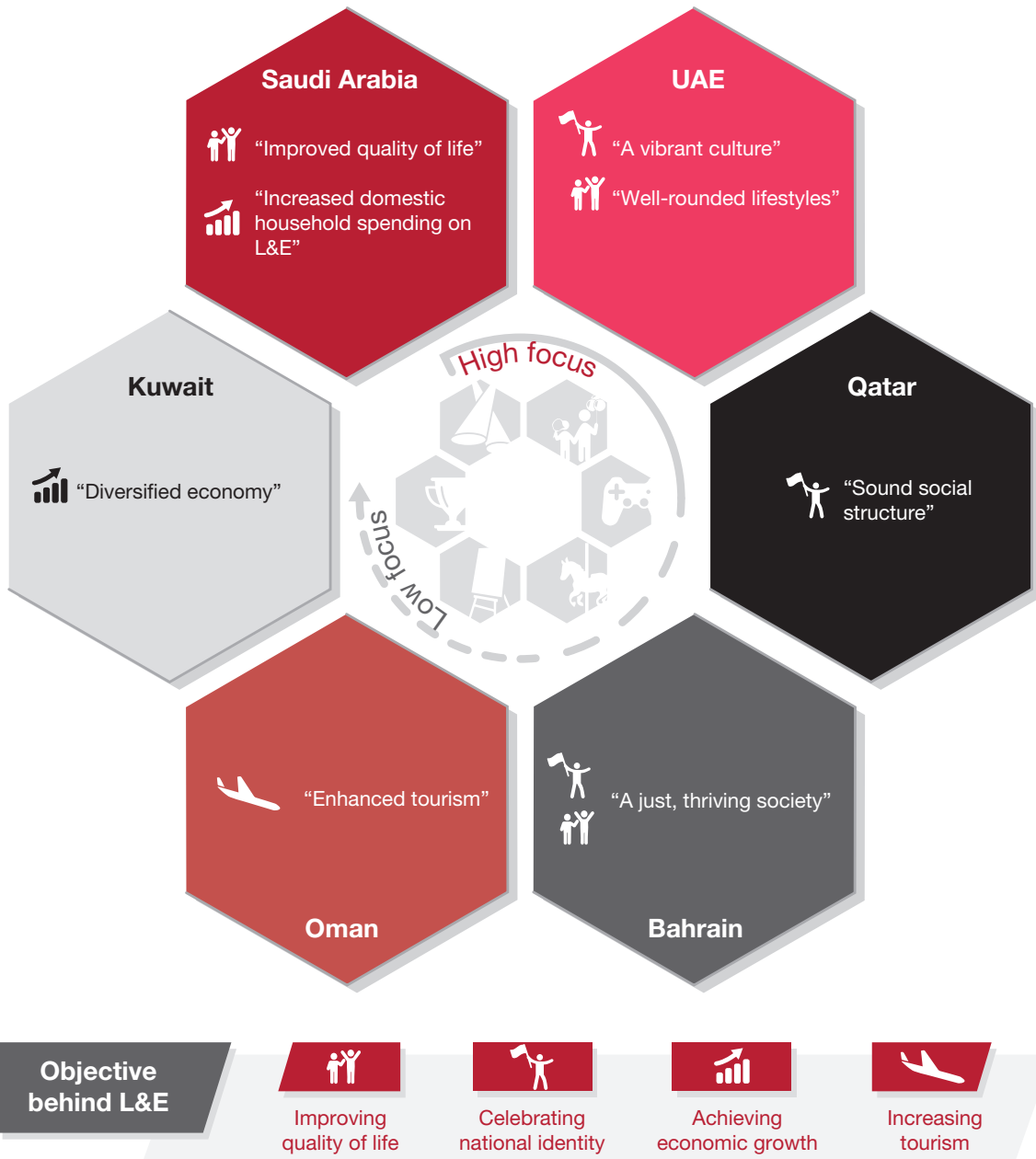
Saudi Arabia has opened several cinemas and now hosts international concerts and festivals. It continuously promotes neighborhood entertainment events and activities through its "Enjoy Saudi" platform ("3eeshha" in Arabic). The country is developing mega projects that include a major focus on entertainment and culture, such as Al Qiddiyah Entertainment City. Entertainment is also a key pillar of NEOM, the massive planned development project in northwest Saudi Arabia.

Qatar, the United Arab Emirates (UAE), and, to a lesser extent, Bahrain all include L&E in their national visions and plans, with a primary focus on celebrating culture, heritage, and national values by investing and promoting their arts and culture ecosystem (see *Exhibit 1, page 4*). Kuwait and Oman mainly consider the economic impact of these activities, albeit indirectly.

EXHIBIT 1

GCC plans feature L&E at various levels

Primary objectives behind L&E in GCC development plans



Note: UAE = United Arab Emirates.

Source: Saudi Vision 2030; UAE vision 2021; Qatar vision 2030; Bahrain 2030; Oman's Five-Year Development Plan (2016-2020); New Kuwait 2035; Strategy& analysis

Defining the L&E industry

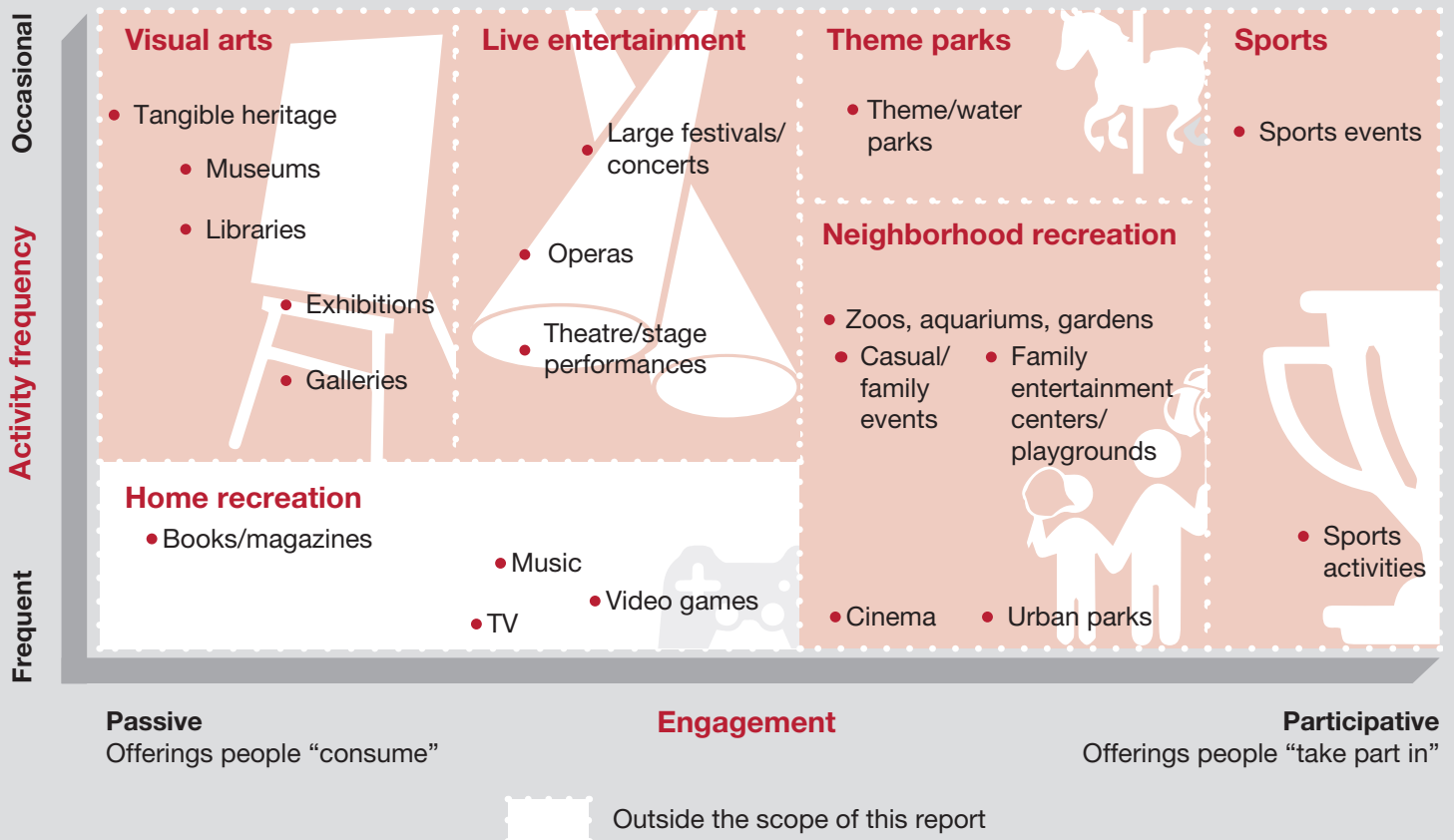
We define the L&E industry as comprising six categories of activities: home recreation, visual arts, live entertainment, neighborhood recreation, theme parks, and sports. We

further segment and map these categories along two dimensions: the level of engagement by the public, and the frequency of the activity (see *Exhibit 2*).

EXHIBIT 2

Mapping the L&E ecosystem

L&E ecosystem, by activity frequency and level of user engagement



GCC CONSUMERS VALUE L&E

Now is an opportune moment for GCC governments to ensure that L&E demand is in line with the scale of governments' investments and the nature of their offerings. Saudi Arabia is relaunching its L&E sector and all GCC governments are currently investing on a significant scale. To understand what the public is looking for, we surveyed 1,200 consumers in the six GCC countries, and included nationals, as well as Arab, South Asian, and Western expatriates. They provided their views of L&E in the region, including spending levels and areas in which they would welcome additional offerings.

A central finding from our analysis is that GCC citizens and residents place a premium on access to L&E options. Two-thirds of respondents see L&E as a "must" for quality of life and prosperity. When asked what they would like their country to be known for, respondents choose becoming a destination for entertainment and culture as the second most popular option after economic growth.

Moreover, respondents see value in improving the quality and selection of L&E offerings. Among the primary benefits they cite are a better lifestyle and increased happiness (69 percent of respondents), stronger family ties (50 percent of respondents), and stronger social connections (39 percent of respondents).

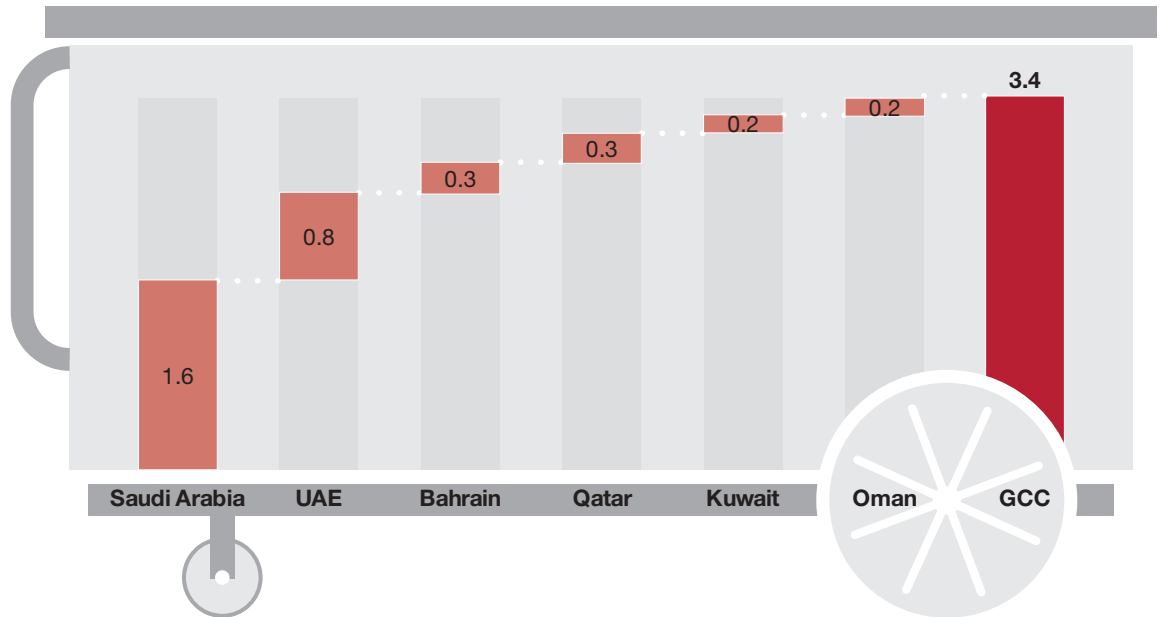
There is also an economic prize to be claimed for making such improvements. GCC consumers have reported generous spending on L&E activities, and they are willing to spend more.² Overall, GCC consumers claim to spend an average of 6.2 percent of income on L&E. By comparison, the average household in the U.K. spent around 4.2 percent of its income on the same L&E categories in 2018, according to government reporting.³ In our view, one of the key reasons behind that higher spend could come from the greater disposable income of GCC citizens, compared to U.K. citizens, thanks to higher salaries, the absence of income taxes, and more-generous social services such as government pensions.

Perhaps most significantly, more than 78 percent of respondents say they are willing to increase their spending on L&E if the offerings were more aligned with their needs. Based on consumers' self-reporting, an improvement in L&E offerings could potentially lead to an increase in spending by up to \$3.4 billion a year across the GCC (see *Exhibit 3*). This corresponds to an average increase in spending on L&E activities of 8.5 percent per household.

EXHIBIT 3

Based on GCC consumers' self-reporting, updating L&E offerings could potentially increase the market by up to \$3.4 billion

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



Note: UAE = United Arab Emirates.
Source: Strategy&



GCC citizens and residents place a premium on access to L&E options. Two-thirds of respondents see L&E as a “must” for quality of life and prosperity.

THE DEVELOPING L&E SECTOR IN THE GCC

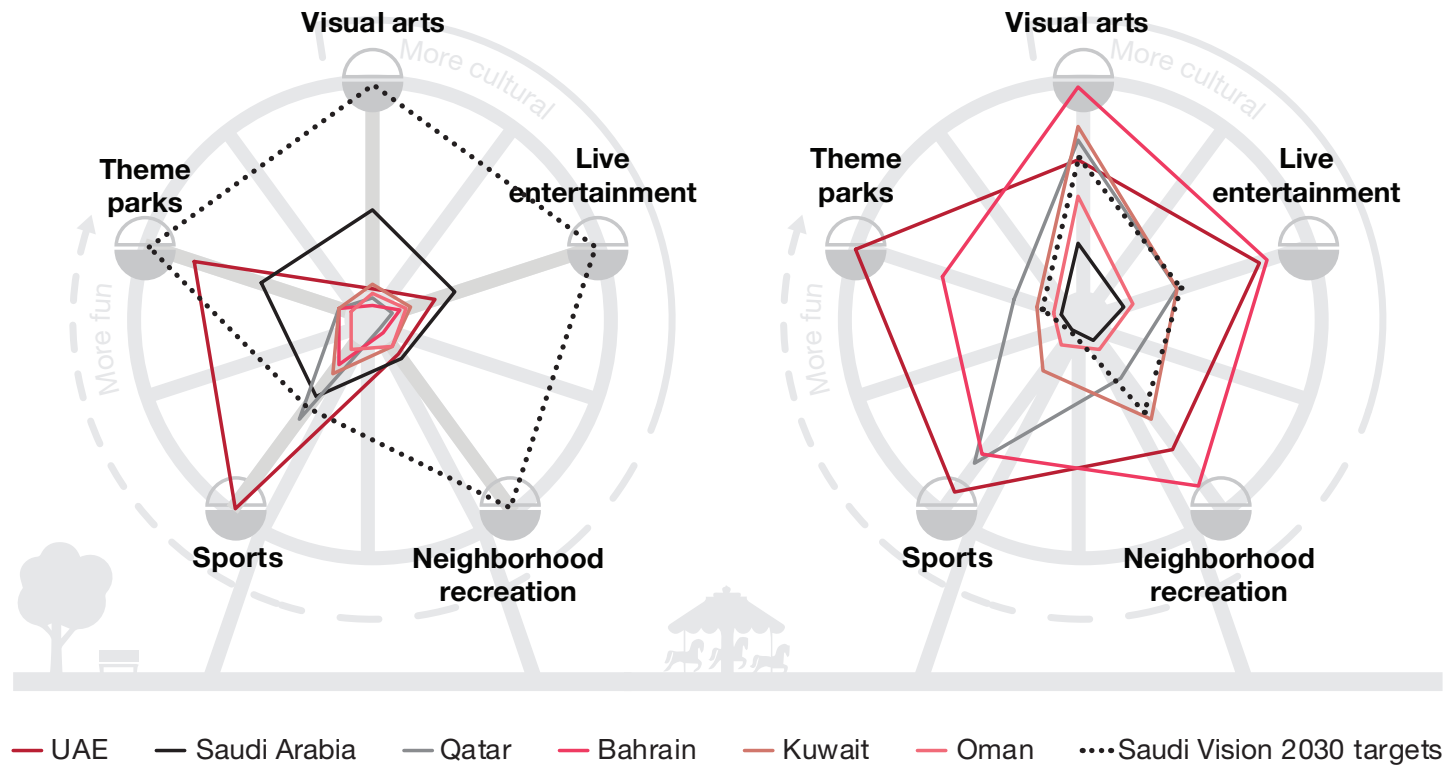
In parallel with building an understanding of the region’s demand for L&E, we conducted a comprehensive assessment of the current and planned supply of offerings across five main categories: visual arts, live entertainment, neighborhood recreation, sports, and theme parks (see “Defining the L&E industry,” page 5). We looked at both an absolute and a proportional supply of L&E offerings to understand the current value proposition of each GCC country in L&E (see Exhibit 4).

EXHIBIT 4

The UAE offers the most light L&E offerings, while Bahrain leads in cultural and neighborhood entertainment
Supply of L&E facilities across the GCC (2018)

NORMALIZED OFFERINGS IN ABSOLUTE TERMS

NORMALIZED OFFERINGS PER CAPITA








Note: UAE = United Arab Emirates.
Source: Strategy& analysis

A consistent theme in GCC countries' plans is their primary focus on further developing the visual arts and live entertainment scenes. This is particularly the case in the UAE, which already has a strong existing supply of recreational activities and theme parks. Saudi Arabia is also investing in all L&E offerings, from visual arts and live entertainment to large theme parks and flagship sports offerings (see *Exhibit 5*).

EXHIBIT 5

Saudi Arabia aims for comprehensive L&E offerings, while other countries mainly focus on the arts

L&E focus areas of GCC national plans (2019)

	 Visual arts	 Live entertainment	 Neighborhood recreation	 Sports	 Theme parks
Saudi Arabia	Art exhibitions Museums	Concert halls Theaters Shows and concerts	Family entertainment centers, zoos, gardens, "Enjoy Saudi Arabia" calendar, cinemas	Sports activities International tournaments Competitive sports	Iconic entertainment destinations Water parks Amusement parks
UAE	Museums Festivals/art exhibitions Libraries Heritage	Film festivals Music festivals/ concerts/operas	Green spaces Recreational activities	Competitive sports Sports facilities	Global distinctive entertainment outlets
Bahrain	Archaeological & Islamic sites Museums/art centers Book fairs	Culture/heritage and music festivals	Public spaces for families Neighborhood/ casual events	Sports activities	
Qatar	Museums/exhibitions Fine arts Poetry	Cultural festivals		Sports events Competitive sports Sports activities	
Oman	Nature and adventure Heritage sites		Calendar of recreational events		Iconic tourism projects
Kuwait	Cultural center (libraries)	Cultural center (theater, opera, concert halls, etc.)	Recreational and entertainment service centers		

Note: UAE = United Arab Emirates.

Source: Saudi Vision 2030, Quality of Life program, General Sport Authority, General Authority for Entertainment, and General Culture Authority programs; UAE Vision 2021, Dubai 2021, Abu Dhabi culture and tourism plans; Qatar vision 2030, Ministry of Culture, Arts and Heritage; Bahrain 2030, Bahrain Authority of Culture and Antiquities; Oman's Five-Year Development Plan (2016-2020); New Kuwait 2035; Strategy& analysis

L&E offerings vary considerably by country. For example, the UAE has a large range of entertainment options in proportion to its population, including theme parks, flagship sports events, concerts, festivals, and recreational activities. The quality of visual arts offerings in the UAE is high, including international institutions such as the Louvre Abu Dhabi, and renowned art exhibitions. However, the country is slightly behind when it comes to the volume of offerings in the visual arts; hence their increased focus on building this part of the sector.

Saudi Arabia has a limited supply of L&E offerings relative to its population size. Yet if it achieves its plans, its overall L&E offerings, excluding sports, will be the richest and most diverse in the region in absolute terms. The ministry of culture is currently developing the visual arts and live entertainment categories with the aim of “turning Riyadh into an open gallery,” and creating a flourishing arts and culture scene across the country. It also aims to strengthen community-oriented offerings and increase the supply of international-scale concerts and festivals.

Bahrain’s supply of L&E offerings is high in proportional terms. The country has a renowned set of libraries, along with a strong live entertainment sector, including theaters and festivals. In terms of neighborhood recreation, Bahrain benefits from strong family entertainment events. Qatar’s supply of sports and visual arts offerings is well advanced, at the expense of other recreational and entertainment activities.

Kuwait is mainly focused on providing cultural offerings, with a strong focus on libraries, followed by visual arts, especially with the recent opening of the Sheikh Jaber Al-Ahmad Cultural Centre. It also has a strong focus on accessible recreational options, especially outdoor parks. Oman is notable for offering prestigious national and international opera performances, as it is home to the region’s oldest opera house.



CONSUMERS PREFER LIGHT OFFERINGS

From a demand perspective, it is important to understand GCC consumers' engagement levels (see *"Defining the L&E industry," page 5*) among the different L&E categories and identify their preferences and requirements for future offerings. Our survey shows that the region has relatively lower levels of engagement in culture-oriented offerings and favors lighter L&E activities, such as neighborhood recreation and sports. Indeed, the main motive for engaging in L&E activities is "to have fun" (70 percent of respondents), far ahead of other options such as enriching their knowledge and general culture (40 percent), and strengthening bonds with family and friends (39 percent).

In all GCC countries, engagement is higher for neighborhood recreation and sports, followed by theme parks. Engagement was lowest for the visual arts and live entertainment, particularly opera (see *Exhibit 6, page 12*). The notable exception is Oman, where opera is an established cultural offering.

The low level of engagement with the cultural activities in the visual arts and live entertainment stems from two main challenges. First, the GCC public has limited awareness of the available offerings. Second, those who are aware, and do attend visual arts and live entertainment events, tend not to be satisfied with the quality of current offerings. Survey respondents in most GCC countries were least satisfied with their own city's visual arts and live entertainment offerings. Based on survey results, these offerings lack variety and are not always culturally relevant.

Other aspects of the analysis are worth noting. First, younger demographic cohorts in the GCC show higher engagement levels with the visual arts and live entertainment than older groups. This points to a promising future, in that the youth are more accepting of arts and culture and that the demand for these categories is likely to increase over time.

Second, the activities in greatest demand among respondents are urban parks and family entertainment centers, followed by sport activities, accessible neighborhood events, and finally theme parks. Also, there is considerable demand for cinemas, which is expected to grow in the future. Despite the rise in streaming video, GCC consumers still value out-of-home offerings.

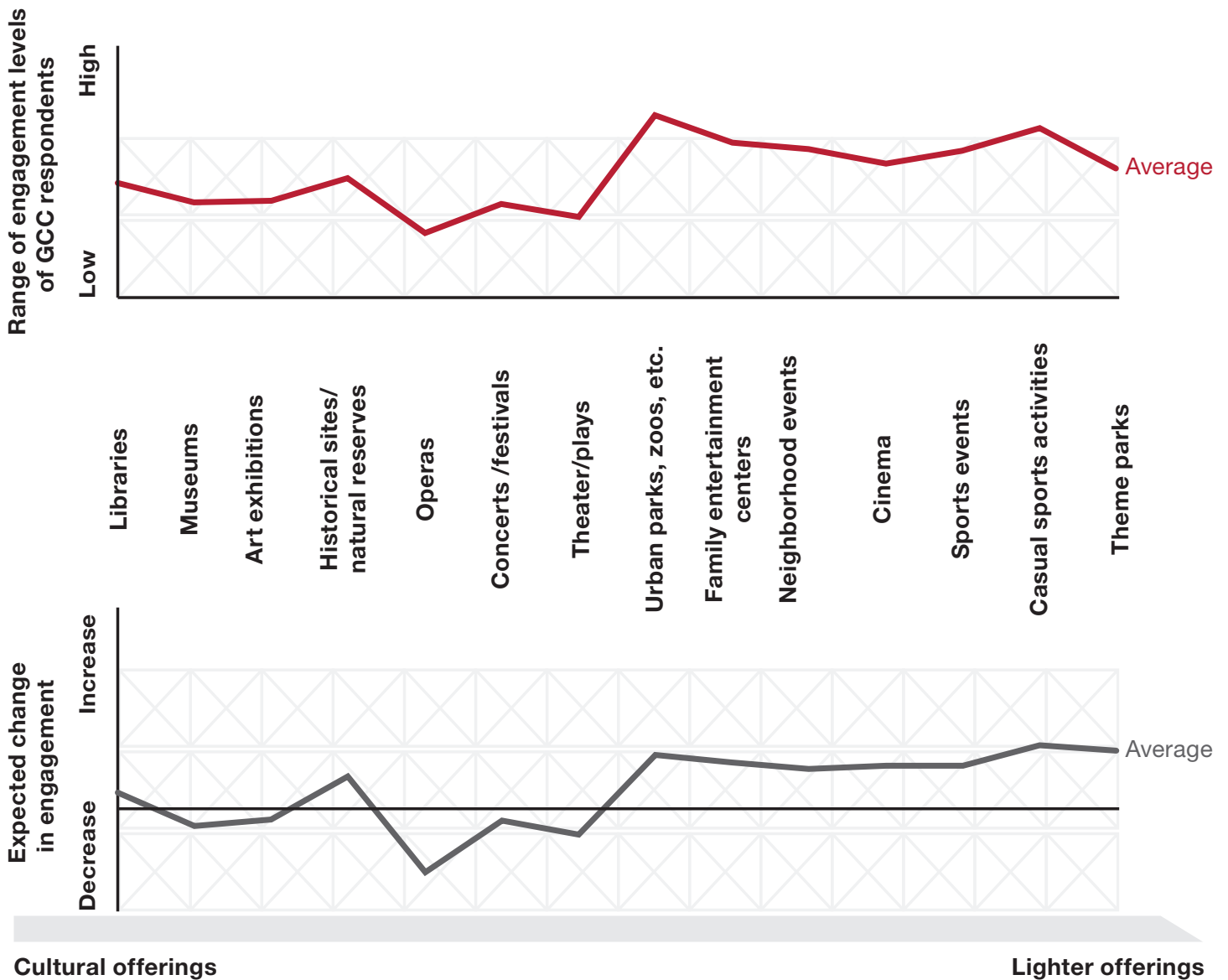
Third, engagement with theme parks would be even stronger if these activities were more affordable, with 56 percent of respondents stating that the high price of such offerings prevents them from visiting, or visiting more often.

Fourth, Saudi and UAE consumers have the highest engagement levels in L&E activities. Despite a high supply of offerings in most activities, Bahraini citizens have the lowest levels of L&E engagement. In part, this is because many of the offerings in Bahrain cater to tourists.

These findings have implications for future demand, such as that the preference for more entertainment offerings is likely to grow. Respondents aim to increase their consumption of sports activities and neighborhood recreation, followed by theme parks. At the same time, our research shows that engagement levels for visual arts and live entertainment are likely to remain flat or even decrease in some countries based on respondents' views unless governments work to actively raise awareness and interest in these sectors. These trends are the same across all GCC countries.

EXHIBIT 6

GCC residents prefer lighter entertainment offerings; and aim to further decrease their engagement with the more cultural ones



Note: Survey questions were "How frequently do you engage in these entertainment activities in your city? (daily, weekly, monthly, two or three times a year, once a year, never; repeated for the different activities)" and "How is your consumption on L&E activities likely to change in the next year?"
 Source: Strategy& survey

THREE OPPORTUNITIES TO STRENGTHEN L&E IN THE GCC






With these findings in mind, GCC governments have important opportunities to boost demand and consequently increase returns on investment in the L&E sector (see *Exhibit 7*). The Ideation Center has identified three priorities for GCC governments:

1. Increase sensibility to arts and culture
2. Focus on neighborhood-based offerings
3. Invest more carefully in theme parks

EXHIBIT 7

Governments can take action now to improve demand maturity and optimize social and economic returns

Gap analysis (2018)

	Visual arts 	Live entertainment 	Neighborhood recreation 	Sports 	Theme parks 
Saudi Arabia					Respond to the high demand for theme parks
UAE			Focus on developing neighborhood recreation offerings, urban parks, family entertainment centers, and events	Maintain a focus on developing sports centers and hosting international events	
Qatar	Increase citizens' sensibility to arts and culture				
Bahrain					Cater the demand for theme parks experiences through family entertainment offerings
Oman	Respond to citizens' needs for museums, libraries, and art exhibitions			Respond to citizens' needs for sports stadiums and events	
Kuwait					

■ Top priorities ■ Secondary priorities

Note: UAE = United Arab Emirates.
Source: Strategy& survey

1. Increase sensibility to arts and culture

GCC consumers are not sufficiently engaged in arts and culture. Given that these unique endeavors and resources are an inherent part of the GCC governments' values and aspiration for their nations, their first priority should be increasing awareness of, and sensibility to, arts and culture.

To that end, governments should ensure that everyone can engage and participate in attractive, compelling visual arts and live entertainment activities, by making these more accessible, attractive, modern, and engaging. Governments can publicize offerings in dedicated public spaces and encourage peoples' participation, mainly by creating arts and cultural experiences in more engaging ways. In the long term, governments should further strengthen the supply of offerings by nurturing creative talent and securing funding.

Make arts and culture offerings more available and accessible

Other countries have created cultural experiences that are attractive, easy to participate in, and accessible to large numbers of people. For example:

- Nuit Blanche, an annual, all-night festival in which a city center is transformed into art galleries that showcase installations and performances. Museums, galleries, and other cultural institutions are usually accessible for free. Helsinki was the first city to launch this initiative. Other cities have followed, including Paris, Naples, and Beirut.
- Europeana, the European Union's online cultural heritage platform, deploys pop-up and digital booths that showcase art pieces from leading European museums during events and festivals. In addition to making works of art more accessible, this initiative increases engagement among individuals by encouraging them to share images of museums' holdings online.
- Screen on the Green is an annual summer event held in the U.S. city of Atlanta that shows famous movies on large screens outdoor, free of charge.

Create immersive and engaging experiences

Individuals are also more likely to engage with immersive and participative experiences, rather than the standard exhibition of a hushed room with artifacts on the wall. Adopting emerging technology is one way to create this kind of experience. The Australian government, for instance, has succeeded in using digital tools to increase citizens' engagement at museums. The Museum of Old and New Art in Melbourne offers visitors art processors — mobile interpretive tools that allow customers to access richer content for nearby items, instead of reading wall labels. Similarly, the museum's Scienceworks exhibition lets visitors create and share inventions, such as developing a car digitally. Other museums also allow for 3D printing of showcased objects or interactive video conferencing with schools. These initiatives have led to a 13 percent increase in visitors between 2008 and 2014 for museums that are managed by the Council of Australian Museum Directors.⁴

The Singapore model for popularizing the arts

In 2011, the Singapore government launched an initiative to instill culture in the values of its citizens by “bringing arts and culture to everyone, everywhere and everyday.” The government’s target was to increase the percentage of Singaporeans who attend at least one arts and culture event each year from 40 percent in 2013 to 80 percent in 2025, and to raise the percentage of Singaporeans actively participating in arts and culture activities from 20 percent in 2011 to 50 percent in 2025. According to Singapore’s 2017 National Population Survey on the Arts, 54 percent of Singaporeans attended at least one art event, an improvement compared to 2013.⁵

Singapore’s plan includes three steps:

- Reaching new audiences through organizing an annual “arts and culture” day, providing

popular public spaces for exhibitions and performances, and showcasing all arts and culture activities and content on a single portal.

- Sustaining engagement by facilitating mentorship for hobbyists or supporting community-based professional arts and culture groups in schools.
- Galvanizing a national movement by nurturing champions for arts and culture, establishing a community arts and culture club, or even strengthening support for independently initiated projects and programs.

Nurturing talent and securing funding to grow the sector in the long term

In the longer term, building richer local cultural offerings will be vital to sustaining demand and engagement in the GCC. Governments can nurture talent through dedicated education programs and arts and culture clubs; and promoting careers in the field is key.

Although governments can help by channeling funding to the sector, they cannot shoulder the entire burden of financial support. By their nature, cultural institutions in all markets struggle to turn a profit, which is why private donations and investment are important. In the U.S., for instance, public funding constituted only 15 percent of L&E income in 2006-2010. The majority of contributions, 64 percent, were generated by corporate and individual funding, followed by 21 percent from foundations.⁶ GCC governments should therefore attract that private funding by initially grouping potential philanthropic funders. Governments can then assess what would be required to convert each group into a funder of arts programs. The range of groups includes high-net-worth individuals and families, companies and corporations that have shown interest in funding arts, and charitable foundations. These funders may also invest in the improvement of local capabilities, particularly in creative fields such as music, writing, and painting.



2. Focus on neighborhood-based entertainment offerings

The second priority for GCC governments is to increase their investments and national focus on providing comprehensive neighborhood entertainment offerings. These mainly include urban parks, family entertainment centers, cinemas, and a rich calendar of events and fairs.

Family entertainment centers such as Magic Planet and Kidzania are typically more profitable than large theme parks, with a return on investment of 20 percent or more. These should be the priority for smaller GCC countries rather than large theme parks. The more modest scale of family entertainment centers means that they are faster and easier to develop, and thus very attractive to the private sector.

Also, consumers increasingly enjoy outdoor urban parks, which is why governments should make them more available and accessible by developing new options closer to prime city locations. The Greater London Authority states its requirements for different types of parks — such as size guidelines, distances from homes, and other criteria — to all relevant stakeholders, including local authorities, builders, buyers, architects, and developers. By keeping the process transparent and straightforward, the city hopes to increase the number of parks overall.⁷

Governments can also improve existing parks by making them more accessible. The Greater London Authority, for example, developed Policy G4 on local green and open space works to improve access to public parks and open spaces.⁸ Although developing urban parks is typically a public-sector initiative, it creates opportunities for the private sector in areas such as food and beverage outlets, entertainment, maintenance, and other concessions. By building the required infrastructure and creating a comprehensive neighborhood offering, governments can give their people — and specifically families — more accessible leisure options, helping them enjoy an enhanced quality of life and engage more with their community.

3. Invest more carefully in theme parks

Our analysis shows growing demand for theme parks. Despite this potential, GCC governments need to assess any opportunities carefully. Theme parks require large and complex investments, and there is typically a lengthy period before they break even, in part because of high operating costs. If successful, however, they can increase tax revenues, create jobs, and attract tourism. In addition, they can generate a spillover effect with benefits for the broader national economy, in several areas:

- new players in the hospitality industry to accommodate an influx of customers
- additional local and international L&E players attracted by the available infrastructure
- an improvement in local offerings to meet the standards of a global theme-park brand

For example, each of Walt Disney's market expansions led to significant economic benefits to the host countries. Disneyland Paris became the top European tourism destination, welcoming 14.8 million visitors in 2017. According to Disney, the result has been "€68 billion [\$76 billion] in added value to the French economy" since it opened in 1992, and it has become "the largest single-site employer" in the country, with 15,000 employees in 2017.⁹ In Hawaii, Aulani Disney Resort and Spa led to the emergence of the "Moana Effect," encouraging an interest in the Hawaiian culture, and consequently resulting in other properties following the same direction and offer new cultural experiences.¹⁰

Any country considering such an initiative must start by ensuring that its market is large enough to sustain a theme park. Saudi Arabia can be the hub for these theme parks in the GCC, as it has a sufficiently large market. The country is already moving in that direction, with the Al Qiddiyah Entertainment City development project near Riyadh.

To attract the private sector to help build such theme parks, the Saudi government can provide regulatory support or transportation infrastructure. It is also critical to streamline visa processes for regional or international tourists to visit the park once it opens.

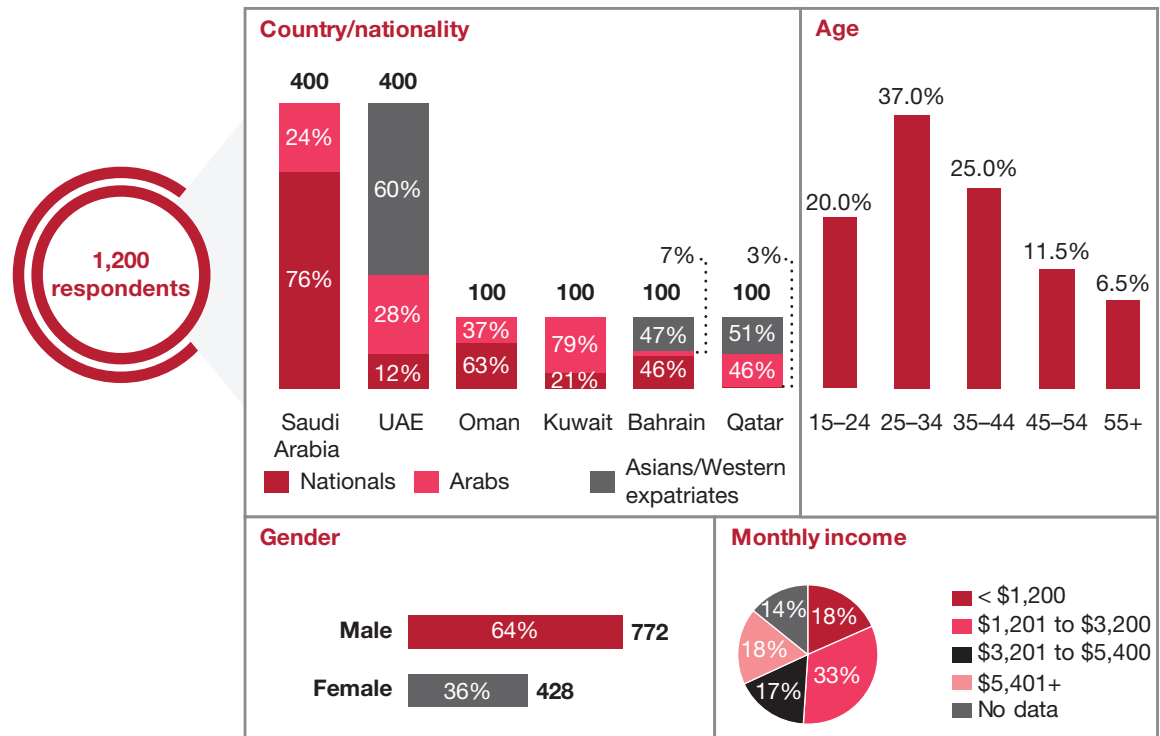
CONCLUSION

The current L&E investments under way in GCC countries are ambitious. To make the best of them, GCC governments should further encourage popular engagement and participation in arts and culture offerings, increase the availability and accessibility of neighborhood entertainment offerings, and selectively invest in theme parks. By working in partnership with the private sector, GCC governments can develop the L&E sector so that it also opens the region to an influx of international tourists. In turn, this could unlock significant economic potential for the region, helping countries to fulfill their national development objectives.

APPENDIX: SURVEY METHODOLOGY

The Ideation Center conducted a survey of 1,200 citizens and residents in the six GCC countries in August 2018 about L&E offerings in the region (see *Exhibit 8*). The survey included nationals, as well as Arab, South Asian, and Western expatriates. The survey asked respondents about their frequency of engagement with L&E activities; their spending levels; future expected changes in consumption, content, and companion preferences; potential improvement areas; and the perceived benefits of L&E.

EXHIBIT 8
Strategy& L&E survey overview



Note: UAE = United Arab Emirates.
Source: Strategy& survey

ENDNOTES

1. The GCC countries are Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.
2. Based on our definition of the sector and including home recreation, neighborhood recreation, live shows, visual arts, theme parks, and sports.
3. Office for National Statistics, “Average household income, UK: Financial year ending 2018,” February 26, 2019 (<https://tinyurl.com/y5une8mb>); “Components of household expenditure: Table A1,” January 24, 2019 (<https://tinyurl.com/y5wqsytc>).
4. J. Patrick Greene, “Visits to Australia’s museums rise on the back of a digital experience,” October 22, 2014 (<https://theconversation.com/visits-to-australias-museums-rise-on-the-back-of-a-digital-experience-32699>).
5. Toh Wen Li, “Participation in arts events reaches highest levels since 2005, excluding SG50 year,” *Straits Times*, September 17, 2018 (<https://www.straitstimes.com/lifestyle/arts/participation-in-arts-events-reaches-highest-levels-since-2005-excluding-sg50-year>).
6. National Endowment for the Arts, “How the United States funds the arts,” November 2012 (<https://www.arts.gov/sites/default/files/how-the-us-funds-the-arts.pdf>).
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8. Mayor of London, London Assembly Policy G4 Local green and open space (<https://www.london.gov.uk/what-we-do/planning/london-plan/new-london-plan/draft-new-london-plan/chapter-8-green-infrastructure-and-natural-environment/policy-g4>).
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10. Valerie Marino, “The Moana effect: Can you find authentic Hawaii at a Disney resort?” CNN, March 25, 2018 (<https://edition.cnn.com/travel/article/moana-hawaii-tourism/index.html>).

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