

Entertainment in
MENA: building
the ecosystem





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Executive summary

The entertainment sector, from sports, media and gaming to theme parks and theatrical events, is a major contributor to GDP, job creation, economic dynamism and cultural exchange. Globally, the cultural and creative industries accounted for US\$3.4t, or 4%, of global value-added in 2019.¹ In the US, arts and cultural economic activity accounted for 4.3% (US\$919.7b) of GDP;² while, in Europe, it represented 4.4% (EUR643b) of EU GDP in 2019. In some emerging economies, creative industries make a larger than average contribution to growth, accounting for 7.4% of Indonesia's GDP, for instance, and employing 14.3% of the workforce.³

Government support of the entertainment sector – through subsidies, incentives or direct investments – is predicated on its economic and societal dividends. Its financial contribution covers direct spending on events and performance, indirect spending on suppliers, vendors and business services and “adjacent” spending like merchandise or tourism. Socially, the sector improves the quality of life and helps countries to project “soft power” and find their voice in the international arena.

The MENA region has the fundamentals for a vibrant and growing entertainment sector, thanks to strategic government investment, distinct heritage and cultures, and an engaged population. But to truly thrive, governments who have shown strong support for the sector to date now need to calibrate their interventions to focus on helping the private sector take the lead.

This EY report presents five growth drivers of MENA's entertainment industry: government backing, a rich cultural heritage, theme parks, a thriving gaming and esports sector and high revenue-grossing box office entertainment. It also outlines the key calls to action now needed to maximize the opportunity: empowering the private sector, building the talent pool, regional coordination and adjusting to post-pandemic realities.







Chapter
01

Drivers of MENA's
entertainment growth

01

Government backing

MENA governments have demonstrated strong support for entertainment as part of their broader economic transformation strategies to build non-oil sectors and nurture industries with high job creation potential.

Saudi Arabia's Vision 2030 includes specific support measures and a US\$64b investment plan geared to help the entertainment sector contribute more than US\$23b, or 3% of GDP by 2030, creating more than 100,000 jobs.⁴ Huge infrastructure spending will buoy the sector via leisure facilities, and the Public Investment Fund (PIF) is launching a range of mega-projects, cinemas, and entertainment complexes, through Saudi Entertainment Ventures (SEVEN). The company plans to invest SAR50b (US\$13.3b) to develop 21 integrated entertainment destinations with over 150 innovative attractions, in partnership with prominent international brands, across 14 cities in Saudi Arabia. The government is promoting the country as a tourism destination globally with the Saudi Tourism Authority (STA) expanding into 12 new overseas offices by 2022 and new agencies have been developed to support culture and entertainment.⁶

The UAE is already a global tourism and leisure hub, its reputation cemented through the recent hosting of the World Expo. Abu Dhabi is now consolidating its culture and creative industries with museums and media sector infrastructure being placed into a single unit, the Department of Culture and Tourism (DCT) Abu Dhabi. The government plans to spend US\$6b by 2026, targeting the creation of 16,000 new jobs by 2026.⁷ Dubai is seeking to increase the contribution of creative arts to its GDP from 2.6% in 2020 to 5% by 2025, with plans to launch new creative zones that will increase the number of companies from 8,000 to 15,000 by 2025 and grow the number of jobs from 70,000 to 150,000.

With the FIFA World Cup, Qatar has a unique opportunity to capitalize on the culture, sports and youth sector as part of the National Vision 2030. It is the first Middle Eastern nation to host the World Cup. With an estimated 1.2 million World Cup visitors, Qatar is expected to generate an estimated US\$20b, equivalent to 13.5% of its 2020 GDP.

Driving forces behind MENA's entertainment industry



Qatar
(FIFA World Cup 2022)

| Govt. spend | By year | Jobs created |
|-------------|---------|--------------|
| US\$300b | 2022 | 1.5m |



Saudi Arabia

| Govt. spend | By year | Jobs created |
|-------------|---------|--------------|
| US\$64b | 2030 | 100,000 |



UAE

| Govt. spend* | By year | Jobs created* |
|--------------|---------|---------------|
| US\$6b | 2026 | 16,000 |

* mentioned government spending and jobs created data is only for the Emirate of Abu Dhabi

Mega-projects to boost entertainment

Qiddiya: Qiddiya is an Entertainment, Sports and Culture destination covering over 367 square kilometres (sq.km.) of land. Qiddiya's visitors will enjoy a wide spectrum of offerings such as Six Flags Qiddiya, the region's largest water theme park, sports facilities such as football stadium, performing arts theatre, multiplex cinema, and a range of cultural and artistic activities.⁹



World Expo 2020: The Expo 2020 Dubai, which was a huge exhibition on creative and cultural themes, attracted huge attendance of more than 20 million, driven by digital experiences, music concerts, sports events, arts and crafts, and live performances.¹⁰ After its conclusion, the site will become part of District 2020 to be used as a smart and sustainable mixed-use urban development and will include a science center and a cultural center.¹¹

Hatta: Dubai plans to transform Hatta into a global tourism, business and investment hub. The Hatta Master Development Plan forms an integral part of the Dubai 2040 Urban Master Plan and aims to conserve Hatta's environment and its cultural heritage and promote it as a tourist destination.¹²





02

Rich heritage and culture

While government investment is crucial, it cannot, on its own, build a thriving entertainment industry. Every nation must harness its history and culture and MENA countries are drawing inspiration from their past as they build their entertainment industries of the future.

Saudi Arabia is upgrading existing museums, including the National Museum and the Masmak Fort Museum in Riyadh, and launching new ones including the Black Gold museum in Riyadh, teamLab Borderless in Jeddah, the Royal Art Complex Museum, the Digital Art Museum and the Museum of Prince Mohammad bin Salman International Centre for Arabic Calligraphy.¹⁴ The government plans to encourage grassroots artists to nurture appreciation of Saudi and Arab art and enable cultural diplomacy and exchange. The country hosted its first art biennale, Diriyah Contemporary Art Biennale in 2021 and Desert X art festival in Al Ula in 2020, while Diriyah Islamic Arts Biennale is planned for 2023.

In the UAE, Dubai inaugurated its Museum of Future in February 2022, which joins the list of the UAE's growing list of attractions, such as Jameel Arts Centre, Etihad Museum, Alserkal Avenue in Dubai and Sharjah Art Museum in Sharjah.¹⁵

Cultural investments in Saudi Arabia and the UAE

Saudi Arabia

- ▶ Al Ula: A world-class open-air museum on Arab civilization and culture (Mada'in Saleh, Saudi Arabia's first UNESCO heritage site and the second largest Nabatean site after Jordan's Petra). The destination includes cultural sites, museums and recreational activities. Winter at Tantora Festival, an annual cultural festival, is also held at Al Ula.
- ▶ Diriyah Gate: Al-Diriyah, the birthplace of the House of Saud, is being transformed into a cultural destination, with restored buildings, alongside museum galleries and exhibitions. Diriyah Square, part of the US\$50b Diriyah giga-project, offering culture, leisure, and entertainment experiences, is scheduled to open by 2024.¹⁶
- ▶ Further tourism-related projects include Amaala, a wellness tourism destination with art galleries; Al Soudah, a new US\$3b venture in the Asir region; Dadan, a city dating back to the first millennium BCE.¹⁷

UAE

- ▶ Saadiyat Cultural District: In Abu Dhabi, Saadiyat Island Cultural District houses a cluster of world-class cultural assets. It is fast growing into the UAE's cultural hub with the Louvre Abu Dhabi museum joined in the near future by the Zayed National Museum and the Guggenheim Abu Dhabi.¹⁸
- ▶ Alongside the museums and heritage sites that Dubai Culture manages, the authority grants creative industry players several platforms to express themselves, including Sikka Arts Festival, Dubai Festival for Youth theater, and Emirates Airline Literature Festival.
- ▶ Sharjah's cultural calendar has evolved to feature international book fairs, exhibitions at more than 16 museums and, festivals that celebrate photography, theater, poetry and calligraphy.¹⁹



03

Gaming and esports

The MENA region boasts one of the fastest-growing gaming sectors globally, driven by the number of active and paid gamers in Saudi Arabia and the UAE.²⁰ Gaming market revenue in the Middle East reached an estimated US\$3.4b in 2021, a growth of 19% y-o-y. Saudi Arabia's gaming market generated approximately US\$0.9b in revenues, while, the UAE generated US\$0.5b in 2021.

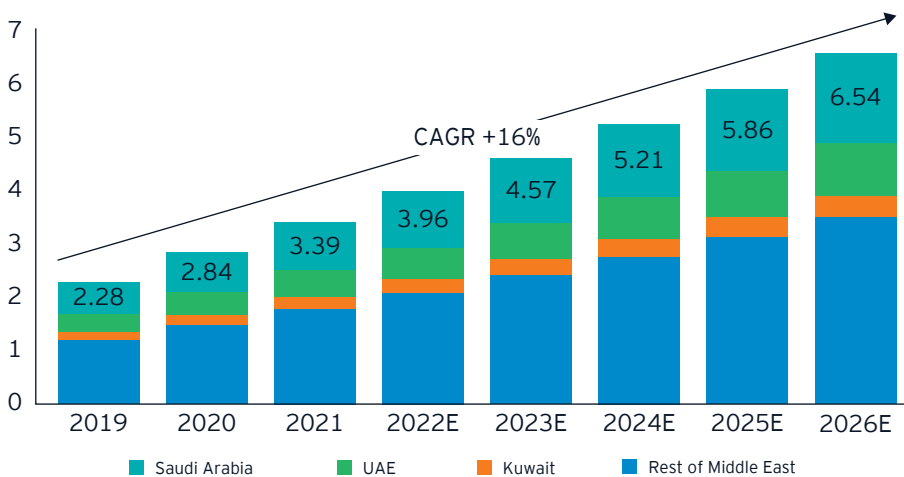
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Gaming has been an area of exponential growth with the Middle East consumers ranked among the highest in spending on e-gaming and e-sports, most of which is outbound revenue. This represents a significant opportunity for the region to re-capture some that revenue domestically.



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Middle East gaming and esports revenue by country (in US\$b) 2019-26



*E: Estimated
Source: "Middle East Media and Entertainment market (2020-25)", Mordor Intelligence, via EMIS

The market is now evolving from casual gaming to competitive sports and virtual reality games. Video game revenues almost doubled over the last five years, boosted by new releases from publishers, combined with the growth of in-game microtransactions and advertising. Mobile gaming is the largest segment, driven by strong smartphone and internet infrastructure in Saudi Arabia and the UAE.²¹



04 Theme parks

The MENA region is developing world-class themed entertainment destination parks, leveraging cutting-edge technology including augmented reality (AR) and virtual reality (VR). Major upcoming projects in the region include:

Six Flags at Qiddiya

Six Flags Qiddiya will serve to be a key entertainment attraction for Qiddiya and the city of Riyadh. The theme park will cover an area of 320,000 square meters and will feature 28 rides including the world's tallest, fastest, and longest coaster.²²

The region's largest water theme park will cover 252,000 square meters of land and will be home to 22 rides and attractions – including nine that will be world firsts.

The Rig

An extreme entertainment attraction, proposed to open in 2025, featuring an oil rig converted into a massive 1.6 million-square-foot resort – with roller coaster rides, waterslides, and adventure sports such as diving and bungee jumping.²³

SEVEN's entertainment destination

Seven has begun construction of its first entertainment destination in Al Hamra, Riyadh. It will feature a range of experiences including indoor surfing, bowling, indoor skydiving and indoor karting racetrack. Its other entertainment projects will be located in Kharj, Makkah, Jeddah, Taif, Dammam, Khobar, Al Ahsa, Madinah, Yanbu, Abha, Jazan, Buraidah, and Tabuk.

Yas Island

Abu Dhabi's Yas Island, which already includes several entertainment destinations including Ferrari World and Warner Bros World, will add SeaWorld Abu Dhabi, a marine-life theme park, with the world's largest marine aquarium, which is slated to open in 2023.

Kuwait Entertainment City

Kuwait is working to accelerate rehabilitation works at the Kuwait Entertainment City amusement park and recreation center, theme parks, water park, and sports arena.



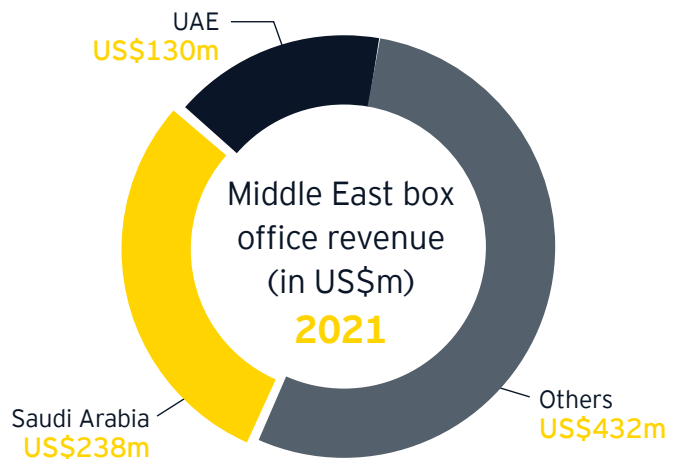
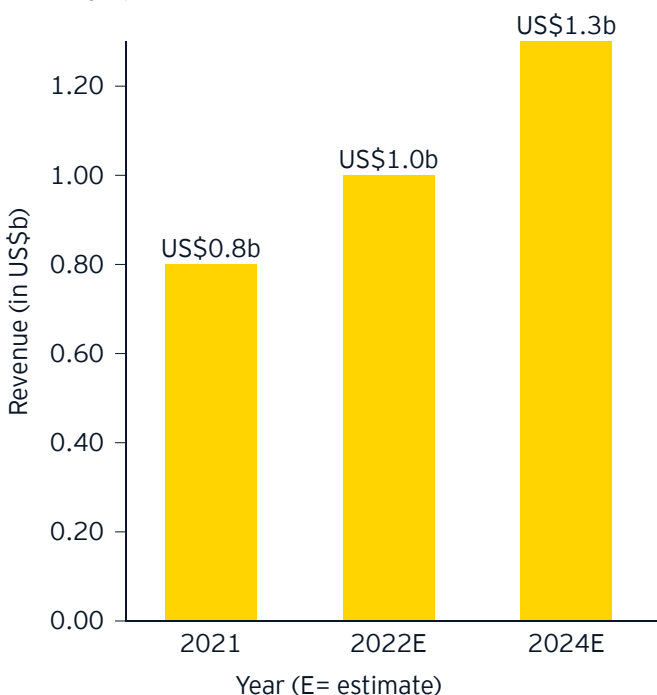
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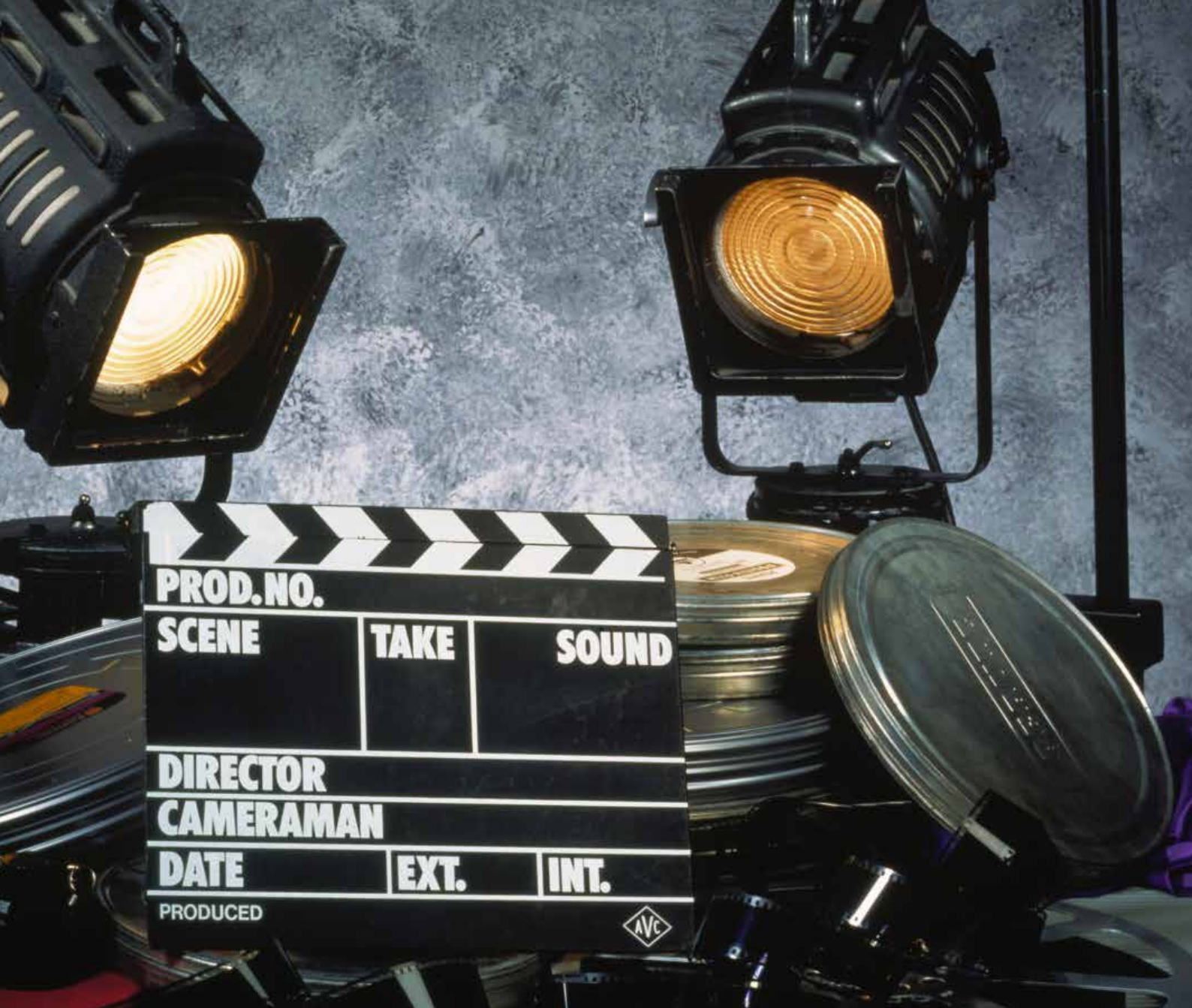
Box office entertainment

Box office revenues in MENA reached an estimated US\$800m in 2021 and are expected to surpass US\$1b by the end of 2022.²⁴ Saudi Arabia has emerged as the fastest-growing market in the region, with box office revenue totaling US\$238m in 2021, an increase of 95% over US\$122m in 2020. The country has surpassed the UAE, which achieved box office revenue of US\$130m in 2021.²⁵

Since the Saudi Arabian government reversed the cinema ban and reopened movie theaters, a thriving sector has emerged, with the addition of 53 cinemas, 430 screens with more than 41,000 seats and 11 companies specialized in cinema operation now working across the country, including nine international companies.²⁶ The total number of screens in the Middle East is expected to increase from 2,100 in 2021 to 3,100 by the end of 2024, with the most incremental growth coming from Saudi Arabia.²⁷

Middle East box office revenue (in US\$b) **2021-22**





Cinema investment plans²⁸

| Emaar | MUVI Cinemas | AMC Entertainment | Vox | Cinépolis |
|---|--|---|---|---|
| <p>Emaar Entertainment plans a US\$270m Reel Cinemas roll-out in Saudi Arabia with plans to open more than 20 venues by 2026.</p> | <p>MUVI intends to grow to 307 screens nationwide by 2022, adding 204 screens. Also, plans for eight additional locations, on track to exceed 600 screens by 2024.</p> | <p>AMC Entertainment plans to expand to 50 locations by 2024.</p> | <p>Vox Cinemas plans to build 600 screens across Saudi Arabia by 2023 as part of a US\$530m investment.</p> | <p>Cinépolis is investing more than US\$300m to launch six new movie complexes with 63 screens by 2023.</p> |



Chapter 02

Realizing entertainment's potential

While MENA's entertainment sector is gathering momentum, to reach its full economic and social potential requires a step-change – in particular, greater participation from the private sector and a shift in government attention from financing to broader ecosystem support. This chapter outlines four key focus areas which could help the region achieve its goals for the creative and cultural industries: empowering the private sector, nurturing the domestic workforce, coordinating national efforts into a coherent regional strategy, and adjusting to the opportunities and constraints of this sector in a post-COVID-19 world.



01 Empower the private sector

Top entertainment markets share a common characteristic: a thriving private sector, from large corporates to start-ups, freelancers and creative industry entrepreneurs. Governments are an important source of financial and policy support but ultimately, they act as a catalyst for the private sector.

Currently, MENA's entertainment private sector is growing, but could, with the right support, expand into a leading role. To help the private sector achieve that role, governments should focus on improving digital infrastructure, introducing measures that incentivize SMEs to adapt to structural changes, including shifts in consumer behavior and seize new opportunities.

Key focus areas for the near term are:

- ▶ Engage the private sector through public-private partnership (PPP) models.
- ▶ Promote entrepreneurship and encourage start-ups and expand the scope of SMEs to provide benefits in the form of collateral-free loans and equity support.
- ▶ Encourage local and international investors to forge partnerships and attract investments.
- ▶ Sign bilateral co-production agreements to enhance local production.
- ▶ Provide tax breaks and other incentives and widen the scope of innovation-led incentives to account for entertainment companies.
- ▶ Ensure strong protection and enforcement of IP and copyright to protect the ownership of content.
- ▶ Appoint industry experts as mentors and advisors to private companies.

“

For the Middle East entertainment sector to mature and achieve its potential, the private sector needs to play a more prominent role. Today, entertainment companies in the region may not be — on average — at the same level as their counterparts in mature markets in terms of capability and availability. We don't have that many companies that can seamlessly deliver marquee events or mega destinations, for instance. This needs to change if we want to have a global top-tier entertainment sector.



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02

Nurture the workforce

Staffing is a bottleneck for the entertainment industry currently, especially in large-scale projects and events. Despite a relatively young population, with around 400,000 new entrants to the job market every year, there are limited incentives to enter the private sector due to wage differentials and skill-set requirements. In Saudi Arabia, for instance, around half of locals are employed in the public sector, which commands an average of 55% higher pay than the private sector.²⁹

Key focus areas are:

- ▶ Forge a culture that promotes the entertainment sector as a viable career option and tackles negative perceptions among locals.
 - ▶ Develop state-of-the-art educational institutions and form agreements with international academies and reputable institutions to set up branches locally and establish residency programs.
 - ▶ Provide scholarships for international universities and institutes, and incentivize courses on cultural entrepreneurship and sustainable management.
 - ▶ Leverage the power of the state to bring in global talent through exchange programs and provide opportunities for local creative professionals to participate in international markets.
- Entertainment companies are also struggling to hire foreign talent and staff due to logistical hurdles, exacerbated by the COVID-19 restrictions. Both the Saudi Arabia and the UAE governments have launched initiatives to build the workforce and human capital, including academies and scholarships. Governments need to work more actively with the private sector and academia to build an ecosystem to qualify and train more talent across the value chain.
- ▶ Incentivize private companies to partner with academia for talent competitions, and support centers of excellence and e-learning tools to prepare students for real-world issues.
 - ▶ Expand cultural funding to community arts organizations, artists, freelancers and technicians, and strengthen pay and working conditions for arts and entertainment sector workers.
 - ▶ Manage supply and demand of talent across the value chain to avoid mismatches in any specific field of expertise.
 - ▶ Ease up the visa process and offer creative solutions such as freelance visas, making it easier for those who are self-employed to work without obtaining work permits and employment contracts.



03

Competition vs. collaboration

Major MENA cities such as Riyadh, Dubai, Abu Dhabi and Doha are vying to establish themselves as the premier hub of economic activity in the region. Saudi Arabia's US\$800b project to double the size of Riyadh is, for example, a challenge to Dubai's status as the primary business center. From January 2024, the Saudi Arabian government will no longer sign government contracts with foreign companies that base their Middle East headquarters outside of the country.³⁰

The challenge, in economic policy and entertainment, is balancing healthy competition that encourages investment and an improving environment, vs. an unproductive competition that cannibalizes on each other's efforts. One helpful approach in entertainment is to regionalize events and entertainment and work to support tourism across multiple destinations to encourage tourists to broaden their interest in the region.

Key focus areas:

- ▶ Form a single-window system for investors and businesses which can act as a facilitation office for all approvals and clearances related to entertainment, culture, sports and media.
 - ▶ Facilitate and promote inter-ministerial cooperation for the development and implementation of a national policy.
 - ▶ Develop synergies among tourism, entertainment, media and culture sectors.
 - ▶ Collaborate and coordinate across Middle East countries through regional-level calendars of events and activities to avoid cannibalizing each other and ensure a year-round of activities for residents across the entire region.
- There are signs of such coordination efforts. The UAE hosted the 22nd session of the Conference of Arab Culture Ministers in collaboration with the Arab League Educational, Cultural and Scientific Organization (ALECSO) in December 2021. The conference discussed a comprehensive plan for Arab culture and its modernization while promoting cultural cooperation among Arab nations. The main discussions of the conference centered on unifying Arab efforts in various cultural fields and the development of cultural and creative industries in the region. Similar collaboration efforts should be promoted across other fields, including media, entertainment, and sports both regionally and at the country level. The companies can also work together to form regional industry associations which can help coordinate international regulatory affairs as well as help exchange information, experiences and ideas of common interest.
- ▶ Support cross-border collaborations between government agencies and operators at the development stage to replicate success stories and increase return on investment (ROI).
 - ▶ Promote collaborations on joint creative projects with regional artists.
 - ▶ Simplify customs and visa procedures for creative industries in the Middle East region, enabling freer movement of artists and their equipment across the region.



04

Adjust to post-pandemic realities

Entertainment was hit hard by the pandemic and despite the resumption of entertainment activities, the recovery might take longer than anticipated as audiences cautiously return to live in-person events. In addition to health rules, limited attendance, and social distancing norms, venues and park operators have implemented innovations like virtual queues, mobile food ordering and contactless check-ins to enhance safety and improve customer experience. This has led to the proliferation of virtual platforms not just as a medium to entertain but as an interactive arena for audience engagement. As with so many other parts of the economy, the pandemic has permanently changed working norms.

Although some innovations were the need of the hour and carried out purely from a health protection standpoint, they are likely to stay, as they offer improved convenience and better customer experience. The pandemic has, for instance, fast-tracked innovations such as cloud-based solutions, digital payments and AR/VR, aimed at enhancing the customer

Key focus areas are:

- ▶ Continually invest in technology to create fully immersive and connected guest experiences both at venue and home. Widespread adoption of emerging technologies such as the metaverse and extended reality (XR) – the combination of augmented, virtual, and mixed reality – will completely transform the entertainment sector.
- ▶ Deliver data-led consumer insights to manage end-to-end customer experience across multiple touch points.

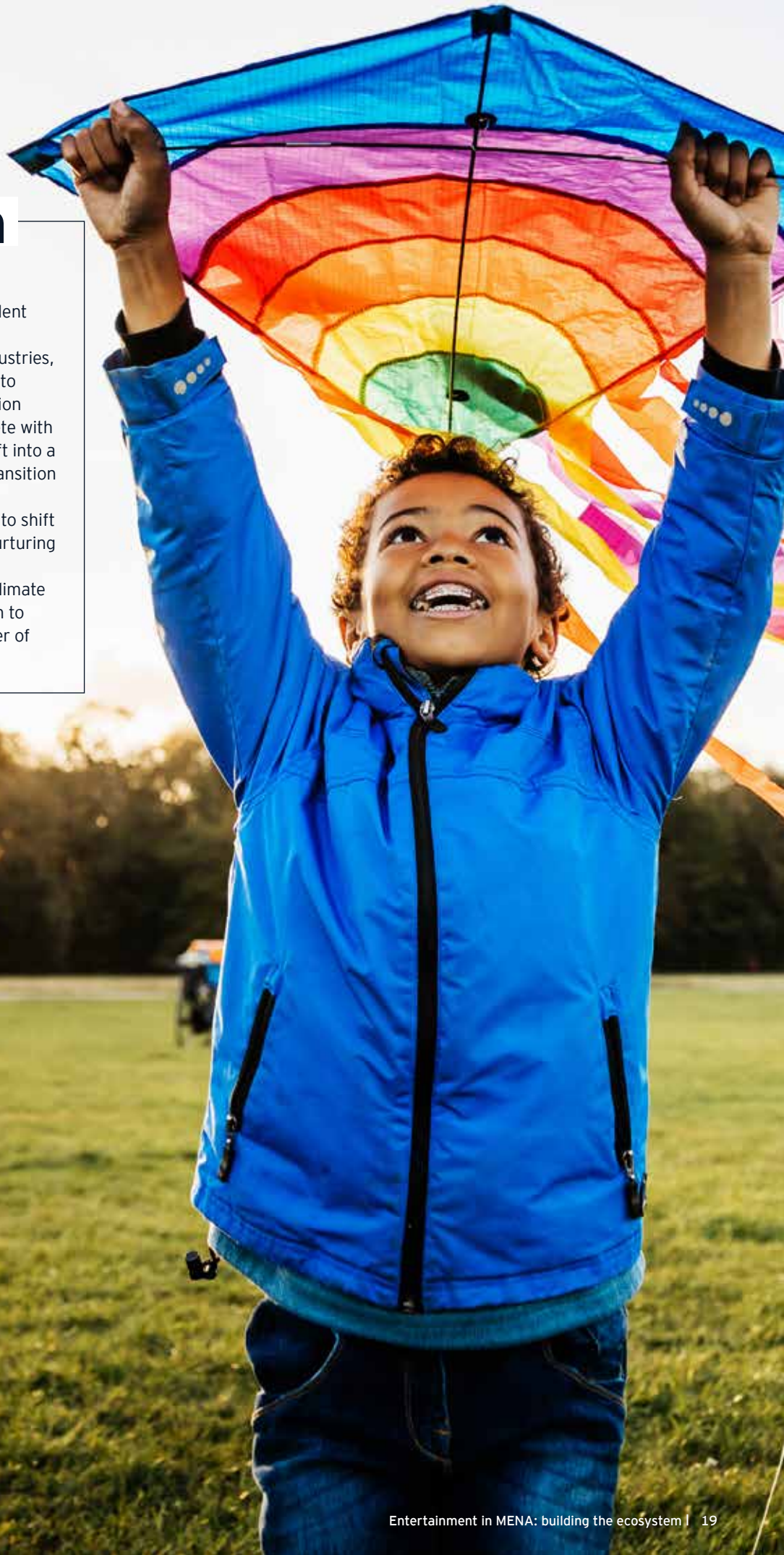
experience. Guest expectations will rise as they start looking for new attractions and operators should plan and budget for reinvestment accordingly.

Young, tech-savvy consumers expect high-quality attractions with a strong technology component. In the future, attractions will need to design their offerings, differently. The use of apps, radio frequency identification (RFID) tags and enterprise software programs allow for rich data collection which can improve everything from ride maintenance to experience personalization. Attractions and amusement park operators need to use enhanced technologies such as data analytics and predictive algorithms creatively to meet rising demands, if they are to maintain occupancy and offer the best guest experience. Music venues, festivals and venue operators are expected to push ahead with creative audience layouts such as boxed seating and car-park concerts to encourage attendance, while also promoting interactive options for fans who are not yet comfortable coming out for an event.

- ▶ Track customer interaction across platforms to improve user experience and enhance decision-making.
- ▶ Offer personalized propositions by leveraging sophisticated data analytics to improve engagement and customer lifetime value.
- ▶ Increase ROI by building a strong and scalable IP or brand which can be utilized beyond its original purpose.

Conclusion

Leading MENA governments have lent sizeable financial and institutional support to their entertainment industries, which they rightly see as essential to economic diversification, job creation and cultural enrichment. To compete with global entertainment hubs and shift into a higher gear, the sector needs to transition to a private sector-led approach. Governments have an opportunity to shift focus from financing projects to nurturing the ecosystem through capacity-building, incentives and business climate reforms, and regional collaboration to help entertainment become a driver of economic and social progress.



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