



**SIGHT**  
**for GROWTH**  
- a monthly series

**MARCH | 2024**



**The evolution of the recreational, leisure, and entertainment landscape in the Middle east reflects its complex history, cultural richness, and rapid modernization.**

**Today, the region offers a unique blend of traditional and contemporary entertainment options, catering to both local population and international visitors.**



Here's a brief overview of how the landscape has evolved:

## Historical Beginnings

### CULTURAL SHOWCASE

Leisure and entertainment in the MENA region historically revolved around cultural practices like storytelling, music and dance linked to religious festivals and social gatherings.



### BAZAARS AND SOUQS

Traditional markets have historically been hubs of social interaction and entertainment, offering a blend of shopping, food, and impromptu performances.

### BEDOUIN INFLUENCES

Outdoor activities like camel racing, falconry, and horseback riding were traditional pastimes in the region reflecting the Bedouin heritage of the Arabian Peninsula.



With the flow of oil money and exposure to the world, the landscape evolved to include modern options for leisure & entertainment:

## Entertainment was merely...



SHOPPING MALLS

EATING OUT



ISTIRAHA GATHERINGS



TELEVISION WITH FAMILY



DESERT CAMPING



# Economic growth, modernization and Digital Age have opened up avenues that are blending the past with the future



Governments in the MENA region are investing in cultural, entertainment, and tourism sectors to reduce dependency on oil and attract international tourists.

In addition, several factors are shaping the evolving landscape of Leisure & Entertainment...



## IMPORT OF GLOBAL ENTERTAINMENT:

The rise in expatriates and global connectivity has led to an increase in international entertainment imports like theme parks, sporting events like FIFA World Cup, Exhibitions like Expo 2020, etc. adapted to local preferences and regulations.



## CULTURAL REVIVAL AND GLOBAL EVENTS:

The region is experiencing a revival in local culture and heritage creating a connect with Arabic culture.



## TECHNOLOGICAL ADOPTION:

The internet and digital technologies changed entertainment consumption with more access to digital streaming platforms, video games, and online content.



## SOCIAL MEDIA INFLUENCE:

Social media platforms influence trends, shape entertainment, and facilitate event organization.

So, what do these changes mean to **consumers**?

How is it impacting and influencing the **choices** they make?

How can companies stay relevant in this **new context**?



# Key Trends across leisure & entertainment in the middle east today



## TREND 1

CULTURAL CELEBRATIONS GALORE.



## TREND 3

UNIQUE & GOURMET F&B EXPERIENCES.



## TREND 5

CONTINUED GROWTH IN DIGITAL ENTERTAINMENT



## TREND 7

BOOSTING LOCAL TOURISM

## TREND 2

THE LATEST HUB FOR GLOBAL SPORTING EVENTS.



## TREND 4

EDUTAINMENT: THE ART OF LEARNING VIA FUN



## TREND 6

UNSTOPPABLE SURGE IN GAMING & ESPORTS



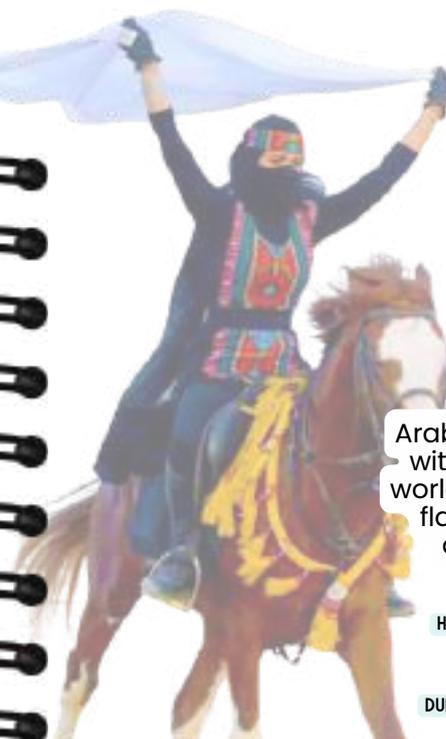
## TREND 8

EMERGING HEALTH & WELLNESS TOURSIM



## TREND 1

# Cultural Celebrations Galore



### CULTURAL FESTIVALS

Arab cultural fiesta mixes tradition with a modern twist to draw in a worldwide crowd, flaunting cultural flair, buzzing community vibes, and giving tourism and the economy a high-five!

HISTORIC JEDDAH FESTIVAL AL DHAFRA FESTIVAL

RIYADH SPRING FESTIVAL

DUBAI SHOPPING FESTIVAL AL JANADRIYAH FESTIVAL

Arab culture, poetry recitals, craft exhibitions, and a **“cultural incubator”** – **this is the Souk Okaz Festival**. Popularly known as the cultural heartbeat of Taif, this festival is one with cultural significance that transcends borders.

### CONTEMPORARY EVENTS

Events in the Middle East showcase local and international brands, reflecting the region's commitment to fostering creativity and innovation, signifying progress in cultural expression.



**Saudi Arabia's Fashion Futures** is a three-day event that provides a platform for Saudi designers and brands to showcase and sell their products.

### SEASONAL CELEBRATIONS...

These celebrations reposition middle east as a vibrant, dynamic destination that defies stereotypical views by showcasing its green landscapes, historical sites, and a burgeoning entertainment industry.

RED SEA INTERNATIONAL FILM FESTIVAL

WINTER AT TANTORA

RIYADH SEASON

BALAD BEAST

SOLE DXB

**MDLBEAST Soundstorm**

The electronic music festival, with a spectrum of regional and international artists



## TREND 2

# The Latest Hub for Global Sporting Events



The **Saudi Arabia F1 race** is one of the most exciting events in the world of motorsports, held on the Jeddah Street Circuit, a brand new track that promises to be one of the fastest and most challenging courses on the F1 calendar.

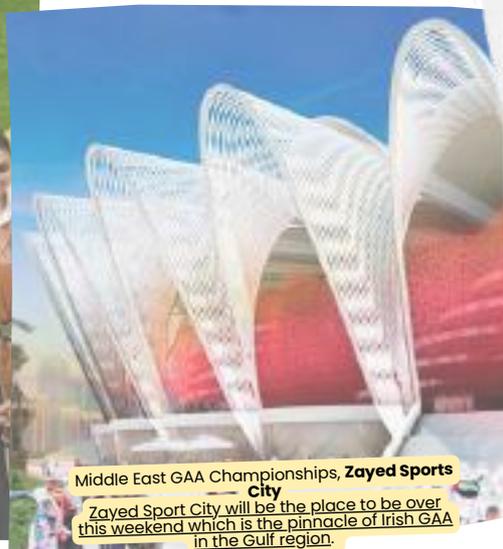
This intense focus on sporting events highlights Middle east's strategic aim to enhance its global standing as a sports hub, **attract tourism**, and create a **dynamic environment** for both residents and visitors, **offering something for fans of speed, strategy, and endurance alike.**



2027 Saudi Games Countdown in Riyadh is the Kingdom's largest sporting event starts



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Middle East GAA Championships, **Zayed Sports City** will be the place to be over this weekend which is the pinnacle of Irish GAA in the Gulf region.



**WWE Super Showdown** kicks off in Jeddah

## TREND 3

## Unique and Gourmet F&B Experiences

In MENA, a surge in experiential dining is merging food and beverage with entertainment, creating '**dinnertainment**' venues that offer interactive experiences like bowling and gaming. This trend, previously targeting children, is now attracting adults with affordably priced, diverse culinary options.

Additionally, there is a growth in pop-up F&B concepts that cater to the increasing popularity of face-to-face events and outdoor activities. These include street stalls, kiosks, and express take-out areas, as well as gourmet options served from chef-driven, curb side pick-up trucks that specialize in high-quality, authentic artisanal foods.



ROSHN Front comprises a mixed-use lifestyle retail and F&B destination, which welcomes more than 10 million visitors annually, and a commercial district that features world-class workspaces. Features of the development include 1 km of walking



Love Vibe by Bishop Design: Emirati influences and rich textures create a sophisticated ambience



Bujairi Terrace in Riyadh, a collection of 21 globally renowned restaurants over a 15,000 square metre area, is officially open. The historical area and the birthplace of the Kingdom houses the exciting new restaurant hub and meshes together rich culture, modernity and some seriously good grub.

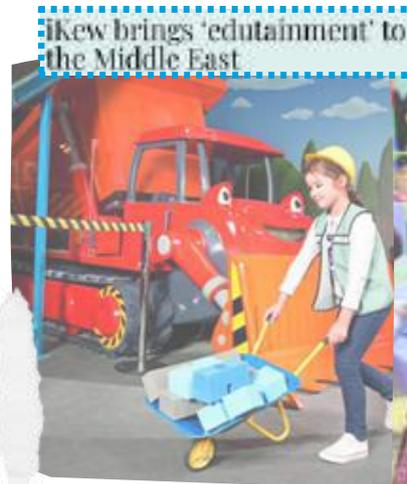
## TREND 4

# Edutainment: the Art of Learning via Fun

Edutainment, the **blend of educational content and entertaining experiences**, has become a cornerstone in the tourism industry, particularly for family events. It capitalizes on the understanding that learning can be engaging and fun.



Over the course of 179 days, Expo 2023 Doha will presented a variety of exciting events and activities, including conferences and cultural, educational, entertainment exhibitions.



iKew brings 'edutainment' to the Middle East



OSN partners with leading Arabic children's edutainment platform, Lamsa



Jeddah Season introduces new edutainment events



IMG Worlds of Adventure is a vast indoor theme park that covers four zones which include Cartoon Network & Marvel lands

## TREND 5

# Continued growth in Digital Entertainment

Digital entertainment led by OTT video, gaming and digital music will grow at an accelerated pace to 2024.

### STREAMING PLATFORMS DOMINATE:

The introduction of streaming services has significantly transformed the media scene. Accessible internet and a tech-oriented demographic have made services like **Netflix, Shahid, and StarzPlay** highly popular. These platforms provide a mix of local and international content, appealing to diverse tastes.



### IMPACT OF SOCIAL MEDIA:

Social media has become a crucial channel for content distribution. Platforms like **Instagram** and **Twitter** allow for **engaging visual content** and real-time interaction. **Influencers and creators** use these spaces to connect with audiences, which makes the region a thriving space for social media trends.



### BALANCING MODERNITY AND TRADITION

**Content creators are innovatively blending contemporary narratives with traditional cultural elements.** This balance is attracting attention from both local and international audiences, underscoring the unique appeal of Middle Eastern media content.



### Cinema revenue will continue to shine



### MENA digital recorded music and podcast revenues(US\$bn)



### DEMAND FOR LOCALIZED CONTENT:

There is a growing preference for media that **mirrors local cultures, languages, and stories.** Production companies are thus creating more original Arabic content, which meets the cultural demands of the audience.

## TREND 6

# Unstoppable surge in Gaming & eSports

**A Hub for Gaming Enthusiasts** – Gaming industry in the Middle East is growing leading to integrated gaming experiences. This transformation creates opportunities for advertisers to engage with a diverse audience through in-game advertising and mobile gaming.



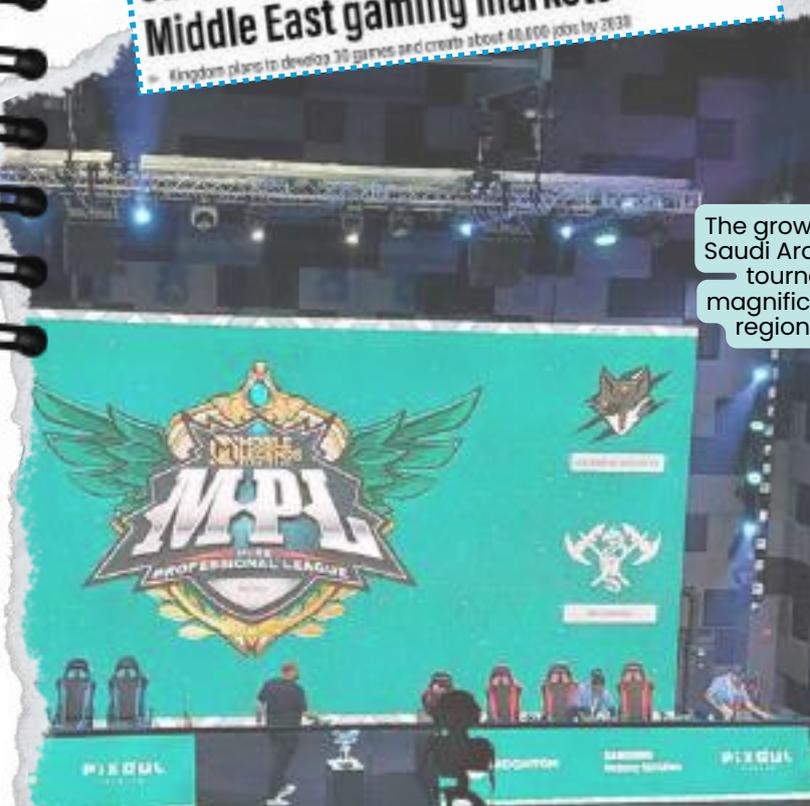
They are a new genre of sportspeople – **esports “athletes”** – from a discipline that is one of the fastest growing in the world.

From Dunes To Virtual Arenas: the Rise Of Esports In MENA



**“Savvy Games Group** is one part of our ambitious strategy aiming to make Saudi Arabia the ultimate global hub for the games and esports sector by 2030,” Crown **Prince Mohammed bin Salman** said, according to SPA.

Saudi Arabia and UAE emerging as key Middle East gaming markets  
 Kingdom plans to develop 30 games and create about 40,000 jobs by 2030



The growing popularity of esports in the MENA region, especially in Saudi Arabia and the UAE, has been remarkable. From captivating tournaments like **the Esports World Cup in Saudi Arabia** to magnificent sporting events in the **Dubai World Trade Centre**, the region has embraced competitive gaming with unparalleled enthusiasm.



MPL Mena Spring 2023 finals (left) and Dubai GameExpo Summit (right)

## TREND 7

# Boosting Local Tourism

The Leisure & Entertainment sector in the UAE and KSA is growing, leading to more residents opting to stay in their countries for summer activities. YouGov data shows that 71% of residents plan to spend more time domestically during the hotter months. This growth is turning both countries into year-round destinations for residents and tourists, with KSA experiencing a more significant impact than the UAE.



**Wadi Disah in Tabuk**, has it all in one, sand dunes, rocky landscapes and beach shores



**Dubai: The Nest by Sonara**  
An extension of the dazzling desert dinner experience, Sonara, The Nest is roughly five minutes drive from Sonara Camp, with each sand hued dome complete with its own ensuite bathroom with a shower and double sink.



**Longbeach Campground in Ras al Khaimah** is one of the most unique retreats for adventure, wellness, and nature.

**Growth in the L&E sector is a major reason for residents to spend more time in their country of residence**



**The Nofa Resort**, just outside Riyadh boasts 57 bungalows and villas in a dreamy environment.

HOSPITALITY

**Staycations 'on the rise in the UAE'**

Strong year-on-year growth in Airbnb summer bookings, with Ras Al Khaimah witnessing the largest percentage growth

Staff Writer, TradeArabia

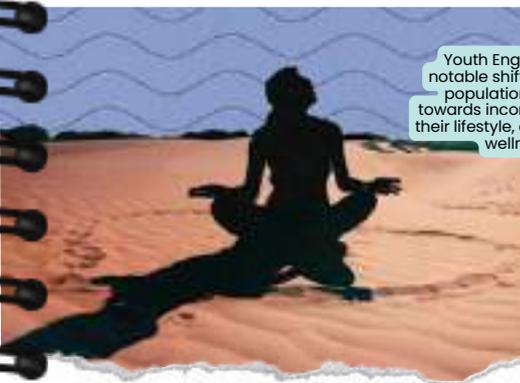


## TREND 8

# Emerging Health and Wellness Tourism

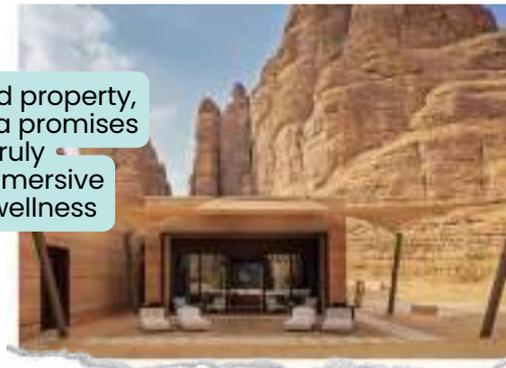
The Middle East and North Africa are experiencing the fastest growth in wellness tourism revenues, making up 18% of the market in 2022, with an expected global market value of \$1.3 trillion by 2025.

The Middle East's natural landscapes, cultural richness, and historical significance make it a desirable wellness destination. Its strategic position as a global travel hub also enhances its accessibility.



Youth Engagement: There's a notable shift among the younger population in the Middle East towards incorporating wellness into their lifestyle, driving the demand for wellness solutions.

Wellness-focused property, Banyan Tree AiUla promises guests a truly holistic and immersive approach to wellness



Oman's Six Senses Ziggy Bay delivers a range of wellness programmes including one focused on sleep enhancement



Amaala's Clinique La Prairie will be the most important health and longevity-focused resort ever developed

**ME Time: Make the Middle East your next wellness destination**

**Wellness tourism is flourishing. And the Middle East seems to be ready**  
Wellness tourism is evolving, attracting global travelers in search of relaxation and rejuvenation



# Mind-the-Gap

Here is a snapshot of the generational mindsets to help better connect with them...

## BABY BOOMERS (1946 - 1964)



This generation connects with cultural festivals and enjoy leisure activities that involve socializing with extended family, dining out or attending community events. They enjoy events like Janadriyah, experiences at Riyadh Seasons or Dubai Racing Cup, visiting cultural & historical places like Al-Ula, Diriyah, etc.

Gen Xers often balance family and career, so they look for leisure activities that are family-friendly and offer a break from work. This includes visiting malls, watching movies, attending sporting events, participating in outdoor activities like picnics or short trips. They enjoy going to events like Film Festivals, Golf Tournaments, Tennis & Football events.



## GEN X (1965 - 1980)

## GEN Y (1981 - 1996)



This group tends to favor experiences and seek unique entertainment options like music festivals, adventure sports, or travel experiences. They also enjoy digital entertainment or streaming services. They love Winter at Tantora, adventure rides, amusement parks, Comic Con, sporting events like Dakar Rally, Italian Super Cup, Comic Con.

Gen Z is highly connected and tech-savvy, and are drawn to digital entertainment, including social media, online gaming, and virtual reality experiences. They also tend to support causes and enjoy events that promote sustainability and social justice.



## GEN Z (1997 - 2012)

## GEN ALPHA (2012 onwards)



While still very young, Generation Alpha are the most tech-integrated. Their entertainment needs include interactive and educational digital content, augmented reality experiences, and family-oriented activities that incorporate technology. For them the region has plenty of leisure & entertainment options on offer - Formula E Diriyah E-Prix, gaming meets and contests - Gamers Without Borders, Saudi eLeague, Nexus Festival, The PUBG Mobile Star Challenge (PMSC) as well as the ultimate techno and trance musical experience MDL Beast!!

OUR

# 4SiGHT Live Suite



## **PANEL UAE | KSA**

Our pre-recruited ahead-of-the-curve panel for quick, cost-efficient research needs, offering a window into live data.



## **COMMUNITIES**

Designed to build an agile system to conduct research while keeping the customer at the heart of the business.  
Enables clients to make consumer relevant decisions by testing on the go.



## **CONSUMER CONNECTS**

4SiGHT's solution to curate and build a customized calendar of immersive interviews for client teams to get the pulse of the consumer.  
Available as ad-hoc & annual programs.

For more information, contact [info@4sight-global.com](mailto:info@4sight-global.com)

OUR

# Research Tools

## INSIGHT EXPRESS

Enables swift and efficient innovation testing, minimizing the risks linked to a comprehensive launch - allowing you explore, experiment, and fail cheap.

## AASMA | CHATBOT

Facilitates interactive conversations with consumers, streamlining the process of filling consumption/usage diaries. Leading to improved efficiency and quality of data collection.

## SPRINT+

Provides an innovative boost to your iterative process by making it more AGILE through co-creation workshops, giving wings to potential ideas/improvements

For more information, contact [info@4sight-global.com](mailto:info@4sight-global.com)

OUR

# Calendar



## **JANUARY 2024**

### **TRENDS SHAPING OUR REGION**

<https://4sightglobal.com/wp-content/uploads/2024/02/4SiGHT-for-Growth-Trends-shaping-our-region-Jan-24.pdf>

## **FEBRUARY 2024**

### **RAMADAN IN THE POST PANDEMIC ERA**

<https://4sightglobal.com/wp-content/uploads/2024/03/4SiGHT-for-Growth-Ramadan-in-post-pandemic-era-Feb-24.pdf>

## **MARCH 2024**

### **EVOLVING LANDSCAPE OF LEISURE & ENTERTAINMENT**

## **APRIL 2024**

### **COMING SOON: CUSTOMER EXPERIENCE**

For more information, contact [info@4sight-global.com](mailto:info@4sight-global.com)