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MENA LEISURE REPORT 2025



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17
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مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي
Middle East and North Africa Leisure & Attractions Council

Message from the Board of Directors

MENA Leisure Report 2025: Benchmarking Trends Shaping Regional Success

The MENA Leisure Report 2025 has been created to act as a vital and transformative resource for the Middle East & North Africa (MENA) region's leisure & entertainment industry offering consolidated data, expert analyses and insights to guide strategic decision-making.

More than just a publication, the report is seen as a catalyst for industry-wide progress, empowering businesses to identify growth opportunities, adapt to evolving market trends and foster sustainable development.

The report highlights emerging trends reshaping the landscape, rapid shifts in consumer behaviour driving innovation and sustainability initiatives integrating purpose and profitability. Importantly, the report highlights significant investment opportunities across key segments including indoor entertainment centres, theme parks, water parks, cultural & visitor attractions, cinemas, live entertainment and shopping centres.

As countries like the Egypt, Morocco, Oman, Saudi Arabia and the UAE, among others invest heavily in tourism and entertainment to diversify their economies, the MENA Leisure Report serves as an effective guide for stakeholders aiming to navigate this fast-changing industry. It is designed not only for seasoned industry leaders but also for new investors and decision-makers seeking to capitalise on the region's immense potential.

By delivering this report, MENALAC's leadership underscores a collective commitment to elevating the industry, creating family-friendly experiences and building an inclusive and sustainable future for communities across the region.

MENALAC Board of Directors

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Middle East and North Africa Leisure & Attractions Council

كلمة مجلس الإدارة

مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي (مينالاك)

تقرير الترفيه لمنطقة الشرق الأوسط وشمال أفريقيا 2025: اتجاهات مرجعية معيارية ترسم ملامح النجاح في المنطقة

لقد أعددنا "تقرير الترفيه لمنطقة الشرق الأوسط وشمال أفريقيا 2025" ليكون مرجعاً مهماً ومحفّزاً لتحقيق التحول المنشود في صناعة الترفيه في منطقتنا، إذ يقدم بيانات موحدة وتحليلات خبراء ورؤى متعمقة تدعم صنع القرارات الاستراتيجية. فالتقرير ليس مجرد إصدار معلوماتي، بل هو عامل محفز للتقدم في القطاع، يُمكّن الشركات من تحديد فرص النمو، ومواكبة تحولات السوق، وتعزيز التنمية المستدامة.

يسلّط التقرير الضوء على الاتجاهات الناشئة التي تعيد تشكيل مسارات الصناعة، والتحولات السريعة في سلوك المستهلكين التي تدفع الابتكار، ومبادرات الاستدامة التي توازن بين تحقيق الهدف واكتساب الربحية. كما يستعرض فرص الاستثمار البارزة في قطاعات أساسية تشمل مراكز الترفيه الداخلية، ومدن الملاهي، والمتنزهات المائية، والمعالم الثقافية والسياحية، ودور السينما، والعروض الحية، ومراكز التسوق، وما إلى ذلك من أنشطة.

مع توجّه دول مثل مصر والمغرب وعُمان والمملكة العربية السعودية ودولة الإمارات العربية المتحدة وغيرها من الدول إلى ضخ استثمارات كبيرة في السياحة والترفيه لتنويع مصادر اقتصاداتها، يأتي إصدار التقرير ليكون دليلاً مرشداً فعّالاً لأصحاب المصلحة والأطراف المعنية في سعيهم إلى فهم صناعة تتغير ملامحها بوتيرة متسارعة. وقد صممنا محتواه ليناسب قادة القطاع المخضرمين والمستثمرين الجدد وصنّاع القرار الراغبين في استثمار الإمكانات الهائلة للمنطقة.

من خلال إصدار هذا التقرير، تؤكد قيادة مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي (مينالاك) التزامها الجماعي بالنهوض بالقطاع، وتوفير تجارب عائلية ثرية، وبناء مستقبل شامل ومستدام لمجتمعات دول المنطقة.

إدارة مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي (مينالاك)

Message from the Chair of the MENA Leisure Report Committee



Dear Industry Colleagues,

It gives me immense joy to share with you the second edition of the MENA Leisure Report 2025.

The MENA region stands at the forefront of a dynamic and rapidly evolving leisure and entertainment industry that is driven by ambitious national visions to grow the non-oil economy, substantial state investments and growing demand for diverse experiences that attract both regional & international tourism to the region. This strategic shift is translating as unparalleled opportunities for investors, developers and operators.

The need for **real, validated, region-specific data** has never been more relevant, particularly given the developments redefining the MENA leisure landscape.

Following the success of the first edition in 2021, which drew largely on pre-COVID data, the Board of Directors of MENALAC authorized this updated second edition, reflecting new market information and benchmark trends shaping the industry in the post-pandemic era.

MENA Leisure Report 2025 is an essential resource for industry stakeholders. It features updated demographic and macroeconomic data per MENA country, tourism and hospitality insights, consumer sentiment surveys, opinion pieces from industry leaders, status reports across segments, details on upcoming key infrastructure and leisure projects, and much more.

A notable highlight, especially for operators, is the 2024 Industry Operators Benchmark Survey, which is a reflection on how our industry fared in 2024 and captures the key trends that shaped our industry in said year.

This survey, devised by industry professionals to elicit truly relevant and actionable data/benchmarks for the industry, results as an industry trend report for type and size of operations, year-on-year revenue growth, typical expense streams, operational parameters, human resource patterns, CEO insights, and more.

For too long, insights into our industry have come from agencies who are disconnected from ground realities. This second edition helps change that narrative, giving the MENA region a voice with its own data.

Building on learnings from our first publication, we have introduced sharper indicators and practical benchmarks to help operators, investors, and developers with information that is practical, region relevant, and that serves as a benchmark to size their investment or to measure the performance of their existing operations.

As the Chair of the Committee overseeing the realization of the report, I would like to thank all our industry partners for their time and contribution, for offering insight and expertise on the nuances of their operations, and for sharing their data for the greater good of our industry. Special thanks to UHY James Advisory LLC, and Neha Jain, who worked tirelessly with me over the last 8 months on all aspects of this report, as well as the team at Misonika and the fantastic team at MENALAC for their stupendous efforts to bring the 2nd Edition of this report to life.

At its core, this **MENA Leisure Report 2025** is more than just a publication, it reflects what can be achieved when we move from competition to contribution.

We hope this report serves as a valuable guide as you navigate the MENA leisure industry and supports your continued success in shaping the future of recreation, tourism, and entertainment in our region.

Warm Regards,

Prakash Vivekanand
MENALAC Board Member
Chair of the MENA Leisure Report Committee



كلمة رئيس لجنة تقرير مينالاك للترفيه في منطقة الشرق الأوسط وشمال إفريقيا

الزملاء الأعزاء في القطاع،

يسعدني كثيراً أن أشارككم الإصدار الثاني من **"تقرير الترفيه لمنطقة الشرق الأوسط وشمال أفريقيا 2025" (MENA Leisure Report 2025)**.

تقف منطقتنا اليوم في طليعة صناعة الترفيه والتسلية التي تشهد تطوّراً متسارعاً، تقوده رؤى وطنية طموحة لتنمية الاقتصاد غير النفطي، واستثمارات حكومية ضخمة، وطلب متزايد على تجارب متنوعة تستقطب السياحة الإقليمية والدولية. ويفتح هذا التحول الاستراتيجي فرصاً غير مسبوقة أمام المستثمرين والمطورين والمشغلين.

أضحى توفر بيانات حقيقية وموثوقة خاصة بالمنطقة أكثر أهمية من أي وقت مضى، لا سيما في ظل التطورات التي تعيد رسم مشهد صناعة الترفيه في الشرق الأوسط وشمال أفريقيا. وبعد نجاح الإصدار الأول من التقرير عام 2021، الذي استند إلى بيانات ما قبل جائحة كوفيد- ١٩ وافق مجلس إدارة "مينالاك" على إصدار هذا التحديث الثاني، الذي يعكس معلومات جديدة واتجاهات معيارية عن السوق تحدد وضع هذه الصناعة في مرحلة ما بعد الجائحة.

يُعد "تقرير الترفيه 2025" مرجعاً أساسياً لأصحاب المصلحة والأطراف المعنية بالقطاع؛ إذ يضم بيانات سكانية واقتصادية محدَّثة لكل دولة في المنطقة، ورؤى حول السياحة والضيافة، واستطلاعات ثقة المستهلك، ومقالات رأي لرواد القطاع، وتقارير حالة عبر مختلف الشرائح، وتفاصيل عن مشروعات البنية التحتية والترفيه المقبلة، وغير ذلك الكثير من البيانات والمعلومات.

من أبرز محتويات التقرير، وبالأخص للمشغلين، "استبيان المقارنة المعيارية لمشغّلي القطاع لعام 2024"، الذي يرصد أداء الصناعة في عام 2024، ويوثق الاتجاهات الرئيسة التي شكلت مسارنا خلال ذلك العام.

يقدم هذا الاستبيان، الذي أعده خبراء القطاع بهدف استخلاص بيانات قابلة للتطبيق، تقريراً عن اتجاهات الصناعة وفق نوع العمليات وحجمها، ونمو الإيرادات سنة بعد أخرى، وهيكل المصروفات المعتاد، ومعايير التشغيل، وأنماط الموارد البشرية، ورؤى الرؤساء التنفيذيين، وغير ذلك من المدخلات.

لطالما استُمدّت الرؤى المتعلقة بصناعتنا من جهات لا تلامس الواقع الفعلي؛ ويسهم هذا الإصدار الثاني في تغيير هذه الصورة بمنح المنطقة صوتاً يستند إلى بياناتها الخاصة.

بناءً على الدروس المستفادة من الإصدار الأول، أضفنا مؤشرات أكثر دقة ومقاييس عملية تساعد المشغّلين والمستثمرين والمطورين بمعلومات متوافقة مع خصوصية المنطقة، وتشكل معياراً لقياس حجم استثماراتهم أو تقييم أداء عملياتهم القائمة.

بصفتي رئيس اللجنة المشرفة على إعداد التقرير، أتوجه بالشكر إلى جميع شركائنا في القطاع على وقتهم ومساهماتهم، وتقديمهم الرؤى والخبرات حول تفاصيل عملياتهم، ومشاركتهم بياناتهم لما فيه خير صناعتنا. وأخصّ بالشكر شركة UHY James Advisory LLC، ونيها جاين، على عملهما الدؤوب معي طوال الأشهر الثمانية الماضية في إعداد وتحرير جميع جوانب هذا التقرير، إضافة إلى فريق العمل في شركة Misonika، وفريق "مينالاك" الرائع، على جهودهم المتميزة لإصدار النسخة الثانية من هذا التقرير.

يمثّل "تقرير الترفيه لمنطقة الشرق الأوسط وشمال أفريقيا 2025" في جوهره أكثر من مجرد إصدار؛ فهو دليل على ما يمكن تحقيقه حين ننتقل من مرحلة التنافس إلى هدف الإسهام الإيجابي.

نأمل أن يكون هذا التقرير دليلاً قيّماً يدعم نجاحكم المتواصل في رسم مستقبل الترفيه والسياحة في منطقتنا.

أطيب الأمنيات،

براكاش فيفيكاناند

عضو مجلس إدارة مينالاك

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EDITOR'S NOTE



How Data is Powering MENA's Leisure Economy

Rupkatha Bhowmick
Editor, MENA Leisure Report 2025

As we turn the pages of the MENA Leisure Report 2025, I find myself reflecting on how far the region's amusement, attractions and entertainment sector has come and how much potential lies ahead.

When MENALAC (the Middle East and North Africa Leisure & Attractions Council) first envisioned this report, the goal was simple: to create an honest, data-rich and forward-looking picture of the industry that they are so passionate about. What you now hold is the result of months of collaboration, insights gathering and a shared commitment to spotlighting a sector that's becoming one of the most exciting growth stories in the region.

The numbers speak volumes. The MENA leisure and entertainment market is expected to hit the $14-billion-mark by 2028, driven by demographic shifts, rising disposable income and a growing appetite for experiences and memories. And this is just the beginning! From the ever-so-popular and beloved homegrown indoor entertainment centres to mega theme parks, the region is embracing leisure as both a cultural force and an economic engine.

Take Saudi Arabia, for example. It's not just building attractions; it's building ambition. Under the Saudi Vision 2030, high profile projects such as Six Flags Qiddiya and SEVEN (Saudi Entertainment Ventures) theme parks are gaining global attention. The goal of these projects is to welcome 150 million visitors to KSA by 2030.

The United Arab Emirates (UAE) continues to reinforce its status as a leading leisure destination, aiming to attract 40 million tourist footfalls by 2030, injecting $100 billion into the economy. The already strong inflow of tourism revenue is fuelling rapid growth in the country's leisure sector, driving investments in new attractions and the enhancement of existing ones. Speaking about new attractions, as we were putting the final touches before sending this book for printing, a major announcement broke about Miral's collaboration with The Walt Disney Company to launch the first-ever Disney theme park and waterfront resort in the MENA region. Codenamed "Project Mars," the park promises to creatively integrate Disney storytelling with Emirati culture.

Similarly, Qatar's recent developments including the opening of the Meryal Waterpark and the upcoming Simaisma Project – that will feature a theme park, an 18-hole golf course and luxury resorts – underscore the nation's commitment to enhancing its leisure offerings. Known for its deep historical and cultural heritage and strategic location, Egypt is also set to see strong growth in its leisure sector supported by reforms and investments in tourism infrastructure.

Evidently, tourism is proving to be the ultimate catalyst. With the region drawing more than 87 million international tourists in recent years – and this figure is on an upward curve – the demand for high-quality, immersive leisure experiences has never been stronger. From being considered as 'add-on' features, leisure & entertainment is now at the core of national tourism strategies.

It's not just about the numbers; it's also about the impact. The regional leisure & entertainment sector is creating jobs, encouraging entrepreneurship and giving families and young people across the MENA region new ways to connect, create memories, celebrate their cultures while have fun.

One of the things I have come to appreciate while working on this report is the understanding that data can reveal trends thereby setting benchmarks to define a new purpose. This report offers the hard stats and projections such as per capita spending on leisure and how social entertainment concepts are booming, as well as the narratives of reinvention, resilience and regional collaboration.

In this report, you will read about how technology is transforming experiences, how homegrown concepts are rubbing shoulders with intellectual property (IP) based attractions and how consumer demand is shifting towards interactivity and personalisation. Operators are no longer just building rides; they're building memories.

The growth opportunities for the industry are real, but so are the challenges. From navigating economic headwinds to adapting to shifting consumer behaviour, the road ahead demands agility, creativity, innovation and partnership. If there's one thing this report makes clear, it's that the region is ready not just to grow, but to lead.

This report is more than just a snapshot of where the industry is at; it's a map of where its headed. The MENA Leisure Report 2025 serves as a platform to spotlight key industry players, celebrate innovation and support every stakeholders – from investors and operators to developers and government bodies – on the path to building a more dynamic, connected and inclusive leisure ecosystem.

I would like to thank the partners, contributors, the entire MENALAC community and team Misonika for your insights, support, candour and shared belief in the power of fun.

As you explore the MENA Leisure Report 2025, I invite you to do so not just as a reader, but as a stakeholder in the journey because this isn't just MENA's leisure story; it's yours too.

Here's to building the future of fun, together.

MENA LEISURE REPORT 2025

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Rendered image of aerial view of Saadiyat Cultural District, Abu Dhabi

VISION ARTICLE

Building a Legacy: How Miral is Redefining the Region's Leisure and Entertainment Landscape



By **Mohamed Abdalla Al Zaabi**
Group CEO, Miral

The global leisure and entertainment landscape is in constant flux, driven by evolving consumer behaviours, technological breakthroughs and a growing demand for immersive experiences. In this ever-changing landscape, the MENA region is emerging as a formidable global player, setting new standards and redefining the industry's future. At Miral, we are not merely developing attractions; we are crafting immersive experiences that redefine the very notion of joy. We create unforgettable memories while setting new industry benchmarks, a legacy that is transforming Abu Dhabi into a leading world-class leisure and entertainment destination.

A decade ago, Yas Island was a blank canvas; today, it stands as a powerhouse of leisure and entertainment, home to record-breaking attractions that captivate millions of visitors.

What began as an ambitious vision of the UAE's leadership has materialised into a globally recognised destination. A decade ago, Yas Island was a blank canvas; today, it stands as a powerhouse of leisure and entertainment, home to record-breaking attractions that captivate millions of visitors. From the pulse-racing roller coasters of Ferrari World Yas Island and Warner Bros. World™ Yas Island, the region's largest indoor theme park, to SeaWorld Yas Island, Abu Dhabi, the world's largest indoor marine-life theme park, each project is a testament to Miral's commitment to innovation, storytelling, and excellence.

Strategic partnerships with global intellectual properties (IPs) have played a vital role in shaping Yas Island's success.

Renowned brands, such as Warner Bros., Ferrari and SeaWorld, have captivated visitors from around the world



Yas Island, Abu Dhabi


teamLab Phenomena, Abu Dhabi

with the introduction of first-of-their-kind experiences in Abu Dhabi. These partnerships not only enhance guest experiences but also reinforce Abu Dhabi's position as a premier destination for world-class entertainment. The upcoming Harry Potter-themed land at Warner Bros. World ™ Yas Island, and the expansion of Yas Waterworld underscore our relentless pursuit of creativity and pioneering experiences that continue to set new industry benchmarks.

Yet, we still have a lot to do. The Yas Island Metaverse project, developed in collaboration with e& enterprise, will take business engagement and visitor exploration to an entirely new level, allowing potential partners to immerse themselves in Yas Island's offerings before they even set foot on the Island. It's a bold step into the future—one that cements Yas Island's position as a global leader in experiential innovation.


Louvre Abu Dhabi

Miral's contributions extend far beyond thrilling rides and attractions. Our projects align seamlessly with Abu Dhabi's Vision, reinforcing economic diversification and solidifying the emirate's status as a leading global tourism destination.

Yas Island and Saadiyat Island have been pivotal in driving record-breaking tourism growth. During the summer of 2024 alone, Yas Island's theme parks saw a 72% increase in visitation from the GCC, a 24% rise in Indian visitors and 83% overall occupancy rate.

Cultural landmarks across Abu Dhabi are also shaping the emirate's tourism vision. Coupled with Miral's ability to attract global IPs, and in partnership with the Department of Culture and Tourism – Abu Dhabi (DCT Abu Dhabi), highly anticipated cultural attractions on Saadiyat Island – including teamLab Phenomena Abu Dhabi, an immersive multi-sensory art experience, and the Natural History Museum Abu Dhabi, are set to be the largest of its kind in the region. These further demonstrate Miral's role in shaping Abu Dhabi's tourism landscape. Furthermore, and following our destination management success on Yas Island, two years ago Miral was appointed by DCT-Abu Dhabi to manage the destinations on Saadiyat Island. Our efforts have achieved significant results, recording a 65% hotel occupancy rate during the summer of 2024, representing a 13% increase compared to 2023 and underscoring the islands' growing appeal.

World-renowned events also play a major role in Abu Dhabi's vibrant tourism offerings. Award-winning musical and entertainment spectacles, such as Abu Dhabi Comedy

Week, The Lion King, Chicago The Musical, Disney on Ice, Cirque Du Soleil and others offer unforgettable experiences for a wide variety of audiences. Additionally, sporting events have become a cornerstone of the region's entertainment ecosystem, attracting fans from around the world. Yas Island's exciting sporting line-up, including Formula 1 Etihad Airways Abu Dhabi Grand Prix, NBA Abu Dhabi Games and UFC Abu Dhabi, reflect our strategic efforts in positioning Abu Dhabi as a leading global destination for entertainment and leisure.

But we know we can't stop there. Travellers today, particularly millennials and Gen Z, crave more than just rides. They seek personalised, interactive experiences that blur the lines between reality and fantasy. This understanding has shaped our strategy, leading us to embrace emerging technologies such as artificial intelligence (AI) and virtual reality (VR) to conceptualise and bring to life even more captivating experiences.

In a world where digital integration is redefining leisure experiences, Miral is leading the charge. Our contactless technology, FacePass, has revolutionised visitor interactions, enabling seamless access to our attractions. With over a million registrations and thousands of annual passes linked to FaceID, we are setting new industry benchmarks. Meanwhile, our AI-powered customer service, integrated with ChatGPT through our partnership with Microsoft, has already completed over 50,000 operations, ensuring a smooth and personalised guest experience.



Slither's Ride, Yas Waterworld Yas Island, Abu Dhabi

At the core of this transformation is Noor, Miral's mega-data transformation programme, which is enabling data-driven decision-making, hyper-personalised experiences and operational efficiencies. By leveraging cutting-edge analytics and AI, Noor is shaping the future of how we engage with visitors, ensuring that every interaction is seamless, intuitive and impactful.

As we look to the future, our focus extends beyond business success. We recently launched our Sustainability Strategy that underscores our commitment to responsible growth—one that protects the environment, enhances employee well-being and fosters community engagement. In alignment with the UAE's 'Year of Community 2025', we are integrating community-driven initiatives into our strategic roadmap, ensuring that our legacy benefits the future generations.



Warner Bros. World™ Yas Island, Abu Dhabi



Yas Waterworld Abu Dhabi

> *“It’s worth mentioning that one of the most exciting developments on the horizon is the introduction of a unified GCC visa. This transformative initiative is set to boost the region’s cross-border tourism, streamline travel and unlock new economic opportunities.”*

As the region becomes more interconnected, each country will have the opportunity to leverage innovation and collaboration to enhance visitor experiences. This milestone will not only drive economic growth but also cement the GCC’s legacy as a leading hub for global tourism.



CLYMB, Abu Dhabi

At Miral, we are not just creating entertainment destinations, we are shaping the future of leisure and tourism in the region.

By embracing innovation, sustainability and world-class partnerships, we are ensuring that Abu Dhabi stands at the forefront of the global leisure and entertainment industry. The journey ahead is filled with boundless opportunities, and we are excited to continue redefining what’s possible, leaving an enduring legacy for generations to come.

About the Author

Dr. Mohamed Abdalla Al Zaabi is the Group CEO of Miral and a visionary leader in the regional leisure, entertainment and tourism sector. Since joining in 2015, he has transformed Miral into a global destination, driving the success of Yas Island and expanding to Saadiyat Island. Under his leadership, Miral has delivered world-class attractions in partnership with brands including Ferrari, SeaWorld and Warner Bros., supporting Abu Dhabi’s economic diversification. Al Zaabi also serves as Chairman of Miral Destinations and sits on multiple boards. In 2024, he was named one of Forbes Middle East’s Top 10 Travel & Tourism Leaders.

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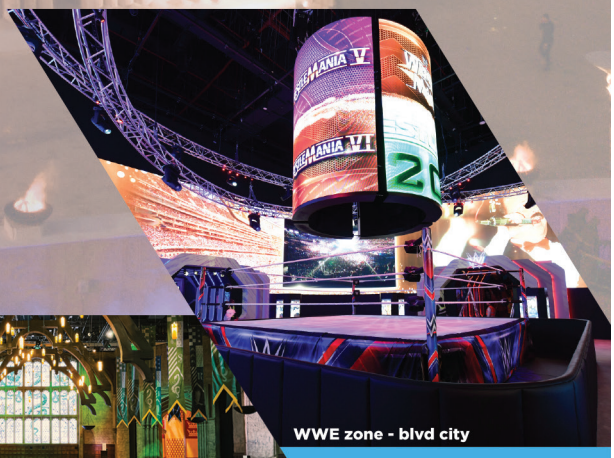
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DIAMOND ADVERTISER FEATURE

The New Frontier: How KSA is Redefining Fun & Culture



Fahad Al Obailan
Group CEO, BAAN Holding Group

The entertainment and leisure industry in the MENA region is undergoing a remarkable transformation. Driven by a young, tech-savvy population, evolving consumer expectations and significant investments from both government and private sectors, the industry has become a vital engine of economic growth and cultural vitality. From family entertainment centres (FECs) to immersive digital experiences, the region is steadily carving out its place on the global stage.

Saudi Arabia is at the forefront of this transformation, guided by the ambitious Vision 2030 roadmap. The Kingdom is redefining entertainment as a national asset, infused with purpose, ambition and economic significance. As government-led initiatives accelerate growth across infrastructure, tourism and the creative sectors, Saudi Arabia is rapidly emerging as a global hub for innovation, partnership and local talent development.

At BAAN Holding Group, we are proud to play a key role in this movement. Our portfolio spans hospitality, food & large-scale catering, retail and family entertainment. In alignment with Vision 2030, our mission is centred on unlocking economic potential, enabling social progress and creating job opportunities throughout the region. For us, investments go beyond business; they help build a vibrant, inclusive and future-ready society.



Mission: Play! by Mattel

Our flagship entertainment centres, Sparky's and Snowy Forest, have established a strong presence across Saudi Arabia, the UAE and Egypt. These destinations offer family-friendly experiences tailored to local markets, reflecting our deep understanding of regional dynamics. Their success underscores our confidence in the region's potential and highlights our commitment to showcasing Saudi creativity and operational excellence on the global stage.

Building on this momentum, we have diversified our portfolio with exciting new concepts, including Sparky's Bowling, Laser Tag and Xtreme Trampoline – each designed to deliver high-energy, world-class entertainment. As part of our vision to bring global experiences to the MENA region, we have also added internationally recognised brands to our portfolio through strategic partnerships:

- **Playocity, in collaboration with Hasbro**
- **CoComelon Playdate**
- **Mission: Play! by Mattel**



PlayOcity

These initiatives extend beyond entertainment. They provide platforms to nurture and empower young talent from Saudi Arabia and the wider region, contributing meaningfully to the development of local human capital.

Our operations in the UAE and Egypt reflect our belief in the value of regional cooperation and knowledge exchange. Working across diverse markets allows us to enhance our offerings, localise experiences and share Saudi Arabia's innovative and cultural spirit with the world.

Looking ahead, BAAN Holding Group remains committed to continuous innovation, strategic partnerships and long-term impact. We view entertainment not only as a source of fun, but as a powerful tool for connection, education and economic growth. As Saudi Arabia moves closer to its vision of becoming a global entertainment hub, we are honoured to be part of this journey.

Together, we are building a legacy of creativity, opportunity and national pride that extends across the region.

STATUS OF THE INDUSTRY – THEME PARKS

Rides, Recovery, Resilience as MENA Theme Parks Gear Up for a New Era

The Middle East and North Africa (MENA) theme park industry is witnessing remarkable recovery post-COVID, showcasing resilience and renewed confidence driving significant developments across the region, indicate industry experts.

Grand View Research estimates the amusement parks market in the Middle East & Africa to touch approximately $12 billion by 2030, growing at a compound annual growth rate (CAGR) of 6% between 2025 and 2030. The estimate doesn't seem far off, as the market generated revenue worth $8.1 billion in 2024.

An increase in theme park visitations is driving up revenues. Offering a global perspective, the Themed Entertainment Association (TEA) and AECOM's 18th annual Theme Index and Museum Index 2023 report indicated that the top 25 theme parks worldwide collectively attracted 244.6 million visitors in 2023, up from 198.7 million in 2022.

"The industry has experienced a significant increase in attendance, driven by pent-up demand for leisure activities and the introduction of new attractions." - Antonio Zamperla



Antonio Zamperla

"Major operators like Six Flags reported strong financial results with notable increases in revenue and in-park spending per guest. However, some US parks reported softer attendance during the summer months, attributed to factors including increased international travel and inflation impacting consumer spending. But overall, in 2024, the global theme park industry continued its recovery from the COVID-19 pandemic, with revenues reaching approximately $71.4 billion up from $51.66 billion in 2023" shared **Antonio Zamperla**, Chief Executive Officer at Zamperla, a globally leading ride manufacturer.



Six Flags Qiddiya City

The TEA/AECOM report highlighted that the top 20 theme parks in the EMEA (Europe, Middle East, Africa) region drew 66.2 million visitors in 2023, an increase from 63.4 million in 2022. Notably, Warner Bros. World Abu Dhabi is the first Middle East based theme park to make it to AECOM's list of Top 20 Amusement / Theme Parks in EMEA for 2023, ranking 17th on the list with 1.75 million annual visitors. Interestingly, not far away from Warner Bros. World Abu Dhabi is SeaWorld Abu Dhabi that opened in May 2023 and managed to attract 1.3 million visitors within just seven months of operation.

Quoting the TEA/AECOM report, **Brian Machamer**, Park President – Six Flags & Aquarabia Qiddiya City said, ***"While attendance patterns vary by region, increased per capita spending and premium experiences have driven financial performance. That's why, at Six Flags Qiddiya City we're developing unique attractions such as Falcons Flight – the world's tallest, fastest and longest roller coaster – that will be a key component in driving our park's anticipated annual visitor capacity."***



Brian Machamer



Falcons Flight, Six Flags Qiddiya City

Visitor trends have been on an upward trajectory, agreed **Yawar Pasha**, Group Chief Financial Officer, IMG Worlds of Adventure – the largest indoor theme park in the UAE spread across 1.5 million square feet – and shared that IMG is recording growth in both domestic and international visitations.



Yawar Pasha


Doha Quest Theme Park

All three experts agreed that the regional theme park industry is expanding, fuelled by large-scale projects and rising demand for leisure tourism. The UAE is leading this list with an impressive offering including Ferrari World Abu Dhabi, Dubai Parks and Resorts' Motion Gate, IMG Worlds of Adventure and more. Saudi Arabia's Qiddiya that will feature the region's first Six Flags Park is expected to open by the end of the year, while Qatar's Doha Quest offers immersive and adrenaline charging indoor experiences. Egypt is also planning new entertainment hubs under its Vision 2030.

Post-pandemic, regional theme parks on a growth curve

As the landscape is becoming more vibrant, the big question remains: are regional theme parks seeing growth in the post-pandemic era?

Sharing their perspectives exclusively for *MENA Leisure Report 2025*, Antonio Zamperla, Brian Machamer and Yawar Pasha agreed that the theme park industry is experiencing a strong post-COVID recovery, with visitor numbers and revenues surpassing pre-pandemic levels. Despite inflation and rising costs driving up ticket prices, demand for immersive experiences remains high. Parks are responding with new attractions, seasonal events and digital innovations, fuelling continued growth and renewed regional investment.

Talking specifically about Saudi Arabia, Brian Machamer observed that "the timing couldn't be better," as Boston Consulting Group's latest research reveals that two-thirds of Saudi residents express strong interest in expanding entertainment options, indicating the demand for world-class entertainment experiences.


Dubai Parks & Resorts

Are operators upping the game with immersive experiences?

The short answer is yes.

Operators in the theme park industry are adeptly adapting to consumer demands for more immersive and IP (intellectual property) based experiences, Yawar Pasha emphasised.

"Parks are investing in virtual reality (VR), augmented reality (AR) and other technologies to create unique and immersive attractions. In our case, beloved IPs like Marvel Universe and Cartoon Network, coupled with thematic attractions are at the forefront of IMG Worlds of Adventure, offering guests unparalleled experiences," - ***Yawar Pasha***

While Six Flags Qiddiya City is working to redefine the guest experience with six uniquely themed lands, each telling a distinct story tailored to diverse audiences. By blending advanced technology with authentic cultural elements, the upcoming development aims to set a new standard in entertainment and operations.

Offering a global perspective, Antonio Zamperla said, "New IP-focused parks are on the rise, like Universal Studios' planned UK park. Operators are investing in advanced technologies for deeper immersion."

A quick look at emerging trends

The future of the theme park industry will be shaped by trends including data-driven personalisation supported by immersive technologies like artificial intelligence (AI), AR and VR; social media integration and user-generated content acting as smart marketing tools; accessibility and inclusivity; and sustainability efforts.

On one hand, theme parks are integrating AI for tailored experiences. On the other hand, operators are also focussing on wellness, with stress-free zones and health-conscious options, Antonio Zamperla shared. "Another growing attractions trend for 2025 is the rise in popularity of family coasters, as opposed to the record breaker," he pointed out.

"Six Flags Qiddiya City is set to open in 2025 with the latest and greatest technologies available," Brian Machamer stressed. "We're pioneering these trends through innovative ride systems, interactive attractions and seamless technology integration that will enhance rather than overshadowing the guest experience."

Meanwhile, Yawar Pasha pointed towards how theme parks are exploring new entertainment formats, such as e-sports and interactive live performances to attract a broader audience.

Importantly, sustainability and accessibility are becoming essential pillars in the theme park industry – not just for social responsibility, but also for long-term profitability, all three of them stated. Parks that prioritise environmental and social initiatives build stronger connections with visitors.

For example, IMG Worlds of Adventure has adopted eco-friendly practices, such as reducing waste and energy use and ensuring accessibility for all guests, creating experiences that are both sustainable and inclusive. While Six Flags Qiddiya City promises to embed inclusive features – from ride vehicles to queue systems – into every aspect of the park, alongside advanced operational efficiencies. Antonio Zamperla's family business has championed accessibility since 2010, pioneering universal ride design under the vision of Late Alberto Zamperla.

Navigating obstacles

Despite recovery, resilience and growth, the theme park industry faces diverse challenges, from rising operational costs compounded by economic pressures to intensifying competition.

Rising operational costs, human resource (HR) management, increasing competition and the need for customised experiences are some challenges that the industry is facing, Yawar Pasha admitted. "We are addressing these challenges head-on by investing in staff training, in solutions to become operationally efficient and continuously innovating to offer unique, personalised visitor experiences. Success will hinge on our ability to adapt and innovate ensuring continued growth and resilience."

Labour shortages hinder efficiency, while competition from alternative entertainment options and emerging attractions necessitates constant innovation, Antonio Zamperla opined. "Additionally, the demand for customised experiences requires significant investment in technology and sustainability practices, as consumers increasingly expect parks to prioritise eco-friendly operations. Adapting to these challenges is crucial for maintaining competitiveness."

Talking specifically about the KSA market, Brian Machamer said, "Our unique position in Saudi Arabia presents exciting opportunities alongside distinct challenges. Thus, we're focused on developing local talent through our Saudization programmes, managing desert climate considerations and creating experiences that resonate with both local and international guests while maintaining world-class operational standards."

A look ahead: Theme parks gaining momentum

The global and regional theme park industry has shown impressive resilience and adaptability through 2023-24, navigating challenges such as supply chain disruptions, inflation, shortage of talent and extreme weather events, among others. Having said that, by embracing innovation through diverse offerings, smart automation and IP-driven experiences, location-based entertainment has sustained profitability despite fluctuating attendance.

Experts remain optimistic about the sector's dynamic nature and its ability to evolve and thrive. Moving forward, continued focus on guest experience, strategic investments and leveraging classic and emerging IPs, coupled with culturally appropriate localised content will be key to long-term growth. In summation, according to experts, the industry is well-positioned to captivate audiences with immersive and engaging experiences in the years to come.



Aerial view of Six Flags Qiddiya City


IMG
WORLDS
OF ADVENTURE
DUBAI



Pickalbatros Aqua Park, Sharm el-Sheikh, Egypt

STATUS OF THE INDUSTRY – WATER PARKS

MENA Water Parks Redefining Family Entertainment

The MENA water park industry has experienced significant growth over the past three decades, and this market segment continues to expand and innovate, thereby reflecting the region's commitment to enhancing tourism and entertainment offerings.

Diving into history: How the Middle East built a thriving water park industry


Wonderland near Dubai Creek

The first splash in the UAE's water park industry happened in the mid-1990s with the debut of Wonderland near Dubai Creek in 1996 and Dreamland in Umm Al Quwain in 1997. These developments signalled the start of a thrilling new era in the regional entertainment landscape. These early water parks, bursting with vibrant colours and diverse attractions, quickly became favourites among local visitors.

However, it was the grand opening of Wild Wadi Waterpark in 1999 that truly made waves, propelling the UAE onto the global stage as a top destination for water-based adventures. Having said that, as many of these original parks now surpass 20 years in operation, the challenges of maintaining their appeal and functionality are becoming increasingly apparent.

First-mover hurdles


Glenn Davidson

Wild Wadi, which opened as the UAE's first themed water park, played a pivotal role in shaping the industry. **Glenn Davidson**, who was at that time the General Manager for Jumeirah Group's water parks, reflecting on Wild Wadi's creation, described it as "the first water park that introduced homegrown intellectual property." The water park narrated the legends of Sinbad and Juha – the inspiration behind its design – through larger-than-life characters across its attractions and signage. Tied to the locally operated Jumeirah properties, Wild Wadi embraced a distinctly Middle Eastern identity while remaining open to both hotel guests and the general public. The park thrived, recording an unprecedented 31% attendance growth from 2010 to 2011, the highest by any


Wild Wadi Waterpark, Dubai





Yas Waterworld, Abu Dhabi

water park worldwide at that time. However, as the first park to attract international guests, Wild Wadi faced certain first mover challenges.



Chris Perry

Chris Perry, an industry veteran, recalled the unique multicultural environment that defined the UAE's early water park operations. Unlike North America, where lifeguard training could be completed in a day, in the early days the same process often took up to three weeks in the UAE. Owing to language barriers, some staff members had to first learn basic English or required translators to complete the courses. These challenges extended beyond safety training; even roles such as admissions presented hurdles. Employees had to navigate complex ticketing options while explaining them to guests often in a noisy environment where entrance music and the echo of air-conditioned plexiglass booths made communication even more difficult.

Intensifying competition

As the UAE's entertainment industry expanded, new attractions reshaped the landscape. The launch of Ski Dubai in 2005, Aquaventure Waterpark at the Atlantis Resort in 2008 and Abu Dhabi-based Yas Waterworld in 2013 nearly tripled the region's entertainment options in less than a decade. With more world-class destinations emerging, the competition among parks intensified, offering guests a wider variety of experiences.

However, rather than fostering rivalry, industry leaders including Perry and Davidson shared how the industry embraced a spirit of camaraderie. The vision was never about one park outpacing another; it was about collective success.

"If one park succeeds in promoting the city as a tourism destination, we all succeed," - Glenn Davidson & Chris Perry

Rather than trying to eliminate competition, they saw it as a driving force for improvement, pushing operators to refine their attractions and guest experiences. "More entertainment options didn't fragment the market; they expanded it, attracting new visitors to water parks and growing the industry's overall audience," they reminisced.

Riding the wave: Evolution of the regional water park industry

As countries in the MENA region, especially the UAE, Saudi Arabia and Egypt, continue to be prominent tourist destinations, amusement parks that include water parks, play a key role in contributing to the growth in tourism. With visitors and residents being willing to allocate more funds for leisure activities, such as visiting water parks, the demand for premium experiences is evident. This consumption pattern is boosting the size of the market and catalysing public and private sector investments to further diversify the amusement and water parks ecosystem.

For perspective, last year, the Middle East and Africa amusement parks market, including water parks, generated approximately $8.16 billion in revenue, Grand View Research indicated. This figure is estimated to grow at a CAGR of 6% between 2025 and 2030, totalling $12.05 billion by the turn of this decade. However, strategic planning and unique offerings are essential for sustained success in this competitive landscape.

Meanwhile, in 2023, hotels in the Middle East featuring water slides & rides, wave pools, splash pads, surf simulators etc. recorded 53% higher average Revenue Per Available Room (RevPAR) versus the regional average, according to a study conducted by Whitewater.

Getting the basics right

Every industry expert interviewed for the report emphasised the importance of safety and cleanliness in water parks, a priority that has intensified post-COVID.

Attendance at major parks has rebounded significantly, with Aquaventure Waterpark recovering from 600,000 visitors in 2020 to surpassing pre-pandemic numbers at 1.98 million in 2024. A similar trend was seen at Wild Wadi, where attendance dipped from 740,000 in 2019 to 350,000 in 2020 before stabilising at 750,000 by 2022, as per the TEA/AECOM Theme Park Index.

Running one of the first water parks in Saudi Arabia, **Wissam Banaja**, Chief Executive Officer at Rawae, highlighted how guest expectations have evolved.

"Today's visitors are more informed and intentional about their trips, seeking to create meaningful memories with family and friends," - ***Wissam Banaja***



Wissam Banaja

Meanwhile, given the high percentage of international visitors to the UAE water parks, delivering an exceptional guest journey is crucial. In this context, **Juan Richards**, General Manager – Waterparks at Dubai Holding Entertainment emphasised on the role of online reviews, noting that platforms such as TripAdvisor and Google significantly influence attendance.



Juan Richards

"Approximately 40% of guests at Wild Wadi come from hotels, but the total number of international visitors is even higher when factoring in day guests. The focus is on providing a seamless, frictionless experience from park entry and locker rentals to seating, ensuring guest satisfaction and positive reviews." - ***Juan Richards***

Aquaventure's mission is "to make every guest feel welcomed, with staff trained to offer warm greetings and attentive service throughout the park." - ***Sascha Triemer***, VP of Marine & Waterpark at Atlantis also echoed this sentiment.



Sascha Triemer



Atlantis Aquaventure Waterpark, Dubai


Meryal Waterpark, Qatar

Meeting evolving guest expectations

Rick Root, President of the World Waterpark Association, highlighted how guest expectations have evolved beyond just bigger, faster and more immersive attractions. While cutting-edge rides remain a key draw, today's visitors also seek a level of personalised service and exclusivity once reserved for only high-end resorts.


Rick Root

"***More than ever, now guests are willing to pay a premium for facilities that deliver both world-class entertainment and high-touch experiences, ensuring that their limited leisure time results in lasting family memories.***" - ***Rick Root***


Cyan Waterpark, Jeddah

This growing appetite for premium experiences is driving water parks to expand their VIP and luxury offerings. Citing an example, Banaja shared how Cyan Waterpark in Jeddah is prioritising the development of private seating areas and VIP lounges for 2025, recognising the importance of tailored experiences in driving guest loyalty. With ticket sales making up 70-80% of the park's revenue, the focus is on retaining repeat visitors by offering elevated, personalised services. Atlantis has also seen this trend play out, according to Triemer, with cabanas selling out consistently over the past three years.

"Success in the next five years will hinge on taking a holistic approach to the guest experience." - ***Bill Lentz***, General Manager of Meryal Waterpark, observed offering a perspective from the Qatari market.


Bill Lentz

Beyond thrilling attractions, factors including shopping, dining and value-added services are becoming just as important in shaping visitor satisfaction. He noted that simple enhancements such as offering professional photos throughout the park for guests to redeem may come at an additional cost but significantly enhance the perceived value of a visit.

Lentz also shared how coming from North America, he was surprised to see that some visitors in the region spend an entire day on the beach without stepping foot on a single attraction, underscoring the need for parks to diversify offerings and cater to a broader range of guest preferences.

Beyond the splash: The future of water parks in the Middle East



Rendered image of Shoot the Chute Water Ride at Qiddiya, Saudi Arabia



Rendered image of Aquarabia at Qiddiya, Saudi Arabia

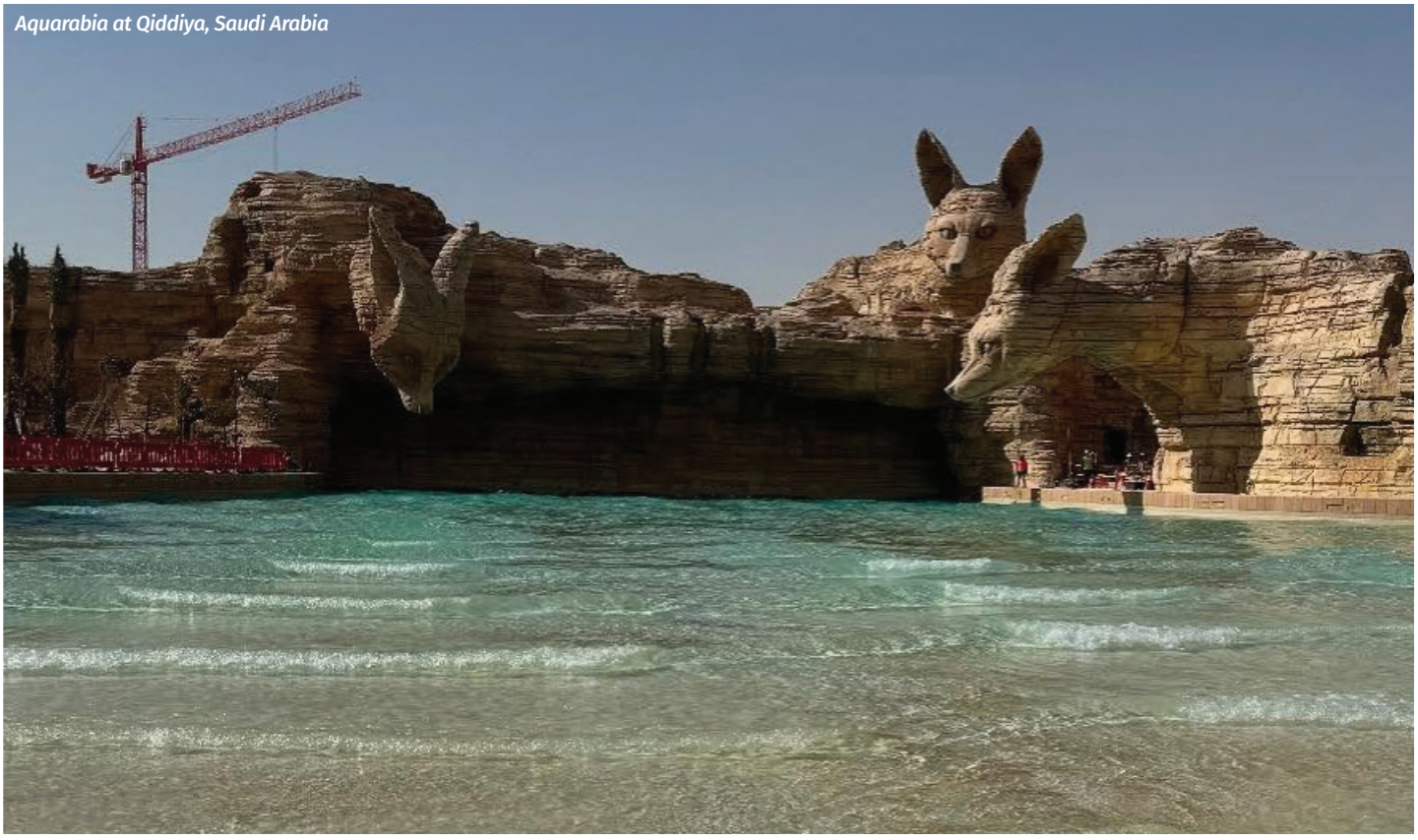
Vision 2030 and the realisation of Saudi Arabia's long-term goals

Richards perhaps best described the current state of the industry as an "unprecedented escalation of water park competition," where each facility is pushing the boundaries to build something bigger, better and more innovative than the last one. This drive has been a defining factor in the UAE's growth as a global leader in water-based attractions, but with major parks in Saudi Arabia now nearing completion, the dynamics of the industry is poised for a significant shift.

In this context, its important to reiterate that Saudi Arabia's Vision 2030 has placed significant emphasis on leisure and entertainment as a key pillar for economic diversification, and water parks are becoming an integral part of the country's expanding tourism landscape. Already, 20% of the Saudi population regularly visits theme parks, according to a YouGov survey, indicating strong local demand for these experiences. As Saudi Arabia introduces its own world-class water parks, it will be interesting to see how it impacts visitor trends in the UAE – whether it creates a new wave of regional tourism between the two countries or intensifies competition for international visitors.

Notably, slated to open this year, there is a lot of excitement around Aquarabia, Saudi Arabia's first water park being built by the Qiddiya Investment Company. The water park will have four record holders among its 22 rides, including the world's tallest 'water coaster' and tallest water slide.

Aquarabia at Qiddiya, Saudi Arabia




Marassi Water World, Africa

Africa and its high-growth potential

The other market to watch now is Africa with projections indicating substantial growth in the continent in the coming years. A report by the World Travel & Tourism Council (WTTC) in November 2023 highlighted that the African Travel & Tourism sector could add $168 billion to the continent's economy over the next decade. Although a 2018 Brookings report had stated that consumer spending on tourism, hospitality and recreation is projected to reach approximately $261.77 billion by 2030, marking an increase of $137.87 billion from 2015 levels.

Recent water park openings across Africa, such as Marassi Water World in 2022 and Neverland Waterpark in 2023, showcase the growing potential of the continent's leisure sector. These developments are just the beginning of what promises to be a significant expansion in water parks, creating the potential for Africa to become a global hotspot for leisure and tourism in the coming years.


Jungle Bay Waterpark, Le Mériden Mina Seyahi

Emergence of new venues

Looking at the revenue of a water park, on average, approximately 55-60% is generated from admission/ ticket sales with about 25-% generated from food, merchandise and other spending, indicates the IAAPA Outlook 2023-2027 report. As water parks demonstrate their ability to create additional revenue streams beyond ticket sales, other sectors are integrating water-based attractions into their developments as a strategic move to draw more visitors and enhance guest experiences.

The hotel and resort sector is experiencing significant growth, particularly in the UAE. According to Knight Frank, the country is currently developing approximately 26,832 new hotel rooms, expected to be complete by 2030. By incorporating water parks and water-based attractions, resorts not only enhance the overall value of their property but also extend guests' length of stay, leading to increased spending on food, beverages and other amenities. A study by WhiteWater found that resorts featuring water park attractions had RevPAR levels between 17% and 145% higher than those without, demonstrating the financial benefits of integrating water parks into resort experiences.


Mike Rigby

Mike Rigby, GM & RVP at WhiteWater, emphasised the rapid expansion of the hotel sector, noting the recent success of Jungle Bay Waterpark at The Westin and Le Meridien Mina Seyahi in Dubai, along with the highly anticipated launch of the Grand Hyatt Dubai Waterpark.

"More resorts are recognising the appeal of family-friendly water attractions that offer engaging, shorter experiences of two to three hours allowing guests to return day after day instead of committing to a full-day visit of six to eight hours."
- ***Mike Rigby***

This not only helps resorts and residential communities stand out in a competitive real estate market but also enhances the guest experience by providing convenient, built-in entertainment.

A second growth market segment is the rise of standalone surf venues with the global market for surfing estimated at $4.2 billion in 2023 and projected to reach $5.5 billion by 2030, as per Research and Markets. In the Middle East, developments such as the 2024 opening of Surf Abu Dhabi and the three upcoming Flow House venues by SEVEN across the Kingdom of Saudi Arabia are poised to tap into the region's appetite for sports-related entertainment and create additional revenue steams through lessons, rentals and adjacent food and beverage sales.

Outlook at a glance

The MENA water park industry is entering an exciting new chapter, marked by innovation, diversification and regional collaborations. With Saudi Arabia's Vision 2030 driving new mega-projects and Africa showing strong growth potential, the industry is expanding beyond traditional boundaries. Evolving guest expectations are prompting operators to deliver more personalised, high-end experiences while maintaining a focus on safety, service and seamless operations. As investment flows into both established and emerging markets, water parks are becoming central to tourism and entertainment strategies across the region. The future promises a dynamic landscape where creativity, technology and guest-centric design promise to redefine the family leisure experience.

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STATUS OF THE INDUSTRY – FEC

MENA Family Entertainment Centres Adapting, Investing and Thriving Amid Changing Dynamics

Family entertainment centres (FECs) have been an integral part of the Middle East and North Africa (MENA) region's social and economic fabric – a concept that was introduced nearly three decades ago to add an element of excitement to the traditional shopping experience.

One of the earliest FECs to pop up in the region was Sindbad's Wonderland at Al Ghurair Centre in Dubai in the early 90s. This was the go-to space for family fun since its opening and even a space where families gathered with their young ones. Given that we are in a region where weather and adherence to Islamic values are significant considerations, FECs offer safe, controlled and culturally respectful recreation for families.

FEC landscape buoyant amid evolution

Over the years, the FEC landscape has evolved to meet changing consumer expectations through innovation, investments and by nurturing guest relationships. Even as FECs leverage technological advancements now, they have managed to retain the original charm by preserving elements that evoke nostalgia, such as classic arcade games and traditional rides like Ferris wheel. This is one of the key reasons why FECs remain relevant amid intensifying competition from peers and newer formats.

Importantly, FECs contribute substantially to the region's economy. This segment of the market grew from $52.35 billion in 2024 to $59.17 billion in 2025 and is expected to grow at a compound annual growth rate (CAGR) of 13.33%, touching $110.97 billion by 2030, Research and Markets estimates. Alongside generating jobs, FECs support ancillary businesses, including retail, food and beverage (F&B) as well as service providers.

"FECs are, indeed, regarded as important service anchors within retail developments as malls evolve into retail-tainment and lifestyle destinations," *noted* ***Prakash Vivekanand****, Founder and Managing Director, Amusement Services International LLC.*



Prakash Vivekanand

FECs and indoor entertainment remain key footfall drivers for brick-and-mortar retail amid the shift to online shopping. That's why, despite rising competition and market saturation, the industry thrives as developers innovate with unique content to stay ahead.



Whoopiland, Kuwait



Sparky's

"Within this diverse and dynamic environment, there is a dramatic fight for talent, for locations at the right price point and getting the right product at the right price, at the right place, at the right time." - ***Silvio Liedtke***


Silvio Liedtke

The regional FEC landscape is "buoyant, creative and dynamic," stated Silvio Liedtke, Chief Executive Officer of Landmark Leisure which operates Fun Block, Fun City, Fun Ville, Fun Works, Tridom and Floored.

FEC industry "resilient" despite a "slight dip"

Even as the FEC space is becoming more vibrant, do numbers add up?

Asked about the performance of the regional FEC landscape in the past 12 months, **Damien Latham**, Chief Entertainment Operations Officer for Saudi Entertainment Ventures (SEVEN) that's developing 21 entertainment concepts across 14 cities in the Kingdom said that the industry has seen "a slight dip" in 2024 versus 2023.

"We came out of the pandemic very strong in 2021-22, while 2023 saw a tail off and 2024 was a tougher year. I don't think any facility in the GCC – be that FECs, theme parks or visitor attractions – have been completely insulated. Having said that, of course, there would be some anomalies." - ***Damien Latham***


Damien Latham

Offering a slightly different view, Prakash Vivekanand said, "FECs in the MENA region were well ahead of the pre-COVID revenue levels. We surpassed these revenues in 2022 itself. The UAE performed better for most parts of 2024 in comparison to 2023. However, in other parts of the GCC, some FECs have reported a slight, single digit, decline in revenue, primarily due to the many seasonal events during the last quarter of the calendar year when the weather is more conducive for customers to indulge outdoor."

In the wider MENA region, Egypt has been "exceptional" in terms of player participation within FECs. Other markets such as Tunisia, Morocco and Algeria are also seeing a surge in FECs as retail developments grow in these countries.

Overall, compared to the pre-pandemic levels, the industry witnessed "a mixed bag" of results in 2024, *added* ***Mohamed Attia****, Chief Executive Officer, Ground Control Entertainment Co.*



Mohamed Attia

According to him, while growth may have slowed down, the industry demonstrated resilience in 2024 compared to the previous year.

Immersive experiences & competitive socialising on the rise

Diving into factors driving growth for the FEC industry, rising disposable incomes and a demand for shared experiences are fuelling the development of the industry. With a growing consumer desire for personalised and memorable experiences, operators are leveraging technologies including artificial intelligence (AI), virtual reality (VR) and augmented reality (AR) to create immersive experiences peppered with gamification.

Consumer preferences have evolved drastically in the "vaccinated era," observed Prakash Vivekanand. "Most FECs are witnessing a surge in tween, teen and young adult players. These consumers have competition and gaming ingrained in them. Attractions and games that are sporty and more interactive have soared through rankings. Simulators and video games have also seen increased participation. We have seen a significant demand for group and social concepts increase as the age group of 21+ seek more relatable entertainment spaces to participate as a group of 6-8 players."

"Interactive gameplays and VR ride simulations are creating unique and lasting memories among guests of all ages," added Mohamed Attia.

Unattended VR experiences have outperformed attended and free-roam variants, observed Prakash Vivekanand. Alongside these, bowling centres, immersive "phygital" concepts and escape rooms are gaining popularity across the GCC.

Interestingly, the demand for competitive socialising is evident even beyond the region. A reason why Landmark Leisure is all set to launch its first competitive socialising concept in India.

Localisation is key

Another key evolution in the FEC space is localisation of content, pointed out Damian Latham. "We have partnered with global IPs, including the world's first Formula E-branded indoor karting attraction and FlowHouse, which make up 25-30% of our portfolio. The majority of our assets are being proudly developed in Saudi Arabia. As we prepare to launch our first entertainment complex this year, we are prioritising an unparalleled experience by emphasising on storytelling and localised content."

Data remains crucial

FECs are increasingly leveraging data analytics to make experiences more personalised through customised recommendations, targeted promotions and interactive content based on individual preferences, noted Mohamed Attia.

Adding on, Prakash Vivekanand highlighted that careful and conscientious use of data plays a pivotal role in analysing consumer habits, spend patterns, participation



Carttel, Jeddah, KSA



The Zone, Dubai

within attractions resulting in better revenue output. "For example, within our operations, we have benefited significantly by tailoring a lot of our play packages based on customer play patterns, thus attracting higher repeat participation," he explained.

Success hinges on innovation and appetite to invest

As guest preferences and behaviours are constantly evolving, success of FECs will hinge on great locations offering memorable experiences. As Damien Latham pointed out, some existing operators have fantastic locations equipped with well-established brands fetching them healthy margins.

While building "great locations" is a good idea, in certain not-so-big markets like the UAE, is there even space for new concepts?

"The beauty of a free market is that there is nobody who allows or denies entry if you have the right product and the money to invest," Silvio Liedtke opined. "The dynamism is also part of the reason why a lot of investors still see certain markets as highly attractive. While the customer is spoilt for choice, as a legacy operator sometimes, we struggle to keep up," he admitted.

At the other end of the spectrum from the legacy operators is SEVEN that's currently building 13 different locations. How do such operators create economically viable propositions?

"It's a careful balance of multiple factors," Damien Latham responded. "We've had to evaluate demographics and their ability to spend, because placing a high-cost development in a city with 500,000 population isn't financially viable. In doing so, we've relied on data from our various surveys to understand visitors' spending appetite. At the same time, we've had to be conscientious about using that data and not overcook or over invest."

Success will also depend on the industry's appetite to invest in the upkeep of existing facilities.

In this context, Silvio Liedtke shared, "Over the last 12 months, we've upgraded four-to-five of our facilities in the UAE alone. We didn't change all the assets, but created a different environment, giving our brands a fresh look, while also adding some relevant pieces of technology. As a result, the same sites have recorded stronger growth."

"If we stand still in our industry, it's bound to erode revenue efficiency," he continued. "Having said that, we have over 8,000 revenue generating assets across the Middle East and India. Since every location can't be upgraded annually, we follow an asset rotation policy. We focus on our top performing facilities and replace around 10% of its asset base every year, moving the assets down to the next level of stores. Through this asset rotation policy each of our stores get something new literally every year."

Innovation, although essential, indeed comes at a significant cost, Damien Latham agreed. "For instance, every single of our FECs will have indoor-style rollercoasters, a first-of-its-kind in Saudi Arabia. That itself required big investment. Once that's done, we have to invest in machines, merchandise, skill games, technology, and every detail must be carefully thought out. The environment must be right to innovate. Importantly, the actual physical capability of executing any innovation is needed."

"We are an industry wherein investments made into an operation are returned over a period of time after the facility opens. If operators don't plan their investments and choice of location correctly by factoring in operating expenses, the likelihood to fail could be high. Ideally, FECs should be morphable to address shifting demographic preferences, and the cost of concept metamorphosis should be factored in at the conceptualisation stage," Prakash Vivekanand advised.

What lies ahead?

Despite intensifying competition from other formats, it's evident that FECs have managed to maintain their sheen and loyalty. Having said that, what will drive the industry forward – what will be some hits and misses?

Even as demand rises over the next two-to-five years, not every business will sustain itself, Silvio Liedtke warned. There will be a fight for sustainable return of investment. As guest behaviour evolves, there will be replacements in the industry. "On another note, it will also be interesting to see how the cinemas evolve amidst the convenient streaming services," he added.

Revenue cannibalisation due to increased competition from similar offerings, competition from seasonal offerings, ever rising lease costs, shifting demographic preferences and increasing capital investment are critical factors hurting the FEC industry regionally, Prakash Vivekanand opined. "Unique entertainment offerings backed by fantastic customer service and innovative operational methods are the key to overcome these hurdles," he suggested.

"I think a big challenge that our industry faces is a race for talent," Damien Latham stated. "Success will depend on getting the right talent to gauge and exceed the ever-evolving guest expectations."

"As our industry faces competition from digital entertainment, as operators we will continue investing in innovative tech tools to enhance guest experience. There is need to optimise operations and streamline processes to improve efficiency and reduce overheads. There will be diversification of offerings too, while prioritising employee development on one hand and enhancing safety protocols on the other," Mohamed Attia added.

To survive and thrive in this intensely competitive and ever evolving environment legacy operators – like Landmark Leisure – must stay competitive and relevant, while large-scale, often government-backed projects need sustainable profitability strategies, and new players must build customer loyalty while ensuring financial viability, Silvio Liedtke added.

Outlook at a glance

The outlook for the MENA FEC industry is full of promise, with strong potential for regional differentiation through concepts that reflect local culture and heritage therein captivating tourists. As families increasingly seek shared experiences to create lasting memories, FECs are well-positioned to thrive. Rapid technological advancements will further elevate digital entertainment, offering more immersive and engaging experiences in the coming years. At the same time, delivering value for money will remain essential in attracting repeat visitors and building long-term loyalty. By blending cultural relevance, innovation and affordability, MENA-based FECs are set to shape a vibrant and resilient future. Overall, industry experts believe that experience, innovation, localisation and value are some factors that will drive the FEC industry forward.



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STATUS OF THE INDUSTRY – EDUTAINMENT

Purposeful Play: Where fun meets learning

The participatory play industry in the Middle East and North Africa (MENA) region is experiencing a period of significant growth, driven by rising disposable incomes, rapid urbanisation and a youth-dominated demographic whose preferences are evolving. In addition, visitor preferences towards immersive and educational entertainment experiences, technological advancements and strategic investments to further diversify the offerings are catalysing growth for this segment.

Before examining the state of the industry, let's first decode what participatory play means.

Participatory play refers to interactive and immersive play experiences designed with the aim to foster cognitive and social development across age groups. Participatory play facilities revolve around hands-on, experiential learning through fun activities, encouraging creativity, problem-solving and social interaction. Such facilities fall under the umbrella of indoor play areas and family entertainment centres (FECs). They cut across segments including soft play and toddler play areas, edutainment centres; trampoline parks; climbing walls; air parks & obstacle courses; and augmented reality (AR) based play experiences and the like.

2024: A year of "strong" resurgence

To understand how the participatory industry is faring amidst new realities and expectations in the post-COVID era, we spoke to prominent leisure & entertainment participatory play area operators including Alex Zavyalov, Co-Owner/Chief Executive Officer, Hello Park; Aliesha Brar Malik & Salil Malik, Founders & Co-Chief Executive Officers, Boo Boo Entertainment; Ghassan Assi, Chief Operation Officer, Trampo Extreme; and Shifa Yusuffali, Founder & Chief Executive Officer, IdeaCrate Edutainment Company that operates Orange Wheels and Orange Hub for their opinions on how this segment has fared in 2024.

They agreed that the participatory play industry witnessed a strong resurgence in 2024, surpassing pre-pandemic levels and 2023 figures. Rising consumer footfall and revenues have driven expansion, with venues adopting digital offerings and flexible membership models to maintain engagement. The return of out-of-home activities and increased leisure focused spending fuelled growth, particularly in markets including the UAE and Saudi Arabia.



Trampo Extreme



Orange Wheels

However, these experts opine that challenges persist, including economic uncertainties, rising operational costs and intensifying competition, requiring continuous innovation to retain visitors. High churn rates remain an issue, but the demand for immersive, interactive and educational experiences is accelerating industry-wide expansion. Despite economic pressures, affordable, value-driven play spaces that blend education and entertainment are thriving, reflecting the region's commitment to fostering safe and engaging family environments.

Ideas, innovation & investments catalysing growth

The MENA participatory play industry is expanding rapidly, with FECs being a key growth catalyst particularly in the UAE. The market is projected to reach $1.68 billion by 2027, **Mr. Assi** shared quoting figures from an Allied Market Research Report.



Ghassan Assi
COO, Trampo Extreme

"Government investments, particularly in Saudi Arabia, are further accelerating growth. With substantial funding allocated to gaming and entertainment, infrastructure development continues to expand, reinforcing the industry's upward trajectory. Meanwhile, Egypt is expected to see the fastest growth, projected to rise 19.2% annually between 2022 and 2027, driven by government initiatives to attract foreign investments and promote local developments," he added.

"Businesses that embrace and balance innovation, inclusivity and sustainability will create richer and more engaging experiences for players while staying ahead in this fast-evolving industry." – Ghassan Assi

The participatory play industry is, indeed, experiencing significant growth across the MENA region, **Ms. Yusuffali** agreed. "Growth is driven by a rising demand for experiences that combine entertainment with education and immersion. Importantly, the role of play in building stronger societies and cohesive communities has been recognised not just by the industry and visitors but also by the GCC governments. Initiatives such as Saudi Vision 2030 and the UAE's declaration of 2025 as the 'Year of Community' are aimed to contribute to regional goals of youth development, innovation and social well-being."



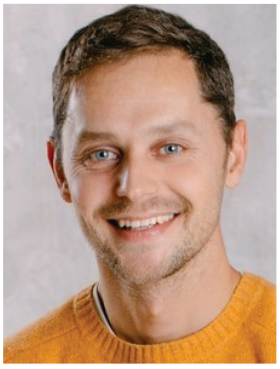
Shifa Yusuffali
CEO, IdeaCrate Edutainment Co.

"The participatory play industry is more than just a business; it is a catalyst for community building, youth development and social cohesion. As leaders in this space, we've a unique opportunity to create meaningful, inclusive and forward-thinking experiences to enrich lives and strengthen communities across the MENA region and beyond." – Shifa Yusuffali

Alongside increasing willingness to spend on leisure activities, innovation is another big reason for growth of the participatory play industry, Mr. & Mrs. Malik observed. "New ideas in interactive play are setting the bar higher for the industry to not only grow, but offer more personalised, educational yet fun experiences. For example, when we designed Boo Boo Laand we wanted to fill what we believed was a gap in the market for a more premium play area with higher standards of interaction, more unique and innovative attractions and a more comfortable and enjoyable place for parents," they shared.

Steering the conversation towards the science behind planning indoor parks and playgrounds, **Mr. Zavyalov** recommended that market size should align with the population of the region. "For every location, we factor in around 250,000 in population, aiming for one park per vicinity. Then we adjust our projections based on existing competition."

Interaction and immersion creating new opportunities



Alex Zavyalov
CEO, Hello Park

The participatory play industry has always been centred around creating holistic experiences that are immersive, interactive, enriching and fun. What's new is the evolving visitor expectations around integrating creative and STEM (Science, Technology, Engineering and Mathematics) coupled with storytelling adapted to individual choices, thereby pushing businesses to rethink their strategies.

"The requirement to make play areas and parks more accessible is on the rise. This shift towards accessibility has become a standard practice in the industry, which is very satisfying." – Alex Zavyalov

Interactive and immersive play is, indeed, revolutionising the industry, as guests are increasingly seeking experiences that are both engaging and educational for holistic development of children and families, Ms. Yusuffali observed. By designing play environments that encourage discovery, creativity and skill-building, businesses are not only meeting consumer expectations but also supporting the region's broader goals of nurturing future-ready generations and fostering community bonds.

"From a business standpoint, this trend is shaping venues to create unique positioning and generate additional revenue, as parents are often willing to pay a premium for edutainment experiences. Longer engagement time and extras including workshops, memberships and interactive zones open new opportunities for growth. That's why we have been mindful about incorporating all these elements in the design of Boo Boo Laand with our dedicated workshop space and multiple educational attractions that are new and innovative but without the excessive use of technology," Mr. & Mrs. Malik shared.

At this point, Mr. Zavyalov shared how Hello Park creates immersive phygital formats by seamlessly blending physical and digital experiences. "Technology bridges the gap between screens and interactive park activities, boosting engagement and repeat visits. By integrating touch-based interactions, we attract both new and returning visitors, ensuring a dynamic experience for the digital generation."

"As an industry, we've a dual focus now centred around attracting a wider audience and creating new revenues streams, such as subscriptions and partnerships with educational institutions. The challenge is to constantly find new ways to balance fun with educational values. Facilities that can do this will stand out and thrive," Mr. Assi opined.



Hello Park

Accessibility and inclusion are pivotal

Accessibility and inclusivity are key priorities for the industry to ensure children of all abilities can enjoy meaningful play time. Driven by social awareness, guest preferences, operator & government priorities, majority of participatory play venues are now built in a manner that's welcoming for all. Most venues have wheelchair-friendly pathways, ramps, wide entry points, adaptive play equipment, tactile play zones and sensory-friendly areas to ensure a comfortable experience for all visitors.

"Inclusivity is a growing priority for the participatory play industry, and the MENA region is leading by example," Ms. Yusuffali emphasised. "From adaptive play equipment to sensory-friendly spaces, play areas are becoming more accessible, ensuring that children of all abilities can participate fully. What's more, this approach aligns with the UAE and Saudi Arabia's commitment to creating inclusive societies where every individual can thrive."



Aliesha Brar Malik
Founder & Creative Director,
Boo Boo Entertainment



Salil Malik
Managing Director,
Boo Boo Entertainment

Mr. & Mrs. Malik also agreed that there is a stronger focus on sensory accessibility. Some venues have started offering low-sensory environments, quiet hours and tailored interactive experiences to support children with autism or sensory sensitivities, making sure they can fully participate in play. Alongside the physical environment, staff training is also improving as teams are being taught to support children with diverse needs.

"Families are becoming more mindful about materials, themes and values behind play experiences, thereby driving a stronger emphasis on eco-friendly initiatives, nature-inspired play and more responsible entertainment choices." – Aliesha & Salil Malik

From retrofitting venues, creating 'quiet' zones, customisable low-stimulation options and sensory-friendly experiences to staff training and pre-visit guides have improved inclusivity, ensuring broader participation. While progress continues, challenges remain in creating fully accessible and inclusive interactive participatory experiences for all, Mr. Assi summarised.

Navigating obstacles

In summation, asked about challenges facing the participatory play industry, Mr. Zavyalov said, "Screen-based entertainment has claimed children's attention and time, providing a parallel world of heroes, events and challenges. It's becoming increasingly difficult to bring them back to the parks with classic configurations, which is affecting visitor numbers and business. That's the primary challenge for us, and we are developing tech-enriched formats and new play strategies to overcome this roadblock."



Boo Boo Laand

Mr. Assi agreed that the participatory play industry is undergoing a major transformation, driven by “exciting new trends” that are changing the way people engage with immersive interactive experiences. Artificial intelligence-driven personalisation is creating adaptive, unique experiences for each player, but it also raises concerns about data privacy.

As businesses are shifting to subscription and membership models, offering families flexible, value-driven options while securing recurring revenue, the challenge is to keep the content fresh to keep visitors engaged in the long-term, Mr. & Mrs. Malik added.

“As a board member of MENALAC, I’m proud to see the region embracing innovation and inclusion, setting a standard for the global industry, reflecting the values of compassion and community,” Ms. Yusuffali concluded.

The road ahead: Key takeaways at a glance

As the regional participatory play industry experiences a strong resurgence, several key factors are essential to ensure its sustained long-term growth. Government investments in building world-class entertainment hubs—particularly in countries such as Egypt, Saudi Arabia, and the UAE—are reinforcing the industry's upward trajectory. At the same time, innovation in interactive play and a strong emphasis on accessibility remain critical to providing meaningful play experiences for children of all abilities. The sector is also embracing eco-friendly initiatives and nature-inspired play to align with the evolving preferences of families. Importantly, the participatory play industry represents more than just a commercial venture – it serves as a catalyst for social interaction and community building. Looking ahead, it is vital to remain mindful of ongoing challenges such as economic uncertainties, rising operational costs and increasing competition, all of which must be addressed to future-proof facilities and sustain momentum.


Orange Wheels



Boo Boo Laand


Trampo Extreme

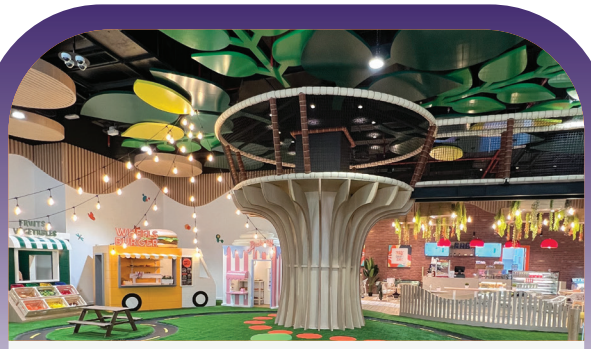

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STATUS OF THE INDUSTRY – VISITOR ATTRACTIONS

MENA's Must-See Marvels:
How World-Class Attractions Are Catalysing Tourism Growth

The Middle East and North Africa's (MENA) travel & tourism sector grew by more than 25% to reach almost $460 billion in 2024, according to the recent World Travel & Tourism Council (WTTC) report. International spending on travel & tourism in the Middle East grew by 50% to reach $179.8 billion, while domestic visitor spending rose by 16.5% totalling $205 billion. If anything, these figures underscore the MENA region's robust recovery and growth in the travel & tourism sector.

Playing a significant role in boosting travel & tourism is the rich tapestry of visitor attractions across the region that draw millions annually to its cultural, historical and modern sites. Take the example of the Sheikh Zayed Grand Mosque in Abu Dhabi that welcomed over 6.5 million visitors, a 20% rise from the previous year. Of this, 81% were international tourists, highlighting the site's global appeal.



Sheikh Zayed Grand Mosque, Abu Dhabi

While Dubai's iconic Burj Khalifa continues to rank among the most popular modern sites in the region. According to data from analytics company Switch on Business, Burj Khalifa receives 22 million Google searches and 17 million visitors annually, earning around $621 million in ticket revenue. Complementing this premier global destination are the Dubai Fountain (currently closed for renovation) and Dubai Aquarium & Underwater Zoo that offers an immersive marine experience.

Staying with attractions focused on marine life, Abu Dhabi's National Aquarium in Al Qana is also gaining popularity. Showcasing marine biodiversity through its 60 exhibits across 10 zones, it is home to more than 46,000 sea animals and 300 different species. The aquarium has been instrumental in enhancing Abu Dhabi's attractions landscape while fostering environmental awareness.

Mention must also be made of the revamped Ain Dubai – the world's tallest and largest observation wheel – which reopened recently after an almost two-year hiatus.

Amidst several new visitor attractions, Dubai's multicultural, outdoor and seasonal entertainment destination Global Village continues to be a crowd favourite. The destination attracted 10 million visitors during the last season (2023-24). Offering an amalgamation of cultures, cuisines, crafts and entertainment from around the world, Global Village ranked as the most visited UAE attraction in 2024, a YouGov survey indicated.

Meanwhile, surpassing Global Village's footfall record, the fifth Riyadh Season in Saudi Arabia attracted 20 million visitors in 2024, as per the Saudi General Entertainment Authority. Notably, the Riyadh Boulevard World has also emerged as a centrepiece of the capital's entertainment ecosystem. Featuring a blend of international cuisines, performances and attractions, it reflects the Kingdom's Vision 2030 commitment to diversify its economy and promote tourism.

Within the GCC, Qatar is also putting in efforts to enhance its cultural and entertainment offerings, with attractions that blend traditional heritage with modern experiences. Resultantly, its tourism sector witnessed remarkable growth in 2024, welcoming over 5 million international visitors, a 25% increase from the previous year. In terms of visitor attractions, the National Museum of Qatar offers immersive experiences into its rich heritage, while the Museum of Islamic Art showcases an extensive collection of artifacts.



Grand Egyptian Museum

Staying with museums, Dubai's Museum of the Future – which has attracted over 3 million visitors from 177 countries since it opened in 2022 – stands as a testament to the region's forward-thinking ethos. It offers visitors a glimpse into potential futures shaped by innovation and technology, aligning with the UAE's vision of fostering a knowledge-based economy.

What's more, after decades of anticipation, the Grand Egyptian Museum (GEM) near the Giza Pyramids has commenced partial operations. Designed to house Egypt's vast antiquities, the GEM aims to welcome 18 million visitors annually by 2030.

An already diverse and vibrant landscape is set to become even more exciting as the MENA region is set to welcome new attractions.

Among them is the teamLab Phenomena Abu Dhabi, an immersive art space that opened in April 2025 at the Saadiyat Cultural District, which also houses Louvre Abu Dhabi. For perspective, teamLab Planets in Tokyo saw a remarkable 130% year-on-year increase in ticket sales following a major expansion in January 2025. Spanning 17,000 square metres, the soon-to-open teamLab Phenomena Abu Dhabi also promises to take guests on a captivating, multi-sensory journey.

Step into the future: The rise of immersive entertainment in the MENA region

In 2024, the immersive entertainment market in the Middle East and Africa region generated revenues of approximately $2.31 billion, as estimated by Grandview Research. This market segment is projected to grow at a compound annual growth rate (CAGR) of 26.9% from 2025 to 2030. Meanwhile, the UAE's immersive entertainment market, alone, is estimated to reach $1.66 billion by 2030, with a projected annual growth of 27.3% between 2025 and 2030.

MENA's immersive entertainment market is evidently on an expansion mode, catalysed by integration of technologies including virtual reality (VR), augmented reality (AR) and mixed reality (MR). A market that's projected to be worth $945.5 million this year, touching $1.29 billion by 2029 growing 8.10% annually, according to Statista.

The performance of the immersive entertainment segment is "sky high." - Alexander Heller



Alexander Heller

Sharing exclusive insights for the *MENA Leisure Report 2025*, he said that AYA saw three consecutive "record months" in November & December 2023 and January 2024. "Overall, comparing 2023 versus 2024, we recorded a 17% year-on-year (Y-o-Y) growth. And we anticipate this performance to translate to our new attraction, House of Hype in Dubai Mall as well," confirmed **Alexander Heller**, Founder & Chief Executive Officer for AYA – HyperSpace and House of Hype.



AYA HyperSpace

Open since December 2022, AYA Universe is one of the newer and immersive destinations in Dubai. It's a unique, futuristic destination that seamlessly blends technology, storytelling and art, thereby offering an Instagrammable experience for residents and tourists. HyperSpace develops highly experiential and immersive attractions and contributed to a 101% Y-o-Y rise in the Group's total revenues between 2023 and 2024. While House of Hype, spanning 100,000 square feet, offers a dynamic blend of gaming, social media, pop culture and F&B and shopping, integrated with immersive design and technology.

"With these new concepts we saw the opportunity to disrupt the market against traditional entertainment, which has proven to be a great bet," Alexander Heller added.

Beyond reality: Trends shaping the market

- **By tapping into one of the largest mega trends today by leveraging social media driven experiences, immersive and experiential entertainment transports guests to a new world.**
- **The adoption of AR, VR and MR technologies is enhancing user experiences, making entertainment more interactive and personalised.**
- **Placing importance on sustainability and accessibility is what will differentiate companies in this space to make a real difference and stay relevant in the long-term.**



National Museum of Qatar

Asked about challenges that could potentially impact the growth of this market segment, Alexander Heller said, "Globally, saturation in the immersive experience space is a looming threat. However, currently this threat isn't big in markets like Dubai that continue to provide massive opportunities and an extraordinary consumer base."

Outlook at a glance

Collectively, the diverse visitor attractions not only celebrate the MENA region's rich history and cultural diversity but also play a pivotal role in driving tourism, fostering economic growth and enhancing the global perception of the region as a multifaceted destination.

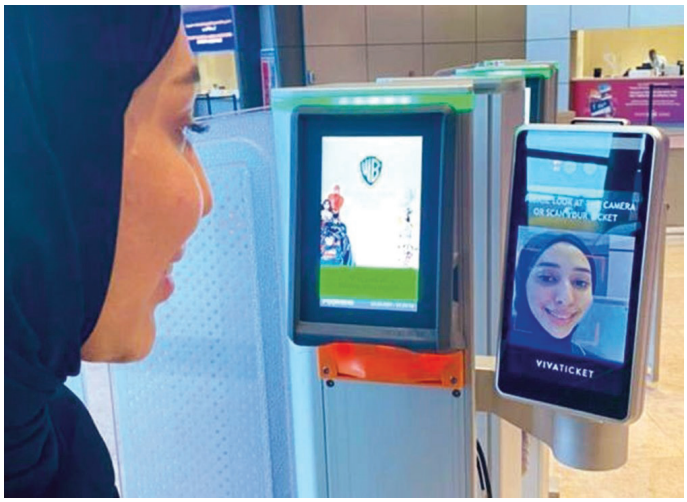
STATUS OF THE INDUSTRY – CASHLESS PAYMENTS INDUSTRY

Swipe, Tap, Enter:
The Rise of Cashless Ticketing in MENA's Entertainment Landscape

The Middle East and North Africa (MENA) region is witnessing a rapid surge in the adoption of cashless payment methods – a trend that aligns with the broader regional movement towards digital transactions, driven by consumer preferences for convenience and security.

According to estimates from Adyen, McKinsey & Company and Statista, the digital payments market in the MENA region was worth $50–55 billion in 2024. This growth is driven by high smartphone penetration, fintech innovation and supportive government policies.

Saudi Arabia and the UAE are leading adoption, with digital payments accounting for over 70% of transactions in some key segments including retail, transportation as well as leisure & entertainment. The market is projected to grow at a compound annual growth rate (CAGR) of 11-13%, touching the $120-billion-mark by 2030.



The leisure & entertainment industry has actively embraced advanced payment solutions. For instance, Embed – a cloud-based provider of cashless solutions for the amusement, entertainment and leisure industries – reported that their mobile wallet saw a fivefold increase in average reload value over traditional cash payments with 60% of reloads happening before guests arrived at the family entertainment centres (FECs).

"Today, 90% of consumers prefer to pay with credit or with debit card over cash, and 83% prefer cashless payments and tend to spend more in that mode of payment." - ***Renée Welsh***

Confirming the trend, **Renée Welsh**, CEO, Solutions Group, Embed, mentioned that the COVID-19 pandemic accelerated the cashless trend. Today, 90% of consumers prefer to pay with credit or with debit card over cash, and 83% prefer cashless payments and tend to spend more in that mode of payment, she quoted from the 2024 Gitnux Market Data Report.



Renée Welsh

If anything, the transition to cashless ticketing within the leisure & entertainment industry promises to significantly improve the guest experience, while boosting operational efficiency for venues.

Steve Drake, Chief Operating Officer – Asia & Middle East for Accesso that offers ticketing technology solutions added that in the recent years, operators have been keen to leverage technology to reduce labour costs while streamlining operations, and this has driven the expansion of cashless ticketing with self-service options, automated dynamic pricing and capacity management.


Steve Drake

"Leisure & entertainment operators can not only leverage digital wallets to streamline the purchase process, reduce fraud risks and improve operational efficiency, but even pay through face recognition rendering the whole experience convenient, safe and seamless." - ***Davide Camaiora***


Davide Camairo

Leisure & entertainment operators can not only leverage digital wallets to streamline the purchase process, reduce fraud risks and improve operational efficiency, but even pay through face recognition rendering the whole experience convenient, safe and seamless, pointed out **Davide Camaiora**, Managing Director, Vivaticket, a company that offers integrated ticketing solutions.



Data-backed decision making

As more and more visitors demand seamless transactions through cashless ticketing in leisure destinations, a key question is how technologies such as artificial intelligence (AI) and data analytics are transforming real-time pricing strategies. Importantly, how is it translating to enhanced customer engagement?

Referring to algorithms, AI and machine learning (ML) as effective tools to cut through the data clutter, enabling operators to make data-driven business decisions in real-time, Renée Welsh said "With the rise in smart reporting and analytics tools, cashless systems ensure a superior guest experience and better operational efficiency. Seamless transactions in FECs make guests happy and loyal, while data automation highlights helpful patterns and pain points enabling operators to ensure repeat footfall."

"AI is changing and augmenting the work of revenue managers to identify guest audiences and pricing opportunities where venues are not currently maximising their revenue. Smart venues are leveraging AI-powered pricing tools to test, iterate and refine their strategies with speed, accuracy and sophistication more rapidly than ever before," Steve Drake *observed.*

Davide Camaiora also agreed that AI and data analytics will play a crucial role in optimising real-time pricing strategies. "By analysing historical data and external macro-trends, AI-based algorithms can highlight information that would otherwise be missed by ticketing operators through their traditional tools. It is one of the most exciting new developments awaiting ticketing in the coming years," he highlighted.

The emergence of dynamic pricing

Staying with exciting developments supported by cashless ticketing, dynamic pricing is one area that the industry is aiming to decode. But what is dynamic pricing?

"Dynamic pricing allows operators to tailor guest experiences across a wide range of factors while maintaining control over their revenue," Steve Drake *explained.*

"For example, an operator can reduce prices to target one customer group without reducing prices across the board. This is powerful in attracting price-conscious visitors during low-demand periods while maintaining premium pricing for guests who have a less flexible schedule or are willing to spend more."

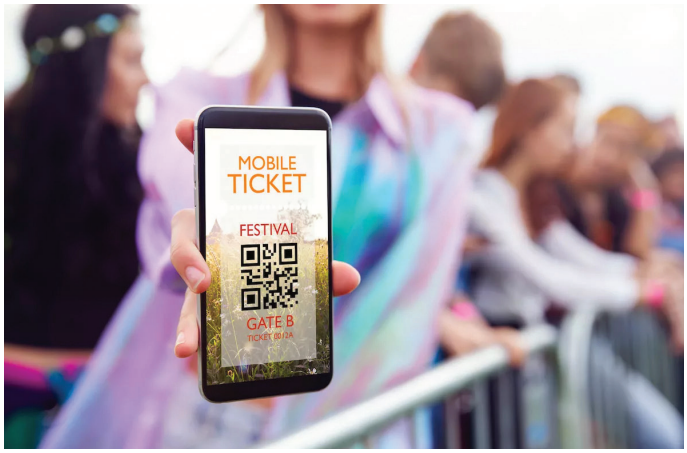
Talking about the impact of dynamic pricing on ticket sales, audience demand and revenue optimisation, Renée Welsh said, "Businesses apply dynamic pricing to increase revenue and foot traffic. With various consumer touchpoints spanning across multiple games, attractions or locations, operators may find it difficult to determine the most strategic way to adjust prices. With software-as-a-service (SaaS) solutions like our STATS business intelligence dashboard, we offer operators deep data and insights to guest information, spending behaviour, games performance and operational management. With access to such key insights, operators can embark on dynamic pricing strategies effectively to influence their business profitability."



On the other hand, Davide Camaiora is of the opinion that the primary goal of dynamic pricing is not to increase revenues, but to reduce customer spikes.

"Peak crowds force an increase in operating costs and reduce the quality of the user experience, especially if temporary staffing is opted for during peak periods. Dynamic pricing induces customers to buy on the least crowded days, reducing peaks while ensuring maximum efficiency without compromising the user experience."

Transparency is key and the best cashless ticketing systems clearly present pricing options including dynamic pricing with terms, preventing frustration and ensuring fairness. When guests understand their choices, they feel empowered which improves satisfaction and perceived value. Operators who prioritise clear communication and flexibility, build trust and win customer loyalty for the long-term, Steve Drake opined.



Since cashless systems reduce operational costs by eliminating or lowering hardware maintenance and upkeep, FECs that adopt such solutions are in for a win-win both from business and guest experience points of view.

"With the savings from cashless ticketing systems, operators can set dynamic pricing strategies that offer guests high-value, low-cost promotions that they can enjoy," ***Renée Welsh*** *elaborated.*

Offering a contrary opinion, Davide Camaiora emphasised that cashless ticketing and dynamic pricing are not even connected to each other.



"The biggest challenge is effective guest communication. Too little leads to confusion, while too much can be overwhelming. Finding the right balance of proactive messaging, easy-to-use support channels and ensuring guests feel heard is the recipe to smoothly address change for both guests and operators." - ***Steve Drake***

Benefits outweigh hurdles

While the benefits are obvious, asked about challenges in the adoption of cashless ticketing, Steve Drake said, "The biggest challenge is effective guest communication. Too little leads to confusion, while too much can be overwhelming. Finding the right balance of proactive messaging, easy-to-use support channels and ensuring guests feel heard is the recipe to smoothly address change for both guests and operators."

Some hurdles operators perceive possibly include the transition from manual to digital, cash to cashless/contactless, Renée Welsh added. "Technology innovation can be daunting for some, but with proper and consistent training, 24/7 support and a reliable system backed by tech partners, the benefits of cashless systems should outweigh any reservations."

The issue with cashless payment systems is the requirement for customers to actively "do something" to join the ecosystem, Davide Camaiora opined. "This can be solved by differentiating the cashless options in the same venue, letting the customer select the best option."



Will cashless ticketing enable personalised experiences?

"Like the paradigm shift of consumer experience revolution we have seen, we believe that the future is highly connected, personalised, automated and digital for operators and guests alike. This is exactly how we envisioned, designed and launched the new era of the Ticketing Ecosystem – our integrated cashless payment solutions – now updated for hyper-customisation and deeper integrations", Renée Welsh shared.

Cashless ticketing aims to get rid of the old-style wristband or PVC cards and integrate the wallet into many different media that the customer already has, like the hotel room key, the phone wallet or biometrics, Davide Camaiora observed. Hence, dynamic pricing will be more and more led by technology enhancements. First, to include external data coming from the venue, such as hotel occupancy rate, expected weather conditions or other events in the same region. Second, by enhancing the predictive capabilities, supported by ML applications and extending the quantity and quality of entries collected in the data lakes.



On his part, Steve Drake believes that personalisation is a trend that will continue to become more sophisticated, allowing guests to enjoy customised experiences without friction, extra research or complicated planning.

Operators will want to work with technology vendors who offer a strong, integrated ecosystem that seamlessly combines cashless ticketing, pricing, payments and guest engagement as this will boost overall performance for the operators willing to build and offer varied in-venue experiences by leveraging the personalisation trend.

The future outlook

The momentum towards cashless ticketing and digital payments in the MENA region is expected to continue, driven by technological advancements, supportive government policies and evolving consumer behaviours. As businesses and consumers increasingly prioritise seamless and secure payment experiences, the leisure & entertainment industry is poised for further innovation and growth in cashless transactions.



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OPINION ARTICLE

From Fun to Financial Growth: Why Entertainment Needs Smarter Insights



By **Vladan Pantelic**, Co-Founder/Chief Executive Officer - Hoick

In the world of entertainment—whether it's theme parks, water parks, family entertainment centres (FECs), or play areas—creating unforgettable experiences is paramount. Yet, while fun is at the heart of the industry, there's a critical oversight in strategic thinking. A staggering 90% of businesses globally are not translating the insights they collect daily into a cohesive picture that genuinely speaks to strategy.

Every swipe of a membership card, every online ticket purchase, and every social media post generates valuable data. These touchpoints reveal patterns such as peak visitation days, the most popular attractions, customer snack preferences, and some advanced correlation between them. However, rather than turning these insights into actionable strategies, many companies rely on gut instincts—like setting ticket prices by rolling dice.

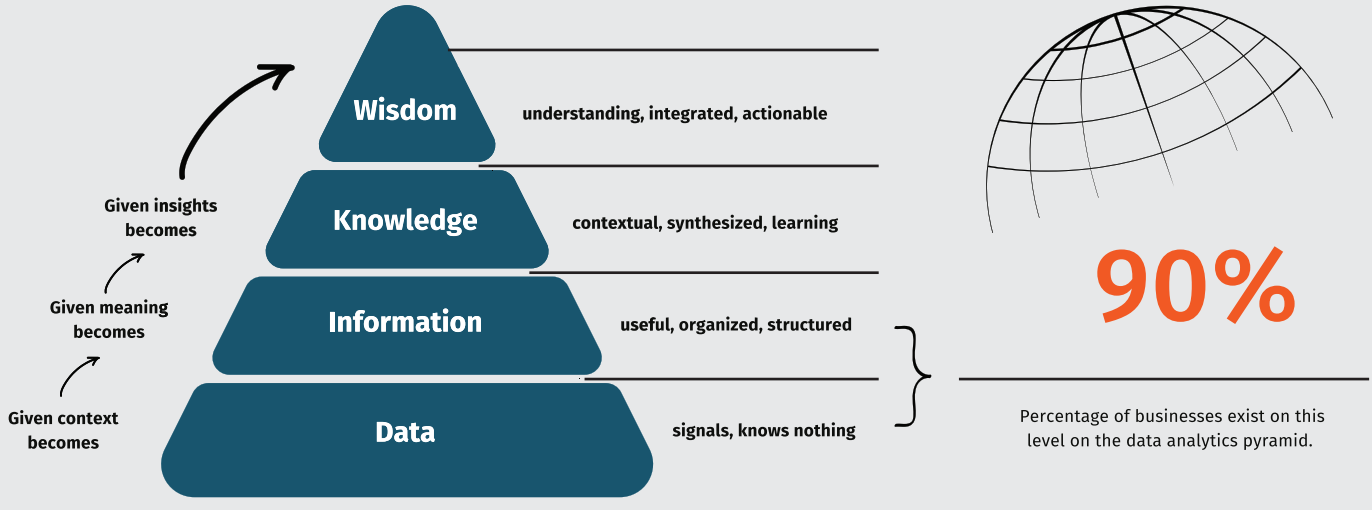
The real-world consequences of not articulating data insights are clear: missed marketing opportunities, inefficient staffing, and underutilised attractions result in lost revenue. Furthermore, failing to harness data means that key insights—from customer behaviour to employee performance—remain unexplored. Reason? Nearly 75% of industry leaders are predominantly operationally driven, often lacking the strategic business acumen necessary for long- term growth.

Inefficient decision-making:

Research from Gartner reveals that many organisations still favour intuition over data-driven decision-making. This overreliance on gut feeling often leads to missed opportunities, inefficient operations, and a heavy marketing guess game (and spending).

Profitability impacts:

According to McKinsey, companies that effectively integrate data insights into their strategic planning can experience a 6% profit increase and substantial revenue growth. Despite this, most businesses fail to harness their data's full potential, leaving valuable revenue on the table.



Operational performance:
Organisations using data to understand operational challenges and employee needs see improved staffing efficiencies and higher employee satisfaction. This leads to better customer experiences—a critical factor in the entertainment industry. (Deloitte, 2024)

The cost of ignoring data-driven Strategies

Failing to embrace data-driven decision-making doesn't just impact revenue—it creates ripple effects across the entire organisation. Consider a theme park that struggles with long wait times for its most popular rides. Managers risk frustrating guests and missing out on potential upsell opportunities without clearly understanding peak hours, customer flow, and demand forecasting. Dynamic pricing, better queue management, and promotions could all be better if only the right insights were leveraged.

Similarly, marketing teams often operate in the dark. They push out promotions without genuinely understanding the behavioural patterns of their audience. Are families visiting primarily on weekends? Do memberships drive repeat visits, or do guests prefer one-time premium experiences? Without analysing these details, budgets can be wasted on ineffective campaigns that fail to maximise returns.



The 'gut instinct' trap

Many leaders justify their reliance on instinct by citing past successes. But what worked before won't necessarily work in an industry that is rapidly evolving. The entertainment sector is no longer just about providing rides and attractions—it's about curating personalised experiences.

Consumers today expect seamless interactions, customised offerings, and real-time engagement. Businesses that continue to rely on gut-driven decisions risk falling behind more agile competitors who are making informed, data-backed moves.

For instance, Disney's MagicBand revolutionised the theme park experience by offering seamless payments, queue management, and data tracking. Every guest interaction is logged and analysed, allowing Disney to optimise everything from ride wait times to restaurant capacity. The result? Higher guest satisfaction and increased spending per visitor.

Transforming data into action

So, how can entertainment businesses transition from data collection to meaningful action? It starts with treating data as an asset, not an afterthought.

1. **Integrate real-time analytics:** Businesses should move beyond static reports and implement real- time dashboards that provide immediate insights. Understanding visitor flow, sales trends, and operational efficiency in the moment allows managers to pivot strategies on the fly.
2. **Empower teams with data literacy:** Many organisations struggle with data adoption because employees lack the skills to interpret and act on insights. Training programmes can bridge this gap, ensuring decision-makers at all levels can confidently utilise data in their strategic planning.
3. **Move from reporting to storytelling:** A pile of numbers means little without context. Businesses must craft compelling data narratives that translate raw figures into actionable strategies. This approach ensures that insights don't just live in spreadsheets but actively drive decision- making across businesses and departments.

The industry thrives on excitement and engagement, but those who fail to embrace data risk turning their operations into a guessing game. The future of entertainment isn't just about fun—it's about making fun more innovative, efficient, and profitable.

About the Author

Vladan Pantelic is a dynamic business and technology leader with over a decade of experience in driving transformative projects, delivering measurable results and fuelling growth through data-driven insights. Holding an MBA, he excels in digital strategy, experience management and business strategy, consistently turning data into impactful strategies and redefining organisational innovation. From leading large-scale projects to conducting in-depth market research that informs multimillion-dollar decisions, Pantelic delivers results that resonate with stakeholders and end users alike.



GCC Leisure Industry Consumer Sentiment Survey 2025

The Pulse Check: What This Report Is All About

MENALAC has teamed up with Hoick, a data mining software firm, to decode the vibes of the leisure and entertainment industry and customer sentiment towards the GCC leading leisure & entertainment venues. We took a deep dive into the ocean of consumer perceptions and experiences sculpting the industry's reputation and risk profiles.

With state-of-the-art text-mining software and a custom-built NLP model crafted exclusively for this research, we sifted through 2.03 million consumer data profiles across TripAdvisor, Google, and various other sources. We translated those data points into a real story that tells what makes the L&E world tick.

6
Countries

462
Locations

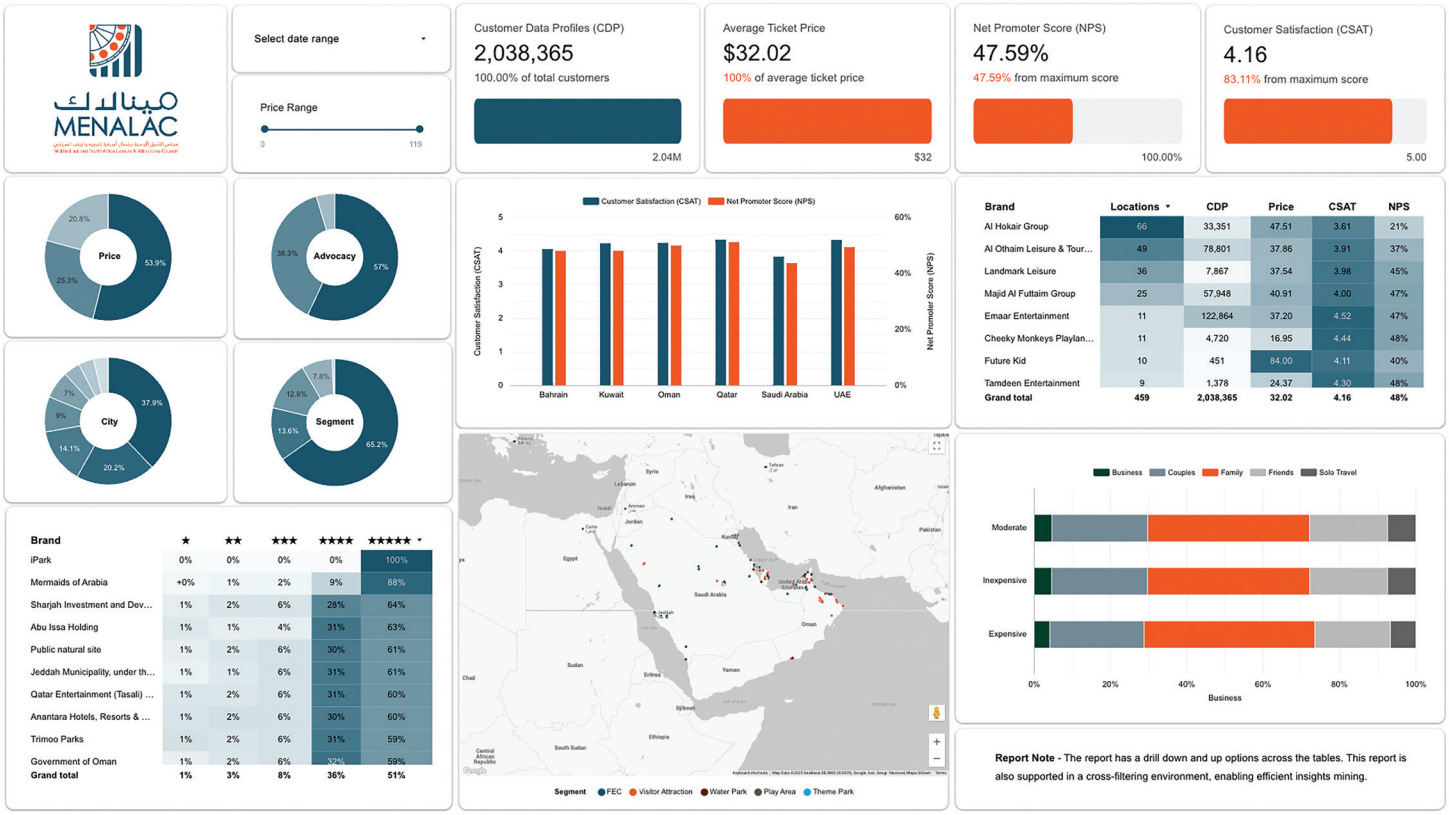
2M
Customers

This index taps into an often-overlooked source of truth—unsolicited and unstructured social media feedback—providing a quantifiable measure of the industry's performance across different areas and segments of L&E business.

NPS: This KPI measures customer loyalty by comparing the percentage of promoters to detractors. It is calculated with the formula: **NPS = % of Promoters - % of Detractors.**

CSAT: Customer Satisfaction Score measures how satisfied customers are with a product, service, or experience, typically using a **1 to 5 rating scale** to identify areas for improvement.

Note: Contact MENALAC team to get access to the below market dashboard.

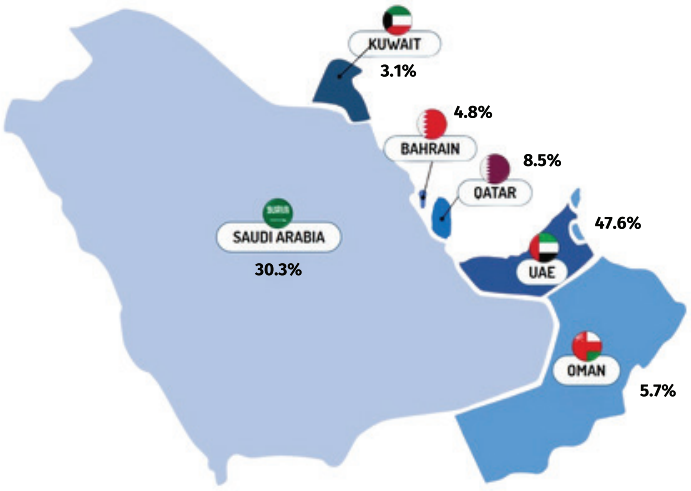


Share of Voice: Who's Dominating the Online Conversation?

In today's digital age, online conversations are the new word-of-mouth. They can make or break a business, especially in the leisure and entertainment industry, where experiences reign supreme. Understanding who's generating the most buzz online – their "share of voice" – is crucial for gauging brand awareness, reputation, and overall market dominance. Our deep dive into 2.03 million consumer data profiles across the GCC reveals a fascinating landscape of online chatter.

Country

Across all countries, there are a total of 2,038,365 consumer data profiles analyzed in this study, with the UAE leading at 970,167 (47.6%), largely driven by Dubai and Abu Dhabi. Saudi Arabia follows with 617,800 (30.3%), while Qatar (8.5%), Oman (5.7%), Bahrain (4.8%), and Kuwait (3.1%) contribute smaller shares. The UAE's dominant share highlights its prominence as a key market in the region.



Segment

Visitor attractions lead with 1,328,966 profiles (65.2%), reflecting their widespread appeal and online conversations from visitors. Family Entertainment Centers (13.6%) and theme parks (12.8%) show strong engagement, while water parks (7.8%) maintain niche popularity. Play areas (0.65%) represent the smallest segment, reinforcing the dominance of visitor attractions in consumer interest and engagement.

Waterparks, capturing 7.8% of the total conversations, exemplify the power of destination-driven experiences with Atlantis Aquaventure's single location generating 56,216 reviews (2.8%), outperforming many multi- location brands. Similarly, with just three locations, Dubai Holding secures 67,289 reviews (3.3%), reinforcing that premium, high-profile venues can generate outsized engagement.



Brand

MIRAL Experiences leads the pack with 142,153 reviews, capturing 7% of the total share of voice despite having just 6 locations—an impressive 23,692 reviews per site. Meanwhile, Emaar Entertainment follows with 122,864 reviews (6%) across 11 locations, averaging 11,169 conversations per site. Al Hokair Group operates the most locations (66) but garners only 33,351 reviews (1.6%), translating to just 505 reviews per site. Similarly, Al Othaim Leisure & Tourism Co., with 46 locations, secures 76,678 reviews (3.8%), 1,668 per site.

The real standout? Atlantis Aquaventure, with just one location, amassed 56,216 reviews (2.8%), showing that a single iconic destination can rival multi-location brands. Likewise, Dubai Holding, with only 3 locations, commands 67,289 reviews (3.3%), proving that premium destinations attract more engagement per site.

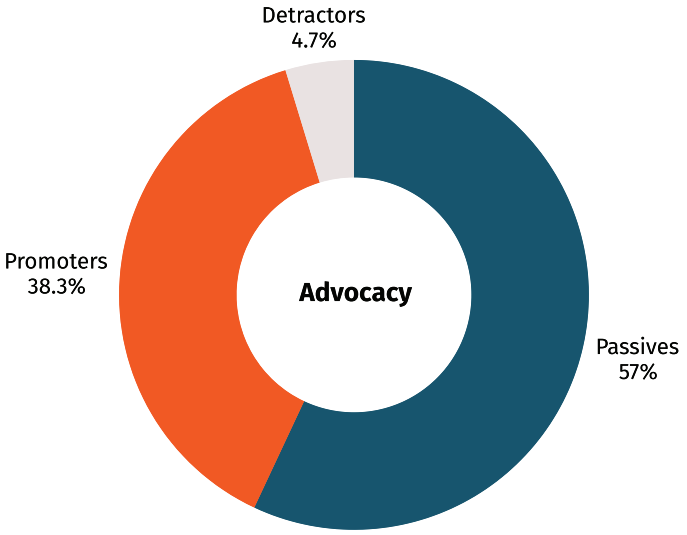
Size doesn't dictate engagement—brands that spark conversations, no matter their footprint, gain the most visibility and business impact.

First Impressions: Unpacking the L&E Story

Customer sentiment is the heartbeat of the leisure and entertainment industry, shaping brand loyalty, repeat visits, and overall market perception. In this section, we dive into key sentiment metrics—Net Promoter Score (NPS) and Customer Satisfaction (CSAT)—to understand how experiences vary across countries, segments, brands, and price categories. By analyzing these dimensions, we uncover the trends, strengths, and areas for improvement that define the L&E landscape.

Raving Fans or Reluctant Visitors?

Across leisure and entertainment locations in the GCC, customer advocacy varies significantly. 290 locations fall into the Passive category—guests who are satisfied but not excited enough to promote the experience. Meanwhile, 195 locations have strong Promoter advocacy, where customers actively recommend the venue, while 24 locations have a high number of Detractors, signaling dissatisfaction.

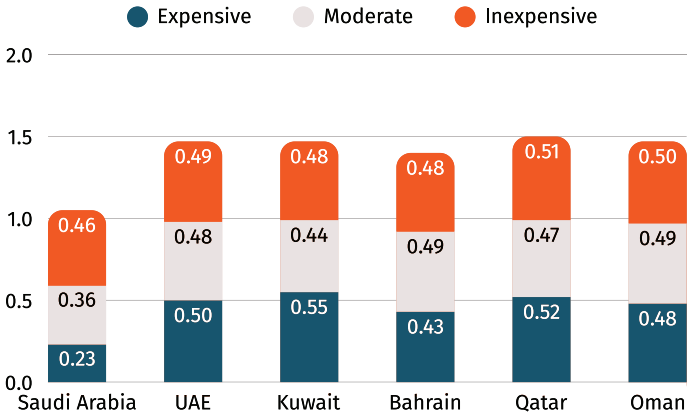


The key to shifting Passives into Promoters lies in delivering on your promise. Small but impactful improvements, such as personalized engagement and surprise perks, can enhance and elevate loyalty.

Listen, understand, and act on customer feedback—it will enhance loyalty. Define promise, deliver on your promise.

Uncovering Trends Across Price Segments

Qatar leads in NPS and CSAT across all segments, while the UAE and Kuwait also perform well. Saudi Arabia struggles, especially in premium experiences, with the lowest CSAT (3.94) and NPS (22.61%) in the expensive category. Notably, its NPS for inexpensive experiences (45.94%) is much higher, indicating unmet expectations at higher price points.



Net Promoter Score - Country and Price Category

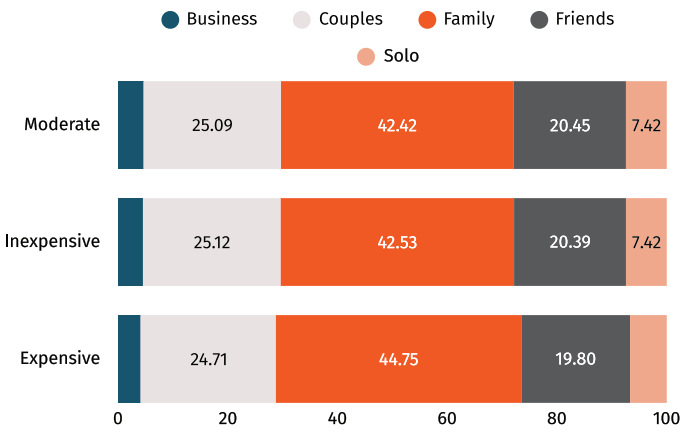
Saudi Arabia consistently has the lowest NPS across all pricing categories, with a particularly significant drop in the expensive segment (22.61%), indicating a major gap in perceived value for higher-priced experiences.

Facilities where premium experiences score lower in NPS must enhance perceived value to justify cost and improve advocacy.

Who's Winning the Hearts of Visitors?

In the world of leisure and entertainment, brand success isn't just about footfall—it's about perception, satisfaction, and the value visitors associate with their experience. This section unpacks two key performance dimensions: brand performance across Net Promoter Score (NPS) and Customer Satisfaction (CSAT), alongside visitor segmentation based on spending habits.

The battle for brand loyalty and satisfaction isn't always about scale—it's about impact. Mermaids of Arabia leads



the pack with an impressive CSAT of 4.85 and an NPS of 0.88, outperforming much larger competitors. Meanwhile, Atlantis Aquaventure attracts the highest volume of customers but ranks overall. MIRAL and Dubai Golf are playing in the high-stakes arena, balancing visitor volume and positive sentiment, while Al Hokair Group struggles with both satisfaction and advocacy, sitting at the bottom of the rankings.

Not all visitors are created equal—some prioritize affordability, while others seek premium experiences. Families dominate spending across all pricing tiers, proving they are the lifeblood of the entertainment industry. The "Moderate" category sees Family visitors leading with 125,619.81, while budget-conscious travelers flood the "Inexpensive" segment, totaling over 527,736.69 family visits. Meanwhile, the "Expensive" category reveals a telling trend—Couples and Friends travelers contribute significantly, but Family travelers still take the significant lead.



Final Take: Insights Beyond the Numbers

This section of the performance report provides a high-level snapshot of how brands fare across NPS, CSAT, and visitor spending categories. While these ratings highlight overall satisfaction and advocacy, they often lack the "why" behind the numbers. The real story lies in the sentiment—the emotions, frustrations, and delights that drive these scores.

The next part shows how to truly unlock actionable insights and why deep-diving into sentiment is key.

A sentiment-rich report unveils the raw, unfiltered truths hidden in guest feedback, giving brands the real juice they need to elevate experiences, boost loyalty, understand what truly matters to customers.

Focus on consistently delivering quality and reliability in your core services. By doing the basics right, you will build and improve brand presence.

Beyond the Score: Understanding the 'Why' Behind Ratings

For years, businesses have relied on metrics like Net Promoter Score (NPS) and Customer Satisfaction (CSAT) to gauge performance. While these ratings offer a snapshot of customer sentiment, they often fail to capture the full picture. Cultural biases, response tendencies, and surface-level scoring can mask the real drivers of satisfaction and dissatisfaction.

This is where sentiment analysis changes the game. By mining over 71,000 customer profiles and 28 million data points, we uncover what customers rate and why they feel the way they do. Sentiment mining dives beneath the numbers to reveal emotions, trends, and actionable insights, helping brands make smarter decisions beyond a simple rating scale. To quantify this, we introduce two key metrics: Sentiment Score and Importance Score. By layering them, we move beyond just understanding satisfaction—we pinpoint what drives it. Let's explore how these reveal a deeper, more accurate story than traditional ratings alone.

71k
Customers

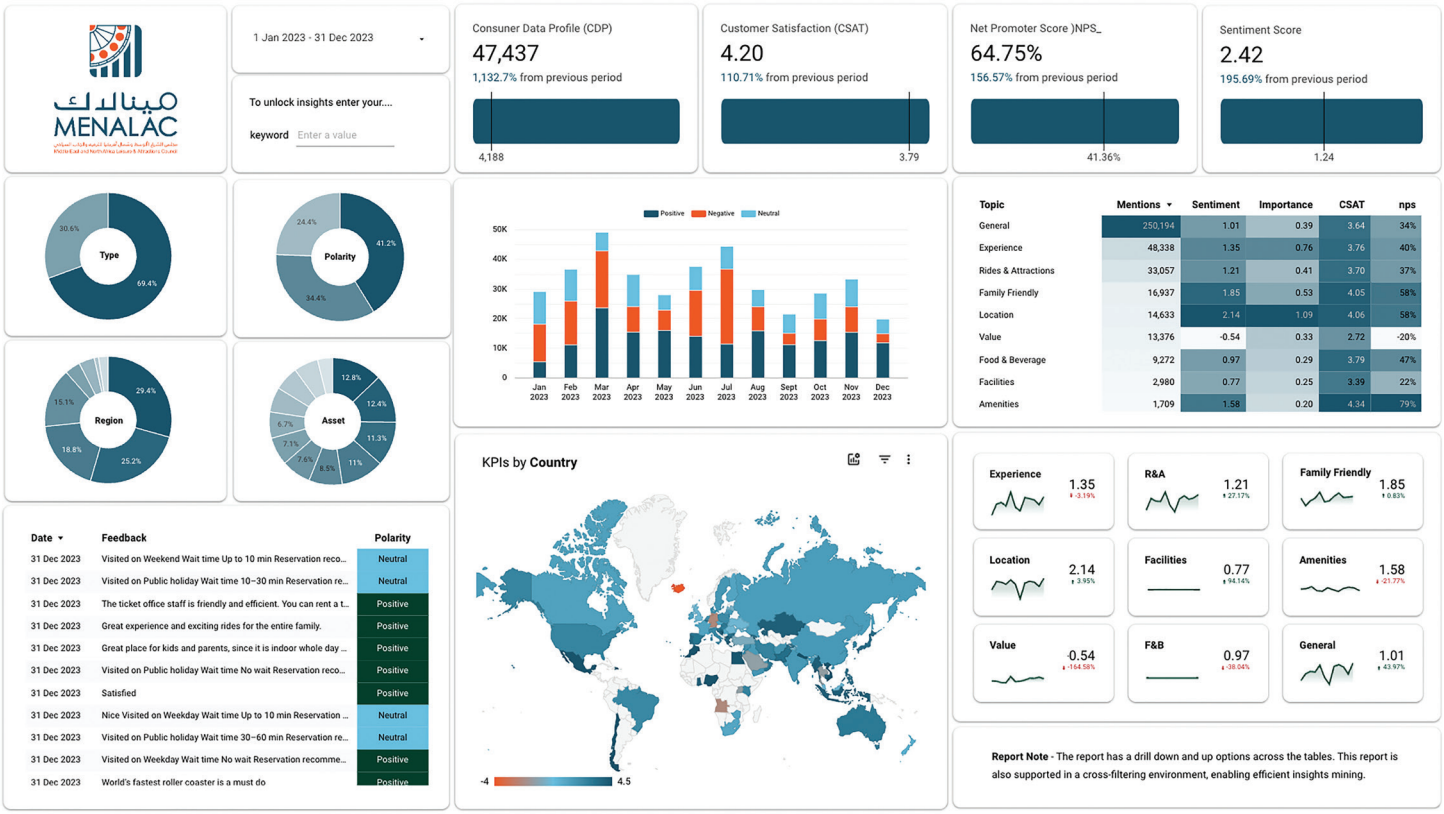
12
Locations

28M
Data Points

Sentiment: Measures customer emotions, **from deeply negative (-5) to highly positive (5)**, from minor frustrations from major pain points and casual appreciation from true delight.

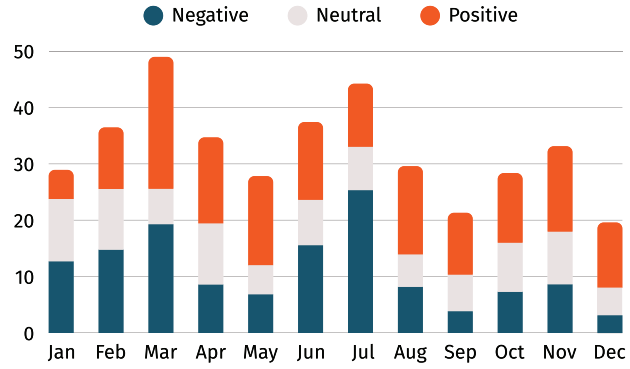
Importance: Identifies **what truly matters** to customers, highlighting key experience drivers. **Higher scores signal priorities**, while lower scores indicate less influential factors.

Note: Contact MENALAC team to get access to the below UAE detailed consumer behavior analysis..



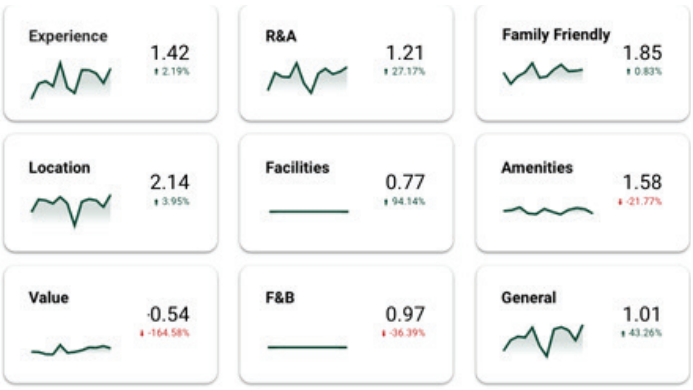
Sentiment Swings: Seasonality Impact?

There's a significant fluctuation in sentiment mentions throughout the year, with negative mentions peaking in March and July, while positive mentions peaked in November. The general trend toward more positive mentions later in the year (especially in November and December) suggests potential improvements in public or customer perception toward the end of the period.



Monthly Polarity Performance

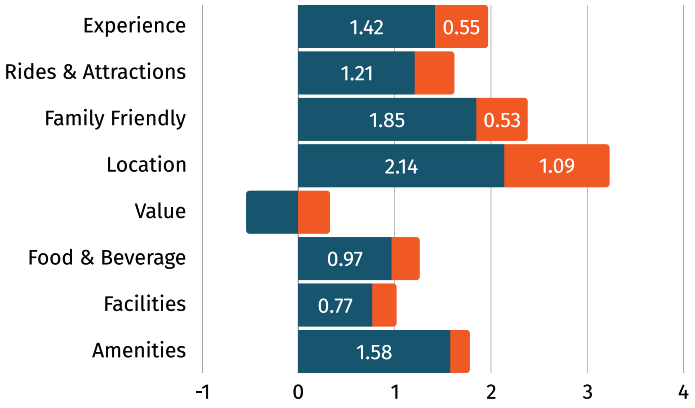
Theme Parks command 69.4% while Waterparks are at 30.6% by volume of total mentions.



Why Measuring Feelings Matters More Than Scores

When analyzing customer sentiment across key topics, it becomes clear that CSAT and NPS scores alone are not reliable indicators of customer experience. While sentiment provides a more organic measure of how people feel, rating-based KPIs often fail to align consistently with the intensity of feedback. Key Findings:

High sentiment does not always mean high CSAT/NPS. For example, Location has the highest sentiment score (2.14) but shares the same CSAT (4.06) and NPS (58%) as Family Friendly, which has a ower sentiment (1.85).



Sentiment and Importance Scores by Topic

Importance scores reveal which topics truly drive satisfaction rather than just being frequently mentioned. Location (1.09) is the most important factor, meaning it has the strongest influence on overall experience.

While Experience (0.55) and Family Friendly (0.53) are also key drivers, their impact is lower. In contrast, Value (0.33) is crucial despite having a negative sentiment, showing that pricing dissatisfaction heavily affects perception. Meanwhile, Amenities (0.20) and Facilities (0.25) have minimal importance, meaning high CSAT/NPS scores in these areas don't significantly impact overall satisfaction.

Big Picture of Customer Experience

By diving deeper into the reasons customers feel a certain way, businesses can uncover the underlying motivations and concerns that numbers alone can't capture. This deeper insight allows companies to make more informed decisions, create better products, and provide a more personalized experience that resonates with their audience.

Customer listening isn't about numbers. It's about the 'why' behind. Context KPIs don't just track performance they drive it.

Contextual KPIs don't just serve as passive metrics that report on performance, they actively shape and drive it. With this additional layer of understanding, companies can not only measure success but at the same time influence and enhance their performance, ensuring they stay aligned with customer needs and expectations.

OPINION ARTICLE

AI-Powered Personalisation Revolutionising CX



By **Kirin Sinha**, Founder & Chief Executive Officer, Illumix

In the next half-decade, artificial intelligence (AI) will fundamentally reshape visitor experiences across theme parks, attractions and family entertainment centres (FECs). These technologies will touch every part of the guest experience, from booking their experience, to walking in the doors, to coming back again. Those who effectively embrace this technology will drive transformative gains in their business, while those who don't are likely to be left behind.

Understanding the state of play

In order to map the future of guest experience, we need to understand the demographics and trends of today, focused on three critical elements:

1. Accelerating rate of technological advancement
2. Global shift towards a digitally native population
3. An increase in alternative immersive experiences



Technology today is not only advancing; it's accelerating. It took the telephone 75 years to reach 100 million users. It took the mobile phone 16 years to reach 100 million users. It took ChatGPT five days to reach one million users, reaching 100 million active users within two months of launch. The future is arriving faster than ever, and it will be those with the quickest cycle-time and built-in infrastructure to adopt these technologies that will reap the benefits.

It's not only technology that's changing, audiences themselves are evolving. In 2023, 55% of the population were digital natives, which is estimated to reach 65% in 2030. This shift to digital native is even more pronounced in the Middle East – in Saudi Arabia, 63% of the population is under 30 today. Digital natives don't just use technology; they live in it. They expect everything around them to be instant, immersive and hyper-personalised.

Theme parks are not the only places for immersive experiences today. Gaming has taken the world by storm and has foundationally shifted expectations and behaviours. Today, 80% of under-18-year-olds identify as gamers. Gamers expect to have agency in their experiences. They are the protagonist, and their actions impact the world around them. Building on these three pillars, the attractions industry should be focused on leveraging technologies such as AI and augmented reality (AR) to create physical experiences that are responsive to guests, personalised and interactive.

Core AI technologies & their impact

There are two aspects of AI that have the largest impact on the attractions industry: **Generative AI and Spatial AI.**

Generative AI models can create new content including text, images, videos, code and even 3D assets based on patterns learned from vast datasets. Key use cases include:

- Chatbots for customer service and virtual assistants
- Streamlining internal processes for marketing, coding and creative assets

For example, a family interested in thrill rides might receive a personalised route through the park, while another focused on character interactions would get a different experience. Attractions can refresh their digital experiences more frequently, keeping guests engaged with new and evolving content.



Spatial AI has the ability to understand and engage in physical environments. Key use cases include:

- Precisely anchoring digital content to physical landmarks
- Adapting experiences based on crowd density and movement patterns

- Creating AR experiences based on guest interactions, making every visit unique.



For example, visitors might see hidden characters peeking from behind real buildings, follow animated guides between attractions, or witness digital transformations of physical spaces as day turns to night.

While Spatial AI focuses on integrating digital elements into physical environments, Generative AI fuels the content that powers these immersive experiences. Together, these technologies can redefine how attractions engage guests, tell stories and create personalised, interactive worlds that adapt dynamically to visitor needs.

From storytelling to story-living

The traditional attraction model relies on physical sets, human actors, animatronics and limited interactivity. Guests are visitors in the world you create for them, and the experience is largely the same when they return.

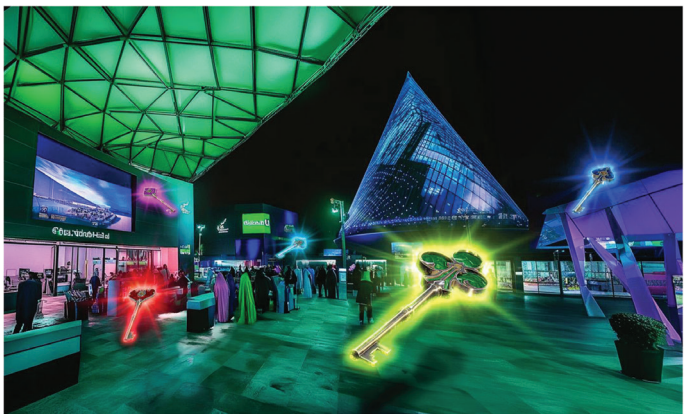
AI-enhanced AR seamlessly integrates digital content into real-world environments. It harnesses the power of AI in the physical environment to tailor live and physical experiences for visitors. Within the attractions industry, this evolution represents a crucial shift from passive entertainment to active engagement, creating experiences where visitors become protagonists in the story around them.



Attractions could solidify this concept of the guest being the central character in their story from entry. For example, magic mirror-style installations upon arrival allow the guests to see themselves transformed in line with the theming – who is your guest in the world you establish? Perhaps with a water park, they see themselves as mermaids. In addition to driving immersion, these experiences drive your social flywheel and NPS.

Guests continue the experience of being the protagonist, impacting the world around them with AI-powered AR environments:

- AR characters can respond intelligently to verbal prompts and react to guest actions. Generative AI allows us to bring full-fledged characters to life and behave in ways that would be impossible to replicate physically.
- Environments transform based on guest input. For example, simple actions from a mobile device might set off physical reactions throughout the park.
- Digital content that evolves every time guests return, creating new experiences and reasons for more frequent visits. Digital content may even move around the park to respond to real-time park data and crowd management.



These can be treated as standalone experiences or grouped together for a full gamification layer.

For attractions without established intellectual property, AI offers unprecedented opportunities. By integrating AR storytelling layers, even smaller venues can create compelling narratives that rival major theme parks. This democratisation of storytelling technology will enable FECs to create rich, immersive experiences previously available only to industry giants.

Parks are finding that strategic AR implementation can transform smartphones from distractions into engagement tools. Rather than competing with phones for attention, attractions will increasingly incorporate them as essential components of the whole experience. For example, in queue lines, guests can be kept engaged during the downtime with mini games and AR experiences in line with the theme of the ride.

Personalisation at Scale

AI's most immediate impact will be personalisation of visitor experiences. When planning a trip, AI customer service can help tailor the guest's daily agenda. In the next two to five years, AI agents will be able to make appropriate bookings for guests.

Guest data during this experience can be extended to improve their time on the ground. For example, if they're traveling in a group of three, restaurant reservations focused on parties of three can automatically appear. The AR characters will speak

to them in their native language and might wish them a happy birthday. This level of personalisation can transform one-time visitors into loyal fans.

AI companions through the mobile app allow guests to ask any relevant questions that they may need to know at the time. What is the wait time at a certain ride? When was this castle built? What sea creature am I looking at? Guests can engage with your park in new ways and even use the AR layer for visual discovery and wayfinding.

Accessibility gains

AI will also enhance accessibility, making attractions more inclusive for visitors with disabilities:

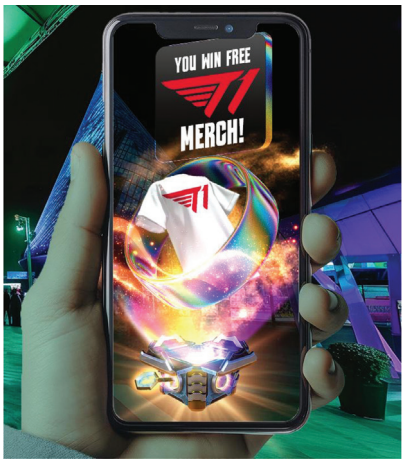
- Real-time translation for international visitors
- Audio descriptions for visually impaired guests
- Customised sensory experiences for neurodivergent visitors

These adaptations expand market reach, in addition to making it a more inclusive space.

Economic enhancement

Beyond improving guest experiences, AI can be used to improve the economic profile of any attraction.

- **Cost savings:** Developing these digitally immersive experiences saves both time and money compared to physical attractions. AR characters are labour-neutral.
- **Premium ticket tier:** AI & AR experiences can be grouped together to offer a premium ticket tier. For example, 20 physical experiences are base tier and the additional 25 interactive experiences are priced at a premium level. These can be sold as an upgrade at any time in the park.
- **Boosting return visits:** Evolving experiences draw guests to visit numerous times.
- **Tie with physical purchasable:** Unlock digital experiences with the purchase of specific objects to drive sales.
- **Increasing dwell time and conversion:** Digital experiences placed in certain locations drive dwell time near merchandise, F&B and other purchase opportunities.



Smart glasses: The future of AI

While smartphones currently serve as the primary gateway to AI & AR experiences today, the rapid evolution of smart glasses like Meta Ray-Bans and Snap Spectacles is set to revolutionise how visitors engage with attractions. These wearable devices offer several advantages:

- **Hands-free interaction:** Visitors can fully immerse themselves without holding devices
- **Continuous engagement:** The AI & AR layer becomes seamlessly integrated into the visual field
- **Natural interaction:** Eye tracking and gesture recognition allow for intuitive controls.

Theme parks can leverage this technology today by offering experiences that pair the digital and physical work through their smartphone apps and then transition to rental smart glasses that are pre-loaded with park-specific experiences. This approach also ensures consistent performance and allows parks to control the entire experience ecosystem.

Conclusion: The next frontier

The AI transformation of theme parks and attractions is not a distant possibility but an unfolding reality. Within five years, visitors will expect seamless integration of digital and physical experiences, with personalisation as a standard. The technology is ready for deployment across venues of all sizes.



The most successful operators will be those who view AI not as a replacement for traditional attractions but as an enhancement layer that makes physical experiences more engaging, personalised and memorable. By embracing this digital-physical fusion, the attractions industry can create experiences that resonate with today's digital natives while preserving the magic of shared physical spaces.

In this evolving landscape, AI doesn't diminish the importance of human creativity and storytelling—it amplifies it, giving attraction designers new tools to create experiences that would have been impossible just a few years ago. For an industry built on imagination, AI represents the next frontier in making the impossible possible.

About the Author

Kirin Sinha is a tech entrepreneur with degrees from MIT, Stanford, London School of Economics and Cambridge University where she specialised in AI. Recognised by Forbes 30 Under 30 and Inc.'s Female Founders 200, she leads innovation in spatial intelligence. Her company Illumix's AR platform enhances real-world experiences at major venues.

OPINION ARTICLE

Tech Innovations Reshaping the Leisure Landscape



By **Kevin Williams**, Founder, KWP

Tech-driven, immersive location-based entertainment is set to redefine the leisure and attractions landscape. Beyond the current virtual reality (VR) and augmented reality (AR) applications, emerging tech pieces promise to revolutionise the future of theme parks and attractions, water parks, holiday resorts, family entertainment centres (FEC) and more.

From extended reality to frictionless interaction

Currently we are embracing Extended Reality more commonly labelled as XR (along with some using the Extreme Reality term) in the sector, covering the scope of immersive technology.

This XR approach has superseded the previous interest in VR – looking beyond tethered headsets and backpack PC's. Approaches that promised big but have generally failed to deliver the all-important return on investment. Numerous issues have been noticed with applying all-invasive headset systems in commercial entertainment ranging from discomfort to hygiene and operational limitations.

VR still attempts to try and adapt to the market needs, pivoting from fully immersing the user; the technology has been adapted to Mixed Reality (MR) and AR. Capturing real world vision and superimposing virtual elements into the view as if real. We see the use of slimmed down smart glasses and compact headsets. This technology seeks to lower the level of encumbrance experienced by the user, while still immersing them. Holographic experiences have been developed towards deploying immersive exhibitions – captivating large groups of users, so offering a better revenue stream.

The XR application in water parks and resorts have seen developers create a series of VR systems for application in water such as on floom rides, turned into immersive rides and deployed in conventional pools. It transports the user into a virtual environment while floating in the water, with waterjets simulating the virtual movement. But the market is now pivoting away from having to wear headsets or



glasses for a completely frictionless application to immerse groups. The benefits of addressing guest concerns about hygiene and messing hair and makeup – along with operator concerns regarding staffing and temperamental hardware operation – has driven this move.

This has seen the industry look towards a future of unencumbered immersion of the guests via the use of the latest projection and high-end LED screen technology. Immersive enclosures that also track the movement of the players within the space, through Computer Vision, representing the guest's activities within the virtual experience. The lack of any headset or worn tracking device are compelling reasons for their interest for commercial entertainment. Projection is being usurped by immersive displays, as they offer brighter and more compelling visuals, and do not need to be operated in low light levels. Fundamentally, frictionless tech is better configured for commercial entertainment application.

From mixed reality to phygital environment

Regarding frictionless XR, we see the whole environment that the guests inhabit painted with digital light, rather than just the vision of the users (through a headset) or an individual display (through a game system). What has become known as the future of the theme park sector and beyond is the term 'phygital.'



A construct of the melding of the physical space wrapped in digital imagery and interaction offers a new level of engagement and creativity for the guest and developers. The use of the latest projection and digital screens to wrap the environment means that the space can be digitally painted with whatever level of engagement, from immersive exhibitions to compelling interactive game experiences. The deployment of gamification through interaction and scoring, pulling the audience into enjoying the experience to a level that generates repeat visitation.

However, there is a flip side – the technology to-date has been compelling, but with no repeat visitation value – what many describe as a "one-and-done" experience. The inability to generate repeat interest has been an expensive and wasteful undertaking for previous park projects in the territory that are foundering through dwindling audience attention.



Phygital is not limited to conventional display technology, but is employed along with gamification, turning the whole play space into an interactive adventure. As seen with 'Super Nintendo World' (in Japan and America), unique intellectual properties (IP) can be taken from their digital world and deployed into the physical space. A space that can be turned into a game that the guest can interact within. From treasure hunts with animated figures, to the use of tracked elements of the space, linked to wristbands, accruing scores through interaction attractions.



The physical activities linked to gamification are also applied to playing styles – this seen through the growth of Active Entertainment. What previously had been known as 'Xergaming' (exercise systems combining game elements), active gaming brings a level of physical exertion to the play space, offering a means to bring fitness to the



entertainment experience. Married to immersive display environments, active entertainment is growing in popularity, standing alongside previous active experiences such as trampoline and climbing walls. The added drawing power is the game element with guests building up scores for this activity, competing within these spaces.



From artificial intelligence to digital twin

In the creation of digital play spaces, the need to develop synthetic environments can be an expensive, complex and laborious process. What was previously covered as Machine Learning (ML), is now seen under all-encompassing artificial intelligence (AI). This application allowing a multitude of elements to be computed to create lifelike vistas and amazing re-creations of actual environments.

The phygital environment needs sophisticated data collection to achieve the level of gamification and engagement. The ability of AI algorithms to compile this data and calculate guests' engagement needs is driving much of the thinking behind these developments. At the same time, the need for operators to be able to manage the space (both front and back of house), also needs sophisticated monitoring. This is where the creation of Digital Twins is being applied.

Sophisticated virtual re-creations of the physical structure receiving real-time information from the actual property, applied to the virtual model. This approach allows the advance simulation of guest's activities. Information that can help in menu selection and food preparation, staffing and charting players preferences, along with data that will be employed in steering autonomous serving through the support of robots and drones.

From a guest's perspective, what is usually referred to as AI can also be described as ML algorithms, using computational power to create text, image and animations. For the out-of-home entertainment sector, we are beginning to see AI employed in queuing and guest photo capture creating customisable AI generated renderings of the guest's likeness. Queue management solution kiosks offering a unique guest take-away and generating memories customised to the guests' preferences. Future applications will see complete guest videos created based on captured images and their preferences. New AI tools are working towards offering customised guest videos and social media takeaways, essential to generate compelling engagement and building on drawing guests (and their social groups) to return to the venue.

What previously would be beyond the budget of conventional entertainment venues, the constant creation of unique game content and ride experiences tailored in real-time for the preferences of the audience are now made achievable using AI algorithms. Procedurally generated experiences offer the ability for AI to streamline the development process. It is expected that we will see venues in real-time using this development pipeline to accelerate the ride-film, media attraction and game creation process. With this, in creating unique content, we are also able to inject into the process the inclusion of IP and branded elements. Operators will be able to integrate game characters, movie properties and even toy and fashion brands, into the experiences represented within the phygital environment. The ultimate billboard not forced down the guests' throats but seamlessly blended into the experience – changeable at the click of a mouse.

In summation, from our unique observations we see that the MENA leisure & entertainment sector at a pivotal point of development. The next generation of entertainment spaces will now have to embrace much of the trends we have charted as the new generation of visitor demands a high level of engagement and interaction with their space.

The need to incorporate brands and gamification within the same space is just one element. There is also a crucial need to develop spaces that are sustainable and eco-friendly, which are expected to drive much of the investment in future developments. The ability to use technology to both drive the guest engagement but also monitor and customise the space to their needs can only be achieved through embracing these new approaches. All this will drive future investments into the next-generation of the out-of-home entertainment landscape.

About the Author

Kevin Williams is a leading expert in immersive out-of-home entertainment assisting international clients to develop immersive and interactive entertainment technology and facilities. He publishes The Stinger Report, advises global clients and speaks at global industry events. A prolific writer, he authored The Out-of-Home Immersive Entertainment Frontier, with a second edition forthcoming, shaping the future of interactive entertainment.

OPINION ARTICLE

Evolution of Entertainment in Retail



By **Phil McArthur**, Founder and Chairman, McARTHUR Retail Development Specialists

The role of entertainment in retail has evolved significantly over the past three decades, shifting from a secondary attraction to a core component of the shopping experience. This transformation reflects changing consumer preferences, advancements in technology and the competitive pressures of an evolving global retail landscape. As department store anchors decline, entertainment attractions have emerged as key solutions for developers looking to anchor new malls or revitalise existing ones.

With the global decline of the department store format and the growth of e-commerce, the leisure & entertainment industry has helped define the mall of the future. In many cases it can be argued that leisure & entertainment concepts combined with the growth of food & beverage (F&B) in malls has saved the industry.

The rise of entertainment in retail

Entertainment enhances the shopping experience, making malls more than just retail hubs – they become destinations for socialisation, leisure and family outings. Leading this transformation is the Edmonton, Canada based Triple Five Group, a pioneer in integrating large-scale entertainment into shopping centres.

West Edmonton Mall, open since 1981, set the stage with a 40,000 square metres (sqm) family entertainment centre (FEC) and an indoor beach and water park, which was an ambitious move in a landlocked Canadian province. In 1992, Mall of America introduced Camp Snoopy and other innovative attractions, shaping the modern mall entertainment model. More recently, the 2020 opening of the American Dream Mall in East Rutherford, New Jersey, took this trend even further with 280,000 sqm of retail space and 24 distinct entertainment attractions on 55% of the total Gross Leasable Area(GLA). The key attractions include DreamWorks Water Park, Nickelodeon Universe Theme Park, Big Snow (Ski) & Dream Wheel (Ferris Wheel).

Impact of entertainment in the GCC region

In the 1980s, malls in the GCC were primarily shopping-focused, anchored by department stores and small retail outlets. Entertainment's footprint began modestly with Sindbad's Wonderland, a small arcade that opened in Al Ghurair Centre, Dubai's first regional mall.

By the 1990s, the rise of FECs and cinemas began reshaping the mall experience. The Majid Al Futtaim



West Edmonton Mall


American Dream Mall

Group led this charge with its homegrown Magic Planet FEC concept and VOX Cinemas, responding to the increasing demand for entertainment and social experiences. Dining options also expanded, transforming malls into social and culinary destinations.

Today, entertainment is an integral part of the region's premier shopping centres. Iconic attractions such as Ski Dubai at Mall of the Emirates, Dubai Aquarium & Underwater Zoo and Dubai Fountain at Dubai Mall, and Ferrari World at Yas Mall illustrate how entertainment can define a retail destination. These offerings not only attract visitors but also extend their time spent in malls, increasing spending across retail, F&B and services.

Here's a quick look at some excellent examples of leisure & entertainment driven retail developments in the MENA region:

- **Dubai Mall** – Dubai Fountain, Dubai Ice Rink, KidZania, 26-screen Reel Cinemas, Dubai Aquarium & Underwater Zoo, Play DXB
- **Mall of the Emirates** – Ski Dubai, VOX Cinemas, Magic Planet, Community Theatre
- **The Avenues, Kuwait** – VOX Cinemas, VR Mania, Tekzone, Quest, Magic Planet, KidZania, Below Zero
- **Mall of Qatar** – XtremeLand, Novo Cinemas, KidsMondo, Oasis Performance Stage, Bowling
- **Red Sea Mall, Jeddah** – VOX Cinemas, Tekzone, Sparky's, Adventura.

Strategic considerations for entertainment in retail

While entertainment has proven to be a powerful tool for enhancing the retail experience, it is not a one-size-fits-all solution. Developers must carefully evaluate factors such as mall size, market competition and trade area potential before integrating entertainment elements.

A well-planned entertainment strategy can significantly boost foot traffic and the overall mall performance, but poor alignment with market conditions can lead to underwhelming results.

The future of entertainment in retail

Despite early predictions that e-commerce would render malls obsolete, entertainment and dining have injected new life into retail centres. The next wave of retail entertainment is set to focus on immersive experiences, including sports-based attractions, augmented reality (AR) and virtual reality (VR) technologies, interactive media, e-gaming and live entertainment. These innovations promise to keep malls relevant, dynamic and appealing to the next generation of consumers.

As shopping centres continue to evolve, entertainment will remain a key factor in their success, reinforcing their role as vibrant community spaces rather than just places to shop. The future of retail lies in experience-driven environments, where entertainment plays a central role in shaping consumer engagement and loyalty.

About the Author

An industry veteran, Phil McArthur has over 40 years of global expertise in retail real estate. He has led strategic retail developments across the Middle East, North America, North Africa and Asia. After working with companies including Brookfield, Ivanhoe Cambridge, Majid Al Futtaim Shopping Malls and Al Futtaim Real Estate, he established his advisory company in 2011.

OPINION ARTICLE

GCC Leisure, Entertainment, Tourism and Culture – A Revolution in Progress

By **Neha Tayal**, Director, Strategy & Transformation and **Priyesh Kapadia**, Partner, Advisory Services, UHY James





The Gulf Cooperation Council (GCC) is witnessing a paradigm shift in its leisure, entertainment, tourism and cultural sectors; rapidly cementing its position as a global leader. Through visionary investments, innovative technologies and sustainable practices, the GCC is evolving into a destination that seamlessly blends heritage with modern allure.

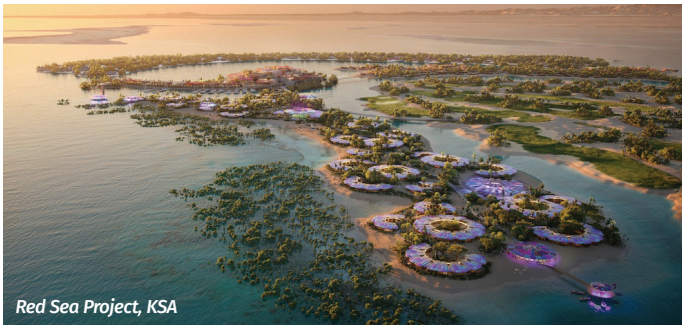
Bridging traditions with tomorrow: The GCC's transformational journey

The GCC's journey into global tourism prominence is underpinned by ambitious projects and futuristic national visions. As per reports, the UAE welcomed over 28 million international travellers in 2023, while Saudi Arabia targets 150 million annual visitors by 2030 under its Vision 2030 framework. Iconic projects like the UAE's Louvre Abu Dhabi and Saudi Arabia's Diriyah Gate showcase a commitment to preserve the region's rich cultural heritage while offering world-class experiences. In addition, Qatar's Lusail Entertainment District and Oman's eco-tourism resorts amplify the region's diversified portfolio.

Economic diversification: The core driver

The GCC nations are placing leisure and tourism at the forefront of their diversification strategies to reduce reliance on oil revenues. Over $100 billion has been invested in entertainment infrastructure, with key players like Saudi Arabia and the UAE spearheading this transformation.

• **Saudi Arabia's Vision 2030:** Besides the well-known Red Sea Project and Diriyah development introduced in 2017, KSA has launched Soudah development for people attracted towards mountainous landscape and the Mukaab structure that is designed to incorporate immersive digital and holographic experiences.



Red Sea Project, KSA

• **The UAE's Leadership:** Projects like Ras Al Khaimah's $1 billion luxury casino resort (scheduled to open by 2027) are redefining global tourism benchmarks. This project, especially, is expected to transform the once quiet fishing and pearl-diving town into a high-end luxury real estate destination, attracting high-spending international visitors and creating thousands of jobs.



Wynn Al Marjan Island, Ras Al Khaimah

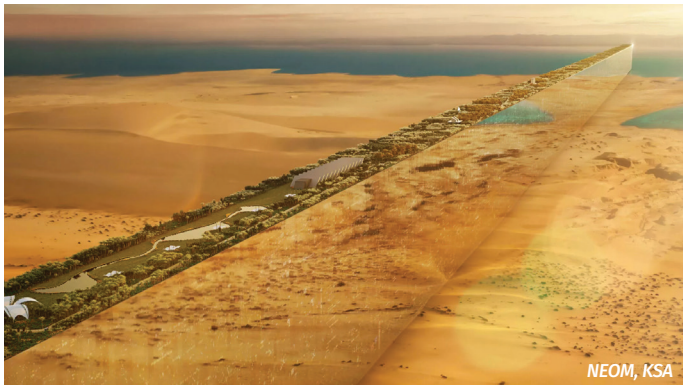
• **Oman's diverse natural landscape:** Oman is focused on luxury resorts and eco-tourism to attract global visitors. Sustainable and luxurious development of the country's diverse natural landscapes is expected to attract eco-conscious travellers thereby generating jobs across the hospitality, conservation and tourism sectors while benefiting the local communities.



Salalah landscape, Oman

GCC landscape shaped by iconic mega projects

Following are some of the world's most ambitious and unique offerings shaping the entertainment ecosystem in the GCC.


NEOM, KSA

• **NEOM (Saudi Arabia):** Spanning 26,500 square kilometres (sq km) and expected to cost $320 billion for the phase 1 development by 2030, this smart city is blending artificial intelligence (AI)-driven services and immersive entertainment facilities, promising to attract high-end travellers with luxury island resorts, skiing and outdoor adventures.

• **Ras Al Khaimah's Casino Resort (UAE):** This is the GCC's first commercial gaming resort which will feature casinos, luxury hotels and entertainment hubs. The city has already delivered some of the most luxurious sea-facing apartments in the world and the demand is only expected to go northwards with the opening of the Casino resort.


Lusail Entertainment District, Qatar

• **Lusail Entertainment District (Qatar):** A $45 billion project with state-of-the-art sports venues and e-sports arenas. With the rise in tourists visiting the sports events, theme parks and waterfront attractions, the economy is expected to generate more jobs and opportunities in hospitality, entertainment, retail and real estate sectors.

Entertainment: From gaming to adventure

Fun and leisure are not restricted to a limited segment of people in the GCC as it offers facilities and experiences for a diverse mix of audiences:

• **Gaming and E-sports:** Saudi Arabia has invested over $38 billion in gaming and e-sports. In 2024, it hosted the E-sports World Cup with record-breaking prize pools. With each passing year, the number of e-sports gamers and enthusiasts participating and visiting the arena is only expected to grow higher.

• **Sports Tourism:** Leveraging its FIFA World Cup success, Qatar is focusing on sports-based events like the FIFA U17 World Cup 2025 and Formula 1 Grand Prix. All these events being internationally popular, attracts millions of visitors that is expected to transform the retail, dining and hospitality landscape of the country.


Formula 1 Grand Prix, Qatar

• **Eco Tourism:** Oman's eco-resorts are being designed to combine luxury with sustainability. This is expected to attract eco-conscious travellers from Europe and Asia thereby supporting small businesses, handicrafts as well as international eco-tourism investors.

• **Adventure Tourism:** UAE's Hatta and Jebel Jais offer thrilling, curated experiences for visitors. Jebel Jais, for example, has already become a top destination for thrill and adventure seekers. With the addition of more complementary activities, visitor numbers are expected to rise, driving significant infrastructure upgrades including hospitality, retail and dining experiences.

Transformative and strategic marketing campaigns

Smart and innovative marketing campaigns are showcasing the GCC's offerings to a global audience. Few examples include:

• **Saudi Arabia's 'Saudi Welcome to Arabia'** has partnered with celebrities like Lionel Messi and Alicia Keys to highlight the country's desert wonders and heritage. Through this the country is expected to attract over 150 million tourists annually by 2030.

• **UAE's 'Dubai Destinations'** showcases the unique aspects of Dubai at different times of year and endeavours to attract tourists throughout the year.

• **Qatar's 'Experience a World Beyond'** highlights the country's diverse attractions including its rich cultural heritage, modern architecture and adventure experiences. Utilised across 17 key markets primarily in Europe, this campaign aims to attract over 6 million international visitors annually by 2030.

Sustainability and technology: The future of tourism

In addition to the above, the GCC nations are streamlining their focus on integrating sustainability and technology to enhance visitor experiences:

• **Sustainable Tourism:** The Red Sea Project aims for carbon-neutral luxury powered by solar energy. With the sustainable tourism market growing at a rate of 14% annually, these projects are expected to attract more tourists from countries like the US, Germany and China. Luxury and premium hotel chains are expected to develop sustainable properties to cater to eco-conscious travellers.

• **AI and Blockchain:** Smart apps using AI deliver personalised recommendations that enhance eventgoers' experiences and boost satisfaction, while blockchain ensures seamless, secure bookings and protects customer privacy. Hotels, restaurants, airlines and entertainment sectors are experimenting with these advanced technology tools to improve the experience of tourists.

• **VR and AR:** Augmented reality (AR) and virtual reality (VR) are being implemented by facilities across the leisure, entertainment and culture spectrums in museums, galleries and theme parks to increase the engagement and provide immersive experience to customers. VR Park in Dubai Mall is one of the first attractions that gained immense popularity among Gen Z and millennials.

Global competitors

The GCC region ranks among the top in various entertainment categories as seen below.

Category	GCC	North America	Europe	Asia
Leisure & Entertainment	#1 fastest growing region in luxury tourism & entertainment	#1 for established global theme parks (Disney, Universal Studios)	#1 for cultural tourism, museums and historic sites	#3 for experiential travel (Japan, China, South Korea)
Technology in Entertainment	#3 in tech enabled experiences	#1 in digital entertainment	#2 in virtual events space, with its digital entertainment sector projected to grow significantly	#2 for tech-centric experiences, especially in Japan and South Korea
Consumer Preferences	#1 fastest-growing region for luxury tourism and immersive travel experiences, driven by iconic projects and substantial investments	#1 in customised and personalised travel experiences	#2 for eco-tourism and cultural explorations	#1 for budget friendly experiences, adventure tourism

The game-changers

Projects such as Ras Al Khaimah's Wynn Al Marjan Island, NEOM's Asian Winter Games and FIFA World Cup 2034 are set to redefine global expectations. These developments combine innovation, luxury and sustainability to create a diversified leisure portfolio that caters to evolving consumer tastes. These projects, with investments on the order of tens of billions of dollars, are expected to redefine possibilities and experiences while creating thousands of job opportunities across construction, hospitality, technology and entertainment sectors.

Conclusion

The GCC is no longer an emerging player in leisure & entertainment; it is a global trendsetter. By blending rich heritage with innovation, sustainability and world-class experiences, the region is reshaping the global tourism landscape. Projects like Lusail Entertainment District, Wynn Al Marjan Island and The Red Sea Project are rewriting the rules of leisure & entertainment in the GCC – positioning it as the ultimate playground for the world.

About the Authors:

With 24+ years of audit, advisory and consulting experience in India, the UAE & abroad, Priyesh Kapadia brings robust technical insights in the realm of business valuation, financial due diligence, corporate finance & feasibility studies across diverse business sectors, aimed at helping organisations expand horizons.

Neha Tayal brings 18+ years of technical insights and industry experience across India, the US, Europe and the UAE in engagements related to feasibility study, market research, market entry and expansion, strategy & transformation, trade missions, B2B matchmaking and business planning across the private sector and in collaboration with government bodies.

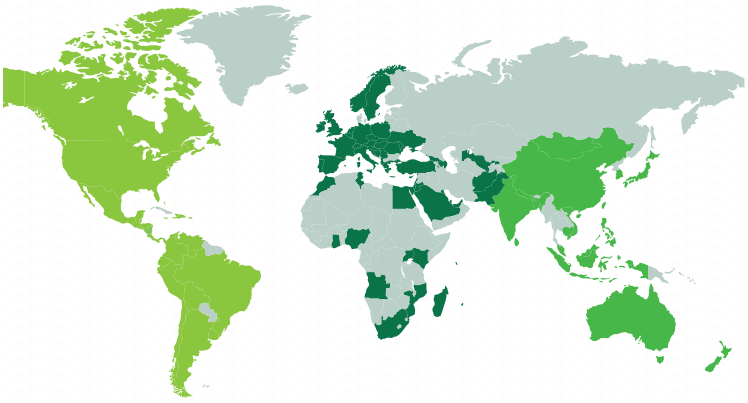
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Company Incorporation
- Business Setup
- Company Liquidations
- Tax Residency Certificate
- Trademark Registration
- Visa Assistance

Intellectual Property-Trademark (TM)
- TM Search
- TM Registration
- TM Renewal
- TM Recordal Licensing

Direct Tax
- Corporate Tax Advisory and Compliances
- Transfer Pricing Advisory and Compliances
- ESR Advisory

Indirect Tax
- VAT Advisory and Compliances
- Tax Audit Assistance
- Excise Tax Advisory and Compliances

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Rendered image of proposed Dragon Ball Z Theme Park, Qiddiya City, Saudi Arabia

DIAMOND ADVERTISER FEATURE

BAAN Holding: Fuelling KSA's Leisure & Entertainment Landscape



Jamil Malik
General Manager for Entertainment, BAAN Holding Group

At the forefront of Saudi Arabia's booming leisure and entertainment sector, BAAN Holding – erstwhile Al Hokair Group with a legacy spanning over five decades – continues to play a pioneering role as a catalyst for transformation in the Kingdom's rapidly evolving amusement landscape. Through a bold fusion of culture, heritage, innovation and technology, BAAN Holding has been curating and delivering next-generation experiences that align with Saudi Vision 2030, thereby fuelling the Kingdom's evolution into a global entertainment powerhouse. With a sharp focus on emerging consumer trends and strategic global partnerships, BAAN Holding is launching groundbreaking indoor entertainment concepts and intellectual property (IP)-driven leisure destinations.

*In an exclusive interview for the **MENA Leisure Report 2025**, **Jamil Malik**, General Manager for Entertainment, BAAN Holding shared how by seamlessly blending heritage with cutting-edge innovation, the company is setting new standards for entertainment, driving tourism, creating vibrant communities and shaping the future of leisure & entertainment not just in KSA but across the region.*

Can you introduce BAAN Holding as a key player in the leisure and entertainment industry in KSA?

Driven by innovation and strategic investments, BAAN Holding stands at the forefront of the Kingdom of Saudi Arabia's (KSA's) thriving leisure & entertainment sector. Our projects blend culture, entertainment, heritage, knowhow and technology to craft unique experiences, aligning with the Saudi Vision 2030 that aims to catalyse economic diversification and social enrichment.

How is BAAN Holding leveraging its expertise to address market needs in KSA?

We closely study evolving consumer trends and partner with global leaders to bring cutting-edge leisure & entertainment concepts to the Kingdom. Our deep market understanding allows us to tailor entertainment experiences that resonate with the local culture while offering international standards of service.

What makes BAAN Holding stand out in the regional leisure & entertainment sector?

Our commitment to innovation, authenticity and community engagement sets us apart. At BAAN Holding, we seamlessly merge tradition with modernity, selecting experiences that not only entertain but also encourage social connections and enrich local culture. Each guest holds at least one special memory in our various locations.

What future projects and innovations can we expect from BAAN Holding?

We're launching a new line of indoor proximity entertainment concepts and three massive IP-driven family entertainment destinations. These projects will prioritise interactivity and digital integration – again, something that's aligned with Saudi Vision 2030, designed to elevate the region's positioning in entertainment.

How does BAAN Holding envision the evolution of the leisure & entertainment sector in KSA, and what are your expansion plans?

We see KSA becoming a regional entertainment hub, driven by youth demographics and growing tourism. As for BAAN Holding, we plan to expand across major cities across the Kingdom, introducing homegrown and international concepts that support job creation, tourism growth and sustained community engagement.



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EDITORIAL FEATURE

MENA's Roadmap to a Resilient Economic Future



By **Rupkatha Bhowmick**, Editor, MENA Leisure Report 2025

Growth in the Middle East and North Africa (MENA) region is projected to accelerate from an estimated 1.8% in 2024 to 3.4% in 2025 and 4.1% in 2026, according to the World Bank. Meanwhile, the International Monetary Fund (IMF) attributes the expected 2025 rebound to higher oil production, stronger performance in the non-oil sectors and a reduction in geopolitical tensions in certain pockets.

According to the World Bank's January 2025 'Global Economic Prospects Report', fiscal growth in the MENA region is expected to rise to 3.4% in 2025 and 4.1% in 2026, largely due to a gradual increase in oil production, even though the 2025 outlook has been revised downward by 0.8 percentage points. Similarly, growth in the GCC countries is projected to reach 3.3% in 2025 and 4.6% in 2026, despite the 2025 forecast being lowered by 1.4 percentage points. These downward revisions stem from the Organization of the Petroleum Exporting Countries (OPEC+) members extending voluntary oil production cuts, which had previously been expected to end in 2024.

As the region moves towards "resilient recovery," the Kingdom of Saudi Arabia (KSA) is expected to play a key role with its economic growth forecast to accelerate to 3.3% in 2025, up from 1.3% in 2024, according to the IMF. This projected rebound is expected to be largely driven by anticipated increases in oil production as OPEC+ constraints are eased. The resulting boost in oil output is set to enhance domestic economic activity and strengthen government revenues, paving the way for increased public spending and investment.

For example, Saudi Arabia's Ministry of Finance estimates a 7% rise in public spending in 2025, with a budget of $295



Neom The Line, Saudi Arabia



Morrocco, co-host for the 2030 FIFA World Cup

billion. Meanwhile, the UAE's Ministry of Economy has announced plans to boost infrastructure investment by $25 billion in 2025, with a focus on transport and renewable energy initiatives. This increased investment is expected to have a positive ripple effect across the wider MENA region supporting growth in both oil-related and non-oil sectors.

Focusing on the non-oil sectors, the Middle East's travel and tourism industry is poised for "exceptional" growth, as highlighted in the World Travel & Tourism Council's (WTTC) latest Economic Impact Research report. The sector is projected to generate 400,000 new jobs by 2025, increasing total employment to 7.7 million, up 5.2% from 7.3 million in 2024 and 16.8% above pre-pandemic levels in 2019. By 2035, the sector is expected to contribute $522 billion to the region's economy, making up 11.5% of the Middle East's GDP, with an annual growth rate of 3.6%, surpassing the broader regional economic growth of 2.6%.

A reason why MENA countries – particularly the UAE, Saudi Arabia, Qatar, Oman, Morocco and Tunisia, among others – are intensifying efforts to bolster tourism revenues through strategic investments, regional collaboration and policy reforms such as the proposed unified GCC visa to facilitate seamless travel across the GCC countries.

The UAE continues to lead with Dubai, Abu Dhabi and Ras Al Khaimah expanding luxury, cultural and eco-tourism offerings. Notably, the UAE ranks among the top 10 globally for international air connectivity, with 88.9 million inbound seats projected for 2025. Saudi Arabia is rapidly transforming its tourism landscape with mega-projects including NEOM and AlUla. The Kingdom is expected to reach 43.1 million international air seats by the end of 2025, reflecting a 5.2% annual increase.

Qatar continues to build on the momentum from the 2022 FIFA World Cup by enhancing its tourism infrastructure with new hotels and attractions. The Qatar National Tourism Sector Strategy 2030 aims to attract over 6 million tourists annually by 2030. On the other hand, Oman is focusing on sustainable tourism, developing eco-friendly projects to attract environmentally conscious travellers.

Beyond the GCC, Morocco achieved a record 15.9 million tourists in the first 11 months of 2024, a 20% increase from the previous year. The country aims to reach 17.5 million visitors by 2026 and 26 million by 2030, coinciding with its role as a co-host for the 2030 FIFA World Cup.

However, despite such positive outlook, several risks remain, including escalating armed conflicts, rising policy

uncertainty and unexpected shifts in global policy. Additionally, delays in increasing oil output by key exporters, ongoing global inflation, tighter financial conditions, social unrest and extreme weather events could hamper growth.

The IMF has highlighted several challenges that may impact the MENA region's economic outlook in 2025, with inflation emerging as a primary concern especially in countries such as Egypt. Surging food and energy prices have weakened household purchasing power and raised the cost of living in Egypt. The Central Bank of Egypt forecasts inflation to rise to 15% in 2025, up from 13% in 2024, mainly due to ongoing supply chain disruptions and increased import expenses. To combat inflation, the IMF has recommended targeted interventions, including strengthening supply chains, boosting agricultural output and offering well-directed subsidies to support vulnerable populations.

Overall fiscal policies across the MENA region are projected to have a neutral impact on growth in 2025, with fiscal deficits remaining relatively stable, although variations will persist across countries. Among oil-exporting nations, anticipated reductions in fiscal surpluses within the GCC countries are expected to be balanced by narrower deficits in others. In the GCC, fiscal measures, especially in Kuwait, are likely to support economic activity despite falling oil revenues.

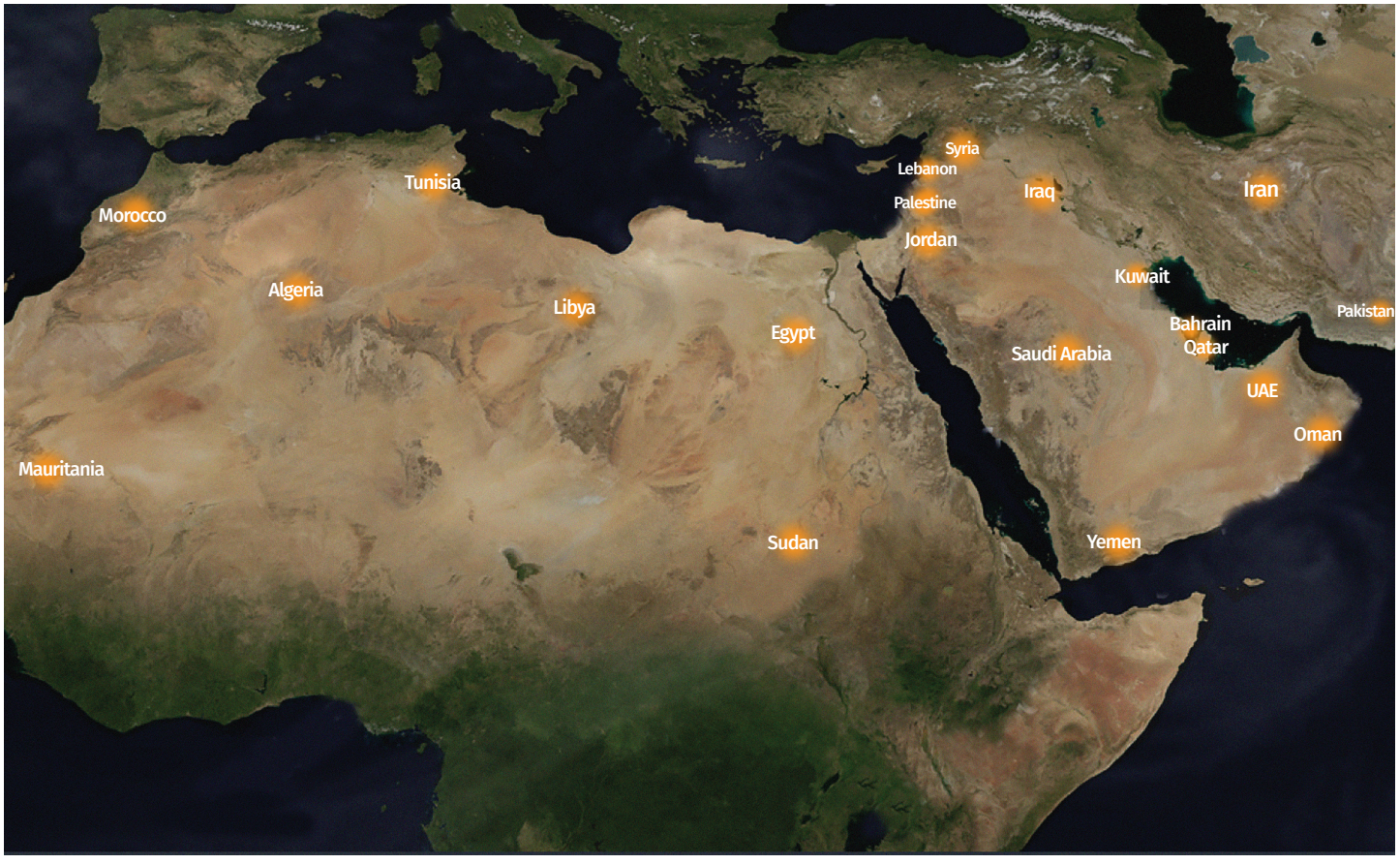
Libya's fiscal outlook is expected to strengthen alongside a recovery in oil output. While growth in Iran is expected to slow to 2.7% in the 2025/26 fiscal year and further to 2.2% in



Al Ula, Saudi Arabia

the subsequent year. This moderation is primarily due to weakening external demand for oil particularly from China and a deceleration in investment growth unrelated to the oil sector. Iraq's fiscal stance is anticipated to loosen, aiding economic recovery but weakening its fiscal balance. By 2026, rising revenues from expanding oil production are expected to enhance fiscal positions in oil-exporting countries. Meanwhile, oil-importing nations are projected to see widening fiscal deficits in 2025 increasing financing risks. In Egypt, interest payments will likely remain high.

According to the IMF, fiscal pressures will pose a notable challenge for several MENA economies, particularly those burdened with elevated public debt levels. The IMF has stressed the need for fiscal consolidation and disciplined public expenditure to maintain long-term financial stability.





Citywalk Jeddah Seasons

Countries such as Algeria, Jordan, Morocco, Egypt and Tunisia, which are contending with significant debt, are expected to persist with austerity measures and structural reforms aimed at enhancing fiscal health and narrowing budget deficits. As a result of these efforts, Tunisia's public debt is projected to fall from 90% of GDP in 2024 to 87% by the close of 2025.

On the other hand, geopolitical tensions have consistently contributed to economic uncertainty in the MENA region, which is expected to persist in 2025. Ongoing conflicts and political instability in parts of the region could undermine the broader economic outlook. Conflicts in Yemen, political unrest in Lebanon and continued tensions in Iraq and Syria are likely to dampen investor confidence and economic momentum in these areas. If left unresolved, these issues could lower regional GDP growth by as much as 0.5 percentage points.

The economic forecast remains especially fragile for countries such as Lebanon, Syria, Yemen and occupied territories including West Bank & Gaza due to persistent security and political instability. In Yemen, for instance, ongoing security threats, stalled peace negotiations and heightened domestic tensions are projected to constrain economic growth to just 1.5% in 2025, following two consecutive years of contraction, according to the World Bank.

Encouragingly, the World Bank projects per capita income growth in the MENA region to reach 2% in 2025 and 2.7% in 2026, significantly above the pre-pandemic decade average of 1.2%. For oil-importing countries, a projected 2.5% average increase during 2025-26 signals gradual progress in narrowing the income gap with advanced economies. However, poverty levels are expected to remain high in these nations, largely due to persistent inflation, particularly in food prices.

Looking ahead, sustained economic reforms and continued international support will be essential to securing a stable recovery across the region. Structural changes focused on improving the business environment, strengthening governance and supporting private-sector growth are expected to drive economic momentum in 2025.

Middle East and North Africa forecast summary

(Real GDP growth at market prices in percent, unless indicated otherwise)

	2022	2023	2024e	2025f	2026f	Percentage-point differences from June 2024 projections 2024e	2025f	2026f
EMDE MNA, GDP1	**5.4**	**1.7**	**1.8**	**3.4**	**4.1**	**-1.0**	**-0.8**	**0.5**
GDP per capita (U.S. dollars)	3.6	-0.2	0.2	2.0	2.7	-1.0	-0.7	0.4
(Average including countries that report expenditure components in national accounts)[2]								
EMDE MNA, GDP[2]	5.5	1.6	1.8	3.4	4.1	-1.0	-0.8	0.5
PPP GDP	5.3	2.0	2.0	3.4	4.0	-0.9	-0.8	0.4
Private consumption	4.9	4.3	4.1	3.7	3.7	0.9	0.5	0.5
Public consumption	4.8	3.3	2.2	3.1	2.7	-0.7	-0.7	-0.2
Fixed investment	8.1	3.2	4.1	4.5	5.0	-0.3	0.4	0.8
Exports, GNFS	12.5	1.1	0.3	5.1	5.2	-3.2	-1.6	0.0
Imports, GNFS	10.0	6.5	6.0	5.2	4.9	0.5	-0.1	-0.2
Net exports, contribution to growth	2.0	-1.7	-2.0	0.3	0.5	-1.6	-0.8	0.0
Memo items: GDP								
Oil exporters[3]	5.8	1.4	1.7	3.3	4.1	-1.1	-0.9	0.6
GCC countries[4]	7.1	0.4	1.6	3.3	4.6	-1.2	-1.4	1.1
Non-GCC oil exporters[5]	3.1	3.4	1.9	3.4	3.0	-0.8	0.0	-0.5
Oil importers[6]	4.0	2.7	2.2	3.7	4.0	-0.7	-0.3	0.0

Source: World Bank.
Note: e = estimate; f = forecast; EMDE = emerging market and developing economy; GCC = Gulf Cooperation Council; GNFS = goods and non-factor services; MNA = Middle East and North Africa; PPP = purchasing power parity. World Bank forecasts are frequently updated based on new information and changing (global) circumstances. Consequently, projections presented here may differ from those contained in other Bank documents, even if basic assessments of countries' prospects do not differ at any given moment in time.

1. GDP and expenditure components are measured in average 2010-19 prices and market exchange rates. Excludes Lebanon, the Syrian Arab Republic, and the Republic of Yemen as a result of the high degree of uncertainty.
2. Aggregate includes all economies in notes 3 and 6 except Jordan, for which data limitations prevent the forecasting of GDP components.
3. Algeria, Bahrain, the Islamic Republic of Iran, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.
4. Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.
5. Algeria, the Islamic Republic of Iran, Iraq, and Libya.
6. Djibouti, the Arab Republic of Egypt, Jordan, Morocco, Tunisia, and West Bank and Gaza.

International assistance will also be pivotal, particularly in helping countries manage fiscal pressures and implement vital reforms. For instance, in 2024 the IMF extended $3.5 billion in financial support to nations such as Tunisia and Lebanon, which are anticipated to receive further aid in 2025.

To foster inclusive and lasting growth, the MENA economies must continue efforts to diversify, invest in education and workforce development and stimulate private-sector participation. Governments will also need to introduce targeted policies to address inflation, enhance fiscal stability and reduce the impact of geopolitical volatility. With the right strategies and support, the region stands poised to achieve inclusive and resilient economic recovery in 2025. As the global economy works to recover from recent disruptions, the MENA region's ability to address its unique challenges and harness emerging opportunities will play a critical role in shaping its economic future.



Doha Quest, Qatar

Middle East and North Africa economy forecasts

(Real GDP growth at market prices in percent, unless indicated otherwise)

						Percentage-point differences from June 2024 projections		
	2022	2023	2024e	2025f	2026f	2024e	2025f	2026f
Calendar year basis								
Algeria	3.6	4.1	3.1	3.4	3.3	0.2	-0.3	0.1
Bahrain	6.0	3.0	3.5	3.3	3.3	0.0	0.0	-0.1
Djibouti	3.7	6.7	5.9	5.3	4.9	0.8	0.2	-0.3
Iraq [1]	7.6	-2.9	-0.8	3.5	3.0	-0.5	-0.3	-2.3
Jordan	2.6	2.7	2.4	2.6	2.6	-0.1	0.0	0.0
Kuwait	6.3	-3.6	-1.0	1.7	2.1	-3.8	-1.4	-0.6
Lebanon [2]	-0.6	-0.8	-5.7	..	..	-6.2	..	..
Libya	-8.3	10.2	-2.7	9.6	8.4	-7.5	4.3	2.6
Morocco	1.5	3.4	2.9	3.9	3.4	0.5	0.2	0.1
Oman	9.6	1.3	0.7	2.4	2.8	-0.8	-0.4	-0.4
Qatar	4.2	1.2	2.0	2.7	5.5	-0.1	-0.5	0.8
Saudi Arabia	7.5	-0.8	1.1	3.4	5.4	-1.4	-2.5	2.2
Syrian Arab Republic [2 3]	0.7	-1.2	-1.5	-1.0	..	0.0	..	..
Tunisia	2.7	0.0	1.2	2.2	2.3	-1.2	-0.2	0.1
United Arab Emirates	7.9	3.2	3.3	4.0	4.1	-0.6	-0.1	0.1
West Bank and Gaza	4.1	-5.4	-25.6	4.7	16.5	-19.1	-0.8	12.3
Yemen, Rep. [2]	1.5	-2.0	-1.0	1.5	..	0.0	0.0	..
Fiscal year basis [4]	2022/23	2023/24	2024/25e	2025/26f	2026/27f	2024/25e	2025/26f	2026/27f
Iran, Islamic Rep.	3.8	5.0	3.0	2.7	2.2	-0.2	0.0	-0.2
	2021/22	2022/23	2023/24e	2024/25f	2025/26f	2023/24e	2024/25f	2025/26f
Egypt, Arab Rep.	6.6	3.8	2.4	3.5	4.2	-0.4	-0.7	-0.4

Source: World Bank.

Note: e = estimate; f = forecast. World Bank forecasts are frequently updated based on new information and changing (global) circumstances. Consequently, projections presented here may differ from those contained in other Bank documents, even if basic assessments of economies' prospects do not significantly differ at any given moment in time.

1. Data are reported on a factor cost basis.
2. Forecasts for Lebanon (beyond 2024), the Syrian Arab Republic (beyond 2025), and the Republic of Yemen (beyond 2025) are excluded because of a high degree of uncertainty.
3. Forecast for 2025 was not included in June 2024 Global Economic Prospects, and therefore, the difference from June 2024 projection is not computed.
4. The fiscal year runs from March 21 to March 20 in the Islamic Republic of Iran, and from July 1 to June 30 in the Arab Republic of Egypt.

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Country Reports





Bird-eye-view of Four Seasons Hotel, Bahrain



KINGDOM OF BAHRAIN

While hydrocarbons remain key, Bahrain's strategic location, business-friendly environment, a growing population, high literacy rates and investments in education and healthcare strengthen its human capital, supporting industrial and technological expansion.

Geography & Historical Background

Bahrain is an island nation in the Arabian Gulf, consisting of 50 natural and 33 artificial islands. Covering approximately 780 square kilometres (sq km), it is the third smallest country in Asia. Strategically located between Saudi Arabia and Qatar, Bahrain serves as a crucial maritime and trade hub in the region. The King Fahd Causeway connects Bahrain to Saudi Arabia, further enhancing its geopolitical significance.

Historically, Bahrain was home to the ancient Dilmun civilisation, a major trading centre dating back over 4,000 years. The island later became part of various empires, including the Persian, Portuguese and Ottoman Empires. In the 19th century, Bahrain became a British protectorate before gaining independence in 1971. Today, it is ruled by the Al Khalifa family.

As one of the first Gulf states to diversify beyond oil, Bahrain has developed strong banking, tourism and logistics sectors. Its liberal business environment and strategic position make it a key player in Middle Eastern trade, finance and international diplomacy

Population

According to the World Population Review, Bahrain's population stood at 1.62 million in 2024, up from 1.57 million in 2023, and is projected to reach 1.8 million by 2030. The country's median age is 32.9 years currently. Notably, Bahrain is a very densely populated country, ranking seventh globally for its population density per sq km.

Employment grew by approximately 1.4% in 2023 compared to 2022 and is expected to maintain a similar growth rate in 2024, according to the International Labour Organization (ILO). Job growth among women continues to outpace that of men, potentially driven by the Riyadat programme, which supports Bahraini women entrepreneurs with access to financing. However, the overall unemployment rate is projected to decline to around 1.1% in 2024, with female unemployment estimated at 3.7% and male unemployment at 0.4%. However, young women aged 15-24 continue to face greater employment challenges than their male counterparts, with unemployment rates projected at 12.3% for young women versus 2.6% for young men.



Athar the symbol of deep respect for women, Bahrain



Bahrain at a Glance

Official Name	Kingdom of Bahrain
Land Area	780 sq km
Capital	Manama
Government	Constitutional Monarchy
Emir	His Majesty King Hamad Bin Isa Al Khalifa
Crown Prince & Prime Minister	His Royal Highness Prince Salman bin Hamad Al Khalifa
Population (2024)	1.6 million
Population Density	2,114.5 per sq km
Population Growth	1.6%
Nationality Split	Approximately 46.1% Bahrainis and 53.9% expatriates
GDP (2023)	$46.1 Billion
GDP Per Capita (2023)	$29,219
GDP Growth (2023)	3.0%
Inflation – Consumer Prices (2023)	0.1%
Industries	Oil & gas, aluminium, financial services, manufacturing, tourism, information and communications technology (ICT)
National Day	December 16
Independence Day	August 15, 1971
Official Language	Arabic
Dominant Religion	Islam
Currency	Bahraini Dinar
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+973

Sources: Government of Bahrain Data, The CIA World Factbook, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	95,600	48,600	47,000
5 – 9	104,800	53,300	51,500
10 – 14	100,600	51,500	49,100
15 – 19	88,100	45,400	42,700
20 – 24	106,800	66,400	40,400
25 – 29	145,600	91,000	54,600
30 – 34	194,200	130,200	64,000
35 – 39	212,500	151,800	60,700
40 – 44	172,400	120,000	52,400
45 – 49	125,200	83,100	42,100
50 – 54	89,500	58,700	30,800
55 – 59	64,700	39,300	25,400
60 – 64	45,300	25,300	20,000
65 – 69	29,100	15,800	13,300
70 – 74	14,900	7,800	7,100
75 – 79	8,384	4,279	4,105
80+	9,614	4,730	4,884

Source: World Population Review

Population per City Snapshot (2024)



Source: World Population Review

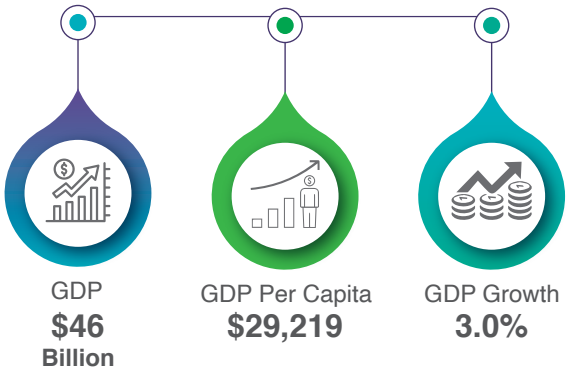
Economy

According to the World Bank's Spring 2024 Gulf Economic Update Bahrain's economic outlook is closely tied to oil market trends and the pace of structural reforms. Growth is projected to rise to 3.5% in 2024, driven primarily by increased oil production, while the non-oil sector remains the key contributor to expansion. The hydrocarbon sector is expected to grow by 1.3% in 2024, trailing the nearly 4% growth anticipated in non-hydrocarbon sectors. In fact, Bahrain boasts one of the most diversified economies in the GCC, driven by construction, manufacturing, a strong services sector and a rebound in tourism. Additionally, the government's four-year plan (2023-26) focuses on enhancing living standards, infrastructure development and accelerating digital transformation, thereby fuelling non-oil sector growth.

Overall, Bahrain's investor-friendly policies and progressive reforms have positioned it as a key destination for global investment. A growing population, high literacy rates and significant investments in education and healthcare contribute to a skilled workforce. Moreover, Bahrain's development agenda prioritises infrastructure advancements, digital transformation and economic diversification, reinforcing its commitment to long-term sustainability and competitiveness in the regional and global markets.

Notably, Bahrain has maintained its leading position among Arab countries as the "freest economy" in the Arab World, according to the Economic Freedom of the World 2024 report published by the Fraser Institute. The country ranked 34th globally among 165 countries and topped the GCC in three out of five main areas including Regulation, Sound Money and Size of Government.

State of Economy Highlights (in 2023)



Total Exports

$40 BN

Total Imports

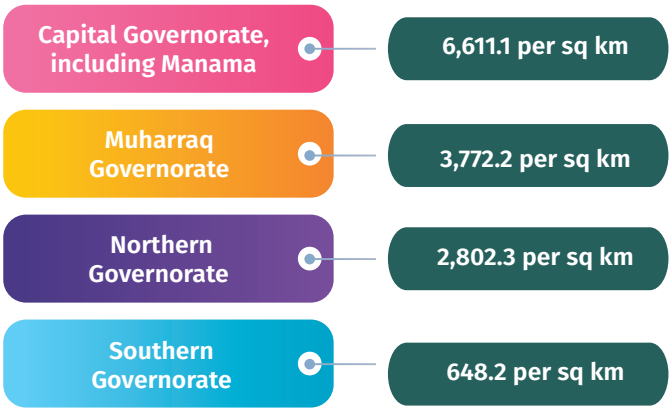
$32 BN

Sources: World Bank & CIA The World Factbook

First country in the GCC to adopt the Domestic Minimum Top-up Tax (DMTT) in September 2024. Effective January 1, 2025, this tax imposes a minimum 15% levy on multinational enterprises with global revenues exceeding $828 million.

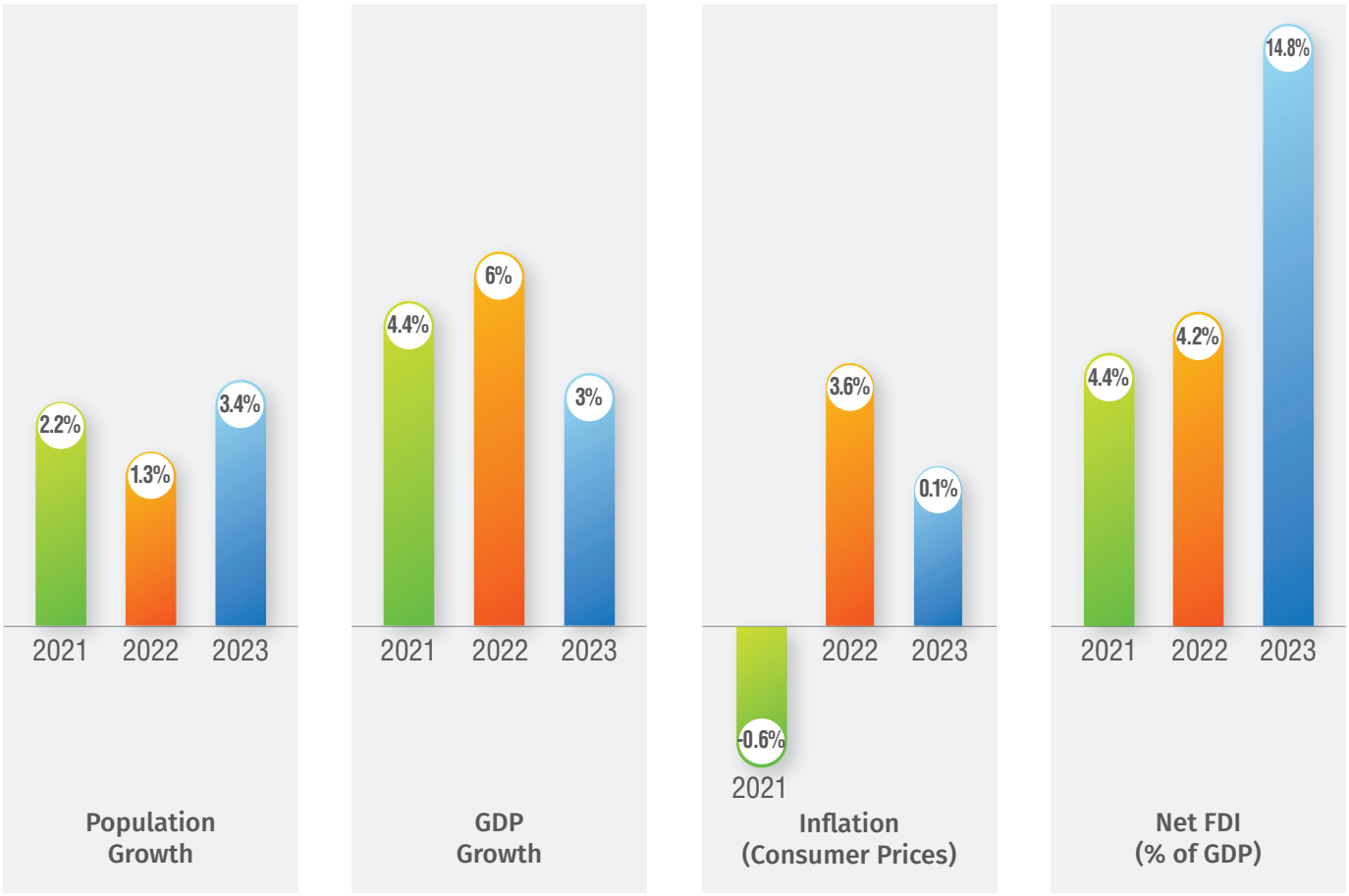
VAT Rate Increase to 10% in 2022

Population Density per Governorate (2023)



Source: Government of Bahrain

Key Macroeconomic Highlights



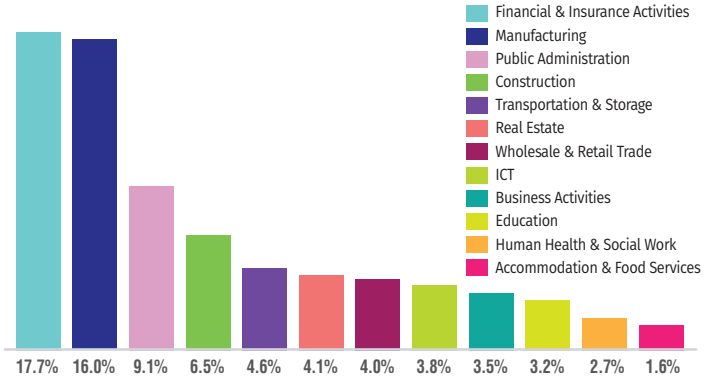
Source: World Bank

GDP Projections

Indicators	2024 (Estimated)	2025 (Projected)	2026 (Forecasted)
Real GDP Growth	3.5%	3.3%	3.3%
Growth in Exports	-6.0%	4.2%	4.2%
Growth in Imports	2.4%	3.1%	2.7%
CPI Inflation (Average)	1.3%	1.5%	2.0%

Source: World Bank

Non-Oil Contribution to Real GDP – Q3 2024



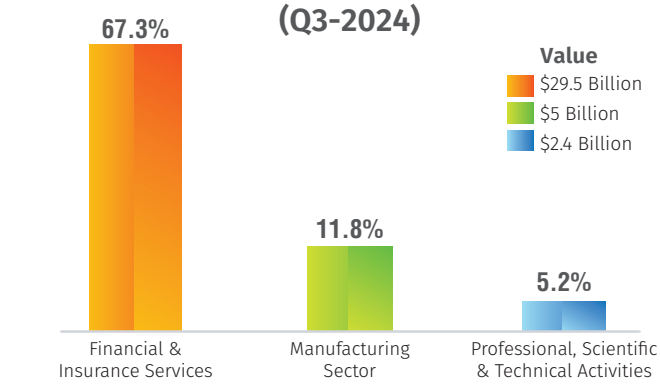
Source: Information & eGovernment Authority

Investment

The total value of foreign direct investment (FDI) into the country rose by 3.5% year-on-year in Q3 2024, reaching $43.8 billion, up from $42.2 billion during the corresponding period in 2023, indicated data from Bahrain's Information and eGovernment Authority in collaboration with the Central Bank of Bahrain.

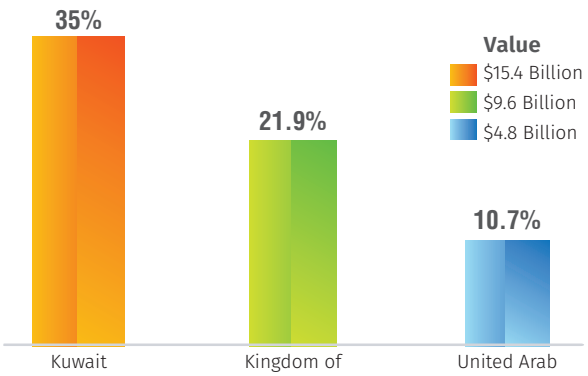
Meanwhile, in 2023 Bahrain reached a milestone by securing a $6.8 billion in FDI inflows, recording a 148% increase versus the figure in 2022, stated the latest World Investment Report by the United Nations Conference of Trade and Development (UNCTAD).

Share of Inward FDI Stock by Economic Activities (Q3-2024)



Source: Information & eGovernment Authority, Bahrain

FDI Stock by Source Countries (Q3-2024)



Bahrain Tourism Sector

Bahrain is already renowned for its rich hospitality heritage, which is being further enhanced with a diverse range of cultural, heritage, adventure and coastal attractions. Through strategic diversification of attractions, the country has reinforced its reputation as a premier entertainment and weekend destination. In addition, Manama's recognition as the Gulf Tourism Capital for 2024 further underscores Bahrain's growing significance in the region's tourism sector.

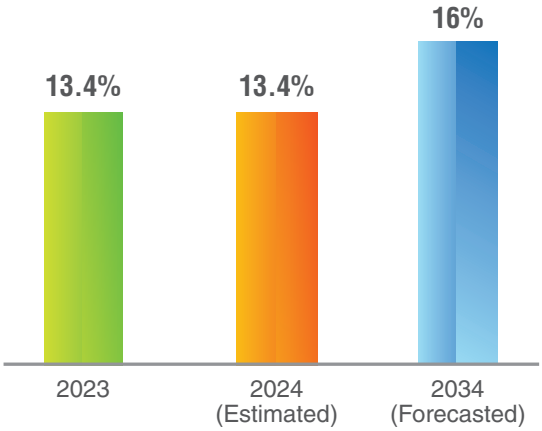
As a result, even though it faces intensifying competition from its well-established neighbours such as the UAE and Saudi Arabia's emerging market, Bahrain manages to stand out as a tourism destination.

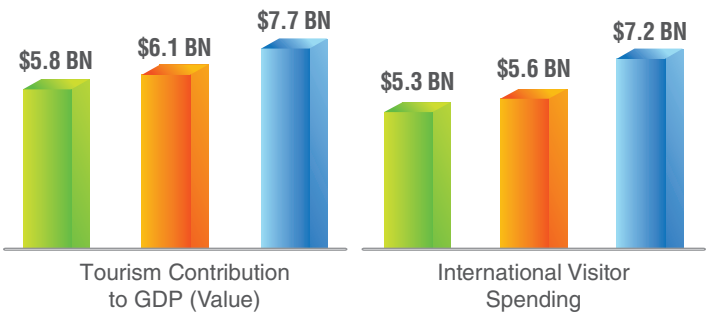
In response to the economic impact of COVID-19, Bahrain introduced its Economic Recovery Plan in October 2021, which included six sector strategies, one of which focused on tourism. Announced in November 2021, the Tourism Strategy 2022-26 was created as a comprehensive roadmap for the sector's growth, with diversification at its core.



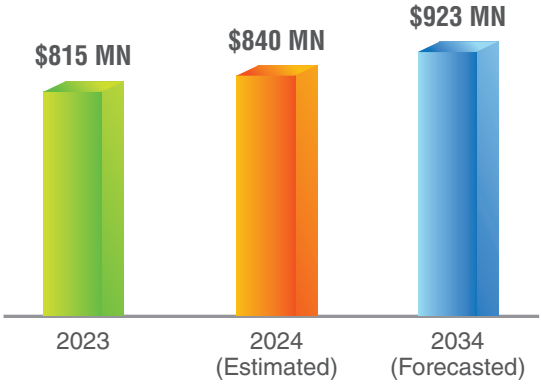
Source: Government of Bahrain

Tourism Contribution to GDP (%)



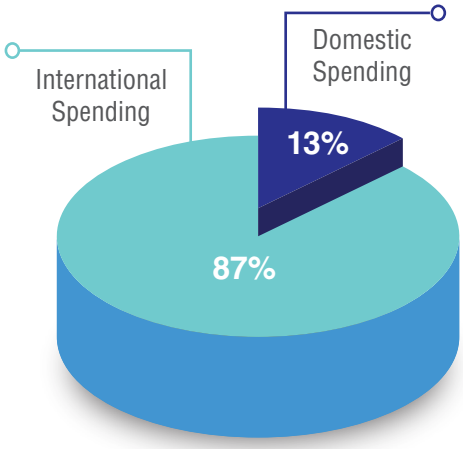


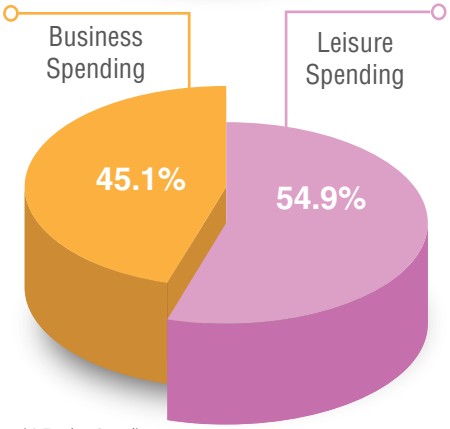
Domestic Visitor Spending



Sources: World Travel & Tourism Council

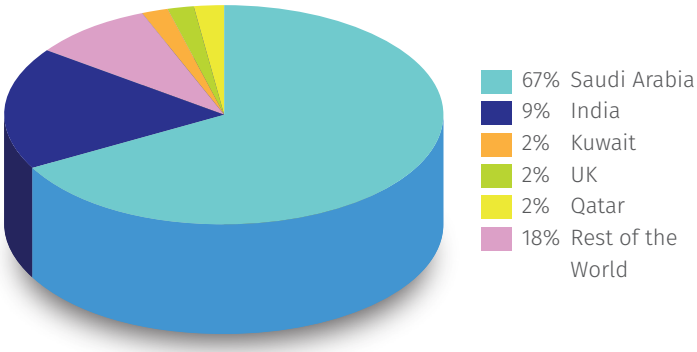
Percentage Share of Total Spending (2023)





Sources: World Travel & Tourism Council

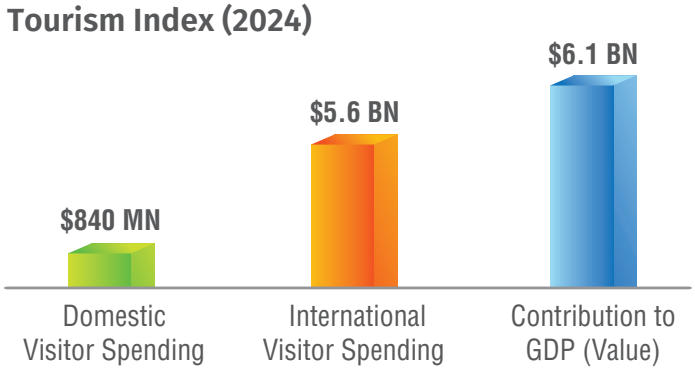
Inbound Arrivals (2023)

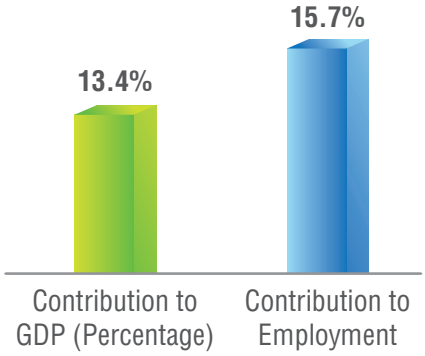


Sources: Oxford Economics, UN Tourism


Isa Cultural Centre & Plaza, Manama

Tourism Index (2024)





Ranking in the World Travel and Tourism Development Index

58

Sources: World Travel & Tourism Council, WEF Travel and Tourism Development Index


Sheikh Isa bin Salman Causeway Bridge, Manama City, Bahrain

Bahrain's Tourism Strategy 2022-26 at a Glance

14.1 Million Visitors by 2026

11.4% Contribution to GDP

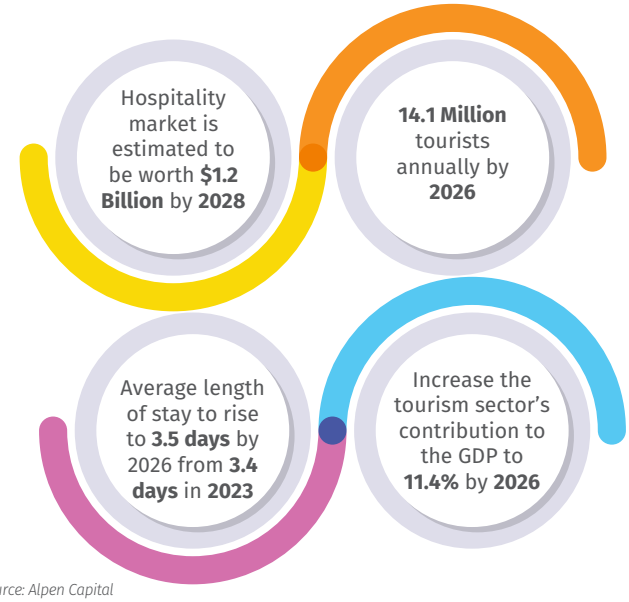
$198.4 Average Daily Visitor Spend

3.5 days Average Length of Stay

Marina at Amwaj Islands, Bahrain

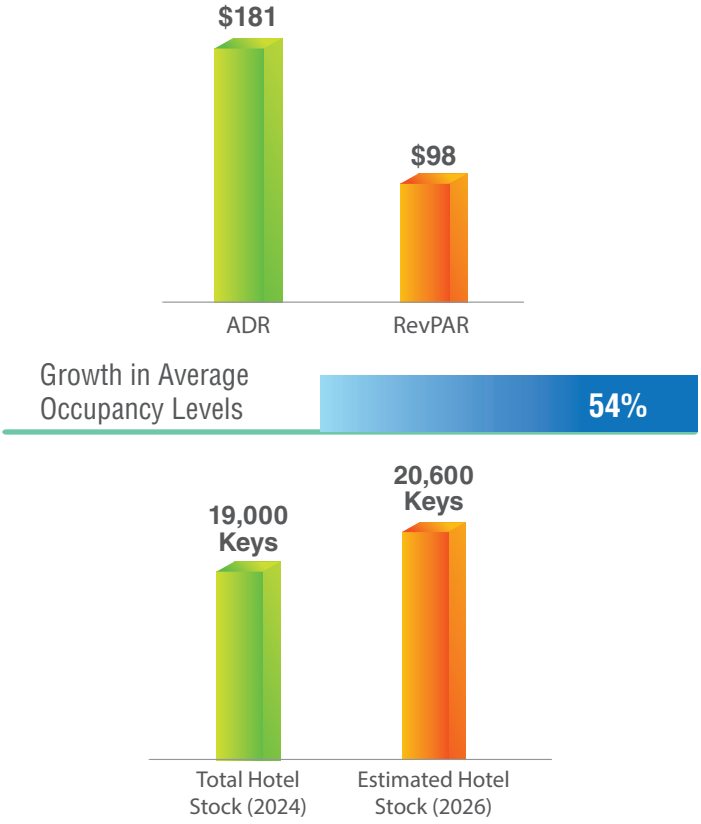
Aligned with the Bahrain Economic Vision 2030, the Economic Recovery Plan and Tourism Strategy, several major tourism projects have been launched. According to the Bahrain Economic Quarterly Report Q3-2024, during 2024, four new five-star hotels were inaugurated including Conrad Residence, Onyx Arjaan by Rotana and the newly renovated Sheraton Bahrain Hotel. In addition, the Hawar Resort by Mantis was also opened as the first project under the master plan for the Hawar Islands.

Bahrain Tourism & Hospitality Goals at a Glance



Source: Alpen Capital

Bahrain Hotel Sector Performance (Jan-May 2024)



Source: Knight Frank

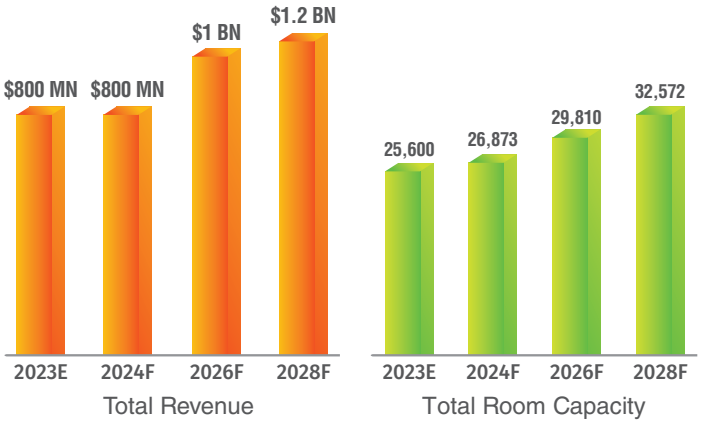


Qal'at al-Bahrain Archaeological site, Manama

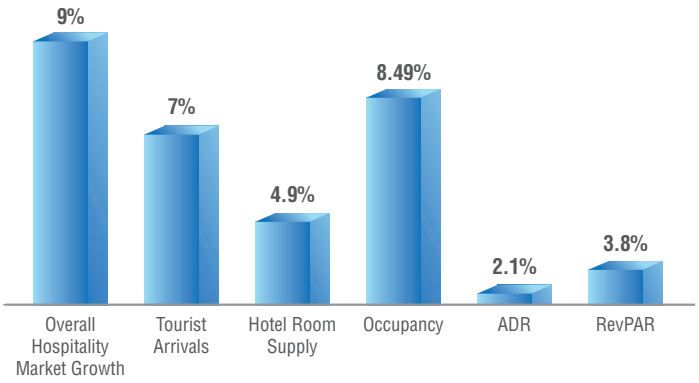
Notably, Hawar Island has been a key focus of Bahrain's tourism development plan, with a strong emphasis on eco-tourism to ensure environmental preservation as a designated wildlife sanctuary. The Mantis Bahrain Hawar Island Hotel and Resort, a collaboration between Accor and Edamah, embodies this commitment. The 102-key property features 24 overwater villas, a spa, a wellness centre and a Bear Grylls Survival Academy, all designed with sustainability in mind. The resort, set to open in early 2025, integrates eco-friendly practices such as recycling and water and energy conservation.

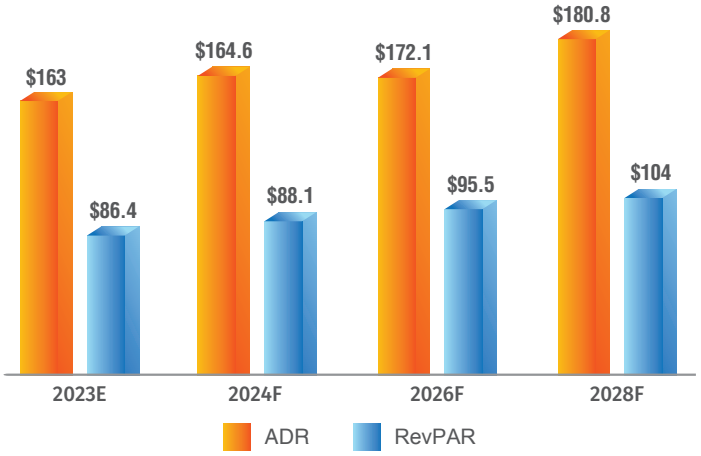
Overall, with the development of new hotels, improved transport infrastructure and strong government support, Bahrain is well-positioned to strengthen its role in the Gulf tourism market. Its compact yet diverse array of attractions, coupled with a strategic focus on sector diversification, provides the country with a competitive advantage in drawing tourists, business executives and conference attendees in the years ahead.

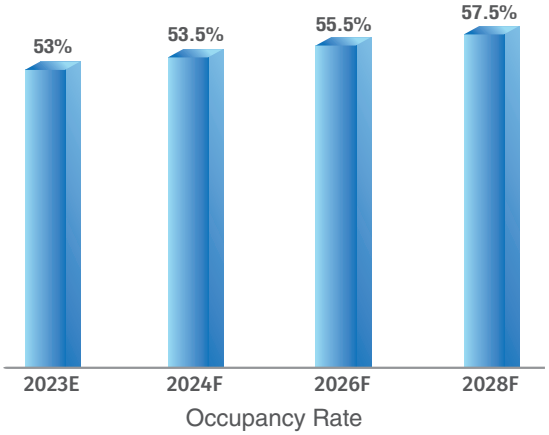
Bahrain Hospitality Market Forecast



Bahrain Hospitality Market Growth (2023-28)







Source: Alpen Capital

E: Estimated
F: Forcasted





Bahrain Skyline at night

Launched in 2008, Bahrain's Economic Vision 2030 outlines a comprehensive plan to develop the nation's economy with the primary goal of improving living standards for all citizens. The Vision is built upon three core principles including sustainability, fairness and competitiveness.

• **Sustainability** focuses on ensuring that future generations can enjoy improved living standards by diversifying the economy beyond oil dependence. This involves investing in human capital, particularly in education and training in applied sciences, and fostering innovation to support a thriving private sector.

• **Fairness** aims to provide equal opportunities for all citizens, enhancing social justice and reducing disparities. The Vision emphasises the importance of a transparent and accountable government that upholds the rule of law and ensures that all citizens benefit from economic growth.

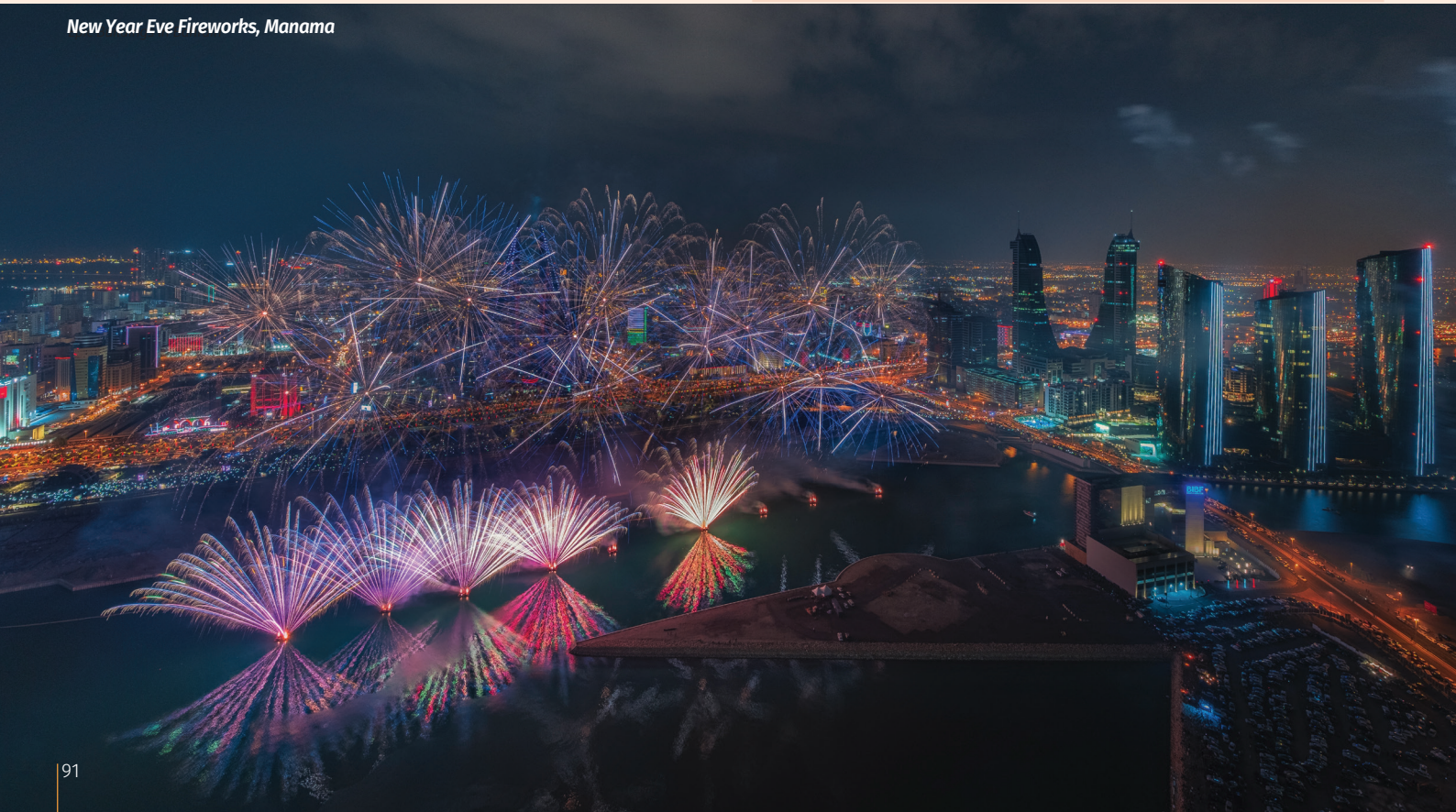
• **Competitiveness** seeks to position Bahrain as a dynamic and productive economy by creating a business-friendly environment that attracts both local and foreign investments. This includes developing high-quality public services, advanced infrastructure and an appealing living environment to motivate productivity and growth.

Key Goals at a Glance

Double the real disposable income of Bahraini households by 2030.

Produce 280 megawatts of electricity from renewables by 2025, increasing to 710 megawatts by 2035.

New Year Eve Fireworks, Manama



Bahrain Leisure & Entertainment Industry

The leisure, entertainment and amusement landscape in Bahrain is witnessing significant growth, driven by strategic investments and a robust tourism sector. Some key developments include The Lost Paradise of Dilmun Water Park and Marassi Aquarium & Underwater Zoo offering diverse attractions for families and tourists. The Al Dana Amphitheatre has also become a prominent venue for international events, enhancing Bahrain's cultural offerings. In addition, the opening of luxury retail spaces like Marassi Galleria indicates a shift towards high-end consumer experiences. These developments, coupled with Bahrain's strategic location and favourable business environment, position the Kingdom as an upcoming hub for leisure & entertainment in the region.

Key Leisure & Entertainment Operators (MENALAC Members in bold)

- Adventure hub
- Adhari Park
- Al Areen Wildlife Park
- Bahrain International Circuit
- Escape Code Entertainment
- Fun & Fun Family Entertainment Co. W.L.L
- Funland Centre - Bowling & Ice Skating
- Funscape World
- Gravity Indoor Skydiving
- **Hawa, Muharraq**
- Jumpup Trampoline Park
- **Jumpoline Trampoline Park**
- Kids Kingdom
- Kids Palace Atrium Mall
- **Magic Island, Muharraq**
- **Magic Island, Seef District (Manama)**
- **Magic Planet City Centre Bahrain**
- Marassi Aquarium & Underwater Zoo
- Pirate Land
- The Blast
- The Great Escape Challenge
- The Lagoon Park
- **VOX Cinemas**
- **Yabeela Bahrain**



Bahrain Fort a UNESCO World Heritage Site



Al Areen Wildlife Park



Adhari Park



The Lost Paradise of Dilmun Water Park



Marassi Aquarium & Underwater Zoo



The Lagoon Park, Amwaj Islands



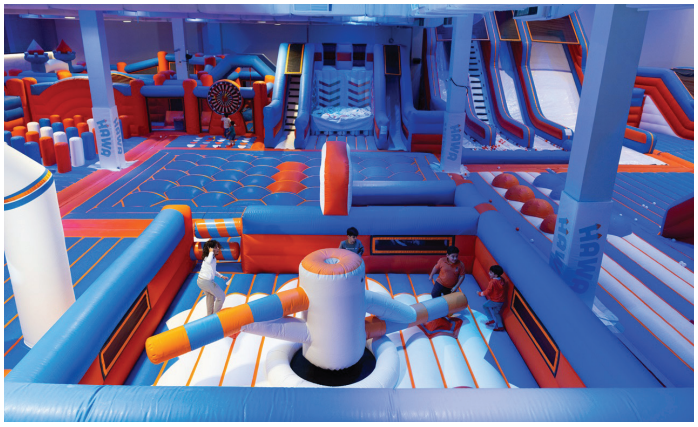
Atlantis the Immersive Odessy



Magic Planet City Centre Bahrain



Yabeela



Hawa, Muharraq



Xtreme Bowling Bahrain



Jumpup Trampoline Park



Magic Island



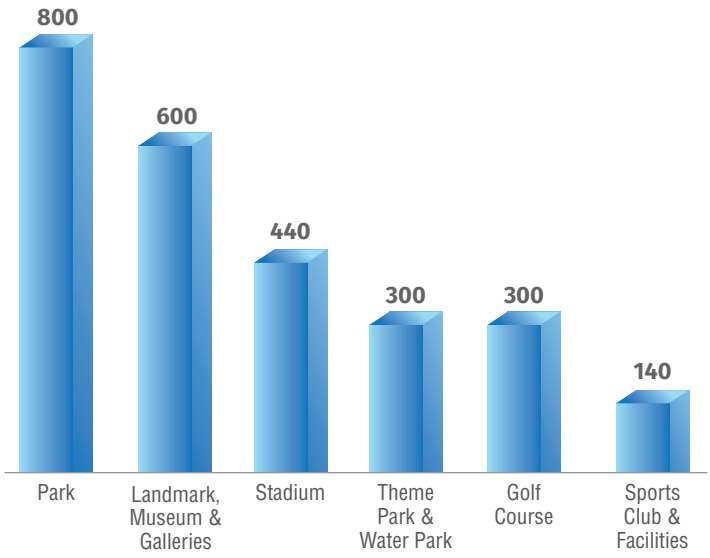
Bahrain International Circuit Karting (BIC) & Gravity Indoor Skydiving

Upcoming Mega Projects at a Glance

Bahrain's tourism, hospitality, leisure & entertainment and retail sectors are pivotal to its economic diversification strategy. With a growing number of tourists arriving from outside the region, drawn by the country's rich heritage and events such as the Bahrain Grand Prix, the government is focusing on expanding food service, retail and leisure offerings to attract profitable investments. Post-pandemic, consumer expectations have evolved, leading to the development of trendy, affordable hotels connected to shopping malls. The tourism sector significantly contributes to employment and GDP, with ongoing government commitment to its growth. Bahrain's strategic initiatives aim to position it as a gateway to the Gulf, enhancing infrastructure and promoting tourism to boost its economy.

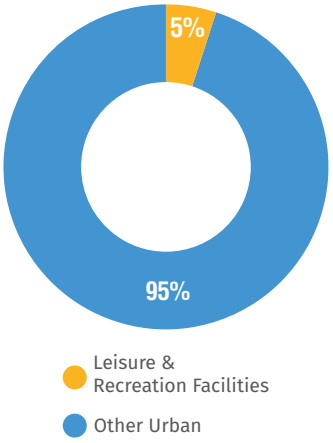
Bahrain's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

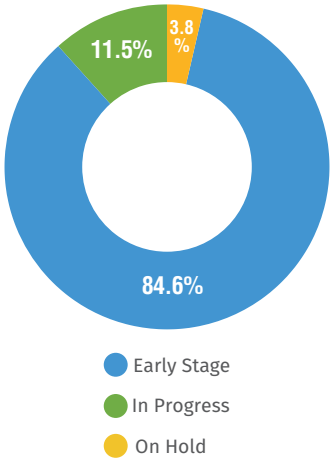


Source: BNC

Contribution of Leisure & Recreation Industry to Bahrain's Urban Sector



Stage-wise Distribution



Durrat Al Bahrain – Phase 4 (Jawharat Al Murjan)

Value: USD 7 billion
Stage: Under Construction
Developers: Bahrain Mumtalakat Holding Company, Durrat Khaleej Al Bahrain, Kuwait Finance House Bahrain, Tameer
Description: The Durrat Al Bahrain resort construction project was completed through a joint venture between Great Lakes and AA Nass Contracting. The project involved the reclamation of over 6 million square metres (sqm) of land for the creation of the resort, which consists of 13 islands, over 2,000 villas and 2,000 apartments, luxury hotels, restaurants, promenades, shopping centres, marina, spas, sports facilities and an 18-hole golf course. In the 4th phase, the development offers four unique villa designs, each featuring modern glass façades that create a fresh, open atmosphere within the homes.
Completion: NA



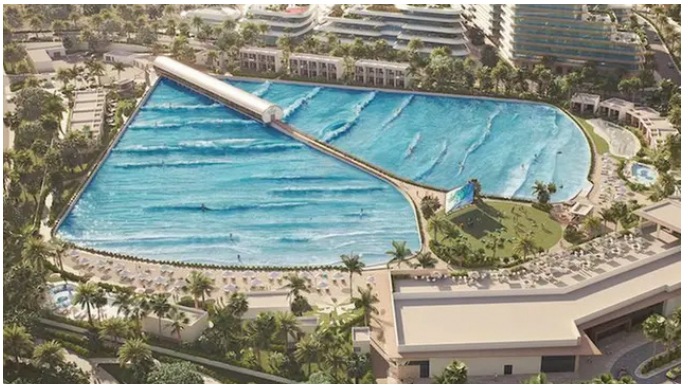
Golf Course - Al Areen Development

Value: USD 25 million
Stage: Design
Developers: Al Areen Holding Company
Description: The project involves the construction of a state-of-the-art 18-hole golf course within the Al Areen masterplan in Bahrain. Spanning approximately 1.4 million square meters, the course will feature exquisite architectural design infused with luxury, set amidst stunning natural surroundings. It promises a remarkable playing experience, catering to golfers of all skill levels.
Completion: Q4 2027



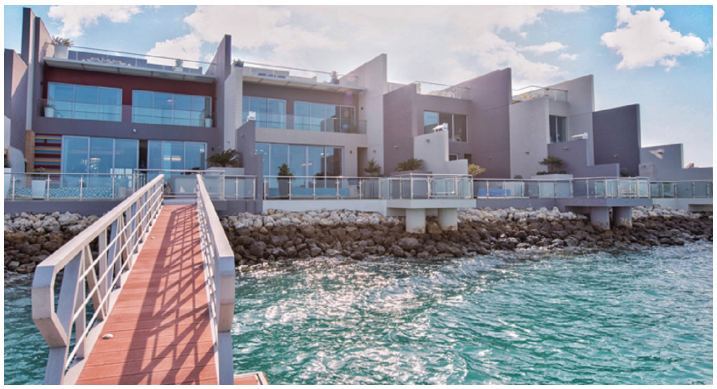
Bahrain Surf Park - Club Hawaii Experience

Value: USD 50 million
Stage: Design
Developers: Gulf Finance House, Bahrain Real Estate Investment, Wavegarden
Description: The surf park will be part of the Bilaj Al Jazayer development on Bahrain's southwest coast, utilizing advanced Wavegarden Cove technology. This innovative system can host up to 90 surfers simultaneously and generate up to 1,000 waves per hour, accommodating all skill levels from beginners to elite athletes. Additionally, the project includes the Club Hawaii Surf Academy, which will offer comprehensive training programs designed to nurture and develop future surfers, ranging from beginners to advanced levels. The surf park will feature a variety of amenities, including food and beverage outlets, a spacious terrace, a retail store, private cabanas, event spaces, and a large entertainment area suitable for corporate or school groups.
Completion: Q4 2026



Al-Naseem Community Centre

Value: USD 20 million
Stage: Under Construction
Developers: Diyar Al Muharraq
Main Contractor: Ahmed Omer Trading & Contracting
Description: The project will offer various amenities including sports and entertainment facilities, and commercial and service offerings for the residents in the area. The center will also have indoor and outdoor play areas for children, a café, separate gyms for men and women, a versatile venue, and a padel court located on the rooftop. Additionally, the project will include four retail units and office spaces specifically designated for the management team.
Completion: Q2 2025



Areen Residences

Value: USD 2 billion
Stage: Tender
Developers: Gulf Finance House BSC, Al Areen Holding Company
Description: The project involves the construction of Areen Residences situated in the southern region of the Kingdom of Bahrain, near Al Areen Wildlife Park and Reserve. It spans 2 million sqm and will be home to 25,000 residents. The development includes residential, hospitality, leisure and retail elements organised into 16 major clusters. The project is close to Bahrain International Circuit and Al Dana Amphitheatre.
Completion: Q4 2028



Red Line (LRT) – Phase 1 – Bahrain Integrated Transit Lines

Value: USD 1 billion
Stage: Tender
Developers: Ministry of Transportation & Telecommunications, Bahrain Municipality, Ministry of Works & Housing
Description: The project involves the construction of a 13-km long Red Line (LRT), to be operated by driverless trains, as part of Phase I of the Bahrain Integrated Transit Lines. It will connect Bahrain International Airport (BAH) to Seef Mall via Airport Avenue and King Faisal Highway, Avenues Mall, Bab Al Bahrain and Bahrain City Centre Mall through nine stations.
Completion: Q4 2030



Retail Facilities & Marina (Phase 1) – Bahrain Marina

Value: USD 230 million
Stage: Under Construction
Developers: Social Insurance Organisation (SIO), Bahrain Marina Development Co.
Main Contractor: Nass Contracting Co. WLL (Nass Group)
Description: The project involves the construction of Phase 1 of the Bahrain Marina Development, comprising retail facilities and the marina, located close to the National Museum and theatre site in the capital city of Manama. Phase 1 will include leisure and entertainment areas, including waterside retail, 5,000 sqm of family entertainment centre, a 10-screen cinema, a 2,500 sqm public plaza, yacht club and a 235-berth marina.
Completion: Q3 2026



Ras Rumman Mosque, Bahrain



Saudi Arabia skyline



KINGDOM OF SAUDI ARABIA

The Kingdom of Saudi Arabia, a nation historically synonymous with vast oil reserves and its religious significance as the birthplace of Islam, has been undergoing transformative changes.

Geography

The Kingdom of Saudi Arabia (KSA), covering 2.15 million square kilometres (sq km), is the largest country in the Middle East and accounts for about 80% of the Arabian Peninsula. It ranks as the 13th-largest country globally and fifth in Asia. The Kingdom features vast interconnected deserts, with the Rub Al Khali (Empty Quarter) being the largest, spanning approximately 650,000 sq km.

Saudi Arabia shares borders with Iraq, Jordan and Kuwait to the north; Qatar and the UAE to the east; Oman and Yemen to the south. The King Fahd Causeway connects it to Bahrain off its eastern coast. Its western coastline lies along the Red Sea while its eastern region includes Al Ahsa Oasis and oil-rich Eastern Province.

Population

According to the most recent census results (conducted in 2022) released in May 2023 by the General Authority for Statistics (GaStat), Saudi Arabia's population stood at 32.2 million in 2022, up from 30.8 million the previous year. The Kingdom's population has risen by 34.8% since 2010, with similar rates of growth seen for both Saudi citizens and non-nationals.

The census results indicate that Saudi nationals accounted for 58.4% of the population – which translates to approximately 18.8 million people – while non-nationals made up the remaining 41.6% – equating to around 13.4 million people. The Kingdom's population is young, with a median age of 29 and an estimated 60% under the age of 30. Similarly, it has a gender ratio of approximately 61% male to 39% female.

Meanwhile, according to the World Population Review Saudi Arabia's population stood at 34 million in 2024 and is estimated to touch 38 million by 2031. Moreover, with improving the quality of life being a crucial pillar of Vision 2030, life expectancy in the Kingdom has risen to 78.1 years, surpassing a baseline of 77.1 years.

The Kingdom is pursuing a policy of Saudisation in many industries, whereby Saudi nationals fill a stipulated minimum proportion of jobs. By the first quarter of 2024 the unemployment rate for Saudi nationals had decreased to 7.6% from 7.8% versus the same period in 2023. The overall unemployment rate for both Saudis and non-Saudis was 3.5%, compared to 3.4% in the fourth quarter of 2023. The labour force participation rate for Saudis had increased to 51.4%, in contrast to 50.4% in the last quarter of 2023. However, the overall labour force participation rate had fallen to 66% from 67% in the previous quarter. A GaStat report also revealed that 95.5% of unemployed Saudis were willing to accept job offers in the private sector, marking a significant shift as citizens traditionally preferred public sector jobs.



Saudi Arabia at a Glance

Official Name	Kingdom of Saudi Arabia (KSA)
Land Area	2.15 million sq km
Capital	Riyadh
Government	Absolute Monarchy
Emir	King Salman Bin Abdul Aziz Al Saud
Crown Prince	Prince Mohammed Bin Salman Bin Abdul Aziz Al Saud
Population (2024)	35.3 million
Population Density	15.80 per sq km
Population Growth	2.19%
Nationality Split (KSA Census Statistics 2022)	58.4% Saudi & 41.6% non-Saudi
GDP (2023)	$1.07 trillion
GDP Per Capita (2023)	$32,094
GDP Growth (2023)	-0.8%
Inflation – Consumer Prices (2023)	2.3%
Industries	Aerospace & Defence, Agriculture & Food Processing, Chemicals, Energy, Environment Services, Financial Services, Healthcare & Life Sciences, Industrial & Manufacturing, Information and Communication Technology (ICT), Leisure & Entertainment, Mining & Metals, Oil & Gas, Pharma & Biotech, Real Estate, Retail, Tourism, Transport & Logistics
National Day	September 23
Official Language	Arabic
Dominant Religion	Islam (Sunni Majority)
Currency	Saudi Riyal (SAR)
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+966

Sources: General Authority for Statistics KSA, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	2,639,200	1,343,200	1,296,000
5 – 9	2,763,700	1,407,000	1,356,700
10 – 14	2,677,600	1,366,200	1,311,400
15 – 19	2,435,700	1,248,400	1,187,300
20 – 24	2,586,100	1,462,200	1,123,900
25 – 29	3,428,700	2,179,100	1,249,600
30 – 34	4,015,400	2,662,200	1,353,200
35 – 39	3,781,400	2,559,800	1,221,600
40 – 44	3,032,900	2,067,000	965,900
45 – 49	2,147,100	1,448,700	698,400
50 – 54	1,542,400	1,032,400	510,000
55 – 59	1,137,000	744,800	392,200
60 – 64	764,500	477,300	287,200
65 – 69	438,200	255,200	183,000
70 – 74	248,300	136,200	112,100
75 – 79	168,700	90,800	77,900
80+	147,010	70,299	76,711

Source: World Population Review

Population Snapshot per Province (2024)



Source: World Population Review

Economy

In 2023 Saudi Arabia's GDP witnessed a decline of 0.8% compared to the previous year. This was due in large part to a significant drop in the oil sector, which fell by approximately 9%, primarily due to lower prices. The non-oil sector showed considerable resilience, growing by 4.4% during the same period.

Meanwhile, according to the GaStat KSA recorded 1.3% real GDP growth in 2024 versus the previous year. Non-oil and government activities increased by 4.3% and 2.6%, respectively, while oil activities declined by 4.5%.

The International Monetary Fund (IMF) categorises Saudi Arabia as an emerging market economy, a grouping that includes countries such as China, India, Russia and Turkey. While the World Bank classifies the Kingdom as a high-income, non-OECD (Organisation for Economic Co-operation and Development) country.

Hydrocarbon-led income has traditionally accounted for most of the public revenue. However, since the launch of Saudi Vision 2030, the Kingdom's economic performance has been driven by both oil and non-oil activities in recent years, both of which have recovered as pandemic pressure faded.



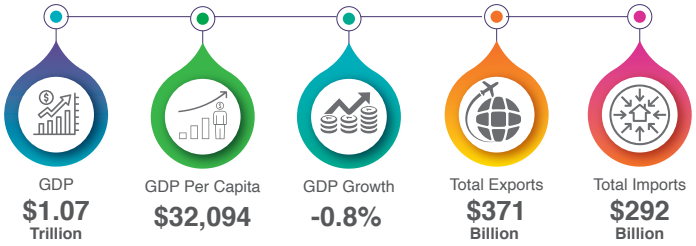
Non-Oil Sector Growth (2023)

Non-oil activities accounted for **50%** valued at **$453** billion of KSA'S GDP in **2023.**

40% of this growth fuelled by entertainment, hospitality and tourism sectors.

Source: Ministry of Economy and Planning

State of Economy Highlights (in 2023)



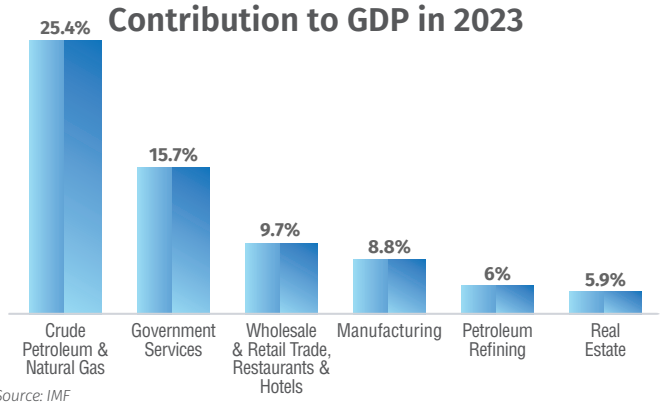
Sources: World Bank & CIA The World Factbook

Updated GDP Growth in 2024 1.3%

Projected GDP Growth in 2025 3.3%

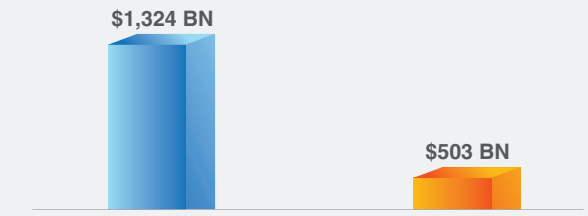
Source: IMF

Contribution to GDP in 2023



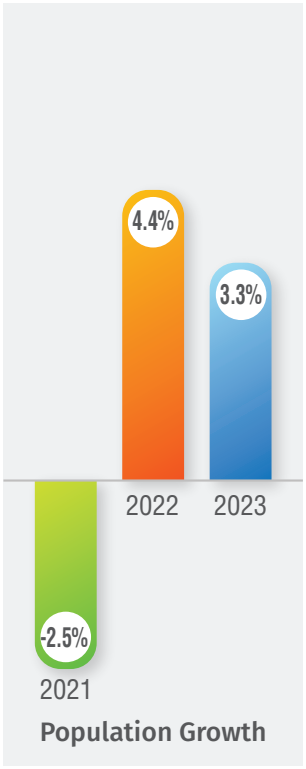
Source: IMF

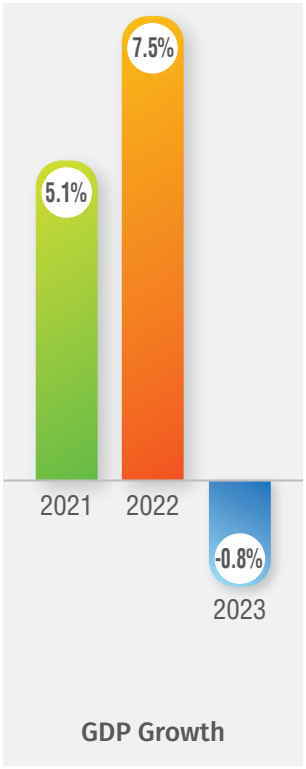
Growth in Non-Oil GDP

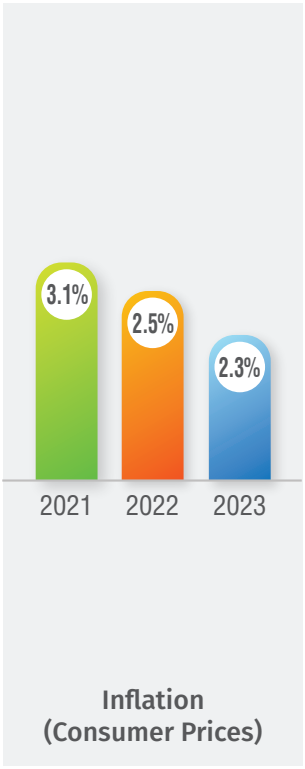


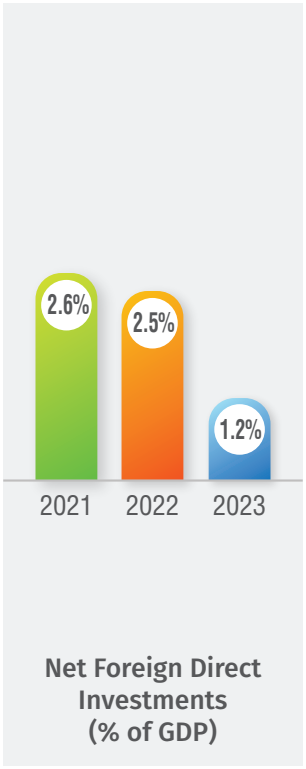
Source: Saudi Press Agency

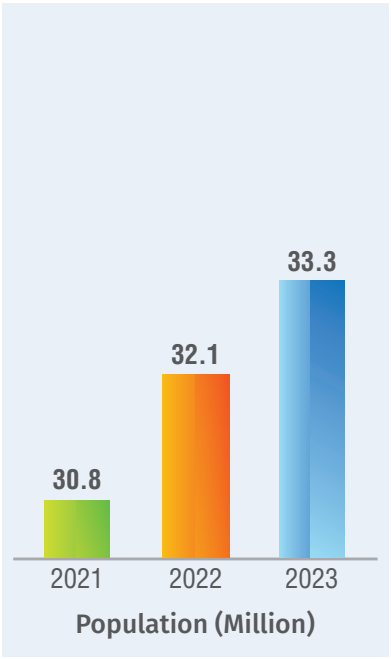
Key Macroeconomic Highlights

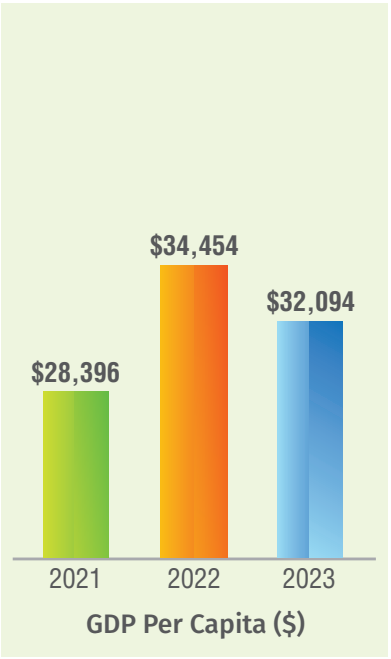


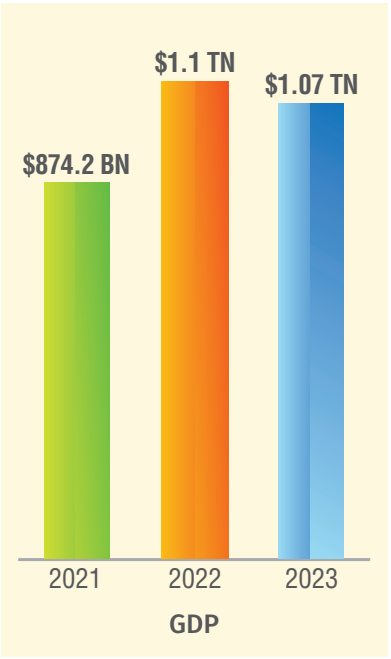












Source: World Bank



Wadi Al Disah in the Tabuk region, KSA

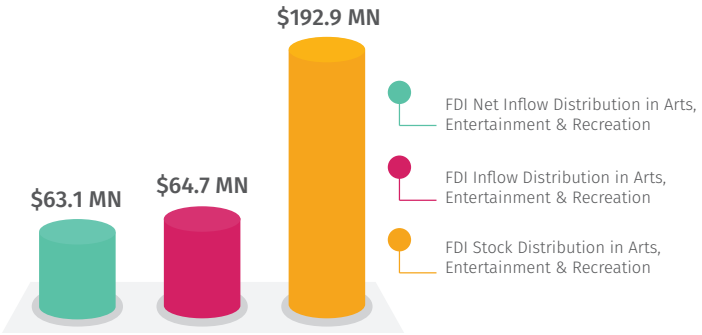
Investment

In recent years, the Kingdom has been open to foreign direct investments (FDI). In 2021 the Kingdom launched its National Investment Strategy (NIS), designed to empower investors, enhance competitiveness and strengthen the partnership between the public and private sectors, Oxford Business Group mentioned in a report.

According to the report, the NIS is expected to generate $1.1 Trillion in investment through to 2030. It seeks to increase the private sector's share of GDP to 65%, elevate the percentage of FDI to GDP to 5.7% and increase the contribution of non-oil exports to GDP from 16% to 50%.

Meanwhile, the Saudi Central Bank figures from March 2022 indicate that FDI reached $19.3 billion in 2021 – its highest level in more than a decade. Although FDI dropped by 60% to $7.9 billion in 2022, it rebounded quickly, with Saudi Arabia reaching nearly $26 billion in FDI during 2023, exceeding the NIS target by 16%.

Investment in Arts, Entertainment & Recreation (2022)



Source: Ministry of Investment KSA

FDI Net Inflow: *The difference between FDI inflows (investments coming into a country) and outflows (investments leaving the country) within a given period.*

FDI Inflow: *The total value of direct investments made by foreign investors into a country within a specific period.*

FDI Stock: *The cumulative total of FDI inflows over time, representing the total value of foreign assets owned within a country.*

KSA Global Rankings

- **2nd** Globally in Cybersecurity Index
- **3rd** Among G20 Countries in Overall Performance
- **5th** Globally in Indicator of the Financial Market
- **6th** Globally in Economic Performance Axis
- **11th** Globally in Government Efficiency
- **13th** Globally in Business Efficiency
- **17th** Among 64 most Competitive Countries

Source: Saudi Press Agency



Trojena Ski Village, Saudi Arabia

Saudi Vision 2030

Highlights: Saudi Vision 2030 Goals on Track (As of 2023)

- 87% of 1,064 initiatives completed or on track
- 81% of 243 KPIs achieving their targets
- 105 indicators exceeding targets for 2024-25
- 106 million visitors in 2023, including 27.4 million international tourists
- 13.56 million Umrah performers in 2023, aiming 30 million by 2030
- KSA to host Expo 2030 in Riyadh
- 3,500+ tourism investment licenses issued in the Kingdom to date
- With the addition of Uruq Bani Ma'arid reserve, 7 UNESCO-listed sites in KSA
- A thriving small and medium enterprise (SME) sector to generate 35% of GDP by 2030
- Female representation in the labour force rises to 34%, estimated to reach 40% by 2030

Guided by Saudi Vision 2030, the Kingdom is not just diversifying its economy, it's also modernising its societal and cultural framework, thereby positioning itself as a global hub for tourism, leisure & entertainment, fashion and innovation, among others. A snapshot of Vision 2030 led developments uplifting KSA's already dynamic and diverse landscape, catalysing further growth.

• Over $1.25 Trillion invested in transformative real estate and infrastructure projects.

• The Public Investment Fund (PIF) sovereign wealth fund is spearheading large-scale projects in tourism and entertainment sectors. For perspective, the total assets under PIF stood at $750 billion in 2024, with a target to reach $2.66 Trillion by 2030. Playing a significant role in job creation, PIF portfolio companies created 93 new businesses in 2023, thereby generating over 644,000 jobs.

• The 'Quality of Life Program' focuses on enhancing various sectors, including arts, culture, sports and tourism. It aims to create over 600 new entertainment attractions and host more than 6,700 cultural events by 2030.

• In March 2024 the Kingdom launched the Tourism Investment Enablers Programme (TIEP) to make investing in the Saudi tourism sector more attractive for both international and domestic investors.

• The Kingdom aims to attract 150 million tourists by 2030. Working towards this goal, it has implemented numerous initiatives including an e-visa system for citizens of 57 countries, opening of its UNESCO World Heritage sites, construction of resorts on its Red Sea coast and the launch of a cruise line.

• Ambitious projects like the Red Sea Project – that aims to develop 90 islands along the Red Sea coast into a luxury resort destination, featuring high-end hotels, villas and entertainment venues, with a strong emphasis on eco-tourism and sustainability – are transforming the tourism landscape.

• Easing of restrictions on public entertainment, cinema and arts is fostering a vibrant cultural landscape. While events including Riyadh Season, Winter at Tantora and Formula 1 attract millions of visitors annually.

• The development of new sports facilities and the hosting of international sporting events are central to promoting healthier lifestyles and achieving regional excellence in selected professional sports.

• According to the Ministry of Finance, female participation in the workforce has reached 35%, well above the original target of 30%.

• KSA aims to become a net-zero economy by 2060 and launched the Saudi Green Initiative (SGI). It aims to maintain an investment fund for circular carbon economy solutions, targeting more than $186.6 billion in green investment by 2030.



King Salman Park, Riyadh



King Salman Park, Riyadh

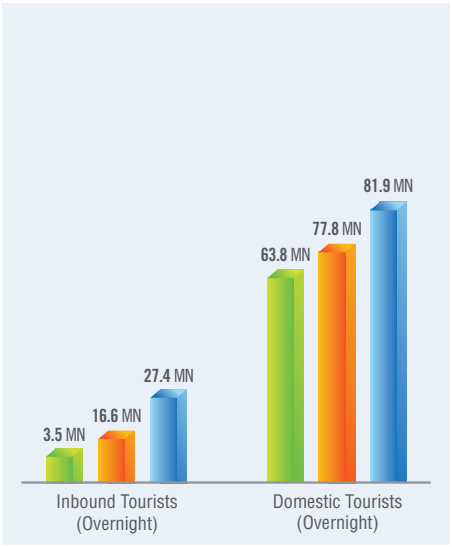
KSA Tourism Sector

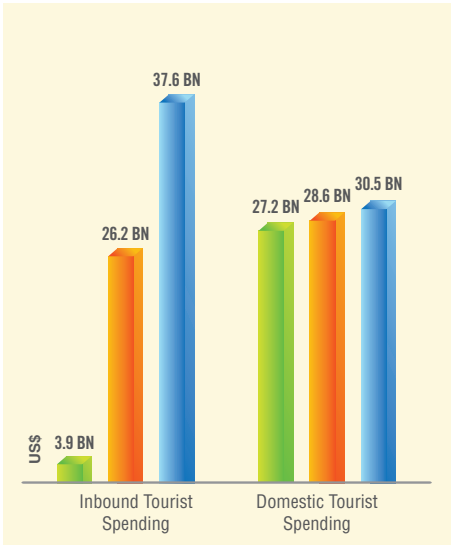
Travel, tourism, leisure and entertainment are priority sectors under Saudi Vision 2030. If anything, the entertainment sector has played a key role in reflecting the Kingdom's rapid and remarkable transformation over the past few years.

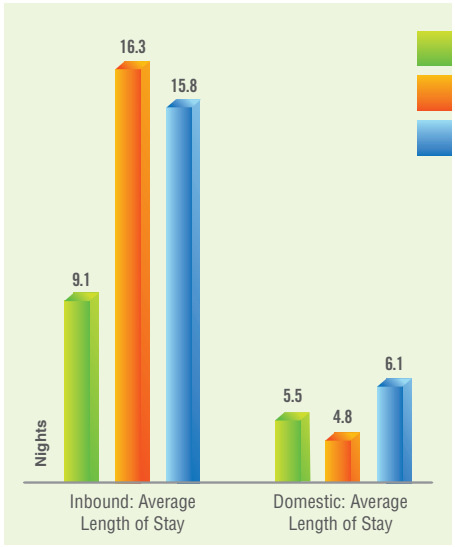
With mega developments underway, the government aims to increase domestic household spending on entertainment and leisure activities from 2.9% to 6% by 2030.

The leisure and entertainment sector in Saudi Arabia to create 450,000 jobs and contribute 4.2% to the country's GDP by 2030. The General Entertainment Authority has launched skill development and training initiatives to ensure 100% Saudization of the workforce in its leisure & entertainment sector.

Tourism Index





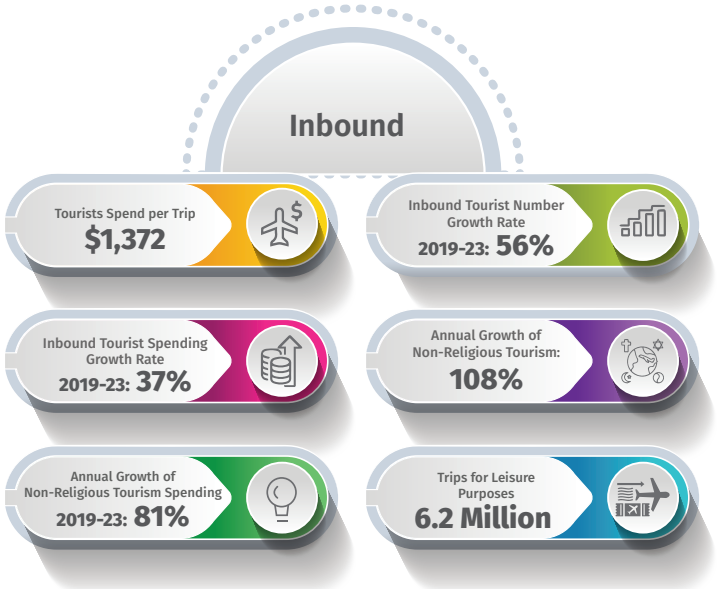


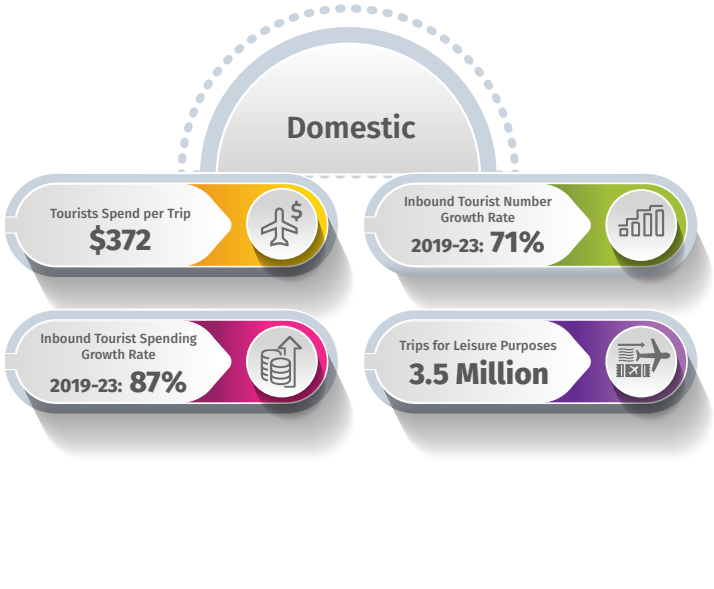
Total Number of Tourists 109.3 Million

Source: Ministry of Tourism KSA

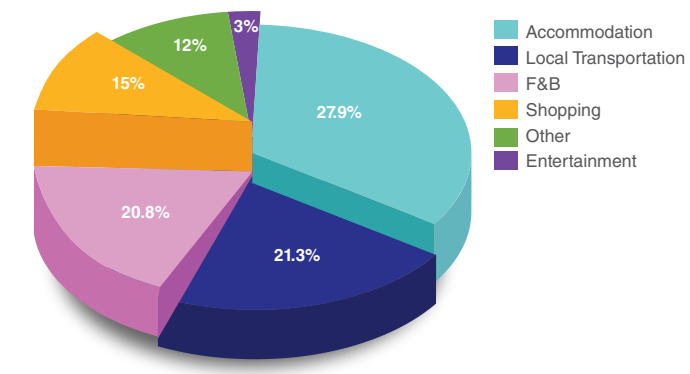
Total Tourist Spending $67.9 Billion

Source: Ministry of Tourism KSA

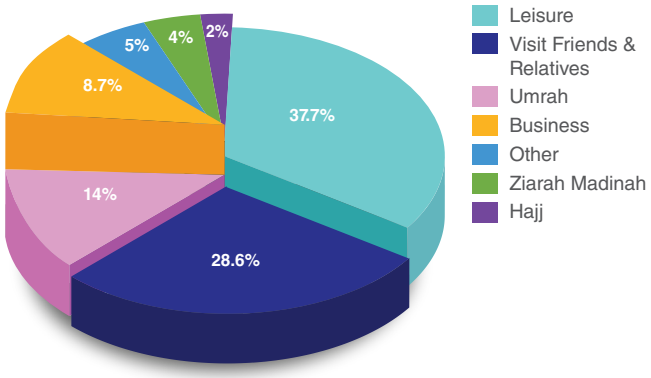




Tourist Spending by Category (2023)



Purpose of Visit (2023)



Source: Ministry of Tourism KSA

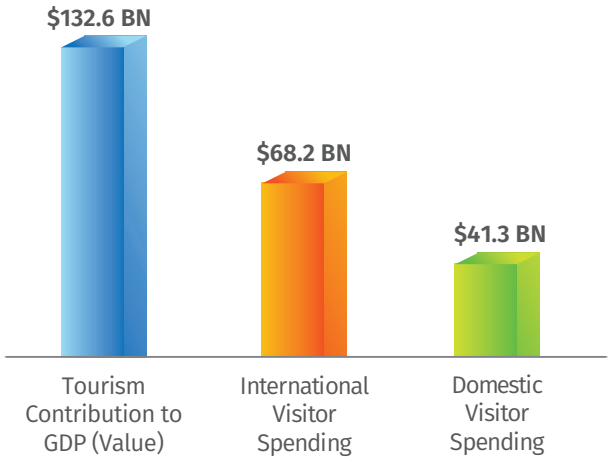
Giga Projects with Planned Hotel Keys

- NEOM: 40-80,000 Keys
- Ruaa Al Madinah: 47,000+ Keys
- Knowledge Economic City 40,000+ Keys
- Masar Makkah: 40,000+ Keys
- Dar Al Hijrah: 40,000+ Keys
- Thakher Makkah 28,000+ Keys
- Red Sea Project: 5-10,000 Keys

Source: Knight Frank

- Giga Projects Hotel Room by 2030: 225,000+ keys
- Total Number of Keys across KSA: 310,000
- Keys Planned in Riyadh, Jeddah and DMA: 32,000
- Total Development Cost: $110 Billion

Tourism Highlights - 2024 (Estimated Figures)



Jobs Generated 2.7 Million

Source: World Travel & Tourism Council

By 2034, tourism's contribution to KSA's GDP is forecasted to be $222.7 billion, accounting for almost 16% of the economy, employing more than 3.6 million people across the country.

Towards 2030

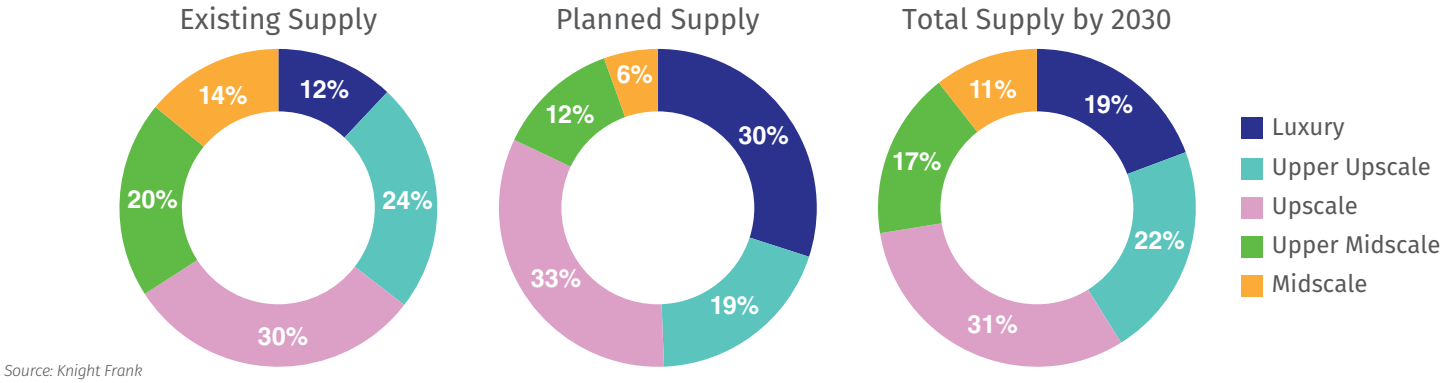
- Tourism Contribution to GDP: 10%
- 100 Million Overnight Visits
- 37 Million Plus Hajj & Umrah Visitors
- Tourism Contribution to Job Creation: 1.6 Million

Source: Kearney



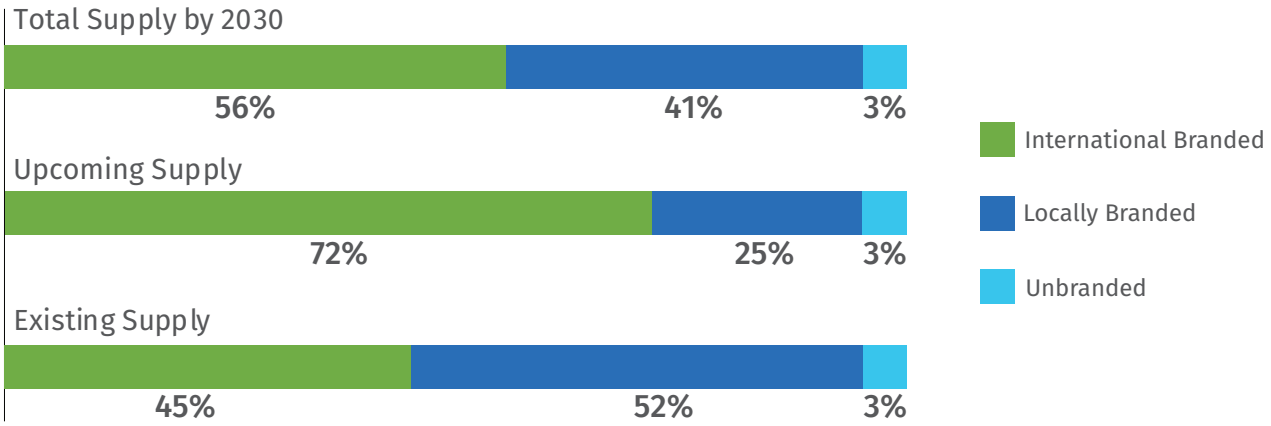
Hot air balloon festival over Mada in Saleh, Saudi Arabia

Saudi Arabia's Current & Future Hotel Room Supply Breakdown



Source: Knight Frank

Supply Breakdown by Operator Classification



The operator classification is based on hospitality groups with global presence, regional/local presence as well as unbranded (localised or even neighbourhood) entities.



Shebara Resort, Red Sea

KSA Leisure & Entertainment Industry

The General Entertainment Authority (GEA) has pledged to invest up to $64 billion by 2028 to develop Saudi Arabia's domestic entertainment sector. In fact, GEA has unveiled 29 investment opportunities across six key segments – including facilities, destinations, water parks, adventure parks, virtual reality parks and e-gaming centres – of the leisure & entertainment industry to diversify the landscape.

PIF subsidiaries Saudi Entertainment Ventures (SEVEN) and Qiddiya Investment Co. (QIC) merged in 2024. SEVEN is planning to open the first of its 21 destinations this year. While Qiddiya, valued at $9.8 billion by Knight Frank, aims to become the 'Disney World' equivalent of the Arab World with a goal to attract 48 million visitors annually. It will include a sports stadium expected to be ready to host 2034 Football World Cup. The Kingdom's sports strategy, implemented primarily by the PIF, is also a key pillar of the Saudi Vision 2030.

Meanwhile, PIF has been investing heavily in entertainment companies in recent years. Some of the companies that PIF has invested in include Activision Blizzard, Electronic Arts, Take-Two Interactive Software and Live Nation.

Finally, after the government lifted the 30-year ban on cinemas in 2018, there were 56 movie theatres in Saudi Arabia by 2022 that presented more than 1,144 films. The inaugural edition of the Red Sea International Film Festival featured 138 films and shorts from 67 countries in 34 languages.

KSA Hospitality Sector Snapshot (2024)

Total number of hotel keys announced, planned or under construction and due to be delivered by 2030

320,000

Estimated development cost of 320,000 hotel keys:

$104 Billion

Source: Knight Frank

KSA Events & Entertainment Landscape: A Snapshot

- Hosted the first-ever E-sports World Cup in 2024 and will host the E-sports Olympics in 2025
- $2 billion investments in sports events in 2023
- 31.1% of the market represented by sports events
- 10% annual growth expected for the concert segment until 2031
- Saudi events market volume to surpass $17.6 billion by 2031
- 4,000+ entertainment focused companies in 2024 from 10 in 2016
- Saudi Entertainment Ventures (SEVEN) to spend $13 billion to develop 21 destinations across 14 cities
- Qiddiya emerging as the 'Capital of Entertainment, Sports & Arts' in KSA
- Expo 2030 expected to add $95.9 billion to Riyadh's economy

Source: SetupinSaudi



Riyadh Season



بان
BAAN
ENTERTAINMENT

Sponkys
Snowy Forest
Splasa
Extreme Trampoline Park
Moonbug CoComelon Playdate
Sponkys Bowling
Sponkys Lasertag
Sponkys Trampoline
Fun Time
Playocity

Key Leisure & Entertainment Operators (MENALAC Members in bold)

- 1Noos
- **Adventure World**
- Ahaji Escape Rooms
- Al Kar Tourist Village KSA
- **Al Hokair Time**
- Al Shallal Theme Park (Fakeih Hospitality)
- Atallah Happy Land Park
- Billy Beez
- Bonkers
- **Boulevard World**
- Bounce Riyadh
- Carttel Jeddah
- Chuck E. Cheese
- **Cyan Waterpark**
- **Dreamscape**
- Escape Mission
- Escape the Room
- EXTREME Saudi Arabia
- **Fabyland**
- Fakih Aquarium
- Fanta Park
- Firstaiment
- Fun Time
- GO Karting
- Gravity Trampoline Parks
- Green Mountain Park
- **Hello Park**
- House of Hype Riyadh
- Ice Land
- Jump 4 Entertainment
- Jump Up Trampoline, Adventure and VR Park
- Jumpoline
- KidZania Jeddah
- Kids Lounge – Riyadh
- King Abdullah Park
- King Fahad Park
- **Koora Arena**
- Little Camels
- Live Show Arabia
- Lulu's Sprinkles
- Moon Toon
- Mosary Arena
- **Playocity**
- Sail Park (Fakieh Hospitality)
- **Saffori Land**
- **Sky Zone**
- **Snow City**
- **Snowy Forest**
- **Sparky's**
- **Splash Island**
- Takenda
- Tekzone
- **The Docksx**
- Toy Town
- Toys'R'Us Play Area
- **Xtreme Zone**



AlUla



Jeddah Central



Diriyah Gate



The Red Sea Project



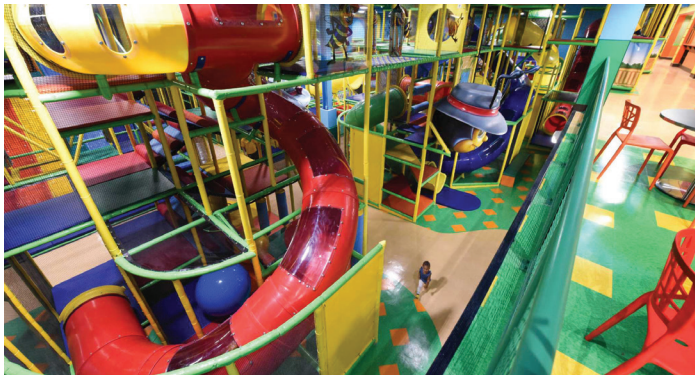
Six Flags Qiddiya



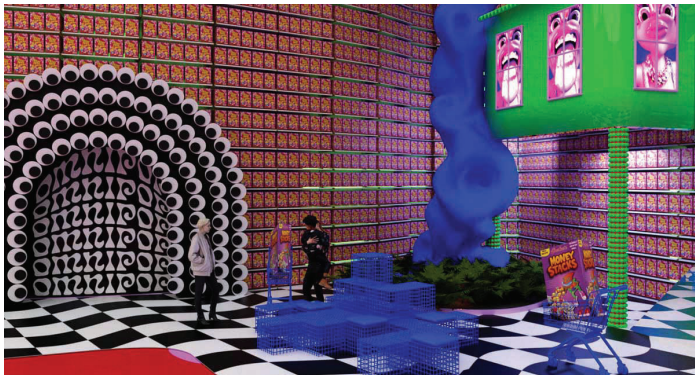
SEVEN Al Hamra



Boulevard Entertainment City



Billy Beez



House of Hype, Riyadh



KidZania Jeddah



Fanta Park



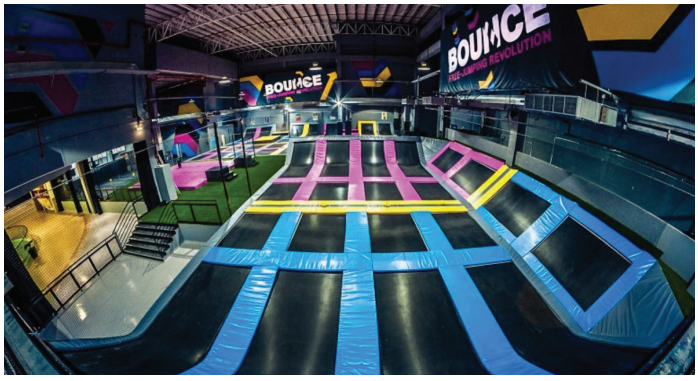
Jump Up Trampoline, Adventure & VR Park



Dragon Ball Theme Park



Moon Toon



Bounce Riyadh

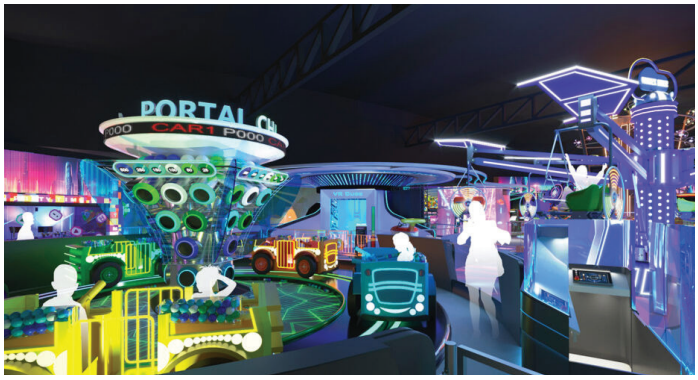


Sparky's


Fabyland


Saffori Land


The Docksx



Tekzone



Bonkers



Carttel Jeddah



Takenda


Magic Planet, Riyadh Park



Bob's Famous



Chuck E. Cheese



Xtreme Zone



Snowy Forest



Snow City



Playocity



Hello Park



Koora Arena



Cyan Waterpark



Dreamscape

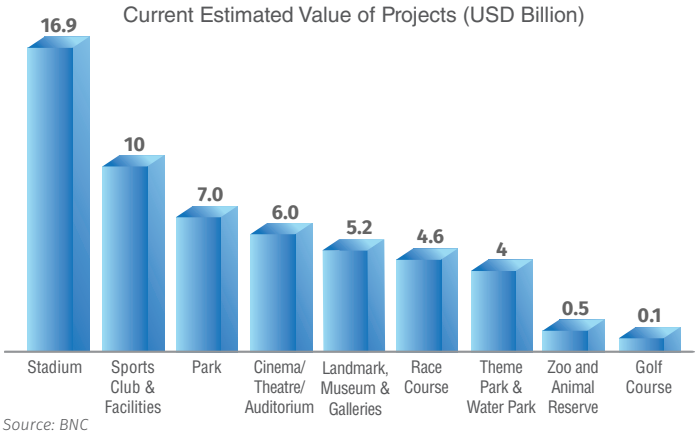


Al Hokair Time

Upcoming Mega Projects at a Glance

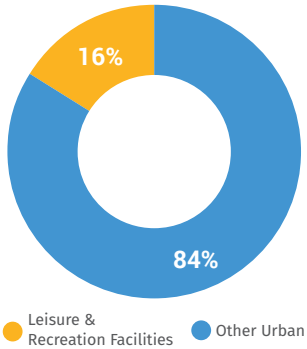
Saudi Arabia's upcoming mega and giga projects are poised to transform its economy by attracting foreign investments, creating jobs and boosting tourism, thereby enhance the country's global positioning, showcasing its ambition to be a leading business and cultural hub. For example, the Kingdom is set to host major global events, including Expo 2030 in Riyadh, the Asian Winter Games at Trojena in 2029 and the 2034 FIFA World Cup. These events will drive economic transformation, improve urban infrastructure and elevate the Kingdom's global positioning. It will also play a crucial role in non-oil economic diversification. For the 2034 FIFA World Cup alone, significant developments are underway, including new stadiums, transport enhancements and hospitality upgrades. A prime example is the recently announced 47,000-capacity Aramco Stadium, a collaboration between ROSHN Group and Saudi Aramco. In total, 15 stadiums are expected to be ready by 2034. However, it's also crucial to note that hosting mega-events requires extensive long-term planning and multi-stakeholder coordination, with governments facing challenges such as cost overruns. Overall, strategic initiatives, such as Red Sea resort developments and major events like gaming conferences and concerts, along with the unified GCC tourist visa, are expected to boost tourism. By 2030, tourism is expected to be a key economic pillar, with strong foreign investment in projects including NEOM, AMAALA and many more.

Saudi Arabia's Leisure & Recreation Market Distribution

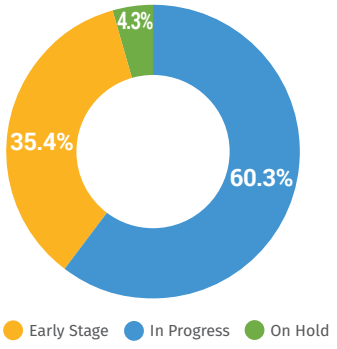


Source: BNC

Contribution of Leisure & Recreation Industry to Saudi Arabia's Urban Sector



Stage-wise Distribution



The New Murabba Project

An ambitious urban development initiative in Riyadh, encompassing a 19-sq km area, which aims to redefine the KSA capital's urban landscape by creating a modern downtown that harmoniously blends cultural heritage with futuristic design. The project is slated for completion by 2030, positioning Riyadh as a global hub for innovation, culture and commerce.

Key Features:

The Mukaab:

Serving as the project's centrepiece, the Mukaab is a colossal cube-shaped skyscraper standing 400 metres tall and wide. It will house a spiralling tower encased within a 1,300-foot-tall dome-structured atrium, offering immersive experiences through advanced technologies.

Cultural and Entertainment Venues:

New Murabba is set to feature more than 80 entertainment and cultural venues, including an iconic museum, a technology and design university and a multipurpose immersive theatre, enriching the city's cultural landscape.

Residential and Commercial Spaces:

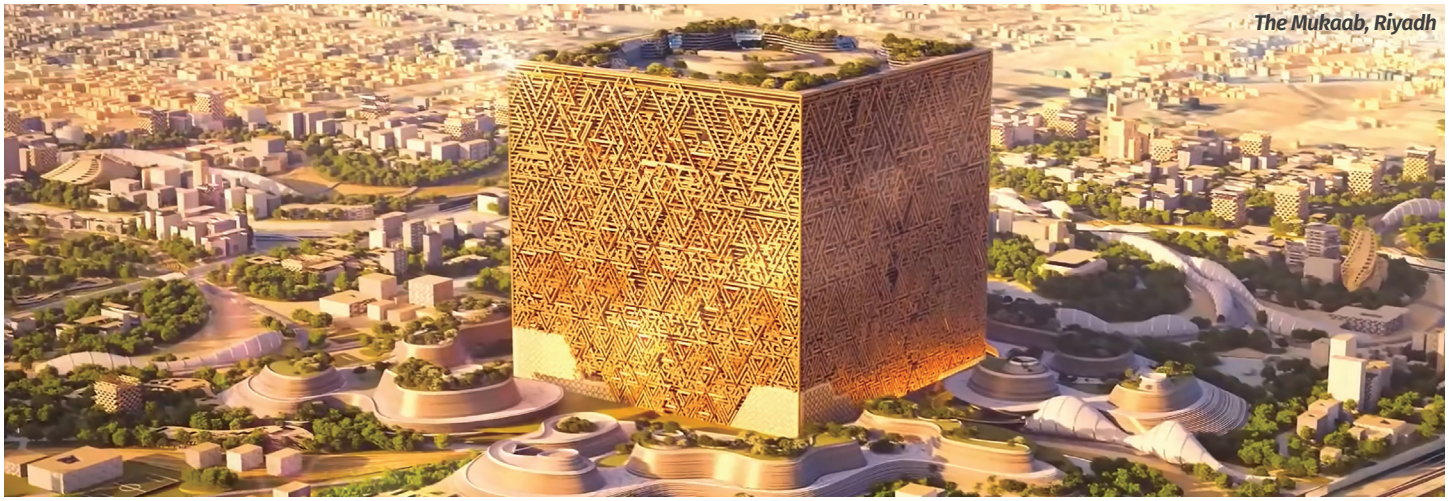
The development plans include over 104,000 residential units and 9,000 hotel rooms, catering to a diverse population. Additionally, more than 980,000 sqaure metres (sqm) are allocated for retail space, alongside extensive office and leisure facilities.

Sustainability and Green Spaces:

Aligned with Saudi Arabia's Vision 2030, the project emphasises sustainability, dedicating 25% of its area to green spaces.

Economic Impact:

The New Murabba Project is expected to add an estimated $48 billion to Saudi Arabia's non-oil GDP, creating around 334,000 direct and indirect jobs by 2030.



The Mukaab, Riyadh



Hosting the FIFA World Cup 2034 would be a game-changer for Saudi Arabia's economy, driving tourism, infrastructure investment and job creation, while boosting sectors including hospitality, retail and entertainment.

Hosting the FIFA World Cup 2034 is set to be a game-changer for Saudi Arabia's economy, attracting over $240 billion in global investments and driving economic diversification under Vision 2030. The Kingdom plans to build 11 new stadiums, with a total of 15 venues across 5 host cities, including Riyadh, Jeddah, Al Khobar, Abha and Neom, the futuristic city on the Red Sea coast. Riyadh will feature eight stadiums, including the 92,000-capacity King Salman Stadium, set to host the opening and final games. These developments are expected to boost key sectors such as tourism, hospitality and infrastructure, solidifying Saudi Arabia's position as a global investment hub.

The Arena - Diriyah Gate

Value: USD 500 million
Stage: Under Construction
Developers: Diriyah Gate Development Authority
Description: The 20,000-seat Arena in Diriyah covers 76,000 sqm and aims to be the top venue in the Middle East, drawing visitors from around the world and changing the region's events scene. Inspired by the natural surroundings of Diriyah and traditional Najdi architecture, the Arena can quickly change its layout to host different events. It's designed with top-notch sound and views from every seat. This venue offers more than just events—it's connected to a lively shopping and dining area. And nearby, there's the Plaza for outdoor performances and a park for everyone to enjoy. The Arena in Diriyah is a key part of Saudi Arabia's plan to boost entertainment, in line with Saudi Vision 2030.
Completion: Q4 2025



THE RIG - Arabian Gulf

Value: USD 5 billion
Stage: Under Construction
Developers: Oil Park Development Company (OPDC), Saudi Contractors Authority, PIF, Maritime Company for Navigation (MACNA)
Description: THE RIG will comprise a hospitality and adventure experience sprawling over a gross floor area exceeding 300,000 square metres (sqm), positioned approximately 40 km away from the coast, in proximity to Al Juraid Island and the Berri Oil Field on the Arabian Gulf. Comprising four key elements, namely The Moonpool, The Derrick (featuring an amusement park), The Riser (housing a splash park) and The Jackup (hosting an immersive theatre on a repurposed jack-up rig), THE RIG will provide a range of water activities, including a diving centre, an e-sports centre and a 6,000-person multipurpose arena. In addition to these features, THE RIG will offer various hospitality, leisure, entertainment and accommodation options.
Completion: Q3 2030



Soudah Peaks - Phase 1

Value: USD 2 billion
Stage: Design
Developers: Soudah Development Company, PIF
Main Contractors: Nesma & Partners Contracting Company
Description: The project involves the construction of phase 1 of Soudah Peaks. It will will offer 940 hotel rooms, 391 residential units and 32,000 sqm of retail space.
Completion: Q4 2029



Amalaa

Value: USD 6.13 billion
Stage: Under Construction
Developers: RSG (Red Sea Global)
Description: AMAALA was conceived as a family wellness destination in Saudi Arabia, promising to offer restorative experiences. Situated along the Red Sea coast in north-western Saudi Arabia, AMAALA is being developed as a luxury tourism destination spanning 4,000 sq km. This year-round retreat promises to provide a wide range of activities to suit all interests – including sea and sun, sports, arts and culture – ensuring every guest enjoys a truly unforgettable experience. The first phase of AMAALA's development was centred on the Triple Bay masterplan, which featured approximately 1,300 rooms across eight hotels. Upon full completion in 2027, AMAALA will boast over 3,000 hotel rooms across 25 hotels, 943 luxury residential villas and an array of high-end retail and dining outlets, alongside a yacht club, wellness centres and recreational facilities.
Completion: Q4 2027



Green Riyadh - City Park 1 - North of Riyadh

Value: USD 1.1 billion
Stage: Under Construction
Developers: Royal Commission for Riyadh City
Main Contractors: Modern Building Leaders
Description: The City Park in northern Riyadh blends recreation and sustainability, spanning 1.2 million sqm of landscaped gardens and featuring an 11-km wadi network with 771,226 sqm of floodable zones for water management. It includes botanical gardens, 50,000 trees providing 65% canopy coverage, trails, picnic nodes, workout stations and playgrounds. Amenities like a nursery, amphitheatre, cafés and prayer plaza enhance the community spaces. Sustainable irrigation, supported by a TSE tank, polishing plant and advanced distribution systems, ensures water efficiency, making the park a key green space in Riyadh.
Completion: Q4 2027



Entertainment Complex - Exit 10

Value: USD 800 million
Stage: Under Construction
Developers: Saudi Entertainment Ventures Company (SEVEN), PIF, Hasbro
Main Contractors: Shapoorji Pallonji & Co. Ltd.
Description: The entertainment complex, spanning 90,000 sqm with a built-up area of 167,000 sqm, will feature many signature entertainment experiences including an indoor hubless wheel, Wave House indoor surfing, a 10-lane bowling alley, indoor skydiving, an indoor karting racetrack, as well as cinemas, restaurants, cafes, international retail stores and fitness centre(s). The project will also include an indoor adventure centre and an edutainment hub, as well as the world's first indoor Transformers Entertainment Centre that will provide visitors with state-of-the-art rides and an immersive environment.
Completion: Q4 2025



Opera House - Jeddah Central District Development

Value: USD 600 million
Stage: Under Construction
Developers: General Authority For Entertainment, Jeddah Central Development Company, Jeddah Development & Urban Regeneration Company, PIF
Main Contractors: Modern Building Leaders
Description: As part of the cultural objectives outlined in Saudi Vision 2030, Jeddah Central's Opera House will comprise three theatres with a total seating capacity of 2,400. These include 1,500 seats in the main theatre, 700 in the medium theatre and 200 in the training hall. Additionally, the Opera House, designed to host multiple events, will have a spacious entrance facilitating diverse building activities.
Completion: Q4 2027



Al Qiddiya Entertainment City

Value: USD 20 billion
Stage: Under Construction
Developers: Qiddiya Investment Company, Public Investment Fund (PIF) of Saudi Arabia
Main Contractors: Varied
Description: Qiddiya is a flagship giga-project under Saudi Vision 2030, designed to be the world's largest entertainment city. The phase 2 of the project expands on the initial developments, adding new theme parks, sports facilities and residential zones. Announced in late 2024, this phase aims to bolster Qiddiya's goal of attracting 17 million visitors annually by 2030. It includes sustainable infrastructure and smart city technologies. Recent announcements include plans for a motorsport district and an expanded Six Flags theme park. The mega entertainment city spread across 334 sq km is located 40 km Southwest of Riyadh. The project will be an important entertainment, sports and cultural destination in the Kingdom. Al Qiddiya Entertainment City will be divided into five zones: Resort Core, City Centre, Motion Zone, EcoZone and Golf Community.
Completion: Q4 2035



The Avenues Mall - Al Malqa

Value: USD 4.3 billion
Stage: Under Construction
Developers: Al Fozan Group, Alshaya Group, Al Mabanee Real Estate Company, Shomoul Holding Company
Main Contractors: Nesma & Partners Contracting Company
Description: The project involves the construction of a shopping mall complex with a leasable area of approximately 400,000 sqm, housing more than 1,300 stores as well as exhibition & conference halls, offices and medical facilities. The project will have a total built-up area of 1.8 million sqm along with two basement levels for car parking accommodating up to 16,000 cars.
Completion: Q1 2026



Khuzam Sports City

Value: USD 3.6 billion
Stage: Concept
Developers: National Housing Company (NHC)
Description: The project involves the construction of a Khuzam Sports City located in the Khuzam suburb. Spanning approximately 135,000 sqm, the project will offer outdoor and indoor football fields, enclosed facilities for various sports, outdoor tennis courts, sports training academies, men's and women's sports clubs, an electronic games centre, an entertainment zone, a spa, a sports promenade and a commercial plaza housing restaurants and cafes.
Completion: Q4 2028



Riyadh Metro Expansion - Lines 7 and 8

Value: USD 3.2 billion
Client: Royal Commission for Riyadh City (RCRC)
Consultant: Parsons Corporation
Description: Following the initial six-line Riyadh Metro launch, Lines 7 and 8 were announced in January 2025 to connect underserved districts and industrial zones, enhancing urban mobility. The project includes 45 km of new tracks and 20 stations, with completion targeted for 2030. It aligns with Riyadh's goal to become a global logistics hub.
Completion: 2030



Almanar - Roshn - Phase 1

Value: USD 2 billion
Stage: Design
Developers: Roshn
Description: The project involves the construction of phase 1 of Almanar. The project is designed to accommodate 4,149 residential units, capable of housing 17,000 individuals within a space of 2.5 million sqm. It will encompass various facilities, such as a regional mall complemented by eight neighbourhood commercial centres, a business park aimed at enhancing the city's economic growth and multiple mosques. The project will offer a diverse range of residential choices, including 3- to 5-bedroom townhouses, duplexes and villas.
Completion: Q4 2030



Royal Art Complex - King Salman Park

Value: USD 2 billion
Stage: Under Construction
Developers: Royal Commission for Riyadh City
Main Contractors: Modern Building Leaders
Description: The project involves the construction of an art complex located on a land spanning over 400,000 sqm at King Salman Park in Riyadh. The project will include a national theatre (2,500 seat capacity), 5 museums of various sizes, an outdoor theatre (capacity of 8,000 viewers), 3 movie theatres, 4 art academies and an educational cultural centre for children.
Completion: Q2 2025



Al Serafi Mega City

Value: USD 1 billion
Stage: Under Construction
Developers: Hyatt Hotels Corporation, Cenomi (formerly known as 'Fawaz Al Hokair Group'), Alsalehat Holding Co.
Main Contractors: Ghonaim International Co.
Description: : The project involves the construction of a mixed-use development consisting of a hospital, a 5-star hotel operated by Hyatt Regency comprising a ground floor and 24 additional floors, 2 office towers each comprising a ground floor and 24 additional floors and a shopping mall comprising a basement level, a ground floor and 3 additional floors. The commercial centre, Jeddah Park, will house a large Cineplex, boasting 15 screens and 1,541 seats in a total area of 6,525 sqm and a broad range of retail offerings, including the finest global and local brands in the areas of fashion, beauty and food & beverage. It will also include spaces dedicated to entertainment facilities and a hypermarket.
Completion: Q1 2026

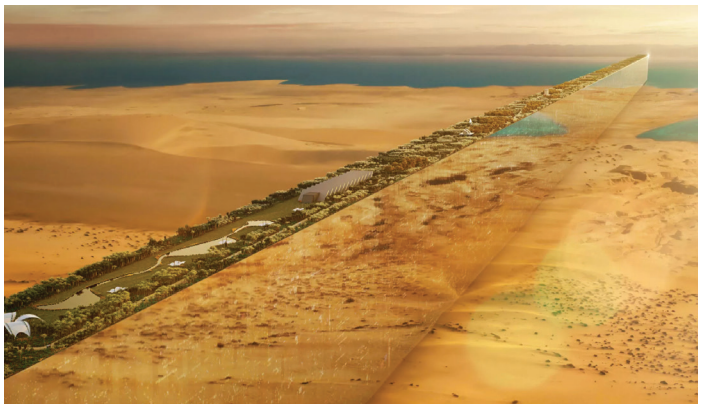


Al Malga Urban Village

Value: USD 600 million
Stage: Tender
Developers: Royal Commission for Riyadh City
Description: The project involves the construction of a hotel and residences, featuring retail, F&B, offices and a 5-star hotel, spanning 74,810 sqm with a total built-up area of 227,101 sqm. The hotel will include 200 keys, comprising 130 standard rooms and suites, along with 25 one-bedroom, 35 two-bedroom and 10 three-bedroom serviced apartments. Situated within the mixed-use Al Malga Urban Village neighbourhood, the Mondrian Riyadh Al Malga Hotel and Residences aims to redefine hospitality in the region. Spearheading innovative culinary and mixology experiences, it will host three distinct restaurants and lounges conceptualised by its in-house F&B concept studio, Carte Blanched.
Completion: Q4 2030



NEOM - The Line Phase 1B



Value: USD 5.4 billion
Stage: Construction is slated to begin in Q3 2025
Client: NEOM Company (backed by PIF)
Consultant: Bechtel (continuing from Phase 1A)
Description: The Line is NEOM's revolutionary 170-km-long linear city. The recently announced Phase 1B focuses on extending residential and commercial zones, including a high-speed rail link and additional AI-driven urban systems. This phase builds on the foundational work of 2023-24, with an emphasis on renewable energy integration and zero-carbon urban living.
Completion: 2030

Knowledge Economic City



Value: NA
Stage: NA
Developers: Marriott International
Description: The Knowledge Economic City (KEC) in Madinah has partnered with Marriott International to introduce three new hotels as part of its expansive master development. Together, they will deliver over 1,200 rooms across three brands – Courtyard by Marriott, Four Points by Sheraton and Residence Inn by Marriott. Located within KEC's Islamic World District, a vibrant area featuring cultural attractions, museums and public plazas, the hotels aim to enhance Madinah's hospitality offerings in line with Saudi Vision 2030 goals. Courtyard by Marriott will offer 456 rooms with dining and meeting facilities; Four Points by Sheraton will feature 558 guestrooms and casual amenities; and Residence Inn will provide 250 extended-stay units with full kitchens. The development, spread across 6.8 million sqm, is designed around three pillars of technology, knowledge and sustainability and is connected to the Haramain High-Speed Railway. The partnership reflects a strategic effort to diversify Madinah's economy and elevate its status as a global destination.
Completion: NA

Red Sea Project - Phase 2 (Coastal Villages)



Value: USD 4.1 billion
Client: Red Sea Global (RSG), a PIF subsidiary
Consultant: WSP Global
Contractor: Besix and Almabani General Contractors (expected, based on Phase 1 involvement)
Description: Part of the Red Sea Global (RSG) tourism initiative, Phase 2 introduces luxury coastal villages along the Red Sea, featuring overwater villas, marinas and eco-resorts. Announced in late 2024, it expands on Phase 1's completed islands. This phase targets 50% completion by 2027, with a focus on sustainable tourism and marine conservation.
Completion: NA

Diriyah Gate - The At-Turaif Cultural District Expansion



Value: USD 1.9 billion
Client: Diriyah Gate Development Authority (DGDA)
Consultant: AtkinsRéalis
Contractor: Saudi Binladin Group (tentative)
Description: A UNESCO World Heritage site redevelopment, this expansion includes new museums, cultural centres and luxury hotels, announced in early 2025 to boost heritage tourism. The project aims to preserve At-Turaif's historical significance while adding modern amenities, targeting 15 million annual visitors by 2030.
Completion: NA

Jeddah Central Project - Phase 1

Value: USD 7.2 billion
Client: Jeddah Central Development Company (JCDC), a PIF entity
Consultant: AECOM
Contractor: Not yet awarded; likely candidates include CRCC and ACC Arabian
Description: A mixed-use development that will transform Jeddah's waterfront, featuring an opera house, museum, sports stadium and residential towers. Announced in December 2024, it's part of Jeddah's urban renewal. Phase 1 focuses on cultural and recreational facilities, with groundwork starting in late 2025.
Completion: NA



King Salman Energy Park (SPARK) - Phase 3

Value: USD 2.3 billion
Client: Saudi Aramco
Consultant: Fluor Corporation
Contractor: Tecnicas Reunidas (speculative, based on energy sector expertise)
Description: SPARK is an industrial city for energy-related businesses. Phase 3, announced in 2025, adds advanced manufacturing hubs and renewable energy plants. This phase supports Saudi Arabia's energy diversification.
Completion: 2028



AlUla - Sharaan Nature Reserve Eco-Tourism Development

Value: USD 1.5 billion
Client: Royal Commission for AlUla (RCU)
Consultant: Foster + Partners
Contractor: Not yet assigned; likely contenders include Nesma & Partners
Description: A newly announced eco-tourism project in AlUla, featuring luxury desert lodges, archaeological site enhancements and sustainable trails, launched in January 2025. The project aims to attract 2 million visitors annually by 2035, while preserving AlUla's natural and cultural heritage.
Completion: NA



King Abdullah Financial District (KAFD) - Phase 3

Value: USD 2.6 billion
Client: KAFD Development and Management Company
Consultant: Gensler
Contractor: El Seif Engineering Contracting (tentative)
Description: This project aims to expand Riyadh's financial hub with new office towers, retail spaces and a fintech innovation centre, announced in early 2025. It promises to solidify Riyadh's position as a Middle Eastern financial capital by 2030.



MENA Leisure Report 2025



Kuwait Towers at night



STATE OF KUWAIT

Kuwait is undergoing a transformative period with economic diversification and sustainable development initiatives being at the heart of this transformation.

Geography & Historical Background

Kuwait, a small but strategically significant nation in the Arabian Gulf, is bordered by Iraq to the north and west, Saudi Arabia to the south and the Gulf to the east. Its territory spans approximately 17,818 square kilometres (sq km), including nine islands, with Kuwait City as its capital. The country's geography is largely flat, consisting of desert terrain, and it experiences an arid climate with hot summers and mild winters. Kuwait's location at the head of the Gulf makes it a critical hub for trade and energy transit.

Historically, Kuwait has been at crossroads for regional trade and maritime activities. Its origins date back to the 18th century when the Bani Utub tribe settled in the area and established a thriving port. By the 20th century, Kuwait evolved into a significant centre for pearling and trade. The discovery of oil in 1938 transformed Kuwait into one of the world's wealthiest nations.

Strategically, Kuwait holds immense importance due to its vast oil reserves and position within the Gulf. As a founding member of OPEC (Organization of the Petroleum Exporting Countries), it plays a key role in global energy markets. In addition, Kuwait's political stability and strong alliances, particularly with Western nations, underscore its role as a pivotal player in regional geopolitics.

Population

According to the World Population Review, Kuwait's population stood at 4.97 million in 2024, up from approximately 4.8 million the previous year and is projected to reach 5.3 million in 2030. The country's median age is 29 years currently, with a total life expectancy of 78.2 years.

According to the International Monetary Fund (IMF), Kuwait's employment increased by 7.5% in 2023 to 2.1 million, driven by a 9% rise in expatriate workers to 1.7 million. However, employment growth declined to 2.5% (y-o-y) in the second quarter of 2024 from 4.7% (y-o-y) during the corresponding period in 2023, reflecting a slowdown in expatriate employment growth.

IMF also recommends labour market reforms to be phased in to incentivise private sector-led inclusive growth for Kuwaiti nationals, which will support the country's non-oil growth and private sector employment gains. Meanwhile, employment of highly skilled expatriate workers should be supported by introducing targeted visa programmes and reforming job sponsorship frameworks, thereby promoting knowledge transfer. As a forward-looking move, the country has introduced policies to support women's employment, including equal pay regulations, childcare support and promoting flexible working arrangements.



Kuwait at a Glance

Official Name	Kuwait
Land Area	17,818 sq km
Capital	Kuwait City
Government	Constitutional Monarchy
Emir	His Highness Sheikh Mishal Al-Ahmad Al-Jaber Al-Sabah
Population (2024)	5 Million
Population Density	276.9 per sq km
Population Growth	2.12%
Nationality Split	Approximately 30% Kuwaiti and 70% expatriates
GDP (2023)	$163.7 Billion
GDP Per Capita (2023)	$33,730
GDP Growth (2023)	-3.6%
Inflation – Consumer Prices (2023)	3.6%
Industries	Oil & gas, financial services, renewable energy, healthcare, construction, Information and Communication Technology (ICT), consumer & retail
National Day	February 25, 1950
Independence Day	June 19, 1961
Official Language	Arabic
Dominant Religion	Islam
Currency	Kuwaiti Dinar
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+965

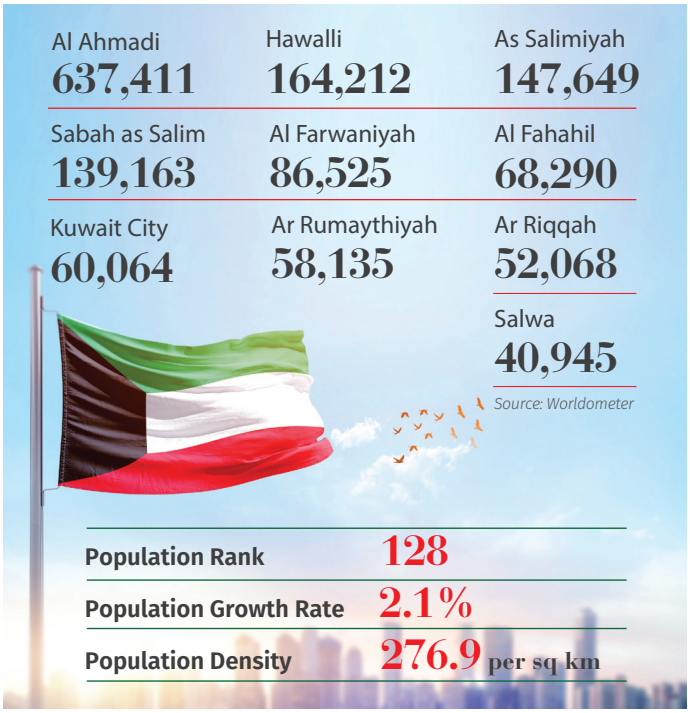
Sources: The CIA World Factbook, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	264,800	134,400	130,400
5 – 9	310,100	158,400	151,700
10 – 14	324,000	166,700	157,300
15 – 19	283,600	145,700	137,900
20 – 24	240,700	126,300	114,400
25 – 29	428,200	281,200	147,000
30 – 34	520,600	343,200	177,400
35 – 39	626,400	407,900	218,500
40 – 44	599,100	398,900	200,200
45 – 49	463,700	303,300	160,400
50 – 54	347,400	227,100	120,300
55 – 59	236,600	155,700	80,900
60 – 64	136,100	85,300	50,800
65 – 69	74,500	43,200	31,300
70 – 74	39,600	20,800	18,800
75 – 79	21,400	9,900	11,500
80+	17,466	7,765	9,701

Source: World Population Review

Population per City (2025)



Source: World Population Review

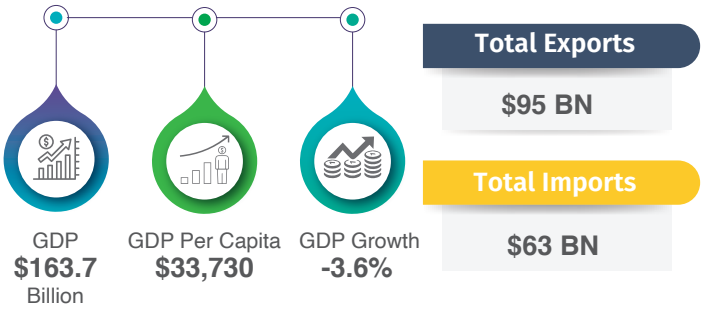
Economy

The World Bank's Spring 2024 Gulf Economic Update projected Kuwait's economic growth to rebound to 2.8% in 2024, driven by expansionary fiscal policies, increased oil production and higher output from the Al Zour refinery. Oil output is expected to rise by 3.6%, while the non-oil sector is forecasted to grow by 2.1%. However, relatively high interest rates may dampen domestic consumption, limiting the economy's potential. Additionally, ongoing political uncertainties could delay new infrastructure projects and slow the progress of reform initiatives.

Overall, according to the World Bank, Kuwait's economy remains heavily reliant on oil and gas, which account for over 90% of its exports and government revenue, thereby impacting economic diversification. While the Kuwait Investment Authority (KIA) holds substantial foreign assets that contribute to macroeconomic stability, these assets alone cannot entirely shield the economy from the effects of global oil market volatility and the anticipated long-term decline in oil demand. Major challenges could include the risks associated with fluctuating oil production and prices, a potential global economic slowdown and the growing impact of climate-related shocks.

Meanwhile, as the country seeks to diversify its economy from being resource-based to knowledge-based, increased privatisation will be crucial, stated an Oxford Business Group report. Therein the development of the small and medium-sized enterprises ecosystem will likely play a crucial role in building a versatile business community.

State of Economy Highlights (2023)



Sources: World Bank & CIA The World Factbook

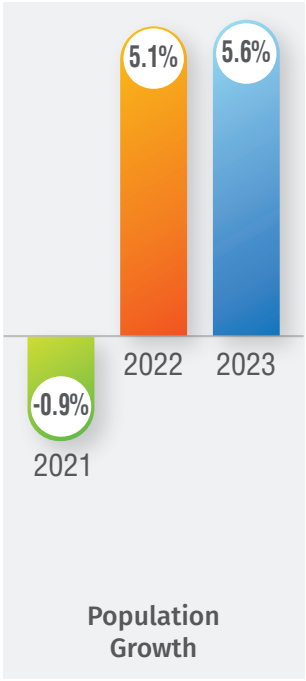
GDP Projections

Indicators	2024 (Estimated)	2025 (Projected)	2026 (Forecasted)
Real GDP Growth	-1.0%	2.5%	2.7%
Growth in Exports	-2.5%	2.9%	3%
Growth in Imports	2.8%	2.9%	2.6%
CPI Inflation (Average)	3.1%	2.7%	2.5%

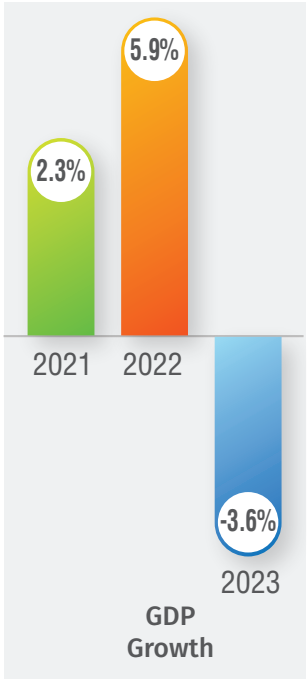
Source: World Bank


Sheikh Jaber Al Ahmad Cultural Centre

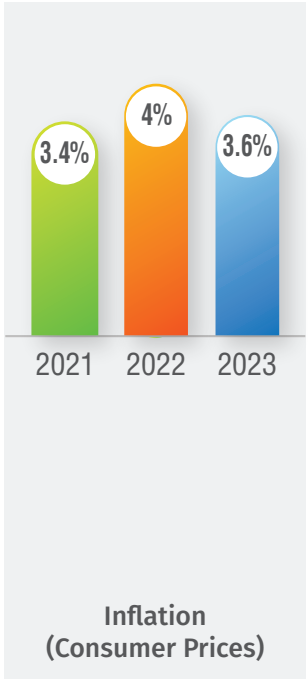
Key Macroeconomic Highlights



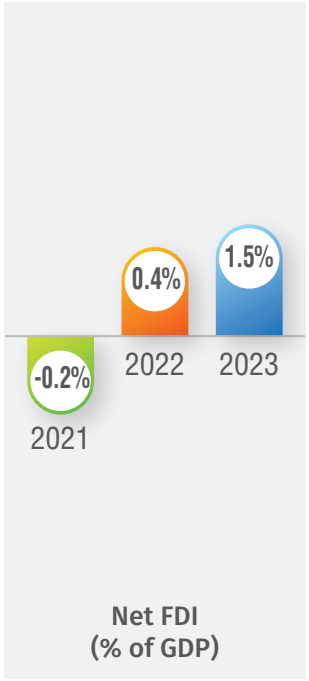
Population Growth



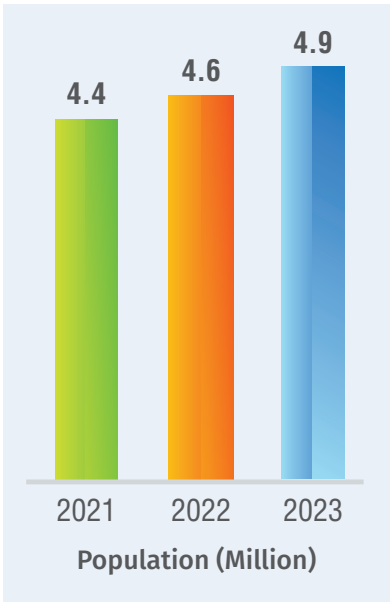
GDP Growth



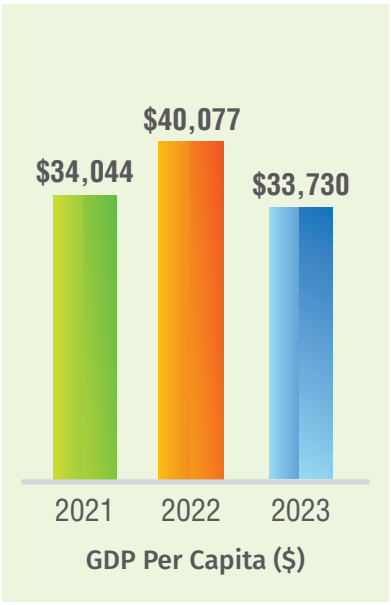
Inflation (Consumer Prices)



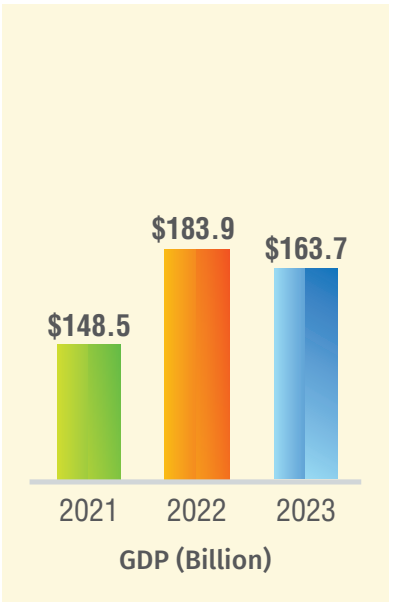
Net FDI (% of GDP)



Population (Million)



GDP Per Capita ($)



GDP (Billion)

Source: World Bank

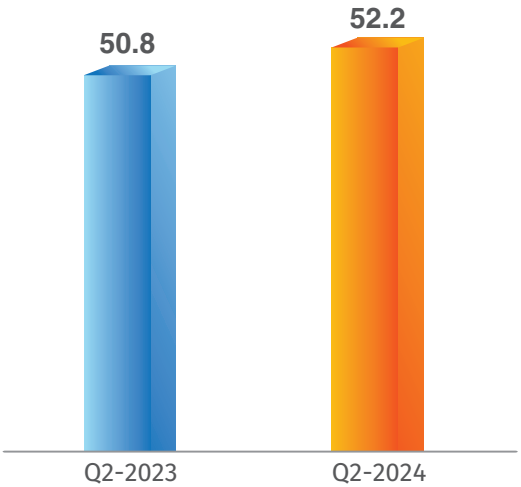
GDP declined by **2.7% Y-o-Y** in **Q1-2024,** following a **4.4%** contraction in **Q4-2023**

Oil-led growth contracted by **9.8% Y-o-Y,** versus a **6.8%** decline in **Q4-2023**

Non-oil sector grew at **4.7%** in **Q1-2024** after a contraction of **2.3%** in **Q4-2023**

Source: World Bank

Purchasing Managers Index (PMI)



Non-oil Private-sector Activities

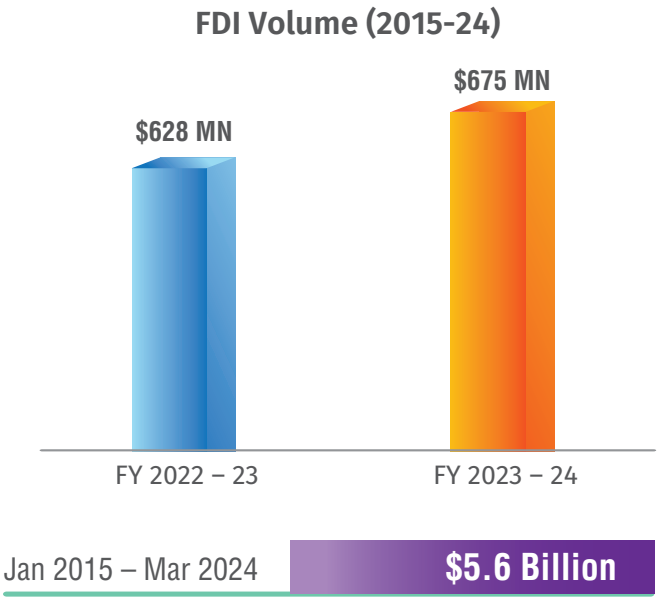
PMI indicates economic health for sectors such as manufacturing.

Source: S&P Global Kuwait

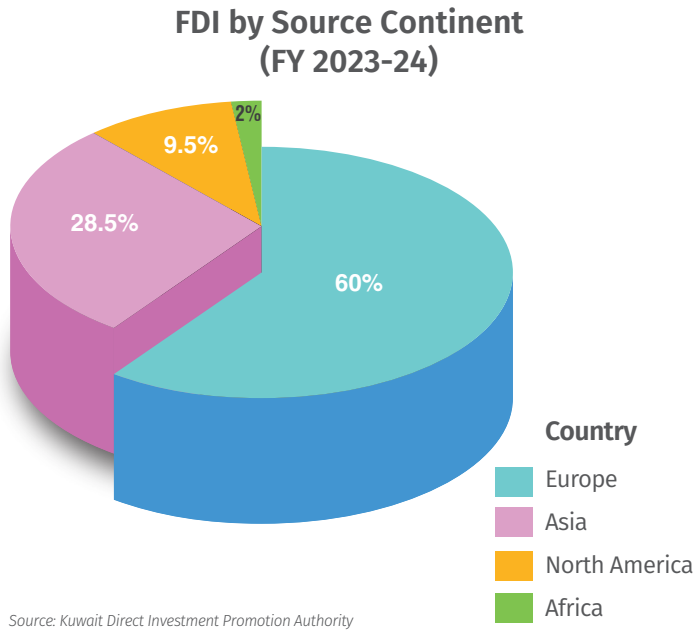
Investment

Kuwait is actively pursuing private and international investment to support its economic diversification and privatisation initiatives. While amendments to investment laws have been made, challenges persist, including complex bureaucratic procedures during tendering or government-related sales and intricate legal requirements for shipping activities. Other obstacles include high business costs, contradictory regulations and a preference for domestic entities, a trend seen across the GCC economies.

Kuwait aims to attract $200 billion in foreign direct investment (FDI) between 2020 and 2035, centred on physical and digital infrastructure development. Achieving these goals depends on political cohesion and robust private sector engagement, while offering 100% foreign business ownership may appeal to global investors seeking a Middle Eastern presence. With these measures, Kuwait can diversify exports, industries and revenue streams while leveraging its sovereign mechanisms to expand its global investment portfolio and economic footprint.



Source: Kuwait Direct Investment Promotion Authority



Source: Kuwait Direct Investment Promotion Authority



The Avenues Mall



Kuwait Vision 2035

Kuwait Vision 2035, or the "New Kuwait" aspires to transform the country into a prominent regional and international financial and trade hub. The Vision, structured around seven strategic pillars, emphasises an economy driven by the private sector, fostering competition and enhancing production efficiency. It also focuses on establishing a supportive institutional framework that upholds national values, preserves social identity, promotes social development and creates a business-friendly environment.

Key Goals at a Glance

Economy:
Diversify the economy by reducing dependence on oil revenues, promoting private sector growth and attracting foreign investments.

Infrastructure:
Develop and modernise infrastructure to support economic growth, including transportation, housing and telecommunications.

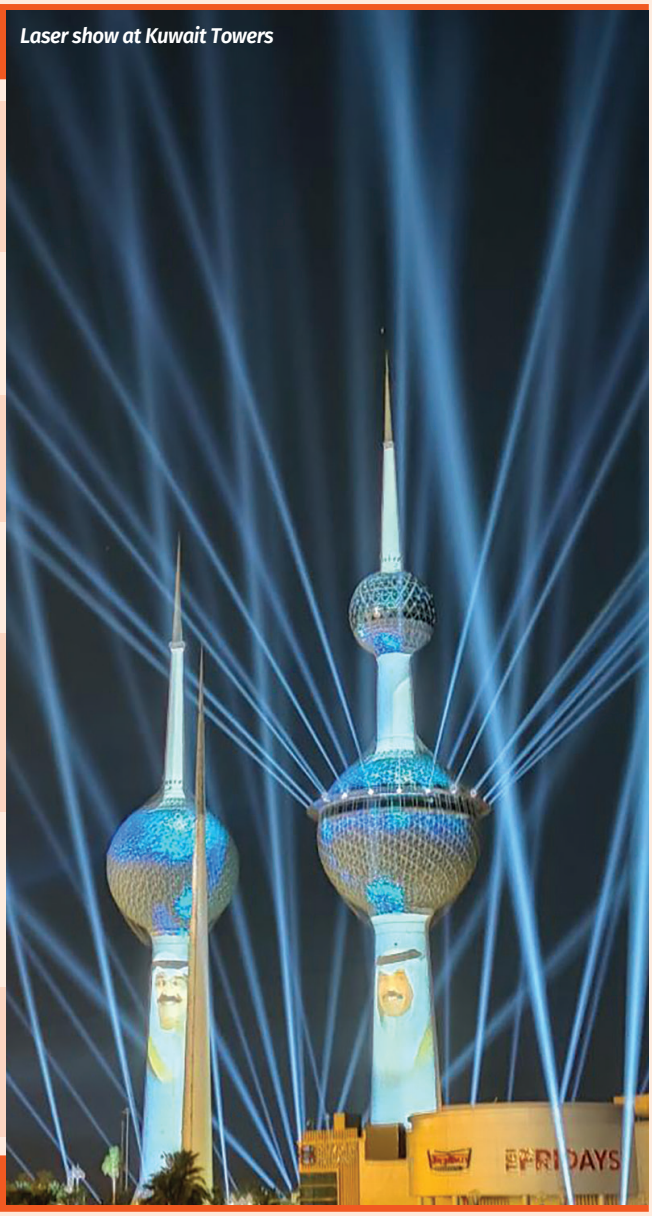
Public Administration:
Reform administrative and bureaucratic systems to enhance government effectiveness and transparency.

Quality of Life:
Ensure sustainable living conditions through environmental conservation and urban development projects.

Healthcare:
Improve healthcare services by expanding facilities, adopting advanced medical technologies and increasing the number of hospital beds per 1,000 people to 3.5 by 2035, up from the current 2.5.

Human Capital:
Invest in education and training to increase the higher education enrolment rate to 40% by 2035, versus the current 30%, thereby building a skilled and competitive workforce.

Global Positioning:
Enhance Kuwait's international position through active participation in the global community and adherence to international standards.



Laser show at Kuwait Towers

Kuwait Tourism Sector

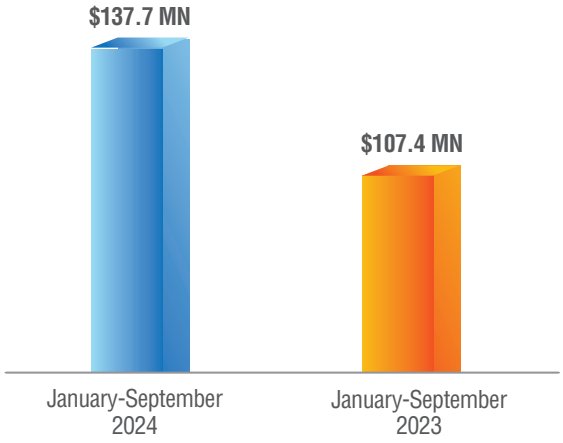
Visitor spend saw an annual increase of 28.2%, amounting to an additional $30.30 million during the first nine months of 2024 versus the corresponding period in 2023, indicated the Central Bank of Kuwait.

Government efforts to facilitate the entry of visitors and the development of the country's tourism infrastructure, including hotels, restaurants, shopping malls and leisure & entertainment facilities spurred tourist spending. Moreover, the organisation of events and festivals has also played a crucial role in attracting more visitors and boosting their spending.

Kuwaiti citizens' spending on tourism and travel, on the other hand, saw a decline during the first nine months of 2024, totalling $810 million compared to $960 million during the same period in 2023, representing a 15.8% decline. This reduction is largely attributed to changes in seasonal travel patterns, as cooler winter temperatures in Kuwait encouraged more citizens to stay within the country, reducing the demand for international travel and boosting interest in local entertainment options. This presents a unique opportunity for Kuwait to develop its leisure, entertainment and recreational landscape to not only encourage its citizens and residents to spend within the country but also attract visitors from neighbouring countries and beyond, eventually.

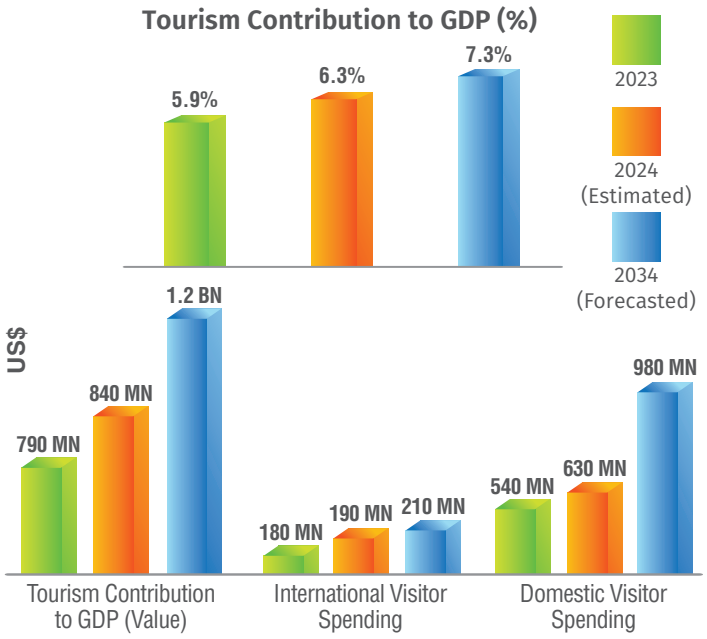
According to the Kuwait Direct Investment Promotion Authority (KDIPA), the country's revenues from travel and tourism are expected to rise from $522 million in 2021 to $1.13 billion by 2025 increasing at a compound annual growth rate (CAGR) of 21.34% during this period. This will boost the demand for entertainment options in the country.

Total Visitor Spending



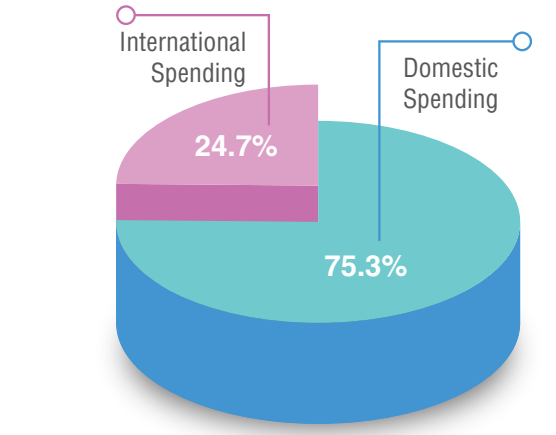
Source: Central Bank of Kuwait

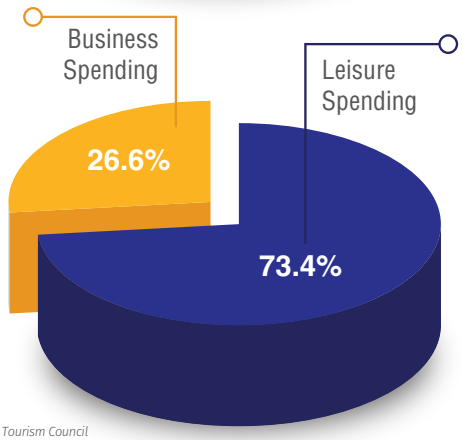
Tourism Contribution to GDP (%)



Sources: World Travel & Tourism Council

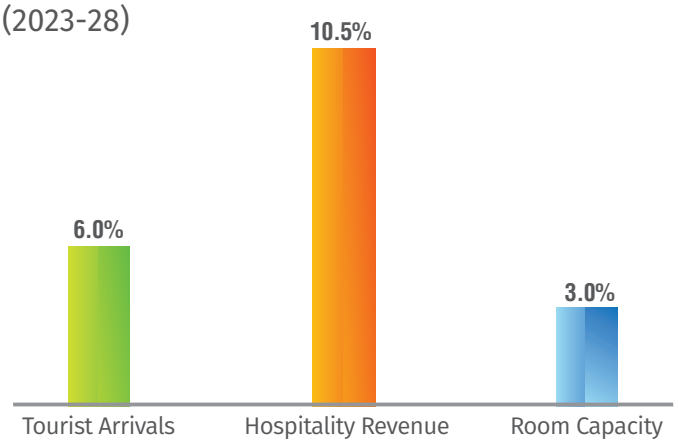
Percentage Share of Total Spending (2023)



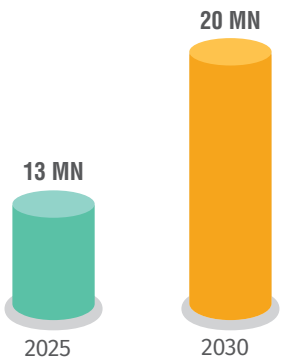


Sources: World Travel & Tourism Council

Kuwait Tourism & Hospitality Market Growth (2023-28)



Capacity Increase at Kuwait International Airport



Source: Alpen Capital

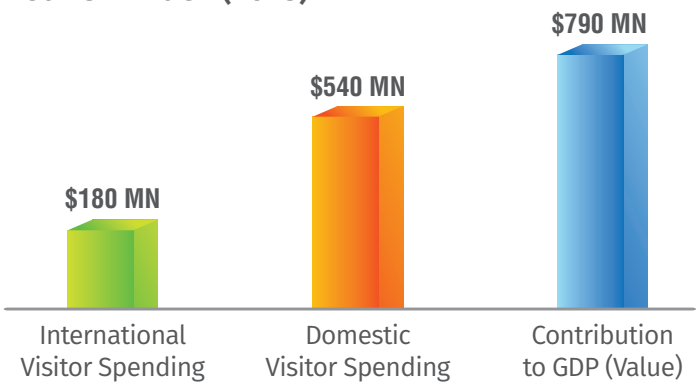
Overall, Kuwait has made significant strides towards its development goals by committing to a series of investments and launching new destinations. In 2016, the Sheikh Jaber Al-Ahmed Cultural Centre, also known as the Kuwait Opera House, was inaugurated after two years of construction at a cost of $775 million. In 2021, the Kuwait Investment Authority (KIA) approved a capital increase of $830.6 million for the country's Touristic Enterprises Company (TEC) towards redevelopment plans for 11 key facilities across five segments: parks and family entertainment, hospitality, recreational clubs, highway rest areas and waterfront marinas. TEC also aims to redevelop three major projects, including Nuwaiseeb Rest Area, Ras Al Ardh Club and Messilah Beach, alongside upgrading several seafront facilities in Kuwait Bay. In 2022, Winter Wonderland, an entertainment venue featuring over 37 rides and games, was completed in just two months. It welcomed more than 100,000 visitors within seven weeks and reopened for a second season in October 2023. Additionally, Green Island launched its second season in February 2023, offering carnival games, retail shops and dining options. Moreover, KIA is also developing a new Entertainment City that's expected to attract over 900,000 visitors annually by 2030.

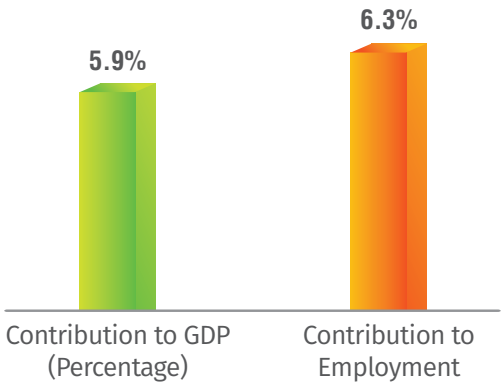
Inbound Arrivals (2023)

Saudi Arabia	31%
India	19%
Egypt	13%
Syria	5%
Pakistan	5%
Rest of the World	27%

Sources: Oxford Economics, UN Tourism

Tourism Index (2023)





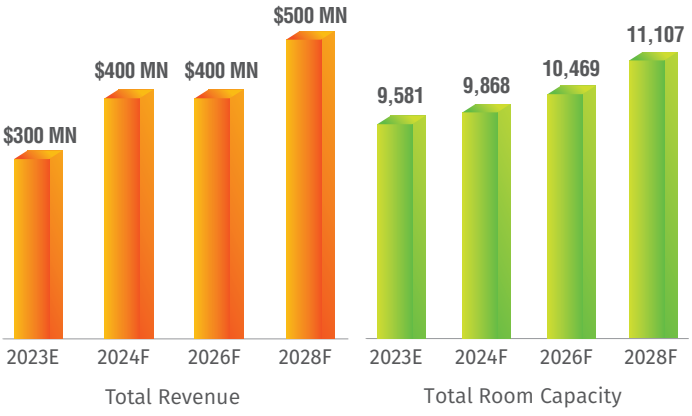
Sources: World Travel & Tourism Council, WEF Travel and Tourism Development Index

Ranking in the World Travel and Tourism Development Index **96**



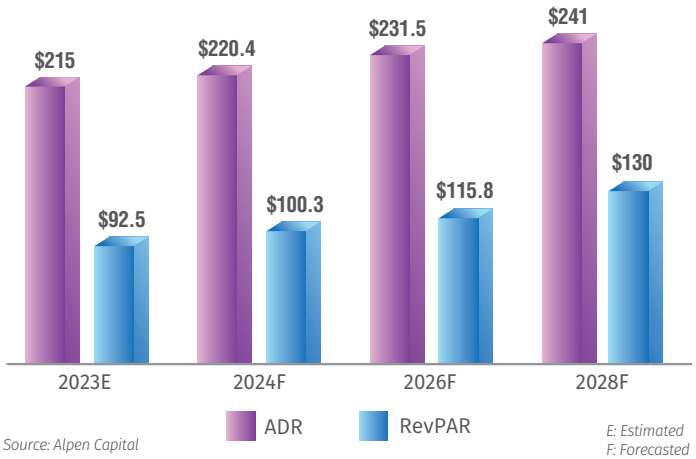
Madinat Al-Hareer (Silk City)

Kuwait Hospitality Market Forecast



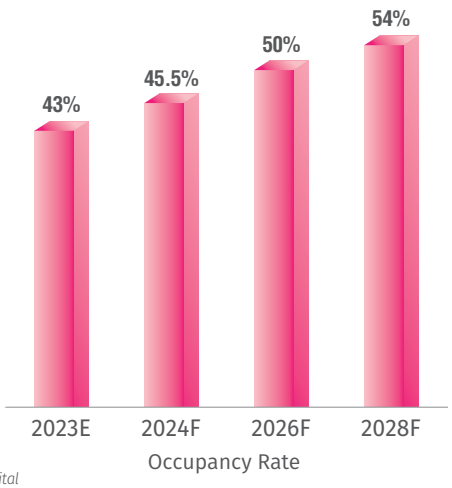
Source: Alpen Capital

E: Estimated
F: Forecasted



Source: Alpen Capital

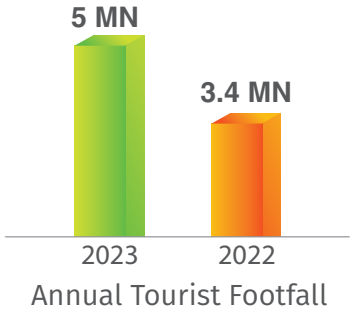
E: Estimated
F: Forecasted



Source: Alpen Capital

E: Estimated
F: Forecasted

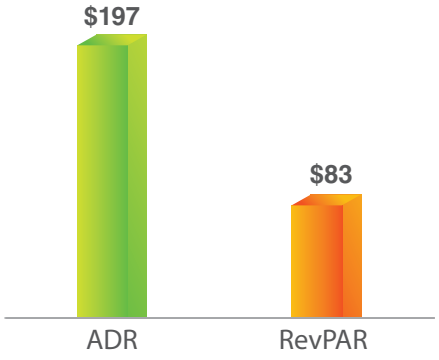
Growth in Tourist Footfall



Growth in International Tourism Receipts (2024) **+232%**

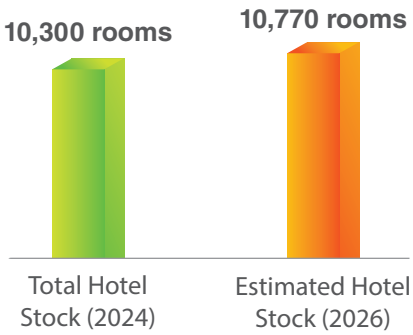
Sources: Knight Frank & UN Tourism

Kuwait Hotel Sector Performance (Jan-May 2024)



Growth in Average Occupancy Levels (2024) **42%**

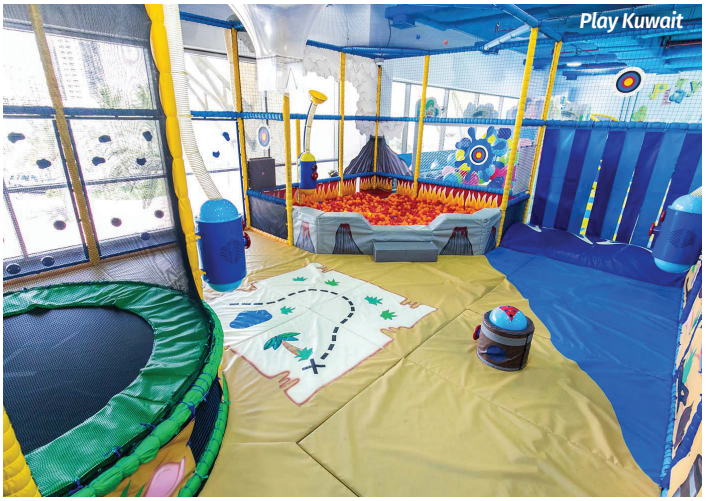
Source: Knight Frank



Source: Knight Frank

Kuwait Leisure & Entertainment Industry

Kuwait's leisure & entertainment sector is experiencing notable growth, propelled by strategic investments and a surge in tourism. The cinema industry is also on an upward trajectory. For example, the Kuwait National Cinema Company reported a 27% rise in operating revenue in 2024. These developments reflect Kuwait's commitment to enriching its cultural landscape and providing diverse entertainment options for residents and tourists alike.



Key Leisure & Entertainment Operators (MENALAC Members in bold)

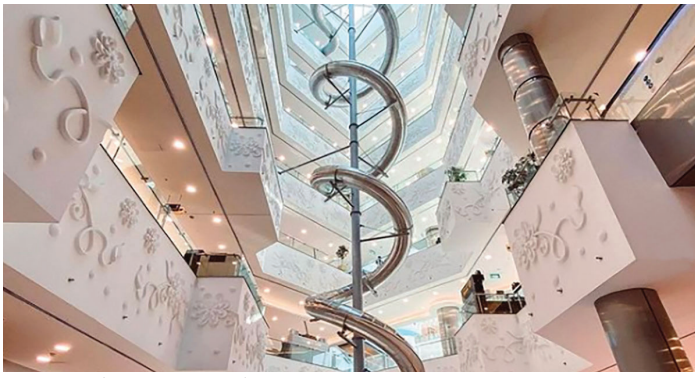
- Adventure Zone
- Below Zero Skating
- Cartoon Network World
- **Chuck E Cheese**
- Cozmo Entertainment
- eJoy Kids Entertainment Center
- Euphoria Entertainment
- **Fun City**
- **Fun Tiki 360**
- FunQuest
- **Fun Zone Park**
- **Future Kid Entertainment & Real Estate Company**
- **KidZania**
- Kuwait Magic Park
- **Magic Planet The Avenues Mall**
- Mindmaze Kuwait
- Nomad Entertainment & Karting
- **Play Enterprises/Play**
- Pokiddo® Entertainment Play Park - Kuwait
- ProKart Kuwait
- **Sky Zone Al Asima**
- Slayil Al Jahra Park (The 99 Village)
- **TEKZONE**
- The Scientific Center
- **Trampo Extreme**
- VENUE 56
- VR Mania



VENUE 56

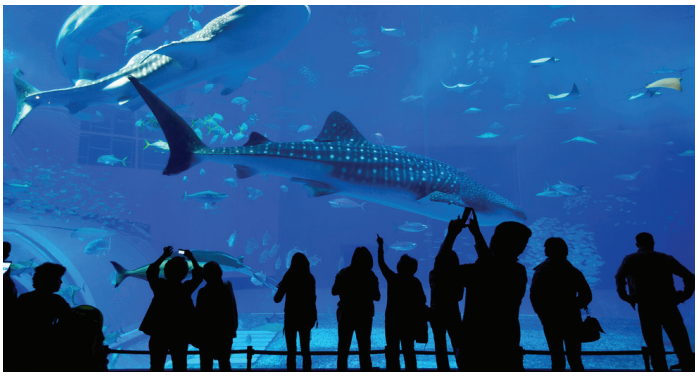


Funquest, Kuwait


Loopz, Kuwait (Longest Indoor Slide)


Nomad Entertainment


Souq Al-Mubarakiya


The Aquarium – The Scientific Center


Cartoon Network World


Al Salam Palace Museum



KidZania, The Avenues Mall



Sky Zone, Al Asima



Fun City, Al Salam Mall



Magic Planet, The Avenues Mall



Fun Zone Park, The Avenues Mall



Play Enterprises, Hawally



TEKZONE



Trampo Extreme, Murouj



Chuck E Cheese



Fun Tiki 360



Cozmo, Jahra



Gamzland Entertainment, Homz Mall



Winter Wonderland



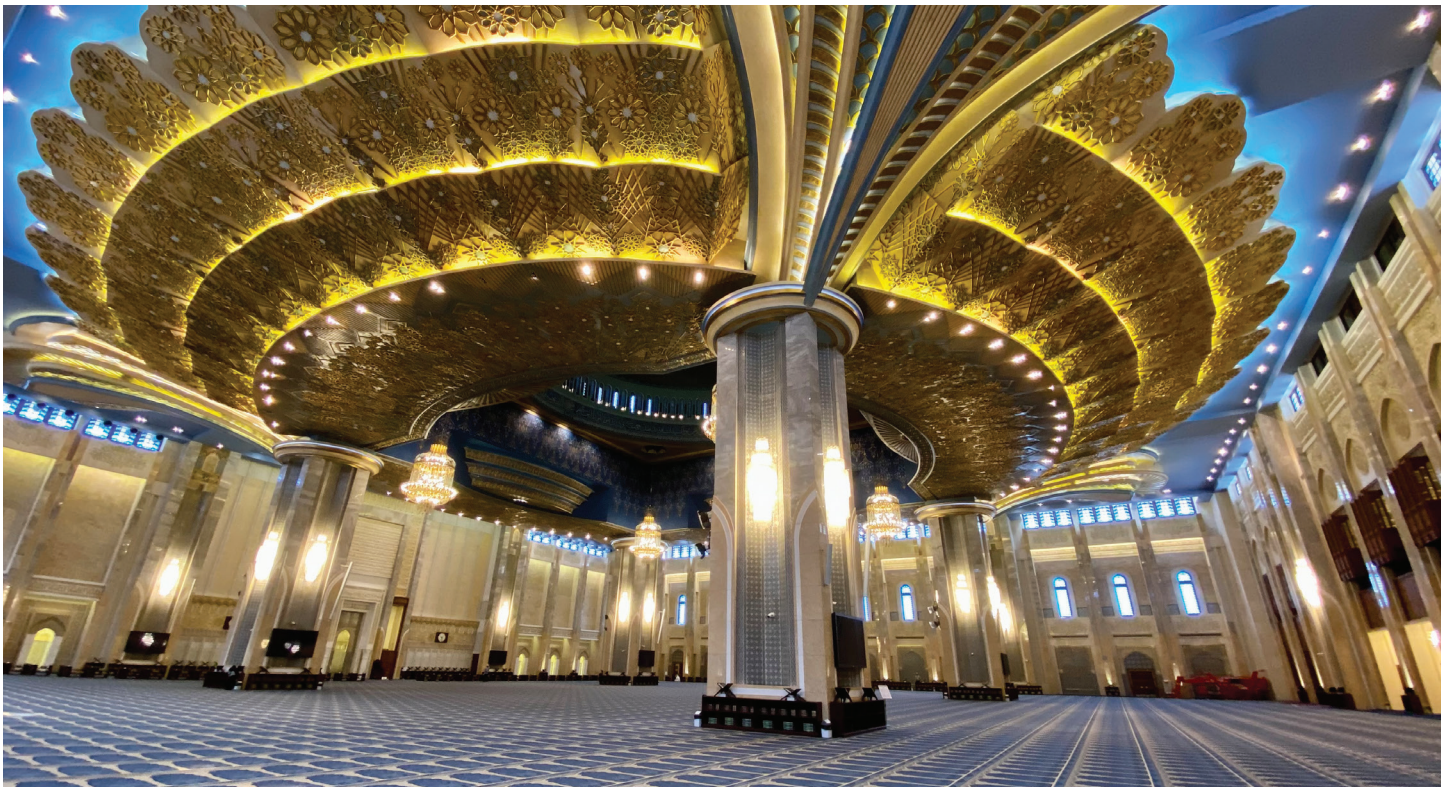
ProKart Kuwait



Pokiddo® Entertainment Play Park



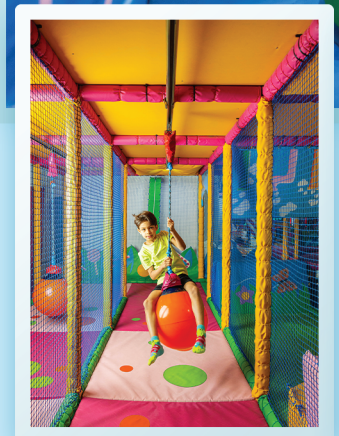
Below Zero Skating



Kuwait Grand Mosque

Play is Kuwait's leading chain of indoor playgrounds and family entertainment centers, dedicated to providing clean, safe, and high-quality play areas for children. Established in 2009, Play was founded with the vision of creating exceptional and fun-filled spaces for kids. Initially focusing on state-of-the-art soft play areas for toddlers and young children, Play quickly gained the trust of families, leading to the expansion of four additional locations.











www.playkuwait.com

Playkuwait

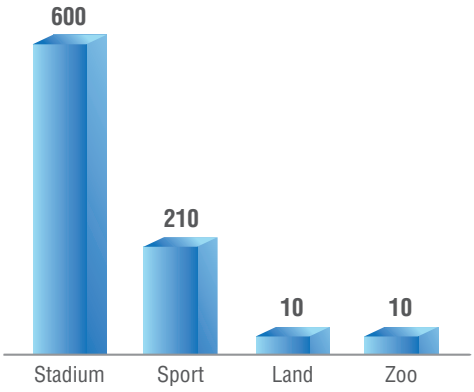
Boulevard - Promenade - Assima - Jahra mall

Upcoming Mega Projects at a Glance

The Kuwait government has prioritised tourism development through its Kuwait Vision 2035, focusing on infrastructure expansion, entertainment projects and cultural attractions. The hospitality sector has witnessed steady growth with new luxury hotels and resorts catering to both business and leisure travellers. Malls such as The Avenues, 360 Mall and Marina Mall serve as major retail and entertainment hubs, drawing regional visitors. Additionally, investments in theme parks, cinemas and family entertainment centres aim to enhance Kuwait's appeal. With ongoing projects such as Madinat Al Hareer (Silk City) and the expansion of Kuwait International Airport, the country aims to boost visitor numbers and economic diversification.

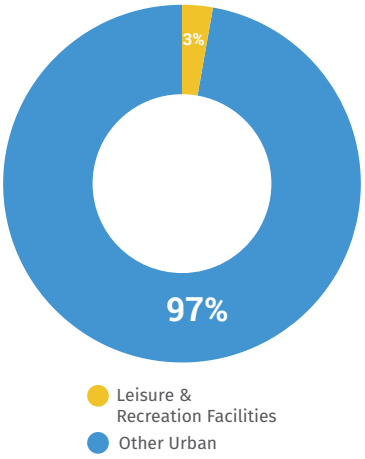
Kuwait's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

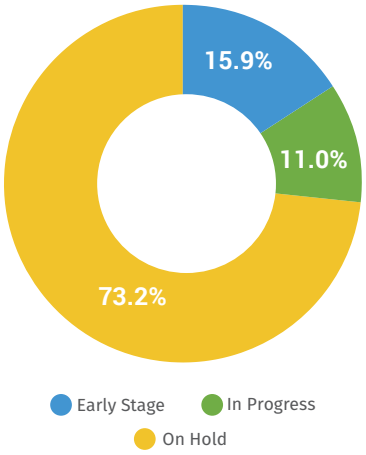


Source: BNC

Contribution of Leisure & Recreation Industry to Kuwait's Urban Sector



Stage-wise Distribution



Silk City (Madinat Al Hareer)

Value: USD 132 billion
Stage: Under Development
Developers: Tamdeen Group and Ajiyal Real Estate & Entertainment Co
Description: A 250 sq km mega, master-planned, mixed-use city with residential, commercial, retail, hospitality and tourism facilities that will change the face of the leisure industry in Kuwait and bring more visitors to the country in the coming years. To be located in Subiya area, the project will have four distinct quarters – Finance City, Leisure City, Ecological City and Residential City – each with its own city centre. Leisure & entertainment industry suppliers and manufacturers stand to greatly benefit from the Silk City project.
Completion: NA



New Entertainment City

Value: USD 655 million
Stage: Under Development
Developers: Kuwait Investment Authority (KIA)
Description: The 2,650 million square metres (sqm) mixed-use development with amusement parks will provide business opportunities for manufacturers, suppliers, contractors and sub-contractors in the leisure and entertainment industry, while also creating significant job opportunities.
Completion: NA

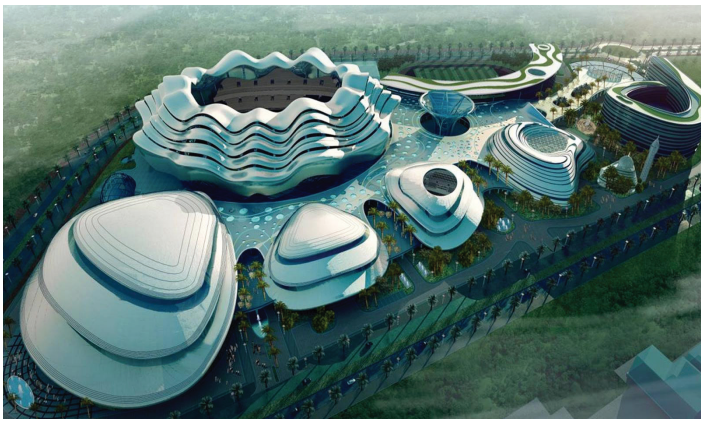


Sabah Al Ahmad City



Value: USD 5 billion
Stage: Under Development
Developers: La'ala Al Kuwait Real Estate Company
Description: The leisure and recreational components within the 61.5 sq km mixed-use project will not only help residents, but also visitors to avail the leisure facilities. The new entertainment facilities provide a great opportunity for leisure operators, contractors and suppliers.
Completion: NA

Olympic Village Project at Jaber Al Ahmad City



Value: USD 1 billion
Stage: Under Construction
Developers: Public Authority for Housing Welfare (PAHW)
Description: The Kuwait Olympic Village development comprises a Stadium (25,000 seats), Team Games Hall, Individual Games Hall, Racquet Games Hall, Swimming Complex, Training Field & Track, International Zone, Athletes Residential Block, Mosque, Olympic Flame Tower, Concourse and Existing Substation. The project is being built across a land area of 213,600 sqm.
Completion: NA

Bubiyan, Warba Failaka, Maskan & Aouha Islands



Value: USD 30 million
Stage: Under Planning & Development
Developers: Ministry of Public Works
Description: This mega master-planned mixed-use island development will have tourism and entertainment facilities. These projects will strengthen Kuwait's leisure tourism appeal to foreign tourists and will help the country attract more family tourists and adventure seekers. These islands also offer great opportunities for manufacturers and suppliers to the amusement parks.
Completion: NA

Al Assima (Capital) Tower



Value: USD 310 million
Stage: Under Construction
Developers: Al Saliha Real Estate Co.
Description: The hotel, retail, office complex with residential facilities is a major project that is currently at the tendering stage. Once complete, it will add to Kuwait City's growing skyline.
Completion: NA

New Kuwait International Airport

Value: USD 4.3 billion
Stage: Under Construction
Developers: Kuwait Government
Description: The new airport terminal, car parks and associated facilities will go a long way in attracting foreign tourists to Kuwait. The new state-of-the-art terminal is being constructed in three phases. While the first phase will add a capacity of 13 million passengers a year, the subsequent phases will enhance the capacity to between 25 million and 50 million passengers a year.
Completion: NA



Warba Island Development

Value: NA
Stage: NA
Developers: Public Authority of Sport
Description: Warba Island development will offer a mix of hospitality, entertainment and recreational facilities, making it a vital part of Kuwait's strategy to diversify its economy through tourism.
Completion: NA



Al Jahra Waterfront

Value: USD 1.6 billion
Stage: Design
Developers: Kuwait Municipality
Description: The project involves the development of 7.3-km-long Jahra Corniche. The project will be located between the West of Doha Station to the borders of Jahra Natural Reserve and aimed at creating a balance between the environment on one side and establishing touristic and commercial facilities on the other. The project covering an area of approximately 5.8 million sqm. The council explained that the project is expected to create around 25,000 job opportunities, representing a significant advancement in line with Kuwait's vision for (New Kuwait 2035). The project will be offered to the private sector in accordance with the relevant laws and procedures.
Completion: Q4 2031



Aventura Mall

Value: USD 352.8 million
Stage: Under construction
Developers: National Industries Group, Al Mabanee Real Estate Company, Privatization Holding Company
Description: Aventura Mall is set to become a premier entertainment and commercial destination, enhancing Kuwait's shopping landscape. Spanning a built-up area of 300,000 sqm with a total leasable area of 108,200 sqm, the development features a first and second basement floor, ground floor, mezzanine and first floor. Designed to international standards, Aventura Mall will serve as a modern landmark in Jaber Al-Ahmad City, attracting visitors from across Kuwait. It will house a diverse range of retail stores, international brands, restaurants and cafes, offering a unique shopping and entertainment experience.
Completion: Q2 2026



Mubarak Al Kabeer Port – Bubiyan Island



Value: Total estimated cost of $5 billion, with KD 186 million allocated for the fiscal year 2024–2025
Stage: Ongoing
Contractors: Collaborative efforts between Kuwaiti authorities and Chinese partners, including China Communications Construction Company
Description: The port is a pivotal component of Kuwait's Vision 2035 and China's Belt and Road Initiative, aiming to establish a world-class logistics and trade hub. The port also includes a sprawling industrial zone, tourism facilities, car parks, roads, houses and commercial offices, the project would allow Kuwait to attract massive investments and bolster its economy and trade.
Completion: End of 2026

Assima Mall Phase 2 Expansion – Kuwait City



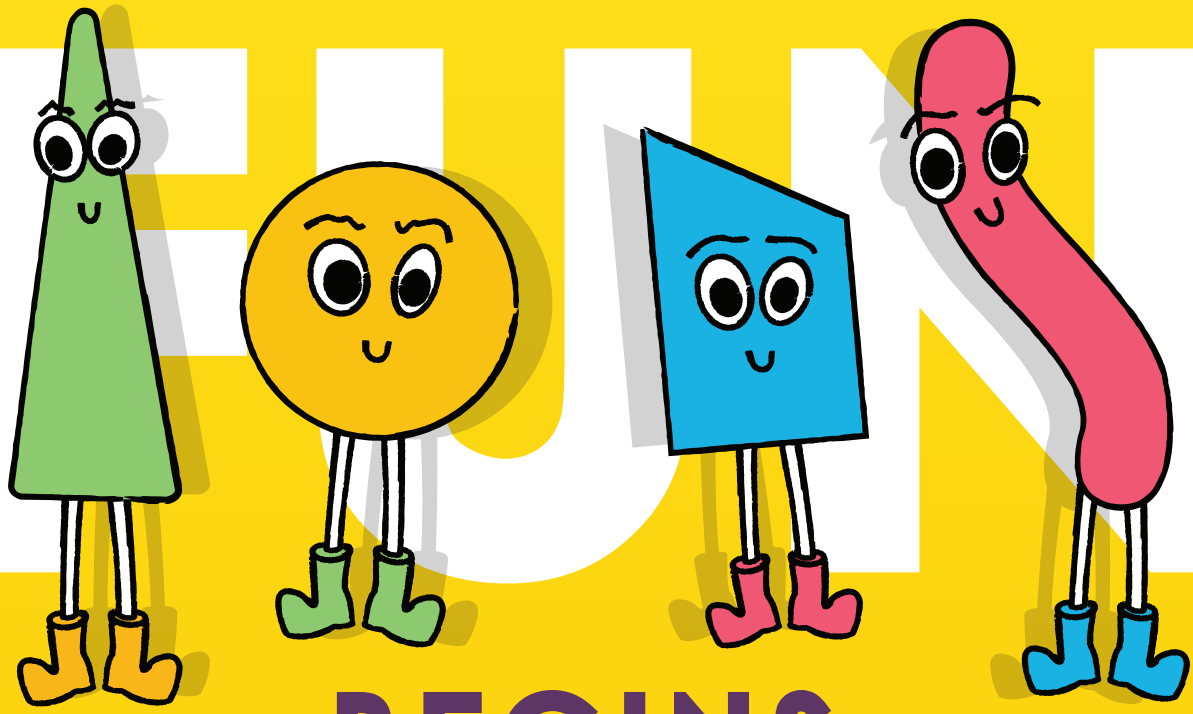
Value: USD 713 million
Stage: Phase 2 is under construction, with approximately 50% completed as of March 2025
Developers: Salhia Real Estate Company
Description: The expansion includes a 30-story tower featuring 14,000 square metre of premium commercial office space and 124 high-quality residential apartments, enhancing the mixed-use offerings of the Assima development.
Completion: Expected by mid-2026



Dazzling fireworks, Kuwait City

FUN ZONE PARK

WHERE ALL THE FUN BEGINS



Experience the thrill of adventure at Fun Zone Park - Kuwait, where every twist and turn invites you to unleash your inner child!







SCAN ME!

VISIT US

The Avenues Mall | Marina Mall
Boulevard Mall | Hateen Coop



View from Al Amirat Heights overlooking Muscat



SULTANATE OF OMAN

Oman holds strategic importance due to its location playing a significant role in maritime trade routes. Neutrality in regional politics, robust logistics hubs and rich natural resources enhance its geopolitical and economic significance.

Geography & Historical Background

Situated at the confluence of the Gulf and Arabian Sea, Oman occupies a strategically important location for trade and logistics. It is bordered by the UAE to the northwest, Saudi Arabia to the west, Yemen to the southwest, Arabian Sea to the south and east and Gulf of Oman to the northeast. The country's coastline stretches over 3,000 kilometres, making it a vital maritime nation. Oman has a rich history tied to Indian Ocean trade, with the Muscat sultanate establishing friendship treaties with Britain in the late 18th century. While relying on British advisors, Oman retained its independence. The Late His Majesty Sultan Qaboos bin Said, who ruled Oman for five decades, modernised the nation, fostering ties with the UK and the US while maintaining neutrality in foreign policy.

Inspired by the 2011 Arab Spring, Oman saw protests demanding reforms, leading Sultan Qaboos bin Said to introduce political and economic changes, such as empowering the legislative body, initiating direct elections for its lower house and creating national job programmes. Decentralisation efforts culminated in the country's first municipal elections in 2012. His Majesty Sultan Haitham bin Tariq Al Said, the current ruler of Oman continues to lead the country with a focus on preserving stability and advancing development.

Population

According to the World Population Review, Oman's population stood at 5.37 million in 2024, up from approximately 5 million the previous year and is projected to reach 5.89 million by 2030. The country's median age is 25.6 years, with a total life expectancy of 75.7 years.

According to the International Monetary Fund (IMF), Oman's employment expanded by 6.7% in 2023, and continued to grow during the first half of 2024, led by private sector jobs with balanced contributions from Omani and expatriate workers. Employment for Omani women grew by 8.2% versus 6.9% in 2022. Importantly, the National Strategy for the Advancement of Omani Women aims to further support women in the workforce by promoting education, skill and career development, coupled with initiatives to support women entrepreneurs and business owners.

Oman ranked 59th globally in the Human Development Index (2022) categorised as "High Human Development" by the United Nations Development Programme (UNDP).



Oman at a Glance

Official Name	Sultanate of Oman
Land Area	309,500 square kilometres (sq km)
Capital	Muscat
Government	Absolute Monarchy
Emir	His Majesty Sultan Haitham bin Tariq Al Said
Population (2024)	5.4 Million
Population Density	17.06 per sq km
Population Growth	2.84%
Nationality Split	56.7% Omanis and 43.3% Expatriates
GDP (2023)	$108.8 Billion
GDP Per Capita (2023)	$21,550
GDP Growth (2023)	1.3%
Inflation – Consumer Prices (2023)	1.0%
Industries	Agriculture & fisheries, construction, education, financial services, healthcare, logistics & infrastructure, manufacturing, mining, oil & gas, real estate, renewable energy, retail, tourism
National Day	November 18
Official Language	Arabic
Dominant Religion	Islam
Currency	Omani Rial
Time Zone	Arabian Standard Time (GMT+4)
Calling Code	+968

Sources: World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	426,900	217,500	209,400
5 – 9	478,900	244,100	234,800
10 – 14	399,600	203,500	196,100
15 – 19	297,300	151,900	145,400
20 – 24	419,200	271,300	147,900
25 – 29	558,700	384,900	173,800
30 – 34	653,900	454,000	199,900
35 – 39	660,000	463,500	196,500
40 – 44	497,800	341,700	156,100
45 – 49	327,300	216,400	110,900
50 – 54	205,500	137,900	67,600
55 – 59	129,100	82,300	46,800
60 – 64	88,000	49,700	38,300
65 – 69	53,100	26,600	26,500
70 – 74	37,100	18,100	19,000
75 – 79	24,900	11,900	13,000
80+	24,519	10,718	13,801

Source: World Population Review

Population Per City (2025)



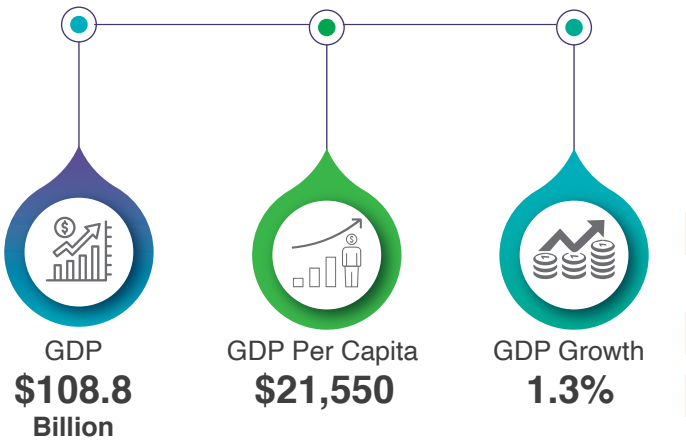
Source: World Population Review

Economy

According to the World Bank's Spring 2024 Gulf Economic Update, Oman's economic outlook remains "favourable," facilitated by increased gas production and diversification efforts to further improve the business environment, support the growth of SMEs and accelerate investments in renewable energy and green hydrogen. The report stated that inflation is forecast to converge to 2% over the medium term, while growth is expected to further accelerate supported by global demand recovery, increased investments in non-hydrocarbon and renewable energy.

Overall, according to the World Bank, additional fiscal and diversification measures, accelerating production at the Duqm refinery project and increased foreign direct investments (FDI) from regional partners are expected to catalyse growth and strengthen fiscal position. On the other hand, volatility of oil prices, geopolitical risks, supply chain disruptions and global energy transition could pose potential challenges for the economy.

State of Economy Highlights (2023)



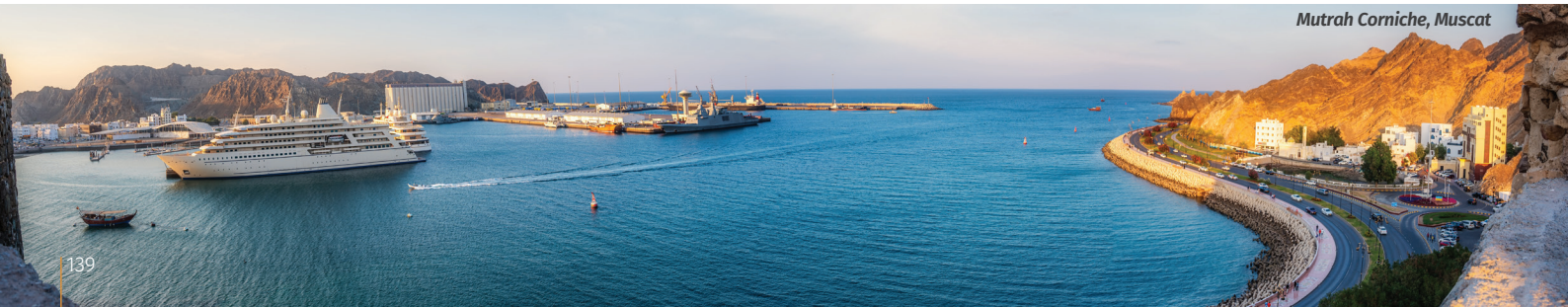
GDP Projections

Indicators	2024 (Estimated)	2025 (Projected)	2026 (Forecasted)
Real GDP Growth	0.7%	2.7%	3.2%
Growth in Exports	0.7%	3.3%	3%
Growth in Imports	3.3%	3.7%	3.3%
CPI Inflation (average)	1.0%	1.4%	1.6%

Source: World Bank

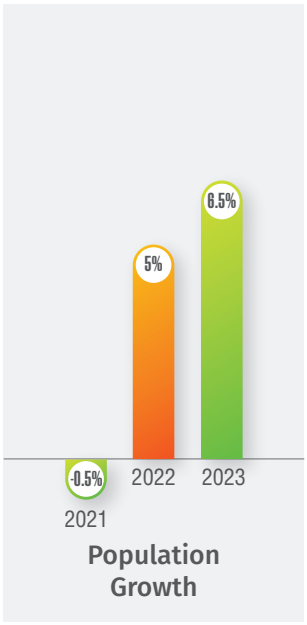


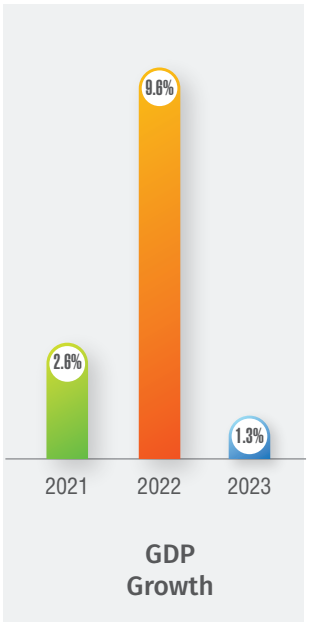
Sources: World Bank & CIA The World Factbook

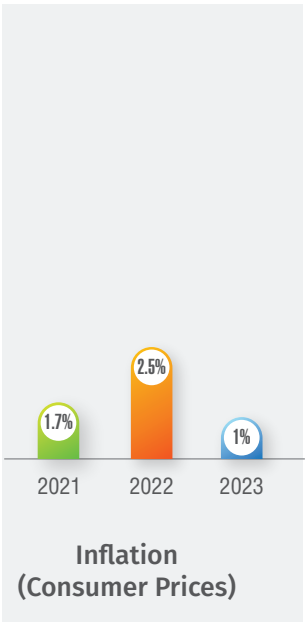


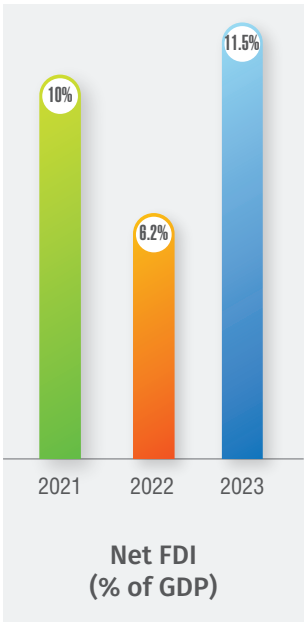
Mutrah Corniche, Muscat

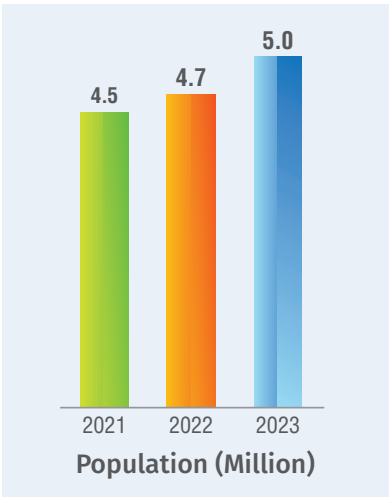
Key Macroeconomic Highlights







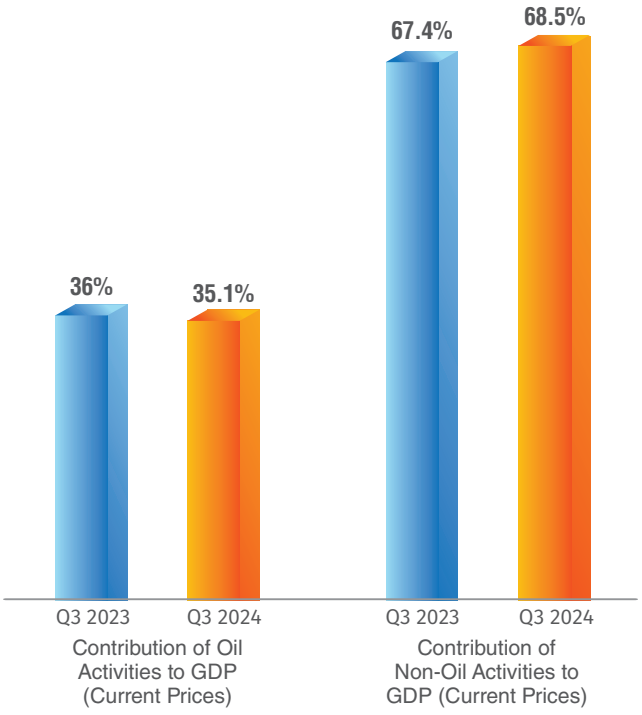






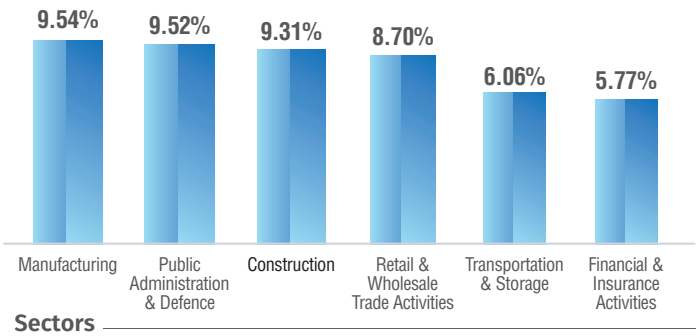


Sources: World Bank

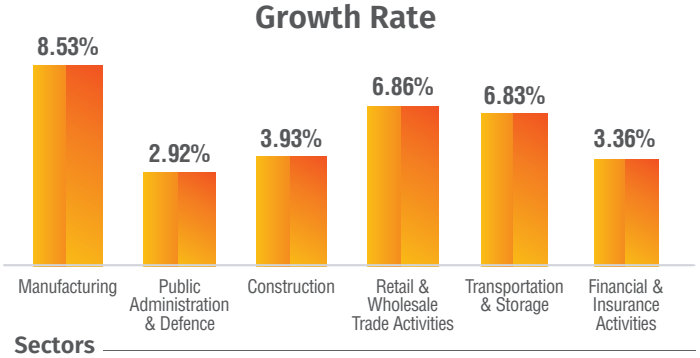


Source: Ministry of Economy, Oman Economic Performance Bulletin, December 2024

Contribution to GDP



Growth Rate



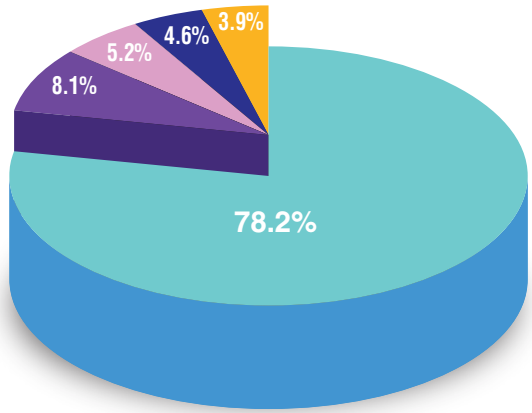
Source: Ministry of Economy, Oman Economic Performance Bulletin, December 2024

Investment

Oman's FDI stood at $67.5 billion at the end of the second quarter of 2024 versus $57.5 billion during the same period in 2023, thereby recording a 17.40% growth, indicated the Oman Economic Performance Bulletin (December 2024) by the Ministry of Economy.

Overall, according to IMF, the country's favourable environment has boosted investor confidence leading to a rise in inward FDI over the past three years, thereby also paving the way for more non-oil sector investments.

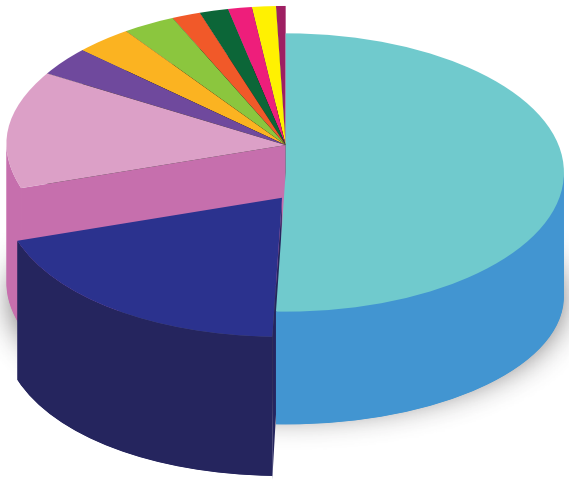
FDI by Activity (End of Q2 2024)



Sectors

- Oil & Gas Exploration
- Manufacturing Activities
- Financial Intermediation
- Real Estate Activities
- Other

FDI by Source Country (End of Q2 2024)



Percentage	Country
50.7%	UK
19.5%	USA
3.3%	UAE
3.2%	Kuwait
3.1%	China
1.8%	Qatar
1.5%	India
1.5%	Bahrain
1.2%	Netherlands
0.5%	Switzerland
13.7%	Others

Source: Ministry of Economy, Oman Economic Performance Bulletin, December 2024



Wadi Darbat, Salalah, Oman



Oman Vision 2040

Aerial view of Bandar Al Khairan, Oman

Oman Vision 2040 is the country's long-term strategic plan aimed at achieving sustainable development, economic diversification and societal wellbeing. Launched under the leadership of His Majesty Sultan Haitham bin Tariq, the Vision focuses on transforming Oman into a globally competitive economy while preserving its heritage and environment. By 2040, Oman aspires to be a prosperous, knowledge-based economy known for innovation, sustainability and human development.

Key Goals at a Glance

Economic Development

- Record 5% real GDP growth annually by 2040.
- Increase non-oil sector contributions to GDP to over 91.6% by 2040.
- Attract $50 billion in FDI by 2040.

Human Capital Development

- Modernise the education system, empower youth with entrepreneurship and skill development programmes.
- Aim to have 83% skilled labour in the private sector.
- Increase women's workforce participation to 40% in leadership roles.

Sustainability and Environment

- Transition to a green economy, targeting 35-39% renewable energy in the national energy mix by 2040.
- Rank among the top 20 countries in the Environmental Performance Index
- Implement sustainable water and resource management strategies.

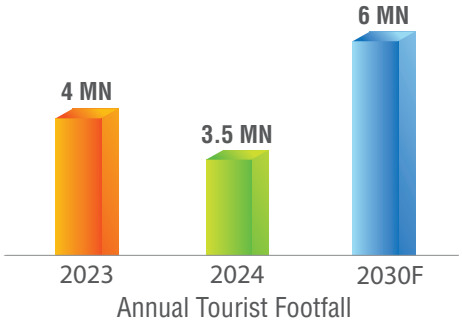


Sultan Qaboos Grand Mosque, Muscat

Oman Tourism Sector

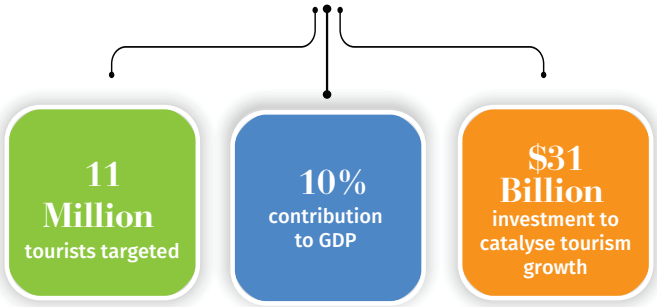
Tourism plays a pivotal role in Oman's economic diversification strategy under Vision 2040. Contributing 2.9% to GDP by 2019, the sector faced setbacks during the Covid-19 pandemic but rebounded strongly in 2022. With 21% of the $28.6 billion investment opportunities allocated to tourism, the government is expanding hotel capacity, attractions and transportation networks, focusing on integrated tourism to achieve Vision 2040 goals, stated Oxford Business Group in a report. The Oman government has put in motion several initiatives to attract tourists including the 'Visit Oman' campaign, which highlights the country's rich cultural heritage, as well as introducing e-visas.

Growth in Tourist Footfall



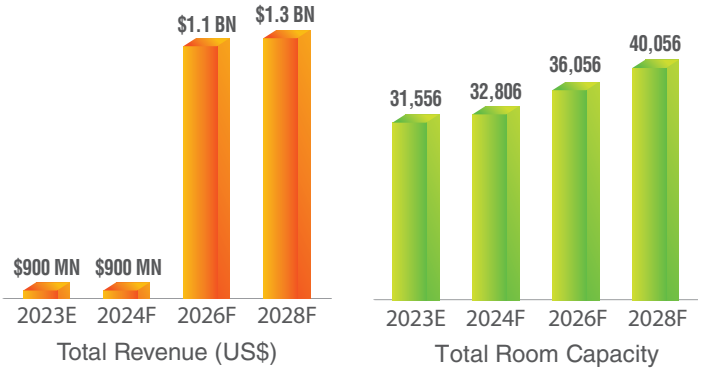
Sources: Ministry of Heritage & Tourism, Oman

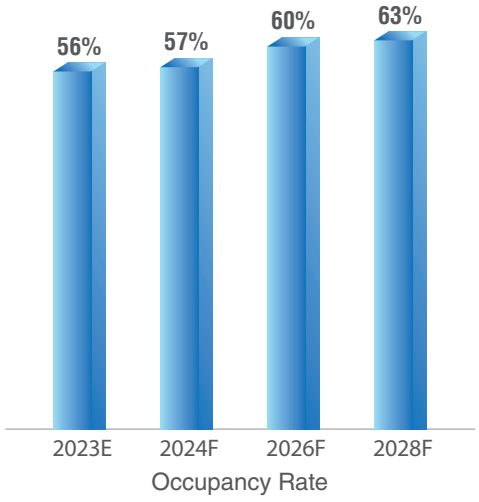
Forecasted Tourism Growth 2040

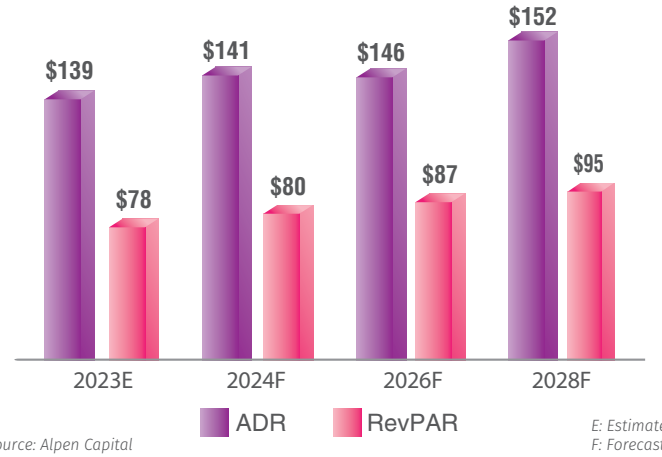


According to IMF, between 2005 and 2023, Omani tourism receipts increased five-fold, reaching $2.5 billion. However, while overall tourism receipts and arrivals have grown, they stem from relatively low bases and Oman continues to trail behind its regional peers in key tourism performance indicators. With approximately 40% of its visitors coming from GCC countries, Oman remains vulnerable to regional economic fluctuations - but this also presents a strategic opportunity to diversify and strengthen its international tourism base.

Oman Hospitality Market Forecast



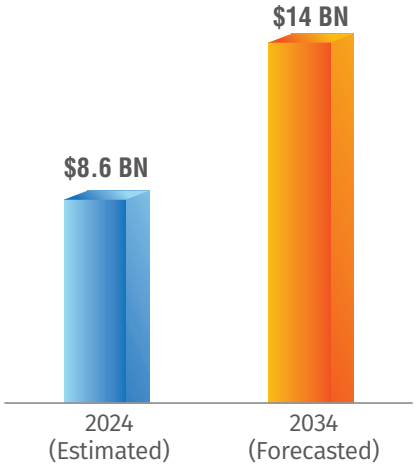




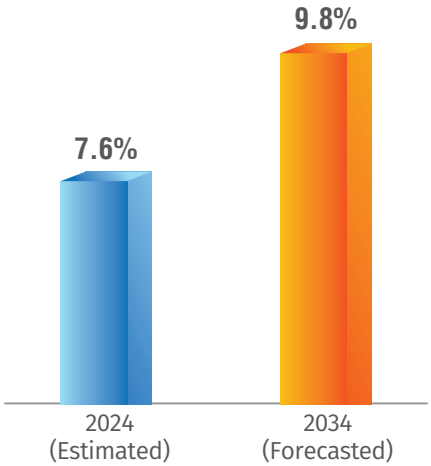
Source: Alpen Capital

E: Estimated
F: Forecasted

Tourism Contribution to GDP (Value)



Tourism Contribution to GDP (%)



Source: World Travel & Tourism Council

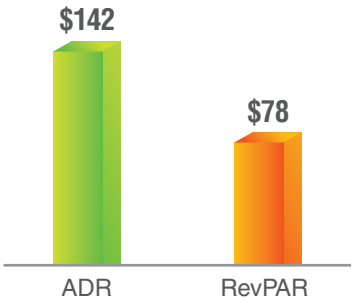
According to the World Travel & Tourism Council (WTTC), in 2023 the travel & tourism sector's contribution to Oman's GDP rose by almost 35%, reaching $7.3 billion. Domestic and international travellers spent $3.6 billion and $2.9 billion, respectively. The sector also created a 15% increase in employment opportunities.

As the country's tourism sector aims to attract 11.7 million international and domestic visitors annually by 2040, it promises to catalyse Oman's leisure and entertainment market, which is quite unique in nature.

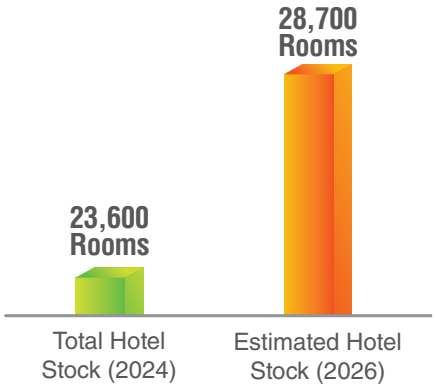
Owing to its rich cultural and historical heritage, Oman's iconic attractions include Nizwa Fort, Bahla Fort and Al Alam Palace, drawing both domestic and international tourists. While destinations such as Al Mouj Muscat and Muscat Bay offer an integrated experience to visitors combining leisure with retail. The family entertainment centre (FEC) and gaming offerings are also expanding.

In addition, due to its diverse topography, adventure and eco-tourism continue to thrive in Oman through activities including wadi bashing, mountain hiking in Jebel Akhdar and desert safaris in Wahiba Sands. Moreover, Oman's coastline offers water-based activities such as diving, snorkelling and dolphin watching, particularly around Musandam and Daymaniyat Islands. Cruise tourism remains popular too. Not to forget Oman's annual events – the Khareef Festival in Salalah and Muscat Festival – which attract thousands of visitors, showcasing local traditions, arts and cuisine.

Oman Hotel Sector Performance (Jan-May 2024)



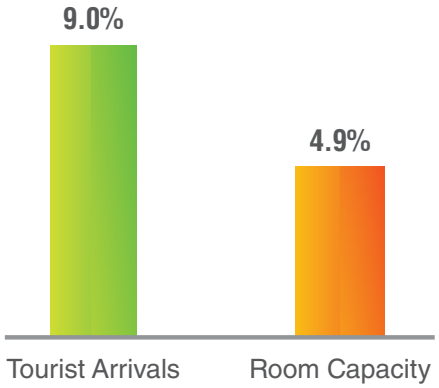
Growth in Average Occupancy Levels: 55%



Source: Knight Frank


Muscat International Airport opening

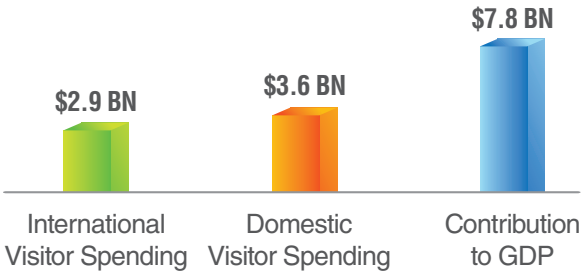
Oman Hospitality Market Growth (2023-28)



Source: Alpen Capital


Royal Opera House, Muscat

Tourism Index



Ranking in the World Travel and Tourism Development Index	67
Number of International Visitors	3.5 Million
Contribution to Employment	15%

Sources: World Travel & Tourism Council, WEF Travel and Tourism Development Index and BMI

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Oman Leisure & Entertainment Industry

Oman's leisure, entertainment and amusement sectors are undergoing significant transformation, driven by strategic investments and a commitment to diversifying the nation's tourism offerings. For instance, the Ministry of Heritage and Tourism has earmarked over $5.9 billion for more than 360 tourism projects, aiming to position Oman as a premier global tourist destination.

For example, spanning 1.5 million square metres (sqm) the Hayy Al Sharq project in Barka is being developed as an integrated theme park that will feature an amusement park, edutainment centres, dining options, hotels and residential areas. Additionally, the Ministry of Housing and Urban Planning has announced three major leisure destinations including Rimal Park, Rathath Boulevard and Aames Bay Development, set to open over the next five years. The Rathath Boulevard project, specifically, in Salalah's Itin area aims to enhance sustainable tourism, commerce and entertainment across its 470,000 sqm space.

Overall, with a focus on integrating natural beauty with entertainment and modern amenities, Oman is set to offer a unique blend of cultural heritage and contemporary leisure experiences, catering to both domestic and international tourists.

Key Leisure & Entertainment Operators (MENALAC Members in bold)

- Bows And Arrows
- Dhofar Bowling Center
- **Fabyland - Muscat Grand Mall**
- **Fun City - Oasis Mall**
- FunVR
- **FunZone**
- Funtazmo
- Funtazmo Kids
- **Ground Control Social**
- Happy Fun
- Hawana Aqua Park
- Integrated Animal Theme Park
- **Magic Planet**
- Marahland City of Joy
- Oman Automobile Association
- Planet Game Park Oman
- Qurum Natural Park
- Sindbad Amusement Park
- **Snow Park Oman**
- Super Nova Play Center
- **Trampo Extreme**
- Venom
- VR Zone
- **Wadina Water Park**
- Xcape Muscat



dusitD2 Naseem Resort, Jabal Akhdar



Khasab Musandam



Salalah



Royal Opera House Muscat



Daymaniyat Islands Nature Reserve



City Centre Muscat



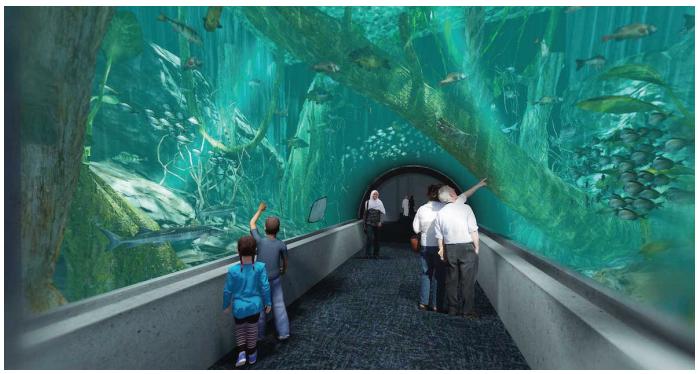
Ground Control Social, Muscat



Wadina Water Park



Hawana Aqua Park



Palm Mall Muscat Aquarium



Snow Park Oman



Fabyland - Muscat Grand Mall



Magic Planet



Trampo Extreme



Fun City - Oasis Mall



FunZone

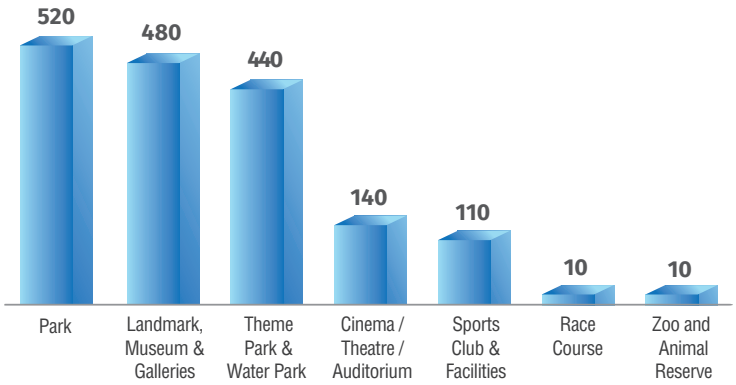
Upcoming Mega Projects at a Glance

Oman is recognised as one of the fastest-growing tourism destinations in the Middle East, attracting visitors with its diverse environments and cultural heritage. The Oman Tourism Development Company (OMRAN), established in 2005, leads major tourism, heritage and urban developments. Notable projects include the Oman Convention and Exhibition Centre, Al Irfan Urban Development and the W Hotel in Muscat's Shatti Al Qurum District. These initiatives enhance the hospitality infrastructure, catering to both business and leisure travellers.

Ecotourism is also a growing segment, with sites such as Ras al-Jinz, known for the nesting of endangered turtle species, attracting nature enthusiasts. Collectively, these sectors contribute to job creation, infrastructure development and foreign investments, positioning Oman as a competitive destination in the global tourism market and bolstering its economy for the future.

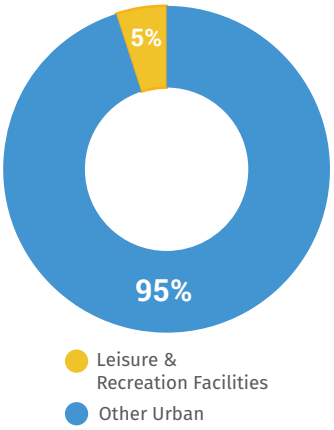
Oman's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

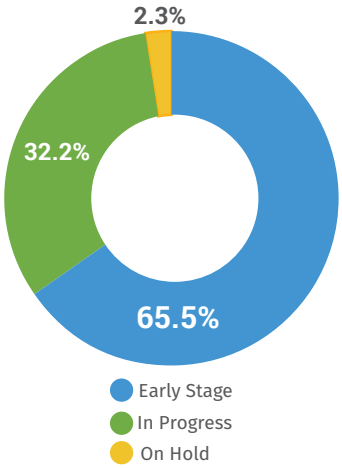


Source: BNC

Contribution of Leisure & Recreation Industry to Oman's Urban Sector



Stage-wise Distribution



Historical Center Khabourah

Value: USD 150 million
Stage: Concept
Developers: North Al Batinah Governor Office
Description: The project involves the construction of an Historical Centre in Khabourah, Al Batinah.
Completion: Q4 2028

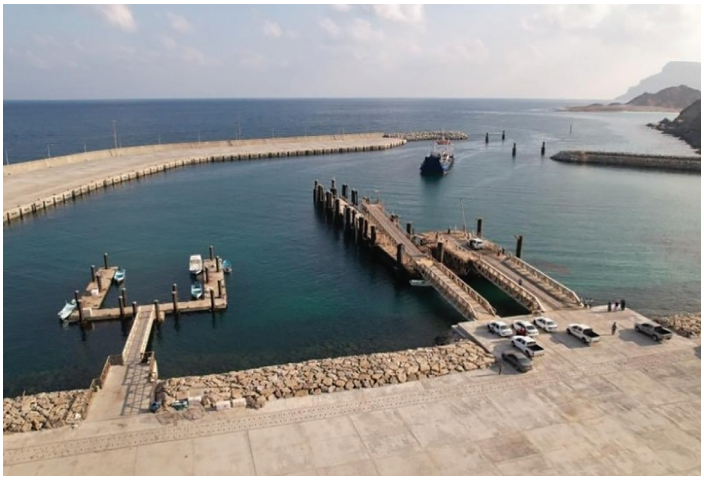


Spray Boulevard - Dhofar

Value: USD 104 million
Stage: Design
Developers: Ministry of Housing and Urban Planning (Oman), Ministry of Finance (Oman)
Description: The Spray Boulevard, spread over an area of 470,000 sqm, features a Grand Mall, the Square, Fountain Island, aquatic channel restaurants, local and international dining options, an educational botanical garden replicating natural environments, suspended walkways, theatres, specialised exhibitions and an event space. The development aims to establish a comprehensive entertainment venue that caters to both local and international communities, and supports Oman's status as a prominent tourist destination. The project is expected to be completed within four years and attract 800,000 visitors during the Khareef Season and 200,000 visitors during other seasons.
Completion: Q4 2028

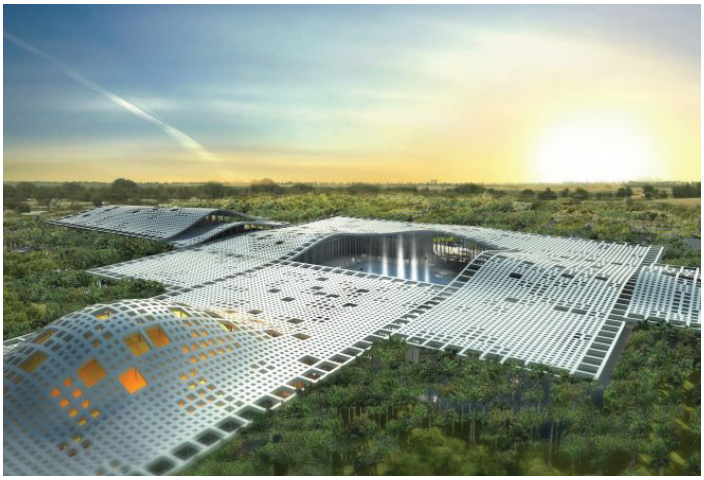


Shuwaymiya Waterfront - Shaleem and Hallaniyat Island



Value: USD 50 million
Stage: Tender
Developers: Dhofar Municipality
Description: The project, spanning 19,867 sqm and extending over 767.5 metres, aims to provide various amenities such as event spaces, recreational areas for children and a scenic sports walkway. Additionally, it will include a designated bicycle path, sufficient parking, a prayer hall and restroom facilities. To enhance its aesthetic charm and ecological sustainability, approximately 268 trees will be planted.
Completion: Q4 2029

National Theater - Oman Cultural Complex



Value: USD 80 million
Stage: Under Construction
Developers: Ministry of Heritage & Culture, National Records & Archives Authority
Main Contractor: SAH-SML JV Co (JV of Sembol Construction and Saif Salim Essa Al Harasi & Co. LLC)
Description: The project involves the construction of a 1,000-seat main auditorium and a 250-seat flexible auditorium.
Completion: Q4 2026

Omani Mountains Destination



Value: USD 2.4 billion
Stage: Under Construction
Developers: Ministry of Housing and Urban Planning
Description: Three villages will make up the Omani Mountain Destination, a mixed-use district for 8,000 people that's expected to create 5,000 jobs once complete. Set to be built at an altitude of 2,400 metres in the Jabal al Akhdar mountain range, the development is being led by Oman's Ministry of Housing and Urban Planning (MOHUP) with a masterplan by engineering firm AtkinsRéalis.

Hafeet Rail



Value: USD 2.5 billion
Stage: Under Construction
Developers: Etihad Rail, Oman Rail, Supreme Committee for Town Planning, Hafeet Rail, Ministry of National Economy, Asyad Holding Group, Ministry of Transport & Communications (Oman)
Main Contractor: National Projects & Construction LLC in a joint venture with Galfar Engineering and Contracting, in alliance with National Infrastructure Construction Company and Tristar Engineering
Description: The project involves the construction of a 238 km railway connecting Sohar Port to Abu Dhabi, with 163 km extending through Oman. The project will incorporate two tunnels, each spanning 2.5 km and 60 bridges, some towering up to 34 metres in height. Passenger stations will be located at Sohar and Al Ain, while freight stations will be at Sohar, Buraimi and Al Ain.
Completion: Q4 2027

Muscat Light Rail Metro Network



Value: USD 2 billion
Stage: Concept
Developers: Oman Rail, Ministry of Housing and Urban Planning (Oman), Ministry of Transport & Communications (Oman)
Description: The project involves the development of a light rail metro network linking the cities of Ruwi and Muttrah to the airport and Seeb in Oman. The metro will extend over a distance of 50 km and will include 36 passenger stations. The metro will be one of the main transport arteries of a revitalised Muscat, which will have Ghala as the centre of its commercial activities. The project will unfold in phases, with the initial phase focusing primarily on rejuvenating areas like Ruwi CBD, Ghala Business District, Burj al Sahwa and Seeb Souq area. Ruwi CBD will be the last stop for the Muscat Metro line, originating from Sultan Haitham City in Mabela, traversing through the emerging Al Khuwair Downtown.
Completion: Q4 2032

Sultan Haitham City



Value: USD 80 million
Stage: Under Construction
Developers: Ministry of Housing and Urban Planning (Oman)
Description: Sultan Haitham City, located in the Wilayat of A'Seeb, covers an area of 14.8 million sqm and prioritises sustainable urban planning, including 2.9 million sqm of green spaces. It will accommodate 100,000 people in 20,000 housing units, consisting of separate and semi-attached villas, townhouses and apartments. The city features 19 residential neighbourhoods supplied with various facilities and services.
Completion: Q4 2045

Integrated Sports City



Value: USD 500 million
Stage: Design
Developers: Oman Ministry of Sports Affairs
Description: Being developed in accordance with the Royal Directives of His Majesty Sultan Haitham bin Tarik, the Sports City aims to establish a world-class venue for hosting regional and international sporting events. It is being designed to accommodate international tournaments and provide top-tier training facilities. At the heart of the project will be a 25,000-seat football stadium featuring a natural grass pitch, synthetic tracks and amenities that comply with the standards of the International Federation of Association Football (FIFA) and the International Association of Athletics Federations (IAAF). The comprehensive plan also includes VIP lounges, team changing rooms and spectator services.
Completion: Q4 2029

Rimal Park – South Al Batinah



Value: USD 18 million
Stage: Ongoing
Developers: NA
Description: A 225,000 square metres mixed-use resort and entertainment complex. The development will feature a camping area, an equestrian school, and a variety of commercial activities designed to support small and medium-sized enterprises. These projects are poised to position the Al Abyad Sands area as a leading environmental tourism destination, fostering sustainable growth in the region while offering diverse experiences for tourists.
Completion: Q2 2025

Aames Bay Development – Musandam (Khasab)

Value: USD 18 million
Stage: Ongoing
Developers: NA
Description: A coastal leisure redevelopment focused on tourism uplift in northern Oman. The Project includes waterfront leisure and recreational amenities, andscaped promenades, cafes and sports zones.
Completion: NA



Yiti Integrated Tourism Project – Muscat Bay Area

Value: Phase 1 - USD 850 million
Stage: Ongoing
Developers: OMRAN
Description: The project is one of the largest sustainable tourism and leisure developments in Oman. will blend modern aesthetics with rich Omani cultural influences. It will cover a total area of approximately 15,748 square metres and will have a built-up area (BUA) of 22,266 square metres. With hotel resorts, theme pools, wildlife areas, equestrian centre, eco-tourism areas, cultural and adventure attractions.
Completion: 2026





View of Muscat from the sky



Riyam Heights, Muscat, Oman



View of Pearl Qatar



STATE OF QATAR

Having among the globally highest GDP per capita, oil-rich Qatar aims to become a knowledge-based, diversified economy and a thriving tourism hub.

Geography & Historical Background

Qatar is a peninsula located in the Middle East, bordered by Saudi Arabia to the south and surrounded by the Arabian Gulf on three sides. It lies in a strategic position near the Strait of Hormuz, a key global shipping route. Spanning approximately 11,586 square kilometres (sq km) makes Qatar one of the smallest countries in the region, with Doha as its capital.

Qatar's history spans thousands of years, with archaeological evidence of human settlements dating back to 8,000 years. Strategically located on ancient trade routes, it flourished as a centre for pearl diving and commerce. The Portuguese briefly controlled the region in the 16th century, followed by a period of Ottoman influence with limited oversight. The Al Thani family rose to prominence in the mid-19th century, uniting the tribes under Sheikh Mohammed bin Thani, who signed a treaty with Britain in 1868, establishing Qatar's autonomy. The discovery of oil in 1939 and the later exploitation of natural gas transformed Qatar into one of the wealthiest nations globally. Independence from Britain came in 1971 under Sheikh Khalifa bin Hamad Al Thani. From the 1990s, Qatar focused on economic diversification through investments in infrastructure, education and sports, gaining global influence with initiatives such as establishing the Al Jazeera media network and hosting the 2022 FIFA World Cup. Despite facing a diplomatic blockade in 2017, which was resolved in 2021 with the Al-Ula Agreement, Qatar remains a key player on the world stage.

Population

According to the World Population Review, Qatar's population stood at 3.08 million in 2024, up from approximately 3 million the previous year. This small yet one of the globally richest Gulf States comprises of a large expatriate population accounting for 88.4% versus 11.6% Qatari citizens. The median age in Qatar is about 33.22 years, with a life expectancy of 78.9 years. Additionally, Qatar's population is heavily male dominated with the current gender split being 74.91% male and 25.09% female.

Doha was ranked as the fourth most liveable city in the MENA region in the Global Liveability Index 2024 released by the Economist Intelligence Unit (EIU).



Qatar at a Glance

Official Name	Qatar
Land Area	11,586 sq km
Capital	Doha
Government	Absolute Monarchy
Emir	HH Sheikh Tamim bin Hamad Al Thani
Population (2024)	3.08 Million
Population Density	262.57 per square kilometre
Population Growth	1.73%
Nationality Split	11.6% Qatari and 88.4% non-Qatari residents
GDP (2023)	$213 Billion
GDP Per Capita (2023)	$80,195.9
GDP Growth (2023)	1.2%
Inflation – Consumer Prices (2023)	3%
Industries	Construction, education, F&B, financial services, hospitality, ICT, insurance, logistics, natural gas, petroleum, real estate, retail, technology, tourism
National Day	December 18, 1878
Independence Day	September 3, 1971
Official Language	Arabic
Dominant Religion	Islam
Currency	Qatari Riyal
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+974

Sources: World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	155,400	79,300	76,100
5 – 9	162,900	83,900	79,000
10 – 14	141,000	71,900	69,100
15 – 19	120,900	65,300	55,600
20 – 24	158,900	109,400	49,500
25 – 29	351,300	275,600	75,700
30 – 34	480,300	366,000	114,300
35 – 39	491,200	377,400	113,800
40 – 44	377,800	291,000	86,800
45 – 49	246,900	188,500	58,400
50 – 54	162,100	125,400	36,700
55 – 59	94,000	69,900	24,100
60 – 64	54,400	38,700	15,700
65 – 69	27,600	18,000	9,600
70 – 74	12,769	7,200	5,569
75 – 79	6,369	3,502	2,867
80+	4,563	2,357	2,206

Source: World Population Review

Population Density per City Snapshot (2024)



Source: World Population Review

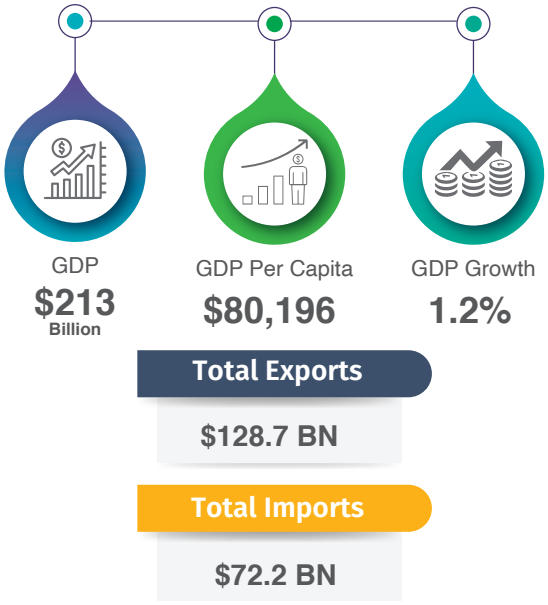
Economy

In the aftermath of the 2022 FIFA World Cup, economic growth in Qatar has remained "muted," the World Bank indicated, with a 1.2% increase in 2023. The oil and non-oil sectors grew by 1.4% and 1.1%, respectively.

Among the non-oil sectors, transportation, accommodation and food services performed well. Meanwhile, the Qatar Investment Authority (QIA) is expanding investments in technology, healthcare, aerospace and energy transition. Overall, according to the World Bank Gulf Economic Update, Qatar's non-oil sectors are expected to expand by 3.6%, supported by thriving tourist arrivals and large events.

Looking ahead, some challenges for the Qatari economy include geopolitical tensions and volatile energy prices. Yet, the economy is expected to remain resilient with its diversification and decarbonisation efforts.

State of Economy Highlights (in 2023)



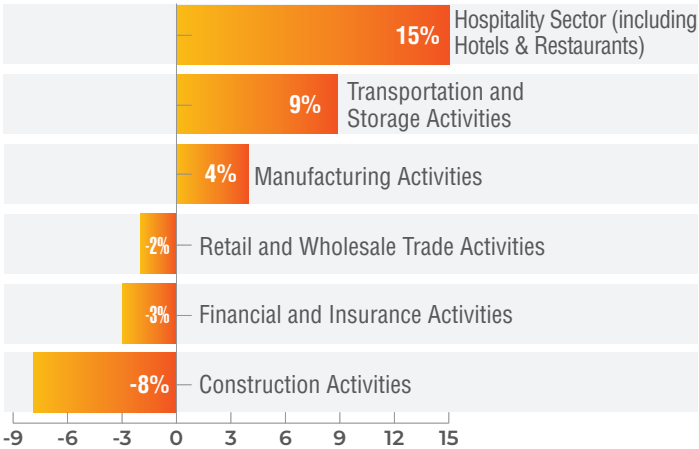
Sources: World Bank & CIA The World Factbook

GDP Projections

Indicators	2024 (Estimated)	2025 (Projected)
Real GDP Growth	2%	2.7%
Growth in Exports	2.7%	3.6%
Growth in Imports	4.7%	3.9%
CPI Inflation (Average)	1.3%	1.9%

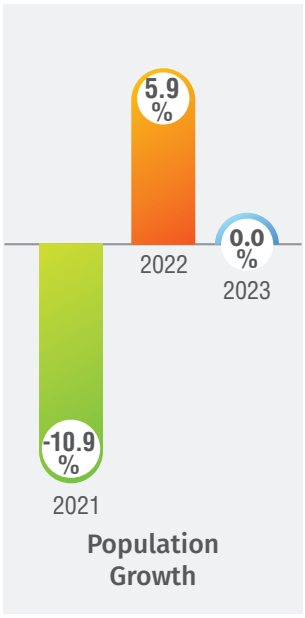
Source: World Bank

Sectoral Growth Rate - H1 2023

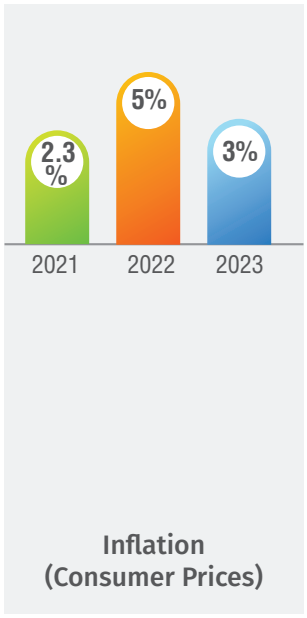


Source: National Planning Council, Qatar

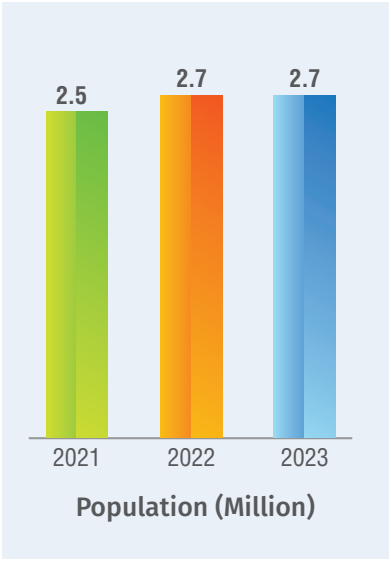
Key Macroeconomic Highlights

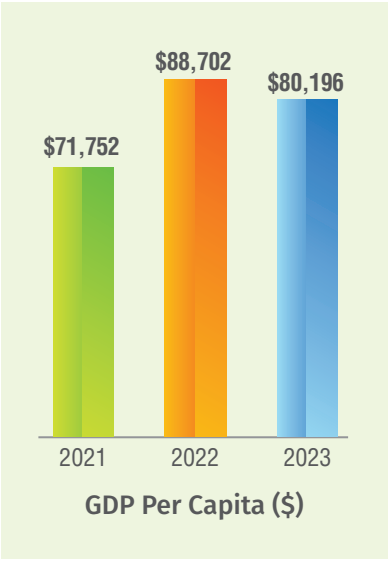


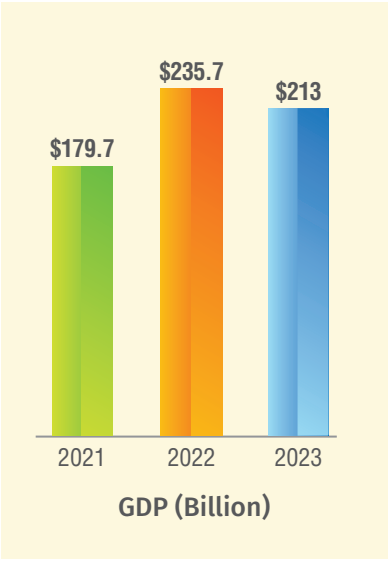












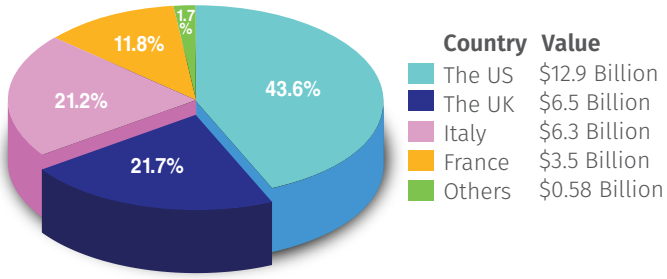
Source: World Bank

Investment

Owing to its robust business environment and investment opportunities, Qatar topped the FDI Standout Watchlist 2023 with an Investment Momentum Score of 87.64. This study is conducted by FDI Intelligence based on macroeconomic and foreign direct investment (FDI) trajectory of the world's top 50 FDI destinations using data from the International Monetary Fund (IMF) and FDI Markets.

Qatar aims to attract $100 Billion in FDI by 2030.

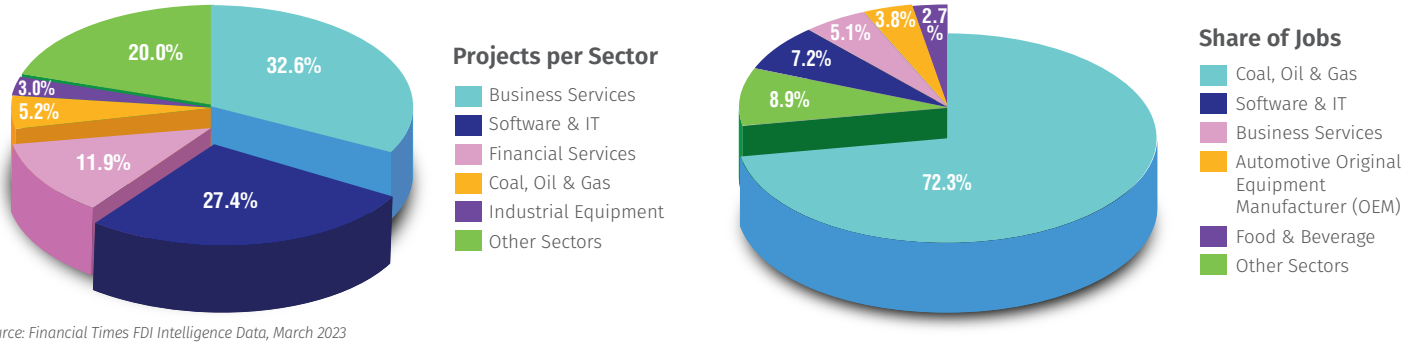
FDI by Source Country (2022)



Source: Financial Times FDI Intelligence Data, March 2023



FDI Projects & Jobs by Sector (2022)



Source: Financial Times FDI Intelligence Data, March 2023

Qatar was a top destination for foreign investment in 2022, with a remarkable six-fold increase in FDI. For perspective, during the second quarter of 2022 the country accounted for 71% of all FDI entering the Middle East region. It was ranked as the fifth largest inbound FDI market in the Middle East and Africa, as indicated by the Invest Qatar 2022 report.

In 2019 and 2020 there were 24 and 29, respectively, new FDI projects recorded in Qatar. In 2021 and 2022 these figures jumped to 106 and 143, respectively. However, the challenge for this Gulf state will be to retain the same momentum in the post-FIFA World Cup environment.

Key Enablers Boosting Investment Opportunities

- Up to 100% foreign ownership of companies
- Qatar's free zones offer competitive energy prices, 20-year corporate tax exemptions, zero income tax and zero Customs duties on imported goods
- Repatriation of profits
- Modern logistics infrastructure
- Transfers can be made in any convertible currency
- A legal environment based on English common law

Source: Oxford Business Group

Economic Impact of FIFA World Cup 2022

$220 Billion
Spent on key infrastructure and tourism projects

$10 Billion
(of the $220 Billion)
Spent on building eight new stadiums

A sizeable amount
Spent on construction of the Doha Metro and 30,000 hotel rooms



Pearl Monument in Doha, Qatar

Villaggio Mall

Qatar National Vision 2030

The Qatar National Vision 2030 (QNV 2030) launched in 2008 by the General Secretariat for Development Planning serves as the country's roadmap for building a modern, diversified and sustainable nation. It reflects Qatar's ambition to balance global aspirations with local traditions, cultural roots and Islamic values.

QNV 2030 is built upon four interconnected pillars with an aim to strengthen Qatar's role in international diplomacy, sports, culture and economic partnerships.

- **Human Development:** Empower people to build a sustainable and knowledge-based economy through high-quality education and training; opportunities for youth and women empowerment; and advanced healthcare systems.
- **Social Development:** Create a harmonious and cohesive society rooted in Islamic and cultural traditions while promoting tolerance, respect and inclusion; preserve cultural heritage and national identity; and strengthen families and social institutions.
- **Economic Development:** Economic diversification to reduce dependence on hydrocarbons to develop a competitive and knowledge-based economy; encourage entrepreneurship and private sector growth; and enhance infrastructure and technological advancements.
- **Environmental Development:** Balance development with environmental preservation to protect biodiversity and natural resources; reduce carbon emissions and promote renewable energy; advance sustainable urban planning.

Showcasing progress towards QNV 2030 include Qatar's investments to develop the Hamad International Airport and Hamad Port to enhance trade and connectivity. The North Field Expansion Project to boost its natural gas output, maintaining its leadership as a global LNG exporter. Qatar launched the Tarsheed Program to promote energy efficiency and water conservation. While the Green Qatar initiative focuses on increasing green spaces and combating desertification. Further, Qatar Foundation and Education City enhance Qatar's position in education and research endeavours.

Third National Development Strategy (NDS3) 2024–2030

Qatar launched the Third National Development Strategy (NDS3) 2024-30 in January 2024 to advance the nation's progress towards the objectives outlined in QNV 2030.

NDS3 2024-30: Key Goals Towards 2030

- Overall GDP growth of 4%
- Overall fiscal balance of 5.5% of GDP
- $100 Billion in FDI
- Position Qatar among the top 10 global destinations for investors
- $75 Billion in sustainable investment opportunities
- Reduce greenhouse gas emissions by 25%
- Achieve 4 gigawatts of renewable energy capacity
- 33% reduction in per capita household water consumption
- 50% reduction of food waste
- Over-20% share of Qatari workforce in private and mixed sectors
- 35% of women in leadership positions
- 2% labour productivity growth



Crescent Tower from Lusail Marina Park, Qatar

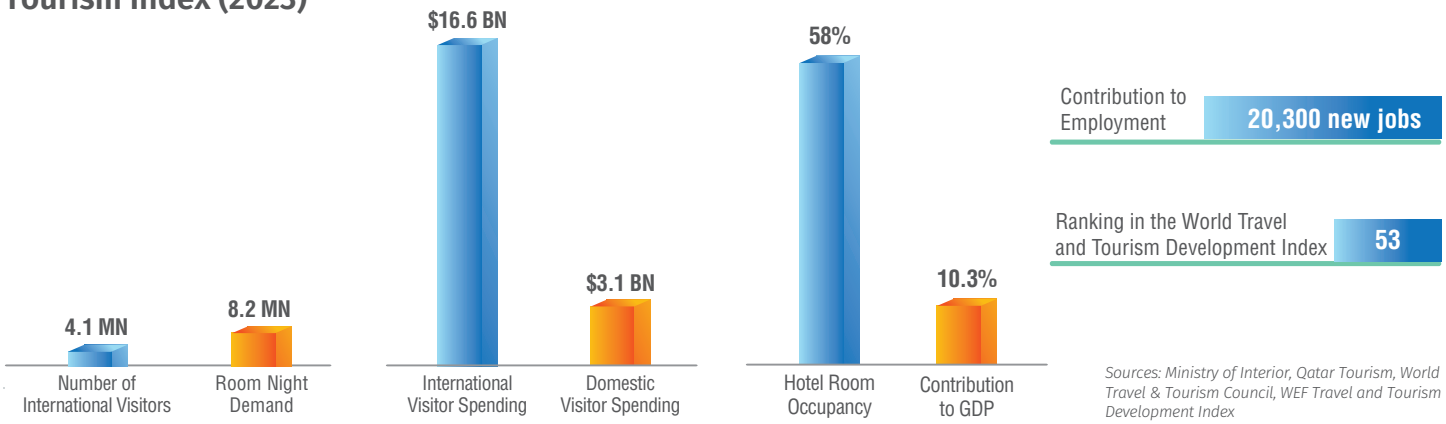
Qatar Tourism Sector

Qatar's tourism industry, which accounts for roughly one-tenth of the country's GDP, employs a sizeable number of people and plays a key role in the economy, stated an Oxford Business Group report. Since hosting the FIFA World Cup in 2022, Qatar's tourism industry has undergone a significant transformation. In the fourth quarter of 2022, Qatar hosted an estimated one million international visitors. In preparation for the global sporting event, since 2019 Qatar's supply of hotel rooms increased by nearly half, alongside opening of museums, cultural sites and visitor attractions. In 2023 the momentum initiated by the FIFA World Cup continued, as arrivals in the first three quarters of that year more than doubled compared to the same period during the previous year.

According to the World Travel & Tourism Council (WTTC) international visitors spent $15.1 billion in 2019, which rose to $16.4 billion in 2022 and is projected to reach $29.1 billion by 2033. While domestic tourists spent $2.4 billion in 2019, which rose to $2.6 billion in 2022 and forecast to increase to $4.3 billion in 2033.

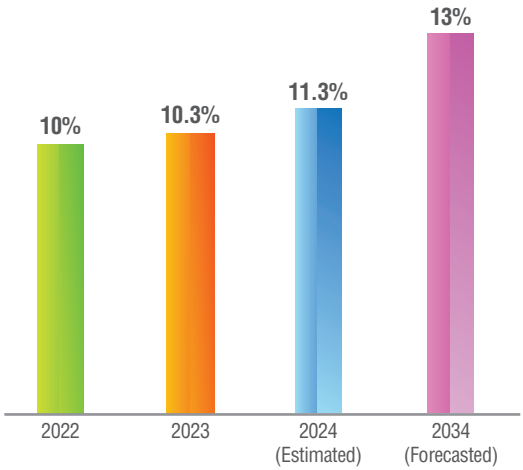
Notably, in 2023 Qatar reported more than four million international arrivals, a 58.4% increase from the previous year, according to Qatar Tourism. While 2023 broke the record for annual visitors to the country, January 2024 set a record for international arrivals in a single month, as more than 700,000 people visited during that month, more than double the figure reported during the same period in 2023.

Tourism Index (2023)



Sources: Ministry of Interior, Qatar Tourism, World Travel & Tourism Council, WEF Travel and Tourism Development Index

Tourism Contribution to GDP (%)

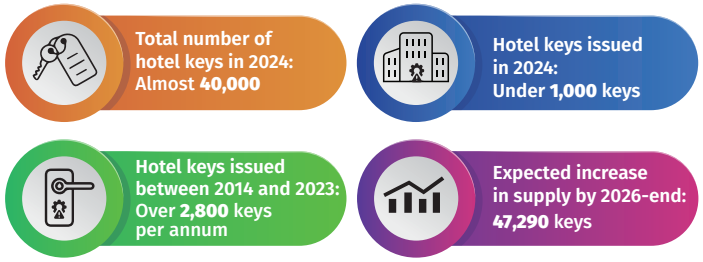


Sources: Invest Qatar and World Travel & Tourism Council

Tourism Contribution to GDP (value)

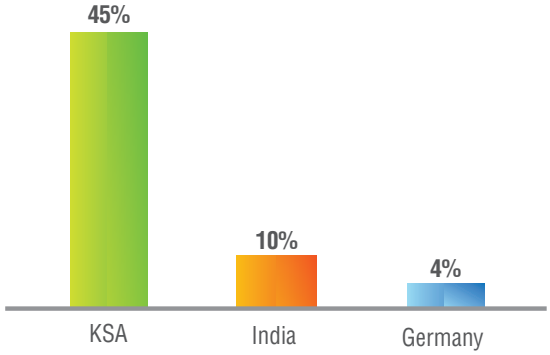


Qatar's Hospitality Market Overview



Sources: Cushman & Wakefield & Knight Frank

Top Source Markets by Tourist Arrivals



Source: Ministry of Interior, Qatar Tourism



Source: STR Global

Qatar Tourism & Hospitality Sector Growth in 2024

Over **2.6 Million** people visited Qatar in H1-2024

An increase of **28%** versus H1-2023.

Source: Planning and Statistics Authority, Qatar

Tourism Goals by 2030

Tourism Goals by 2030
Attract 6 Million visitors annually

Raise tourism contribution to **GDP to 12%**

Record $9.3 Billion in total in-destination spend

Register 19 Million total room nights versus **8.2 Million in 2023**

Source: Oxford Business Group report

Qatar Leisure & Entertainment Industry

Interestingly, in 2022, approximately 69.9% of international tourist spending was in the leisure category, while 30.1% was spent by business travellers, indicated the World Travel & Tourism Council.

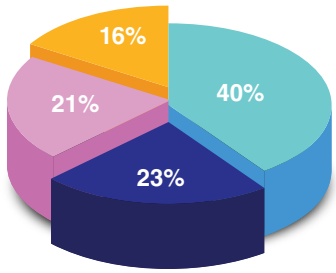
Taking the cue, Qatar is working to uplift its leisure and entertainment offerings to capitalise on spending by international visitors as well as residents. For instance, the country has announced the Simaisma Project, a $5.5 billion entertainment-focused development, spanning 8 sq km along 7 km of waterfront. Situated 40 minutes outside of Doha, the project will feature an expansive theme park, an 18-hole golf course, luxury resorts, a yacht club and marina, restaurants, shops and high-end residences. Not to forget the Meryal water park with the highest waterslide in the world is also uplifting Qatar's leisure and entertainment landscape.

Top 10 Activities: What People Want More of

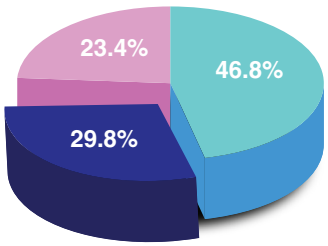
Food festivals and culinary events	28%
Sports events	27%
Music festivals and concerts	24%
Outdoor activities	21%
Theme parks/ water parks	21%
Cultural events	17%
Exhibitions	16%
Comedy shows	14%
Film festivals and movie screenings	13%
Gaming and e-sport events	11%

Sources: Ministry of Interior, Qatar Tourism, World Travel & Tourism Council, WEF Travel and Tourism Development Index

Frequency of Going Out for Leisure



Frequency Of Going Out for Leisure
- At least once a week
- Few times a month
- Once a month
- Less than that



Leisure Spending Pattern (2024)
- Stayed the same
- Increased
- Decreased

*Source: Spotlight*Qatar: Views On Leisure & Entertainment, Ipsos*



Place Vendôme Mall, Lusail, Qatar



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- **200,000+** companies
- **250,000+** key contacts

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Key Leisure & Entertainment Operators (MENALAC Members in bold)

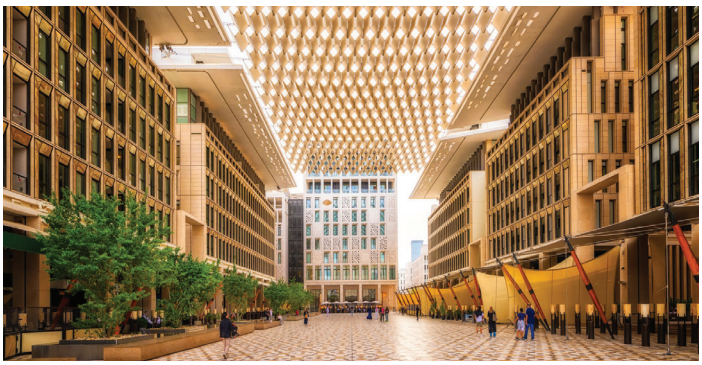
- Adventure Rooms Qatar
- Angry Birds World Theme Park
- Aspire Park Doha
- Chuck E. Cheese Qatar
- Circus Land
- **Doha Oasis Quest**
- **Fun City**
- **Fun Ville**
- Go Fun
- Gondolania
- JUMP
- Jungle Zone
- KidzMondo Doha
- Kidzania Doha
- Megapolis Entertainment Center
- Minipolis Qatar
- New City Entertainment
- Noor Land Entertainment
- One Tone Entertainment Qatar
- Snow Dunes Theme Park
- **Trampo Extreme**
- Velocity Gaming and Entertainment
- Virtuocity
- **VOX Cinemas**
- Xtreme Land
- Yippyland Entertainment



Desert Falls Water & Adventure Park



National Museum of Qatar



Msheireb Downtown Doha



Al Maha Sanctuary



Khor Al Adaid



Katara Cultural Village



Lusail Entertainment City



Angry Birds World Theme Park Doha



Qatar Olympic & Sports Museum, Al Rayyan



Fun Ville, Abu Sidra Mall



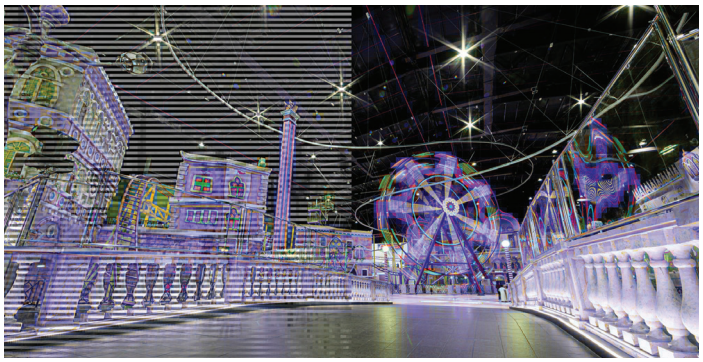
Doha Quest Theme park



Meryal Waterpark



Aqua Park



Gondolania



Lusail Winter Wonderland, Al Maha Island



Xtreme Land



WOW Park - World Of Wonders, Lusail



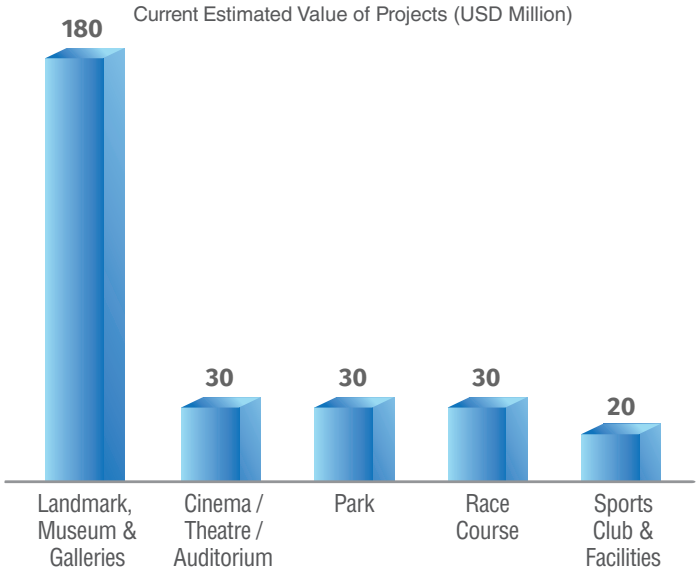
Aspire Zone

Upcoming Mega Projects at a Glance

Following the 2022 FIFA World Cup, Qatar has intensified efforts to position itself as a premier travel destination, investing in luxury resorts, cultural attractions and family-friendly entertainment hubs. Mega projects such as Lusail City and Doha's waterfront developments are enhancing the country's appeal. The hospitality sector continues to expand, with new hotels, resorts and fine-dining experiences catering to a growing influx of tourists and business travellers.

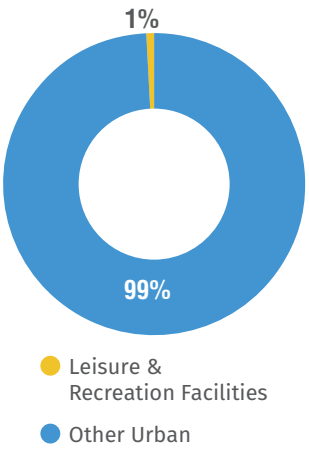
Meanwhile, the leisure and entertainment industry is flourishing, with theme parks, museums and large-scale festivals attracting visitors. Qatar's retail sector is also booming, led by high-end shopping malls, duty-free zones and a mix of international and local brands. With ongoing diversification efforts, sustainable tourism and infrastructural advancements, these sectors are set to significantly boost employment, investment and economic resilience in the years ahead.

Qatar's Leisure & Recreation Market Distribution

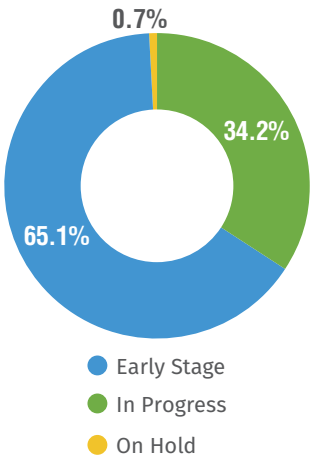


Source: BNC

Contribution of Leisure & Recreation Industry to Qatar's Urban Sector



Stage-wise Distribution



Simaisma Project

Value: USD 5 billion
Stage: Under Construction
Developers: Qatari Diar Real Estate Investment Company
Description: Spanning 8 million square metres (sqm) and extending along 7 km of pristine beachfront on Qatar's eastern coast, Simaisma will offer unique all-year-round experience with outdoor air-conditioning technology. The project will provide promising investment opportunities, with 16 tourism zones available for development, including resorts that spread out over four zones each with a unique design and character. In addition, the project will feature a large theme park spanning 650,000-sqm, a signature 18-hole golf course, residential villas, a yacht marina, as well as luxury restaurants and retail. Sustainability will be a fundamental pillar of the project, with reliance on smart systems, in addition to the use of local and recycled materials, as well as the latest in construction technology.
Completion: NA



Gewan Island

Value: NA
Stage: Under Construction
Developers: United Development Company (UDC)
Description: Spanning approximately 400,000 sqm, Gewan Island is a man-made island off the coast of The Pearl-Qatar that embodies the future of luxury. This real estate development is designed to integrate residential buildings, commercial properties, entertainment facilities, green spaces and world-class hospitality.
Completion: Q4 2025



Land of Legends

Value: USD 3 billion
Stage: Under Construction
Developers: FTG Development, Qatari Diar Real Estate Investment Company
Description: Expected to attract two million visitors annually, Land of Legends Qatar is poised to play a central role in advancing Qatar's tourism landscape, thereby supporting the nation's ambitions for economic diversification. Covering 650,000 sqm, the project will offer an unforgettable experience, guiding visitors on a captivating journey inspired by Ibn Battuta, through seven uniquely themed zones. Land of Legends Qatar will unfold as a modern 'Rihlah', inviting guests to explore diverse landscapes, immersive experiences and cultural wonders. The destination will brim with attractions for all ages, including a family-friendly hotel with 1,000 stylish rooms, conference facilities, beachside activities and the Music Hotel – a multicultural hub celebrating the world's music and its evolution. From an impressive 80-metre-high mountain to boat parades along scenic canals and thrilling water-based adventures, every element promises something extraordinary. It will house the region's first Moving Theatre, equipped with state-of-the-art interactive technology.
Completion: Q4 2028



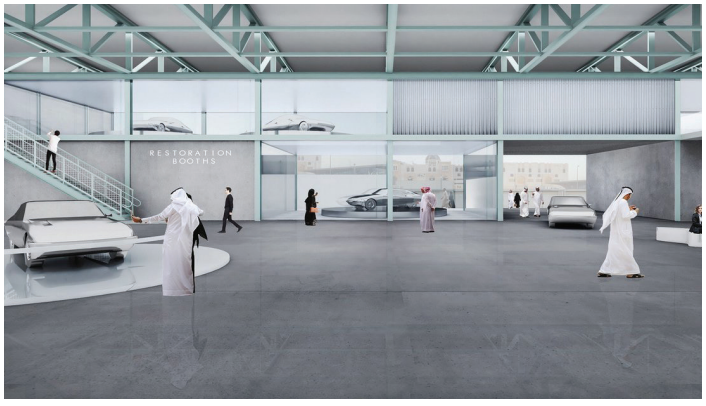
Renovation of Heritage Buildings for Qatar Media Corporation

Value: USD 23.8 million
Stage: Under Construction
Developers: Public Works Authority (PWA) (Ashghal)
Main Contractor: Doha International Company
Description: The maintenance and renovation will include strengthening the existing structural elements, rehabilitating the façade, updating interior finishes to a contemporary style, including the addition of a theatre and various studios, installing new internal partitions and repairing the existing built-up roofing systems. Mechanical and electrical services modifications involve adaptive alterations, enhancements to ventilation and central air-conditioning systems, upgrades to hot and cold water services, improvements to sanitary installations and fire protection systems, as well as alterations and renovations to electrical, fire alarms, CCTV, public address and other low current systems.
Completion: Q4 2026



Qatar Auto Museum - Lusail Expressway

Value: USD 35 million
Stage: Design
Developers: Qatar Museums Authority
Description: The 40,000 square metres (sqm) museum will include permanent galleries that track the evolution of the automobile from its invention through today, and how it has influenced culture in Qatar, and temporary exhibition spaces for the display of high-profile vehicles from supercars and limited editions to race cars and classic cars. Additional facilities will include an Edutainment Centre and Workshop Spaces, as well as areas dedicated to children's activities such as driving simulators, mini car mechanics, kids' driving areas and more. The Edutainment Centre will include workshops, besides collaborations with universities, science and technology centres and other institutions, making the museum a community hub for students, engineers, car lovers and enthusiasts. The museum will have a garage and a Technology Hub, as well as a restoration centre and this will be an open door conservation lab.
Completion: Q2 2027



The Art Mill Museum - Doha Port



Value: USD 120 million
Stage: Design
Developers: Qatar Museums Authority
Description: The project involves the development of an art museum on a historic waterfront site at Doha Bay. The Art Mill will spread over an area of 92,903 sqm in the heart of Doha. The project will also include an exhibition space, education, event and conference space, centres for art conservation and storage and community gathering facilities. The strict geometry of retained silos, coupled with a looser grouping of new silos, will act as cooling chimneys circulating air through the site that extends spectacularly on three sides into Doha Bay.
Completion: Q4 2032

Lusail Beach Club - Waterfront Residential District



Value: USD 10 million
Stage: Under Construction
Developers: Qatari Diar Real Estate Investment Company (QDREIC), Blue Rock Contracting, Lusail Real Estate Development Co.
Main Contractor: Shelter Group
Description: The project consists of a high-end beach club that will serve the residents of the surrounding towers. The beach club is located on two plots of land, consisting of 16 beach cabins and 2 beach club buildings and restaurants. The club offers an expansive area for leisure and recreation, designed to seamlessly integrate luxury, functionality and sustainability. The club features a wide range of amenities, including a beachside café, upscale restaurant, spa, infinity pool and water sports facilities, all designed to promote relaxation and leisure.
Completion: NA



Shopping Mall inside the MSC Virtuosa Cruise Ship, Doha



Burj Khalifa, Downtown Dubai



THE UNITED ARAB EMIRATES

The United Arab Emirates (UAE) has steadily earned the status of a key global hub for trade and tourism, driven by the country's strategic progress in economic diversification.

Geography

The UAE is located on the southeastern corner of the Arabian Peninsula, bordered by Saudi Arabia to the south and west, Oman to the southeast and the Arabian Gulf to the north. It covers an area of approximately 83,600 square kilometres (sq km). The country boasts a diverse mix of landscapes, including vast deserts, mountain ranges, coastal plains and islands scattered along the Arabian Gulf. With over 1,300 kilometres of coastline, the UAE has several ports and harbours, making it a significant player in global maritime trade. Prior to the formation of the UAE, the region consisted of small, independent emirates governed by local rulers. Known as the Trucial States, these emirates had agreements with the British government for protection in exchange for control over foreign relations and maritime security.

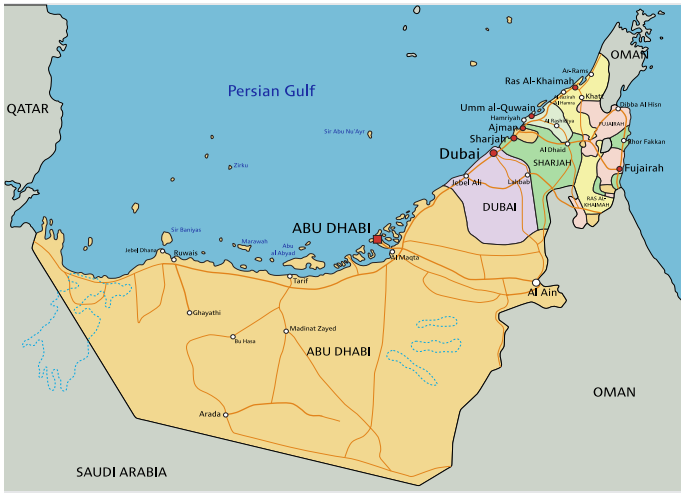
After the British government withdrew from the Gulf region by the end of 1971, the rulers of the emirates formed a union to ensure security, stability and prosperity. On December 2, 1971, six emirates – including Abu Dhabi, Dubai, Sharjah, Ajman, Umm Al-Quwain and Fujairah – came together to form the UAE under a federal system. Ras Al Khaimah joined the union a few months later, on February 10, 1972.

Population

According to the World Population Review, the UAE's population stood at 11.03 million in 2024, up from 10.64 million the previous year. Home to over 200 nationalities, expatriates account for approximately 88-89% of the country's population, with Emirati nationals making up around 11-12%. Boasting a large youth population, the median age of the UAE is approximately 30.3 years, with a total life expectancy of 77.7 years. The UAE has the seventh highest net migration rate in the world at 12.36.

The UAE has emerged as a global hub that attracts a diverse and highly skilled workforce from around the world. Its multicultural environment, thriving economy, investment opportunities and a high quality of life make it a desirable destination for professionals across various sectors. In addition to recent visa reforms, including long-term residency visas such as the Golden Visa, access to modern infrastructure and services, a diverse yet inclusive environment, the UAE is also one of the safest countries globally making it a thriving hub for expatriates.

Notably, Abu Dhabi and Dubai ranked highest for ease of entry for foreign talent in global consulting firm Kearney's '2024 Global Cities Report'. Additionally, Dubai was the only city from the region to secure a spot in Kearney's 'Global 30 Cities Index', ranking 24th overall.



United Arab Emirates at a Glance

Official Name	United Arab Emirates (UAE)
Land Area	83,600 sq km
Capital	Abu Dhabi
Government	Federation of Monarchies
President	His Highness Sheikh Mohamed bin Zayed Al Nahyan
Vice President & Prime Minister	His Highness Sheikh Mohammed bin Rashid Al Maktoum
Population (2024)	11.03 million
Population Density	155 per sq km
Population Growth	3.62%
Nationality Split	10% UAE nationals and 90% expatriates
GDP (2023)	$514.13 billion
GDP Per Capita (2023)	$49,040.7
GDP Growth (2023)	3.6%
Inflation – Consumer Prices (2023)	1.6%
Industries	Construction, e-commerce, education, F&B, financial services, healthcare, hospitality, ICT, insurance, logistics, manufacturing, media, pharmaceuticals, petrochemicals, petroleum, real estate, retail, security, technology, tourism, transportation and storage.
National Day	December 2
Official Language	Arabic
Dominant Religion	Islam
Currency	Emirati Dirham (Đ)
Time Zone	Arabian Standard Time (GMT+4)
Calling Code	+971

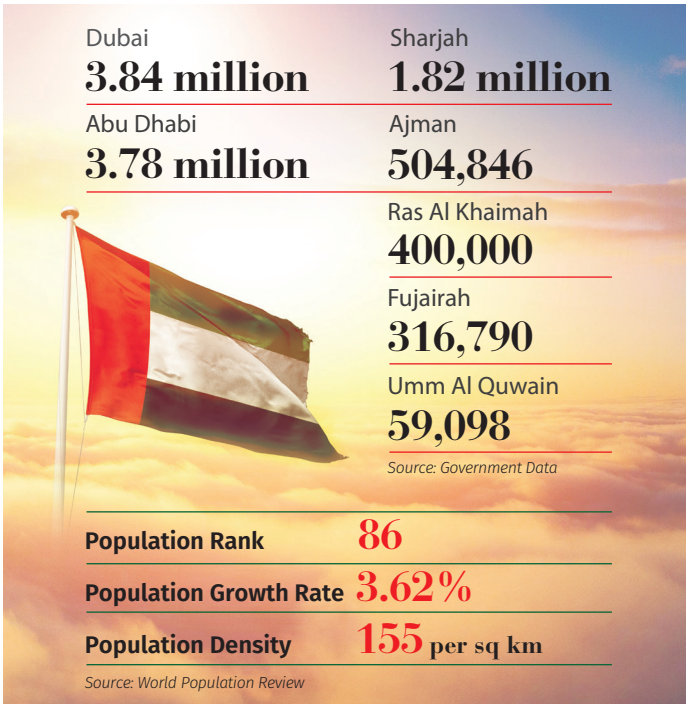
Sources: World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	581,200	293,600	287,600
5 – 9	616,100	310,900	305,200
10 – 14	579,300	292,500	286,800
15 – 19	502,600	267,000	235,600
20 – 24	919,500	557,300	362,200
25 – 29	1,456,500	982,400	474,100
30 – 34	1,674,300	1,184,900	489,400
35 – 39	1,517,400	1,033,700	483,700
40 – 44	1,091,400	730,200	361,200
45 – 49	756,900	531,200	225,700
50 – 54	534,700	370,800	163,900
55 – 59	383,700	245,300	138,400
60 – 64	218,700	137,800	80,900
65 – 69	90,600	53,100	37,500
70 – 74	55,000	30,000	25,000
75 – 79	29,200	15,800	13,400
80+	20,016	9,914	10,102

Source: World Population Review

Population Per City (2024)



Data is represented in ascending order (from highest to lowest population)

Economy

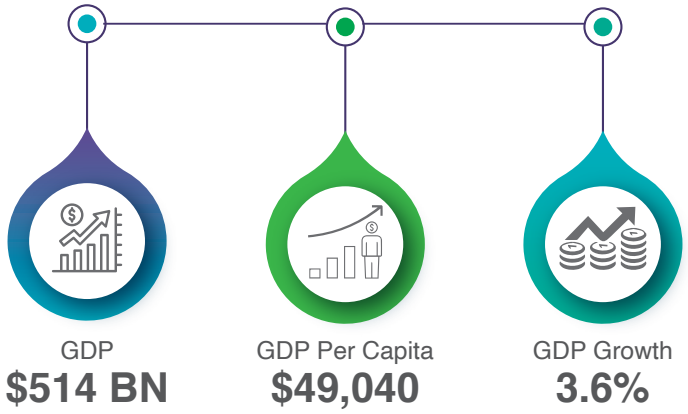
According to the International Monetary Fund (IMF) the UAE's economic growth remains strong, driven by robust domestic activity. Healthy tourism flows and increased activity in sectors including construction, manufacturing and financial services have spurred non-oil growth.

Meanwhile, recently released data from the UAE Central Bank indicated that the UAE's economy grew by 3.9% in 2024. The non-oil economy expanded by 4.6% in 2024 and is expected to grow by 5.1% this year. The hydrocarbon sector, which had contracted by 3.1% in 2023, grew by 1.6% in 2024, with further growth of 3.6% projected for this year and 8.5% for 2026. Additionally, the UAE's non-oil foreign trade reached $816.9 billion in 2024, marking a 14.6% year-on-year increase. Looking ahead, the regulator forecasts GDP growth of 4.7% in 2025 and 5.7% in 2026.

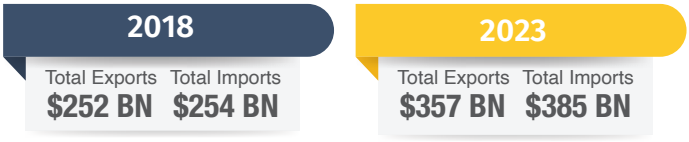
Indicators	*2024 (Estimated)*	*2025 (Projected)*
Real GDP	3.7%	5.0%
Real Non-Oil GDP	4.9%	4.2%
CPI Inflation (Average)	2.2%	2.0%

Source: IMF

State of Economy Highlights (in 2023)



Sources: World Bank & CIA The World Factbook



Source: OEC

Economic Goals of Dubai Economic Agenda

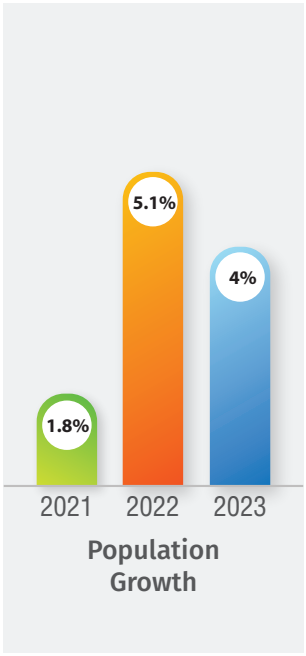
Increase foreign trade from **$4 trillion** in the past decade to **$7 trillion** for goods and services in the next decade.

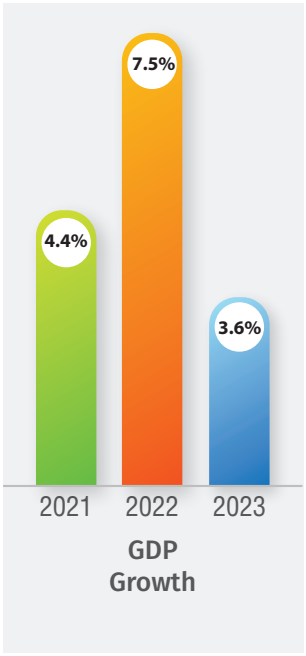
Increase FDI from an average of **$8.7 billion** annually in the past decade to an average of **$16.4 billion** annually in the next decade to reach a total of **$177 billion** by 2033.

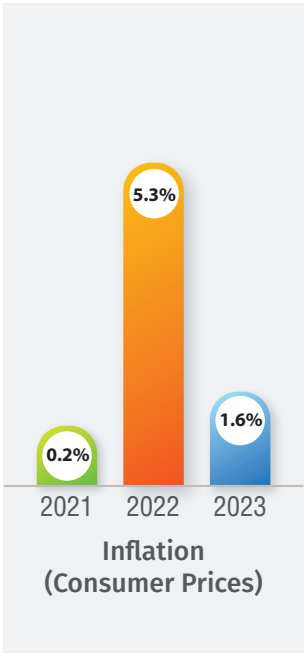
Add 400 cities to Dubai's foreign trade map.

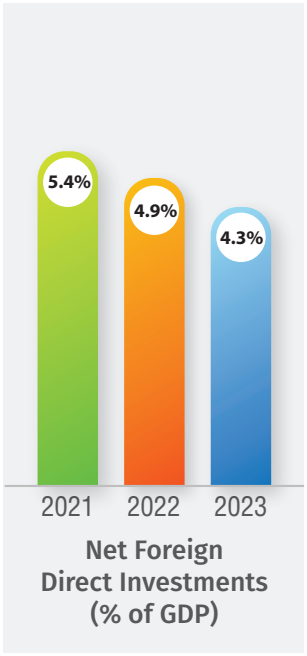
Launch Dubai's **Future Economic Corridors 2033** with Africa, Latin America and Southeast Asia.

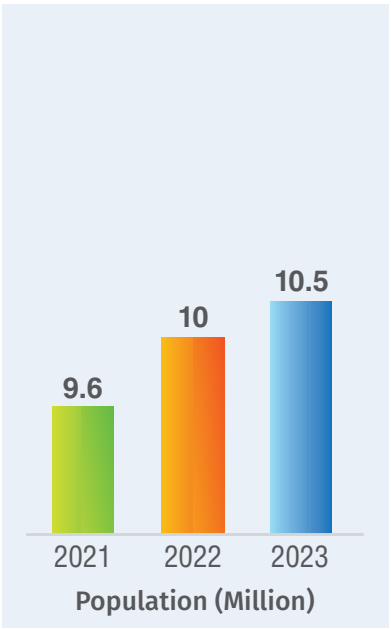
Key Macroeconomic Highlights

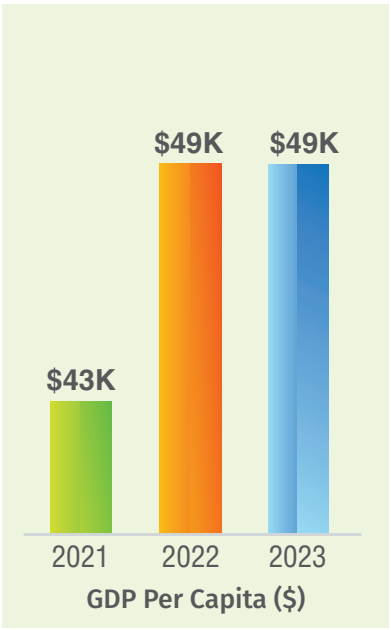


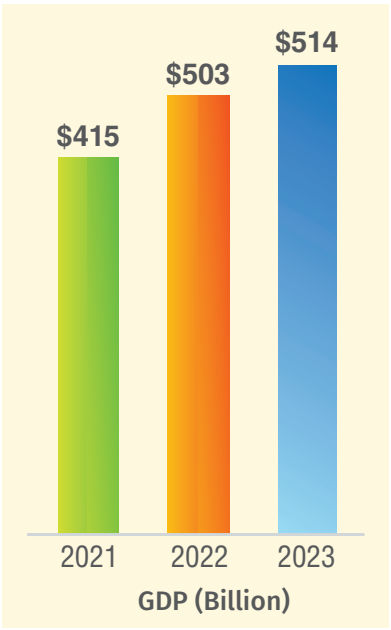












Source: World Bank



Yas Marina, Abu Dhabi

Investment

The value of foreign direct investment (FDI) inflows to the UAE in 2023 stood at approximately $30.7 billion versus $22.7 billion in 2022, ranking second globally in terms of FDI inflows, indicated the World Investment Report 2024 issued by the United Nations Conference on Trade and Development (UNCTAD).

Notably, the UAE ranked 7th in the 2024 edition of the World Competitiveness Yearbook.

Promising Sectors for Foreign Investments

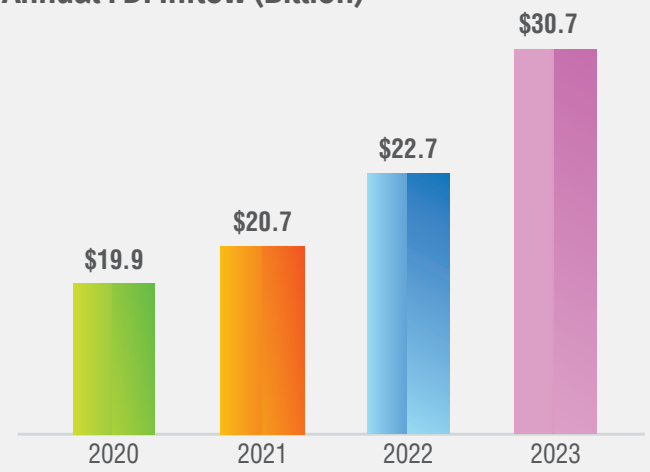
- Fintech
- E-commerce
- Agritech
- Healthcare
- Education
- Tourism
- Space
- Logistics Services
- ICT
- Manufacturing
- Medical Tourism
- Renewable Energy
- Media and Entertainment
- Creative Industries
- Gaming
- Smart Cities

Factors making the UAE a Global Business Hub

100%	Foreign ownership of companies in mainland & free zones
0%	Income tax imposed on employees
10 Year Golden Visa	For investors, entrepreneurs and talented professionals
10	Airports
12	Ports

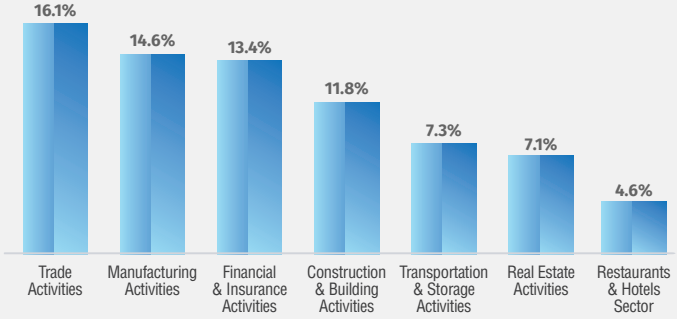
Source: UAE Ministry of Economy

Annual FDI Inflow (Billion)



Sources: UAE Ministry of Economy & World Investment Report 2024

Growth Rate in 2024



75% Approximately **Total Contribution by the Non-Oil Sectors**

Source: Federal Competitiveness and Statistics Centre



Museum of the Future, Dubai

The UAE aims to increase its FDI inflows to $65.4 billion by 2031.

Source: His Highness Sheikh Mohammed bin Rashid Al Maktoum's post on X



‘We the UAE 2031’

Aerial view of Abu Dhabi

In 2010, His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, launched the ‘UAE Vision 2021’ that focused on creating a cohesive, prosperous and sustainable society in time for the UAE’s 50th anniversary in 2021. The key pillars of UAE Vision 2021 included encouraging strong national identity and civic responsibility; building a competitive knowledge-based economy; ensuring high-quality healthcare, education and infrastructure; enhancing safety, security and global influence; and preserving the environment and natural resources for future generations.

The initiatives that started with UAE Vision 2021 have continued through the ‘We the UAE 2031’ Strategy that was launched in November 2022 focused on the next decade of progress. The **four-fold objectives** of the ‘We the UAE 2031’ Strategy include:

- **Establish economic leadership:** Make the UAE one of the top 10 global economic powers. Increase non-oil exports and diversify the economy.
- **Ensure global influence:** Strengthen the UAE’s global partnerships. Enhance its role as a key player in international diplomacy and development.
- **Emphasise on quality of life:** Develop world-class healthcare and education systems. Ensure a balanced lifestyle for residents.
- **Elevate innovation and sustainability efforts:** Advance renewable energy projects and green initiatives. Invest in cutting-edge technology and innovation.



Economic Diversification

Reduce reliance on oil and expand sectors such as tourism, technology and renewable energy.

Initiatives like Dubai Economic Agenda and Abu Dhabi Economic Vision 2030 complement these efforts.



Sustainability

Commitments such as Net Zero by 2050 and investments in clean energy.

Key developments such as Masdar City underline the UAE’s commitment to environmental stewardship.



Tourism and Culture

Iconic destinations, including but not limited to Burj Khalifa, Expo City Dubai and Louvre Abu Dhabi, which blend modernity with cultural heritage, have strategically positioned the UAE as a global tourism hub.



Talent Development

Ensuring diversity, inclusion and equity.

Empowering Emirati citizens while providing opportunities to expatriates to contribute to the nation's growth.

UAE Tourism Sector

The UAE ranked 18th globally and 1st regionally in the World Economic Forum's Travel & Tourism Development Index (TTDI) 2024, rising seven places from its 25th global ranking in 2019.

Meanwhile, the country's tourism sector grew by 26% in 2023 versus 2022, surpassing the 2019 levels by 14%. While domestic visitor spending fully recovered in 2022, it continued to grow in 2023 totalling over $15.11 billion, almost 40% higher than 2019. International visitor spending surged by almost 40% in 2023 totalling $47.64 billion, 12% above 2019 levels. Notably, the travel and tourism sector accounted for one in nine jobs in the country.

Looking ahead, the World Travel & Tourism Council forecasts that the UAE's travel and tourism sector will grow its annual GDP contribution to more than $74.87 billion by 2034, almost 11% of the UAE economy, employing over 928,000 people across the country.

To attract more global visitors and further catalyse the sector's contribution to the economy, the UAE Tourism Strategy 2031 was launched in November 2022.

By 2034, the UAE tourism sector is projected to employ more than 928,000 people, contributing to over $74.8 billion to the GDP –

World Travel & Tourism Council

UAE Tourism Strategy 2031 – A Snapshot

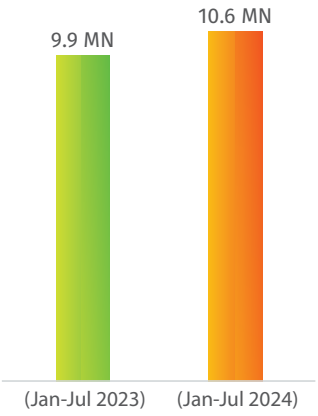
- **40 million** Hotel Guests by 2031
- **$122.5 billion** Tourism Contribution to GDP
- **$27.2 billion** Attract Additional Tourism Investments

Abu Dhabi Hospitality Market is Buoyant

- **Hotel Visitors:** 2.4 million (Jan-May 2024)
- **Hotel Stock:** Q3-2024: 32,800 Rooms; Q4-2024: +540 New Keys
- **Top Destinations:** Yas Island & Saadiyat Island
- **Performance Metrics** (as of Sep 2024): ADR Growth: +12.2%; RevPAR Growth: +23.6%; Occupancy Increase: +7.1 PP

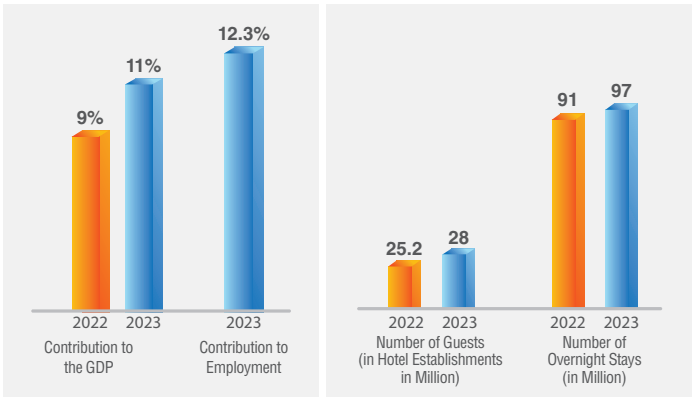
Source: JLL

Dubai Tourism Growth



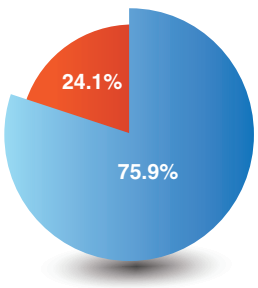
Source: Dubai Economy & Tourism

Tourism Index



Ranking in the World Travel and Tourism Development Index	25th Globally	18th Globally
Tourism Revenue	$45 Billion	$60 Billion
Average Length of Stay	3.9 days	3.5 days

Source: Ministry of Economy UAE & DTCM



International Visitor Spending

$47.6 Billion

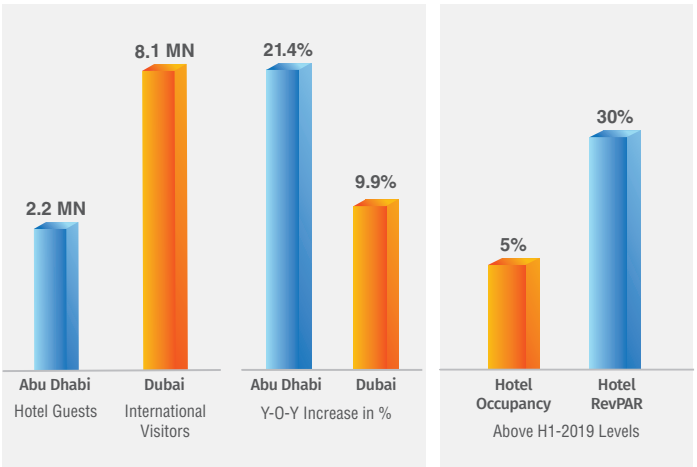
Domestic Visitor Spending

$15.1 Billion

- 75.9% International Tourism's Contribution to Total Tourism Spending
- 24.1% Domestic Tourism's Contribution to Total Tourism Spending

Sources: Ministry of Economy UAE & World Travel & Tourism Council (2023 data)

Growth in the UAE Hospitality Sector – H1 2024



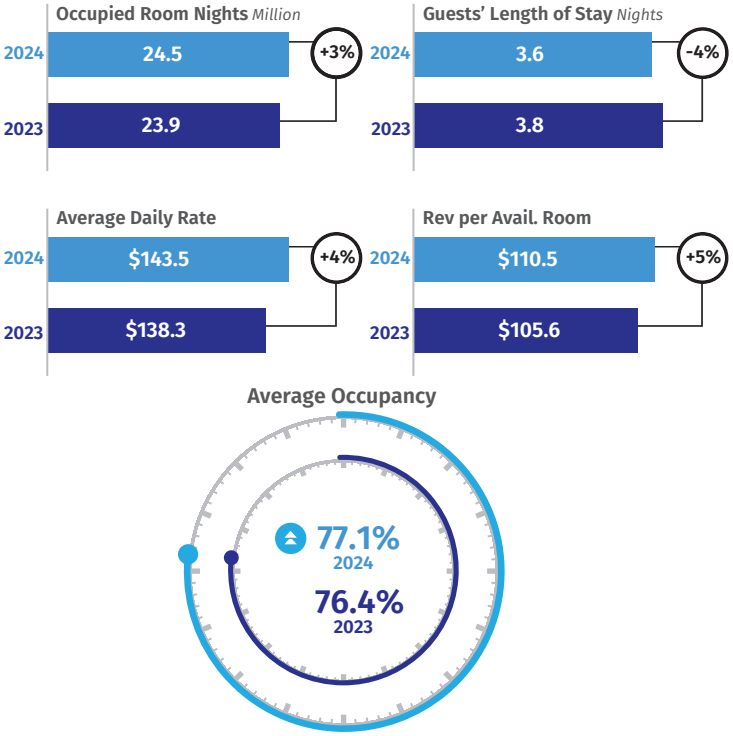
Source: CBRE

Indicators	2023	2024 (estimated)
Tourism Contribution to GDP (Value)	$60 Billion	$64.3 Billion
Tourism Contribution to GDP (%)	11.7%	12%
Domestic Visitor Spending	$15.1 Billion	$15.8 Billion
International Visitor Spending	$47.6 Billion	$52.3 Billion
Jobs Generated	809,000	833,000

Source: World Travel & Tourism Council

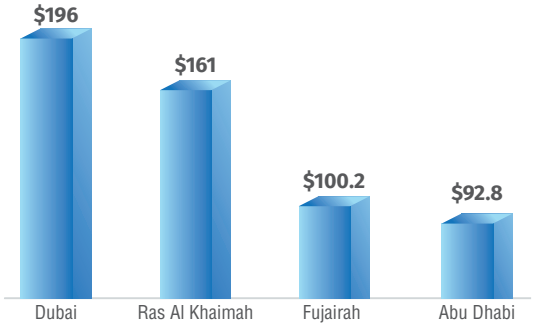
Dubai Visitors Drive Economic Growth In Hotels

(YoY Jan - Jul) [2024 | 2023]

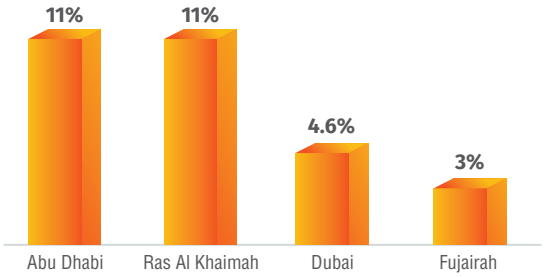


Growth in ADR in the UAE Hospitality Sector

Average Daily Rate (ADR) H1-2024



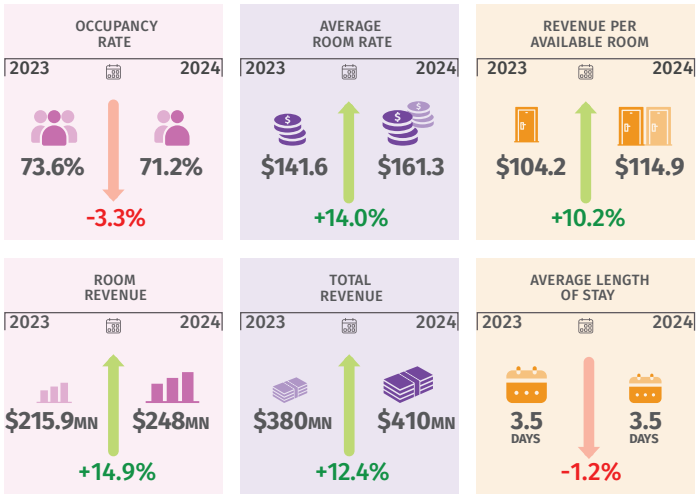
Growth – H1-2024 vs. H1-2023



Source: Cavendish Maxwell

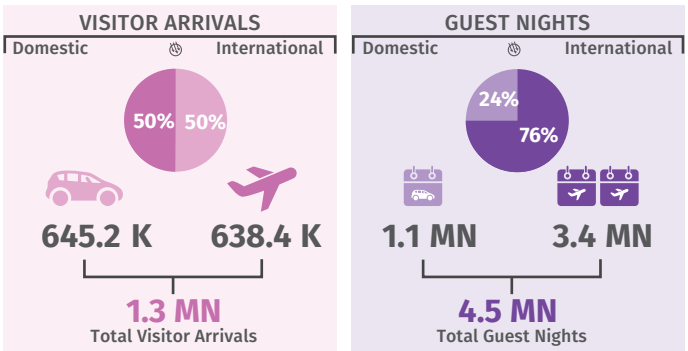
RAK Tourism FY2024 Performance

Stats & Figures

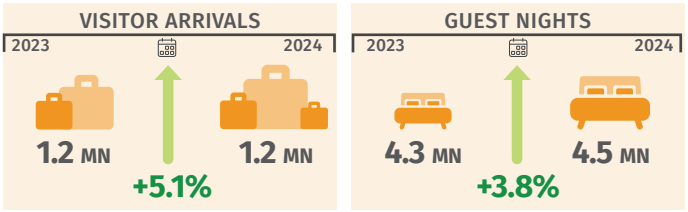


Source: RAKTDA

Domestic vs International



Visitor Arrivals & Guest Nights





UAE Leisure & Entertainment Industry

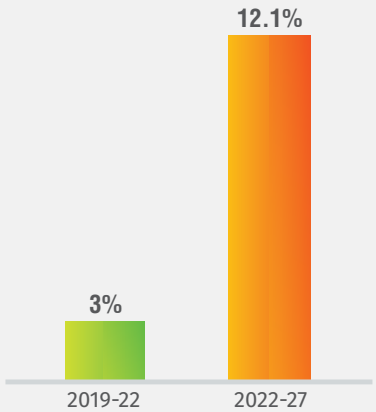
Another industry that's poised for robust growth is leisure and entertainment, projected to reach $20 billion by 2027, Ken Research estimates. The sector is being fuelled by the diverse amusement offerings, a desire to spend on leisure experiences and rising disposable income, coupled with tourism related spending.

In addition to the existing leisure offerings – including family entertainment centres, theme parks, water parks, edutainment centres, visitor attractions, cultural centres and nature & wildlife centric experiences, live music & theatrical events and concerts, immersive & interactive experiences and e-sports are further elevating the UAE's entertainment landscape.

Along with Abu Dhabi and Dubai, the other emirates such as Ras Al Khaimah are steadily emerging as tourism hubs owing to its diverse nature-centric and outdoor activities, cultural offerings, adventure sports, hospitality and leisure facilities, including gaming experiences.

In the context of gaming experiences, the UAE has shown willingness to adapt to global trends while maintaining its cultural identity. If gaming facilities are introduced, they are expected to be tightly regulated. This development reflects the UAE's evolving approach to leisure and entertainment, to remain a competitive global destination while adhering to its legal and cultural values.

UAE Leisure & Entertainment Market Growth Projections (CAGR)



Source: Ken Research

The UAE's leisure and entertainment market witnessed 32.1 million walk-ins in 2022. Based on the number of walk-ins, arcades, indoor theme parks and cinemas arcade collectively accounted for more than half of the footfall.



Dancing Fountain Show, Dubai

Key Leisure & Entertainment Operators (MENALAC Members in bold)

- 3D World Selfie Museum Dubai
- Action Park Dubai
- Action Zone
- **Adventureland**
- Adventure HQ
- **Air Maniax**
- Ajman Aqua Bounce
- Al Ain's Wadi Adventure
- National Aquarium, Al Qana
- Qanat Al Qasba
- Al Ain Zoo
- **Antic's Land**
- Aqua Fun Dubai Aqua Park, JBR
- Arabian Nights Tours
- **Atlantis Aquaventure**
- Aventura Park
- Battleworld JVC
- Battle Karts
- Battle Park
- Boo Boo Laand
- Bouldering at Rock Republic
- Bounce Dubai
- **Brass Monkey**
- Bricks4fun
- Caboodle
- Chaos Karts
- **Cheeky Monkeys**
- **Clymb**
- Dreamland Aqua Park UAQ
- **Dubai Aquarium & Underwater Zoo**
- **Dubai Ice Rink**
- **Dubai Opera**
- Dubai Safari
- **Ekart Zabeel**
- Escape Rooms
- Extreme Fun
- **Fabyland**
- **Ferrari World**
- **Fia Fia – New**
- Freij Entertainment L.L.C.
- Fujairah Aqua Bounce
- Funky Monkeys Playland
- **Fun Block - First Avenue Mall**
- **Fun City**
- **Fun Works, Abu Dhabi**
- Global Village Dubai
- Green Planet L.L.C.
- **Hello Park**
- House of Hype
- Hysteria Haunted Attractions
- Ice Land Water Park In Ras Al Khaimah
- **iFly**
- **IMG Worlds of Adventure Dubai**
- **Immersive Experiences DARE**
- Jumpbox Indoor Trampoline Park
- Jungle Bay Waterpark
- Kids Hub Entertainment
- Kids Wonderland
- Kidz Palooza Koom
- **Kidzania**
- Loco Bear - The Ultimate Entertainment Hub
- Louvre, Abu Dhabi
- **LEGOLAND Dubai**
- **Little Explorers**
- Mad Science UAE
- **Magic Planet**
- Mattel Play! Town
- **Mermaids of Arabia**
- Mission Play by Mattel
- Motiongate L.L.C.
- Mountain Extreme
- Murjan Splash Park
- Museum of Illusion
- NoWayOut Escape Rooms
- OliOli
- **Orange Hub**
- **Orange Seeds**
- **Orange Wheels**
- Phobia Dubai Escape Games
- Playville Dubai
- **PlayDXB**
- Psynix
- Ready Set Go!
- **Reel Cinemas**
- Rock Republic Dubai
- Rush Racing eSports
- **SeaWorld**
- Al Montazah Parks Sharjah
- **Ski Dubai**
- **Skyzone (Apparel Group)**
- **Snow Abu Dhabi**
- Stay N Play
- Street Maniax - Adventure & Trampoline Park Dubai
- **Teamlab Phenomena**
- The Smash Room
- **Topgolf Dubai**
- **Trampo Extreme**
- **VOX Cinemas**
- **Warner Bros. World Yas Island**
- **Woohoo**
- XQuarry
- **Xstrike**
- **Xtreme Zone**
- **Yalla Bowling**
- **Yas Waterworld**
- **Zone Amusement Arcade LLC**



The Sheikh Zayed Grand Mosque



Burj Khalifa



Yas Island



Dubai Frame



Yas Bay Waterfront



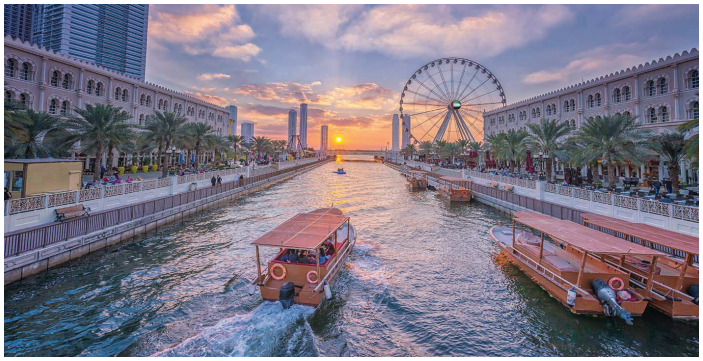
Global Village



Ain Dubai



Dubai Opera



Qanat Al Qasba, Sharjah



Al Montazah Parks



Louvre Abu Dhabi



Museum of Illusions, Dubai



Museum of the Future



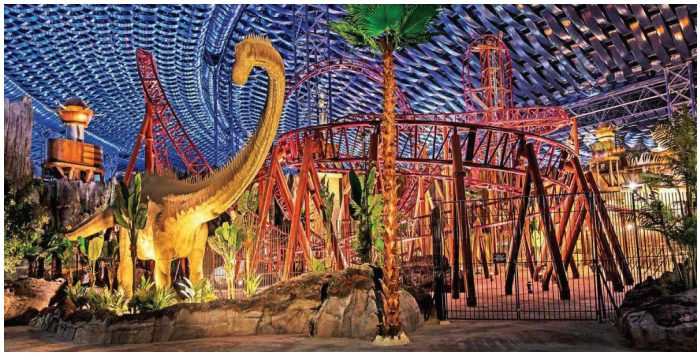
Al Ain Zoo



Dubai Safari Park



Dubai Parks and Resorts



IMG Worlds of Adventure



Motiongate, Dubai



SeaWorld Abu Dhabi



Warner Bros. World Abu Dhabi



Ski Dubai, Mall of the Emirates



Snow World Abu Dhabi



Aquaventure Waterpark, Atlantis The Palm



Surf Abu Dhabi



Jungle Bay Waterpark, Dubai



Murjan Splash Park, Abu Dhabi



Fujairah Aqua Bounce



Fun City



Magic Planet, Dubai



Fabyland, Dubai Festival City Mall



Mission Play by Mattel, The Galleria Al Maryah Island, Abu Dhabi



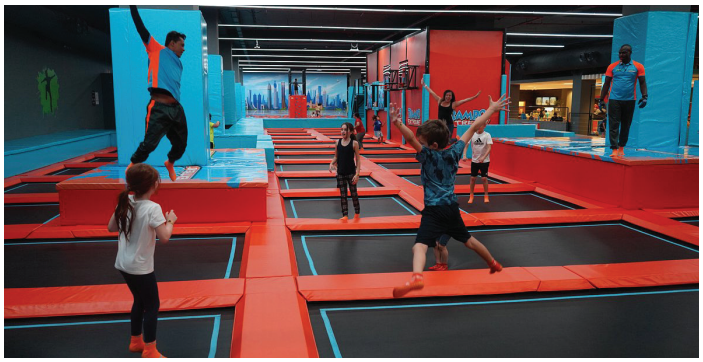
The Zone, Circle Mall, Dubai



Orange Wheel, Reem Mall



Boo Boo Laand, Dubai Mall



Trampo Extreme, Dubai



Air Maniax Dubai - Inflatable and Adventure Park



Ifly Dubai



Battleworld JVC, Dubai



Brass Monkey Dubai



House of Hype, Dubai Mall



teamLab Phenomena



Jais Adventure Park



Jebel Jais



XQuarry, Sharjah



بان
BAAN
ENTERTAINMENT

Sparkys

Sparkys Jump

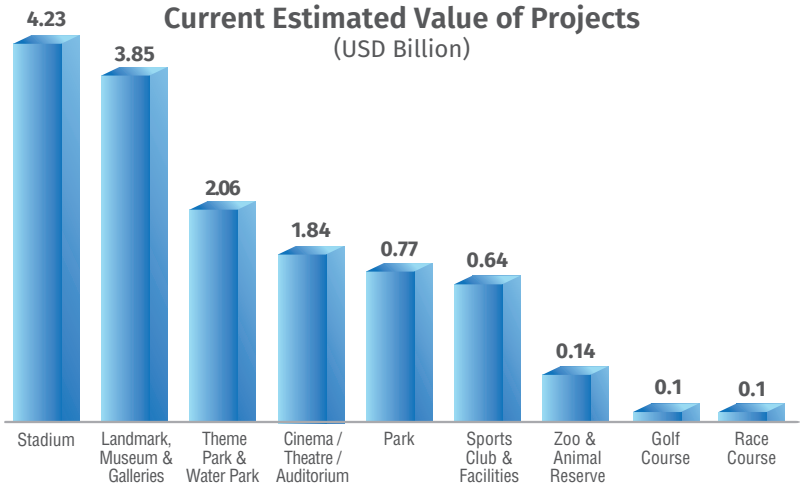
MISSION: PLAY! by Mattel

Bowling Center FLASH مركز بولينغ فلاش

Upcoming Mega Projects at a Glance

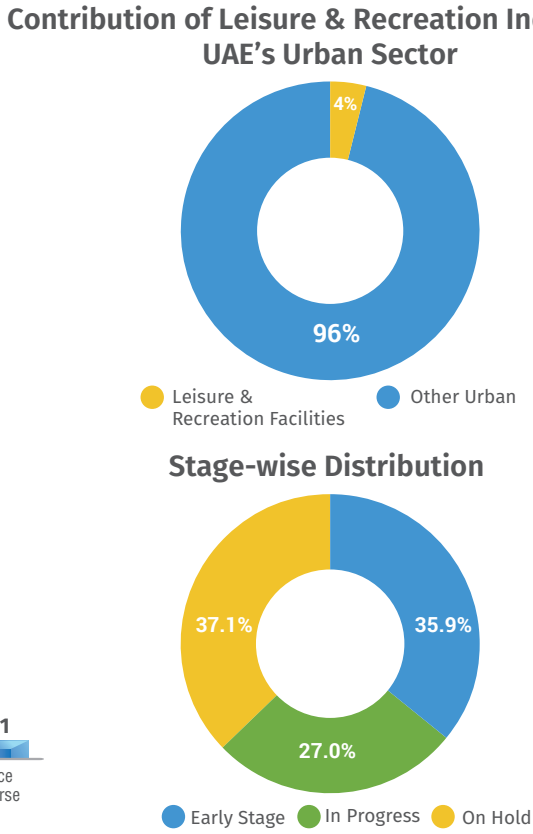
The UAE has successfully positioned itself as a premier and one of the globally leading leisure and entertainment destinations. Mega-developments such as Yas Island in Abu Dhabi – home to Ferrari World, Yas Waterworld and soon the first-ever Disney theme park and waterfront resort in the MENA region as part of Miral's collaboration with The Walt Disney Company – Dubai Parks & Resorts and IMG Worlds of Adventure exemplify this growth. While indoor attractions, such as Dubai Aquarium and Ski Dubai, are integral to this ecosystem. The UAE's retail landscape is equally impressive, with major developers such as Emaar and Majid Al Futtaim, behind mega development including Dubai Mall and Mall of the Emirates add further dynamism to an already exciting landscape.

Upcoming leisure and entertainment projects in the UAE are vital to further diversify the economy, foster innovation, create more jobs opportunities, thereby solidifying the UAE's position as a leading global destination for tourism, hospitality and entertainment.



Source: BNC

Complementing these attractions, the UAE boasts world-class infrastructure, state-of-the-art airports and renowned airlines, enhancing accessibility and appeal for international tourists. This strategic combination of entertainment, retail and transportation infrastructure solidify the UAE's position as a global tourism hub.



Azizi Opera House - Azizi Venice

Value: USD 100 million
Stage: Under Construction
Developers: Diriyah Gate Development Authority
Main Contractor: Gardinia Contracting
Description: The Opera House will feature a seating capacity for 2,000 guests and offer the flexibility to host both public performances and private gatherings. Set against the stunning backdrop of a Crystal Lagoon, encircled by a mesmerizing fountain, the venue ensures every event is imbued with an enchanting ambiance. The Opera House will be set apart by its adaptive boulevard, which will transform seasonally: open-air during the milder winter months and glass-covered to offer respite from the summer heat. This boulevard will have premium luxury boutiques, vibrant nightlife spots and top-tier restaurants, enhancing the visitor experience.
Completion: Q4 2028



Al Jubail Island - Abu Dhabi

Value: USD 2.7 billion
Stage: Under Construction
Developers: LEAD Developments
Description: This luxury project will span 2,800 hectares, offering F&B outlets and a wide range of facilities, including a beach club, a business centre, a sports centre, schools, supermarkets, nurseries, a community club, specialised clinics and other commercial establishments, and will be home to more than 10,000 residents.
Completion: Q4 2027



Wynn Al Marjan Island - Ras Al Khaimah



Value: USD 5.1 billion
Stage: Under Construction
Developers: Marjan, RAK Hospitiality Holding, Wynn Resorts
Description: Wynn Al Marjan Island is designed to offer 1,542 hotel rooms and 22 private villas, a 20,900 square metre (sqm) main casino and an additional "sky gaming casino" located on the 22nd floor, 22 restaurants and 15,000 sqm of retail space. 7,500 sqm dedicated to conventions and events.
Completion: Q1 2027

Al Nawras Island - Abu Dhabi



Value: USD 280 million
Stage: Under Construction
Developers: Hilton
Description: Al Nawras Island in Abu Dhabi is an upcoming ultra-luxury resort developed under Hilton's LXR Hotels & Resorts brand. This all-villa resort is designed to feature 80 beach and water villas, along with a 450-sqm two-bedroom royal villa. The resort aims to offer an exclusive and immersive experience, blending natural beauty with architectural elegance.
Completion: Reportedly 2025

Guggenheim Abu Dhabi (GAD) - Cultural District



Value: USD 1.4 billion
Stage: Under Construction
Developers: Tourism & Culture Authority, Guggenheim Foundation, Tourism Development & Investment Co. (TDIC)
Main Contractors: JV of Trojan General Contracting and Belhasa Six Construct
Description: The project involves the construction of a 41,800 sqm museum surrounded almost entirely by water. The museum will include 18,000 sqm of exhibition space, 13,000 sqm of gallery space, a 350-seat theatre, a research centre, classrooms, a conservation laboratory, a library, several food and beverage options and a retail outlet. The galleries will comprise four levels around a central atrium and connected by glass bridges. The museum will also house art, dating from the 1960s to the present day.
Completion: Q2 2025

Dubai Mountain Summit Complex - Hatta Development Plan



Value: USD 300 million
Stage: Tender
Developers: Dubai Municipality, EDF Renewables Group, Dubai Electricity & Water Authority (DEWA)
Description: The project involves the development of a Dubai mountain Summit Complex at an altitude of 1,300 metres. It includes the construction of a 5.4-km cable car and luxury hotels to transport tourists to the summit of Um Al Nesoor. The cable car route passes over the Hatta Dam lake and the upper dam lake, which are parts of the Hatta pumped-storage hydroelectricity plant currently under construction, as well as over the mountains. The project features three main stops: a departure station, intermediate stop and a top station.
Completion: Q4 2028

Therme Dubai

Value: USD 545 million
Stage: Announced
Developers: Therme Group
Description: Islands in the Sky will be located in Zabeel Park. With capacity to welcome 1.7 million annual visitors, the wellness resort will span 500,000 square feet with a 100-metre-tall structure. Highlights in the new attraction will include botanical gardens suspended from the air, stacked terraces and cascading pools where guests can enjoy restorative thermal and mineral waters.
Completion: 2028



The Second Sphere - Abu Dhabi

Value: USD 1.5 billion
Stage: Concept
Developers: Department Of Culture And Tourism, Sphere Entertainment
Description: The project involves the construction of an entertainment complex in Abu Dhabi. Situated in a prime location in Abu Dhabi, the project is expected to become a year-round attraction for both residents and international visitors, which stands 112 metres tall and accommodates 20,000 people. The project aligns with Abu Dhabi's Tourism Strategy 2030, enhancing its profile as a hub for culture and innovation.
Completion: Q4 2028



Jebel Ali Beach Development

Value: USD 300 million
Stage: Design
Developers: Nakheel, Dubai Municipality-General Projects Department
Description: The Jebel Ali public beach project spans 6.6 km, offering a unique blend of recreation, eco-tourism and environmental preservation across 330 hectares. It includes a 5 km sandy beach, a 1.6 km mangrove beach, and areas for swimming, diving and marine activities. Divided into three zones—The Pearl (family recreation), The Sanctuary (conservation-focused activities) and The Nest (educational eco-tourism)—the beach features turtle habitats, mangrove planting and biodiversity initiatives. Amenities include play zones, sports areas, restaurants and integrated infrastructure, supporting sustainability and Dubai's eco-tourism goals while preserving local ecosystems.
Completion: Q4 2029



Dubai Square Mall - Dubai Creek Harbor

Value: USD 2.7 billion
Stage: Under Construction
Developers: Emaar Properties PJSC, Dubai Holding
Main Contractor: Dutco Balfour Beatty
Description: Dubai square will have 750,000 sqm of gross floor retail space, which is nearly more than twice the gross leasable area of the Dubai Mall. The project will offer around 1,500 hotel rooms and over 1,000 apartment units. It is spread across three levels, each presenting a unique set of experiences to the customer. The mall will include dedicated streets, plazas, and a glass roof, skylights and shopfront windows which will give it an impression of an indoor city. It will have industrial themed sections as well as traditional Arabic architecture in other parts. Along with that, a Chinese city named Chinatown is planned for the development.
Completion: Q2 2030



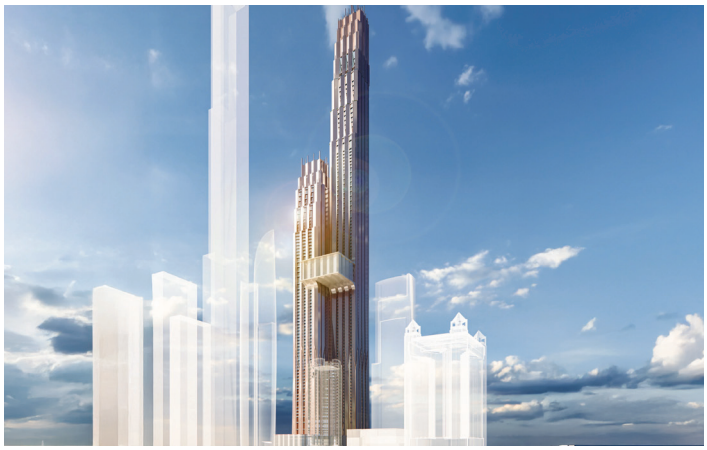
Burj Azizi

Value: USD 1.5 billion
Stage: Under Construction
Developers: Azizi Developments, Dubai Municipality - General Projects Department, Meydan LLC
Main Contractor: Gardinia Contracting LLC
Description: The project involves the construction of a mixed-use tower standing 725 metre high comprising 131 floors consisting of office and retail spaces. The project will include a seven-story shopping mall, a grand ballroom and a beach club. Noteworthy attractions feature a sky deck and recreational areas crafted for unmatched experiences. It boasts several world records, such as the highest hotel lounge, leisure club, observation deck, restaurant and hotel room in Dubai, located on the 126th, 130th, 122nd and 118th floors, respectively. Additionally, the tower will offer a range of upscale dining and beverage options. The project also include serviced residences, a boutique hotel offering 444 serviced apartments and residential villas.
Completion: Q2 2028



Corinthia Dubai - Sheikh Zayed Road

Value: USD 1.5 billion
Stage: Design
Developers: Dubai General Properties, Corinthia Hotels Limited
Description: Rising over 500 metres on Sheikh Zayed Road near the Museum of the Future, this iconic twin-tower development will include the 102-storey Corinthia Dubai hotel and branded residences. Designed with striking contemporary architecture, it will offer luxury apartments, serviced penthouses, rooftop pools and the world's highest outdoor sky pool. The project features panoramic views of Dubai landmarks, five-star hospitality, exclusive wellness facilities and lush green spaces. Residents and guests will enjoy a private members' club, bespoke concierge services and multiple fine dining venues. With 330,000 sqm of built-up area, this prestigious address is set to become a defining feature of Dubai's skyline.
Completion: Q4 2030





Skydiving over The Palm Jumeirah, Dubai

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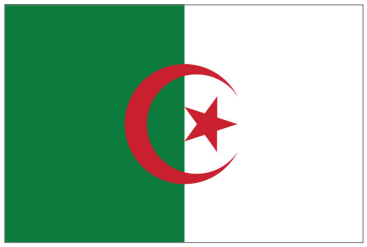
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Djamaa el Djazaïr, The Great Mosque of Algiers



REPUBLIC OF ALGERIA

Algeria is a key player in regional trade and global energy security due to its vast natural resources. Despite economic challenges, it shows potential for diversification and growth, particularly in the non-hydrocarbon sectors.

Geography

Algeria is located in North Africa, bordered by Tunisia, Libya, Niger, Mali, Mauritania, Western Sahara and Morocco. It has a vast Mediterranean coastline stretching over 1,600 km, making it a key player in regional trade. The country's geography is diverse, featuring the Atlas Mountains in the north, the vast Sahara Desert covering more than 80% of its land and fertile coastal plains that support agriculture and urban development. Major cities include the capital, Algiers, Oran and Constantine.

Historically, Algeria has a rich and complex past. It was part of the Carthaginian, Roman and Ottoman empires before becoming a French colony in 1830. The country fought a war of independence from 1954 to 1962, leading to its liberation and the establishment of the modern Algerian state. The legacy of French rule remains evident in the country's legal, educational and economic systems. Since independence, Algeria has experienced periods of political and economic challenges, including civil unrest in the 1990s. However, it has remained a key regional power.

Strategically, Algeria holds a significant position due to its location and natural resources. It is one of the world's leading producers of natural gas and oil, supplying energy to Europe, making it a crucial player in global energy security. Additionally, its position in the Maghreb region and proximity to Europe enhance its geopolitical influence.

Population

According to the World Population Review, Algeria's population stood at 46.8 million in 2024, up from 46.2 million in 2023, and is projected to reach 50.2 million by 2030. The median age in Algeria is 28.9 years.



Chapelle de Santa Cruz, Oran, Algeria



Algeria at a Glance

Official Name	People's Democratic Republic of Algeria
Land Area	2.4 million square kilometres (sq km)
Capital	Algiers
Government	Presidential republic
President	Abdelmadjid Tebboune
Population (2024)	46.8 Million
Population Density	19.7 per sq km
Population Growth	1.6%
Nationality Split	Arabs and Berbers (99%) Europeans of French, Spanish and Italian descent (1%)
GDP (2023)	$248 Billion
GDP Per Capita (2023)	$5,364
GDP Growth (2023)	4.1%
Inflation – Consumer Prices (2023)	9.3%
Industries	Agriculture and forestry, food processing, light industries, mining, natural gas, petrochemical, petroleum, tourism
National Day	July 5, 1962
Official Languages	Arabic and Tamazight
Dominant Religion	Islam
Currency	Algerian Dinar
Time Zone	Central European Time (CET)
Calling Code	+213

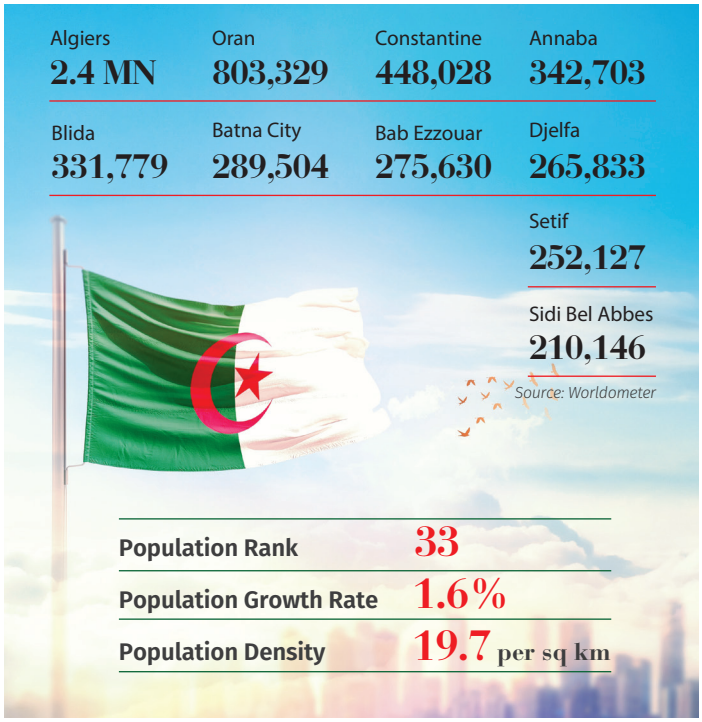
Sources: World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	4,633,000	2,364,600	2,268,400
5 – 9	5,020,000	2,560,300	2,459,700
10 – 14	4,545,400	2,320,700	2,224,700
15 – 19	3,658,300	1,869,800	1,788,500
20 – 24	2,901,700	1,477,300	1,424,400
25 – 29	3,044,900	1,566,000	1,478,900
30 – 34	3,494,800	1,803,500	1,691,300
35 – 39	3,709,300	1,903,700	1,805,600
40 – 44	3,554,700	1,829,100	1,725,600
45 – 49	2,978,300	1,527,900	1,450,400
50 – 54	2,493,800	1,275,100	1,218,700
55 – 59	2,086,700	1,065,700	1,021,000
60 – 64	1,612,200	823,700	788,500
65 – 69	1,231,300	617,800	613,500
70 – 74	891,700	443,100	448,600
75 – 79	496,400	230,300	266,100
80+	462,173	195,877	266,296

Source: World Population Review

Population Per City (2024)



Sources: World Population Review

Economy

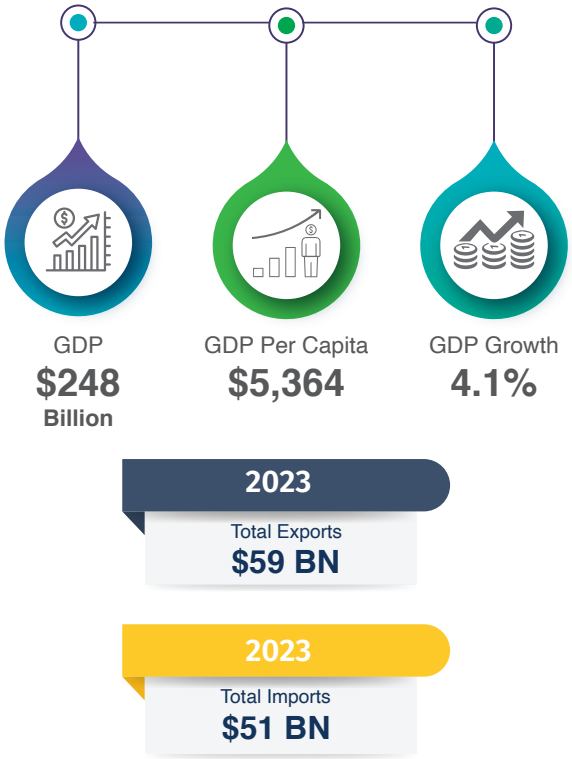
According to the World Bank, Algeria's economy is primarily fuelled by the oil and gas sector, along with public sector expenditures. Between 2019 and 2023, oil and natural gas contributed 14% to GDP, accounted for 86% of total exports and generated 47% of the country's budget revenues. Hydrocarbon products continued to dominate Algeria's exports in 2023, accounting for over 90% of total product exports. However, non-hydrocarbon exports have seen significant growth, tripling since 2017 to reach 2% of GDP, or $5.1 billion, in 2023. Fertilisers, iron and steel products and cement make up more than 80% of these exports. As a result, export diversification remains limited, with most exports concentrated in a few markets and supported by subsidised inputs. Despite this, Algeria has substantial potential for economic diversification and export growth, particularly given its strategic proximity to Europe.

Inflation eased to 4.1% in the first half of 2024, down from 9.3% in 2022 and 2023, driven by stabilising fresh food prices, moderating import costs and a stable exchange rate. As seen in many comparable economies, lower inflation, especially in food prices, has likely strengthened household purchasing power, benefiting the most vulnerable populations.

Economic activity remained strong in the first quarter of 2024, with data indicating sustained non- hydrocarbon growth in the second quarter as well. Agricultural output remained stable, as increased rainfall in the eastern regions offset drier conditions in the west. GDP growth is projected to slow down in 2024 due to reduced oil production in line with Algeria's Organization of the Petroleum Exporting Countries (OPEC) quota, despite increased public spending. However, growth is expected to accelerate in 2025, supported by a full recovery in agricultural output, continued expansion in non-hydrocarbon sectors and a rebound in oil production.

Fluctuations in hydrocarbon prices and markets remain the biggest risk to Algeria's macroeconomic outlook. Additionally, recent droughts and forest fires highlight the country's vulnerability to climate change. To drive sustainable, private sector-led growth and job creation, accelerating structural reforms aimed at improving the business environment and diversifying the economy are essential.

State of Economy Highlights (in 2023)

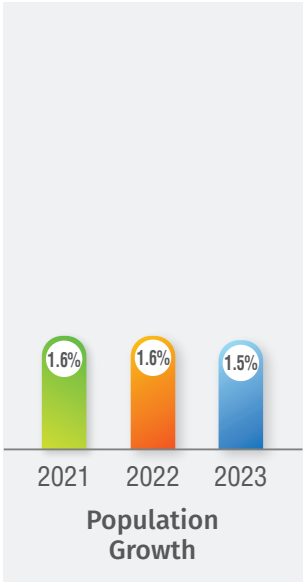


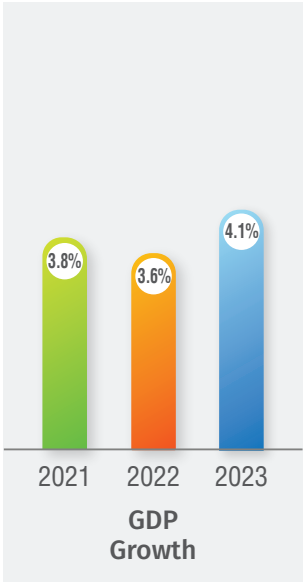
Sources: World Bank & CIA The World Factbook

Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	3.1%	3.8%	3.3%
CPI Inflation (Average)	4.0%	4.9%	4.4%

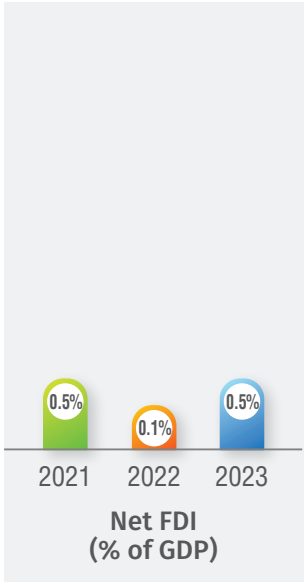
Source: IMF

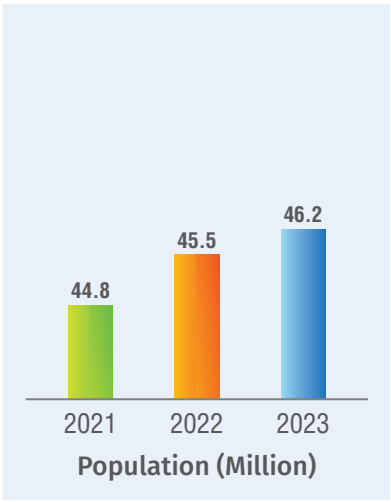
Key Macroeconomic Highlights

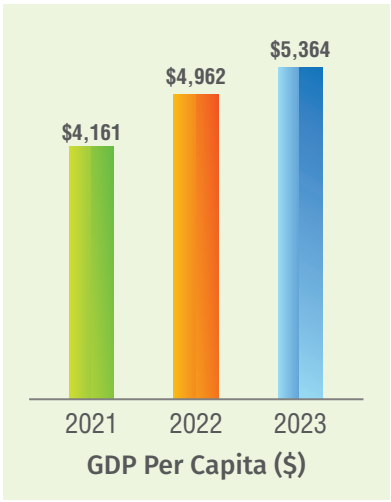


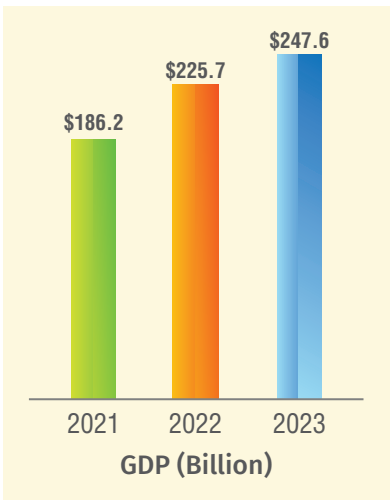






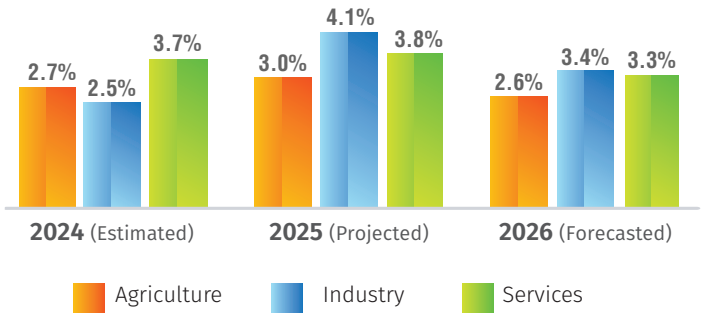






Sources: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

Growth Estimates (% of GDP)

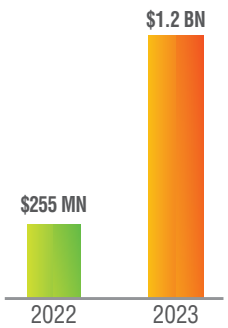
	2024	2025 (Estimated)	2026 (Forecasted)
Export of Goods & Services			
Hydrocarbon Exports	18%	16.4%	15.3%
Nonhydrocarbon Exports	3.6%	3.7%	3.7%
Import of Goods & Services	22%	22.4%	22.4%

Source: World Bank

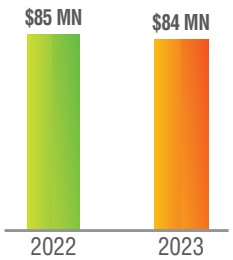
Investment

What comes as proof of the restored confidence among investors, by the end of 2024, the Algerian Investment Promotion Agency (AAPI) recorded over 11,780 investment projects nationwide, representing a significant financial commitment exceeding $36 billion and the potential creation of approximately 285,000 jobs. Among these projects, 218 involved foreign investments, including 82 foreign direct investments (FDI) and 136 joint ventures, highlighting Algeria's growing attractiveness to both local and international investors. According to CEIC data, Algeria's FDI increased by $360 million, accounting for 0.5% of the country's nominal GDP, during the first quarter of 2024.

Annual FDI Inflow



Annual FDI Outflow



Source: World Investment Report 2024

Algeria Vision 2030

Algeria's Vision 2030 is a strategic framework aimed at fostering economic diversification, sustainable development and improved governance. The plan seeks to reduce the country's reliance on hydrocarbons while strengthening key sectors such as industry, agriculture and services.

- **Economic Diversification:** Reduce oil and gas dependency by increasing non-hydrocarbon exports and promoting industrial growth.
- **GDP Growth:** Aim for an annual 6.5% growth rate in non-hydrocarbon GDP from 2020 to 2030.
- **FDI:** Strengthen Algeria's appeal to international investors by improving the business environment.
- **Employment Generation:** Expand private-sector job opportunities and reduce youth unemployment.
- **Public Governance:** Implement reforms to enhance transparency and efficiency in government operations.
- **Education & Human Capital:** Reform the education system to align with market needs and improve workforce skills.
- **Sustainable Development:** Invest in renewable energy, land development and infrastructure to ensure long-term economic stability.

Key Goals at a Glance

- **Increase non-hydrocarbon exports to $29 billion (from $5.1 billion in 2023).**
- **Develop renewable energy capacity, targeting 15,000 MW of solar power.**
- **Strengthen regional trade, leveraging Algeria's proximity to Europe and Africa.**
- **Enhance quality of life.**



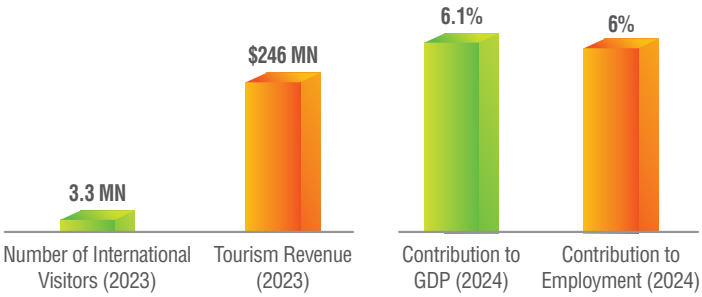
Sunrise at the Mediterranean port of Algiers, Algeria

Algeria Tourism Sector

According to the World Travel and Tourism Council, the direct contribution of the travel & tourism sector to Algeria's GDP was $4.58 billion in 2023, accounting for 2.1% of the GDP. This number is forecasted to grow by 2.7% annually to $6.44 billion, accounting for 2.4% of the GDP, from 2024 to 2034. In addition, international tourist arrivals are forecast to total 3.91 million generating expenditure of $300 million by 2034, an increase of 1.4% annually since 2024.

Having a direct impact on the leisure and entertainment industry, leisure travel spending in the country is expected to rise by 2.8% annually to $11 billion from 2024 to 2034. While business spending is also set to rise by 2.8% annually to $2.74 billion during the same period. Moreover, the Algerian government is taking steps to position the country as a tourist destination with an aim to attract 12 million foreign visitors by 2030.

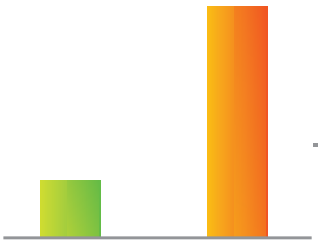
Tourism Index (2024)



Ranking in the World Travel and Tourism Development Index (2024)– **98**

Sources: WEF Travel and Tourism Development Index & Ministry of Tourism, Algeria

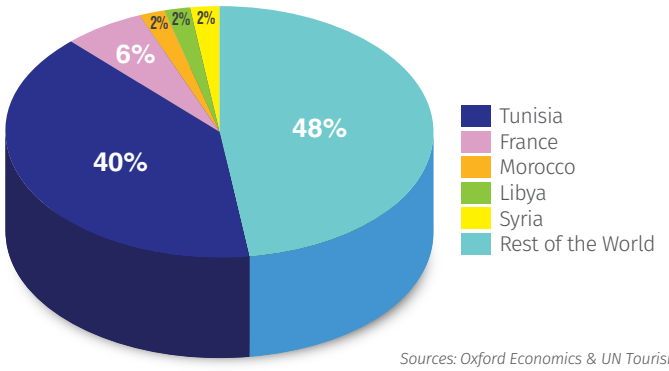
Tourist Footfall at a Glance



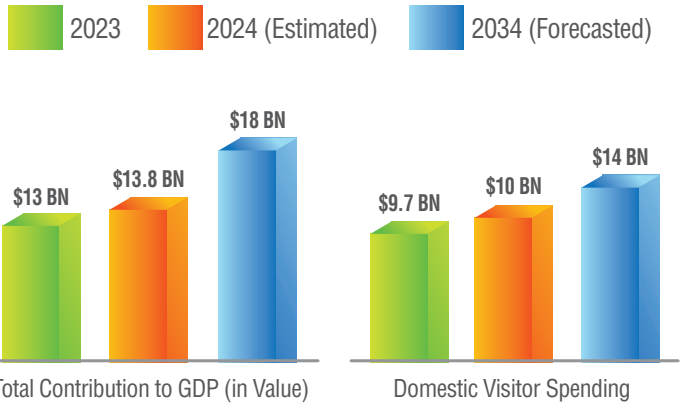
H1-2024 **800,000 Visitors**

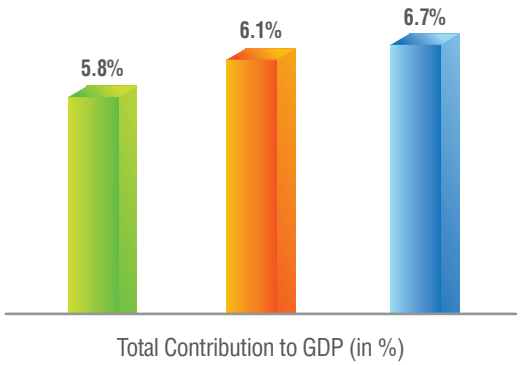
Source: Ministry of Tourism, Algeria

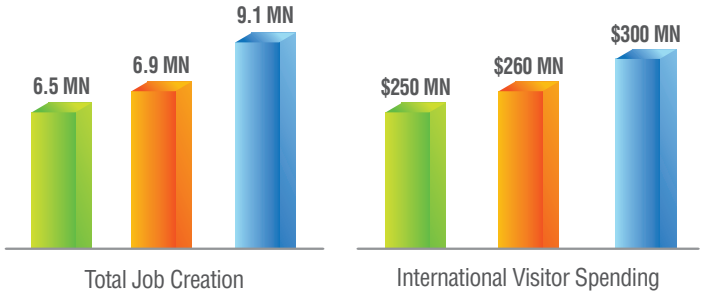
Inbound Arrivals



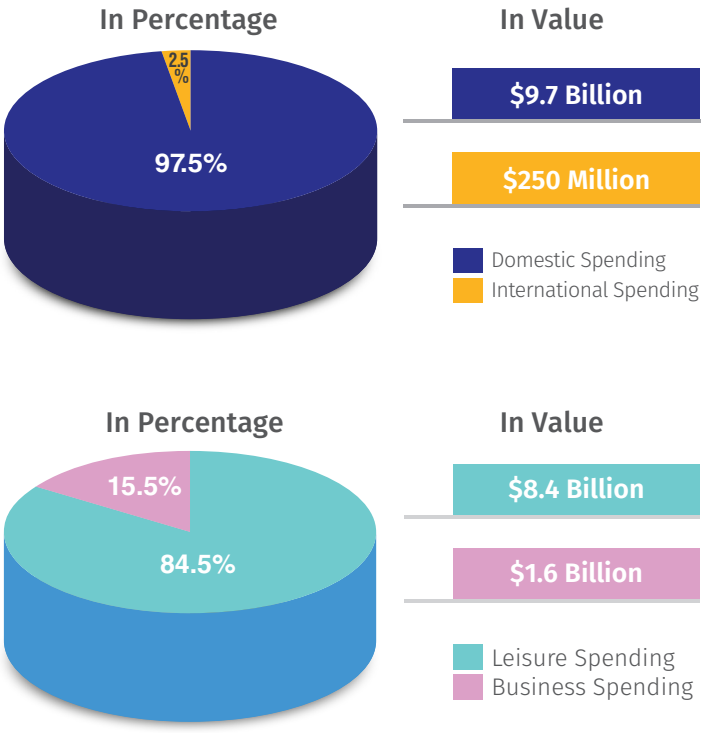
Sources: Oxford Economics & UN Tourism







Percentage Share of Total Spending (2023)



Source: World Travel & Tourism Council

Algeria Leisure & Entertainment Industry

Algeria's leisure and entertainment sector is diversifying, with a focus to expand the family entertainment centres (FECs), indoor amusement venues, theme parks and water parks landscape.

In Algiers, several prominent attractions cater to families and visitors. Kiddy Park, recognised as Algeria's first children's amusement park, features trampolines, swings and slides suitable for various age groups. Teri Park offers a variety of activities, including a 5D cinema and children's games. Dream Park, located in Mohammadia, provides a range of exciting rides and play areas, appealing to both children and adults. While Parc D'Attraction Ben Aknoun combines a zoo with an amusement park, offering educational and recreational experiences in one location.

Water parks are also gaining popularity. Aquafortland in Bordj El Kiffan includes water slides, pools and a spa, catering to all age groups. Kiffan Club, one of the largest water parks in the region, offers various aquatic attractions and relaxation areas. Additionally, a new water park in Sidi Abdellah is under development, aiming to provide interactive water play areas, a lazy river and slides for different age groups.

Key Leisure & Entertainment Operators

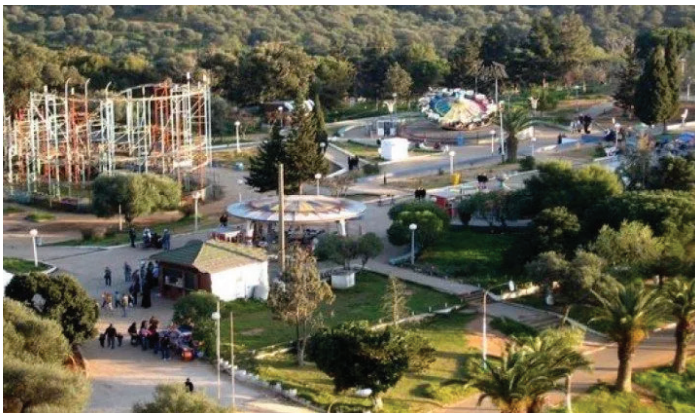
- Ben Aknoun National Park
- Dino Parc
- Dream Park
- El Boukaa Beach Water Park
- Escape Room Alger
- Farouk Land Park
- KIDDY PARK - Parc de Loisirs
- Kiddy Garden
- Kiffan Club
- King of games
- Kristel Park
- Laser Strike Dz
- Lazer Game Oran
- Leisure Park Lalla Setti
- Lompi Family Park
- Mostaland
- Paintball Forêt De Bainem
- Parc D'attraction Sabri Land
- Park Attraction Setifis
- Piscine Boulefkhad Water Park
- Teri Park



Aqua Fortland



Teri Park



Parc D'Attraction Ben Aknoun



Kiffan Club



Mostaland, Mostaganem



Laser Strike Dz

Upcoming Mega Projects at a Glance

With a target to attract 12 million tourists by 2030, Algeria has approved approximately 2,000 tourism projects, 800 of which are currently under construction. These initiatives encompass the development of new hotels, modernisation of existing accommodations and restoration of 249 historical sites to enhance cultural tourism offerings.

Further, Algeria is focusing on integrated urban projects such as Sidi Abdellah, designed to include commercial districts, leisure zones and residential areas, thereby creating holistic environments that cater to diverse needs.

Collectively, these developments underscore the country's commitment to transforming its tourism landscape by enhancing infrastructure, diversifying attractions and creating immersive experiences for visitors.

Cite Perla

Value: USD 250 million
Stage: Under Construction
Developer: Ets Kadri Promotion Immobilière
Main Contractor: Ets Kadri Promotion Immobilière
Description: The project involves the construction of 178 high-rise villas with a unique, refined and contemporary design, surrounded by green spaces and children's play areas. The project includes a children's nursery, gym, terrace with a swimming pool for each villa and central heating for each villa.
Completion: Q3 2025



Renewable Energy Development Programme

Value: USD 66 billion
Stage: Under Development
Developers: Sonelgaz
Description: Natural gas accounts for 96% of Algeria's 21,400 megawatts (MW) of installed capacity, with the remaining 4% comprising a combination of oil, solar, hydro and wind technologies. By 2028, however, the Commission for Energy and Gas Regulation (CREG), Algeria's energy regulator, projects total installed capacity will increase by nearly 45% to 36,000 MW. Under this proposed plan the share of natural gas would fall to 84%, while that of solar technologies would increase to 15% of installed generation capacity. These developments will help the tourism and leisure sectors to evolve in the coming years.
Completion: 2030



Sidi Abdellah

Value: NA
Developers: AADL (National Agency for the Improvement and Development of Housing)
Description: The project of 10,000 Sidi Abdellah dwellings occupies an area of 109 hectares. There are 332 blocks of buildings composed of Zones A, B, C and D. The construction area is 1 million square metres (sqm). The types of housing are mainly F3 (with an internal surface area of 70 sqm) and F4 (with an internal surface area of 85 sqm). There are three model heights, namely R+5 (6 storeys), R+9 (10 storeys) and R+14 (15 storeys). The project also includes sports and leisure park (Wilaya of Algiers) extending over 13 hectares and includes 10 units, amusement park, water park, football fields, sports and spa hotel, a large hotel with two large swimming pools, an ice rink, children's daycare centre and an equestrian centre. Some entertainment and leisure components are currently under development as part of the ongoing construction phases.
Completion: NA



New Béchar Stadium Complex



Value: USD 200 million
Stage: Ongoing
Developer: Ministry of Youth and Sport, Algeria
Description: This upcoming sports and leisure complex will feature a 25,000-seat football stadium, n athletics stadium with 6,500 seats, an Olympic swimming pool and a multi-purpose sports hall along with extensive parking facilities.
Completion: 2027

Dzair Media City - Ouled Fayet, Algiers



Value: Approx. USD 1.6 Billion
Stage: In Progress
Developers: Algerian government under the Ministry of Housing, Urban Planning and the City.
Description: Covering an expansive 74 hectares, the media city will encompass areas dedicated to media outlets, studios, an artists' village, educational and research spaces and a multi-service zone. Envisioned as Algeria's premier media and entertainment hub, Dzair Media City aims to foster the growth of the audiovisual sector, attract international media investments and offer state-of-the-art facilities for content creation.
Completion: Late 2025 or Early 2026

Forum al Djazair - Algiers Waterfront Mega Development



Value: NA
Stage: Phases 1 and 2 are underway, with a recent 18-month contract extension granted to Hill International
Developer: Hill International
Description: This expansive mixed-use development includes 4 residential towers with 22 stories each, waterfront apartments, retail outlets, 3 office towers, luxury villas and entertainment facilities. The Forum serves as Algeria's premier coastal tourist destination, featuring hotel towers, a marina and a business space.
Completion: NA



Stone bridges and old houses on the cliff at Constantine, Algeria



Sunset of Oran City, Algeria



The Grand Egyptian Museum, Giza



THE ARAB REPUBLIC OF EGYPT

Egypt's economy is undergoing significant transformation, driven by structural reforms, foreign investments and a growing tourism sector. While economic challenges persist, strategic reforms and foreign partnerships are expected to drive growth, job creation and long-term financial stability.

Geography

Egypt, located in northeastern Africa, is bordered by the Mediterranean Sea to the north, Sudan to the south, Libya to the west and Israel and the Red Sea to the east. Covering approximately 1 million square kilometres (sq km), much of Egypt consists of arid desert, including parts of the vast Sahara. However, the Nile River, the world's longest river, runs through the country from south to north, creating the fertile Nile Valley and Delta, which support most of Egypt's population. The Suez Canal, connecting the Mediterranean and Red Sea, is a crucial global trade route. Egypt has one of the world's most storied histories, dating back to ancient times. As the cradle of one of the earliest great civilisations, Egypt was home to the Pharaohs, who built monumental structures such as the Pyramids of Giza, the Sphinx and the temples of Luxor and Karnak. Ancient Egypt thrived for over 3,000 years before being conquered by the Persians, Greeks and Romans.

In the 7th century, Egypt became part of the Islamic Caliphate, introducing Arabic and Islam. It later fell under Ottoman rule (1517-1867) before becoming a British protectorate in 1882. Egypt gained independence in 1952, establishing a republic. It maintains its cultural and political leadership in the Arab world, with a rich heritage that blends ancient traditions with modern influences. Its strategic location, historic sites and economic significance continue to shape its role on the global stage.

Population

According to the World Population Review, Egypt's population stood at 117.28 million in 2024, up from 114.5 million in 2023, and is projected to reach 127.1 million by 2030. The country's median age is 24.1 years currently. Egypt has a high fertility rate, and its rapidly increasing population poses a threat to the economy since nearly a third of Egyptians live below the poverty line. Egypt is a diverse nation with Egyptians making up 91% of the population. Minority groups include Turks, Greeks, Abazis, Bedouins, Siwis and Nubians. Islam is the predominant religion, with 90% of the population being mainly Sunni Muslims, while Christians, including Copts, Catholics and Anglicans, make up 10%.

The country has a young demographic, with 62% of its people aged 15-64 and only 5% aged 65 or older. Egypt's labour force stands at 31.2 million, but unemployment, particularly among youth aged 15-24, is high at 7.2%. Approximately 90% of Egyptians reside in the Nile Valley and Nile Delta, which constitute just 8% of Egypt's total land area. Urbanisation stands at 43.1%.



Egypt at a Glance

Official Name	Arab Republic of Egypt
Land Area	995,450 sq km
Capital	Cairo
Government	Presidential republic
President	Abdel Fattah El-Sisi
Population (2024)	117.3 Million
Population Density	117.1 per sq km
Population Growth	1.62%
Nationality Split	Egyptian (99.7%) Others (0.3%)
GDP (2023)	$396 Billion
GDP Per Capita (2023)	$3,457
GDP Growth (2023)	3.8%
Inflation – Consumer Prices (2023)	33.9%
Industries	Agriculture, tourism, construction, mining, transportation, hydrocarbon production, trade
National Day	July 23, 1952
Official Language	Arabic
Dominant Religion	Islam (90%) Christianity (10%)
Currency	Egyptian Pound
Time Zone	Eastern European Standard Time (GMT+2)
Calling Code	+20

Sources: The CIA World Factbook, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	11,800,000	6,000,000	5,800,000
5 – 9	13,000,000	6,700,000	6,300,000
10 – 14	12,500,000	6,400,000	6,100,000
15 – 19	10,700,000	5,500,000	5,200,000
20 – 24	9,721,800	4,946,300	4,775,500
25 – 29	8,959,700	4,581,700	4,378,000
30 – 34	8,660,600	4,419,400	4,241,200
35 – 39	8,396,000	4,246,100	4,149,900
40 – 44	7,373,900	3,715,300	3,658,600
45 – 49	6,210,900	3,156,600	3,054,300
50 – 54	5,215,300	2,649,900	2,565,400
55 – 59	4,405,300	2,202,300	2,203,000
60 – 64	3,600,800	1,739,800	1,861,000
65 – 69	2,689,100	1,234,500	1,454,600
70 – 74	1,758,300	756,600	1,001,700
75 – 79	974,500	389,200	585,300
80+	540,521	188,446	352,075

Source: World Population Review

Population per City Snapshot (2024)



Source: World Population Review

Economy

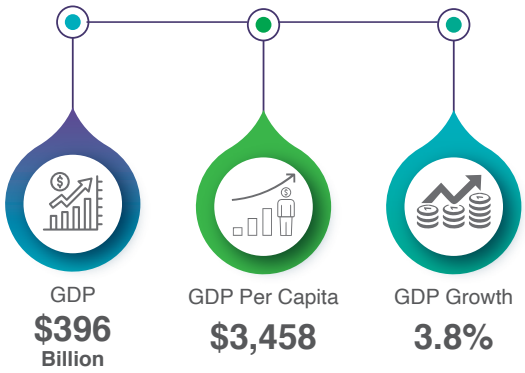
According to the World Bank, Egypt recorded a GDP Per Capita of $3,512.6 in FY23. The country's annual GDP growth declined from 3.8% in FY 2022/23 to 2.4% in FY 2023/24. The decline happened against the backdrop of persistent geopolitical tensions and global economic uncertainty, alongside the government's contractionary policies designed to restore macroeconomic stability with a strong focus on enhancing the governance of public investments as a key policy measure.

The monetary tightening and exchange rate adjustment in March 2024 contributed to alleviating Egypt's two-year-long foreign currency crisis. However, economic recovery remains vulnerable to risks stemming from the escalating Middle East conflict, which has disrupted key foreign income sources, particularly revenues from the Suez Canal, which saw a sharp decline of 68% during Q4-2024. Additionally, structural challenges, exacerbated by global economic shocks, continue to impact the manufacturing sector, Suez Canal operations and the energy industry.

Looking ahead, Egypt's economic growth is projected to recover gradually, rising from an estimated 2.4% in FY24 to 3.6% in FY25 and 4.2% in FY26, International Monetary Fund (IMF) indicates, supported by investments, including the UAE-backed Ras Elhekma project. However, the budget deficit is expected to widen from 3.6% of GDP in FY24 to 7.0% in FY25, driven by increased interest payments and the fading impact of the Ras Elhekma deal, before gradually declining with fiscal consolidation. External financing needs to remain substantial, including debt repayments and arrears to international oil companies, while a widening current account deficit could strain foreign currency reserves, IMF added.

Overall, the country holds significant economic potential, leveraging its manufacturing and services sectors, large domestic market and strategic location at the crossroads of Africa, Asia and Europe to attract both foreign and domestic investments. Having said that, unlocking growth, exports and job creation will require redefining the state's role to enable private sector growth, fostering a business-friendly environment and investing in human development to ensure long-term economic resilience.

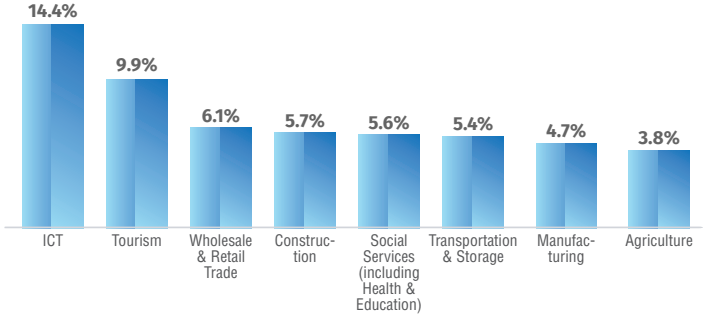
State of Economy Highlights (in 2023)





Sources: World Bank & CIA The World Factbook

Non-Oil Contribution to Real GDP – Q4 2024

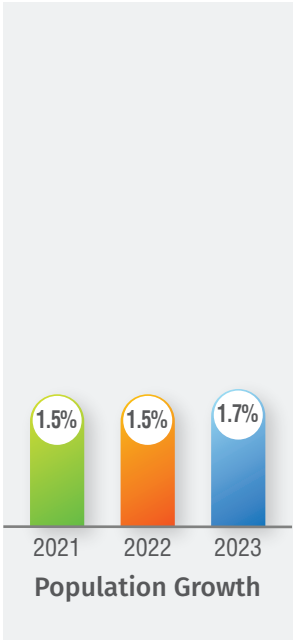


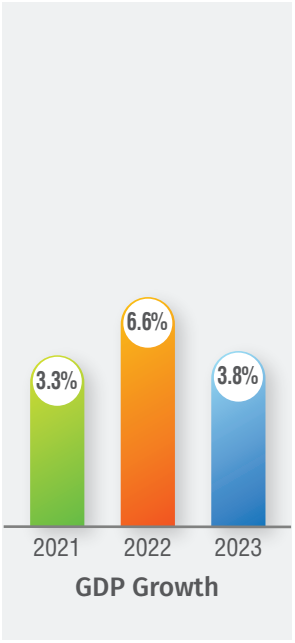
Source: Ministry of Planning, Economic Development and International Cooperation, Egypt

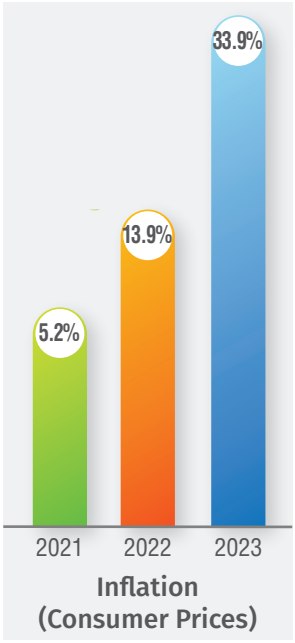
Indicators	2024 (Estimated)	2025 (Projected)
Real GDP Growth	2.4%	3.6%
CPI Inflation (average)	33.6%	17.2%

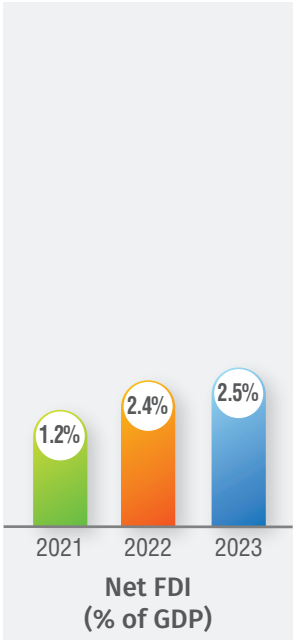
Source: Ministry of Planning, Economic Development, and International Cooperation, Egypt

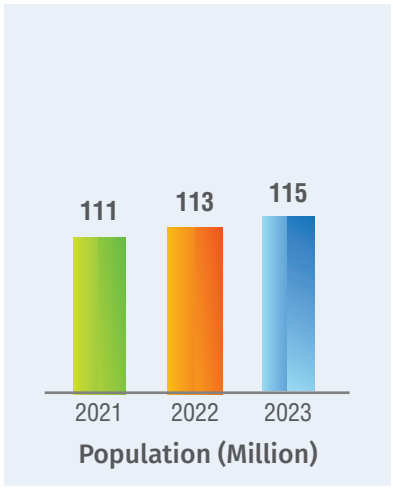
Key Macroeconomic Highlights

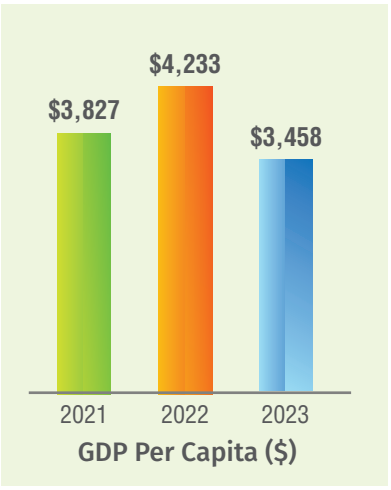


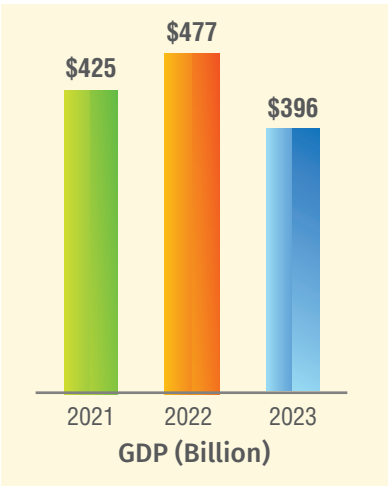












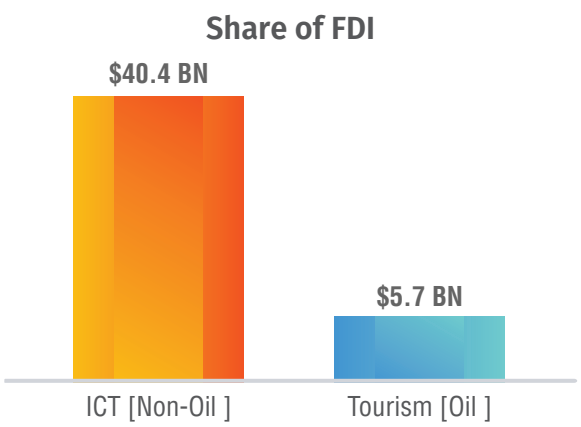
Source: World Bank

Investment

The country's foreign direct investments (FDI) reached $46.1 billion in 2024, up from $10 billion in 2023, shared Egypt's Ministry of Investment and Foreign Trade. The Ministry attributed this growth to the $35 billion UAE-backed Ras ElHekma deal, which played a pivotal role in boosting the country's investment landscape.



Recent data on FDI by source country is limited, although historical trends indicate that the UK has been a significant investor in Egypt. Among the Gulf nations, the UAE and Saudi Arabia have increasingly invested in various Egyptian sectors, particularly real estate and tourism. For example, the UAE's Modon Holding is leading the Ras ElHekma development, while there are indications of potential Saudi investments in projects such as the Ras Banas peninsula on the Red Sea coast.



Source: Central Bank of Egypt



Egypt Vision 2030

Egypt Vision 2030 serves as a blueprint for the nation's future, focusing on sustainability, social welfare and economic reform to position Egypt as a modern and resilient state. This comprehensive roadmap aims to achieve sustainable development across economic, social and environmental dimensions by 2030.

Key Highlights:

Economic Development:
The strategy aspires to establish a competitive, balanced and diversified economy driven by innovation and knowledge. It emphasises the importance of inclusive and sustainable growth, aiming to enhance the quality of life for all Egyptians.

Social Justice:
A core objective is to improve citizens' quality of life by promoting principles of justice, social integration and active participation in political and social spheres. The strategy underscores the need for equal opportunities and reducing development disparities.

Environmental Sustainability:
Egypt Vision 2030 focuses on creating a sustainable and diverse ecosystem. It highlights the efficient use of resources to ensure the rights of future generations and emphasises balanced regional development.

Key Goals at a Glance

- **Grow GDP rates**
- **Achieve 42% renewable energy in electricity generation by 2030.**
- **Increase women's participation in the labour force by 67.8% from its 2020 level by 2030.**
- **Create a New Administrative Capital (NAC), located 28 miles east of Cairo, designed to accommodate over six million people. The city will feature government offices, financial districts and various amenities, contributing to the nation's sustainable development goals.**

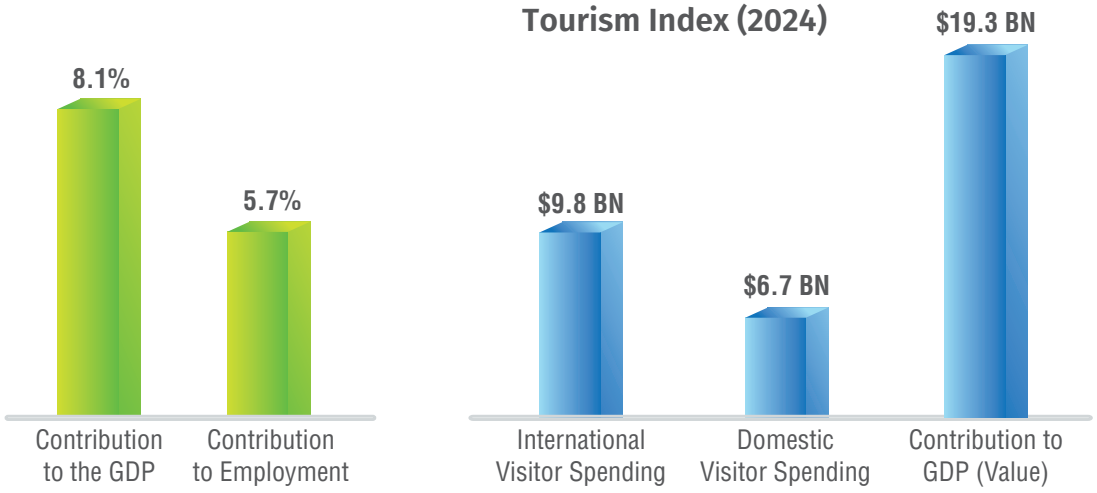
Government expenditure on recreation, culture & religion	2019 - 20	2025	2030
	3.2%	3.8%	4.3%



Nile River, Cairo

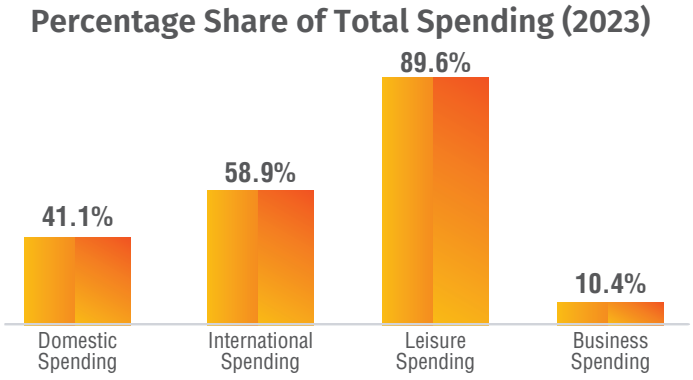
Egypt Tourism Sector

Egypt's National Strategy for Sustainable Tourism 2030 aims to attract 30 million tourists by 2028. Aligned with this goal according to the Central Bank of Egypt, tourism continues to be a key pillar of Egypt's economy, with revenues rising by 5.5%, reaching $14.4 billion in FY2023-24. This growth was driven by a 7.4% increase in tourist arrivals. For perspective, Egypt recorded more than 8 million in visitor footfall during the first seven months of 2024, indicated a JLL report. In addition, the number of overnight stays in accommodations, during the full year, expanded to 154.1 million, reflecting the sector's sustained momentum.

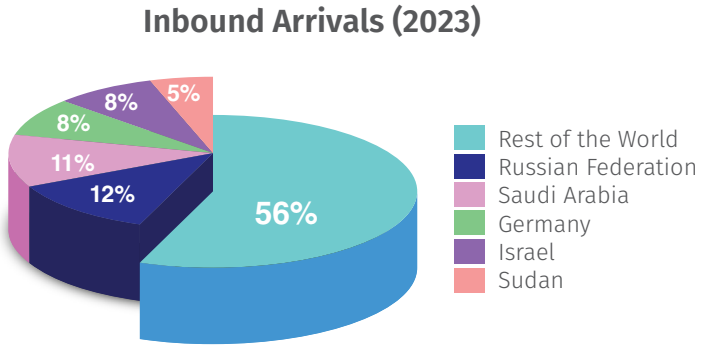


Ranking in the World Travel and Tourism Development Index
61

Sources: World Travel & Tourism Council, WEF Travel and Tourism Development Index



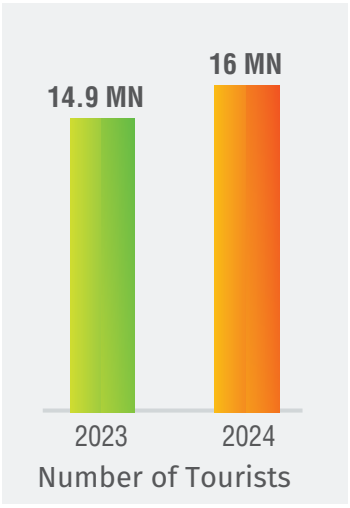
Sources: World Travel & Tourism Council

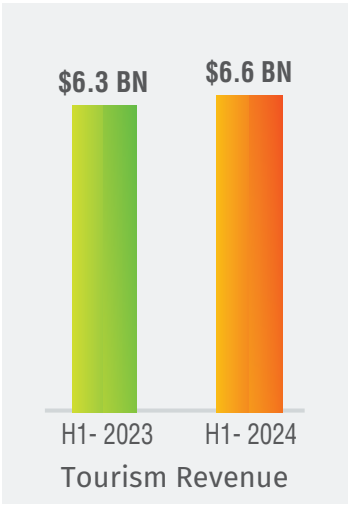


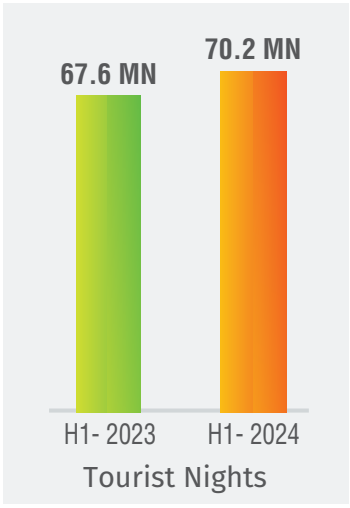
Sources: Oxford Economics, UN Tourism



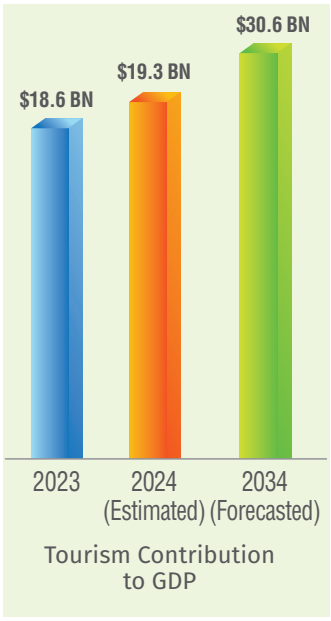
Tourists riding camels to Giza Pyramid Complex

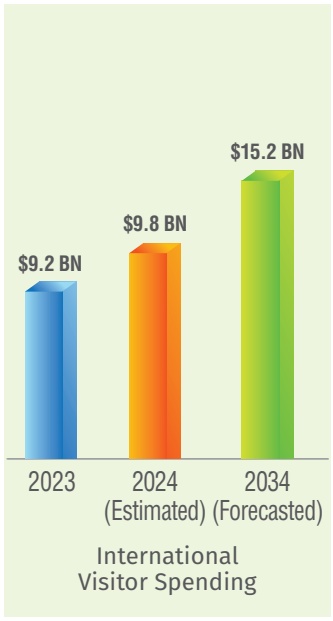


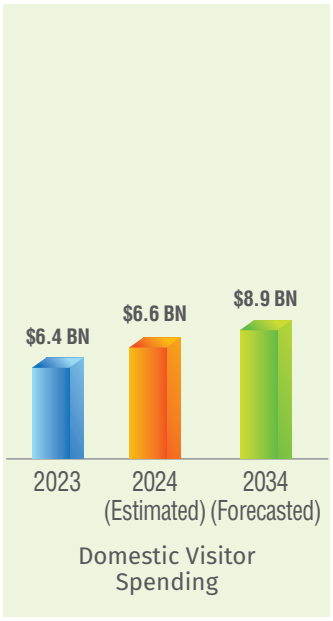


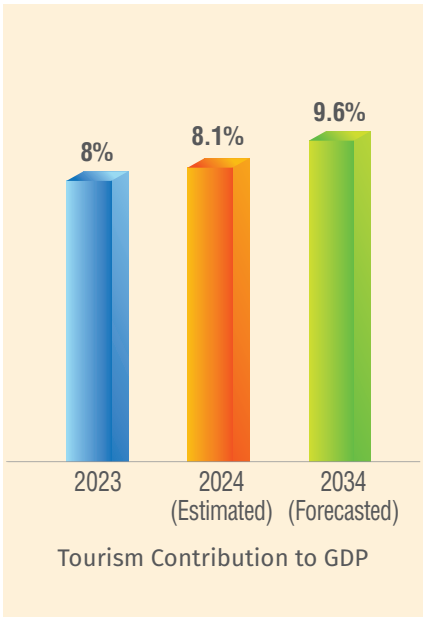


Source: Ministry of Tourism, Egypt









Sources: World Travel & Tourism Council

Cairo Hospitality Market – Q3-2024

Resort beach on the Red Sea, Sharm-el-Sheikh

Total Stock	Future Stock	ADR (year-to-date Aug 2024)	RevPAR (year-to-date Aug 2024)	Occupancy (year-to-date Aug 2024)
26,700 keys	1,200 keys	-3%	-11%	-5.4pp



Egypt Tourism Strategy 2030 at a Glance

As Egypt's tourist number declined due to challenges posed by the COVID-19 pandemic followed by the start of the Russia-Ukraine war, the country announced plans to attract 30 Million tourists by 2028.

Egypt's entertainment industry plays a vital role in the country's economy, encompassing key sectors such as arts, sports, media, culture and tourism. In 2023, the industry generated approximately $14.7 billion in revenue, with tourism accounting for the largest share at $13.2 billion. The cinema sector also saw significant growth, with revenues reaching $26 Million. However, ongoing economic and geopolitical challenges have taken a toll on the sector. According to the Central Agency for Public Mobilization and Statistics, visitor numbers to museums and cultural sites in the first quarter of 2024 dropped considerably compared to the 3.2 Million visitors recorded in 2023. Other social entertainment sectors, including cinemas, theatres, television, sports, music, restaurants, cafes, public parks, amusement parks and nightlife venues, also experienced a significant decline in profits.

Experts attribute this downturn to economic hardships, as many individuals prioritise securing their daily income, leaving little financial flexibility or time for cultural and artistic activities.

Great Sphinx of Giza



Egypt Leisure & Entertainment Industry

The leisure & entertainment, amusement and cinema sectors in Egypt are experiencing decent growth, despite the economic turmoil. Strategic investments in the leisure & entertainment market will contribute positively to the country's GDP. Although the cinema industry, once a cornerstone of Arab cinema, is facing challenges due to financial constraints and distribution issues, there is potential for revival through focused investments and storytelling. Overall, Egypt's strategic location, cultural heritage and ongoing reforms aim to position it as a growing hub for leisure & entertainment.

Key Leisure & Entertainment Operators (MENALAC Members in bold)

- Airzone Egypt - Point 90 Mall
- Al Fustat Garden
- Alexandria Zoo
- Aqua Coraya
- Aswan Marina Aqua Park
- Cleo Park Sharm El Sheikh
- Cosmocity
- Dolphina Park
- Edu-Zone STEAM Education Center
- El Gouna Cable Park Sliders
- El Malahy Amusement Egypt
- Energy Skate (Nasr City)
- Escape The Room Egypt
- Fun Kingdom
- Gravity Code
- Ice Rink
- Insomnia Egypt
- KidZania Cairo
- **Magic Planet - City Centre Almaza**
- Makadi Water World
- Monkey Maze
- Paradise Island Hurghada
- Placebo - Role Playing Escape Rooms
- Planet X
- Planeteroes
- PrimaSol Titanic Aqua Park
- Sherlocked Egypt
- Sindbad Aqua Park
- Sindbad Club
- **Ski Egypt**
- **Snow City**
- Taverna Aquacity
- TEDA Fun Valley
- The Jungle Aqua Park
- Trapped Egypt
- **Xtremeland**



Mini Egypt Park



El Malahy



Dream Park



Aqua Coraya



Sindbad Aqua Park



Dolphina Park



Ski Egypt



Snow City



Ice Rink



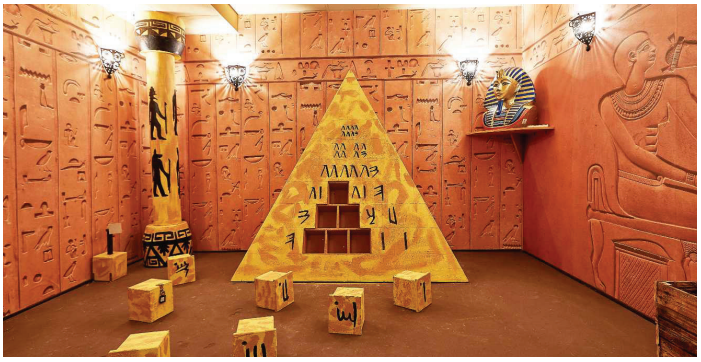
KidZania Cairo



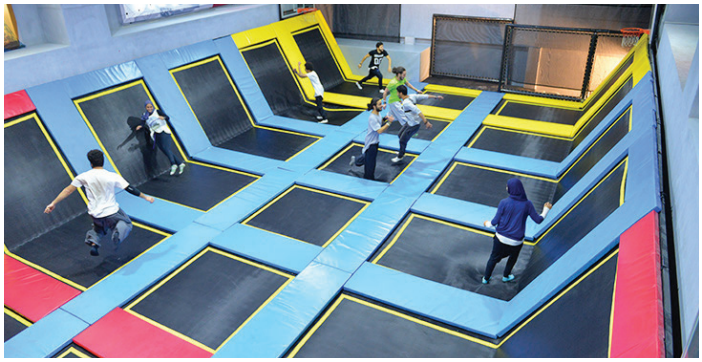
Magic Planet - City Centre Almaza



Xtremeland, Cairo



Escape The Room Egypt



Gravity Code



Planet X



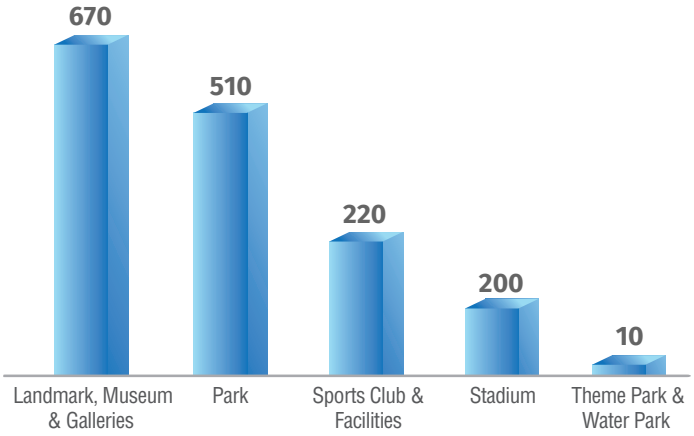
VSpace

Upcoming Mega Projects at a Glance

The tourism industry, a key pillar of the Egyptian economy, is experiencing a strong rebound, with government initiatives aimed at attracting 30 million tourists annually by 2028. Investments in new resorts, cultural attractions and luxury hospitality developments are enhancing Egypt's global appeal. The leisure and entertainment sector is evolving with a rise in theme parks, family entertainment centres and waterfront developments catering to both locals and tourists. Additionally, retail expansion is booming, with the growth of mega malls, mixed-use developments and international brand entries boosting consumer spending and real estate demand. Government-backed infrastructure projects, new tourism visas and digital transformation in retail and entertainment are expected to sustain long-term growth. While economic challenges persist, strategic reforms and foreign partnerships are expected to drive growth, job creation and long-term financial stability.

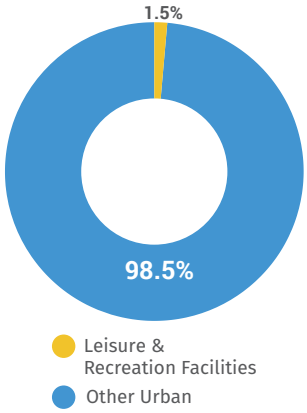
Egypt's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

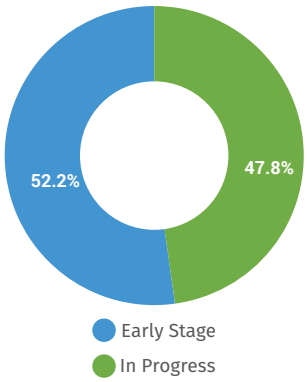


Source: BNC

Contribution of Leisure & Recreation Industry to Egypt's Urban Sector



Stage-wise Distribution



Fustat Hills Park

Value: USD 305 million
Stage: Under Construction
Developers: Ministry of Housing, Utilities & Urban Development (Egypt)
Main Contractor: Consortium of Redcon Construction Co. and Korra Energi
Description: The park will be built on 500 acres in the centre of historic Cairo and is set to be the largest in the Middle East and will be developed in five phases. It will house the National Museum of Egyptian Civilization, alongside the Ain El-Sira Lake, the Religions Complex and Amr bin El-Aas Mosque. A hill with a spectacular view of the pyramids, Giza Plateau, Salah El-Din Citadel and the Cairo minarets will be located at the heart of the park. The park will also have a heritage gardens area, an adventure area, a cultural area, a historical area, an Egyptian flower garden area and an entertainment centre.
Completion: NA



O West Club - 6th of October City

Value: USD 51 million
Stage: Under Construction
Developers: Orascom Development
Main Contractor: Red Sea Construction & Development
Description: 'O West Club' will be the biggest integrated sports and social club in West Cairo spanning across a 153,781 square metres (sqm) land plot. The club will include a main football pitch, five multi-sized sub-courts, multi-purpose courts for volleyball and basketball, tennis courts, Olympic swimming pools, gymnastics and battalion halls, at the level of sports facilities. In addition, there will also be private facilities for social, cultural and artistic activities and a hall that will be equipped to host artistic concerts, conferences and exhibitions. The club will cover 5% of the entire O West City.
Completion: Q1 2030



Underwater Military Museum

Value: USD 70 million
Stage: Concept
Developers: Red Sea Governorate, Ministry of Environment - Egyptian Environmental Affairs Agency
Main Contractor: Modern Building Leaders
Description: The initiative involves submerging 15 pieces of military equipment in the Red Sea's waters, each possessing significant historical narratives, at three designated locations in Hurghada: Shab Al-Saqala, Uruq Al-Tawil and Erq Jame.
Completion: Q4 2027



Oblisco Capitale

Value: USD 70 million
Stage: Concept
Developers: Al Nasr Developments
Description: Oblisco Tower is the first of its kind in New Administrative Capital, and in the whole world; Oblisco Capitale Tower New Capital height is about 1,000 sqm. Oblisco Tower consists of 250 floors with a variety of services, ranging from luxury hotel apartments, commercial markets and banks, to recreational areas such as amusement parks, cinemas, cafes, restaurants and various swimming pools inside The Tower Project.
Completion: NA



Ras El-Hekma

Value: USD 35 billion
Stage: Concept
Developers: New Urban Communities Authority - Abu Dhabi Developmental Holding Company Environmental Affairs Agency
Description: Covering an area of over 170 sq km, Ras El Hekma is set to include residential districts, prestigious international hotels, tourist resorts, expansive entertainment venues and essential service facilities such as hospitals, schools and universities. Additionally, it will feature a free economic zone for information technology industries and logistics hubs, a central business district to attract global companies and a large marina for tourist yachts and ships. An international airport south of the city is also planned, with the Abu Dhabi Development Holding Company developing the airport and Egypt receiving a share of its revenues. The new city is expected to attract 8 million tourists upon completion.
Completion: Q4 2030 (estimated)



Nile Boulevard

Value: NA
Stage: Concept
Developers: Nile Developments
Description: The project spans 29 feddans with an overall investment of $75 million. The development is a mixed-use venture, consisting of three residential phases and three commercial phases. The total projected sales for the entire Nile Boulevard project are expected to reach $240 million.
Completion: Q4 2026



SouthMED Development

Value: USD 21 billion
Stage: NA
Developer: Talaat Moustafa Group (TMG)
Description: It is a new global destination on the southern Mediterranean, spanning over 23 million sqm in a very prime location on the stunning Egyptian North Coast shoreline. SouthMED stands out for its diverse range of residential options, envisioned to suit every lifestyle. Leisure and entertainment facilities include a world-class marina, 18-hole signature golf courses, a state-of-the-art sports and athletics centre, a stunning 8km stretch of sprawling, pristine beach, swimmable lagoons, world-class shopping and entertainment.
Completion: NA



Al Galala City – Suez

Value: NA
Stage: Ongoing
Developer: Engineering Authority of The Egyptian Armed Forces
Description: The City of Galala is located on 17000 acres on top of the highest mount plateau in the area across the Gulf of Suez. The new city centres on a balanced approach towards development and preservation of the surrounding pristine environment. The first phase released, out of three, covers an area of 2,050 acres consisting of various activities. It includes residential areas with the most desired moderately priced units, including commercial units, touristic villages, cultural, medical, educational and religious spaces.
Completion: NA





Cairo Downtown and the Nile River



Luxor Temple Courtyard and the statues of Ramses II, Egypt



Night view of Milad Tower in Tehran, Iran



ISLAMIC REPUBLIC OF IRAN

Iran's trade, investment and tourism sectors in 2024-25 are experiencing notable developments. The country is actively investing in coastal tourism along the Persian Gulf and Caspian Sea, aiming to attract 15 million visitors by 2026. Notably, Iran Expo 2025 is set to showcase export capabilities, fostering international trade and investment. Additionally, non-oil exports to Kuwait increased by 34% over 10 months, indicating strengthening regional trade relations. However, economic challenges persist due to ongoing sanctions and geopolitical tensions.

Geography

The Islamic Republic of Iran is situated in southwestern Asia and characterised by its mountainous terrain and arid climate. It shares borders with countries including Turkey, Iraq, Azerbaijan, Armenia, Turkmenistan, Afghanistan and Pakistan, and has coastlines along the Caspian Sea, Persian Gulf and Gulf of Oman. Covering a total area of approximately 1.64 million square kilometres (sq km), Iran stands as the 17th largest country globally.

Historically, Iran is the heartland of the ancient Persian Empire, with its roots tracing back to the Achaemenid Empire founded by Cyrus the Great in the 6th century BC. This empire expanded from the Balkans to North Africa and into Central Asia, marking one of history's most extensive empires. Over the centuries, Iran witnessed the rise and fall of several dynasties, including the Parthian and Sasanian Empires, each contributing to the nation's cultural and political heritage. The 7th century Arab conquest introduced Islam, leading to significant cultural and religious transformations in the country. The Safavid dynasty in the 16th century established Shia Islam as the state religion, a defining feature of Iran's identity today.

Strategically, Iran's location has rendered it a pivotal player in regional and global geopolitics. Situated at the crossroads of the Arab, Turkish, Russian and Indian territories, Iran serves as a critical transit point connecting the Middle East, Central Asia and the Indian subcontinent. Its proximity to vital maritime routes, especially the Strait of Hormuz, a chokepoint through which a significant portion of the global oil shipments pass, amplifies its strategic importance. Iran's positioning has historically attracted both collaboration and contention from global powers, influencing its foreign policy and economic strategies. In recent times, Iran's vast reserves of natural resources, particularly petroleum and natural gas, have boosted its economic significance. However, geopolitical tensions, internal political dynamics and economic sanctions have posed challenges to its development.



Azadi Tower, Tehran, Iran



Iran at a Glance

Official Name	Islamic Republic of Iran
Land Area	1.64 Million sq km
Capital	Tehran
Government	Theocratic Republic
Supreme Leader	Ali Khamenei
Population (2024)	91.6 Million
Population Density	56.2 per sq km
Population Growth	1.02%
Nationality	Iranian
GDP (2023)	$404.6 Billion
GDP Per Capita (2023)	$4,466
GDP Growth (2023)	5.0%
Inflation – Consumer Prices (2023)	44.6%
Industries	Automotive, Cement, Chemical & Petrochemical, Food Products, Medicines & Pharmaceuticals, Plastic, Polymer, Steel
Declaration of an Islamic Republic	April 1, 1979
Official Languages	Persian (Farsi)
Dominant Religion	Islam
Currency	Iranian Rial
Time Zone	Iran Standard Time (UTC+3:30)
Calling Code	+98

Sources: IMF, The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	5,474,400	3,083,600	2,390,800
5 – 9	7,455,600	3,833,000	3,622,600
10 – 14	7,078,400	3,642,700	3,435,700
15 – 19	6,355,600	3,261,400	3,094,200
20 – 24	5,822,200	2,977,500	2,844,700
25 – 29	6,166,300	3,135,100	3,031,200
30 – 34	7,930,400	4,040,300	3,890,100
35 – 39	9,131,200	4,640,900	4,490,300
40 – 44	8,322,800	4,244,800	4,078,000
45 – 49	6,381,600	3,259,300	3,122,300
50 – 54	5,343,200	2,734,700	2,608,500
55 – 59	4,371,200	2,192,700	2,178,500
60 – 64	3,650,700	1,822,900	1,827,800
65 – 69	2,875,400	1,427,200	1,448,200
70 – 74	2,255,000	1,127,100	1,127,900
75 – 79	1,348,900	661,500	687,400
80+	1,076,603	458,610	617,993

Source: World Population Review

Population Per City (2024)



Source: World Population Review

Population

According to the World Population Review, Iran's population stood at 91.6 million in 2024, up from 90.6 million in 2023, and is projected to reach 95.5 million by 2030. The median age in Iran is 31.7 years and average life expectancy is 77.85 years.

Notably, even though Iran's labour market is showing signs of recovery, challenges remain, a World Bank report indicated.

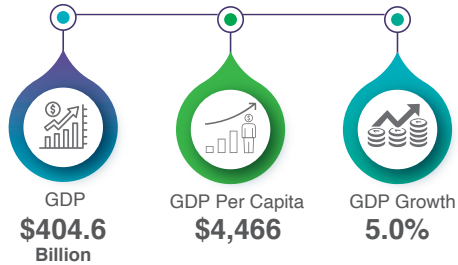
The labour market continues to grapple with underutilisation. In 2023/24, only 37.9% of the working-age population was employed. By 2024/25, labour force participation had improved slightly to 41.2%, driven in part by incremental gains in female workforce involvement, which rose to 14.3% up from 12.1% the year before. Additionally, an aging population and the outflow of skilled workers further limit economic growth and fiscal stability.

Economy

According to the World Bank, Iran's economy is set to expand for the fifth consecutive year, supported by a rebound in the oil sector and its positive effects on the broader economy. However, oil GDP growth has begun to slow in 2024/25 (the Iranian calendar year ending March 20) due to weakening global demand. Although non-oil growth has recently picked up pace, it remains limited in the medium term due to ongoing economic sanctions and years of stagnant capital stock.

In 2023/24, GDP growth accelerated to 5%, largely driven by the oil sector and services. Oil GDP surged by 14.7%, benefiting from tighter global oil markets and higher crude oil exports, which were partly facilitated by price discounts. Meanwhile, the non-oil sector expanded by 3.6%, with services playing a key role. Economic activity has continued its upward trend in 2024/25, with employment rising by 1.8% in the first quarter (April-June) compared to the previous year. While this employment growth helped reduce the unemployment rate to 7.7%, additional job creation is needed to improve labour force participation, which remains low at 41.2%.

State of Economy Highlights (in 2023)



Sources: World Bank

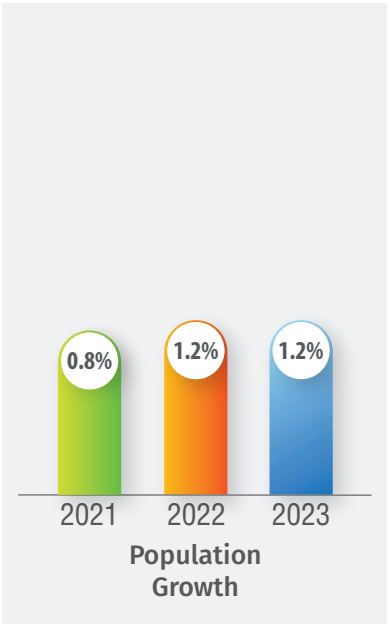
Looking ahead, GDP growth is expected to moderate in the medium term. In 2024/25, economic expansion is likely to slow due to tighter fiscal and monetary policies, as well as the temporary effects of the oil-driven rebound in 2023/24 amid a global demand slowdown. Non-oil growth is anticipated to face ongoing challenges from sanctions, energy shortages and economic uncertainty. Additionally, extreme weather conditions and water scarcity are likely to impact the agricultural sector, disproportionately affecting low-income populations. While inflation is projected to decline, it will likely remain high, posing difficulties for vulnerable households.

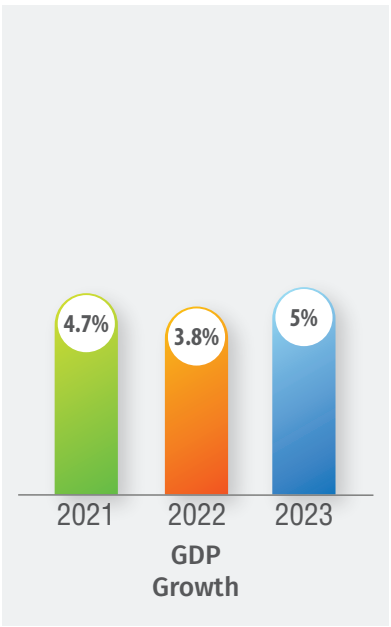
Overall, the economic outlook faces several downside risks, including geopolitical tensions. Increasing water and energy shortages, partly driven by climate change, could weigh on growth and livelihoods. Further sanctions and stricter enforcement may disrupt trade and trigger renewed inflationary pressures. A slowdown in the global economy, particularly in China – Iran's primary trading partner – could also negatively affect trade and growth. On the positive side, significant sanctions relief or a favourable interim agreement in nuclear negotiations could spark renewed economic momentum and reduce uncertainty.

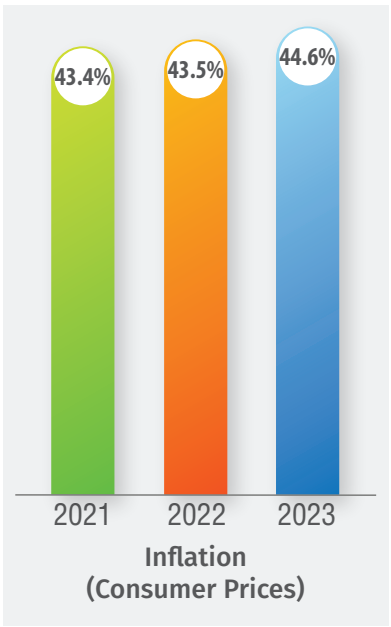
Indicators	*2024 - 25 (Estimated)*	*2025 - 26 (Projected)*	*2026 - 27 (Forecasted)*
Real GDP Growth	3.7%	2.9%	2.4%
CPI Inflation (Average)	31.9%	30%	28%
Exports (Growth)	7.9%	4.2%	3.1%
Imports (Growth)	2.8%	3.0%	3.0%

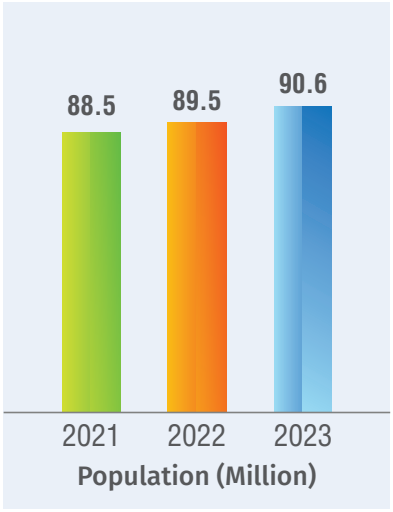
Source: World Bank

Key Macroeconomic Highlights

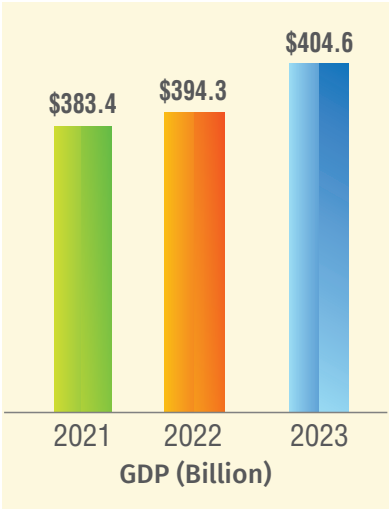






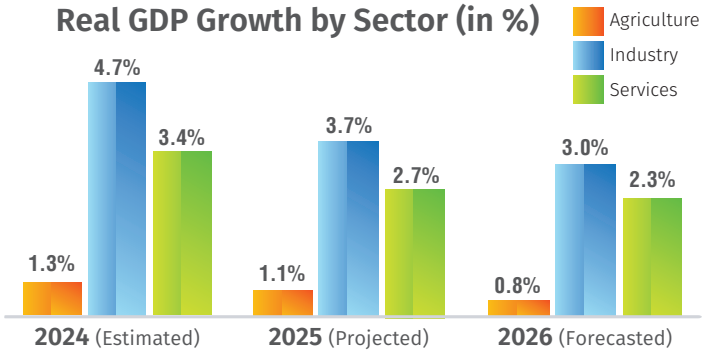






Sources: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

Export & Import Data (March-October 2024)

Export of Goods & Services — **$60.2 Billion**

Import of Goods & Services — **$39.5 Billion**

Source: Ministry of Economy, Iran

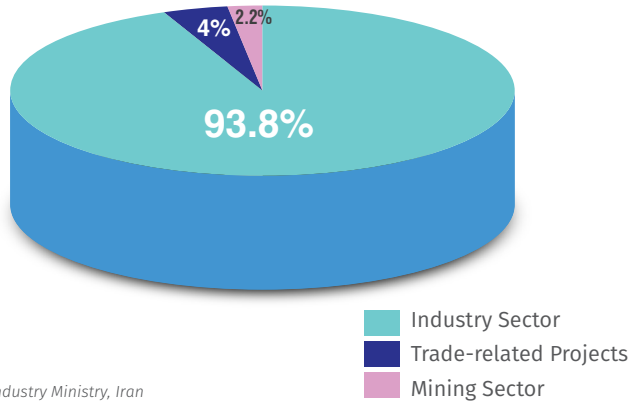
Maydam-e-Iman Square Esfahan, Iran



Investment

Iran's net foreign direct investment (FDI) in 2023/24 had reached a total of $5.5 billion, according to the Organization for Investment & Economic and Technical Assistance (OIETA). Of this amount, China accounted for $2 billion followed by Turkey, the UAE and Iranians residing abroad, while FDI inflow from Afghanistan didn't surpass $35 million. During the same calendar year, Iranian projects attracted an additional $2.5 billion in foreign investments, which were not authorised or registered by the OIETA. Further, OIETA added that during the past three years (since 2021) Iran's FDI reached $11 billion, with the oil and gas sector attracting the largest share of foreign investments during this period.

FDI by Sector (H1-2024/25)



Source: Industry Ministry, Iran

Total Non-Oil Exports
$32.5 BN

Crude Oil & Refinery Product Exports
$27 BN

Engineering Service Exports
$700 MN

Total Imports, Excluding Gold
$36.1 BN

Standard Gold Bullion Imports
$3.4 BN

Sources: Ministry of Economy, Iran



Trans Iranian Railway at Mazanderan Province, Iran

Iran Tourism Sector

The World Travel & Tourism Council's (WTTC) 2024 Economic Impact Research indicates that the travel & tourism sector in Iran directly accounted for 1.7% of the country's GDP in 2023, primarily generated by industries such as hotels, travel agents, airlines, restaurant and leisure industries and other passenger transportation services (excluding commuter services). This number is expected to grow by 3.7% annually totalling approximately $101.46 billion – accounting for 2.2% of the GDP – from 2024 to 2034. Meanwhile, leisure spending in Iran is set to increase from $131.4 billion in 2023 to $202.8 billion from 2024 to 2034, increasing at 3.4% annually.

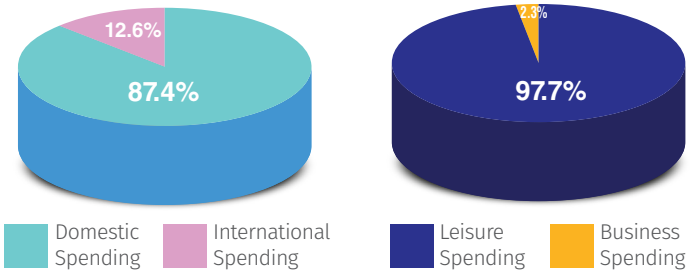
However, with the country's tourism industry closely tied to its political relations with other countries, Iran's average hotel occupancy rate has declined below 40%, according to the country's hotel association.

Tourism Index (2024)



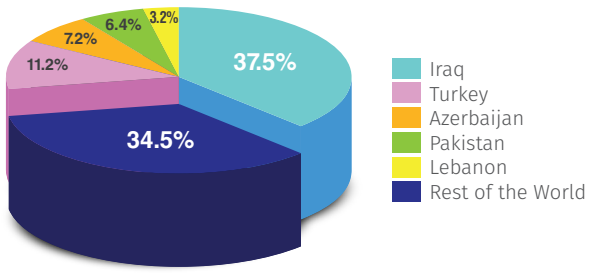
Sources: WEF Travel and Tourism Development Index & World Travel and Tourism Council

Percentage Share of Total Spending (2023)



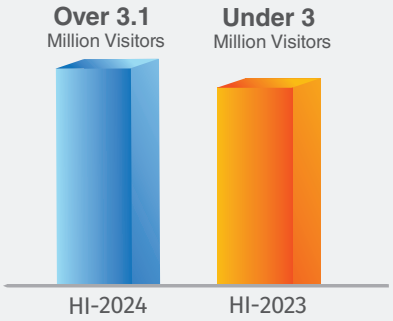
Sources: World Travel & Tourism Council

Inbound Arrivals (2023)



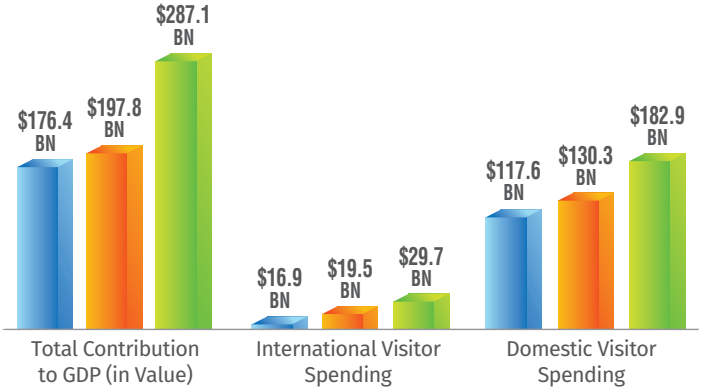
Sources: Oxford Economics, UN Tourism

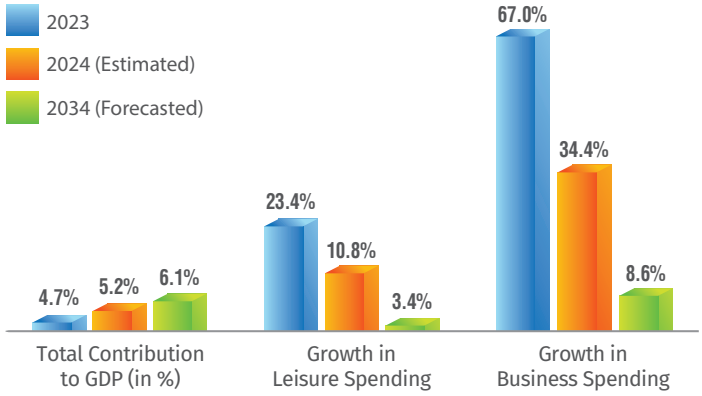
Tourist Footfall at a Glance



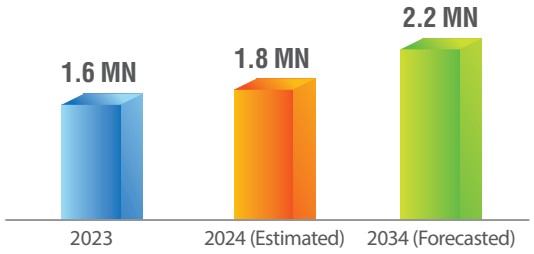
Source: UN Tourism

Tourism Trends: GDP, Leisure & Business Spending





Total Job Creation



Source: World Travel & Tourism Council

Iran Leisure & Entertainment Industry

Iran's FEC and theme park landscape is gradually expanding, supported by a growing youth population and increasing domestic tourism. Despite economic challenges and international sanctions, the sector has seen investment in indoor amusement centres, children's edutainment venues and waterparks in major cities including Tehran, Mashhad and Isfahan. Projects such as Eram Park in Tehran exemplify the country's efforts to offer modern leisure experiences. With a focus on local culture and family-oriented attractions, the industry is carving out a resilient niche, catering primarily to domestic visitors and fostering community engagement. Meanwhile, recording the highest attendance in 24 years, in 2024 Iranian cinemas welcomed over 34 million moviegoers, generating approximately $21 million in revenue. This surge reflects a renewed public interest in cinema. Despite economic challenges and censorship constraints, the country's entertainment landscape is evolving, offering diverse experiences to its citizens while contributing to the country's cultural and economic vitality.

Key Leisure & Entertainment Operators

- Aftab Shore Park
- Arg Fun Time
- DREAM LAND (Shahr-e-Roya) - Isfahan
- Eram Park
- GMAX Adrenaline Park
- Gohar Park, Sirjan
- IR Escape Room
- Karaland
- Kish Aquarium
- Kish Dolphin Park
- Kouhsar Sports and Cultural Complex
- Mellat Park
- Ocean Water Park, Kish Island
- Roshano Land
- Setareh Amusement Center
- Theme Park Center
- Tochal Telecabin
- Wonderland



Eram Park, Tehran



Ocean Water Park, Kish Island



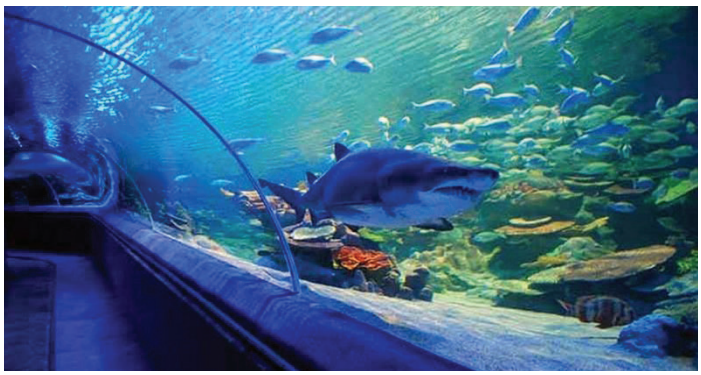
Kourosh Mall Family Entertainment Center



Gohar Park, Sirjan



Mellat Amusement Park – Mashhad



Kish Aquarium, Kish Island



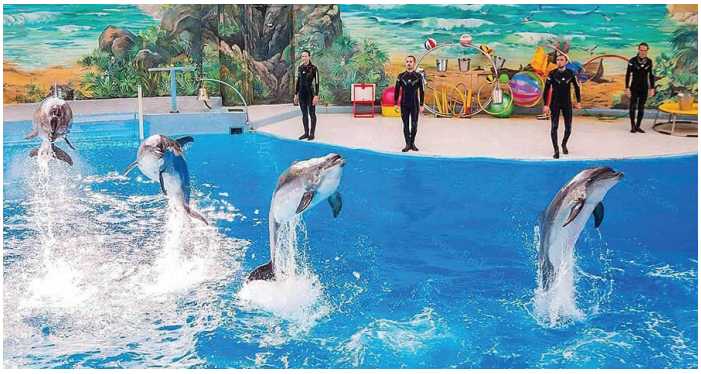
IRANLAND FEC, Shiraz, Iran



Tochal Telecabin



DREAM LAND (Shahr-e-Roya) - Isfahan



Kish Dolphin Park - Kish Island



Eram Park



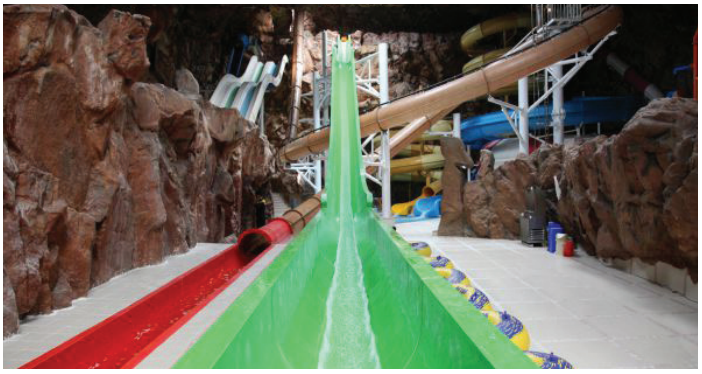
GMAX Adrenaline Park



IR Escape Room



Karaland



Aftab Shore Park



WONDERGALAXY, Isfahan



Wonderland, Mashad



Arg Fun Time

Upcoming Mega Projects at a Glance

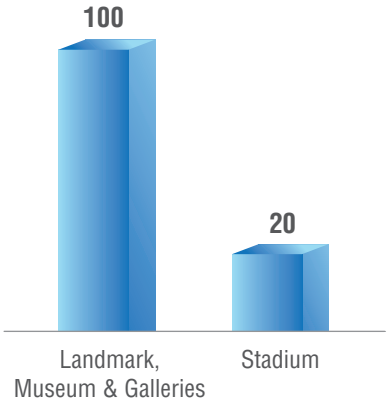
Investment in hospitality infrastructure, such as luxury hotels & resorts, boutique accommodations and eco-lodges, has enhanced Iran's capacity to accommodate visitors, particularly in major cities and tourist hubs including Shiraz, Isfahan and Kish Island.

Additionally, ancient sites like Persepolis attract tourists. The leisure and entertainment sector remains vibrant, with modern family entertainment centres, theme parks and shopping malls blending retail with recreation. A good example is the Iran Mall in Tehran.

Meanwhile, the retail scene is evolving, with a surge in both traditional *bazaars* and contemporary shopping complexes, boosting consumer spending. These sectors not only contribute to GDP but also help diversify Iran's oil-dependent economy. They stimulate local economies, promote entrepreneurship and hold the potential to increase FDI. Despite challenges including sanctions and geopolitical tensions, these industries offer significant potential for economic resilience and growth in Iran.

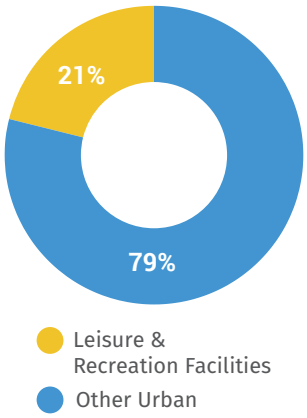
Iran's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

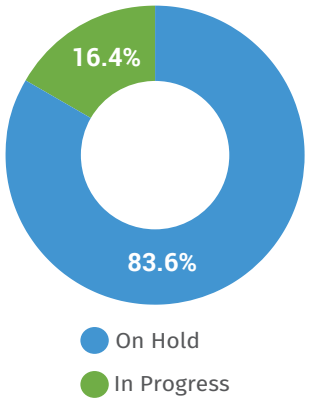


Source: BNC

Contribution of Leisure & Recreation Industry to Iran's Urban Sector



Stage-wise Distribution



Tourism Complex - Gurdim

Value: USD 90 million
Stage: Design
Developers: Government of Iran, Ministry of Cultural Heritage, Tourism and Handicraft Organization
Description: The project involves the construction of a 264-hectare tourism complex in the Gurdim region of Konarak County, expected to create approximately 1,200 jobs upon completion. The complex will feature several key attractions, including a five-star hotel with 900 rooms, Iran's largest golf course, the country's largest handicrafts park, a water park, theme parks, greenhouses and boutique parks.
Completion: Q4 2029



Mini World Theme Park - Malayer, Hamadan Province

Value: USD 22.5 million
Stage: Ongoing
Developer: NA
Description: The second phase of this expansive theme park was inaugurated in September 2024. The park showcases replicas of 138 iconic structures from around the world, including iconic structures such as Persepolis, the Leaning Tower of Pisa, the Veresk Bridge, the Acropolis, the Eiffel Tower, the Taj Mahal, the Si-o-se Pol bridge, the Great Pyramids of Giza, the Moai statues of Easter Island and the tombs of Persian poets Hafez and Khayyam, as well as the mausoleum of Avicenna, Sun Palace, the Great Wall of China, the Gonbad-e Qabus tower and many others. Spanning 48 hectares, it serves as a unique destination highlighting global architectural and cultural heritage.
Completion: NA





Winter in Tehran with snow covered Alborz mountains



Spiral minaret of the Great Mosque of Samarra, UNESCO World Heritage Site, Iraq



REPUBLIC OF IRAQ

In recent years (2024-25), Iraq's economy has been diversifying beyond oil. With Baghdad being named as the Arab Tourism Capital for 2025, the government aims to attract $7 billion in investments, focused on tourism. Additionally, Iraq is seeking alternative gas suppliers to replace imports from Iran, enhancing energy security.

Geography

Located in the Middle East, Iraq shares borders with Turkey, Iran, Kuwait, Saudi Arabia, Jordan and Syria. Spanning approximately 437,367 square kilometres (sq km), Iraq boasts a diverse landscape that includes the Mesopotamian plains, Zagros Mountains in the northeast and the western desert. The Tigris and Euphrates Rivers run through Iraq, providing fertile land and sustaining agriculture. Iraq has a small coastline along the Persian Gulf, which enhances its trade and oil export capabilities.

Iraq, home to Mesopotamia – often referred to as the 'Cradle of Civilisation' – was the birthplace of Sumerians, Babylonians and Assyrians, pioneers in writing, mathematics and governance. Later, Iraq was part of the Persian Empire and the Abbasid Caliphate (750–1258 CE), with Baghdad as a hub of learning. It then fell under Ottoman rule until World War I, became a British mandate and gained independence in 1932.

Owing to its vast oil reserves, Iraq is a key player in the global energy market and a major member of OPEC (Organization of the Petroleum Exporting Countries). Iraq's proximity to the Persian Gulf allows it to export crude oil efficiently, influencing global oil supply and prices. Beyond oil, Iraq is strategically located at the crossroads of the Arab world, Turkey and Iran, serving as a potential trade hub for Asia, Europe and the Middle East. It shares borders with key regional players, making it a focal point for energy pipelines, trade routes and political influence. Iraq's Shatt al-Arab waterway, which connects the Tigris and Euphrates Rivers to the Persian Gulf, is also vital for international shipping and commerce.

Population

According to the World Population Review, Iraq's population stood at 46 million in 2024, up from 45.1 million in 2023, and is projected to reach 51.9 million by 2030. The median age in Iraq is 21.2 years and average life expectancy is 74.9 years.



Main square of Erbil, Iraq



Iraq at a Glance

Official Name	Republic of Iraq
Land Area	437,367 sq km
Capital	Baghdad
Government	Federal Parliamentary Republic
Prime Minister	Mohammed Shiaa' Al Sudani
Population (2024)	46 Million
Population Density	106.01 per sq km
Population Growth	2.25%
Nationality Split	Arabs and Kurds
GDP (2023)	$250.8 Billion
GDP Per Capita (2023)	$5,565
GDP Growth (2023)	-2.9%
Inflation – Consumer Prices (2023)	4.4%
Industries	Agriculture, Petroleum & Services
Independence Day	October 3, 1932
Official Languages	Arabic and Kurdish
Dominant Religion	Islam
Currency	Iraqi Dinar
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+964

Sources: IMF, The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	5,610,200	2,876,300	2,733,900
5 – 9	5,562,000	2,850,600	2,711,400
10 – 14	5,670,400	2,905,500	2,764,900
15 – 19	4,779,500	2,446,300	2,333,200
20 – 24	4,256,500	2,173,100	2,083,400
25 – 29	3,843,800	1,952,300	1,891,500
30 – 34	3,383,800	1,710,200	1,673,600
35 – 39	2,798,300	1,402,800	1,395,500
40 – 44	2,406,200	1,196,500	1,209,700
45 – 49	2,089,500	1,032,300	1,057,200
50 – 54	1,758,000	855,900	902,100
55 – 59	1,371,800	644,900	726,900
60 – 64	939,400	422,300	517,100
65 – 69	601,100	258,800	342,300
70 – 74	492,200	202,800	289,400
75 – 79	275,400	108,700	166,700
80+	203,209	71,216	131,993

Source: World Population Review

Population Per City (2024)



Source: World Population Review

Economy

According to the World Bank, Iraq's oil-driven GDP contraction of 2023 has begun to moderate in 2024. New OPEC+ agreements, including Iraq's voluntary production cuts and the suspension of northern oil pipeline exports, led to a 2.9% GDP contraction and a 7.7% decline in oil GDP in 2023. However, a 5.6% year-on-year rebound in the non-oil sector, driven by public services growth and improved agricultural output, helped offset some of the decline. This trend continued into the first quarter of 2024, with real GDP contracting 2.4% year-on-year. Inflationary pressures have eased, supported by lower global food prices, the Dinar's upward revaluation in February 2023, and tighter monetary policies.

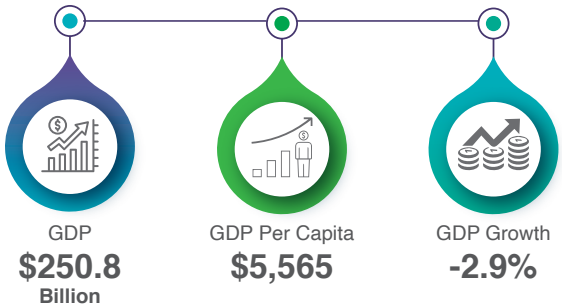
Looking ahead, economic prospects remain tied to global oil demand and fiscal policy decisions. Real GDP growth is expected to average 2.9% from 2024-26, assuming adherence to the September 2024 OPEC+ agreement and increased oil production capacity by 2026. However, non-oil GDP growth may slow due to moderating government spending and structural bottlenecks, while inflation is expected to stay contained, aided by subsidised imports.

Large-scale infrastructure projects could help address key economic constraints as Iraq moves towards reconstruction and stability. However, risks persist. Domestic challenges, including the upcoming October 2025 elections, could delay reforms, while political tensions might disrupt economic progress and infrastructure development. External risks, such as Middle East conflicts, a global economic slowdown and declining oil demand, could significantly impact Iraq's outlook. Additionally, climate change threatens agriculture and rural livelihoods, posing further economic challenges.

Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	-0.9%	4.0%	5.7%
CPI Inflation (Average)	3.7%	3.3%	3.1%
Exports (Growth)	-4.1%	4.8%	7.8%
Imports (Growth)	16%	1.2%	3.6%

Source: World Bank

State of Economy Highlights (in 2023)

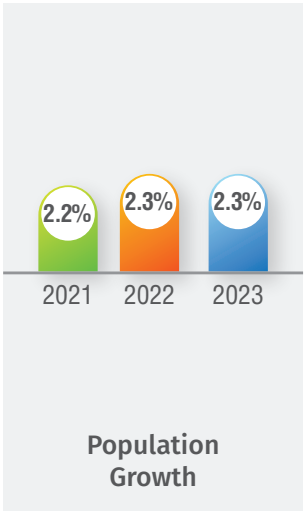


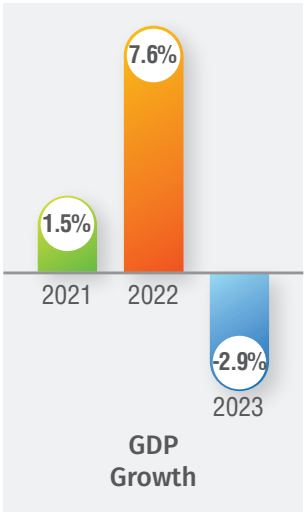
Source: World Bank

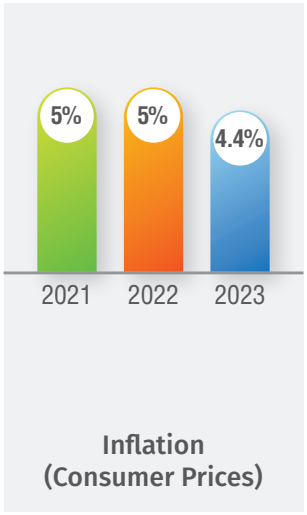


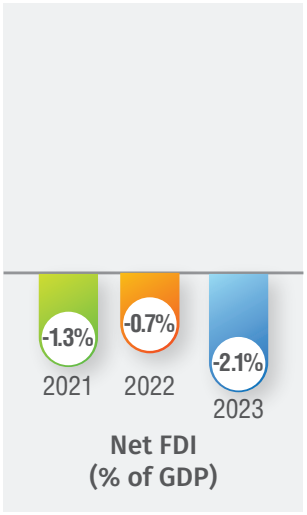
Domes of Al Shaheed War Memorial, Baghdad

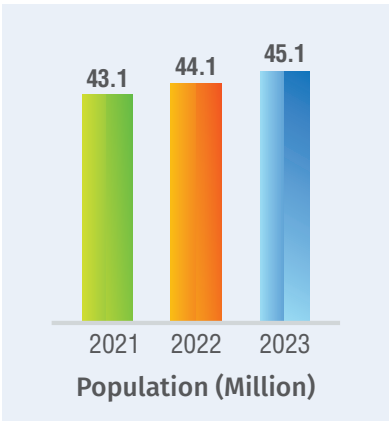
Key Macroeconomic Highlights

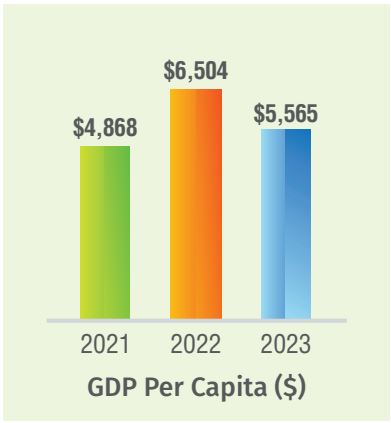


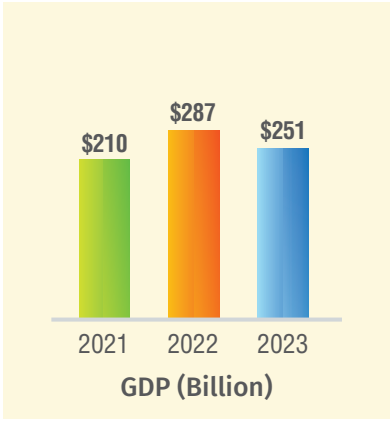










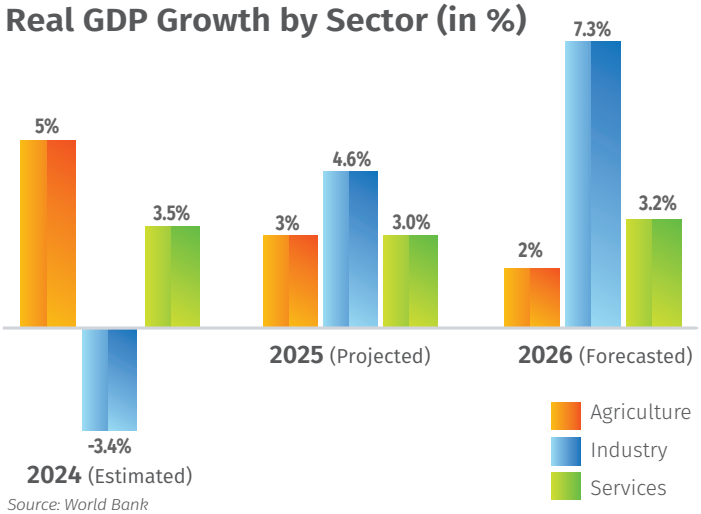


Source: World Bank



Jalil Khayat Mosque in the city of Erbil, Iraq

Real GDP Growth by Sector (in %)



Source: World Bank

Trade Data (H1-2024)

Total Trade	$65 Billion
Export of Goods	$45 Billion
Import of Goods	$20 Billion

Source: Iraq Future Foundation for Economic Studies and Consultations

Forecasted Export & Import Data (% of GDP)

	2024	2025	2026	2027	2028	2029
Export	38.1%	36.8%	35.3%	34.2%	33.5%	33%
Import	-35%	-35%	-34.8%	-34.5%	-34.5%	-34.5%

Investment

Iraq recorded $63 billion in foreign direct investment (FDI) in 2024 versus $24 billion during the first nine months of 2023, indicated the National Investment Commission (NIC). In 2024, the country's FDI spanned various sectors, presenting an opportunity to enhance Iraq's global standing as an investment hub. The participation of well-established international companies highlights the appeal of the Iraqi market, particularly in areas such as renewable energy and oil & gas, according to NIC.

Having said that, it's crucial to note certain factors limiting FDI in Iraq including:

- Over reliance on the oil sector making the economy susceptible to fluctuations in energy markets.
- Lengthy and complex procedures for resolving commercial disputes and ensuring timely payments.
- Lack of transparency in regulations creating operational difficulties for investors.
- Irregularities in government contracts, licensing and tendering processes leading to inefficiencies.
- An underdeveloped banking sector with restricted financing options.
- Ongoing security risks, violence and instability in several regions deterring investment.



Kurdistan landscape, Iraq

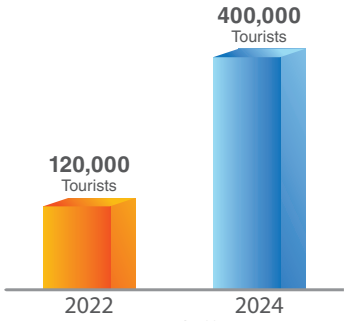
Iraq Tourism Sector

According to the World Travel & Tourism Council's (WTTC) 2024 Economic Impact Research in 2023, Iraq's travel & tourism contributed $3.74 billion (1.7% of GDP), driven by industries such as hotels, travel agencies, airlines, restaurants, leisure activities and passenger transportation services (excluding commuter services). From 2024 to 2034, this sector is expected to grow by 5% annually, reaching $6.98 billion (2.5% of GDP).

The sector directly generated 199,850 jobs (2.1% of total employment) in 2023, encompassing roles in hospitality, travel services and tourism-related leisure industries. By 2034, direct employment within this sector is projected to rise to 306,176 jobs (2.5% of total employment), growing at 3.8% annually. Additionally, total employment supported by travel & tourism is forecasted to reach 940,905 jobs (7.6% of total employment) by 2034, reflecting a 2.5% annual increase.

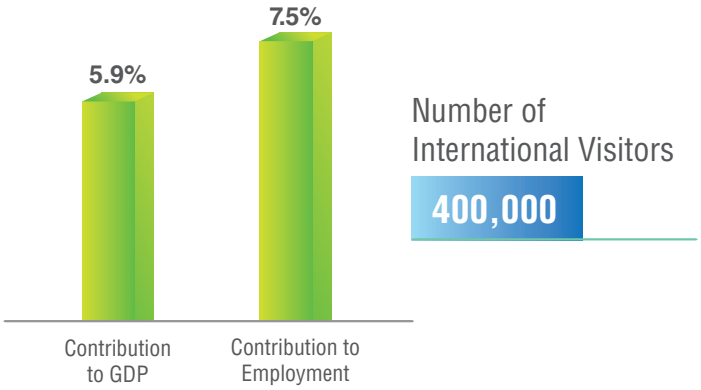
By 2034, international tourist arrivals are expected to reach 1.9 million driving an expenditure of $7.20 billion, with an 8.5% annual growth rate. Leisure travel spending is set to increase by 5.8% annually, reaching $9.22 billion, while business travel spending is projected to grow 4.5% annually, totalling $6.70 billion by 2034.

Tourist Footfall at a Glance



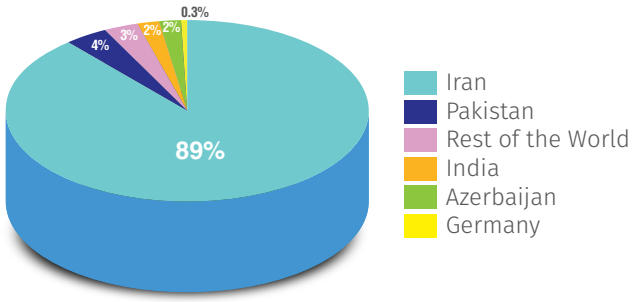
Source: CNN Report

Tourism Index (2024)

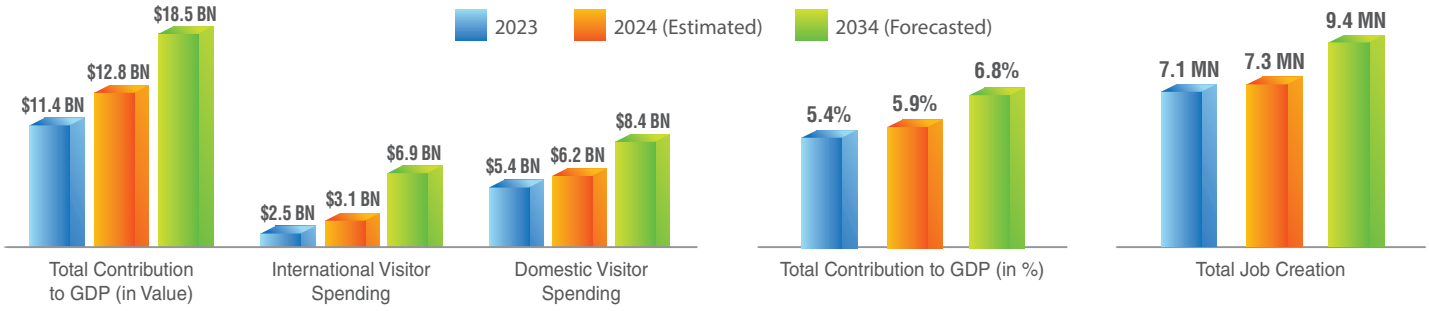


Sources: World Travel and Tourism Council & Tourism Ministry, Iraq

Inbound Arrivals (2023)

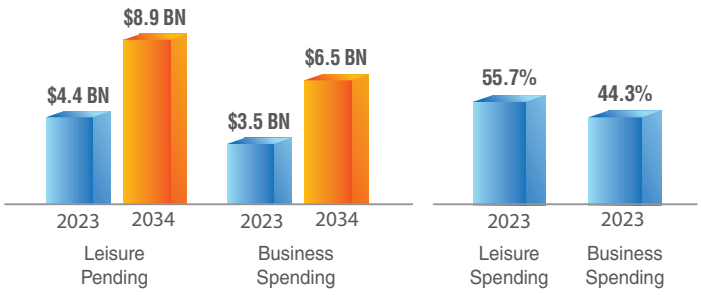


Sources: Oxford Economics, UN Tourism

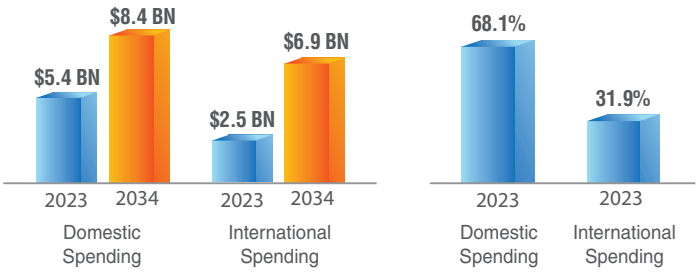


Source: World Travel & Tourism Council

Growth in Leisure & Business Spending



Total Spending on Travel & Tourism



Sources: World Travel & Tourism Council

Baghdad has been named the 'Capital of Arab Tourism in 2025' by the Arab Tourism Organization, which promises to boost tourism in Iraq.

Iraq Leisure & Entertainment Industry

The leisure and entertainment sector in Iraq is gradually evolving, with growing interest in family-oriented attractions. After years of instability, improving security in parts of the country, especially in urban areas like Baghdad, Erbil and Basra, has paved the way for increased private and public investment in entertainment infrastructure.

Family entertainment centres (FECs) and indoor amusement parks are gaining popularity, especially in shopping malls and newly developed mixed-use complexes. These venues offer safe, climate-controlled environments ideal for Iraq's hot climate and appeal to a wide demographic, including children, teenagers and families. Theme parks and water parks, though fewer in number, are also beginning to emerge as major attractions. Notable developments include modern water parks in cities like Erbil and Baghdad, offering a mix of slides, wave pools and family-friendly amenities. However, large-scale theme parks remain limited due to high investment costs, regulatory challenges and infrastructure constraints.

Despite these limitations, the growing young population and a cultural shift towards family recreation are driving demand. Government and private investors are recognising the potential for growth in this sector, with projects in the pipeline aimed at expanding entertainment offerings across the country.

Key Leisure & Entertainment Operators

- Al-Zawraa Park
- Azadi Amusement Park
- Baghdad Island Park
- Baghdad Zoo
- Chavi Land Sulaymaniyah
- Dream City Duhok
- Escape Room Iraq
- Family Fun Erbil
- Family Indoor Games
- Happy Land Park
- Land of Sindbad City
- Palms Of Baghdad
- Queen's Park
- Sindbad Land Theme Park
- The Ancient City of Ramadi Games
- Tigris Water City
- Wonderland Baghdad
- X PADEL Erbil
- Zawraa Park Baghdad



Dream City, Duhok


Chavi Land, Sulaymaniyah


Azadi Amusement Park


Baghdad Island Park


Sindbad Land Theme Park


Wonderland Baghdad



Zawraa Park, Baghdad



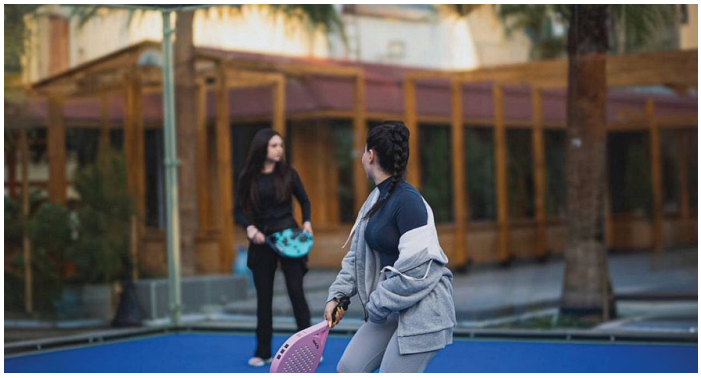
Family Fun, Erbil



Queen's Park



Baghdad Zoo



X PADEL Erbil



Escape Room Iraq

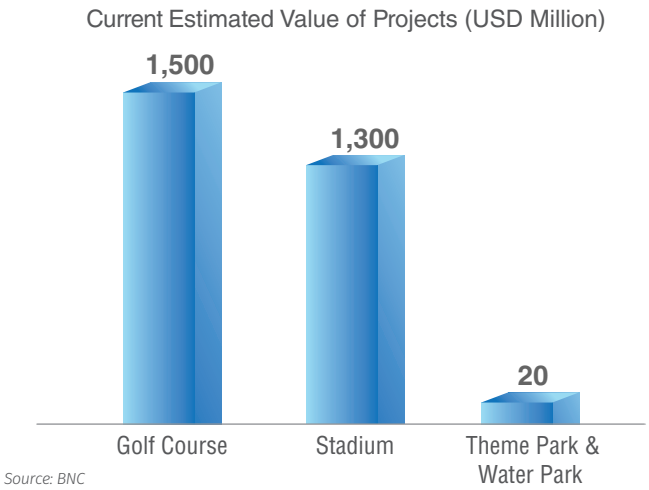


Al Mustansirya School, a landmark of Baghdad

Upcoming Mega Projects at a Glance

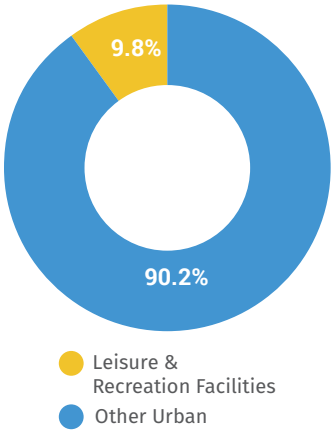
Iraq's tourism, hospitality, leisure & entertainment and retail sectors are emerging as key contributors to economic diversification and job creation. Religious tourism, particularly to Najaf and Karbala, attracts millions of visitors annually, while the country's historical sites, cultural heritage and eco-tourism potential offer untapped growth opportunities. Investments in hotels, restaurants and entertainment facilities are expanding to accommodate rising tourist demand. The retail sector is also witnessing transformation, driven by urbanisation, rising consumer spending and international brands entering the market. Shopping malls and modern retail spaces are growing, catering to both domestic and foreign shoppers. Meanwhile, the leisure and entertainment industry, including cinemas, amusement parks and family entertainment centres, is slowly gaining traction, enhancing Iraq's appeal for both locals and visitors. With infrastructure projects, government reforms and a gradual increase in foreign investments, these sectors have the potential to play a pivotal role in long-term sustainable growth for Iraq.

Iraq's Leisure & Recreation Market Distribution

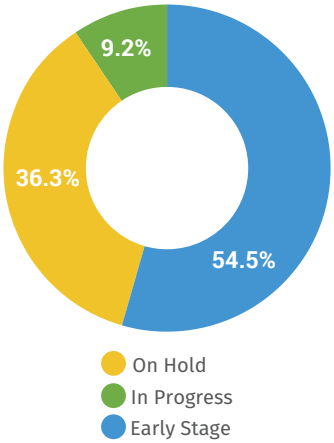


Source: BNC

Contribution of Leisure & Recreation Industry to Iraq's Urban Sector



Stage-wise Distribution



Baghdad Golf Course and Spa

Value: USD 1.5 billion
Stage: Concept
Developers: Eagle Hills
Description: The project involves constructing a luxury golf resort in Baghdad, named the 'Baghdad Golf Course and Spa.' It will feature a world-class golf course, high-end residential neighbourhoods, a five-star hotel and an exclusive resort club. The aim is to create a unique lifestyle experience for both residents and visitors, offering a perfect blend of leisure, relaxation and high-quality living. The hotel and resort club will provide top-tier amenities such as fine dining, spa services and recreational facilities, ensuring a comprehensive and unforgettable experience for all. The resort will be designed to international standards, catering to both amateur and professional players.
Completion: Q4 2030



Baghdad Avenue - Al-Rafeel City

Value: USD 1 billion
Stage: Under Construction
Developers: National Investment Commission of Iraq, Baghdad Municipality, Saudi-Iraqi Investment Company
Description: The project located in the Al-Rafeel City area near Baghdad International Airport aims to become Iraq's largest shopping mall, featuring spacious cafés and restaurants as well as commercial office spaces for prominent Iraqi companies. It will also include 4,320 residential units distributed over 36 residential towers with a height of 20 floors, with six residential units per floor and 2,234 two-story villas.
Completion: Q3 2028



Karbala Gate - Karbala



Value: USD 100 million
Stage: Under Construction
Developers: Ministry of Youth & Sports
Main Contractor: Tri Arena (Baghdad)
Description: This project involves the construction of a residential compound spanning 517,806 sqm in Karbala. Alongside 796 villas, the development will incorporate ample green spaces, Iraq's second Cadmus International School, a solar-powered centralised gas system and a smart air-conditioning system. The 'Karbala Gate' endeavour aims to present modern architecture, extensive green areas and a vibrant boulevard, fostering a thriving community hub for the city's inhabitants.
Completion: Q4 2027

Al Basrah New City (ABNC)



Value: USD 300 million
Stage: Under development
Developers: National Investment Commission (NIC), TRAC Development Group
Description: Al Basra New City (ABNC) is a large urban development project located on the opposite side of the old town of Basra, across the Shatt Al Arab River in the province of Basra. The master plan for ABNC covers an area of 28.2 sq km, divided into six mixed-use towns. It includes residential areas, commercial and business districts, educational facilities, public spaces and sports and recreational facilities.
Completion: NA

Mosul International Stadium



Value: USD 97.4 million
Stage: Under Construction
Developers: Ministry of Youth & Sports
Main Contractor: Tri Arena (Baghdad)
Description: A new representative stadium in Mosul, the second largest (after Baghdad) city in Iraq, is to be built with funding from the Ministry of Youth and Sports. The project involves the construction of a l football stadium for 30,000 spectators, with two-tiered, fully covered stands around the pitch. The project also includes a hotel, as well as two training pitches (including one with a running track). The facility will be built in the northern part of Mosul and is to be permanently hosted by Mosul SC football club.
Completion: NA

Iraq Mall (Baghdad)



Value: NA
Stage: Under Construction
Developers: NA
Description: As the largest mall in Iraq, with an impressive 150,000 sqm of gross leasable area (GLA), this mixed-use development will redefine shopping, leisure and luxury in the region. A centerpiece of innovation and entertainment, Iraq Mall will feature one of the largest indoor entertainment zones in the world, spanning an astonishing 30,000 sqm. Visitors can enjoy a cutting-edge cinema complex with 14 screens, including Iraq's very first IMAX experience. The entertainment offerings are further enhanced by an advanced dancing fountain equipped with hologram, laser and fire shows, complemented by one of the world's largest screens at 3,000 sqm.
Completion: Q4 2025



The Temple of Hercules, Amman, Jordan



KINGDOM OF JORDAN

Jordan remains resilient and maintains macroeconomic stability despite challenges arising from regional conflicts and heightened uncertainty. The country's economy continues to expand, demonstrating steady growth, while inflation remains low.

Geography

Jordan, located in the heart of the Middle East, shares borders with Saudi Arabia, Iraq, Syria, Israel and Palestine. It covers approximately 89,342 square kilometres (sq km), with diverse landscapes that include the arid Jordanian desert, fertile Jordan Valley and the mountainous highlands. The country's most famous geographic feature is the Jordan River, which flows into the Dead Sea – the lowest point on Earth at 430 metres below sea level.

Historically, Jordan has been home to numerous civilisations, making it rich in archaeological heritage. It was part of the ancient Nabataean Kingdom, with Petra, one of the New Seven Wonders of the World, serving as its capital. Later, the region fell under Roman, Byzantine and Islamic rule, leaving behind landmarks such as Jerash's Roman ruins and Amman's Citadel. During the 7th century, Jordan became part of the Islamic Caliphates, and in the early 16th century it was incorporated into the Ottoman Empire.

After World War I, Jordan came under British control as part of the League of Nations mandate. In 1946, it gained independence as the Hashemite Kingdom of Jordan, with King Abdullah I as its first ruler. Since then, Jordan has played a strategic role in Middle Eastern politics, maintaining stability despite regional conflicts. Today, it remains a key player in diplomatic efforts and is known for hosting large refugee populations while preserving its historical and cultural heritage.

Population

According to the World Population Review, Jordan's population stood at 11.57 million in 2024, up from 11.4 million in 2023, and is projected to reach 12.4 million by 2030.

A significant majority, 85.1%, reside in urban areas, reflecting Jordan's urbanisation trend. Around 31% of the population is aged between 0 and 14 years, underscoring a substantial young population. The median age is relatively young at 23.5 years. Ethnically, around 94% of Jordanians are Arabs, with the remaining 6% comprising ethnic minorities such as Circassians, Chechens, Armenians and Kurds. The country has also been a refuge for displaced individuals.

In terms of the labour market, unemployment has declined slightly for the second consecutive year, reaching 22% and further dropping to 21.4% in Q1 2024. However, labour force participation remains largely stagnant, particularly among women and youth. A recent positive development emerged in early 2024, as the female participation rate rose to 15.5%, the highest level since Q3 2018.



Jordan at a Glance

Official Name	Jordan
Land Area	89,342 sq km
Capital	Amman
Government	Parliamentary constitutional monarchy
King	His Majesty King Abdullah II Bin Al Hussein
Population (2024)	11.6 Million
Population Density	130 per sq km
Population Growth	1.6%
Nationality Split	Arab (94%), remaining are ethnic minorities
GDP (2023)	$51 Billion
GDP Per Capita (2023)	$4,456
GDP Growth (2023)	2.7%
Inflation – Consumer Prices (2023)	2.1%
Industries	Agriculture, chemical products, food products, logistics, manufacturing, mining, pharmaceuticals, textile products
Independence Day	May 25, 1946
Official Language	Arabic
Dominant Religion	Islam (majority) Christianity (minority)
Currency	Jordanian Dinar
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+962

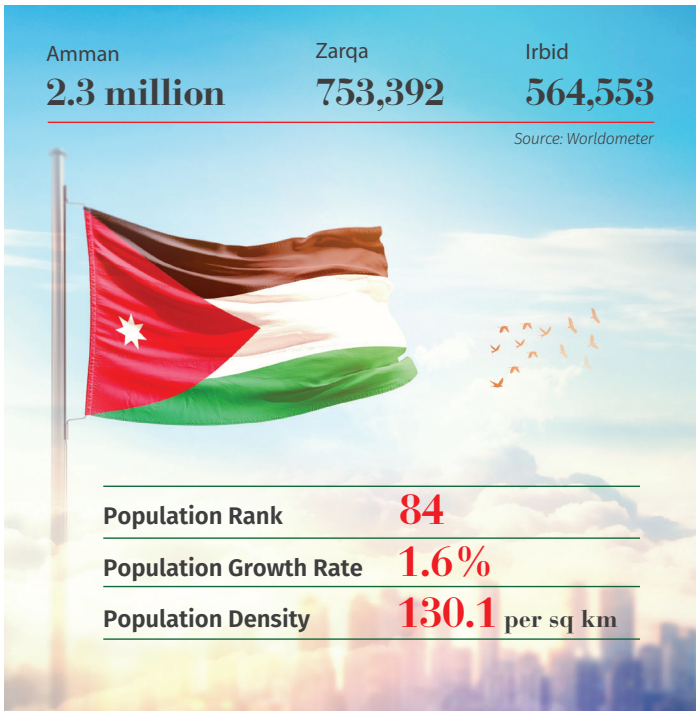
Sources: The CIA World Factbook, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	1,153,900	589,900	564,000
5 – 9	1,170,600	598,500	572,100
10 – 14	1,218,800	618,000	600,800
15 – 19	1,136,200	568,900	567,300
20 – 24	996,000	502,400	493,600
25 – 29	978,700	506,000	472,700
30 – 34	932,300	497,900	434,400
35 – 39	813,500	433,400	380,100
40 – 44	706,800	371,600	335,200
45 – 49	612,000	322,700	289,300
50 – 54	543,300	289,400	253,900
55 – 59	444,900	236,600	208,300
60 – 64	322,900	167,900	155,000
65 – 69	216,900	109,700	107,200
70 – 74	143,600	71,900	71,700
75 – 79	86,900	41,400	45,500
80+	75,337	30,981	44,356

Source: World Population Review

Population Per City (2024)



Source: World Population Review

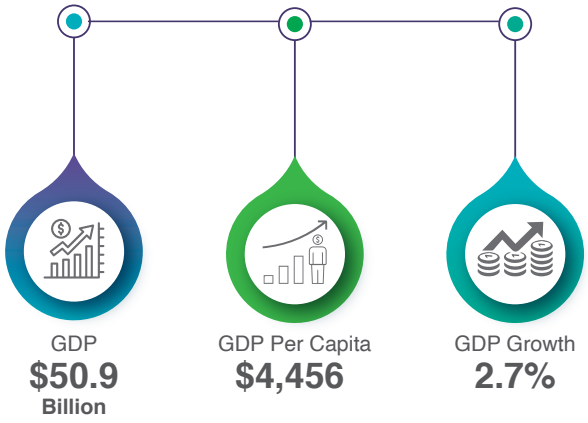
Economy

Despite its resilience, the ongoing and expanding regional conflict is negatively impacting Jordan's economy than initially expected, slowing growth and straining government finances, stated the International Monetary Fund (IMF). Economic growth is forecasted to moderate to 2.3% in 2024, down from 2.7% in 2023. Although this is a moderate decline, the composition of growth is shifting, with stronger net exports balancing weaker domestic demand. Growth is expected to remain subdued at 2.5% in 2025 but is projected to accelerate in the following years, assuming conflict resolution, continued sound macroeconomic policies and further reform progress.

In 2024, the country's manufacturing sector reached a record high and strong performance was seen in both services and agriculture sectors. Within the services sector, restaurants and hotels experienced their second-highest growth since 2017.

With moderate growth rates, unemployment reduction has been slow, leaving the unemployment rate at 21%. Inflation is expected to stay low at around 2%, reflecting the Central Bank of Jordan's commitment to monetary stability and the exchange rate peg. Despite these challenges, Jordan's external position remains relatively strong. Having said that, according to the World Bank's 'Jordan Economic Monitor – Summer 2024', the country's medium-term outlook remains uncertain due to the ongoing conflict in the Middle East. While the broader economy has demonstrated resilience, trade has been disrupted and tourism has suffered setbacks. Additionally, broader regional disruptions may further impact trade, drive up oil prices and alter consumer behaviour, posing additional economic risks.

State of Economy Highlights (in 2023)

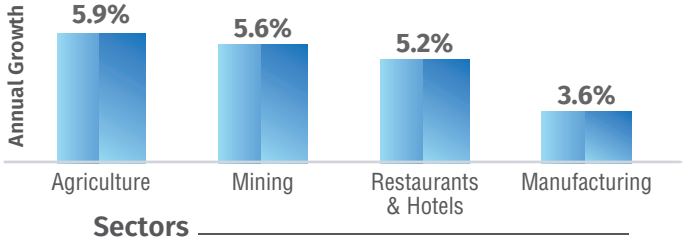


Total Exports
$12 Billion
(For Year 2024)

Total Imports
$27 Billion
(For Year 2024)

Sources: World Bank & Department of Statistics, Jordan

Non-Oil Sectoral Growth – 2023

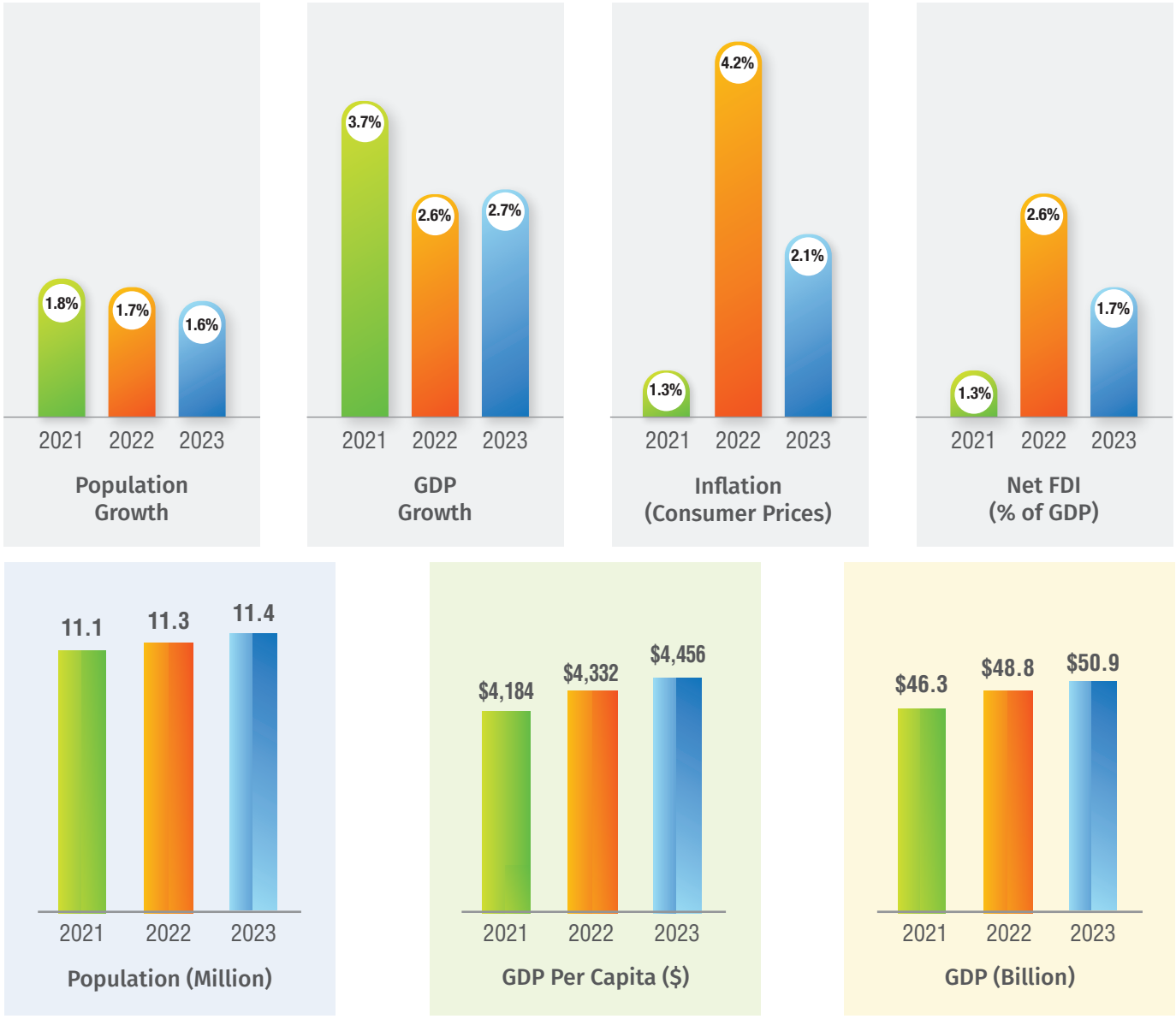


Source: World Bank 'Jordan Economic Monitor – Summer 2024'

Indicators	*2024 (Estimated)*	*2025 (Projected)*
Real GDP Growth	2.3%	2.5%
CPI Inflation (Average)	1.7%	2.2%

Source: IMF

Key Macroeconomic Highlights



Sources: World Bank

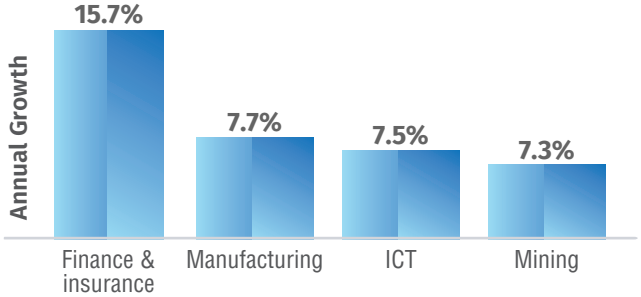
Investment

The country's foreign direct investments (FDI) witnessed a 3.7% increase during the third quarter of 2024 versus the corresponding period in 2023 driven by Jordan's economic modernisation efforts. According to the Central Bank of Jordan, the country's total FDI inflows during the first three quarters of 2024 reached $1.3 billion. During the third quarter of 2024 itself, FDI inflows totalled approximately $458 million, thereby maintaining a steady contribution of 3.2% to the country's GDP.

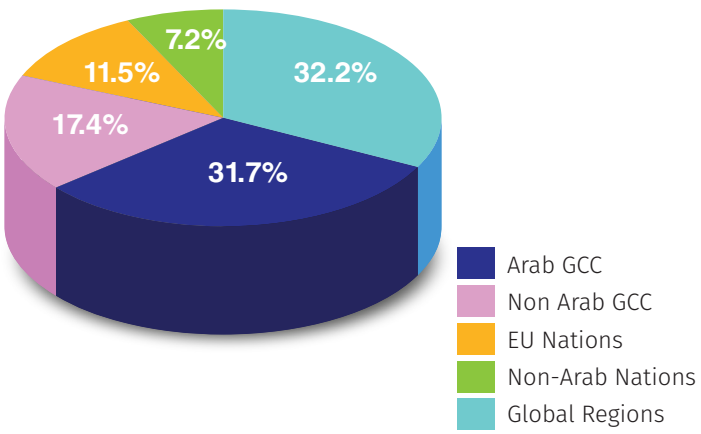
Share of FDI



Top Sectors by FDI Inflow (Q3-2024)



FDI Inflow by Region (Q3-2024)



Source: Central Bank of Jordan

Economic Modernisation Vision

Before getting into Jordan's Economic Modernisation Vision that represents a strategic roadmap designed to foster sustainable economic growth, enhance global competitiveness and improve the overall quality of life for its citizens through targeted initiatives and comprehensive reforms, a mention must be made of the country's 2025 Vision and Strategy.

Launched in 2015, the key objectives of the 10-year plan included increasing the country's annual GDP growth from 3.1% in 2014 to 7.5% by 2025. Going by the current estimates, the number is lower than the initial goal due to several factors including regional disruptions. The 2025 Vision and Strategy also aimed to enhance Jordan's business environment to attract foreign investments.

Coming to the Economic Modernisation Vision, it outlines over 300 initiatives across 35 sectors and sub-sectors, organised into eight primary drivers including:

- High-Value Industries: 104 initiatives across 9 sectors
- Future Services: 85 initiatives spanning 8 sectors
- Destination Jordan: 25 initiatives in 2 sectors.
- Sustainable Resources
- Investing in the Future
- Vibrant Communities
- Business Environment
- Agile Governance

To achieve the goals outlined in the Economic Modernisation Vision, the government has announced an Executive Programme focused on macroeconomic targets for 2025. It aims to raise the GDP growth rate at constant prices to 3%, increase exports to approximately $13.69 billion and boost net FDI to around $1.54 billion.

Strategic Goals at a Glance

- **Integrate over 1 million young men and women into the labour market.**
- **Achieve an average annual increase of 3% in per capita income.**
- **Elevate Jordan's position in the Global Competitiveness Index to the top 30th percentile.**
- **Double the percentage of Jordanians satisfied with their quality of life to 80%.**
- **Position at least one Jordanian city among the top 100 cities worldwide.**

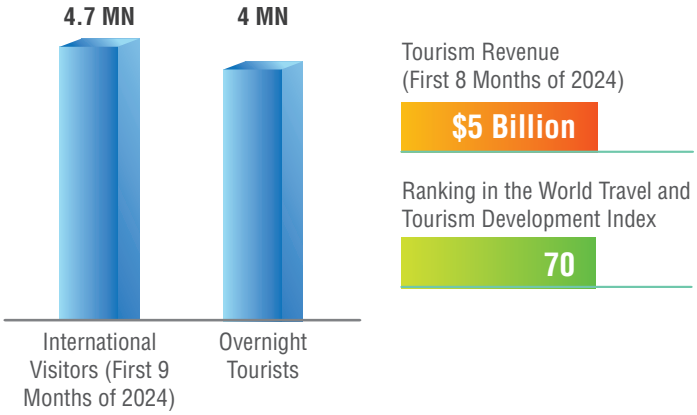


Dead Sea beach view from Kempinski Hotel, Jordan

Jordan Tourism Sector

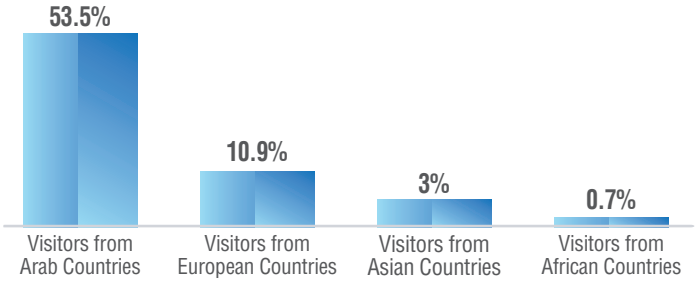
According to Jordan's Tourism Ministry, the country saw 4.7 million international visitors during the first nine months of 2024, making a revenue contribution of $4.95 billion. Having said that, the data reflects a 7% decrease in the number of tourists visiting Jordan during the first eight months of 2024 versus the same period in 2023.

Tourism Index (2024)

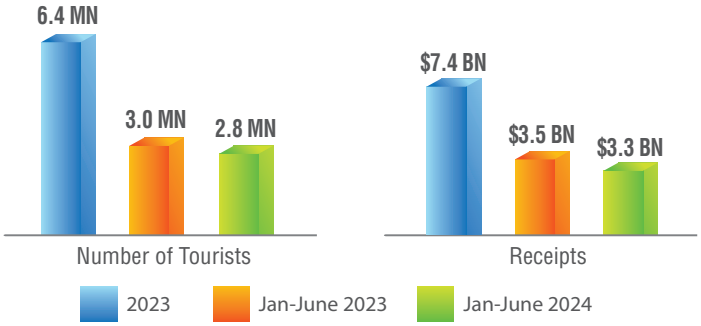


Sources: WEF Travel and Tourism Development Index & Tourism Ministry, Jordan

Tourist Arrivals (First 8 months of 2024)



Sources: Tourism Ministry, Jordan



Source: Ministry of Tourism and Antiquites, Tourism Quarterly Review H1

In 2023, Jordan witnessed a peak in tourism, welcoming 6.35 million international visitors and generating $7.40 billion in revenue. However, this upward trend was disrupted by the war in Gaza, which started in November 2023 and extended into 2024.

Jordan recorded 2.79 million tourists in the first half of 2024, exceeding the target for the period by 11%, yet representing a 7.9% decline compared to the same period in 2023. Similarly, tourism revenue for H1 2024 reached $3.27 billion, surpassing the target by 1.8%. Yet, it reflects a 4.9% drop from H1 2023.

Jordan's tourism sector is expected to be on track for recovery in 2025, supported by regional stability and strategic initiatives aimed at attracting visitors. The recent ceasefire in Gaza has boosted confidence among industry stakeholders, who anticipate a gradual increase in tourist arrivals. To sustain this momentum, Jordan is enhancing its tourism offerings, focusing on cultural heritage, adventure tourism and sustainable travel. The Jordan Tourism Board's Vision 2025 aims to provide a unique travel experience that blends luxury, history and adventure, catering to a diverse audience.

Meanwhile, understanding the importance of market diversification, Jordan is targeting more resilient markets less affected by regional conflicts. This strategy is designed to maintain a steady flow of visitors and minimise potential downturns. Moreover, Jordan's tourism efforts have gained international recognition, with the country ranking 13th on BBC Travel's list of top destinations for 2025, reinforcing its growing reputation as a leading travel hotspot in the Middle East.

Looking ahead, tourism is expected to be a key driver of economic recovery. By leveraging its rich history, varied landscapes and strategic development plans, Jordan aims to attract both international and domestic travellers, strengthening its position as a top regional destination.

7 UNESCO World Heritage Sites

33,000+ Hotel Beds in Strategic Locations

100,000+ Archaeological Sites



Royal tombs in Petra, Jordan

Jordan Leisure & Entertainment Industry

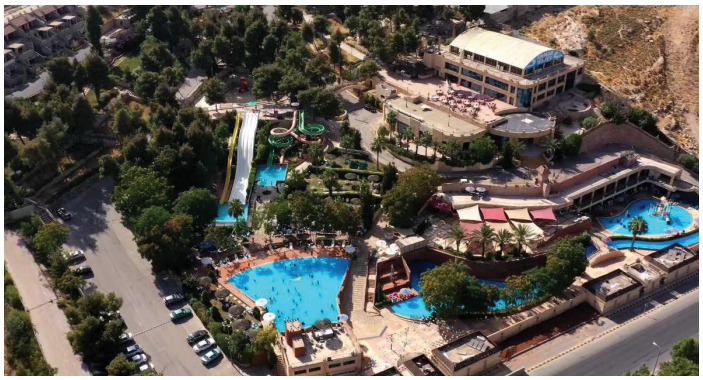
Jordan's leisure & entertainment industry is undergoing gradual development, supported by government initiatives and private investments. The country's rich cultural heritage and strategic location make it an attractive destination for regional tourism. Efforts to enhance tourism infrastructure, such as the development of new entertainment venues and amusement parks, aim to diversify Jordan's tourism offerings.

Key Leisure & Entertainment Operators

- Amman National Park
- Amman Waves
- Aqaba Aquarium
- Aqua Fun Center
- Dream Park
- FRESH EYE
- Fun Shake
- Galaxy Park
- Gravity Indoor Trampoline Park
- Happy Fun Zone Cinema & Waterpark
- INCEPTION Gaming Cente
- Irbid Amusement Park
- Jingos Jungle
- Jump Park
- Jungle Bungle
- La Cueva Water Park
- Magic Land
- Play Park Galleria Mall
- Saraya Aqaba Waterpark
- The Baptism Site of Jesus Christ
- The Escape Jordan
- The Jordan Museum
- The Terminal VR
- VR Zone Events Center
- Wadi Rum Protected Area



Petra by Night



Amman Waves



Children's Museum Jordan, Amman



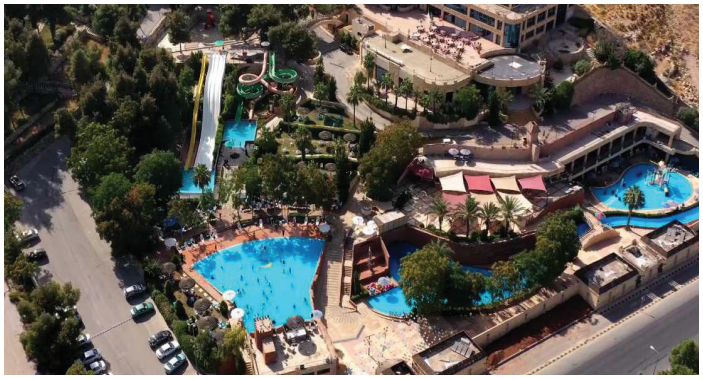
The Jordan Museum, Amman



Saraya Aqaba Waterpark



Royal Automobile Museum, Amman



Amman Waves Water Park & Resort



Ayla Oasis, Aqaba



Dream Park



Galaxy Park



Jingo's Jungle, Amman



Climbat, Amman



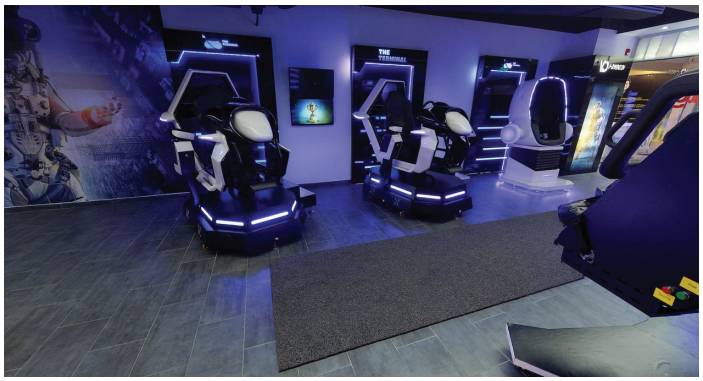
Gravity Indoor Trampoline Park



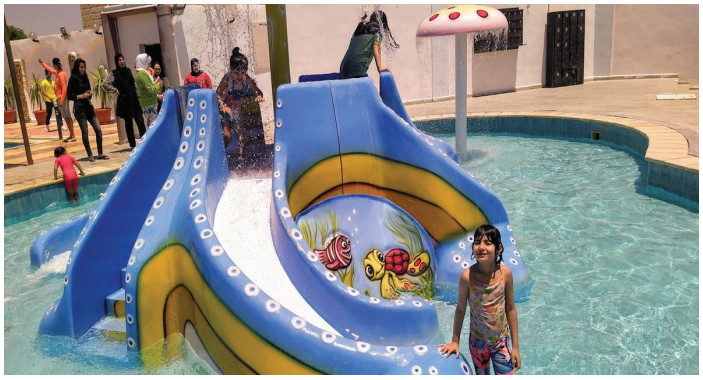
Jump Park



The Escape Jordan



The Terminal VR



Irbid Amusement Park



La Cueva Water Park, District Dead Sea Jordan



Happy Fun Zone Cinema and Waterpark



Play Park Galleria Mall, Amman



Roman Amphitheatre in Jerash, Jordan

Upcoming Mega Projects at a Glance

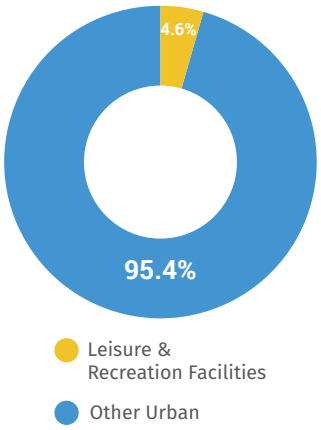
Jordan's tourism sector faced challenges in 2024, with revenues declining by 2.3% compared to 2023. The ongoing Israel-Hamas conflict significantly impacted tourism, leading to a 3.9% decrease in visitor numbers, totalling 6.1 million. Iconic sites such as Petra experienced reduced footfall, with hotel occupancy dropping to 10%. However, according to a Reuters report, early 2025 showed signs of recovery, with tourism revenues increasing by 16.3% in the first two months, driven by a 12% rise in visits from Jordanian expatriates and a 16.7% increase from Arab tourists. Overall, while geopolitical tensions have posed challenges, Jordan's tourism and retail sectors exhibit resilience, with early 2025 indicators suggesting a potential rebound.

Jordan's Leisure & Recreation Market Distribution

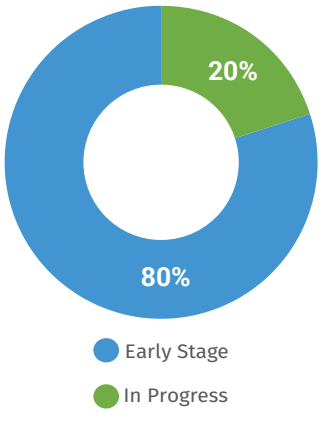


Source: BNC

Contribution of Leisure & Recreation Industry to Jordan's Urban Sector

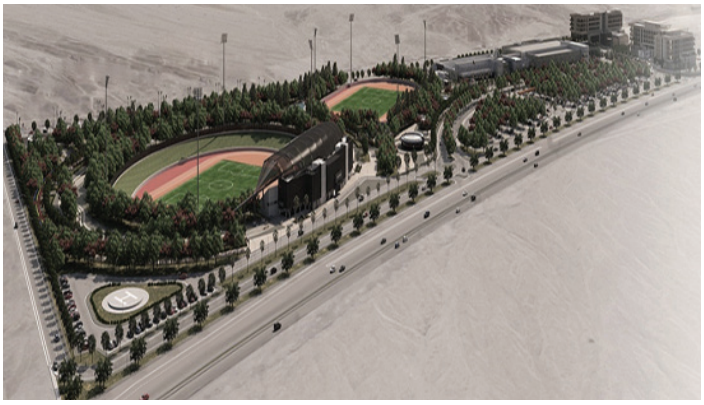


Stage-wise Distribution



Sports City - Aqaba Special Economic Zone

Value: USD 215 million
Stage: Concept
Developers: Aqaba Development Corporation, Aqaba Special Economic Zone Authority
Description: The project spans 400,000 sqm and features a FIFA-standard football stadium with 5,000 seats, expandable to 30,000. It includes a training football ground with a track, multiple outdoor courts for various sports, an indoor hall with multi-sport pitches, a fitness centre, billiards, table tennis, bowling alleys and an Olympic natatorium. Amenities include restaurants, cafes, three boutique hotels (4- and 5-star), an office building for administration and a medical clinic with a therapy centre.
Completion: Q4 2028



Science Hub and Public Aquarium - Aqaba

Value: USD 30 million
Stage: Tender
Developers: Aqaba Development Corporation
Description: The project involves the construction of a world-class science hub and public aquarium in Aqaba. This project will be a cornerstone of Jordan's vision for sustainable tourism and environmental stewardship, representing a significant step in Aqaba's journey towards becoming a leading global destination.
Completion: Q3 2027



Crystal City - Dead Sea

Value: USD 30 million
Stage: Tender
Developers: Aqaba Development Corporation
Description: Crystal City lies on a superb site at the mouth of the Wadi Ma'in at the Dead Sea, with views into a dramatic gorge and over the sea. A mixed-use development, it is planned as a major tourist destination for Jordan. A gated residential development, a 5-Star hotel, a water park, a beach club, swimming pools, promenades and an amphitheatre.
Completion: Q3 2027



Abdali Project, Phase II

Value: USD 30 million
Stage: Tender
Developers: Aqaba Development Corporation
Description: The project involves building a state-of-the-art science hub and public aquarium in Aqaba, marking a key milestone in Jordan's efforts to promote sustainable tourism and environmental leadership while positioning Aqaba as a premier global destination. Includes the construction of a multi-use conference centre that can accommodate 25,000 people, in addition to two towers that include hotels, residential apartments, commercial centres and advanced medical facilities.
Completion: Q3 2027



Tourist Village - Southern Red Sea port

Value: USD 565 million
Stage: Concept
Developers: Ministry of Investment
Description: The project involves the construction of a tourist village in the Southern Red Sea port of Aqaba. It will encompass a wide range of tourist and amusement facilities.
Completion: Q4 2029



Marina & Yacht Club – Zayed Riviera – Marsa Zayed Development

Value: USD 120 million
Stage: Concept
Developers: Abu Dhabi Ports Co. (ADPC), Mag Group FZE
Description: The project involves the construction of a marina within Zayed Riviera, Aqaba, featuring 1,260 residential units, 117 retail spaces and a state-of-the-art yacht club. Zayed Riviera within the Marsa Zayed development will comprise of four residential towers, a marina with approximately 1,260 residential and 117 retail units, a hotel and hotel apartments with a beach club and an Old Souq marketplace with 50 retail shops. The project also includes the restoration of the iconic Aqaba Minaret, featuring a yacht club & marina and a visitors' centre.
Completion: Q2 2030



Marina Village – Aqaba

Value: USD 81 million
Stage: Ongoing
Developers: Ayla Oasis Development Co.
Description: The Marina Village attracts around one million visitors annually, with significant growth expected following these new investments by Ayla that will integrate sustainable hospitality, retail and entertainment components. The development transforms the area into a true oasis with an expanded seafront, sandy beaches, hotels, unique residential complexes, commercial and entertainment facilities.
Completion: 2026



Madaba Cultural & Entertainment Center

Value: NA
Stage: Ongoing
Developers: Ministry of Tourism & USAID funding
Description: A mixed-use cultural hub with museum, amphitheatre and digital experience centre.
Completion: 2027



Al Maabar Amman Waterfront Promenade

Value: NA
Stage: Planning
Developers: Al Maabar International Investments
Description: The development includes a leisure marina, water sports zone, cafes and kids' entertainment hub.
Completion: 2029





Panorama of Salt town, Jordan



Central Bank of Libya, Tripoli



STATE OF LIBYA

Libya's economy remains heavily reliant on oil. To diversify its economy and attract investments, the country is focusing on several strategic sectors including renewable energy, agriculture, tourism, digital services and logistics. While challenges like political fragmentation and infrastructure deficits persist, ongoing reforms and sectoral diversification efforts could support Libya to attract investments that can drive economic growth and resilience.

Geography

Located in North Africa, Libya is the fourth-largest country on the continent, covering approximately 1.76 million square kilometres (sq km). It is bordered by the Mediterranean Sea to the north, Egypt to the east, Sudan to the southeast, Chad and Niger to the south and Algeria and Tunisia to the west. The country is dominated by the Sahara Desert, with most of its population concentrated along the Mediterranean coastline in cities including Tripoli and Benghazi. Libya's vast desert landscape is rich in natural resources, particularly oil and natural gas, which are critical to its economy.

Historically, Libya has been influenced by various civilizations, such as the Phoenicians, Greeks and Romans. It later became part of the Islamic Caliphates and the Ottoman Empire before falling under Italian colonial rule in the early 20th century. Libya gained independence in 1951 under King Idris but underwent a significant political shift in 1969 when Muammar Gaddafi seized power. His rule lasted until 2011, when the Arab Spring-inspired uprising led to his overthrow and subsequent instability. Since then, Libya has struggled with political fragmentation, armed conflicts and a transitional government attempting to restore stability.

Libya's strategic importance stems from its vast energy resources and geographical position. As a major oil producer with some of the world's largest proven reserves, Libya plays a key role in global energy markets. Its proximity to Europe also makes it a crucial partner in energy exports and migration control. Additionally, Libya's location at the crossroads of North Africa and the Middle East gives it geopolitical significance in regional security and trade. While ongoing political challenges persist, Libya's natural wealth and strategic location continue to attract international interest, making its stability essential for economic and political dynamics in the region.

Population

According to the World Population Review, Libya's population stood at 7.4 million in 2024, up from 7.3 million in 2023, and is projected to reach 7.9 million by 2030. The median age in Libya is 25.8 years and average life expectancy is 72.1 years.



Libya at a Glance

Official Name	State of Libya
Land Area	1.8 Million sq km
Capital	Tripoli
Government	In transition
Prime Minister	Abdul Hamid Dbeibeh
Population (2024)	7.4 Million
Population Density	4.2 per sq km
Population Growth	1.2%
Nationality Split	Arab and Arab-Berber descent
GDP (2023)	$45.1 Billion
GDP Per Capita (2023)	$6,173
GDP Growth (2023)	10.2%
Inflation – Consumer Prices (2023)	2.4%
Industries	Agriculture and food; construction; oil and gas; steel and iron; textiles
Independence Day	December 24, 1951
Official Languages	Arabic
Dominant Religion	Islam
Currency	Libyan Dinar
Time Zone	Eastern European Time (GMT+2)
Calling Code	+218

Sources: The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	631,500	324,300	307,200
5 – 9	686,200	352,300	333,900
10 – 14	705,700	362,200	343,500
15 – 19	677,200	348,900	328,300
20 – 24	605,800	310,500	295,300
25 – 29	548,300	280,000	268,300
30 – 34	521,200	267,400	253,800
35 – 39	532,400	272,700	259,700
40 – 44	554,600	285,200	269,400
45 – 49	533,600	272,500	261,100
50 – 54	452,000	229,500	222,500
55 – 59	330,500	163,500	167,000
60 – 64	231,900	114,000	117,900
65 – 69	142,100	68,400	73,700
70 – 74	99,100	44,900	54,200
75 – 79	66,200	28,800	37,400
80+	62,988	28,019	34,969

Source: World Population Review

Population Per City (2024)



Source: World Population Review

Economy

Libya remains divided over the management and distribution of its oil wealth, with ongoing disputes surrounding the Central Bank of Libya (CBL). Tensions escalated after efforts to unify the stalled national budget, leading to disagreements over the appointment of the CBL's Governor and Board.

According to the World Bank, Libya's economy is heavily reliant on oil & gas, which accounted for 60% of the GDP, 94% of exports and 97% of government revenues in 2023. Oil production averaged 1.2 million barrels per day (mbpd) in early 2024 but dropped to 0.5 mbpd following the East-based government's blockade, costing Libya $120 million in just three days. Declining oil prices had already reduced revenues, with earnings down 5.4% year-on-year in mid-2024.

On the other hand, the country's private sector is weak, employing only 14% of the workforce, while unemployment remains high at 15.3%, with even higher rates for women (18.4%) and youth (23.1%). Social conditions have worsened due to income disparities, inadequate services and infrastructure challenges, particularly after the severe flooding in Derna in 2023 and Ghat & Tahala in 2024.

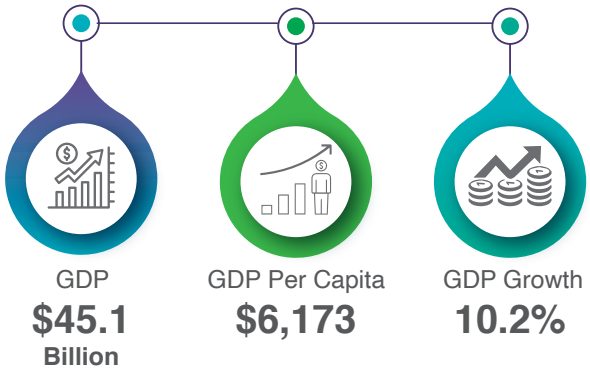
If political factions resolve the CBL dispute, oil production is expected to resume, though oil GDP will contract by 15%, shrinking the overall GDP by 10% in 2024. However, a rebound is expected in 2025-26, with GDP projected to grow by 12%. Inflation is likely to remain stable at 2.5%, assuming political stability and moderating global commodity prices. Meanwhile, fiscal and external deficits are expected to widen in 2024 before improving with oil recovery.

Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	-10.1%	10.7%	13.1%
CPI Inflation (Average)	2.5%	2.4%	2.9%
Exports (Growth)	-16.8%	23.1%	18.8%
Imports (Growth)	-2.4%	2.0%	2.0%

Source: World Bank

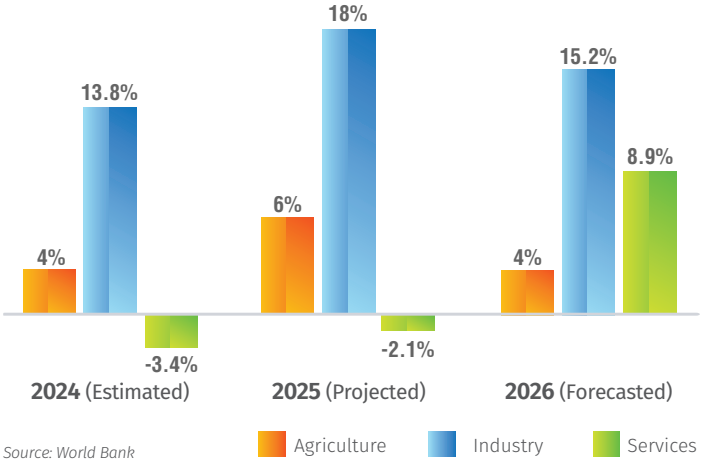
Looking ahead, prolonged instability could further disrupt oil exports, imports and public sector salaries, worsening security conditions. A swift resolution is crucial to stabilising Libya's economy and ensuring long-term diversification beyond oil dependence.

State of Economy Highlights (in 2023)



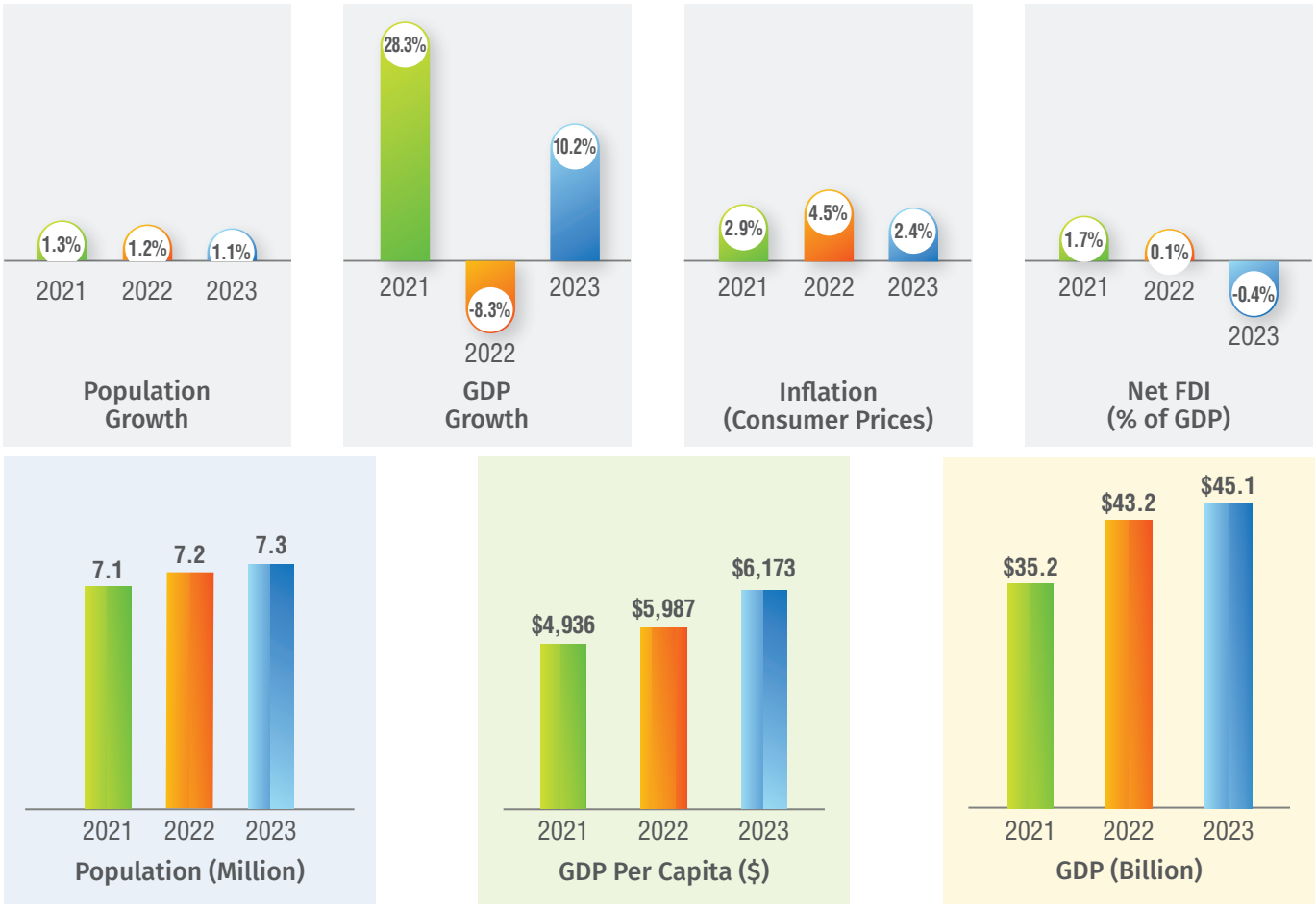
Source: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

Key Macroeconomic Highlights



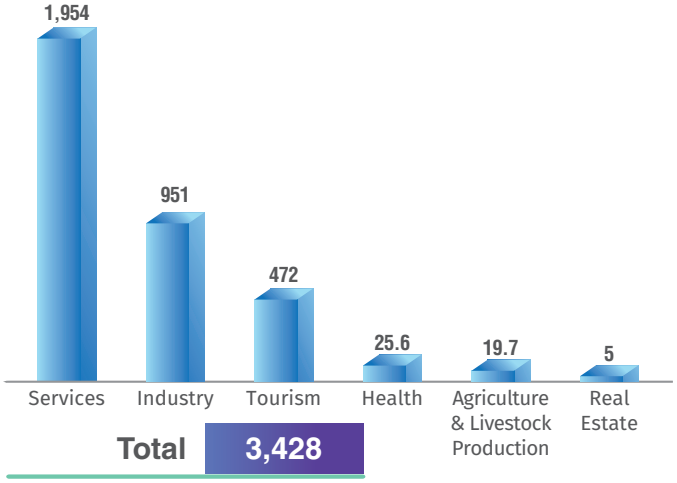
Sources: World Bank

Investment

The World Bank's Libya Economic Monitor (Fall 2024) indicates that Libya's net inflow of foreign direct investment (FDI) recorded a 260% increase in 2023 driven by the return of three major oil firms to the country after a decade's absence, coupled with the signing of large hydrocarbon contracts.

Having said that, according to an African Development Bank report released in 2024, despite significant investment potential across various sectors, FDI has remained stagnant since 2014 due to political instability and ongoing uncertainties in Libya. Structural reforms are needed to remedy the economic situation. The lack of FDI inflows is preventing the country from undertaking economic diversification with an aim to move away from its heavy reliance on hydrocarbon-based revenues.

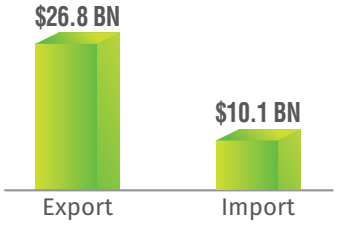
Sectoral Distribution of Inward FDI Stocks



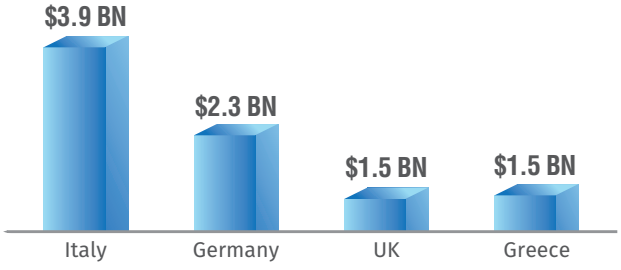
Inward FDI Stocks refer to the total accumulated value of FDI made into a country over time.
Source: General Authority for Investment Promotion and Privatisation Affairs

Meanwhile, according to the UNCTAD World Investment Report 2023, Libya's estimated FDI inward stock stood at $18.4 billion in 2023, while FDI outward stock was $20.2 billion.

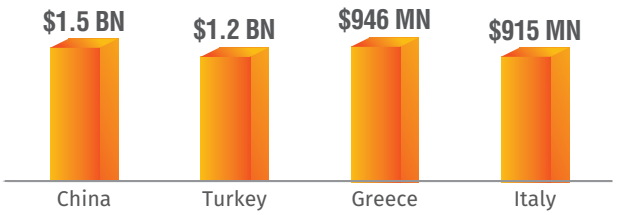
Libya's Export-Import Overview (H1-2024)



Top Export Destinations (H1-2024)



Top Import Destinations (H1-2024)

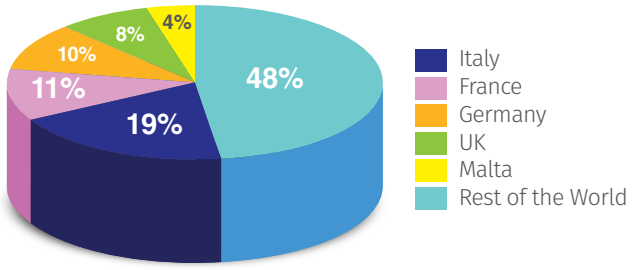


Source: Central Bank of Libya

Libya Tourism Sector

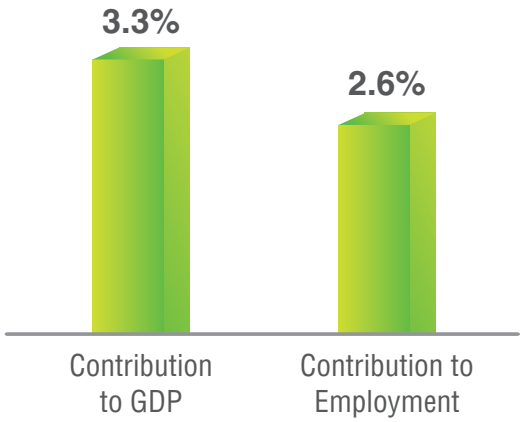
According to an International Monetary Fund (IMF) report, Libya has strong potential for a thriving tourism sector, supported by its rich heritage, historical landmarks, strategic location and pleasant Mediterranean climate. However, political instability remains the primary hurdle. Additionally, investment in essential infrastructure, such as airports and hotels, is crucial for the sector's growth.

Inbound Arrivals (2023)



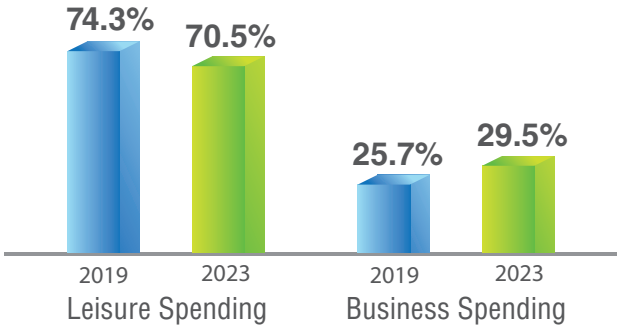
Sources: Oxford Economics, UN Tourism

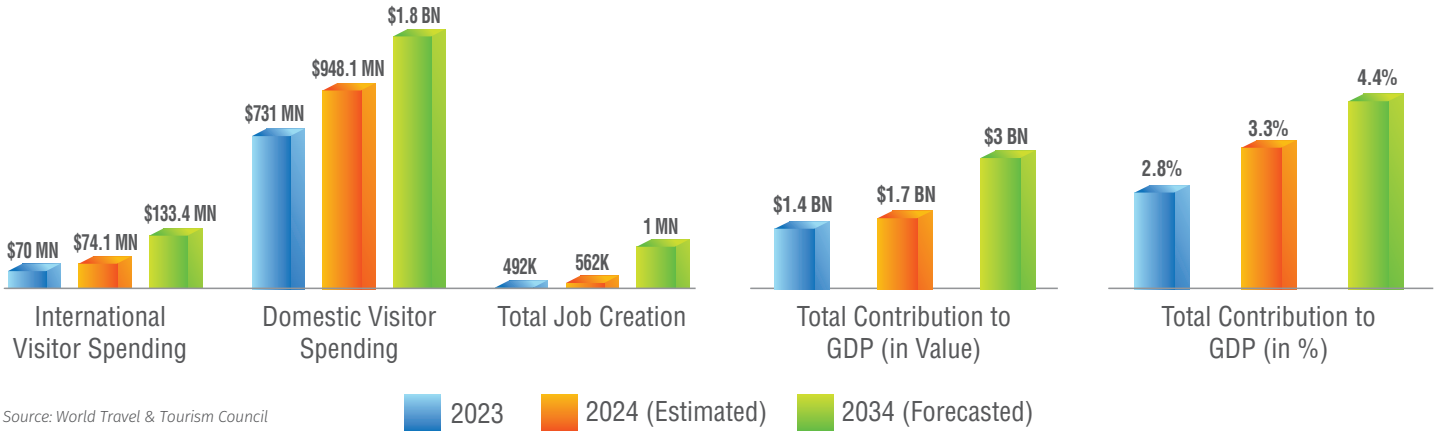
Tourism Index (2024)



Source: World Travel and Tourism Council

Leisure Spending Snapshot





Source: World Travel & Tourism Council



Oasis in the Awbari Sand Sea, Sahara Desert, Libya

Libya Leisure & Entertainment Industry

Libya's tourism, hospitality, leisure & entertainment and retail sectors hold significant potential but remain largely untapped due to political instability and infrastructure challenges. With its rich cultural heritage, Mediterranean coastline and UNESCO-listed archaeological sites, Libya has the foundation for a thriving tourism industry. However, security concerns and limited investment have hindered growth.

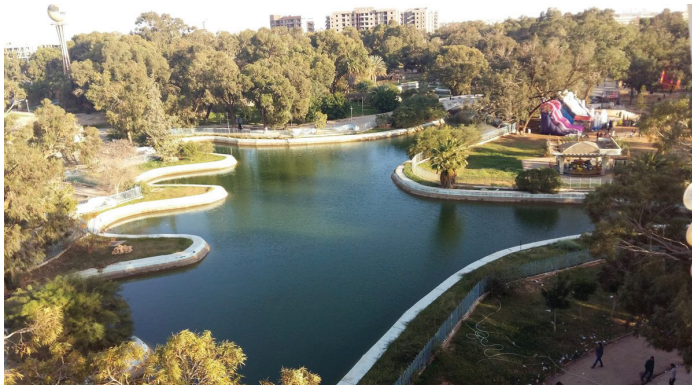
The country's leisure & entertainment sector is gradually evolving despite facing significant hurdles. Existing facilities, such as the Silphium Family Entertainment Center, offer residents and visitors indoor games and activities, contributing to the country's limited but growing portfolio of leisure options. Meanwhile, a significant initiative is the transformation of the former Bab al-Aziziya compound in Tripoli into a public amusement park and green space. This project aims to create a family-friendly recreational area, signalling a commitment to revitalising urban spaces for public enjoyment.

Key Leisure & Entertainment Operators

- Aqua Park, Tripoli
- Silphium Family Entertainment Center, Tripoli



The ruins of ancient Leptis Magna Roman Colony, UNESCO World Heritage Site



Il Bosco, Benghazi



Aqua Park, Tripoli



Silphium Family Entertainment Center, Tripoli



The Arch of Roman Emperor Marcus Aurelius, Tripoli, Libya



Nouakchott Mosque, Mauritania



ISLAMIC REPUBLIC OF MAURITANIA

Mauritania's economy is poised for growth, driven by the commencement of gas exports from the Greater Tortue Ahmeyim project that's expected to generate approximately $500 million annually. To attract foreign investments and diversify beyond its traditional reliance on mining and fisheries, Mauritania is focusing on sectors such as renewable energy, agriculture and infrastructure development.

Geography

Located in Northwest Africa, Mauritania spans approximately 1.03 million square kilometres (sq km). It borders the Atlantic Ocean to the west, Western Sahara to the north, Algeria to the northeast, Mali to the east and southeast and Senegal to the southwest. The country's landscape is dominated by the Sahara Desert, with vast dunes and arid plains. Despite its harsh climate, Mauritania has a long Atlantic coastline that supports fishing and trade. The Senegal River in the south provides a vital water source for agriculture and settlement.

Historically, Mauritania has been a crossroads of Berber, Arab and Sub-Saharan African cultures. The region was home to powerful nomadic tribes and trans-Saharan trade routes, connecting North and West Africa. The Almoravid dynasty, which originated in present-day Mauritania, played a crucial role in the spread of Islam across the region in the 11th century. Under French colonial rule from the early 20th century until its independence in 1960, Mauritania's economy was shaped by extractive industries and trade.

Strategically, Mauritania serves as a key link between North and Sub-Saharan Africa, bridging the Arab and African influences. It is rich in natural resources, including iron ore, gold, copper and offshore natural gas reserves, which contribute significantly to its economy. The country's coastal position also makes it an important player in West African trade and maritime security.

In recent years, Mauritania has strengthened its ties with regional and international partners to combat security threats, particularly in the Sahel. Its role in counterterrorism efforts and resource-driven economic potential make it a strategic country in Africa. Moving forward, infrastructure development, economic diversification and political stability will be crucial for Mauritania to maximise its geographic and economic advantages.

Population

According to the World Population Review, Mauritania's population stood at 5.2 million in 2024, up from 5 million in 2023, and is projected to reach 6.1 million by 2030. The median age in Mauritania is 21 years and average life expectancy is 68.9 years, according to the World Health Organization (WHO).



Mauritania at a Glance

Official Name	Islamic Republic of Mauritania
Land Area	1.03 Million sq km
Capital	Nouakchott
Government	Presidential republic
President	Mohamed Ould Ghazouani
Population (2024)	5.2 Million
Population Density	5.02 per sq km
Population Growth	3%
Nationality Split	Arab-Berber (Bidhan, Haratin)
GDP (2023)	$10.7 Billion
GDP Per Capita (2023)	$2,121
GDP Growth (2023)	6.5%
Inflation – Consumer Prices (2023)	5%
Industries	Fish, gold, iron ore
Independence Day	November 28, 1960
Official Languages	Arabic
Dominant Religion	Islam
Currency	Mauritanian Ouguiya
Time Zone	UTC+00:00
Calling Code	+222

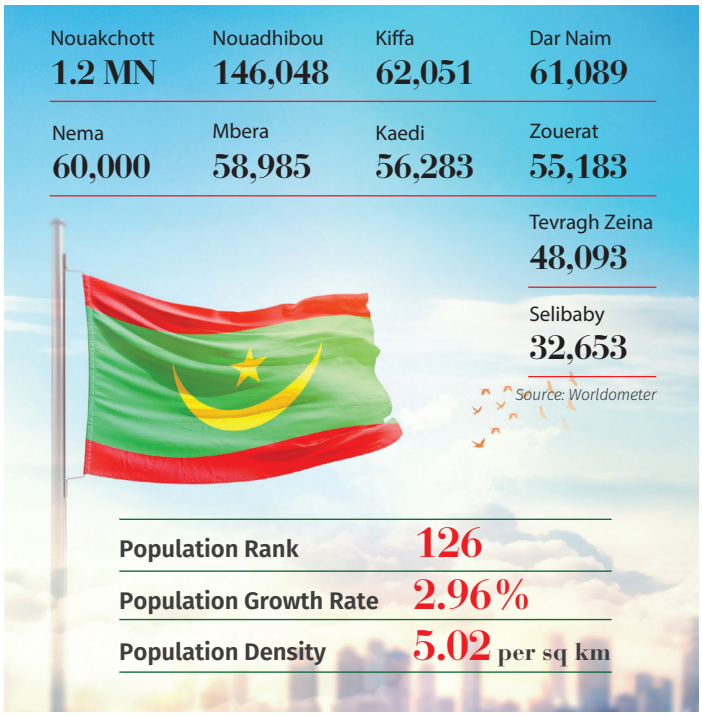
Sources: The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	814,400	412,300	402,100
5 – 9	734,500	371,500	363,000
10 – 14	659,000	334,000	325,000
15 – 19	561,200	280,800	280,400
20 – 24	461,400	225,900	235,500
25 – 29	388,000	186,600	201,400
30 – 34	327,300	155,500	171,800
35 – 39	275,400	129,600	145,800
40 – 44	225,900	105,100	120,800
45 – 49	185,000	85,300	99,700
50 – 54	153,300	71,300	82,000
55 – 59	122,500	57,300	65,200
60 – 64	95,200	44,700	50,500
65 – 69	69,800	32,600	37,200
70 – 74	46,700	21,500	25,200
75 – 79	28,100	12,500	15,600
80+	22,593	9,686	12,907

Source: World Population Review

Population Per City (2024)



Sources: World Population Review

Economy

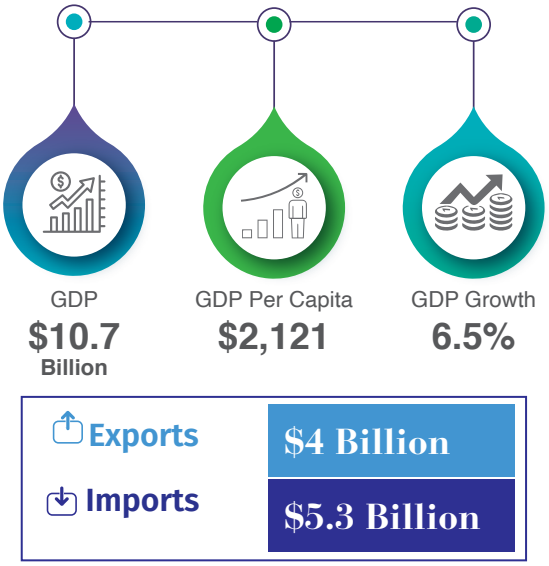
According to the World Bank, Mauritania's economy is expected to maintain strong growth in 2024 following a solid performance in 2023. Fiscal and external balances are set to improve, while inflation is projected to decline, supported by tighter monetary policy and lower food and energy prices. However, risks persist.

Economic growth is forecasted at 6.5% in 2024 (3.7% per capita), driven by a thriving services sector and a rise in iron ore and fish exports, which grew by 15% and 43% year-on-year, respectively, in the first half of 2024. Industrial production also expanded, increasing by 11.5% in early 2024, supported by strong mining, manufacturing and construction activity.

Inflation fell to 3% in July 2024, down from 4% a year earlier, and is expected to average 2.7% for the year. Rural poverty is projected to rise slightly from 41.6% in 2023 to 41.9% in 2024 due to a decline in agricultural output. However, urban poverty is expected to decrease from 13.7% to 12% as industrial and service sector gains improve per capita incomes. Overall, the national poverty rate is forecast to decline from 28.1% to 27.4%.

Looking ahead, growth is expected to accelerate in 2025-26, averaging 7.6% (4.8% per capita), driven by the launch of gas production, increased public investment, a stronger external position and sustained private demand. The industrial and services sectors will remain key contributors to GDP expansion, while inflation is expected to stabilise around 2%. Despite positive prospects, risks remain. Delays in the Greater Tortue Ahmeyim (GTA) gas project and slower growth among trading partners could impact medium-term economic performance. Additionally, Mauritania remains vulnerable to climate shocks such as droughts and floods, which threaten agricultural output and livelihoods, as well as ongoing regional security concerns in the Sahel.

State of Economy Highlights (in 2023)



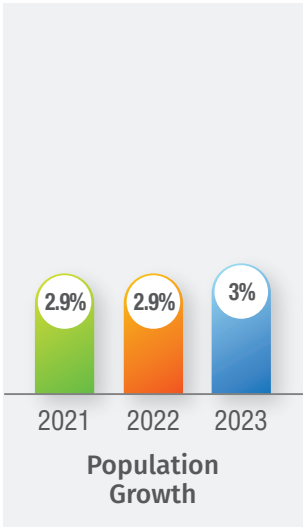
Source: World Bank

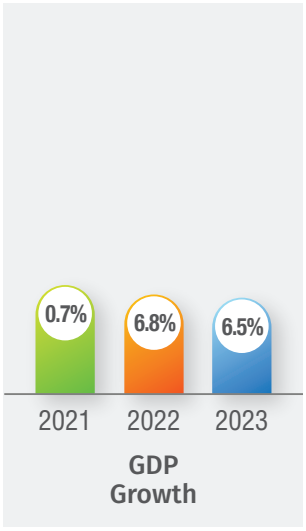
Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	6.8%	7.8%	7.5%
CPI Inflation (Average)	2.7%	2%	2%
Exports (Growth)	8.6%	12.3%	10.6%
Imports (Growth)	5%	4.6%	3.6%

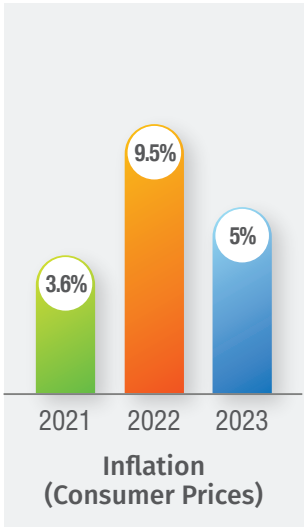
Source: World Bank

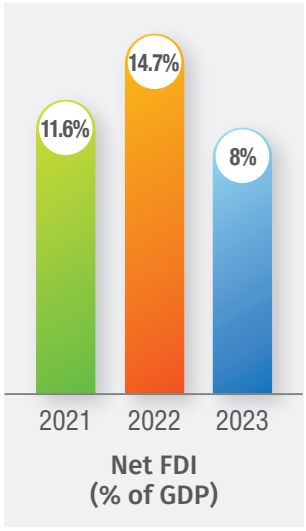

Sunset in Mauritania Desert

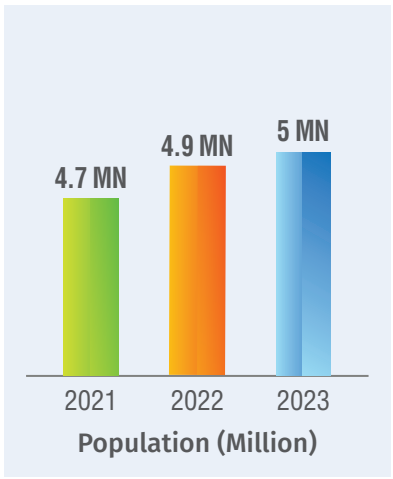
Key Macroeconomic Highlights



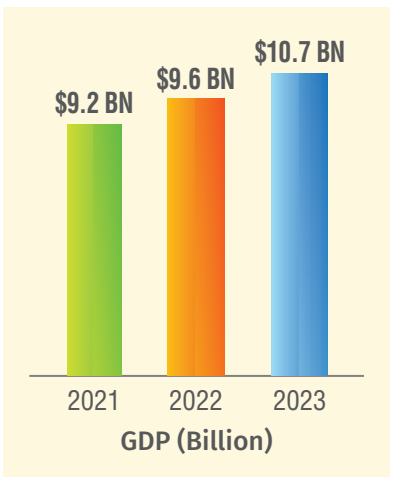






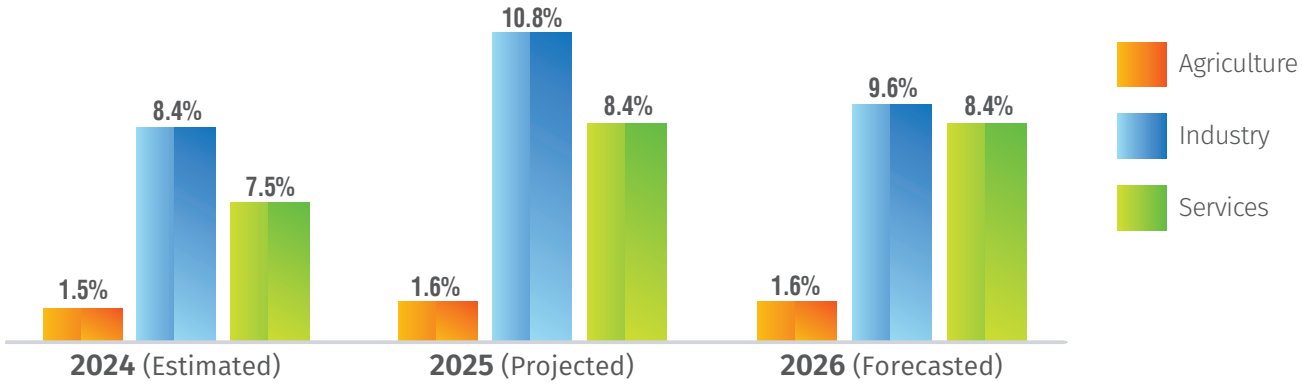






Sources: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank



Chinguetti Mosque, Mauritania

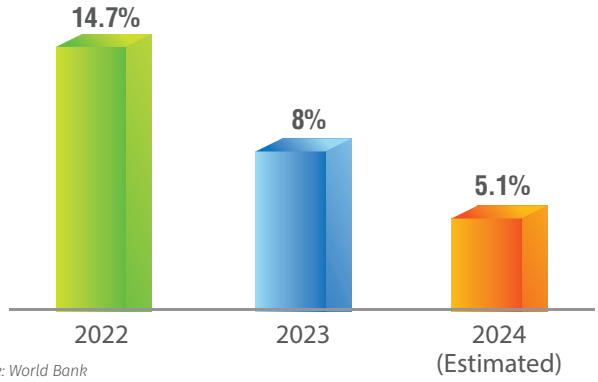
Investment

From 2009 to 2012, Mauritania saw its foreign direct investments (FDI) soar to nearly $1.4 billion, estimated the UN Trade and Development (UNCTAD). In 2022, the country's oil and gas sector accounted for a staggering 94% of FDI inflows. While energy has attracted most of the investments, other sectors are gaining traction, including banking, construction and infrastructure, information and communications technology (ICT) and emerging opportunities in green hydrogen.

Among the priority areas for further improvement, UNCTAD has identified Mauritania's investment code for which a new version was expected in early 2024. Another recommendation is to further integrate sustainable development considerations into the country's international investment agreements to ensure foreign investment contributes to broader development goals.

Overall, net FDI inflows have been consistently positive, according to the International Monetary Fund (IMF) with sharp increases during the 2010s and are projected to taper off but not reverse up to 2029. Some factors boosting FDI include adopting a new investment code, simplifying procedures to set up a business and establishing the Investment Promotion Agency of Mauritania.

FDI Net Inflows (% of GDP)



Source: World Bank

FDI Inflows



Source: UNCTAD

Mauritania Tourism Sector

Mauritania boasts a rich tapestry of natural landscapes and historical heritage sites. Notable attractions include the ancient cities of Chinguetti, Ouadane, Oualata and Tichit, which flourished during the trans-Saharan trade era and are renowned for their medieval architecture and invaluable manuscript collections. Additionally, the country's vast deserts, such as the Adrar Plateau and the Richat Structure, offer unique geological formations that intrigue both tourists and scholars. However, despite these assets, Mauritania's tourism industry remains underdeveloped.

Several factors including security concerns; lack of tourism related infrastructure; and environmental degradation threatening depletion of cultural landmarks and diminishing the aesthetic appeal contribute to Mauritania's low tourism influx. To revitalise its tourism sector, the country must enhance security measures, invest in infrastructure development, promote its unique cultural and natural attractions and implement policies that facilitate travel. Addressing environmental challenges, such as desertification, is also crucial to preserve the nation's heritage sites for future generations and potential tourists.



Aerial view of Richat structure, Mauritania

Mauritania Leisure & Entertainment Industry

Mauritania's leisure & entertainment sector is gradually evolving, with emerging investments aimed at enhancing family-oriented attractions. A notable development is the Dream Land amusement park, spearheaded by Rikaz Holding, which aims to stimulate local economic growth while also boosting tourism.

Despite such projects, the country's leisure infrastructure remains underdeveloped. To fully realise the potential of its leisure & entertainment industry, Mauritania must address infrastructural challenges, enhance regulatory frameworks and actively promote its offerings to both domestic and international audiences.

Key Leisure & Entertainment Operators

- Dreamland Ocean Park



Dream Land Ocean Park



Banc d'Arguin National Park



Iron Ore Train Experience



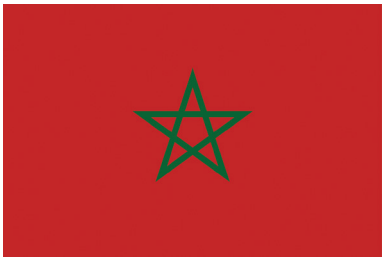
Nouakchott Camel Market



Terjit Oasis



Hassan II Mosque in Casablanca, Morocco



KINGDOM OF MOROCCO

Morocco's strategic location, historical depth and economic potential continue to make it a significant global player. In recent years, despite setbacks including earthquake and droughts, the country's robust recovery continues.

Geography

Morocco is in North Africa, bordered by the Atlantic Ocean and the Mediterranean Sea to the west and north, Algeria to the east and Western Sahara to the south. Covering approximately 716,300 square kilometres (sq km) Morocco features diverse landscapes, including the Atlas Mountains, the Sahara Desert and a long coastline. Its varied geography influences its climate, ranging from Mediterranean along the coast to arid conditions in the interior and desert regions.

The country boasts a rich history dating back to prehistoric times. It was home to the Berbers before experiencing influences from Phoenicians, Romans and later the Islamic Arab conquests in the 7th century. The Almoravid and Almohad dynasties expanded Morocco's influence across North Africa and Spain. The 17th-century Alaouite Dynasty, which still rules today, helped consolidate the nation. Morocco was a French and Spanish protectorate in the early 20th century before regaining independence in 1956 under King Mohammed V.

At the crossroads of Africa, Europe and the Middle East, Morocco holds a key geopolitical position. It controls the Strait of Gibraltar, a crucial global maritime route. As a gateway to Africa, Morocco maintains strong trade ties with the European Union (EU), the US and regional partners. It has a leading position in renewable energy, as a major non-NATO (North Atlantic Treaty Organization) ally of the US, and plays a vital role in regional security, economic development and diplomacy.

Population

According to the World Population Review, Morocco's population stood at 38.22 million in 2024, up from 37.7 million in 2023, and is projected to reach 40 million by 2030. The median age in Morocco is 29.5 years, making it a young country demographically.

Morocco's labour market recovery has remained sluggish, with employment and labour participation rates continuing their downward trend, further exacerbated by the recent economic slowdown, stated the OECD Economic Surveys Morocco (September 2024). Female labour force participation remained particularly low at 19% in 2023, compared to 69% for men, despite a temporary rise during the pandemic. Unemployment, which spiked during the pandemic, reached 13% in 2023, the highest level in two decades, while youth unemployment (aged 15-24) hit a record 35.8%.

Interestingly, around 9% of Morocco's adult population are entrepreneurs; however, 57% of them did not enter entrepreneurship by choice but out of necessity due to limited employment opportunities. Given Morocco's predominantly young population, there is significant potential to create high-quality, formal jobs and enhance the integration of women and youth into the labour market. To address these challenges, the government has set a target of creating 400,000 new jobs by 2026, with demand for skilled workers steadily increasing.



Morocco at a Glance

Official Name	Kingdom of Morocco
Land Area	716,300 sq km
Capital	Rabat
Government	Parliamentary constitutional monarchy
King	His Majesty King Mohammed VI
Head of Government	Aziz Akhannouch
Population (2024)	38.2 Million
Population Density	85.3 per sq km
Population Growth	1%
Nationality Split	Arabs (67%), Berbers (31%) and Sahrawis (2%)
GDP (2023)	$144.4 Billion
GDP Per Capita (2023)	$3,771
GDP Growth (2023)	3.4%
Inflation – Consumer Prices (2023)	6.1%
Industries	Art & craft, construction, food processing, leather goods, phosphate rock mining and processing, textiles and tourism
Independence Day	November 18, 1956
Official Languages	Arabic and Amazigh
Dominant Religion	Islam
Currency	Moroccan Dirham
Time Zone	Western European Time (WET) GMT+1 (UTC+1)
Calling Code	+212

Sources: The CIA World Factbook, World Bank & World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	3,145,700	1,606,500	1,539,200
5 – 9	3,255,200	1,668,500	1,586,700
10 – 14	3,360,400	1,726,400	1,634,000
15 – 19	3,190,400	1,632,200	1,558,200
20 – 24	2,930,900	1,503,100	1,427,800
25 – 29	2,863,000	1,463,700	1,399,300
30 – 34	2,915,500	1,489,900	1,425,600
35 – 39	2,846,500	1,439,200	1,407,300
40 – 44	2,642,900	1,327,100	1,315,800
45 – 49	2,356,500	1,174,400	1,182,100
50 – 54	2,062,100	1,029,900	1,032,200
55 – 59	1,810,800	890,400	920,400
60 – 64	1,601,800	786,500	815,300
65 – 69	1,295,400	646,900	648,500
70 – 74	883,400	431,200	452,200
75 – 79	511,300	228,100	283,200
80+	409,069	157,853	251,216

Source: World Population Review

Population Per City (2025)



Source: World Population Review

Economy

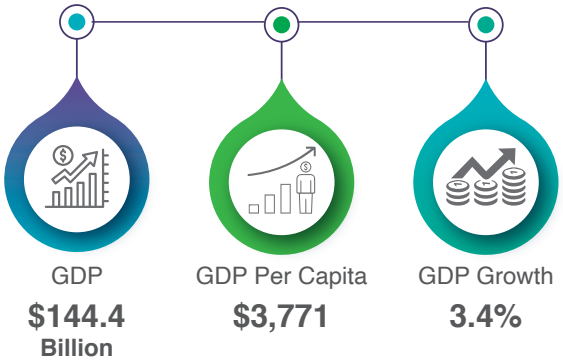
According to the World Bank, Morocco's real GDP growth slowed to 2.9% in 2024 but is projected to rise to 3.9% in 2025. This fluctuation is largely driven by volatility in the agricultural sector, which contracted by 4.6% in 2024 but is expected to rebound by 8.2% in 2025, provided climatic conditions improve. During the first quarter of 2024, agricultural output declined significantly, with cereal production dropping by 43% due to severe drought conditions.

In contrast, non-agricultural sectors remained more stable, growing by 3.5% and expected to slightly accelerate to 3.7% in 2024. Growth in this sector is supported by strong phosphate production, export-driven manufacturing and a recovering construction industry. The construction sector is benefiting from a new homebuyer assistance programme, declining interest rates, post-earthquake reconstruction efforts and preparations for major sporting events, including the 2030 FIFA World Cup.

Additionally, robust tourism revenues, strong exports and steady remittance inflows have helped maintain a low current account deficit. Morocco is also making strides in climate resilience and leveraging opportunities in decarbonization.

Domestic demand is on the rise, reinforcing economic stability. Despite facing multiple external shocks – including the COVID-19 pandemic, prolonged drought, inflationary pressures from high commodity prices and a devastating earthquake – Morocco has demonstrated strong economic resilience, supported by a sound macroeconomic policy framework.

State of Economy Highlights (in 2023)

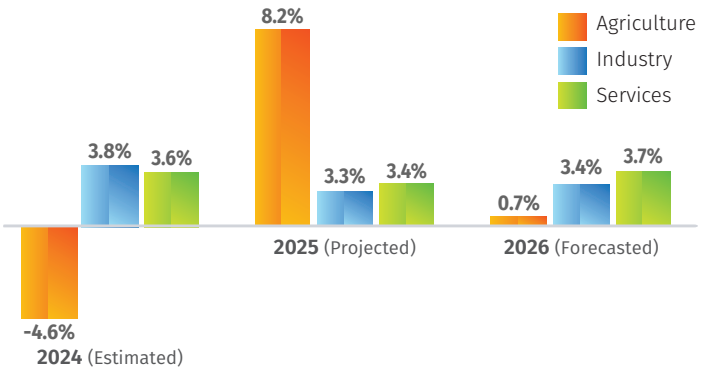


Source: World Bank

Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	2.9%	3.9%	3.4%
CPI Inflation (Average)	1.5%	2.7%	2.4%

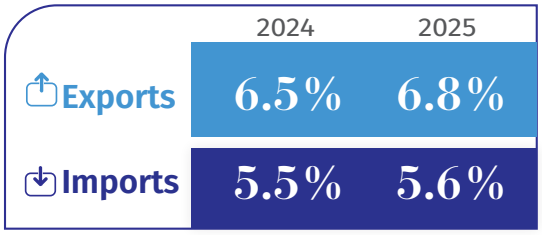
Source: World Bank

Real GDP Growth by Sector (in %)



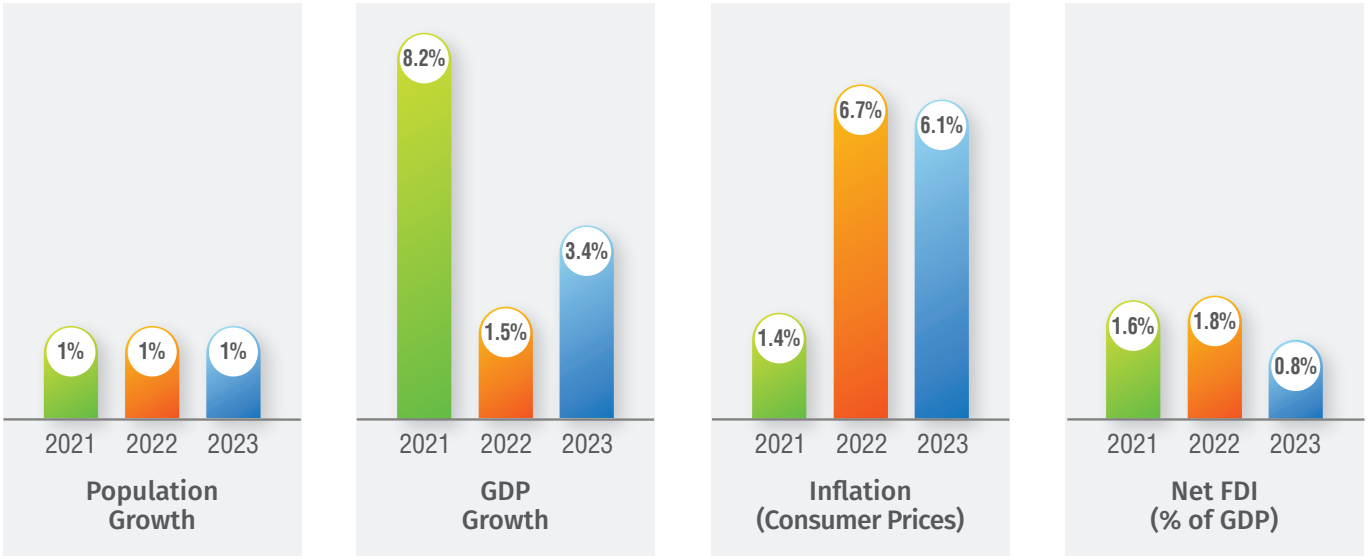
Source: World Bank

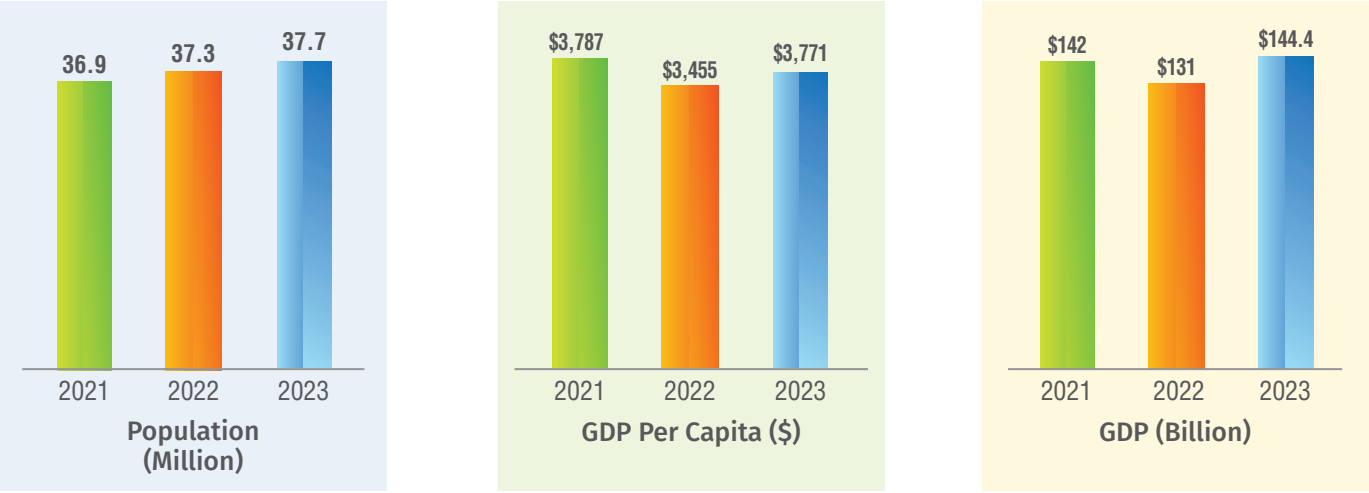
Growth Estimates



Note: Percentage changes, volume (2014 prices)
Sources: Morocco National Accounts, Ministry of Economy and Finance, OECD Economic Outlook

Key Macroeconomic Highlights





Source: World Bank

Investment

According to the OECD Investment Policy Reviews – Morocco 2024, by the end of May 2024, foreign direct investment (FDI) receipts reached $1.74 billion, a 20% increase compared to 2023. Notably, it represented the second-highest FDI inflow recorded during the first five months of a year in Morocco's economic history.

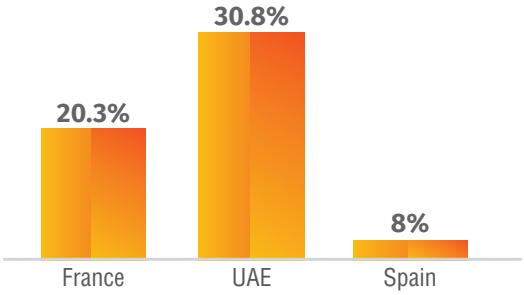
After what was a "weak" 2023, Morocco's net FDI flows more than doubled during the first five months of 2024, World Bank indicated. Looking ahead, FDI inflows are expected to accelerate as greenfield projects take shape.

Share of FDI

Net FDI (% of GDP)	0.2% 2023	0.9% 2024

Source: IMF

FDI Inflow by Source Country (2023)



Source: OECD Economic Surveys Morocco (September 2024)

Morocco's New Development Model

Launched in 2021 under the leadership of King Mohammed VI, Morocco's New Development Model (NDM) is a long-term strategy aimed at accelerating economic growth, improving social inclusion and enhancing governance. The model was developed to address structural challenges such as economic inequality, unemployment and gaps in education and healthcare. It serves as a roadmap for Morocco's development up to 2035, aligning with global trends and national priorities. With NDM 2035, Morocco aims to solidify its position as a regional economic leader, leveraging its strategic location, investment climate and sustainable development policies.

Strategic Goals at a Glance

Economic Transformation & Job Creation

- Annual GDP growth of 6% and increasing GDP per capita to $16,000 by 2035.
- Create high-quality jobs to reduce unemployment to 6%, with a focus on integrating youth and women into the workforce.
- Encourage private sector investment and entrepreneurship to drive economic diversification.

Green Growth & Sustainability

- Expand renewable energy sources to exceed 50% of total energy consumption by 2030.
- Strengthen water management, climate resilience and sustainable agriculture.

Innovation, Education & Human Capital

- Reform the education system to rank among the top 50 globally.
- Promote research and development (R&D) and fostering a knowledge-based economy.

Social Inclusion & Improved Living Standards

- Implement universal healthcare and social protection programme.
- Enhance affordable housing and infrastructure to improve citizens' quality of life.

Good Governance & Institutional Reforms

- Strengthen transparency, public administration efficiency and local governance.
- Encourage regional development and decentralisation to ensure balanced growth.

Tangier, on the African side of the Strait of Gibraltar, Morocco

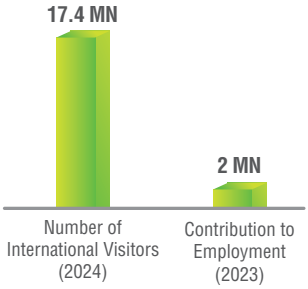


Morocco Tourism Sector

Tourism plays a key role in Morocco's NDM 2035 as a strategic sector for economic growth, job creation and global positioning. The plan aims to boost Morocco's appeal as a premier global destination while ensuring sustainability and diversification in tourism offerings.

Importantly, as Morocco became the "most-visited country in all of Africa," according to the UN Tourism data, the country's tourism sector accounted for 7% of its GDP in 2023 and generated over two million jobs. In addition, greenfield investments in the tourism sector totalled $2.6 billion between 2015 and 2024.

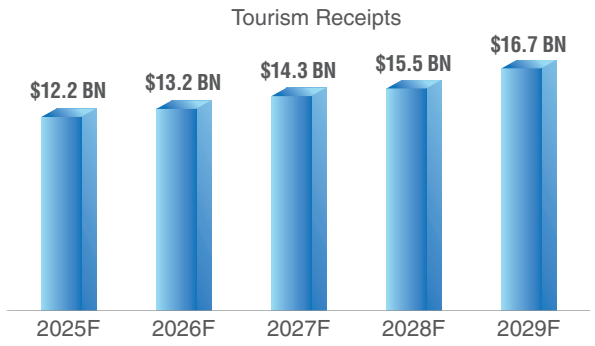
Tourism Index (2024)

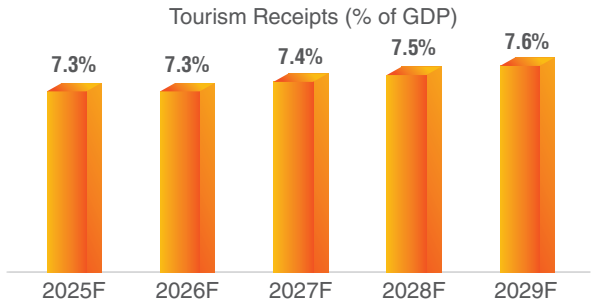


Ranking in the World Travel & Tourism Development Index	82
Contribution to GDP (2023)	7%
Tourism Revenue (2024)	$11 BN

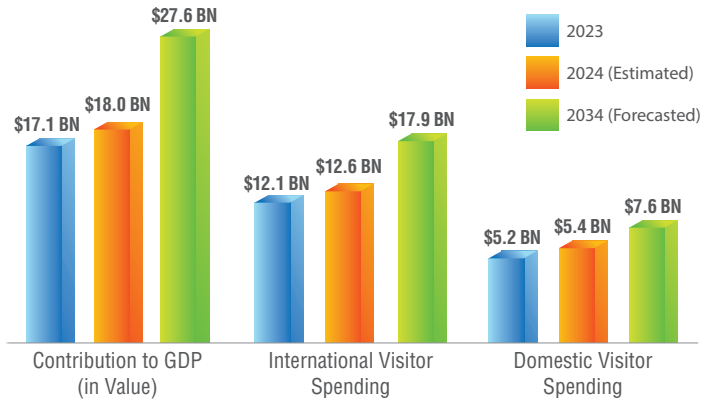
Sources: WEF Travel and Tourism Development Index & Ministry of Tourism, Morocco

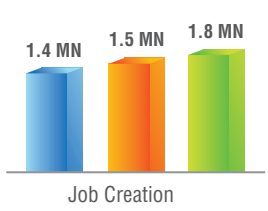
Tourism Receipts 2025-29

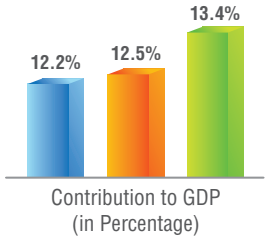




Source: IMF *F: Forecasted*





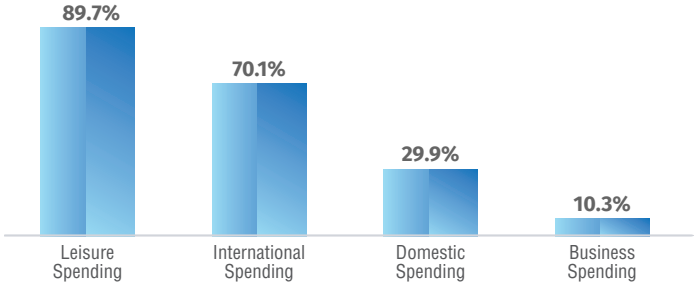


Source: World Travel & Tourism Council

Morocco Leisure and Entertainment Industry

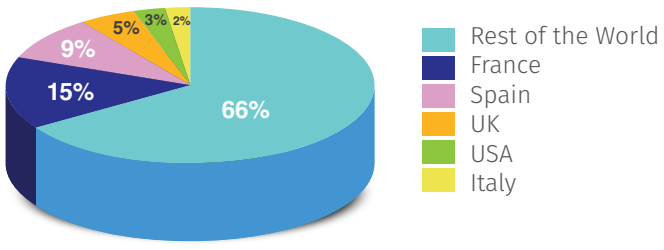
In 2024, Morocco recorded $11.2 billion in tourism revenues. Looking ahead, Morocco plans to attract 26 million tourists by 2030, coinciding with its role as a co-host for the FIFA World Cup. This ambitious target underscores the nation's commitment to enhancing its leisure & entertainment offerings, positioning Morocco as a leading cultural and recreational hub in the region.

Percentage Share of Total Spending (2023)



Sources: World Travel & Tourism Council

Inbound Arrivals (2023)



Sources: Oxford Economics, UN Tourism

18.7 million overnight stays by end of August 2024

13% increase in international overnight stays by end of August 2024

26 million tourists by 2030

150,000 new hotel beds by 2030

Go Siyaha programme to support **1,700** tourism SMEs

Boost leisure & entertainment activities

Hot air balloons flying over the Sahara desert, Morocco

Key Tourism Goals Under NDM 2035

Increase Tourist Arrivals

- Targeting 26 million tourists per year by 2030 (compared to 13 million in 2019).
- Strengthening aviation connectivity to attract more international visitors.

Boost Tourism Contribution to GDP

- Increasing the tourism sector's GDP contribution to 20% by 2030 (up from 7% in 2019).
- Expanding investments in high-value tourism segments such as cultural, wellness and eco-tourism.

Job Creation & Workforce Development

- Generating 200,000+ new jobs in the tourism sector by 2030.
- Enhancing training programmes to improve service quality and workforce skills.

Diversification Beyond Coastal & Heritage Tourism

- Promoting rural, adventure, eco-tourism and sports tourism (e.g., desert experiences, trekking, golf and the 2030 FIFA World Cup).
- Positioning Morocco as a luxury tourism hub, attracting high-spending travellers.

Sustainability & Smart Tourism

- Developing green hotels, sustainable tourism initiatives and digital transformation in the sector.
- Protecting Morocco's UNESCO World heritage sites and natural reserves.

Strengthening Morocco's Global Tourism Brand

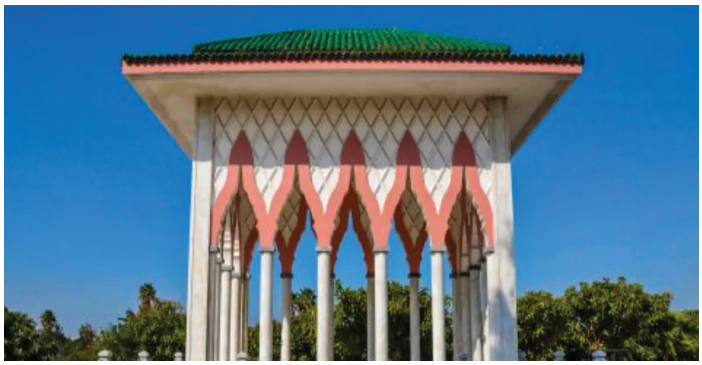
- Expanding marketing campaigns to position Morocco among the top 10 global destinations.
- Enhancing digital tourism platforms and smart tourism experiences.

Panoramic view of Marrakech City, Morocco



Key Leisure & Entertainment Operators (MENALAC Members in bold)

- **Adventureland**
- Amuzeum - Parc de Jeux & Attractions Casablanca
- Aqualand Water Park
- Atlantica Parc
- Bouskoura Waterpark
- CLA Studios
- Coco Park
- Crazy Landia
- Crazy Park
- Dinoland Aqua Park
- Dream World
- Eden Aquapark Marrakech
- Fantasy Park Maroc
- Gravity Park
- Jardin Majorelle
- Kawkab Jeux
- Kidzo, Menara Mall
- La Plage Rouge
- Le Vizir Center Parc & Resort
- Loupi Park Land
- Magic Forest Amusement Park
- Maroc Racing Kart (Karting Agadir)
- Mnar Park VR
- Morocco Local Experience
- Oasiria-Amizmiz Waterpark
- Palooza Park
- Smile Park
- Tamaris Aquaparc
- Xtreme Park
- Yasmine Fun Park



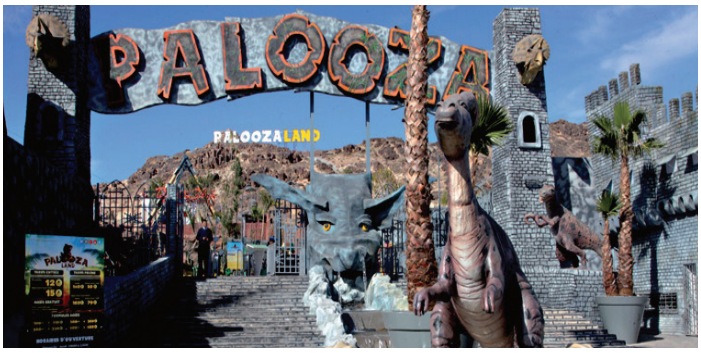
Moroccan Jewish Museum, Casablanca



Chellah Necropolis, Rabat



Majorelle Garden, Marrakech



Palooza Land, Marrakech



Sindibad Park, Casablanca



Coco Park



Mnar Park



Smile Park



Oasiria Water Park, Marrakech



Tamansourt Water Park, Marrakech



Eden Aquapark, Marrakech



Dinoland Aqua Park



Xtreme Park, Agadir



Crazy Park, Casablanca



Adventureland



Dream World



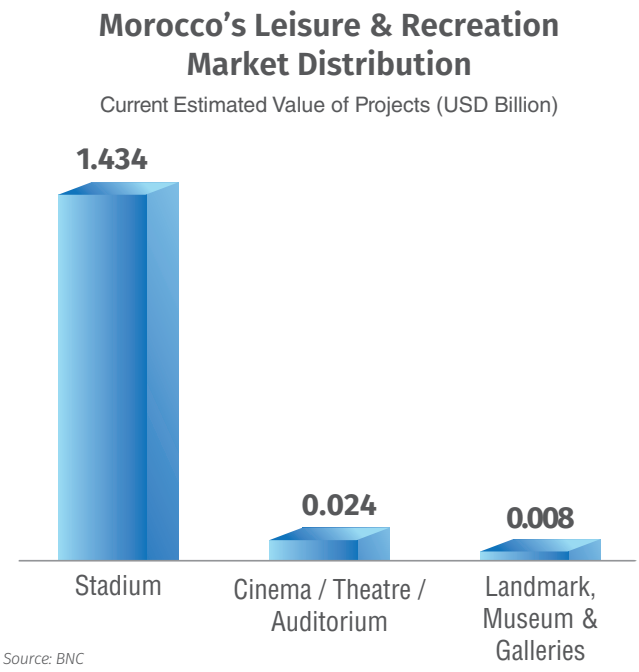
Yasmine Fun Park



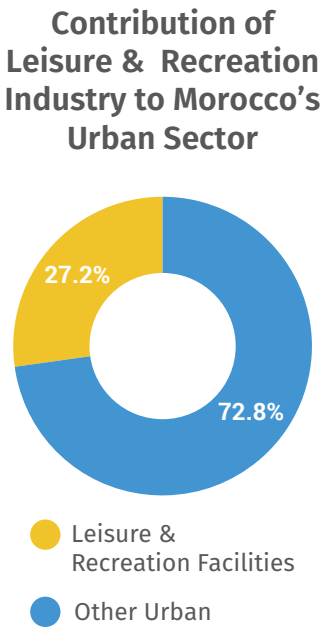
Tamaris Aquaparc, Casablanca

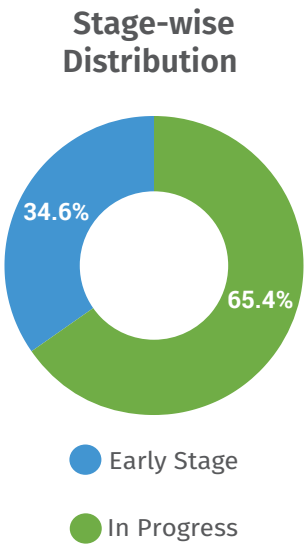
Upcoming Mega Projects at a Glance

According to UN Tourism, Morocco welcomed 17.4 million international tourists in 2024, a 20% increase from the previous year, surpassing its 2026 target ahead of schedule. This upward trend continued into early 2025, with nearly 2.7 million arrivals by February, marking a 24% year-on-year rise. The country's retail industry is also poised for expansion, with forecasts indicating growth between 2025 and 2031.



Source: BNC





Grand Stade Hassan II

Value: USD 500 million
Stage: Under Construction
Developers: Ministry of Youth & Sports, National Society For The Development And Management Of Sports Facilities (Sonarges), National Agency Of Public Facilities (ANEP)
Main Contractor: NA
Description: The project involves the construction of a stadium covering a 100-hectare area near Casablanca in Benslimane. The stadium will feature a FIFA-approved grass pitch, covered stands accommodating 115,000 spectators and various ancillary facilities catering to athletes, officials, organisers and spectators alike. The project will serve as a crucial venue for the co-hosting of the 2030 World Cup.
Completion: Q4 2027



Re-development of Agadir Grand Stadium

Value: USD 166 million
Stage: Under Construction
Developers: Ministry of Youth & Sports
Main Contractor: NA
Description: The Agadir Grand Stadium re-development project will transform it into a modern, football-specific facility with a 46,000-seat capacity. Phase 1 (2023–2025) focuses on interior renovations, expanded training facilities and additional parking ahead of the 2025 Africa Cup of Nations. Phase 2 (2025–2028) includes removing the athletics track, lowering the pitch, reconstructing stands for a football-centric layout and adding a full canopy for complete spectator coverage. The project also enhances premium seating and VIP areas for an improved fan experience.
Completion: Q4 2028



Renovation & Expansion of Grand Stade de Marrakech



Value: USD 166 million
Stage: Under Construction
Developers: Ministry of Youth & Sports
Main Contractor: NA
Description: The Grand Stade de Marrakech renovation will transform it into a modern, football-specific venue with a capacity of 45,860 spectators, potentially higher after expansion. Phase 1 includes removing the athletics track, lowering the pitch by six metres, adding new lower stands and extending the canopy for full seating coverage. Phase 2 focuses on further interior upgrades and football-specific modifications. The renovated stadium will host matches for the 2025 Africa Cup of Nations and the 2030 World Cup.
Completion: Q4 2028

Expansion of Fes Grand Stadium



Value: USD 90 million
Stage: Under Construction
Developers: Ministry of Youth & Sports
Main Contractor: NA
Description: The Fes Grand Stadium re-development will increase its seating capacity to 49,200, with expansion to 55,800 by 2030. Phase 1 focuses on upgrading locker rooms, entrances and facilities for the 2025 Africa Cup of Nations. Phase 2, starting after the tournament, includes removing the athletics track, upgrading the pitch and enhancing parking. The project aligns with Morocco's vision to transform the stadium into a premier sports venue for the 2030 FIFA World Cup.
Completion: Q4 2028



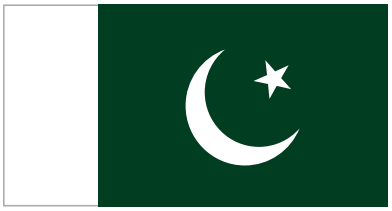
Panoramic aerial view of Casablanca with Grand Mosque Hassan II and the Atlantic Ocean



Grand Theatre of Rabat, Morocco



Night view of Bahria Tower and Dolmen Mall, Karachi



PAKISTAN

Pakistan seeks to diversify its economy beyond agriculture and textiles, with increasing focus on technology, manufacturing and renewable energy. Despite challenges such as political instability and economic fluctuations, its strategic location, evolving economic landscape and structural reforms present opportunities for growth and global partnerships.

Geography

Pakistan, located in South Asia, shares borders with India to the east, Afghanistan and Iran to the west and China to the north, with a southern coastline along the Arabian Sea. It features diverse landscapes, including the Himalayas and Karakoram, the fertile plains of the Indus River and the arid deserts of Balochistan. The country's geography plays a crucial role in its economy, particularly through agriculture, trade and connectivity.

Historically, Pakistan's region was home to ancient civilizations such as the Indus Valley Civilization, one of the world's earliest urban cultures. The area saw successive waves of Persian, Greek and Islamic rule, with the Mughal Empire leaving a lasting cultural impact. In 1947, Pakistan emerged as an independent state following the partition of British India, founded on the vision of creating a separate homeland for Muslims. Over the decades, the country has navigated political shifts, military rule and regional conflicts while striving for economic and democratic stability.

Strategically, Pakistan occupies an important position in global geopolitics. It serves as a crucial link between South Asia, Central Asia and the Middle East, influencing regional trade and security. The China-Pakistan Economic Corridor, part of China's Belt and Road Initiative, enhances Pakistan's role as a trade hub. Additionally, Pakistan's nuclear capability and its position in international affairs make it a key player in regional security.

Population

According to the World Population Review, Pakistan's population stood at 251.3 million in 2024, up from 247.5 million in 2023, and is projected to reach 276.9 million by 2030. The median age in Pakistan is 23.8 years and average life expectancy is 66.4 years.

The country's urban population is growing rapidly, increasing from 32% in 1998 to 40% currently. If the current trend of rural-to-urban migration persists, urban dwellers will make up more than 50% of the population by 2025, indicates Pakistan's Planning Commission, Ministry of Planning, Development & Reform.



Azadi Chowk Roundabout, Lahore



Pakistan at a Glance

Official Name	Islamic Republic of Pakistan
Land Area	770,875 square kilometres (sq km)
Capital	Islamabad
Government	Federal Parliamentary Republic
President	Asif Ali Zardari
Prime Minister	Muhammad Shehbaz Sharif
Population (2024)	251.3 Million
Population Density	326 per sq km
Population Growth	1.71%
Nationality	Pakistani
GDP (2023)	$338 Billion
GDP Per Capita (2023)	$1,365
GDP Growth (2023)	-0.0%
Inflation – Consumer Prices (2023)	30.8%
Industries	Agriculture, Automotive, Chemical, Leather, Mining, Pharmaceutical, Services and Textile
Independence Day	August 14, 1947
Official Languages	Urdu
Dominant Religion	Islam
Currency	Pakistani Rupee
Time Zone	Pakistan Standard Time (GMT+5)
Calling Code	+92

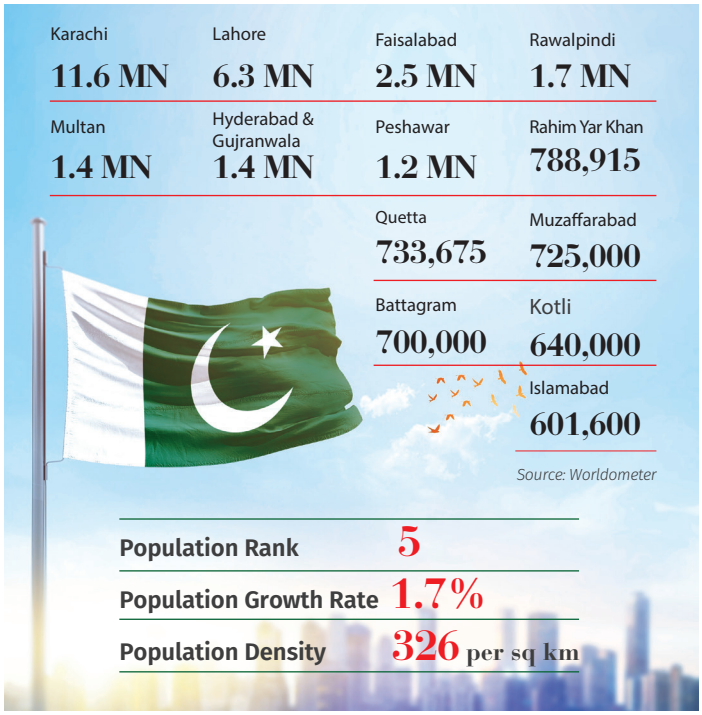
Sources: The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	32,000,000	16,400,000	15,600,000
5 – 9	30,300,000	15,500,000	14,800,000
10 – 14	29,800,000	15,300,000	14,500,000
15 – 19	26,500,000	13,500,000	13,000,000
20 – 24	23,400,000	12,000,000	11,400,000
25 – 29	20,100,000	10,200,000	9,900,000
30 – 34	17,700,000	9,100,000	8,600,000
35 – 39	15,400,000	7,800,000	7,600,000
40 – 44	12,900,000	6,500,000	6,400,000
45 – 49	10,289,600	5,151,800	5,137,800
50 – 54	8,594,100	4,290,900	4,303,200
55 – 59	7,307,900	3,616,900	3,691,000
60 – 64	6,091,800	2,967,300	3,124,500
65 – 69	4,563,100	2,173,300	2,389,800
70 – 74	2,941,200	1,355,500	1,585,700
75 – 79	1,872,400	845,400	1,027,000
80+	1,379,036	602,889	776,147

Source: World Population Review

Population Per City (2024)



Source: World Population Review

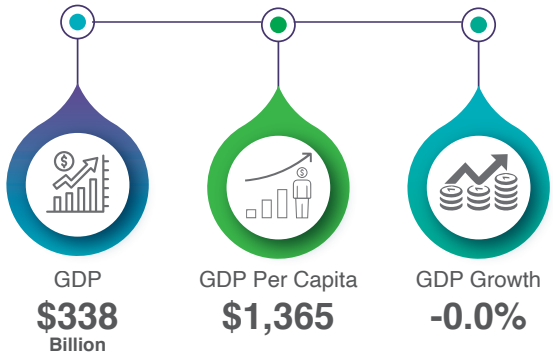
Economy

According to the World Bank, at the start of FY24, Pakistan faced a severe economic crisis, with heightened risks of debt default. Political uncertainty, fiscal and external imbalances and global monetary tightening strained domestic prices and foreign reserves. To manage imports and capital outflows, authorities implemented restrictive measures, which disrupted supply chains, slowed economic activity and worsened inflation. As real labour income declined, high inflation pushed poverty rates higher.

After contracting by 0.2% in FY23, real GDP grew by 2.4% in FY24. Favourable weather conditions led to a 19-year high agricultural growth of 6.3%, increasing real agricultural labour income by 5% and raising the sector's GDP share to 22.7%. As external pressures eased, lifting import and capital controls, the industry and services sectors saw modest growth of 1.5% and 1.1%, respectively.

Despite ongoing risks, the situation has improved. Post-election stability and strong agricultural growth supported economic recovery, with GDP growth expected to reach 2.8% in FY25. Easing supply chain disruptions, lower inflation and improved business confidence driven by credit rating upgrades, reduced political uncertainty and fiscal tightening are expected to support this recovery.

State of Economy Highlights (in 2023)



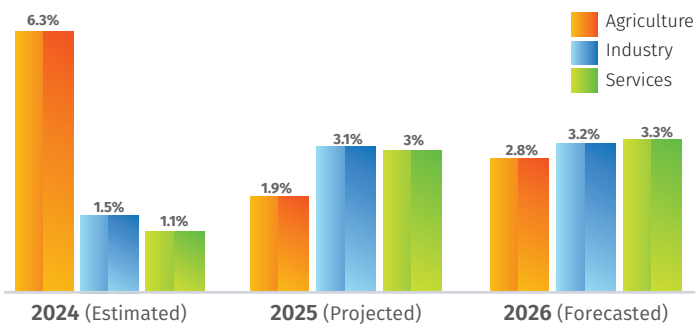
Source: World Bank

Real GDP Growth and CPI Inflation Forecast (2023–2026)

Indicators	*2023 - 24 (Estimated)*	*2024 - 25 (Projected)*	*2025 - 26 (Forecasted)*
Real GDP Growth	2.8%	2.8%	3.2%
CPI Inflation (Average)	23.4%	11.1%	9%
Exports (Growth)	2%	1.3%	3.2%
Imports (Growth)	-4.0%	3.4%	4.6%

Source: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

Pakistan Trade Overview (July-June FY-24 vs. July-June FY-23)

	July-June FY-2024	*July-June FY-2023*	*% Change*
Exports Goods	$30.7 Billion	$27.7 Billion	10.7%
Imports Goods	$54.8 Billion	$55.2 Billion	-0.7%
Exports Services	$7.8 Billion	$7.6 Billion	3%
Imports Services	$10.1 Billion	$8.6 Billion	17%

Source: Pakistan Bureau of Statistics

Key Macroeconomic Highlights

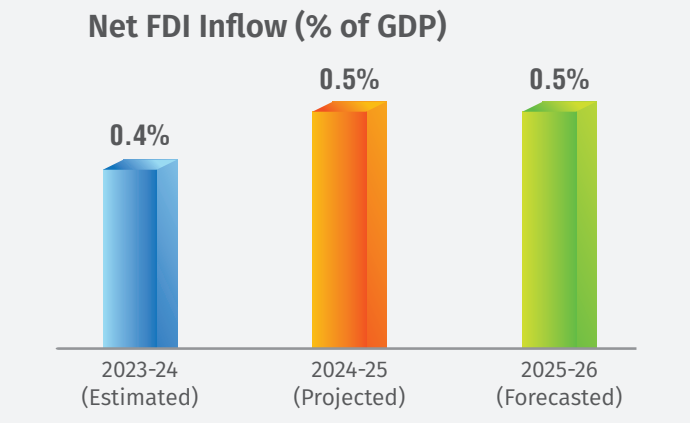


Sources: World Bank

Investment

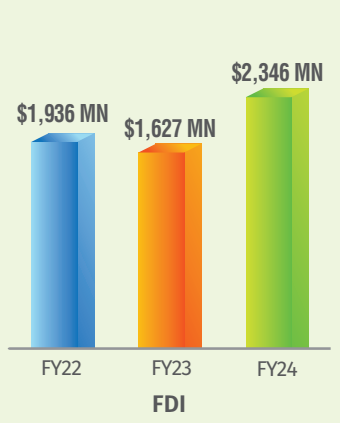
Foreign direct investment (FDI) inflows into Pakistan saw a remarkable 172% year-on-year (YoY) increase, reaching $358.84 million in April 2024, up from $131.9 million in April 2023, indicated the State Bank of Pakistan (SBP). This marked the highest monthly FDI inflow in 51 months. On a month-on-month (MoM) basis, FDI surged by 39%, rising from $258.04 million in March 2024. During the first 10 months of FY24 (July-April), total FDI inflows grew to $1.46 billion, compared to $1.35 billion during the same period in FY23. The power sector attracted the highest FDI inflows in April 2024, totalling $194 million.

Having said that, according to the World Bank, a complex and inconsistent regulatory framework has hindered both domestic and foreign investment in Pakistan. The country has attracted relatively low FDI net inflows compared to its peers, largely due to a challenging business environment characterised by complex and unpredictable regulatory enforcement. These obstacles impose significant costs on businesses, forcing them to allocate resources towards compliance rather than productive activities, ultimately discouraging investment, including FDI.



Source: World Bank





Source: State Bank of Pakistan

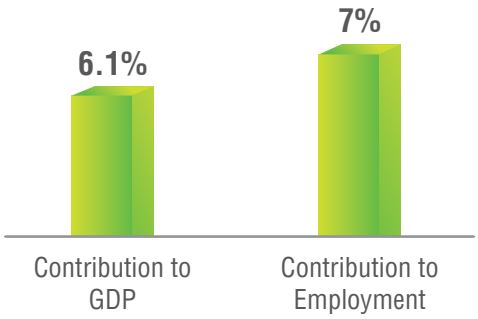
Pakistan Tourism Sector

According to the World Travel & Tourism Council's (WTTC) 2024 Economic Impact Research, Pakistan's tourism sector is estimated to account for 6.7% of employment through 4.79 million jobs in 2024, which is projected to increase to 7% generating 6.49 million jobs by 2034. While international visitor spending stood at $1.7 billion in 2024, it is projected to rise to $2 billion by 2034. Domestic visitor spending was significantly more at $14.6 billion in 2024 and is expected to touch $24.4 billion by 2034.

However, challenges exist such as lack of tourist services infrastructure, including availability of hotel rooms. A big reason why provinces are allocating funds to rectify the situation. Notably, high-quality accommodations are being developed to attract tourists. For example, Radisson Hotel Group is growing its presence in Islamabad with two upcoming properties scheduled to open in the next three years – Radisson Blu Hotel & Residences near Islamabad Airport, featuring 432 rooms; and Radisson Hotel Islamabad Multi Gardens, offering 165 rooms. Additionally, the newly launched Signature Rotana Hotel in Islamabad provides 522 accommodations, comprising 378 hotel rooms and 144 branded residential apartments.

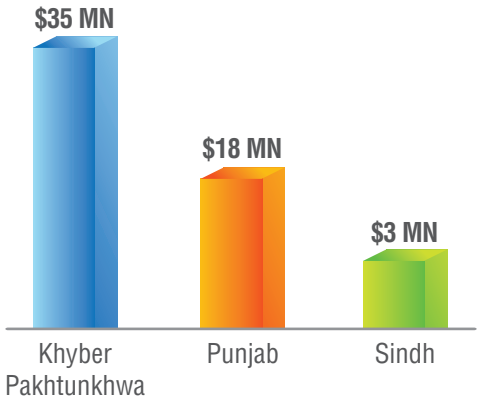
Pakistan also lacks dedicated entertainment hubs. Developing entertainment cities with amusement parks, sports facilities, shopping & dining could boost the economy, create jobs and attract tourists, thereby strengthening the tourism sector.

Tourism Index (2024)



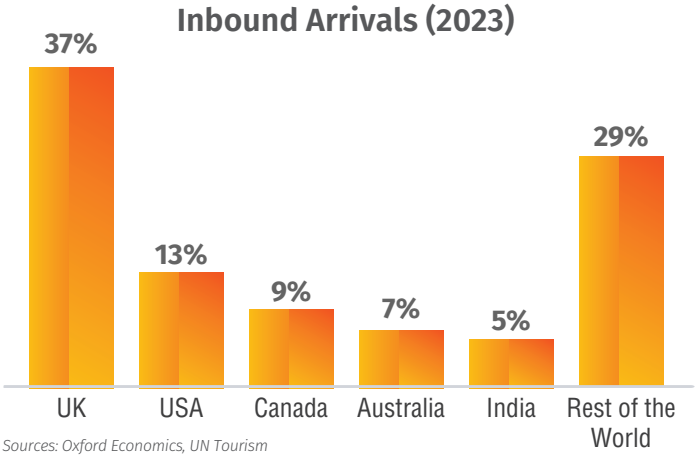
Source: World Travel and Tourism Council

Government Investment in Travel & Tourism



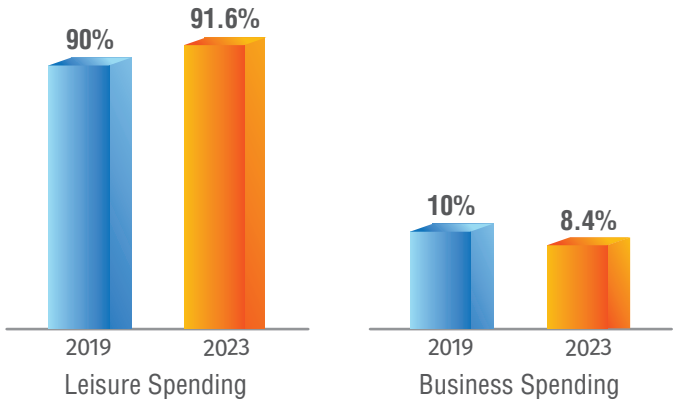
Sources: Associated Press Pakistan & Finance Department, Government of Sindh

Inbound Arrivals (2023)



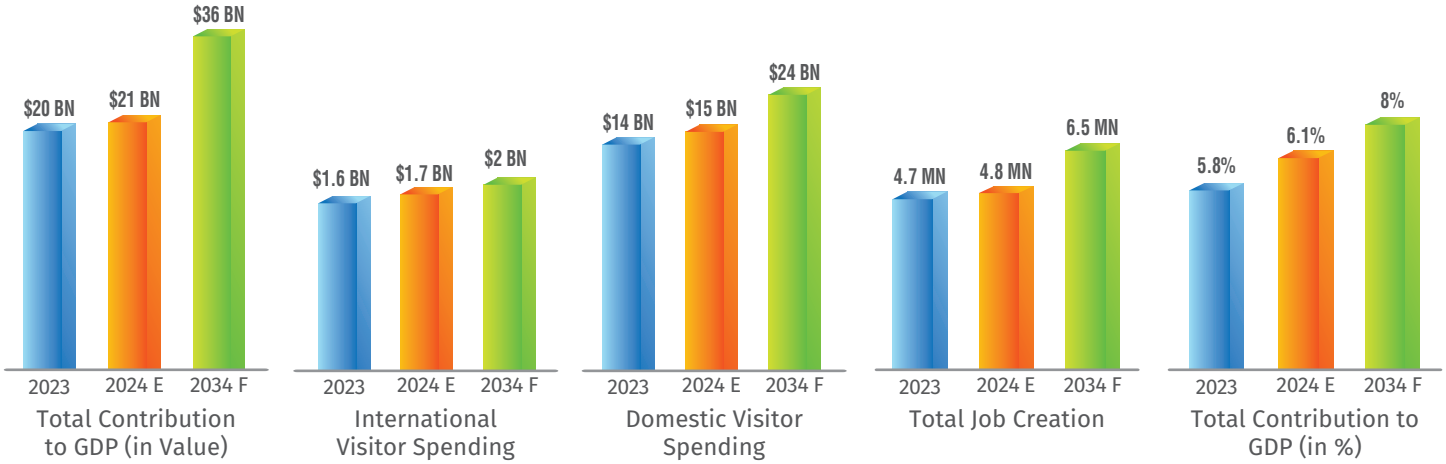
Sources: Oxford Economics, UN Tourism

Growth in Leisure Spending



Sources: World Travel & Tourism Council

Projected Growth in Tourism Spending and Economic Contribution (2023–2034)



Source: World Travel & Tourism Council

E: Estimated
F: Forecasted

Pakistan Leisure & Entertainment Industry

The leisure & entertainment sector in Pakistan is witnessing considerable growth, with urban centres such as Karachi, Lahore and Islamabad at the forefront of this expansion. These cities offer a variety of attractions that cater to diverse age groups and preferences.

In Karachi, facilities such as Super Space provide indoor amusement experiences, while family entertainment destination Fun City is expanding presence beyond Islamabad. Theme parks including Bahria Adventure Land in Karachi and Joyland in Lahore offer a range of thrilling rides and attractions. Water parks like Sozo Water Park in Lahore and The Great Fiesta Family Water Park in Karachi provide refreshing recreational options, especially during the summer months.

The growth of these entertainment venues not only enhances domestic tourism but also contributes to the economy by creating employment opportunities and stimulating related industries.

Key Leisure & Entertainment Operators

- Aladdin's Fun House
- Ayub National Park
- Bahria Adventure Land
- Chaman Zar e Askari Park Multan
- Chunky Monkey Amusement Park
- Dino Valley by A-Cube
- Dolphin Bay at Aquaventure World
- Fun Cage
- Fun City, Giga Mall
- Fun City, The Centaurus Mall
- Fun Dunya Amusement Park Gujranwala
- Fun Factory
- Funation
- Green City Water Park
- Hill Park
- Jinnah Park
- Joyland
- KhyberPunk Arcade by Sadaan
- Lake View Park
- Megazone Entertainment Hub
- Onederland
- PanIQ Room Islamabad
- PlayDium - Play Area & Entertainment Center
- Pleasure Land Family Fun Park
- Rainbow Kids Centre
- Sindbad's Wonderland Amusement Park
- Sindbad Xtreme, Dolmen Mall Clifton
- Sozo Water Park
- Sunway Lagoon
- Super Space
- The Great Fiesta Family Water Park
- WePlay
- Wonder World Pakistan
- Yoyo Land Pakistan



PlayDium - Play Area & Entertainment Center



Sindbad's Wonderland Amusement Park



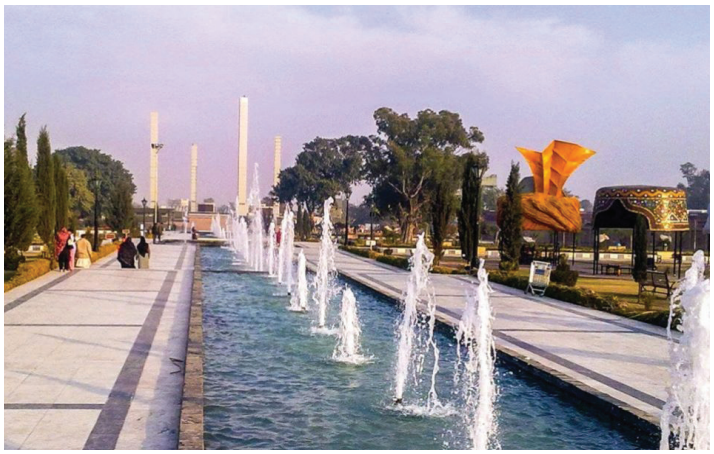
Taxila, Punjab



Hingol National Park, Balochistan



WePlay



Jinnah Park, Rawalpindi



Fun City, Centaurus Mall



Joyland, Rawalpindi



Jungle World, Rawalpindi



Karachi Safari Park



Bahria Adventure Land



Chunky Monkey Amusement Park



KhyberPunk Arcade by Sadaan



Onederland



Sozo Water Park



Super Space



The Great Fiesta Family Water Park



Wonder World Pakistan



Dino Valley by A-Cube



Funation, Gold Crest Mall, Lahore



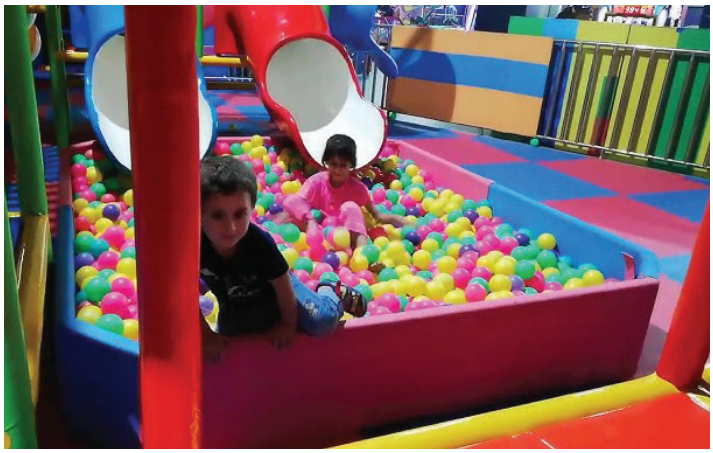
Sindbad Xtreme, Dolmen Mall Clifton



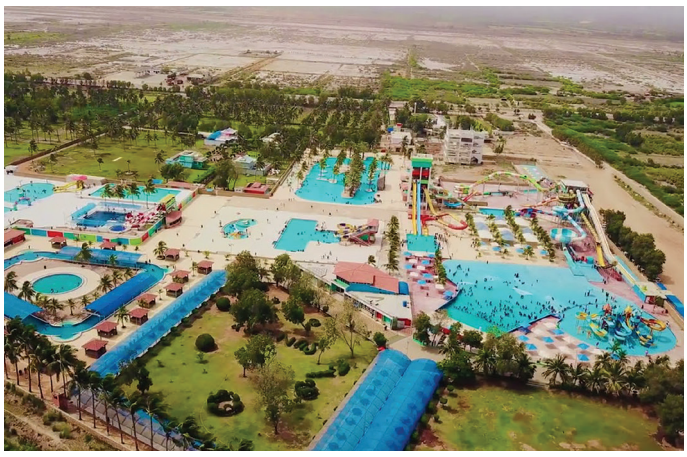
Funcity, Giga Mall



Aladdin's Fun House



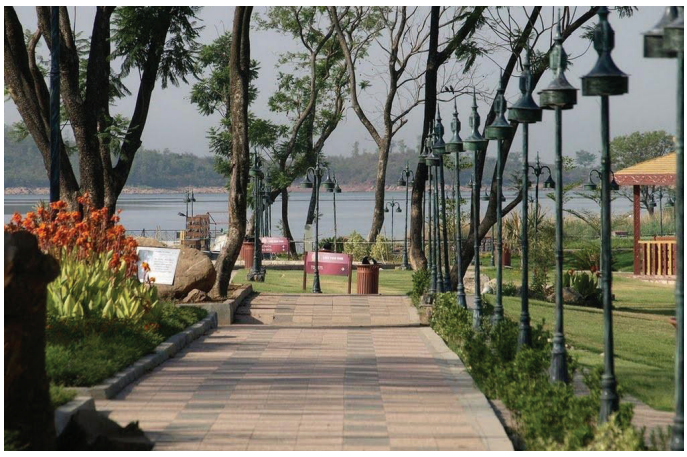
Yoyo Land Pakistan



Sunway Lagoon



Rainbow Kids Centre



Lake View Park



Fun Factory

Upcoming Mega Projects at a Glance

Pakistan's leisure & entertainment sector is expected to see growth, driven by strategic investments to boost tourism.

For example, the Karachi Coast City project, expected to be complete by the end of this year, promises to transform the city's coastline into a vibrant urban area, featuring luxury apartments, shopping malls, parks and entertainment facilities.

Lahore is witnessing a surge in entertainment infrastructure, with the Punjab government announcing plans to develop two new amusement parks. Meanwhile, in Islamabad, the Blue World Water Theme Park, spanning 70,000-square-metre (sqm), will feature 20 different water rides.

These developments are part of the broader strategy to position Pakistan as a tourist destination.

Zameen NEO - Gulberg 3

Value: USD 604 million
Stage: Under Construction
Developers: Dubizzle Group, Zameen Developments (Pvt) Ltd.
Main Contractor: NA
Description: The project involves the construction of Zameen Neo located in Gulberg 3, Lahore with a ground-plus-six-floor building. The amenities will include a swimming pool, spa and sauna, residents' lounge, roof garden & deck, 24/7 security and surveillance, designated parking, gymnasium and a mini theatre along with four commercial shops.
Completion: Q4 2026



Punjab Government Tourism Infrastructure Boost

Value: NA
Stage: Ongiong
Developer: Government of Punjab
Description: Includes 16 new tourism and recreation projects such as Bansara Gali resort, heritage parks and eco-tourism villages across Punjab. The initiative will transform 170 historical sites into world-class tourist attractions, including 101 Gurdwaras and 53 churches, preserving the province's rich heritage. To oversee these developments, the Punjab Tourism Authority will be established, bringing all history, heritage and tourism-related institutions under one platform.
Completion: NA



Adventure City Park – Islamabad

Value: USD 1 million
Stage: Ongoing
Developer: Capital Development Authority (CDA)
Description: Islamabad's first dedicated adventure park featuring zip lines, climbing walls, obstacle courses, as well as walkways, cycling tracks, eco-friendly landscaping and comprehensive recreational infrastructure, blending environmental sustainability with modern leisure amenities. Site Planning underway. Construction not yet started.
Completion: NA



Lahore Entertainment City (Muridke)

Value: NA
Stage: Under construction
Developer: Al-Jalil Developers
Description: Lahore Entertainment City in Muridke is Pakistan's first purpose-built entertainment city, located on Main GT Road near Kala Shah Kaku Interchange. Developed by Al-Jalil Developers, the project combines residential living with large-scale leisure and retail offerings. The masterplan includes an 80-acre theme park, cinema complex, 5-star hotel, international school, and sports and wellness zones. With LDA approval secured and development activities underway, the city is poised to become a major lifestyle hub for Lahore and surrounding regions. Featuring modern infrastructure and flexible residential plot options, it promises strong returns and long-term value.
Completion: Not yet announced



Karachi Coast City Project



Value: USD 3.5 billion
Stage: Under Construction
Developers: Karachi Coastal Comprehensive Development Zone (KCCDZ), Ministry of Maritime Affairs
Description: Spread over 640 hectares, the modern fishery port includes a harbour bridge connecting Manora Islands and Sandspit Beach, a fisheries export processing zone, and a water treatment plant. With 20,000 affordable housing units across more than 640 hectares (1,581 acres) of the western backwaters marshland of the Karachi Port Trust (KPT), the project aims to transform Karachi into a modern port city. It also promises to revitalise the city's coastline into a vibrant urban area, featuring luxury apartments, shopping centres, parks and entertainment facilities.
Completion: Q4 2025

Punjab Government Projects



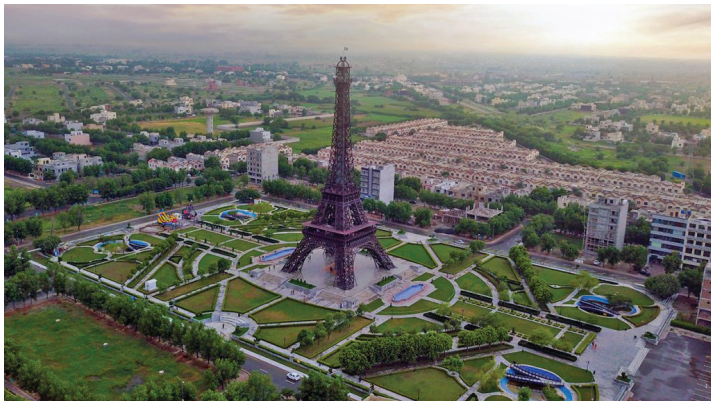
Value: USD 621 million
Stage: Under Construction
Developer: The Punjab government
Description: The Punjab government is reportedly supporting proposals for a Disney-style theme park in Lahore. The park will span 600 acres and will be developed under a build, own and operate (BOO) model. The government will initially provide the land for a period of 20 years. This multimillion-dollar project is expected to feature amusement attractions, hotels, and business centres, creating new employment opportunities for thousands of residents. Among the attractions will be an aquarium, as well as state-of-the-art theme park rides, including a rollercoaster.
Completion: NA

Blue World City



Value: USD 3.5 billion
Stage: Under Construction
Developer: Blue Group of Companies
Description: The Blue World City in Islamabad is being designed as a premier housing community spanning 5,000 Kanal, divided into distinct blocks and plots to offer a diverse range of living options.Furthermore, Blue World City is poised to become a captivating destination for both local and international tourists, offering an array of renowned landmarks and attractions. Visitors will be enthralled by iconic wonders such as the Burj Al Arab-inspired Blue Mosque; a majestic Horse Mascot that stands as the world's tallest; a vibrant Rumi's Square; and a world-class Water Theme Park. These remarkable features will be nestled within a secure and gated community, ensuring a safe and enjoyable experience for all. Adding to the allure, a hilltop 7-star hotel will provide luxurious accommodation for guests. With the incorporation of the Blue World Economic Zone into the project, the city will also emerge as an ideal hub for local and international businesses.
Completion: Q4 2030

Theme Park 2025, Bahria Town Lahore



Value: NA
Stage: Ongoing
Developer: Landmark Developers
Description: Theme Park 2025 in Bahria Town Lahore is rapidly taking shape. Thrilling rides, landscaped areas and key infrastructure such as the main entrance and parking are under development. Attractions will include a go-kart track, dolphin show and family zones. Located just opposite, the Grand X Mall, also by Landmark Developers is nearing completion. With 4,000–5,000 daily visitors expected, and a triple-loop rollercoaster planned for 2026, the park is set to boost local property values and offer strong investment potential.
Completion: Estimated late 2025

KITE (Khyber Pakhtunkhwa Integrated Tourism Development)

Value: USD 77 million
Stage: Ongoing
Developers: Government of Khyber Pakhtunkhwa
Description: The Khyber Pakhtunkhwa Integrated Tourism Development Project (KITE) is a World Bank–funded initiative aimed at boosting sustainable tourism across key destinations in Khyber Pakhtunkhwa, Pakistan. The project focuses on the development of Integrated Tourism Zones (ITZs) in areas such as Swat, Chitral, Naran, Galiyat, and Kumrat, with an emphasis on improving infrastructure, accessibility, heritage preservation, and community engagement. It includes the construction of roads, tourist facilitation centers, rescue services, environmental management systems, and support for local businesses through training and capacity building. The initiative aims to position KP as a prime tourism destination while promoting inclusive economic growth and cultural preservation.
Completion: June 2026



Pullman Karachi Brentwood Tower

Value: NA
Stage: Under Construction
Developer: Al Feroz Group (Brentwood Hospitality) in collaboration with Accor and Valor Hospitality Partners
Description: Pullman Karachi Brentwood Tower is a premier mixed-use hospitality landmark under development in Clifton, Karachi. Part of a broader coastal masterplan alongside Dolmen Mall, the tower will offer 220 upscale hotel rooms and 28 serviced apartments, enhanced by two signature restaurants, a lounge, a full-service spa, outdoor pool, fitness center, and seven versatile banqueting venues spanning over 2,100m² catering to both corporate travellers and leisure guests. This project marks the first-ever Pullman-branded property in Pakistan, showcasing international luxury standards through a collaboration between Accor, Valor Hospitality, and local developer AlFeroz.
Completion: 2028





Faisal Masjid, Islamabad



Aerial view of Khartoum, Sudan



REPUBLIC OF SUDAN

Sudan's economy faces a sharp downturn due to the ongoing conflict in the country that has damaged infrastructure, displaced millions and caused food insecurity. The International Monetary Fund (IMF) projected an 18.3% GDP contraction in 2024, following a 12% decline in 2023. To attract investments and stimulate recovery, Sudan must adopt comprehensive reforms, enhance legal and regulatory frameworks and stabilise its political environment.

Geography

Spanning approximately 1.73 million square kilometres (sq km) of land area, Sudan is the third-largest country in Africa. It shares borders with Egypt to the north, Libya to the northwest, Chad to the west, the Central African Republic to the southwest, South Sudan to the south, Ethiopia to the southeast and Eritrea to the east. Sudan has a long coastline along the Red Sea, which provides strategic access to international maritime trade routes. The country's terrain is diverse, featuring vast deserts in the north, the fertile Nile Valley and the savannahs in the south. The Nile River, with its two major tributaries – the White Nile and the Blue Nile – flows through Sudan, making it a key source of agriculture and livelihood for millions.

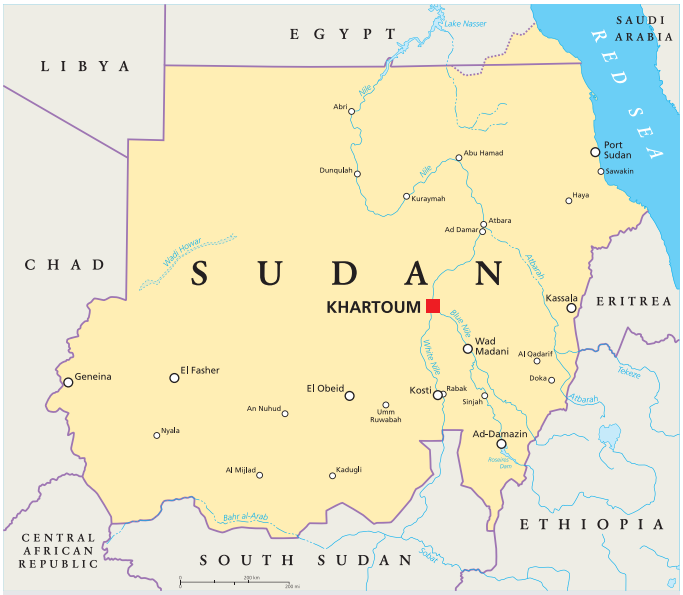
Historically, Sudan has been a crossroads of civilizations, influenced by ancient Egyptian, Nubian and later Islamic cultures. The Kingdom of Kush, which ruled over parts of Sudan for centuries, left behind remarkable historical sites, including the Pyramids of Meroë. The region later became part of various Islamic empires before falling under Anglo-Egyptian rule in the 19th century. Sudan gained independence in 1956, but its post-independence history has been marked by prolonged civil wars, ethnic conflicts and political instability. The country split in 2011, leading to the formation of South Sudan.

The secession of South Sudan in 2011 had a profound impact on the country's economy, as it lost 75% of its oil reserves located in the south. This led to a sharp decline in government revenue, foreign exchange earnings and GDP growth. The loss of oil exports triggered currency devaluation, high inflation and rising debt levels. Sudan also faced social and political instability, hindering economic reforms. Ongoing conflicts and regional instability continue to pose significant challenges.

Yet, Sudan holds significant strategic importance due to its location. It serves as a gateway between North and Sub-Saharan Africa, connecting key trade and migration routes. Its vast natural resources, including gold, oil and fertile agricultural land, make it an essential player in regional economic dynamics. Additionally, Sudan's control over key sections of the Nile River impacts water security for neighbouring countries including Egypt and Ethiopia. With political stability and economic reforms, Sudan has the potential to become a crucial hub for trade, investment and regional integration in Africa.

Population

Sudan has a predominantly young population, with 41% of its people under the age of 15. Additionally, 20% fall within the 15-24 age group, while 31% are between 25 and 54 years old. Those aged 55 to 64 make up just under 4% of the population, and only 3.3% are over 65. The country has a notably low median age of 18.9 years.



Sudan at a Glance

Official Name	Republic of Sudan
Land Area	1.7 Million sq km
Capital	Khartoum
Government	Presidential republic
President of South Sudan	Salva kiir
Population (2025)	51.7 Million
Population Density	26 per sq km
Population Growth	2.1%
Nationality Split	Arab and Arab-Berber descent
GDP (2023)	$109.3 Billion
GDP Per Capita (2023)	$2,183
GDP Growth (2023)	-20.1%
Inflation (2023)	77.2%
Industries	Agriculture, manufacturing, mining
Independence Day	January 1, 1956
Official Languages	Arabic
Dominant Religion	Islam
Currency	Sudanese Pound
Time Zone	Central Africa Time (GMT+2)
Calling Code	+249

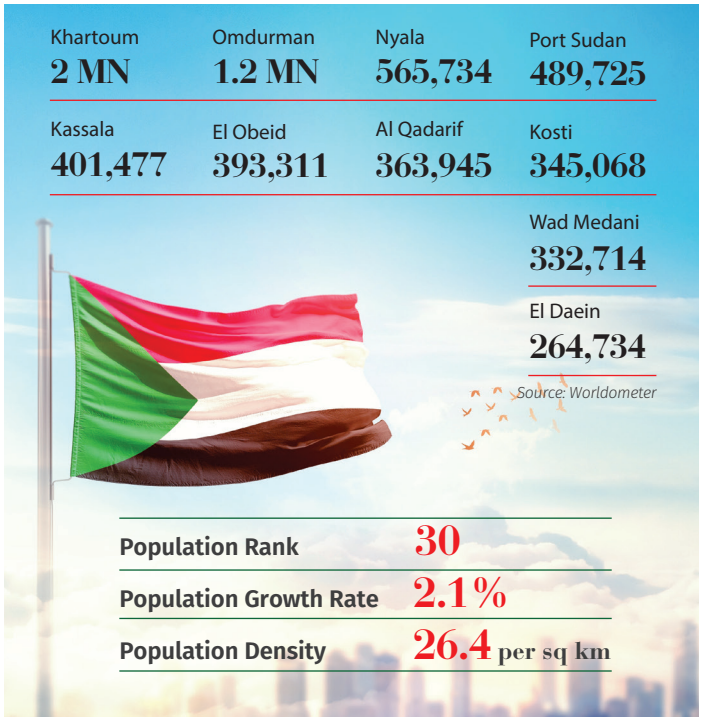
Sources: African Development Bank Group, The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	7,639,107	3,880,180	3,758,927
5 – 9	6,768,764	3,428,274	3,340,490
10 – 14	6,009,504	3,036,433	2,973,071
15 – 19	5,437,544	2,742,199	2,695,345
20 – 24	4,804,246	2,411,896	2,392,350
25 – 29	4,161,208	2,078,354	2,082,854
30 – 34	3,437,045	1,684,499	1,752,546
35 – 39	2,735,730	1,306,252	1,429,478
40 – 44	2,235,694	1,037,648	1,198,046
45 – 49	1,769,693	795,963	973,730
50 – 54	1,526,889	695,855	831,034
55 – 59	1,253,827	581,956	671,871
60 – 64	1,004,023	477,318	526,705
65 – 69	758,406	377,451	380,955
70 – 74	476,375	251,872	224,503
75 – 79	253,038	138,781	114,257
80+	177,856	87,811	90,045

Source: World Population Review

Population Per City (2024)



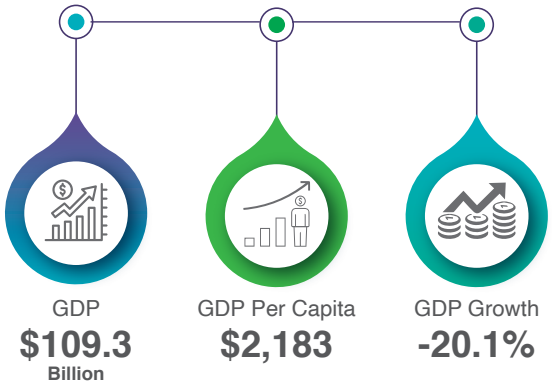
Sources: World Bank & World Population Review

Economy

According to the World Bank, the ongoing conflict between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF), which erupted in April 2023, has escalated despite efforts at peace negotiations. The death toll continues to climb, and food insecurity has reached critical levels, impacting more than half of Sudan's population (25.6 million), with 2% (755,000 people) facing catastrophic famine conditions.

Recent floods in the eastern region have worsened the humanitarian crisis, triggering a severe cholera outbreak, as confirmed by the country's Minister of Health. The crisis has been compounded by famine, widespread destruction of infrastructure, trade disruptions and the displacement of 12 million people due to the conflict. Sudan's economy is projected to shrink to two-thirds of its pre-war size after consecutive years of double-digit contractions, leading to a surge in poverty. The loss of productive capacity and human capital is expected to hinder long-term recovery, further entrenching economic hardships. The conflict has devastated key sectors such as industry, agriculture and oil, while halting education and demolishing healthcare facilities. Approximately 10 million people remain internally displaced, and over 2 million have sought refuge in the neighbouring countries.

State of Economy Highlights (in 2023)



Source: World Bank

The collapse of government institutions has exacerbated economic turmoil, disrupting public spending and eroding the tax base, leading to a sharp decline in revenue. Even before the conflict, Sudan's economy was struggling due to multiple shocks intensified by political instability. Poor investment in infrastructure and human capital during the oil boom years (2000-2010) and stalled structural reforms amplified the socio-economic fallout of South Sudan's 2011 secession. Sudan lost 75% of its revenues – primarily from crude oil exports – worsening macroeconomic vulnerabilities. Between 2011 and 2018, GDP growth averaged -1.3%, and from 2018 to 2022, economic activity continued to deteriorate due to political instability, hyperinflation and fiscal mismanagement. Efforts to stabilise the economy were undermined by the COVID-19 pandemic and the 2021 military coup, which halted debt relief and foreign aid inflows. As a result, per capita growth has been negative for over a decade.

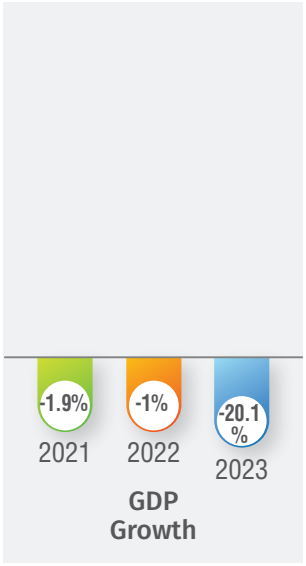
The economic outlook remains highly uncertain. GDP is expected to contract by 15.1% in 2024, following a 20.1% decline in 2023, mainly due to reduced private consumption and investment. If conflict subsides in the coming months, a modest recovery of 1.3% could occur in 2025, with further growth of 2.9% in 2026. However, real GDP would remain well below pre-conflict levels. Despite some improvements, inflation is projected to remain in double digits due to currency depreciation and widespread supply chain destruction. Medium-term fiscal challenges will persist, with expenditures rising to 9.8% of GDP and revenues expected to reach 6.2% of GDP by 2026.

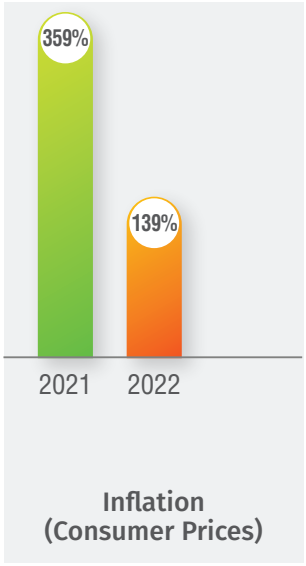
Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	-15.1%	1.3%	2.9%
CPI Inflation (Average)	180.2%	89.4%	33.1%
Exports (Growth)	36.4%	18.8%	5%
Imports (Growth)	-25.7%	-10.8%	8%

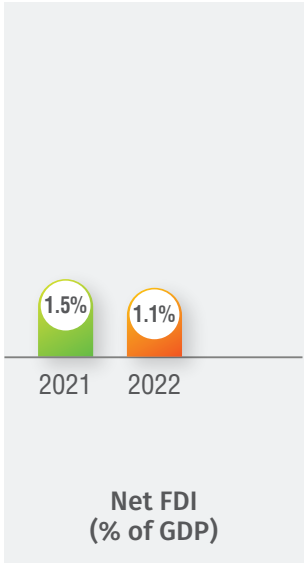
Source: World Bank

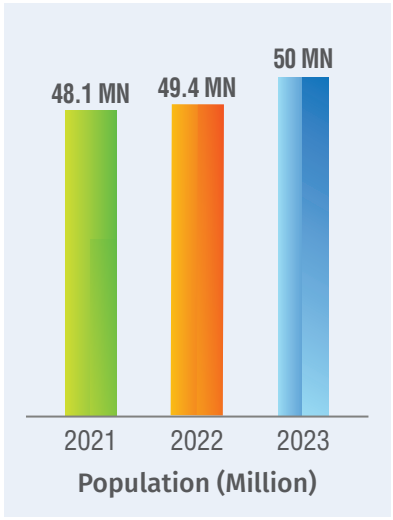
Key Macroeconomic Highlights



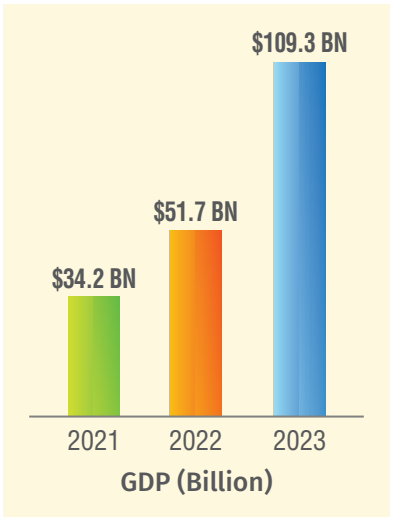






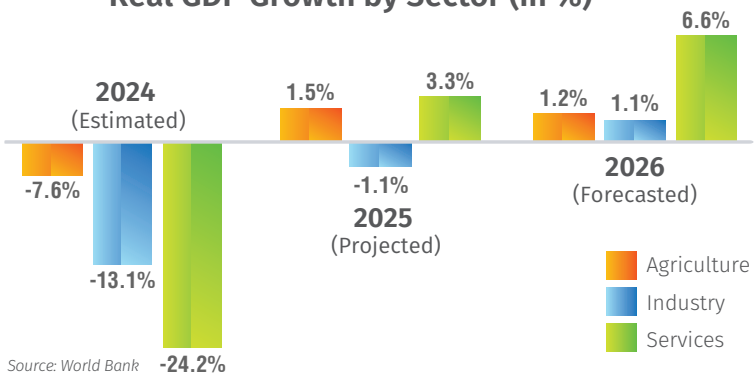






Sources: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

FDI Inflow Overview

FDI Inflow (2023)	$548 Million
FDI Inward Stock (2023)	$30.9 Billion

Sources: African Export-Import Bank & UNCTAD

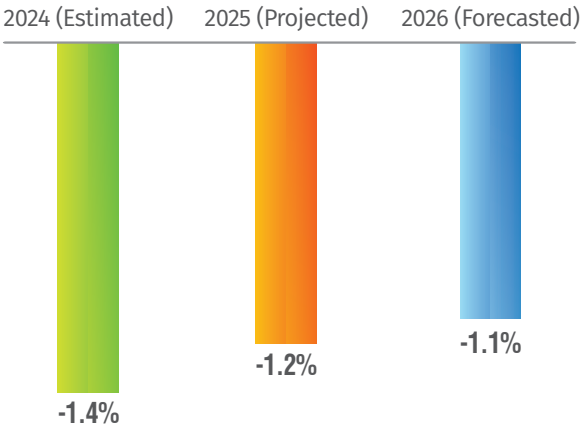


The White and Blue Niles merge at Khartoum, Sudan

Investment

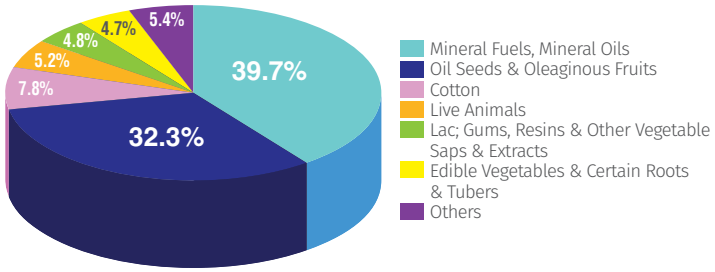
According to the African Development Bank, Sudan has historically attracted significant foreign direct investments (FDI), primarily in the oil sector. In 2017, FDI inflows reached approximately $1.07 billion. However, recent years have seen a decline in FDI. In 2021, FDI amounted to $520 million, a 27.07% decrease from 2020. This downward trend continued in 2022, with FDI inflows reaching $570 million. The reduction in FDI is attributed to several factors, including the secession of South Sudan in 2011, which led to a loss of oil revenue and ongoing political instability affecting the investment climate.

Net FDI Inflow (% of GDP)

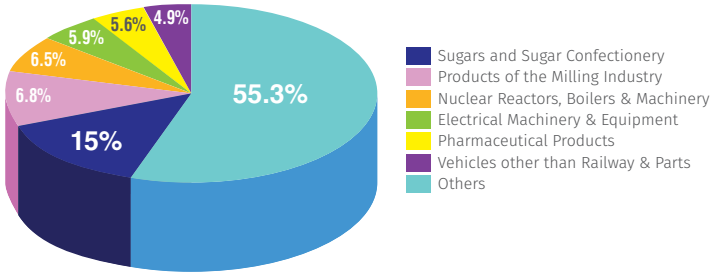


Source: World Bank

Exports by Product Type (2023)



Imports by Product Type (2023)



Source: ITC, Afreximbank Research

Sudan's Gold Exports Generated **$1.5 Billion** in Revenue in the First **10 months** of **2024.**

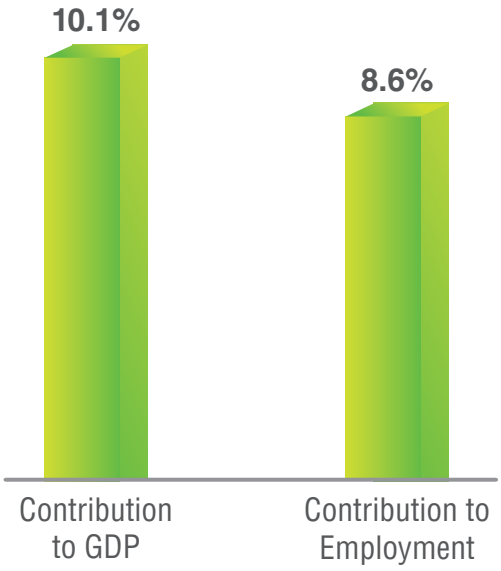


Ruins of the ancient city Kerma, Sudan

Sudan Tourism Sector

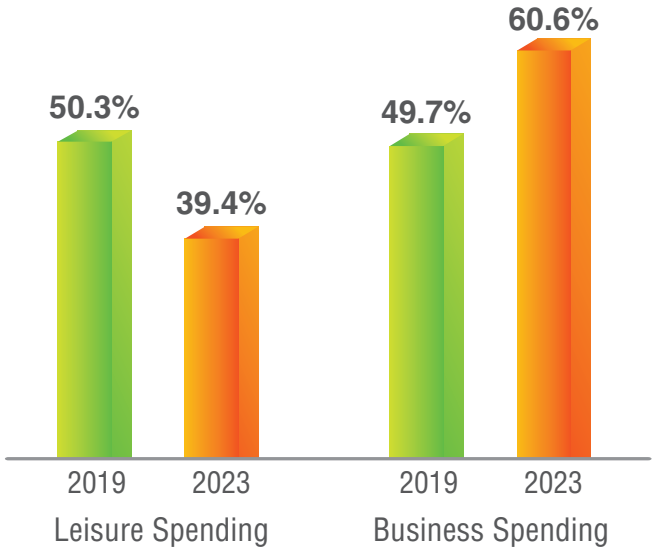
According to research firm GlobalData, increasing visitor numbers and boosting revenue from tourism are key priorities for Sudan's government. In 2023, international arrivals were projected to grow by 37%. The country does not heavily depend on a single source market; however, intraregional travel is a notable trend. Five of its top 10 source markets are within Africa. However, these markets vary significantly in size. Identifying their relative importance and recognising high-potential markets beyond this list will be essential in unlocking Sudan's tourism growth potential.

Tourism Index (2024)



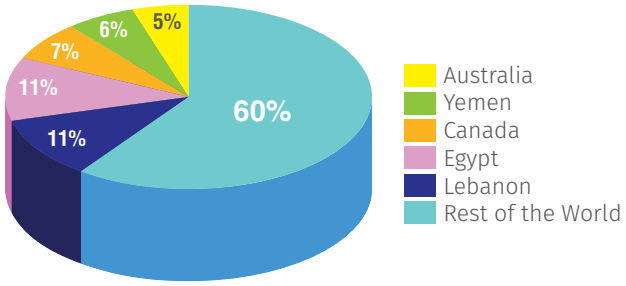
Source: World Travel and Tourism Council

Leisure Spending Snapshot

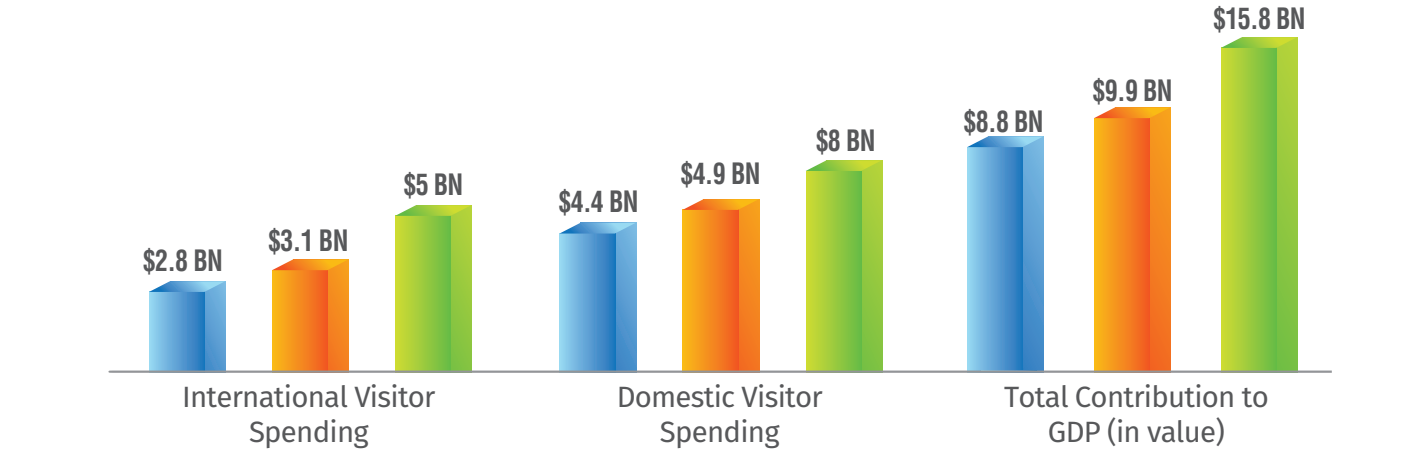


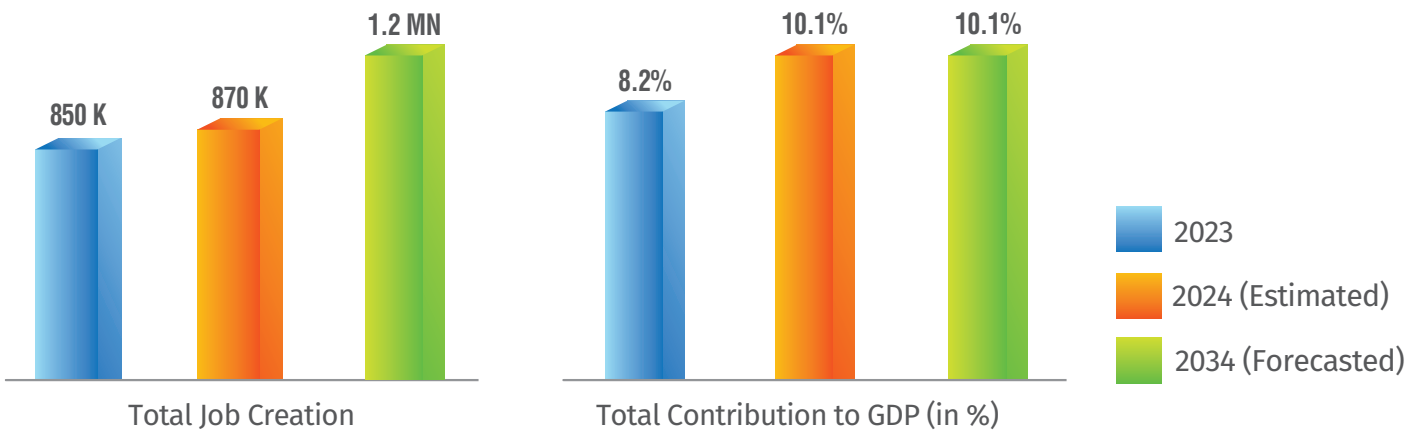
Sources: World Travel & Tourism Council

Inbound Arrivals (2023)



Sources: Oxford Economics, UN Tourism





Source: World Travel & Tourism Council

Sudan Leisure & Entertainment Industry

Sudan's rich cultural heritage, archaeological sites and natural landscapes offer untapped growth opportunities. Developing tourism infrastructure and promoting the country's unique attractions could stimulate economic growth and create employment. However, achieving this requires concerted efforts to restore peace, rebuild infrastructure and foster international partnerships.

Currently, Sudan's leisure and entertainment industry is in its nascent stages. In urban centres like Khartoum, several family entertainment centres (FECs) and amusement parks have emerged, offering recreational options for residents and visitors. However, success of these establishments hinges on political stability, targeted reforms and strategic investments into the sector.

Key Leisure & Entertainment Operators

- Al Mogran Family Park
- Rainbow Kids Center



Al Mogran CBD, Khartoum



Jebel Barkal and the Napatan Region



Kerma (Deffufa Temples)



Meroë Pyramids



Rainbow Kids Center



Al Mogran Family Park



Aerial view of Juba with river Nile



Meroe Pyramids, Sudan



National monument of the Kasbah, Tunisia



REPUBLIC OF TUNISIA

With its historical legacy, strategic location and ongoing economic reforms, Tunisia remains a significant player in North Africa and the Mediterranean region.

Geography

Tunisia, the northernmost country in Africa, spans 163,610 square kilometres (sq km) and is bordered by Algeria to the west, Libya to the southeast and the Mediterranean Sea to the north and east. Its geography is diverse, consisting of fertile coastal plains, the Tell and Atlas Mountains in the northwest and the Sahara Desert in the south. Tunisia's Mediterranean coastline extends over 1,300 kilometres, making it a hub for maritime trade and tourism.

The country's history spans millennia, shaped by various civilisations. Originally inhabited by Berber tribes, it became a Phoenician stronghold in the 9th century BCE, with Carthage emerging as a powerful empire. After its defeat by Rome in 146 BCE, Tunisia flourished under the Roman rule, becoming a key agricultural and commercial hub. Following the decline of Rome, it was briefly ruled by the Vandals before joining the Byzantine Empire in the 6th century.

The Arab-Muslim conquest (7th century) introduced Islam and Arabic culture, leading to rule by dynasties such as the Aghlabids, Fatimids and Hafsids. It later became part of the Ottoman Empire (16th century) and was colonised by France in 1881. Gaining independence in 1956, Tunisia modernised under Habib Bourguiba. In 2011, it sparked the Arab Spring, ousting President Ben Ali and beginning a democratic transition that continues today.

Tunisia's strategic location on the Mediterranean has made it a historically significant player in trade, military campaigns and regional politics as a gateway between Africa, Europe and the Middle East. Additionally, it is one of the most politically stable countries in the region, making it a key partner for European and African economic and security initiatives. The country's diverse economy, which includes agriculture, tourism, manufacturing and energy production, further reinforces its importance as a regional power.

Population

According to the World Population Review, Tunisia's population stood at 12.3 million in 2024, up from 12.2 million in 2023, and is projected to reach 12.6 million by 2030. The median age in Tunisia is 32.2 years and average life expectancy is 76.7 years.



Monastir, Tunisia



Tunisia at a Glance

Official Name	Republic of Tunisia
Land Area	163,610 sq km
Capital	Tunis
Government	Parliamentary republic
President	Kais Saied
Population (2024)	12.3 Million
Population Density	79 per sq km
Population Growth	0.67%
Nationality Split	Arabs (98%), Berbers (1%) and others (1%)
GDP (2023)	$48.5 Billion
GDP Per Capita (2023)	$3,978
GDP Growth (2023)	0%
Inflation – Consumer Prices (2023)	9.3%
Industries	Agriculture, industrial sector (footwear, manufacturing, mining, petroleum, textiles), services (information and communication technology [ICT], tourism)
Independence Day	March 20, 1956
Official Languages	Arabic
Dominant Religion	Islam
Currency	Tunisian Dinar
Time Zone	Central European Time (CET)
Calling Code	+216

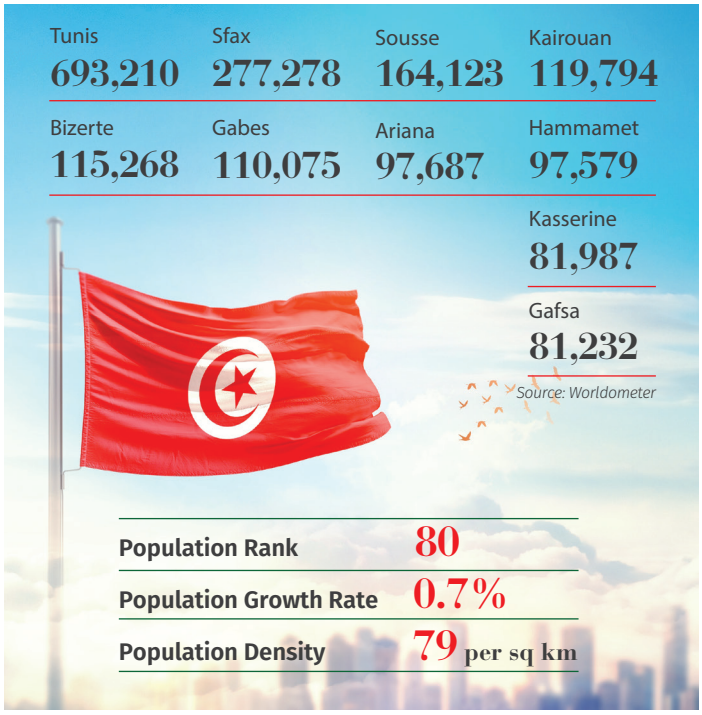
Sources: IMF, The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	861,600	439,100	422,500
5 – 9	1,043,400	535,700	507,700
10 – 14	1,041,300	538,400	502,900
15 – 19	883,300	456,400	426,900
20 – 24	799,800	409,600	390,200
25 – 29	841,800	422,600	419,200
30 – 34	935,800	462,600	473,200
35 – 39	954,400	459,300	495,100
40 – 44	915,000	439,000	476,000
45 – 49	826,000	398,300	427,700
50 – 54	726,200	356,200	370,000
55 – 59	672,700	324,300	348,400
60 – 64	601,000	292,200	308,800
65 – 69	480,200	231,000	249,200
70 – 74	334,700	156,000	178,700
75 – 79	183,500	78,000	105,500
80+	171,677	65,160	106,517

Source: World Population Review

Population Per City (2024)



Source: World Population Review

Economy

According to the World Bank, Tunisia's economy showed limited growth during the first half of 2024, expanding by only 0.6% year-on-year, following zero growth in 2023. By the end of the year, Tunisia is expected to be the only country in the region with real GDP still below pre-pandemic levels. As a result, the country's unemployment rate saw a slight increase, reaching 16% in the second quarter of 2024, marking the sixth consecutive year-on-year rise. Meanwhile, the labour force participation rate declined further and now stands 1.5 percentage points below its pre-COVID level.

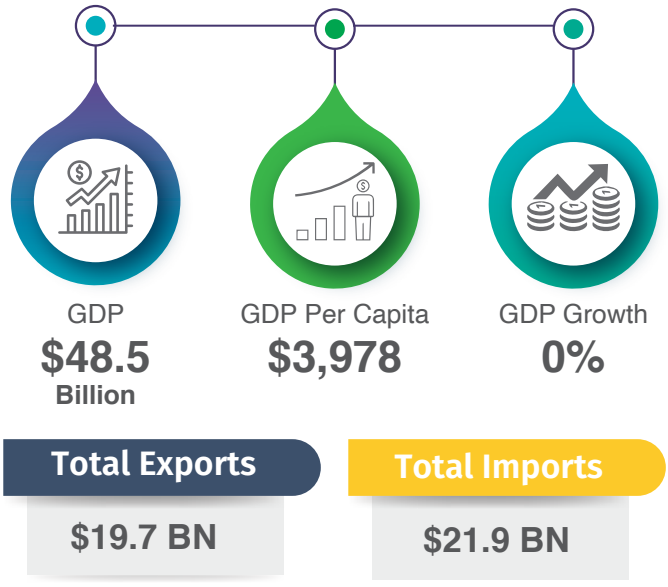
Economic performance was hindered by a modest recovery in agriculture and declines in key sectors, including oil and gas, garments and construction. Below-average rainfall restricted agricultural growth, which regained only one-third of the losses recorded in early 2023. The garment sector suffered due to weaker demand from the European Union – Tunisia's main export market. Meanwhile, oil and gas production continued its decade-long decline due to a lack of new investments. The construction sector was also affected by weak domestic demand and challenging external financing conditions, further slowing economic recovery.

Inflation has continued to decline since its February 2023 peak, reaching 6.7% in September 2024, the lowest level since January 2022. This decline was driven by lower global prices and weak domestic demand. However, food inflation remains elevated, exceeding its pre-COVID average due to the impact of drought and import restrictions, which have constrained domestic food supply. This poses a major challenge for lower-income households, as food represents a significant portion of their expenditures.

Indicators	*2024 (Estimated)*	*2025 (Projected)*	*2026 (Forecasted)*
Real GDP Growth	1.2%	2.2%	2.3%
CPI Inflation (Average)	7%	6%	5%

Source: World Bank

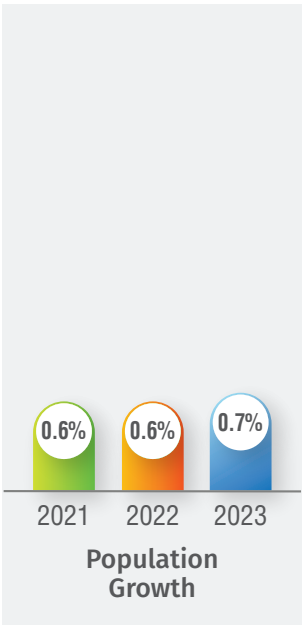
State of Economy Highlights (in 2023)

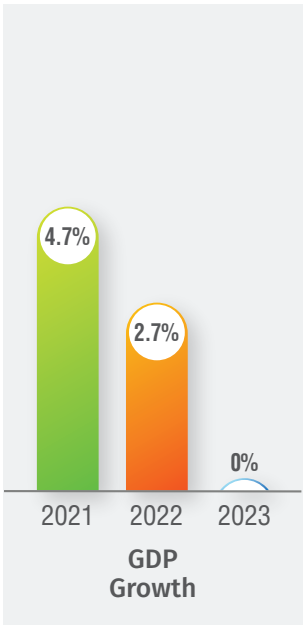


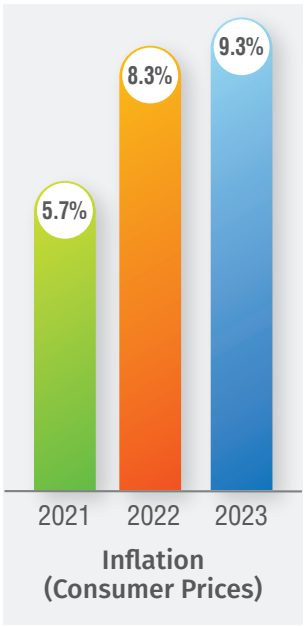
Sources: World Bank & CIA The World Factbook

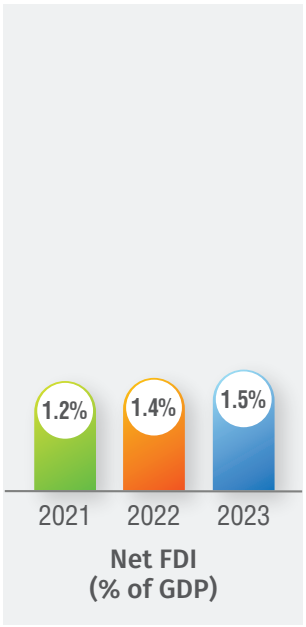


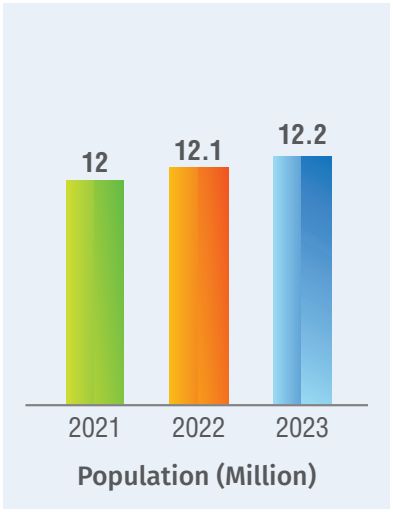
Key Macroeconomic Highlights



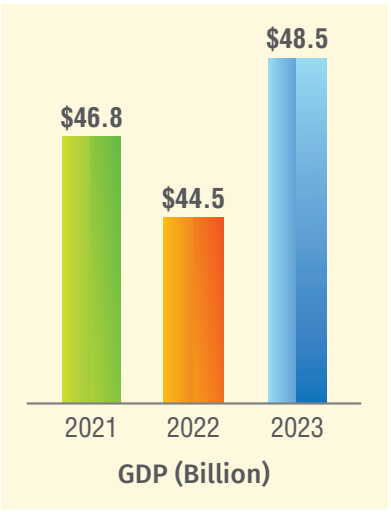






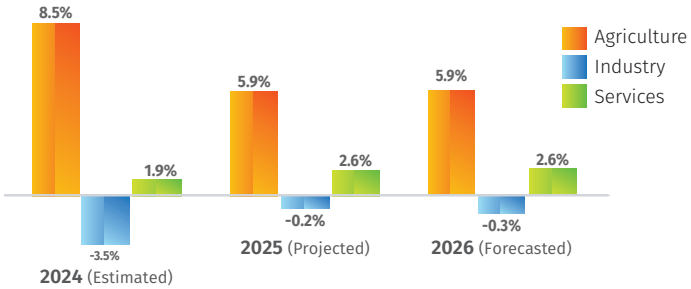






Sources: World Bank

Real GDP Growth by Sector (in %)



Source: World Bank

Growth Estimates (% of GDP)

	2024	2025 (Estimated)	2026 (Forecasted)
Export of Goods & Services	0%	4%	4%
Import of Goods & Services	3.7%	5%	4.5%

Sources: World Bank

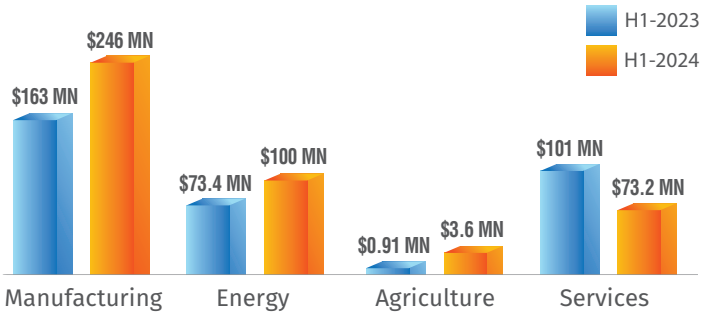
Temple of Juno Caelestis archaeological site, Dougga, Tunisia



Investment

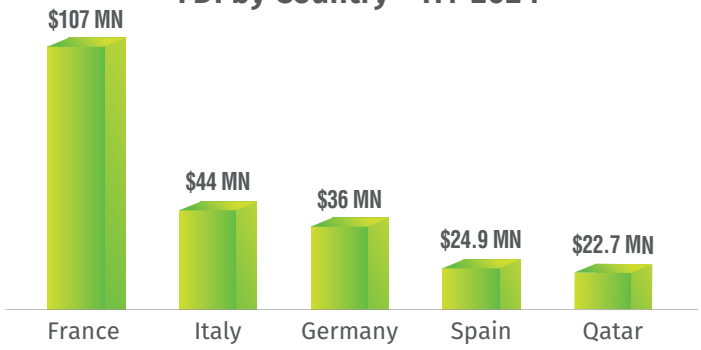
The country's foreign direct investment (FDI) stood at $430 million at the end of the first half of 2024, indicated Tunisian Foreign Investment Promotion Agency (FIPA). This represents an increase of 13.8%, 34.2% and 42% versus the same period in 2023, 2022 and 2021, respectively. A total of 610 investment projects, valued at approximately $1.1 billion, created around 4,820 jobs in the first half of 2024.

FDI by Sector



Source: Tunisian Foreign Investment Promotion Agency

FDI by Country – H1-2024



Source: Tunisian Foreign Investment Promotion Agency

Tunisia's 2030 Agenda for Sustainable Development

Tunisia is actively pursuing the 2030 Agenda for Sustainable Development. Key initiatives include:

- **Climate Action:** Aiming for a 45% reduction in carbon intensity by 2030 (compared to 2010 levels).
- **Renewable Energy:** Plans to increase renewable energy share to 35% by 2030.
- **Health:** Focus on improving maternal and child health, combating diseases and achieving universal health coverage.
- **Education:** Working to enhance access to education, especially in rural areas.
- **Gender Equality:** Promoting women's participation and equal opportunities.



View of the Mediterranean Sea, Sidi Bou Said, Tunisia

Tunisia Tourism Sector

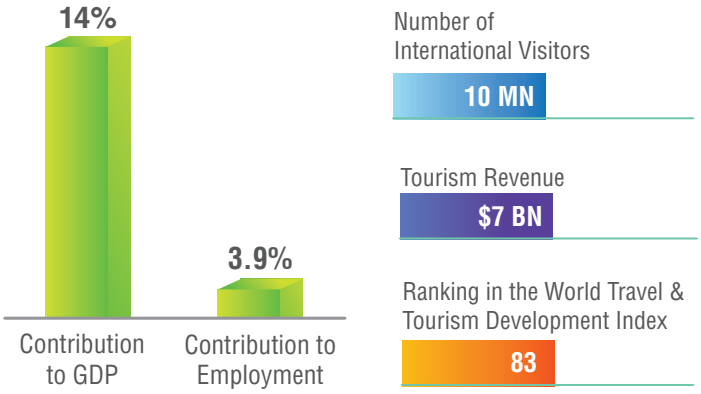
The World Travel & Tourism Council's (WTTC) 2024 Economic Impact Research indicates that Tunisia's travel & tourism sector is poised to contribute a record $7.66 billion to the national economy this year. This marks a significant increase in economic impact, job growth and domestic visitor spending. While international visitor spending is expected to recover partially, it may not reach pre-pandemic levels just yet, but it will come close to the 2019 peak.

The sector's contribution to Tunisia's economy is projected to represent 14% of the total GDP, with employment in the sector growing by 3.9%, reaching almost 418,000 jobs, or about one in nine jobs in the country. Domestic visitor spending is forecasted to grow by 5% to reach $3.89 billion, surpassing the 2019 levels slightly. While international spending is expected to grow by more than 12%, reaching $3.66 billion, it will still lag by nearly 9% compared to 2019.

Meanwhile, the reestablishment of Tunisia's Higher Council of Tourism will further support these projections, fostering collaboration between the public and private sectors. With continued government support, WTTC predicts the sector's contribution to GDP could exceed $10.65 billion by 2034, accounting for 16% of the economy and employing over 485,000 people.

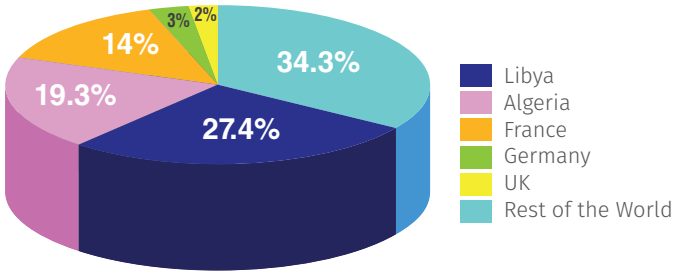

Archaeological site of Carthage, Tunisia

Tourism Index (2024)



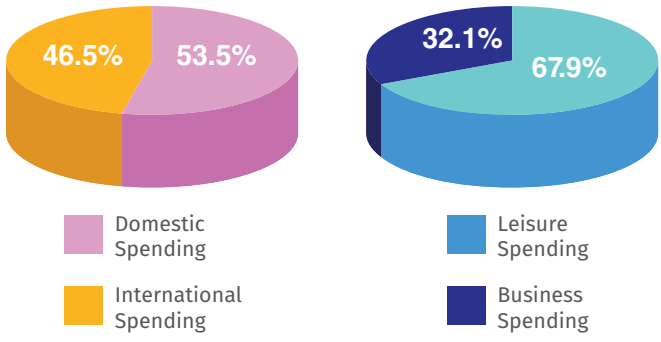
Sources: WEF Travel and Tourism Development Index & World Travel and Tourism Council

Inbound Arrivals (2023)



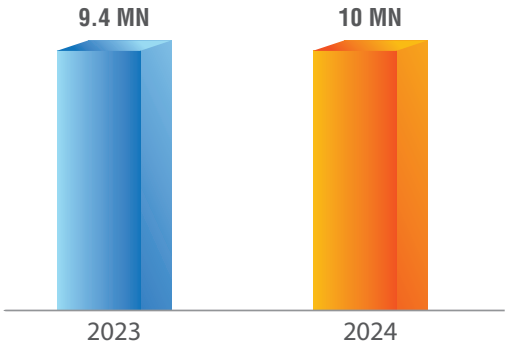
Sources: Oxford Economics, UN Tourism

Percentage Share of Total Spending (2023)

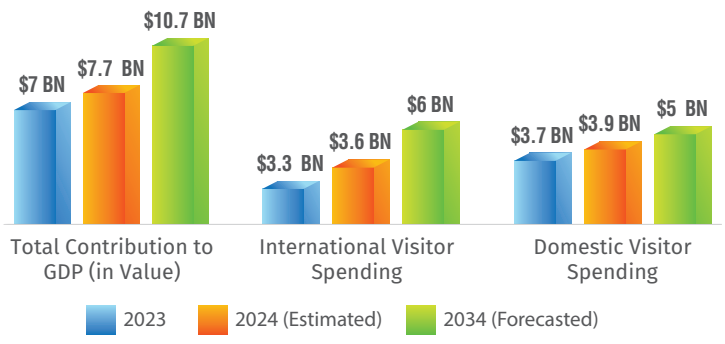


Sources: World Travel & Tourism Council

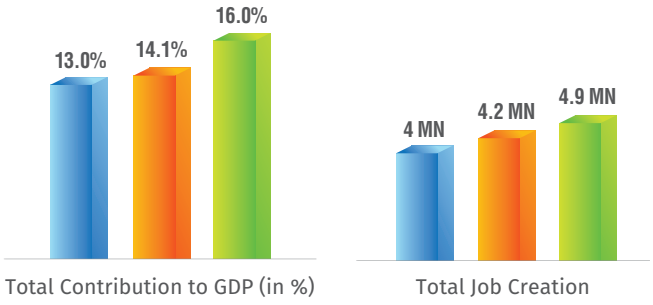
Tourist Footfall at a Glance



Source: National Tourism Office, Tunisia



Source: World Travel & Tourism Council



Tunisia Leisure & Entertainment Industry

The leisure & entertainment sector in Tunisia is expanding, highlighted by attractions such as Carthageland in Hammamet, enhancing the country's appeal to both domestic and international visitors. In 2024, the country welcomed over 10 million visitors, generating approximately $2.3 billion in tourism revenue. This upward trend is likely to continue as Tunisia aims to attract 10.2 million tourists and record revenues worth $2.5 billion in 2025.

Key Leisure & Entertainment Operators

- Aquapark Spongebob
- AQUASPLASH - Aquapark Thalassa Sousse
- ATLAS World
- Belvedere Park
- Carthageland
- Dah Dah Happy Land Entertainment Park
- Escape room Tunisia
- Hannibal Park
- KatKout
- Kidi Park Mall Of Sousse
- Medina of Tunis
- Magic City
- Magic Eye 3D Museum
- Monastir Karting
- PAINTBALL LA PLAYA
- Parc Aladin Bizerte
- Parc de Loisirs TRAMPOLIA
- Roman amphitheater of El Jem
- Sfax Land
- Spring Land/ Adem Park
- South Tunisia Adventures
- VR park Outmind
- Zinebledi



Magic City, Tunisia



Dougga Archaeological Site



Roman Amphitheatre of El Djem



Aquapark Spongebob



Magic Eye 3D Museum



Carthage Land Hammamet



Dah Dah Happy Land Entertainment Park



Hannibal Park



KatKout



Spring Land



Aqualand Hammamet



AquaSplash



Parc de Loisirs TRAMPOLIA



Kidi Park Mall of Sousse



Monastir Karting



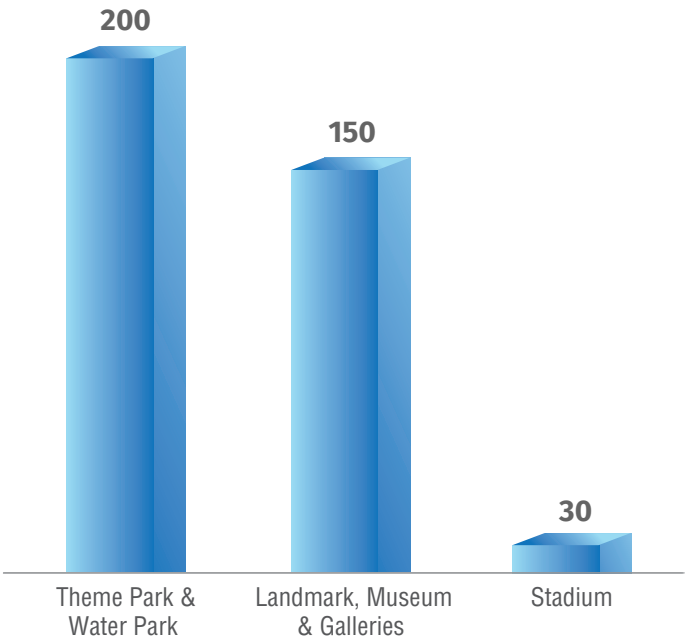
VR Park Outmind

Upcoming Mega Projects at a Glance

Tunisia's tourism sector is experiencing a significant resurgence, with projections indicating that visitor numbers are expected to surpass 10 million by the end of 2024. This uptick has bolstered tourism revenues, which reached approximately $2.2 billion by November 2024, a 6% increase from the previous year. The National Tourism Office has outlined a strategic roadmap for 2025, aiming to expand air connectivity to 13.3 million seats and launch the 'Tunisia 2025' promotional campaign. As family entertainment centres and theme parks in the Middle East & Africa are projected to grow 10% annually in the coming years, Tunisia's leisure & entertainment sector is expected to benefit from this. Collectively, these developments are anticipated to significantly contribute to Tunisia's economic growth in the near future.

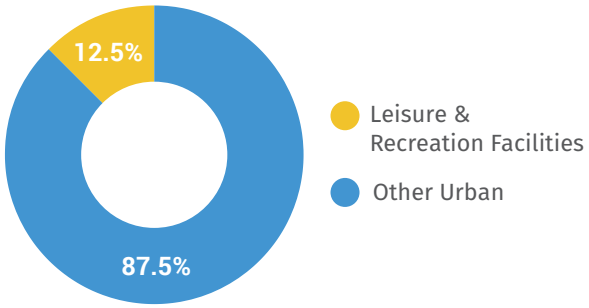
Tunisia's Leisure & Recreation Market Distribution

Current Estimated Value of Projects (USD Million)

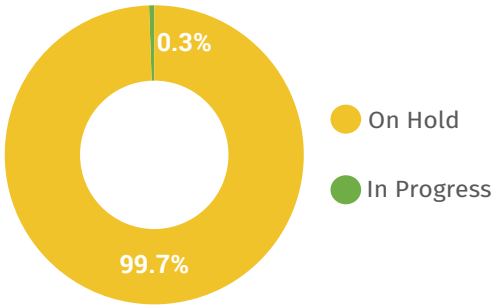


Source: BNC

Contribution of Leisure & Recreation Industry to Tunisia's Urban Sector



Stage-wise Distribution



La Perle du Lac

Value: NA
Stage: Under Construction
Developers: Al Buhaira Invest
Main Contractors: Bouzguenda Frères - Bonna Tunisie
Description: La Perle du Lac is a large urban development project located on the Northwest and Southwest shores of North Tunis Lake. It is one of three development areas (Northwest and Southwest shores, North shores and Northeast shores) of "Les Berges du Lac", a mega development project around the lake. Envisioned as the "reconciliation of the city centre with its waterfront", the project aims to create a modern, smart and sustainable city, providing a high quality urban experience for its residents while preserving the natural environment.
Completion: Q1 2030





Panoramic view of Kelibia, Tunisia



Tourist boats in the shape of ancient pirate ships, Sousse, Tunisia



Traditional Yemeni heritage Sana'a, Yemen



REPUBLIC OF YEMEN

Yemen's economy remains in a state of severe distress, grappling with prolonged conflict, political fragmentation and escalating regional tensions. As of early May 2025, Yemen's situation has further deteriorated due to escalating regional conflicts and internal strife. Amid the ongoing blockade of oil exports by the Houthis against the Internationally Recognized Government (IRG) of Yemen and the escalating conflict in the Middle East, the country's situation continues to deteriorate.

Geography

Yemen is located in the southwestern corner of the Arabian Peninsula, sharing borders with Saudi Arabia to the north and Oman to the east, while its western and southern coasts are bounded by the Red Sea, the Gulf of Aden and the Arabian Sea. The country features diverse landscapes, including coastal plains, rugged mountains and vast deserts. The highlands, which include the capital Sana'a, experience a more temperate climate compared to the arid lowlands. Yemen's strategic location at the Bab el Mandeb Strait, a crucial global maritime chokepoint, makes it vital for international trade, particularly oil shipments.

Historically, Yemen is one of the world's oldest centres of civilization. It was home to the ancient Sabaean Kingdom (9th century BCE–275 CE), renowned for its trade routes and the legendary Queen of Sheba. Throughout history, Yemen has been influenced by various empires, including the Romans, Ottomans and later the British, who controlled the southern port city of Aden. North and South Yemen existed as separate entities until their unification in 1990. However, the country has since faced political instability, civil conflicts and humanitarian crises.

Yemen's strategic importance extends beyond its geography. The Bab el Mandeb Strait connects the Red Sea to the Indian Ocean, making it a crucial passage for oil and goods transported between Europe, Asia and Africa. Political instability in Yemen poses risks to regional and global trade, attracting international diplomatic and security attention. If peace and stability are restored, Yemen's location, historical wealth and natural resources could support economic recovery and regional integration, reinforcing its role as a strategic player in the Arabian Peninsula.

Population

According to the World Population Review, Yemen's population in 2024 stood at 41.8 million and is projected to reach 48.8 million by 2031. The country's population has a slightly higher male-to-female ratio of 1.03 to 1, with a median age of 18.99 years for males and 19.55 years for females.



Yemen at a Glance

Official Name	Republic of Yemen
Land Area	527,968 square kilometres (sq km)
Capital	Sana'a
Government	In transition
Population (2024)	41.8 million
Population Density	76.9 per sq km
Population Growth	2.9%
Nationality Split	Arabs
GDP (2023)	$18.8 billion
GDP Per Capita (2023)	$552
GDP Growth (2023)	-2.0%
Inflation (2023)	0.9%
Industries	Agriculture, construction, fishing, handicrafts, oil & gas, manufacturing, trade & services
Unification Day	May 22, 1990
Official Languages	Arabic
Dominant Religion	Islam
Currency	Yemeni Rial
Time Zone	Arabian Standard Time (GMT+3)
Calling Code	+967

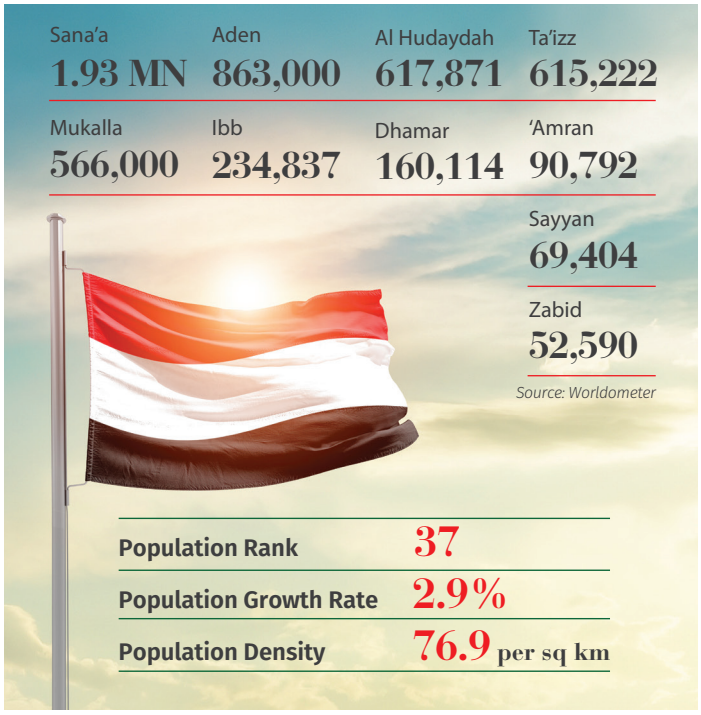
Sources: The CIA World Factbook, World Bank, World Population Review

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 4	6,442,800	3,303,200	3,139,600
5 – 9	5,573,400	2,854,200	2,719,200
10 – 14	4,675,100	2,392,100	2,283,000
15 – 19	4,183,500	2,138,100	2,045,400
20 – 24	3,658,900	1,864,400	1,794,500
25 – 29	3,273,200	1,656,700	1,616,500
30 – 34	3,048,500	1,539,300	1,509,200
35 – 39	2,570,600	1,298,500	1,272,100
40 – 44	2,023,700	1,025,900	997,800
45 – 49	1,506,000	760,900	745,100
50 – 54	1,138,600	568,800	569,800
55 – 59	854,300	418,600	435,700
60 – 64	610,300	290,900	319,400
65 – 69	419,300	192,800	226,500
70 – 74	271,400	118,900	152,500
75 – 79	190,300	79,800	110,500
80+	142,742	54,814	87,928

Source: World Population Review

Population Per City (2024)



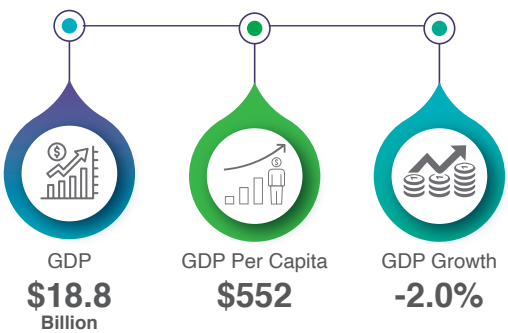
Source: World Population Review

Economy

According to the World Bank, Yemen continues to face a dire situation as the Houthis maintain their blockade on oil exports from the Internationally Recognized Government (IRG), while conflicts in the Middle East and Red Sea escalate. The brief economic rebound seen in 2022, following a cease-fire, proved to be short-lived. By 2023 and 2024, GDP per capita had experienced sharp declines once again, exacerbating food insecurity and deepening widespread poverty.

Yemen's prolonged conflict has led to a devastating humanitarian crisis, compounded by the fragmentation of its political and economic structures. Since the war began in 2015 – when the Houthis seized Sana'a and forced IRG into exile – the country's real GDP per capita has fallen by 54%, plunging the majority of the population into poverty and severely depleting human capital. The ongoing conflict has effectively split Yemen into two separate economic zones, each governed by its own institutions and monetary authorities, leading to stark economic disparities. Although the United Nations (UN)-sponsored truce in 2022 temporarily stabilised conditions, economic contraction resumed in 2023 and 2024 due to the Houthi-imposed blockade on IRG oil exports. By the end of August 2024, the ACLED (Armed Conflict Location & Event Data) Dashboard for Red Sea Attacks recorded approximately 373 violent incidents linked to Houthi operations in the region. This has had a significant impact on global trade, causing more than 60% decline in maritime traffic through the strategic Suez Canal and Bab El-Mandeb Strait, which collectively handle 30% of the world's container shipping.

State of Economy Highlights (in 2023)



Source: World Bank

Meanwhile, according to Yemen's Ministry of Finance in Aden, government revenues (excluding grants) declined by 42% in the first half of 2024, following a steep 50% drop in 2023. At the same time, fiscal expenditures continued to grow, at a slower rate. The prolonged suspension of oil exports and Yemen's heavy dependence on imports have worsened external financial pressures, causing the Yemeni Rial to depreciate in the IRG-controlled Aden market—from 1,619 per US dollar in January 2024 to 1,917 by August. Further complicating the economic environment, rising tensions between the Houthis and the IRG over banking sector regulations in early 2024 have raised concerns about the sector's stability. The overall situation remains fragile.

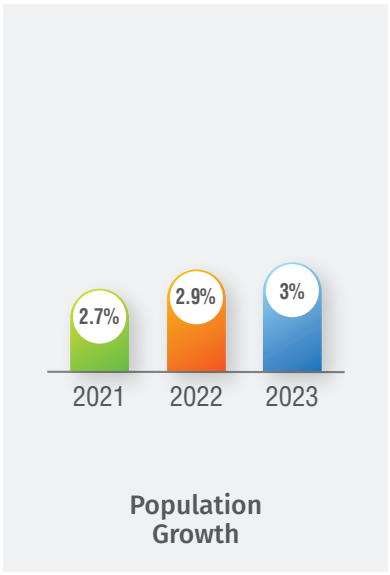
Looking ahead to 2025, Yemen's macroeconomic outlook remains challenging. With peace negotiations stalled and persistent domestic and regional conflicts, no resumption of oil exports is expected in the near term. Consequently, real GDP growth is projected to remain modest at just 1.5%, reflecting only slight improvements in the non-oil sector. The services industry, particularly transportation, may see minor gains as Yemenia Airways expanded operations under a UN-mediated agreement. However, without a clear path to lasting peace and security, revenue growth, exports and public finances will remain under severe strain. Inflation is expected to rise further, fuelled by continued currency depreciation in IRG-controlled areas.

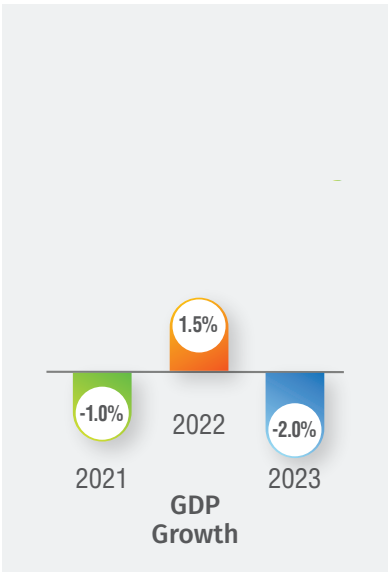
Despite these challenges, there remains hope for a resolution. A sustained peace agreement could unlock significant economic, social and financial benefits for all parties in Yemen, counteracting years of conflict-driven decline. According to World Bank projections, a durable truce and comprehensive peace deal could facilitate a swift economic recovery, supported by international assistance, reconstruction initiatives and essential post-conflict reforms. The country's future depends on resolving the on-going conflicts, securing donor support and implementing necessary reforms to facilitate reconstruction and long-term stability.

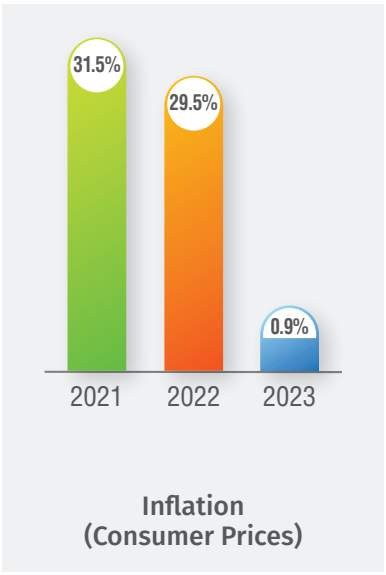
Indicators	*2022*	*2023*	*2024 (Estimated)*	*2025 (Forecasted)*
Real GDP Growth	1.5%	-2.0%	-1.0%	1.5%
CPI Inflation (Average)	29.5%	0.5%	16.3%	20.7%

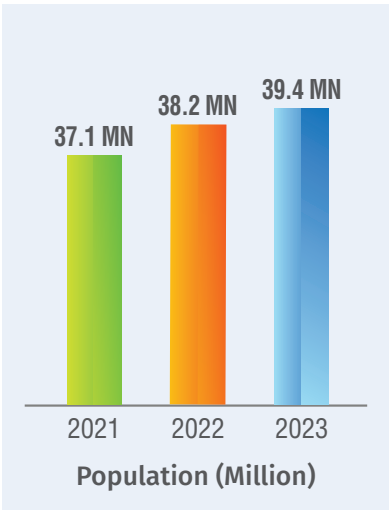
Source: World Bank

Key Macroeconomic Highlights

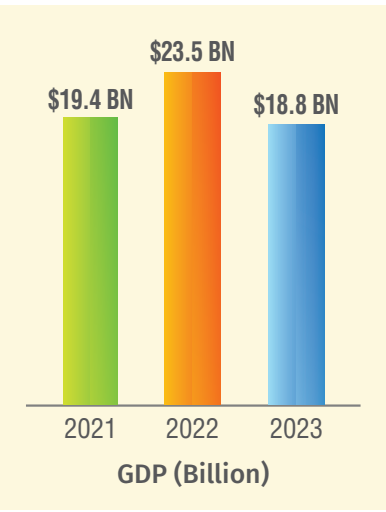








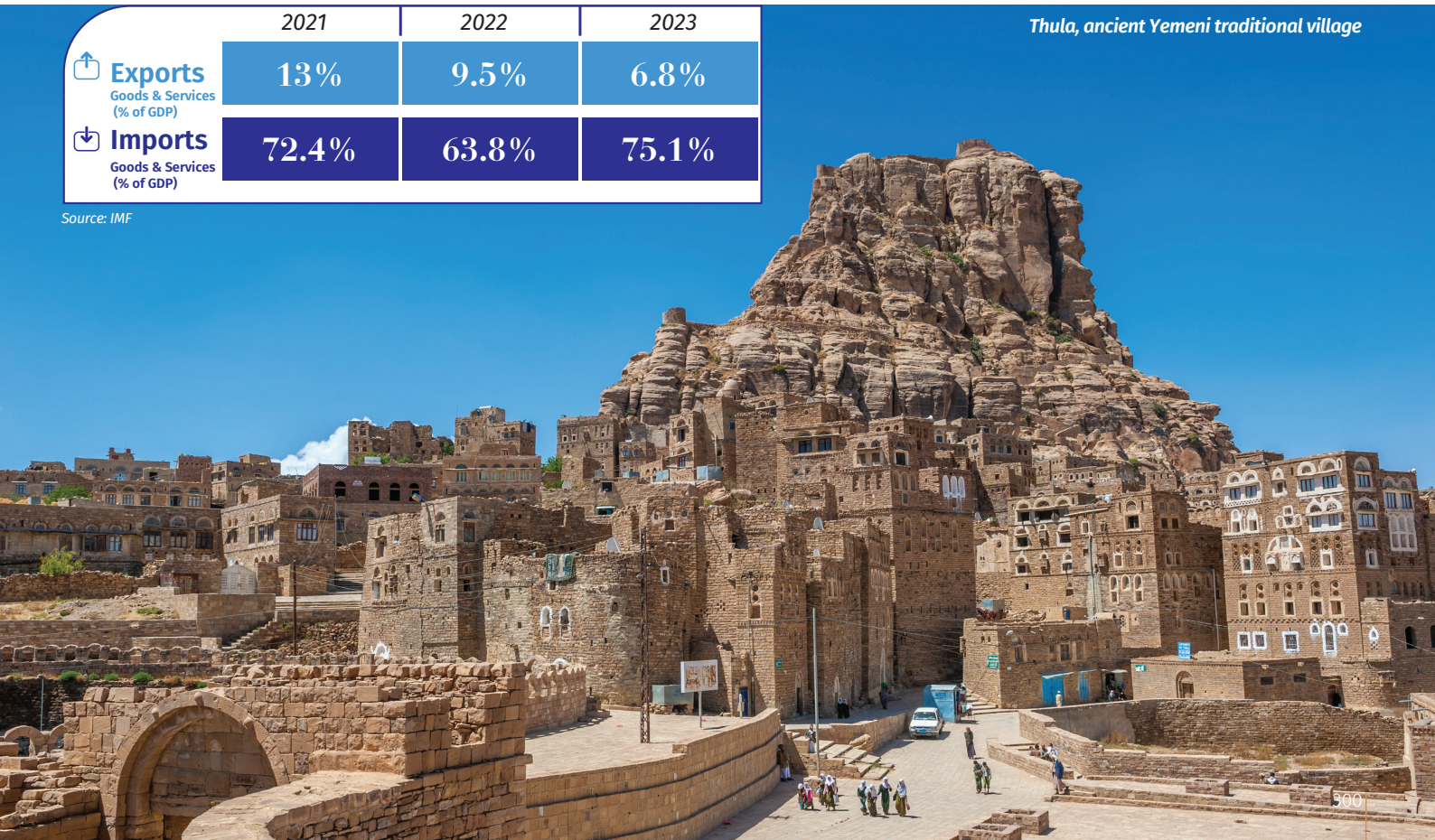




Sources: World Bank

	2021	2022	2023
Exports Goods & Services (% of GDP)	13%	9.5%	6.8%
Imports Goods & Services (% of GDP)	72.4%	63.8%	75.1%

Source: IMF

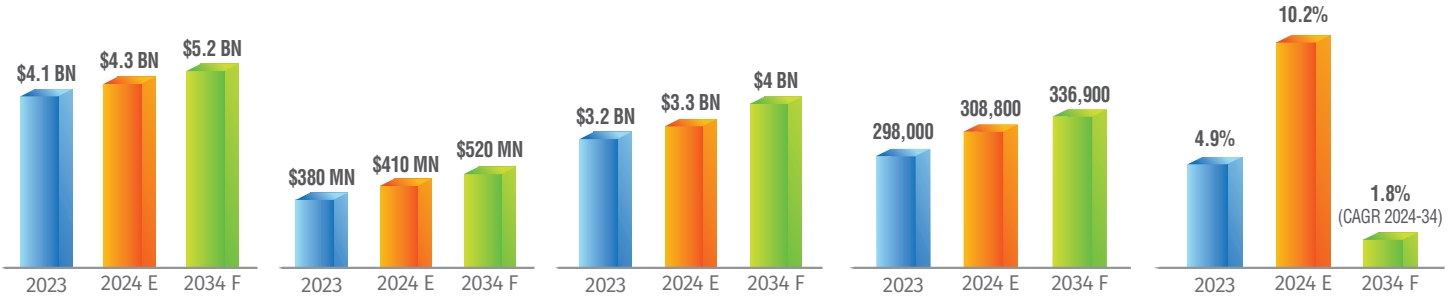


Thula, ancient Yemeni traditional village

Yemen Tourism Sector

Yemen's tourism sector has been severely impacted by ongoing conflicts and humanitarian crises since 2015. Resultantly, its rich cultural heritage and natural beauty have become largely inaccessible to international tourists due to security concerns and infrastructural damages. In 2015, international tourism receipts plummeted by over 90% compared to the previous year, dropping from approximately $1.2 billion in 2014 to $116 million in 2015, with no significant recovery since then. For perspective, according to more recent data from the World Travel and Tourism Council (WTTC), international visitor spending in Yemen stood at $380 million in 2023, which is an increase from 2015, but significantly lesser than the 2014 levels. Overall, as of 2025, Yemen's economic outlook remains bleak, with ongoing internal and regional conflicts exacerbating the situation.

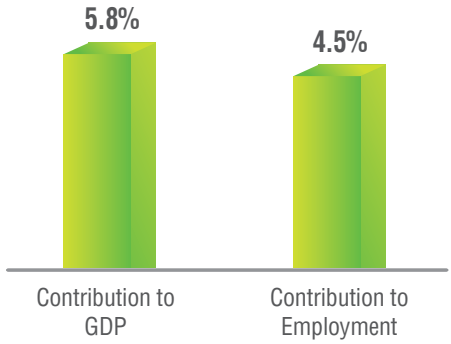
The International Monetary Fund (IMF) projects continued economic contraction, further diminishing prospects for tourism revival. Additionally, the humanitarian crisis has escalated, with an estimated 19.5 million people requiring assistance, reflecting the country's instability and further deterring potential visitors. Given these circumstances, the immediate future of Yemen's tourism industry appears grim. The sector's revival is contingent upon achieving lasting peace, political stability and substantial reconstruction efforts to restore infrastructure and ensure safety for travellers.



Source: World Travel & Tourism Council

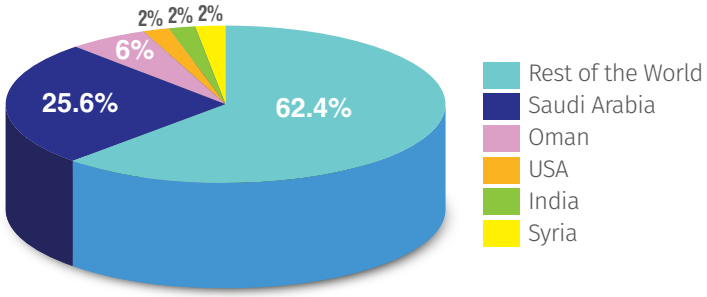
E: Estimated
F: Forecasted

Tourism Index (2024)



Source: World Travel and Tourism Council

Inbound Arrivals (2023)



Sources: Oxford Economics, UN Tourism



Al Saleh Mosque, Yemen

Yemen Leisure & Entertainment Industry

Being home to UNESCO-listed historical sites Yemen boasts a rich cultural heritage and diverse landscapes. However, years of conflict and instability have severely impacted its growth. Reconstruction efforts are being aimed to revitalise key tourism destinations such as Socotra, Sana'a and Shibam.

In Sana'a, leisure & entertainment facilities such as the Magical City Family Entertainment Center and Fun City offer a variety of attractions catering to all age groups, providing residents with accessible recreational options.

While the leisure & entertainment sector in Yemen faces hurdles due to economic and infrastructural constraints, initiatives are being undertaken to diversify entertainment options for families and fostering community engagement.

Key Leisure & Entertainment Operators

- Fun City Park
- Magical City Family Entertainment Center



Old City of Sana'a



Historic Town of Zabid



Old Walled City of Shibam



Al Sabeen Park



Fun City Park



Magical City Family Entertainment Center



Socotra Archipelago



LEBANON, PALESTINE, SYRIA: AN OVERVIEW

The Middle East region – with countries including Lebanon, Palestine and Syria – is experiencing varied economic and tourism dynamics, influenced by ongoing conflicts, political instability and global economic trends.



LEBANON

Geography

Lebanon is bordered by Syria to the north and east, Israel to the south and the Mediterranean Sea to the west. Despite its compact size, Lebanon's geography is diverse, featuring coastal plains, rugged mountains and fertile valleys, including the Bekaa Valley, a key agricultural hub. Its Mediterranean coastline has historically made Lebanon a vital trade and cultural gateway between the East and the West. The Port of Beirut, one of the region's major seaports, enhances its strategic role in commerce and logistics. In fact, Beirut was once known as the 'Paris of the Middle East.' Lebanon's location at the intersection of regional conflicts and geopolitical interests also makes it a focal point for diplomacy and international affairs. Despite ongoing economic and political challenges, Lebanon remains strategically important due to its position, trade routes and regional influence.

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 10	952,700	489,500	463,200
10 – 20	1,090,900	561,700	529,200
20 – 30	893,300	458,200	435,100
30 – 40	707,500	322,700	384,800
40 – 50	673,500	313,100	360,400
50 – 60	634,500	296,400	338,100
60 – 70	478,200	220,800	257,400
70 – 80	267,000	124,300	142,700
80 – 90	94,300	33,300	61,000
90 – 100	14,100	3,700	10,400

Source: World Population Review



Sunset over the Pigeon rocks, Beirut



Lebanon at a Glance

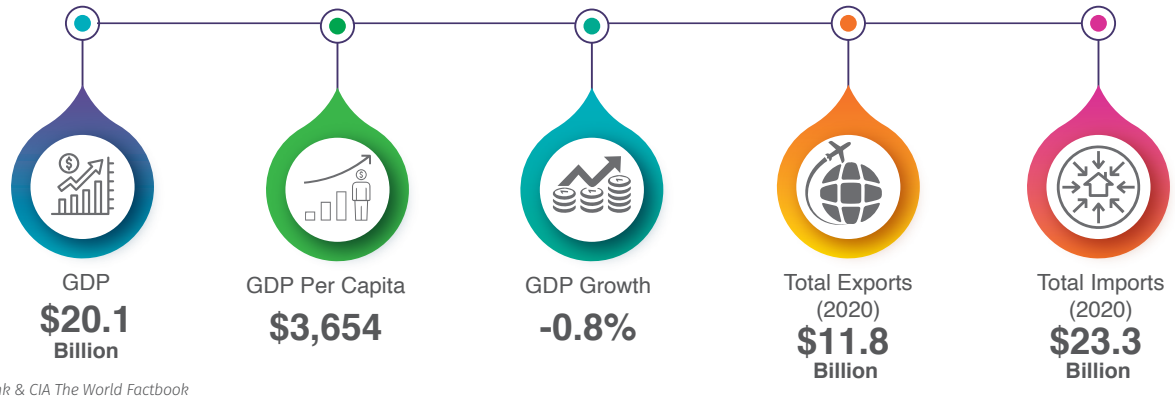
Official Name	Lebanese Republic
Land Area	10,230 square kilometres (sq km)
Capital	Beirut
Government	Parliamentary democratic republic
Prime Minister	Nawaf Salam
Population (2024)	5.8 Million
Population Density	571.8 per sq km
Population Growth	0.5%
Nationality	Lebanese
GDP (2023)	$20.1 Billion
GDP Per Capita (2023)	$3,654
GDP Growth (2023)	-0.8%
Inflation – Consumer Prices (2023)	221.3%
FDI Net Inflow (% of GDP – 2023)	2.9%
Industries	Agriculture, commerce, construction, energy, financial services, industrial sector
Declaration of Independence	November 22, 1943
Official Language	Arabic
Dominant Religions	Islam (majority); Christianity (minority)
Currency	Lebanese pound
Time Zone	Eastern European Standard Time (GMT+2)
Calling Code	+961

Sources: The CIA World Factbook, World Bank & World Population Review

Economy

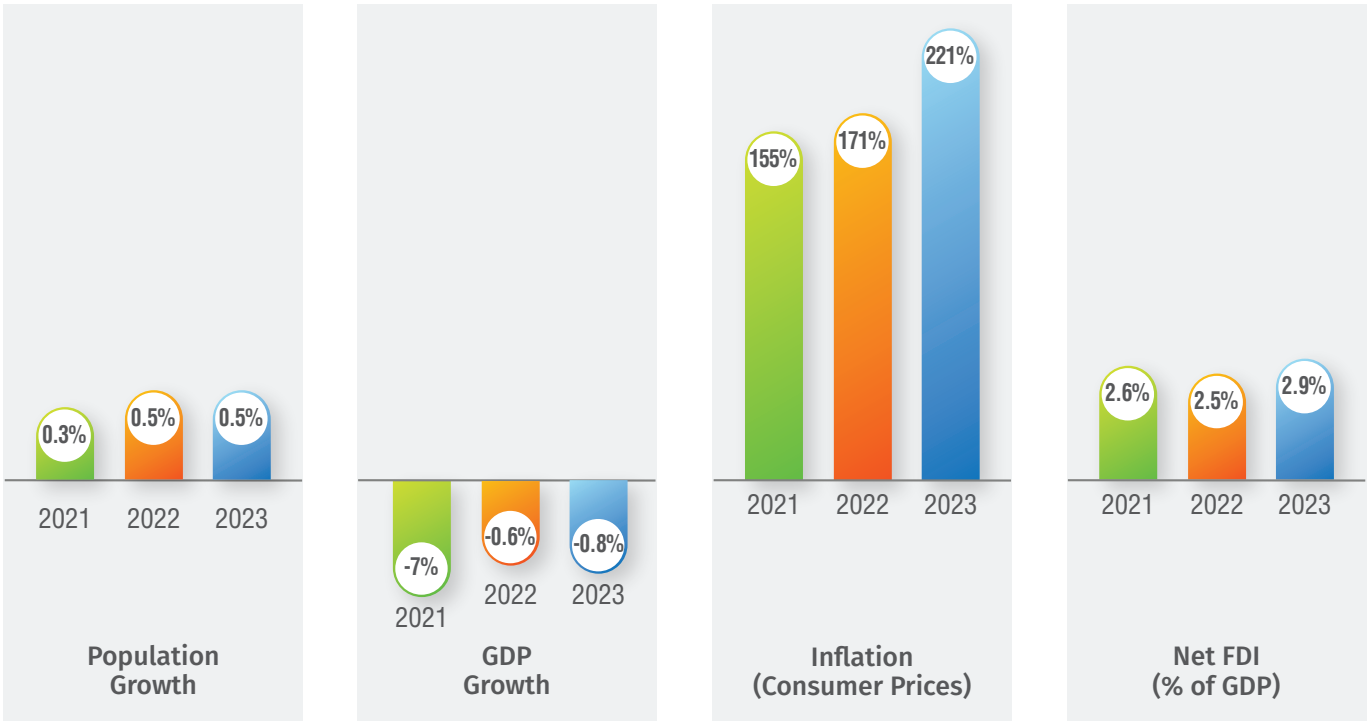
According to the World Bank, Lebanon's economy remains in a precarious state, grappling with political instability, infrastructural challenges and the spillover effects of regional conflicts. Since October 2023, the conflict in the Middle East has spilled over into Lebanon, escalating military tensions along the southern border with Israel, further straining the country's already fragile economy. Key sectors like tourism and agriculture have suffered, infrastructure has been damaged, and mass displacement has led to a sharp drop in consumption, contributing to a 0.8% GDP contraction in 2023. Prior to the major escalation in September 2024, Lebanon's real GDP was expected to shrink by 1% in 2024. However, the ongoing conflict continues to take a devastating human and economic toll, leaving the country's outlook highly uncertain. The World Bank has refrained from providing forecasts beyond 2024 due to the high degree of uncertainty.

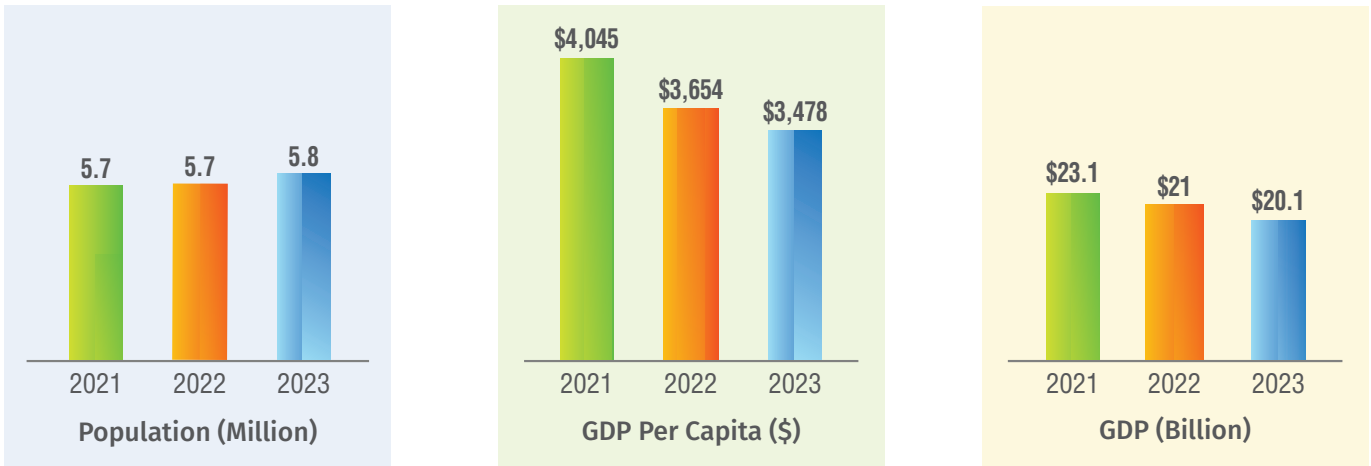
State of Economy Highlights (in 2023)



Sources: World Bank & CIA The World Factbook

Key Macroeconomic Highlights





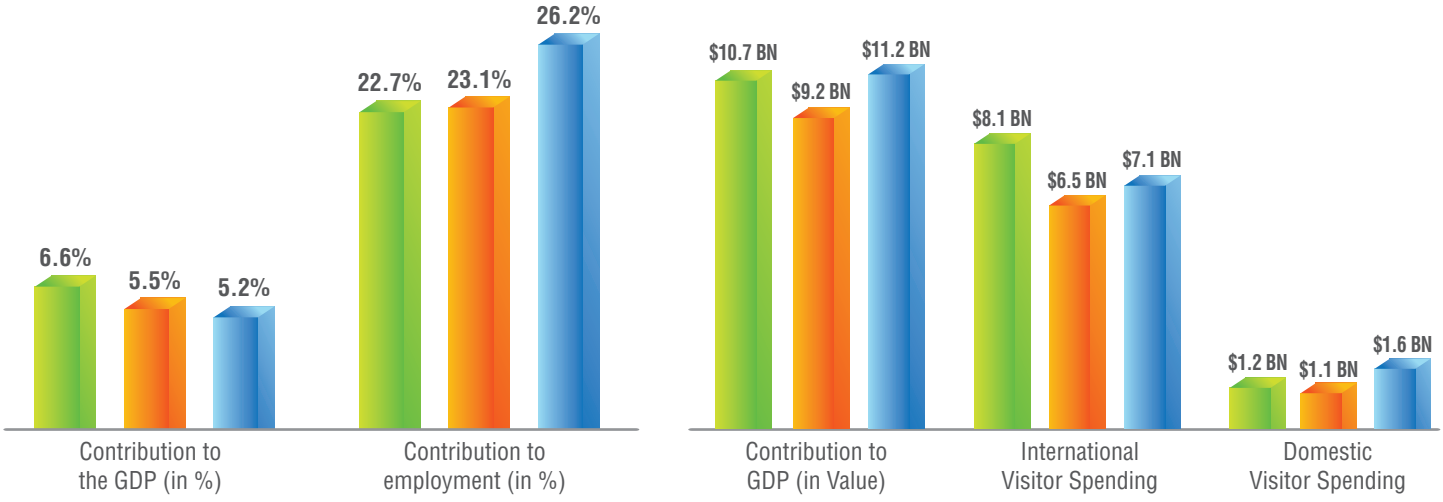
Sources: World Bank

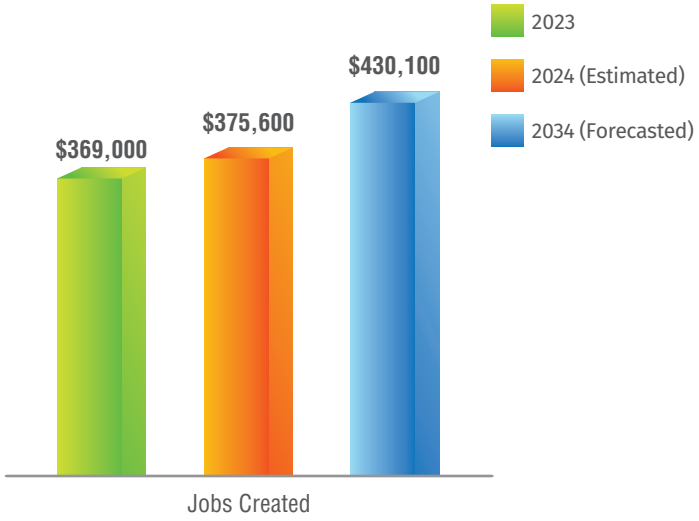
Lebanon Tourism Sector

Once a vibrant sector, tourism in Lebanon has suffered due to security concerns and economic instability. The decline in tourism has further strained the economy, affecting employment and foreign exchange earnings.

Ranking in the World Travel and Tourism Development Index **2024 – 79**

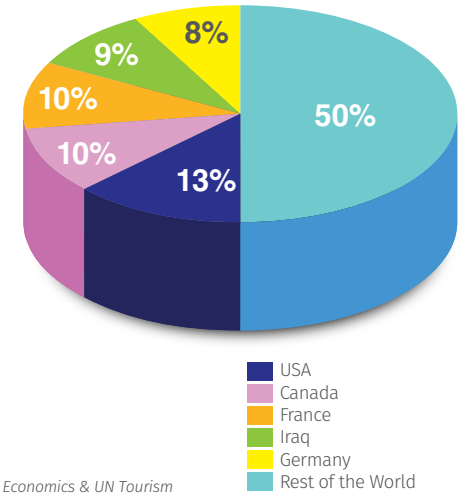
Tourism Index (2024)





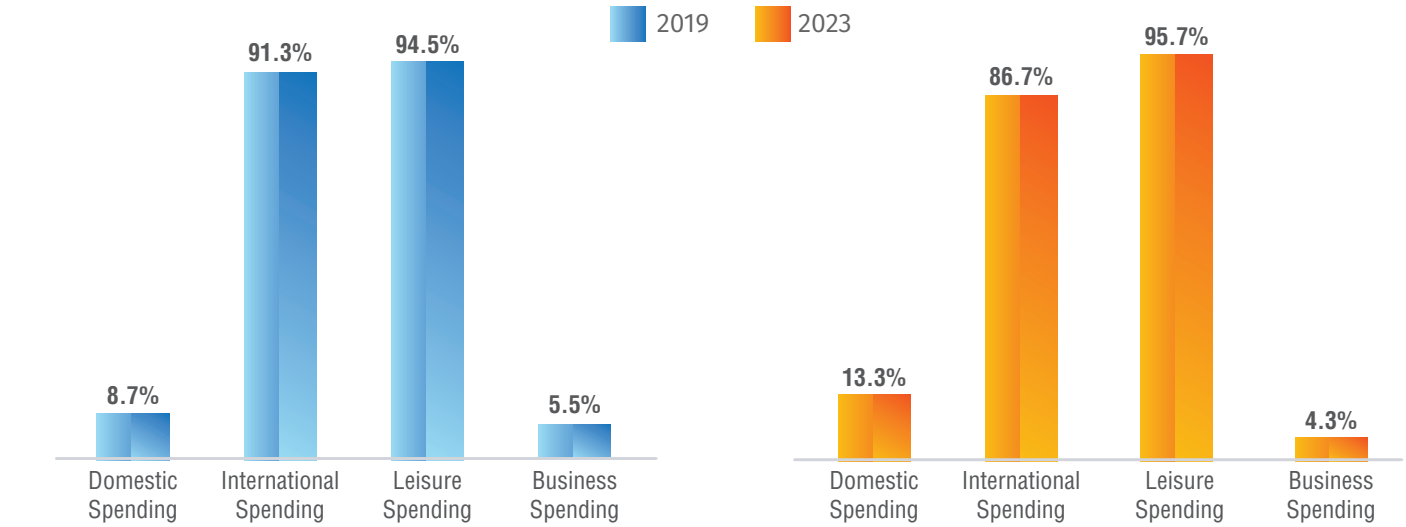
Source: World Travel & Tourism Council

Inbound Arrivals



Sources: Oxford Economics & UN Tourism

Percentage Share of Total Spending



Source: World Travel & Tourism Council

Key Leisure & Entertainment Operators

- Aquaville
- Beirut Amusement Park
- Besten El Hor
- Birak Park
- CosmoCity
- Crazy Events
- Dino City Prehistoric Park
- Dream Park
- Guanabana Resort
- Master Escape Room
- Score Bowling & Games
- Waterland Resort & Waterpark
- Waves Aqua Park and Resort



Aquaville



CosmoCity



Dino City Prehistoric Park



Dream Park



Score Bowling & Games



Waves Aqua Park and Resort



Sidon Harbour, Lebanon

Upcoming Mega Projects at a Glance

Beirut Museum of Art



Value: USD 100 million
Stage: Under Construction
Developer: The Association for the Promotion and Exhibition of the Arts in Lebanon
Main Contractor: Abniah Engineering & Contracting Co.
Description: The project involves the construction of a museum of art for which a 124-metre (m) tower will be the centrepiece of the complex that the project backers describe as “a symbolically charged site that once marked the dividing lines in the Lebanese civil war”. The tower will be divided into a dozen 12m cubes. The lower three will act as circulation spaces for the main galleries while the rest will house a library, temporary exhibition spaces, artists in residence and classes.
Completion: Q4 2026



Zaituna Bay of Mediterranean Sea, Beirut



PALESTINE

Geography

Palestine shares borders with Israel to the north, west and east, and Jordan to the east of the West Bank, while Gaza borders Egypt to the southwest. The region's geography includes coastal plains, central highlands and the Jordan Valley, with the Jordan River serving as a crucial water source. The country's strategic importance stems from its historical and religious significance, particularly Jerusalem, a sacred city for Islam, Christianity and Judaism. Its location at the crossroads of Africa, Asia and Europe has made it a focal point for trade and cultural exchange for centuries. However, ongoing geopolitical tensions have shaped its modern landscape, influencing regional security, diplomacy and economic stability. Despite challenges, Palestine remains a key player in Middle Eastern affairs, with its status central to regional peace efforts and international political discourse.

Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 10	1,432,300	732,600	699,700
10 – 20	1,223,400	614,000	609,400
20 – 30	937,200	461,500	475,700
30 – 40	771,900	383,500	388,400
40 – 50	486,200	235,200	251,000
50 – 60	318,500	152,200	166,300
60 – 70	199,500	94,500	105,000
70 – 80	96,100	43,400	52,700
80 – 90	28,000	10,600	17,400
90 – 100	2,260	560	1,700

Source: World Population Review



Dome of the Rock, Al-Aqsa mosque, Old City of Jerusalem



Palestine at a Glance

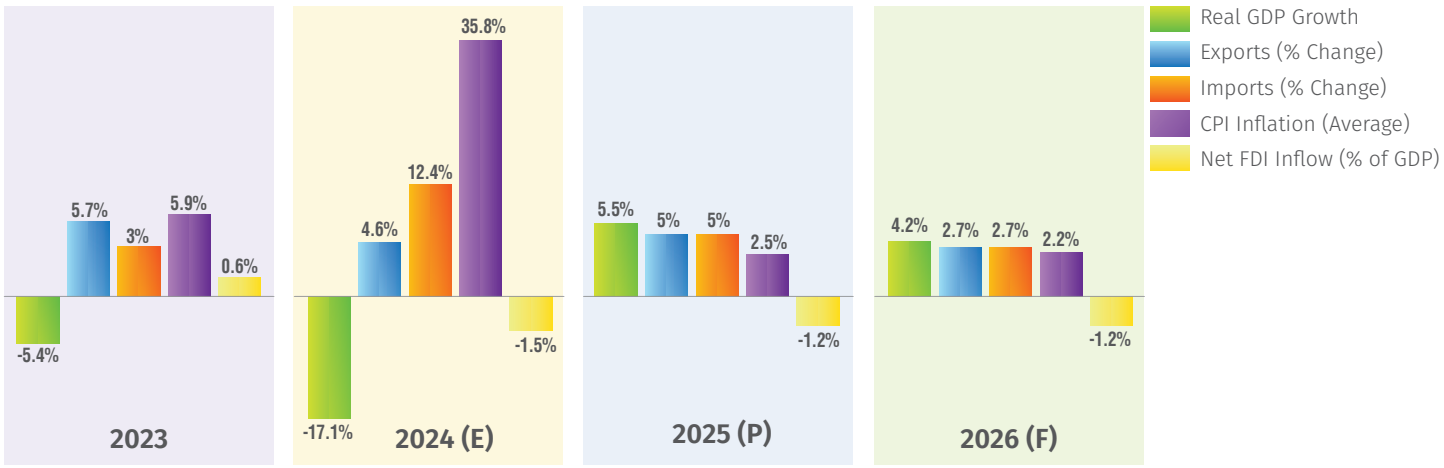
Official Name	State of Palestine
Land Area	6,020 sq km
Capital	Jerusalem (proclaimed capital) Ramallah (administrative centre)
Population (2024)	5.5 Million
Population Density	928.5 per sq km
Population Growth	1.97%
Nationality	Palestinians
GDP (2023)	$17.4 Billion
GDP Per Capita (2023)	$3,372
GDP Growth (2023)	-5.4%
Inflation – Consumer Prices (2023)	5.9%
FDI Net Inflow (% of GDP – 2023)	0.6%
Industries	Construction, food & beverage, leather & shoes, traditional & handicrafts
Declaration of Independence	November 15, 1988
Official Language	Arabic
Dominant Religion	Islam
Currencies Used	Israeli Shekels, US Dollars, Jordanian Dinars
Time Zone	Eastern European Standard Time (GMT+2)
Calling Code	+970

Sources: The CIA World Factbook, World Bank & World Population Review

Economy

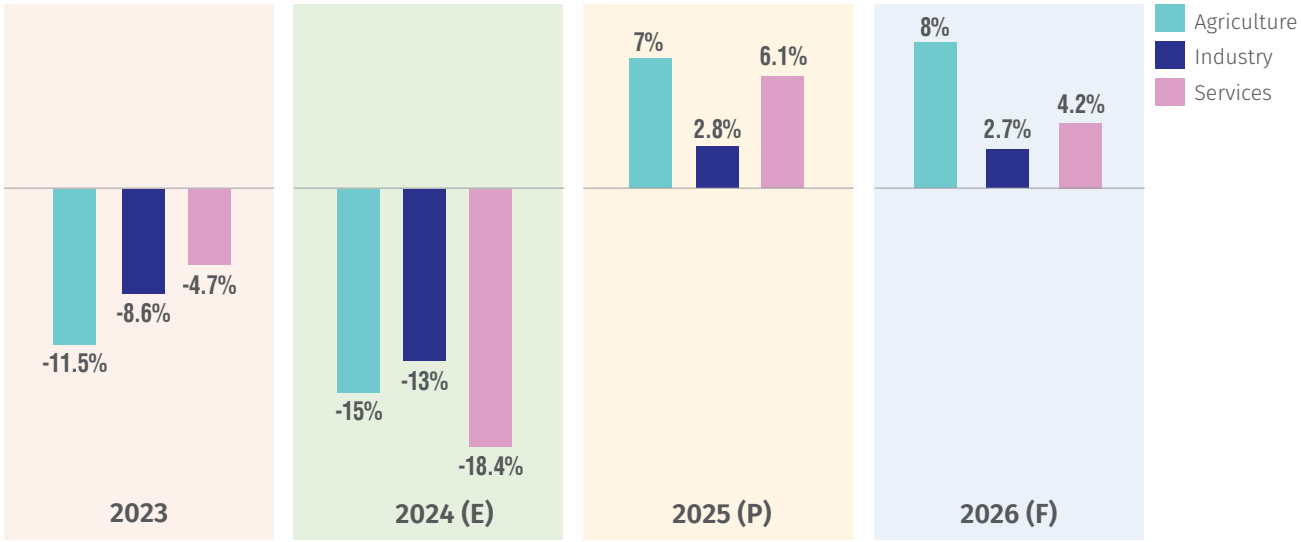
The Palestinian economy has been severely impacted by the recent conflicts. In 2023, the GDP per capita stood at $3,372, a 12% drop from 2022, with Gaza experiencing a 28% decline. The outlook for 2024 remains highly uncertain, with projections indicating a potential economic contraction between 6.5% and 9.6%, the World Bank estimated.

State of Economy Highlights – Annual Change in Percentage



Source: World Bank
Footnote: E: Estimated P: Projected F: Forecasted

Sectoral Growth – Annual Change in Percentage



Source: World Bank
Footnote: E: Estimated P: Projected F: Forecasted

Palestine Tourism Sector

Tourism, particularly religious tourism, has declined due to security concerns and travel restrictions, affecting local businesses and employment.



Al Khalady Mosque in Gaza, Palestine



SYRIA

Geography

Syria shares borders with Turkey to the north, Iraq to the east, Jordan to the south and Lebanon and Israel to the southwest. It also has a Mediterranean coastline to the west, providing access to vital maritime trade routes. The country's diverse geography includes fertile plains, desert expanses and the strategic Euphrates River, which is crucial for agriculture and water supply. Its location makes it a geopolitical focal point, influencing regional security, energy transit routes and global power dynamics. Damascus, one of the world's oldest continuously inhabited cities, further reinforces Syria's cultural and political significance. Despite recent conflicts, Syria remains central to Middle Eastern geopolitics, with its stability and reconstruction playing a critical role in regional and international affairs.



Structure of the Population: 2024

Age Group	Total	Male	Female
0 – 10	4,500,000	2,300,000	2,200,000
10 – 20	5,700,000	2,900,000	2,800,000
20 – 30	5,200,000	2,600,000	2,600,000
30 – 40	3,100,000	1,600,000	1,500,000
40 – 50	2,500,000	1,200,000	1,300,000
50 – 60	1,865,900	890,800	975,100
60 – 70	1,138,000	525,100	612,900
70 – 80	533,600	237,500	296,100
80 – 90	139,600	55,600	84,000
90 – 100	12,300	3,600	8,700

Source: World Population Review



Ancient Citadel of Aleppo

Syria at a Glance

Official Name	Syrian Arab Republic
Land Area	185,887 sq km
Capital	Damascus
Government	Presidential Republic
President (transitional period)	Ahmed Al-Sharaa
Population (2024)	24.7 Million
Population Density	139.5 per sq km
Population Growth	4%
Nationality	Syrians
GDP (2023)	$17.5 Billion
GDP Per Capita (2023)	$753.6
GDP Growth – Annual Change in % (2023)	-1.2%
Inflation – Consumer Prices – Annual Change in % (2023)	92.5%
Industries	Agriculture, Manufacturing, Services
Declaration of Independence	April 17, 1946
Official Language	Arabic
Dominant Religion	Islam
Currency	Syrian Pound
Time Zone	UTC+3
Calling Code	+963

Sources: The CIA World Factbook, World Bank & World Population Review

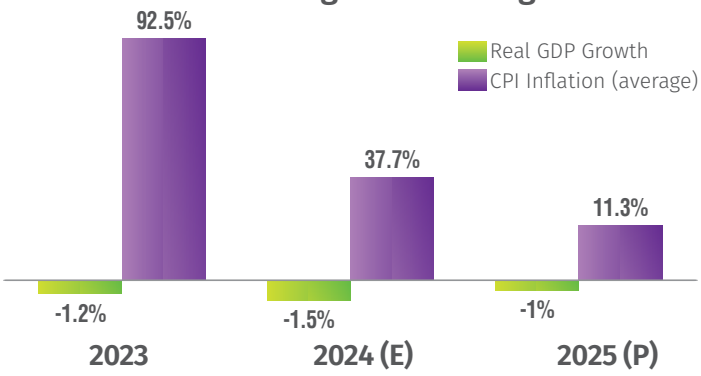
Economy

Syria's economy continues to struggle under the weight of prolonged conflict, international sanctions and infrastructural devastation. The World Bank has excluded forecasts for Syria beyond 2024 due to the high degree of uncertainty.

	2010	2023
Exports	$8.8 Billion	$1 Billion
Imports	$17.5 Billion	$3.2 Billion

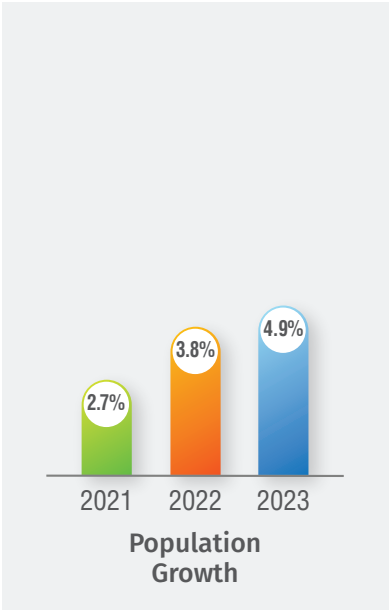
Source: Central Bank of Syria

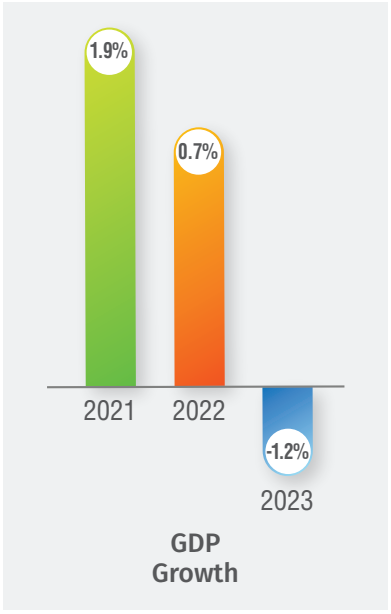
State of Economy Highlights – Annual Change in Percentage

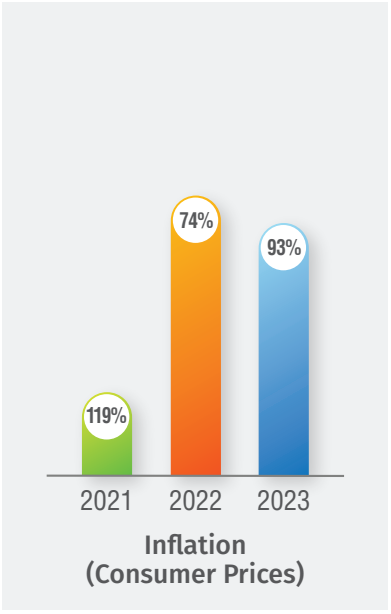


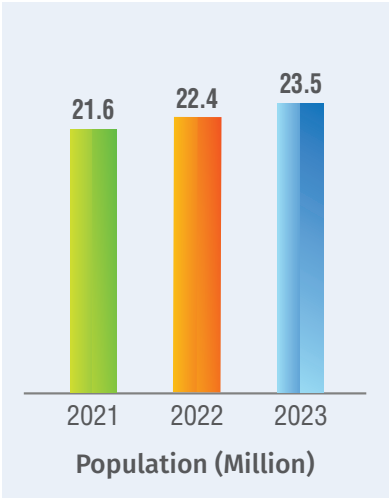
Source: World Bank
Footnote: E: Estimated P: Projected F: Forecasted

Key Macroeconomic Highlights













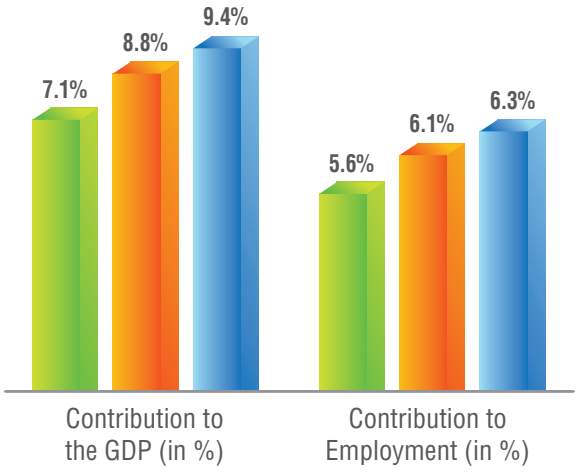
Sources: World Bank

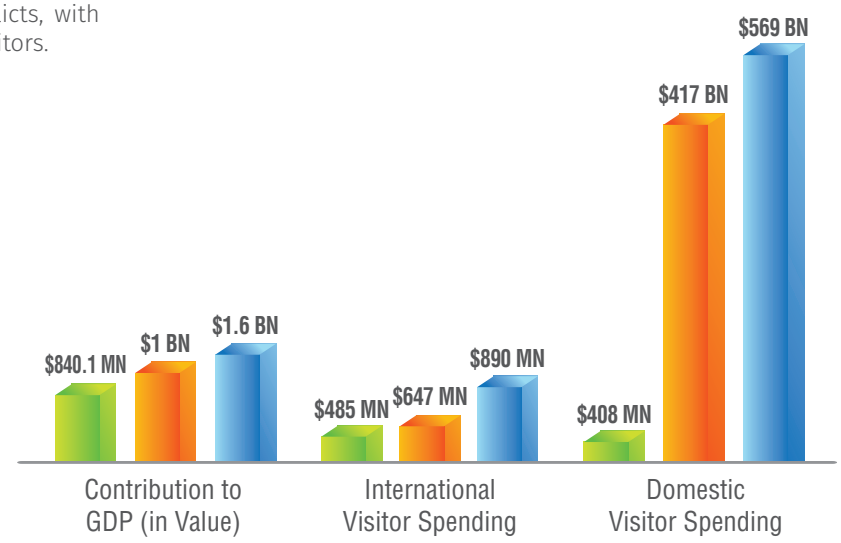


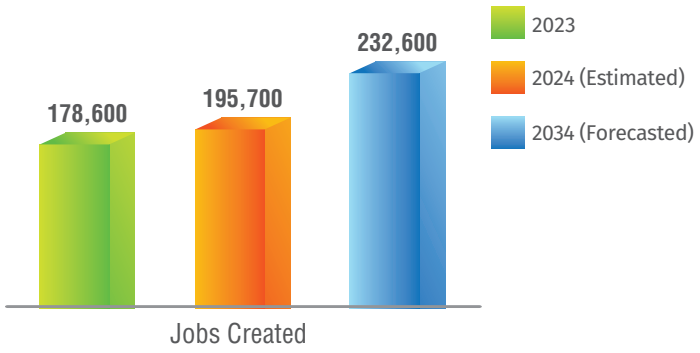
Ancient Palmyra, Syria

Tourism Sector

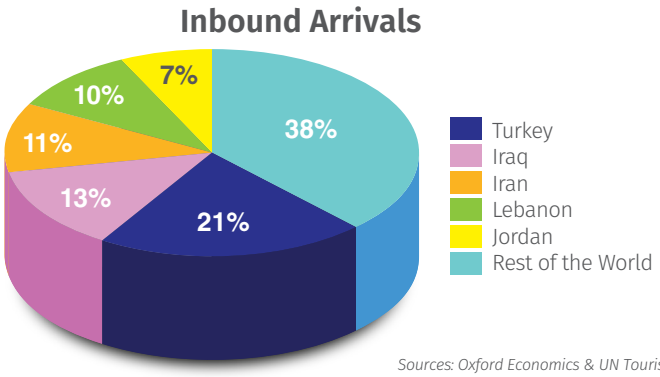
Once a significant contributor to Syria's economy, the tourism industry has been nearly obliterated by ongoing conflicts, with historical sites damaged and security risks deterring visitors.



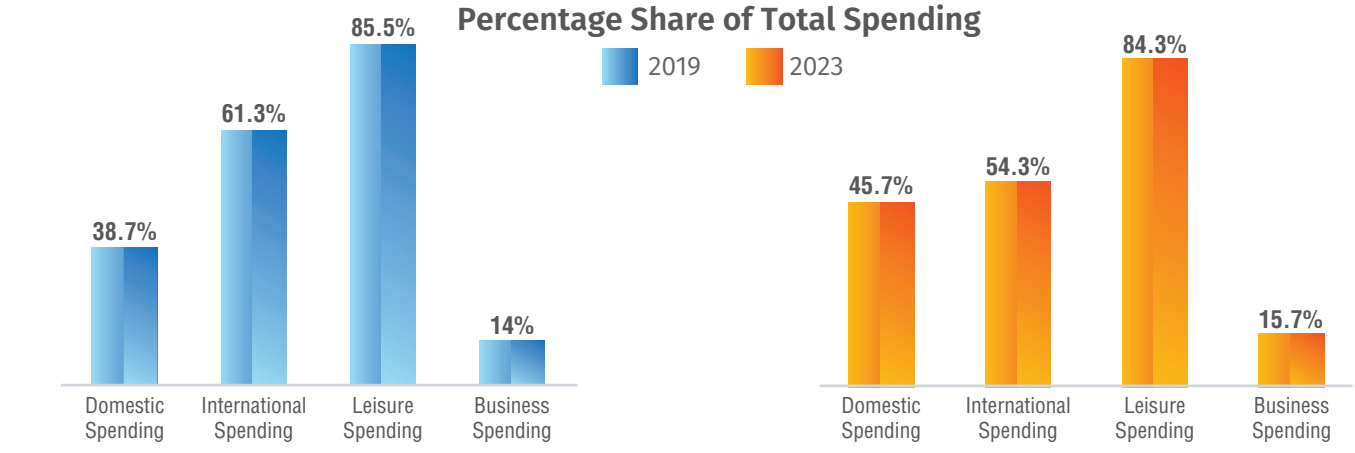




Source: World Travel & Tourism Council



Sources: Oxford Economics & UN Tourism



Source: World Travel & Tourism Council



Panoramic view of the Nimrod fortress, Syria

Key Leisure & Entertainment Operators

- Arwad Island
- Heroes Station
- Teatro Romano de Palmira



Arwad Island



Teatro Romano de Palmira

Leisure & Entertainment Industry – Lebanon, Palestine, Syria

The leisure & entertainment sector in Lebanon, Palestine and Syria are deeply influenced by the prevailing socio-political climate, with each region facing unique challenges and developments.

Lebanon's leisure and entertainment sector has been severely affected by recent conflicts and economic challenges. Cultural events and festivals, once a hallmark of the Lebanese society, stand halted leading to reduced domestic engagement and international tourism. The escalation of hostilities, particularly involving Hezbollah and Israeli forces, has led to infrastructure damage and a decline in tourism. For understanding, the World Bank has revised Lebanon's real GDP growth forecast from slight growth to a contraction of 6.6% in 2024, highlighting the economic toll on sectors like agriculture, manufacturing and tourism.

Meanwhile in Palestine in areas such as Bethlehem, the leisure and entertainment industry that is heavily reliant on religious tourism has faced downturns due to regional conflicts. For instance, Christmas celebrations in Bethlehem were notably subdued amid ongoing conflicts, significantly impacting the local economy that depends on pilgrimage and tourism, as reported by Associated Press. Local initiatives strive to sustain cultural heritage and community engagement, but challenges persist due to movement restrictions and economic instability.

The prolonged civil war has devastated Syria's leisure and entertainment infrastructure. Many cultural sites have been damaged or destroyed, and the ongoing conflict hampers efforts to revive the sector. Despite these challenges, some communities continue to celebrate cultural events, seeking normalcy amidst turmoil. However, large-scale leisure and entertainment activities remain limited due to security concerns and infrastructural constraints.

Outlook

In summation, Lebanon, Palestine and Syria face significant economic and tourism challenges, primarily due to ongoing conflicts and political instability. These three countries continue to grapple with severe economic contractions and a decimated tourism industry.

Cedars of Mount Lebanon



ASI

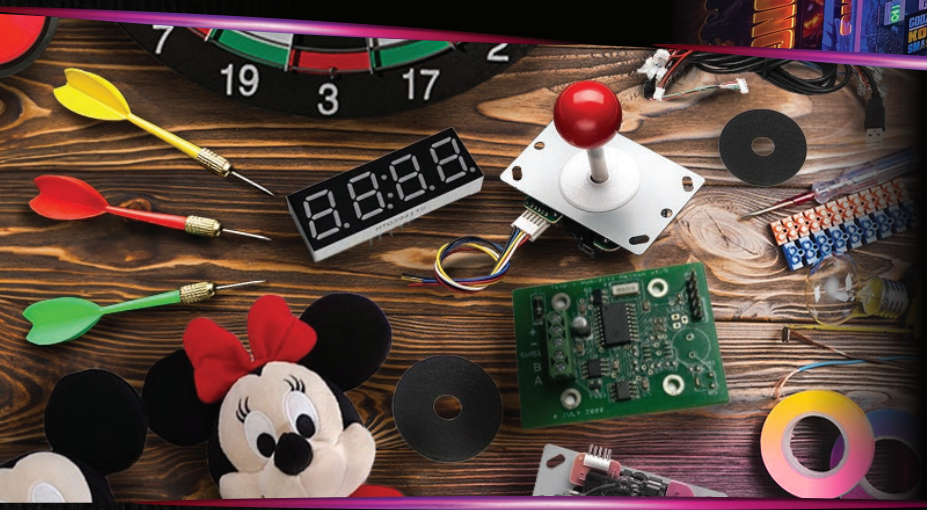


DESIGN
Spaces That Inspire Play!

We transform your space into an experiential venue that is functional and fun.

SUPPLY
All the Fun!

Access the best of all the arcade equipment and attractions from a single source.



SUPPORT
We've Got You Covered!

From parts to consumables, online support, and training, we add value to your operational efficiency.

DELIVERING EXCELLENCE SINCE 1999

99 % CUSTOMER RETENTION

1,900 SATISFIED CUSTOMERS

WINNER
THE BEST SUPPLIER OF THE YEAR
2024
MENALAC AWARDS

$975 MILLION WORTH OF EQUIP DELIVERED

5,400 FECs EQUIPPED

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مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي
Middle East and North Africa Leisure & Attractions Council

MENA LEISURE & ENTERTAINMENT INDUSTRY SURVEY

2024









MENA LEISURE & ENTERTAINMENT INDUSTRY SURVEY 2025

We are pleased to present the second edition of MENALAC's comprehensive survey assessing the performance of the leisure and entertainment (L&E) sector across the MENA region for the year 2024. This initiative continues to build on our efforts to enable the industry to promote data sharing, establish benchmark and analyse trends that are influencing the development of our industry. Our goal is to help operators make informed decision to drive their business.

All survey respondents received personalised email invitations linking to the web-based survey, supported by regular reminders and follow-ups. To ensure the integrity and confidentiality of the data, all responses were submitted directly to our audit partner, UHY James Advisory, which received only anonymised data. UHY conducted an independent analysis and converted the responses into a meaningful report.

We extend our sincere thanks to all the respondents and industry stakeholders who took the time to participate in the survey. Your contributions are invaluable, as reliable data remains the cornerstone of sustainable growth and innovation in the L&E sector.

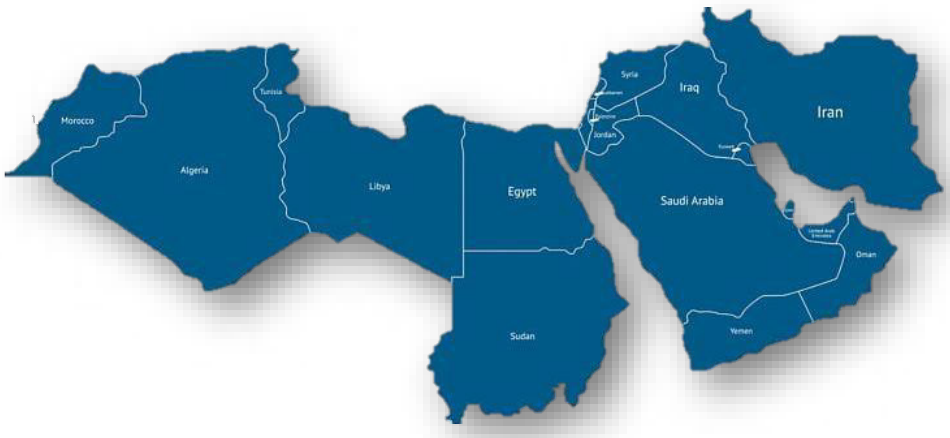
The majority of responses were received from operators within the Gulf Cooperation Council (GCC), representing 357 leisure facilities across the region.

The survey is based on respondents operating across 374 facilities and was conducted to measure the performance in 2024. The operators from major hub like KSA and UAE have 195 and 102 facilities, respectively.

To provide a holistic view of the sector, the survey covers five key functional areas: Operations, Finance, Marketing, Human Resources, and CEO/Senior Management. These insights aim to capture targeted and accurate data, both in terms of performance of the business in 2024 and forecast trends for 2025.

The survey report is expansive and measures many relevant trends that will be useful for operators to benchmark their operations against.

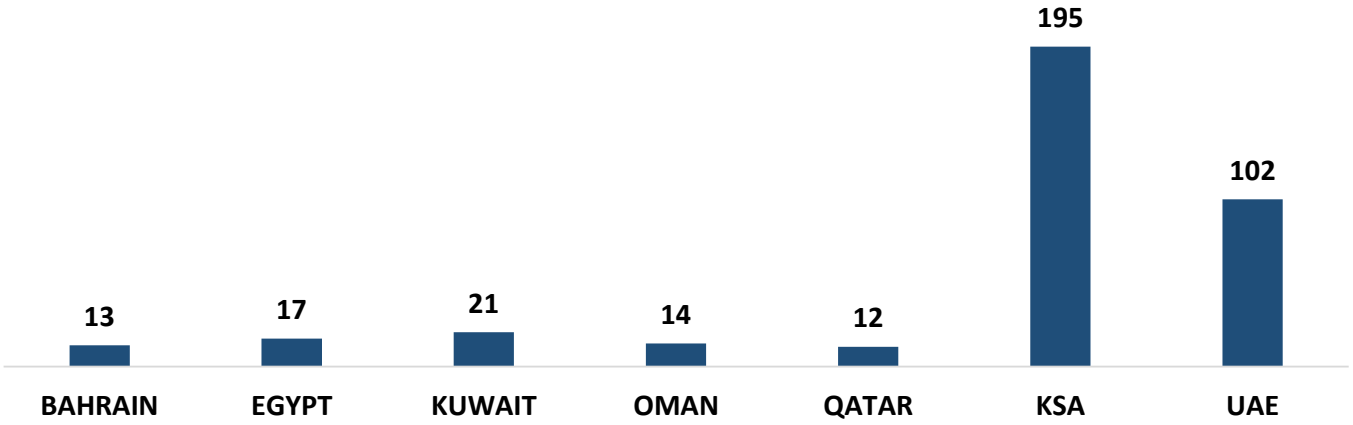
Countries covered in the survey are: Bahrain, Kuwait, Oman, Qatar, KSA & UAE (GCC) & Egypt.



SURVEY RESPONSES PER COUNTRY

374 Leisure & Entertainment facilities operating across MENA region participated in the survey

RESPONDENTS PER COUNTRY OF OPERATION



95% of the survey respondents were based out of GCC

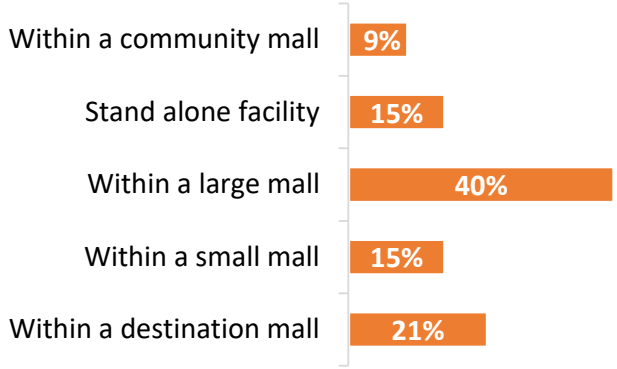
RESPONDENTS PER SECTOR

Country of Operations	FECs & Participatory Play Areas	Theme Park	Water Park	Grand Total
BAHRAIN	13			**13**
EGYPT	17			**17**
KUWAIT	21			**21**
OMAN	14			**14**
QATAR	11	1		**12**
KSA	193		2	**195**
UAE	99	2	1	**102**
Grand Total	**368**	**3**	**3**	**374**

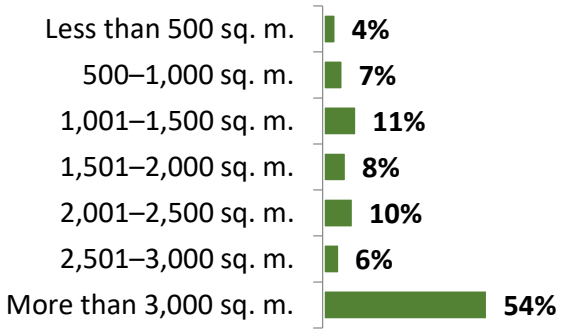
98% of the respondents operate FECs

LOCATION TYPES, SIZES & TYPICAL ATTRACTION MIX

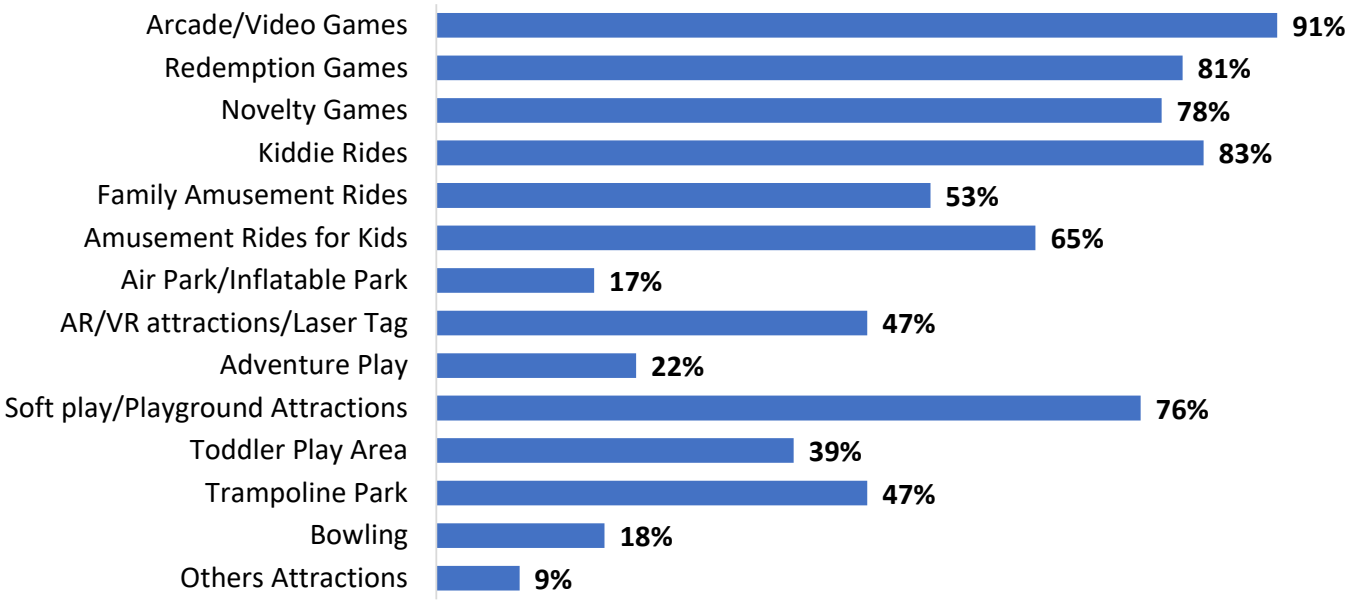
WHERE ARE SUCH FECs & PLAY AREAS LOCATED?



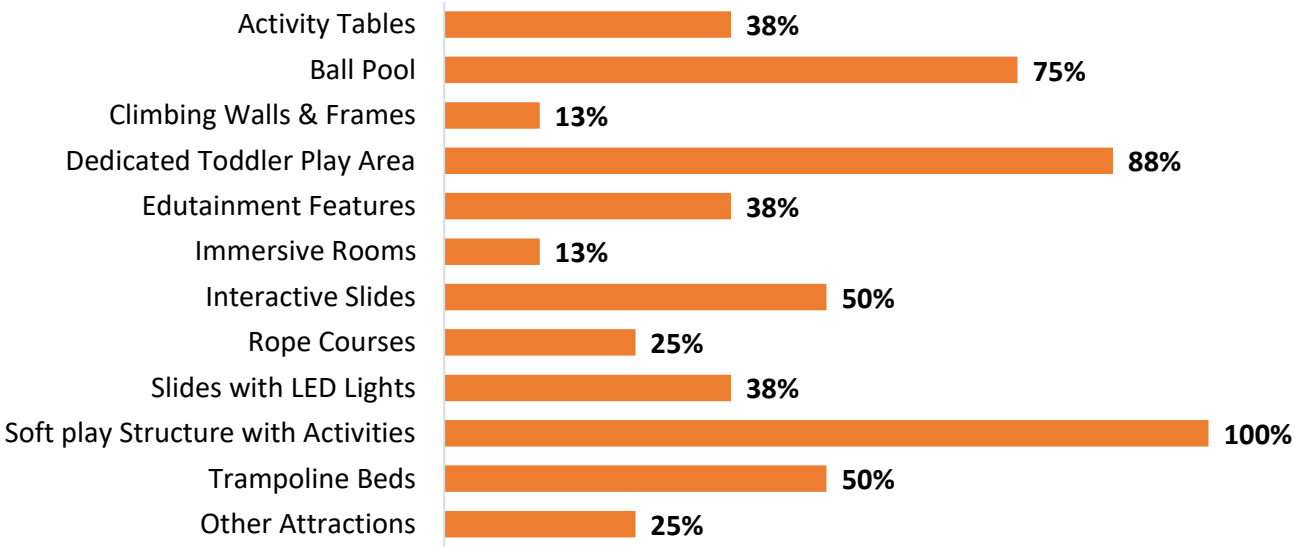
AVERAGE SIZE OF FECs & PLAY AREAS



ATTRACTION MIX FOR FECs



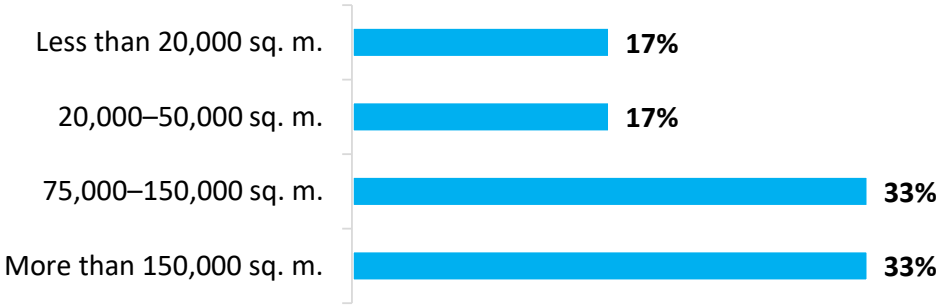
ATTRACTION MIX FOR PARTICIPATORY PLAY AREAS



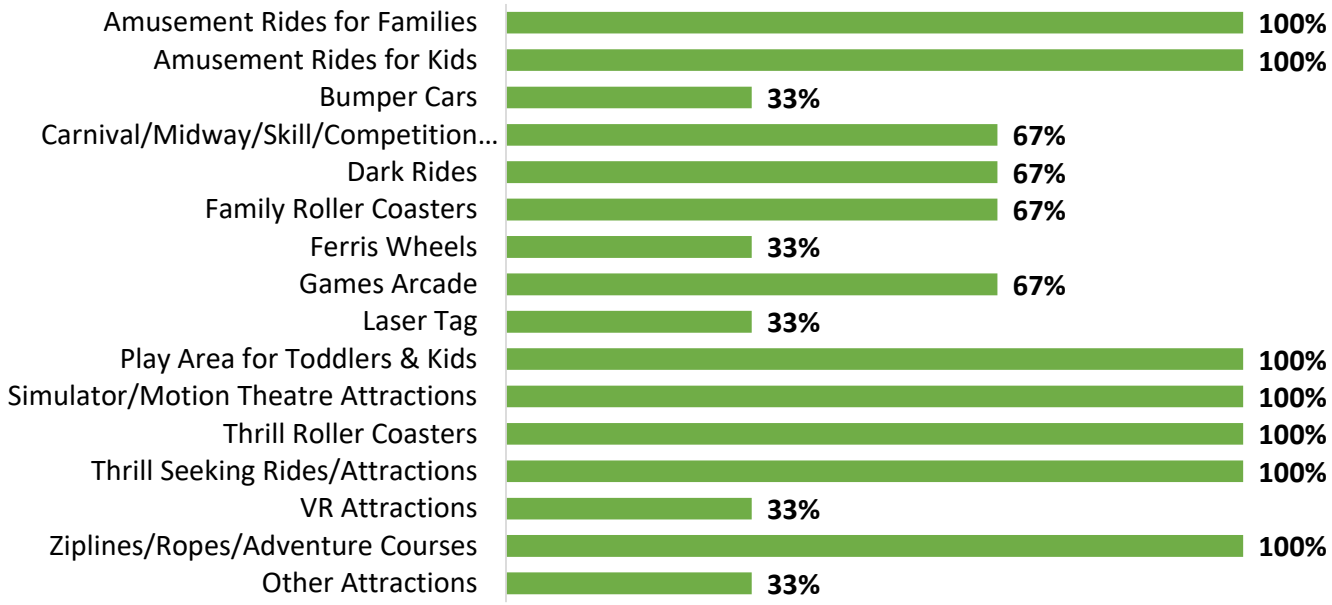
NOTE FOR FECs:
Kiddie rides includes Small 1-player rides for kids; Amusement Rides for Kids includes carousels, mini-flight, etc.; Adventure Play includes Climbing walls/Ninja Courses/Rope Courses; Bowling includes Full size OR Mini Bowling - Number of lanes; Other attractions includes Go-karts, Mini-Golf among others

LOCATION SIZES AND TYPICAL ATTRACTION MIX

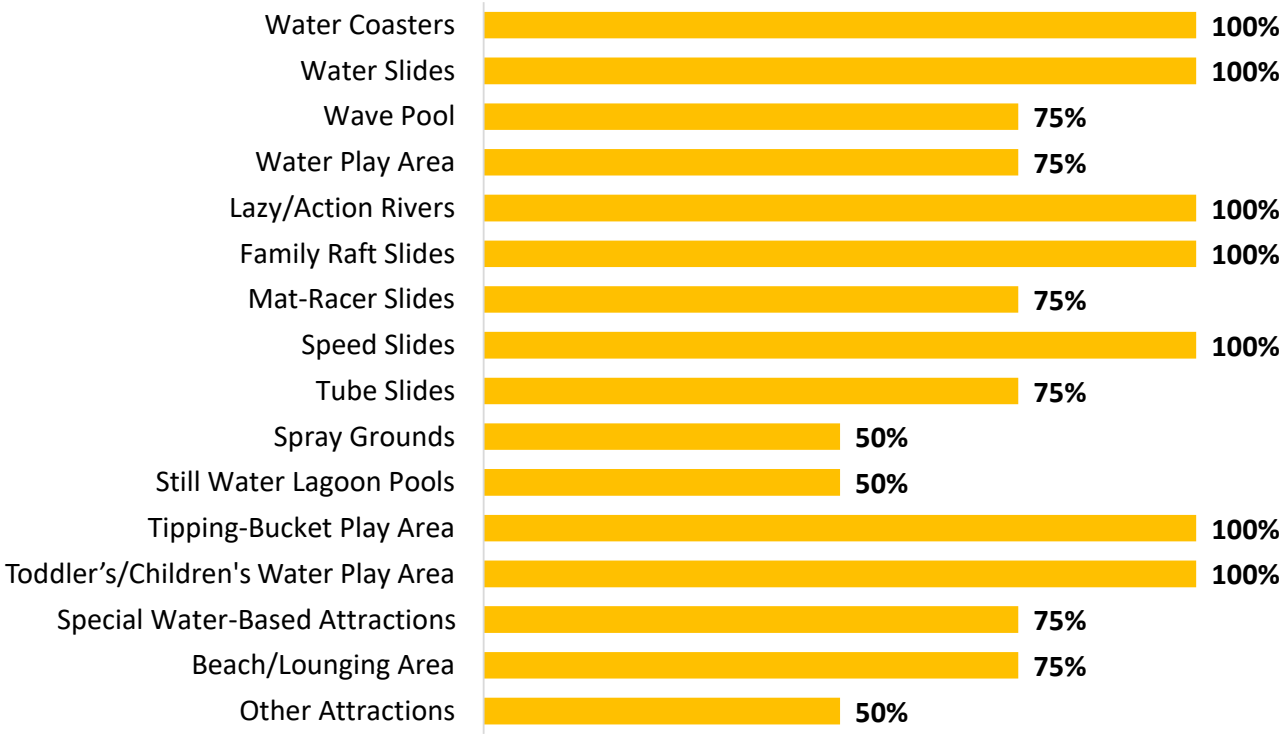
AVERAGE SIZE OF THEME PARKS & WATER PARKS



ATTRACTION MIX FOR THEME PARKS

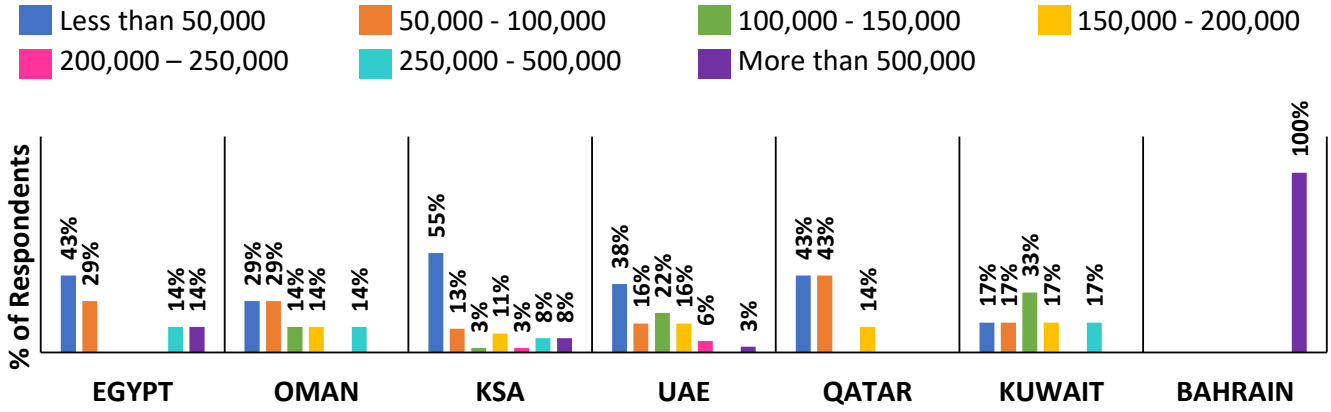


ATTRACTION MIX FOR WATER PARKS



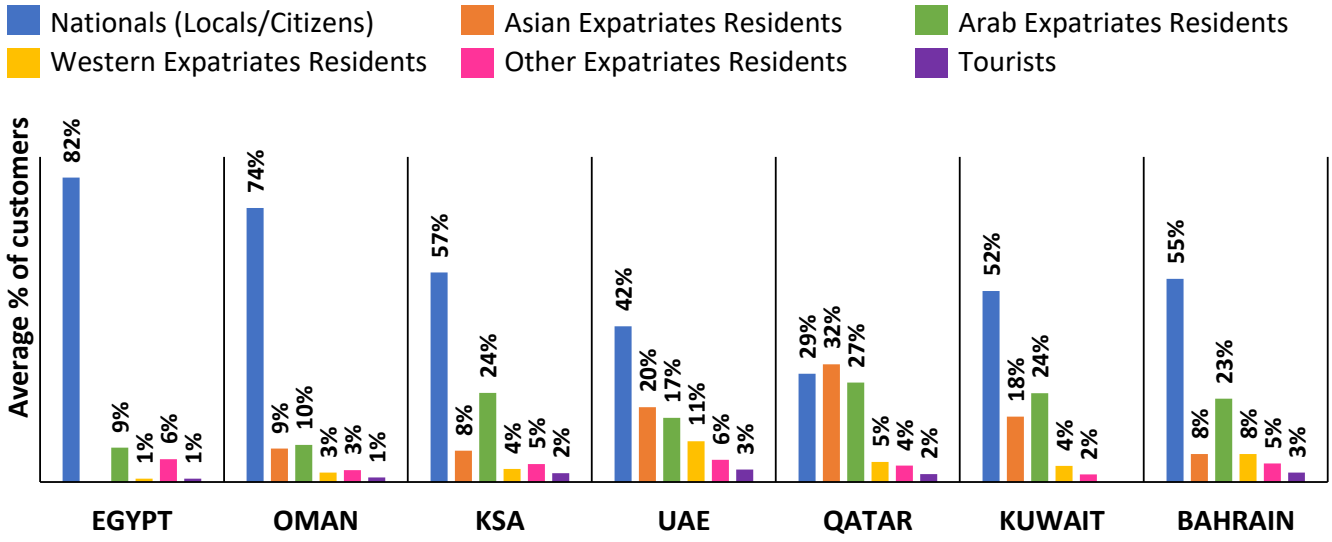
FECs & PARTICIPATORY PLAY AREAS

AVERAGE ANNUAL VISITATIONS/CUSTOMER TRANSACTIONS IN 2024



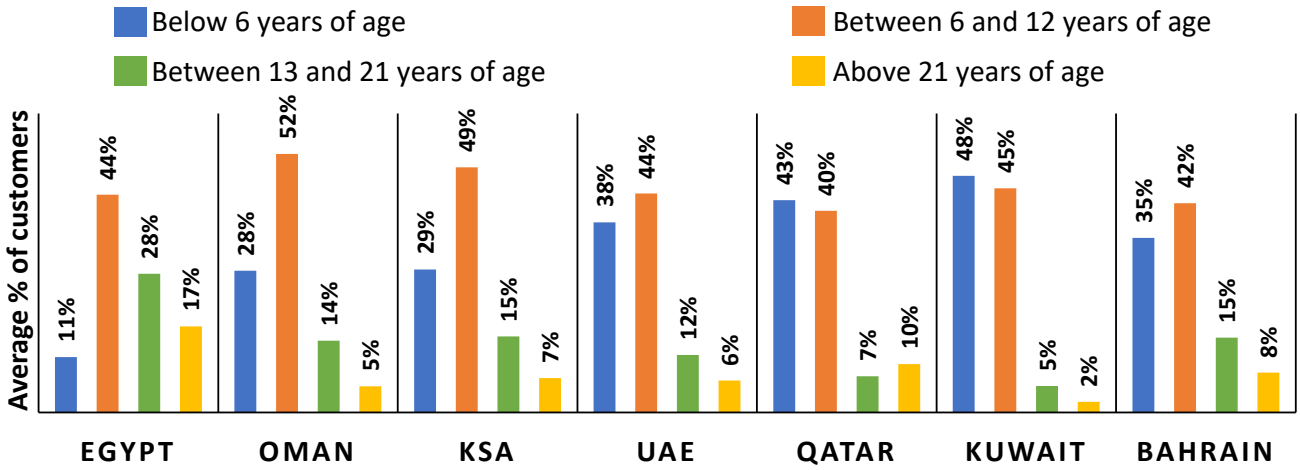
Purely on the basis of number of responses received, the data from KSA & UAE accurately represents the annual customer transactions trends in the rest of MENA region too.

NATIONALITY OF VISITING CUSTOMERS



Nationals form the largest customer base for FECs across most countries, with notable diversity in demographics seen in UAE, Qatar and Bahrain.

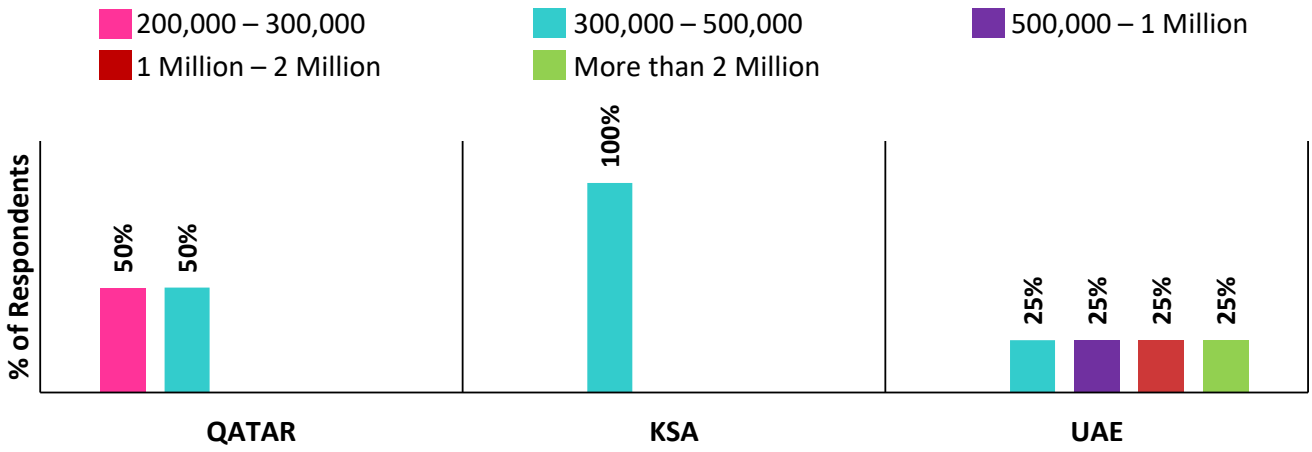
VISITORS MIX BY AGE GROUP



Children aged 6–12 years form the largest visitor segment at FECs & Participatory Play Areas across all countries, followed by those under 6—reinforcing their appeal to young families.

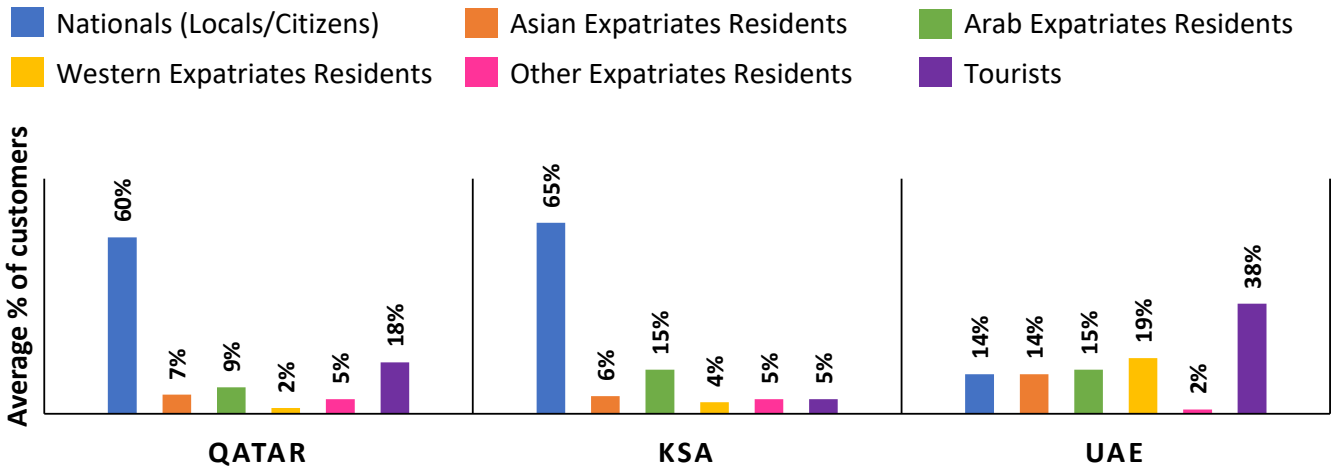
THEME PARKS & WATER PARKS

AVERAGE ANNUAL VISITATIONS/CUSTOMER TRANSACTIONS IN 2024



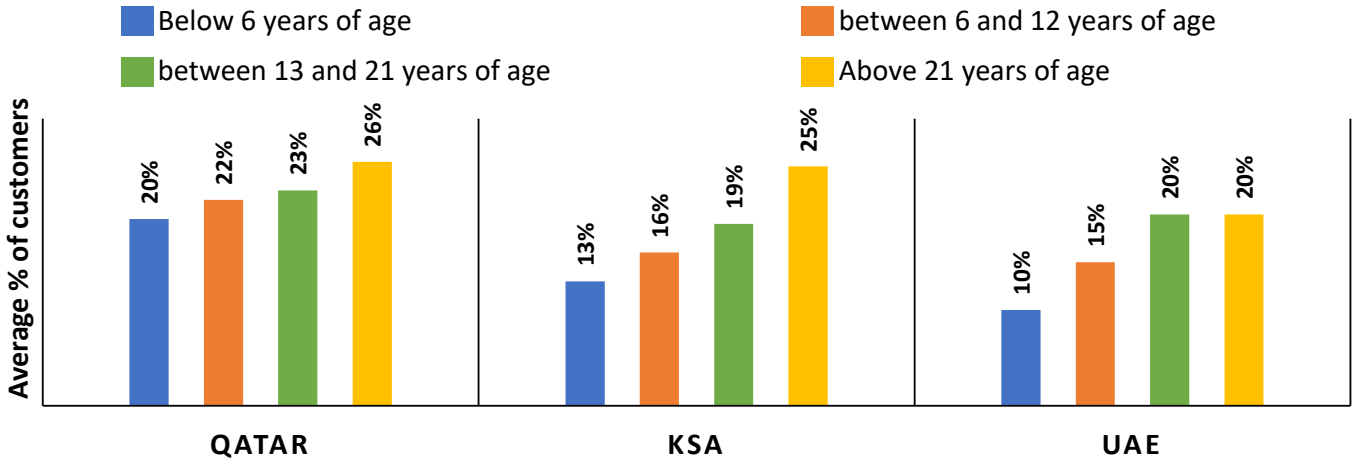
In 2024, Theme Parks and Water Parks in KSA report consistent annual visitation levels between 300,000–500,000.

NATIONALITY OF VISITING CUSTOMERS



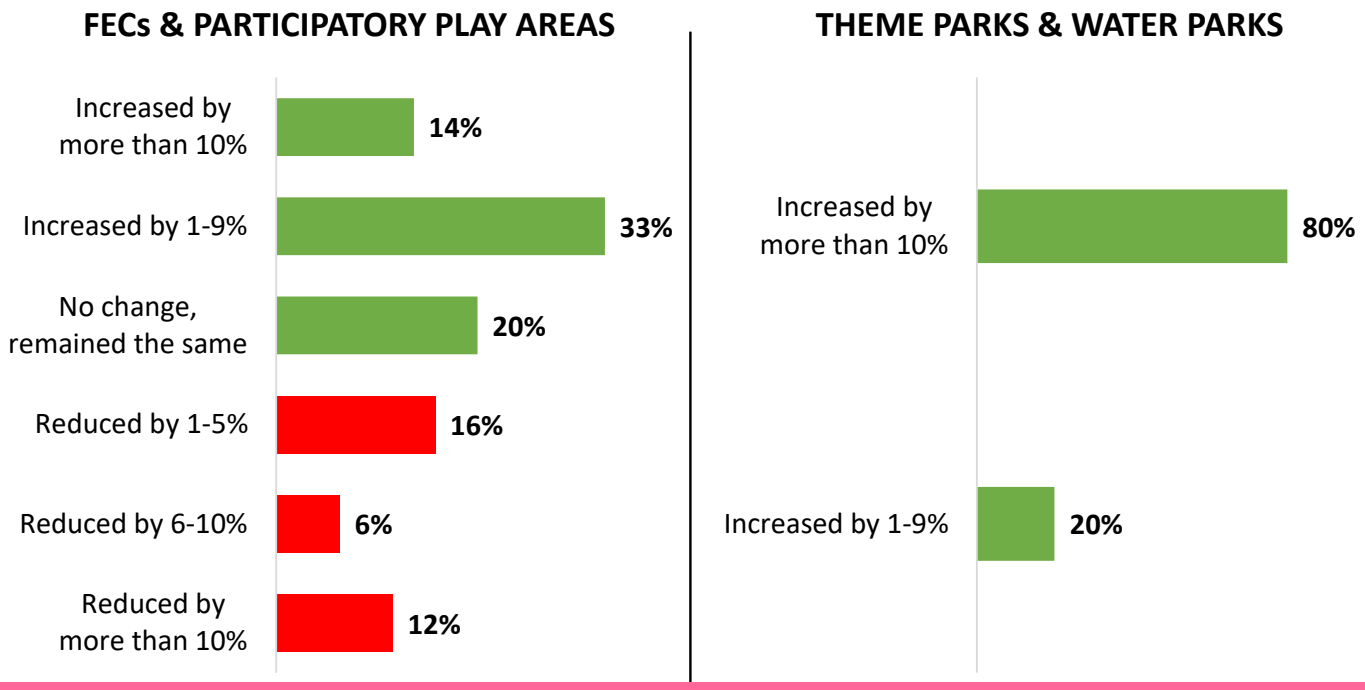
Nationals dominate Theme Park and Water Park visitation in Qatar and KSA, while the UAE sees the highest tourist turnout at 38%, highlighting its global appeal.

VISITORS MIX BY AGE GROUP



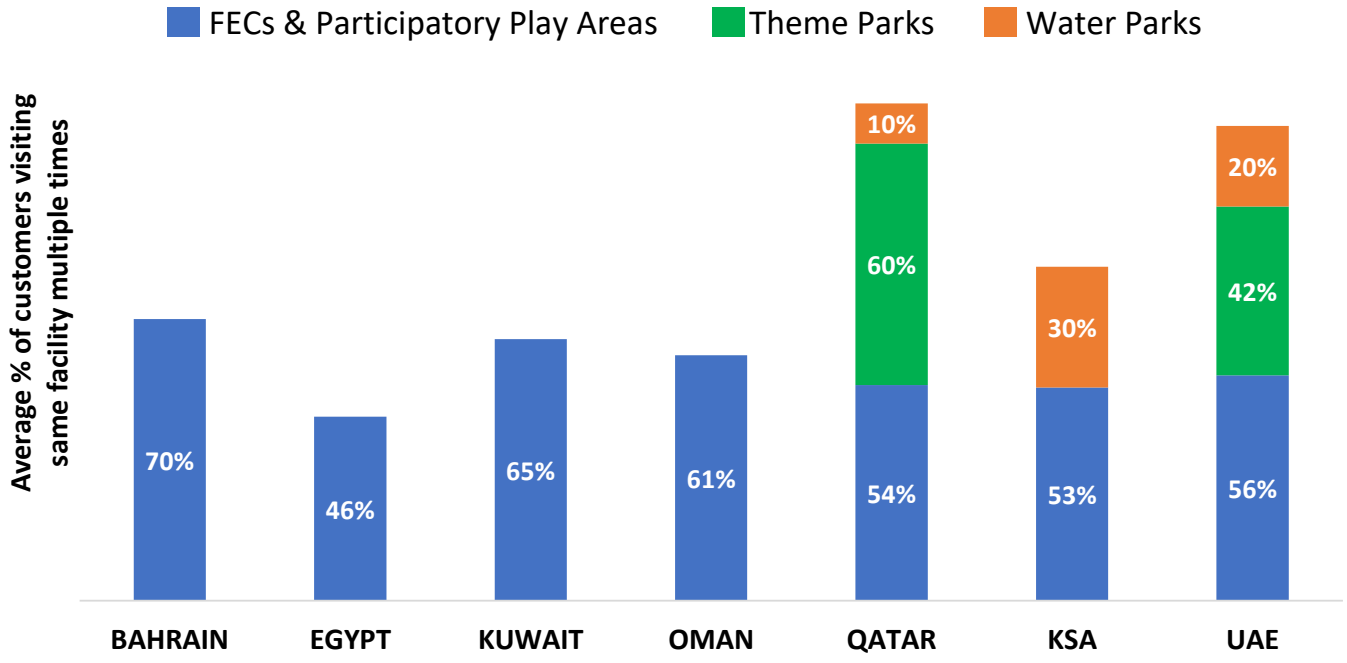
Theme Parks & Water Parks in general attract a higher proportion of visitors aged 21+, while Qatar's Theme Parks also see greater attendance from younger age groups.

GROWTH IN VISITOR ATTENDANCE/CUSTOMER TRANSACTIONS 2024 vs 2023



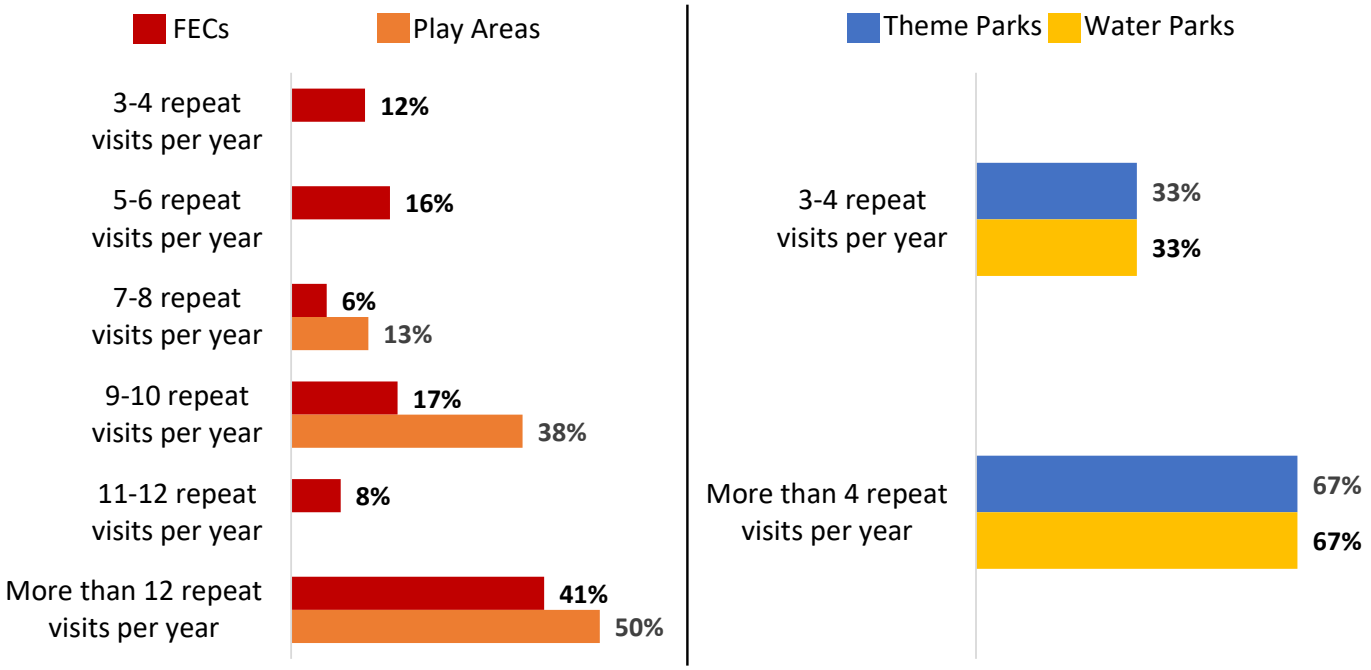
47% of the FECs & Participatory Play Areas reported an increase in customer transactions, whilst 53% have witnessed no change or a reduction in attendance in 2024 over 2023. In contrast, Theme Parks & Water Parks have reported an increase in attendance in 2024.

REPEAT VISITATIONS



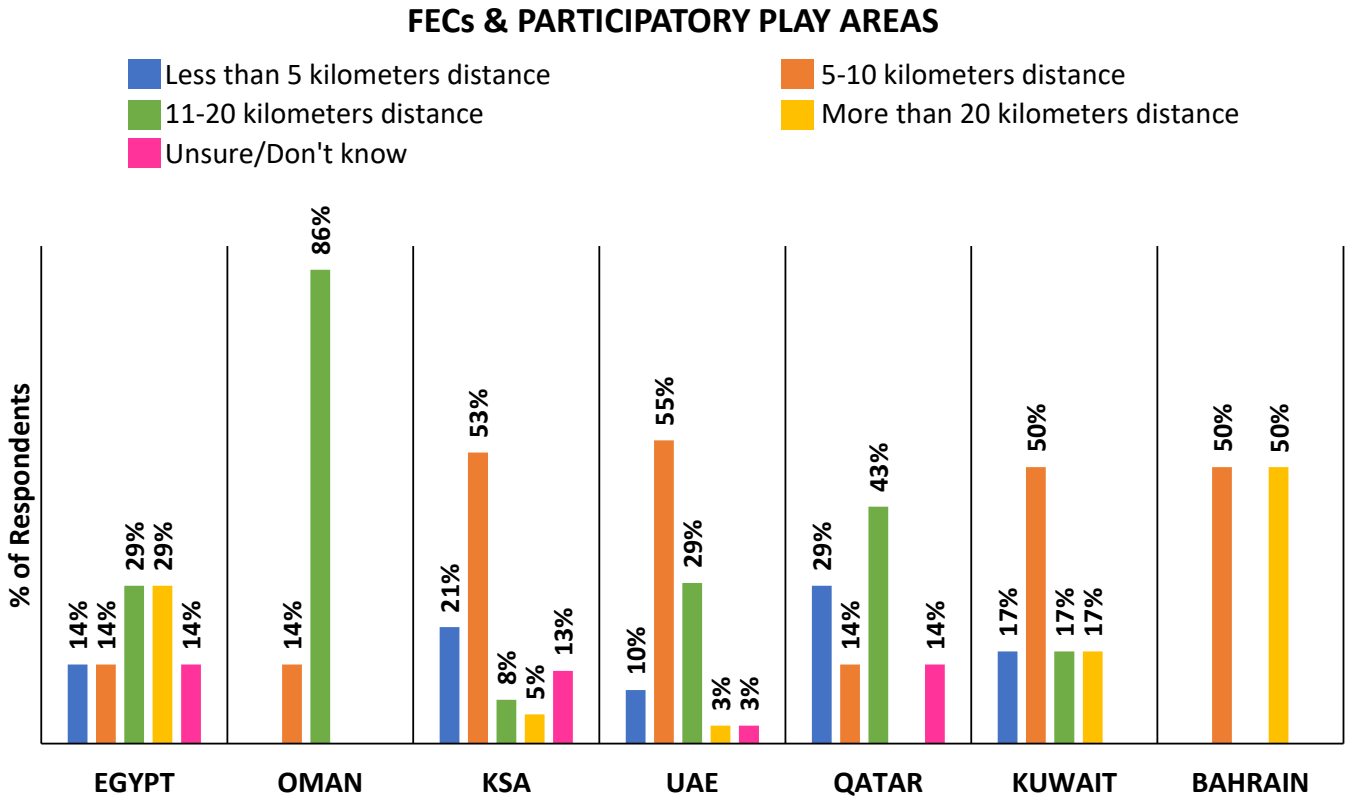
FECs & Participatory Play Areas across the region enjoyed a high level of repeat visits in 2024, with facilities in Bahrain, Kuwait and UAE leading in the number of repeat visit. Meanwhile, Qatar and KSA reported the highest percentage of repeat visits for their Theme Parks & Water Parks, respectively.

NUMBER OF REPEAT VISITS BY SAME CUSTOMER IN 2024



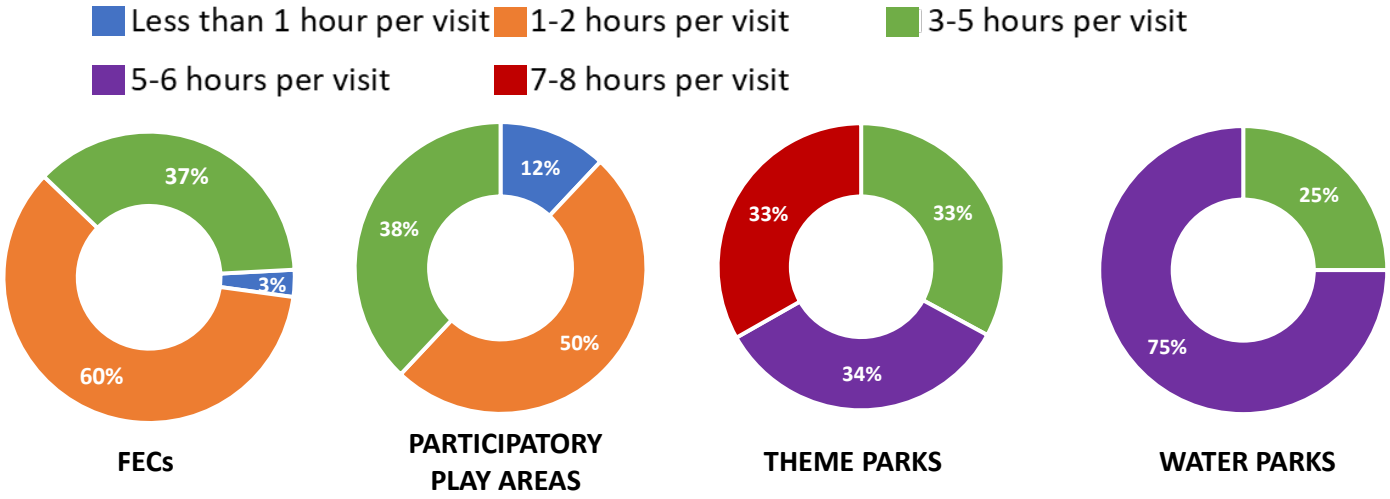
FECs & Participatory Play Areas show strong repeat visitation in 2024, reflecting a highly engaged user base, while Theme Parks & Water Parks report a notably higher frequency of more than four visits per year.

VISITOR DATA TREND BY TRAVEL DISTANCE



Majority of FEC visitors in Oman & Qatar travel 11–20 km, while UAE & KSA see most footfall from visitors within a 5–10 km radius, indicating strong neighborhood-based access.

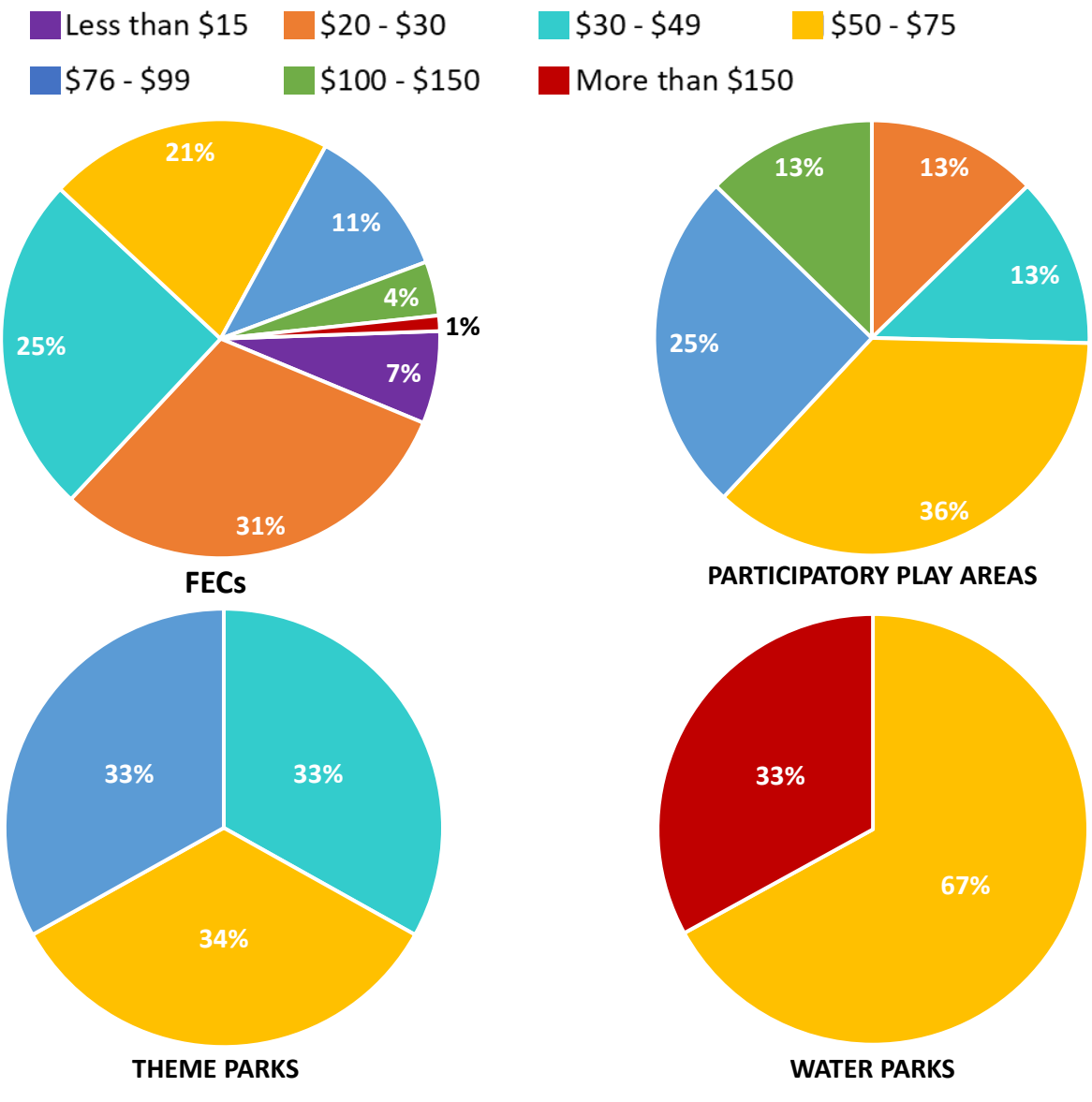
AVERAGE CUSTOMER DWELL TIME PER VISIT



FECs | PARTICIPATORY PLAY AREAS | THEME PARKS | WATER PARKS

More than 50% of the respondents report the average dwell time of 1-2 hours/visit for FECs & Participatory Play Areas. 56% of the FEC Operators indicated the average spend/transaction as $20-$49 during the 2 hour dwell time, whilst 51% of Participatory Play Area respondents reported a higher average spend/transaction of $30–$75 for the same 2 hour dwell time.

AVERAGE SPEND PER TRANSACTION



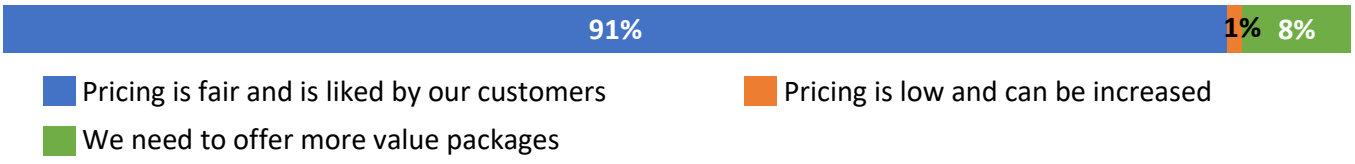
FECs | PARTICIPATORY PLAY AREAS | THEME PARKS | WATER PARKS

AVERAGE PRICE PER PLAY - FECs

TYPE OF ACTIVITY	AVERAGE PRICE PER PLAY		
	KSA	UAE	Rest of MENA
Air Park/Inflatable Park (per hour)	$7 - $8	$9 - $10	$5 - $7
AR/VR Games	$7 - $8	$5 - $6	$3 - $4
Arcade/Video Games (non-redemption)	$3 - $4	$3 - $4	Less than $3
Attractions/Rides	$5 - $6	$5 - $6	Less than $3
Bowling (per person per game)	$11 - $12	$7 - $8	$3 - $4
Climbing walls, Adventure Play, Ninja & Rope Courses	$11 - $12	$11 - $12	$14 - $15
Go-Karts (per session)	$11 - $12	More than $15	-
Miniature Golf (per session)	$11 - $12	$12 - $17	-
Redemption & Novelty (Games with Pay-out)	$5 - $6	$3 - $4	Less than $3
Soft play/Toddler Play Area (per hour)	$11 - $12	$11 - $12	$11 - $12
Trampoline Park (per hour)	$11 - $12	$11 - $12	$11 - $12
Others Attractions	$7 - $8	$5 - $6	$13 - $14

NOTE: Rest of MENA includes Bahrain, Egypt, Kuwait, Oman, Qatar

OPERATORS' OPINION ON THEIR FEC PRICING POLICY



ADOPTION OF DYNAMIC PRICING BY FECs

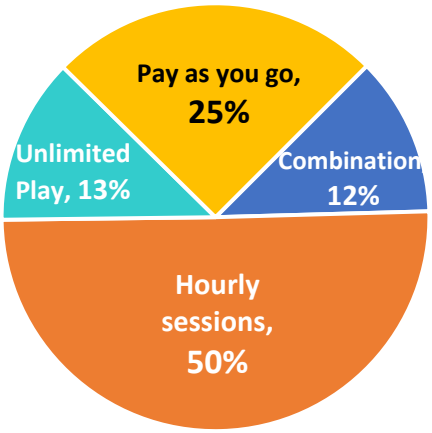




Majority of FEC respondents believe that their pricing is fair and well-received by customers.

PRICING AND TICKETING POLICY – PARTICIPATORY PLAY AREAS

MOST PREFERRED TICKETING POLICY



NOTE
**Hourly pricing - pay to play by hour or timed sessions*
**Pay as you go - pay per activity/attraction*
**One Entry Fee - all attractions included unlimited play*

AVERAGE PRICE PER PLAY - PARTICIPATORY PLAY AREAS

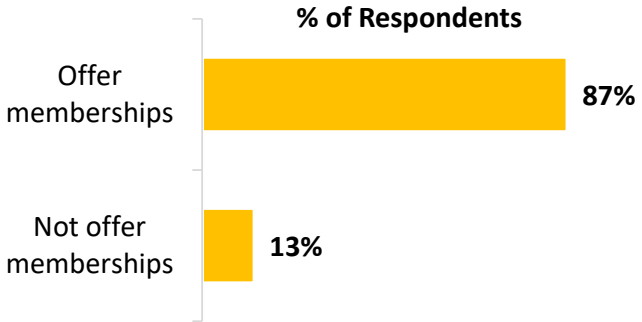
Up to 2 hour sessions (all attractions included)	More than $20
Adventure Play Area /Rope Courses (per session)	More than $20
Inflatable/Inflatable Air Park (per session)	More than $15
One hour session (all attractions included)	$11 - $12
Play Area per hour/session	$11 - $12
Toddler Play Area per hour/session	More than $15
Trampoline Park per session	$9 - $10
Others	$14 - $15

MOST POPULAR PURCHASE SESSIONS

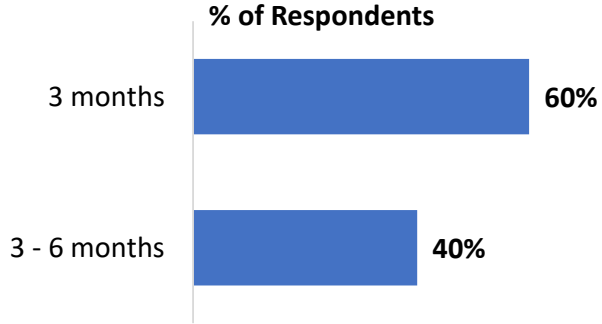


Hourly pricing is the most preferred model at Participatory Play Areas, with 2 hour purchase sessions most preferred among visitors.

MEMBERSHIPS AT PLAY AREAS



MOST POPULAR MEMBERSHIP PLAN

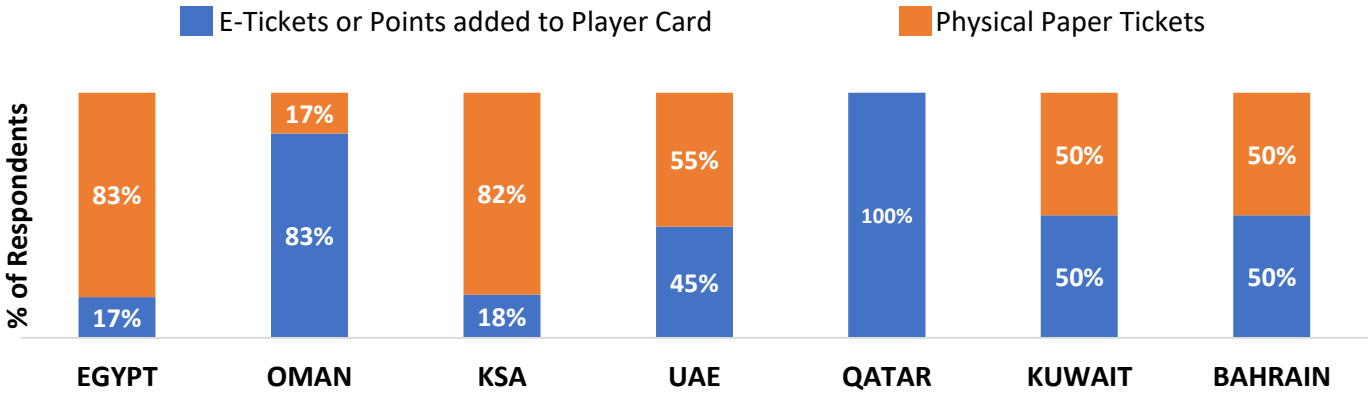




87% of Participatory Play Areas offer memberships, with 3-month membership plan being more popular. Respondents confirmed that membership plans drives repeat visits as well as customer retention.

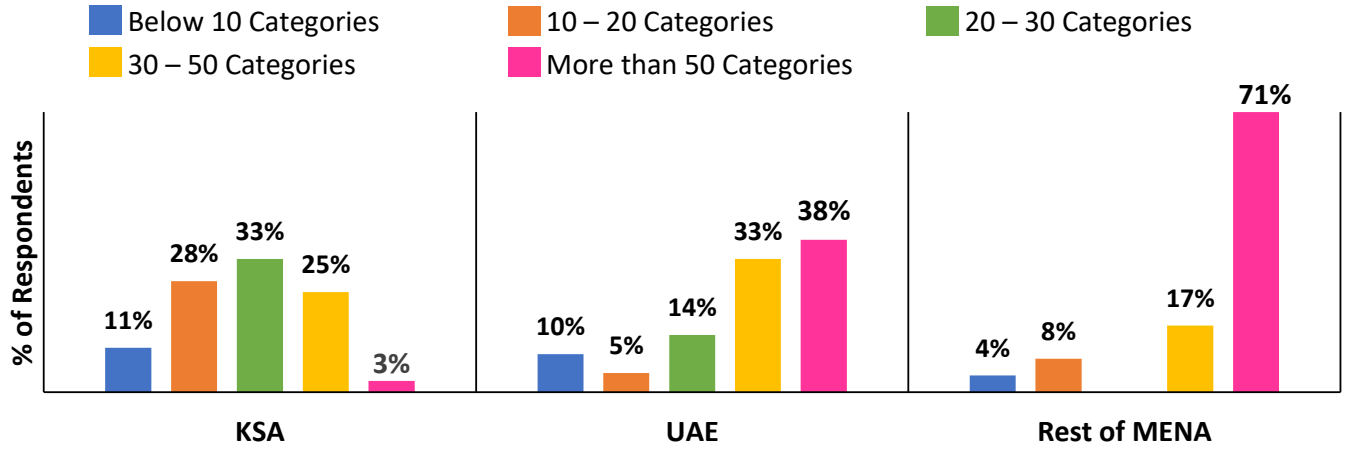
FEC – REDEMPTION OPERATIONS BENCHMARK

MOST PREFERRED TICKET METHOD



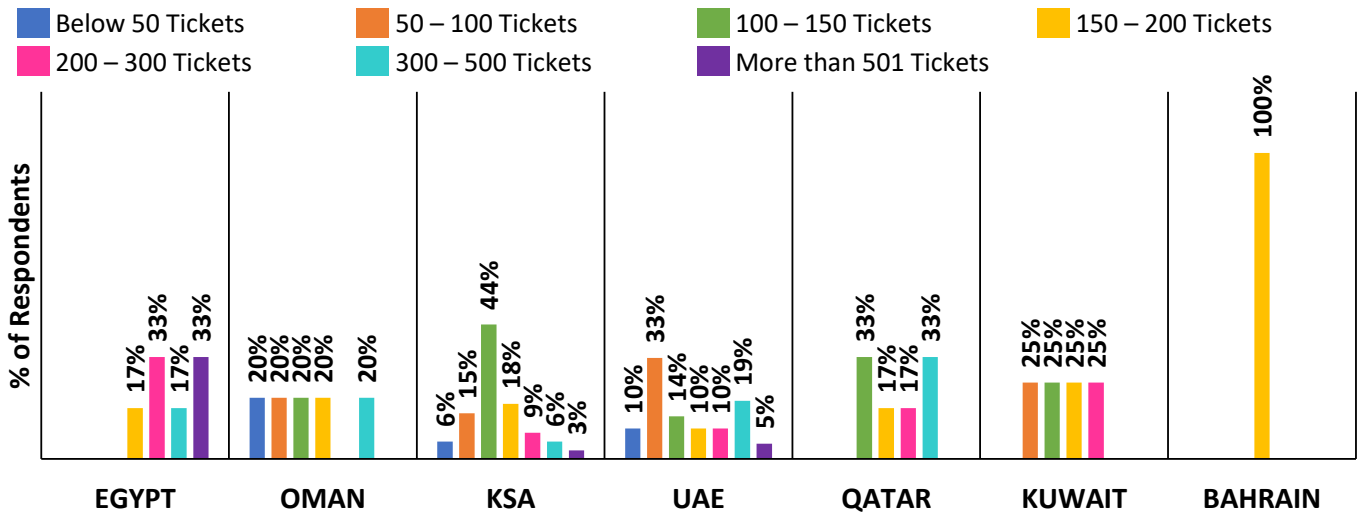
Based on responses received for this benchmark survey, Physical paper tickets are still the preferred option for operators & players in Egypt, KSA & UAE.

NUMBER OF REDEMPTION PRIZE CATEGORIES OFFERED



Most operations in the UAE and the rest of MENA offer more than 50 redemption prize categories, reflecting a strong focus on variety of prizes offered for redemption.

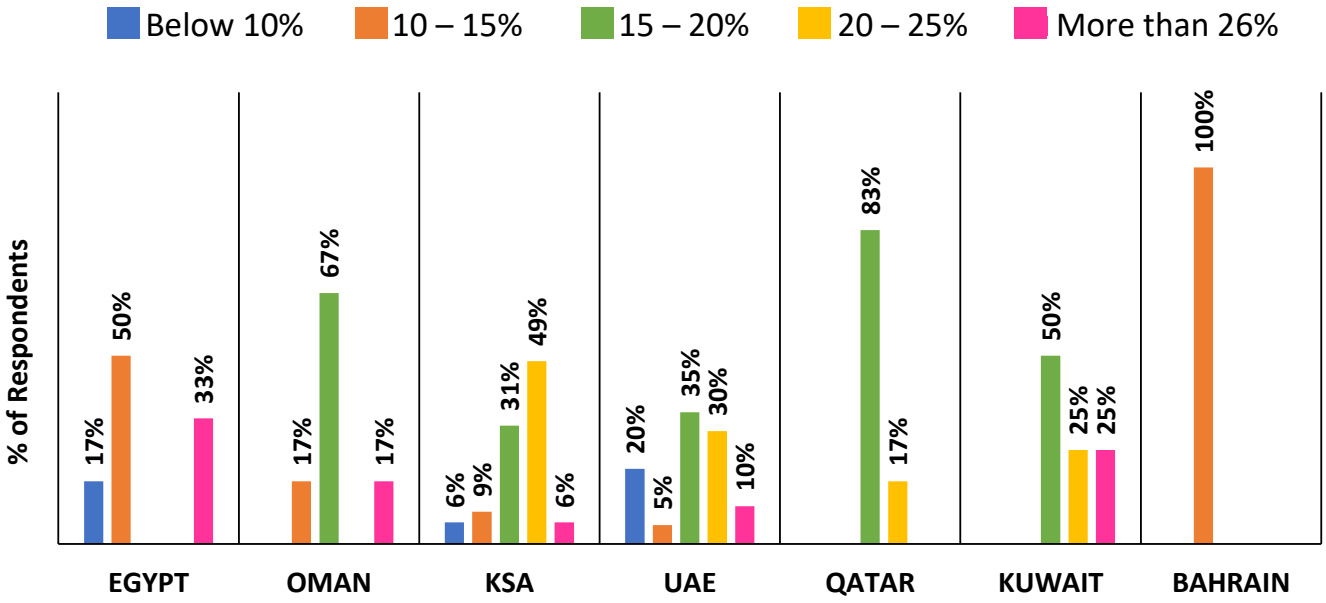
MOST REDEEMED TICKET CATEGORY



The most redeemed ticket category across MENA falls in the 100–150 tickets range (28% of respondents), alluding to the fact that operators need to have many attractive prize options for this band of tickets to ensure happy customers.

FEC - REDEMPTION OPERATIONS BENCHMARKS

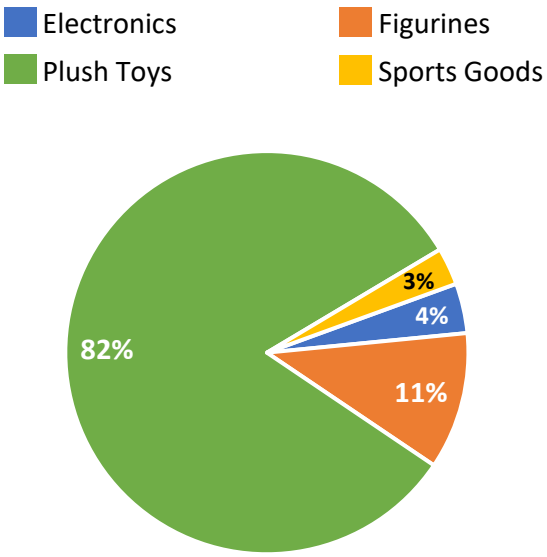
AVERAGE PAY-OUT RATIO



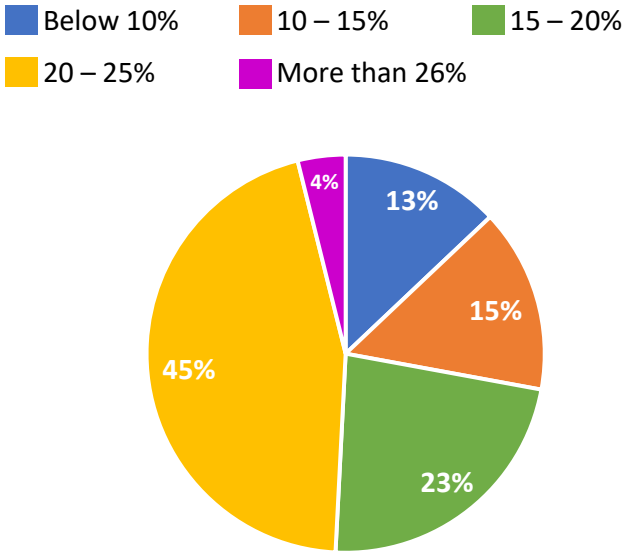
The average pay-out ratio for Redemption Games across MENA falls between 15%–20% (37% of respondents), followed by 20%–25% (32% of respondents).
As per industry experts, this compares well to the global benchmark of 18%-22% ticket payout.

FEC – NOVELTY OPERATIONS BENCHMARK

MOST POPULAR NOVELTY PRIZES



TYPICAL PAYOUT PERCENTAGE

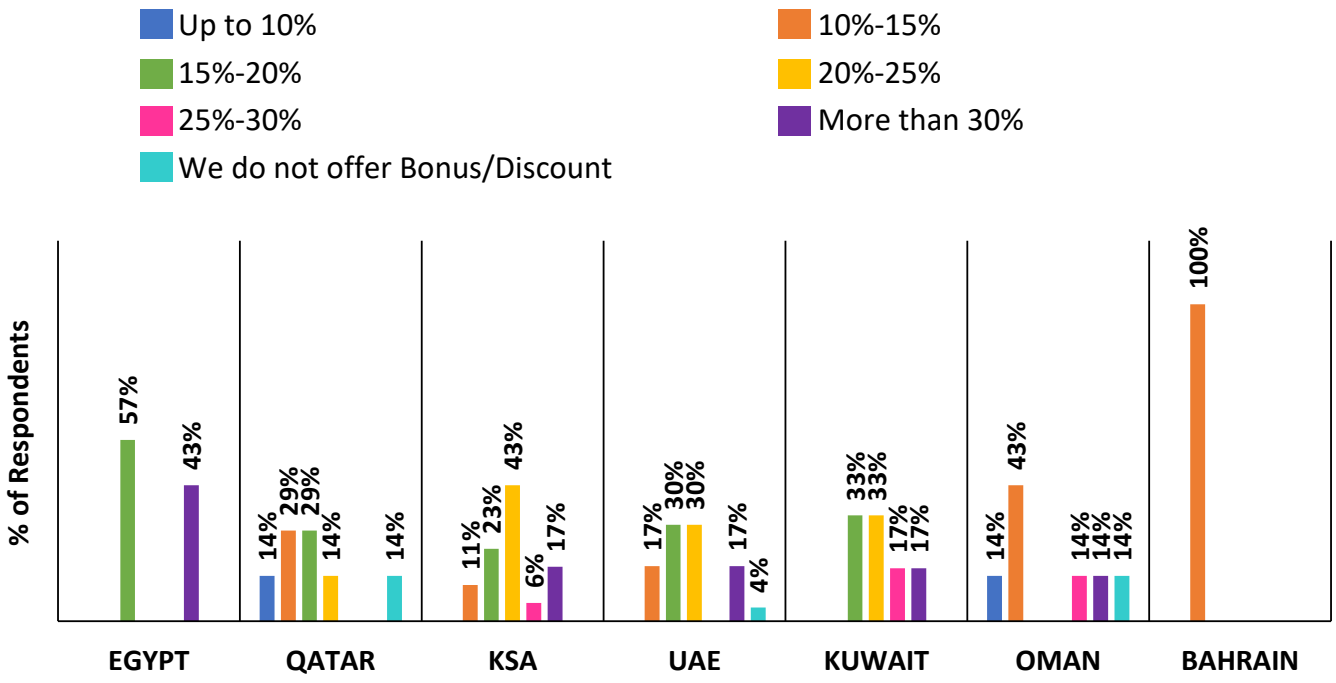


NOTE
**Electronics includes phones, tablets, power banks, etc.*
**Plush Toys also includes Squishy & LOL*
**Figurines also includes Funko Pop or Similar*
**Sports Goods include Football/Basketballs*

Across MENA, Plush & Squishies are preferred novelty merchandise.
Figurines are popular in KSA and Electronics are popular in Kuwait & Egypt.
51% of the respondents offer a payout below 20%.

FEC - BONUS CREDITS or DISCOUNTS OFFERED ON GAME CARD PURCHASES

BONUS CREDITS OR DISCOUNTS OFFERED ON CARD PURCHASE VALUE



95% of all respondents offer Bonus Credits against game card purchase value and affirm that such Bonus Credits are popular amongst their customers.

4% of the operators in the UAE do not offer any Bonus Credits or Discounts.

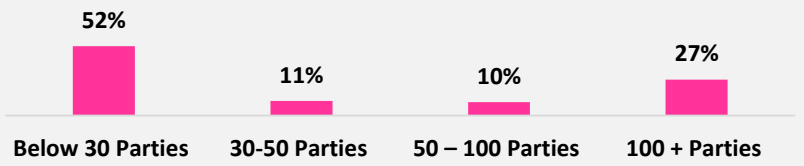
22% of the operators offer more than 30% as Bonus Credit.
30% of the operators offer up to 20%-25% as Bonus Credit and
34% of the operators offer up to 15%-20% as Bonus Credits.



BIRTHDAY PARTIES OPERATIONS TRENDS



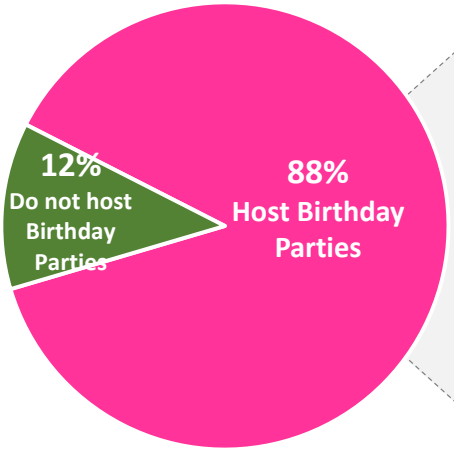
NUMBER OF BIRTHDAY PARTIES HOSTED PER YEAR - FEC



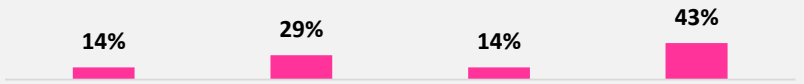
NUMBER OF BIRTHDAY PARTY ROOMS PER OPERATION

More than one party rooms - 33% of respondents

One party room - 67% of respondents



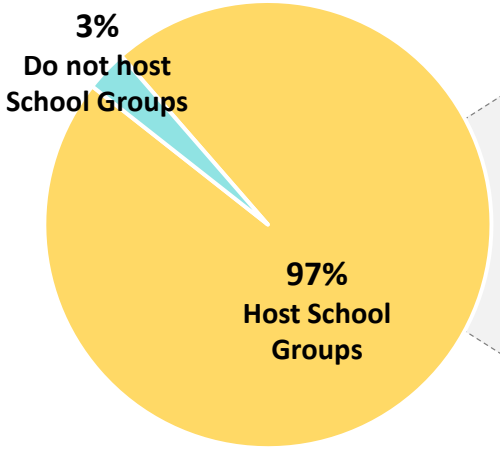
NUMBER OF BIRTHDAY PARTIES HOSTED PER YEAR – PARTICIPATORY PLAY AREAS



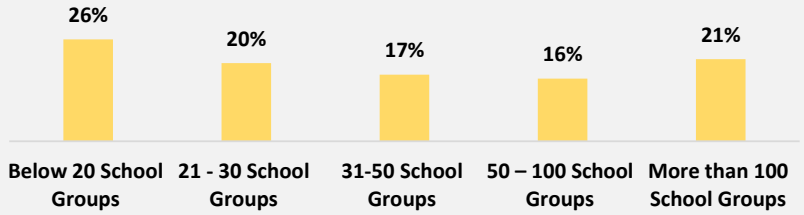
NUMBER OF BIRTHDAY PARTY ROOMS PER OPERATION

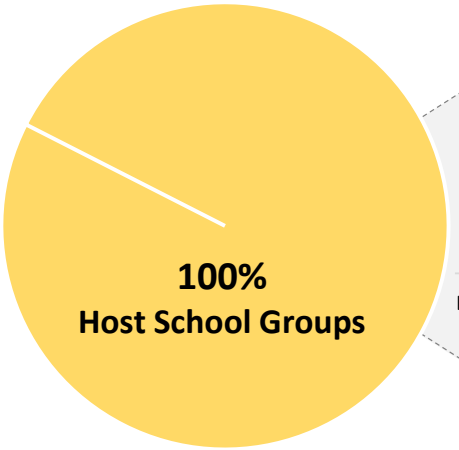
29% of respondents have	More than one
71% of respondents have	One

SCHOOL VISITS OPERATIONS TRENDS

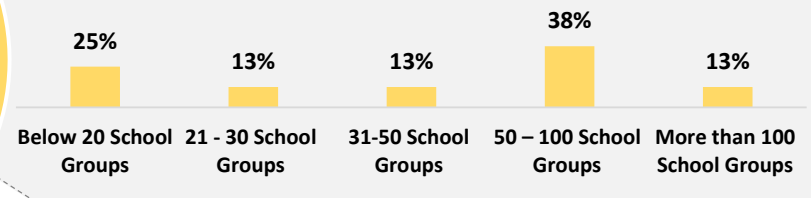


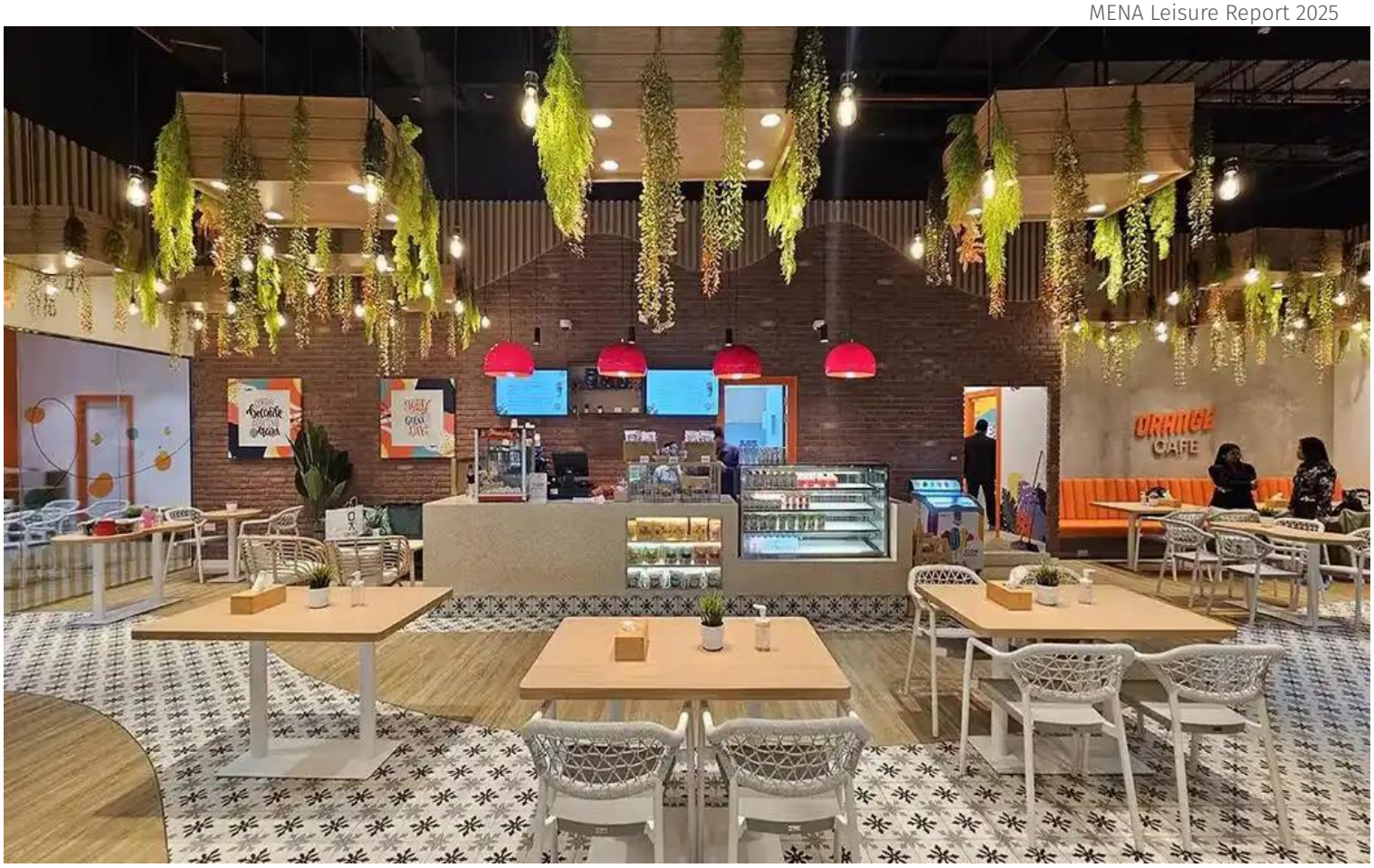
NUMBER OF SCHOOL GROUPS HOSTED PER YEAR - FEC





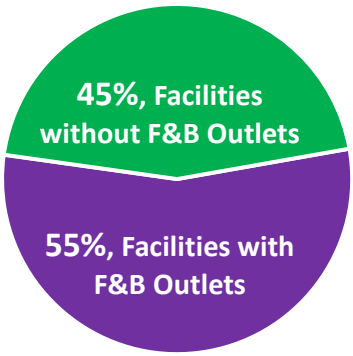
NUMBER OF SCHOOL GROUPS HOSTED PER YEAR – PARTICIPATORY PLAY AREAS





FOOD & BEVERAGE TRENDS - FECs & PARTICIPATORY PLAY AREAS

FACILITIES OFFERING F&B OUTLETS



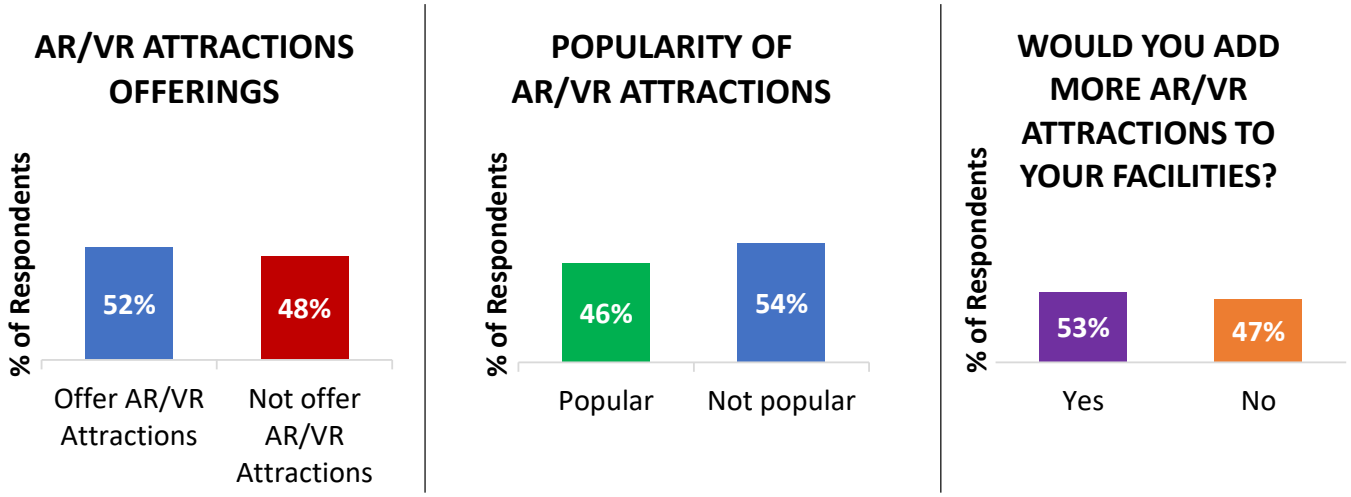
Broader sentiment strongly favors F&B as a value-adding component with 69% facilities reporting that F&B increases dwell time & 79% of facilities believe that adding F&B outlets boosts overall revenue.

FOOD & BEVERAGE TRENDS - THEME PARKS & WATER PARKS



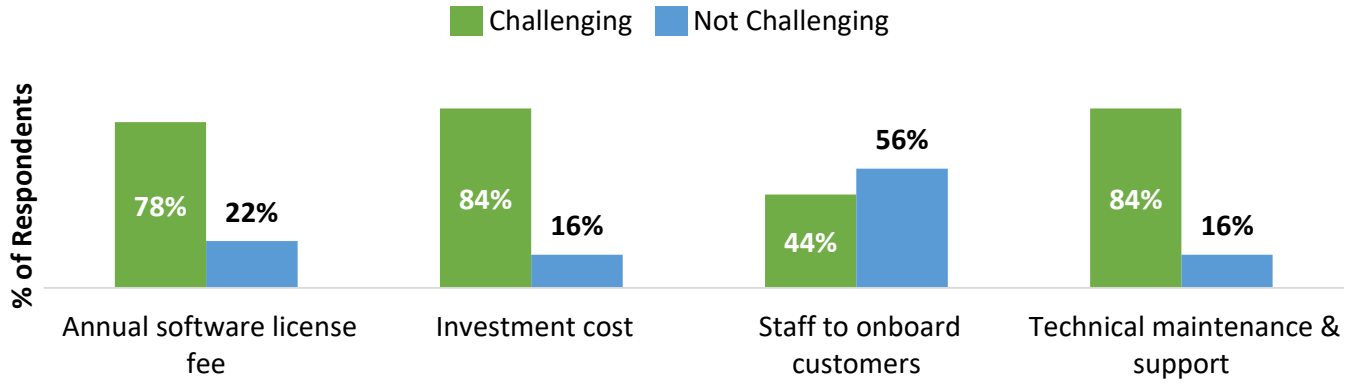
All Theme Parks and Water Parks across the MENA region offer Food & Beverage services, with an average of 10 outlets per facility.

AR/VR ATTRACTIONS TRENDS - FECs



Although 52% of FECs are offering AR/VR Attractions across MENA region, majority of the respondents feel that such attractions aren't popular at their operations.

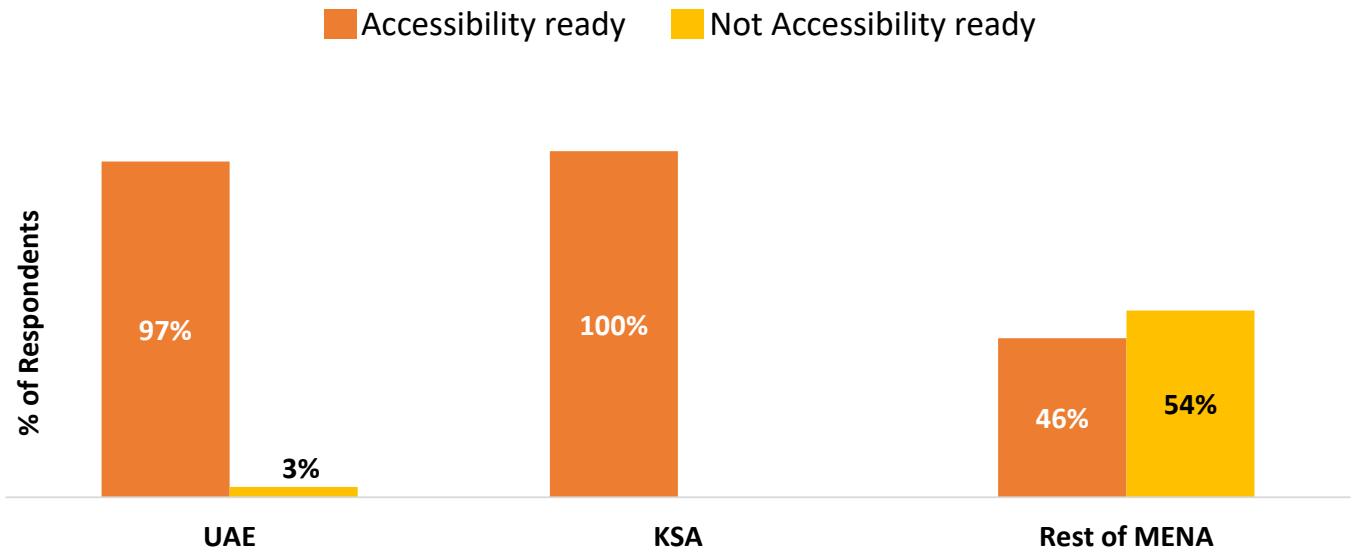
TYPICAL CHALLENGES WITH AR/VR ATTRACTIONS





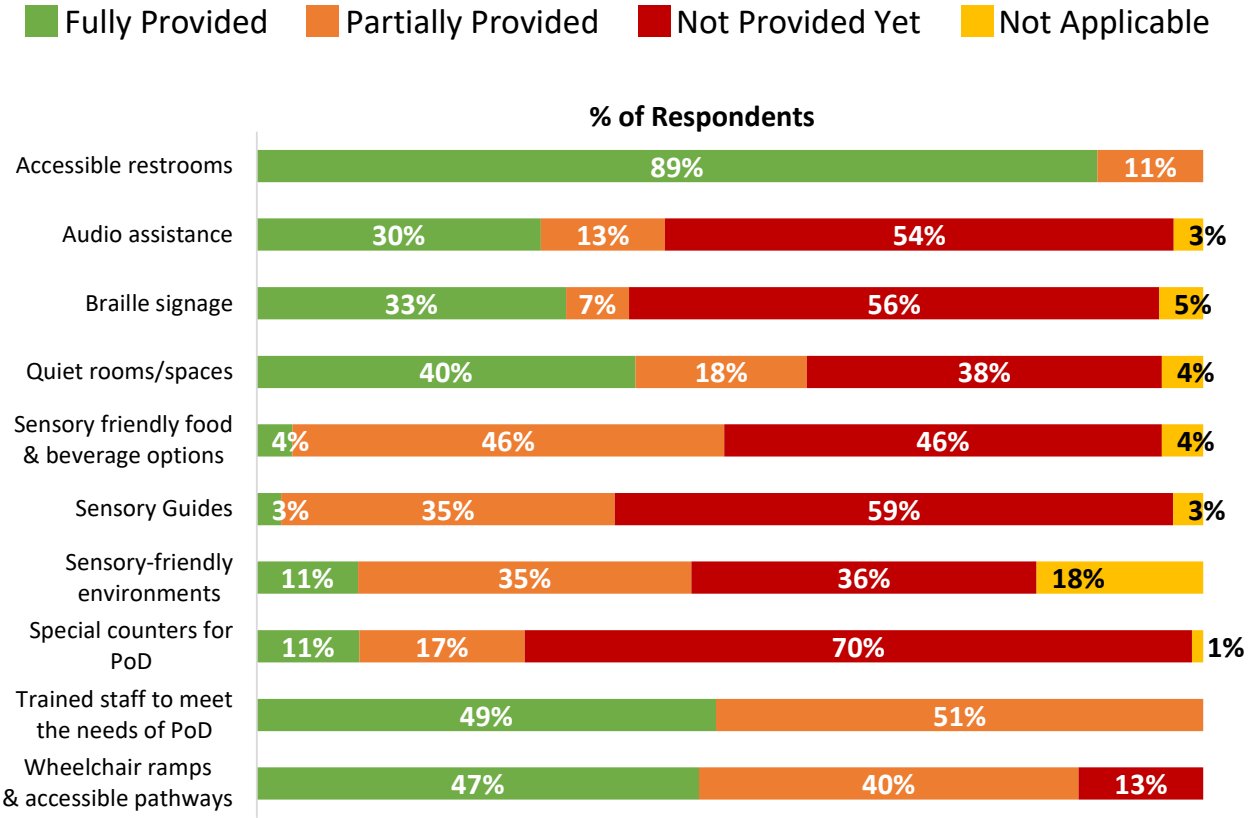
ACCESSIBILITY TRENDS

IS YOUR FACILITY ACCESSIBILITY READY?



90% of MENA Entertainment Centres are accessibility ready.

PROVISION OF ACCESSIBILITY FEATURES

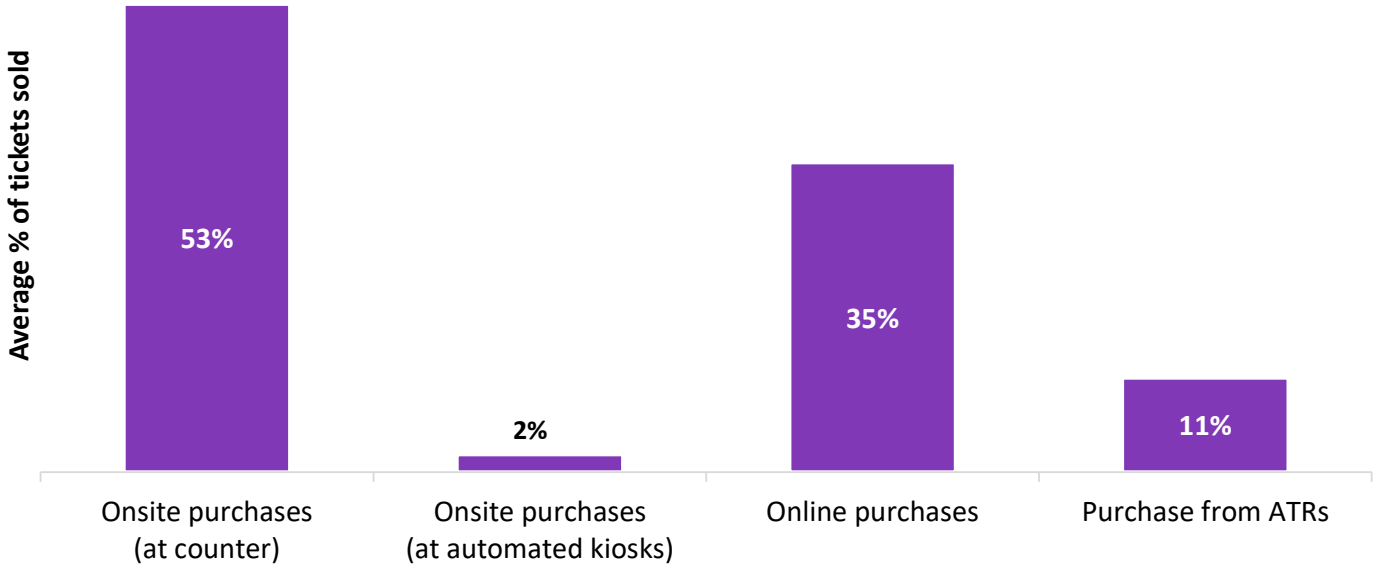


NOTE: PoD – People of determination

As facilities continue to improve their inclusivity efforts, there is growing potential to enhance support through features like dedicated PoD counters, sensory guides, Braille signage & audio assistance—ensuring a more welcoming experience for all customers.

ONLINE vs ONSITE PURCHASE

TICKET SALES DISTRIBUTION BY CHANNEL – THEME PARKS & WATER PARKS

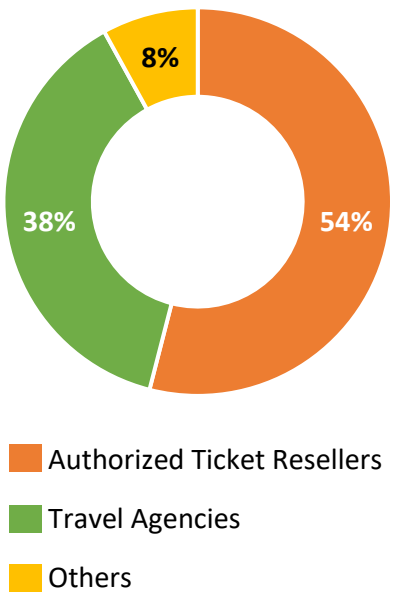


On an average, 53% of ticket sales for Theme Parks & Water Parks is done at the counter indicating that most visitors still prefer or rely on traditional in-person purchase methods.

For FECs & Participatory Play Areas, 100% of the Card/Session Sales is done at the onsite counter or onsite kiosks. About 7% of the FEC respondents indicated that their customers top up card balances online.

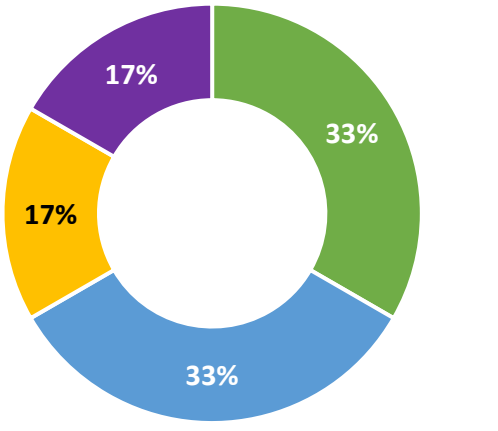
TICKETING CHANNELS – THEME PARKS & WATER PARKS

TICKETING CHANNELS USED

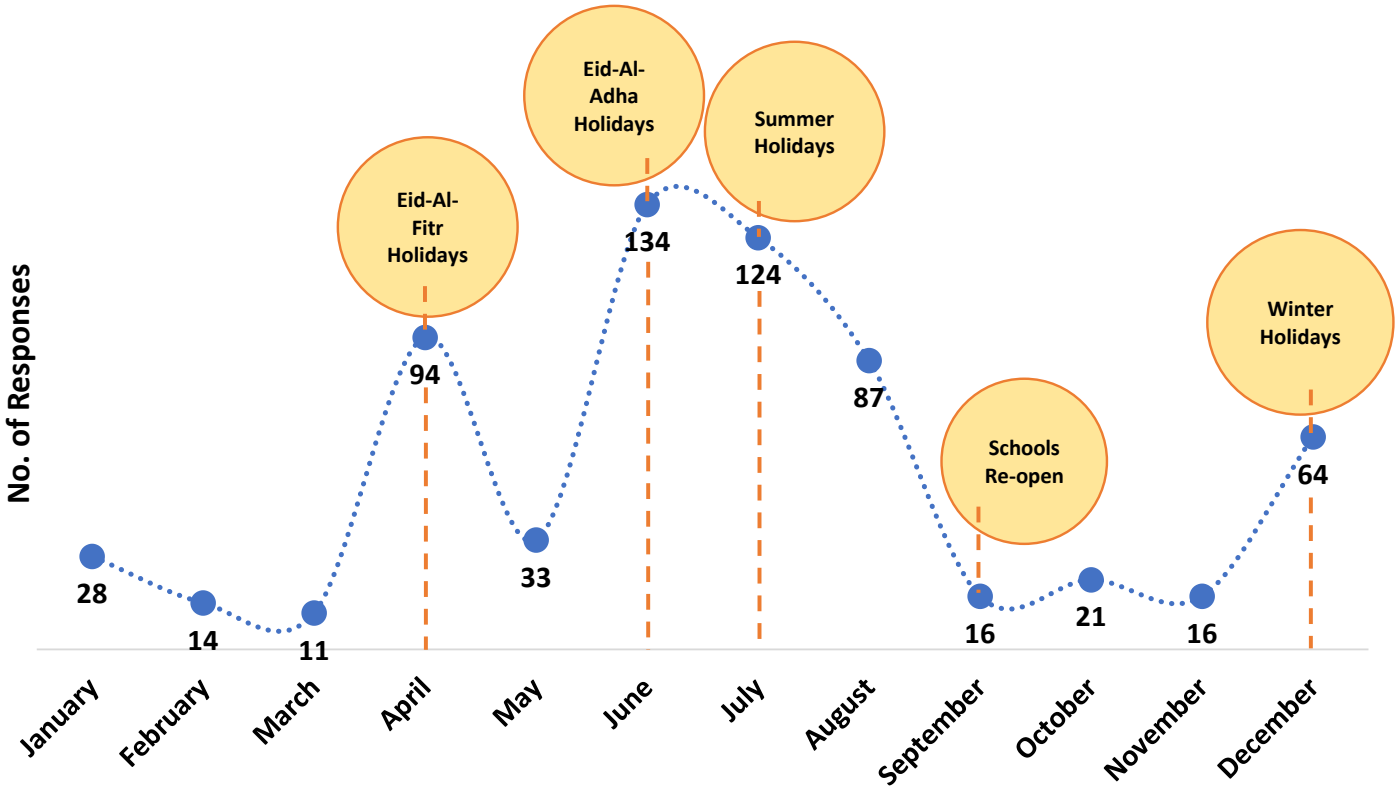


Others include Hotel Partners

SALES FROM ATRs/TRAVEL AGENCIES



PEAK BUSINESS MONTHS (2024)



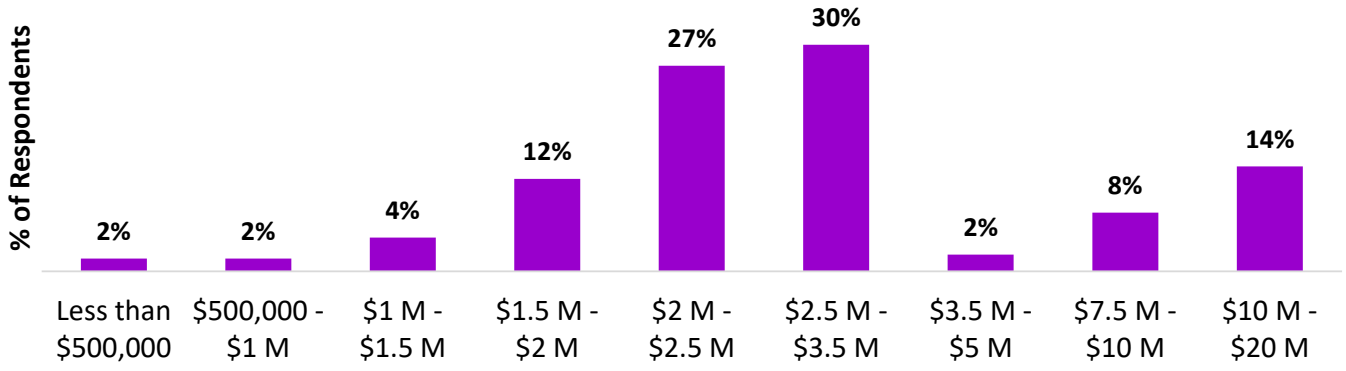
April, June & July were identified by operators as the high revenue generating months in 2024. These months coincide with the Eid holidays as well as school summer breaks.



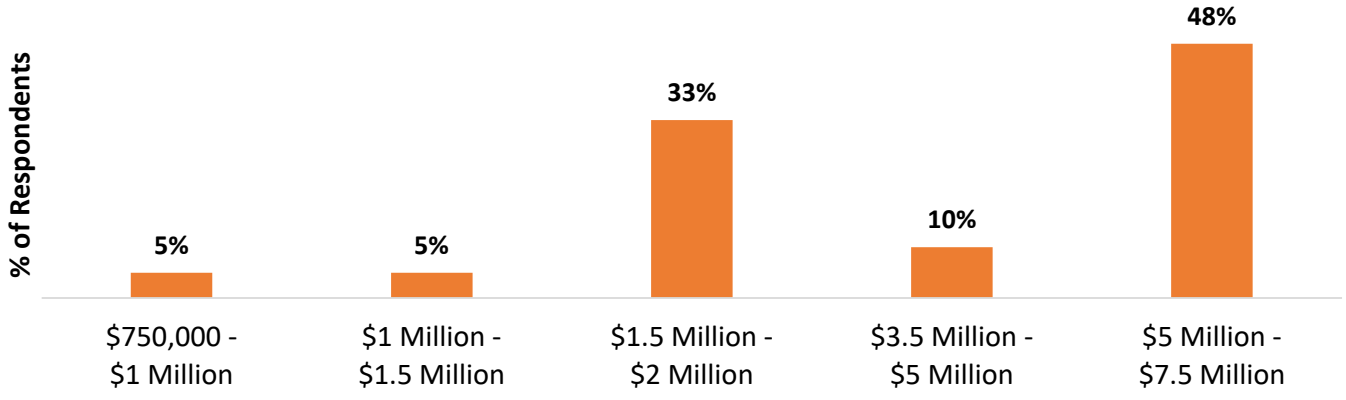
Riyadh Boulevard World, Riyadh

Annual Revenue Analysis

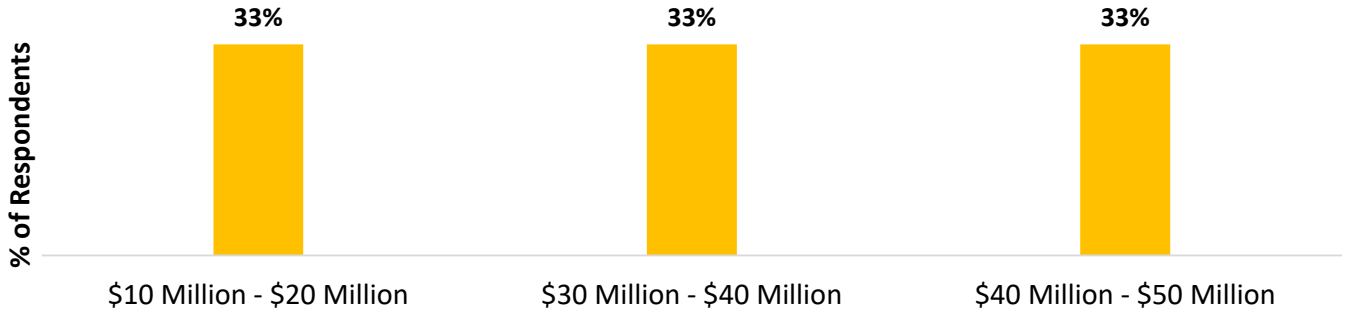
CONSOLIDATED ANNUAL REVENUE PER FEC OPERATOR



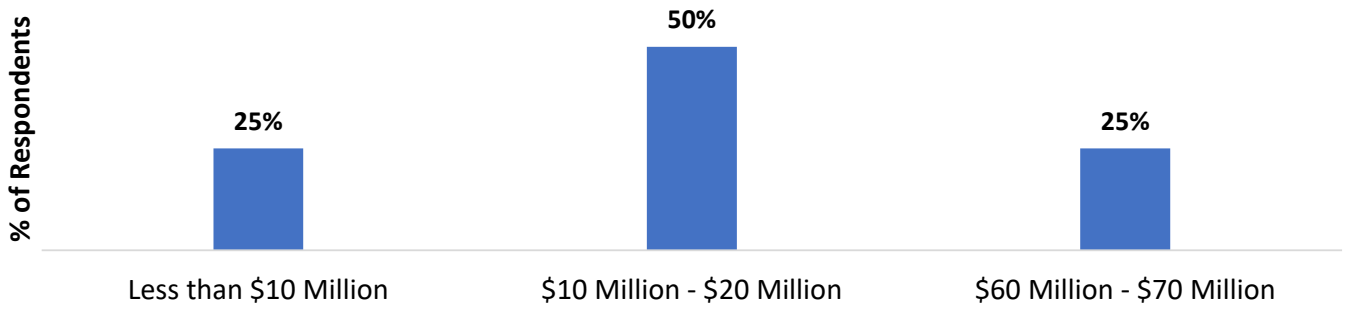
CONSOLIDATED ANNUAL REVENUE PER PLAY AREA OPERATOR



CONSOLIDATED ANNUAL REVENUE PER THEME PARK OPERATOR

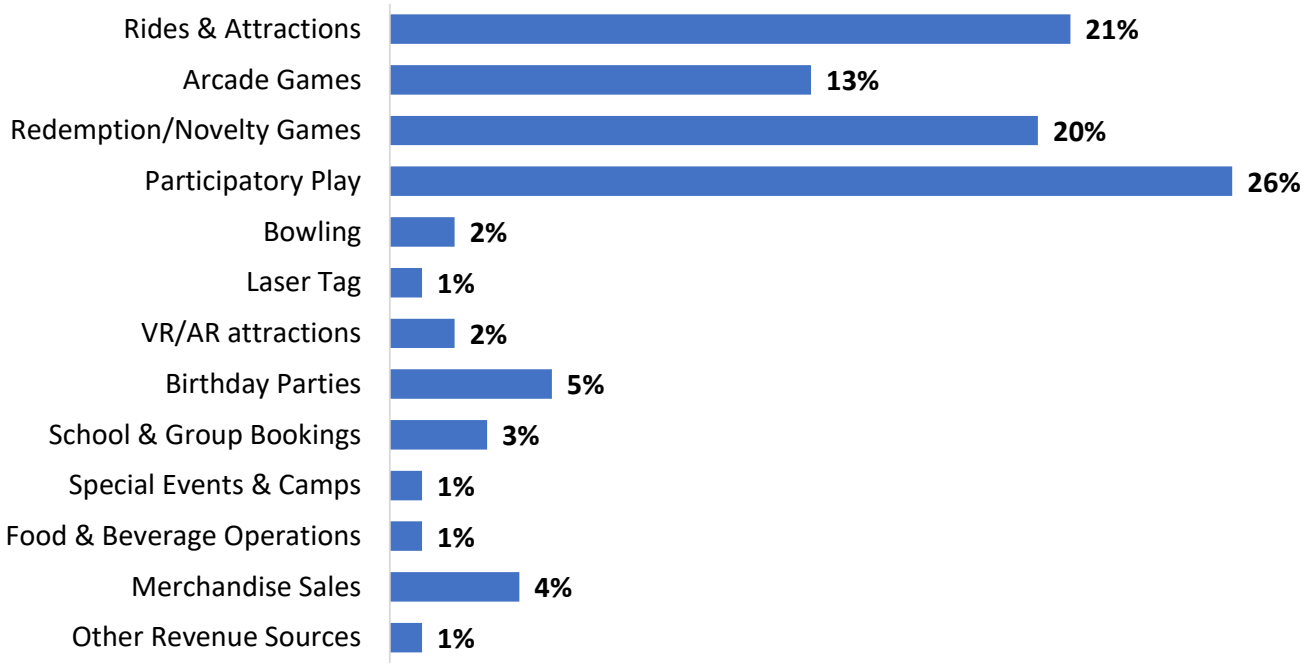


CONSOLIDATED ANNUAL REVENUE PER WATER PARK OPERATOR



REVENUE SPREAD

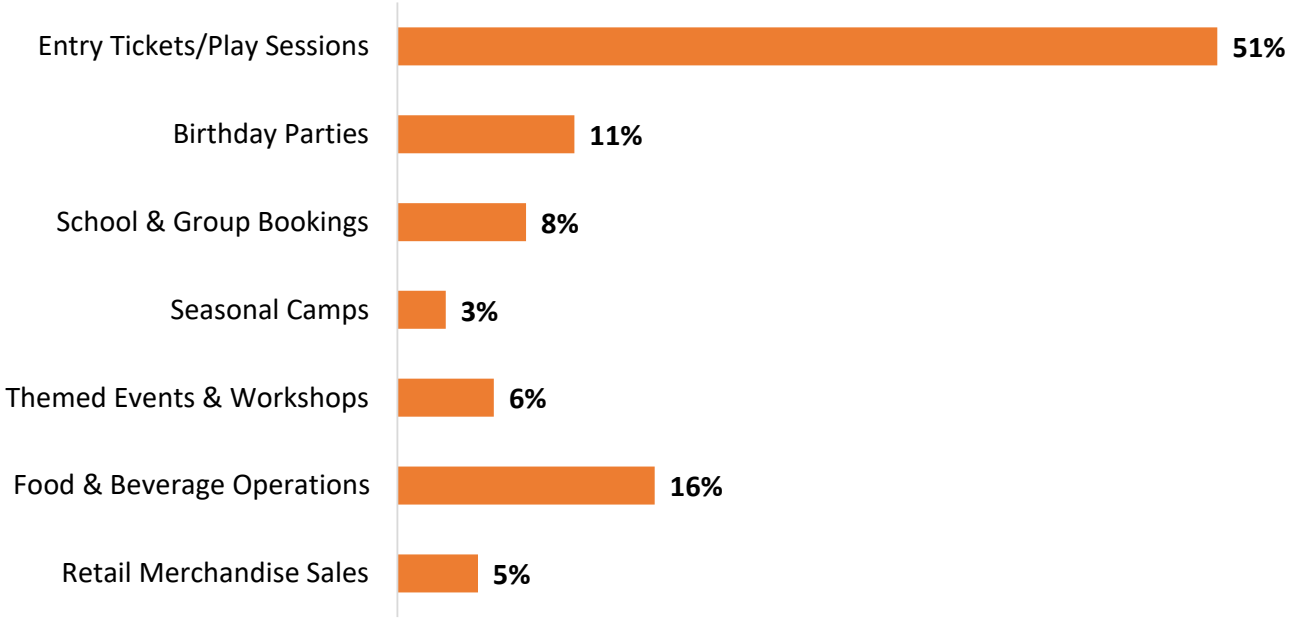
TYPICAL REVENUE SPREAD BY CATEGORIES FOR FECs



NOTE FOR FECs:
**Rides & Attractions includes Amusement Rides*
** Arcade Games - Games that do not have payout/dispense tickets or prizes*
** Redemption/Novelty Games also include Carnival Games (games that give tickets/prizes)*
** Participatory Play includes Playgrounds, Soft Play/Toddler Play, Climbing Walls, Trampoline Parks, Inflatable Parks*

For FECs, around 67% most of their revenue is generated by Participatory Play, Rides & Attractions and Redemption & Novelty games while Participatory Play Areas generate maximum revenue from entry tickets/play sessions.

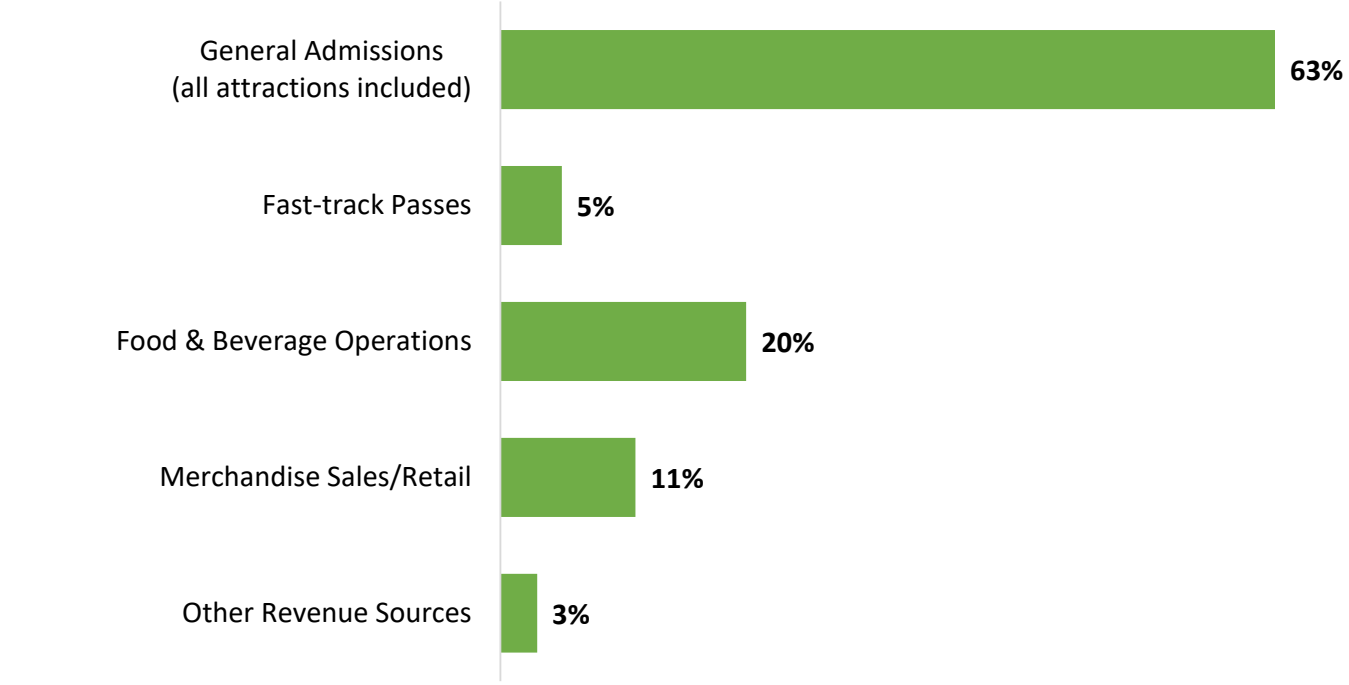
TYPICAL REVENUE SPREAD BY CATEGORIES FOR PARTICIPATORY PLAY AREAS



NOTE FOR PARTICIPATORY PLAY AREAS:
**Themed Events & Workshops e.g., arts and crafts, holiday-themed activities*

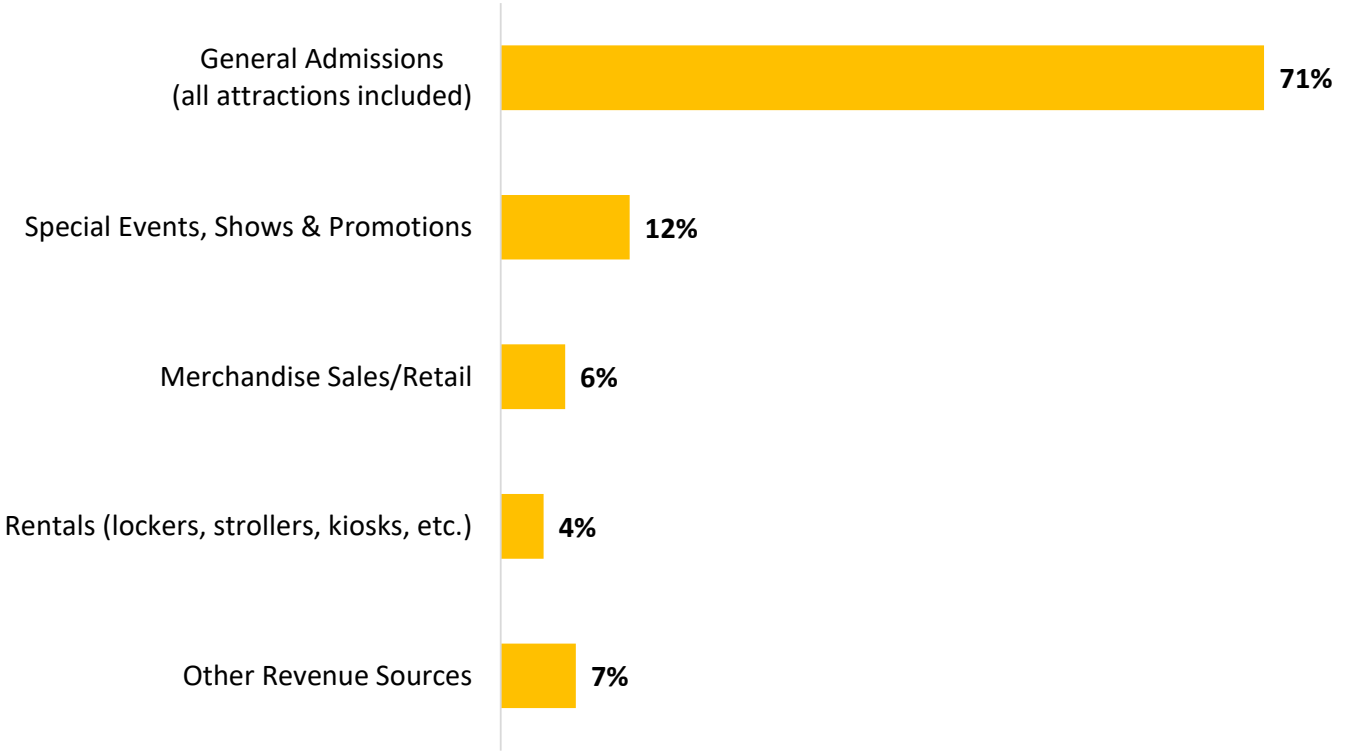
REVENUE SPREAD

TYPICAL REVENUE SPREAD BY CATEGORIES FOR THEME PARKS

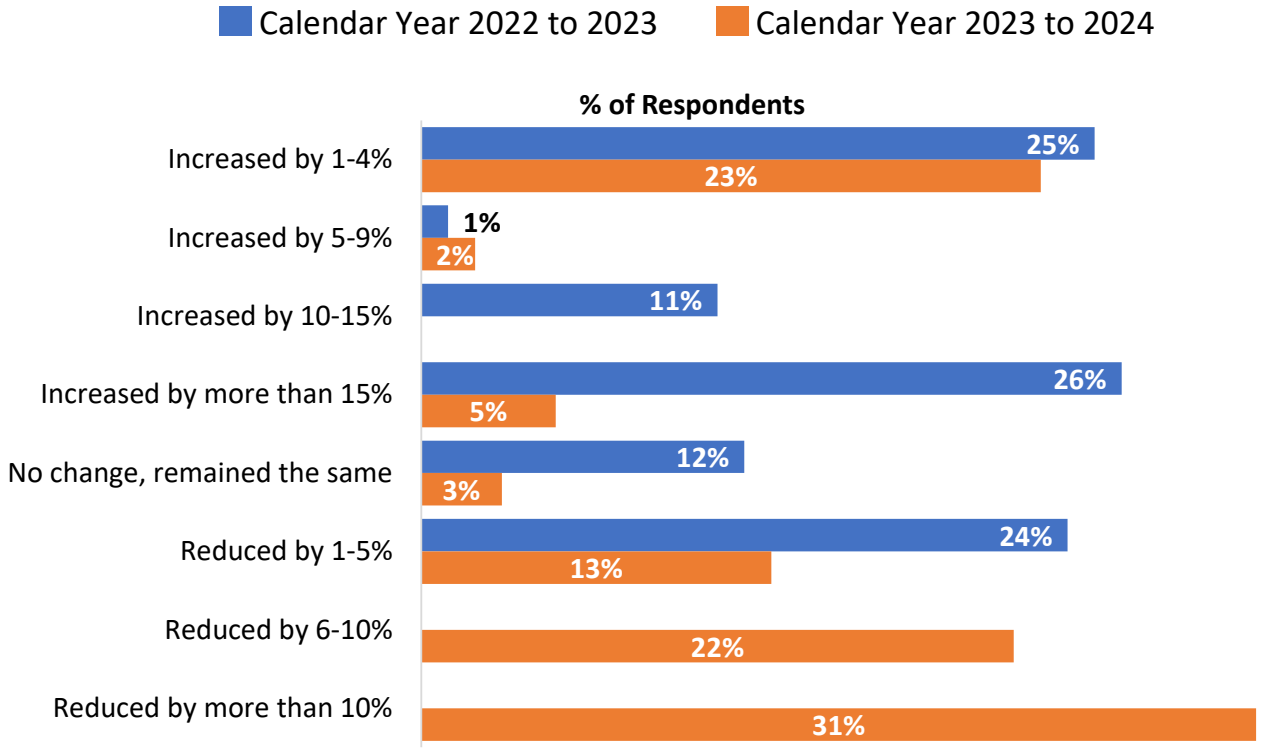


General Admissions dominate the revenue model for Theme Parks & Water Parks, highlighting the core reliance on visitor footfall & entrance fees.

TYPICAL REVENUE SPREAD BY CATEGORIES FOR WATER PARKS

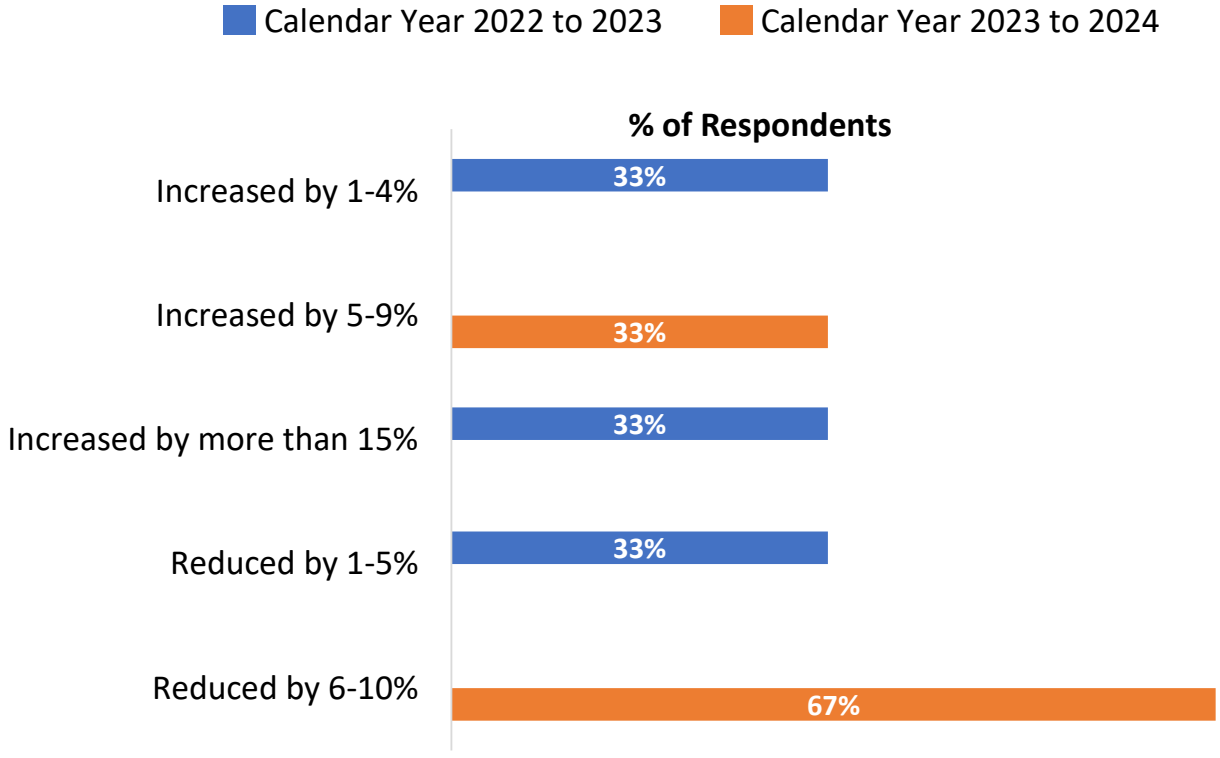


Y-o-Y REVENUE GROWTH – FECs & PARTICIPATORY PLAY AREA



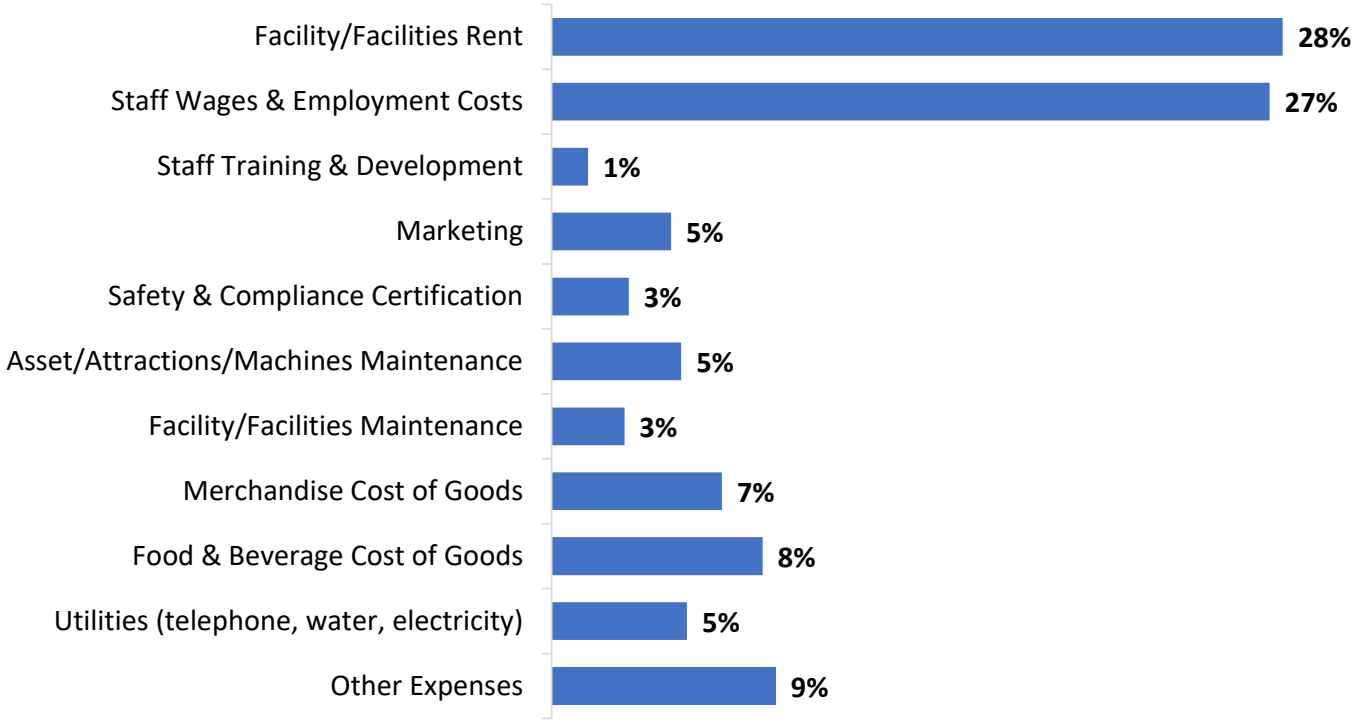
Overall, there's a shift from high growth to moderate/stagnant or declining performance among FECs & Participatory Play Areas in 2024.

Y-o-Y REVENUE GROWTH – THEME PARKS & WATER PARKS



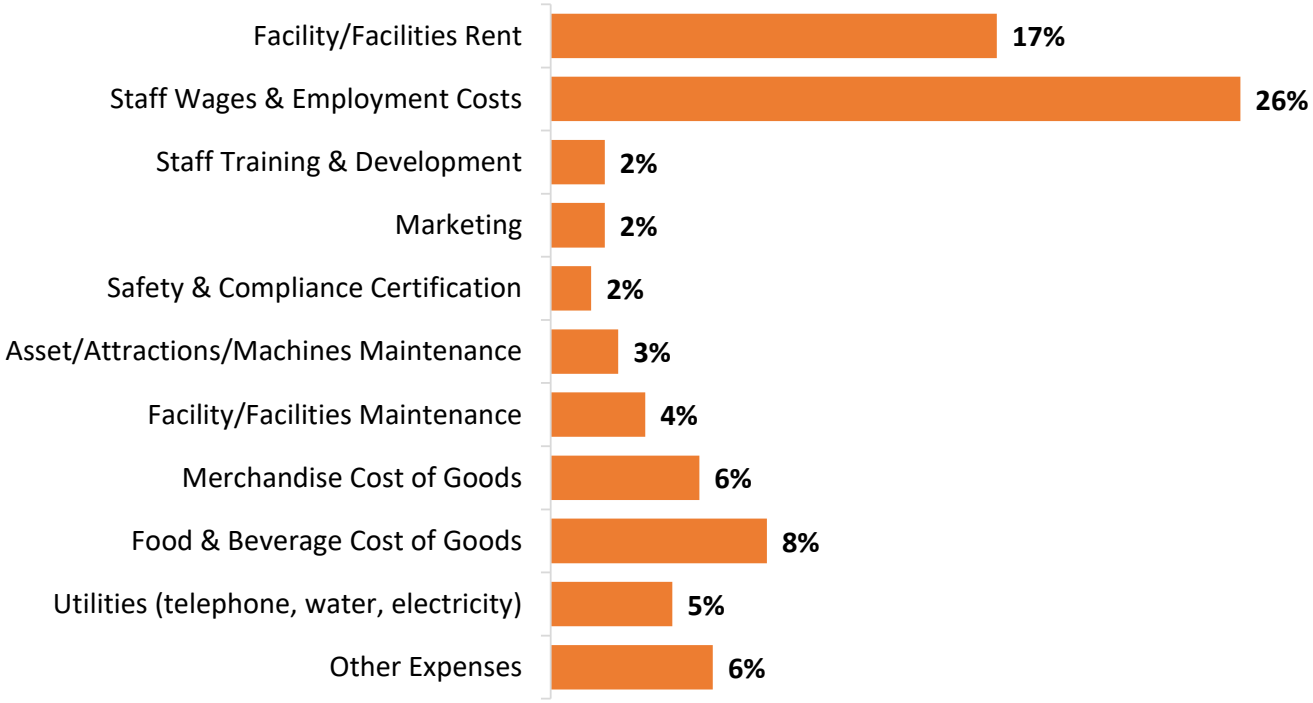
TYPICAL EXPENSE STREAM

AVERAGE % OF ANNUAL REVENUE FOR EXPENSE STREAMS - FECs



NOTE FOR FECs:
**Marketing includes advertising, promotions, social media*
**Safety & Compliance Certification - Annual Attraction Certification/Safety & Regulatory Compliance*

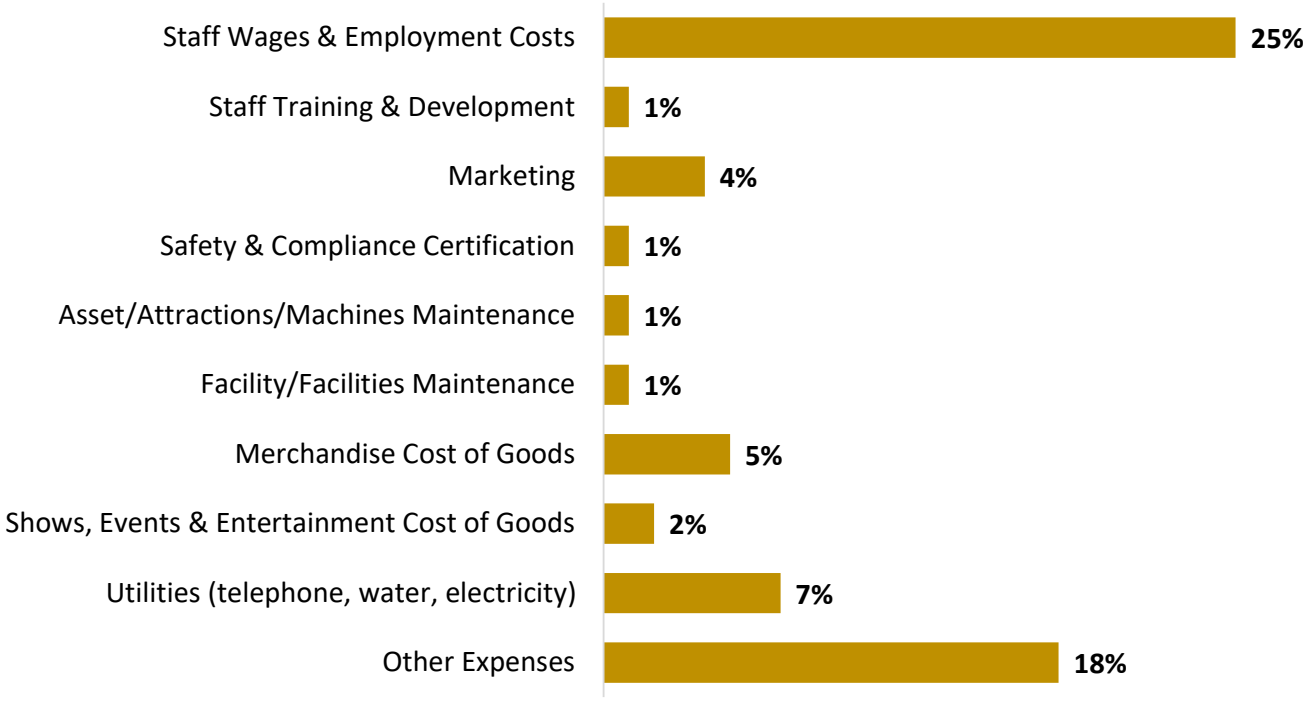
AVERAGE % OF ANNUAL REVENUE FOR EXPENSE STREAMS – PARTICIPATORY PLAY AREAS



NOTE FOR PARTICIPATORY PLAY AREAS:
**Marketing includes advertising, promotions, social media*
**Safety & Compliance Certification - Annual Attraction Certification/Safety & Regulatory Compliance*

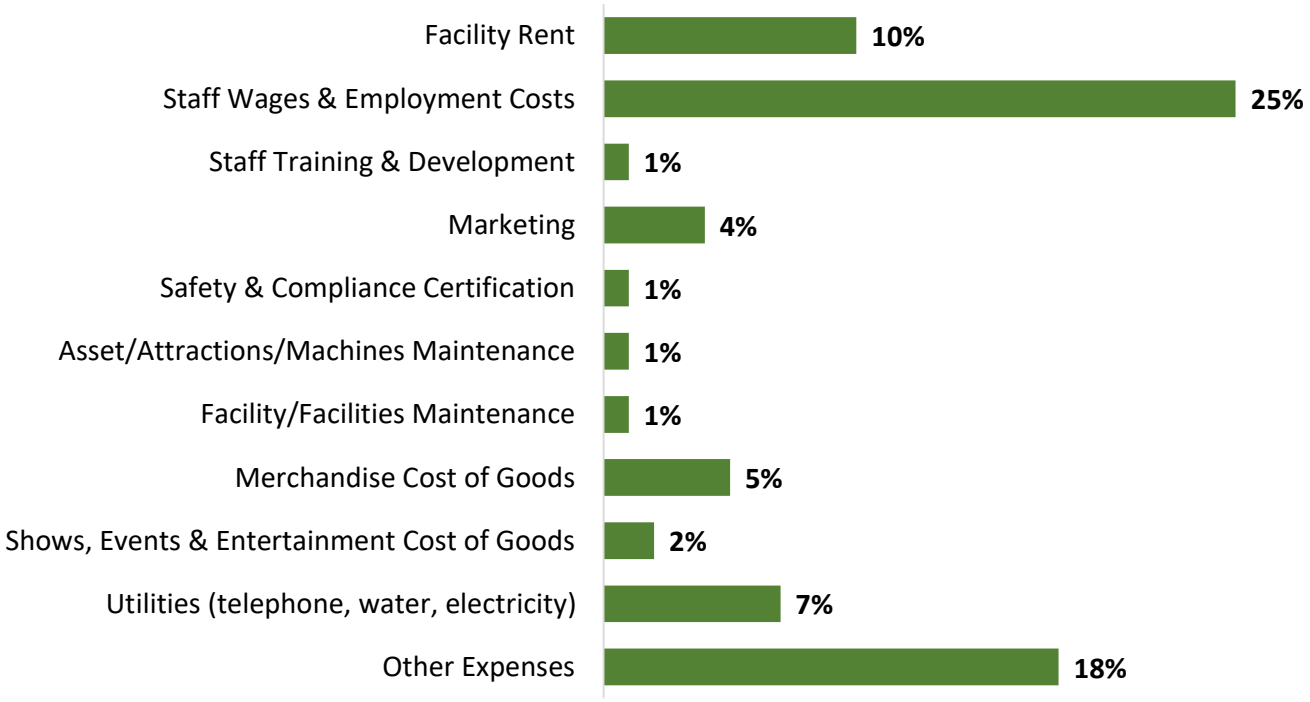
TYPICAL EXPENSE STREAM

AVERAGE % OF ANNUAL REVENUE FOR EXPENSE STREAMS – THEME PARKS



NOTE FOR THEME PARKS:
**Marketing includes advertising, promotions, social media*
**Safety & Compliance Certification - Annual Attraction Certification/Safety & Regulatory Compliance*

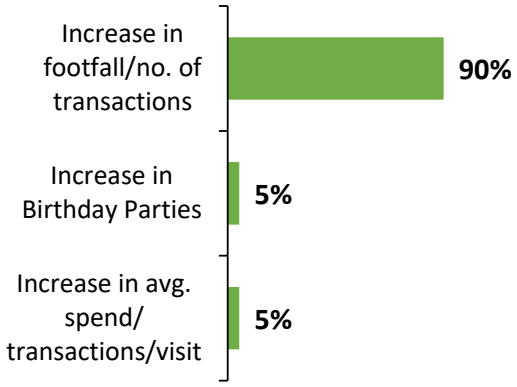
AVERAGE % OF ANNUAL REVENUE FOR EXPENSE STREAMS - WATER PARKS



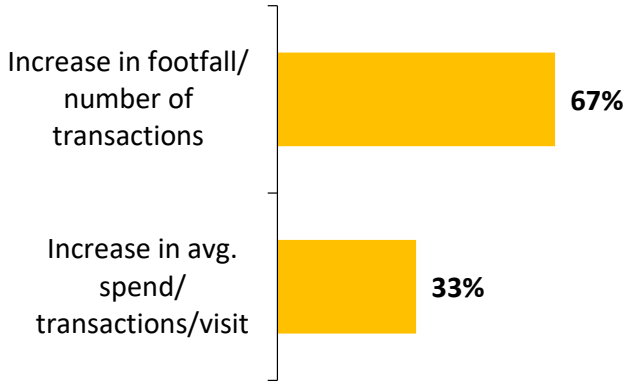
NOTE FOR WATER PARKS:
**Marketing includes advertising, promotions, social media*
**Safety & Compliance Certification - Annual Attraction Certification/Safety & Regulatory Compliance*

REVENUE METRIC WITH SIGNIFICANT IMPACT ON OPERATING PROFIT

FECs & PARTICIPATORY PLAY AREAS



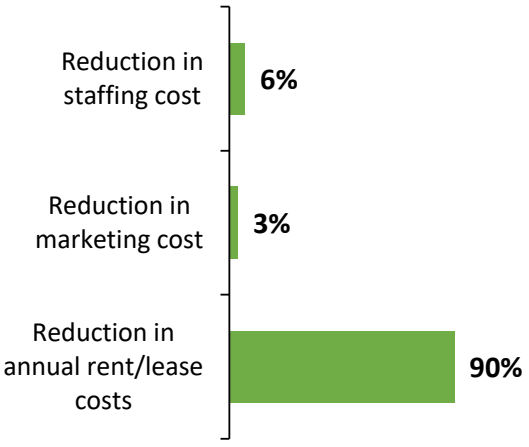
THEME PARKS & WATER PARKS



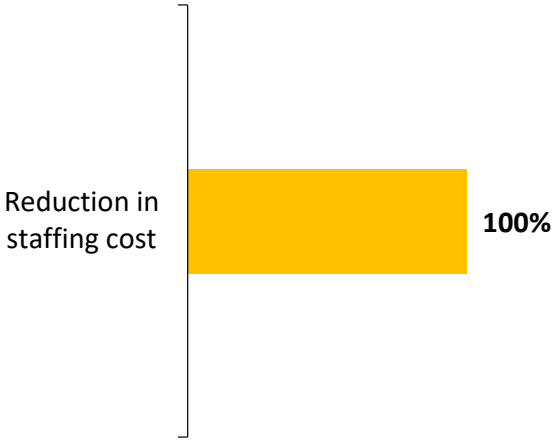
In FECs & Participatory Play Areas as well as Theme Parks & Water Parks, increased footfall & number of transactions was identified as the most impactful revenue metric influencing operating profit in 2024.

EXPENSE METRIC THAT ENHANCE OPERATING PROFIT

FECs & PARTICIPATORY PLAY AREAS



THEME PARKS & WATER PARKS

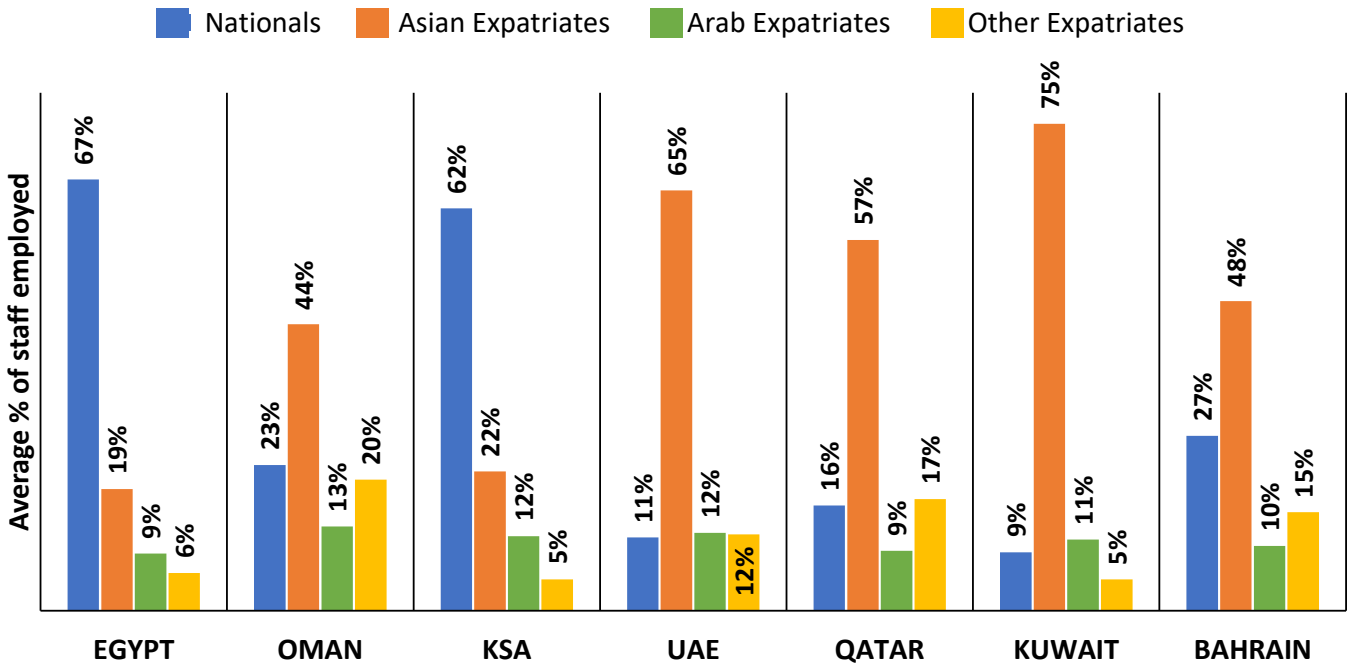


While rent reduction is the top cost-saving lever for FECs & Participatory Play Areas, Theme Parks & Water Parks see staffing cost cuts as the most effective way to enhance operating profit.

Staffing and employment



NATIONALITY OF STAFF EMPLOYED ACROSS MENA



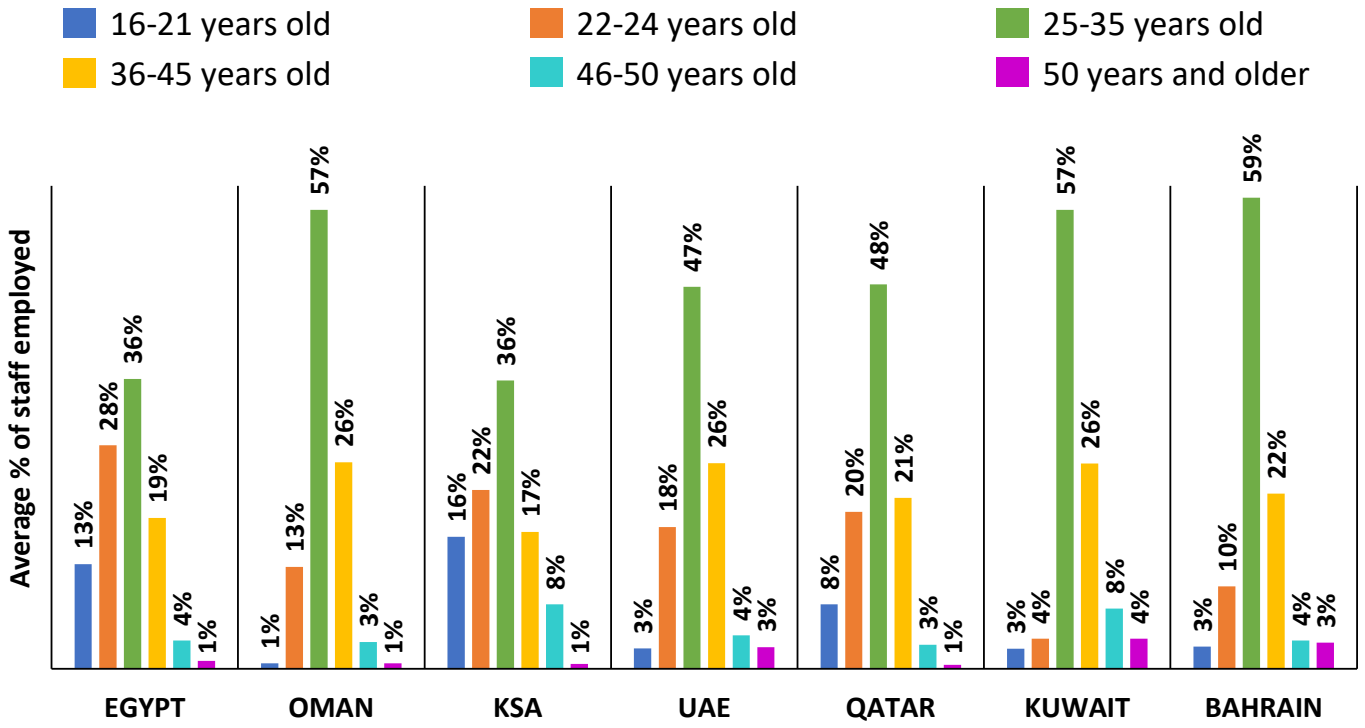
The leisure sector across MENA showcases a diverse workforce, with a prominent presence of Asian expatriates. Egypt and KSA show higher national employment, indicating ongoing nationalisation efforts.

AVERAGE EMPLOYEE COUNT & SIZE OF FACILITIES

INDUSTRY SEGMENT	FEC	PLAY AREA	THEME PARK	WATER PARK
Average full-time employees per operation	45	15	300	240
Average size of the facility in sq. m	2,400	990	110,000	125,000

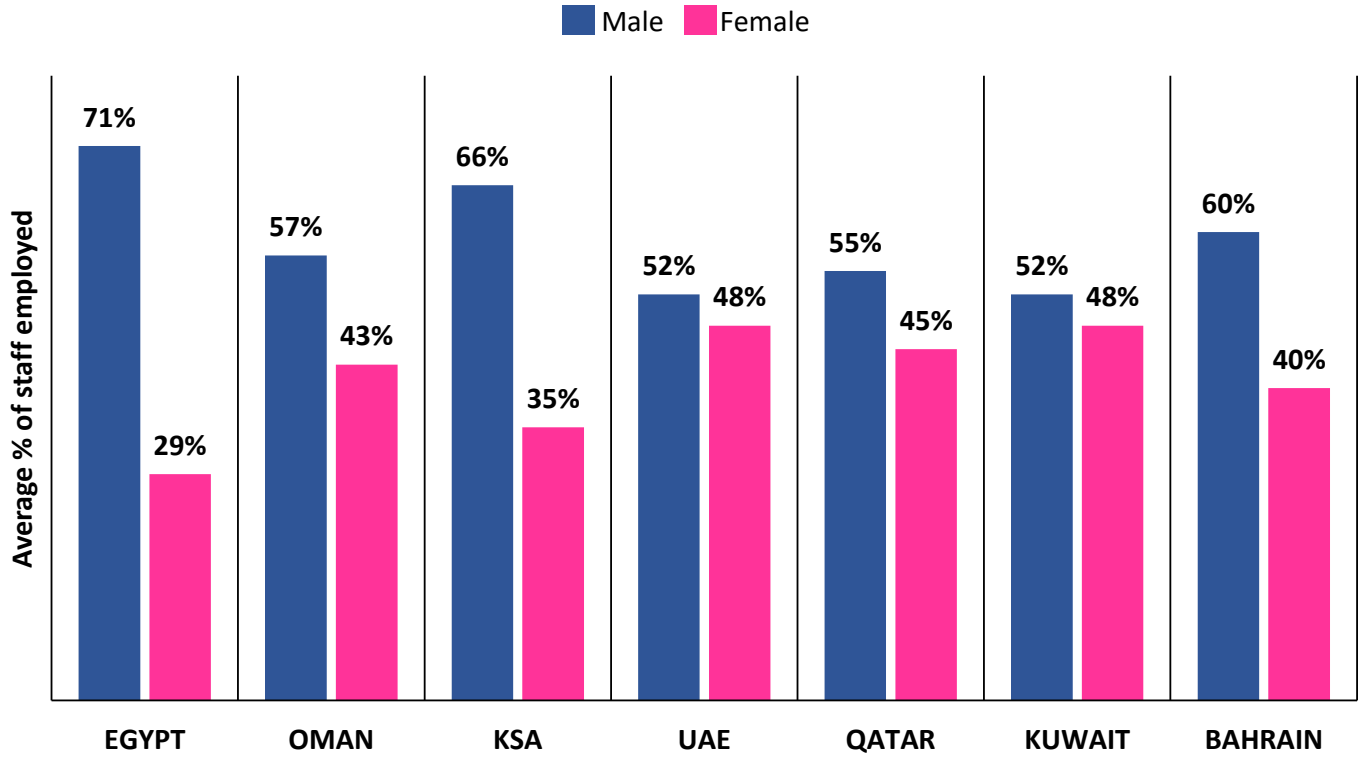
NOTE: The respondents answered for the number of full-time employees and size of facilities within a range. Midpoints have been considered and a subjective decision is taken whether the responses are total or individual figures for the purpose of analysis.

STAFF AGE DISTRIBUTION ACROSS MENA



The MENA leisure industry is largely driven by professionals aged 25–45, reflecting a dynamic, service-focused workforce and opportunities for youth employment & growth.

STAFF GENDER DISTRIBUTION ACROSS MENA



While male employees remain the majority in most countries, the growing gender balance in places like UAE and Kuwait points to positive strides in workplace diversity.

SALARIES AND WAGE ANALYSIS

FECs & PLAY AREAS - SALARIES FOR KEY POSITIONS IN US DOLLARS ($)

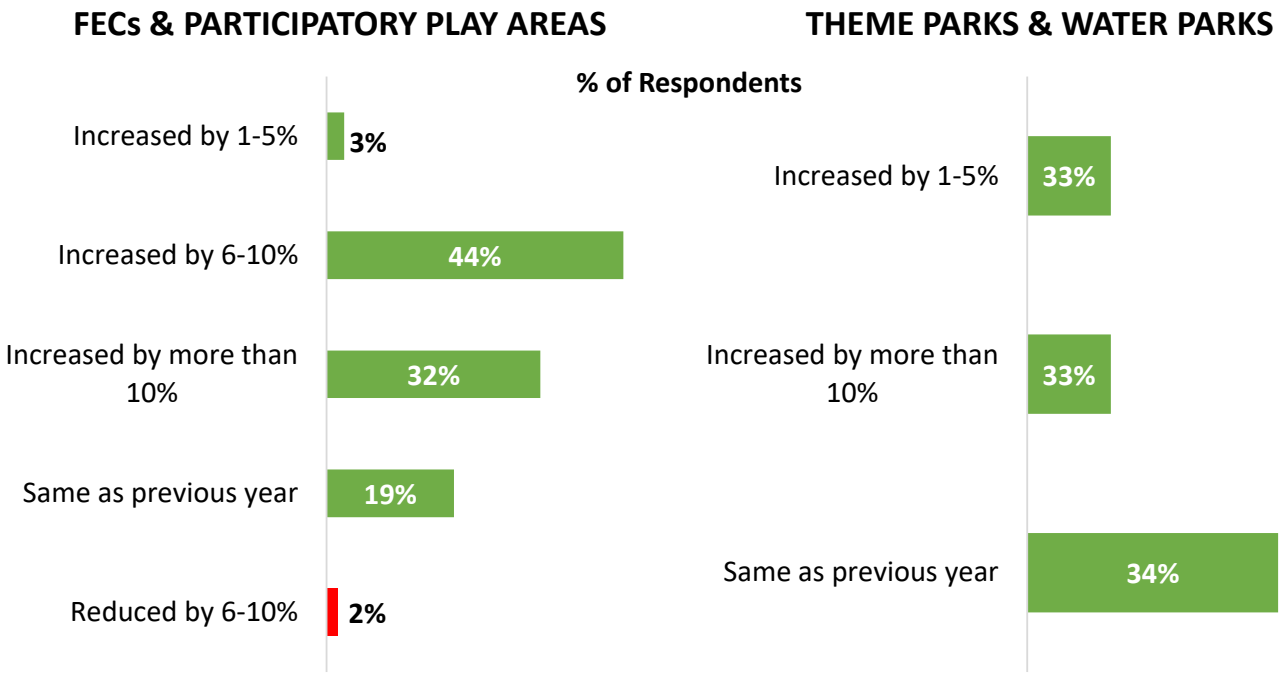
DESIGNATIONS	AVERAGE MONTHLY SALARY
CASHIERS	Less than $1000
CUSTOMER SERVICE ATTENDANTS	Less than $1000
GAME ATTENDANTS	Less than $1000
HOUSEKEEPING ATTENDANTS	Less than $1000
OPERATION SUPERVISOR	$1251 - $1500
PARTY HOSTS	Less than $1000
PLAY AREA ATTENDANTS	Less than $1000
SHIFT MANAGER	$1501 - $2000
STORE MANAGER	$1501 - $2000
TECHNICAL MANAGER	$2001 - $3000
TECHNICAL SUPERVISOR	$1501 - $2000
TECHNICIANS	$1251 - $1500

Salary structures across MENA's leisure industry reflect role-specific & operational needs. The above average salaries includes allowances for housing but excludes annual bonuses. The averages are reported based on survey responses received and our independent research on online recruitment forums.

THEME PARKS & WATER PARKS - SALARIES FOR KEY POSITIONS IN US DOLLARS ($)

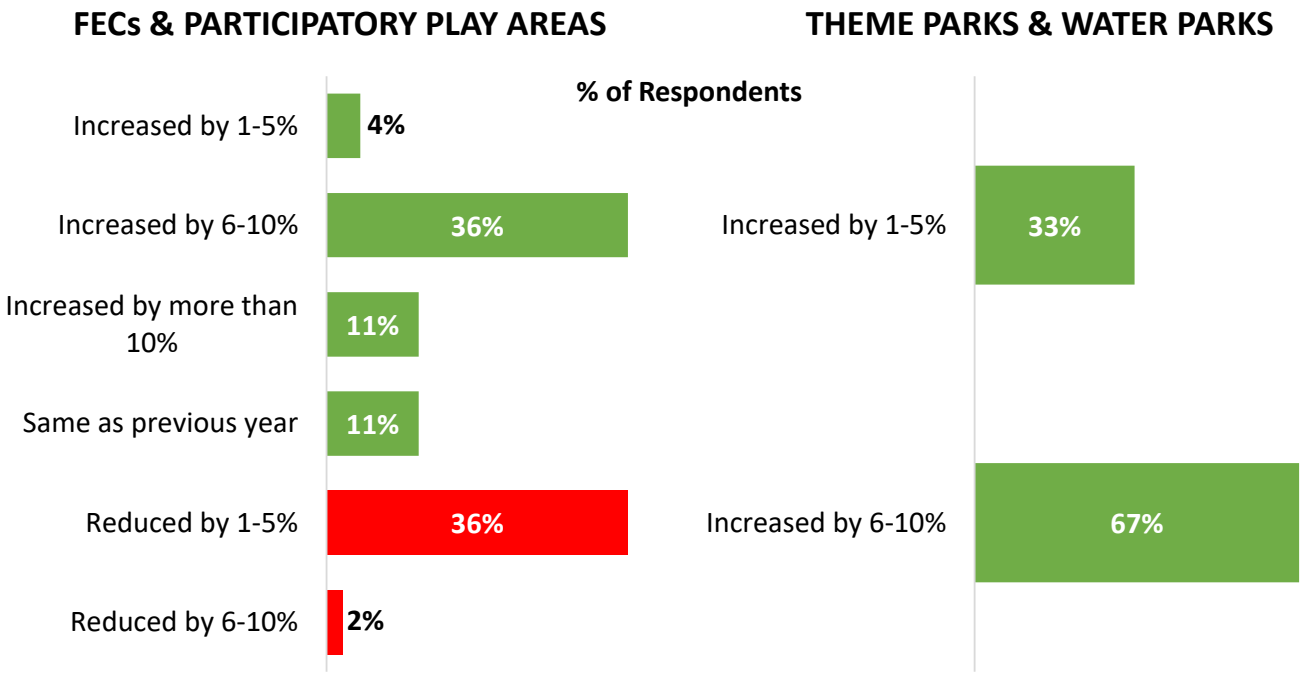
DESIGNATIONS	AVERAGE MONTHLY SALARY
CASHIERS	$1000 - $1500
CUSTOMER SERVICE ATTENDANTS	$1000 - $1500
PARK/ATTRACTION MANAGER	$4000 - $5000
HOUSEKEEPING ATTENDANTS	Less than $1000
RIDE OPERATORS	$1000 - $1500
SUPERVISORS	$2000 - $3000
LIFEGUARDS	Less than $1000
TECHNICAL MANAGER	$4000 - $5000
TECHNICAL SUPERVISOR	$3000 - $4000
TECHNICIANS	$2000 - $3000

CHANGE IN STAFF STRENGTH – 2023 vs 2024



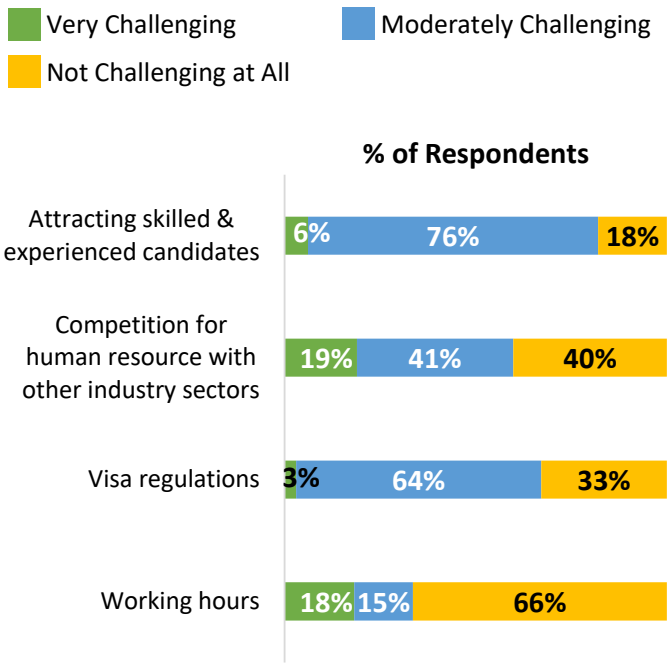
The data reflects a strong post-pandemic recovery, with most facilities expanding their workforce across MENA region—indicating a positive hiring trend across FECs & Participatory Play Areas from 2023 to 2024.

CHANGE IN STAFF COST – 2023 vs 2024

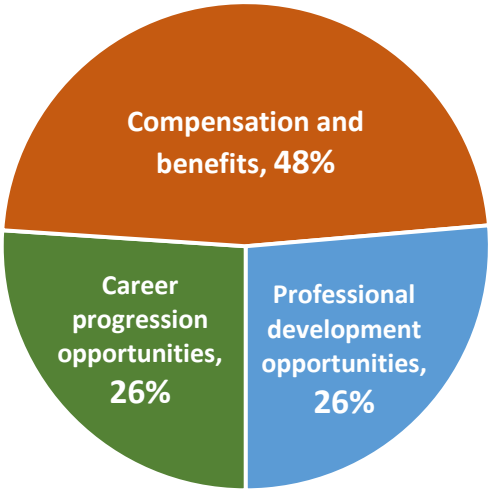


Theme Parks & Water Parks show a uniform increase - highlighting a consistent upward trend in payroll investments, while FECs & Participatory Play Areas have seen an increase in staff strength but reduction in staff cost, possibly alluding to new staff hire at lower wages.

KEY HIRING CHALLENGES

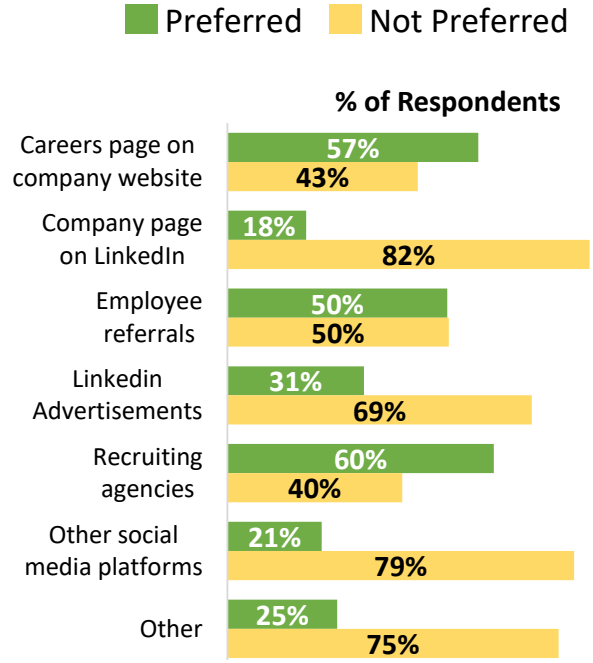


MOST IMPORTANT FACTOR TO ATTRACT FRESH TALENT



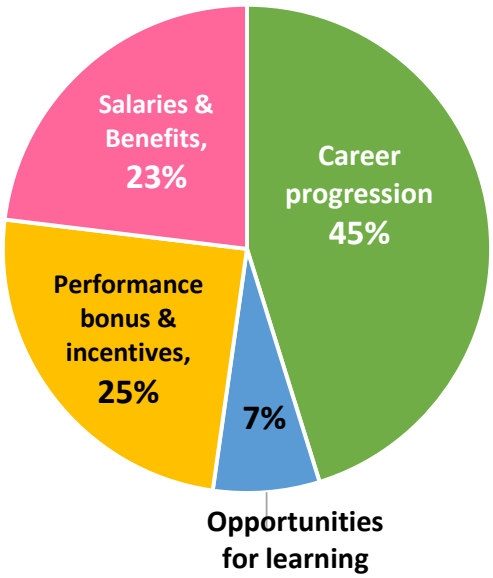
MENA leisure operators find attracting skilled & experienced talent as well as visa regulations as challenging factors while hiring employees for their operations.

PREFERRED RECRUITMENT CHANNELS



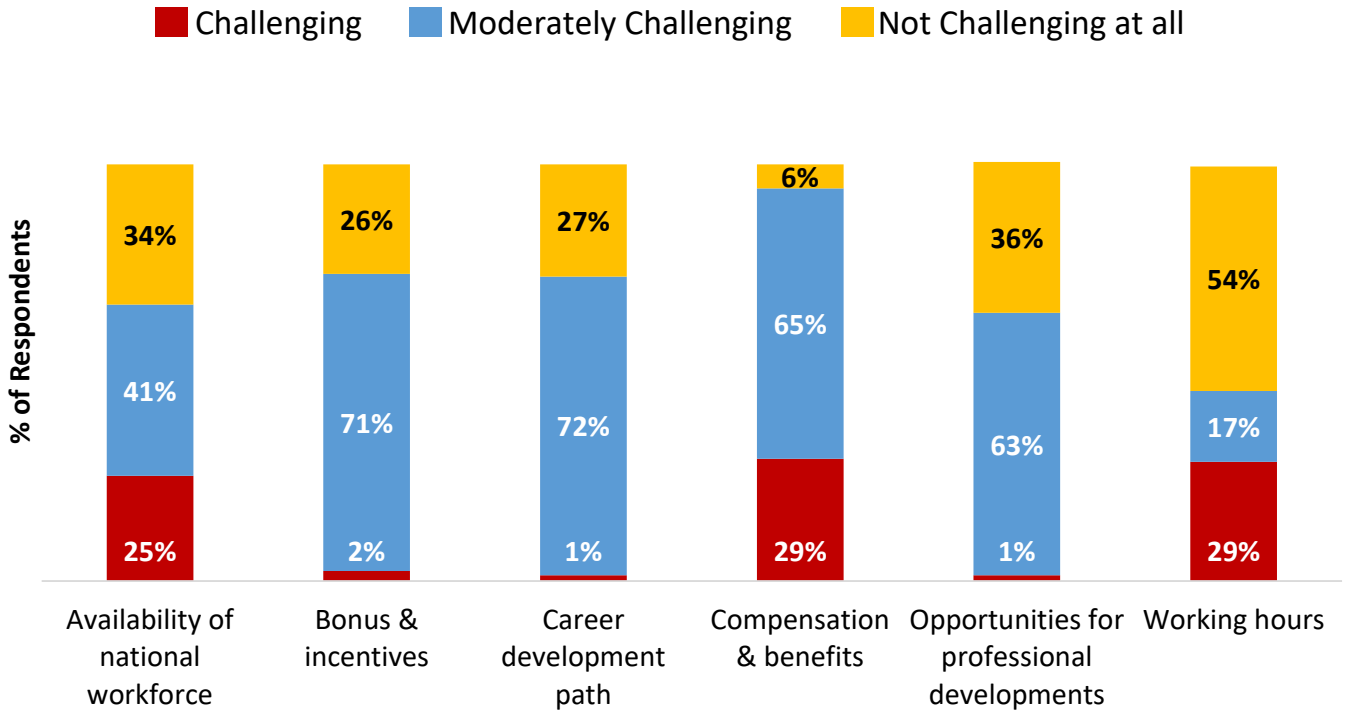
NOTE
Other include platforms like INDEED, recruiting programs by HRDF & other job portals

TOP FACTORS TO RETAIN TALENT



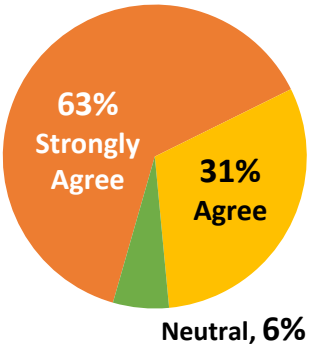
MENA leisure employers prefer direct recruitment channels over social recruitment platforms. Career growth opportunities & financial rewards are the top factors to retain talent within the organisation.

CHALLENGES IN HIRING NATIONALS TO MEET NATIONALISATION GOALS



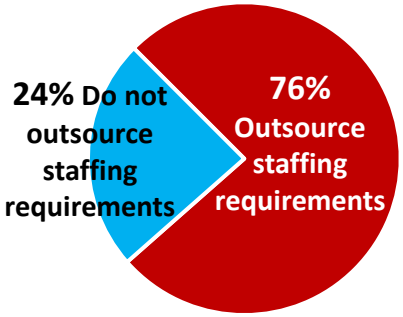
Availability of national workforce and compensation & benefits have been highlighted as moderately challenging factors to achieve nationalisation goals. Working hours, which is a specific parameter to our industry, does not prove to be a challenge to recruit nationals for majority of our respondents.

SHOULD PART-TIME EMPLOYMENT OF UNIVERSITY STUDENTS BE ENCOURAGED?



Support for student part-time employment in the L&E industry is overwhelmingly positive across the region – indicating clear consensus favouring student inclusion in the workforce.

OPERATIONS OUTSOURCING STAFFING REQUIREMENTS



76% of operations in the MENA Leisure sector find it beneficial to outsource staffing to meet their business goals. On an average, 15% of their workforce is outsourced.

PART-TIME EMPLOYMENT

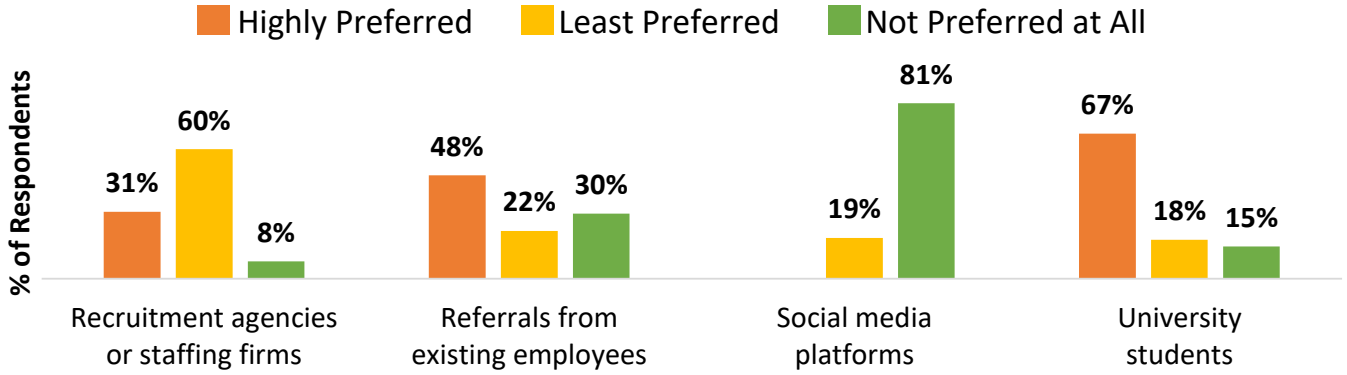


OF THE RESPONDENTS OFFERING PART-TIME EMPLOYMENT,

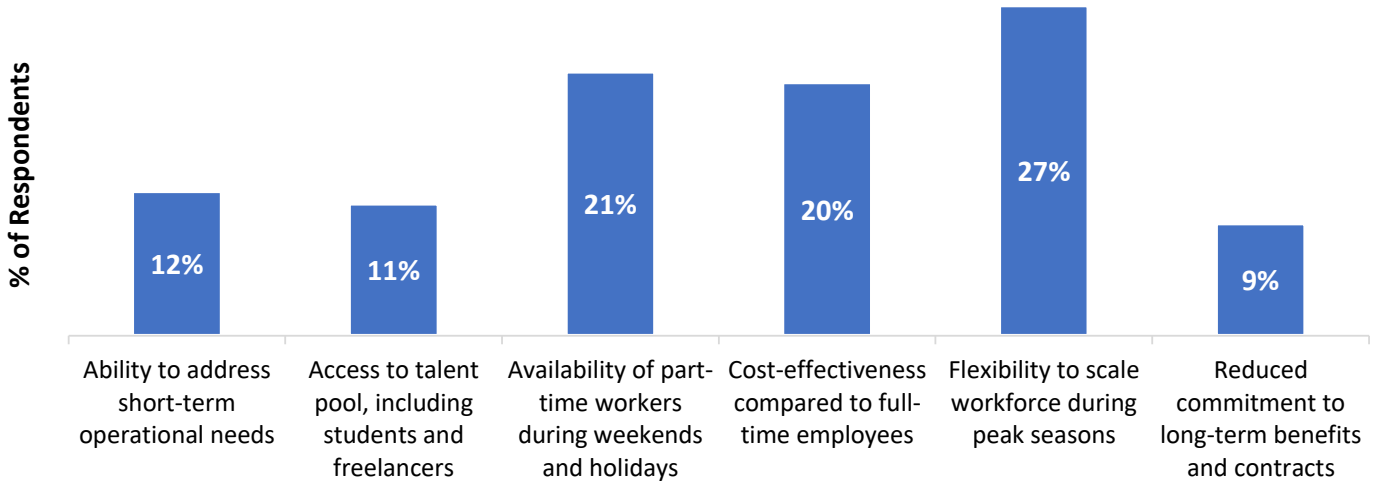
- **52% of respondents** say that ***<5% of their staffing is part-time***
- **43% of respondents** say that ***5-10% of their staffing is part-time***
- **4% of respondents** say that ***10-20% of their staffing is part-time***
- **1% of respondents** say that ***>20% of their staffing is part-time***

Part-time employment is gradually being integrated into the MENA leisure workforce, with most countries offering limited but present opportunities — supporting flexible staffing strategies—often used to manage seasonal demand & optimise labour costs in a dynamic, service-driven industry.

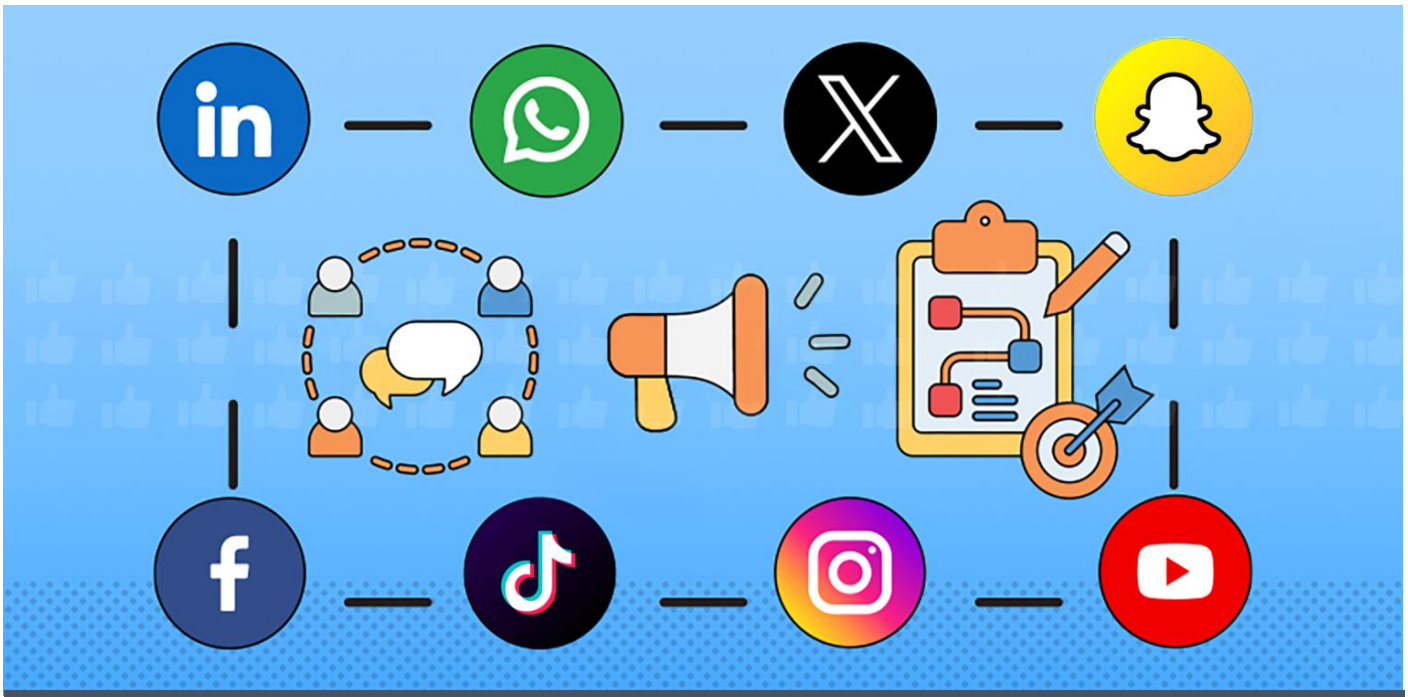
PREFERRED PART-TIME HIRING CHANNELS



MOTIVATIONS FOR HIRING PART-TIME STAFF

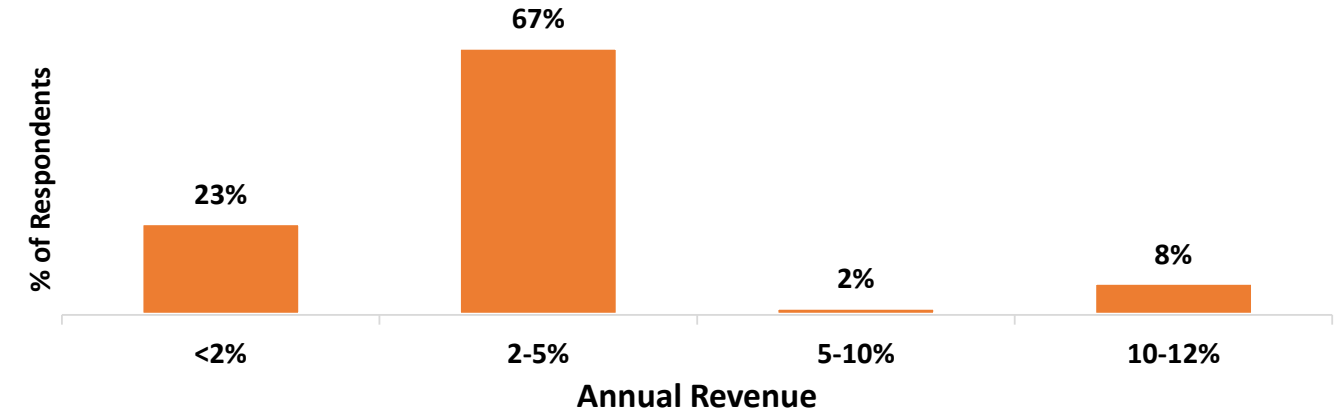


Flexibility during peak seasons is the top motivator, followed by cost-effectiveness and weekends/holidays availability.

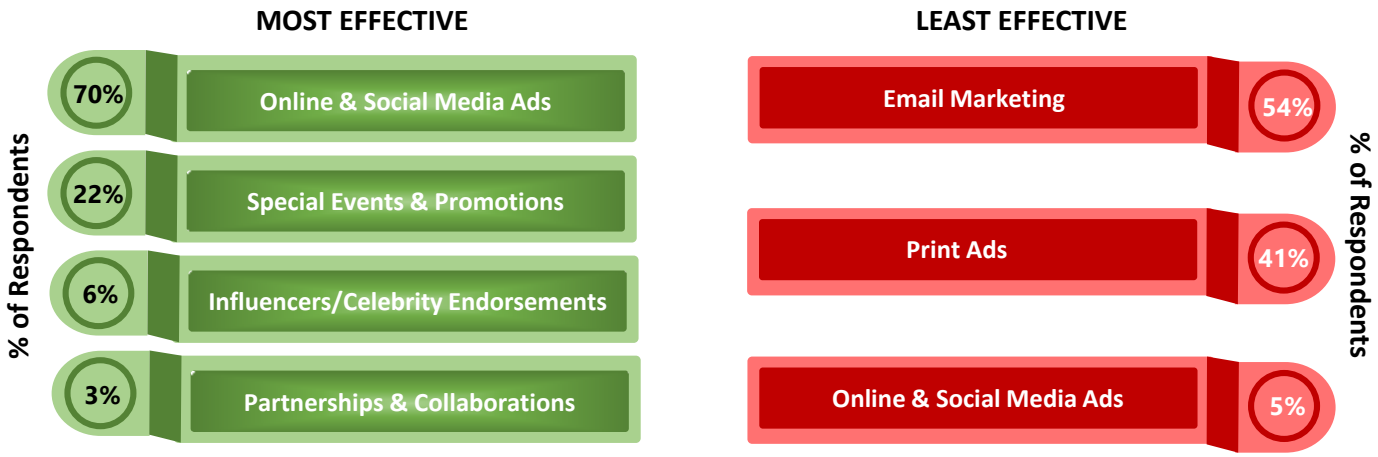


MARKETING TRENDS AND BENCHMARKS

% OF ANNUAL REVENUE ALLOCATED AS MARKETING BUDGET



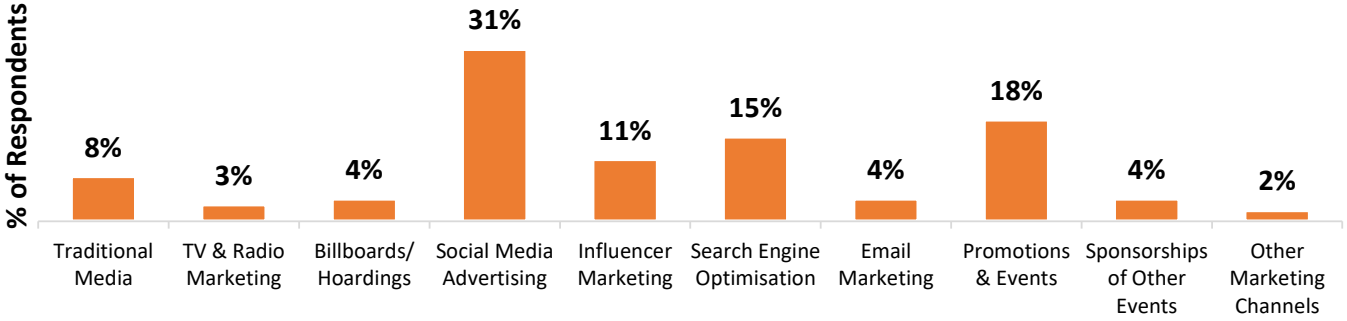
EFFECTIVE STRATEGY TO REACH TARGET AUDIENCE



Online & Social Media Ads stand out as the most effective strategy (70%). Email & Print Marketing are viewed as the least effective by most respondents.

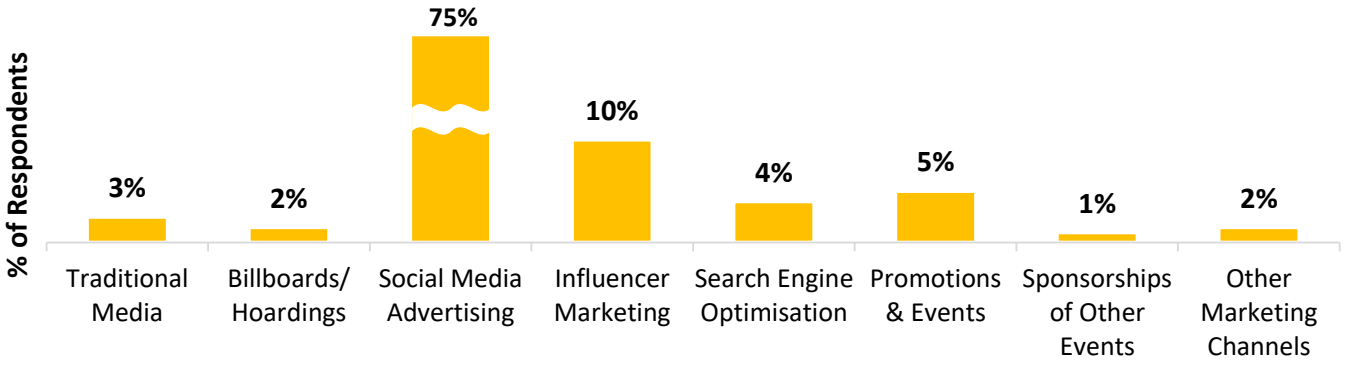
WHERE IS THE MARKETING BUDGET SPENT?

TYPICAL MARKETING SPEND BY FECs



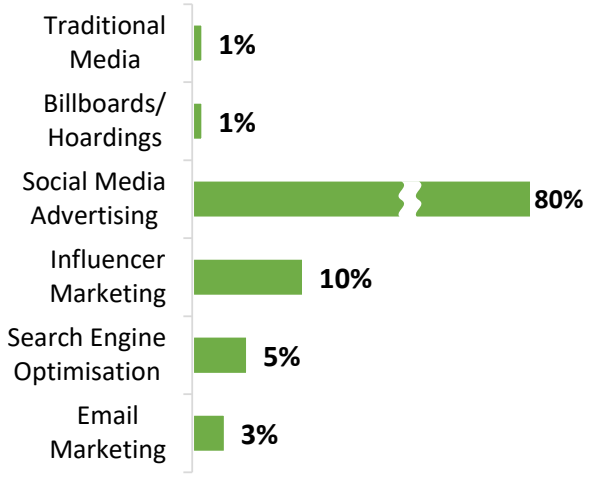
FEC Operators tend to spread their marketing budget across multiple channels including Events & Promotions and SEO Optimization

TYPICAL MARKETING SPEND BY PARTICIPATORY PLAY AREAS

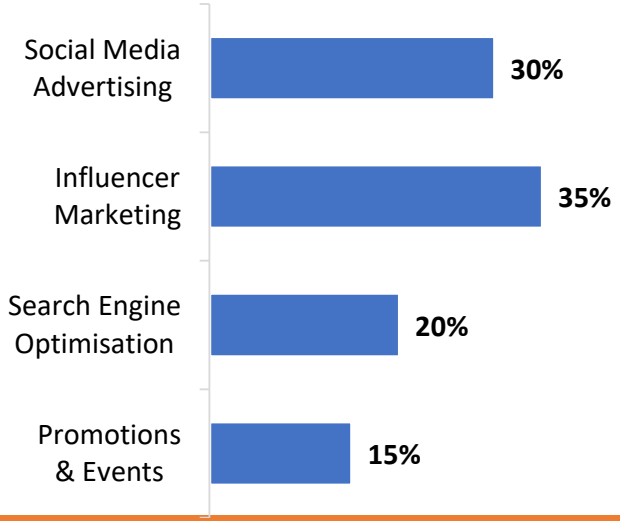


Social Media Advertising accounts for majority of marketing spend with Participatory Play Area Operators (75%)

TYPICAL MARKETING SPEND BY THEME PARKS



TYPICAL MARKETING SPEND BY WATER PARKS



Theme Parks allocate 80% of their marketing spend to Social Media Advertising, showcasing a highly focused digital strategy, while the highest share of marketing spend by Water Park Operators goes to Influencer Marketing followed by Social Media Advertising.

Traditional media includes print media; social media advertising includes Facebook, Instagram, TikTok, YouTube; Search Engine Optimisation includes Google Ads, SEM

NOTE: Based on the responses received, average of percentages was calculated for analysis. As we did not have many responses for Theme Parks & Water Parks, the data need not accurately represent the spend patterns of the MENA Leisure Industry

SOCIAL MEDIA TRENDS

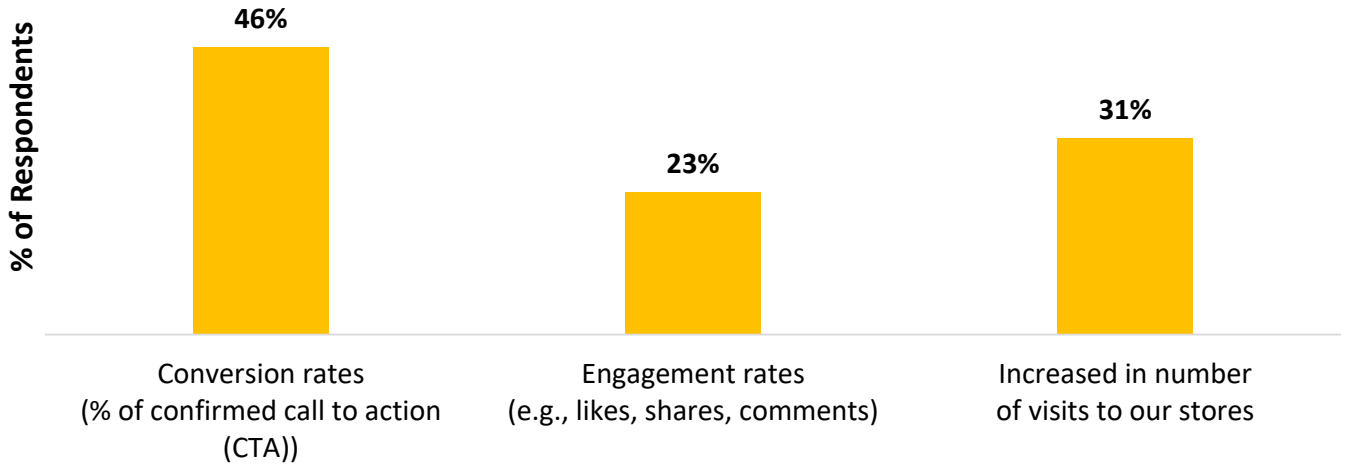


56% of MENA entertainment facilities rate Influencers collaborations to be very effective & 28% as moderately effective.

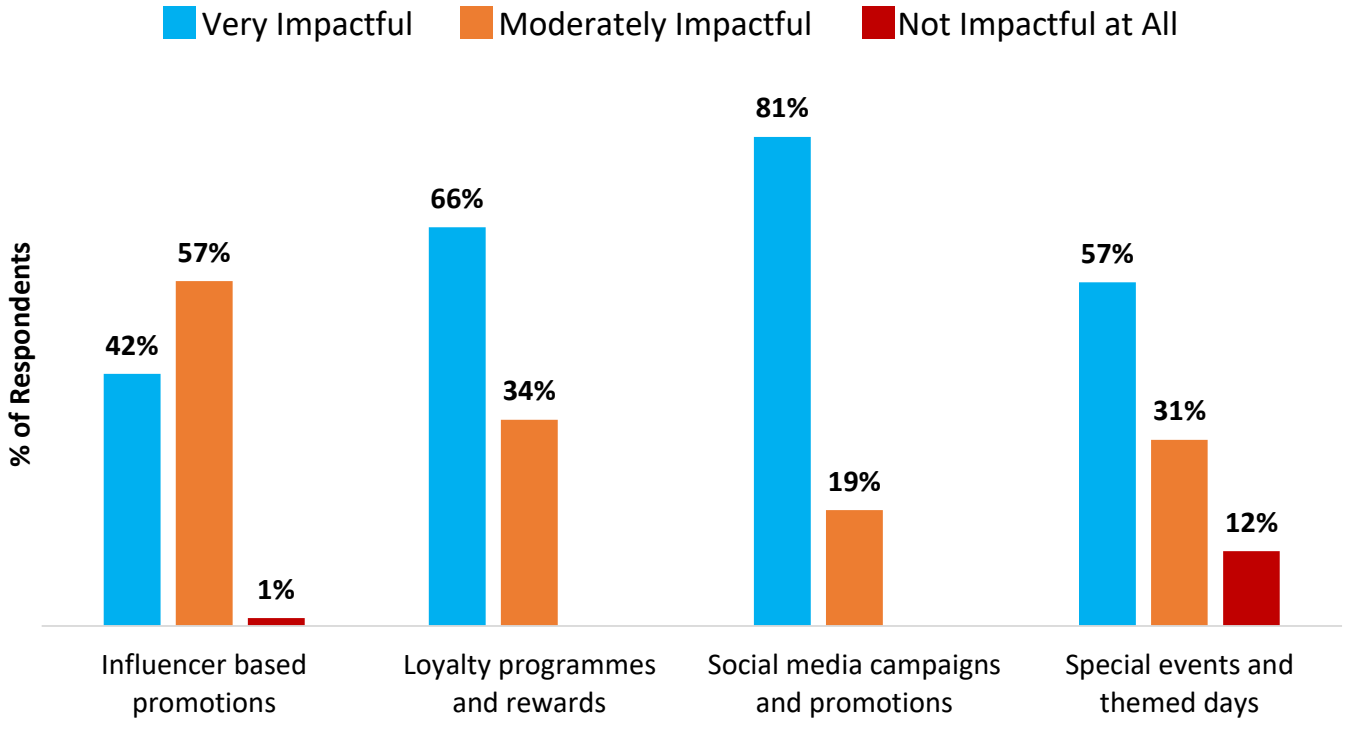


Across the MENA region, Instagram is the most preferred platform for brand marketing. However, preferences vary by country. Egypt favours Facebook, while Saudi Arabia leans towards TikTok.

METRIC TO MEASURE SOCIAL MEDIA CAMPAIGN SUCCESS



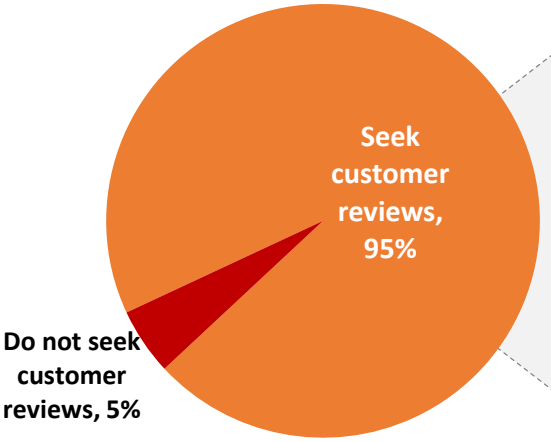
IMPACTFUL PRACTICES FECs & PARTICIPATORY PLAY AREA BUSINESS



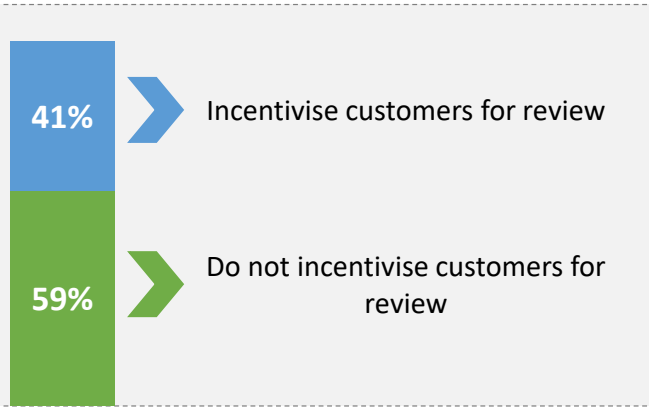
Most of the FECs & Participatory Play Area considers Social media campaigns and loyalty programmes & rewards to be the most impactful practices for their business.

CUSTOMER REVIEWS TRENDS

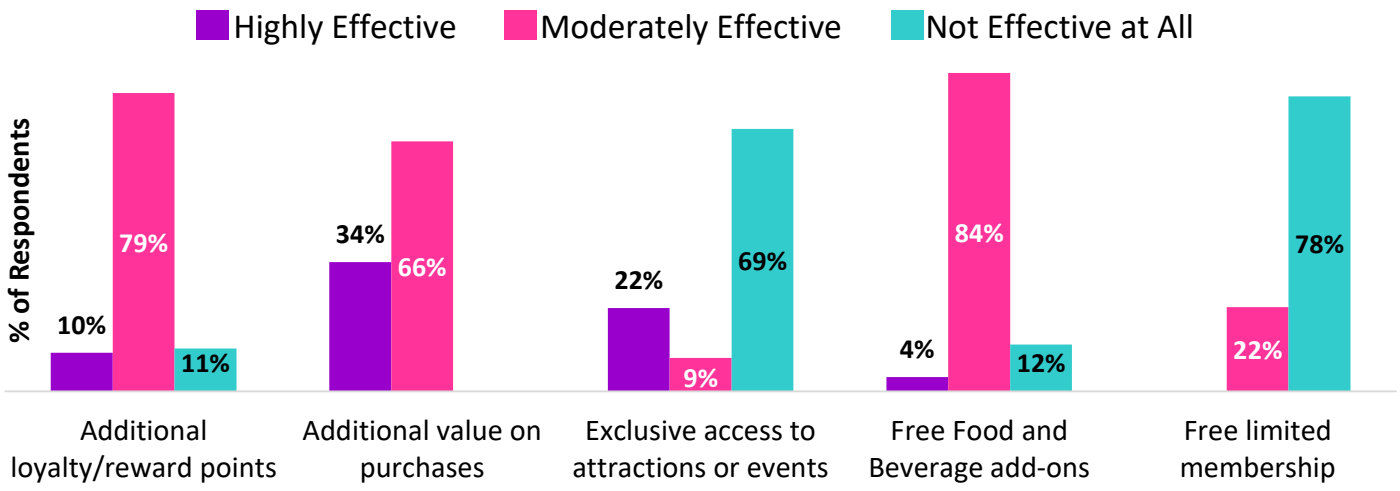
OPERATORS SEEKING REVIEW ON REVIEW PLATFORMS



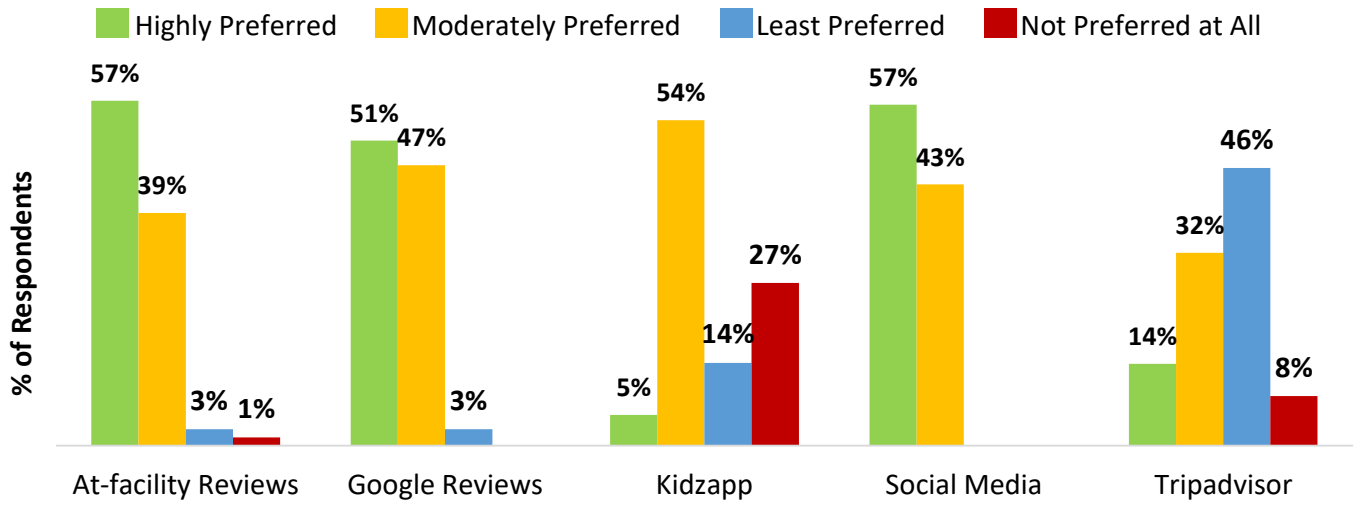
OPERATORS INCENTIVISING CUSTOMERS FOR REVIEWS



TYPES OF INCENTIVES OFFERED FOR CUSTOMER REVIEWS BY FECs & PLAY AREAS

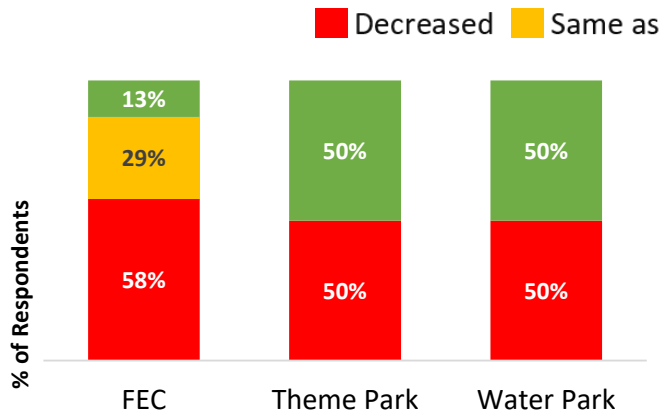


MOST PREFERRED CUSTOMER REVIEW PLATFORMS



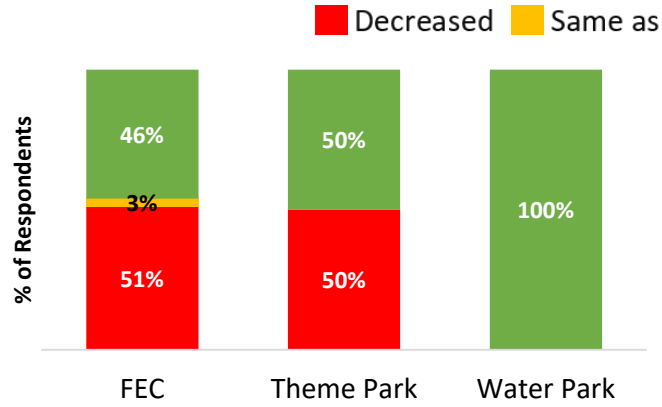
CEOs INSIGHTS ON BUSINESS TRENDS IN 2024 VS 2023

REVENUE GROWTH TRENDS – 2024 vs 2023



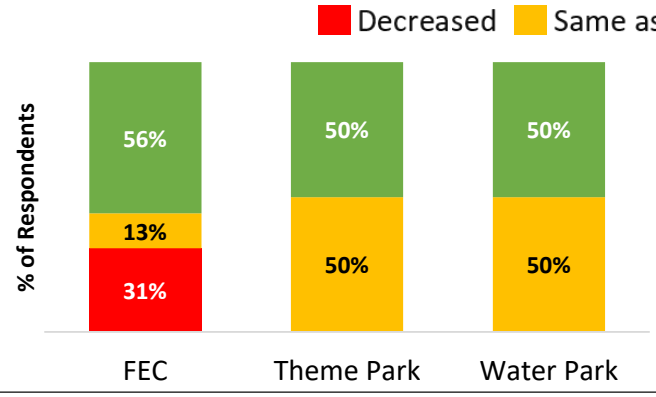
Y-O-Y business growth was most impacted for FECs, with 58% of CEO respondents reporting a drop in revenue.

ANNUAL CUSTOMER TRANSACTION TRENDS - 2024 vs 2023



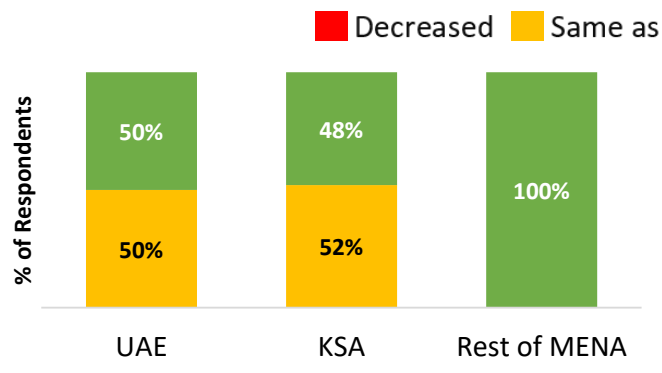
46% of FECs, 50% of Theme Park and 100% of Water Park respondents reported an increase in customer transactions in 2024.

AVERAGE SPEND PER TRANSACTION TRENDS - 2024 vs 2023



Spend per transaction increased or remained the same for majority of the respondents. However, 31% of FEC respondents reported a decrease in average customer spend.

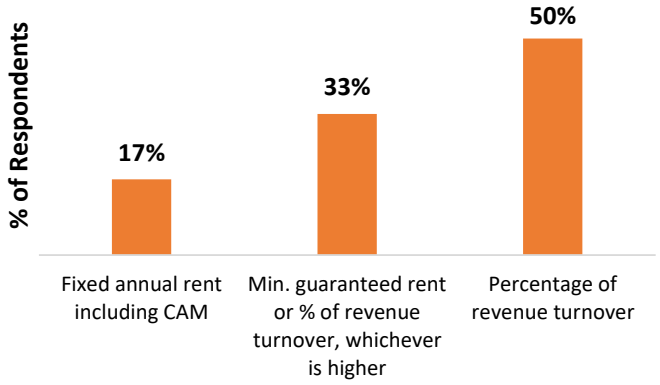
NEW STORE OPENING TRENDS- 2023 vs 2024 (FECs & Participatory Play Areas)



Saudi Arabia and UAE respondents reported an increase in the number of new FECs or Play Areas.

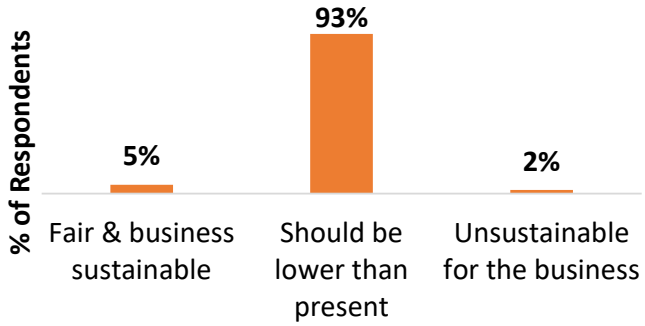
CEO's OPINION ON FACILITY LEASE & OPERATING COSTS

MOST PREFERRED LEASE/RENT MODEL BY FECs & PARTICIPATORY PLAY AREAS



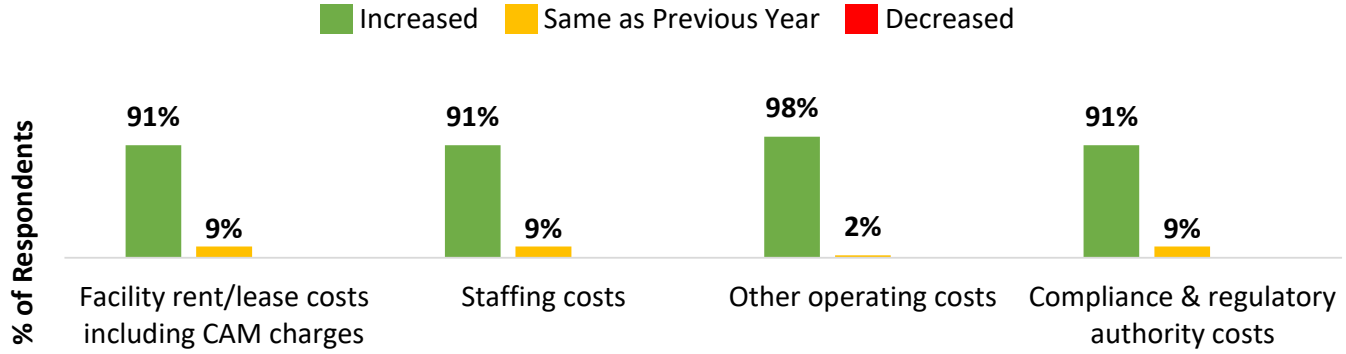
17% of FEC & Participatory Play Area operators prefer fixed annual rent as their lease/rent model of choice.

CEO OPINION POLL ON LEASE/RENT COST FOR FECs & PARTICIPATORY PLAY AREAS



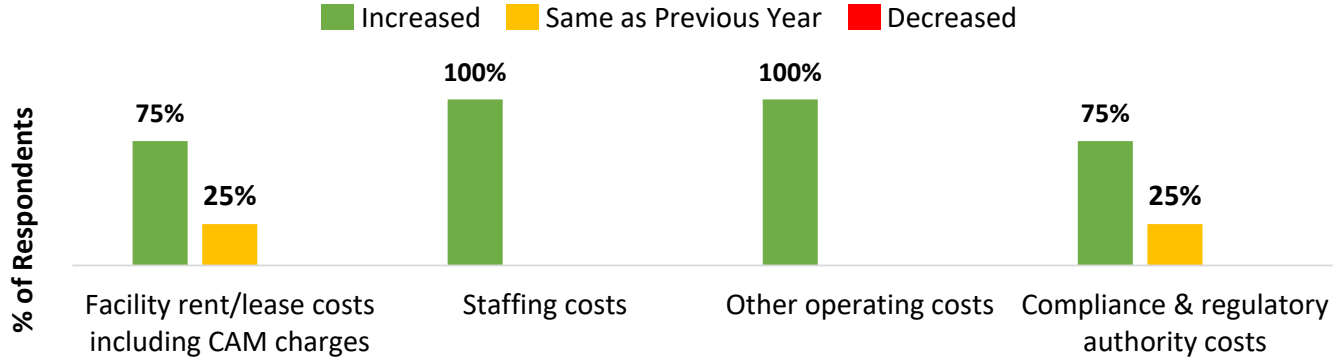
93% of FEC & Participatory Play Area operators feel present lease/rent costs are high and should be lower.

OPERATING COST TRENDS - FECs & PARTICIPATORY PLAY AREAS INDUSTRY 2024 vs 2023



90+% of the FEC & Play Areas CEOs and 75+% of Theme Park & Water Park CEOs feel that operating costs for leisure operations has increased in 2024 as compared to 2023.

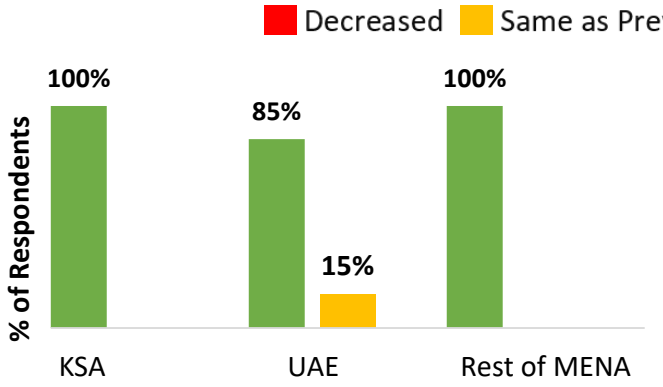
OPERATING COST TRENDS - THEME PARKS & WATER PARKS INDUSTRY 2024 VS 2023



Note: CAM: Common Area Maintenance

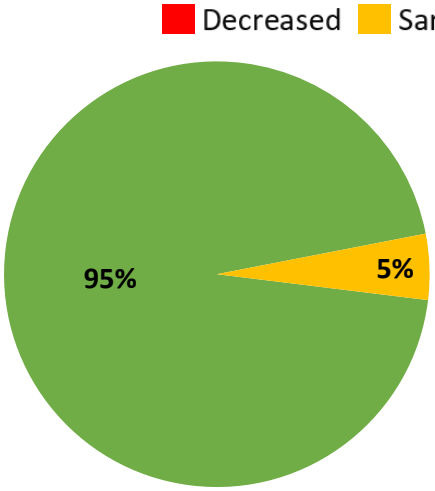
CEOs INSIGHTS ON BUSINESS TRENDS IN 2024 vs 2023

BUSINESS COMPETITION TRENDS 2024 vs 2023



CEOs all across the MENA region have highlighted that competition in the leisure business has increased year on year.

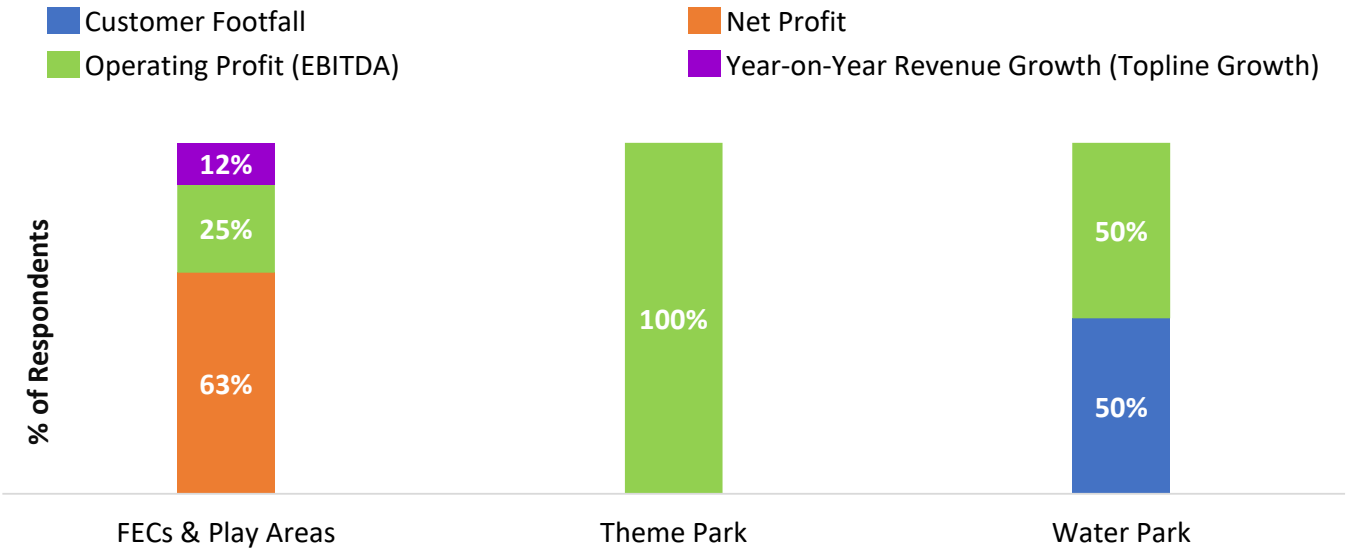
TRENDS IN DEMAND FOR NEW ATTRACTIONS



With increasing competition, demand for unique and new attractions has increased too.

SUCCESS MEASUREMENT METRIC

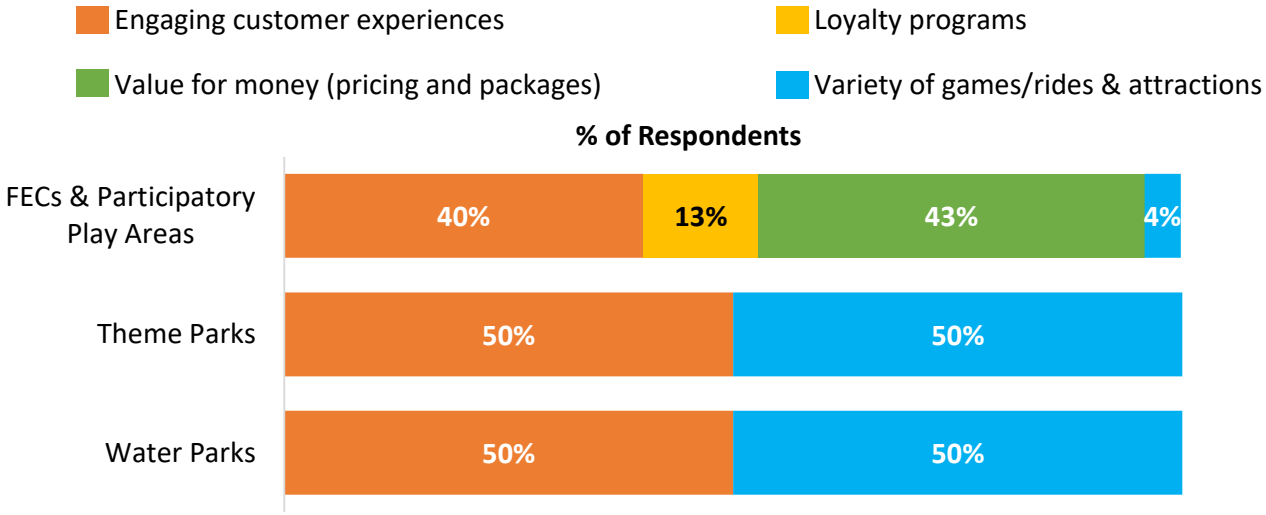
MOST IMPORTANT SUCCESS MEASUREMENT METRIC FOR CEOs



FECs & Participatory Play Areas consider net profit as most important financial indicator to assess success, while Theme Parks are completely focused on operating profit & Water Parks consider customer footfall & operating profit equally.

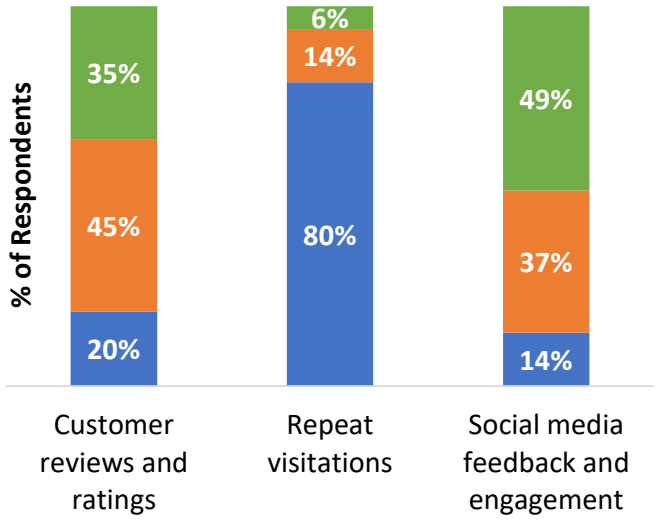
CEO's OPINION ON CUSTOMER EXPERIENCE TRENDS

METRIC FOR DRIVING CUSTOMER LOYALTY

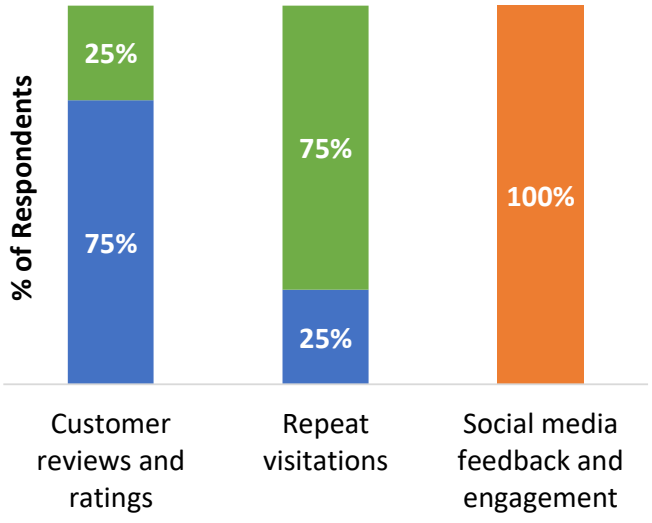


Value for money is the leading driver of customer loyalty across FECs & Participatory Play Areas. However, Theme Parks & Water Parks place equal emphasis on engaging customer experiences & attraction variety.

PREFERRED CUSTOMER SATISFACTION METRIC – FECs & PARTICIPATORY PLAY AREAS



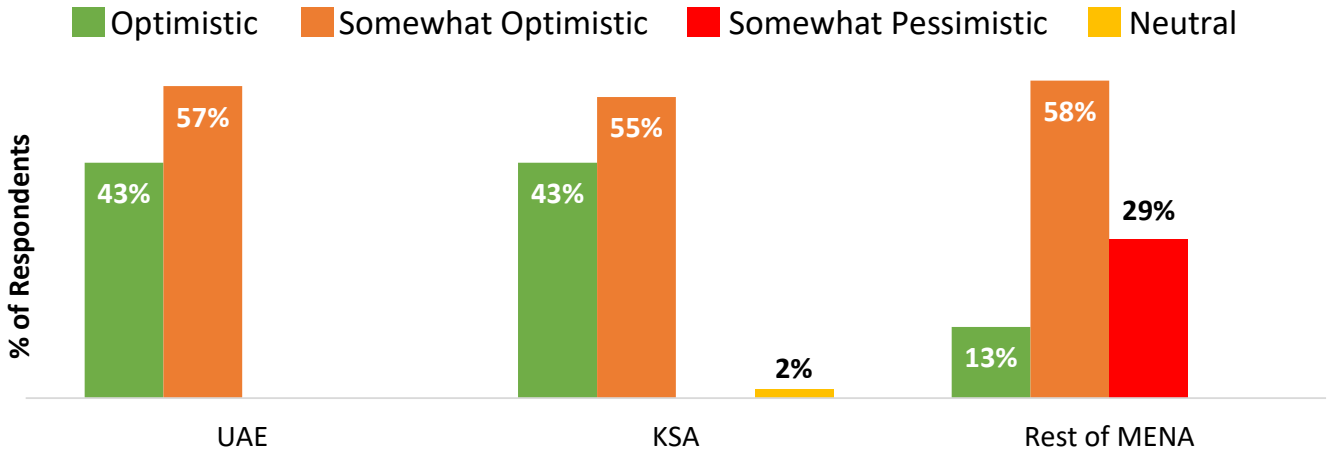
PREFERRED CUSTOMER SATISFACTION METRIC – THEME PARKS & WATER PARKS



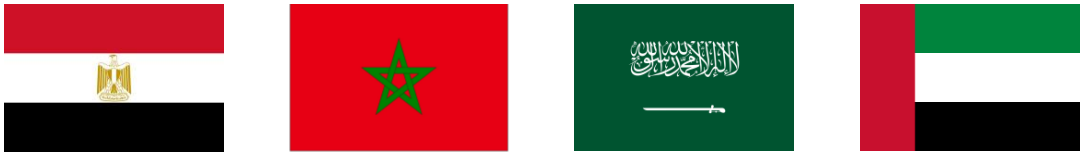


The data shows that FECs & Participatory Play Areas consider repeat visitations as the most preferred indicator of customer satisfaction, while Theme Parks & Water Parks rely on reviews, ratings & social media engagement as main customer satisfaction metric.

CEOs OPTIMISM ON LEISURE & ENTERTAINMENT INDUSTRY GROWTH



TOP 4 COUNTRIES WITH HIGH GROWTH POTENTIAL FOR LEISURE & ENTERTAINMENT



EGYPT | MOROCCO | SAUDI ARABIA | UAE

BUSINESS EXPANSION PLANS - FECs & PARTICIPATORY PLAY AREAS



57%

of Saudi operators intend to expand their business in in 2025



34%

of UAE operators intend to expand their business in 2025



5%

of Kuwait operators intend to expand their business in 2025



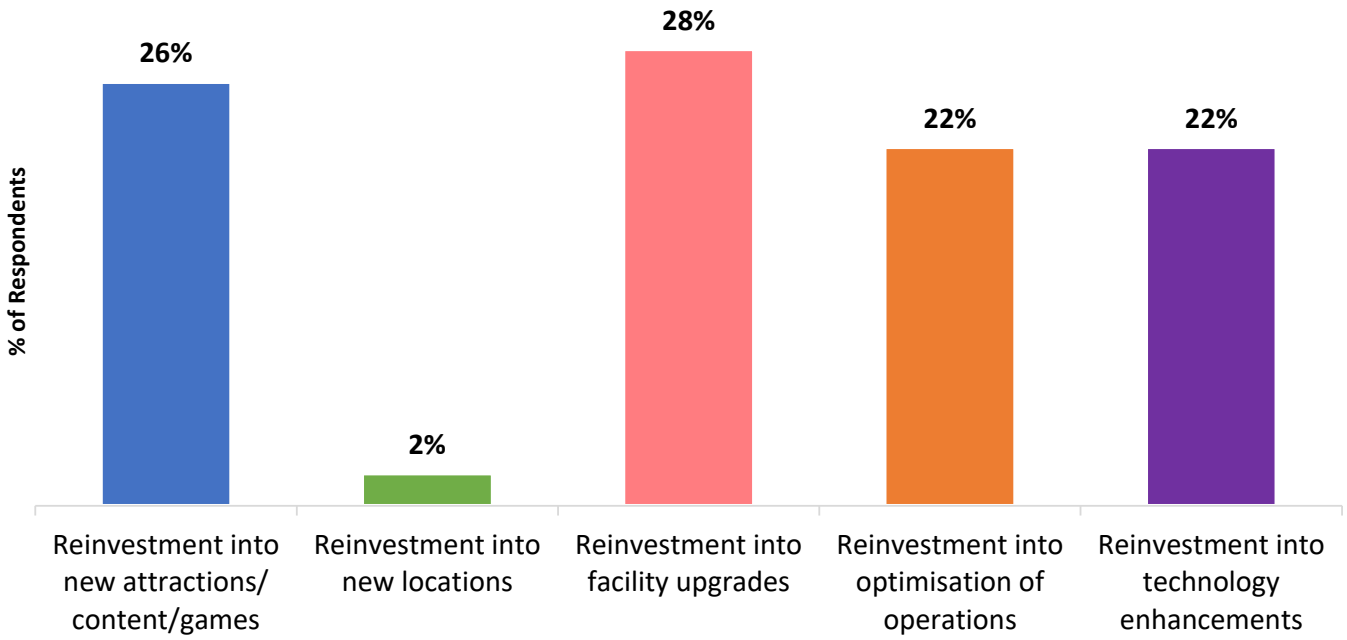
4%

of Egypt operators intend to expand their business in 2025

57% of FECs & Participatory Play Areas respondents from KSA intend to expand their business, while 100% respondents from Theme Parks & Water Parks indicate expansion plans within UAE.

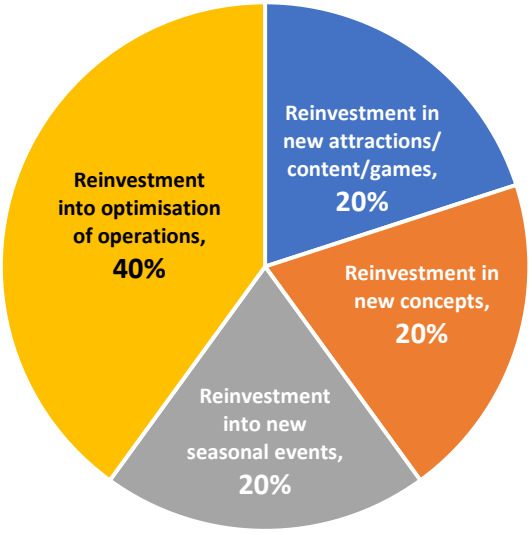
REINVESTMENT PLANS

REINVESTMENT PLANS IN 2025-2026 – FECs & PARTICIPATORY PLAY AREAS

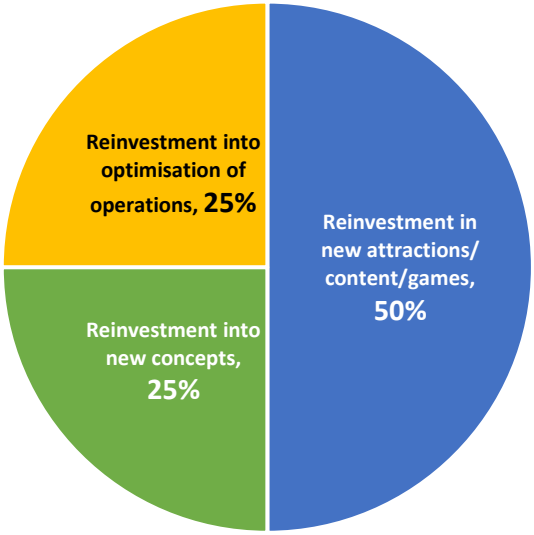


FEC & Participatory Play Area respondents show significant appetite to reinvestment into upgrade of their existing operations.

REINVESTMENT PLANS IN 2025-2026 – WATER PARK



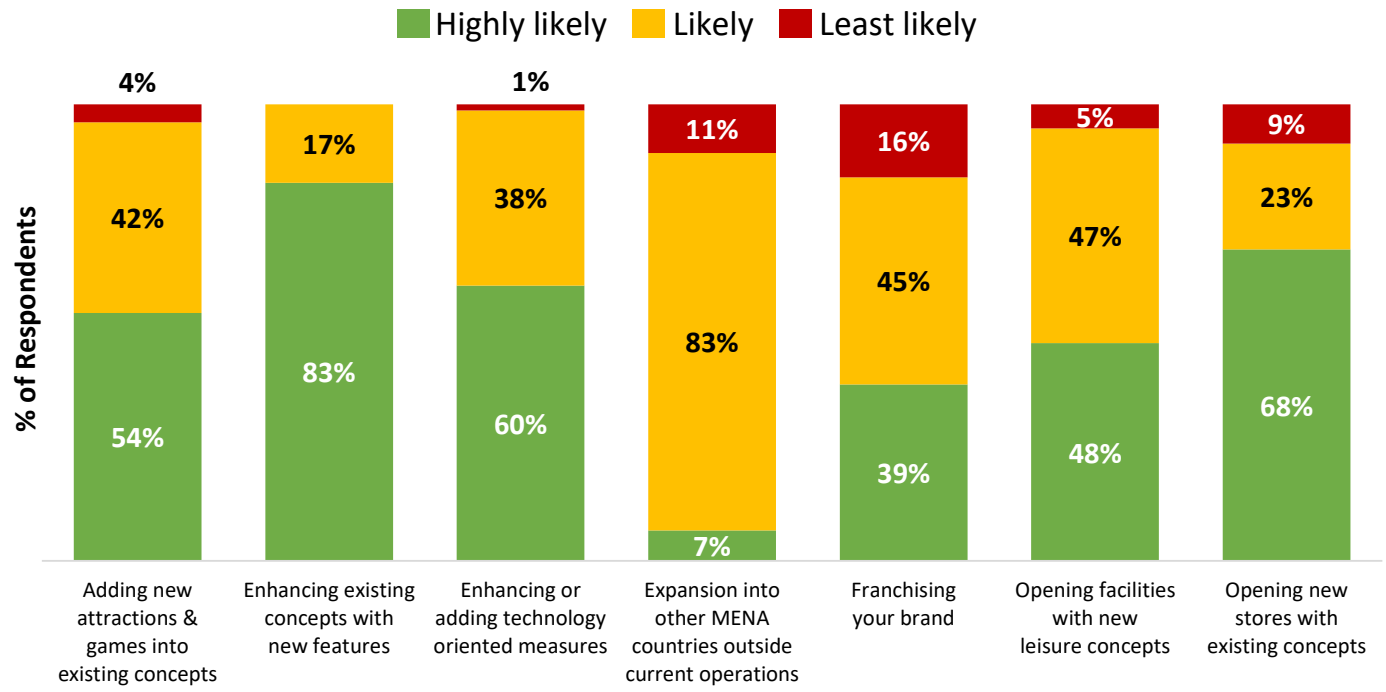
REINVESTMENT PLANS IN 2025-2026 – THEME PARK



Theme Park respondents are prioritising reinvestment into new attractions whilst Water Park operators are focusing their reinvestment on optimisation of operations.

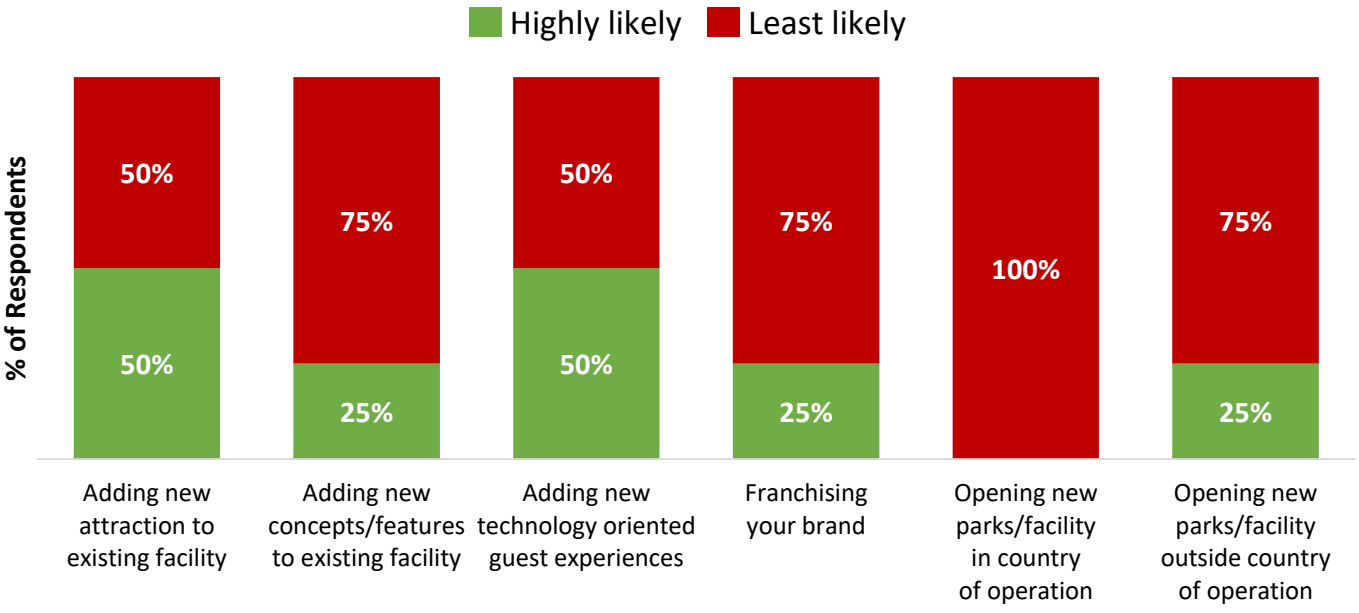
BUSINESS EXPANSIONS & DIVERSIFICATION TRENDS

INVESTMENT TRENDS FOR NEXT 5 YEARS – FECs & PARTICIPATORY PLAY AREAS



Diversification over the next 5 years within FEC & Participatory Play Areas operations is strongly focused on enhancing existing concepts with new features & opening new stores with existing concepts.

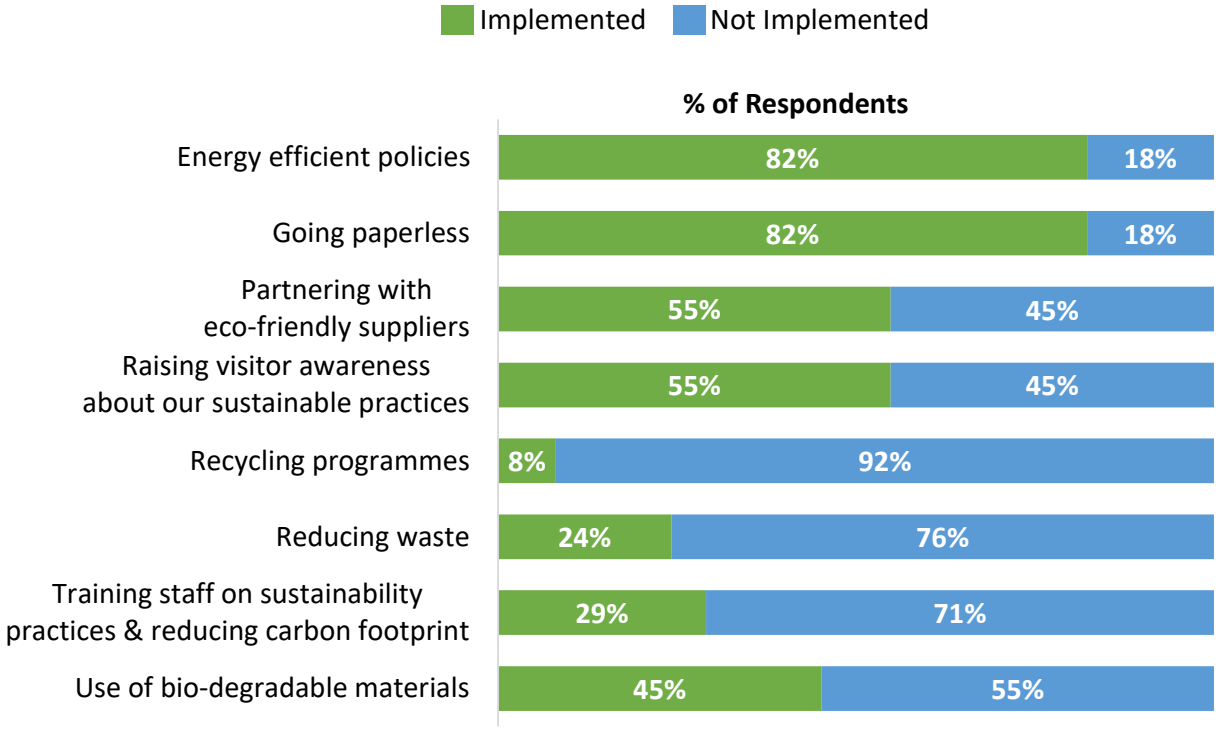
DIVERSIFICATION TRENDS FOR NEXT 5 YEARS – THEME PARKS & WATER PARKS



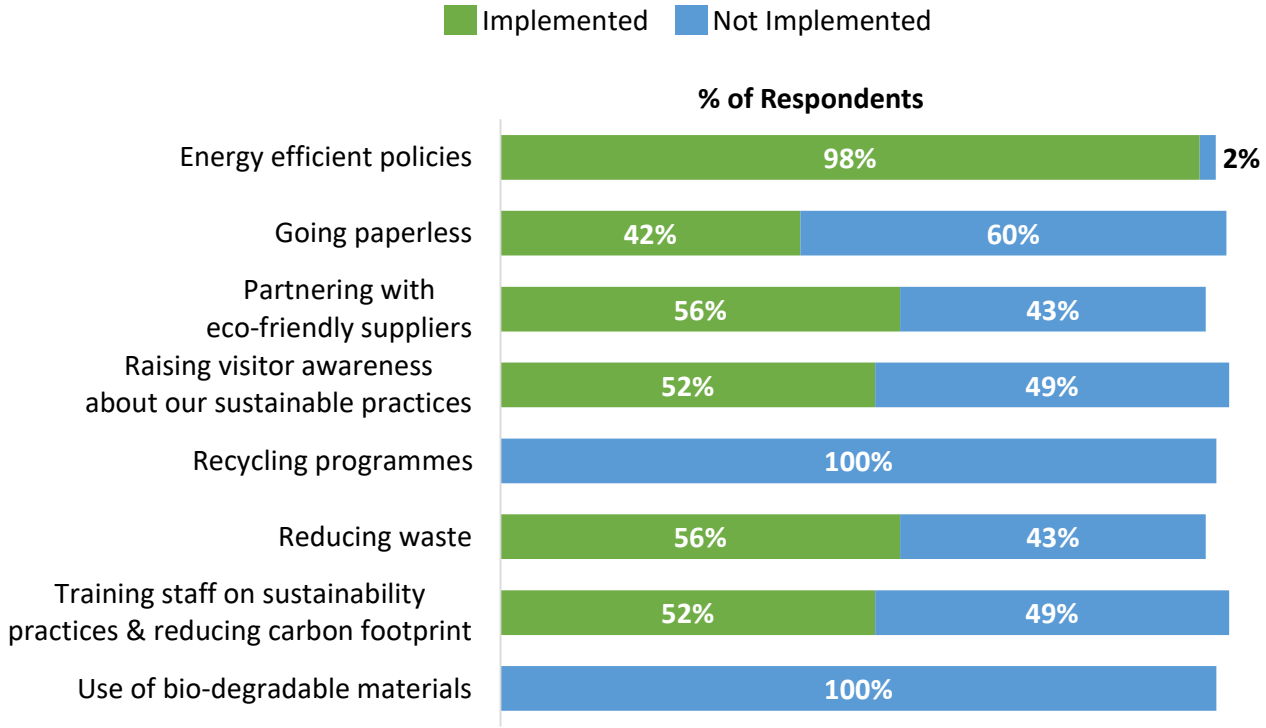
NOTE:
**Adding new attraction to existing facility - such as addition of more rides/exhibits*
** Adding new concepts/features to existing facility - such as new themed area with attractions*

Theme and Water Parks plan to diversify mainly by adding new attractions to existing facilities & adding new technologies to enhance guest experience.

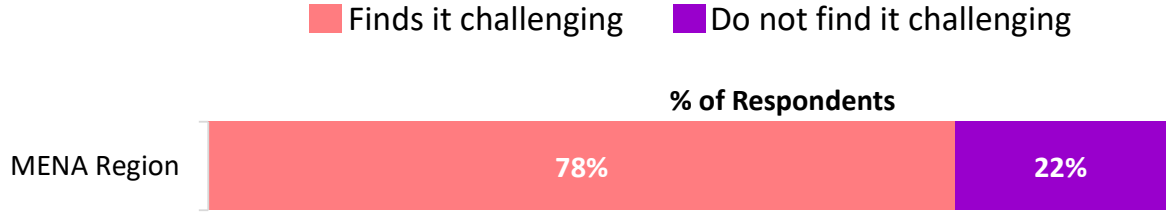
SUSTAINABLE INITIATIVES BY FECs & PARTICIPATORY PLAY AREAS IN UAE



SUSTAINABLE INITIATIVES BY FECs & PARTICIPATORY PLAY AREAS IN KSA



HOW CHALLENGING IS IMPLEMENTING SUSTAINABILITY INITIATIVES?



مجلس الشرق الأوسط وشمال أفريقيا للترفيه والجذب السياحي
Middle East and North Africa Leisure & Attractions Council

The Middle East and North Africa Leisure and Attractions Council (MENALAC) is a not-for-profit trade association representing the Leisure, Entertainment and Attractions (LEA) industry across the MENA region – one of the most dynamic and rapidly growing economic sectors.

Established in 2016 under the auspices of the Dubai Chamber of Commerce and Industry (DCCI) and the Dubai Association Centre, MENALAC was formed through a collaborative effort of leading industry players – including theme parks, amusement parks, family entertainment centres (FECs) and major attraction operators who united to create a dedicated platform to support and advance the industry.

A Council created by the industry, for the industry, MENALAC serves as a unified voice for the sector, working to enhance communication among stakeholders, advocate for industry interests and collaborate with policymakers to develop forward-looking, growth-oriented regulatory frameworks.

MENALAC's overarching vision is to bring together a diverse set of stakeholders including operators, manufacturers, suppliers, distributors, consultants, tourism boards and government authorities on a common platform to promote collaboration, raise standards and establish a harmonised code for the region's leisure and attractions sector.

Its membership base encompasses a wide spectrum of industry participants such as:

- Operators of theme parks, amusement parks and FECs
- Destination developers and attraction operators
- Industry suppliers and service providers
- Manufacturers and technology innovators
- Consultants and industry specialists.

Aims & Objectives

- To promote safe operation, regional development, professional growth and commercial success of the amusement industry.
- To be an indispensable resource for the Council's members and an international authority for the attractions industry.
- To advocate on behalf of the members among consumers, government officials and the media.
- To provide market connections between buyers and suppliers through events and gatherings.
- To be an allied partner with state, regional and national industry associations.
- To be a credible resource for industry data and statistics.
- To pursue appropriate purposes and objectives that are approved by the Board of Directors.
- To provide continuing education and training in amusement facility operations.

Membership & Benefits

Since its inception, MENALAC has experienced consistent and encouraging growth in its membership base, rising from 31 members in 2017 to 145 members in 2024. These members collectively represent over 850 operational sites and more than 300 brands across the MENA region, underscoring MENALAC's expanding footprint and influence within the regional leisure and attractions industry.

Membership in MENALAC offers industry stakeholders an invaluable platform to explore emerging opportunities, enhance professional networks and actively participate in a wide range of educational, networking and industry-specific initiatives. Members benefit from access to exclusive resources and events that support both business development and industry advancement.

Some of the reasons to join MENALAC are:

- Access to an influential network of key players within the MENA leisure and attractions sector
- Preferential entry to educational conferences, webinars, events and certified training programmes
- Opportunities to participate in international and regional trade delegations, exhibitions, conferences and study tours as MENALAC delegates
- Access to credible, region-specific industry data and insights
- Industry-wide unified safety and HSE (health, safety and environment) standards and guidelines
- Regular updates through e-newsletters and e-alerts on regional and global sector developments
- Opportunities to contribute to industry dialogue via active participation in committees and sub-committees
- Visibility through inclusion in the MENALAC Membership Directory and promotion of new members via MENALAC's social media platforms
- Member access to the prestigious MENALAC Awards and various social and networking events at preferential rates
- Reciprocal benefits through collaboration with international trade associations
- Preferential advertising rates in MENALAC's publications and communication platforms
- Editorial contributions in the Council's monthly newsletter.

To ensure inclusivity across the spectrum of industry stakeholders, MENALAC offers four categories of memberships: Benefactor Members, Operator Members, Manufacturer & Supplier Members and a category for Consultants, Consulting Firms and Honorary Members.
MENALAC remains committed to fostering collaborative engagement between industry stakeholders and regulatory bodies. It plays an active role in shaping dialogues that promote informed regulatory frameworks and policies,

while simultaneously supporting business growth and raising the global profile of the MENA leisure and attractions industry.

MENALAC's communication channels have also seen significant growth. From fewer than 100 followers on LinkedIn in 2017, the Council's online community now exceeds 2,200. Similarly, the subscriber base for the monthly MENALAC Newsletter has expanded from under 50 to over 2,500, reflecting the increasing relevance and reach of its content.

MENALAC Events & Initiatives

Each year MENALAC has an impressive Calendar of Events.

MENALAC Events are the pulse of the MENA leisure and attractions industry, where innovation meets opportunity and where industry leaders and innovators converge. By gathering the brightest minds and most influential leaders, MENALAC creates an environment that drives the industry forward. These events are more than just meetings—they are platforms where challenges are addressed, cutting-edge trends are unveiled, and the achievements of our sector's pioneers are celebrated. Each gathering is a high-impact arena that fosters strategic connections, inspires collaboration, and propels businesses to new heights.

The MENALAC Events include Industry Conferences, Educational Webinars, Networking Events, Annual Industry Award night, Focus on Country Events and Fun Mingles. Our events are more than just gatherings—they're platforms for progress, where industry leaders and top stakeholders come together to shape the future of our dynamic regional leisure and entertainment sector. MENALAC Events Inform, Educate, Connect, Explore, Celebrate, and Elevate the Industry.

From founders to C-Level executives, the industry's most powerful voices converge here, making MENALAC Events the cornerstone of growth and excellence in the region.

Key characteristics of MENALAC events:

- **Headlined by the Industry's Best:** Our stages are graced by top-tier industry stalwarts, visionary authorities, and thought leaders who shape the future of the MENA leisure and attractions landscape.
- **Packed to Capacity:** With a reputation for running full houses, our events consistently draw significant attendance, underscoring their value and appeal.
- **A Gathering of Power Players:** Our audience is a who's who of the industry—Owners, Investors, C-level, Executives and Senior Management from leading regional operators, alongside global manufacturers, suppliers, consultants, and service providers.
- **Benchmarking Excellence:** The MENALAC Awards Gala stands as the pinnacle of industry recognition, the only event that honors exceptional achievements and sets the gold standard for excellence in the MENA Leisure and Attractions Industry.



MENALAC Awards 2024 Winners

BOARD MEMBERS 2025-2026



Alwalid Al Baltan
President
Chairman & Founder
Rafeeh Entertainment Group, KSA



Silvio Liedtke
Vice President
CEO, Landmark Leisure, UAE



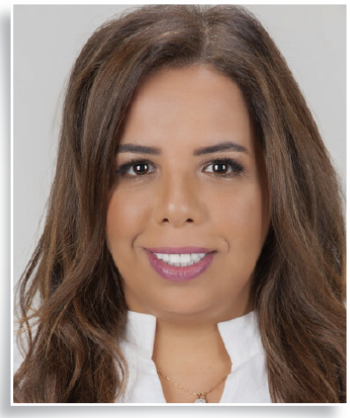
Fahad Al Obailan
Board Member
Group CEO, Baan Holding, KSA



Kareem Fayed
Board Member
General Manager Entertainment
Operation, Al Othaim Entertainment, KSA



Peter Stubbs
Board Member
Vice President - Technical Services
Project Delivery | Sustainability
Majid Al Futtaim - Entertainment, UAE



Sheikha Monira Al Sabah
Board Member
CEO, Play Enterprises, Kuwait



Shifa Yusuffali
Board Member
CEO, Ideacrate Edutainment, UAE



Antoine Zgheib
Board Member
Director, Saudi Entertainment
Venture (SEVEN), KSA



Hussain Abdul Fatah Marafi
Board Member
CEO, Fun Zone (HM International
Holding), Kuwait

BOARD MEMBERS 2025-2026



Mohammed Alhinai
Board Member
Managing Director, FunZone
Oman



Ahmed Yusuf
Board Member
CEO, Seef Properties B.S.C.
Bahrain



Ahmad Kamel
Board Member
CEO, Fawasel Advanced for
Entertainment and Tourism, KSA



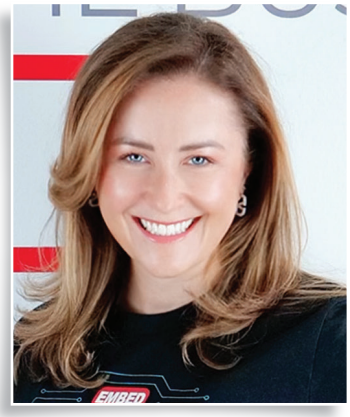
Hassan Ahmed
Board Member
Executive Director, Adventure
World Entertainment, KSA



Prakash Vivekanand
Board Member
Founder & Managing Director,
The Zone Amusement Arcade, UAE



Dr. Janardana Dattakumar
Board Member
Treasurer- MENALAC
Director of Operations,
Antic's Land, UAE



Renée Welsh
Board Member
Chief Executive Officer
Embed & Booking Boss, UAE



Davide Camaiora
Board Member
Managing Director,
Vivaticket, UAE

COMMITTEE MEMBERS

EVENTS COMMITTEE

Our Events Committee is focused on creating events that serve in the best interest of our members. With the aim of all our events being a good balance of options for our members to participate in such as Conferences, In Country Focus Events, Educational Webinars and of course our highly acclaimed Awards Gala. We encourage our members to actively take part in the events our committee deliver to take advantage of the multiple opportunities provided for them to raise the profile of the brands, take part in knowledge sharing, be part of excellent networking opportunities and ensure they are seen at the only event the MENA region offers for recognition of achievements and new products this being the MENALAC Awards Gala.

Davide Camaiora
Head - Events Committee
MD, VivaTicket

Mike Rigby
GM & RVP - Middle East & India
Whitewater

Dr. Janardana Dattakumar
MENALAC Treasurer
Director of Operations, Antic's Land

Ghassan Assi
COO, Trampo Extreme

Prakash Vivekanand
Founder & Managing Director
The Zone Amusement Arcade

Chris Swartz
Executive Director Attractions
Saudi Entertainment Ventures, SEVEN

David Sandstrom
Vice President, International Sales
Bob's Space Racers

Gerard Slenders
Vice-President
Intamin Amusement Rides Int. Corp. Est

Hind Galadari
Deputy General Manager
Miral Experiences

Valeria Rizzo
Business Development Director, Red Raion

Ammar Motan
CEO, Onederland

Hamza Koya
Senior Marketing Manager
Ideacrate Edutainment

Mawlid Ben Mansour
VP MENA, Wibit

Mohamed Attia
CEO, Ground Control Entertainment

Kareem Fayed
General Manager Entertainment Operation, Al Othaim Entertainment

HSE COMMITTEE

Promote the standardization of safe operations for the amusement industry across MENA by advising & liaising with Government & Regulatory Bodies and working with our members to achieve the highest standards of safety for both their guest and employees. This committee is dedicated to the production of our Minimum Standards Playbook a reference book with up-to-date advice and suggestions on the safe operation of a venue, delivering safety-focused webinars, contributing to the MENALAC newsletter with our "Safety Talk" column and knowledge sharing at networking events.

Ryan Phillips
MENALAC HSE Committee Chairperson
General Manager - Water Park Profun,
Grand Hyatt Dubai

Chris Napier
MENALAC HSE Committee Vice Chairman
Global Safety & Talent Development Director
Mellors Entertainment, Riyadh

Peter Stubbs
Director of HSE
Majid Al Futtaim Leisure, Entertainment & Cinemas

Ralph Pesgens
Global Head of CC Amusement Parks & Leisure Industry, TUV NORD

Alex Schrott
Head of Amusement Rides & Structures
Middle East, TÜV SÜD

Shady Mohamed
Operations Manager
Adventureland

Rahul Manohar Rahalkar
Bu Manager
Al Othaim Entertainment

Mohammed Ashraf Mohammed
HSE Manager
Doha Oasis Quest

Vinod Chandar
Quality Health & Safety Manager
Baan Holding

Steven Putzeys
Business & Operations Manager
M.H. Alshaya Leisure & Entertainment

Mauritz Christiaan Janeke
Director of HSE
Miral Experiences

Kathryn O'Sullivan (CMIOSH)
Multidisciplinary Health & Safety Professional
Miral Experiences,
Chartered Member of IOSH

Jessica Lee Davis
Senior Manager, HSE
Miral Experiences

Paul Slater
Executive Director - QHSE
Saudi Entertainmet Ventures

Anshu Kheda
Health & Safety Manager
Landmark Leisure

Daniel Schoppen
VP Design & Development
Intamin

Wael Al Katergi
Executive Manager
Fun Zone Oman

Marius De Venter
Director, Health & Safety
Atlantis, Dubai

Emma Janes Forrest
Project Manager – Business Operations, EventLab

Louie Logramonte
Centre Manager
Orange Wheels

COMMITTEE MEMBERS

MANUFACTURERS & SUPPLIERS COMMITTEE

Representing all our Manufacturer and Suppliers, this committee is dedicated to raising their profile and visibility, in addition to working with local authorities across the MENA region to help facilitate the sharing of information and clarify government requirements for these members. The M&S Committee also contributes actively to our newsletters through the "Vendor Talk" column.

Renée Welsh
Head - M&S Committee
CEO, Embed & Booking Boss

Andrea Munari
President
I.E. Park Soli Bumper Cars

Reinhart Viane
Business Development Director
KCC Entertainment Design

Mark Richardson
International Sales Manager & UK Sales
Bandai Namco

Jack Tunstall
Project Sales Engineer
Severn Lamb

Daniel Jackson
Principal, Master Planning
ProSlide Technology Inc

Jakub Kondelka
Head of the Marketing & Communication
RIXEN Cableway

Sean Stepowany
Safety Skills Training Worldwide DMCC

Gabi Salabi
Managing Director Projects
Triotech

Julie Kline
Director Sales & Marketing
Aquatic Development Group

Paul Collimore
Commercial Director
SPREE Interactive

David Sandstrom
VP, International Sales
Bob's Space Racers

Reddy JS
VP /Business Head – Middle East
Semnox Solutions

Alex Schrott
Head of Amusement Rides & Structures
TUV SUD

Alberto Borrero
VP International Marketing & Sales
Intercard

MEMBERSHIP COMMITTEE

Our Membership Committee are the key to forward planning and developing new ideas and incentives for the continued development and growth of our association membership pool. This committee is focused on improving member benefits, communicating with prospective members and helping them to understand how they will gain by becoming members and they are also active in supporting MENALAC to manage our aims in continually offering more support and opportunities for introductions to key players in the market for all our members.

Shifa Yusuffali
Committee Head
CEO, Ideacrate Edutainment

Kareem Fayed
General Manager Entertainment
GCC, Al Othaim Leisure & Tourism Co.

Nazli Balci
U.A.E Operations Manager
HB Leisure

Antoine Zagheb
Director of Operations
SEVEN Attractions

Hani Khalil Al Hussein
Regional Manager UAE
Baan Holding

EDUCATION COMMITTEE

The Education Committee plays a vital role in advancing MENALAC's commitment to industry learning and professional development. The Committee is entrusted with the responsibility of overseeing and shaping a comprehensive range of educational initiatives, including training programs, workshops, and conference content. Its core responsibilities include designing tailored learning experiences that address current industry needs, curating relevant and high-impact content, and fostering a dynamic and engaging learning environment. Through these efforts, the Committee aims to promote continuous professional growth, knowledge sharing, and capacity building across all segments of the leisure and attractions sector.

Peter Stubbs
Head – Education Committee
Vice President - Technical Services, Project Delivery, Sustainability
Majid Al Futtaim Entertainment

Valeria Rizzo
Chief Brand Officer
Red Raion

Emma Jane Forrest
Attractions Project Manager
Event Lab

Ghassan Assi
Chief Operations Officer
Trampo Extreme

Hind Galadari
Deputy General Manager
Miral Experiences

Prakash Vivekanand
Founder & CEO
The Zone Amusement Arcade

Christopher Napier
Global Health, Safety & Talent Development Director
Mellors Entertainment

Daniel Jackson
Principal, Master Planning
ProSlide Technology Inc.

Ryan G. Snyder
Director Planning & Product Development
Aquatic Development Group

Megan Burtch
Merchandising & Training Program Manager
Redemption Plus

Charne Schnetler
Client Services Manager
Safety Skills Training DMCC (SST)

Karim Sijlamassi
Director - MENA, FORREC

Elias Ait-Aissa
Sales Manager, DOF Robotics

OFFICE BEARERS



Alwalid Al Baltan
President
Chairman & Founder
Rafeeh Entertainment Group



Silvio Liedtke
Vice President
CEO, Landmark Leisure



Dr. Janardana Dattakumar
MENALAC Treasurer
Director of Operations
Antic's Land



Mohsin Khan
Director General
Middle East & North Africa
Leisure & Attractions Council



Sanai Parab
Administration Manager
Middle East & North Africa
Leisure & Attractions Council



Yosra Ben Miled
Membership & Events
Middle East & North Africa
Leisure & Attractions Council



Bhawna Balodhi
Membership & Accounts
Middle East & North Africa
Leisure & Attractions Council

MENALAC EVENTS & INITIATIVES



MENALAC 8th Leisure Entertainment & Attractions Conference (CEO Conclave) 2025, Dubai



MENALAC Focus on Egypt 2024, Cairo



MENALAC 8th Health, Safety & Sustainability Conference 2025, Dubai



MENALAC Awards Gala 2025



MENALAC Golf Day 2025, Dubai



MENALAC Spring Mingle, Dubai

MENALAC

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Middle East and North Africa Leisure & Attractions Council

Membership Directory

BENEFACTOR MEMBERS





AL OTHAIM ENTERTAINMENT

Eastern Ring Road Exit 14, P.O. Box 28090 Riyadh 11437

Head of the Company: **Bandr Al Bohairy, CEO & MD**

Key Contact: **Kareem Fayed, General Manager - Entertainment Operations**

Tel: **(+971) 504598735, (+966) 535861790**

Email: **k.fayed@othaim.com**

Website: **www.othaimleisure.com**

Abdullah Al-Othaim entertainment firm is one of Saudi largest entertainment companies specializing in the entertainment sector and the management and implementation of entertainment centers and cities, part of Abdullah Al-Othiam Investment Corporation, which has six trademarks and more than 25 entertainment cities visited by more than 6 million throughout the year. The company operates in accordance with a well-considered strategy to expand the entertainment sector throughout Saudi Arabia, the United Arab Emirates, Qatar, the Sultanate of Oman, the Arab Republic of Egypt.

Type of Leisure Operations: **FEC – Family Entertainment Centre; Mixed Indoor/Outdoor Facility; Trampoline Park; Bowling Centre**

Number of Operations: **70**

No. of countries we operate within: **6**

Brand Names of Operations: **Fabyland, My Town, Saffori Land, Snow City, Xtreme Zone, Xtreme Land, E-Spot Gaming, Xtreme Z, Xtreme Bowling, Splash Waterpark, Xtreme Lazer Zone**





BAAN HOLDING GROUP

Al Murooj District, North Ring Road Between Exit 4 and 5, After Hilton Double Tree, King Fahad Road, Riyadh, 11584, Saudi Arabia

Head of the Company: **Fahad Al Obailan, Group CEO**

Key Contact: **Fahad Al Obailan, Group CEO**

Tel: **(+971) 563472304**

Email: **f.alobailan@baanholding.com**

Website: **www.alhokair.com**

The name BAAN Holding Group has been associated with tourism and entertainment in the Kingdom of Saudi Arabia and the Arab world since 1975 when Sheikh Abdul Mohsen Al Hokair started his career by investing in the entertainment and hospitality sectors.

Type of Leisure Operations: **FEC – Family Entertainment Centre; Trampoline Park; Bowling Centre**

Number of Operations: **130**

No. of countries we operate within: **3**

Brand Names of Operations: **Sparky's, Snowy Forest, Sparky's Bowling, Sparky's Lazertag, Extreme Trampoline Park, Splash, Playocity by Hasbro, Moonbug Cocomelon Playdate, Padel In, Mission Play by Mattel.**

BENEFACTOR MEMBERS

IDEACRATE EDUTAINMENT COMPANY LLC

Office 262, 2nd Floor, Wafra Square Building, Reem Island, Abu Dhabi, 130652, United Arab Emirates





Head of the Company: **Shifa Yusuffali, CEO**

Key Contact: **Jassim Ali, Director - Marketing**

Tel: **(+971) 23051500**

Email: **jassim.ali@ideacrate.net**

Website: **ideacrate.net**

Founded in 2015 and headquartered in Abu Dhabi, IdeaCrate Edutainment Company was established by Shifa Yusuffali, an entrepreneur, early learning advocate and a mother of three. IdeaCrate is dedicated to creating purposeful and innovative experiences for children and families through its thoughtfully designed brands including: **Orange Wheels:** An edutainment centre encouraging creativity and learning through nature-inspired, age-appropriate activities.
Orange Hub: A cutting-edge indoor amusement centre offering immersive, tech-enabled family adventures.
Orange Seeds Nursery: A Montessori-inspired nursery blending the British curriculum with a nurturing environment for holistic early childhood development.
IdeaCrate enriches lives with impactful edutainment solutions.

Type of Leisure Operations: **FEC – Family Entertainment Centre, Play Area / Soft Play / Indoor**

Number of Operations: **12**

No. of countries we operate within: **1**

Brand Names of Operations: **Orange Wheels, Orange Hub, Orange Seeds Nursery**

LANDMARK LEISURE

3rd Floor, Landmark Leisure Head Office, Oasis Mall, Sheikh Zayed Road, Dubai, 127233, United Arab Emirates





Head of the Company: **Silvio Liedtke, CEO**

Key Contact: **Shamin Amin, Head of Marketing and Business Development**

Tel: **(+971) 45288200**

Email: **shamin.amin@landmarkgroup.com**

Website: **landmarkleisure.ae**

Landmark Leisure has been a pioneer in family entertainment across the region since 1999. Its flagship brand Fun City, and other homegrown concepts Fun Block, Fun Works, Fun Ville and Tridom operate across 42 stores in the UAE, Kuwait, Oman, Qatar and Bahrain. Catering to children aged 1-16 years old, Landmark Leisure offers thrilling rides, engaging games, VR experiences and vibrant play areas - all thoughtfully designed to inspire growth and development. Its safe and dynamic environment promotes physical, cognitive and social development, encouraging exploration and joyful moments for children. With creativity and innovation at its core, Landmark Leisure continues to create everlasting smiles.

Type of Leisure Operations: **FEC – Family Entertainment Centre**

Number of Operations: **42**

No. of countries we operate within: **5**

Brand Names of Operations: **Fun City, Fun Blocks, Fun Works, Fun Ville, Tridom, Jumble**

BENEFACTOR MEMBERS





MAJID AL FUTTAIM ENTERTAINMENT

8th Floor MAF Tower 1, Port Saeed, Dubai, 0000, United Arab Emirates

Head of the Company: **Ignace Lahoud, CEO**

Key Contact: **Peter Stubbs, Vice President, Technical Services, Project Delivery, Sustainability**

Tel: **(+971) 565076882**

Email: **Peter.Stubbs@maf.ae**

Website: **www.majidalfuttaim.com**

Majid Al Futtaim - Entertainment operates more than 600 VOX Cinemas screens as well as a portfolio of world-class leisure and entertainment experiences across the region including Ski Dubai, Ski Egypt, DreamScape, Magic Planet, Little Explorers and iFLY Dubai.

Type of Leisure Operations: **Theme Park, Indoor Theme Park, Outdoor Theme Park, FEC – Family Entertainment Centre, Play Area/Soft Play/Indoor**

Number of Operations: **100**

No. of countries we operate within: **8**

Brand Names of Operations: **Magic Planet, Ski Dubai, Ski Egypt, Snow Oman, Snow Abu Dhabi, Yalla Bowling, ifly Dubai, VOX Cinemas, North 28, Activate.**





PLAY ENTERPRISES

Marzouk Tower 15th Floor Jibla, Kuwait, 32001

Head of the Company: **Sheikha Monira Al Sabah, CEO**

Key Contact: **Sheikha Monira Al Sabah, CEO**

Tel: **(+965) 66663311**

Email: **play.discovery@yahoo.com**

Website: **www.playenterprises.com**

PLAY was founded in 2009 to offer safe, clean and high-quality play areas in Kuwait. They have a strict non-violence policy where none of their games has guns nor encourage violence. They aim to be the preferred choice for children and their families.

Type of Leisure Operations: **FEC – Family Entertainment Centre**

Number of Operations: **5**

No. of countries we operate within: **1**

Brand Names of Operations: **Play**

BENEFACTOR MEMBERS

رفيه
Rafeeh
Entertainment Group





RAFEEH ENTERTAINMENT GROUP

7773 Altakasosi Street, Alnakheel District, Riyadh, 12383, Saudi Arabia

Head of the Company: **Alwalid Al Baltan, Owner & Founder**

Key Contact: **Alwalid Albaltan, Owner & Founder**

Tel: **(+966) 500211111**

Email: **aalbaltan@baltangroup.com**

Website: **rafeeh.pos-ksa.com**

Founded by Albaltan Group in 2019, Rafeeh Entertainment Group has emerged as a leader in the Kingdom's entertainment and solutions sectors. With expertise in property management and investment, founder Alwalid identified a gap in the market and aimed to set new benchmarks. Rafeeh has rapidly grown from a start-up into a dynamic force, redefining industry standards. Its subsidiaries, including Takenda, Prestige, Aqdar, Adventure Camp and Teens, span diverse entertainment fields, offering innovative experiences. Today, Rafeeh stands as a trailblazer, reshaping how entertainment and solutions are delivered in the Kingdom.

Type of Leisure Operations: **Theme Park, Indoor Theme Park, Outdoor Theme Park, FEC – Family Entertainment Centre, Play Area/Soft Play/ Indoor, Outdoor Facility, Trampoline Park, Bowling Centre**

Number of Operations: **7**

No. of countries we operate within: **1**

Brand Names of Operations: **Takenda, Prestige, Aqdar, Teens, Adventure Camp.**

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Middle East and North Africa Leisure & Attractions Council

We would like to thank our Benefactor Members for their support to the MENA Leisure Industry

OPERATOR MEMBERS

ADVENTURE WORLD ENTERTAINMENT

Othman Bin Affan Street, Ar Rayan Dist. Dammam, Eastern, 322256, Saudi Arabia

Adventure World Entertainment is a leading entertainment company in Saudi Arabia, dedicated to creating unforgettable experiences for families and children. As a subsidiary of Saudi Marketing Company (Farm Superstores), we bring innovative, safe, and engaging entertainment solutions to communities across the Kingdom.

Key Contact: **Hassan Ahmad, Executive Director**

Type of Leisure Operations: **FEC – Family Entertainment Centre, Play Area/Soft Play/ Indoor, Trampoline Park, Bowling Center**

Number of Operations: **24**

No. of countries we operate within: **1**

Brand Names of Operations: **Adventure World, Jumpoline, Bonkers**

Tel : **(+966) 536003898**
Email : **hassan.ahmad@farm.com.sa**
Website : **www.awsaudi.com**

AL ITHARAH AMUSEMENT CENTER LLC.

Levels 1 and 2, Sahara Centre, Al Nahda Interchange, Dubai-Sharjah Road, Al Nahda - Sharjah, 33169, United Arab Emirates

Adventureland offers 40+ thrilling rides and attractions, including three indoor roller coasters,VR games, an indoor zip line, and Spooky - Dungeons of Fear, along with 170+ mixed games—all within over 90,000 sq. ft, delivering endless fun for the whole family!

Key Contact: **Vimal Babu, Assistant Marketing Manager**

Type of Leisure Operations: **FEC – Family Entertainment Centre, Play Area/Soft Play/ Indoor, Trampoline Park, Bowling Centre**

Number of Operations: **100**

No. of countries we operate within: **2**

Brand Names of Operations: **Adventureland, Spooky - Dungeons of Fear, Bowl N' Roll**

Tel : **(+971) 65316363**
Email : **vimal.babu@adventureland.ae**
Website : **www.adventurelanduae.com**

ANTIC'S LAND

3rd Level, Mega Mall, Abu Shagarah, Sharjah, 28248, United Arab Emirates

Antic's Land, located in Sharjah Mega Mall, is the Middle East's largest indoor family theme park with an oriental theme. Featuring 20 thrilling rides, 50+ games, VR Zone, bowling, and unique attractions, it offers endless entertainment for all ages. Explore Beauty, Discovery, and Utopia lands for a magical experience.

Key Contact: **Janardana Dattakumar, Director of Operation**

Type of Leisure Operations: **Family Entertainment Centre**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Antic's Land**

Tel : **(+971) 65746699**
Email : **dkumar@anticsland.com**
Website : **www.anticsland.com**

OPERATOR MEMBERS

ATLANTIS THE PALM

Crescent Road, The Palm Jumeirah, Dubai, 211222, United Arab Emirates

Spanning 22.5 hectares, the Atlantis Aquaventure World is home to 3 themed towers, 1km of private beach, and more than 105 attractions and experiences for guests to enjoy, motorised and non-motorised watersports, 26 marine experiences including The Lost Chambers Aquarium, educational dolphin, and sea lion experiences.

Key Contact: **Sascha Triemer, General Manager and Vice President - Aquaventure World**

Type of Leisure Operations: **Water Park, Other, Aquarium**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Aquaventure Waterpark, Lost Chambers Aquarium, Dolphin Bay and Sea Lion Point**

Tel : **(+971) 44260000**
Email : **Sascha.Triemer@atlantisdubai.com**
Website : **www.aquaventureworld.com**

CHEEKY MONKEYS PLAYLAND LLC

Office No. 1 Sheikha Sana, 3A Street, Al Quoz 1, Dubai, 450336,
United Arab Emirates

Cheeky Monkeys is an award-winning soft play area offering fun, education, and social interaction for kids ages 10 months to 8 years. With over 3000 sq. ft., party rooms, free activities, and safe play spaces, it's the perfect destination for family fun!

Key Contact: **Abbas Rizvi, CEO**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Number of Operations: **122**

No. of countries we operate within: **4**

Brand Names of Operations: **Cheeky Monkeys, Extreme Play**

Tel : **(+971) 43493021**
Email : **abbas.r@cheekymonkeys.ae**
Website : **www.cheekymonkeys.com**

CYAN WATERPARK

4740 King Saud Rd, Jeddah, 23829, Saudi Arabia

Cyan Waterpark, Saudi Arabia's largest since 2022, is the first to allow both genders and families to enjoy attractions together. Owned by Rawae Company, a leading Saudi entertainment firm since 1978, Rawae has expanded into home accessories, stationery, kids' activities, Little Farm, F&B, and Cyan Waterpark.

Key Contact: **Eng. Wissam Banaja, CEO**

Type of Leisure Operations: **Water Park**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Cyan Waterpark**

Tel : **(+966) 556633377**
Email : **wissam@rawae.com**
Website : **www.cyanwp.com**

OPERATOR MEMBERS

DOHA QUEST

Al Khaleej Street 211, Doha, 24006, Qatar

Quest, Qatar's largest indoor theme park in Doha Oasis, is home to the world's tallest indoor roller coaster and drop tower. Built on a story-based concept centered on time, it boasts over 30 thrilling rides and attractions, including roller coasters, virtual reality, 3D experiences, indoor skydiving, and laser tag.

Key Contact: **Heiko Engels, General Manager**

Type of Leisure Operations: **Indoor Theme Park**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Doha Quest**

Tel : **(+974) 44103665**
Email : **hengels@dohaquest.com**
Website : **www.dohaquest.com**

DUBAI GOLF

17/2, Al Naseem Street, Emirates Golf Club, Al Thanyah 3, Hadaeq Mohammed Bin Rashid, Dubai, United Arab Emirates

Dubai Golf provides unique venues for corporate and major events. Dubai Golf has been at the forefront of golf and golf related services since their inception in the Emirates. The company is proud of its responsibility and seeks to continue to innovate and lead the industry in future.

Key Contact: **Megan Hewitt-Dean, Head Marketing & Communications**

Type of Leisure Operations: **Sports Entertainment, Mixed Indoor/Outdoor Facility, Competitive Socializing, Gastrogaming**

Number of Operations: **4**

No. of countries we operate within: **1**

Brand Names of Operations: **Topgolf Dubai, Tiger Strikes**

Tel : **(+971) 43801919**
Email : **mhewittdean@dubaigolf.com**
Website : **www.dubaigolf.com**

EMAAR ENTERTAINMENT LLC

Mall Management Office, Dubai Mall, Dubai, 191741, United Arab Emirates

Emaar Entertainment (L.L.C) is a leading operator managing a world-class portfolio of attractions and exceptional experiences that bring delight, enrich lives and inspire joy for all. Through this, Emaar Entertainment has cemented its reputation as the region's leading provider of the most diverse entertainment destinations.

Key Contact: **Bency Kuruthukulam, Executive Assistant**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Visitor Attraction; Aquarium, Culture Centre, Museum**

Number of Operations: **22**

No. of countries we operate within: **4**

Brand Names of Operations: **At The Top Burj Khalifa, Sky Views Observatory, Dubai Aquarium & Underwater Zoo, Play DXB, Dubai Ice Rink, Reel Cinemas, KidZania, Zabeel Sports District, Ekart, Adventure Park, The Storm Coaster, Arabic Music Institute, Dubai Opera**

Tel : **(+971) 43627625**
Email : **BKuruthukulam@emaar.ae**
Website : **www.entertainment.emaar.com**

OPERATOR MEMBERS

EXPO CITY DUBAI

Expo 2020 Blvd, Dubai, United Arab Emirates

Expo City Dubai offers two exciting attractions: Garden in the Sky, a rotating observation tower that rises 55 meters for panoramic views, surrounded by trees and glowing at night. Nearby, Around the World Carousel features hand-painted scenes from past World Expos, offering a whimsical and nostalgic experience.

Key Contact: **Rosa Tahmaseb, Head of Operations - Education & Culture**

Type of Leisure Operations: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Center), Play Area/Soft Play/Indoor Attraction**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Expo City, Garden In The Sky, Around The World Carousel**

Tel : **(+971) 45552020**
Email : **rosa.tahmaseb@expocitydubai.ae**
Website : **www.expocitydubai.ae**

FAWASEL ADVANCED

The Headquarters Business Park, Al Kurnaysh Br Rd, Ash Shati, Jeddah, 23511, Saudi Arabia

Fawasel, an entertainment and tourism company founded by Dallah Albaraka in 2011. Fawasel is specialized in creating entertainment and tourism concepts and experiences from inception to development. We strive to elevate standards by delivering unique and unforgettable experiences for locals and international visitors alike.

Key Contact: **Iman Machlab, Marketing Specialist**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility**

Number of Operations: **5**

No. of countries we operate within: **1**

Brand Names of Operations: **The Dockx, Battle Dome, TopShot, MetaWorld, War Castle**

Tel : **(+966) 567388331**
Email : **i.machlab@fawasel.life**
Website : **www.fawasel.life**

FIAFIA KIDS AMUSEMENT ARCADE LLC

Shop 8, Al Ferdous Building 2, Al Wasl Road, Al Safa, Dubai, United Arab Emirates

Fiafia play area and cafe was created with both children and adults in mind, where kids come to have fun and grownups come to relax. Fiafia is the local neighborhood community place for families to socialize and have fun.

Key Contact: **Alia Al Nabooda, Owner**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Number of Operations: **2**

No. of countries we operate within: **1**

Brand Names of Operations: **Fiafia**

Tel : **(+971) 43273345**
Email : **alia@fiafia.ae**
Website : **www.fiafia.ae**

OPERATOR MEMBERS

FUN CITY PAKISTAN

4th Floor, The Centaurus Mall F-8, Jinnah Avenue, Islamabad, Pakistan

Funcity Pakistan is an indoor family entertainment center offering a multi-level soft play area, kiddie rides, and 68 arcade games. With cutting-edge technology, it leads the entertainment industry in Pakistan. Winner of MENALAC's "Best FEC 2019 Award," it delivers fun, value, and top-tier amusement experiences for all ages.

Key Contact: **Kashif Ali, Managing Director**

Type of Leisure Operations: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Number of Operations: **2**

No. of countries we operate within: **1**

Brand Names of Operations: **Fun City Pakistan**

Tel : **Pakistan: (+92) 3208101101, Dubai: (+971) 504001899**
Email : **kashif@funcity.pk**
Website : **www.funcity.pk**

FUN ZONE PARK CO FOR KIDS ENTERTAINMENT GAMES

Sharq - Al-Merqab - Al-Sour St - Al-Tijaria Tower - Floor No 31, Al-Merqab, 15000, Kuwait

HM International Holding is a distinguished Kuwaiti firm dedicated to fostering local businesses. Our mission is to enrich the community by providing unparalleled entertainment experiences for families and children. Specializing in the development and operation of family entertainment centers, our flagship brands include Fun Zone Park, Icy Village, Eat Bit and Snow Park.

Key Contact: **Hussain Marafie, Group CEO**

Type of Leisure Operations: **Theme Park, Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Trampoline Park**

Number of Operations: **8**

No. of countries we operate within: **1**

Brand Names of Operations: **Fun Zone Park, Icy Village, Snow Park, Eat Bit**

Tel : **(+965) 22470839**
Email : **hm@sweetandmore.co**
Website : **https://www.instagram.com/funzonepark/?hl=en#**

FUNZONE FAMILY ENTERTAINMENT CENTRE

2157, Qurum Natural Park OM, Al Qurum St. Muscat 112, Oman

FunZone Oman, in Qurm, Muscat, is a premier 8,000-square-meter family entertainment destination. Offering world-class attractions, quality dining, and a vibrant atmosphere, it ensures safety, comfort, and fun for all ages. Conveniently located near major roads, FunZone delivers unforgettable experiences in the heart of the city.

Key Contact: **Wael Katergi, Executive Manager**

Type of Leisure Operations: **Theme Park, Indoor Theme Park, Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Fun Zone Oman**

Tel : **(+968) 24662928**
Email : **wael@funzone.om**
Website : **www.funzone.om**

OPERATOR MEMBERS

GROUND CONTROL ENTERTAINMENTS CO LLC

NKM-E-029, Nakheel Mall, Palm Jumeriah, Dubai 17777, United Arab Emirates

Crafting the Future of Fun, GC Entertainment unites seasoned professionals to design, develop, and launch premium leisure concepts across the GCC and the world. We blend bold, imaginative thinking with a deep understanding of play psychology to create immersive, interactive venues that captivate children and adults alike. Each concept; often featuring an educational or team-building dimension; is strategically placed in high-footfall retail centres and standalone destinations to maximize visibility and engagement. Our proven approach drives strong repeat visitation, extended dwell times, and sustainable revenue growth by consistently exceeding guest expectations.

Key Contact: **Mohamed Attia, Founder & CEO**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Arcade, Bowling Centre, Play Area/Soft Play/Indoor Play**

Number of Operations: **5**

No. of countries we operate within: **5**

Brand Names of Operations: **Ground Control Social**

Tel : **(+971) 553813135**

Email : **ma@groundcontrolsocial.com**

Website : **www.groundcontrolsocial.com**

HB LEISURE GAMES AND ARCADES LLC

Warehouse No. 05, P.O. Box 114121, Dubai Investment Park 2, 19th Street, Dm No, Dubai, 597-890, United Arab Emirates

HB Leisure, founded by marine engineer Harold Burt in 1932, is a world leader in skill games, operating in over 90 theme parks globally. With a commitment to fun and customer satisfaction, HB Leisure serves over 100 million visitors annually, awarding $50 million in prizes while providing unique, challenging games.

Key Contact: **Nazli Balci, Operations Manager**

Type of Leisure Operations: **Theme Park, Indoor Theme Park, Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility**

Number of Operations: **90**

No. of countries we operate within: **20**

Brand Names of Operations: **HB Leisure**

Tel : **(+971) 45488566**

Email : **n.balci@hbleisure.com**

Website : **www.hbleisure.com**

IMG THEME PARK L.L.C.

Sheikh Mohammad Bin Zayed Road, City of Arabia Dubai, P.O. Box 114444, United Arab Emirates

IMG Worlds of Adventure is the largest indoor theme park in Dubai, six unique worlds spanning, across a vast 1.5 million square feet, Cartoon Network and Marvel, Lost Valley IMG Boulevard, IMG Kids Zone and The Haunted Town. Over 22 thrilling rides, 25, retail stores, 37 immersive F&B outlets.

Key Contact: **Yawar Pasha, Group Chief Financial Officer**

Type of Leisure Operations: **Theme Park, Indoor Theme Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor Play**

Number of Operations: **1**

No. of countries we operate within:**1**

Brand Names of Operations: **Lost Valley Adventure Zone, IMG Kids Zone, The Haunted Town, IMG Boulevard, Marvel, Cartoon Network**

Tel : **(+971) 44038888**

Email : **Yawar.Pasha@imgaladari.com**

Website : **www.IMGworlds.com**

OPERATOR MEMBERS

INTERNATIONAL EXPO CONSULTS

Office 8, Sheikh Rashid Building, Sheikh Zayed Road, Dubai, 50006, United Arab Emirates

International Expo-Consults LLC (IEC) is a leading trade show organizer with 29+ years of expertise in the Middle East, North Africa, and Asia Pacific, hosting premier events like SGI Dubai and DEAL Middle East for global industries.

Key Contact: **Abdulrahman Falaknaz, President**

Type of Leisure Operations: **Theme Park, FEC (Family Entertainment Centre)**

Number of Operations: **1**

No. of countries we operate within: **6**

Brand Names of Operations: **International Expo Consults, DEAL Show, Dubai Garden Glow**

Tel : **(+971) 43435777**
Email : **president@iecdubai.com**
Website : **www.iecdubai.com**

JOURY INTERNATIONAL FOR FOOD & ENTERTAINMENT

Mubarak Al Kaber St, Block 9, Building 15, 2nd Floor, Murgab, 11584, Kuwait

Joury Entertainment, a Masbi Group subsidiary, operates Chuck E. Cheese in Kuwait, with plans to expand across the GCC. Focused on family fun, it offers dining and entertainment in a safe, secure environment under one roof.

Key Contact: **Ahmed Alsubaiei, Owner & GM**

Type of Leisure Operations: **FEC (Family Entertainment Centre)**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Chuck-E-Cheese, Joury Entertainment**

Tel : **(+965) 55069606**
Email : **aalsubaiei@masbigroup.com**
Website : **www.masbigroup.com**

LUCKY ENTERTAINMENT PRIVATE LIMITED

2nd Floor Lucky One Shopping Mall Opp. UBL Sports Complex, Main Rashid Minhas Road, F.B. Area, Karachi, Sindh, 75300, Pakistan

Spanning two expansive floors and covering an impressive 4180 square meters, Onederland stands as a testament to grandeur. Boasting a diverse repertoire of over 100 attractions, the facility is a captivating blend of thrilling attractions and arcade games designed to enthral visitors.

Key Contact: **Ammar Motan, Chief Executive Officer**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Number of Operations: **1**

No. of countries we operate within:**1**

Brand Names of Operations: **Onederland**

Tel : **(+92) 2136377126**
Email : **ammar.motan@onederland.com.pk**
Website : **onederland.com.pk**

OPERATOR MEMBERS

M.H. ALSHAYA CO. WLL

P.O. Box 181, Kuwait City Safat, 13002, Kuwait

Alshaya Group, founded in Kuwait in 1890, is a global leader in brand franchising, operating thousands of stores, cafes, and digital platforms across MENA, Turkey, and Europe. Representing iconic brands like Starbucks, H&M, and The Cheesecake Factory, Alshaya delivers exceptional customer experiences in fashion, food, beauty, and entertainment.

Key Contact: **Steven Putzeys, Business Manager, Leisure & Entertainment**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility**

Number of Operations: **4**

No. of countries we operate within: **2**

Brand Names of Operations: **Kidzania Kuwait, Quest, Tekzone**

Tel : **(+965) 22283434, (+965) 97257690**
Email : **steven.putzeys@alshaya.com**
Website : **www.alshaya.com**

MALAHI

Prince Mohammed Ibn Salman Ibn Abdulaziz, Riyadh, 13514, Saudi Arabia

Malahi is one of the leading Saudi companies in the entertainment industry. It owns and operates numerous entertainment sites in various regions of the Kingdom. It was established in 2022 with the integration of several entertainment companies that have a history that go back to 2008. Malahi combines both experience and innovation.

Key Contact: **Sameer Chadkan, Business Development & Procurement Assistance**

Type of Leisure Operations: **Theme Park, FEC (Family Entertainment Center), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility**

Number of Operations: **14**

No. of countries we operate within: **1**

Brand Names of Operations: **Doos Karting, Fizz Hawa, Fizz Adventures, Garage, Lambee, 1noos, Remote, Malahi Gallery**

Tel : **(+966) 547779930**
Email : **sameer@malahi.com**
Website : **www.malahi.com**

MASHREQ AL KHALEEJ ENTERTAINMENT TRADING EST

King Abdulaziz Road, Ash Shati Dist, Jeddah, 123612, Saudi Arabia

ADVENTURA, a kids' play brand in Saudi Arabia, caters to children aged 1 to 10. Featuring play areas, arts & crafts, sand play, and party sections, it promotes screen-free fun. Currently in Riyadh's The Zone Mall and Jeddah's Red Sea Mall, it's expanding to three more locations soon.

Key Contact: **Farraj Al Malki, CEO**

Type of Leisure Operations: **FEC – (Family Entertainment Center), Play Area/Soft Play/ Indoor Play**

Number of Operations: **2**

No. of countries we operate within:**1**

Brand Names of Operations: **Adventura**

Tel : **(+966) 551122559**
Email : **farraj@adventura.com.sa**
Website : **www.adventura.com.sa**

OPERATOR MEMBERS

MELLORS GROUP

16 Long Row, Nottingham, Default, NG1 2DH, United Kingdom

Mellors Group, a family-run business, specializes in managing theme parks, water parks, and events. Known for project management, staff recruitment, and revenue optimization, they excel in installing large-scale rides. With City and Guilds-approved training, innovative VR programs, and proprietary apps, Mellors leads the digital transformation of the leisure industry.

Key Contact: **Dave Elliott, Commercial Director**

Type of Leisure Operations: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility**

Number of Operations: **4**

No. of countries we operate within: **3**

Brand Names of Operations: **Lusail Winter Wonderful, Winter Wonderland Kuwait, Jeddah, Citywalk, Riyadh Winter Wonderland**

Tel : **(+44) 1159679991**
Email : **d.elliott@mellorsgroup.com**
Website : **www.mellorsgroup.com**

MERMAIDS OF ARABIA

Ground Level, Inside Dubai Aquarium, Entrance Next to H&M Apparel, Financial Center St, Dubai Mall, United Arab Emirates

In our world, every child feels safe, valued and inspired to achieve anything they dream of. Through fantasy, mindfulness, and creativity; Mermaids of Arabia is devoted to serving children in discovering and sharing their unique gifts with the world.

Key Contact: **Josephine Adams, General Manager**

Type of Leisure Operations: **Indoor Theme Park, FEC (Family Entertainment Center), Play Area/Soft Play/Indoor**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Mermaids of Arabia**

Tel : **(+971) 43336098**
Email : **josephine@mermaidsofarabia.com**
Website : **www.mermaidsofarabia.com**

MERYAL WATERPARK

Zone 69, Street 531, Building 38, Lusail, Qatar

Meryal Waterpark is one of the largest waterparks in the GCC. There are a variety of exciting attractions, including 53 slides and 69 total attractions. Meryal is also home to Rig 1938, the tallest waterslide tower in the world at over 85 meters.

Key Contact: **Bill Lentz, General Manager**

Type of Leisure Operations: **Water Park**

Number of Operations: **1**

No. of countries we operate within:**1**

Brand Names of Operations: **Meryal Waterpark**

Tel : **(+974) 70820299**
Email : **blentz@meryalwaterpark.com**
Website : **www.meryalwaterpark.com**

OPERATOR MEMBERS

MIRAL EXPERIENCES

Yas Island, Abu Dhabi – United Arab Emirates. PO BOX 128717

Miral Experiences operates a diverse portfolio of world-class, award-winning immersive experiences and attractions in Abu Dhabi, bringing joy to visitors from around the world. From thrilling adventures and hands-on discovery to enriching cultural experiences, our destinations offer something for everyone, creating unforgettable moments for all ages.

Key Contact: **Hind Galadari, General Manager, Warner Bros. World™ Yas Island Abu Dhabi**

Type of Leisure Operations:**Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre and Others**

Number of Operations: **7**

No. of countries we operate within:**1**

Brand Names of Operations:**Ferrari World Yas Island Abu Dhabi, Yas Waterworld Abu Dhabi, Warner Bros. World™ Yas Island Abu Dhabi, SeaWorld Yas Island Abu Dhabi, CLYMB Abu Dhabi, TeamLab Phenomena Abu Dhabi, Qasr Al Watan.**

Tel : **(+971) 600511115**

Email : **hgaladari@miral.ae**

Website : **https://miral.ae/miralexperiences/**

SAUDI ENTERTAINMENT VENTURES (SEVEN)

Saudi Entertainment Ventures Airport Road, Riyadh, 13414, Saudi Arabia

Saudi Entertainment Ventures (SEVEN), founded by the Public Investment Fund, boosts Saudi Arabia's entertainment sector under Vision 2030. SEVEN enhances local offerings, develops talent, and partners with global brands like AMC. Its projects include cinemas, adventure parks, and entertainment complexes, aiming to establish Saudi Arabia as a global cultural hub.

Key Contact: **Chris Swartz, Executive Director - Attractions**

Type of Leisure Operations:**Theme Park, FEC (Family Entertainment Centre)**

Number of Operations: **20**

No. of countries we operate within: **1**

Brand Names of Operations: **Seven**

Tel : **(+966) 550340455**

Email : **christopher.swartz@seven.sa**

Website : **www.seven.sa**

SEEF ENTERTAINMENT

Area Al Seef, Block 428, Road 2825, Building 2102 Manama, P.O. BOX 20084, Bahrain

Seef Entertainment was established in 1998 to transform the entertainment landscape of Bahrain with the aim of creating and developing unique entertainment centers that would become the preferred 'go-to' destinations for fun and excitement in Bahrain.

Key Contact: **Ahmed Yusuf, CEO**

Type of Leisure Operations: **Indoor Theme Park, FEC (Family Entertainment Center), Play Area/Soft Play/Indoor Play, Trampoline Park**

Number of Operations: **5**

No. of countries we operate within: **1**

Brand Names of Operations: **Magic Island, Yabeela, Hawa, Jumpoline**

Tel : **(+973) 77911202**

Email : **a.yusuf@seef.com.bh**

Website : **www.seefentertainment.com.bh**

OPERATOR MEMBERS

SELA

Obhur South, 6328 Al Kurnaysh Br Rd. 2452, Jeddah, 21411, Saudi Arabia

SELA is a key player in the recreational sectors in the region. SELA provides experiences across recreational industries, from sports and culture, entertainment and hospitality, to exhibitions and more.

Key Contact: **Khalid Abdullah, Development and Strategic Planning Director**

Type of Leisure Operations: **Indoor Theme Park, Outdoor Theme Park; FEC (Family Entertainment Centre), Visitor Attraction, Culture Center**

Number of Operations: **50**

No. of countries we operate within: **1**

Brand Names of Operations: **SELA, Riyadh Seasons**

Tel : (+966) 561600125
Email : k.abdullah@sela.sa
Website : www.sela.sa

TAMDEEN ENTERTAINMENT COMPANY

360 Mall, 4th Floor, Office 1, Al Zahraa Hawally, Kuwait

Since acquiring Tamdeen Real Estate in 1996, Tamdeen Group has become a leading developer in Kuwait, with assets exceeding KWD 1.2 billion. Focusing on innovation, real estate, investment, and entertainment, the Group consistently drives growth and diversification.

Key Contact: **Ahmad Al-Osaimi, CEO & Chairman**

Type of Leisure Operations: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor Outdoor Facility, Trampoline Park, Bowling Center, Other**

Number of Operations: **6**

No. of countries we operate within: **2**

Brand Names of Operations: **Tamdeen Entertainment, Cinescape, Infunity, The Freeze Club, Infunity Sea, The Arena Kuwait, Fun Tiki, The Bowl Room, Make, Wonder Zone, Q8 Karting, Sky Zone, Jump & the Court**

Tel : (+965) 1882233
Email : a.alosaimi@tamdeen.com
Website : www.tamdeen.com

THE ZONE AMUSEMENT ARCADE

The Zone, Circle Mall, JVC, Dubai, United Arab Emirates

The Zone is an action-packed Entertainment Concept specifically developed to cater to Communities & Leisure Resorts. The ZONE is loaded with Fun, Play elements catering to all age groups in a safe, hygienic, secure and dynamic arcade environment! The Zone is all about Engagement, Entertainment & Guest Experience.

Key Contact: **Aakansha Sharma, General Manager - Operations**

Type of Leisure Operations: **FEC (Family Entertainment Center), Play Area, Soft Play, Indoor Playground**

Number of Operations: **2**

No. of countries we operate within: **1**

Brand Names of Operations: **The Zone**

Tel : (+971) 45876041
Email : aakansha@asi-world.com
Website : www.thezonearcade.com

OPERATOR MEMBERS

TRAMPO EXTREME

Symphony Style Mall, Floor 2, Office 6 Salmiya, Kuwait

JUMP! into fun with Trampo Extreme, an indoor playground offering exciting activities like trampolines, foam pits, climbing walls, and more. Perfect for families in Kuwait, Oman, UAE, and Qatar, it's where fun meets fitness in a safe environment!

Key Contact: **Ghassan Assi, Chief Operation Officer**

Type of Leisure Operations: **Indoor Theme Park, FEC (Family Entertainment Centre), Trampoline Park**

Number of Operations: **7**

No. of countries we operate within: **4**

Brand Names of Operations: **Jump, Climb, Slide, Leap, Skytrail, Zipline**

Tel : (+965) 60663424
Email : ghassan.assi@trampo.com
Website : www.trampo.com

WADINA WATERPARK (LIWAN INVESTMENT LLC)

3rd Floor Ship Mall Building, Al Ghubra, Muscat, Oman

Wadina Water Park is a vibrant destination nestled in the heart of Nizwa, Oman, known for its exhilarating water attractions and family-friendly atmosphere.

Key Contact: **Abdul Aziz Badar Hilal Al Yahmadi, General Manager**

Type of Leisure Operations: **Water Park**

Number of Operations: **1**

No. of countries we operate within: **1**

Brand Names of Operations: **Wadina**

Tel : (+968) 95850505
Email : abdulaziz@amjaad.com
Website : www.wadinawaterpark.com

WECOMPANY

1km Defence Road, Off Raiwind Road, Lahore, Punjab, 55150, Pakistan

We are Pakistan's largest entertainment hub creating premium family leisure activities. 'We Company' is the parent company of the emerging entertainment giant. Our Slogan is 'We Define Entertainment'. We are currently operational in Islamabad, Peshawar, Lahore and Chiniot as We Play, We Jump, We Munch respectively.

Key Contact: **M Nouman, Head - Projects & Expansions**

Type of Leisure Operations: **FEC (Family Entertainment Center), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park**

Number of Operations: **4**

No. of countries we operate within: **1**

Brand Names of Operations: **We Play, We Jump, We Munch**

Tel : (+92) 4235966128
Email : projects.vibractive@dinindustries.com.pk
Website : www.wecompany.pk

MANUFACTURER/SUPPLIER MEMBERS

ACCESSO TECHNOLOGY GROUP, PLC

Unit 5, The Pavilions, Ruscombe Park Twyford, Berks, RG10 9NN, United Kingdom

Accesso is the leading global provider of award-winning technology solutions that redefine the guest experience, drive increased revenue, streamline operations and support data-driven business decisions for leisure & entertainment operators. To learn more about our intuitive ticketing, point-of-sale, virtual queuing, distribution and experience management technology and more, visit accesso.com.

Key Contact: **Andrea Bisi, Vice President, Sales**

Type of Leisure Operations We Cater To: **Theme Park, Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Visitor Attraction, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Point of Sale Software, Web-Based Services**

Tel : (+44) 1189347400
Email : Andrea.Bisi@accesso.com
Website : www.accesso.com

ACTIVE LEISURE

Bin Dasmal Building Floor 1, Office 303, Dubai, United Arab Emirates

ALEM offers expert services in installation, relocation, maintenance, repair, and refurbishment of amusement rides and water slides. With its German partner Kauls & Co., ALEM handles everything from assessment to implementation, documentation, and spare parts, providing a one-stop solution for all your ride maintenance needs, saving time and costs.

Key Contact: **Christoph Seidl, Managing Partner**

Type of Leisure Operations We Cater To: **Theme Park, Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility**

Type of Product/Services: **Maintenance, Refurbishment, Repair of Amusement Rides and Slides of all kinds**

Tel : (+971) 585910093
Email : christoph@activeleisure.co
Website : www.alemglobal.co

ADIRONDACK ARCHITECTURAL MODELS INDUSTRY LLC

J1 Warehouse Complex, Unit C05, Jebel Ali Industrial Area 1, Dubai, 263822, United Arab Emirates

Since 1975, Adirondack Studios (ADKS) has provided award-winning creative solutions for designers, artists, producers and owners of entertainment and cultural destinations worldwide.

Key Contact: **Nada Radwan, Business Development Manager**

Type of Leisure Attractions we cater to: **Themed & Amusement Parks, Water Parks, FECs, Museums, Resorts & Cruise Lines, Live Performing Arts Venues, Brand/Retail Experiences, Restaurants/Hospitality, and Public Art Installations**

Type of Product/Services: **Themed Scenery**

Tel : (+971) 43201798
Email : nradwan@adkstudios.com
Website : www.adkstudios.com

MANUFACTURER/SUPPLIER MEMBERS

ADYEN

Unit 1304-1308, Al Sufooh Complex, Dubai Media City, Dubai
United Arab Emirates

Adyen is the financial technology platform of choice for leading companies. By providing end-to-end payments capabilities, data-driven insights in a single global solution, Adyen helps businesses achieve their ambitions faster. With offices around the world, Adyen works with the likes of Aquaventure, One & Only, CitizenM, and Raffles Hotel.

Key Contact: **Daumantas Grigaravicius, Head of Middle East**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Center, Aquarium, Culture Center, Museum.**

Type of Product/Services: **Digital Payments, In Person Payments, Unified Commerce**

Tel : (+971) 43753811
Email : daumantas.grigaravicius@adyen.com
Website : www.adyen.com/en_ae

ALIGN ON DEMAND LABORS SUPPLY SERVICES LLC

Suite No. 301 , 3rd Floor Sobha Ivory 2 Business Bay, Dubai, 299640,
United Arab Emirates

Align Staffing is a UAE-approved manpower expert delivering tailored workforce solutions across leisure & entertainment, events, hospitality, logistics, government, and more. From recruitment to payroll and training, they empower businesses with skilled talent and seamless staffing support across the UAE, KSA, and UK.

Key Contact: **Alex Chacko, Events GM**

Type of Leisure Operations We Cater To: **Theme Park, Family Entertainment Centre**

Type of Product/Services: **Management/Planning, Staff Training, Staffing"**

Tel : (+971) 44405923
Email : Alex@alignmanpower.com
Website : www.alignmanpower.com

ALMERIA TECHNICAL SERVICES LLC

R364 Al Wasl Building, 5th Floor Office 505, Unique World Business Center (Branch), Zabeel St., Al Karama, Dubai, United Arab Emirates

Almeria Technical Services was established in 2019 with the aim of becoming the leading amusement rides contracting company in the UAE and region. We work with wide range of clients such as theme and amusement parks and more. We are committed to producing nothing less than top quality work.

Key Contact: **Karim Malaeb, General Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other, Visitor Attraction, Aquarium.**

Type of Product/Services: **Amusement Rides Specialist- Rides Service, Repair & Parts**

Tel : (+971) 506156465
Email : info@almeria-me.com
Website : Under Construction

MANUFACTURER/SUPPLIER MEMBERS

ALSHAAR AMUSEMENT SERVICES CO. L.L.C

Dubai Business Bay, Park Lane Tower, Office 1722, Dubai, United Arab Emirates

We are a company in the United Arab Emirates specialized in buying and selling used rides, disassembly, assembly and spare parts.

Key Contact: **Eyad Alshaar, General Manager**

Type of Leisure Operations We Cater To: **Amusement Facilities, Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre).**

Type of Product/Services: **Amusement Rides, Used Equipment, Games & Devices, Rides (Dry), Bumper Cars, Carousels, Dark, Go-Karts, Kiddie, Major, Manufacturer's Representative, Roller Coasters, Service, Repair, Refurbishment, Spare Parts & Technical Support.**

Tel : (+971) 501785415
Email : eyad@alshaar.ae
Wesite : www.alshaar.ae

AMUSEMENT SERVICES INTERNATIONAL LLC

1706-1708, Tameem House, Al Fosool Street, TECOM C, Dubai, UAE

Amusement Services International LLC (ASI) is the most recognized supply & service provider for the MENA Leisure Entertainment & Attractions Industry. With over 26 years of experience, ASI is associated with leading leisure & entertainment operations throughout the region. ASI is the winner of MENALAC's Best Supplier of the Year for the last 4 years in a row, from 2020 to 2023. ASI caters to leisure and entertainment operators across 35 countries.

Key Contact: **Rosanne Fernandes, General Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Family Entertainment Centre, Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Bowling Centre.**

Type of Product/Services: **Supply & Installation of Arcade Games, Video Games, Amusement Rides & Attractions, Redemption & Novelty Games, VR Attractions, Motion Simulators, Adventure Playscapes, Experiential Bowling Concepts, Midway Carnival Games and Edutainment Concepts.**
ASI offers a range of services from feasibility study to master planning, concept design, attraction supply, fit-out, theming, pre-opening, installation, commissioning as well as operation's management.

Tel : (+971) 44542929
Email : rosanne@asi-world.com
Website : www.asi-world.com

AQUATIC DEVELOPMENT GROUP

13 Green Mountain Dr., Cohoes, New York, 12047, United States

Aquatic Development Group has over 50 years of experience & expertise and is one of the world's most respected water park and aquatic venue design, construction, and manufacturing firms in the industry.

Key Contact: **Carly Beckstead, Design & Communications Coordinator**

Type of Leisure Operations We Cater To: **Water Park**

Type of Product/Services: **Master Planning, Engineering, Manufacturing, Installation, and Lifetime Support for Aquatic Attractions—from Waterparks and Surf Zones to Pools and Wave Systems."**

Tel : (+1) 5187830038
Email : carly.beckstead@aquaticgroup.com
Website : www.aquaticgroup.com

MANUFACTURER/SUPPLIER MEMBERS

BANDAI NAMCO AMUSEMENT EUROPE LTD.

37 - 39 Kew Foot Road, Richmond, Greater London, TW9 2SS, United Kingdom

Bandai Namco are a global brand in the amusement industry. They've been supplying the Middle East region for over 30 years, creating their own market leading products like Mario Kart Arcade GP DX, and their PAC-MAN range, as well as being the exclusive distributor for Raw Thrills in the region.

Key Contact: **Mark Richardson, International Sales Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park,Outdoor Theme Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility,Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Video games, Mobile Content, Toys and Collectibles, Amusement Parks and Arcades (including VR/Real×Digital), Anime and Film, Music Production, Streaming, Licensing, and XR / Digital Innovation.**

Tel : (+44) 2083246101
Email : mrichardson@bandainamco.co.uk
Website : www.bandainamco-am.co.uk

BAY TEK ENTERTAINMENT

1077 E Glenbrook Drive, Pulaski, WI, 54162, United States

Bay Tek Entertainment was founded in 1977 and is a family owned and operated business that is driven to provide fun and profit through innovative ticket redemption games and Virtual Reality attractions. Headquartered in the heart of the Midwest, Pulaski, Wisconsin is home to Bay Tek Entertainment.

Key Contact: **Mark Lenske, International Sales Manager**

Type of Leisure Operations We Cater To: **Theme Park, FEC (Family Entertainment Centre) Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other, Visitor Attraction**

Type of Product/Services: **Immersive VR, License Digital Content, Arcade Redemption Games & Video Games & Devices, Carnival/Midway/Competition/Skill Games. Also Offer Full Distribution, Installation, and Support Services.**

Tel : (+1) 9208223951
Email : mark.lenske@thevillage.bz
Website : www.baytekent.com

BLOCKS GROUP

Al Mishaal Dist. Riyadh 14328, Quwayan 6758, Riyadh, Saudi Arabia

An age-defining construction company, meticulously creating breathtaking experiences in collaboration with those redefining the tourism and entertainment culture.We craft groundbreaking experiences for the modern age, blending our expertise and passion to create iconic landmarks. With meticulous attention to every detail, we achieve perfection and set new benchmarks in the industry.

Key Contact: **Ahmad Abdulaziz, Marketing And Communication Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor Mixed Indoor/Outdoor Facility, Culture Centre, Museum.**

Type of Product/Services: **Themed Environments and Attractions, Sculptures and 3D props, Animatronics, Rockwork and Artificial Facades, Hardscaping, Area Development for Entertainment Destinations, Structural Steel Fabrication and Installation (Blocks Steel Works / 3S), Bespoke Interior Fit-outs for F&B, Residential, and Hospitality Projects (Form by Blocks).**

Tel : (+966) 118100084
Email : ahmadabdulaziz@blocksgroup.com
Website : blocksgroup.com

MANUFACTURER/SUPPLIER MEMBERS

BOB'S SPACE RACERS, INC.

427 Whac-A-Mole Way, Holly Hill Florida, Florida, 32117, United States

At BSR, we bring decades of expertise in delivering quality games and management services for the arcade, park, and trailer industries. We prioritize personalized service, reliability, and innovation to grow your business. Backed by award-winning support, we stand behind our products 100%. That's the Bob's way!

Key Contact: **David Sandstorm, VP, International Sales**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park Water Park, FEC - Family Entertainment Centre Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility.**

Type of Product/Services: **Arcade Redemption Games, Attendant-free Games, Park & Building Skill Games, Trailer-mounted Game Units, Rental Game Equipment, Hand Sanitizer Stations.Custom Game Design & Fabrication for Parks and Corporate Promotions, Game Management Consulting (Site Selection, Merchandising, Capacity Planning), Parts Supply & Long-term Maintenance Support, Technical Assistance for Operation and Upkeep.**

Tel : **(+1) 3866770761**
Email : **daves@bobsspaceracers.com**
Website : **www.bobsspaceracers.com**

BOLDMOVE NATION

Blankenbergse Steenweg 10 Zuienkerke, West-Vlaanderen, 8377, Belgium

Specializing in themed rides and attractions, we deliver immersive experiences to enjoy with family and friends. The combination of proven technologies with creative concepts and fun stories results into unique attractions or themed areas. Products include interactive walkthroughs, (media) dark rides with trackless ride system and Spinfinity family coaster.

Key Contact: **Benoit Cornet, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility Aquarium, Culture Centre, Museum.**

Type of Product/Services: **Interactive Dark Rides (e.g., Smash & Reload), Trackless Vehicle Systems, Spinfinity Family Coasters, VR/AR Attractions (WaterSlider VR, AR Hybrid Quest, AR Dino Portal), Compact Attractions (XXS Ride), Turnkey Themed FEC/Park Design & Master Planning, IP & Storytelling Development, Media/Content Production, Ride System Engineering, Merch & Retailtainment Concepts (Houba City/Store+), Technical Installation, Ongoing Maintenance & Consulting.**

Tel : **(+32) 493120907**
Email : **ben@boldmove-nation.com**
Website : **www.boldmove-nation.com**

BRC IMAGINATION ARTS

3400 W. Olive Ave., Ste 220 Burbank, CA, 91505, United States

BRC is a full-service experiential strategy, design and production firm that translates brand and cultural stories into transformative, human experiences. For over 40 years, we've created industry leading brand experiences, museums, expo pavilions and cultural attractions, helping our clients build more meaningful, enduring relationships with audiences around the globe.

Key Contact: **Donna Davidson, Executive Development Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park Visitor Attraction, Culture Centre, Museum**

Type of Product/Services: **Experiential Strategy & Planning, Experiential Design, Experiential Production, Experiential Marketing, Attraction Planning & Design, Storytelling, Brand Development, Media Production, Creative Production, Exhibition Design, Exhibition Production, Scenography**

Tel : **(+1) 8188418084**
Email : **ddavidson@brcweb.com**
Website : **www.brcweb.com**

MANUFACTURER/SUPPLIER MEMBERS

CHEER AMUSEMENT (NANJING) CO., LTD

No.53 Wangshu Road, Airport Industrial Park, Lokou, Jiangning District Nanjing, Jiangsu, 211113 China

Since 1994, CHEER AMUSEMENT has specialized in designing, manufacturing, installation and affordable indoor playground equipment for commercial applications. With a 1,200,000 sq.ft. manufacturing base and more than 1000 employees, we are a world-leading entertainment equipment manufacturer, setting the standard for development in China's entertainment industry along our journey.

Key Contact: **Ben Peng, Senior Sales Director**

Type of Leisure Operations We Cater To: **FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Other.**

Type of Product/Services: **Participatory Play Equipment, Children's Play Elements, Climbing Walls, Inflatables, Interactive Sports/Zip Lines/Ropes/Adventure Courses, Toddler Play Areas, Trampolines.**

Tel : (+86) 18795982358
Email : ben@playground.cn
Website : www.playground.cn

CLIP 'N CLIMB

Eden Works, Colne Rd, Kelbrook, Lancashire, BB18 6SH, United Kingdom

Clip 'n Climb is the international market leader in fun climbing and has built up a profile that is synonymous with fun, quality and safety. Launching in New Zealand in 2005, Clip 'n Climb has revolutionised active play, with 360 centres in more than 50 countries around the world.

Key Contact: **Hannah Tipler, Marketing Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC - Family Entertainment Centre, Mixed Indoor/Outdoor Facility, Trampoline Park.**

Type of Product/Services: **Family Entertainment, Children's Play Elements, Interactive Climbing Walls, Trampolines, Auto-Belay Systems, Ninja Courses, Locker Room Solutions, Franchise/Licence/White-Label Centre Development including Design, Installation, Training, Marketing Support, Maintenance & Spare Parts, Corporate/Education/Party Programs, Café Fit-out.**

Tel : (+44) 1282444800
Email : h.tipler@epclimbing.com
Website : www.clipnclimb.com

DELTA STRIKE LASER TAG

1/370 Colombo Street, Christchurch, New Zealand, 8023, New Zealand

Delta Strike, a global leader in laser tag systems since 2002, serves over 450 customers worldwide. The Genesis System features a sleek sci-fi battlesuit, wireless charging, and the market's most engaging Video Base Stations. For repeat customer excitement, Genesis is the ultimate choice in laser tag innovation.

Key Contact: **Alberto Diaz, Business Development Director - MEA & Latin America**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park FEC – Family Entertainment Centre, Play Area/Soft Play/ Indoor, Trampoline Park.**

Type of Product/Services: **Commercial Laser Tag Systems, (Genesis Phasers, Vests, Wireless Chargers, Remotes), Laser Tag Arena Components (Video Base Stations, Hex Base Stations, Energy Gates, Smart/Micro/Nano Targets), Mobile Laser Tag Systems (Wi-Fi Control, Scoreboard Screens, Charging/Storage Cases), Arena Intelligence Modules, Immersive VR/MR Turnkey Attractions, Laser Tag Arena Design/Consulting, System Software & Online Booking/POS Integration, Global Installation, Training, Maintenance & Spare-Parts Support.**

Tel : (+52) 14491967570
Email : alberto@deltastrike.com
Website : www.deltastrike.com

MANUFACTURER/SUPPLIER MEMBERS

DOF ROBOTIK SAN AS. (DOF ROBOTICS INC.)

Osmangazi Mahallesi, 2644 No:1, Kirac, O-3, Esenyurt, 34522, Turkey

DOF Robotics revolutionizes entertainment with award-winning VR/AR attractions, motion simulators, and interactive games. With over 350 global installations in 56+ countries, we deliver innovative, patented, cost-effective solutions that captivate audiences and elevate amusement venues worldwide.

Key Contact: **Habib Elias Ajit Aissa, Regional Sales Manager**

Type of Leisure Operations We Cater To: **Theme Parks, Amusement Parks & Waterparks, Family Entertainment Centers (FECs) & Arcades, Shopping Malls & Retail Entertainment Venues.**

Type of Product/Services: **Flying Theaters, Dark Rides, Immersive Tunnels, Panorama Theaters, Dome Theaters, XD/4D Theaters, 6-Axis Motion Simulators, VR & AR-Based Attractions, Interactive Simulation Rides, Arcade/Video Ride Systems, Ride Design & Engineering, Turnkey Project Design, Content/Media Production, Installation, Maintenance & Training, Industrial/Healthcare Robotic Systems.**

Tel : (+90) 5377216610
Email : elias@dofrobotics.com
Website : www.dof.com.tr

ECO MIDDLE EAST ENGINEERING SERVICES LLC

Office 2311 & 2312, Churchill Executive Tower, Al Abraj Street Business Bay, Dubai, 410519, United Arab Emirates

ECO Middle East Engineering Services LLC is a Level I Inspection Body (IB) Accredited by Emirates International Accreditation Centre (EIAC) in accordance with the requirements of ISO/IEC 17020:2012 to undertake the inspection of Amusement and Fairground Equipment.

Key Contact: **Yasir Hamid Wani, Commercial Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park,Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility, Trampoline Park.**

Type of Product/Services: **Third Pary Inspection Services On Amusement Rides And Devices.**

Tel : (+971) 42956657
Email : commercial@eco-middleeast.com
Website : eco-middleeast.com

EIWAA MARINE AND INDUSTRIAL CONSULTANCY FZC

Crystal Plaza Tower, Sharjah, Rolla, 41524, United Arab Emirates

EIWAA Third Party Inspection Service, based in the UAE with branches in Saudi Arabia, Bahrain, and Kuwait, offers NDT/NDE inspection, rope access, bolt torquing, remote scanning, and dimensional surveys for amusement rides. Their services include thermography, noise/vibration monitoring, and various non-destructive inspections, all adhering to BS EN standards.

Key Contact: **Ajith Kumar Pillai, Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Architecture and Design, Engineering, Ride Testing/Inspection and Safety Inspection**

Tel : (+971) 65264301
Email : operations@eiwaaconsultancy.com
Website : www.eiwaagroup.com

MANUFACTURER/SUPPLIER MEMBERS

EVENT LAB FZ LLC

Creative Tower Fujairah, Fujairah Freezone, 454483, United Arab Emirates

At eventlab, we have revolutionised staffing and recruitment services since our inception in 2013. Founded by two event professionals with a mission to bridge the gap between freelancers and event agencies, eventlab has since become the leading provider in the industry.

Key Contact: **Peter Michael Boyack, Commercial Director - MENA**

Type of Leisure Operations We Cater To: **Theme Park, Visitor Attraction, Culture Centre, Museum**

Type of Product/Services: **Staffing, Recruiting**

Tel : **(+971) 45656034**
Email : **peter@eventlab.me**
Website : **www.eventlab.me**

FABBRI GROUP

Via Dell'Artigianato, 198 Calto, Rovigo, 45030, Italy

Fabbri Group, located in Italy, has been in the market since more than 60 years, with more than 1500 units sold and installed all over the world. Fabbri Group provides design, 100% Italian manufacturing, an efficient after sales service; specialized in the manufacturing of Giant Wheels and special projects.

Key Contact: **Gianluca Fabbri, President**

Type of Leisure Operations We Cater To: **Indoor Theme Park, FEC (Family Entertainment Centre), Visitor Attraction**

Type of Product/Services: **Booster, Drop Towers, Giant Wheels, Ferris Wheels, Family Rides**

Tel : **(+39) 0425805452**
Email : **gianluca@fabbrigroup.com**
Website : **www.fabbrigroup.com**

FLANDERS INVESTMENT & TRADE, EMBASSY OF BELGIUM IN THE UAE

Office 1303 A, 13th Floor, Nassima Tower, Trade Center 1, Sheikh Zayed Road, Dubai, PO Box 9477, United Arab Emirates

We facilitate UAE investment projects in Flanders (Belgium) and we give support to Flanders-based export companies. Looking to give your export business or foreign investments a boost. Flanders Investment & Trade (FIT) is your partner in internationalisation in Flanders – Belgium's northern region – and beyond.

Key Contact: **Sherlynn Dcosta, Trade Advisor**

Type of Product/Services: **Business Setup Consulting, Identification of Market Opportunities, International Market Research & Partner Matchmaking, Organisation of Trade Missions/Fares/ Seminars, Financing Support for Export Prospection, Marketing of Flanders Innovation globally, Logistics & Distribution, Consultancy, and Integration into Local Business Networks**

Tel : **(+971) 45468711**
Email : **dubai@fitagency.com**
Website : **welcome.flandersinvestmentandtrade.com**

MANUFACTURER/SUPPLIER MEMBERS

FORREC

219 Dufferin Street, Suite 100c Toronto, Ontario, M6K 3J1

At FORREC we create compelling guest experiences rooted in imagination and immersive storytelling for location-based entertainment including theme parks, visitor attractions, water parks, branded experiences, mixed-use+, entertainment, and resorts.

Key Contact: **Linda Hung, Vice President - Business Development**

Type of Leisure Operations We Cater To: **Theme Park, Water Park, Culture Center, FEC (Family Entertainment Center)**

Type of Product/Services: **Design (Master Planning to Attractions)**

Tel : (+416) 8162770
Email : LHung@forrec.com
Wesite : www.forrec.com

THE GLOBAL ENTERTAINMENT MANUFACTURER

ST.60 Sahhab, Amman, 11511, Jordan

Global Entertainment Manufacturer (GEM), based in Amman, Jordan, designs and builds custom indoor playgrounds, trampoline parks, and interactive attractions. Founded by industry experts with experience since 1989, GEM has completed over 160 turnkey projects—including 50+ in Saudi Arabia—focused on safety, quality, and tailored entertainment solutions.

Key Contact: **Muhammed Mubin Sabu, R&D Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Center), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Visitor Attraction, Culture Center, Museum**

Type of Product/Services: **Participatory Play Equipment, Children's Play Elements, Climbing Walls, Interactive Sports/Zip Lines/Ropes/Adventure Courses, Mazes, Toddler Play Areas, Trampolines**

Tel : (+962) 791008716
Email : m.mubin@gem-jo.com
Website : www.gemplay.com.jo

GREAT COASTERS INTERNATIONAL INC.

2627 State Route 890, Sunbury, Pennsylvania, 17801, United States

Great Coasters International Inc. (GCII) builds high-quality, smooth, and innovative wooden coasters for theme parks worldwide. Known for meticulous attention to detail, GCII offers a lifetime of service and support. With the introduction of Titan Track, GCII now creates hybrid coasters, blending wood and steel for enhanced performance and design.

Key Contact: **Olivia Hain, Director of Public Relations/Marketing**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Bumper Cars, Carousels, Dark Rides, Go-Karts, Extreme Amusement Rides, Kiddie Rides, Major Rides**

Tel : (+1) 5702869330
Email : olivia@greatcoasters.com
Website : www.greatcoasters.com

MANUFACTURER/SUPPLIER MEMBERS

GOSETTO SRL

Via Montegrappa 122, Mosnigo, 31010, Italy

Founded in 1977 by the Gosetto brothers, Gosetto specializes in designing and manufacturing innovative indoor and outdoor rides for theme parks and carnivals. Made entirely in Italy with cutting-edge technology, all rides are customizable and meet EN13814:2019 standards. Gosetto holds ISO 3834-2 and EN1090 certifications, ensuring top-tier quality.

Key Contact: **Andrea Casagrande, Sales Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Bumper Cars (Adult and Mini), Carousels, Flat Rides (Major and Kiddie), Go-kart Tracks, Trains/Trams/Trolleys, Dark Rides, Fun Houses, Party Dance Rides, Convoy Rides, Ride Customization, Fiberglass Components Manufacturing, ISO 3834-2 Stainlessfabrication, EN 13814-compliant Ride Design & Engineering, Global Installation & Support**

Tel : (+39) 0438892847
Email : andrea.casagrande@gosetto.com
Website : www.gosetto.com

GRS SRL (DWTC BRANCH)

Sheikh Rashid Tower, Floor 19 DWTC, Dubai, United Arab Emirates

GRS is an international research and strategic advisory firm with its offices in Italy, UAE and UK. GRS is specialized in Experience Optimization through quantitative and qualitative research. We provide accurate understanding and data-driven insights to support organizations in their decision making.

Key Contact: **Elisa Giachelle, Partner**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Center, Visitor Attraction, Aquarium, Culture Center**

Type of Product/Services: **Market Research/Surveys, Customer Insights & Experience Optimization, Quantitative & Qualitative Research, Market Outlook Reports (e.g., KSA, UAE Leisure), Data Analytics & Visualization, Customer Journey Mapping, Mystery Shopping & User Testing, CX Strategy & Advisory**

Tel : (+971) 568488847
Email : elisa.giachelle@grsnet.it
Website : grsnet.eu

GUANGDONG IPLAY TECHNOLOGY CO.LTD

6/ F, Building 21, Hanzu Robot Intelligent Manufacturing Center,No.3, Erzhi Industrial Avenue, Xiha Foshan, Guangdong, 52800, China

Guangdong Iplay Technology Co. Ltd, was established in 2010. (China Factory) 30 years' experience integrated enterprise in researching, specialized in R&D, manufacturing, operating, and marketing entertainment game machines. It is located in Shunde District, Foshan City, over 6500 square meters factory, and 48 staff, including senior engineers and technicians.

Key Contact: **Janos Feher, President**

Type of Leisure Operations We Cater To: **Family Entertainment Centre, Trampoline Park, Bowling Centre**

Type of Product/Services: **Boxer, Cranes, Dance Machine, Video and Skill Games, AR, VR, Coin-Operated Machines (Non-Game), Software, Redemption Prizes, Plush**

Tel : (+86) 75726662625
Email : janos@i-play.hk
Website : www.i-play.hk

MANUFACTURER/SUPPLIER MEMBERS

HELIX SOLUTIONS EMEA-DMCC (EMBED International PTY LTD.)

1903 Cluster Y, Jumeirah Lake Towers, Dubai, 393517, United Arab Emirates

Embed is the worldwide leader of the integrated cashless business management systems and solutions for family Entertainment, Amusement and Attractions.

Key Contact: **Hannah Gabor, Marketing Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **TOOLKIT Software Platform, Smarttouch Card Readers, Mobile Wallet Solutions, RFID Wristbands, Self-Service Kiosks, Point-Of-Sale Systems, Cashless Payment Infrastructure, Game Management & Prize Inventory Tools, Guest Party Planning/ Bookings, Real-Time Analytics & Revenue Management, Hygiene Defence Systems, Global Installation & Support**

Tel : (+971) 567143387
Email : hannah.gabor@embedcard.com
Website : embedcard.com

HELLO PARK

Meydan Grandstand, 6th Floor, Meydan Road, Nad Al Sheba, Dubai, United Arab Emirates

Hello Park is an international chain of phygital parks offering a new concept of family entertainment by combining traditional activity parks with cutting-edge interactive technologies and immersive projections. Today, the company has over 50 partners across 21 countries.

Key Contact: **Alex Zavyalov, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Family Entertainment Centre, Play Area/Soft Play/ Indoor Mixed Indoor/Outdoor Facility, Trampoline Park**

Type of Product/Services: **Immersive Phygital Parks with Interactive Projection Games. Franchise Support & Master Planning, Software/App Ecosystem with Avatar-Driven Content Updates, Installation, Training, Marketing Support.**

Tel : (+971) 561571832
Email : a.zavyalov@hello.io
Website : hello-park.io

HOUSE OF EXPERIENCE

Riyadh Almalqa, Turki Alawal, Almalqa, Riyadh, Saudi Arabia

Founded in 2018, House of Experience is Saudi Arabia's leading experiential agency—designing, managing, and operating world-class events, entertainment, sports, and cultural venues with immersive concepts and strategic precision. Since 2018, they have transformed visions into standout destinations, delivering end-to-end event management, venue operations, and audience engagement that redefine shared experiences. Their multidisciplinary team combines creativity, operational expertise, and strategic insight to produce impactful experiences across entertainment, sports, culture, and exhibitions.

Key Contact: **Ali Alsalman, CEO**

Type of Leisure Operations We Cater To: **Theme Parks, Waterparks, FEC (Family Entertainment Centre), Visitor Attractions, Seasonal Attractions**

Types of Products & Services: **Experiential event and destination design, conceptual and strategic planning, creative production, immersive venue and exhibition development. End-to-end operations management, audience engagement programming, venue management and operations, marketing and promotional support, staff training and consultancy.**

Tel : (+966) 550275055
Email : ceo@bvh.sa
Website : www.hoe.sa

MANUFACTURER/SUPPLIER MEMBERS

HPS PLAY TRADING LLC

Prime Business Center Tower A-602, 6th Floor, Jumeirah Village Circle, Dubai, United Arab Emirates

HPS Play Company leads in bespoke playgrounds and adventure spaces, offering innovative solutions like soft play areas, trampolines, climbing walls, and ziplines. Based in Abu Dhabi, we deliver turnkey projects, including design, theming, and installation, transforming spaces into unique, entertaining, and revenue-generating attractions for indoor and outdoor venues.

Key Contact: **Thomas Mitmannsgruber, CEO**

Type of Leisure Operations We Cater To: **Indoor & Outdoor Playgrounds, Toddler Soft-Play Zones, Adventure Playgrounds, Trampoline Parks, Laser Tag Arenas, Climbing Walls & High-Rope Courses, Immersive Interactive Projection Game Zones, VR Park Play Areas, Hotel/Resort Play Installations, Zoo & Aquarium, Adventure Trails, Shopping-Mall, Family Entertainment Centers, Airport Children's Clubs, Themed FECs & Adventure Parks.**

Type of Product/Services: **Carnival/Midway/Competition/Skill Games; Bowling; Children's Play Elements, Climbing Walls, Inflatables, Interactive Sports/Zip Lines/Ropes/Adventure Courses, Laser Tag, Mazes, Miniature Golf, Paintball, Plastic Cards, Trampolines, Carts/Cycles, Bumper Cars, Go-Karts.**

Tel : **(+971) 505501634**
Email : **thomas.m@hpsplayco.com**
Website : **hpsplayco.com**

I.E. PARK SRL SOLI BUMPER CARS

Via Don P.Borghi 3 Praticello Di Gattatico (Re), 42043, Italy

Since 1965, I.E. PARK – SOLI manufactures and supplies amusement rides, rollercoasters and bumper cars for indoor and outdoor amusement parks all over the world. Thanks to the high content of quality, design, technical innovations, aftersale service, the whole range of products has experienced a continuous and growing success.

Key Contact: **Andrea Munari, President**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Family Entertainment Centre**

Type of Product/Services: **Bumper Cars, Family Attractions (Carousels, Miniswing, Roller Coasters, Flume Rides, And Many Others)**

Tel : **(+39) 0522678526**
Email : **andrea.munari@iepark.com**
Website : **www.iepark.com**

ICE-WORLD

Weteringpad 7 Soest, Utrecht, 3762 EN, Netherlands

Global supplier and ice rink specialist consultant for ice rink solutions, both temporary and permanent. With extensive experience and reference projects in the GCC region, the market leader in the region for any type of ice rink concept.

Key Contact: **Martijn Reef, Regional Sales Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Family Entertainment Centre, Mixed Indoor/Outdoor Facility, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Ice Rinks /Winter-Themed Concepts. Portable Buildings, Architecture and Design, Engineering, Fog/Snow/Ice, Ice Shows/Productions**

Tel : **(+31) 355480500**
Email : **martijn.reef@ice-world.com**
Website : **www.ice-world.com**

MANUFACTURER/SUPPLIER MEMBERS

ICOMBAT LASER TAG

1707 Post Oak Blvd, Suite 533 Houston, TX, 77056, United States

iCOMBAT has been a leader in the laser tag industry for over 18 years, serving more than 2,000+ clients across the globe. We offer a range of laser tag systems (Tactical, Battle Quest & Mobile) with a comprehensive software suite and dedicated global support team.

Key Contact: **Stephanie Villers, Marketing Lead**

Type of Leisure Operations We Cater To: **Outdoor Theme Park, Water Park, Family Entertainment Centre, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Commercial Laser Tag Equipment Including Tactical, Battle Quest, Mobile Systems, Hero Wrist Taggers, Irsmg/Irshotgun/Irsaw Firearms, Wireless Vests and Headbands, Recoil And CO_2-Enhanced Gear, Fully Customizable Ice Gameplay Software With Audio/Light Control, Online Leaderboards and Global Ranking etc.**

Tel : **(+1) 8889501221**
Email : **stephanie@icombat.com**
Website : **www.icombat.com**

INTAMIN AMUSEMENT RIDES

Landstrasse 126 Schaan, 9494, Liechtenstein

Intamin Amusement Rides is a worldwide leading manufacturer and supplier of roller coasters, water rides, immersive attractions, round rides and vertical attractions.

Key Contact: **Gerard Slenders, VP**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC – Family Entertainment Centre, Mixed Indoor/Outdoor Facility, Visitor Attraction, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Roller Coasters, Water Rides, Immersive Attractions, Round Rides, Vertical Attractions, Simulation and Motion Theatre Rides, Extreme Rides**

Tel : **(+423) 2370343**
Email : **gerard.slenders@intamin.com**
Website : **www.intamin.com**

INTERCARD

1884 Lackland Hill Pkwy, Saint Louis, Missouri, 63146-3569, United States

Intercard introduced cashless technology to the amusement industry and has been leading the way for 30+ years. Our cashless systems will increase customer spending and satisfaction and boost revenues by up to 30%.

Key Contact: **Lynda Sherrod, Marketing Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Cashless Software For Amusement Industry**

Tel : **(+1) 3142758066**
Email : **lbrotherton@intercardinc.com**
Website : **www.intercardinc.com**

MANUFACTURER/SUPPLIER MEMBERS

INTERGAME LIMITED

Office Block 1, Southlink Business Park, Hamilton Street, Oldham OL4 1DB, United Kingdom

The prime media partner of MENALAC and official trade publication of DEAL trade show, this monthly B2B magazine covers the global amusement and attractions industry. Distributed in over 100 countries, it's the leading resource for leisure industry professionals in print and online.

Key Contact: **David Snooky, Director**

Type of Leisure Operations We Cater To: **Theme Park, Water Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Intergame Magazine**

Tel : **(+44) 1616330100**
Email : **snookyoafc@gmail.com**
Website : **www.intergameonline.com**

KCC ENTERTAINMENT DESIGN

Papestraat 1, Wielsbeke, West-Vlaanderen, 8980, Belgium

For 25 years, KCC Entertainment Design has specialized in creating world-class leisure and entertainment destinations. Renowned for blending creativity with functionality, we've successfully completed over 270 projects worldwide, partnering with clients from the initial concept phase to the grand opening.

Key Contact: **Reinhart Viane, Business Development Director**

Type of Leisure Operations We Cater To: **Water Park, FEC (Family Entertainment Centre), Visitor Attraction**

Type of Product/Services: **Concept-To-Completion Services for Theme Parks, FECs, Water Parks, Snow Parks, Retailtainment, and Edutainment Venues, including Design, Theming, Engineering, Project Management, and Turnkey Execution.**

Tel : **(+32) 56439843**
Email : **reinhart@kcc.be**
Website : **www.kcc.be**

LAI GAMES

4101 Live Oak Drive, Suite 100A, The Colony, Texas, 75072, United States

LAI Games was born during the growth of Australia's amusement industry and has been producing arcade and amusement games for over 60 years. The company develops, manufactures, and sells coin and card operated prize merchandising games, ticket redemption games, photo booths, kiddie rides, and video and novelty games.

Key Contact: **Allison Timberlake, Senior Marketing Manager**

Type of Leisure Operations We Cater To: **Theme Park, Water Park, FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre**

Type of Product/Services: **VR, Arcade & Video Games, Redemption Games, Midway & Skill Games**

Tel : **(+1) 4695217000**
Email : **allisont@laigames.com**
Website : **www.laigames.com**

MANUFACTURER/SUPPLIER MEMBERS

MARTIN & VLEMINCKX LTD

1250 Rene-Levesque Blvd West, Suite 2200 Montreal, Quebec, H3B 4W8, Canada

Martin & Vleminckx a world leader in the Amusement Park Industry, offers a wide range of products and services that include, design fabrication and delivery of innovative patented thrill rides, design, fabrication and delivery of traditional wooden roller coasters, and installation of amusement ride systems.

Key Contact: **Nathan Jones, President**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Family Entertainment Centre, Mixed Indoor/Outdoor Facility, Visitor Attraction**

Type of Product/Services: **Extreme Amusement Rides, Major Rides, Roller Coasters, Service, Repair & Parts**

Tel : **(+1) 5147330060**
Email : **n.jones@mvrides.com**
Website : **mvrides.com**

MATTEL GLOBAL LIVE EVENTS TEAM

333 Continental Blvd, El Segundo, CA90245, 90245, United States

Mattel is a global leader in toys and family entertainment, known for iconic brands like Barbie, Hot Wheels, Fisher-Price, and UNO. With a diverse range of toys, content, and experiences, Mattel partners with top retailers and e-commerce companies to inspire and empower generations since 1945.

Key Contact: **Alexis Jimenez, Senior Coordinator, Global Live Events**

Type of Leisure Operations We Cater To: **FEC (Family Entertainment Centre), Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Other**

Type of Product/Services: **Entertainment and Theatrical Shows, Immersive Pop-up Experiences, Game-day Activations.**

Tel : **(+1) 16267566420**
Email : **alexis.jimenez@mattel.com**
Website : **about.mattel.com**

McARTHUR RETAIL DEVELOMENT SPECIALISTS

Office 1828, Bur Juman Business Tower, Khalid Bin Al Waleed Road, Dubai, 451885, United Arab Emirates

McARTHUR Retail Development Specialists provides comprehensive strategic advisory and retail leasing services to developers of retail destinations including: Strategic Retail Development Planning, Retail Leasing Services, Retail Real Estate Management & Marketing Solutions, Operating Mall Review & Turnaround Solutions.

Key Contact: **Phil McArthur, Founder & Chairman**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, Family Entertainment Centre, Play Area/Soft Play/Indoor Play Area, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Center, Aquarium, Culture Center, Museum**

Type of Product/Services: **Strategic Retail Development Planning, Retail Leasing Services, Retail Real Estate Management & Marketing Solutions , Operating Mall Review & Turnaround Solutions**

Tel : **(+971) 502221503**
Email : **phil@mcarthur-specialists.com**
Website : **www.mcarthur-specialists.com**

MANUFACTURER/SUPPLIER MEMBERS

MEGA PHYSICAL & MECHANICAL TESTING LLC

Head Office Office No. 06 Mezzanine Floor, Abu Saif Business Center (Old Labor Office) Dubai, United Arab Emirates

Mega is a 3rd party inspection Company that introduces all safety certificates for the amusement rides & devices which is accredited from EIAC . We are working with more than 100 famous companies inside & outside UAE. We provide best service for our clients.

Key Contact: **Eman Amin, Marketing Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Inspection, Testing and Training**

Tel : **(+971) 588391571**
Email : **eman@mega-testing.com**
Website : **www.mega-testing.com**

METAAGROW

423, 'B' Wing, Chintamani Plaza, Chakala, Andheri-Kurla Road, Andheri (East) Mumbai, Maharastra, 400099, India

METAAGROW is the World's First Operations & Maintenance Software for Bowling and Family Entertainment Centers. METAAGROW helps minimize downtime, streamlines daily operations, and ensures efficient functioning across multiple locations, helping operators digitalize processes for the smooth management of games and attractions.

Key Contact: **Rohan Mathur, Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attraction**

Type of Product/Services: **Operations & Maintenance Software Platform, Mobile And Web Dashboards With Real-Time Analytics, Team Collaboration Tools, Cloud-Based Saas With Unlimited Users/Storage, Installation, Training, Ongoing Support**

Tel : **(+91) 7322261040**
Email : **rohan@metaagrow.com**
Website : **www.metaagrow.com**

MOBARO

Hasselager Centervej 13, 1. Viby Midt, DK-8260, Denmark

Used daily by more than 300 visitor attractions globally, Mobaro serves as the dynamic hub of essential safety, maintenance, and operations procedures. Based on continuous collaboration with the international attraction community, Mobaro's industry-specific software and consultancy service enables clients to offer safe, secure, high-quality experiences.

Key Contact: **Henrik Have, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility,Trampoline Park, Bowling Centre, Other, Visitor Attraction**

Type of Product/Services: **Comprehensive CMMS Software for Attractions (Web + Mobile App) With Digital Checklists, Work-Order Management, Compliance Tracking, Ride Ops/Downtime Logging, Task Scheduling, Dashboards, API Integration.**

Tel : **(+45) 71999499**
Email : **hh@mobaro.com**
Website : **mobaro.com**

MANUFACTURER/SUPPLIER MEMBERS

PICO PLAY

Unit 2B, 11-13 Station Street, Nerang Gold Coast, QLD, 4211, Australia

Pico Play is a team of passionate and innovative attraction professionals. We specialise in delivering themed attractions and entertainment for theme parks, nature parks, water parks, family entertainment centres, surf parks and experiences.

Key Contact: **Susan Anehagen (Business Development Manager), Jessica Farias (Marketing Specialist)**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Concept & Feasibility Studies, Masterplanning, Schematic Design, Construction Drawings, Specialty Fabrication, Creative Engineering, Thematic Construction, Sculptures, Scenic Art, Props, Facades, Live Experiences & Guest Engagement Offerings - Narrative-Driven Performances, Stunt Shows, Animal Conservation Presentations, Show Control Systems, Media Production, Recruitment/Training Support, Operations Mapping & Business Planning**

Tel : (+61) 756881050
Email : susan.anehagen@pico.com
Website : www.pico-play.com

PORVIVA GERMANY GMBH

Adamsmuehle 1, Wuerselen 52146, Germany

Porviva specializes in the development, production and distribution of materials and product solutions that play an important role in shaping the water and theme parks of our future. Our focus areas include customized floor coatings and waterproofing solutions for water and theme parks, buildings, transport infrastructure and industry.

Key Contact: **Gerd J. Pleyers, Civil Engineer and CEO**

Type of Leisure Operations We Cater To: **Theme Park, Indoor Theme Park, Outdoor Theme Park, Water Park, FEC – (Family Entertainment Center), Museum**

Type of Product/Services: **High-Performance Pool Coatings, Indoor/Outdoor Waterproof Coatings, Cooling-Effect Surfacing, Metal and Natural Stone Coatings, Pore-Filling Primers and Transparent/Color Topcoats, Decorative Granules and Metal Spatula Finishes, Concept Consulting for Theme Parks & Waterparks, Installation Services, Technical Training and 24/7 Support.**

Tel : (+49) 15152633133
Email : office@porviva.com
Website : www.porviva.com

PREMIER RIDES

1007 East Pratt Street, Baltimore, MD, 21202, United States

Premier Rides, founded in 1995, designs and delivers innovative, thrilling attractions globally. With offices world-wide, Premier emphasizes safety, client-focused service, and technical excellence. Our 24/7 support and experienced team ensure seamless project management, from design to maintenance, prioritizing client needs and cutting-edge technologies.

Key Contact: **Sara Seay, Vice President**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme**

Type of Product/Services: **High-Tech Roller Coasters (Magnetic Launch, Sky Rocket I/II/III, Catapult, Dark Ride Launch), Traditional Roller Coasters, Water Rides, Observation Wheels & Towers, Special-Effect Dark Rides, Ride Systems, Queue Gate Systems, Magnetic Brakes. Premier Service™ Maintenance & Spare Parts, Rapid-Response Network, Ride/Vehicle Refurbishment and Upgrades, Legacy Ride Restoration, Ride Control & FE Engineering, Inspections and Testing, Track and Structural Repairs, Ride Relocation, Turnkey Chain & Sprocket Replacement**

Tel : (+1) 4109230414
Email : sseay@premier-rides.com
Website : premier-rides.com

MANUFACTURER/SUPPLIER MEMBERS

PROFUN

210 West Main St, Suite 201, Tustin, California, 92780, United States

ProFun is an advisory and management firm specializing in the operation of attractions, including theme parks, water parks, museums, location-based entertainment, brand centers and other attractions. We are one of the most experienced operators in the region having planned, opened or operated many of the region's entertainment and cultural venues.

Key Contact: **Mike Oswald, Partner**

Type of Leisure Operations We Cater To: **Theme Parks & Water Parks, Surf Pools, Museums & Aquariums, Commercial Attractions & Destination Resorts, Location-Based Entertainment, Live Events and Entertainment Venues.**

Type of Product/Services: **Operational Consulting for Visitor Attractions (Theme Parks, Water Parks, Museums, Aquariums, Surf Parks), Feasibility Studies, Business Planning, Staffing Optimization, Revenue Maximization Strategies, Performance Benchmarking Turnkey Attraction Management & Advisory Services including Pre-Opening Support, Onsite Operational Teams, Training Programs, Implementation Oversight, Project Management, and Guest Experience Enhancement.**

Tel : (+1) 7148321201
Email : moswald@profun.com
Website : www.profun.com

PROLOGIC FIRST SOFTWARE LLC

109 Opal Tower, Burj Khalifa Street, Business Bay, Dubai, United Arab Emirates

Prologic First has been an authorized exclusive partner of Gateway Ticketing Systems Inc., USA since 2008 in the MENA region. We supply Ticketing Software, Access Control, Lockers, F&B and Retail Operations though a unified application to the leisure industry.

Key Contact: **Amit Sharda, Chief Operating Officer**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Galaxy Ticketing & Access Control Systems, Wristbands, Point of Sale Software, Web-Based Services, Systems & Devices, Lockers, Galaxy F&B and Galaxy Retail**

Tel : (+971) 43366345
Email : amit@prologicfirst.ae
Website : www.prologicfirst.com

PROSLIDE TECHNOLOGY INC

150 - 2650 Queensview Drive, Ottawa, Ontario, K2B 8H6, Canada

ProSlide is the global leader in water ride design and manufacturing, revolutionizing the industry with patented innovations like HydroMAGNETIC ® water coasters, TORNADO ® funnel slides, and RocketBLAST ® systems—all built for performance, thrill, and longevity. For over 35 years, they've partnered with top-tier parks worldwide—including Atlantis Aquaventure, Universal, Disney, and Siam Park—to deliver award-winning, world-class water attractions backed by full-service support from concept to commissioning.

Key Contact: **Daniel Jackson, Principal Master Planner**

Type of Leisure Operations We Cater To: **Water Park**

Type of Product/Services: **Water Ride Attractions Including Traditional Slides, Speed Slides, Serpentine Rides, Bowls, Funnels, Racers, Hybrid Water Coasters (Hydromagnetic, Rocketblast), Waves & Rivers, Aquatics Play Systems, Ride Design & Engineering, Waterpark Master Planning, Installation, Ride Verification/Commissioning, Customer Care & Parts Support, Maintenance, Sustainability and Efficiency Optimization.**

Tel : (+971) 585937747
Email : djackson@proslide.com
Website : www.proslide.com

MANUFACTURER/SUPPLIER MEMBERS

QUBICAAMF WORLDWIDE, LLC

8100 AMF Drive, Mechanicsville, VA, 23111, United States

QubicaAMF is the largest bowling equipment provider in the world with over 100 years of experience. We have installed more than 10,000 centers in 90 countries, maintain the industry's largest R&D team, and build and modernize more bowling entertainment centers than any other company in the industry.

Key Contact: **Flavio Taddia, EMEA Regional Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Bowling Equipment and Lanes, Scoring and Entertainment Systems, Center Management Software, Mini and Duckpin Bowling Solutions, Amusement Games, Installation and Modernization Services, Technical Support and Training, Turnkey Center Design and Planning.**

Tel : (+1) 8045691000
Email : ftaddia@qubicaamf.com
Website : www.qubicaamf.com

RED RAION

Via Del, Carmine 11, 20121, Milano 950241, Italy

Red Raion is a CGI studio specializing in media-based attractions, partnering with global IPs and brands. Renowned for storytelling and compelling designs, they help amusement parks, theme parks, and FECs refresh or create new content, delivering unforgettable guest experiences that become key attractions and drive visitor engagement.

Key Contact: **Valeria Rizzo, Chief Brand Officer**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park**

Type of Product/Services: **CGI Content For Media-Based Attractions, Licensed VR/XD/ Dome/Fly Films, Custom Animation and Storytelling, In-House CGI Production Services, Immersive Attraction Content Development.**

Tel : (+39) 3443477205
Email : v.rizzo@redraion.com
Website : www.redraion.com

REDEMPTION PLUS

6800 College Blvd, Suite 700, Overland Park, KS, 66211, United States

Redemption Plus is the go-to provider for all things redemption in family entertainment, offering custom design, merchandising, training, prizes, and education. With a focus on performance, we ensure the final guest experience is memorable and seamless.

Key Contact: **Michael Nowak, Chief Executive Officer**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre**

Type of Product/Services: **Redemption Merchandise and Toys, Prize Counter Design and Merchandising, Inventory Management Solutions, Technology and POS Integrations, Training and Consulting for FECs and Arcades.**

Tel : (+1) 4014999353
Email : MNowak@rinovelty.com
Website : redemptionplus.com

MANUFACTURER/SUPPLIER MEMBERS

RHODE ISLAND NOVELTY

350 Commerce Drive, Fall River, MA, 02720, United States

Rhode Island Novelty is the nation's leading designer, importer, and wholesale distributor of amusement toys, novelties, giftware, and incentive merchandise. For over 30 years, we have been dedicated to serving our customers. We provide a one-stop source for the highest quality products, innovative designs, and best pricing.

Key Contact: **Michael Nowak, Managing Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Amusement and Redemption Toys, Plush and Novelty Items, Giftware and Souvenirs, Bulk Merchandise Supply, Display Solutions, Order Fulfillment and Distribution Services**

Tel : (+1) 4014999353
Email : mnowak@rinovelty.com
Website : rinovelty.com

RIDE AND EVENT SERVICES LTD

18 Hoton Park, Wymeswold Road, Loughborough, Leicestershire, LE12 5HH, GB, United Kingdom

Ride & Event Services delivers high-quality, professional event solutions tailored to your needs. With over 60 years of experience, we provide event production, management, and equipment hire for venues, corporate, and private events. Expect professionalism, efficiency, and exceptional results—creating memorable experiences, from festivals to Winter Wonderlands.

Key Contact: **Kenny Raywood, Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Type of Product/Services: **Ride Installation and Relocation, Ride Maintenance and Inspections, Welding and Fabrication, Safety and Compliance, Consulting, EventProduction and Equipment Hire.**

Tel : (+44) 7792816873
Email : info@rideandeventservices.com
Website : rideandeventservices.com

RIDES AND FUN SRL

Via Dell'Ecologia 16, Borgo San Giacomo, Brescia, 25022, Italy

Rides and Fun is a company owned by Tomasoni Group (www.tomasoni-group.com) based in Italy and operating since 1980. We can offer a huge variety of amusement rides for Amusement Parks and Indoor Family Entertainment Centers. MENALAC Member and IAAPA Global Exhibitor. Manufacture according EN , ISO and TUV standards.

Key Contact: **Simone Tomasoni, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Carousels, Extreme Amusement Rides, Kiddie Rides, Major Rides, Roller Coasters, Service, Repair & Parts**

Tel : (+39) 0309487447
Email : rides@tomasoni-group.com
Website : www.ridesandfun.com

MANUFACTURER/SUPPLIER MEMBERS

RIDEWARE TECHNOLOGIES EST

Al Reem Tower, Office No. M12 & M13, Al Maktoum Road, Deira, Dubai, 500001, United Arab Emirates

Rideware Technologies Est. is a leading IT software development company that offers cutting-edge solutions to businesses across diverse industry verticals. With a team of highly skilled software developers, we specialize in business process automation and developing customized software applications that help our clients achieve their business objectives.

Key Contact: **Nishar K S, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility**

Type of Product/Services: **Amusement Management Software (Rideware Vi10), ERP Solutions, Point of Sale Integration, Custom Software Development, Business Process Automation, Industrial Process Automation, Cloud-Based Solutions, UI/UX Design, Digital Marketing Services**

Tel : **(+971) 564431561**
Email : **info@ridewaretech.com**
Website : **www.ridewaretech.com**

RIXEN CABLEWAY

Neufeldstrasse 9, Bergkirchen 85232, Germany

RIXEN Cableway is the world market leader in full-size cable systems for water skiing and wakeboarding, having installed over 500 facilities across six continents since the 1960s. Their end-to-end offering includes custom engineering, project planning and permitting, cutting-edge electronic controls, installation, training, and 24/7 spare-parts support—ensuring high performance, safety, and sustainability.

Key Contact: **Jakub Kondelka, Sales Director**

Type of Leisure Operations We Cater To: **Theme Park, Water Park**

Type of Product/Services: **Full-Size Wakeboard Cable Systems (Multi-Mast Setups), 2-Mast Master Series Beginner/Pro Rigs, Floating Walkways and Launch Stations, Solar Wavebreaker™ Photovoltaic Modules, Electronic Cableway Control Systems and Spare Parts Distribution. Project Consulting (Site Planning, Approvals), Technical Design, Installation, Commissioning, Safety Compliance, Training, Remote Support, and 24/7 After-Sales Service.**

Tel : **(+49) 813133569**
Email : **j.kondelka@rixencableway.com**
Website : **www.rixencableway.com**

RUGGIERI - FED

Shed N° 2 - Abdul Razzaq Mohiddin Abdulla Trading Est St.18, Al Quoz 1, Dubai, 392821, United Arab Emirates

Ruggieri, a leader in pyrotechnics, creates multimedia shows combining fireworks, sound, light, lasers, drones, and video mapping. With iconic projects like Burj Khalifa and Disneyland Paris, they innovate continuously, certified ISO 9001. Offering expert services, training, and global logistical support, Ruggieri ensures unforgettable, world-class pyrotechnic experiences.

Key Contact: **Arthur Raizin, International Business Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), and Visitor Attractions.**

Type of Product/Services: **Multimedia Pyrotechnic Shows, Fireworks Displays, Aquatic Installations, Laser and Light Projections, Video Mapping, Live Performances, Custom Event Scenography, R&D and Safety Compliance.**

Tel : **(+971) 42632179**
Email : **arthur.raizin@etienne-lacroix.com**

MANUFACTURER/SUPPLIER MEMBERS

RX GLOBAL

52-54, Quai De Dion-Bouton, Puteaux, Ile De France, 92806, France

RX France is a leading organizer of B2B and B2C trade shows, creating opportunities for business growth across 15 industry sectors with over 30 events globally. They are part of RELX, a global provider of information-based analytics.

Key Contact: **Yousif Raissac, Head Market Development / Middle East**

Type of Leisure Operations We Cater To:**Theme Park, Water Park, Retailtainment Centers, FEC (Family Entertainment Centre),**

Type of Product/Services: **MAPIC & MIPIM**

Tel : **(+33) 613783346**
Email : **yousif.raissac@rxglobal.com**
Website : **www.rxglobal.fr**

SACOA CASHLESS SYSTEM

6457 Hazeltine National Dr, Suite 130, 32822 Orlando, Florida, FL 32822
United States

Sacoa is the leading worldwide supplier of revenue management systems for the amusement, entertainment and leisure industries with more than 2400 installations in more than 70 countries. It offers customized applications to manage and control all aspects of an entertainment facility.

Key Contact: **Hiara Elias, Directors Assistant**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Systems & Devices, Wristbands, Web-Based Services, Cashless Payment Systems, Self-Service Kiosks and Card Readers, POS and Management Software, Online Booking and CRM Tools, System Integration, Installation, Training, and Global Support Services.**

Tel : **(+1) 4074991876**
Email : **helias@sacoa.com**
Website : **www.sacoacard.com**

SAFETY SKILLS TRAINING

Office 704, Palladium Tower, Cluster C, Jumeirah Lakes Towers, Dubai, 11584,
United Arab Emirates

Safety Skills Training (SST) partners with companies to meet risk management and training goals. SST ensures confidence in your team's skills and systems during emergencies, preparing them to protect others effectively. Their focus is on equipping teams with the necessary expertise for safe and efficient operations in critical situations.

Key Contact: **Scott Deisley, Managing Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **First Aid, CPR & AED Training, Pediatric First Aid, International Lifeguard Training Program (ILTP®), Lifeguard Certification Services, Aquatic Safety Consultancy and Facility Audits, Non-Destructive Pressure Testing.**

Tel : **(+971) 44560455**
Email : **scott.deisley@sstworldwide.com**
Website : **sstworldwide.com**

MANUFACTURER/SUPPLIER MEMBERS

SANDERSON GLOBAL

Level 27 / 2705, Marina Plaza, Dubai Marina, PO Box 112229, Dubai, United Arab Emirates

SANDERSON GLOBAL is an international award-winning planning & design consultant of Location Based Entertainment with more than 36+ years of proven experience delivering world renowned tourism developments, destinations, parks and attractions. Our professional services include Conceptual Design, Master Planning, Market Analysis, Feasibility Studies & Operations consulting.

Key Contact: **Peter Sanderson, Development Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Conceptual Design, Master Planning, Market Analysis, Feasibility Studies & Operations Consulting, Architecture & Design, Economic, Engineering, Management/Planning, Market Research/Surveys, Staffing**

Tel : (+971) 45595716
Email : peter.s@sandersonglobal.com.au
Website : www.sandersonglobal.com.au

SAUDI ENTERTAINMENT AND AMUSEMENT (SEA) EXPO

Office 502, Al Madar Building Ad Diyar Street, Al Ulaya District, Riyadh, 12611, Saudi Arabia

For over six years, SEA Expo in Riyadh has been the premier platform for global brands to connect with top regional buyers, showcase innovations, and foster collaboration, driving the entertainment industry forward across the Middle East and Africa.

Key Contact: **Kim Pillay, Marketing Executive**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/Outdoor Facility, Trampoline Park, Bowling Centre, Other, Visitor Attraction, Aquarium**

Type of Product/Services: **Trade Exhibition**

Tel : (+966) 114978361
Email : kimpillay@dmgevents.com
Website : www.saudientertainmentexpo.com

SEGA AMUSEMENTS INTERNATIONAL LTD

42 Barwell Business Park, Chessington, Surrey, KT9 2NY, United Kingdom

SEGA Amusements International is a global leader in arcade game production, development, and distribution. Committed to excellence, we serve diverse markets, including Family Entertainment Centres, Arcades, Bowling venues, Bars, Restaurants, Cinemas, and other leisure destinations worldwide.

Key Contact: **Maria Carmen Villarroya, International Sales Manager**

Type of Leisure Operations We Cater To: **Theme Park, Water Park, FEC (Family Entertainment Centre), Visitor Attraction**

Type of Product/Services: **Arcade Games (Video, Redemption, Crane, Sports, Racing, Simulation and Motion Theatre Rides, AR, VR, Coin-Operated Machines) and Parts & Consumables, Cashless Payment Systems, Game Room Design, Installation and Training, Technical Support & After-Sales Services, Merchandising and POS Integration, Carnival/Midway/Competition/Skill/Novelty Games, Remote & Radio Controlled, Used Equipment, Water, Kiddie Rides**

Tel : (+44) 2083918090
Email : Maria.Villarroya@segaarcade.com
Website : segaarcade.com

MANUFACTURER/SUPPLIER MEMBERS

SEMNOX SOLUTIONS DMCC

Semnox Solutions DMCC, Unit No. 1607 JBC Tower 4, Cluster N, Jumeirah Lake Towers, Dubai, United Arab Emirates

Semnox provides- state-of-the-art RFID-based cashless and ticketing solutions for Family Theme/ Adventure Parks, Water Parks, Family Entertainment Centers (FECs)/ Arcades, Food Courts/ Restaurants, Activity Play Areas, Museums, Zoo & more.
Semnox's- offerings include Parafait FEC Solution, for indoor venues, Tixera Park Solution which focuses on the outdoor entertainment segments.

Key Contact: **Shrinidhi Udupa, Marketing Head**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Cashless Ticketing Solutions, Ecommerce Website, Self Service Kiosks, POS Solutions, RFID Card Readers, RFID Cards And Wristbands, Radian Smart Wristband, RFID Enabled Locker Management System, Digital Waiver Management System, Etc.**

Tel : (+971) 42400997
Email : shrinidhi.udupa@semnox.com
Website : www.semnox.com/

SEVERN LAMB & TRAMS INTERNATIONAL

Tything Road, Alcester, Warwickshire, B49 6ET, United Kingdom

Severn Lamb, global leaders in visitor transport, brings 75+ years of expertise in tailor-made solutions. Our range includes Park Trains, Trams, Road Trains, Ultra-Light Rail, and Custom Projects, serving leisure parks, resorts, and municipalities with unmatched quality and innovation to move your guests efficiently and stylishly.

Key Contact: **Alister Head, Marketing Executive**

Type of Leisure Operations We Cater To: **Theme Park, Visitor Attraction**

Type of Product/Services: **Park Trains, Trams, Road Trains, Ultra-Light Rail, Custom Projects, Engineering**

Tel : (+44) 1789400140
Email : alister.head@severn-lamb.com
Website : www.severn-lamb.com

SIMTEC SYSTEMS GMBH

Hermann-Blenk-Str. 52, Braunschweig, Lower Saxony, 38108, Germany

Simtec - German innovation in motion! For over 30 years Simtec is developing and manufacturing customized entertainment motion simulation systems, as one of the leading suppliers of complex ride systems such as flying theaters, open and closed

Key Contact: **Alexander Bresinsky, Director Business Development**

Type of Leisure Operations We Cater To: **Indoor Theme Park, FEC (Family Entertainment Centre), Visitor Attraction, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Major Rides, Simulation and Motion Theatre Rides, Simulator, Interactive Dark Ride**

Tel : (+49) 53072039400
Email : a.bresinsky@simtec.de
Website : www.simtec.de

MANUFACTURER/SUPPLIER MEMBERS

SIMWORX

37 Second Avenue, Pensnett Trading Estate Kingswinford, West Midlands, DY6 7UL, United Kingdom

Simworx are recognised as world leaders in the design, development and manufacturing of 3D and 4D dynamic media based attractions, dark rides and effects cinemas for the theme park and entertainment industry.

Key Contact: **Ralf Schipper, Business Development Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Family Entertainment Centre, Visitor Attraction, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Dynamic Motion Simulators, Dark Rides**

Tel : **(+44) 1384295733**
Email : **ralfschipper@simworx.co.uk**
Website : **www.simworx.co.uk**

SINDRAX TECHNOLOGY

6F607 Jinxiu B, 26 Jvye Road Binjiang Dis, Hangzhou, Zhejiang, 310051, China

We are an hi-tech corporation founded in 2011 in Singapore and growing in China. We are dedicated to providing interactive multimedia products for children and teenagers. With cutting edge interactive technologies and innovative concepts, we design and develop digital products which transforms traditional spaces into immersive play & learning areas.

Key Contact: **Shawn Li, Sales Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre), Play Area/Soft Play/ Indoor, Mixed Indoor/Outdoor Facility,Trampoline Park, Bowling Centre, Other, Visitor Attraction, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Interactive Projection Systems like Magic Brush, Magic Ball, Magic Slide, Interactive Floor & Wall Projections, Magic Trampoline, Fantasy Zone, Virtual Beach, Magic Swing, Superpose, Partydrax, Quest Arena Immersive MR Gaming Spaces. Interactive Touchscreen Solutions such as Kids STEM Lab, Interactive Sketchbooks, Indoor Playground Upgrades, Preschool Edutainment, Restaurant/Retail/Children's Museum Installations, Interactive Sports Game Solutions, Sensory Room Systems**

Tel : **(+86) 4008710800**
Email : **sales@sindrax.cn**
Website : **en.sindrax.com**

SPREE INTERACTIVE

Andernacher Str 37, Nuremberg, 90411, Germany

SPREE Interactive delivers turn-key, large-scale multiplayer VR attractions for location-based entertainment. From SPREE Arena's family-friendly games to innovative VR Bumper Cars, we transform spaces into ACTIVE, SOCIAL, FUN experiences. Easy to install and operate, SPREE redefines interactive entertainment.

Key Contact: **Jonathan Nowak Delgado, Global Head CC Amusement Parks & Leisure Industry**

Type of Leisure Operations We Cater To: **Theme Park, Bowling Centre**

Type of Product/Services: **VR Attractions for Location-based Entertainment**

Tel : **(+49) 1758757591**
Email : **jonathan.nowak@jointhespree.com**
Website : **jointhespree.com**

MANUFACTURER/SUPPLIER MEMBERS

SUB SEA SYSTEMS, INC.

6524 Commerce Way, Diamond Springs, CA, 95619, United States

Sub Sea Systems is the World's leader in underwater entertainment. Its products include SeaTREK® helmet diving, Aquaticar® underwater adventure ride, Solarcat solar-electric catamarans, DIVR+ VR snorkeling, DIVE BELL XR ride, and Kaimana underwater gaming arena. Its services include staff training and certification, maintenance, and conceptual design for non-traditional water parks.

Key Contact: **Hannah de Bie, VP Marketing & Communication**

Type of Leisure Operations We Cater To: **Water Park, Visitor Attraction, Aquarium**

Type of Product/Services: **Seatrek Helmet-Diving Systems, Aquaticar Underwater Ride Vehicles, Solarcat Solar-Electric Catamarans, DIVR + VR Snorkeling Experiences, Kaimana Underwater Gaming Arenas, Dive Bell XR Transport Rides, Licensing and Turnkey Attraction Programs, Global Installation, Licensing Support, Customization Services, Safety Training, Operations Consultation for Waterparks, Cruise Ships, Aquariums, Resorts and Marine-based Attractions**

Tel : **(+1) 5306260100**

Email : **hannah@subseasystems.com**

Website : **subseasystems.com**

TAA GROUP - MIDDLE EAST

18th Street, 12 Warehouses, Shed No.4, Al Quoz Ind Area 1, Dubai, United Arab Emirates

TAA Group turns dreams into reality with turnkey solutions. From stunning artwork and 3D environments to immersive structures, we deliver tailored creations for global clients like Disney, LEGOLAND, and Tomorrowland. Our passionate team ensures every detail inspires awe, shaping emotions and crafting unforgettable experiences for visitors of all ages.

Key Contact: **Mihai Polexa, Managing Director Middle East**

Type of Leisure Operations We Cater To: **Theme Park, FEC (Family Entertainment Centre), Resorts, Museums**

Type of Product/Services: **Themed Entertainment Design and Fabrication, Animatronics and Scenic Elements, Master Planning and Engineering, Project Management and Installation, Turnkey Solutions for Parks, FECs, Museums, and Resorts.**

Tel : **(+971) 42716003**

Email : **mihai.p@taa-group.com**

Website : **https://taa-group.com**

TEDDY MOUNTAIN GENERAL TRADING LLC

Office No. 43-44, Dubai Municipality - Bur Dubai - Al Fahidi, Dubai, United Arab Emirates

Teddy Mountain General Trading is a leading supplier of customisable make-a-bear kits, outfits and accessories. Specialising in creating unique experiences for businesses and events, we provide high-quality products and innovative solutions, empowering clients to launch their own bear-making ventures. Now proudly serving the UAE market with expertise and passion.

Key Contact: **Ryan Davies, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attractions, Aquarium, Culture Centre, Museum.**

Type of Product/Services: **Make-A-Bear Products**

Tel : **(+44) 7720149986**

Email : **ryan@teddymountain.ae**

Website : **www.teddymountain.ae**

MANUFACTURER/SUPPLIER MEMBERS

THINKING ADRENALINE

Office 52126-011, IFZA Business Park, DDP, Dubai Silicon Oasis, Dubai, United Arab Emirates

Thinking Adrenaline is a global consultancy specializing in surf and adventure park development and business strategy. Founded by industry veterans Craig Stoddart and Damon Tudor, they offer a broad array of services including feasibility, development strategy, project management, and operational setup, guiding projects from concept to completion.

Key Contact: **Damon Tudor, Director**

Type of Leisure Operations We Cater To: **Outdoor Theme Park, Water Park, Other**

Type of Product/Services: **Business Strategy & Advisory, Capital Consulting, Operational Efficiency Solutions, Market Entry Strategy. Surf Park-Specific Consulting (Site Development, Commercial Readiness, Operational Planning), Strategic Planning, Market Positioning, Fundraising Strategy and Executive Coaching.**

Tel : **(+971) 551690066**
Email : **damon@thinkingadrenaline.com**
Website : **www.thinkingadrenaline.com**

TRAKS SAFETY TRAINING LLC

PO BOX 74206, Unit #10, Alserkal Properties, Dubai Investment Park 1, Dubai, 74206, United Arab Emirates

TRAKS PRO is one of the leading training providers for IRATA (Rope Access), IPSQA (Rope and Technical Rescue) and OSHA (Working at height) for the GCC

Key Contact: **Johnny Salvador, Sales Director**

Type of Leisure Operations We Cater To: **Theme Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **EHS Compliance Software, Safety Equipment and Tracking Systems, Work-At-Height Training, Inspections and Pressure Testing, Facility and Aquatic Safety Audits, Installation and Support Services.**

Tel : **(+971) 48859980**
Email : **johnny@traksme.com**
Website : **www.traks-me.com**

TRIOTECH

6995 Jeanne-Mance, Montreal, Quebec, H3N 1W5, Canada

Triotech creates award-winning immersive and interactive media-based attractions for the entertainment and edutainment market. With thousands of installations worldwide, over 1 billion guests have enjoyed a Triotech experience in 25 years. Triotech is privately held with 200+ employees across Canada, Europe, the USA, and Asia.

Key Contact: **Yannick Gemme, VP Sales & Marketing**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attractions, Aquarium, Culture Centre, Museum.**

Type of Product/Services: **Interactive and 4D Theaters, Dark Rides, VR attractions, Flying Theaters, Walkthroughs, Dark Coasters, Edutainment Experiences, and a multitude of Coin-op Games.**

Tel : **(+1) 5143548999**
Email : **y.gemme@trio-tech.com**
Website : **www.trio-tech.com**

MANUFACTURER/SUPPLIER MEMBERS

TUV NORD

Stationsstraat 3 Susteren, 5692DL, Netherlands

TÜV NORD, a global leader in Amusement Ride Safety Inspection, offers services including design review, factory and site acceptance tests, product certification, and consultancy. Accredited by SASO and EIAC, we ensure compliance with ASTM and EN-Standards worldwide.

Key Contact: **Ralph Pesgens, Global Head CC Amusement Parks & Leisure Industry**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Certification and Inspection of Amusement Rides, Water Parks, Swimming Pools, Playgrounds, Sports and Fitness Facilities, Structural and Component Safety Reviews, Design Appraisals, Initial and Periodic Inspections, Non-Destructive Testing, Compliance Auditing, Technical Consultancy, HSE Training, Product Certification, System Accreditation for Attraction Manufacturers and Operators**

Tel : **(+31) 622054369**
Email : **rpesgens@tuev-nord.de**
Website : **www.tuv-nord.com**

TUV SUD MIDDLE EAST

A01-A06,Tower A, Empire Heights Building, Abraj Street, Business Bay, Dubai United Arab Emirates

For over 90 years, TÜV SÜD has set global standards in amusement ride and park safety. Renowned for expertise in engineering and certification, our multidisciplinary team ensures safety and quality across services like design reviews, inspections, incident analysis, and sustainability certifications, fostering reliability through tradition and innovation.

Key Contact: **Alex Schrott, Head of Rides Inspection**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Type of Product/Services: **Amusement Ride and Waterpark Certification, Testing, Periodic Inspections, and Safety Approvals, Design Reviews, Structural-Mechanical-Electrical Safety Assessments. Non-Destructive Testing (NDT), Compliance Auditing, Technical Consultancy, HSE Training, Product and Systems Certification for Attractions, Playgrounds, Pools, and Leisure Infrastructure.**

Tel : **(+971) 524888895**
Email : **alex.schrott@tuvsudme.com**
Website : **www.tuv-sud.ae**

UNIQUE URBAN SOLUTIONS L.L.C - FZ

Business Center 1, M Floor, The Meydan Hotel, Nad Al Sheba, Dubai, United Arab Emirates

UNIQUE Urban Solutions (UUS) specializes in innovative water features, multimedia shows, and cooling systems for urban, retail, and landscape projects. With over 35 years of experience and 500+ projects, including in KSA, Bangkok, and Macau, UUS creates captivating experiences. Their motto, "RETHINK What You Know," drives boundary-pushing designs.

Key Contact: **Carlos Edouardo Pissarra, Founder & CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre)**

Type of Product/Services: **Distinctive Water Features (Designing, Engineering, Supplying, Installing, and Maintaining), Urban Art & Decoration, Light Art & Lighting, Urban Furniture.**

Tel : **(+971) 564406593**
Email : **carlos@u-u-s.com**
Website : **http://www.u-u-s.com**

MANUFACTURER/SUPPLIER MEMBERS

VEKOMA RIDES MANUFACTURING B.V

Schaapweg 18 Vlodrop, Limburg, 6063 BA, Netherlands

Vekoma Rides is one of the largest manufacturers in the world of roller coasters & attractions and a market leader in the industry. Vekoma is known for its quality and innovation as reflected in the many installed family & thrill coasters and special attractions.

Key Contact: **Bram Geerlings, Marketing & PR**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Mixed Indoor/Outdoor Facility, Culture Center, Museum**

Type of Product/Services: **Roller Coasters, Dark Rides, Mad House, Beat It Interactive Boat Ride, Media Based Attractions**

Tel : (+31) 611781418
Email : bram.geerlings@vekoma.com
Website : www.vekoma.com

VENU +

Villa 42, Cluster 2, Sustainable City, Dubai, United Arab Emirates

We at VENU+ deal in making guest experiences more fun, convenient, accessible and memorable, all while making our program partners more revenue. From smart storage and mobility solutions, to cutting edge photo services we deliver the most comprehensive, hassle-free turnkey programs to suit every type of venue.

Key Contact: **Jeremy Gray, Commercial Director**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Visitor Attractions, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Go Pod Smart Lockers (Previously Best Lockers), Mobility (previously Scooter Bug), Photo Services (previously NXT Capture)**

Tel : (+971) 585057703
Email : jgray@venuplus.com
Website : venuplus.com

VINTIA

Office 2314, Concord Tower, Dubai Media City, Dubai, United Arab Emirates

Vintia specializes in innovative all-in-one ticketing and booking systems that revolutionize the customer experience in the leisure and attractions sector. Our goal is to simplify your booking and ticketing operations by providing you a streamlined booking & ticketing platform, connected with your online and on premise sales channels.

Key Contact: **Matthijs de Gruijter, Vertical Manager MEA**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Visitor Attractions, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Ticketing and Booking Systems, Admission and Access Control, Payment Solutions, Operations Management, F&B and Retail POS Systems, Self-Service Kiosks and Mobile Ticketing Solutions**

Tel : (+971) 43995770
Email : matthijs.degruijter@vintia.com
Website : www.vintia.com

MANUFACTURER/SUPPLIER MEMBERS

VIP COATINGS

Rudolf-Diesel-Straße 11, Aichach, DE, Bavaria, 86551, Germany

VIP Coatings leads in polyurea and polyaspartic technologies for waterproofing, roofing, and industrial flooring. Offering sustainable, turnkey solutions, we focus on innovation and quality. Guided by openness, creativity, and international expertise, our structured and self-critical approach ensures high-performance coating systems for asset owners worldwide.

Key Contact: **Ehab Qiblawi, Technical Sales and Specifications Manager**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor**

Type of Product/Services: **High-Performance Polyurea and Polyaspartic Coating Systems, Leisureline, Liquishield, VIPshield, Cleancoat, Quickdeck, Quickfloor, Quickroll, Quickprep, OEM Lining Systems, BeSafe Turnkey Solutions**

Tel : (+49) 8251904750
Email : eq@vip-coatings.com
Website : www.vip-coatings.com

VISION XS

Al Ghadeer, 13252 King Abdulaziz Road, Riyadh, Saudi Arabia

We specialize in visitor experience strategy for leisure and entertainment, helping organizations and governments craft exceptional, data-driven experiences that captivate visitors and deliver measurable results. One of our key strengths is having the largest psychographic database in the world for the attractions and entertainment sector.

Key Contact: **Abdallah Blihah, Director of Projects - MENA**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attractions, Aquarium, Culture Centre, Museum, Other**

Type of Product/Services: **Visitor Experience Strategy, Visitor Journey Mapping, Attendance Predictions, Business Modeling, Commercial Strategy, Operation Strategy, Financial Modeling, Training**

Tel : (+44) 7798650161
Email : abdallah@visionxs.co.uk
Website : www.visionxs.co.uk

VIVATICKET

The Onyx Tower 2 - Office 805, Dubai, United Arab Emirates.

Vivaticket is the industry specialist in providing integrated ticketing solutions for the visitor of theme parks, exhibitions, stadiums, live events, indoor venues and museums. The Vivaticket solution allows for the complete management of the venue: parking, admissions, restaurants, shops, services, internal events, rentals, resources, cashless wallet, staff, accreditation, and more.

Key Contact: **Qossai Alqawasmi, Head of Sales**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attractions, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Ticketing Systems, Access Control Solutions, Queue Management, Dynamic Pricing, Cashless Payment Solutions, Mobile Ticketing, Barcode/RFID/NFC Validation, Season Pass Management, Membership Programs, Onsite Ticketing, Print-At-Home Tickets, Reserved Seating, Promotions & Discounts, CRM Integration, Multi-Channel Sales Platforms, Reporting & Analytics**

Tel : (+971) 43399998
Email : sales.me@vivaticket.com
Website : vivaticket.com

MANUFACTURER/SUPPLIER MEMBERS

WALLTOPIA

111v Tsarigradsko Shose Sofia, Sofia-Grad, 1784, Bulgaria

The leading company in design and build of Active Entertainment products, suitable both for indoor and outdoor locations.

Key Contact: **Borislav Atanasov, Deputy CEO Rollglider**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Visitor Attractions, Aquarium, Culture Centre, Museum**

Type of Product/Services: **Climbing Walls, Funwalls, Ropes Courses, Rollglider, Aerial Zip Coaster, Caving Systems, Trampolines, Soft Play, Playgrounds, Zip Lines, Tree Course, Adventure Trails, Cloud Climb**

Tel : **(+359) 885088667**
Email : **borislav.atanasov@walltopia.com**
Website : **www.walltopia.com**

WAREHOUSE OF GAMES LTD

Street N302, Plot MO 0548, Jebel Ali Free Zone North, Dubai, 61361, United Arab Emirates

Warehouse of Games is one of the top suppliers of amusement equipment, arcade games, and family entertainment centers in the Middle East. We offer everything you need under one roof, from the most efficient and comprehensive execution and after-sales support to the most exciting and innovative games.

Key Contact: **Nabil Kassim, GM**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, FEC (Family Entertainment Centre), Bowling Centre**

Type of Product/Services: **Arcade & Video, Carnival/Midway/Competition/Skill/Novelty Games, Redemption Prizes, Remote & Radio Controlled, Laser/Special Effects, Simulation, Virtual Reality**

Tel : **(+971) 505538724**
Email : **nabil@wogme.com**
Website : **wogme.tumblr.com**

WTI

100 Park Avenue, Beaver Dam, WI, 53916, United States

WTI is the world's leading aquatic design specialist; with a primary focus on water-based play, leisure, and entertainment. Our multidisciplinary team – architects, landscape architects, engineers, and designers – leverages its talents to develop original "water-centric" projects from concept to reality.

Key Contact: **Roger Currie, Director of Project Development**

Type of Leisure Operations We Cater To: **Water Park**

Type of Product/Services: **Aquatic Design and Engineering, Swimming Pool Design and Engineering, Waterparks, Waterpark Design and Engineering**

Tel : **(+1) 9208877375**
Email : **rcurrie@wtiworld.com**
Website : **wtiworld.com**

MANUFACTURER/SUPPLIER MEMBERS

WAVESURFER

Stationsstraat 48b Merkem, West-Vlaanderen, 8650, Belgium

We create the best WAVESURFERS worldwide since more than 15 years with more than 68 references on 4 continents. We are your exclusive partner of our unique mobile pop up concepts for all your events with staffing, ref Box Park Doha Qatar. contact us today: info@wavesurfer.eu

Key Contact: **Karel Dubois, CEO**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park, FEC (Family Entertainment Centre), Play Area/Soft Play/Indoor, Mixed Indoor/ Outdoor Facility, Trampoline Park, Bowling Centre, Other**

Type of Product/Services: **Customizable Surf Rides, Wave Simulators, Wave Generators, Boards, Mobile Rental Units, and Full Concept Design with Installation and Support.**

Tel : (+32) 51545904
Email : KDubois@wavesurfer.eu
Website : www.wavesurfer.eu

WHITEWATER

Media One, Office 2504 Dubai, United Arab Emirates

For over 45 years, WhiteWater has been the largest provider of water slides, interactive play structures, water rides and surf simulators. As a market leader with over 5,000 projects, WhiteWater has never forgotten why they're here - to create iconic attractions, drive innovation and deliver unforgettable experiences for guests around the globe.

Key Contact: **Mike Rigby, GM & RVP - Middle East**

Type of Leisure Operations We Cater To: **Indoor Theme Park, Outdoor Theme Park, Water Park**

Type of Product/Services: **Water Slides, Water Rides, Interactive Water Play, Water Rides, Endless Surf, FlowRider, Vantage**

Tel : (+971) 44229318
Email : mike.rigby@whitewaterwest.com
Website : https://www.whitewaterwest.com/en/

WIBIT SPORTS

Am Gut Baarking 15, Bocholt, Germany, 46395, Germany

Founded in 1996, Wibit Sports revolutionized the water leisure industry with modular inflatable water parks. Designed for pools, lakes and open waters, their products combine safety, fun and adaptability to fit global locations. Trusted by businesses in over 100 countries, Wibit Sports delivers innovative, TÜV-certified solutions for engaging recreational experiences.

Key Contact: **Julia Schulz, Marketing Coordinator**

Type of Leisure Operations We Cater To: **Outdoor Theme Park, Water Park, Mixed Indoor/ Outdoor Facility, Other, Visitor Attraction**

Type of Product/Services: **Modular Inflatable Water Parks, SportsParks, PoolTracks, WibitTAG, and Wibit Kids**

Tel : (+49) 2871238200
Email : julia.schulz@wibitsports.com
Website : www.wibitsports.com

MANUFACTURER/SUPPLIER MEMBERS

WORLDWIDE ZOO CONSULTANTS

1306, 13th Floor, Sky Tower, Al Reem Island Abu Dhabi, United Arab Emirates

Worldwide Zoo Consultants is a global leader in the creation, development, and management of a variety of specialised animal attractions and projects, including zoological parks, public aquariums, animal sanctuaries & living museums. WZC was established in 2011 in the UAE solely as a zoological and aquarium operations and management consultancy.

Key Contact: **Tommy Wilken, Chief Executive Officer**

Type of Leisure Operations We Cater To: **Theme Park, Visitor Attractions, Aquarium**

Type of Product/Services: **Zoo & Aquarium Facility Development, including Project Conceptualization, Master Planning, Architectural Design, Construction Supervision, Operations Management, Staff Training, and Animal Welfare Consulting**

Tel : (+971) 25462455
Email : tommy.wilken@worldwidezoo.com
Website : www.worldwidezoo.com

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Advertiser Profiles

ADVENTURELAND



About the Company

Spanning over 90,000 square feet, Adventureland features more than 40 thrilling rides and attractions, along with 170+ interactive games. Guests can enjoy three indoor roller coasters, soar across an indoor zip line or immerse themselves in Bowl N' Roll, a state-of-the-art, dynamic bowling adventure. For those seeking spine-chilling thrills, Spooky – Dungeons of Fear stands out as one of the region's largest and most exhilarating horror attractions, and there's so much more to explore and enjoy.

At the heart of Adventureland's mission is the dedication to create unforgettable moments, strengthening family connections and delivering exceptional guest satisfaction.

Every element of the park is thoughtfully designed to offer high-quality entertainment that blends excitement, innovation and safety.

Adventureland's unwavering commitment to safety ensures a secure, worry-free environment for all. With a focus on continuous innovation, Adventureland consistently sets new standards to remain the UAE's premier destination for fun and adventure.

Whether you're visiting with family, friends or exploring on your own, Adventureland promises a journey filled with joy, excitement and memories to treasure forever.





Vision Statement

Adventureland brings adventure and excitement to life with state-of-the-art attractions like Bowl N' Roll, Spooky – Dungeons of Fear and more. We're determined to create unique experiences that captivate families and thrill-seekers alike. Every visit is crafted to bring joy, excitement and unforgettable experiences to cherish forever.

With every new addition, we aim to raise the bar and remain the region's top destination for fun. Safety is at the heart of everything we do, ensuring a secure and worry-free environment for all our guests.

At Adventureland, we are dedicated to inspiring our guests and ensuring that everyone leaves with stories to tell.

Sami Abi Chahine, General Manager



العثيم للترفيه
Al Othaim Entertainment



About the Company

Al Othaim Entertainment Company, a subsidiary of Al Othaim Investment Company, is a leading force in the entertainment sector across the Middle East, with a strong presence in Saudi Arabia, the UAE, Qatar, Oman, Egypt and Bahrain. Managing over 67 entertainment centres and welcoming more than 6 million visitors annually, the company is committed to delivering world-class experiences that bring joy to all ages.

Its portfolio includes a diverse range of brands such as Saffori Land, Snow City, My Town, Xtreme Zone, Xtreme Bowling, Xtreme Laser, Xtreme VR, Xtreme Karting, Xtreme Inflatable and Xtreme Z. From toddler-friendly attractions to high-adrenaline adventures, all the destinations are thoughtfully designed to create fun for the whole family.

Al Othaim Entertainment Company takes pride in its deep understanding of the evolving entertainment trends and its ability to create inclusive and innovative spaces that encourage connection, excitement and memorable moments. Whether it is thrilling rides, immersive virtual experiences or engaging family activities, its offerings are crafted to cater to diverse tastes and age groups.

Al Othaim Entertainment Company's brand ethos centres on delivering happiness through exceptional entertainment, making it a trusted name in the industry. Al Othaim Entertainment is more than just fun; it is where unforgettable experiences come to life.





Vision Statement

We aspire to be the preferred destination for customers by continuously delivering innovative, inclusive and enriching shopping and entertainment experiences. We aim to inspire and delight our visitors with a unique environment that reflects the vibrant cultural identity of the Kingdom of Saudi Arabia, especially the dynamic spirit of Riyadh, while ensuring safety, diversity and excellence at every touchpoint.

Bandar Albohiry, Chief Executive Officer & Managing Director



AMUSEMENT SERVICES INTERNATIONAL LLC



About the Company

When it comes to family entertainment centres (FECs), indoor amusement facilities, bowling centres, adventure play facilities one of the most established, trusted and go-to companies in the MENA region has been Amusement Services International LLC (ASI).

With over 26 years of proven industry experience in equipping 5,400+ FEC projects in over 35 countries spread across the MENA region, Eastern Europe and the Indian sub-continent, ASI offers end-to-end, concept-to-completion solutions encompassing design, supply, pre-opening, operations and management of amusement, leisure, entertainment and F&B destinations.

As the exclusive distributor and manufacturer's representative for some of the most elite brands in the entertainment industry, ASI offers its customers a range of products to select from, be it amusement rides, attractions or arcade, redemption & novelty games, VR attractions, motion simulators, adventure playscapes, experiential bowling concepts, midway carnival games and edutainment concepts.

Renowned for their exceptional customer service and after-sales support, ASI has received the coveted 'MENALAC Best Supplier of the Year Award' four times in a row. In addition to this accolade, ASI designed and equipped projects have also won 'Best FEC', 'Best New Leisure Concept' and 'Best Adventure Play Concept' at various award forums.





Vision Statement

At ASI, our journey has always been defined by a relentless pursuit of excellence. We are driven by a clear vision to be the most valued partner in the global leisure and entertainment industry. Innovation, progress and being market centric are not one-time goals; they are a continuous process. As we evolve year on year, we remain true to our core mission of delivering excellence daily in everything we do.

Prakash Vivekanand, Managing Director



بـــان
BAAN



About the Company

For over 50 years, BAAN Holding has been the national champion for entertainment and hospitality in the MENA region. Formerly known as AlHokair Group, BAAN has evolved into a leader in family entertainment, offering world-class experiences across the region.

BAAN Entertainment's portfolio includes thrilling arcade games, immersive soft play areas, high-energy laser tag experiences state-of-the-art bowling alleys, ensuring entertainment for all ages. Its family entertainment centres are designed to bring joy, excitement and connection, offering a mix of action-packed, interactive and immersive experiences for children, teens and adults alike.

By integrating cutting-edge technology and globally recognised brands such as Hasbro, Moonbug's CoComelon and Mattel, BAAN Entertainment has been elevating the standards of entertainment, delivering exclusive and engaging experiences. Whether it's a fast-paced laser tag battle, a friendly bowling competition, an adrenaline-filled gaming challenge or an imaginative play adventure, BAAN Entertainment offers something for everyone.

With an unwavering commitment to innovation and excellence, BAAN Entertainment continues to redefine family leisure, making entertainment more exciting, accessible and memorable for millions across the MENA region.





Vision Statement

As Saudi Arabia advances towards its Vision 2030 goals, the entertainment, hospitality and catering sectors have become powerful engines of economic growth and social transformation. At BAAN Group, we take immense pride in leading this evolution, delivering exceptional experiences that align with the aspirations of communities and enhance the quality of life across the region.

With over 50 years of expertise, we at BAAN, formerly known as Alhokair Group, have solidified our position as a pioneer in the entertainment and hospitality sector in the MENA region. we strongly believe that the entertainment sector is not just about leisure – it is a vital contributor to tourism, economic diversification and job creation.

Fahad Al Obailan, Group CEO



BLOCKS



About the Company

Blocks Group is a new-age construction company that creates breathtaking experiences thereby redefining the tourism and entertainment culture in the region. As Saudi Arabia's leading integrated thematic construction company, Blocks Group takes a turnkey approach, transforming creative concepts into tangible, awe-inspiring destinations.

With over 330 projects delivered locally and internationally, Blocks Group specialises in themed environments, attractions and architectural storytelling. Its comprehensive in-house capabilities including steel works, FRP, GRC, LGS and animatronics allow the company to manage the entire process from concept design to execution, ensuring every detail is crafted to perfection.

Blocks Group collaborates with visionary architects, developers and creatives to bring spaces to life that go beyond expectations. Whether it's a world-class theme park, immersive destination or landmark attraction, it builds with precision, passion and purpose.

Backed by a track record of award-winning case studies and impactful work, Blocks Group continues to push the boundaries of what entertainment construction can be. 'Building experiences, shaping entertainment culture' is not just the company's slogan, but the spirit behind every project it delivers.





Vision Statement

At Blocks Group, we take pride in shaping the entertainment culture and contributing to the goals of Saudi Vision 2030. Our journey is driven by a deep commitment to creativity, innovation and collaboration. As we look ahead, we remain focused on expanding our impact across the region — building meaningful experiences, empowering local talent and redefining what's possible in the world of entertainment and construction.

Abdulkareem Al Zaid, Chief Executive Officer



EMBED



About the Company

Embed is a leading technology partner of choice for the amusement, entertainment and leisure industries. Designed to deliver a superior guest experience, the Embed Ecosystem is an integrated cashless solution for business owners to maximise revenue and operational efficiency while reducing costs.

With Embed's platform, a business (single or multi-location) has real-time visibility and control across its entire operation: from guest party-planning and bookings to points-of-sale, including bundles and upsell packages, a full range of games management, real-time prize inventory, game card kiosks and more, all integrated and accessible via mobile.

With over 1,000 customers and more than 3,000 installations around the world, Embed is equipped and ready to empower family entertainment centre (FEC) businesses with direct sales, services and support anytime, anywhere.





Vision Statement

Guests, experiences, staff, operations, bookings, payments, sales, reports – the integration of these tech components is critical for an FEC's success. The Embed Ecosystem is designed to redefine how these integrate so operators can create the ultimate cashless, cloud-based system for a seamless guest experience.

As we pioneer innovation with visionary product development with tech leaders such as Apple, Google and Amazon Web Services, Embed revolutionises cashless payment systems. With the rise of the API, the Embed Ecosystem is the paradigm shift for consumer experience revolution, helping operators create experiences they want with greater customisation. It's exactly how they like it.

Renee Welsh, Chief Executive Officer





About the Company

HM International Holding is a leading Kuwaiti company dedicated to supporting local businesses and enriching community life through engaging family entertainment experiences. Driven by a mission to spread joy, spark creativity and strengthen community connections, the company focuses on delivering memorable moments for families across Kuwait.

The company operates a portfolio of successful Kuwaiti homegrown entertainment brands that have become household names. These include Fun Zone Park, Snow Park and the recently launched Icy Village.

Fun Zone Park, with four locations across Kuwait, is known for its wide variety of attractions such as soft play area, arcade games, VR experiences, carnival games, trampolines and themed birthday rooms, catering to children and families of all ages.

Snow Park offers a unique, indoor winter-themed experience featuring ice skating and snow play, bringing the magic of winter to Kuwait all-year-round.

Icy Village is now one of the largest snow attractions in Kuwait. It features an ice rink, snow town, soft play area, flume ride, VR zone, arcade games and kiddie rides.





Vision Statement

At HM International Holding, we are driven by a deep commitment to innovation, quality and community. Our goal is to create immersive, inclusive and engaging environments where families can come together, connect and create lasting memories. We believe that entertainment should go beyond fun – it should inspire imagination, encourage creativity and strengthen the bonds between families and communities. With this in mind, we are continually developing new concepts and experiences that reflect the diverse and evolving needs of the families we serve.

Our growth strategy focuses on expanding our reach through thoughtful, strategic locations while maintaining the highest standards of safety, service and excellence. Through our flagship brands, Fun Zone Park, Icy Village and Snow Park, we aim to redefine family entertainment by delivering unique attractions that are accessible, exciting and unforgettable. We envision a future where our parks are not only recognised names but also trusted spaces that bring joy and value to families throughout the region. At HM International, we are building more than entertainment destinations – we are creating shared experiences that bring people together.

Hussain Marafi, Chief Executive Officer



ideaCrate

Edutainment Company LLC



About the Company

IdeaCrate Edutainment Company is built around the vision that play is not just a pastime – it's a powerful tool for learning and growth. The company's philosophy, centred on the principle of 'Play, Discover and Create' shapes every aspect of its space, ensuring that children engage in purposeful, enriching and fun experiences that ignite creativity, build confidence and foster problem-solving skills.

Take the example of one of its brands Orange Wheels, which is designed as a safe and stimulating environment, encouraging children to explore, interact and challenge their thinking. Orange Wheels' weekday daily programmes take this a step further, incorporating five types of play that support cognitive development, social engagement and creative expression.

From sensory exploration for younger children to more advanced challenges that develop critical thinking, these programmes ensure every visit is dynamic, engaging and meaningful.

Orange Wheels' successful membership programme enables families to return regularly, participating in ever-evolving activities that ensure children are always discovering something new. By combining structure and free play, Orange Wheels creates an experience that goes beyond entertainment – it's a space where children grow, learn and thrive.

As Orange Wheels expands, IdeaCrate is seeking strategic partnerships with mall developers and investors to transform commercial spaces into vibrant, family-centric destinations, making 'play' a central part of every community.



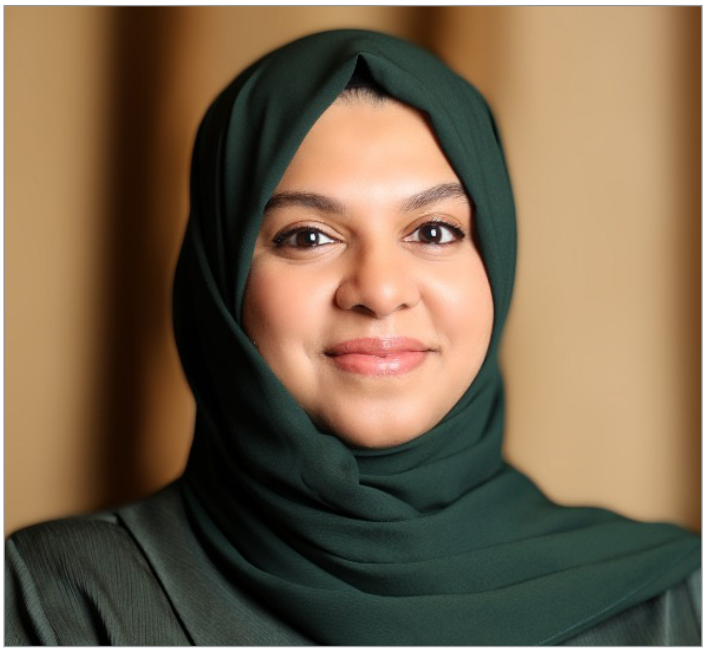


Vision Statement

At IdeaCrate, we believe that family engagement is the key to the future of retail and community spaces. By expanding Orange Wheels into new markets, we aim to create vibrant, high-value family experiences that transform malls into must-visit destinations.

Every child deserves a space to learn, play and grow – our mission is to bring that vision to families across the MENA region. Through structured play programmes, enriching activities and strategic partnerships, we are committed to redefining how commercial spaces serve families, ensuring that every visit is an opportunity for children to play, discover and create.

Shifa Yusuffali, Chief Executive Officer





About the Company

Dubai's premier indoor theme park, IMG Worlds of Adventure elevates family entertainment to new heights. Nestled in the heart of Dubai, it is spread across 1.5 million square feet, offering a thrilling mix of adventure and excitement across six epic worlds. These include Marvel and Cartoon Network zones; IMG Worlds' original concept the Lost Valley-Dinosaur Adventure joined by IMG Boulevard; IMG Kids Zone; and The Haunted Town with the Haunted Hotel. The park is fully indoors and comprises six zones including 25 original retail concept stores and 36 immersive F&B outlets.

At its core, IMG Worlds of Adventure is dedicated to innovation and excellence, ensuring a memorable experience for every visitor.

Unique to the park are its mascots Freddy and Flory. Alongside adrenaline-pumping rides, guests can enjoy themed dining across international cuisines, shop exclusive merchandise and meet their favourite characters.

IMG Worlds prioritises eco-friendly practices and inclusivity for all visitors. Its commitment to excellence extends beyond entertainment, making it a year-round destination that sets industry benchmarks in storytelling, technology and guest engagement.





Vision Statement

At IMG Worlds, our Board of Directors envision a future where our theme park is not just a market leader but a pioneer in redefining family entertainment. Embedding innovation, excellence and storytelling at the heart of everything we do, we are committed to transcending the immersive theme park experience. Our commitment to incorporating groundbreaking technology and thematic advancements reflects our ambition to continuously provide awe-inspiring and memorable experiences that cater to families and thrill-seekers worldwide. We are dedicated to expanding our horizons, setting new benchmarks in the theme park industry, ensuring that IMG Worlds remains synonymous with unparalleled excitement and creativity.

Yawer Pasha, Group Chief Financial Officer



LANDMARK LEISURE



About the Company

Landmark Leisure has been the pioneer of creating innovative indoor entertainment experiences for families since 1999, across the UAE and the GCC. With a commitment to providing quality family time through active play, Landmark Leisure continues to evolve, bringing joy and ongoing innovation to every customer experience.

Blending tradition with modernity, Landmark Leisure's refreshed identity features a vibrant colour scheme designed to captivate both young children and teens. Dynamic visuals further elevate the experience, turning each visit into a captivating adventure.

The redesigned spaces now feature state-of-the-art play areas, immersive VR adventures and exciting new attractions that promote physical, cognitive and social development while providing endless entertainment. The impact of its core brands' evolution is already evident in new locations across the UAE and Qatar.

In their continued drive to stay relevant, offering a diverse choice of attractions to an ever more sophisticated and demanding customer, Landmark Leisure has recently introduced its newest roller rink concept called Floored. Further, its upcoming entertainment concept Level@ will seamlessly combine dining, gaming and social experiences, setting the stage for the next chapter in family entertainment.





Vision Statement

We recently celebrated our 25th year of providing indoor leisure and entertainment solutions to our loyal customer bases in the GCC and India. Being part of the Landmark Group and truly reflective of our late Founder, Micky Jagtiani's values of constantly adapting and evolving, Landmark Leisure is providing diverse, sustainable and creative solutions across seven different brands, catering to products for young and old, for the adventure seeker to the family fun lover all the way to the young child learning their first play experiences. Our overarching guiding principle of "Creating Everlasting Smiles" has been our constant barometer and measuring stick to which every single team member of Landmark Leisure is trying to live up to every single day.

Silvio Liedtke, Chief Executive Officer



METAAGROW

be smart...



About the Company

METAAGROW is the world's first operations and maintenance software specifically designed for bowling and family entertainment centres. Built to simplify complex tasks, it helps operators eliminate downtime, automate routine maintenance and streamline daily operations, all through an intuitive, user-friendly platform.

METAAGROW offers a suite of powerful features that minimise downtime by monitoring equipment health and triggering automated maintenance. Operators can utilise QR code-based tools to simplify issue reporting, asset tracking and collect real-time customer feedback.

With instant alerts for maintenance, inventory and operational updates, businesses can respond to issues swiftly. The platform also supports multi-location management through a single dashboard, unlimited users and cloud storage, making it scalable without extra costs. Its plug-and-play setup eliminates the need for expensive hardware.

METAAGROW brings measurable value by enabling preventive maintenance schedules to reduce equipment failure risks. Its issue and ticket management system includes a 5-Level Escalation System, ensuring faster and more efficient resolutions. Spare parts and inventory tracking come with automated reorder alerts to prevent shortages. Moreover, QR-based customer feedback allows guests to instantly rate their experience, helping centres maintain high service standards.





Vision Statement

At METAAGROW, we envision a world where managing operations and maintenance is effortless and intuitive. Our vision is to be the most trusted and user-friendly application globally, helping operators to save time by digitalising their daily operations, minimise downtime of all their games and attractions and enhance their guest experience.

Rohan Mathur, Director



MISONIKA



About the Company

Headquartered in the UAE, Misonika is a modern integrated marketing agency built to serve the fast-paced needs of today's digital and experiential landscape. Misonika specialises in delivering impactful strategies that bridge creativity and performance for businesses across industries. It offers a full spectrum of services that include digital marketing, social media management, public relations, event planning & production, podcast production and content creation.

Misonika approaches digital marketing with a strategic, data-led mindset to drive visibility, engagement and conversion across B2B and B2C markets. Its social media services offer end-to-end platform management, covering content & community management, audience engagement and analytics. In the PR space, Misonika supports brands to build and strengthen reputation through targeted media outreach, influencer collaborations, strategic communication and more.

From corporate launches to intimate activations, the Misonika team curates events and experiences tailored to specific client goals. Additionally, its content creation services deliver compelling narratives through video, photography, design and copywriting aligned with brand identity and marketing objectives.

Further, Misonika is also the creator of Business of Entertainment, the MENA region's only dedicated media platform for the leisure & entertainment industry.

Misonika is proud to have compiled and designed both the first and second editions of the MENA Leisure Report — a comprehensive industry publication that highlights key trends, insights, and developments shaping the Leisure, Entertainment, and Amusement sector across the MENA region. Include the cover page of both of the MLR.





Vision Statement

My vision is to create a marketing ecosystem where creativity meets strategy to deliver meaningful results. I believe in storytelling that resonates, communication that connects and campaigns that convert.

Through Misonika, I strive to empower brands with purpose-driven marketing solutions and become a trusted partner in their growth journey. Our mission is to stay ahead of the curve, constantly evolving to meet the ever-changing dynamics of the digital and entertainment landscape in the MENA region and beyond.

Upasna Barua, Founder & Chief Executive Officer





About the Company

PLAY is Kuwait's leading chain of indoor playgrounds and family entertainment centres dedicated to providing clean, safe and high-quality play areas for children. Established in 2009, PLAY was founded with the vision of creating exceptional and fun-filled spaces for children. Initially focused on state-of-the-art soft play areas for toddlers and young children, PLAY quickly gained the trust of families, leading to the expansion of four additional locations.

Today, PLAY offers a diverse mix of entertainment, including thrilling big rides, trampoline, redemption and arcade games and much more. Each selection is based on the latest market trends and adheres to PLAY's strict non-violence policy, ensuring a fun and family-friendly experience. Its entertainment centres can be found at Assima Mall, Promenade Mall, Boulevard Mall and Jahra Mall.

Beyond playtime, PLAY also offers customised packages for birthday parties, school outings and special occasions, creating opportunities for children to bond and make unforgettable memories with their friends. To further enrich the experience, PLAY also offers a variety of creative workshops, including slime-making, gypsum coloring and canvas painting. These activities are designed to spark creativity in children and provide them with hands-on, engaging experiences, ensuring there's always something new and exciting to explore at PLAY.





Vision Statement

My vision has always been to create unique and engaging environments where children can play, learn and develop essential social and motor skills, all the while ensuring the highest standards of quality, safety and cleanliness. I take great pride in seeing PLAY recognised as Kuwait's leading provider of family entertainment, and we remain committed to our mission of being the number one choice for children and parents alike.

Sheikha Monira Al Sabah, Chief Executive Officer



porviva
innovative surfaces



About the Company

Established in 2001, Porviva has emerged as a prominent manufacturer of innovative surface solutions. The company specialises in floor coatings and waterproofing for various sectors, including water and theme parks, buildings, transportation infrastructure and industrial applications. In recent years, Porviva has consistently broadened its range of anti-slip and cooling solutions for water parks, garnering references from around the globe. Porviva surfaces can be found in locations including Wild Wadi and LEGOLAND (Dubai), YAS Waterworld (Abu Dhabi) and Meryal Waterpark (Doha).

The blend of its primer and topcoat, along with the innovative porbits – a colourful mixture of various minerals, natural stones and mica – not only offers an appealing aesthetic for theming but also provides several distinct advantages. In warm conditions, it provides a cooling and anti-slip effect, allowing visitors to walk barefoot on surfaces treated with this material. Additionally, it is easy to clean and repair, UV-resistant and comes in a wide array of colour combinations.

Porviva products are utilised in pools, walkways and landscaping areas too, as the company is continually expanding its product line. It has recently introduced stamped concrete solutions to its offerings, creating a coating that greatly simplifies the maintenance of waterslides.





Vision Statement

Our cutting-edge surface solutions are not only cost-effective and durable, but they also enhance safety, especially in water parks and wet areas. Many providers face the challenge of slippery floors, which prompted us to find a solution. As we developed our idea, we discovered that our materials have much greater potential. We are now proud to see Porviva surfaces being utilised in various settings, including the creation of stunning landscapes. Sustainability is at the heart of our development process. We place a high priority on protecting our environment and conserving resources such as raw materials, drinking water and energy.

Gerd Pleyers, CEO





About the Company

Sacoa Cashless System is the leading, worldwide supplier of revenue management systems for the amusement, entertainment and leisure industries with more than 2,400 installations in 70+ countries. It offers customised applications to manage and control all aspects of an entertainment facility by using rechargeable cards (PlayCards), wristbands and even smartphones with centralised management from a remote corporate system.

One of its newest technologies is Redemption 2, an intelligently designed interface for redemption transactions, allowing for each attendant to serve multiple customers simultaneously, thereby maximising staff efficiency, speeding up operations and increasing profits.

Another innovation is the Redemption Kiosk, letting customers self-redeem their e-tickets without having to wait in queue.

The company has also launched KwikPay, a payment solution especially designed for operators with small or route-based operations.

Sacoa's new K5 Kiosk enables users to purchase, recharge and analyse their play cards conveniently in one location, simplifying customer decisions with preselected promotional packages.

Time Tracker is among its latest products that communicates with electronic wristbands to set a timer within them, which is great for time-based attractions, such as trampoline parks, laser tag, soft playgrounds and more.





Vision Statement

Our system offers operation flexibility and top-notch quality support. Other card systems just follow our steps because almost every feature that is now considered standard requirement for any debit card system was originally invented and developed by us.

We were first to develop and use read-only cards instead of cash or tokens, VIP status, Timecards, e-ticket and implementation of a self-serve kiosks. Today, with more than 2400+ debit card systems installed worldwide, Sacoa is recognised as the global leader in Cashless Management Systems for the amusement, entertainment and leisure industries.

Pol Mochkovsky, Chief Executive Officer



Seef entertainment



About the Company

Launched in 1998, Seef Entertainment is Bahrain's leading entertainment company, committed to transforming the leisure landscape with state-of-the-art attractions and globally trending concepts. With a footprint spanning 14,000 square metres (sqm), it offers four dynamic entertainment brands: Yabeela, Magic Island, Jumpoline and Hawa. Each brand is designed to create unique experiences for visitors of all ages.

At Yabeela, Bahrain's largest indoor family entertainment centre, guests are immersed in a visually stunning and highly engaging world. Magic Island, a long-standing favourite, transports visitors to an island-themed adventure with over 120 games and more than 20 attractions across two locations.

Jumpoline provides an energetic trampoline experience for families, while Hawa, Bahrain's first and largest indoor inflatable park, delivers boundless fun in a 1,400 sqm soft-play arena.

With a commitment to safety, customer service and innovation, Seef Entertainment stands apart as Bahrain's premier destination for family-friendly entertainment. Certified by TÜV for safety and powered by a professionally trained team, it ensures a seamless, high-quality experience for all.





Vision Statement

Seef Entertainment is driven by a vision to redefine family entertainment in Bahrain. Through continuous innovation and enhancement of our offerings, we aim to introduce cutting-edge attractions that cater to diverse audiences while maintaining the highest standards of safety and service. We remain committed to delivering experiences that are immersive, engaging and aligned with global trends, solidifying our position as a leading destination for entertainment in the Kingdom of Bahrain.

Ahmed Yusuf, Chief Executive Officer





About the Company

Born in 2015 in Kuwait, TRAMPO Extreme is now a well-recognised GCC brand. With a friendly, engaging, safe and family-oriented approach, TRAMPO Extreme attracts children and adults to engage in fun activities, while improving their physical fitness and cognitive abilities in a safe environment. When a visitor steps inside TRAMPO Extreme, they are transported to a world of extreme excitement and limitless fun.

TRAMPO Extreme provides an exceptional environment for active indoor entertainment that brings the latest innovative and challenging family activities.

Its family-friendly parks are inclusive, encouraging spaces to celebrate life's most memorable moments. TRAMPO Extreme is an immersive experience for the entire family with presence in Kuwait, Oman, the UAE, Qatar and soon in Bahrain and beyond.

Whether a guest wants to Jump, Climb or Play, there is something for everyone at TRAMPO Extreme. It's a whole new level of active play attractions, perfect for challenging the entire family, while creating lasting memories.





Vision Statement

At TRAMPO Extreme, we believe in the power of movement, laughter and shared experiences. Our vision is to create exciting, safe and innovative spaces where children of all ages and families can connect, stay active and make unforgettable memories. As we grow, we stay true to our commitment to quality, creativity, customer satisfaction and happiness. We are always looking ahead, embracing new ideas, expanding our reach and redefining active entertainment. The future is full of possibilities, and at TRAMPO, we are jumping higher every day to bring more fun, energy and excitement to communities around the GCC area.

Ghassan Assi, Chief Operation Officer



Triotech



About the Company

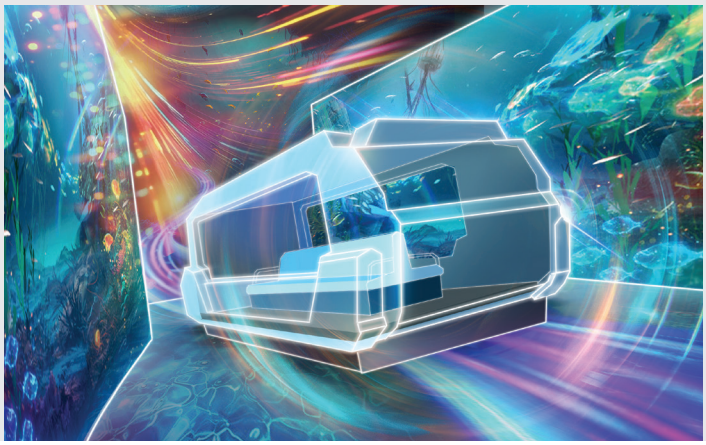
Triotech is the creator of award-winning immersive and interactive media-based attractions for the entertainment and edutainment markets. With thousands of attractions and games deployed in 65 countries, more than 985 million guests have lived a Triotech experience over the last 25 years.

Specialising in Dark Rides, Interactive and 4D Theatres, Walkthroughs, Dark Coasters, VR attractions, Flying Theatres and edutainment experiences, Triotech delivers integrated turnkey solutions, including content developed in its animation studio. The company's vertically integrated approach ensures innovation at every stage, from design and technology development to production and deployment.

In 2025, Triotech is bringing some of its most ambitious projects to life in the Middle East, reinforcing its presence in this fast-growing market. This includes 'Into the Deep' at Six Flags Qiddiya City, Triotech's largest-ever interactive dark ride, featuring real-time gameplay and immersive storytelling. Additionally, 'Transformers' for Saudi Entertainment Ventures (SEVEN) is set to deliver a high-energy, media-based dark ride experience. Triotech is also working on a new series of multiple dark rides for SEVEN Discovery Centers, designed to bring immersive storytelling to a new generation of visitors in Saudi Arabia.

With a proven track record of innovation, Triotech continues to shape the future of interactive entertainment worldwide.





Vision Statement

The future of attractions is evolving rapidly, and Triotech is at the forefront of this transformation. As we enter our 25th year, our focus remains on delivering cutting-edge interactive experiences that captivate guests and drive business success for operators. We are pushing the limits of immersion and engagement through storytelling, technology and innovative ride design. Our R&D and entertainment centre in Montreal will allow us to test and refine concepts faster than ever. The next 25 years will be about evolving entertainment, offering attractions that are dynamic, social and unforgettable.

Triotech
25
YEARS
OF FUN

UHY

Connect to possibility



About the Company

UHY James, an audit, advisory, tax and risk consulting firm has been present in the UAE for three decades and is powered by 14 Partners & Directors, 25+ Managers & 170 + professionals who cater to the financial needs of almost 1,500 business organisations across the Emirates.

Expert industry insights, a pragmatic solution-oriented approach, solid credibility in the market and a future forward perspective make UHY James a preferred "Partner of Choice" for businesses across sectors and industries. Backed by the global network – UHY International – UHY James offers clients a winning combination of local expertise and global exposure.

Growing from strength-to-strength in its top-notch service delivery, the firm has successfully ensconced its position among businesses of all sizes and diverse sectors in the UAE landscape. Its team of financial experts, backed by decades of significant industry experience, handhold businesses to navigate roadblocks, realign their strategies with a streamlined focus on customer profitability.





Vision Statement

As the UAE continues to uninhibitedly expand its economic horizon, as an audit/advisory firm we are laser focused on amplifying our capabilities to drive compliance within the business ecosystem without missing a beat in sustaining growth and expansion for the business.

Specifically speaking about the UAE's estimated $20 billion worth playground, industry insights expect the country's leisure and entertainment segment to be poised for unprecedented growth powered by theme parks, family entertainment centres and culture-based attractions. Surge in tourist footfall, adoption of sustainable measures and a diversified entertainment landscape make it imperative for compliance and advisory services to be at the centre of the leisure and entertainment sector's growth story. Assured about the consistency of change, we stand committed to connecting businesses to new possibilities and helping them embrace change, fuelled by the foundation of growth.

James Mathew, Chief Executive Officer & Managing Partner, UHY James Chartered Accountants LLC



VIVATICKET

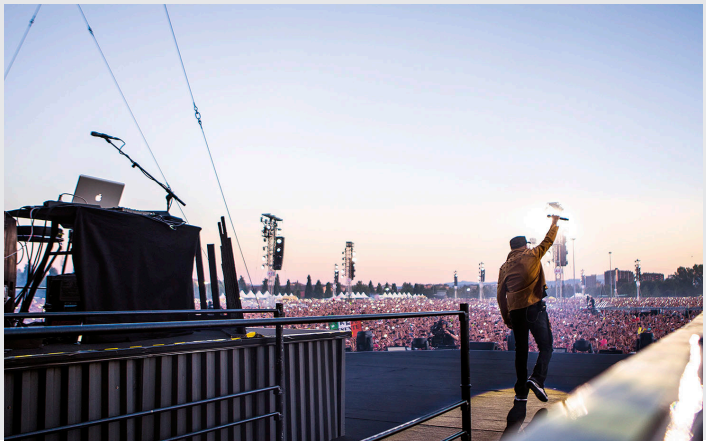


About the Company

Vivaticket, the leading ticketing operator in the GCC, is an industry specialist in providing integrated ticketing, access control, security and marketing solutions for a wide range of events and venues, including theme parks, exhibitions, stadiums, indoor venues, theatres, live events, museums, zoos and aquariums.

User experience plays a central role in the Vivaticket vision, acting as the true backbone of its software development efforts, which, over the years, has led to the evolution of the Vivaticket solution from a pure ticketing and access control system to a complete venue management system. The idea is simple: starting from the need to purchase a ticket, follow the customer throughout their journey, influencing the purchase decision, supporting the travel preparation, then covering the entire on-site experience and concluding with the evaluation of customer satisfaction.

The Vivaticket solution allows complete management of the venue: parking, entrances, restaurants, shops, services, internal events, rentals, resources, cashless wallet, biometric check, dynamic pricing, personnel and accreditation and much more. All this is available in a single system, guaranteeing optimisation of cost and reduction of complexity, thanks to the single database and user-friendly interface, without introducing any limitations to the user experience.





Vision Statement

Vivaticket's future is driven by innovation and a relentless focus on enhancing the guest experience. The company is enhancing its dynamic pricing engine and introducing a dynamic QR code solution for memberships, offering greater flexibility and security. Artificial intelligence (AI) will be integrated across all systems to optimise training, implementation and development. A global partnership with AWS ensures our scalability and reliability. With 13 acquisitions in 16 years, Vivaticket continues expanding, especially in the live entertainment and events market. Trusted by 3,400 customers across 55 countries, Vivaticket remains committed to shaping the future of the global attractions industry through cutting-edge solutions and exceptional service.

Davide Camaiora, Managing Director



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