

Sizzling Summers

Unveiling Leisure and Entertainment Trends in the GCC

An in-depth analysis into the summer plans, attractions visited, and intentions for revisiting among UAE and KSA consumers.

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Methodology

YouGov interviewed 2,005 residents in KSA (1,002) and UAE (1,003) in May 2023.

All respondents completed the survey online and are existing members of YouGov's research panel.

The sample is representative of those living in each country.

[Launch a survey](#)



▶ Homebound Summer

Exploring UAE and KSA residents'
summer plans and activities



Increased preference to stay home this summer in UAE and KSA

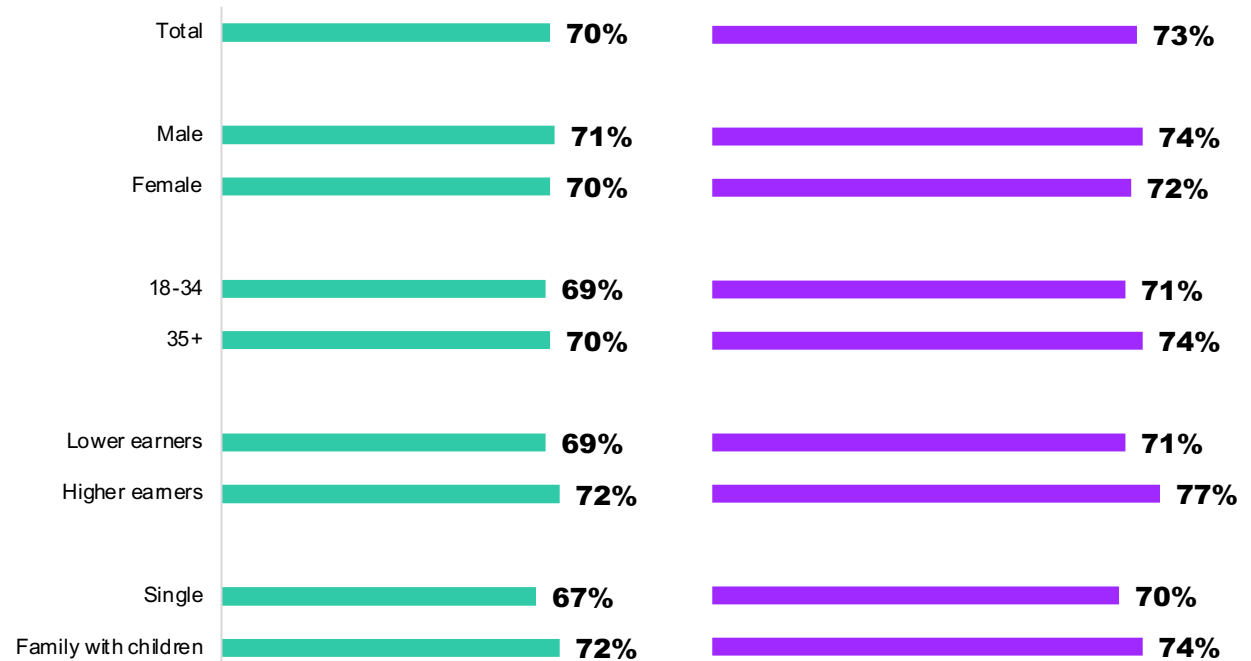
A large majority of residents in UAE (70%) & KSA (73%) intend to spend more time in their country of residence this summer (June to September) compared with last summer.

This preference to stay at home more this summer is consistent across demographics.

■ UAE ■ KSA

Sample size: 2,002

% who intend to spend more time in country of residence this summer than last, by gender, age, income and family status



Q) Compared with last year will you spend more time in your country of residence this summer vs last summer?

Reason for intending to spend more time in home country

Almost half all respondents say staying in home country is driven by increased selection of leisure things to do.

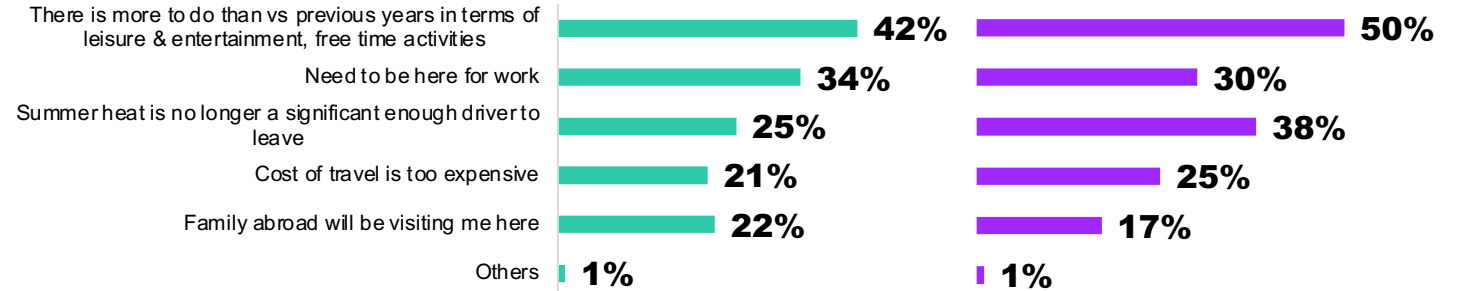
KSA respondents are even more likely to say there is more to do than those from UAE.

Those with children and higher earners are more likely to say more leisure things to do.

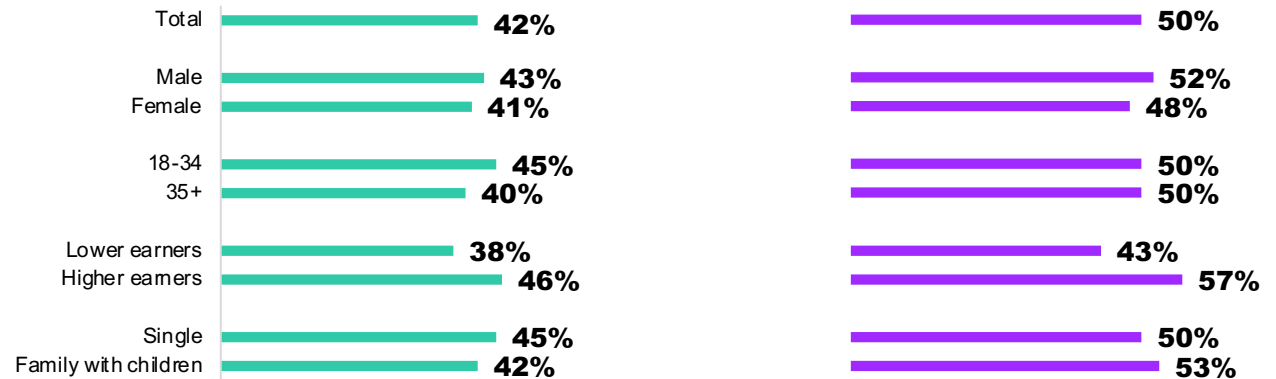
■ UAE ■ KSA

Sample size: 1432

Reason for intending to spend more time in country of residence this summer than last



Those agreeing there is more to do in terms of leisure & entertainment/ free time activities by gender, age, income and family status



Q) Please can you tell us why do you plan to spend more time in your country of residence this summer?

How they plan to spend free time this summer when in own country?

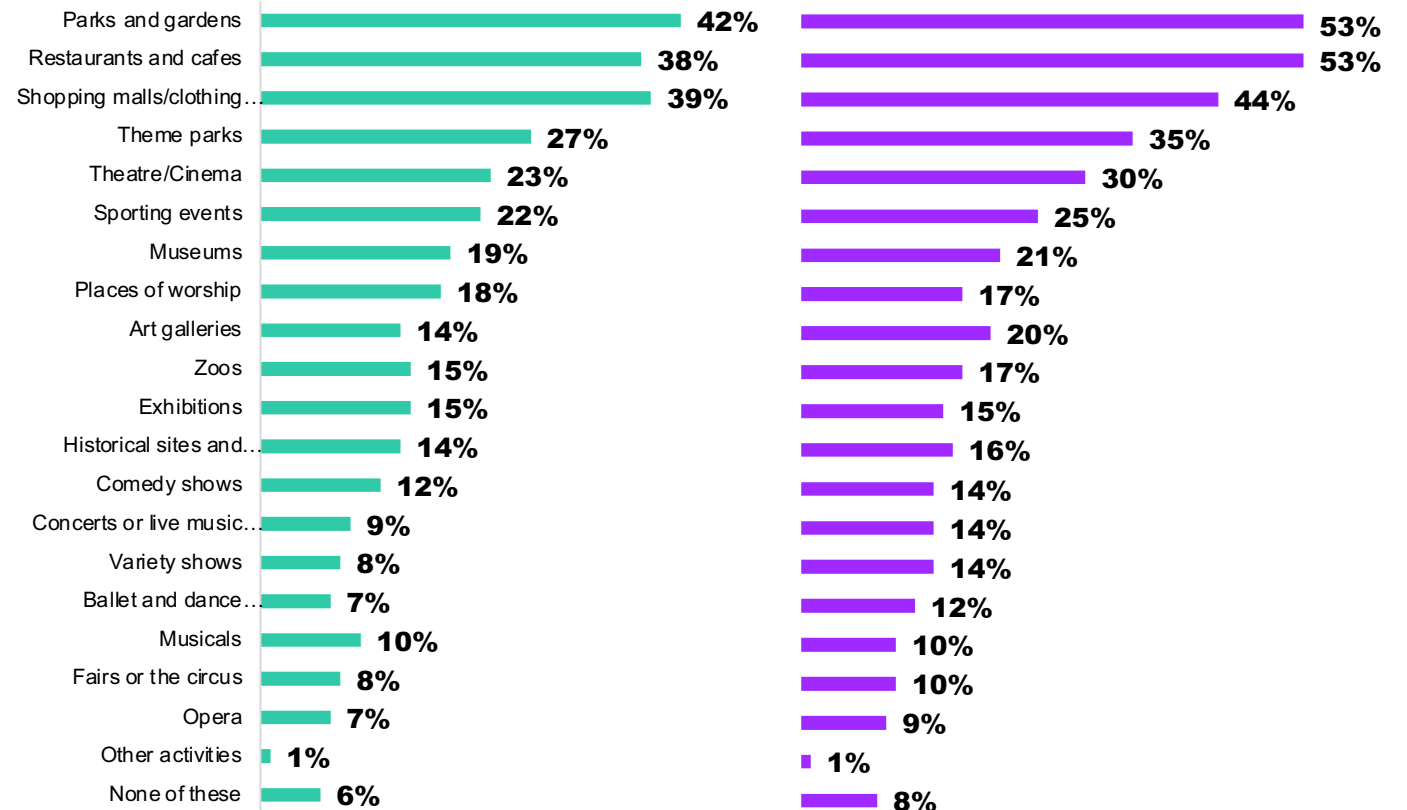
Respondents in KSA are more likely to pick almost all of these options, over-indexing most for restaurant and cafes versus those in the UAE.

Intention to visit theme parks is also greater in Saudi (35% vs 27%).

Generally all venues score higher among those that have children.

■ UAE ■ KSA

How do they intend to spend their free time in their own country this summer



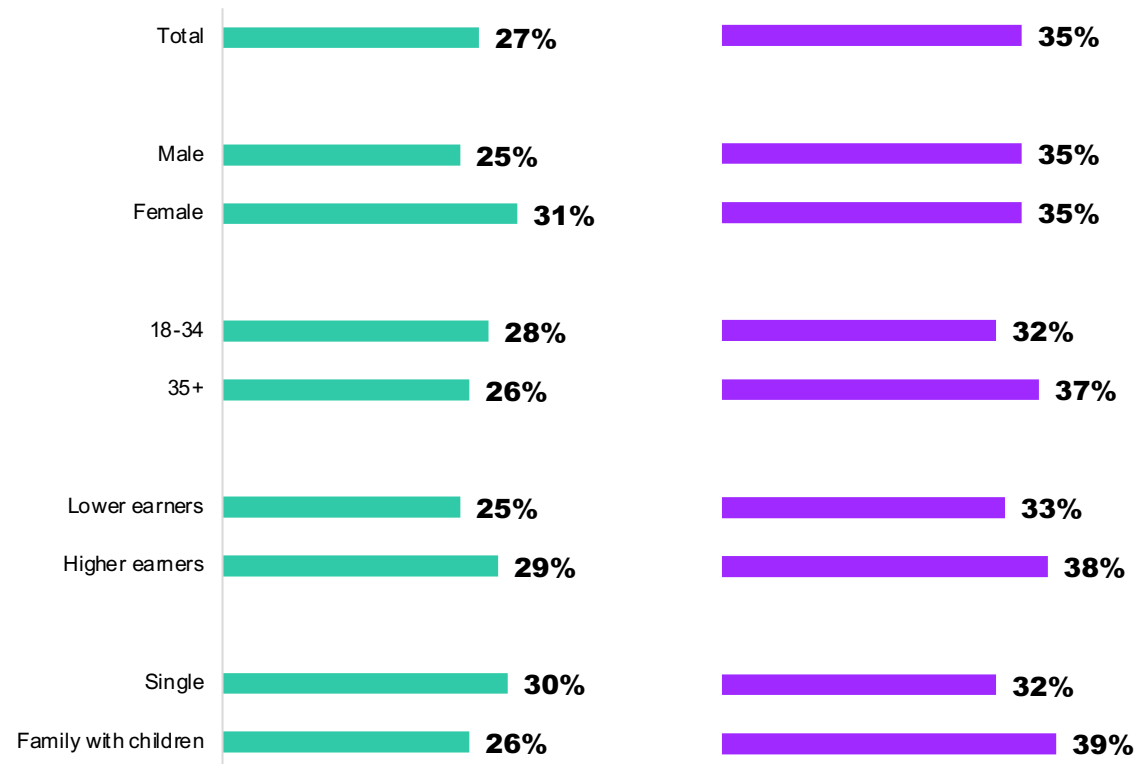
Q) How do you plan to spend free time whilst in your country of residence over this summer?

Theme Park visitors – who intends to visit

In UAE visiting theme parks over-indexes among women and single people, while in Saudi older higher earners and those with children over-index.

■ UAE ■ KSA

Those saying they will visit theme parks whilst in country of residence over this summer by gender, age, income and family status



Q) How do you plan to spend free time whilst in your country of residence over this summer?

Home country is becoming year round destination

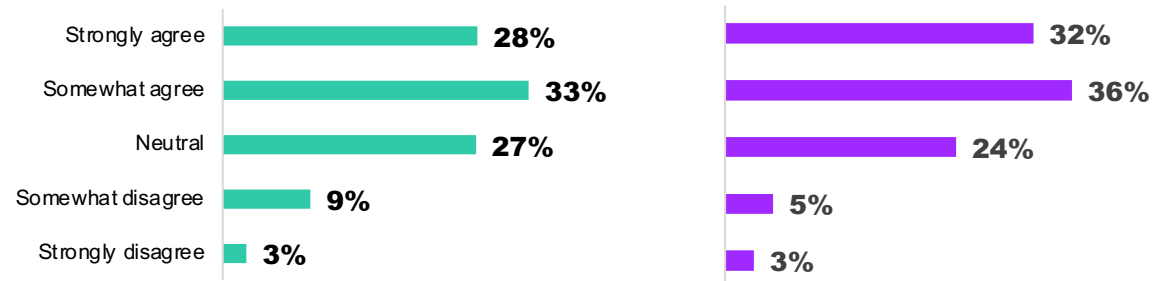
Those living in Saudi are more likely to strongly agree with idea that KSA is becoming all-year round destination (68% vs 61%).

Strong agreement is similar across all demographics but in Saudi higher earner and those with children are more likely to strongly agree.

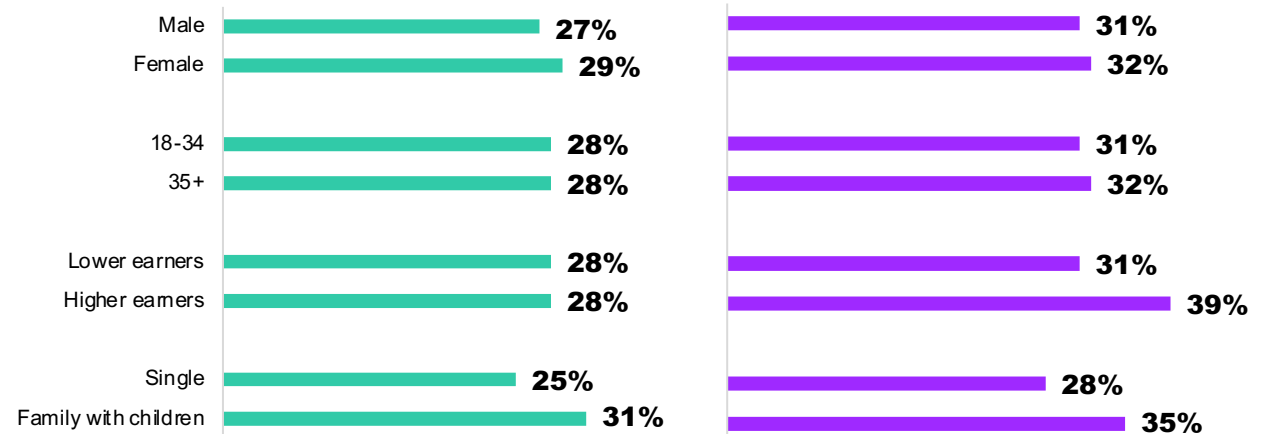
■ UAE ■ KSA

Sample size: 1432 (those intending to spend more time in own country over summer)

Agree/disagree: country is becoming a year-round destination due to positive developments in leisure & entertainment sector



Strongly agree: by gender, age, income and family status



Q) Level of agreement: My country of residence is becoming a year-round destination, including during the summer, due to positive developments in the leisure & entertainment sector

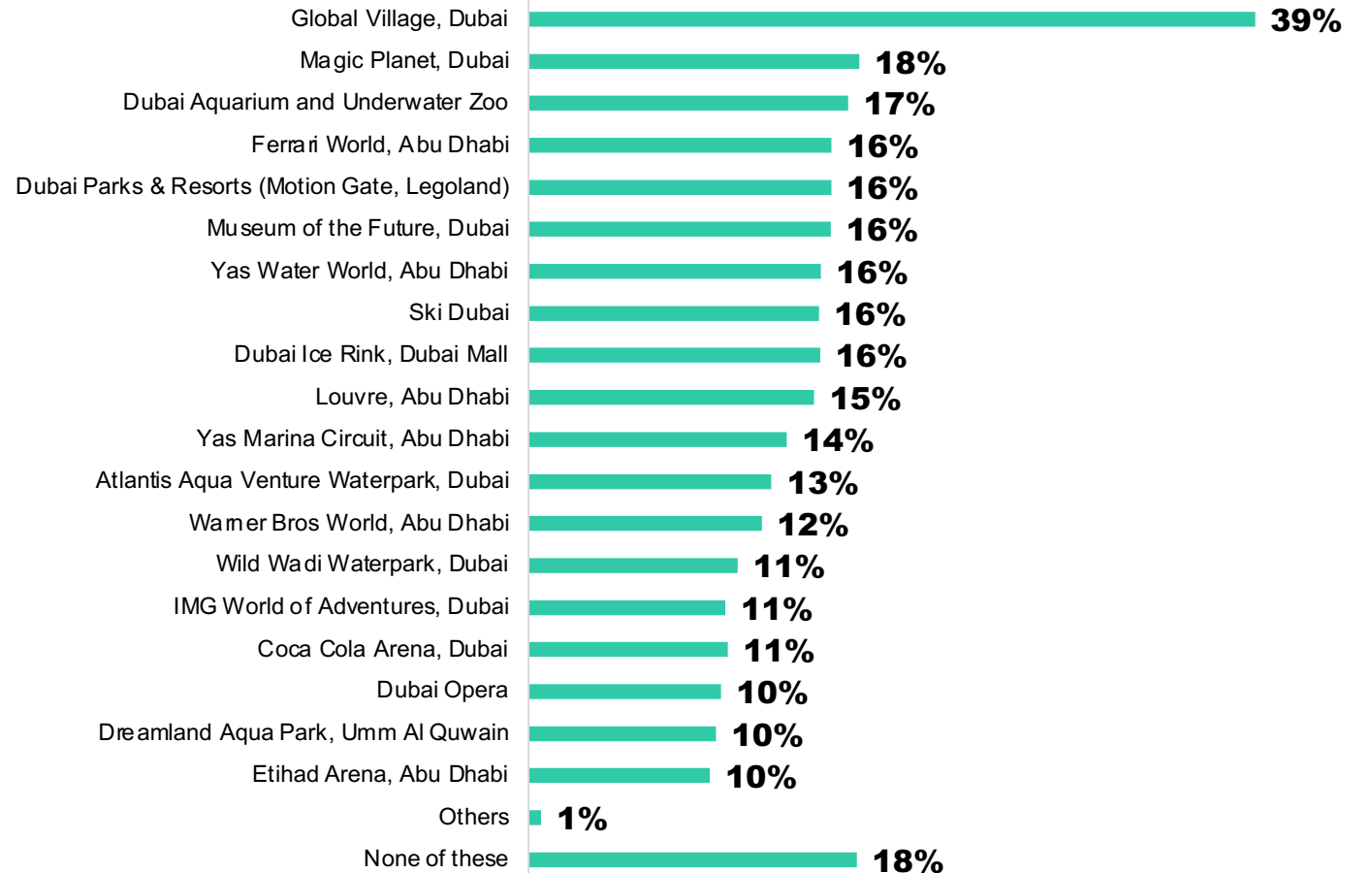
► Most Popular Attractions

Tracking visitation trends of the last year and beyond



Attractions visited in past 12 months

Almost 2 in 5 UAE residents visited Global Village Dubai in the past year, twice as many as any other venue.



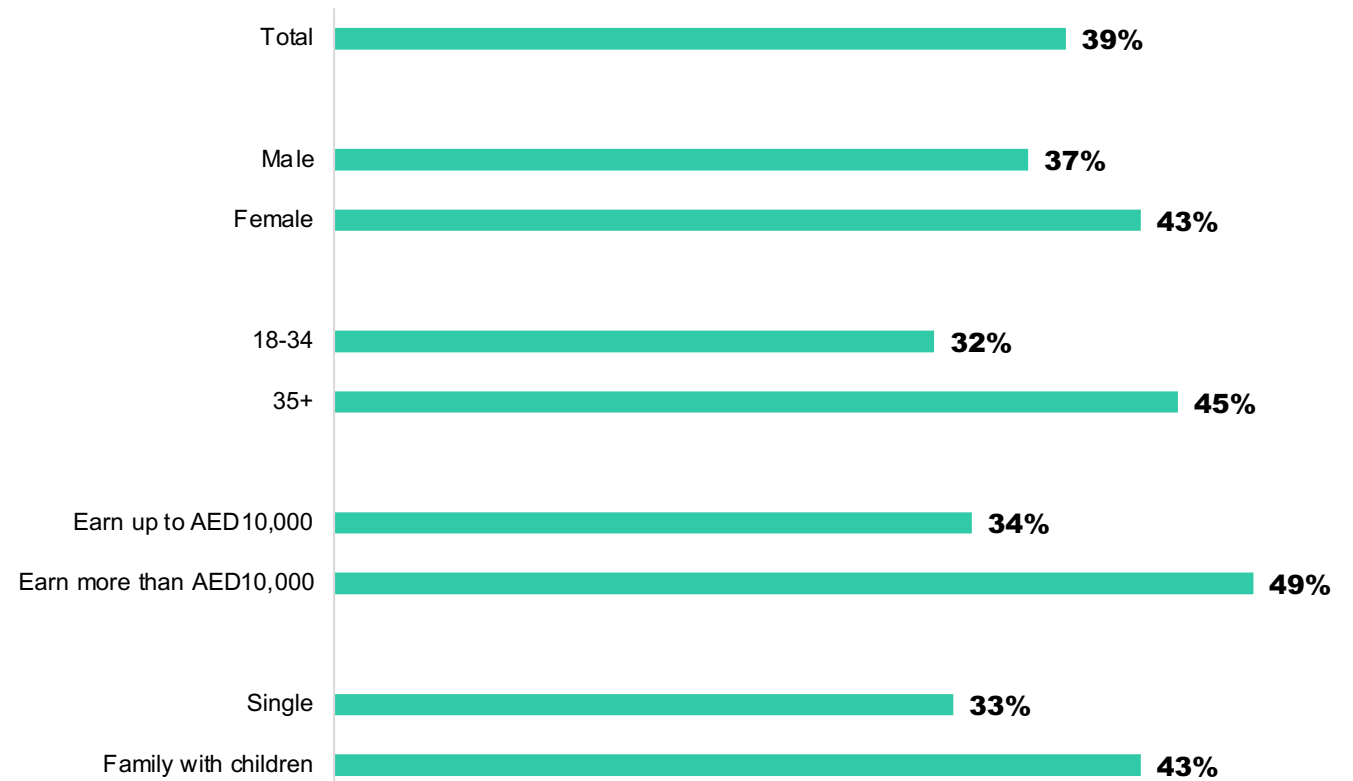
Q) Please select all the domestic attractions you have visited in the last 12 months?

Attractions visited in past 12 months

Visitors are more likely to be older, wealthier, women with children.

This profile is similar to the next most popular venues: Magic Planet Dubai and Dubai Aquarium, but Ferrari World is more evenly balanced across all demographics.

Demographics of visitors to Global Village Dubai



Q) Please select all the domestic attractions you have visited in the last 12 months?

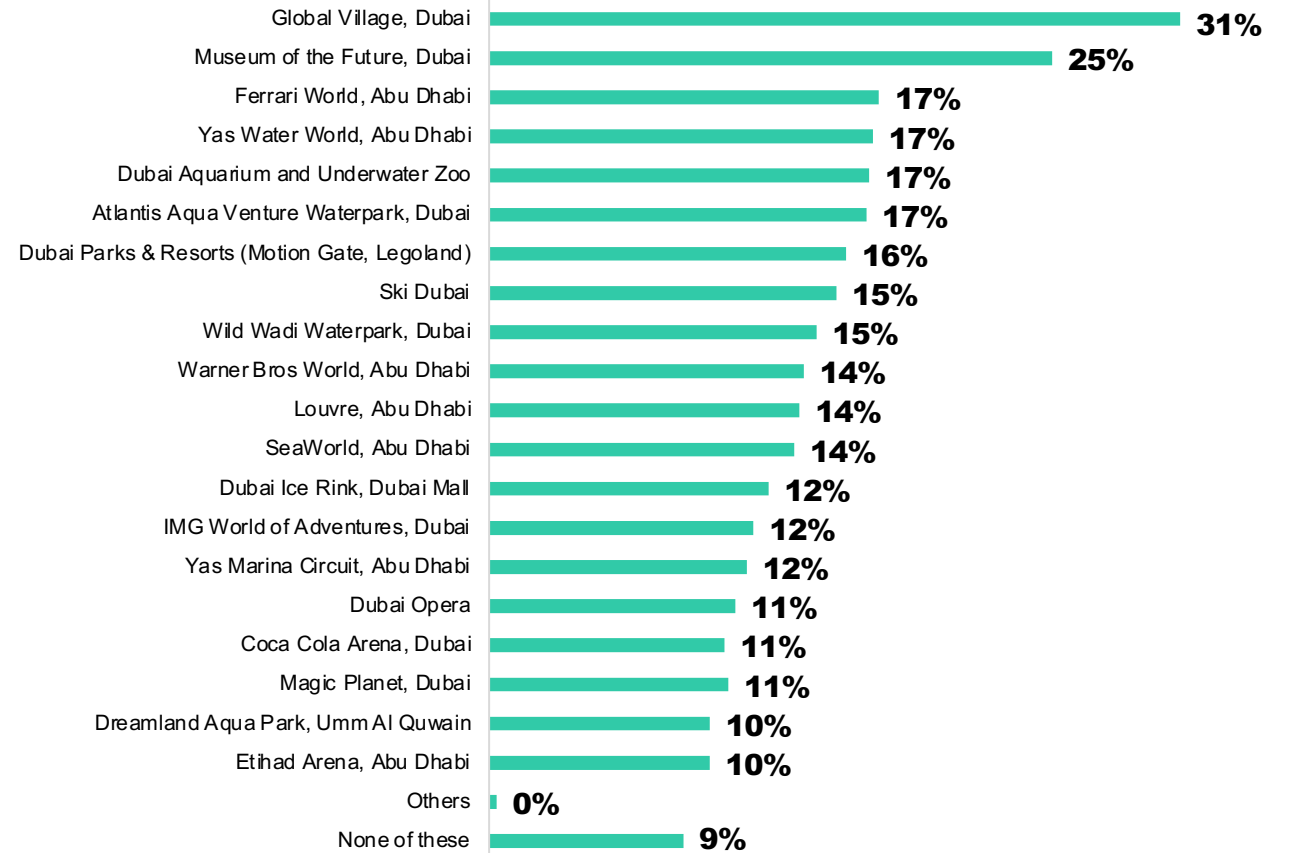
Attractions visited in past 12 months

Global Village tops the list of attractions to visit in coming year but Museum of the Future isn't far behind.

Four attractions are tied on 17%, two in Abu Dhabi and two in Dubai.

Museum of the Future was 6th on the 'visited' list but second for intention to visit, while Magic Planet drops from second to nineteenth.

Top 3 attractions UAE residents intend to visit/revisit in the next 12 months



Q) Which are the Top 3 domestic attractions you are most likely to visit/revisit in the next 12 months?

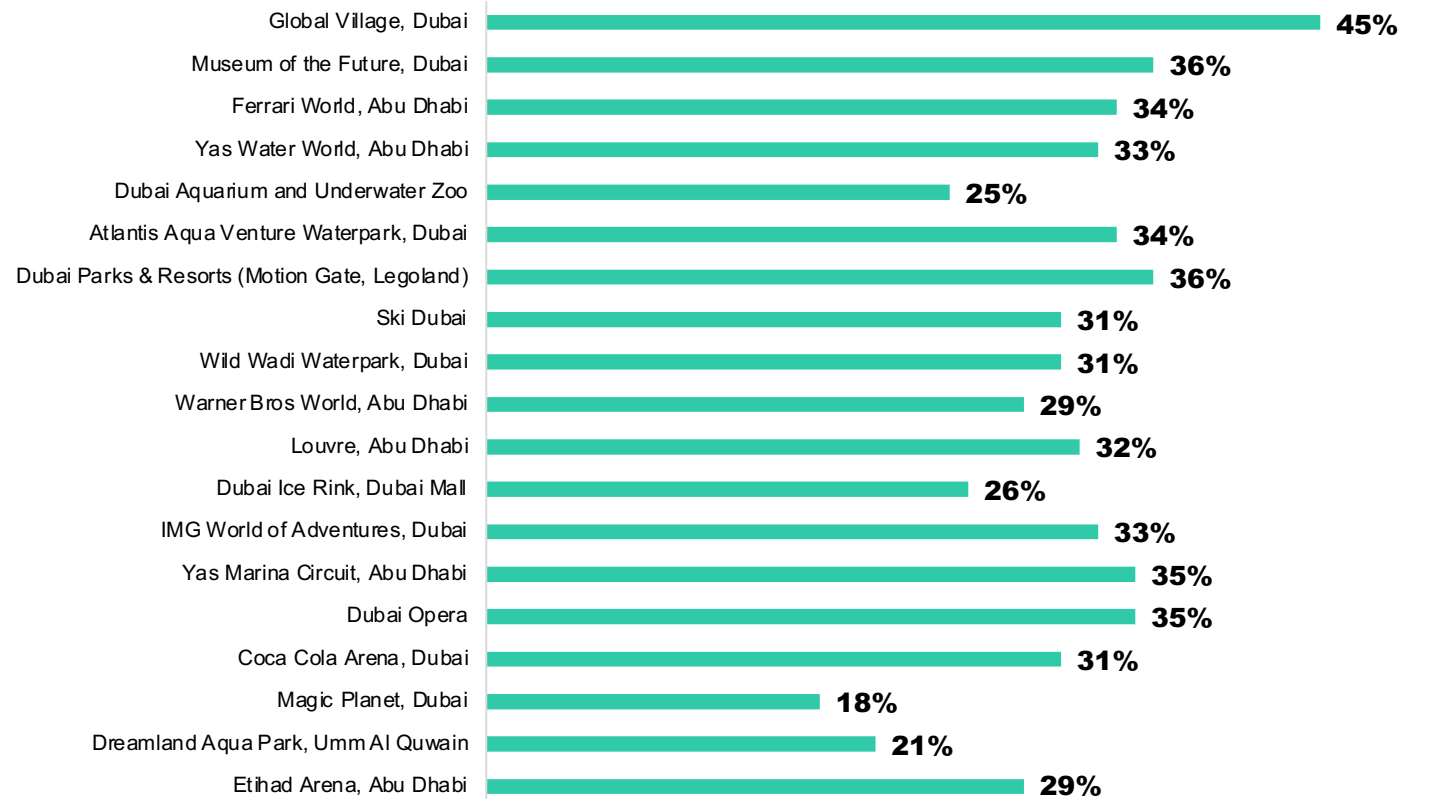
Revisiting attractions

Global Village tops the list for intention to revisit when asked to pick just three attractions. 45% of those who visited Global Village last year put it in their top 3 to visit this year.

Museum of the Future and Dubai Parks & Resorts come second on this measure.

Magic Planet in particular scores very poorly (18%), just above Dreamland. Dubai Aquarium and Ice Rink are also low scorers.

Proportion of visitors (in last year) who intend to revisit in next 12 months
 Ranked in order of total % who intend to visit



Q) Please select all the domestic attractions you have visited in the last 12 months?
 Q) Which are the Top 3 domestic attractions you are most likely to visit/revisit in the next 12 months?

▶ Annual passes

Purchase intentions and demographic insights



Who would consider buying an annual pass

Those living in Saudi are more likely to strongly agree with idea of buying an annual pass (35% vs 31%).

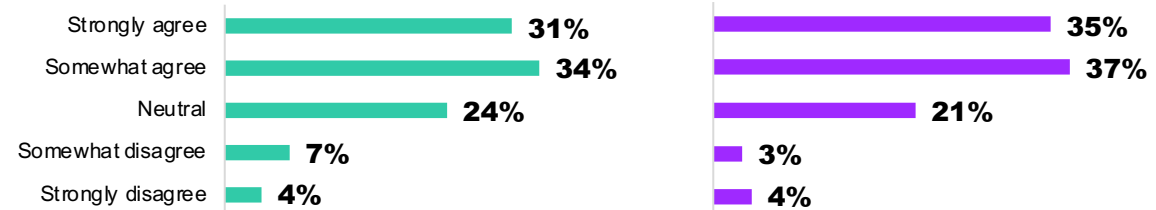
Interest is stronger with younger people in UAE but skews a little older in Saudi.

Saudi interest is also stronger with higher earners and those with children.

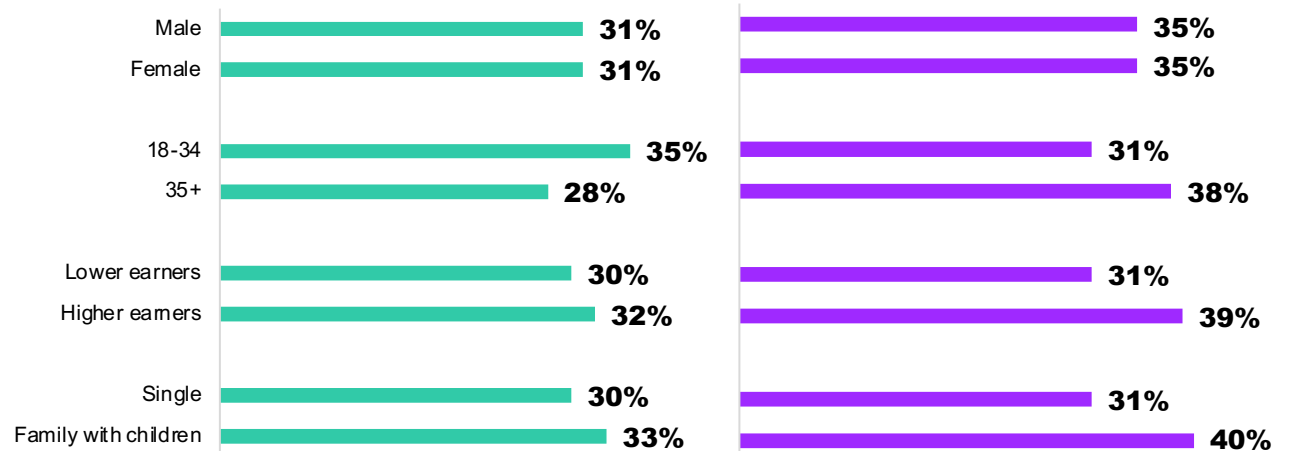
■ UAE ■ KSA

Sample size: 2,005

Agree/disagree: I would definitely buy annual passes to local attractions if they are at an attractive enough price



Strongly agree: by gender, age, income and family status



Q) Level of agreement: I would definitely buy annual passes to local attractions if they are at an attractive enough price

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