Culture in the 21st Century

Mapping Consumption Patterns in the MENA Region

Contents

Acknowledgements

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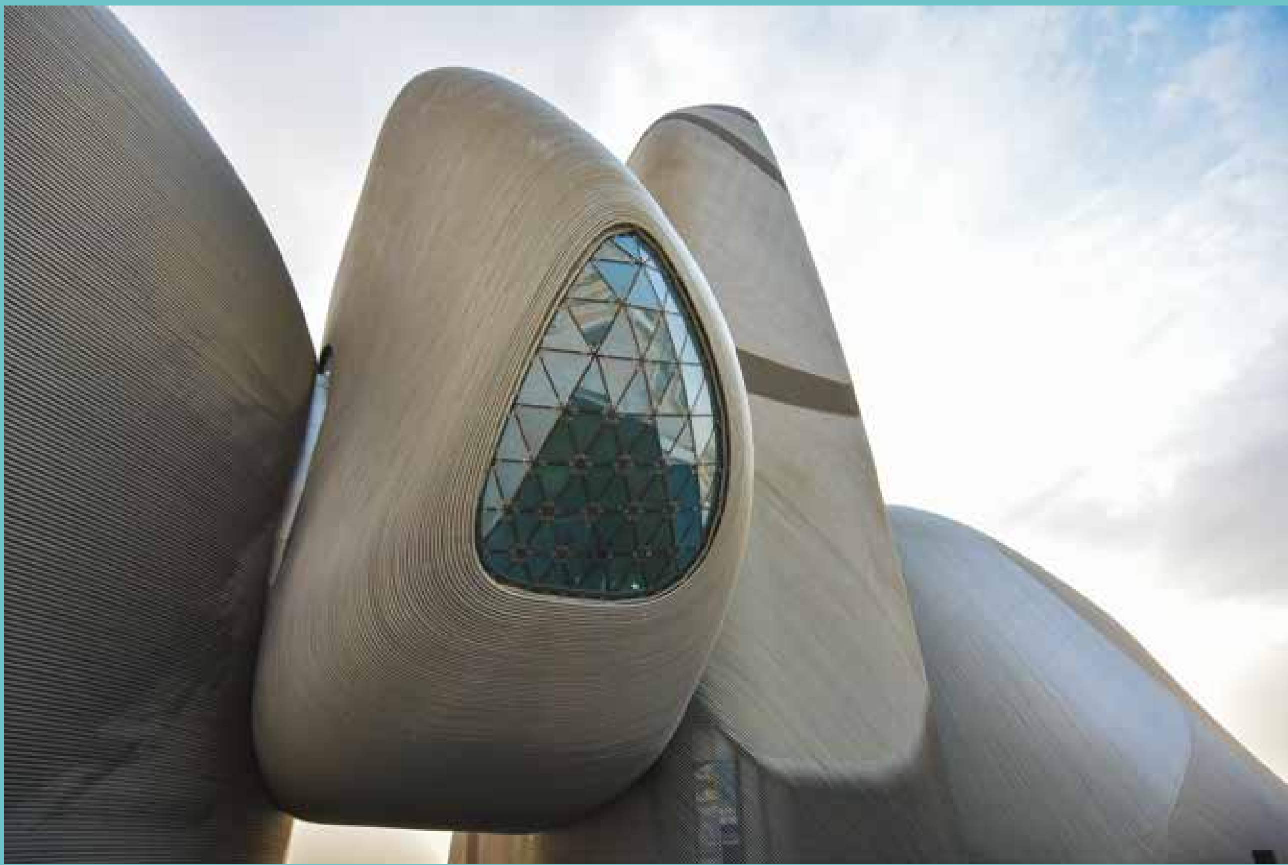
Culture is constantly evolving. Cultural activities differ across regions, countries and global communities and have diverged into different media, both offline and online. The Middle East and North Africa (MENA) region is no exception and is witnessing a transformational change in the way consumers perceive and consume culture. This transformation is causing both social and economic ripple effects in the region. In this context, it is crucial to understand the dynamics of cultural consumption in the MENA region.

As a leading cultural think tank in the region, the King Abdulaziz Center for World Culture (Ithra) wishes to promote a greater understanding of how cultural consumption is evolving regionally, with a focus on its economic and social importance. To complement their Culture and Creative Industries Index Landscape mapping report, which focuses on the current state of the cultural and creative industries in Saudi Arabia, Ithra commissioned a regional survey to understand cultural trends from a consumer perspective. Similar studies have been published in the past on the availability of culture in MENA cities. This report drives the conversation further, looking at cultural consumption on a deeper and more intimate level, which will be key as the region continues to transform. It presents demand-focused trends around cultural consumption across 10 cities in the MENA region: Cairo, Beirut, Dubai, Sharjah, Kuwait City, Muscat, Dammam, Jeddah, Riyadh and Manama.



This study contributes to the goal of elevating the region's cultural identity. Based on inputs from a regional survey of 5,000 MENA-based respondents, a set of interviews with regional experts and an extensive literature review, Ithra is confident that the cultural landscape in the MENA region faces a bright and collaborative future. Ithra hopes that all stakeholders and interested parties will find in this publication a clear overview of cultural consumption patterns in the region, allowing them to better understand its growth path and effectively target their regional audience. Ithra encourages all readers to engage with it in conversation and work together to take this research even further.

About the Report

This report, which was written by the Economist Impact (EI), focuses on mapping the cultural landscape and dynamics of cultural consumption in the MENA region. The report's findings are based on an extensive literature review and a consumer survey of more than 5,000 cultural consumers, with a representative sample of respondents from Cairo, Beirut, Dubai, Sharjah, Kuwait City, Muscat, Dammam, Jeddah, Riyadh and Manama. Additionally, the EI conducted in-depth interviews with over 20 regional experts and market participants, from different fields of work, such as policymaking, academia and research as well as multidisciplinary service providers such as artists and curators.

In the subsequent sections, this report attempts to define, describe, and analyze the MENA region's cultural landscape from a demand perspective and visualize it as a 'Culture Map' that highlights the availability of cultural activities and levels of engagement across ten MENA cities. For each city, the report also highlights the key gaps that need to be addressed to increase engagement in culture and suggests policy measures to address these gaps.

The report seeks to drive conversation on how to boost cultural engagement in the MENA region, with the ultimate objective of contributing to the promotion of culture and cultural exchange within the region. This will help stakeholders expand their understanding of how culture is consumed and why it is consumed the way it is: helping policymakers, cultural service providers, entrepreneurs, multilateral agencies, researchers, third-sector entities and most importantly, the modern consumer better understand the cultural industry they are currently engaging in. It will also guide on motivations for engaging in cultural activities, key activities of interest and the most convenient ways and means to engage in culture.

A Note on Covid-19 and its Impact on the Research

Covid-19 was declared a global pandemic by the World Health Organization (WHO) while the research for this report was ongoing. Although the survey was controlled for any presence of significant bias created by the pandemic, we were able to identify pre- and post-Covid-19 impacts on culture through inputs from expert interviews. This became a unique piece of documentation on culture in the region before the global pandemic instilled what may be permanent changes to social behaviors and cultural consumption patterns. This report may serve as a baseline for further studies on cultural outlook and the perception of culture in the MENA region after the impacts of the Covid-19 virus have been fully established.

Executive Summary

Cities in the Middle East and North Africa have distinct cultural offerings, underpinned by a millennium of history and a youthful and diverse population. The fusion of these elements defines how culture is consumed in the region.

Cultural participation is on the rise across the MENA region, with growth prospects strongest in the UAE (Dubai, Sharjah), Saudi Arabia (Dammam, Jeddah, Riyadh) and Egypt (Cairo).

Understanding these patterns will improve access and enrich how people experience and interact with culture. This study combines findings from an extensive literature review, a survey of more than 5,000 cultural consumers and in-depth interviews with more than 20 regional experts and market participants. The following key trends emerged:

Cultural participation in the MENA region is high and rising: Cultural participation in the region is approaching the levels seen in countries with highly established cultural and creative industries. For example, in the UK, 39% of the 'culturally active' population visit cultural sites more than twice a year, in the MENA region this figure is 32%. However, whereas annual cultural participation in established markets remains relatively static, almost half of the cultural consumers surveyed by the EI in the MENA region expected to visit cultural sites more times in the next 12 months than in the previous year. The proportion of respondents who expressed these views were relatively higher for the three Saudi Arabian cities (61%) as well as for Cairo, Dubai and Sharjah (57%).

Demand for cultural participation in the MENA region is growing and is being driven by improvements to cultural offerings.

Culture is important to MENA residents: Across all age groups and genders, interest in culture is high. Over 90% of respondents expressed that cultural participation was more important to them and more than 75% of respondents saw cultural participation as more important to them than comparable entertainment options, such as playing sport. Improvement in cultural offerings is driving participation: Over 80% of respondents felt cultural activities in their city had improved in the last year. However, this was driven more by improvements to existing offerings rather than by new sites. More than 40% of people who felt that availability had improved cited improvements to existing offerings as the key reason.

Digital mediums are further driving cultural participation and awareness.

Digital is emerging as a key medium to engage in culture: Some 80% of respondents thought it was possible to engage with culture online, and over a third had participated in culture online in the last year. Another 57% of those who participated digitally opted to stream content, making it the most popular form of digital engagement.

Social media is the most widely used source of cultural information: Cultural consumers in the MENA region consider social media an important means for keeping in touch with cultural institutions on a more regular basis. Over a third of survey respondents selected institutions' social media pages as their key source for remaining informed on their cultural activities and events.

While Heritage and History is the most popular theme, there is increasing interest in storytelling among the youth.

Particular interest exists for Heritage and History: Museums and other historical sites are the most visited cultural sites across all age groups; more than 40% of respondents had visited one in the last year. Another 35% of respondents identified this theme as the most representative of their city's cultural identity.

Storytelling is emerging as a means of cultural exchange: The MENA region's creative youth have been using storytelling as a means of documenting and sharing their cultural story. Some 20% of youth want to visit sites related to Film and Television (which is almost as high as the number of youth wanting to visit sites related to Heritage and History).

The challenge is to ensure that growth in cultural consumption is inclusive and the demand is met.

Demand for certain experiences is not being met: For certain themes, consumer demand is not being met in most cities. An example being Film and Television, where the research showed a gap between availability (where most cities scored low) and relative priority of participation (which consistently rated high across most cities).

Participation differs by income levels: High-income respondents participate in cultural activities more frequently than low-income respondents and are likely to participate more in the future (65% of high-income respondents expected to visit cultural sites more frequently in the coming year compared to 47% of low-income consumers). This is partly driven by an information gap; 37% of low-income respondents saw lack of information as a barrier to participation, compared to 26% of high-income respondents.

Digital divide prevails: Though one of the main drivers of growth, digital participation needs to increase further to meet high demand (80% of respondents agreed with the statement "a person can participate in culture online;" however only 33% reported any actual online cultural participation). This may require special attention to encourage digital participation amongst women, which is slightly lower than amongst men; 30% women participated online in the last year vs 35% of men. Cultural institutions should undertake further market research into the kinds of cultural activities people would be interested in for online engagement, barriers to participation, and willingness to pay. Moreover, by analyzing different preferences for consumers based on age, gender or area of interest, cultural institutions can tailor their offer accordingly.

Cultural institutions in the MENA region should learn from each other's distinct strengths to help boost consumers' participation across the region.

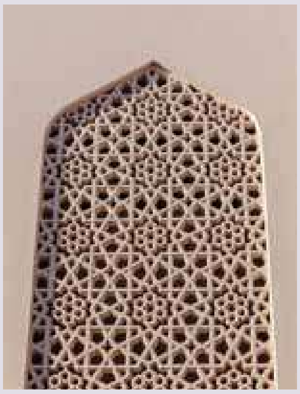
In newer markets, like Saudi Arabian cities, there is a need to focus on increasing international as well as local visitors. The last visit to a cultural site for over 85% of respondents in Jeddah and Riyadh was within the city, suggesting cultural participation remains predominantly local. In cities with more established cultural landscapes, like Beirut, the offerings need to be re-invigorated to attract fresh interest. Only 28% of respondents in Beirut expressed a desire to increase visits to cultural sites, indicating a lack of satisfaction with existing offerings.

Partnerships between cultural institutions across the region can help drive exchange of expertise. For example, institutions in high-growth markets can support others in new ways to drive engagement. While those in markets such as Cairo and Beirut can share their experiences in catering to international consumers.

Introduction

01

Culture in the 21st century



Few elements of human social behavior are more dynamic than culture. Culture is a reflection of the ideas, customs and social behavior of a particular society and evolves constantly over time, across communities, countries and regions.

Cultural participation is a part of everyday life and it contributes strongly to the quality of life of a given community. Its evolution moves in parallel with that of technology, as it quickly adapts to new media. The internet and social media are extending the field for cultural participation, allowing previously low-participation groups to access cultural offerings. The rapid spread of information technology in the 21st century means that culture is now ever present in most people's lives. Consequently, culture has become a currency of sorts, benefiting a country's economy in terms of tourism revenue and governments are becoming increasingly aware of its importance.

Given the rise in global travel, as well as the exchange of ideas across borders, the importance of culture as a pillar of economic growth is of particular importance. A 2012 study by UNESCO identified culture as a powerful driver for development, with economic, social as well as environmental impacts. By January 2012, culture was included in 70% of United Nations Development Assistance Frameworks, making it an integral part of national development priorities in most countries. Over the course of time, culture continued to commercialize and transform into an economic catalyst.

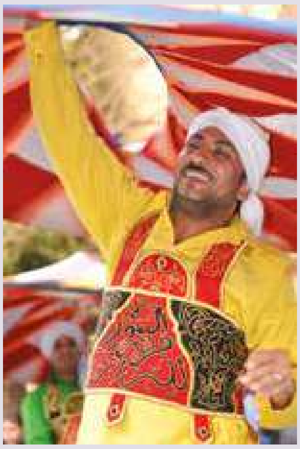
According to a 2017 study by UNESCO, global cultural and creative industries generated $2,250 billion in annual revenue and created 30 million jobs. The MENA region, in particular, is among the regions where the creative industry is growing the fastest, at more than 10% a year.

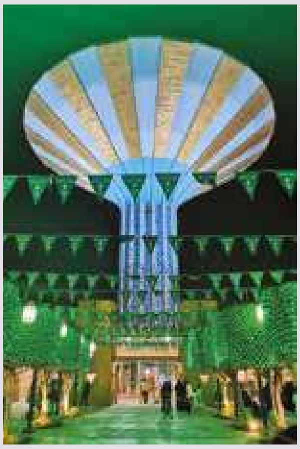
A rise in consumer demand for "experiences" rather than material goods, particularly among younger generations, means the market for cultural consumption has tremendous potential if properly developed. Culture is also becoming more democratic and open to all. There are ample markets to be found for anything from opera performances to electronic music, and from award-winning literature to comic books. In short, there are few areas of the human experience that have not been recognized in the collective definition of culture in some way, even though the ways in which policy, investment, and behavior interplay are often not well understood.

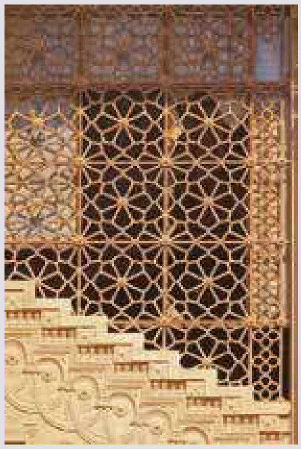
According to policymakers from the region, the importance of culture is reflected in its growing use as a medium for self-reflection and in attempts by the region’s creative artists to be part of a more global conversation. The definition of culture in the MENA region is expanding beyond its traditional Arabic meaning, and its appeal broadening beyond intellectuals and elites.

The availability of new platforms for cultural expression has opened the opportunity for regional culture to spread to the masses and for cities and countries to carve a global niche. Artists are using their international connections and platforms such as film, music and performing arts as a medium to work towards building societies that are more inclusive and are using their work to address bigger societal issues. However, there is still room to improve our understanding of how consumers are engaging in culture, and how both bottom-up and top-down approaches are being used to fulfill the region’s promise as a major global center for culture.

Over the past two decades, the region has rapidly expanded cultural services to its populations as well as to the millions of tourists and expatriates who visit or live in these countries. Gulf states, such as Saudi Arabia, the UAE and Oman now boast vibrant cultural hubs, world-class cultural events, and striking museums designed by leading international architects. Other countries in the region, such







as Egypt and Lebanon, already have a strong background in film-making, photography and literature in addition to rich histories and intangible cultural elements, such as cuisine. Whether benefiting from the bustling energy of its young creative class, or taking advantage of government-led projects, like those in the Gulf states, the region's capacity to expand its cultural offerings is evident. However, the region needs to build on this expansion to collectively maximize its potential for growth when it comes to cultural promotion and exchange.

Culture as a national strategic priority: developing authentic cultural offerings

Recent efforts by the Gulf states to position themselves as major global cultural players have been remarkable. Despite many well-publicized cases of "cultural diplomacy" between the Gulf states and the West (the opening of the Louvre Abu Dhabi being a notable example) and efforts to promote a cosmopolitan experience in their cultural offerings, it is important to note that many of the most ambitious new cultural projects are distinctly Arab-focused.

This suggests that cultural development in the region goes beyond an attempt to replicate a Westernized cultural landscape that caters predominantly to tourists and expats, but rather to showcase the vernacular elements of their culture at a global level.

As a result, governments in the region are taking a highly proactive approach to strengthening their countries' cultural offerings and are including culture in large-scale national plans. One of the first to do so was the UAE, which has been promoting its UAE Soft Power Strategy since 2016. This strategy aims to increase the country's "global reputation abroad by highlighting its identity, heritage [and] culture." So important is the cultural component of this strategy that it is one of its four main objectives and aims to establish the country as a "regional capital for culture, art and tourism" alongside becoming a gateway to the region.

Other countries have since followed suit with similar grand development plans. For example, the Saudi Vision 2030 includes an important

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cultural component, which states that culture is "indispensable to our quality of life." The announcement of Vision 2030 was followed by the creation of the Ministry of Culture in 2018. Its objective is "a flourishing of arts and culture across Saudi Arabia that enriches lives, celebrates national identity and builds understanding between people." This involves capitalizing on Saudi Arabia's rich cultural heritage while also supporting new forms of cultural expression. The multidimensional aspect of cultural development sees it not only promote culture as a way of life, but also enhance its contribution to economic growth and global cultural exchange.

Aside from the UAE and Saudi Arabia, other states in the region have also recently integrated culture into their national development strategies. Oman's Vision 2040 has "citizenship, identity, national heritage, and culture" as one of its major pillars. It aims to cultivate "a society that is proud of its identity and a culture that reinforces citizenship." Kuwait's Vision 2035 is less directly focused on culture compared to its peers, yet it includes culture as one of the spheres through which the government intends to enhance its global position. Similarly, Egypt's Vision 2030 identifies culture as a key pillar in the social dimension of its sustainable development strategy.

The pervasiveness of comprehensive national programs and frameworks is encouraging and signals the importance that leadership has placed on cultural development. From a more granular perspective, an understanding of the preferences of individuals and communities is useful to identify areas where public policy can be used to spur inclusive cultural development.

Defining Culture

02

What is culture?
The search for a modern definition

As a concept, culture has evolved over time. In recent decades, it has started to encompass elements of social expression that may not previously have been described as such.

One of the most well-known modern definitions of culture comes from British anthropologist Edward Burnett Tylor, who in *Primitive Culture* (1870) defined it as "that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society." Tylor's definition was more universal than earlier definitions, implying that it was a feature of any society regardless of its state of development. For example, a few years prior, poet and school inspector Matthew Arnold in *Culture and Anarchy* (1867) defined culture as "the study of perfection." Thus relating it exclusively to special intellectual or artistic endeavors.

The conflict between definitions of culture as universal to society rather than a particular subset of it, sometimes referred to as "high culture," persisted well into the 20th century.

Elements of high culture were typically defined as those that were consumed by a limited section of the population, particularly those of higher socio-economic status and education. Theater, literature and fine art, among others, are forms of culture that are often seen as the "classics." At the other end of the spectrum, activities designated as "low culture" were those designed for mass consumption, including television, comics and popular music. The poorer perception of the latter, however, sits at odds with the fact that these "lower" forms of culture are better suited to new forms of media and artistic spaces. This has generally forced "higher" forms of culture to broaden their mandate in order to secure their appeal among new generations.

A key factor leading to greater acceptance of "lower" forms of culture, such as video games and pop music, is the market size they command, given their mass appeal. Video games are making higher sales than any other medium and musicians are making more money

Museum; Ithra

from social experiences like concerts and festivals, and using music subscription services, which are being widely purchased.
Other definitions attempted to differentiate the tangible from intangible aspects of culture. For example, organizational expert Edgar Schein described a three-level model of organizational culture, which has been adapted to describe culture on a societal level. The top layer is composed of artifacts, visually or verbally identifiable elements such as art, architecture, fashion and audible behavior. The middle layer encompasses values, a society's philosophy and statements of identity that members of that group are aware of. Finally, the lowest layer is basic assumptions, which describe a society's relationship to the environment, reality, time, and space in terms of human activity and human relationships.

In light of the social roots of culture and its various definitions, culture can be best understood as a holistic, multidimensional phenomenon. Equally important, it is becoming more inclusive.
The framework for this study adopts this concise understanding of what culture is; one that draws not only on international definitions, such as that used by UNESCO, but can also be applied specifically to the MENA region, with the cultural consumer at its core.

According to the experts interviewed for the study, "it is now widely understood that culture is a channel of communication and exchange between individuals, communities and nations, becoming less a set of actions and experiences but rather an identity." This identity has important connotations for diplomatic influence and soft power. Furthermore, this identify has spurred cultural development strategies, in many regional countries in particular, to move from being a purely bottom-up phenomenon to an effort that combines resources from major public, private, and third-sector players.

What is culture?

Culture is the set of activities participated in (consumed) physically or virtually for personal and societal enrichment. This definition is particularly helpful for framing a discussion on culture in the MENA region from the perspective of cultural consumption. It defines culture across six measurable themes to make it consumer focused.

ART AND DESIGN

PERFORMANCE AND CELEBRATIONS

LITERATURE AND POETRY

HERITAGE AND HISTORY

FILM AND TELEVISION

FESTIVALS

Culture and its classifications

While a definition of culture is essential to conceptualize it, for practical purposes such as policymaking and statistical analysis, it is necessary to classify it across different domains.

Since the 2000s, numerous countries have attempted to measure different aspects of culture and cultural participation in order to help frame national policies and culture.

These surveys generally measure various cultural domains across socio-economic and demographic groups. Some examples of these surveys include:

- A 2005 Canadian survey (a profile of the cultural and heritage activities of Canadians) commissioned by the Canada Council for the Arts identified the five main sectors for data collection as live performances; art galleries and museums; historical sites and other heritage organizations; books, magazines and newspapers; and media, multimedia and audio-visual.

- A 2008 French survey (Les pratiques culturelles des Français) commissioned by Ministère de la Culture et de la Communication focused more broadly on different technologies through which culture could be transmitted and accessed, with the domains identified being audio-visual; computer and internet; television; DVD and cinema; radio and listening to music; reading (books and press); attendance at cultural events and places; and amateur practices.

- A Eurostat Cultural Statistics survey conducted in 2007 and 2011 across all 27 EU member states measured numerous cultural practices, such as going to the cinema, attending live performances and visiting cultural sites, as well as involvement in artistic cultural activities. The survey was combined with indicators such as internet access and its role in obtaining and sharing cultural content as well as purchasing cultural goods online.

The classification of culture across different domains has also made it easier for international and local agencies (such as culture ministries and government departments) to separate and specialize the nature of their work. For example, the Department of Canadian Heritage classifies culture across five sub- components i.e., creativity, arts and culture, heritage and celebration, sports, diversity and inclusion and official languages. Meanwhile, the Ministry of Culture in Italy has 10 broad classifications i.e., museums, archaeological heritage, education and research, archives, libraries and cultural institutes, equality, film, theater, architecture, and festivals.

As the global authority on defining and classifying culture, UNESCO’s classification, which comprises numerous tangible and intangible domains, is the one that serves as the basis for this study. However, the objectives of this study require the UNESCO classification to be adapted for the purpose of making it consumer-focused. This resulted in six main themes, modeled on UNESCO domains, that consider both "how" culture is consumed as well as "where" it is consumed. The six themes are described as follows:

ART & DESIGN

A place or thing I want to see

- Gallery
- Site of modern architectural interest

PERFORMANCE & CELEBRATIONS

A place I go to watch or perform

- Concert hall
- Opera House
- Music
- Practice room

LITERATURE AND POETRY

A place or thing I want to see

- Library
- Book launch
- Other literary events

HERITAGE AND HISTORY

A place I go to learn about the past

- Monument
- Archaeological site
- Museum
- Archive
- Building of historic architectural significance

FILM AND TELEVISION

A place I go to watch a screen

- Film festival
- Cinema
- Film or TV studio

FESTIVALS

One place for different forms of culture

- Heritage festivals
- Open-air forum
- Multi-format exhibition

Source: EI analysis

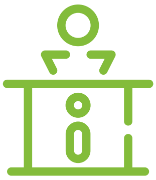
This study's classification of culture is particularly relevant to key audiences, and will make it easier to guide critical policy and strategy decisions when it comes to cultural promotion. By being consumer-focused, the classification answers numerous key questions directly, such as:

- **What motivates cultural consumers to engage in culture?**
- **What are the key activities that cultural consumers pursue?**
- **What are the most convenient ways and means by which cultural consumers engage in culture?**
- **Which activities interest cultural consumers more?**

Answering these questions will be a major part of this report's contribution. For example, policymakers will have a greater understanding of cultural consumption patterns, which will help guide cultural policy interventions across multiple domains. Service providers will be able to identify specific demand patterns and cultural hot-spots, which will help to drive business strategy. Other organizations, such as NGOs and international agencies, will benefit from having a comprehensive overview of the cultural ecosystem, which can guide initiatives in culture promotion and exchange. Finally, cultural consumers will have insights on the accessibility of cultural offerings as well as their modes of engagement.

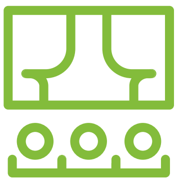
Key beneficiaries:
Stakeholders for the research and key takeaways

Policymakers and academics
Understanding of cultural consumption patterns to guide policy interventions across key themes



Service providers
Demand patterns and cultural hot-spots to drive business strategy

Other entities*
Overview of cultural ecosystem to guide initiatives in culture promotion and exchange
*NGOs, international development organizations, academics



Cultural consumers
Insights on the availability of cultural offerings, modes of engagement and relative preference of cultural experiences

Source: EI analysis

Baron Palace; Cairo

Cultural Consumption Trends and Patterns in the MENA Region

03

Public and private sector approaches to cultural development in the MENA region

Al Janadriyah Festival; Riyadh

The evolution of the MENA region's cultural landscape has not been homogeneous. Sub-regions have experienced different paths, driven by the state of their economic development as well as their foundational level of cultural development.

The oil-rich Gulf states, which have seen the fastest pace of economic growth, have taken a top-down approach to cultural development and are spending significant amounts of public funding on building institutions, frameworks, infrastructure and spaces to enable a creative class to thrive. They also started from a smaller base. This process is best exemplified by the four largest Gulf countries, namely Saudi Arabia, the UAE, Oman and Kuwait. An exception is Bahrain, whose efforts at cultural development remain primarily driven by the private sector.

In contrast to the wealthier Gulf countries, the Levant and North Africa have pursued a bottom-up approach to cultural development, driven by private initiatives. This is largely the result of more significant resource constraints, stemming from weaker economic growth and political instability, which effectively impede long-term, government-led plans. However, despite this potential disadvantage, these countries started from a much stronger base, with countries such as Egypt and Lebanon boasting incredibly vibrant cultural scenes and diversity.

According to art experts from the region, this vibrancy has been capitalized on by artists, social activists, and other cultural players and stakeholders, and given rise to numerous collectives and platforms that drive cultural identity. Examples include the Contemporary Image Collective in Cairo (visual arts), Ashkal Alwan in Beirut (plastic arts) and the Makan Art Space in Amman (contemporary art). Unfortunately, institutional and financial support from the government has been lacking. Public funding for the arts in Beirut, for example, was described by experts as "negligible to non-existent." A lack of economic and political stability has also precluded the creation of national development programs with large cultural components in the same vein as those in the wealthier, and more stable, Gulf states.
The public sector is a key regional driver, with notable public efforts and resources in the Gulf region being invested to develop the

cultural sector into a major economic driver. With relatively extensive public budgets and resources available, Gulf governments have taken a proactive approach to engaging cultural consumers through the development of cultural spaces for the performing arts, financing film-making and other cultural endeavors. These investments are key to building a thriving cultural landscape.

Along with funding, various regional governments have passed specific legislation aimed at facilitating cultural engagement, with notable examples across the region including:

- A Dubai initiative (part of the city's Vision 2021) to make film-making cheaper and reduce associated red tape, taking advantage of its increasing allure as a film-making destination for Hollywood and Bollywood.
- The lifting of bans on certain kinds of cultural activities and venues, such as cinemas in Saudi Arabia (2018).
- The granting of tourist visas to Saudi Arabia in 2018, which will be an important catalyst for cultural development.

Even outside of the Gulf region, some public efforts are noteworthy. Spurred by heritage organizations, Lebanese authorities are increasingly seeking to preserve historic buildings that were damaged by its civil war, rather than have them demolished. Many are being refurbished as galleries and cultural centers.

Governments have also acknowledged the considerable need for the region's cultural landscape to be noticed, both locally and internationally. To this end, countries have stepped up their efforts to launch festivals, fairs, exhibitions, and biennials across many different artistic realms. These events have demonstrated an emphasis on niche cultural topics and specializations.
Among the most notable festivals and exhibitions in the region are:

International Book Fair; Sharjah

- The Dubai Jazz Festival, which has taken place on annual basis since 2003 and has now expanded to other genres beyond jazz.

- The MDL Beast Festival, held in Riyadh for the first time in 2019, which is attempting to position itself as a leading regional electronic music festival.

- More traditional festivals that focus on Arab heritage are also gaining traction, such as the two-week Janadriyah Festival in Riyadh, or the Sham el-Nessim spring celebrations in Egypt, an event that dates back to ancient times.

- Art-related events such as the Sharjah Biennial Contemporary Art Exhibition, which was first held in 1993.

- Al-Shaheed Park in Kuwait, inaugurated in 2015, which features two museums alongside botanical gardens. An open-air performance center was added in 2017.

Government efforts are more pronounced in the Gulf states, while creative communities in the Levant and North Africa rely on their own networks. Increasingly, however, countries in the MENA region are also embracing public-private partnerships as a means to combine the efforts of both sectors more effectively. According to a policymaker from Dubai Culture and Arts Authority, the Gulf states are experimenting with models where the government works as an enabler, regulator, and policymaker while the private sector acts as the operator. The case study on Dubai Culture illustrates what this type of partnership could potentially look like.

Dubai

Cultural consumption trends and patterns in the MENA region

Culture case study

DUBAI

The Dubai Culture and Arts Authority (Dubai Culture) was created in 2008 to promote the city's cultural scene and establish partnerships with the private sector, universities, and other non-governmental bodies in line with the objectives of the city's Vision 2021. Its initiatives span nearly every cultural theme and focus not only on showcasing cultural talent but also nurturing it.

Dubai Culture's recent activities include:

A "cultural visa" (claimed to be the world's first) of up to 10 years, which is intended to draw in talent from the rest of the Arab world and further afield.

Multi-day fairs and festivals such as the Sikka Art Fair, Al Shindagha Days and Hatta Cultural Nights.

The Al Marmoom: Film in the Desert, whose inaugural edition in March 2020 involved not only film screenings but also workshops designed in collaboration with various local universities as well as private companies (Nikon, Panasonic, and FX Makeup).

Dubai Culture also partnered with du to advance the local and regional film industry. This partnership will provide emerging filmmakers with a platform to progress their creative skills through interaction with established regional and international filmmakers.

Most recently, it launched the #CreateTogether campaign, which encourages artists to share their content digitally to make it accessible to those staying at home due to the Covid-19 pandemic.

Consumer tastes, preferences and modes of engagement in culture

Alongside government and private sector efforts to develop cultural offerings as described above, cultural development in the MENA region is being driven by the evolution of consumer's tastes and preferences. Societies in the MENA region today are wealthier, more interconnected and continue to urbanize at a rapid pace. These changes have increased the level of consumers' interest in culture, options for engagement and how consumers choose to engage.

To better understand trends in consumer preferences and patterns of engagement in culture, in 2020 and as part of this study, a survey was conducted of 5,000 cultural consumers in 10 cities across MENA. The region-wide survey uncovered several illustrative trends on the demand for culture, including consumer perspectives on the availability of cultural activities in each city and consumers' engagement with, and prioritization of, these activities.

Accordingly, the outcomes of the cultural consumer survey offers a relative assessment of the MENA cities on Availability, Engagement and Prioritization of key cultural activities, where:

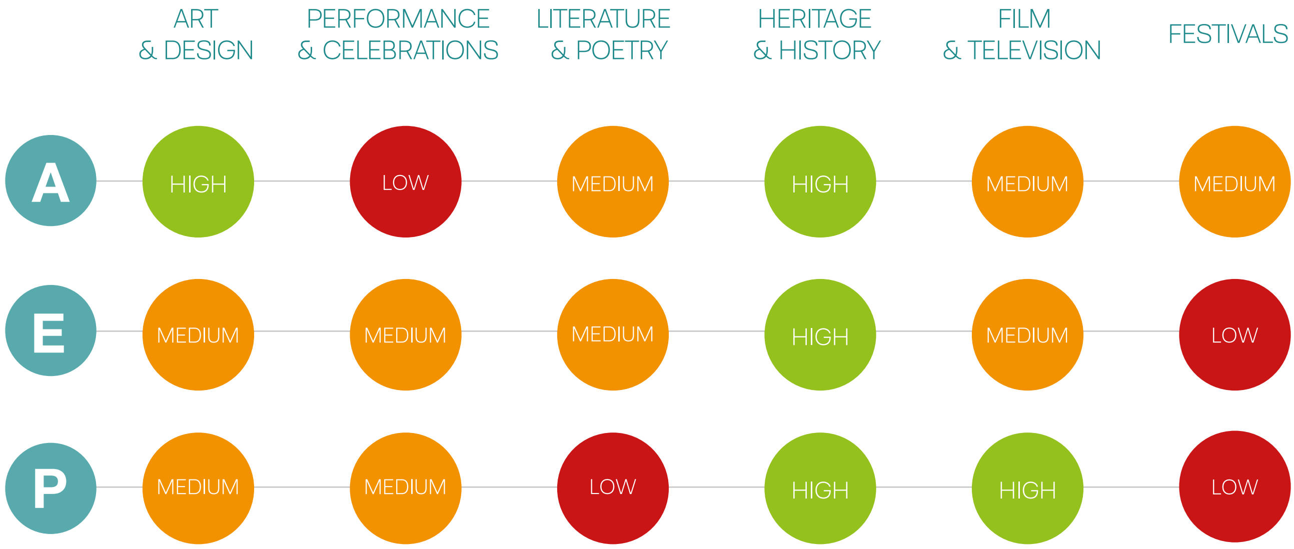
AVAILABILITY
Refers to the number of cultural sites in each city

ENGAGEMENT
Refers to the active participation in a cultural theme

PRIORITIZATION
Refers to the relative preference for a cultural theme.

One of the main findings from the survey was that consumers scored cultural offerings on Heritage and History the highest in terms of Availability, Engagement and Prioritization among the six key cultural thematic offerings. This was reflected in both the large number of available sites that consumers cited as well as their engagement with these sites in terms of physical visits or via other media, such as digital. For instance, around 44% of respondents had visited a Heritage and History site in the past 12 months. Consumers' strong interest in cultural offerings on heritage and history extends beyond an interest in local offerings, with 70% of consumers indicating a willingness to travel to visit museums, archaeological sites, or buildings of historic architectural importance. These trends indicate a strong potential for the development of tourism offerings for consumers in the MENA region that have strong Heritage and History dimensions.

Night Garden, Winter Wonderland; Riyadh



Regional cultural patterns: common passion for Heritage and History

Source: EI analysis

The importance of Heritage and History in people's appreciation of culture in the region also manifested in how much the MENA region associates it with its own cultural identity. Approximately 35% of respondents identified this theme as the most representative of their city's cultural identity.

Though Heritage and History was the most popular cultural activity across all age groups, cultural storytelling through visual media is emerging as a key area of interest among consumers. The theme most related to this, Film and Television, scores relatively well on active engagement and relative preference of cultural consumers, despite faring low on availability. This trend is particularly evident among the youth in the region, with 20% of youth wanting to visit sites related to Film and Television (which is the same as the number of youth wanting to visit sites related to Heritage and History).

This strong interest in visual storytelling among youth provides a unique opportunity for public and private sector stakeholders to broaden and enhance their cultural offerings to cater to the evolving preferences of dynamic consumers at national and global levels. The MENA region's creative youth have also been using storytelling as a means of documenting and sharing their cultural story, e.g., through film and photography. Some countries have been particularly successful in this regard, such as Lebanon, whose films have scored Oscar nominations, as well as Egypt, which has the region's largest film industry and a well-established local cinema culture. In the Gulf, the Arabic tradition of folkloric storytelling known as *Hakawati* has also enjoyed a revival in recent years, particularly in the UAE. Overall, consumers' cultural participation is on the rise and promises to increase further.

Cultural participation in the MENA region is approaching levels seen in countries with established cultural and creative industries. For example, in the UK, 39% of the "culturally active" population visit sites more than twice a year; in MENA region, the figure is 32%.

However, whereas participation in established markets remains relatively static, the appetite for increasing cultural engagement was evident across the MENA region. With the exception of respondents in Muscat and Beirut, nearly 50% of the consumers surveyed indicated that they intended to engage more cultural activities over the next year. This trend was consistent across gender and age, with 47% of female respondents and 49% of male respondents expecting to visit cultural sites more in the upcoming year. Respondents across all age groups expected to engage more in the future (with percentages ranging from 47- 50%). This consistency shows that culture is not just the reserve of youth, or a specific gender, but rather is a vital component of cultural identity whether young or old, male or female.

Cultural growth in the MENA region is driven by a highly engaged population finding new forms of participation in existing infrastructure. Across all age groups and genders interest in culture is high. Over 90% of respondents agreed with

Consumer interest in cultural activities on Heritage and History

44%

of the survey respondents had visited a Heritage and History site in the last 12 months.

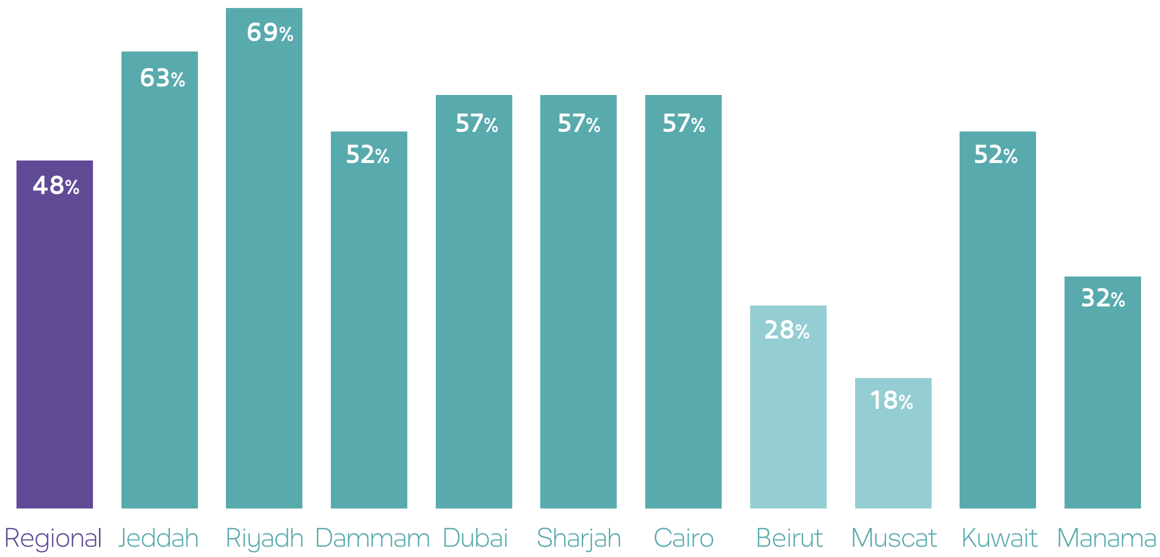
70%

of those asked about their willingness to travel to visit cultural sites would be happy to do so in order to engage in this theme.

35%

of respondents identified this theme as the most representative of their city's cultural identity.

Percentage of people who felt they would visit cultural sites more in the next 12 months



Engagement on the rise:

Cultural participation in the MENA region is set to increase in the next year

Source: EI analysis

the statement "cultural participation is important to them" and over 75% of respondents saw cultural participation as more important to them than comparable entertainment options, such as watching or playing sports. Over 80% of respondents felt cultural activities in their city had improved in the last year. This was driven more by improvements in existing offerings than by new sites. Over 41% of people who felt that availability had improved cited improved sites as the key reason.

Factors driving this willingness to participate were also encouraging. A leading reason expressed by over a quarter of participants was the desire to learn more from the visit, signaling the richness of the experience that the cultural sites have on offer. Another key motivation expressed by 15% of respondents was interest generated among participants' friends and family around the cultural site. This is underscored by similar insights from regional experts, suggesting demand for experiences that families can participate in.

Consumer income level is a key determinant of future engagement in culture. Some 65% of high-income respondents expected to visit more in the upcoming year, compared to 47% of low-income consumers. This trend was more pronounced for Saudi Arabian cities where high-income respondents were the primary contributors to future engagement. Over 75% of high-income respondents across Saudi Arabian cities expected to visit more, compared to approximately 50% of low-income consumers. A reverse trend was observed for Dubai and Cairo, where 56% of high-income respondents expected to visit more, compared to 60% of low-income respondents.

The growth of cultural participation across all age segments highlights how culture is being used by consumers as a medium to explore their cultural identity. It is crucial to build on this further, as was echoed by the experts from the region.

Consumer views on the importance of cultural participation

90%

of respondents agreed with the statement "cultural participation is important to them."

75%

of respondents saw cultural participation as more important to them than comparable entertainment options.

80%

of respondents felt cultural activities in their city had improved in the last year.

"A number of cultural activities taking place in Saudi Arabia are participated by all age groups (e.g., the Earth Spring Festival). People look forward to activities that are relevant for the younger as well as older generations and which they can participate in with their families."

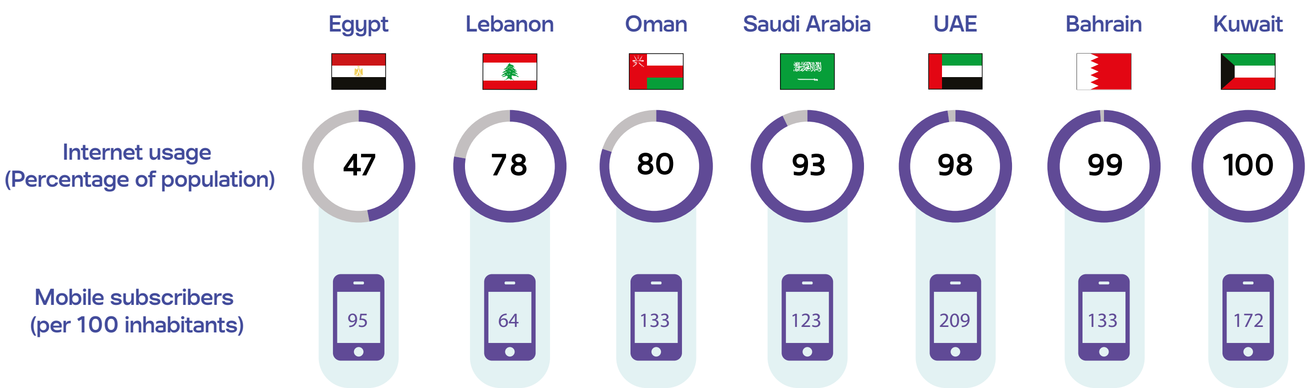
Dr Mark Thompson,
a Riyadh-based academic

National Museum of Egyptian Civilization; Cairo

"Social media is one of the main drivers that has led to greater cultural consumption. Entities that develop cultural content don't have big budgets, so social media comes in as a very cost-friendly tool to promote their activities."

Wakim Zeidan, General Director, Nuqat; Kuwait

The expansion of cultural offerings on digital platforms and the proliferation of digital technology use among consumers is also driving cultural participation. The use of digital platforms has benefited from high rates of technological adoption in the region. For example, Internet usage is above 90% in most Gulf states (as of 2017). Across the MENA region, a similar trend can be seen, with only Egypt having less than half of its population connected. Correspondingly, mobile phone penetration is also high in the region, with Gulf residents on average owning more than one mobile phone per capita. These measures underscore the wide adoption of social media in the MENA region, which is among the highest in the world. Popular platforms include YouTube, Facebook and WhatsApp as well as the more artist-friendly Instagram, which according to one regional study has an adoption rate of 42% among the region's internet users.



Digital influence:

High penetration of internet and mobile phones driving cultural growth in the MENA region

In most MENA cities, internet usage is above 80% and there is more than one mobile phone per person.

Source: World Bank, EI analysis

Approximately 36% of consumers indicated that institutions' social media pages were a key source for remaining informed on cultural activities and events.

The trend was evident from the survey results with over 80% of respondents willing to participate in culture using digital media. Income was a key driver for digital engagement. Approximatively 78% of high-income consumers were willing to participate digitally, compared to only 65% of low-income consumers, which may be linked to relatively higher awareness as well as access to digital platforms among high-income consumers.

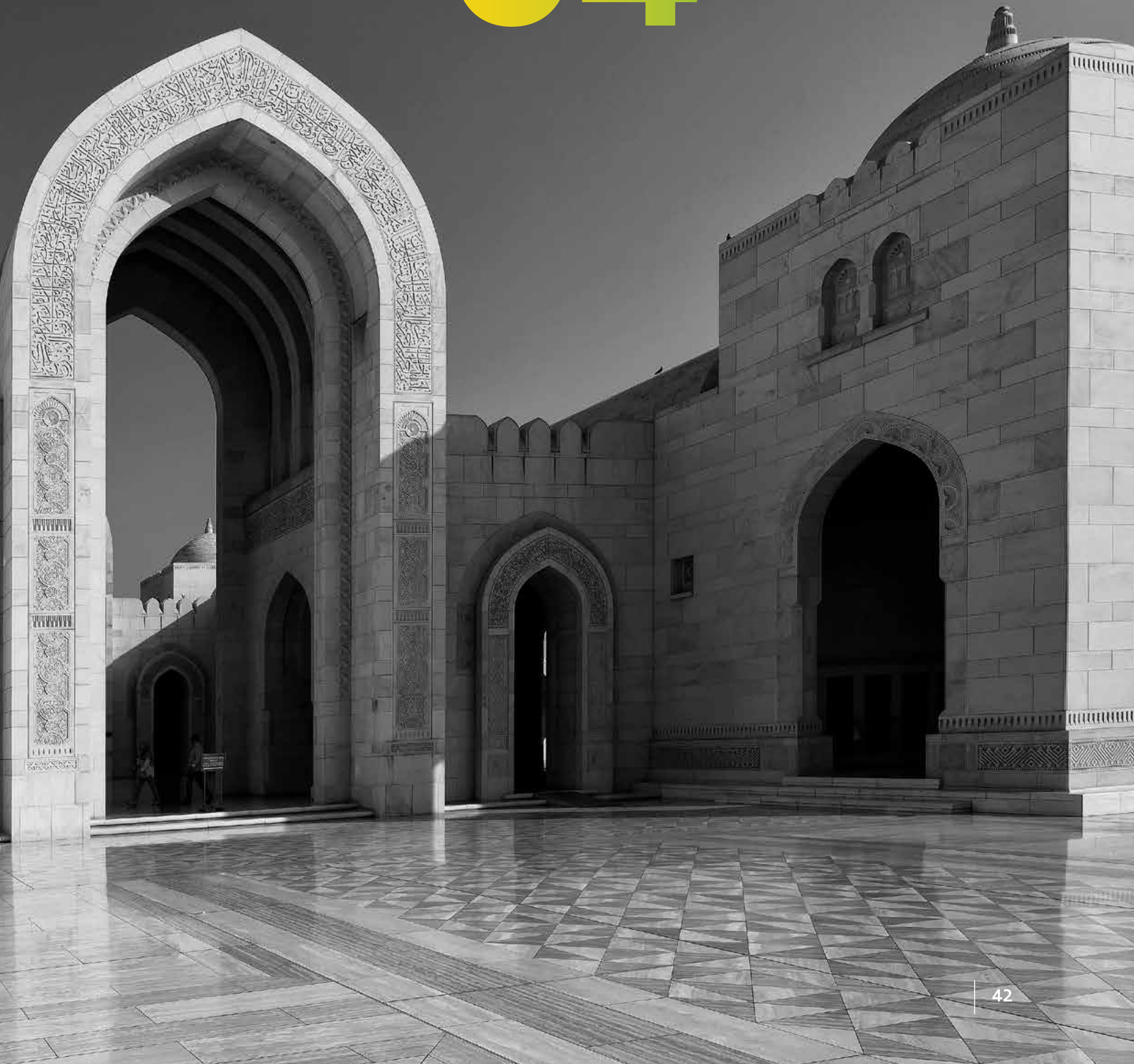
Social media also emerged as an important means for cultural consumers to keep in touch with cultural institutions on a more regular basis. Approximately 36% of regional participants selected institutions' social media pages as their key source for remaining informed on their cultural activities and events. This is well over double that of traditional sources, such as physical advertising or television. Regardless of the way in which these institutions reach cultural consumers, potentially the greatest benefit of the digitalization of culture is that it reaches the widest possible audience, which in turn further stimulates the region's creative talent.

Another key trend that emerged from the consumer survey was the apparent positive correlation between the availability of cultural offerings and the level of consumer engagement. In other words, a greater availability of culture, such as the accessibility of various sites, sets a foundation for greater cultural engagement. On the ground, however, this trend varies from city to city, with each telling its own story. Cairo's metrics for cultural availability, for example, exceeded its participants' engagement levels. According to a multidisciplinary artist, historian and educator based in Cairo, a lack of proper infrastructure and limited focus on promoting culture potentially explains this, as the aforementioned issues are likely barriers to engagement.

To shine a light on these trends at a city level, the following section dives into each city's trends and insights. These profiles highlight the relative levels and dynamics of cultural participation in each city across the key cultural themes, identifies growth drivers for participation as well as critical barriers cities are facing in their cultural development journey.

Profiling Cultural Consumption in 10 MENA Cities

04



A culture map of MENA cities

The region-wide survey revealed several trends and patterns around cultural consumption on a city and demographic level. While the previous section focused on regional patterns of note, this section identifies what makes each MENA city's cultural consumer unique. This is done through data-driven insights on how consumers are engaging with their city's available cultural offerings and identifying the key drivers and barriers to cultural participation in each city.

Some cities have long-established and renowned cultural scenes, e.g., Beirut and Cairo. Others have been gradually nurturing their cultural talent and infrastructure to achieve regional and global recognition, e.g., Dubai. Regardless of where each city sits on this spectrum, all are currently attempting to capitalize on culture as a springboard for further economic development. Numerous cultural hot-spots are being showcased as a result, with municipal authorities making the most out of their existing advantages despite specific challenges.

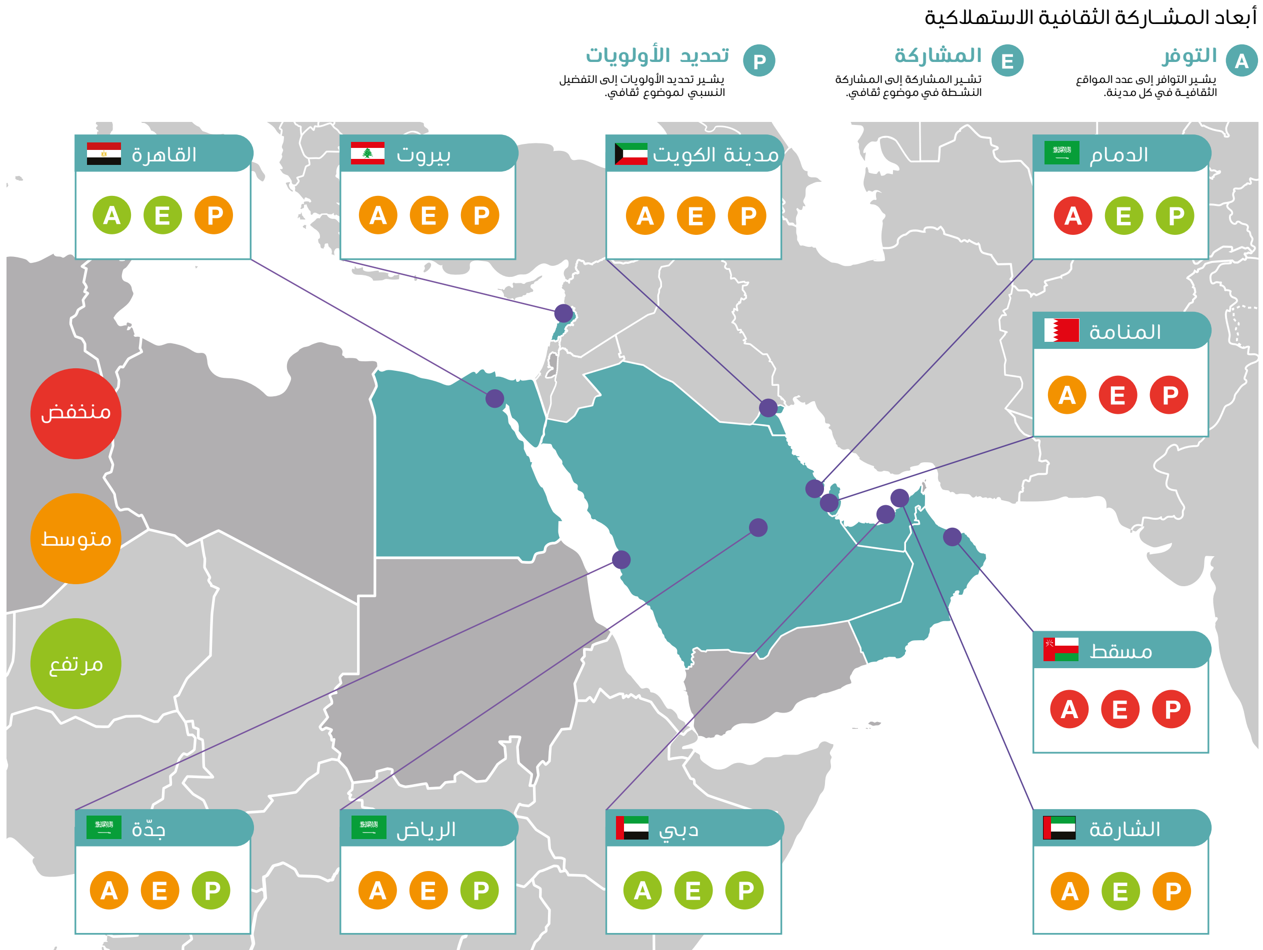
The graphic on the next page uses results from the survey to compare various cultural consumption metrics on a city level. The High-Medium-Low ratings are based on a relative scoring assessment of the MENA cities on Availability, Engagement and Prioritization of key cultural activities.

City level findings
Relative assessment of key cultural activities in MENA cities

The results summarized in the graphic are elaborated on in each of the city profiles that follow. Along with an explanation of the ratings across the three metrics (Availability, Engagement and Prioritization), the city profiles highlight key trends across cities: city-specific "hot-spots" for culture consumption, frequently visited sites, barriers to engagement and a view on the future of culture in the city based on emerging trends.

Cultural activity wise relative assessment is presented in Appendix 2.

Source: EI analysis



City Profile

Cairo, Egypt

A E P

Country GDP

$303.1 billion

City population

20 million

Cultural reputation

High

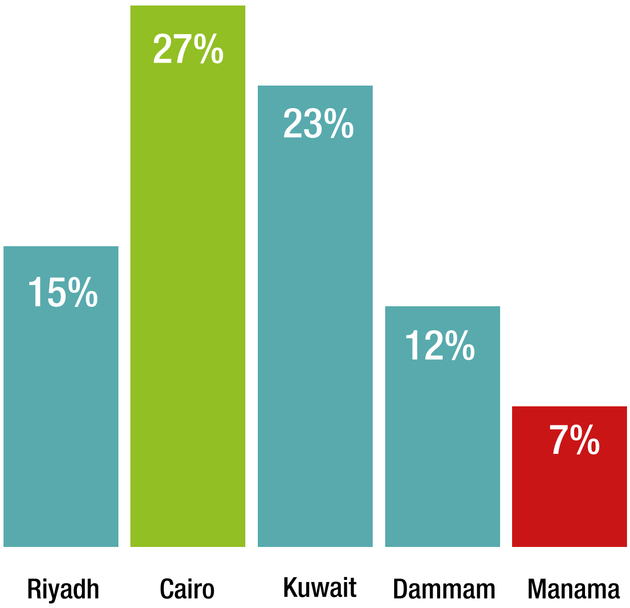
As one of the most well-known global cultural tourism destinations, Cairo's cultural consumers scored it higher on all three metrics than most other cities in the survey, across most themes. According to local and international artists and academics, Cairo is the music and cinema capital of the region, underscored by the fact that it hosts the most prolific cinema industry in the MENA region.

Survey Insights

With a history that spans thousands of years and arguably one of the most well-known historical sites globally (Pyramids of Giza), 43% of consumers selected Cairo as a regional hot-spot for cultural activities in Heritage and History. Cairo also had the second highest number of respondents who chose a Museum or historical site as their most frequently visited cultural venue (29%). The presence of well-known sites such as the Egyptian Museum, the Museum of Islamic Art and the Coptic Museum, underscore this trend.

Cairo's reputation as a cinematic capital was also reflected in high responsiveness towards Film and Television being selected as a cultural hot-spot (27%), with sites relating to this theme, such as cinemas, being the second most visited after sites relating to Heritage and History, such as museums (24%), which is higher than any other city in the survey. The city's most well-known Film and Television event is the Cairo International Film Festival, held since 1976, which showcases a diverse range of local, Arab and international films.

Art and Design, as a theme, scored highly on Availability, but lower in terms of actual participation (frequently visited only by 10% of participants). According to a Cairo-based contemporary artist, this may be due to the high level of commercialization of art in Cairo, which has created a crowd-out effect for certain clientele. This, in turn, limited the perceived accessibility of the theme to a wider population.



Hot-spot for Film and Television

Proportion of respondents who saw their city as a Film and Television hot-spot

1/3

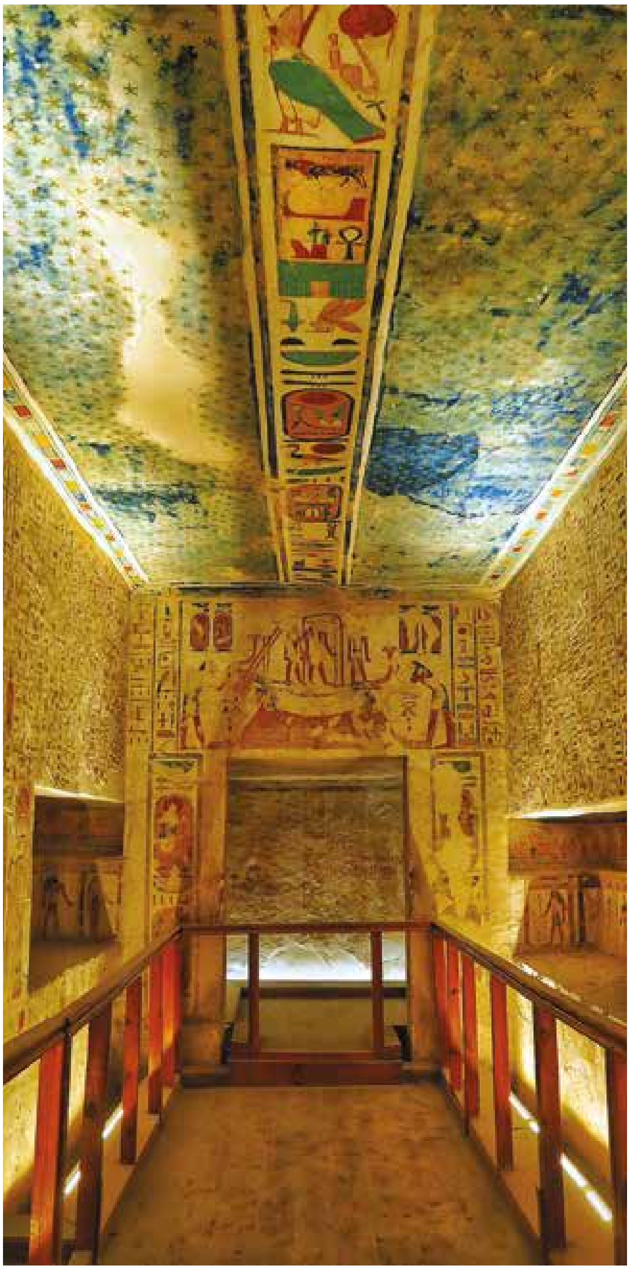
of respondents in Cairo said they would engage more with culture if their friends and families did too. This presents an opportunity for cultural stakeholders to design more intimate cultural activities, which could be extensions of people's regular social interactions.

Future Outlook

Looking to the future, Cairo's residents appeared enthusiastic about increased engagement in cultural activities, with 57% reporting that they would be likely to visit cultural sites more frequently in the next 12 months. This presents a unique opportunity for cultural providers to expand their marketing efforts while also enhancing the availability and range of their offerings to accommodate a potential increase in consumer demand.

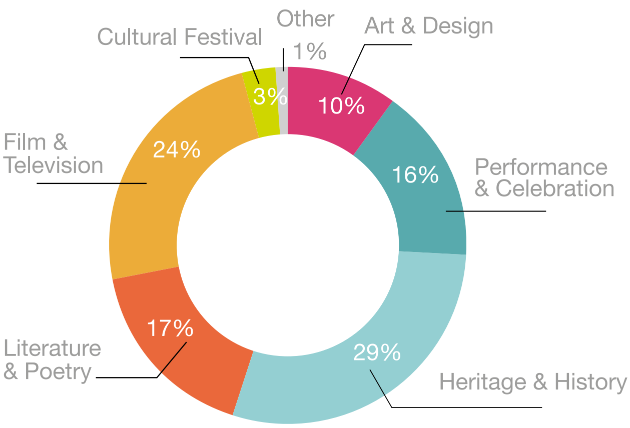
Improving information flows and the segmentation of offerings for consumers is particularly important in Cairo where a higher number of low-income consumers (60%) indicated that they would likely engage more in cultural activities over the next 12 months than high-income consumers (56%).

Due to its strong positioning in heritage and history, Cairo regularly attracts the attention of commercial sponsors of culture in the region, which can be leveraged to expand the types and levels of cultural offerings. According to Thomas Girst, Global Head of Cultural Engagement at BMW, "we have been partnering with Art D'Égypte, which is now in its third year and when we [BMW] put our weight behind such events, it helps those on the ground to generate more budget from other companies. Wherever it makes sense for us strategically and budget-wise, we are keen to associate ourselves with reputed cultural institutions in the region." This highlights the critical role players in the private sector have as supporters of local cultural industries. In the longer term, Cairo's authorities can capitalize on this positive private sector interest by working towards improving the enabling environment for cultural development with a strong focus on enhancing political and economic stability.



Barriers to Engagement

Some of the barriers to engagement reflect Cairo residents' potential limitations in terms of urbanization and limited infrastructure. By far the most populated city covered in the survey, at over 20 million people, it was not surprising to see that congestion emerged as an issue, with the city exhibiting high travel times to a cultural site. Specifically, only 20% of respondents spent less than 30 minutes traveling to a site, which was the lowest proportion across the surveyed cities. Additional reported barriers included a lack of infrastructure and facilities catering to tourists.



Most visited themes

Source: EI analysis

City Profile

Beirut, Lebanon

A E P

Country GDP

$52 billion

City population:

2.4 million

Cultural reputation

High

Similar to Cairo, Beirut benefits from having one of the region's most recognized cultural scenes, a product of Lebanon's multi-religious history and its position as an intersection between Middle Eastern and Mediterranean cultures. Aside from Heritage and History, Beirut performs relatively well in Art and Design, as well as Literature and Poetry across all three metrics.

Survey Insights

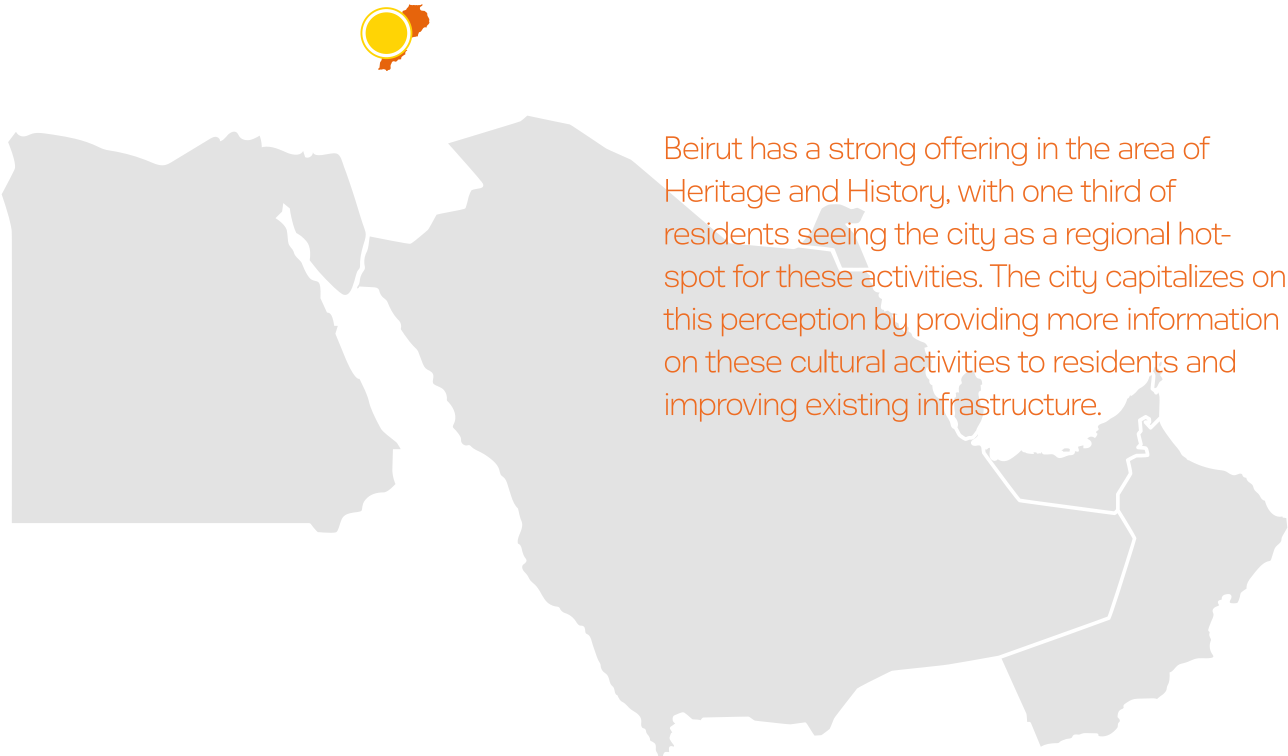
Beirut scores highly in terms of the availability of cultural activities in Performance and Celebration. The city is home to a wide variety of performing arts theaters, including the renowned Caracalla Dance Theater, professional dance theatre of the Middle East, and the Metro Al Madina, which offers popular cabaret shows. Compared to other cities in the study, respondents in Beirut expressed the strongest interest in visiting theaters and other performance sites in the future. Although only 12% of respondents listed these types of sites as their most visited, 20% expressed a desire to visit these sites in the future. Further interest in these areas could be expanded with improved marketing to consumers and enhanced digital offerings.

Another area where Beirut scored highly was as a hot-spot for Literature and Poetry (25%), the second highest score in the survey. This was possibly driven by the rise in literature-related events over the past decade, starting with the Beirut Festival in 2009, the same year the city was chosen as the UNESCO World Book Capital.

Overall, sites that fall under Heritage and History were the most visited (by 28% respondents), followed by Literature and Poetry as well as Film and Television events (20%). Beirut's survey participants also showed some of the highest rates of travel abroad, with 12% of their last cultural visits being outside of the country.

"Art is very vibrant in Beirut and the city continues to be a hub, mostly because of the open and avant-gardist culture. Beirut has also been very influential in introducing collectives that think about art, forums to discuss themes in art, and spaces to train, experiment and explore with different art practices."

Lyne Sneige, Director of the Arts and Culture Program at the Middle East Institute



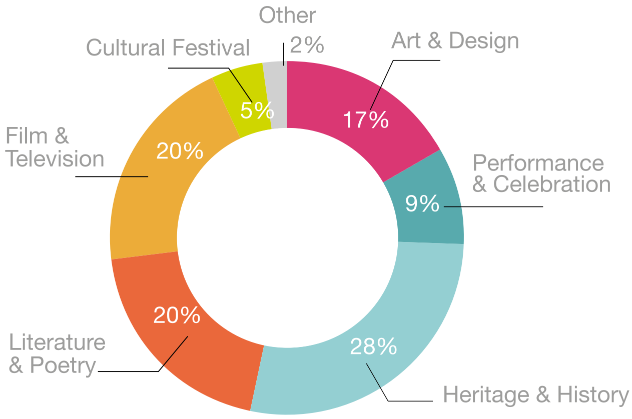
Beirut has a strong offering in the area of Heritage and History, with one third of residents seeing the city as a regional hot-spot for these activities. The city capitalizes on this perception by providing more information on these cultural activities to residents and improving existing infrastructure.

Future Outlook

Ultimately, Beirut appears to be a city of contrasts, one which despite having no shortage of cultural attractions and avant-garde hot-spots, still has to face constant political instability and lack of public funding. Artists from the region say that Beirut has produced exceptional work despite a lengthy civil war, and local confidence in the city's cultural sector speaks volumes to this. According to Saleh Barakat, a Lebanese art gallery owner, "the private sector in Lebanon is one of the most independent in the whole art world but we need more cultural institutions, more museums and more public institutions that promote art so that a more private cultural scene can develop in parallel. Private initiatives cannot thrive without institutional vision, which comes from public support." If regional tensions and current crises subside, the city will be in a much better position to revive its cultural landscape. However, this will largely depend on whether authorities will be willing and able to commit to financing cultural development, particularly at the outset of a potentially critical financial crisis and a stagnating economy.

Barriers to Engagement

The biggest barrier to engagement that emerged from the survey was the relatively low levels of satisfaction and interest in the city's cultural offerings. This was evidenced by only 28% of respondents expressing a willingness to participate more in culture in the next year, the second lowest in the region. Furthermore, 23% of participants said they would reduce their number of visits to cultural sites, the highest regional result from that perspective. Of respondents who felt they would visit less, a lack of time was cited as the main reason (39%), with reduced income also a key factor (23%), which is likely to be driven by the current fiscal crisis the country is facing. Continuing the trend of limited willingness to participate in culture, non-site visits (digital media, etc.) fared little better, with just 43% of non-site participants expecting to engage more in the next year, one of the lowest levels for this metric in the survey.



Most visited themes

Source: EI analysis

City Profile

Dubai, UAE

A E P

Country GDP

$421 billion

City population

3.4 million

Cultural reputation

High

Dubai has been one of the most successful examples of top-down cultural development and now offers one of the most diverse cultural landscapes in the region. Tellingly, it scores relatively well on all themes across all three metrics, with relatively higher Engagement scores than any other city, demonstrating a balanced approach to the cultural sector's development.

Survey Insights

In line with its image as a metropolitan hub and a center for regional business, Dubai is notable for having the highest rate of respondents who have participated in cultural activities in digital format. Around 80% of respondents in Dubai participated in cultural activities through digital platforms, 5% more than in Riyadh, which has the second highest level of digital participation in the region. This reflects the high levels of Internet penetration in the UAE (99.2%) and suggest strong investments in digital transformation in Dubai's cultural industry.

In terms of the availability of cultural offerings, respondents rated the city highly on the availability of cultural activities in Arts and Design and Performance and Celebration. The city is home to modern and traditional art galleries and performance centers such as the Ayyan Gallery, Madinat Theater to the Dubai Opera. When it comes to physical site visits, like elsewhere in the region, Heritage and History sites were the most visited (29%) followed by sites on Film and Television (25%). Notably, 97% of respondents who had visited a cultural site in Dubai indicated that the visit met their expectations. This suggests that the city offers cultural offerings that are highly tailored to consumer taste and demands.

"We leverage our history for residents and tourists to understand our roots, the story of our country and the identity we stand for. A lot has been done on this front. Dubai's Al Shindagha Cultural District has been converted into an open museum; Etihad Museum is a platform for the younger generation to learn more about the history of our nation with a series of inspiring programs including interactive workshops that serve as a reminder of the active role museums play in society; and exhibitions which fulfill the mandate of making the city a center for cultural and educational exchange."

Hala Badri, Director General, Dubai Culture and Arts Authority (Dubai Culture)

30%

of people in Dubai feel new events will mean they will participate more in culture next year. These findings suggest that city authorities and other stakeholders might need to work more on balancing long-standing cultural offerings with frequent and new short-term offerings that will keep consumers engaged.

Future Outlook

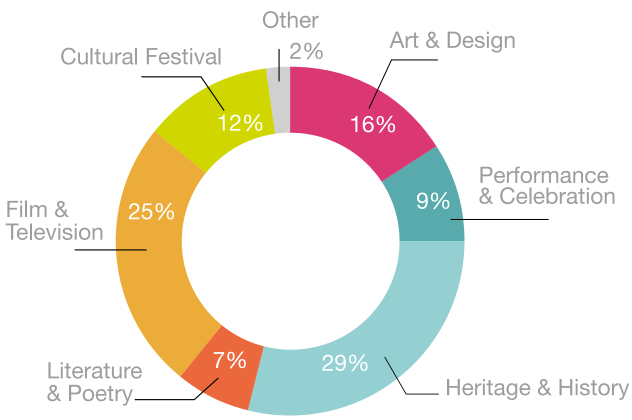
Looking to the future, overall expectations of greater cultural participation were well above average (57% compared to the MENA average of 48%) and this carried over to non-site participation as well (74% compared to 67%). This is reflective of the importance that local authorities have assigned to cultural development. An active and well-supported cultural authority (Dubai Culture) is helping link public, private and community efforts to make the city a regional cultural hub.

Barriers to Engagement

Despite strong engagement levels, a consistent barrier to engagement emerged among Dubai's respondents – time. Among those who felt they would visit fewer sites next year, lack of time was the number one reason cited for decreasing visits (38%).

Equally telling, having more time was cited as a key determinant for increased participation in cultural engagement among those who felt they would participate more (32%).

This is likely reflective of the city's fast pace of life and work culture; according to a recent Bloomberg article, UAE professionals work more hours in a given month than any other city globally. In terms of satisfaction, the survey showed interesting results, namely that a large proportion of unsatisfied visitors complained about the condition of the site (15%) as the main reason for their lack of satisfaction, highest across the survey cities, despite Dubai's high standards for its facilities.



Most visited themes

Source: EI analysis

City Profile

Sharjah, UAE

A E P

Country GDP

$421 billion

City population

1.3 million

Cultural reputation

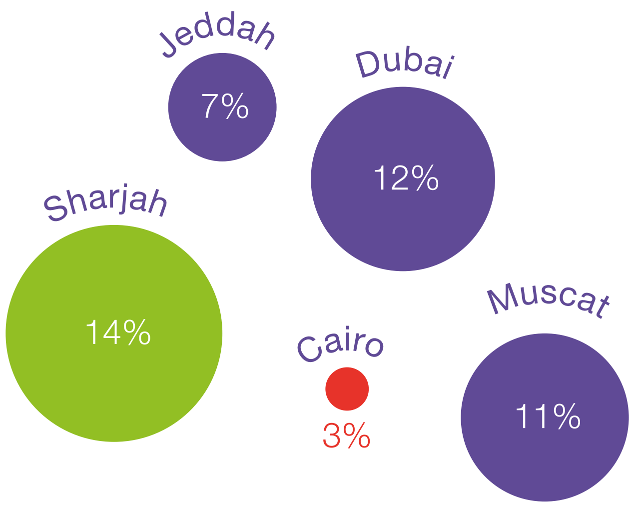
Medium

Sharjah has now firmly established itself as another of the UAE's cultural cities, endowed with a rich history and architecture as well as a lively art and literary scene. With very few low scores on Availability, Engagement as well as Prioritization, Sharjah performs relatively well across most themes, specifically Cultural Festivals. When it comes to Cultural Festivals, its vibrant scene of year-round festivals and cross-cultural events (e.g., Sharjah Biennial and International Book Fair, among others) contextualizes why Sharjah scores highly on all metrics for this theme.

Survey Insights

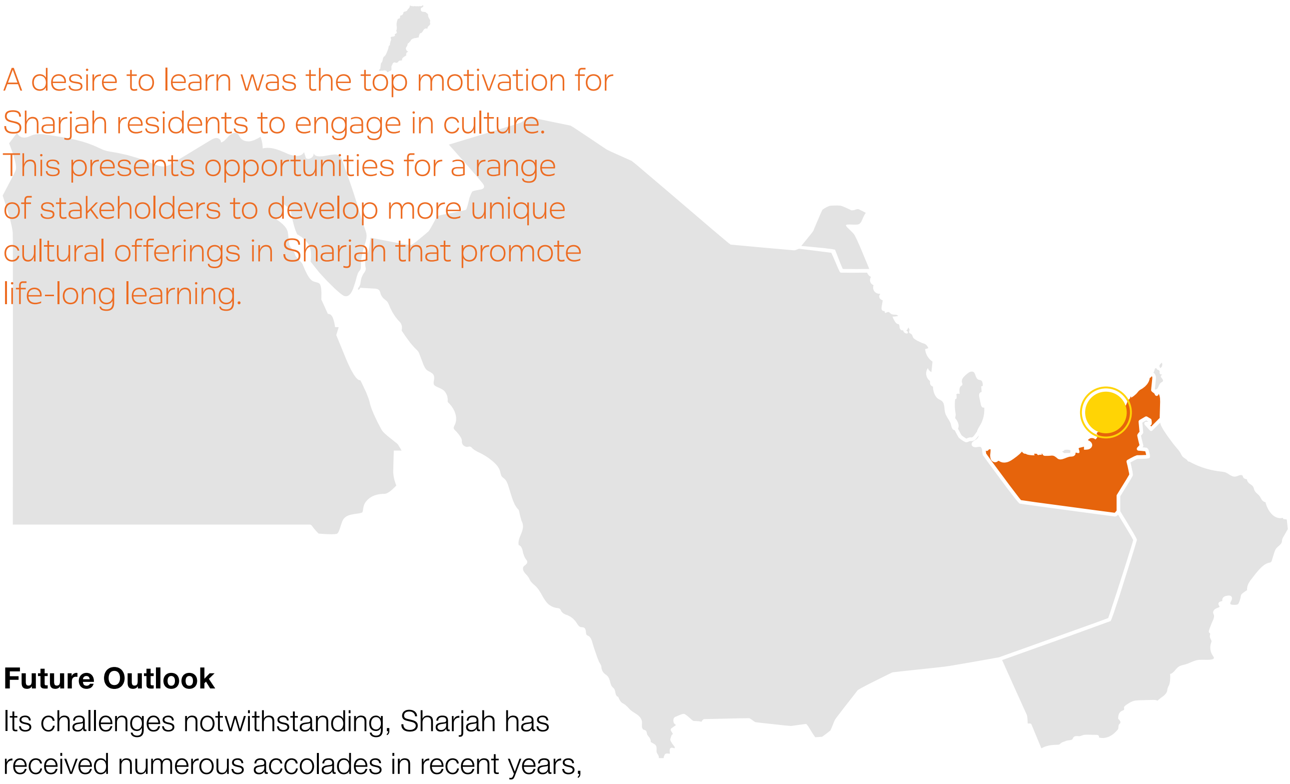
Sharjah respondents felt strongly that Heritage and History was the city's defining theme (43%), although respondents showed a relatively even distribution of the sites they visited most in the recent past. Heritage and History sites, such as museums were the most frequently visited (24%), closely followed by Art and Design sites, such as galleries and architectural sites (20%), among others. The latter certainly speaks to the city's secondary identity as one of the region's art capitals. The Art and Design scene is dominated by the Sharjah Biennial, which is one of the largest exhibitions of contemporary art in the Arab world. The March Meeting, an annual convention of artists, curators, and art practitioners (the 2020 edition was postponed due to Covid-19), is another example. According to Olivia Sand, author of *Contemporary Voices From The Asian And Islamic Art Worlds,* "In terms of biennials within the region, the Sharjah Art Biennial is one of the strongest cultural events for contemporary art. It started in 1993, with the goal to establish itself as a solid, permanent and growing event in the area."

In terms of future engagement, Heritage and History consistently appeared as the theme of greatest interest, and in this sense the city will benefit from the strong commitment of local authorities to historical preservation. A Directorate of Heritage has been active since 1993 and has made efforts to restore some of the city's traditional architecture and historic quarters. Cultural Festivals also showed good interest, where Sharjah had the highest percentage of respondents in the region expecting to visit a festival in next 12 months (35%).



Popularity of Cultural Festivals highest across survey cities

*Proportion of respondents who chose festivals as most visited site



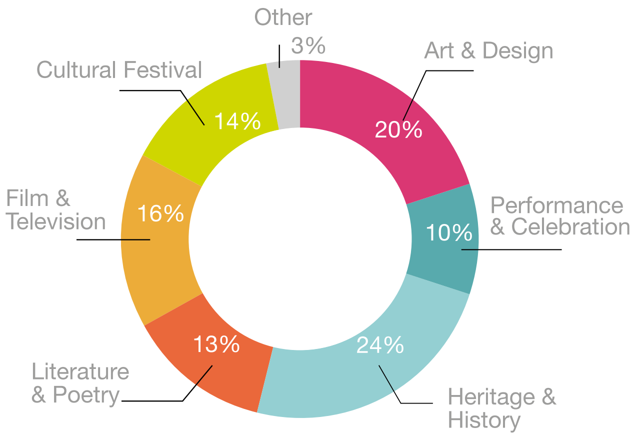
A desire to learn was the top motivation for Sharjah residents to engage in culture. This presents opportunities for a range of stakeholders to develop more unique cultural offerings in Sharjah that promote life-long learning.

Future Outlook

Its challenges notwithstanding, Sharjah has received numerous accolades in recent years, including Capital of Arab Culture (1998), Capital of Islamic Culture (2014), Capital of Arab Tourism (2015), and most recently, UNESCO World Book Capital (2019) thanks to its hosting of the Sharjah International Book Fair as well as Sharjah Children's Reading Festival. However, additional investments in building cultural infrastructure and more permanent cultural sites could help boost engagement further, as was suggested by a regional academic source that was interviewed.

Barriers to Engagement

In terms of barriers, despite the country's relatively high income levels compared to other cities in the region, spending at cultural sites is low - half of respondents spent less than US$10 on their last visit. This is reflected in the fact that 92% of respondents felt their last cultural trip was value for money. One of the potential reasons for this, as highlighted by an advisor to the Art Jameel Foundation, is that the cost of living in the country is rising more rapidly than increases in salaries, and therefore discretionary income that would be dedicated to arts and culture is in decline. Time was also cited as a likely reason for visiting sites less; 46% of those who expected to visit less cited this reason as the main driver.



Popularity of Cultural Festivals highest across survey cities

*Proportion of respondents who chose festivals as most visited site

Source: EI analysis

City Profile

Kuwait City, Kuwait

A E P

Country GDP:

$134.6 billion

City population

3 million

Cultural reputation

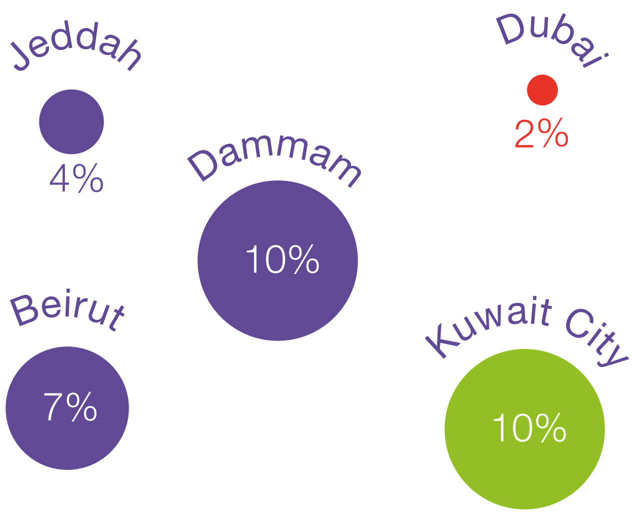
Medium-high

Kuwait City scored well across all three metrics on Heritage and History as well as on Film and Television, maintaining a common regional trend of these being two of the most popular cultural themes. While Performance and Celebration did not emerge as a key theme for the city, it is worth noting that, according to experts interviewed for this study, Kuwait was the first Gulf country to begin using theater as a public platform for social commentary on important topics. However, this platform has not developed significantly in recent years due to stagnation of public funding. Kuwait still supports theatrical productions through the National Council for Culture, Arts and Letters, but experts reported significantly smaller operating budgets.

Survey Insights

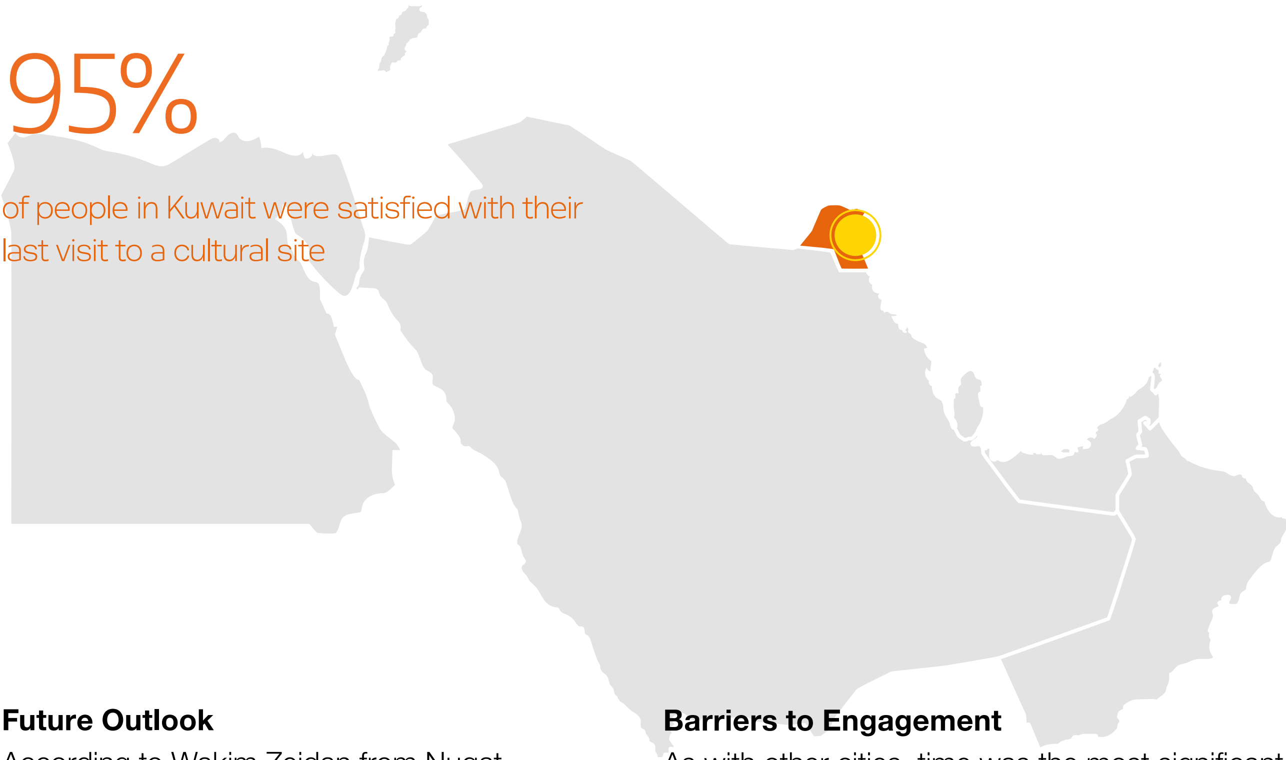
Compared to respondents in other cities in the study, respondents in Kuwait City were the most interested in engaging in cultural activities around Literature and Poetry, with 17% of respondents showing an interest in this area and 18% listing it as their most visited site. Despite the relatively higher level of regional engagement in Literature and Poetry activities in Kuwait City, most respondents reported visiting Film and Television related cultural sites more than any other site (30%) followed closely by Heritage and History sites (25%). According to a Kuwaiti-born visual artist, cinemas are working to support this interest in cultural offerings in Film and Television by showcasing a balanced mix of Hollywood movies and regional movies, primarily from Egypt and Lebanon. A number of opportunities therefore might exist for further development of regional or local cultural offerings in Film and Television as well as Literature and Poetry.

One of the key trends among Kuwait City respondents was that despite having one of the shortest travel times to culture sites (48% of respondents traveled less than 30 minutes), there was significant interest in visiting cultural sites outside of the city. Specifically, 42% of respondents chose sites in other Kuwaiti cities, while 10% highlighted that their last cultural visit was outside of Kuwait but in the MENA region (the highest in the survey, tied with Dammam) – suggesting that Kuwaiti cultural consumers could be targeted by MENA cultural institutions seeking to attract regional visitors. Although digital engagement among non-site participants was not particularly high (64%), a significant percentage of digital engagement was devoted to audio (30%) a metric that stands out in the region.



Kuwaitis most likely to travel within the MENA region for culture

*Proportion of respondents traveling outside their country but within the MENA region



95%

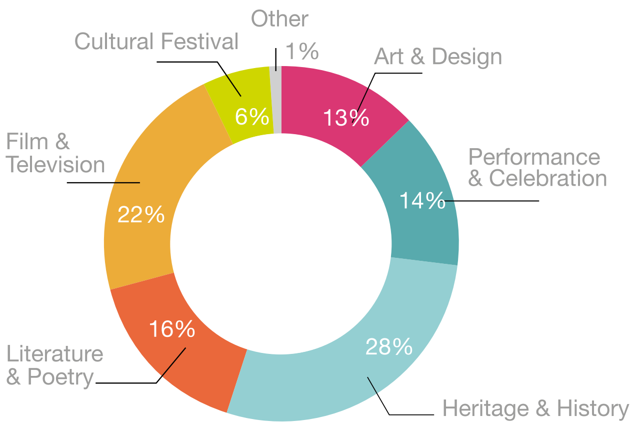
of people in Kuwait were satisfied with their last visit to a cultural site

Future Outlook

According to Wakim Zeidan from Nuqat, an organization working to promote cultural knowledge exchange in Kuwait, "there were no publicly-sponsored activities happening on the cultural front, so Kuwaitis began to organize their own activities. That is how the cultural sector began to grow. This was partially influenced by cultural developments happening across the MENA region causing a chain reaction with people increasing their cultural consumption. Eventually, the government began to follow suit." In recent times, there has been a tendency towards top-down development in the city, particularly as part of recovery efforts after the 1990-91 Gulf War. This is best represented by the Sheikh Abdullah Al Salem Cultural Center (opened in 2018), a sprawling 18-hectare museum complex that is the world's largest in size and part of the $1 billion Kuwait National Cultural District. The complex also boasts the Kuwait National Opera, the largest opera house in the Middle East, as well as Al Shaheed Park, which includes exhibition areas and performance centers. While funding is often allocated to large-scale projects, a vision to incorporate local creative communities, as is being done successfully in other regional cities, may help further nurture a more vibrant local creative class.

Barriers to Engagement

As with other cities, time was the most significant constraint for future engagement for nearly half of respondents, with 46% likely to visit sites less in the next year. A lack of information on advertised events and exhibitions (24%) and limited information on ways to engage in cultural events (42%) were also identified as major factors constraining future engagement by this group. This informational barrier is significant and critical to note, particularly for event organizers and public authorities.



Most visited themes

Source: EI analysis

City Profile

Muscat, Oman

A E P

Country GDP

$76.3 billion

City population:

1.59 million

Cultural reputation

Medium-low

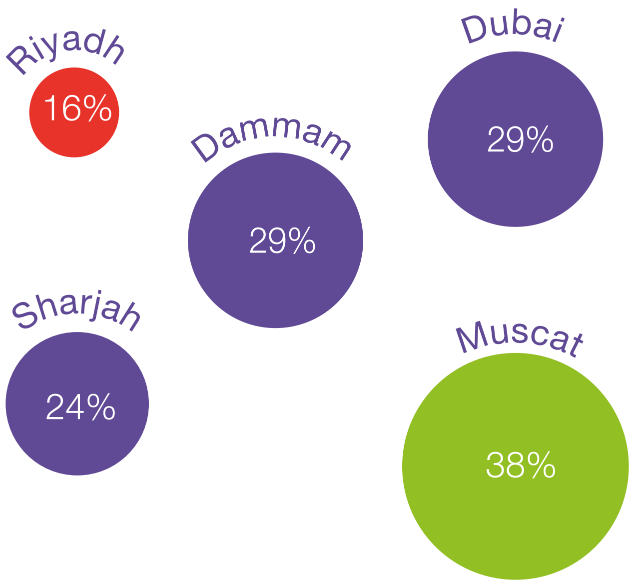
Muscat generally scored relatively lower than other regional cities on all three overarching metrics. Despite this, the city performs relatively well on the three metrics on Heritage and History and Film and Television, but faces significant challenges on some of the other themes. However, this does not take away from the city's recent efforts to promote its local culture relative to other cities in the Gulf. According to Ibrahim Gailani, a Muscat-based artist and a member of the Omani Society for Fine Arts, "the city has good potential for Heritage and History tourism, as many villages and sites are being preserved. Even the annual Muscat Festival showcases our heritage by recreating village life."

Survey Insights

Muscat departed from regional consumer patterns by highlighting Film and Television as the most visited site for cultural activities, with 40% of respondents citing this. These statistics are in line with consumer interest in cultural sites. The second highest proportion of respondents (22%) in Muscat expressed an interest in visiting Film and Television sites for culture in the future, although the highest percentage indicated an interest in cultural activities in Art and Design (24%). Across these areas, however, Muscat scores quite low in terms of the availability of cultural offerings, thus indicating key areas for future development.

According to a Muscat-based contemporary artist, Performance and Celebration in Muscat is gaining popularity and increasingly being used to highlight important social issues. The city's most famous theatrical site, the Royal Opera House, was the region's first grand opera house and has hosted prominent opera performances from artists around the world. It has also served as a space for local and regional musicians to perform.

Cultural Festivals are also an important aspect of cultural participation in Muscat, with 21% of respondents citing it as the second-most resonant cultural identifier for the city. This may be influenced by the Muscat Festival, a popular month-long event, which showcases local and regional folklore, music, cuisine as well as entertainment attractions.



Popularity of Heritage and History highest across survey cities

*Proportion of respondents who chose Heritage and History as most visited theme

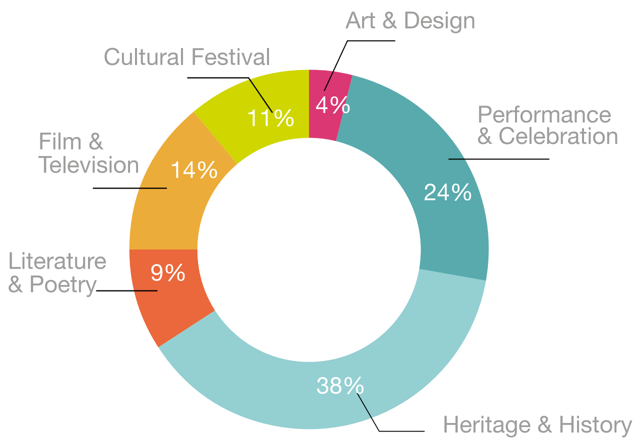
Enhancing investments in the provision of cultural information through social medial channels stands out as a promising way to encourage participation in Muscat. Currently, 45% of respondents reported keeping in touch with cultural sited through social media platforms.

Future Outlook

Despite less than favorable metrics for cultural engagement, Muscat's cultural development remained steadfast, focused on nurturing local artists and developing its traditional heritage. Tellingly, most of its recently built cultural sites, like the Royal Opera House and National Museum, have been built in traditional Islamic architectural styles. Similar to other Gulf cities, Muscat relies on the patronage of its ruling family and public financing for these efforts. Its local community, however, should be viewed as a potent source of bottom-up development. For example, although Muscat's digital engagement could be improved, Muscat residents were uniquely inclined to participate in online communities (24%), far ahead of any other city in the survey. This provides an uncommon opportunity to develop a local, self-reliant creative class that could enhance the cultural landscape in areas that are undeserved and underfunded by public authorities.

Barriers to Engagement

In explaining the barriers to participation, respondents who felt they would visit less complained about the lack of time to engage in culture (56%), which was the highest in the survey. Digital participation in culture also exhibited the lowest penetration across the region, with local non-site participation measured at only 40%. One positive trend was respondents' willingness to spend on culture. Only 10% of respondents reported having spent less than $10 and no respondents (0%) highlighted cost as a reason for engaging less in culture.



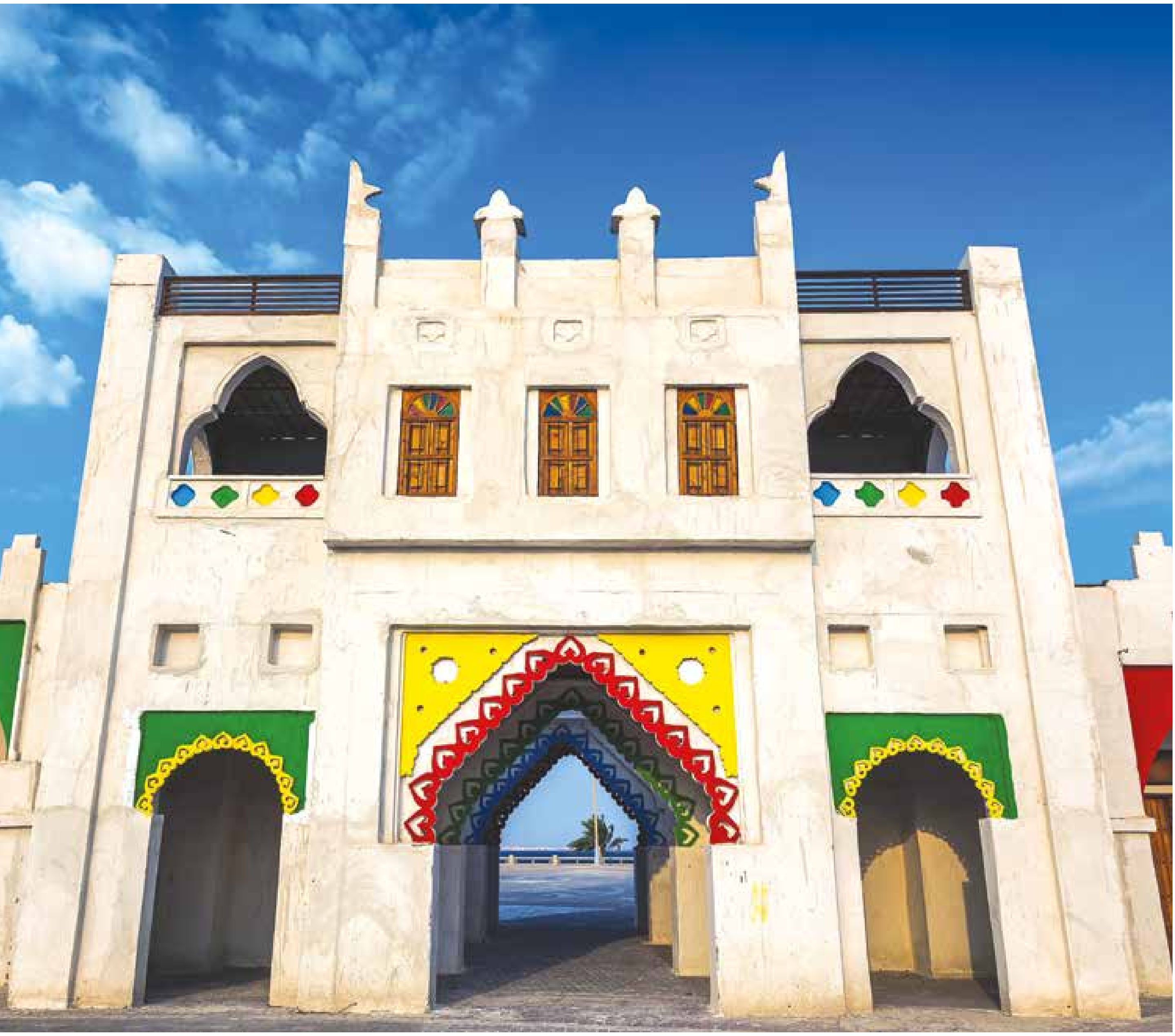
Most visited themes

Source: EI analysis

City Profile

Dammam, KSA

A E P



Country GDP

$696 billion

City population

1.25 million

Cultural reputation

Medium-high

Dammam is the center of Saudi Arabia's oil industry and one of the country's fastest growing cities, which contributed to the development of its cultural landscape. The interest of cultural consumers is reflected in high Engagement and Prioritization ratings across all themes (highest score for Prioritization among all cities). Heritage and History was the most engaged and prioritized theme overall, but high-income consumers showed a strong preference for Art and Design (38% of high-income consumers chose Art and Design as the most engaged in theme). The metric for Cultural Festivals in Dammam is on par with that of regional events hub Dubai, a national trend that Dammam is contributing to significantly.

Survey Insights

Compared to the other MENA cities, in Dammam, more respondents visited theater and performance arts spaces to participate in cultural activities. Approximately 18% of respondents in Damman visited Performance and Celebration sites compared to the regional average of 13%. Generally, across all other themes, Dammam saw balanced high-income consumers driving future participation from respondents, which is also reflected in its relatively evenly spread of its Engagement and Prioritization ratings. In Dammam, respondents expressed a willingness to visit a cultural site if there was a special event (28%) or if there were discounts on local accommodation (18%). Loyalty programs and the participation of friends and family seem to also be key draws for respondents to participate in cultural activities.

Dammam scored below average (58%) in terms of the last cultural visit being in the city, but this is not necessarily a cause for concern given the municipal area includes three different cities: Dammam, Dhahran and Al Khobar, each with a distinct cultural offering. However, a large share of respondents opted to visit sites elsewhere in the Kingdom (30%), while a significant share of respondents (10%) visited sites elsewhere in the MENA region. Perhaps the willingness to travel can be further explained by the fact that in Dammam high-income respondents were the primary contributors to future engagement. Over 79% of high-income respondents are expected to visit more, compared to 43% of low-income consumers. The survey results also showed an interest in Cultural Festivals, particularly those outside of Dammam; 22% of respondents said they would be willing to travel to attend a Cultural Festival. With the Kingdom continuing to loosen social restrictions and opening up its economy, and Dammam increasing its range of cultural offerings in tandem, the need to travel abroad is likely to taper off in favor of local participation. According to an academic from King Faisal Center for Research and Islamic Studies, during

High income consumers driving future participation

*Proportion of respondents who intend to participate more in culture in the next 12 months

95%

of people in Dammam feel participating in cultural activities helps them better understand their community

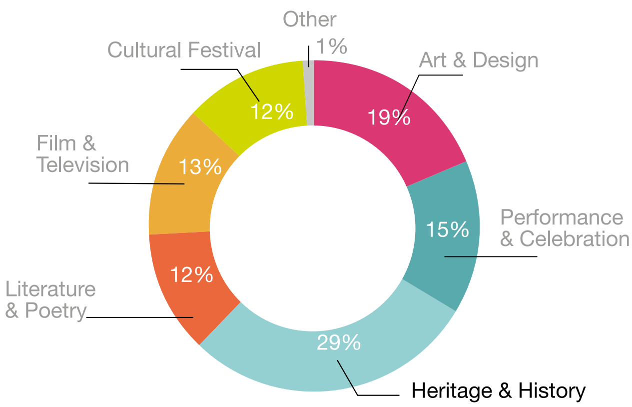
major holidays or school holidays, fewer Saudis are traveling to Dubai or Manama than previously because several experiences are now being provided locally.

Future Outlook

Overall, Dammam's cultural scene is evolving with initiatives to build its cultural identity as a part of the country's Vision 2030 project. Its most recent cultural development milestone is the King Abdulaziz Center for World Culture (Ithra), which, through its cultural experiences, is exposing consumers, as well as cultural creators and professionals, to different forms of culture. According to a Dammam-based expert, "for sustainable development to take hold in the cultural sector, it is important to lay down a solid foundation. The focus in Dammam is on exposing people in the Eastern Province to different art forms in the performing arts, for instance, through high-production-value performances in different disciplines so that they understand the creative possibilities in the field. This is part of a long-term vision."

Barriers to Engagement

Barriers to engagement in cultural activities in Dammam include factors, such as the lack of time (24%), as well as a lack of sufficient advertising for events (21%); which ranked equally with future income concerns (21%) as the main reason why people felt they may participate less next year. With only 66% of respondents (of non-site participants) engaging in cultural activities online, digital engagement in Dammam was the lowest among the three Saudi cities in the study (compared to Riyadh and Jeddah). These findings call for more investments in information sharing on cultural events, cost differentiated cultural offerings, and digital platforms and programs for culture engagement.



Most visited themes

Source: EI analysis

City Profile

Jeddah, KSA

A E P

Country GDP

$696 billion

City population:

2.87 million

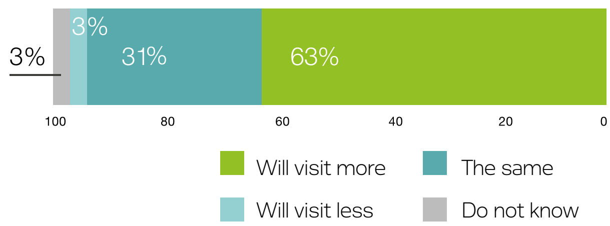
Cultural reputation:

High

As Saudi Arabia's de-facto commercial capital and the country's largest port, Jeddah has received considerable support for its burgeoning cultural landscape, as well as the preservation of its heritage as the gateway to the Holy Sites. It emerged with generally balanced scores on key metrics for Availability, and fairly high scores for Engagement (second only to Dubai) and Prioritization, which indicates an established cultural landscape that has considerable space for development. Literature and Poetry, while low on relative Availability, performed well in terms of Engagement and Prioritization. This trend, as explained by interviewed experts, is because Literature and Poetry outputs are less well-documented than other themes, and there are additional formats for the public to engage in. Oral tradition, for example, is a very popular format used to engage in this theme rather than the written word, which may not reflect in Availability.

Survey Insights

Jeddah was only one of two cities in the study where Heritage and History sites were not the most visited. Instead, consumers visited Film and Television sites, such as cinemas (24%), and Art and Design sites, such as galleries (23%), more frequently. The strong interest in cinema follows the introduction of these facilities in 2018, and may also be attributed to the hosting of the Red Sea International Film Festival in 2019, which is set to become the premier event of its type in the Kingdom and region. Looking at cultural participation more broadly, 63% of respondents in Jeddah expected to visit more cultural sites in the next year and only 3% of respondents expected to visit less (tied with Muscat for the lowest across the region). Notably, a large proportion of high-income (75%) and low-income (54%) respondents were interested in more cultural participation, which indicates a strong demand for cultural offerings in the city. Beyond visiting sites, digital engagement was high at 76%.



Expected participation in culture is high

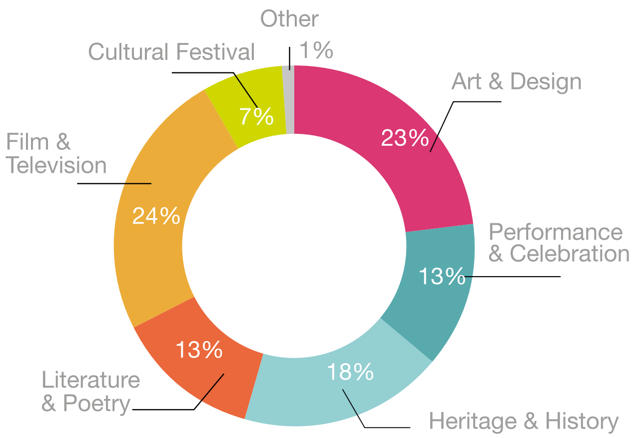
*Respondents expected to participate in the next 12 months

87%

of people in Jeddah chose to visit cultural sites within the city

Future Outlook

With many of the city's primary cultural attractions being recently established, Jeddah respondents were also very supportive of their city's cultural offerings, with one of the largest shares (87%) choosing a local attraction as their last visited site. A budding creative community may be partly behind the strong cultural engagement, and it is telling that the city was chosen by Dubai's Art Jameel Initiative to be the site of the Hayy: Creative Hub. The 21, 39 Jeddah Arts initiative is another important element of the local art scene. Overall, the city seems to complement the national drive towards cultural development and in doing so, builds alongside Riyadh's cultural scene.



Most visited themes

Source: EI analysis

Barriers to Engagement

Key to note is that only 18% of respondents who felt they would visit fewer sites next year cited less time as a barrier to engaging in culture, which was the lowest in the survey. However, despite the country's relatively healthy national income metrics, 23% of these respondents cited having less discretionary income than before as a reason to decrease engagement and 14% said a change in cost will prevent future engagement, which was the highest among all cities.

City Profile

Riyadh, KSA

A E P

Country GDP

$696 billion

City population

7.39 million

Cultural reputation

Medium

The Saudi capital, and administrative and government center, showed a varied level of Availability but scored relatively higher on Engagement metrics, implying that consumers are more willing to increase their participation in culture.

Survey Insights

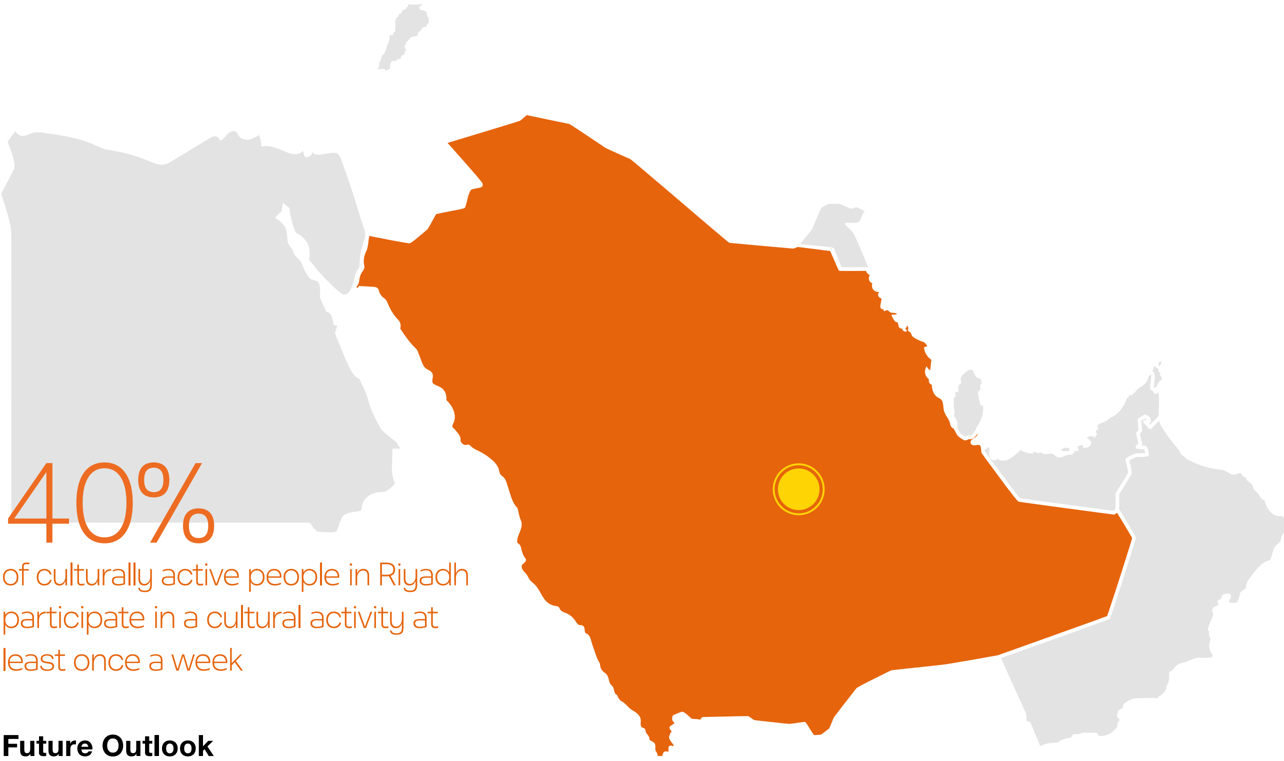
More than any other city in the survey, in Riyadh, interest in culture was very localized, with 88% of respondents citing an attraction in the city as their last visited site. Although only 8% of respondents considered cultural activities in Art and Design as representative of Riyadh's identity this did not translate into a lack of engagement. Art and Design sites, such as galleries, were Riyadh's most visited cultural sites (28%), far higher than any other city and a testament to the city's art scene. The enthusiastic response from local artists is a credit to public efforts to develop the Art and Design scene in the city. According to Muhannad Shono, an independent artist based in Riyadh, "It is becoming easier for artists to collaborate in activities and events as there is a mandate to involve Saudi artists as much as possible. I now have opportunities to work with international artists and curators and I am overwhelmed with requests for proposals. I did an art residency in Berlin for a year and my intention at the time was to stay there but the rise in opportunities and transformation in Saudi Arabia encouraged me to return to Riyadh. I know a lot of creative people who have started returning."

Participation in Cultural Festivals followed closely behind (26%), the highest proportion among all 10 cities in the study. Although Cultural Festivals are relatively recent offerings in the city, experts note that participation is picking up pace, particularly from Saudis – both as performers and participants. According to Marriam Mossalli, founding partner of Niche Arabia, a Saudi-based consultancy, "The market for festivals and large-scale entertainment events in Saudi Arabia is booming. The entertainment sector not only has the advantage of being a 'new offering' for many Saudis, but also has huge appeal among our youthful population, 70% of which is under the age of 30. This past December we saw over 400,000 people attend the MDL Beast festival—mostly all were local Saudis."

Digital engagement was also very high among non-site participants (79%) in Riyadh, with 10% of these respondents engaged in an online community, the second highest in the survey. More cultural activities that leverage digital platforms could help expand engagement across a range of thematic areas.

"The market for festivals and large-scale entertainment events in Saudi Arabia is booming. The entertainment sector not only has the advantage of being a "new offering" for many Saudis, but also has huge appeal among our youthful population, 70% of which is under the age of 30. This past December we saw over 400,000 people attend the MDL Beast festival—mostly all were local Saudis."

Marriam Mossalli, founding partner, Niche Arabia



40%

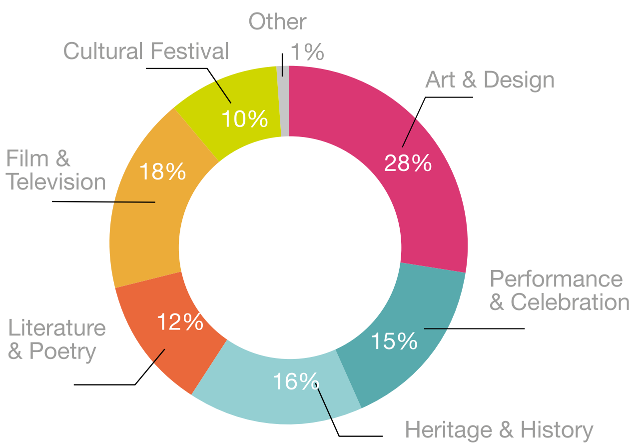
of culturally active people in Riyadh participate in a cultural activity at least once a week

Future Outlook

The role of local authorities in building the cultural scene in Riyadh cannot be understated. Initiatives such as Riyadh Art, a project created in 2019 to produce over 1,000 artworks in public areas (by both local and international artists), seeks to convert the city into an "open gallery." Government efforts, as highlighted by a policymaker from the Ministry of Culture, are focused on developing the industry and sector for tourists and local cultural consumers, while prioritizing the interest of Saudi citizens. Going forward, Riyadh will be able to lean more on a large, young and creative sub-population that is finally being provided the cultural spaces to project to wider audiences, as well as the required institutional backing. The gradual loosening of social restrictions is also encouraging previously non-existent forms of art and culture to emerge, such as opera and even stand-up comedy.

Barriers to Engagement

Similar to the rest of the region, respondents in Riyadh complained significantly about not having time to engage in culture (49%), as well as a lack of interest in advertised events and exhibitions (26%), a similar challenge to that faced in Dammam. There is, therefore, an opportunity to invest more in developing cultural events that are more accessible as part of people's every-day lives as well as enhancing the variety of offerings by bringing in cultural producers from within and outside the city.



Most visited themes

Source: EI analysis

City Profile

Manama, Bahrain A E P

Country GDP

$37.9 billion

City population

664,000

Cultural reputation

Low

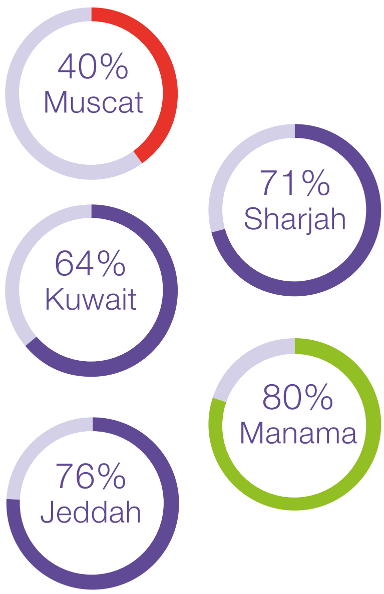
Manama generally scored relatively lower than other regional cities on all three overarching metrics. Despite this, the residents showed a relatively strong preference for Performance and Celebration and Film and Television. The latter has also historically attracted significant tourist visits from neighboring countries, particularly Saudi Arabia. According to local artists, the city has several theatrical companies that host festivals and events, but most are smaller in scale and focus on traditional theater. The National Theater, one of the largest opera houses in the region, and the cultural hall managed by the Bahrain Authority of Arts and Cultural Antiquities are expected to further boost theater-based participation.

Survey Insights

Along with Heritage and History (42%), a large number of respondents in Manama also saw Literature and Poetry as representative of their city (26%), the highest of any surveyed city. In terms of relative prioritization, Heritage and History sites, such as museums and historical sites, were the most frequently visited by people in Manama (27%), closely followed by Performance and Celebrations sites, such as theaters and concert halls (26%), the latter being the highest across the survey cities.

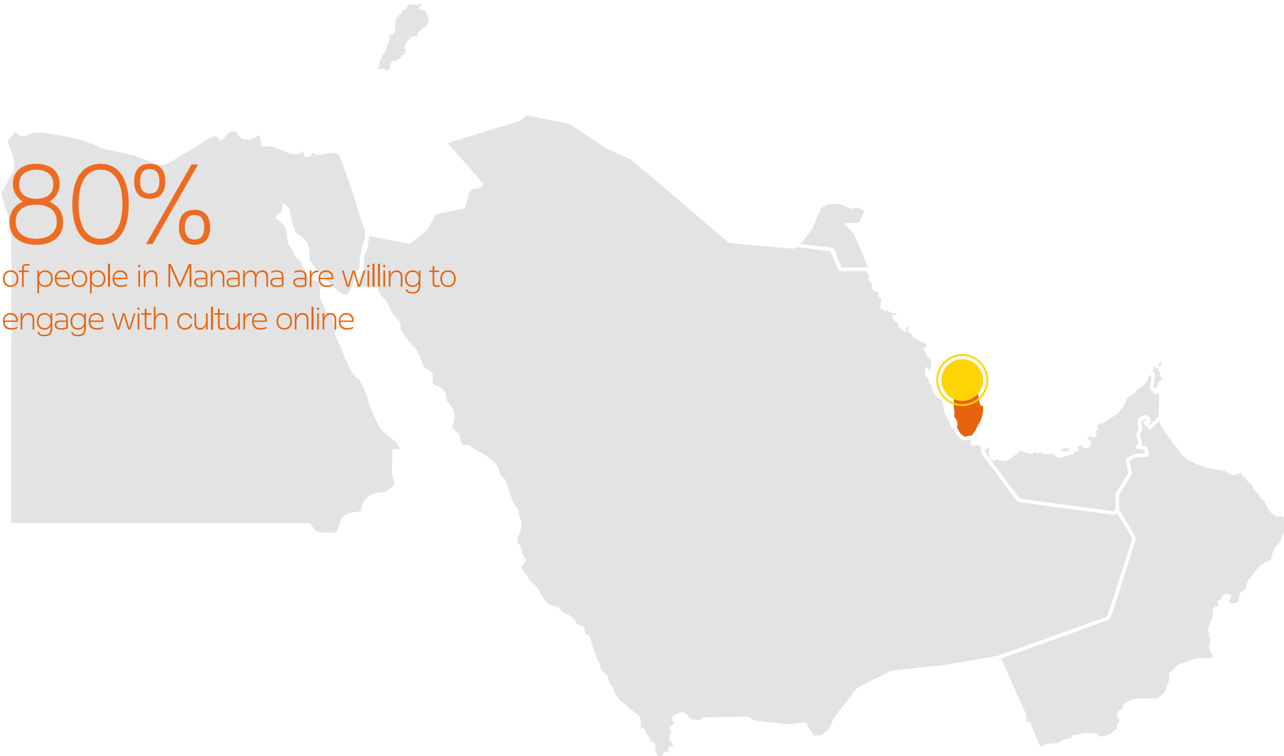
Literature and poetry-related sites were selected as the most visited by only 11% of respondents. This is likely attributed to a lack of Availability of major literary events rather than a definitive lack of interest among residents. This is further underscored by no less than 28% of respondents engaging with Literature and Poetry in terms of non-site visits, or through digital media. This was the highest for the theme across the region (one in three respondents had read an e-Book), and is supported by the highest digital engagement among non-site participants (80%) across the surveyed cities. According to Hasan Hujairi, a local artist, composer and researcher, "from the early half of the 1900s, literature in Bahrain played a central role within the cultural landscape, with poetry having the lion's share of the output. The prominence of Bahraini literature, however, seems to have gone down over the past few years."

Given the relatively smaller size of the city, shorter travel times among Manama residents were expected, with 60% of respondents needing to travel less than 30 minutes to the last cultural site visited. Travel outside of the city was also appealing, with 45% of respondents having their last cultural visit in another city in the country.



Highest digital participation across survey cities

*Proportion of non-site participants who engage digitally



80%

of people in Manama are willing to engage with culture online

Neighboring Muharraq was a key destination with several cultural activities on offer. Manama's cultural activities continue to internationalize. Events like the Bahrain Grand Prix draw in international visitors and participants.

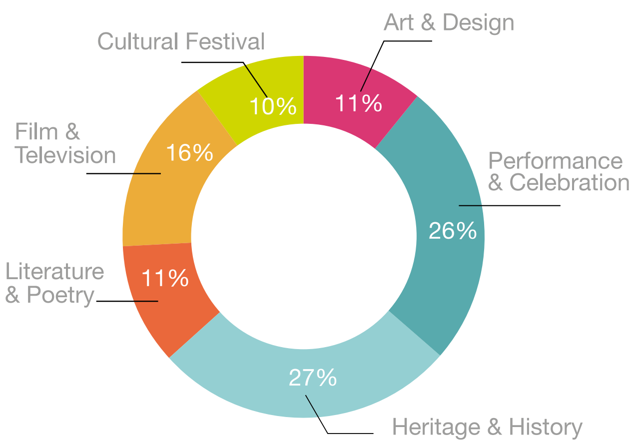
Future Outlook

In light of the highlighted barriers, local authorities are considering cultural development with increasing urgency, relying on the country's reputation for openness as well as its rich history as a regional crossroad to further prop up its heritage. According to experts, the Bahrain Authority for Culture and Antiquities is taking the lead on cultural promotion and tourism and doing so with public-private partnerships. An example of this is the "Investing in Culture" platform where the government implements the project and the private sector supports in the form of financial backing. This will be especially critical as residents in Saudi Arabia, a key cultural consumer group for Bahrain's local cultural economy, continue to localize their preferences.

Barriers to Engagement

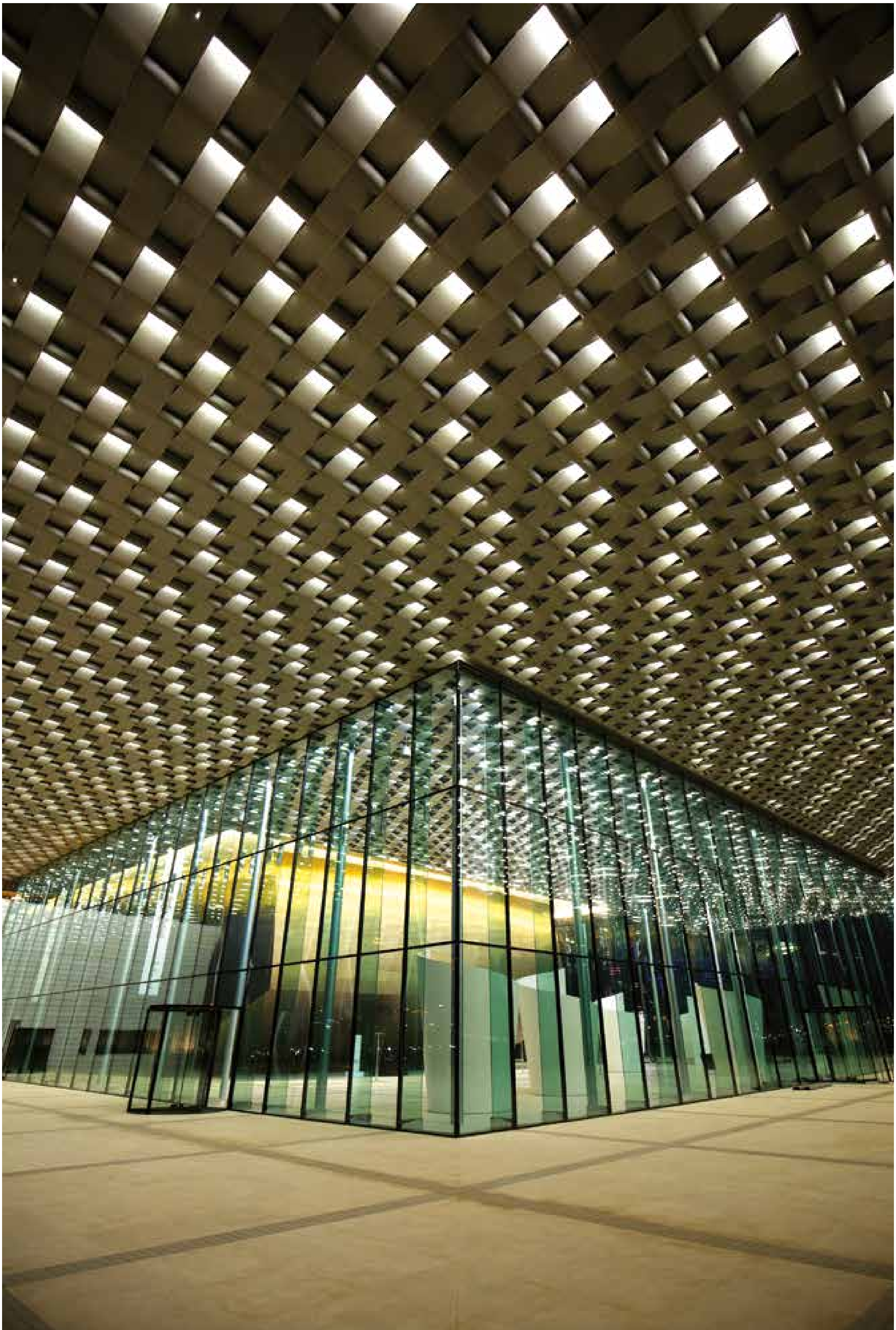
Despite positive trends for cultural engagement in Manama, only 32% of respondents in Manama were planning to visit more cultural sites in the next year, significantly lower than the regional average (48%).

Respondents who expected to participate less highlighted limited availability of information (43%) as a key barrier to future engagement, which was the highest across the surveyed cities.



Most visited themes

Source: EI analysis



Addressing Barriers to Cultural Participation

05

Despite positive participation trends,barriers to cultural development persist.

Despite significant engagement levels across the region from most participants, barriers to further cultural participation persist. These range from micro-barriers, such as site-specific shortfalls to macro-barriers stemming from industry-level issues. On a regional level, the survey revealed optimistic signs of robust engagement: a total of 48% of participants across the MENA region are expected to engage more in culture through physical visits to cultural sites, while an even larger 80% of participants were open to engaging in culture using digital mediums. Furthermore, 24% of respondents were open to repeat visits, believing there was more to experience from the site.

Barriers to Engagement

What's stopping the MENA region from reaching

Barriers at an individual level

Time constraints	Lack of family friendly activities and facilities	Limited information and awareness

Barriers at the institutional level

Limited public expenditure and support	Culture is not a part of the mainstream education system	Economic and political instability

Source: EI analysis

Nevertheless, the region still needs to address a number of challenges to achieve its potential for cultural engagement. On a micro level, barriers to engagement are largely driven by the cultural consumer's interaction with their environment and lifestyle. Recurrent complaints identified include limited time to participate in cultural activities, which was highlighted as a key barrier to future engagement by 39% respondents. This can potentially be explained by prioritizing professional or personal commitments and, in some cases, long travel times to cultural sites (though not all cities had the latter problem).

Participants also highlighted lack of information on a cultural site as a key barrier (18% of respondents), exhibiting a gap in communication between these sites and their target demographic, despite previously mentioned outreach and digital engagement efforts. While digital participation was highlighted as a key driver of cultural engagement by the experts interviewed for the study, as per the survey results, digital participation needs to increase further to meet high demand. Some 80% of respondents agreed with the statement "a person can participate in culture online;" however only 33% reported any actual online cultural participation. This may require special attention to encourage digital participation amongst women, which is slightly lower than amongst men; 30% participated online in the last year versus 35% of men.

From a macro perspective, numerous structural barriers are evident, primarily in the areas of funding, education, and stability. While the Gulf states benefit from more extensive public funding and a willingness to invest it in the cultural sector, the same cannot be said of countries in the Levant and North Africa. Recently faltering economic growth has placed additional strain on government budgets, effectively eliminating the necessary fiscal space to increase cultural expenditure at the expense of other critical national needs. Consequently, the sub-region's creative class must operate with considerable constraints and sub-standard shared resources when producing and showcasing their offerings. According to a Beirut-based policymaker working with the Ministry of Culture, many of these countries have the burden of excessive red tape, which complicates approvals and licensing. This makes organizing large-scale events and festivals harder and costlier than they should be. For Beirut, this was evident from a relatively low willingness to participate in cultural activities. Only 28% of respondents expressed their willingness to visit more cultural sites in Beirut, against the regional average (48%).

A broader problem, not necessarily limited to the Levant and North Africa, is that culture is not considered a core subject in the region's education systems. The omission is evident both in primary and secondary schools where the value of culture in society can be presented as foundational, as well as at university level, where this education can be specialized and professionalized. This lack of emphasis on cultural education has also potentially contributed to a shortage of trained cultural specialists, such as curators and operators. This is problematic in countries where trained manpower is critical to the successful expansion of new cultural institutions and spaces. However, it also affects countries where institutions and spaces still lag behind, but a rich cultural heritage continues to drive large numbers of international tourist visitors. Egypt, for example, is unable to capitalize on this demand due to lack of trained manpower, according to local experts.

Pervasive throughout the region, issues around political stability and security weigh heavily on cultural development, most acutely in countries such as Lebanon and Egypt. Despite being one of the most important tourist destinations in the region, with a vibrant cultural scene for music, cinema and other cultural themes, "International tourists come to Cairo but don't want to return due to poor infrastructure. As per recent research, a very small percentage of tourists visiting Cairo want to return, compared to more developed cities, like Paris, where as high as 98% of tourists want to return."

Bahia Shehab, a multidisciplinary artist, historian and educator based in Cairo

Cairo has suffered from a pronounced drop in tourism since the 2011 revolution. According to local participants and authorities, it has not yet recovered, weighed down by a lack of repeat tourism.

The dependence of many cultural sectors on tourism may result in a further decline in engagement in light of the 2020 Covid-19 pandemic and the consequent economic fallout, although the disruption is likely to be temporary. This further highlights the need for adequate public support to better manage shocks, particularly for cultural experiences that are more difficult to represent through digital engagement. Ultimately, these macro challenges are rooted in whether cultural development can be positioned within broader national economic development policies. This will require authorities to see the cultural sector as intrinsically tied to other sectors, such as real estate, hospitality and tourism. Given the many common elements of cultural heritage, a further challenge will be to strengthen the mechanisms for cultural exchange across the region so that cultural engagement on a regional level can thrive, despite the unique challenges and resource constraints facing individual countries. Ultimately, it will be key for the region to overcome its shared challenges in unison.

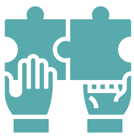
Recommendations to address identified gaps in cultural development

In previous paragraphs, the report highlighted the barriers and challenges to cultural development in the region, as well as across the focus cities. This section offers a series of recommendations to address some of the identified gaps. These are geared not just to policymakers, but for all agents of culture involved in shaping each city's landscape. Successful cultural policy is based on inter-agency collaboration, leveraging the strengths of public and private players as well as the communities themselves.

The recommendations presented here are intended to drive discussion that will foster further development of cultural platforms, primarily through improving cultural accessibility and engagement in the region.

Accelerated growth:
Recommendations for accelerating cultural participation

تعزيز التفاعل الثقافي الإقليمي



على المؤسسات في الأسواق المنشأة حديثًا وغيرها، أن تتعاون لحفز المشاركة الثقافية عبر المنطقة.

جعل المشاركة الثقافيّة شاملة

يجب تبني إستراتيجية تواصل هادفة لتحسين المشاركة بين الفئات ذات الدخل المنخفض. يجب استكشاف سبل مثل المشاركة الرقمية لإمكانياتها الكاملة.

التركيز على التعلُّم الثقافي

ينبغي على المبادرات الرامية إلى الحفز على التعلُّم طول العمر، أكانت عبر المزيد من التشديد في المنهاج التربوي أو جهود المجتمع الأخرى، أن تُطَبَّق لتنشيط الالتزام الثقافي.

"Having one big event that showcases the cultural activities available in the region would be a great advantage. It would bring local cultural consumers together, as well as attract international audiences (as seen with the Venice Biennial)"

Olivia Sand, author of Contemporary Voices from the Asian and Islamic Art Worlds

Cultural institutions in the MENA region should learn from each other's distinct strengths to help boost participation across the region

- In the UAE and Saudi Arabia, investments in developing cultural infrastructure are driving participation, whereas in more established markets interest from the resident population is plateauing – less than 30% of people in Beirut feel they will visit cultural sites more next year.

- This presents institutions in each city with fresh challenges; in newer markets there is a focus on increasing foreign as well as local visitors. In cities with more established cultural landscapes, the offerings need to be re-invigorated to attract fresh interest.

- Partnerships between these institutions can help transfer relevant expertise. For example, institutions in high growth markets can support others in new ways to drive engagement. While those in markets such as Cairo and Beirut can share their experiences in catering to international consumers.

- Improving opportunities for intraregional interaction for culture producers, as well as consumers, can promote cultural exchange in the region.

Policymakers and service providers need to focus on making cultural participation more inclusive

- Currently, low and medium-income respondents are participating less frequently in cultural activities than high-income respondents, and are less confident they will participate more in the future.

- This is primarily driven by an information barrier: 55% of low-income respondents who did not participate in culture through other mediums outside of visits said they would participate more in culture if they had more information on how to engage.

- Policymakers and service providers need to reconsider how they communicate with lower income audiences – potentially considering sources outside of traditional channels to address these issues.

- Avenues like improving digital access to cultural activities should be considered; 63% of low-income respondents kept in touch with cultural sites via social media. Options like flexible opening times of cultural sites and better availability of family friendly experiences can be explored to improve participation among low-income groups.

- Investment in local culture, specific to cities, regions or communities, is important for increasing access and awareness.

To ensure sustainable growth, people need opportunities to broaden their forms of participation

- The desire for cultural learning seems to be supported by survey respondents, 23% of respondents cited the desire to learn something as a reason for visiting a cultural – the most popular motivation for cultural participation.

- Initiatives to promote life-long cultural learning, either through greater emphasis in education curriculum or other community-based efforts, will increase cultural engagement.

- As governments increasingly recognize the significant economic gains linked to cultural development, the case for broadening cultural education becomes more evident.


EMAAR
EMAAR

The Future of Cultural Engagement in the Region

06

"Covid-19 has put many intangible cultural heritage practices, including rituals and ceremonies, on hold, impacting communities everywhere.
It has also cost many jobs, and across the globe, artists are now unable to make ends meet. Many arts businesses will find it economically difficult to recover."

UNESCO, 2020

Covid-19 and culture: A push towards digital engagement

The MENA region's cultural sector, like those in most parts of the world, has been, and is likely to continue to be, disrupted by the Covid-19 pandemic through 2020 and beyond. The imposition of lock-downs, public movement restrictions and social distancing has forced the cancellation or postponement of virtually all public cultural events in the cities researched for this study. Museums, theaters and other cultural sites have also been closed for the foreseeable future. These shutdowns will result in considerable loss of revenue for cultural operators, the freezing of a significant portion of public and private investment and leave local artists without the physical spaces and platforms to further develop their work. The cancellation of all cultural activities will create financial hardship for small and medium size businesses, which are the major components in the sector.

On a sectoral level, the economic impact of the pandemic may also lead to a diversion of funds that were earmarked for cultural development into other essential sectors that will need support for recovery. According to regional experts, countries where public investment in the cultural sector was minimal, like Lebanon and Egypt, are likely to be the most impacted in this regard, especially in light of the pressure placed on these economies by the pandemic. At an individual level, the crisis will lead to many cultural workers and artists losing their source of income. As per UNESCO, "Covid-19 has put many intangible cultural heritage practices, including rituals and ceremonies, on hold, impacting communities everywhere. It has also cost many jobs, and across the globe, artists are now unable to make ends meet. Many arts businesses will find it economically difficult to recover."

Despite this disruption, the pandemic's restrictions on movement may offer an opportunity to further develop the avenues through which culture can be accessed by consumers. Taking advantage of the digital revolution and the high levels of digital engagement with culture that already exist will be key. The survey revealed that 80% of respondents were willing to digitally engage with culture in the region, with this figure likely to rise as a result of the pandemic. Some artists and theaters around the world have already taken advantage of the situation and organized virtual concerts and live streaming events. These are often provided to the public for free, eliminating another barrier to cultural engagement. Several museums are offering virtual tours and some are even reporting online traffic jumping by as much as 1,000%. The pandemic should drive many of the MENA region's most important cultural sites to follow suit and develop a comprehensive set of online facilities. These should not only be designed and operated for the duration of the pandemic, as they will still hold significant value as an alternative to in-site visits once public movement restrictions are loosened.

For the majority of cultural consumers, digital media (and particularly social media) is currently the main way to communicate with others.

Local artists can also benefit from the higher levels of digital engagement brought about by the pandemic. For the majority of cultural consumers, digital media (and particularly social media) is currently the main way to communicate with others. More digital foot-traffic translates into more interactions between artists, creators and audiences, offering additional inspiration and idea generation for more content production. It is likely that this newfound network will remain firmly established even after the pandemic is over, opening new avenues for independent artists and grassroots cultural organizations to promote their content.

Covid-19 and culture: A push towards digital engagement

Assuming that pandemic-related disruptions subside in the short term, the outlook for cultural participation and consumption in the MENA region is positive, notwithstanding the specific challenges that all cities stand to face. The survey showed that an overwhelming number of respondents intended to engage with culture by visiting cultural sites more or at least at the same level, with only a small minority (7%) feeling that they would engage less. Another encouraging sign is that the potential for repeat engagement is quite high on average. Almost half of respondents (49%) who felt they will participate more in the next year stated their desire to visit their favorite cultural site again because there was more to get out of it. This is consistent with respondents showing general interest in the content and an eagerness to learn more. Many respondents also saw cultural engagement as a social activity, expressing a likelihood to visit more cultural sites because of interest from family and friends, a metric that would see even greater interest with the introduction of more family friendly activities.

If the opportunities for greater digital engagement as a result of the pandemic take hold, the region could also be on its way to diversifying its digital culture consumption, which is currently dominated by media like video and music streaming. Higher digital engagement would also position social media as the preferred method for consumers to stay in touch with cultural sites and updated on their latest offerings. This trend was replicated in all cities surveyed, regardless of their digital infrastructure or penetration.

The future of cultural development in the MENA region will also see some cities work towards becoming more globalized cultural hubs. However, policymakers across the region appear to be keenly aware that complementing each other's strengths will serve their interests better than competing directly. Although all of the cities cited Heritage and History as the theme most representative of their city's cultural identity, it is clear that most are also connecting more with smaller themes, such as Art and Design in Dubai, Film and Television in Cairo and Kuwait and Cultural Festivals in Riyadh and Muscat. As cultural offerings from these themes grow, so residents' views will gradually change with respect to what their cities can represent and what they see and define as culture.

Ultimately, the road to each city's cultural success will depend on the strategic vision for cultural development set by local and national authorities, the way in which private businesses, academia, and non-profit institutions can contribute, and most importantly, how an encouraging ecosystem for local communities to participate in culture can be created. Even though each city faces its own unique challenges, some of which will prove more difficult than others to overcome, the cultural landscape in the MENA region faces a bright and collaborative future.

APPENDIX 1: Research methodology

This report is built around a mixed-methods design with both qualitative and quantitative components. The report's findings are primarily drawn from an extensive survey conducted across the Middle East and North Africa (MENA) region, supplemented by secondary data collection and qualitative insights drawn from expert interviews and a comprehensive literature review.

The quantitative data from the survey and secondary sources is used to generate scores on the key axes of Availability, Engagement and Prioritization through a scoring framework elaborated here. Qualitative insights from experts and relevant literature contextualize the results. They were also crucial to defining and operationalize the categories used in the research.

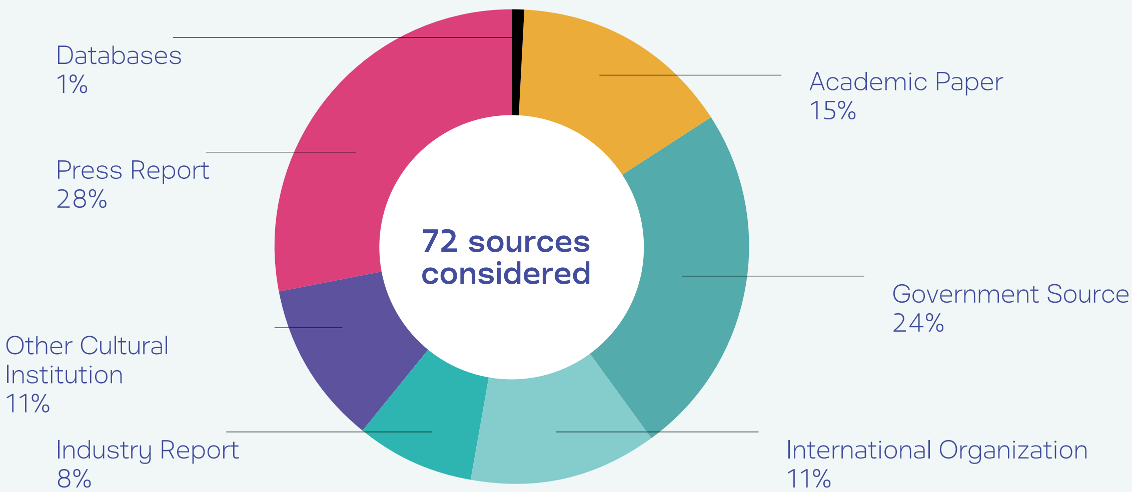
Ten major cities were selected from across the MENA region for the study: Cairo, Beirut, Dubai, Sharjah, Kuwait City, Muscat, Dammam, Jeddah, Riyadh and Manama.

Research methods

Literature Review

Literature reviews are a central component of all the Economist Impact's (EI) bespoke research programs. Supported by our in-house team of librarians and information specialists, we created a dual-language (English, Arabic) search strategy for this project that included specialist, academic, and gray literature databases, along with premium media outlets and aggregators from the EI's in-house library.

The review was comprehensive and covered both international and MENA-based sources. A total of 72 verified sources were reviewed to define culture and gather theme- and city-specific insights. We addressed a set of research questions pertaining to the perception of culture, relative cultural priorities, cultural ecosystems, global/local cultural drivers, cultural policies and economic impacts.



Expert Interviews

We conducted in-depth qualitative interviews with experts on the cultural landscape of the region. This included academics, service providers, and policymakers. We identified these experts based on their relevance to the subject matter, ensuring representation of expertise and experience across particular cities and themes. While some contributed anonymously, others were happy for their details to be shared. These experts are listed here:

- Noha Kattan, Executive Director of Strategic Partnerships and Development, Ministry of Culture, Saudi Arabia
- Hala Badri, Director General, Dubai Culture and Arts Authority
- Lynn Tehini, Senior Advisor to the Minister, Ministry of Culture, Lebanon
- Charles Pocock, Managing Partner, Meem Gallery
- Saleh Barakat, Owner of Agial Art Gallery, Lebanon
- Wakim Zeidan, General Director at Nuqat Foundation, Kuwait
- Thomas Girst, Global Head of Cultural Engagement, BMW
- Lyne Sneige, Director, Arts and Culture Program, Middle East Institute, United States
- Olivia Sand, Author, *Contemporary Voices from the Asian and Islamic Art Worlds*
- Dr Mark Thompson, Senior Associate Fellow, Head of the Socioeconomic Unit, King Faisal Center for Research and Islamic Studies, Riyadh, Saudi Arabia
- Muhannad Shono, Artist, Saudi Arabia
- Razan Al Sarraf, Artist, Kuwait
- Bahia Shehab, Artist/Academic, The American University in Cairo
- Hasan Hujairi, Artist, Manama
- Ibrahim Gailani, Artist, Muscat
- Marriam Mossalli, Founding Partner, Niche Arabia, Saudi Arabia

The interviews conducted were semi-structured, based on a questionnaire, but allowed for relevant digressions to deep dive into topics. Each interview lasted between 30-60 minutes, with topics primarily revolving around the cultural ecosystem and behavior of residents in the MENA region.

We also interviewed a number of experts from the Ithra organization across various functions and departments.

Survey

We conducted an extensive survey of over 5,000 respondents in the 10 cities under study between March and April 2020. The sample for each city was n=500, who were selected based on the following criteria:

- Over the age of 15 years
- Had participated in culture in the last 12 months (self-reported)
- A resident of the city at the time they were being asked about it (self-reported)

We used two different approaches to administer the survey:

- 63% of the respondents completed a Computer Assisted Telephone Interview (CATI) – where they were selected out of the public registry.
- 37% were selected using systemic sampling from members of an online panel to complete an online questionnaire.

N.B. For CATI surveys, a slightly shortened version of the questionnaire was employed to ensure full coverage.

Demographic information on respondents was also collected. This allowed us to analyze the results according to key demographic variables, such as age, gender and household income and break down the results according to these variables.

The key topics covered in the survey were:

1. Respondent's definition of culture

2. Visits to cultural sites:

- Preferences for the type of cultural site respondent liked to visit
- Frequency of respondent's visits to cultural sites
- Activities completed by respondent while at cultural sites
- Respondent's satisfaction with cultural sites
- Respondent's intent to visit cultural sites in the future

3. Other forms of cultural engagement:

- Respondent's view on digital participation in culture
- Respondent's interest in different cultural themes
- Frequency of respondent's non-site cultural engagement
- Activities completed by respondent that they considered cultural engagement
- Respondent's general intent to engage with culture in the future

Secondary Data Collection

To assess the availability of culture in the MENA region information on the number of cultural sites in the region was collected. The research strategy adopted was to review publicly available data on cultural sites in the MENA region. To do this, we used a keyword search strategy to conduct a comprehensive review of 350+ data sources, including government websites, national directories, public databases and tourism/travel media.

The key variable, the number of cultural sites, was measured per city, by identifying and counting the number of sites in each city. These numbers were disaggregated by theme, in accordance with the following definitions:

Theme	Sites
Art and Design	Gallery, site of architectural interest
Performance and Celebration	Theater, concert hall, music practice room
Heritage and History	Museum, archaeological site, building of historic architectural significance, archives, monuments
Literature and Poetry	Library, book launch or other literary events
Film and Television	Cinema, Film or TV studio or film festival
Cultural Festivals	Cultural festival

Through this, we were able to obtain '[theme] x [city]' data for "Availability" of culture.

A note on sources: As the focus was on capturing availability from the perspective of the cultural consumer, we only focused on sources that would be accessible to these consumers. Public authority websites were prioritized as the most robust sources of information. Studies conducted in the past to assess the availability of cultural vibrancy in the region were used to identify some of the resources.

Data validation: Location was an important criterion for the collection of city data, therefore, geolocation acted as an additional layer of data verification. Only the sites in each city's municipal area were considered. For example, for Dammam, we included Al Khobar and Dhahran (municipal Dammam). For Cairo, the Cairo Governor-ate (defined as the Cairo municipality) was considered. Wherever prominent sites were located around the city (at a distance of approximately 100–200km from the city center), these were included in the count if verified by a government source. Previous literature was also used to authenticate the final numbers. As a final verification step, the results were also validated through insights from city-based experts.

Analytical framework for Availability, Engagement and Prioritization ratings

To compare and map the cultural landscape of the MENA region, we used a framework that focused on three key metrics: Availability of cultural activities, Engagement with cultural activities and Prioritization of cultural activities. The metrics are defined below:

1. Availability refers to the number of cultural sites in a city
2. Engagement refers to the level of active participation in culture
3. Prioritization refers to the relative preference for a specific cultural theme

The analytical framework involves two major components, summarized here and elaborated upon through this section:

Step 1: Generate scores for Availability, Engagement and Prioritization (A, E, P) for each city, for each theme

- For Availability, we used secondary data collected on the number of cultural sites.
- For Engagement and Prioritization, data from selected survey questions (with appropriate weights) were aggregated to generate scores. Variation in survey response rate across cities was corrected.

Step 2: Assign a High, Medium or Low (HML) rating for each city for each theme based on above scores

- Scores for all three categories were normalizes relative to their respective mean scores.
- We defined "cut-off" points, which were used to assign HML ratings to the normalized scores.

Generate A, E and P Scores

- Availability: Number of sites from secondary data
- Engagement and Prioritization: Weighted aggregation of survey data

Assign H, M and L Ratings

- Normalize scores
- Assign HML ratings

Our framework generated a score and HML rating for each metric for each city across the six cultural themes. For each theme, a regional average was also obtained for each of the three metrics. To compare overall cultural Availability, Engagement and Prioritization between cities, overall city performance across themes was also measured.

These scores summarized the insights from the survey in a synthesized way, which allowed us to draw a comparative assessment across MENA cities. It also enables a comparison of the availability and popularity of particular cultural themes in different cities.

	Theme 1	Theme 2	Theme 3	Overall
City 1	Theme*city A E P	Theme*city A E P	Theme*city A E P	City overall A E P
City 2	Theme*city A E P	Theme*city A E P	Theme*city A E P	City overall A E P
City X	Theme*city A E P	Theme*city A E P	Theme*city A E P	City overall A E P
Region	Regional Average E A P	Regional Average E A P	Regional Average E A P	

Availability, Engagement and Prioritization Scores

For Availability, scores measuring the number of cultural sites were generated using the process outlined in the section on secondary data collection. The number of sites is an indicator for supply of cultural experience in the form of avenues for cultural engagement available to residents. We used qualitative insights to contextualize the availability and accessibility of culture for each city.

For Engagement and Prioritization, questions from the survey that provide information on a respondents' engagement with culture or their prioritization of particular cultural themes were chosen. Six questions were selected for Engagement and combined into sub-indicators for current engagement, frequency of engagement, change in engagement, and future engagement.

For Prioritization, four questions were selected and combined into sub-indicators for site prioritization and current and future relative interest in visiting a site. The coding of the data from these questions to generate the score depends on the question's structure, and this is outlined below:

Nº	Survey Question	Coding/Scoring Note
	ENGAGEMENT	
A	**Current engagement - site + non-site**	
1	Which of the below sites have you visited in the last 12 months?	Number of respondents choosing each of the sites
2	Have you engaged with culture through any activity that does not include physically visiting a cultural site? What [THEME] did you engage with?	Number of respondents choosing each of the themes
B	**Current frequency of engagement - site + non-site (calculating high-frequency)**	
1	How frequently have you visited [SITE] in the last 12 months?	Number of responses in two higher frequency categories ("more than six times", "five to six times") aggregated to estimate number of high-frequency visitors
2	For [THEME], how frequently do you engage (across all activities)?	Number of responses in two higher frequency categories ("once a week", "three to four times a month") aggregated to estimate number of people who engage with high-frequency
C	**Change in engagement**	
1	In the last 12 months have you engaged with [THEME] more or less frequently than in the preceding 12 months?	Number of positive responses for each theme
D	**Future engagement**	
1	In the next 12 months do you expect to engage with [THEME] more or less frequently than in the past 12 months?	Number of positive responses for each theme
	PRIORITIZATION	

Nº	Survey Question	Coding/Scoring Note
A	**Prioritized site - current**	
1	Please rank the sites you have visited ordered by the number of times you have visited them in the last 12 months? (e.g., number 1 for the most visited, please do not rank the sites you have not visited)	Number of responses that rank a site 1
B	**Prioritized site - interest in present**	
1	If all [SITES] were available in your city, which of the following are you most interested in? You can select the [SITE] you have visited previously. (If multiple, respondent will be asked to prioritize)	Number of respondents selecting each site as the site of most interest
2	In terms of other engagement with culture, which of the following [THEMES] are you most interested in?	
C	**Prioritized site - interest in future**	
1	For the [SITES] you are interested in, which do you think you will actually visit in the next 12 months?	Number of respondents selecting each site as being most likely to visit

N.B. Most questions were weighted equally (their data simply used as is) with some exceptions. Section A for both Engagement and Prioritization in the above table were weighted twice as much as the other questions, because they inform us directly about current engagement and current prioritization for each theme.

With these weights, the data from the questions was simply aggregated to generate overall Engagement and Prioritization scores for each theme for each city. To correct for the effects of variation in response rates across cities, we divided the Engagement and Prioritization scores by the total number of survey responses from the city.

High/Medium/Low (HML) Ratings

A relative scoring and rating mechanism was devised to present the results in an intuitive and accessible format. As a result, the aggregate scores generated in the previous section can be understood in relation to other scores within the same category.

Ultimately, we were then able to directly compare cities and particular themes along any one of the three metrics. The ratings across the three metrics are also meaningful together, so we can say that a city has low availability for Art and Design but high engagement with this theme.

Normalisation

We conducted a normalization of the scores, relative to mean and standard deviation, for each of the three metrics. The resulting relative scores (Z-scores) represent the difference of the score from the mean of scores for the metric (corrected by the standard deviation).

The formula is as follows:

$$Z\ score = \frac{Absolute\ score - Mean}{Standard\ deviation}$$

The new distribution of relative scores is a sample from the standard normal distribution, with a mean of 0 and a standard deviation of 1. The relative scores for each metric are particular to that metric but unified under the HML framework. Irrespective of the range of the absolute scores, the relative scores now represent deviation around a mean of 0. Furthermore, differences in the level of dispersion of the scores are accounted for, so all three sets of scores have similar levels of variation.

Assigning Ratings

To assign relative ratings, an interval, or "cut-off" point, was assigned such that a score below the lower bound was assigned the "Low" rating, scores within the interval were assigned "Medium" and scores above the upper bound were assigned "High."

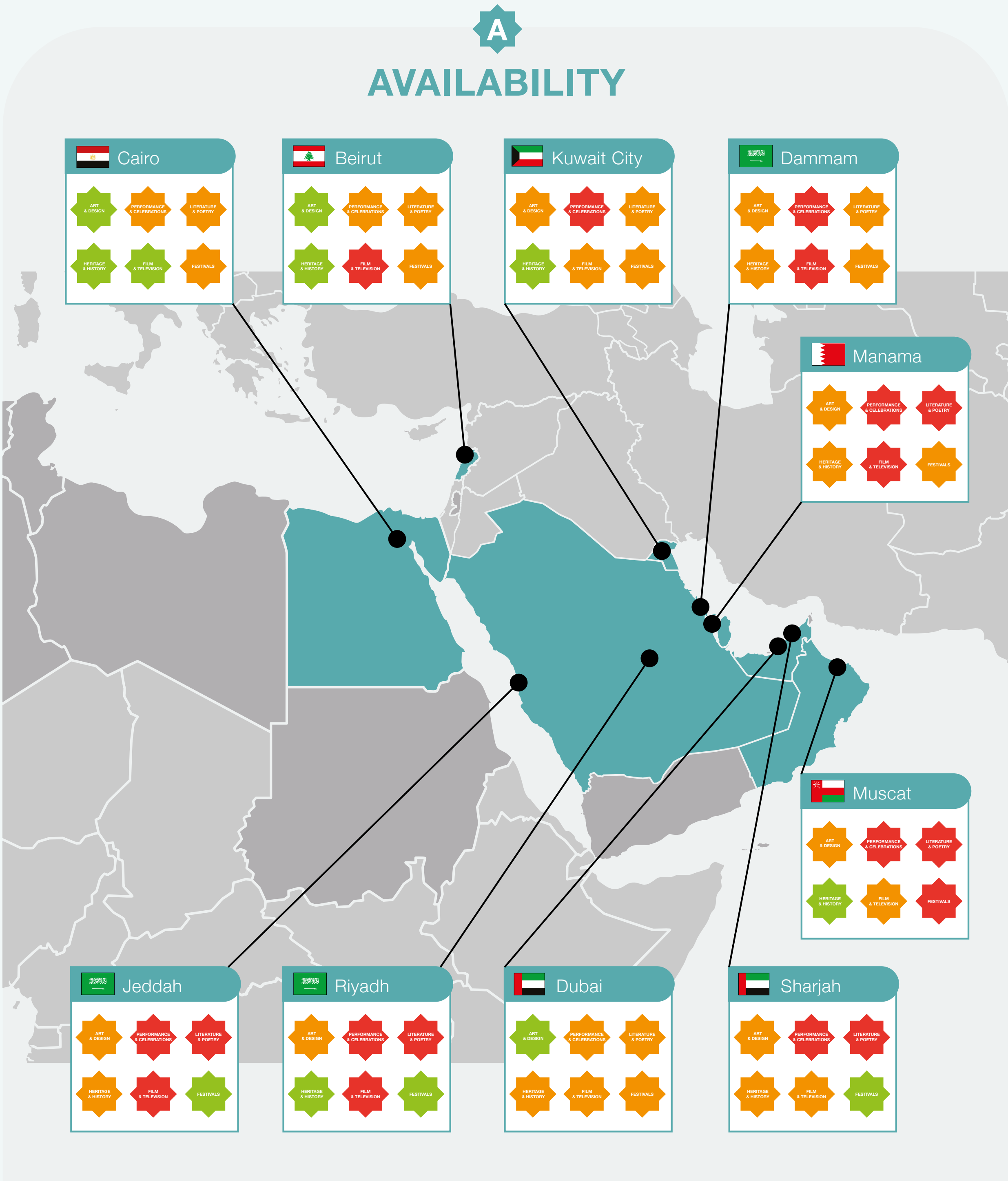
The cut-off point assigned was the Z-score -0.5 (or half the standard deviation) for the lower bound and the Z-score +0.5 for the upper bound.

Cut-off Condition Rating	Gallery, site of architectural interest
If relative score is less than -0.5	Low (L)
If relative score is equal to or greater than -0.5 and equal to or less than +0.5	Medium (M)
If relative score is greater than +0.5	High (H)

These are standard cut-off points based on which we expect 30% of scores to receive an L, 30% receive an H and the remainder receive an M rating.

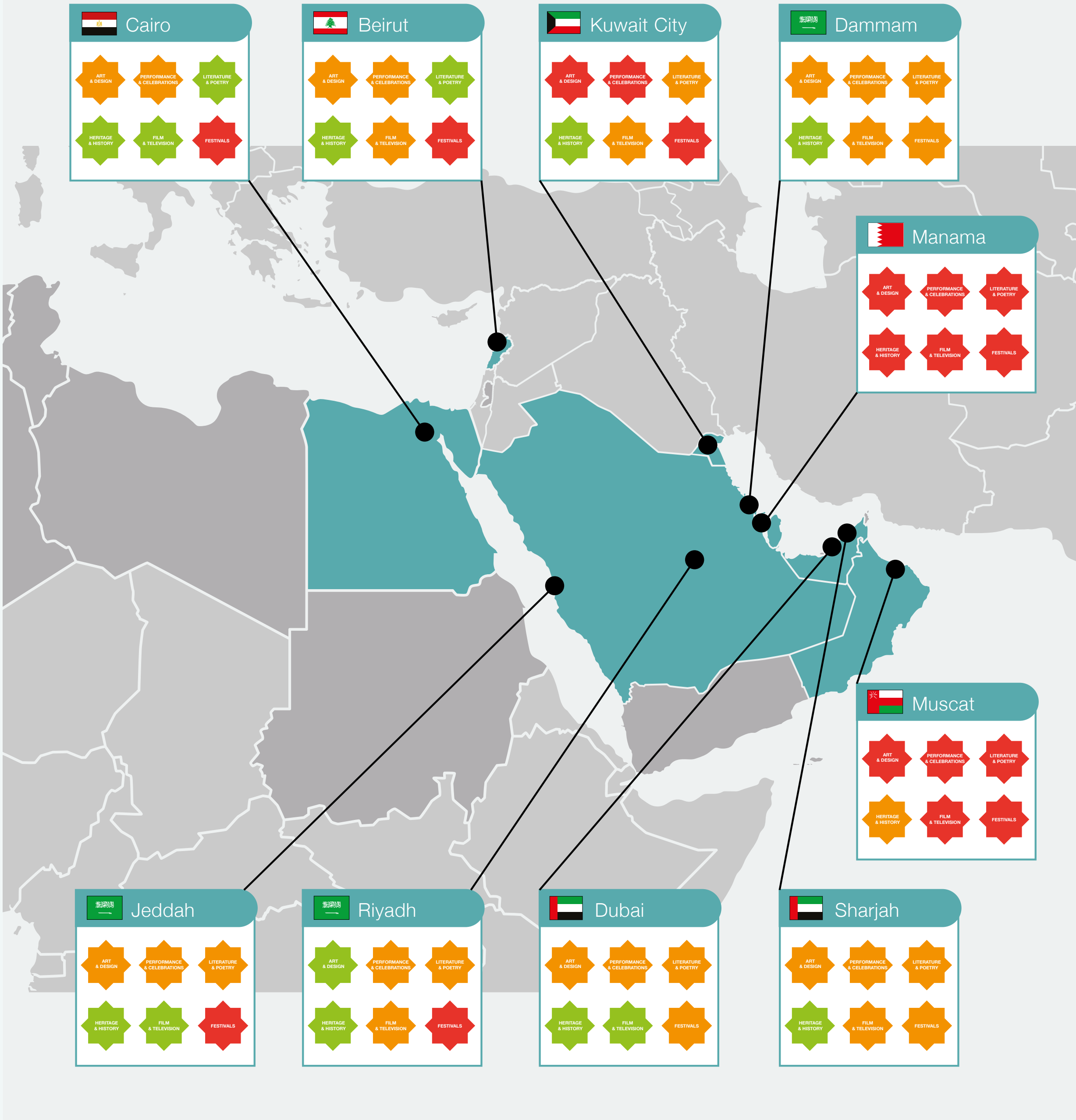
N.B. For availability, due to greater variation in the data, we used cut-off values of -0.75 and +0.75.

APPENDIX 2:
City-level findings:
Availability · Engagement · Prioritization of key cultural activities



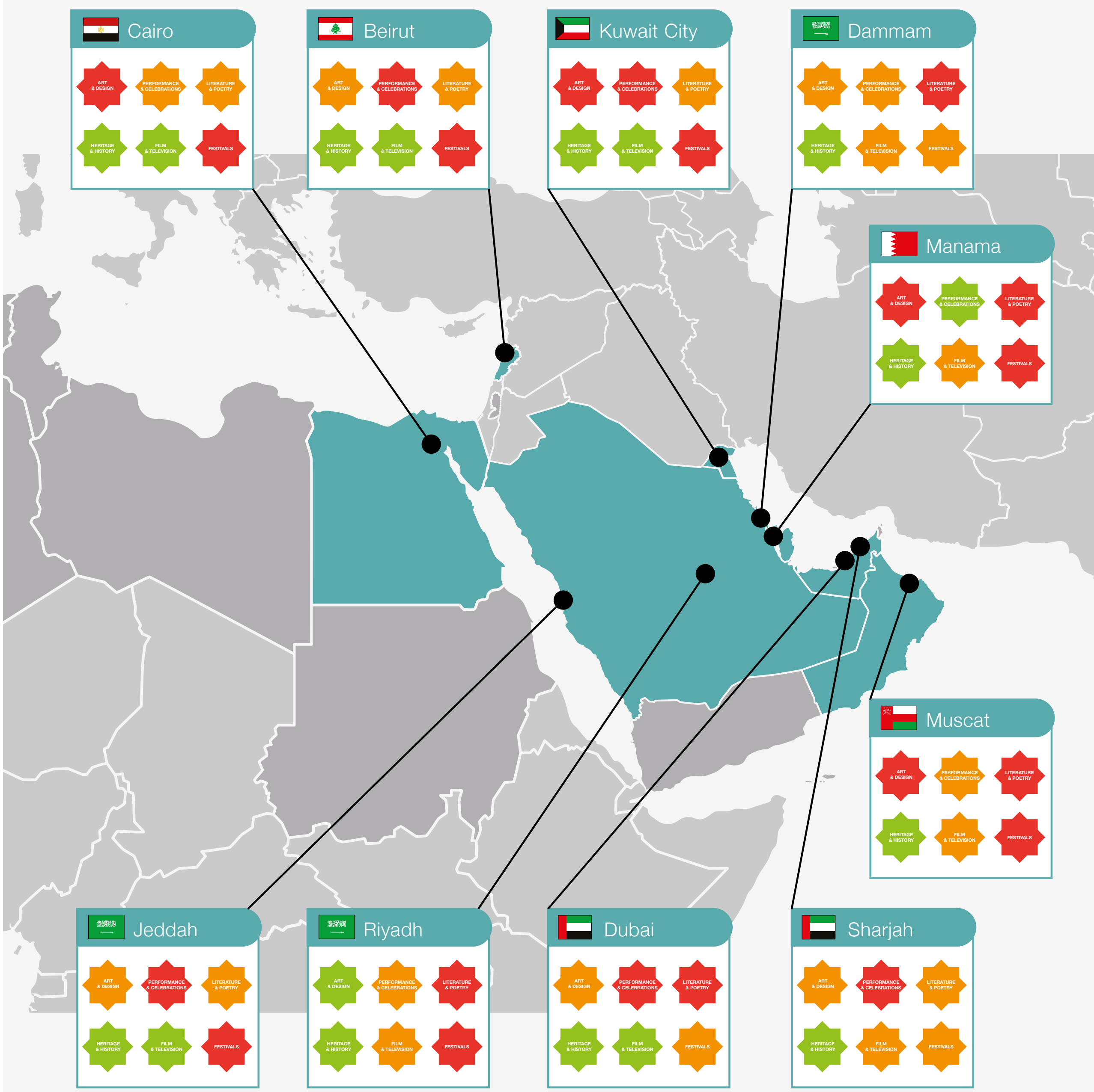
Source: EI analysis

ENGAGEMENT



Source: EI analysis

PRIORITIZATION



Source: EI analysis

Endnotes

1. "Cultural Vibrancy in Arab Cities" report published by Nuqat in 2019
2. A detailed research methodology can be found in Appendix 1
3. Department for Digital, Culture, Media and Sport, Taking Part Survey 2017, United Kingdom
4. Department for Digital, Culture, Media and Sport, "Taking Part Survey: England Adult Report, 2017/18", 2018, 1
5. For the purpose of the study, the following classification has been used to classify the monthly income levels as low, medium and high:

Income classifca-tion	**Saudi Arabia**	**Kuwait**	**UAE**	**Egypt**	**Lebanon**	**Oman**	**Bahrain**
Low	Less than SR 7,500	Less than KD 400	Less than DH 7,000	Less than EGP 2,500	Less than USD 1,500	Less than OMR 400	Less than BHD 400
Medium	SR 7,501 -15,000	KD 401 – 1000	DH 7,001 – 20,000	EGP 2,501 – 15,000	USD 1,501 - 4,000	OMR 401 – 1000	BHD 401 – 1000
High	Over SR 15,001	Over KD 1001	Over DH 20,001	Over EGP 15,001	Over USD 4,001	Over OMR 1,001	Over BHD 1001

6. UNESCO Institute for Statistics, Measuring cultural participation, 2012
7. UNESCO, "Culture: a driver and an enabler for sustainable development", 2012
8. The United Nations Development Assistance Framework (UNDAF) is a strategic, medium term results framework that describes the collective vision and response of the UN system to national development priorities.
9. https://www.alliance-editeurs.org/re-shaping-cultural-policies-2018,1454?lang=fr
10. The World Bank, Mentoring the Creative Industries Sector in Kuwait, 2017
11. The Arabic word for culture *thaqafah* implies that somebody who is cultured would be very knowledgeable and well-read.
12. Suzi Mirgani, Introduction: Art and Cultural Production in the GCC, 2017
13. Helen Spencer-Oatey, "What is culture? A compilation of quotations" , 2012
14. Raymond Williams "On High and Popular Culture", 1974
15. On High and Popular Culture, Raymond Williams, 1974
16. The 14th instalment of Grand Theft Auto (an action-adventure video game series) launched in 2018 did $800 million in worldwide sales in its first 24 hours. That was the biggest launch day ever for any piece of entertainment–any movie, any record, anything at all.
17. Spotify premium, the paid subscription of the digital music service platform, is the first to have been subscribed by more than 100 million users worldwide, and is seeing a 32% year-on-year growth in subscription.
18. E. Schein, E. (1984), "Coming to a New Awareness of Organizational Culture", 1984
19. Helen Spencer-Oatey, "What is culture? A compilation of quotations", 2012
20. UNESCO Institute for Statistics, 2012 See Appendix 1
21. The 2009 UNESCO Framework for Cultural Studies provides a definition of culture which is based on a concept of cultural domains. These domains are: (A): Cultural and Natural Heritage; (B): Performance and Celebration; (C): Visual Arts and Crafts; (D): Books and Press; (E): Audio-visual and Interactive Media; (F): Design and Creative Services; Intangible Cultural Heritage (transversal domain). Related domains are: (G):

Tourism; (H): Sports and Recreation.

22. While the themes here are modeled around the UNESCO's classification and are focused on capturing site-specific engagement in culture, we have also captured non-site/digital engagement across these themes as a part of this study.
23. Wilson-Godie, Kaelen, On the Politics of Art and Space in Beirut, 2009
24. Vijaya Cherian, "Dubai to issue film permits in a day and offer e-option for aerial filming soon," 2019
25. Dominic Dudley, "Saudi Arabia Lifts Ban On Movie Theaters At Last," 2017
26. Abby Sewell, "Ravaged by War, Beirut's Historic Sites Are Being Reimagined," National Geographic, 2019
27. Part of Emirates Integrated Telecommunications Company (EITC)
28. Availability data used for the analysis is complementary to the data used in the "Cultural Vibrancy in Arab Cities" report published by Nuqat in 2019 (for common themes and cities).
28. Suchitra Bajpai Chaudhary, "Hakawati: the ancient Arab art of storytelling," 2014
30. From Taking Part Survey 2017
31. Department for Digital, Culture, Media, and Sport, 2018, 1
32. Please note that in light of the Covid-19 crisis in 2020, the survey was controlled for any presence of bias created by the pandemic. Responses are focused on the general state, looking past the impact of the virus.
33. Data is from The World Bank (2017-18)
34. Mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service. The indicator includes (and is split into) the number of post-paid subscriptions, and the number of active prepaid accounts (i.e., that have been used during the last three months).
35. Everette E. Dennis, Justin D. Martin, and Fouad Hassan, "Social Media," Media Use in the Middle East, 2019: A Seven-Nation Survey, 2019
36. The detailed methodology used for relative assessment of the three metrics is described in Annexure 1.
37. Unless otherwise stated, percentages expressed in this format denote the proportion of respondents from the city.
38. Please note that, unless otherwise stated, these responses have been controlled for public movement restrictions from the Covid-19 pandemic.
39. Art D'Égypte is a platform that aims to promote Egyptian art while highlighting and preserving the heritage sites.
40. Press Association, "These Are the Countries Where Office Staff Work Most Extra Hours," 2019
41. Jumana Khamis, "Sharjah, the Cultural Capital of the UAE," 2013
42. "Sharjah Named World Book Capital for 2019 by UNESCO," ArabianBusiness.Com
43. Hanadi Al-Balousi, "Kuwait keen on restoring cultural glory with construction boom," 2017
44. Despite high digital penetration in Oman, with 80% population having access to Internet.
45. The survey findings cover the cities of Dammam, Dhahran and Al Khobar.
46. This is a 17,000-square-meter space for the city's creative community, which includes galleries, clubs, an entrepreneurship incubator and a digital studio.
47. MDL Beast Festival was Niche Arabia client.
48. Shirin Jaafari, "Saudi Arabia's growing comedy scene," 2019
49. Bahrain Authority for Culture and Antiquities, "Investing in Culture Exhibition"
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51. For each site specific response, the numbers of responses for all sites under a theme were sum-mated to generate a response for the theme.

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