Gulf Research Center
Knowledge for All

GCC

SPORT SECTOR OUTLOOK

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GCC

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1. Executive Summary

The Gulf Cooperation Council (GCC) countries have strategically leveraged the power of sports to drive economic diversification, promote cultural change, and enhance their international reputation. This report delves into the dynamic landscape of the GCC sports sector, highlighting how Qatar and Saudi Arabia, in particular, have emerged as key players, steering investments and fostering change. We also examine the evolving priorities, policy reforms, and investment opportunities within the GCC sports sector, alongside the challenges. The GCC's sports sector promises a dynamic future with significant economic and cultural impacts.

The GCC countries recognize the multifaceted power of sports, from driving economic growth to fostering cultural exchange and international engagement. While challenges exist, the sports sectors in the GCC countries promise dynamic futures with significant economic, cultural, and societal impacts.

2. Introduction

Sports make substantial contributions to the economy by creating jobs, stimulating economic activity, and fostering tourism. One of the primary advantages is job creation, with the sports industry offering a wide array of employment opportunities. From professional athletes and coaches to event organizers, stadium personnel, and sports equipment manufacturers, numerous individuals find work in this sector. Furthermore, sports-related events, such as tournaments and matches, necessitate staffing, thereby boosting employment prospects.

Additionally, sports stimulate economic activity through the sale of tickets, merchandise, and broadcasting rights. Local businesses benefit from increased customer traffic on game days, enhancing their revenue. The construction and maintenance of sports facilities, such as stadiums and arenas, result in substantial investments that boost the construction industry and create jobs.

Tourism also receives a considerable boost from sports events. Hosting major tournaments and competitions attracts visitors from around the world, leading to increased hotel bookings, restaurant visits, and tourism-related spending. These economic benefits extend far beyond the sports industry itself, making sports a significant driver of economic growth in many regions.

Sports tourism significantly contributes to local economies, extending its positive impact beyond professional leagues to encompass youth and amateur sports like volleyball, baseball, and tennis. The presence of sporting venues in local communities attracts visitors, leading to increased economic spending and providing substantial benefits for private developers. The economic impact of sports tourism is multilayered, encompassing direct spending on accommodations, dining, retail, and transportation, as well as indirect spending on various goods and services. Moreover, it induces employee spending, further enhancing the economic boost. These investments are often facilitated through grants or the issuance of county and municipal bonds, making sports tourism a vital economic driver for numerous towns and cities.

The global sports market is undergoing transformative changes driven by various emerging trends. These trends are redefining how sports are experienced, monetized, and integrated with technology.

3. GCC Countries

3.1 Overview

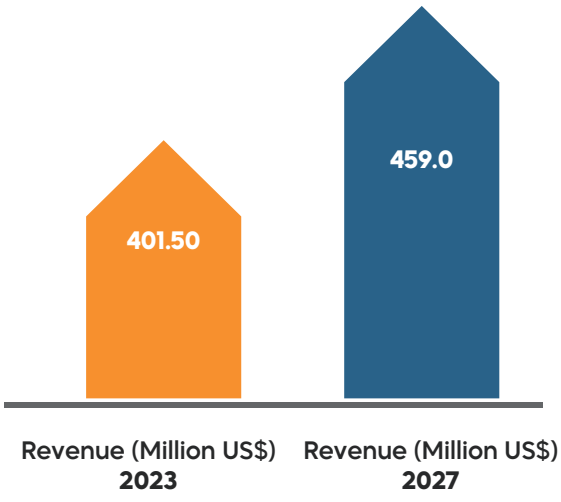
The Gulf states, through strategic investments in major football clubs have amplified their presence in the sports arena. The Qatar World Cup was a testament to this, with record attendance and memorable highlights. But football is not the only sport they have embraced. Since 2004, the region has hosted F1 races in Bahrain, Abu Dhabi, and Qatar. International tennis events like the Dubai and Qatar Opens have thrived for over 30 years. Additionally, MMA's prominence has surged, with Abu Dhabi recognized as a global Jiujitsu leader, hosting thousands for the Jiujitsu World Championship. The Gulf's sports evolution offers ample business opportunities in transport, hospitality, retail, and real estate, bolstering the region's sports tourism prospects.

The Gulf states boast top-tier training facilities attracting world-class athletes. These facilities cater to athletes globally with amenities from FIFA-standard pitches to sports science labs. This growth offers business opportunities in healthcare and well-being, especially in injury prevention and rehabilitation. As the Gulf becomes a premier training destination, opportunities arise for travel and accommodation packages for teams and athletes. Additionally, demand for constructing advanced sports infrastructures is set to rise. The UAE's long-standing emphasis on sports, evident since 1971, is reinforced by its National Agenda promoting societal cohesion and preserved identity.

The Gulf states have become a prime location for major sporting events. Beyond the World Cup, they host events like the Dubai Desert Classic golf tournament and the Dubai World Cup horse race. With diverse offerings, including the rising sport of padel tennis which will have the WPT Middle East Master in Abu Dhabi, the region caters to fans of all preferences. Boasting over 350 padel courts in the UAE alone, coupled with the UAE Sports Sector Strategy 2032 and investments in global sports, the Gulf is a hotspot for health and fitness entrepreneurs and investors.

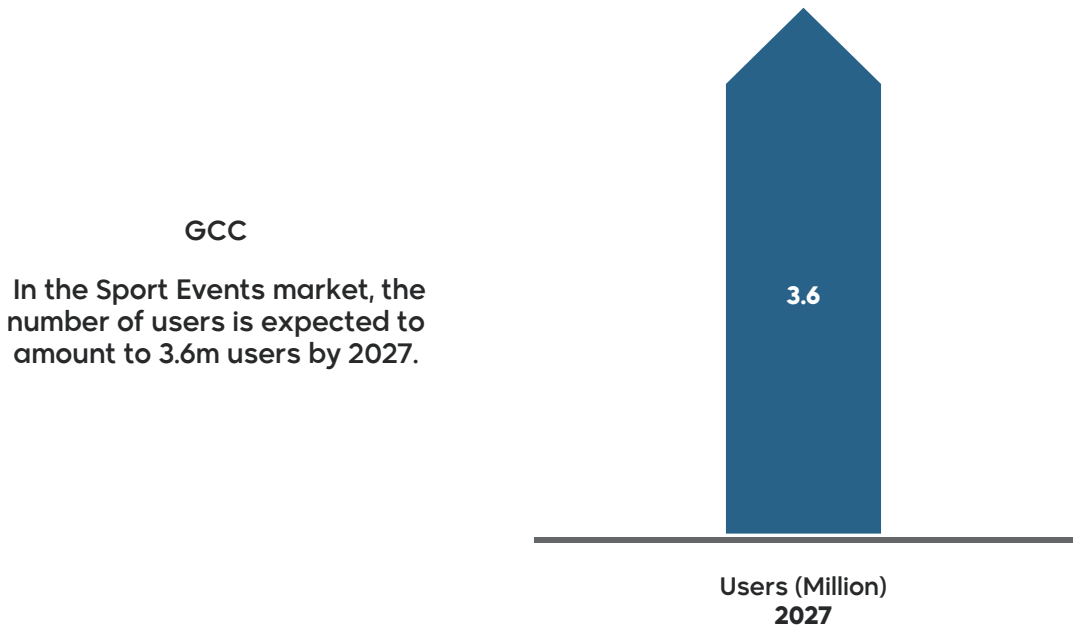
GCC total revenue in the sports events market

GCC total revenue in the sport events market is expected to show an annual growth rate (CAGR 2023-2027) of 3.40%, resulting in a projected market volume of US$459.00m by 2027.



Source: Secondary Research

GCC expected users in the sport events market



Source: Secondary Research

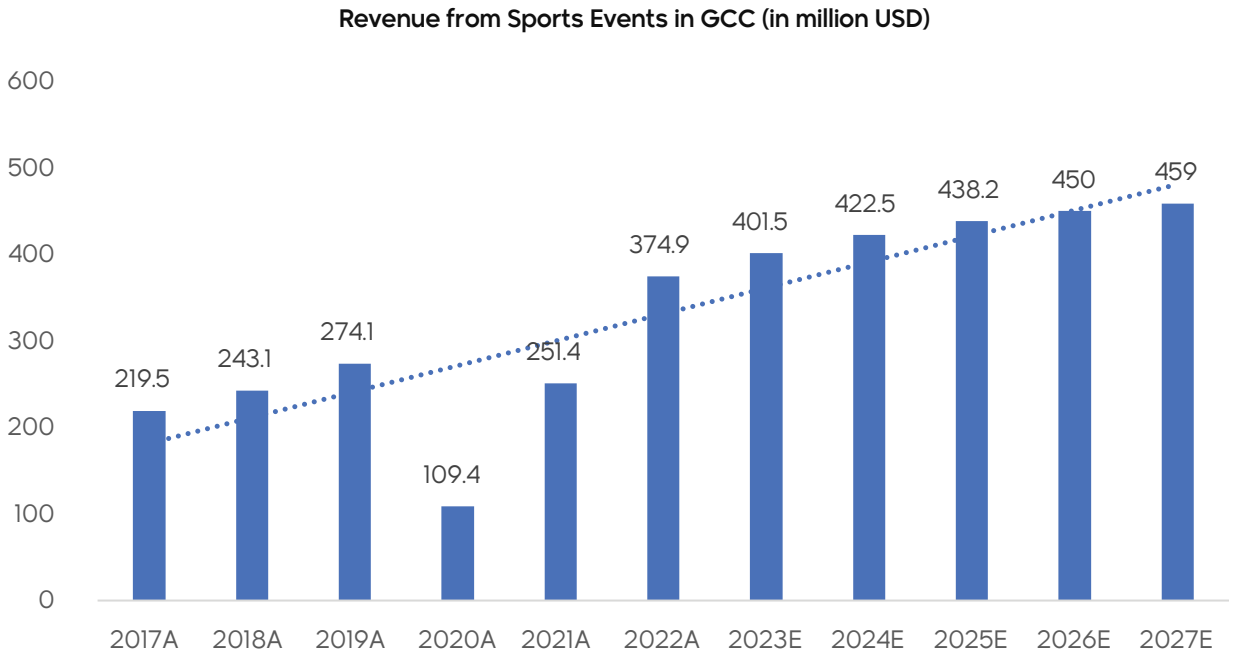
GCC's Sports Tourism Industry and the Evolving Sports Events Market

Sport tourism and the regional leisure industry have become increasingly important drivers for international arrivals to the GCC over recent years. Sport generates 25% of all tourism receipts globally, according to data from the World Travel and Tourism Council (WTTC), with 76% of trips, planned around a sporting event.

The Middle East, particularly the Gulf Cooperation Council (GCC) countries, has been experiencing an exciting surge in the sports market. This surge is exemplified by the monumental 2022 Qatar FIFA World Cup, which showcased the region's capability to host world-class sporting events. Furthermore, the GCC will continue to be a focal point on the global sporting map in 2023 as it hosts four Formula 1 races across Bahrain, Saudi Arabia, Qatar, and Abu Dhabi.

Many countries throughout the region host numerous sporting events such as grands prix, international golf tournaments, swimming, horse racing, sailing, tennis and cricket, with the UAE and Qatar leading the way. The GCC is ideally located for athletes from around the world to compete in a number of world-class sporting events. The region boasts the very best in sporting facilities and first class accommodation with excellent air links to major cities on every continent, encouraging international and regional competitors, officials and fans to participate.

As seen from the graph below, the revenue from Sports events in GCC is estimated to be about 459 million USD by 2027.



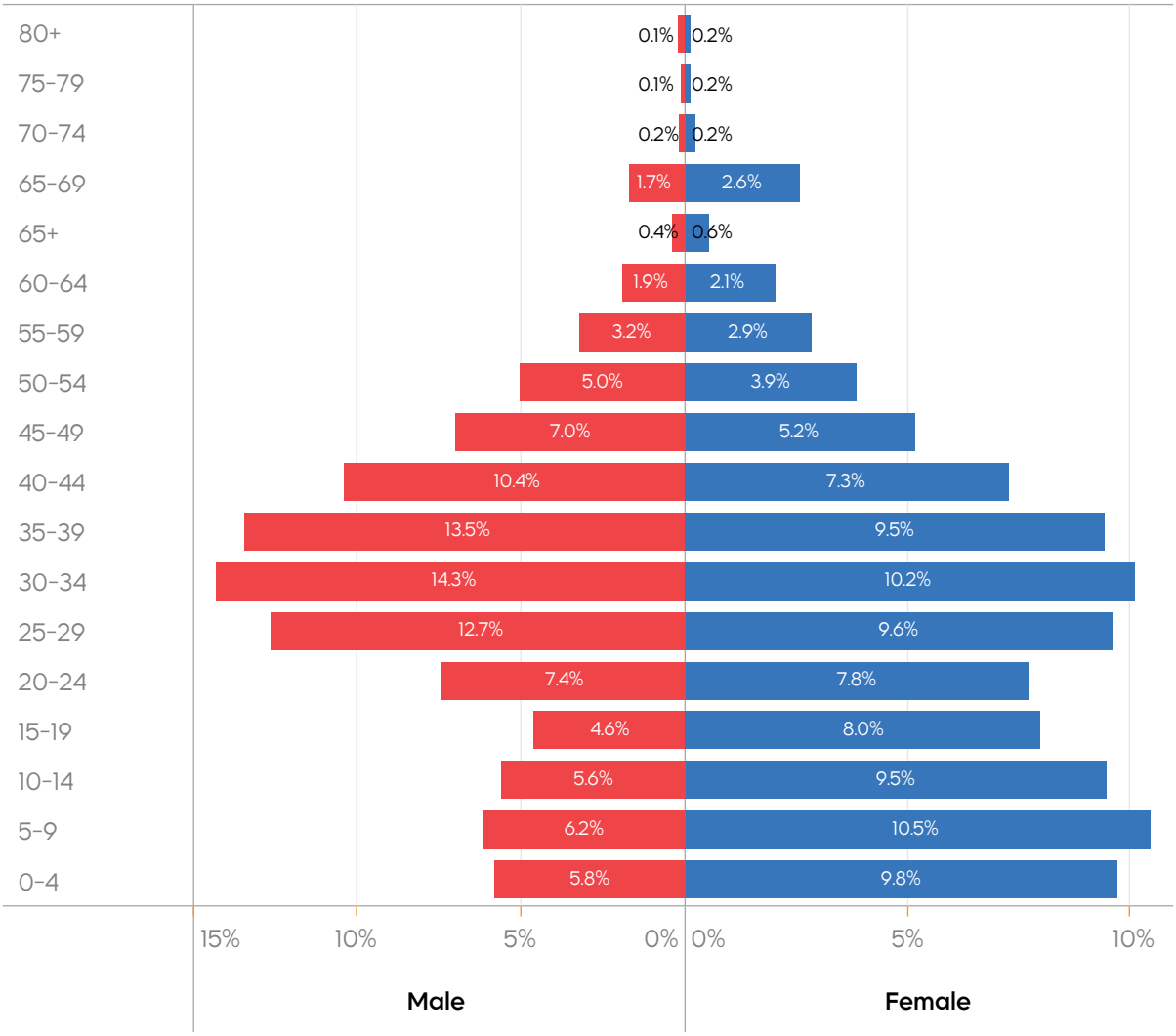
Source: Secondary Research
PS: The sports events market covers online ticket sales for professional events, encompassing a wide range of sports, both digital and paper tickets, and generating substantial revenue (in USD million).

3.2 GCC Countries Demography

The demographics of GCC (Gulf Cooperation Council) countries closely correlate with their fervent interest in sports, particularly football. The GCC countries have a median age that falls between 20 and 49 years, which is considered the prime age for physical activity and sports participation. This age group is typically associated with higher energy levels and enthusiasm for engaging in various sporting activities.

Approximately 75% of men in GCC countries are within the prime age range of 20-49, indicating a significant pool of potential sports enthusiasts. Likewise, around 62% of women in these countries fall within the age range of 10-45, suggesting a substantial female demographic interested in sports and physical activity.

GCC Population Pyramid



Source: GCC Stat

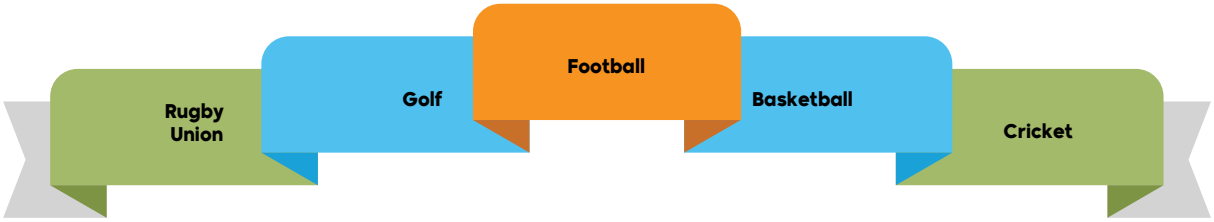
The historical affinity for soccer within the GCC nations has deep cultural roots, transcending mere entertainment to become a pivotal factor in shaping national identities. Football has played a pivotal role in fostering unity and pride, symbolizing a cultural bond within the region. For example, the establishment of the Arabian Gulf Cup in 1970, overseen by the Arab Gulf Cup Football Federation, underscores the role of sports as a mechanism for unification and solidarity among GCC countries.

This love for sports extends beyond football, with GCC states generously supporting the development of various sporting disciplines, including basketball, volleyball, tennis, golf, and padel, in recent years. This diversification reflects a broader interest in sports, catering to a wide range of preferences and demographics. In essence, the demographics of the GCC countries align seamlessly with their rich sports heritage, where sports are not just a pastime but an integral part of their cultural fabric, fostering unity and national pride.

3.3 Bahrain

Sporting history in Bahrain dates back to the early 1900s when the first football club was established. Since then, Bahrain has become a major player in the world of sports, hosting international events such as the Formula One Grand Prix and the Asian Games. The country has produced some of the world's greatest athletes, including Olympic gold & bronze medalist. In addition to individual achievements, Bahrain has also achieved success in team sports. The Bahraini national football team has won the Gulf Cup of Nations three times, and the Bahraini national basketball team has won the FIBA Asia Cup twice. The country has also hosted several major international sporting events, including the 2006 Asian Games, the 2011 World Athletics Championships, and the 2019 IAAF World Athletics Championships. Bahrain is also home to the Bahrain International Circuit, which hosts the Formula One Grand Prix.

Popular Bahrain Sports



Recent years have seen Bahrain's public authorities take substantial steps to make sports and recreational activities accessible to everyone. Policies and programs have been thoughtfully implemented across different governorates to ensure affordable activities for individuals of all backgrounds and abilities, with a particular focus on the youth. This includes the creation of neighborhood parks with sports facilities, the construction of sports stadiums, football pitches, multipurpose sports halls, Olympic swimming pools, youth centers, and youth sports grounds.

Building upon the strong foundation laid by the General Organization for Youth and Sports, Bahrain's Ministry of Youth Affairs, under the leadership of HH Shaikh Nasser bin Hamad Al Khalifa, works tirelessly to enhance access to sporting facilities and create an environment conducive to the aspirations of Bahrain's young generation.

Sports City Project

Bahrain's commitment to sports extends to the development of the largest Sports City in the country. This ambitious project aims to bolster youth and sports activities, foster innovation, and uphold excellence. The Sports City will include a 50,000-seat integrated sports stadium, training fields, athletic tracks, multi-use halls, individual game facilities, Olympic swimming pools, commercial complexes, hotels, parking lots, and a media center. It positions Bahrain as a prime destination for regional and global sports events.

Bahrain's investments in sports infrastructure and its unwavering commitment to inclusivity ensure that sports and recreation continue to play a vital role in the lives of its residents and

visitors. This vibrant sports landscape positions Bahrain as a destination of choice for athletes and sports enthusiasts alike. The nation's fervent passion for sports, combined with its remarkable infrastructure, cements its place on the global sports stage, hosting prestigious international events and nurturing future champions.

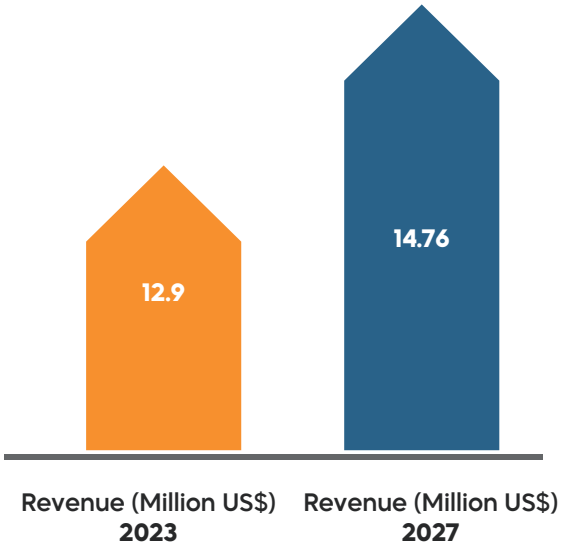
Major Bahrain Sports Events

Bahrain is a small island country in the Persian Gulf, and it has a rich history of sports and athletics. Some of the major, annual or traditional sports events in Bahrain include:

- Bahrain Grand Prix: This Formula One race is held annually at the Bahrain International Circuit in Sakhir. It is one of the most popular events in the country and attracts thousands of spectators from around the world.
- Bahrain International Marathon: This annual event is held in Manama and is one of the most popular marathons in the Middle East. It is a great opportunity for runners to experience the culture and beauty of Bahrain.
- Bahrain International Rally: This event is held annually in the desert of Bahrain and is one of the most challenging rallies in the world. It is a great opportunity for drivers to test their skills and experience the unique terrain of the country.
- Bahrain International Horse Racing: This event is held annually at the Bahrain International Racecourse in Sakhir. It is one of the most prestigious horse racing events in the region and attracts some of the best horses and jockeys from around the world.
- Bahrain International Football Tournament: This event is held annually in Manama and is one of the most popular football tournaments in the region. It is a great opportunity for teams to compete against each other and experience the culture and atmosphere of Bahrain.

Bahrain total revenue in the sports events market

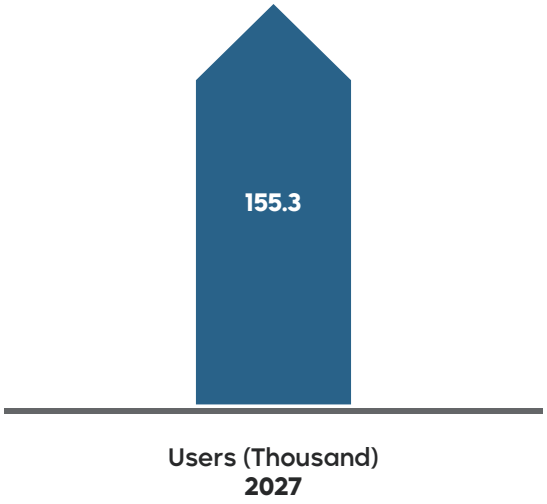
Bahrain total revenue in the sport events market is expected to show an annual growth rate (CAGR 2023-2027) of 3.42%, resulting in a projected market volume of US$14.76m by 2027.



Bahrain expected users in the sport events marke

Bahrain

In the Sport Events market, the number of users is expected to amount to 155.3k users by 2027.



Source: Secondary Research

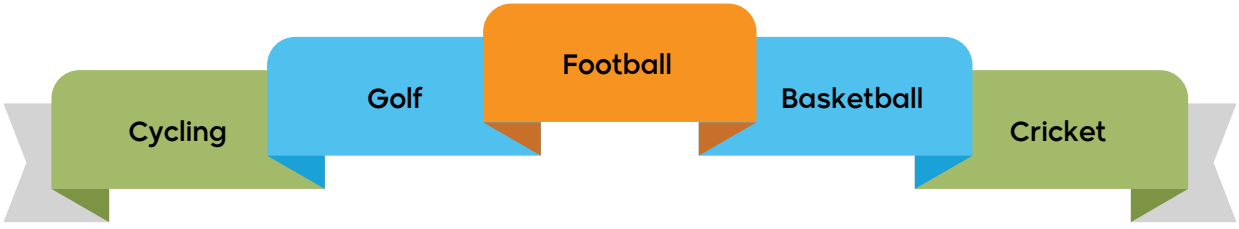
3.4 Oman

The sports industry in Oman is growing rapidly, with a variety of sports being played. The most popular sports in Oman are football, cricket, volleyball, basketball, and tennis. Other sports such as squash, badminton, and martial arts are also gaining popularity. The government is investing heavily in sports infrastructure and facilities, and the country is home to several international sporting events.

Oman has a long and proud sporting history. The country has produced some of the world's greatest athletes, including Olympic medalists, world champions, and national heroes. Oman has achieved great success in the sport of sailing, with the country's sailors winning multiple medals at the Asian Games and the World Championships. Oman has also achieved success in the sport of football, with the national team winning the Gulf Cup of Nations in 2009 and the Arabian Gulf Cup in 2018.

Oman has also produced some of the world's greatest athletes in other sports, such as tennis, athletics, and swimming. The country's athletes have won multiple medals at the Olympic Games, Asian Games, and World Championships.

Popular Oman Sports



The Ministry of Sports Affairs in Oman has outlined three main areas of focus, including promoting sports for all to create a healthy community, enhancing team sports to improve the country's regional and international standing, and using sports as a means of inclusive development.

The sports market in Oman is experiencing growth and development, with a focus on providing infrastructure and support for various sports activities. Here are some highlights:

- Sports Facilities Development: The Ministry of Culture, Sports, and Youth in Oman is actively involved in the development of sports facilities across the country. In Taqah, they have constructed a sports center with an international-sized artificial turf football field, seating for fans, reception hall, multipurpose halls, and administrative offices. This reflects a commitment to providing modern sports infrastructure. The Ministry's plan includes providing basic infrastructure for young people in different regions of Oman, demonstrating an emphasis on encouraging youth participation in sports and talent discovery.
- FIFA Forward Program[1]: Oman has received significant funding from FIFA through the FIFA Forward program, with nearly 95 percent of the funds utilized for the development of a technical center and accommodation infrastructure project. This project is intended to benefit various stakeholders, including national teams, referees, coaches, and clubs. Oman is set to receive substantial funding from FIFA Forward 3.0, with an expected grant of $8 million over a four-year cycle (2023-2026). This represents an increase in funding for football development in the country.

The government of Oman is actively working to diversify its sport sector and boost its contribution to the economy. Among the projects presented to investors, the most significant is the establishment of a multi-purpose sports hall in Muscat, with the capacity to host world championships and major international events. Additionally, investments are sought for a women's club in the capital city. Another noteworthy project is the development of a training center in Al Jabal Al Akhdhar, which will provide top-quality facilities, coaching, and services to support talented athletes in various sports disciplines. This initiative reflects Oman's commitment to promote sports and recreational activities. By attracting investments in these ventures, Oman aims to enhance its appeal to both domestic and international tourists and boost economic growth through sport-related activities.

Major Oman Sports Events

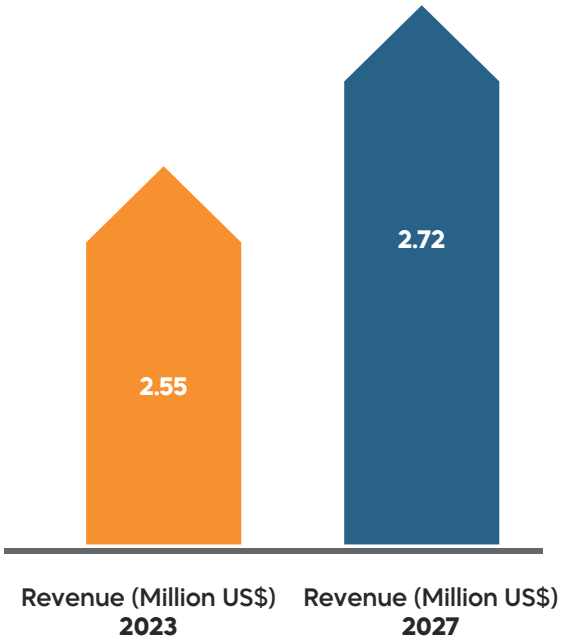
Oman is a country with a rich culture and a long history of sports. Some of the major, annual or traditional sports events in Oman include:

- The Muscat Marathon: This is an annual event held in the capital city of Muscat. It is a full marathon that attracts runners from all over the world.
- The Oman Open: This is an annual golf tournament held in Muscat. It is part of the European Tour and is one of the most prestigious golf tournaments in the region.
- The Oman Desert Marathon: This is an annual event held in the desert of Oman. It is a full marathon that attracts runners from all over the world.
- The Oman National Day Rally: This is an annual event held in the capital city of Muscat. It is a rally race that attracts drivers from all over the world.
- The Oman Sail Regatta: This is an annual event held in the coastal city of Muscat. It is a sailing regatta that attracts sailors from all over the world.

[1] https://timesofoman.com/article/132995-oman-football-to-receive-8mn-over-four-year-period-from-fifa

Oman total revenue in the sports events market

Oman total revenue in the sport events market is expected to show an annual growth rate (CAGR 2023-2027) of 1.63%, resulting in a projected market volume of US$2.72m by 2027.

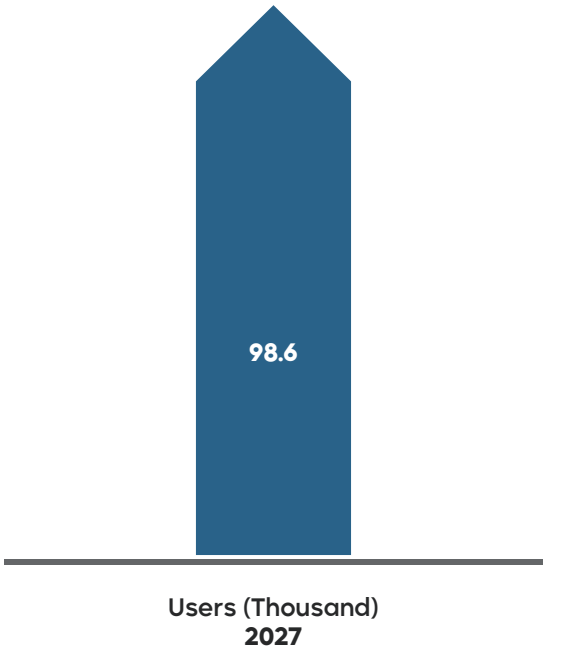


Source: Secondary Research

Oman expected users in the sport events market

Oman

In the Sport Events market, the number of users is expected to amount to 98.6k users by 2027.

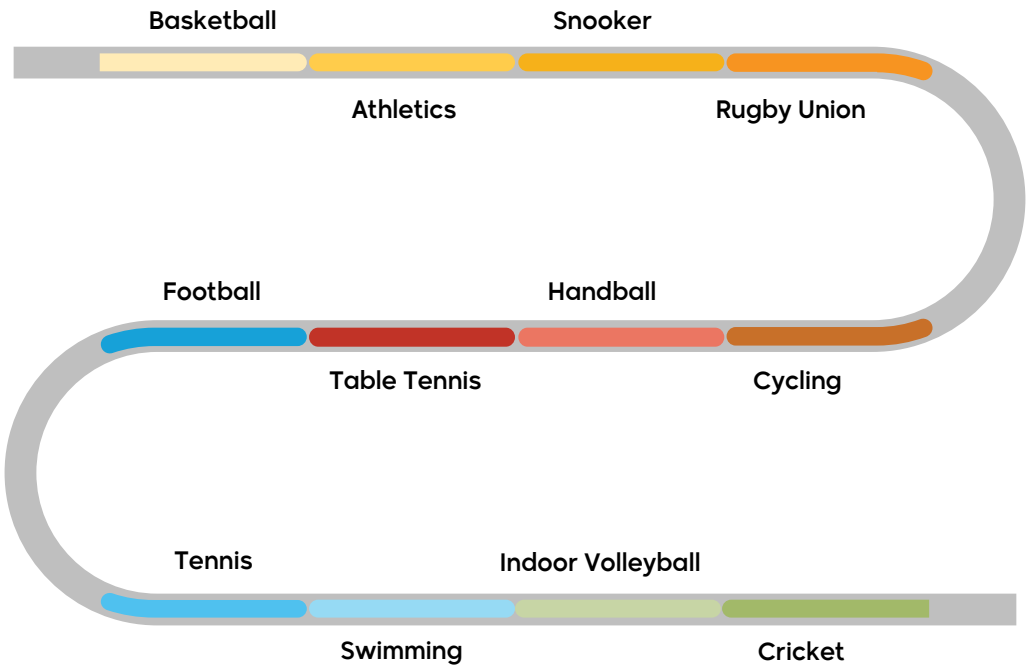


Source: Secondary Research

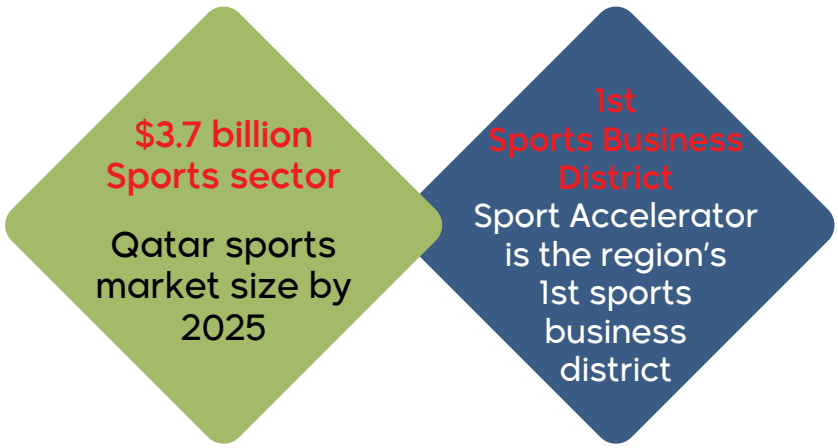
3.5 Qatar

The sports industry in Qatar is booming, with a wide range of sports and activities available. The most popular sports in Qatar are football, basketball, volleyball, handball, and athletics. Qatar is also home to a number of international sporting events, such as the 2022 FIFA World Cup and the 2019 IAAF World Athletics Championships.

Popular Qatar Sports



Qatar's sports sector has witnessed remarkable growth and transformation over the years, driven by strategic investments, ambitious initiatives, and a passionate commitment to becoming a global sporting



Source: Invest Qatar

Key Players in Qatar's Sports Sector

The main players in Qatar's Sports ecosystem are the Ministry of Sports and Youth, Supreme Committee for Delivery & Legacy, Qatar Olympic Committee (QOC), Aspire Academy, Qatar SportsTech and the Sport accelerator.

1. Ministry of Sports and Youth: Complementing Qatar National Vision 2030, this ministry focuses on promoting youth, developing talent, and expanding sports participation. It plays a vital role in coordinating sports-related efforts and supporting Qatar's emergence as an international sports hub.
2. Supreme Committee for Delivery & Legacy: Responsible for overseeing infrastructure projects related to the FIFA World Cup 2022, this committee aims to create a lasting legacy through its efforts in infrastructure development, education, and workers' welfare.
3. Qatar Olympic Committee (QOC): The QOC leads the Olympic movement in Qatar and is known for its innovative programs and initiatives. It collaborates with national federations to support athletes, coaches, and officials, all while using world-class sports events to inspire youth and promote sports.
4. Aspire Academy: Aspire Academy aims to be a global leader in youth athlete development. It contributes to methodologies in various sports and provides holistic development and support services, impacting the global sports academy network positively.

Qatar's sports sector is thriving, driven by a diverse range of initiatives, investments, and organizations. From hosting major events to supporting startups and nurturing young talent, Qatar is committed to becoming a global sports and leisure investment destination. As it continues to innovate and invest, Qatar's influence in the world of sports is set to grow, leaving a lasting legacy in the realm of athletics and beyond.

Major Qatar Sports Events

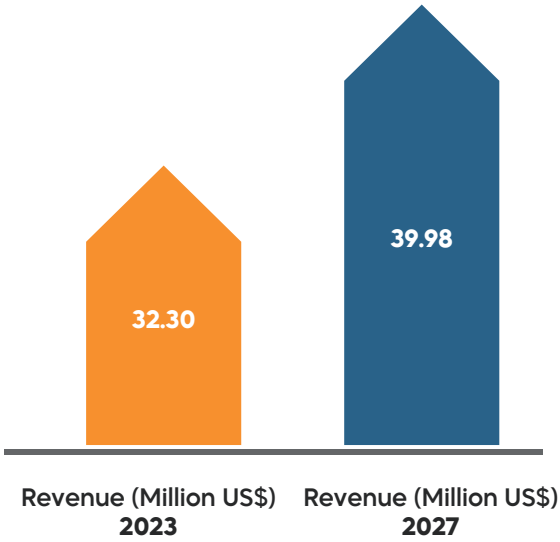
Qatar is home to a variety of traditional and annual sports events.

- The Qatar ExxonMobil Open is an annual men's tennis tournament held in Doha. It is part of the ATP World Tour 250 series and is one of the most prestigious tournaments in the Middle East.
- The Qatar Total Open is an annual women's tennis tournament held in Doha. It is part of the WTA Premier 5 series and is one of the most prestigious tournaments in the Middle East.
- The Qatar Masters is an annual golf tournament held in Doha. It is part of the European Tour and is one of the most prestigious tournaments in the Middle East.
- The Qatar Open is an annual squash tournament held in Doha. It is part of the PSA World Tour and is one of the most prestigious tournaments in the Middle East.
- The Qatar International Rally is an annual rally race held in Doha. It is part of the FIA World Rally Championship and is one of the most prestigious races in the Middle East.
- The Qatar Motorcycle Grand Prix is an annual motorcycle race held in Doha. It is part of the MotoGP World Championship and is one of the most prestigious races in the Middle East.

- The Qatar Classic is an annual badminton tournament held in Doha. It is part of the BWF World Tour and is one of the most prestigious tournaments in the Middle East.
- The Qatar International Handball Championship is an annual handball tournament held in Doha. It is part of the IHF World Championship and is one of the most prestigious tournaments in the Middle East.

Qatar total revenue in the sports events market

Qatar total revenue in the sport events market is expected to show an annual growth rate (CAGR 2023-2027) of 5.48%, resulting in a projected market volume of US$39.98m by 2027.

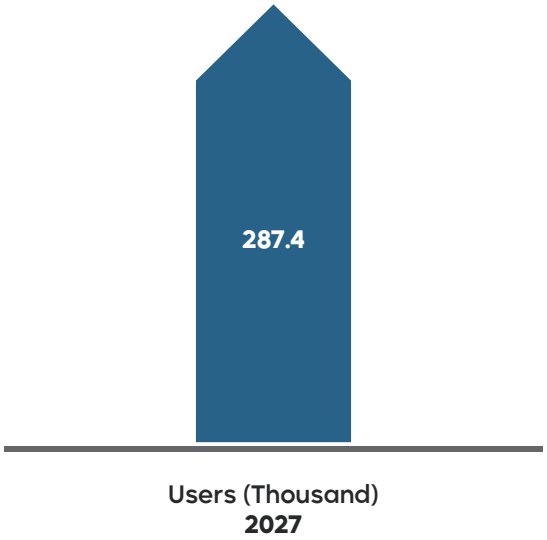


Source: Secondary Research

Qatar expected users in the sport events market

Qatar

In the Sport Events market, the number of users is expected to amount to 287.4k users by 2027.



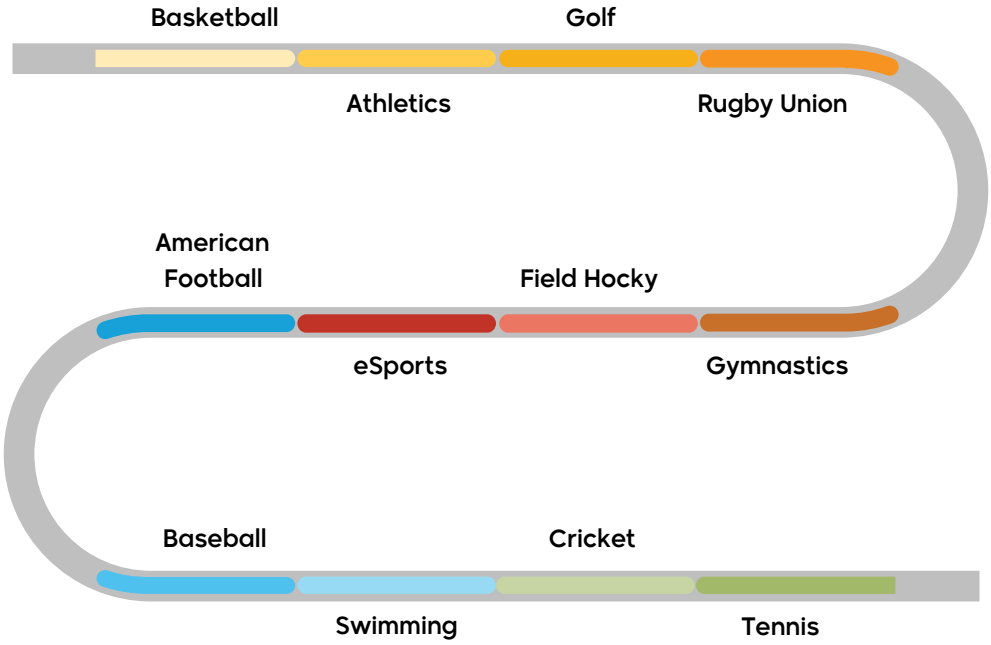
Source: Secondary Research

3.6 UAE

The sports industry in the United Arab Emirates is growing rapidly, with football, cricket, and tennis being the most popular sports. Other popular sports include basketball, volleyball, and rugby. The UAE has hosted several international sporting events. The country is also home to several professional sports teams, including the UAE Pro League and the UAE National Football League. The United Arab Emirates has a long and proud sporting history. The country has produced some of the world's greatest athletes.

The UAE has also achieved success in a variety of sports, including football, cricket, and motorsports. The UAE national football team has qualified for the FIFA World Cup on two occasions, in 1990 and in 2018. The UAE cricket team has won the ACC Trophy on four occasions, and the UAE motorsports team has won the FIA GT Championship in both 2009 and 2010.

Popular UAE Sports



The UAE boasts state-of-the-art sports infrastructure, including stadiums, equestrian clubs, golf courses, racetracks, and motorsport circuits. UAE has established free zone sports cities/ complexes to promote sports participation and development. These sports cities are mixed-use properties equipped with sports facilities, residential areas, commercial spaces, and more. Notable free zones include Zayed Sports City, Hamdan Sports Complex, Dubai Sports City, and Dubai Motor City.

[2]The United Arab Emirates (UAE) is embarking on a transformative journey to revolutionize its sports sector with the comprehensive Sports Sector Strategy for 2031. This strategy, founded on

[2] https://wam.ae/en/details/1395303173009:~:text=The%20new%20sports%20sector%20strategy,overall%20expansion%20of%20sports%20institutions.

three strategic pillars, aims to encourage active community participation, nurture sports talent, excel in professional elite sports, and expand sports institutions. Crucial to this initiative is the development of the UAE›s sports infrastructure, regulatory environment, and the elevation of Emirati sports at both domestic and international levels.

Key Initiatives

Seventeen core initiatives constitute the backbone of the Sports Sector Strategy for 2031. Among these, three transformative projects stand out prominently. The first is the establishment of a center dedicated to elite and high-level sports, which will serve as a hub for nurturing top-tier athletic talent. The second transformative project centers on modernizing sports federations, enhancing their efficiency and relevance in the modern sports landscape. The third critical aspect is the alignment of 14 strategic initiatives to support these transformative changes. These initiatives encompass a broad spectrum, including:

1. National Sports Survey: A comprehensive survey to gather valuable insights into the sports preferences, needs, and aspirations of the UAE's diverse population.
2. Innovative Sports Education: The development of contemporary sports education methodologies to ensure athletes receive world-class training and support.
3. Community Participation Frameworks: Creation of frameworks for community engagement in sports programs, promoting an active lifestyle across all segments of society.
4. Support for Gifted Athletes: Provision of funding and resources to nurture and elevate gifted and elite athletes, ensuring they have the support needed to excel on the global stage.
5. Athlete Career Development: Comprehensive programs to guide and support the careers of professional athletes, enabling them to reach their full potential.
6. Workforce Development: Training and development initiatives within the sports industry to enhance its professionalism and capacity.
7. Sports Coordination Council: Formation of a Sports Coordination Council to ensure sector-wide alignment and collaboration.
8. Development of Sports Laws: The formulation of a robust legal framework that governs the nation's sports industry, covering areas such as international sports relations, athlete well-being, and professionalism in sports.
9. Talent Discovery: Initiatives to identify and nurture sports talents at all levels, from grassroots to elite.

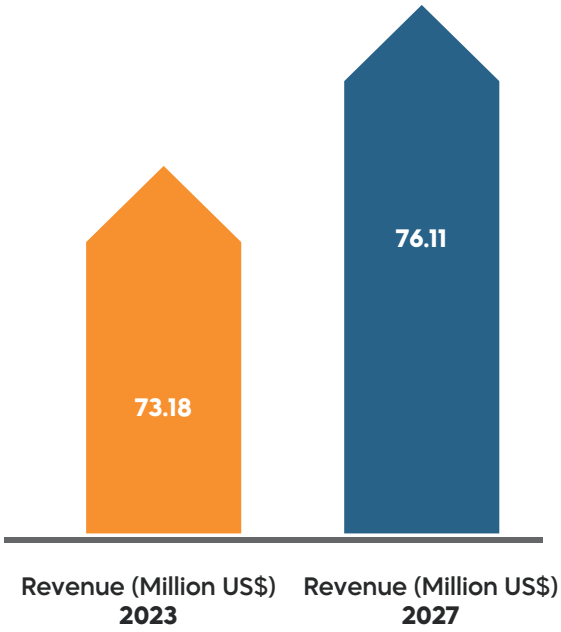
Major United Arab Emirates Sports Events

The United Arab Emirates (UAE) is home to a variety of traditional and modern sports events. The most popular annual sports events in the UAE include:

- Dubai World Cup: The world's richest horse race, the Dubai World Cup, is held annually at the Meydan Racecourse in Dubai. The event attracts some of the world's best horses and jockeys, and offers a prize purse of $12 million.
- Abu Dhabi Grand Prix: The Abu Dhabi Grand Prix is an annual Formula One race held at the Yas Marina Circuit in Abu Dhabi. The event attracts some of the world's best drivers and teams, and is one of the most popular events on the Formula One calendar.
- Dubai Desert Classic: The Dubai Desert Classic is an annual golf tournament held at the Emirates Golf Club in Dubai. The event attracts some of the world's best golfers and offers a prize purse of $2.5 million.
- Dubai Marathon: The Dubai Marathon is an annual running event held in Dubai. The event attracts thousands of runners from around the world, and offers a prize purse of $200,000.
- Dubai International Boat Show: The Dubai International Boat Show is an annual event held at the Dubai International Marine Club. The event showcases some of the world's best boats and yachts, and attracts thousands of visitors from around the world.
- Dubai Rugby Sevens: The Dubai Rugby Sevens is an annual rugby tournament held at the Sevens Stadium in Dubai. The event attracts some of the world's best rugby teams, and offers a prize purse of $1 million.

UAE total revenue in the sports events market

UAE total revenue in the sport events market is expected to show an annual growth rate (CAGR 2023-2027) of 0.99%, resulting in a projected market volume of US$76.11m by 2027.

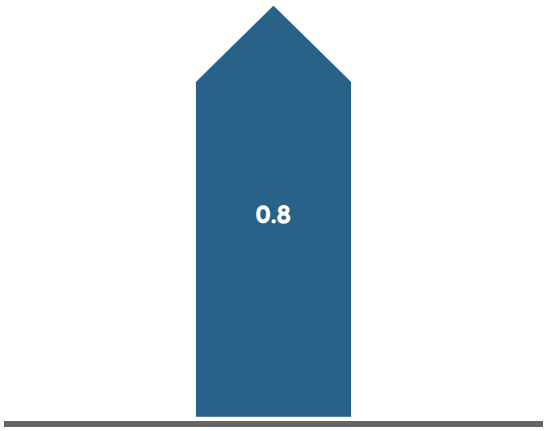


Source: Secondary Research

UAE expected users in the sport events market

UAE

In the Sport Events market, the number of users is expected to amount to 0.8m users by 2027.



Source: Secondary Research

3.7 Saudi Arabia

The Saudi sports market has embarked on a transformative journey, driven by the country's ambitious Vision 2030 and the National Transformation Program 2020 (NTP).

The Ministry of Sport in Saudi Arabia is dedicated to organizing and developing the sports sector comprehensively. Its mission includes enhancing the sports field, increasing the number of athletes, and achieving excellence on local and international stages. The vision is to create an athletic environment and a competitive sports arena.

The National Transformation Program 2020 (NTP) was launched as part of Saudi Vision 2030. It outlines 22 strategic initiatives aimed at achieving various objectives:

- Promoting sports and physical activities
- Improving the return on investment in sports clubs and facilities
- Fostering high-performance elite athletes

Notably, the NTP emphasizes the development of sports infrastructure at the grassroots level, with a focus on schools, women's sports facilities, and local communities. The goal is to increase community participation in sports from 13% to 40% by 2030.

In 2016, The Council of Economic and Development Affairs directed the establishment of a Sports Development Fund to support and invest in various sports initiatives. This fund aims to provide loans to sports clubs, promote sports events, privatize sports clubs, and create sports incubators.

In 2021, Saudi Arabia's Ministry of Sports has initiated a substantial SR10.1 billion ($2.7 billion) program to construct new sports facilities and upgrade existing ones over the next five years. This investment reflects the country's commitment to enhancing its sports infrastructure.

Popular Saudi Arabia Sports

Saudi Arabia has a long and proud sporting history. The country has produced some of the world's greatest athletes, including Olympic gold medalists. The country has achieved great success in international competitions, including the Olympic Games, Asian Games, and the FIFA World Cup. In 1984, Saudi Arabia won its first Olympic gold medal. In 2002, the country won its first Asian Games gold medal. In 2018, Saudi Arabia qualified for the FIFA World Cup for the first time and reached the Round of 16.

In addition, Saudi Arabia has won numerous medals in regional and international competitions, including the Arab Games, the Gulf Cup, and the Islamic Solidarity Games. The country has also hosted several major sporting events, including the Asian Cup in 1984 and the Gulf Cup in 1992.

The objectives of the Kingdom of Saudi Arabia in the field of Sports

The first theme

Increasing the percentage of sports practices and physical activities through:
- Providing innovative sports programs to expand the base of practitioners from all segments of society and develop the capabilities and energies of youth.
- Expanding the base of coaches and volunteers in the sports field.
- Enhancing the participation and contribution of Saudi women in the field.

The second theme

Creating a high-level competitive sport through:
- Empowering and governing sports bodies and raising their efficiency.
- Enhancing the role of sports media in consolidating the culture of sports and spreading its principles and values.
- Raising the level of Saudi attendance and representation in international sports arenas.

The Third theme

Expanding the efficiency and quality of sports facilities and facilities through:
- Enhancing the efficiency of managing sports facilities and facilities and improving the stadium environment.
- Good investment of the authority's sports and youth facilities.

The Fourth theme

Enhancing the financial sustainability of the sector and its contribution to supporting the national economy through:
- Create opportunities and an attractive environment for events and investment in the sector.
- Privatizing clubs and raising their competitiveness.

The Fifth theme

Developing institutional performance and establishing a culture of excellence, accountability, and transparency through:
- Improving the efficiency and productivity of employees.
- Raising the efficiency of programs and services.
- Establishing the principles of accountability and transparency.
- Strengthening partnerships with the three sectors (governmental, private and non-profit) to support sports projects and programs.

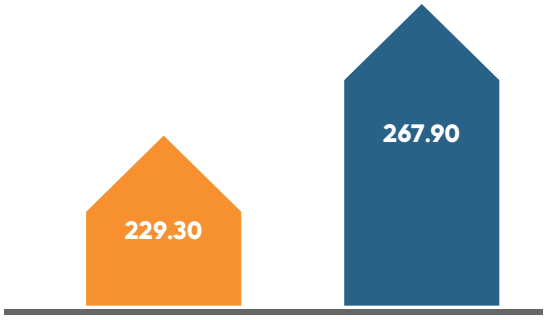
Major Saudi Arabia Sports Events

Saudi Arabia is home to some of the most prestigious sports events in the world.

- The Formula One Grand Prix is one of the most popular events in Saudi Arabia. The race takes place in the city of Jeddah and is held annually. The event attracts some of the world's best drivers and teams, and is watched by millions of people around the world.
- The World Cup is another major event in Saudi Arabia. The tournament is held every four years and is the most watched sporting event in the world. The country has hosted the tournament twice, in 1994 and 2002.
- The Asian Cup is a football tournament held every four years. The tournament is hosted by the Asian Football Confederation and is one of the most prestigious events in the region. Saudi Arabia has hosted the tournament twice, in 1988 and 1996.
- The Olympic Games is the biggest sporting event in the world. Saudi Arabia has hosted the event twice, in 1984 and 2012. The country has also hosted a number of other international sporting events, including the World Athletics Championships, the World Swimming Championships, and the World Handball Championships.

Saudi Arabia total revenue in the sports events market

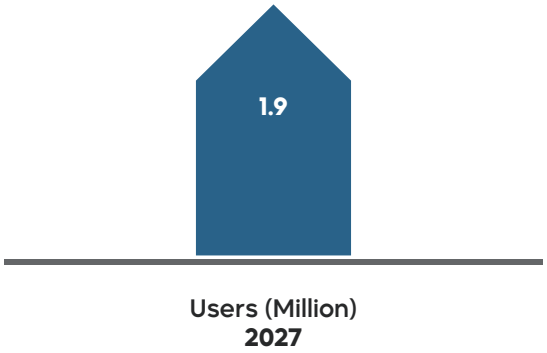
Saudi Arabia total revenue in the sport events market is expected to show an annual growth rate (CAGR2 023-2027) of 3.97%, resulting in a projected market volume of US$267.90m by 2027



Saudi Arabia expected users in the sport events market

Saudi Arabia

In the Sport Events market, the number of users is expected to amoun to 1.9m users by 2027.



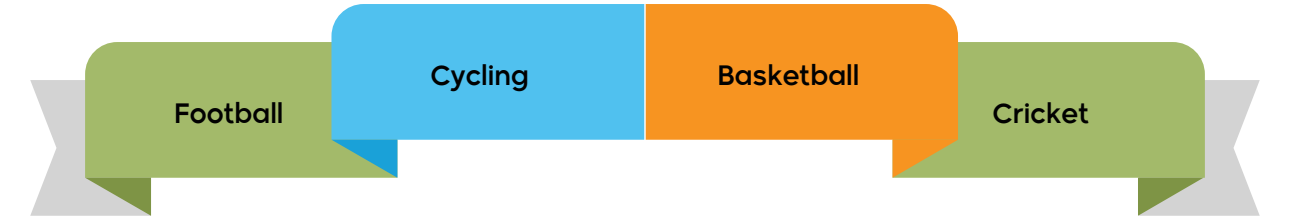
Source: Secondary Research

3.8 Kuwait

The sports industry in Kuwait is growing rapidly, with a variety of sports being played. The most popular sports in Kuwait are football, basketball, volleyball, and handball. Other popular sports include tennis, squash, and cricket. Kuwait also has a strong presence in international sports, with athletes competing in the Olympics and other international competitions.

Kuwait's sports ecosystem has undergone significant transformation and development over the years. This evolution has been shaped by a series of legislative changes aimed at enhancing the country's sports infrastructure, fostering talent, and aligning with international standards.

Popular Kuwait Sports



Kuwait introduced the General Sports Authority in 2015. This entity was designed to provide a dedicated framework for sports development. The General Sports Authority's objectives encompass expanding opportunities for collective sports participation, supporting young athletes, fostering a culture of fair competition, and combatting banned substances in sports. Additionally, it serves as a platform for showcasing Kuwait's cultural identity on the international sports stage. Kuwait's commitment to aligning with global sports standards has been a central theme in its sports legislation. The Sports Law (2017) explicitly emphasizes compliance with international standards, recognizing the importance of harmonizing Kuwait's sports laws with these global benchmarks. This commitment has allowed Kuwait to engage more effectively with the international sports community and demonstrate its dedication to upholding international sporting principles.

Kuwait unveiled the Public Authority for Sports' strategy for the years 2022-2028. This strategic plan focuses on harnessing resources and systems to promote sports activities, empower youth, and foster an organized sports environment. The strategy aims to instill values such as justice, equality, integrity, partnership, diversity, and efficiency, with key partners including the Olympic and Paralympic Committee, sports organizations, the government, private sectors, quality federations, the Kuwait Anti-Doping Agency, and the National Arbitration Authority.

Furthermore, the strategy envisions creating a sustainable sports environment that encourages continuous participation and excellence across generations. It includes initiatives like establishing a national sports day, building six sports stadiums in partnership with the private sector across governorates, developing an integrated Olympic sports city, and hosting numerous regional, continental, international, and global championships and courses. The strategy also encompasses plans for professionalism and sports education, the establishment of a sports scientific academy, and the inclusion of individuals with disabilities in sports organizations. Notably, it sets out a clear pathway for nurturing sporting champions and striving for Olympic and Paralympic success, starting from 2028.

Major Kuwait Sports Events

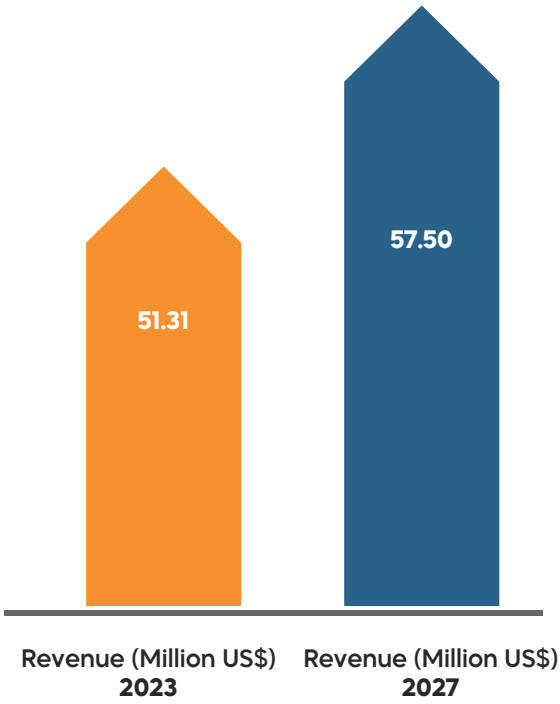
Kuwait is a country with a rich sporting culture, and there are many major, annual, and traditional sports events that take place in the country.

- The Kuwaiti National Day is celebrated with a variety of sporting events, including the Kuwaiti National Day Marathon, which is held annually in February. The marathon is a popular event, with thousands of participants from all over the world.
- The Kuwaiti National Football Cup is another major event, held annually in April. The tournament is open to all Kuwaiti teams, and the winner is crowned the Kuwaiti National Football Champion.
- The Kuwaiti National Basketball Championship is held annually in May, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Basketball Champion.
- The Kuwaiti National Handball Championship is held annually in June, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Handball Champion.
- The Kuwaiti National Volleyball Championship is held annually in July, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Volleyball Champion.
- The Kuwaiti National Swimming Championship is held annually in August, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Swimming Champion.
- The Kuwaiti National Athletics Championship is held annually in September, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Athletics Champion.
- The Kuwaiti National Wrestling Championship is held annually in October, and is open to all Kuwaiti teams. The tournament is highly competitive, and the winner is crowned the Kuwaiti National Wrestling Champion.

These are just some of the major, annual, and traditional sports events that take place in Kuwait. There are many more, including the Kuwaiti National Beach Volleyball Championship, the Kuwaiti National Table Tennis Championship, and the Kuwaiti National Chess Championship.

Kuwait total revenue in the sports events market

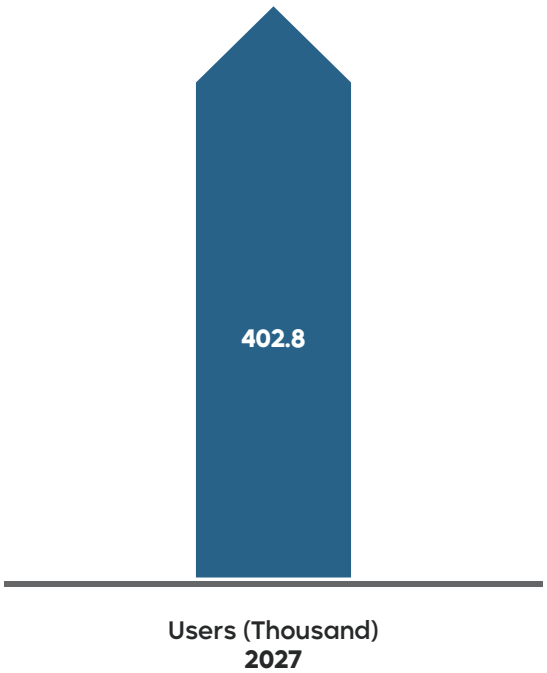
Kuwait total revenue in the sport events market is expected to show an annual growth rate (CAGR2 023-2027) of 2.89%, resulting in a projected market volume of US$57.50m by 2027



Kuwait expected users in the sport events market

Kuwait

In the Sport Events market, the number of users is expected to amount to 402.8k users by 2027



Source: Secondary Research

3.9 GCC Industry Drivers

Government Initiatives and Strategic Vision

The governments of the GCC nations have developed long-term strategic objectives to promote tourism and sport as a driver of their economies. They have initiated large-scale initiatives like Saudi Arabia's Vision 2030, which intends to modernize the travel, tourism and sport sector, attract more foreign visitors, and enhance the overall experience. Qatar National Vision 2030, another GCC

The Rise of Sports in Gulf States

Holding international athletic events has been one of the major drivers of tourism in the Gulf Cooperation Council. According to Arabian Business, Formula 1 Grand Prix races found a new home in the desert with the Bahrain International Circuit (BIC) opening in 2004. It was a historic moment, and ever since, the region welcomed more races, such as the Abu Dhabi Grand Prix (GP) in 2009 and the first Qatar GP at Losail International Circuit in 2021. Mixed Martial Arts (MMA) is a recent addition to the Gulf States' sports line-up. The UAE became a member of the International Mixed Martial Arts Federation (IMMAF) in 2021 and has hosted major MMA events for over a decade. The Emirates hosted over 7,000 competitors from 100 countries as part of the Jiujitsu World Championship in 2022. Apart from hosting Formula 1 Grand Prix races, Qatar is also benefited economically from the FIFA World Cup 2022, as the country's GDP increased with the retail and hotel industry expansion. Qatar hosts over 80 athletic events and world-class tournaments across various sports disciplines yearly. As the first Middle Eastern country to secure the rights to host the World Championships in Athletics (2019), World Corporate Games (2019), FIFA World Cup Qatar (2022), and FINA World Swimming Championships (2023), the country is gaining immense popularity in hosting sports events.

3.10 GCC Sports Industry Challenges

Climate and Weather

The extreme heat in many GCC countries poses a challenge for outdoor sports events and activities, particularly during the summer months. This can limit the time when certain sports can be played and requires substantial investments in cooling technology for stadiums and outdoor facilities.

Diversifying Sports Portfolio

Many GCC countries have historically focused on football (soccer) as the dominant sport. Diversifying the sports portfolio to include a broader range of sports is a challenge, but it can help engage a wider population and attract different types of events.

3.11 GCC Sports Industry Opportunities

Sports Infrastructure Development

- Stadiums and Arenas: Investment in the construction and modernization of sports stadiums and arenas offers potential returns through hosting international events and attracting large audiences.
- Training Facilities: Building world-class training centers and sports academies not only nurtures local talent but also attracts international teams for training camps.
- Sports Villages: The development of sports-centric residential communities equipped with integrated facilities can cater to athletes, coaches, and sports enthusiasts alike.

Professional Sports Clubs

- Ownership Stakes: Sovereign Wealth Funds can acquire ownership stakes in professional sports clubs, particularly football clubs, which can appreciate in value over time and generate revenue through various channels, including merchandise, ticket sales, and broadcasting rights.
- Sponsorships: Establishing long-term sponsorship agreements with sports clubs can provide valuable brand exposure and marketing opportunities.

Tourism and Business Opportunities

- The burgeoning sports industry in the GCC countries has created a wealth of opportunities for investors. The influx of sports enthusiasts has led to increased demand for transport, food services, real estate, and retail. Major sporting events also drive short-term property rentals and stimulate the hospitality sector, benefiting the overall tourism industry.

Gulf Research Center
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About the Gulf Research Center

The Gulf Research Center is an independent research institution, whose motto is "Knowledge for All." Its work serves the issues and goals of the peoples and countries of the Gulf region. The center was established in July 2000, and its headquarters are in Jeddah, Saudi Arabia. It has branches in Riyadh, Saudi Arabia, Cambridge University, United Kingdom, and Geneva, Switzerland.

Since its establishment, the Center has been committed to actively contributing to issues in the Gulf region, through all its activities, which include: conducting research and studies, organizing conferences, forums and workshops, media dissemination on security issues, politics, economy, military affairs, education and environment, media and others. The Center has also translated and published more than 500 major books, dictionaries and dictionaries specialized in politics, security, economics, international relations, strategic thought, environment, media, regional and international balance... etc.

For the twelfth consecutive year, the Gulf Research Center maintained its presence among the most prominent think tanks and civil society organizations in the world, and as one of the major independent think tanks in the Middle East and out of 8,162 organizations from all continents of the world, according to what was announced by the International Relations Program at the University of Pennsylvania on 30 January 2020, as a part of the program's annual classification of think tanks in the world. In addition, the Gulf Research Center was cited as one of the most prominent think tanks interested in foreign political and international affairs, and among the best institutions within the classification of institutional cooperation.

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