

AI at the heart of tourism and hospitality – powering personalisation, efficiency and growth

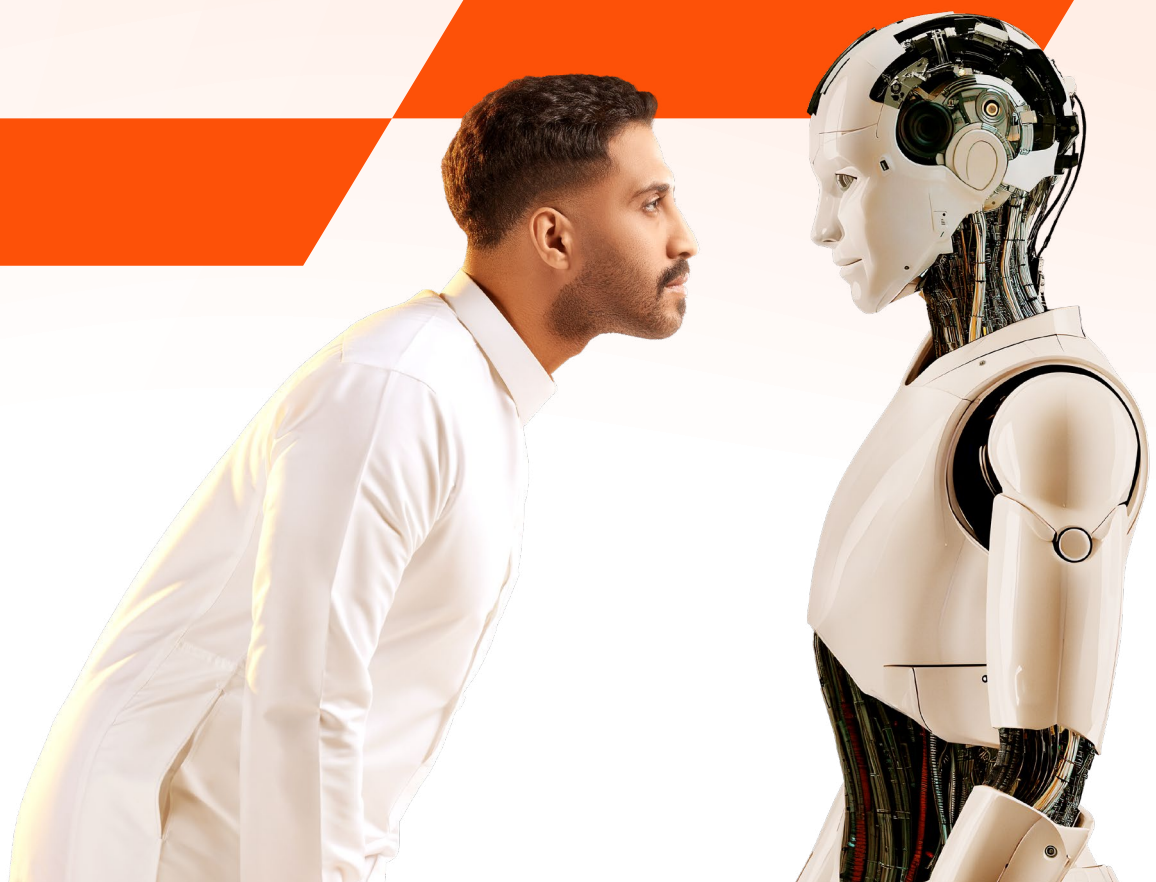


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01

Executive summary

As artificial intelligence (AI) moves from experimentation to necessity, it is redefining how the tourism and hospitality industry competes, operates and grows.

A strategic enabler of competitiveness, AI is driving efficiency, sustainability and innovation across the sector – transforming legacy systems, anticipating guest preferences and optimising performance in real time.

As the technology advances, it will power smarter, more responsive destinations that adapt dynamically to visitor needs, enhance resource management and deliver seamless, intuitive and memorable experiences.

Across the Middle East, countries are rapidly deploying AI and smart digital technologies to elevate visitor experiences and strengthen tourism and hospitality's contribution to national economic transformation agendas.

In Saudi Arabia, AI is central to Vision 2030's ambition of welcoming 150m annual visitors and increasing tourism and hospitality's share of GDP from 3% to 10%.¹

Similarly, the UAE is positioning itself as a global leader in AI-powered tourism and hospitality, using data and digital tools to enhance the tourism and hospitality experience, support secure data exchange, provide real-time insights for the tourism and hospitality sector, and strengthen sustainable smart city practices.²

To better understand the pace and direction of this transformation, PwC Middle East conducted a survey of C-suite and senior leaders from leading tourism and hospitality organisations across the region – representing hotel groups, investors, travel providers, digital platforms and government entities.

The findings reveal a sector in motion, where AI adoption is advancing but uneven:

91%

of respondents are already piloting or using AI

and

85%

report measurable gains in cost savings and efficiency.

Yet, only

3%

have achieved full-scale implementation.

The main obstacles

Legacy systems

85%

AI talent shortages

73%

Data privacy concerns

64%



This report examines the current state of AI adoption in tourism and hospitality, the operational challenges businesses are aiming to solve, the barriers to scaling and implementation and the AI solutions with the greatest potential to drive cost transformation, revenue growth and enhanced guest experience.

Across the tourism and hospitality ecosystem, AI's impact spans four critical areas: Guest experience, operations and data infrastructure, human resources and channel management – all converging on a single strategic outcome: reputation.

The insights from this study form the basis of a clear and actionable roadmap for AI adoption across three key stakeholder groups:

**Policy and destination stewardship**

Governments, regulators and DMOs shaping national tourism strategies.

**Operators**

Hotels, investors and management companies leading on-the-ground transformation.

**Intermediaries and enablers**

Travel agencies and digital platforms connecting service providers and travellers.

As the travel and tourism and hospitality sector heads toward 2030, AI stands at the core of its evolution, making journeys smarter, experiences richer and destinations more competitive. The future of AI in tourism lies not in replacing the human touch but in amplifying it – blending automation with authenticity to deliver more meaningful, memorable experiences.

Key findings



**Widespread adoption,
limited scale**

91%

of survey respondents are piloting or already using AI, yet only 3% have achieved full enterprise-wide implementation – highlighting significant potential for scaling.



**Proven
impact**

85%

report measurable improvements in cost savings and operational efficiency.



**Skills
gap**

73%

cite a shortage of employees with AI expertise or experience in managing digital transformation.



**Infrastructure
challenges**

85%

face difficulties integrating AI tools with outdated technology systems.



**Data and compliance
concerns**

64%

express ongoing challenges related to guest data protection and regulatory compliance.



**Focused
investment**

74%

of organisations now have dedicated AI budgets, signalling a shift from experimentation to structured, strategic adoption.



02

A sector in transformation – challenges and opportunities in tourism and hospitality

Tourism and hospitality face a perfect storm of disruption. Global institutions such as the OECD³ highlight headwinds such as rising costs and inflation, geopolitical uncertainty and environmental pressures as key constraints for the sector. While these forces create complexity, they also accelerate the need for innovation and resilience. In this environment, AI offers transformative potential by helping the industry reduce costs, generate revenue and reimagine the guest experience



PwC's analysis has revealed that the greatest opportunities for AI adoption cluster around four interconnected focus areas that shape the industry's future:

Guest experience



Operations and data infrastructure



Human resources



Channel management



Today's travellers are no longer satisfied with standardised offerings. They expect seamless, hyper-personalised and authentic experiences designed around their preferences. Yet many tourism and hospitality brands struggle to keep up. Rapid digital evolution has widened the gap between what guests want and what many operators can deliver. AI bridges this gap by analysing real-time data to anticipate needs, tailor interactions and deliver intuitive service. Used responsibly, AI can transform personalisation into an invisible advantage – enhancing loyalty, satisfaction and ultimately, brand reputation.

Guest experience

Meeting rising expectations



The sector continues to face a global talent crunch. Labour shortages, high turnover and widening skill gaps are stretching service quality margins. AI presents a powerful opportunity to empower people, not replace them. From adaptive learning platforms that tailor training to each employee, to predictive scheduling and workforce analytics, AI helps organisations build resilient, capable teams ready for a digital future. By embedding learning and development into daily work, tourism and hospitality leaders can transform their workforce from reactive to future-ready and engaged.

Operations and data infrastructure

Rebuilding the workforce for the future



Human resources

Competing in the age of AI agents

The digital landscape of tourism and hospitality is changing fast. Travellers now discover and book experiences through AI platforms and assistants, often bypassing traditional channels. This disintermediation creates risk for intermediaries and opportunity for operators. AI can help organisations stay visible and competitive by optimising pricing, managing reputation and strengthening online presence. Smart channel management is no longer just about distribution; it's about creating an integrated digital ecosystem where every guest interaction online becomes a data point that fuels continuous improvement.



Channel management

From fragmentation to intelligence

Behind every guest experience lies a web of operational systems – bookings, payments, customer data, logistics, many outdated and disconnected. These legacy systems limit visibility and slow decision-making, making it harder to extract value from data. AI can unlock operational excellence by connecting systems, automating processes and generating predictive insights. This shift from fragmented operations to intelligent, data-driven management allows for resource optimization, increased efficiency and elevation of front- and back-of-house experience.

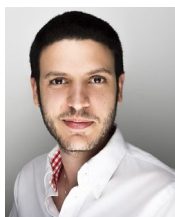


Reputation

Across all four focus areas, **reputation** emerges as the connective force – the ultimate reflection of how well organisations meet expectations, deliver value and build trust. It is both the outcome and the amplifier of success – shaped by every guest interaction, employee engagement and operational decision. AI enhances this dynamic by ensuring consistency, responsiveness and transparency – enabling brands to listen better, act faster and deliver with authenticity.



To realise AI's promise, the industry must move beyond pilots and proofs of concept. True impact comes when intelligence is woven into every decision – empowering teams, optimising systems and elevating experiences. The leaders who turn AI from a tool into an organisational mindset will shape the next era of tourism and hospitality.

**Moussa Beidas**

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03

Survey findings: a need for better integration



3.1 AI is foundational but not yet fully scaled

Our survey findings reveal that a significant 94% of regional tourism and hospitality leaders are already experimenting with AI, piloting specific use cases. This marks a decisive shift from exploration to early implementation. However, survey data also indicates that 71% of respondents have less than 3% of their annual budget allocated to AI-related initiatives – indicating that while AI is on the strategic agenda, it is not yet a major investment priority.

A closer look at adoption maturity shows that just over half (51%) of the respondents report on partial AI implementation, indicating that AI is present but not yet enterprise-wide. Another 40% are still in the pilot phase, rather than broad adoption – testing AI for specific use cases such as guest personalisation, predictive analytics or customer service automation. Only 3% have achieved organisation-wide AI deployment, underscoring a significant opportunity to scale proven pilots into broader business operations.



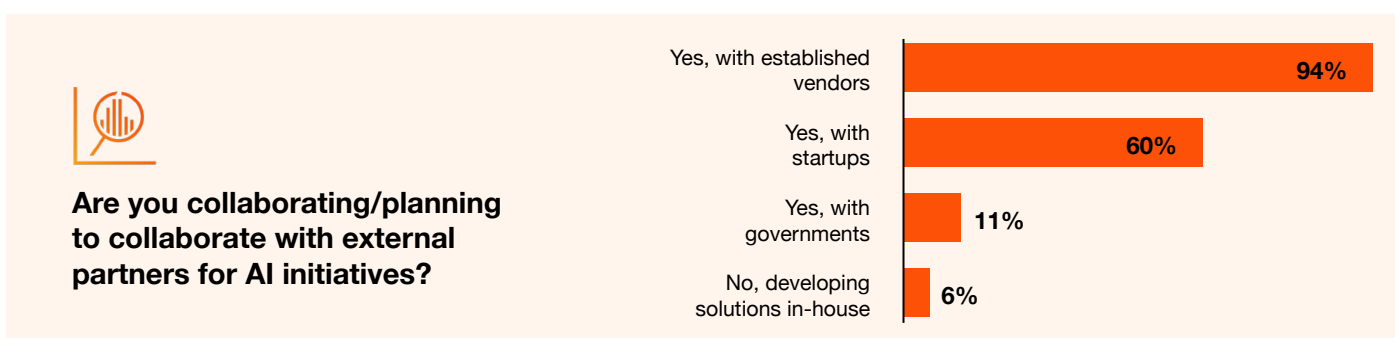
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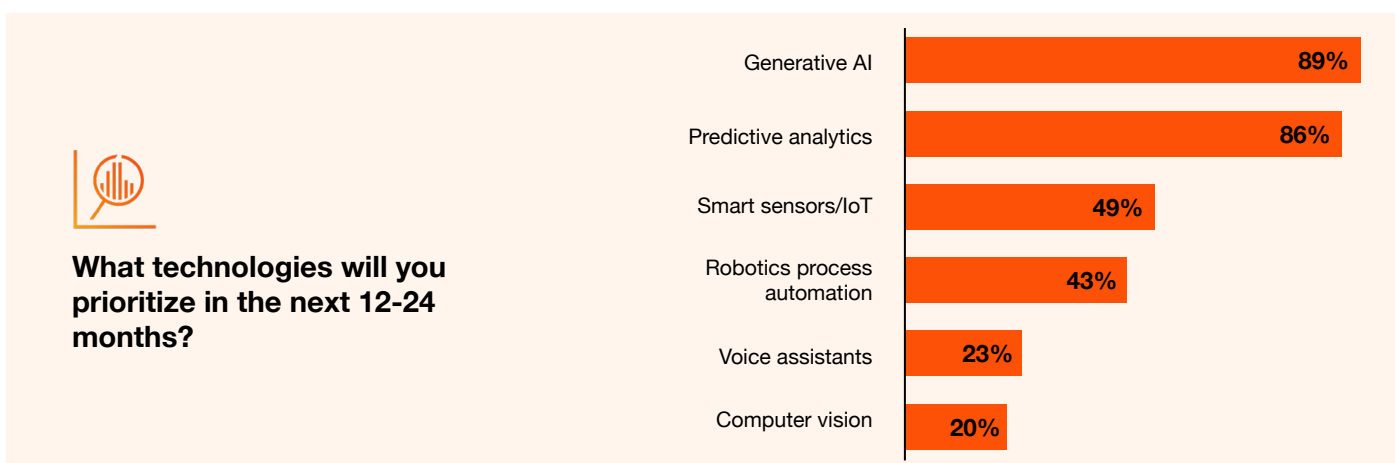
3.2 Intelligence is the new differentiator – how is AI being leveraged by leaders?

63% of respondents are using or planning to use AI embedded in core hotel systems. An almost equal number (60%) stated they are collaborating or planning to collaborate with startups on AI initiatives, while only 11% were working with governments indicating regulatory uncertainty and compliance hurdles.



Historically, most AI adoption in tourism and hospitality has focused on automation – streamlining repetitive tasks like check-ins, pricing updates or customer queries. Now industry leaders are prioritising Generative AI (GenAI), Predictive Analytics and Smart Sensors/IoT – indicating that businesses are now moving beyond efficiency gains toward intelligent decision-making and personalised guest experiences. It means hotels, resorts and travel operators will increasingly use AI to anticipate guest needs, personalise experiences and optimise operations in real time, rather than simply reacting to them.

According to survey findings, 89% and 86% of respondents will prioritise GenAI and predictive analytics in the next one to two years, respectively. While GenAI will enable hyper-personalised marketing and seamless service design; predictive analytics will refine demand forecasting and revenue management; and smart sensors will create more responsive, sustainable environments. Collectively, these technologies will redefine competitiveness in the region's tourism and hospitality sector – positioning the Middle East as a pioneer of intelligent, data-driven tourism experiences that blend operational excellence with the region's hallmark of exceptional service.



3.3 AI's impact on cost and revenue

When assessing AI's operational impact, 85% of respondents reported moderate to significant cost savings and efficiency gains. This aligns with findings from PwC's 28th CEO Survey Middle East, where 68% of GCC CEOs acknowledged improved efficiencies in their own time at work (vs. 53% globally) and 63% reported efficiencies in employees' time (vs. 56% globally).

When asked about AI's influence on revenue, only 3% of leaders found AI's transformational impact on revenues, 6% were well impacted, 39% reported moderate impact, nearly half (46%) were slightly impacted and 6% saw no impact on the company's revenues.

This disparity between cost and revenue outcomes highlights an important reality: AI's commercial upside in the tourism and hospitality sector is still developing, as most implementations are concentrated on improving efficiency rather than driving new revenue streams or guest-facing innovation.



85%

of regional tourism and hospitality leaders reported moderate to significant cost savings and efficiency gains from AI implementation



3.4 The primary drivers of AI adoption

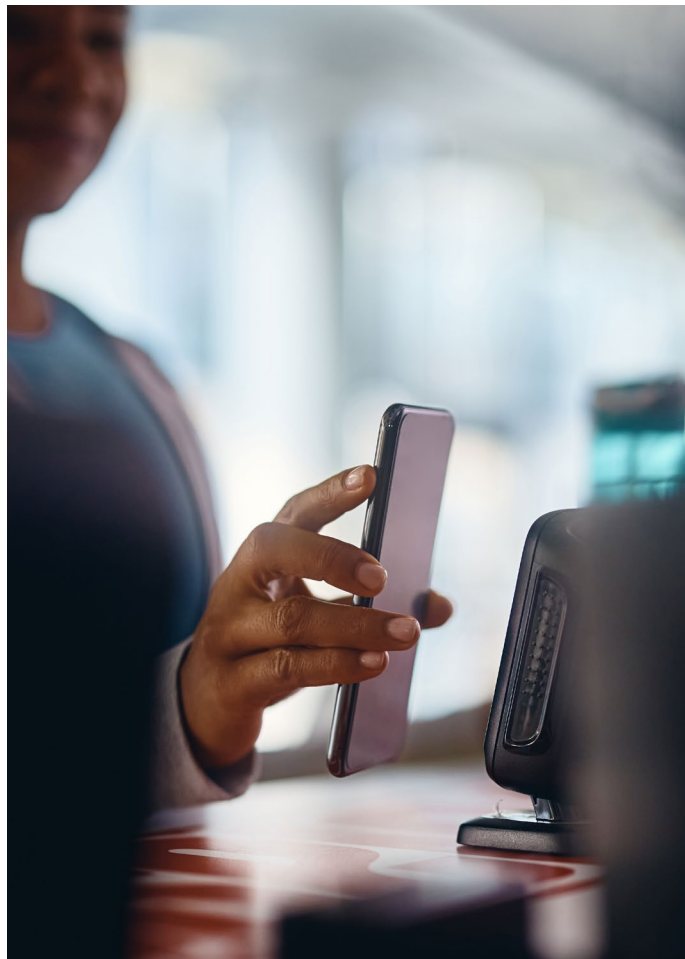
AI adoption in the tourism and hospitality sector is being driven primarily by a focus on enhancing the customer experience, with 97% of respondents citing it as their main motivation. This underscores the industry's commitment to personalising guest interactions through data-driven engagement in the region.

To create personalised, immersive and frictionless visitor experiences while supporting the Kingdom's broader economic diversification agenda, Kingdom of Saudi Arabia is rapidly advancing the use of smart technologies⁴ such as AI, augmented reality (AR) and virtual reality (VR). The use of intelligent systems helps anticipate and respond to travellers' needs in real time and marks a step beyond traditional digital solutions.

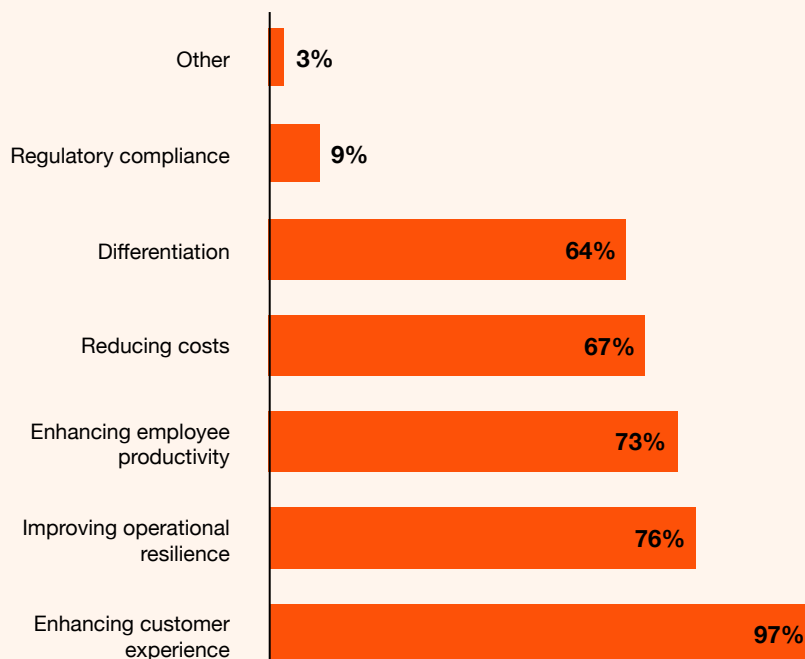
In the UAE, AI-driven personalisation, contactless check-in and mobile-first guest services are setting new benchmarks for speed, convenience and reliability. Successful hotel operators are unifying data, operations and staff around a clear digital vision.

Beyond guest engagement, over 70% of hoteliers identify operational resilience and employee productivity as key drivers, reflecting a growing recognition of AI's role in strengthening internal efficiency and workforce effectiveness.

Meanwhile, more than 60% of investors view AI as a means to differentiate from competitors, signalling its emerging role as a strategic lever for market advantage.



What is the main driver of you AI adoption?



3.5 Current AI use cases

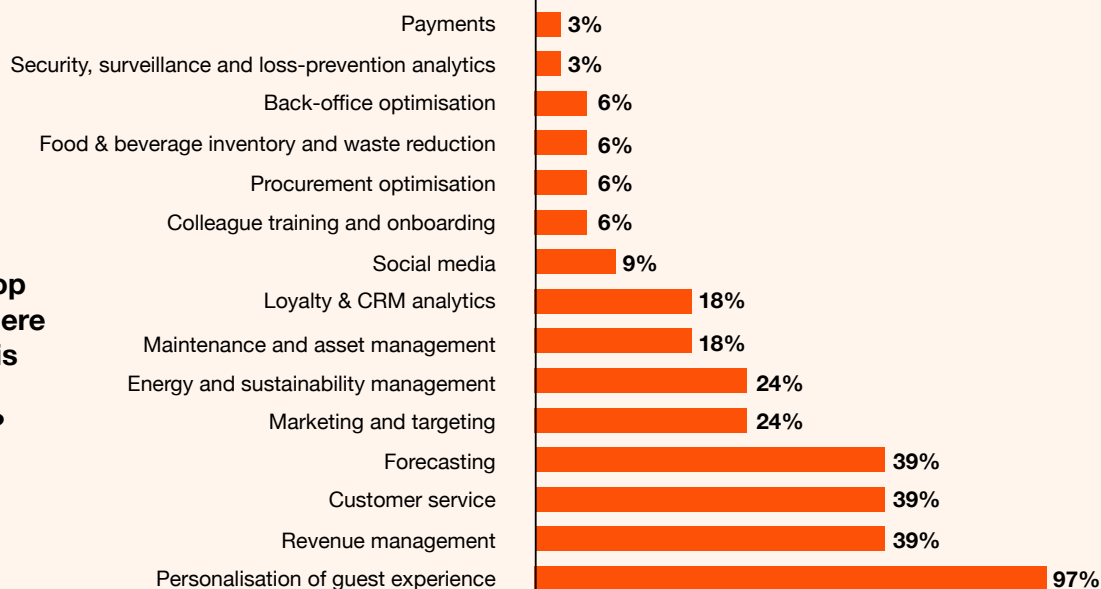
The personalisation of the guest experience emerges as the leading AI use case, cited by 57.6% of respondents. This reinforces the importance of personalisation as the cornerstone of AI-driven transformation in tourism and hospitality. Secondary applications such as forecasting, customer service and revenue management are gaining traction, with just under 40% of organisations prioritising these areas to optimise operations and improve decision-making.

However, the adoption of back-end and longer-term applications remains limited. Areas such as energy management, asset management, marketing and loyalty analytics – each register usage rates below 25%, highlighting an opportunity for the industry to expand AI deployment beyond guest-facing experiences. This uneven distribution suggests that while tourism and hospitality players are advancing in front-end digital engagement, the integration of AI into enterprise-level functions is still at an early stage of maturity.

Among these underused areas, asset management represents one of the strongest opportunities for value creation. AI has the potential to transform asset management from a manual, retrospective process into a predictive and strategic discipline. By integrating with systems such as PMS, POS, and accounting platforms, AI can automate reconciliation, flag anomalies, and deliver real-time performance insights. With integrated and standardised data, asset managers can shift from data collection to high-impact analysis, using AI to benchmark, forecast, and identify opportunities across portfolios. The result is greater efficiency, precision and asset performance, as managers focus on strategic, high-value decisions rather than spreadsheets.



What are the top three areas where AI is currently being used in your business?



3.6 Gauging the AI preparedness

When it comes to readiness, 80% of respondents report feeling moderately to well prepared for AI adoption, reflecting a broadly positive outlook toward integration. However, most organisations acknowledge existing capability gaps – including limited internal expertise, workforce readiness challenges and a need for clearer implementation frameworks.

A deeper look reveals that only 8% of leaders feel fully prepared for AI, while 11.5% consider themselves slightly prepared or not prepared at all. This split underscores a capability divide between organisations with established digital infrastructures and those still building foundational readiness. As a result, while enthusiasm for AI adoption is high, the journey toward full-scale implementation remains uneven, pointing to the need for targeted investment in skills, governance, and organisational change management to fully capture AI's potential.



80%

of regional tourism and hospitality leaders report to be moderately to well prepared for AI adoption, with the majority most acknowledge existing capability gaps as a challenge



3.7 Barriers to scaling

Despite growing enthusiasm for AI adoption, the tourism and hospitality sectors face significant structural and capability barriers that constrain scalability and impact. The most frequently cited challenge is integration with outdated legacy systems, reported by 85% of respondents. These legacy platforms limit the ability to process data in real time and hinder seamless deployment of AI solutions across operations – a foundational issue that must be addressed for the sector to progress toward full AI maturity.

Talent shortages remain a close second, noted by 76% of respondents. The industry continues to struggle with a widening skills gap, high turnover among digital professionals, and limited investment in upskilling. Without dedicated strategies to attract, retain and develop AI expertise, hotels risk becoming overly dependent on external vendors, which 64% of organisations already view as a growing concern. Overreliance on vendors not only inflates long-term costs but also threatens innovation continuity if in-house technical capabilities are not developed.

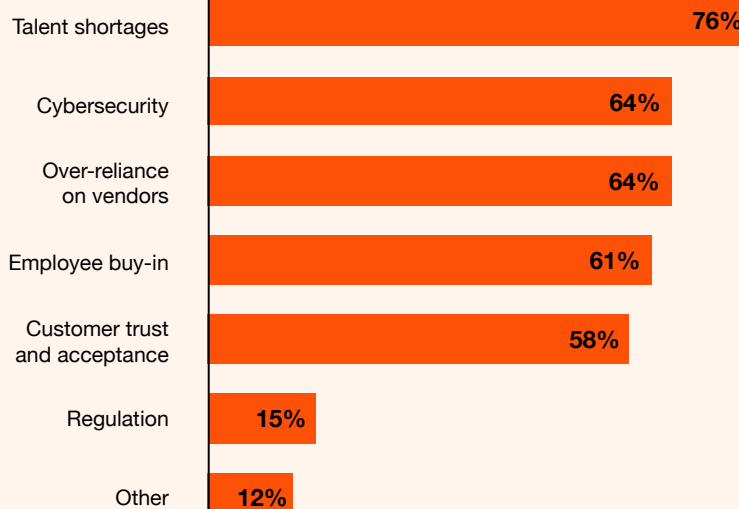
Workforce capability is, therefore, critical to AI adoption. Survey findings highlight that a significant 60% of respondents dedicate between 10-25% of their AI budget to upskilling employees – indicating that technology investment alone is not enough without equipping employees to work effectively with AI.

Cybersecurity and data privacy risks, cited by 64% of respondents, further complicate adoption, reflecting heightened sensitivity around guest data and regulatory compliance. Employee buy-in (61%) and customer trust (58%) also emerge as critical soft barriers, underscoring the importance of change management and transparent communication around AI use. Meanwhile, budget limitations (46%) and lack of AI strategy alignment (42%) represent moderate but persistent challenges, highlighting the need for stronger strategic integration between business and technology functions.

Interestingly, regulatory barriers appear less important, cited by only 15% of respondents, indicating that the main hurdles to scaling AI are internal rather than external. Collectively, these findings reveal that technology investment alone is insufficient – true progress depends on modernising infrastructure, building human capability and embedding robust data governance frameworks to ensure AI delivers measurable, sustainable value.

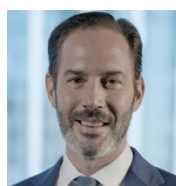


What are the issues you foresee in scaling AI in your organisation?





AI is redefining how destinations, hotels and travellers connect. The winners won't be those who collect the maximum data, but those who use it intelligently – to make every interaction seamless, ethical and valuable. For industry leaders, this means moving from disconnected systems to connected intelligence, where AI doesn't replace human judgment and interaction, but amplifies it to create trust, efficiency and new forms of value across the entire travel ecosystem. Also requiring a re-think on what kind of talent is hired, and how they integrate AI in creating and delivery experiences.



Marco Rentsch

Hospitality Leader,
PwC Middle East

04

Avoiding the pitfalls: What not to do when implementing AI

The integration of AI is set to transform, not replace, the human workforce in tourism and hospitality. A significant 77% of respondents believe that AI will create new roles and job functions over the next five years, signalling a shift toward more collaborative human-machine models with employees increasingly responsible for overseeing, managing and optimising AI systems to ensure accuracy and alignment with guest expectations.

This evolution is also reflected in the 91% of respondents who anticipate a human role transformation toward higher-value tasks. As AI takes over repetitive and routine activities, tourism and hospitality professionals will have more capacity to focus on creativity, emotional intelligence and personalised guest engagement – areas that define the human touch and cannot be replicated by machines. In this case technology will enhance, rather than diminish, the central role of people in delivering exceptional guest experiences.



AI projects in tourism and hospitality usually fail on integration, alignment and execution, not algorithms.

Don't treat AI as an add-on. AI is not a plug-in to existing workflows, it reshapes them.

Result

Organisations that only automate tasks instead of redesigning processes see no measurable return on investment.

Avoid

Implementing isolated tools (chatbots, dashboards) without aligning them to strategic KPIs, operating models and decision-making routines.

Don't build AI around weak foundations. AI delivers little value when organisations test solutions before modernising the foundations they depend on.

Result

Disconnected systems, low data quality, poor integration, and models that can't scale or deliver measurable impact.

Avoid

Treating integration as a technical afterthought or choosing technology before mapping data gaps, integration needs, and user workflows. AI depends on clean, centralised, and interoperable data, with scalable tools aligned to business KPIs from day one.

Don't overlook human readiness. Technology adoption fails when people don't trust or understand it.

Result

Resistance, misuse or underuse of AI insights.

Avoid

Rolling out systems without building internal capability, cross-functional collaboration and clear communication about the value AI delivers.

Don't scale without a governance plan. Scaling AI requires structure, not momentum.

Result

Organisations and businesses that expand without governance face inconsistent results, data risks and declining team adoption.

Avoid

Rolling out AI across markets or departments without defined ownership, data privacy controls and clear upskilling plans. Establish accountability before expansion.





The opportunity with AI isn't 'code' for replacing people, but in empowering them with intelligence that deepens human connection, anticipating guest needs, optimising what already works, and building more resilient, sustainable solutions. The industry's evolution will depend on how effectively we align technology with purpose, data with empathy, and innovation with authenticity. Furthermore, as operations become smarter and more efficient, hotel investment will strengthen in both financial sustainability and long-term value creation; a dialogue that continues to shape our conversations across FHS.

Jonathan Worsley

Chairman & CEO,
The Bench - Organisers of
the Future Hospitality Summit

05

What do leaders in tourism and hospitality need to think about?



5.1 Smarter channels. Stronger reputation

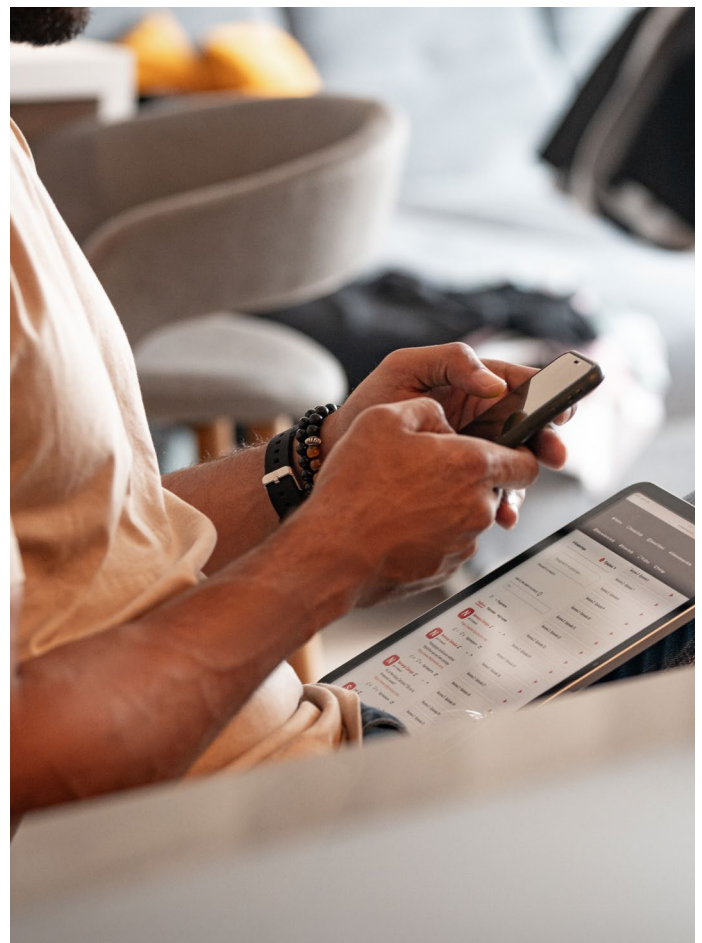
Booking that adapts, not depends

AI will be able to connect hotel systems directly with travel platforms and digital assistants, not as one more intermediary but as a unified ecosystem. Imagine a guest asks their AI companion for a boutique hotel that is pet friendly, with breakfast options and flexible checkout. Instantly, only hotels with real-time and readable data will appear, bypassing slower intermediaries as a result.

The future distribution will not be built through commission dependency, but through direct, AI-powered booking experiences that map guests to properties seamlessly.

Application programming interface (API)-first architecture will make connections smarter. It unlocks AI-driven distribution, dynamic pricing and unified reputation monitoring, creating competitive advantage through seamless connected intelligence.

As AI reshapes distribution, operator leaders should question: What data to trust, which systems to connect first and where human judgement still matters. Decision-makers at companies that act as intermediaries between hotels and guests should also reassess their business models. They should ask whether their business model must evolve to remain relevant and create long-term value in an increasingly AI-driven ecosystem.



5.2 Guest experience is transforming – now what?

Seamless intelligence that anticipates without being intrusive

One hotel lets guests hang their laundry in the closet facing the hallway; the housekeeping team is automatically alerted and clothes are returned before they ask. That's personalisation done right: invisible and intuitive. Hyper-personalisation must be anchored in consent, transparency and context, ensuring guests feel understood, not observed.

The path forward isn't knowing more about guests, it is using better data to make their experience seamless. It should be high-impact, low-risk. Start small: identify low-hanging opportunities with high-quality, reliable data that deliver visible impact. Then reinvest the gains to scale what works.

The future of guest experience won't be defined by who has the most data, but by who uses it with the most intelligence and restraint. For operators, the priority is turning guest data into actionable insight without crossing the line between personalisation and privacy. For government and tourism entities, the focus should be on establishing clear data standards and ethical frameworks that protect travellers while enabling innovation. Those who master this balance will secure not only guest loyalty, but lasting trust in the tourism and hospitality ecosystem.



5.3 Legacy systems won't be dropped – so what changes now?

Practical intelligence that moves the needle

True transformation starts small. Making legacy systems obsolete may not be realistic and is not necessary to gain from AI. For instance, it can be used to optimise housekeeping schedules not by introducing new systems but by feeding existing data into analysis. The result is cleaner rooms, lower costs and happier guests without any system overhaul. That's the blueprint: use what you already have but use it smarter. Identify “low-hanging” opportunities where high-quality, well-governed data drives measurable results. The future is about connecting legacy infrastructure intelligently and not about scrapping it.

Leaders should focus on the three golden rules for a successful AI implementation:



High-impact:

Start where better data directly drives revenue or efficiency.



Low-hanging fruit:

Tackle projects that can show ROI quickly



High-quality data:

Ensure information is clean, relevant and decision-ready

When these three rules align, AI becomes a business multiplier rather than just a buzzword. The next phase of digital maturity lies in using today's insights to finance tomorrow's innovation. Tourism and hospitality leaders – whether destination management organisations (DMOs), government, hotel owners, operators or intermediaries – who master data enablement before data replacement will know precisely where to invest next and why.



5.4 Learning that adapts, not ends

The act of learning is timeless. What changes are the ways of learning

AI-enabled training, adaptive microlearning and data-driven development paths must be embedded as continuous learning models into daily operations. Digital mentors can guide employees on this shift and AI-driven recommendations that map internal career paths. The future workforce will not be built through recruitment, but through renewal, turning learning into a seamless part of daily work life.

Hiring new talent is not the only solution to persisting labour shortages. For instance, hotels must identify “sleeping talent” – employees with related or untapped skills – by using AI tools to identify internal candidates before looking outside. Your next AI talent may be working in housekeeping. This shift requires connected HR data, performance analytics and learning systems that expose growth potential in real time. Start small: choose one role with high turnover, map existing skills and build internal mobility around it. This results in low disruption with measurable impact.

The question isn't how to fill positions faster, but how to make every role a development opportunity. For operators, the priority is to build internal learning ecosystems that identify and grow talent continuously. For government entities, the challenge is to create incentives, partnerships and frameworks that make lifelong learning in hospitality a national capability, not just a corporate initiative. The leaders and policymakers who treat learning as infrastructure will define a workforce that is agile, loyal, skilled and future-ready.





AI is transforming how people discover, experience and remember destinations. It's enabling travel that is more seamless, sustainable and personal – where data creates connection and technology amplifies authenticity. The future of tourism and hospitality will belong to those who use intelligence to deepen, not digitise, the human experience.



Nicolas Mayer

Partner Middle East Tourism,
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Is your organisation AI ready?



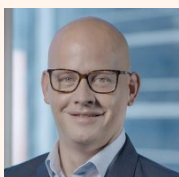
AI.Upskill by **PwC Academy** is a multidimensional solution designed to build AI confidence and fluency across industries, functions and levels. It helps organisations empower employees at every level, equip leaders to integrate AI into strategy and tailor learning journeys that deliver measurable results.



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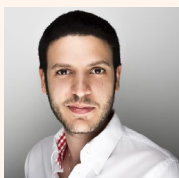
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To know more, contact us

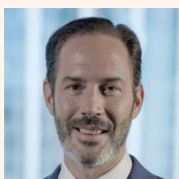
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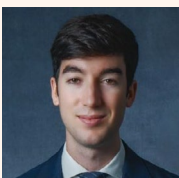
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