



Stay, Play, Shop: Shaping integrated destinations for connected visitor experiences



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Introduction

From functional spaces to experiential ecosystems

Destinations have traditionally been valued based on physical assets - often measured in square footage or footfall. But today, value is being increasingly defined by how well a place connects with visitors, how it invites them in, makes them feel and gives them a reason to linger and return.

Across the Gulf Cooperation Council (GCC), destination development is undergoing a fundamental shift. Cities and districts are no longer defined by size, skyline or signature events, but by their ability to create meaningful, memorable experiences that connect people with places.

Driven by a new generation of visitors and accelerated by ambitious national agendas, regional destinations are pioneering a model that blends asset development with experience-led design, integrating culture, entertainment, sports, education and hospitality into seamless, human-centred ecosystems.

In the region, destination offerings are rapidly diversifying beyond traditional anchors. New developments now include heritage and cultural districts, waterfront leisure and hospitality hubs, sports and wellness cities, innovation and education clusters and immersive entertainment-driven experiences. The focus is shifting from simply building infrastructure to curating environments where culture, recreation, learning, wellness and entrepreneurship converge to shape the visitor journey.

This is where 'Stay, Play, Shop' evolves from a planning concept into a strategic blueprint - one that guides the creation of connected destinations. These are environments that seamlessly integrate accommodation, experiences and retail, bringing to life a compelling and cohesive visitor journey. In a region like the GCC, defined by mixed-use ambitions and rising visitor expectations, it offers a clear answer to a timely challenge: how do you create places that people do not just visit, but feel part of?

At the heart of this transformation, ‘Stay, Play, Shop’ offers a simple structure with layered depth:



- **Stay**

anchors identity and belonging



- **Play**

activates interaction and memory



- **Shop**

transforms transactions into meaningful moments

Developed in collaboration between PwC Middle East and travel intelligence service provider Mabrian, this report brings together a strategic perspective on the evolution of destinations. It combines visitor insights with a placemaking lens to explore how destinations in the GCC can unlock value by designing experiences with visitors at the centre.

In the sections below, we outline how ‘Stay, Play, Shop’ can help destination development companies, tourism entities, destination managers and operators shape spaces that are economically resilient and emotionally resonant. We explore what today’s visitors really value, how the framework comes to life through placemaking and what it takes to turn built environments into meaningful, memorable experiences.



Understanding the connected visitor: A strategic imperative

Designing connected destinations begins with understanding the visitors they want to attract and cater for. This means shifting focus to understanding visitors' behaviour, intent and emotional drivers - the deeper reasons behind how visitors choose, move through and remember a destination.

Today's visitors come with higher expectations and more diverse motivations. They are less interested in checking off landmarks and more invested in how a place makes them feel - connected, curious, comfortable or inspired. These evolving mindsets are not abstract; they are visible in travel and spend data, and increasingly, in the way visitors engage with GCC destinations.



To create spaces that resonate and perform, developers and destination leaders must design and operate for these new expectations. We anticipate three major behavioural pivots:

2.1 From passive to purposeful visits

Visitors are no longer content to simply see a destination. They want to understand it, feel part of it and take something meaningful from it. Whether driven by wellness, culture, spirituality, or nature, today's journeys are shaped by intent - not just by location.

This shift is pronounced across the GCC. According to Mabrian's data and based on tourist mentions on Instagram reflecting levels of interest in different tourism products - arts and culture emerge as the leading travel motivator in Qatar (28.5%), UAE (26.6%) and Saudi Arabia (24.5%) - outpacing shopping, beach activities and gastronomy. Visitors are seeking places that reflect local identity and values and that invite participation rather than passive observation.

Key takeaways:

Destinations should consider moving beyond surface-level attractions, offering curated, purpose-driven experiences that align with visitors' drivers and motivations for their visit and allow them to feel part of the story.

The growing focus on experience diversity is also reflected in the top interests expressed by visitors in each country, highlighting unique opportunity areas for destination development:



Saudi Arabia

- **24.5%**
Arts and Culture
- **17.3%**
Active Lifestyle
- **15.8%**
Nature
- **12.2%**
Food and Cuisine
- **8.7%**
Family Activities



United Arab Emirates

- **26.6%**
Arts and Culture
- **13.2%**
Active Lifestyle
- **12.6%**
Food and Cuisine
- **10.9%**
Shopping
- **9.8%**
Beach



Qatar

- **28.5%**
Arts and Culture
- **21.1%**
Active Lifestyle
- **10.6%**
Nature
- **8.6%**
Food and Cuisine
- **8.1%**
Family Activities

Note: The percentage shows the visitors' top five areas of interest in each of the listed countries



2.2 From planned itineraries to fluid journeys

The connected visitor prefers freedom over formality. Itineraries are becoming more flexible, shaped by curiosity and convenience rather than rigid plans. This is particularly relevant for intra-GCC visitors, who often design multi-stop, short-format journeys built around moments of interest.

In the UAE, visitor behaviour strongly reflects this shift. According to Mabrian's analysis of a leading global online travel platform, Dubai and Abu Dhabi are not only the top two most visited destinations in the GCC, but they also form the top three most popular itineraries among international visitors. These include: Abu Dhabi to Dubai, Dubai to Abu Dhabi and round-trip journeys that start in Dubai, continue to Abu Dhabi and return to Dubai. These patterns indicate that visitors are actively curating flexible, return-based trips that span both cities, taking advantage of the short distance and efficient intercity connectivity.

In response to these evolving behaviours, destination management companies are offering bundled experiences that blend culture, leisure and entertainment across both cities, meeting the growing demand for more integrated and dynamic journeys.

Abu Dhabi and Dubai together exemplify how destinations can thrive by complementing one another within a shared visitor journey, one that flows across cities, formats and touchpoints.

Key takeaways:

To support this behaviour, destinations are expected to offer interoperable, connected experiences - with shared infrastructure, mobility links and adaptable programming that enables visitors to flow seamlessly between places and formats.



2.3 From luxury to meaningful interactions

The definition of premium is evolving. While traditional luxury still has its place, visitors are increasingly seeking authenticity, autonomy and emotional relevance - especially across younger and regional audiences.

This evolution in what constitutes 'premium' is also reflected in where and how visitors choose to stay across the region.

Across the region, visitor preferences in 2024 reflected a clear shift toward diversified and purpose-driven accommodation choices.

- In Saudi Arabia, the overall average occupancy rate reached 55.4% in Q2 2024, reflecting year-on-year growth, according to the General Authority for Statistics (GASTAT)¹. While five-star hotels led with 36.0% of bookings, the rise of value-conscious travel was evident, three-star and below hotels captured 35.0% of bookings and alternative accommodations like hotel apartments and vacation rentals saw family bookings surge by 90.0% and group bookings grow by 60.0%². This signals a strategic pivot toward more affordable, flexible lodging among families and groups.

- In Qatar, according to the Qatar Tourism Annual Performance Report 2024, occupancy performance revealed a clear preference for apartment-style and budget-friendly accommodations, pointing to a shift in visitor priorities. This was evident in how hotel apartments led all categories with 74.6% occupancy, followed by 3–1 star hotels at 70.2%, while 4-star hotels recorded 69.0% and 5-star hotels trailed at 63.7%. The overall average occupancy across all categories rose to 69.0%, a 19.0% increase from 2023³, indicating a rising demand for practical, extended-stay and value-oriented accommodations over traditional luxury offerings.
- In the UAE, the country continued its upward trajectory with an average occupancy rate of 78.0% in 2024, showing a 0.8% year-over-year increase, according to the UAE Ministry of Economy⁴. This performance was driven by high utilisation across accommodation types. Specifically in Dubai, hotel apartments recorded the highest occupancy at 80.0%–82.0%, followed by four-star hotels at 79.0% and five-star hotels at 76.0%, as reported in the Dubai DET Tourism Performance Report – December 2024⁵. These figures reflect sustained demand for both luxury offerings and extended-stay accommodation.

These patterns signal a regional shift from traditional hotel stays toward more flexible, group-friendly and experience-oriented accommodations, especially among families and longer-stay visitors seeking comfort, affordability and autonomy.

Insights from Mabrian on the Global Hotel Satisfaction Index further reinforce this trend, with satisfaction scores reaching 71.1 in Saudi Arabia, 68.0 in the UAE and 67.6 in Qatar (on a scale of 0 to 100). While traditional hotel offerings continue to play a role, visitor satisfaction is increasingly driven by accommodation formats that provide greater autonomy, authenticity and a stronger sense of connection to the destination.

Key takeaways:

Hospitality and destinations will need to adapt by offering experiences that prioritise belonging, while blending premium experiences, cultural cues, local character and flexibility into the guest journey.

These shifts - from passive to purposeful, rigid to fluid and luxury to meaning - are not abstract trends. They reflect how real visitors travel, choose and connect. Designing for this reality means thinking beyond static segmentation and instead embracing a more human-centric approach: one that starts with behaviour, motivation and context. In the GCC, this requires not only building environments that meet real visitor needs but also orchestrating experiences that foster emotional connection, focusing not just on how places function, but on how they make visitors feel.



2.4 Unpacking evolving visitor behaviours through archetypes

To bring this into sharper focus, we focus on four common visitor profiles emerging across the region - each offering a glimpse into how today's travel behaviours are reshaping what destinations should deliver.

These four archetypes reflect the values, behaviours and motivations shaping destination choices today - each reinforcing why flexibility, identity and emotional connection are critical to design.



The culture seeker

Motivated by: Heritage, identity and immersion

Typically: Regional or international mid-spend visitors

Seeks: Festivals, local cuisine, architecture, stories

Stays in: Boutique hotels, heritage apartments

Implication: Curate immersive Stay experiences through culturally rooted accommodations; activate Play through dynamic storytelling, festivals and arts programming; and connect Shop to authentic local crafts and culinary markets.



The regional family explorer

Motivated by: Shared experiences and short escapes

Typically: GCC families on two or three-day breaks

Seeks: Multi-age programming, cultural edutainment, inclusive play

Stays in: Serviced apartments, family suites

Implication: Ensure Stay offerings are modular and age-inclusive; design Play environments with layered activities that engage different age groups; and adapt Shop experiences with family-oriented retail and edutainment pop-ups.



The wellness-minded weekender

Motivated by: Reconnection and restoration

Typically: Urban professionals or couples

Seeks: Quiet escapes, nature, reflective moments

Stays in: Wellness-focused resorts, minimalist apartments

Implication: Prioritise Stay environments that integrate nature, wellness and simplicity; offer Play options like meditation trails, wellness walks and mindful art activations; evolve Shop offerings toward wellness retail, artisanal goods, and healthy food and beverage experiences.



The blended-purpose voyager

Motivated by: Flexibility between work and leisure

Typically: Business travellers or remote workers

Seeks: Mobility, connectivity, post-work culture

Stays in: Serviced apartments, live/work hospitality brands

Implication: Design Stay experiences that blend productivity and relaxation; create Play opportunities through evening events or activities, fitness hubs and social coworking zones; adapt Shop environments with flexible retail, grab-and-go services and smart tech offerings.

The Stay, Play, Shop model – A strategic experience blueprint

The 'Stay, Play, Shop' model should be seen as a strategic blueprint that guides design, activation and operations, rather than a checklist of services, shaping destinations where every layer contributes to identity, emotional connection and visitor retention.

When orchestrated intentionally, 'Stay, Play, Shop' creates more than just functional spaces. It becomes a placemaking blueprint that integrates accommodation, experiences and transactions into a coherent, visitor-centred journey - one that drives long-term engagement and destination distinctiveness across leisure, sports, wellness, culture and entertainment offerings.

This blueprint is particularly critical in a region where visitor behaviours are evolving rapidly. According to Mabrian's analysis of travel data available online, the average length of leisure stay for international visitors remains relatively short across key GCC destinations - with stays averaging just 4.1 days in Saudi Arabia, 4.4 days in the UAE, and 3.3 days in Qatar.

These compressed timeframes heighten the urgency for destinations to design richer, more layered experiences across stay, play and shop, ensuring that every moment delivers meaningful engagement, encourages exploration and incentivises longer stays. Curating cohesive, purpose-driven visitor journeys is no longer optional; it is a strategic necessity to increase dwell time, maximise spend and elevate destinations from transit points to true experiential hubs.



3.1 Stay: Designing for belonging, not just accommodation

Visitors' stays are no longer only about room size or amenities; it is about how grounded they feel in the destination. The accommodation layer is often the first and longest touchpoint in the journey and one of the most emotionally consequential.

Visitors increasingly seek spaces that offer autonomy, authenticity, and a reflection of local rhythms, rather than standardised experiences. "Stay" becomes a critical catalyst for building a connection - driving longer dwell times, greater satisfaction and stronger advocacy over time.

Mabrian's analysis of a leading global online travel platform reveals the sharp differences in accommodation supply across key GCC markets. In Saudi Arabia, apartments make up 54.0% of available hospitality establishments, while hotels account for just 21.0%. The trend is even more pronounced in the UAE, where apartments dominate at 85.0%, compared to only 4.0% hotels. In contrast, Qatar remains heavily hotel-centric, with hotels comprising 67.0% of establishments and apartments just 9.0%.

These patterns suggest that a more diverse accommodation supply, particularly formats that offer flexibility and a sense of independence, can help destinations better meet evolving visitor expectations. When thoughtfully integrated, such offerings foster deeper emotional connection, longer dwell times and greater engagement. This shift is redefining hospitality standards, where boutique hotels in heritage districts and design-forward serviced apartments invite guests to feel at home while discovering something new.

Key experience considerations:

- Culturally immersive environments rooted in local heritage (such as, boutique hotels repurposed from traditional houses)
- Blended formats (such as, mixed-use developments that combine wellness retreats with boutique retail)
- Spaces for reflection and reconnection through spiritual, natural or communal (such as, nature trails integrated into hospitality precincts, like the wellness paths in Wadi Safar, Riyadh or spiritual pavilions at desert resorts)
- Human-centric services that are intuitive, tech-enabled and empathetic (such as smart check-in apps that personalise guest experiences or concierge services that curate cultural itineraries based on visitor profiles)

Key takeaways:

Stay is where emotional connection begins. When accommodations reflect identity and story, they transform passive guests into participants.

Implications for offerings:

- Introduce narrative-based stays like heritage residences and locally inspired wellness lodges
- Design customisable guest experiences with layered personal touchpoints (e.g., scent, music, décor)
- Launch bundled lodging packages with built-in access to cultural, wellness, or spiritual programming
- Embed arrival rituals and storytelling tech - such as digital guides or immersive check-in experiences



3.2 Play: Activating places through experience

Play is the heartbeat of the destination. It is how spaces become memorable through active engagement, emotion and shared discovery. In the GCC, where cultural programming and mega-events are scaling quickly, Play is emerging as a strategic differentiator.

Visitors today are not chasing landmarks; they are seeking story-rich journeys that unfold in layers. According to Mabrian's data, based on tourist mentions on Instagram reflecting levels of interest, arts and culture consistently ranks as the top visitor interest across Saudi Arabia (24.5%), Qatar (28.5%) and the UAE (26.6%), which positions curated cultural experiences as a core 'Play' element across the region.

Yet secondary preferences reveal important nuances. In Saudi Arabia, strong momentum around active lifestyle (17.3%) and Nature (15.8%) highlights a Play dynamic that leans into outdoor adventure and movement-based engagement. In the UAE, the prominence of active lifestyle (13.2%), shopping (10.9%) and beach experiences (9.8%) signal a lifestyle-driven Play preference centred around leisure, retail and waterfront experiences. Meanwhile, Qatar's secondary interests in active lifestyle (21.1%), nature (10.6%) and food and cuisine (8.6%) point to a growing demand for wellness, recreation and culinary discovery alongside cultural exploration.

Across all three destinations, the consistent prominence of food and family activities reinforce that Play must be layered - combining culture, active recreation, wellness, leisure and social experiences. For example, Saudi Arabia's transformation into a global tourism hub is gaining momentum. In 2024, the Kingdom welcomed a record-breaking 30 million international visitors - a 9.5% increase compared to the previous year⁶.

Out of these, 17.5 million were international leisure visitors - a remarkable 73.0% increase compared to 2019⁷. At the same time, wellness tourism is emerging as a major growth engine, expanding at an annual rate of 66.0%⁸, with wellness-related destinations growing by 23.4% each year⁹. Together, these trends reflect a rising demand for visitor experiences that are not only immersive and dynamic, but also purposeful, restorative and deeply rooted in cultural and personal meaning.

Key experience considerations:

- Curated cultural and creative year-round programming
- Informal, everyday discovery - music corners, art walks, storytelling zones
- Digital layers (AR tours, interactive maps) that deepen participation
- Multi-age play zones and reflective nature paths
- Integrated wellness circuits for movement, mindfulness and reconnection

Key takeaways:

Play is no longer a moment; it is a method. It animates space and invites return by creating meaning through engagement.

Implications for offerings:

- Develop multi-use public realms with infrastructure for rotating activations and seasonal content
- Design gamified exploration trails or “discovery maps” for destinations and cultural districts
- Offer modular itinerary kits for different visitor segments (such as, cultural families, wellness solo travellers)
- Introduce immersive micro-programming: storyteller residencies, live crafting, spiritual walks



3.3 Shop: From transaction to expression

The retail sector in the GCC is undergoing a transformation, moving away from volume-driven growth toward a value-driven model. While in UAE, shopping centres remain dominant, across Saudi Arabia and Qatar, we are seeing the rise of experience-led retail: concept stores, artisan markets and hybrid commercial spaces that merge consumption with creativity.

Mabrian data reveals that while shopping remains a major attraction, accounting for 10.9% of tourist interest mentions on Instagram in the UAE, visitor motivations are evolving. Gastronomy and cultural storytelling, especially in Saudi Arabia, are rising in importance as visitors seek deeper, more meaningful experiences. When it comes to shopping, visitors still value the transaction, but increasingly expect it to be personalised, immersive, and reflective of their individual identity.

In Qatar, as an example, Souq Waqif is a cultural destination that blends heritage preservation with dynamic retail. Set within a maze of traditional Qatari architecture, the Souq offers more than commerce; it offers immersion. Visitors explore shops selling handmade garments, spices, perfumes and crafts, while the Souq Waqif Art Center showcases works by local artists, transforming shopping into a cultural encounter. This immersive atmosphere is further enriched by a wide range of traditional eateries and cafés, creating a holistic environment where food, art and retail intersect. The market's shaded walkways, seating areas and open plazas are intentionally designed to invite exploration, social gathering and reflection.

According to Mabrian, Souq Waqif ranks as the second most mentioned attraction in Qatar, with strong international interest led by visitors from the UK, US and France. The destination recorded a sentiment profile of over 93.0% positive or neutral mentions, signalling a high level of visitor satisfaction. Mentions peaked in key cultural months, including February 2025, highlighting the role of seasonal cultural events and activations in reinforcing destination stickiness. These trends validate Souq Waqif's success as a retail destination that delivers not only transactions, but memory-making, culturally anchored journeys.

From food markets to maker-led studios, the new retail layer invites visitors to connect, co-create, and take a story home with them.

Key experience considerations:

- Locally rooted retail: curated souqs and concept stores
- Hybrid experiential spaces combining Culture, Craft and Food
- Purpose-driven consumption: heritage-linked products, wellness goods
- Interactive and participatory journeys: tastings, workshops, co-design opportunities

Key takeaways:

Shop is no longer about transactions; it is about self-expression and cultural takeaway.

Implications for offerings:

- Curate artisanal retail ecosystems that mix shopping with story (e.g., maker districts, design souqs)
- Offer interactive commerce formats: live tastings, customisation bars, heritage demos
- Build story-to-shelf concepts, where visitors shop a trail of narrative-driven items
- Introduce retail co-creation spaces that offer “make-your-own” fashion, food, fragrance or crafts

Several destinations in the GCC are already demonstrating what happens when stay, play and shop are strategically integrated - not as standalone offerings, but as connected experiences. The following regional examples illustrate how diverse elements can come together to create visitor ecosystems that are immersive, balanced and commercially effective



Dubai – Downtown Dubai and Dubai Mall

Integrated experience highlights

- Over 1,200 retail outlets anchored by experiential zones such as Dubai Aquarium and Underwater Zoo¹⁰
- Direct connectivity to Burj Khalifa and Dubai Fountain, driving seamless cross-visitation
- Strong layering of premium retail, dining and entertainment for multi-hour stays

Retention strategies

- Continuous expansion and renovation (for example, the extension of China Town and Fashion Avenue)
- Year-round cultural programming and seasonal mega-events like Dubai Shopping Festival
- Synergistic integration with Downtown Dubai's walkable public realm

Visitor sentiment¹¹

- High ratings for variety, convenience and atmosphere
- Strong social media advocacy for integrated shopping and family-friendly experiences



Riyadh – Diriyah

Integrated experience highlights

- Immersive heritage environment centred around UNESCO World Heritage Site At-Turaif
- Seamless blending of restored historic spaces with curated contemporary retail and dining experiences
- Activation of cultural storytelling through museums, experiential exhibitions and guided heritage walks

Retention strategies

- Phased openings of new districts and attractions (for example, Bujairi Terrace, Diriyah Art Futures and Diriyah Square) to maintain ongoing visitor interest
- Programming that combines traditional Saudi heritage with contemporary cultural events and festivals
- High walkability across interconnected heritage, retail and public realm zones encouraging extended exploration

Visitor sentiment¹²

- Strong appreciation for authenticity, historical richness and attention to cultural detail
- Positive feedback on the fusion of heritage with modern amenities and elevated hospitality offerings



Doha – Msheireb Downtown

Integrated experience highlights

- Smart, walkable urban grid combining modern architecture and Qatari heritage
- Museums and curated cultural assets woven into the built environment
- Premium retail and dining for discerning lifestyle visitors

Retention strategies

- Year-round cultural exhibitions and museum programming
- Strong alignment with sustainability goals and live-work-tourism integration
- High walkability, supported by intuitive urban navigation and public spaces

Visitor sentiment¹³

- Strong appreciation for urban coherence and cultural authenticity
- Commendations for public realm quality, sustainability, and cultural immersion

These examples show what is possible when Stay, Play and Shop are not treated as standalone experience components, but as a connected, visitor-centric system. They offer a blueprint for how experience design can drive deeper engagement, more meaningful journeys and ultimately, destination loyalty.



From vision to execution: Designing connected journeys at scale

Translating the 'Stay, Play, Shop' model from blueprint to reality requires more than planning and designing assets, it demands orchestration. As destinations scale in ambition and complexity, success depends not just on what is built, but on how well experiences flow across formats, timelines and visitor profiles.

Across the GCC, the challenge is no longer attracting visitors; it is ensuring they stay longer, engage deeper and leave feeling emotionally connected. That requires integrating Stay, Play and Shop not as standalone pillars, but as a seamless, multi-touch journey, one that adapts to the visitor's intent, mood and rhythm.

To bring this to life, execution should be guided by three foundational principles:

4.1 **Orchestrate around moments, not silos**

Destinations are often developed in silos, with Hospitality, Retail, public spaces and Entertainment each optimised independently rather than as part of a cohesive, integrated experience.

Visitors do not experience places in silos. They move fluidly: from a morning coffee in a concept store below their rented apartment, to a wellness trail, followed by street food and ending with a cultural performance.

The opportunity lies in designing for transitions, not just touchpoints. This means:

- Mapping micro-journeys based on time of day, visitor archetypes and season
- Designing connective spaces that hold narrative continuity (e.g., themed walkways, tonal shifts across zones)
- Activating hybrid moments across shared spaces, such as outdoor fitness areas in retail parks, art installations in wellness hubs or live cooking experiences in dining zones

Equally important is defining the behind-the-scenes choreography that ensures this flow, experience leaders, event programmers, place curators and relevant stakeholders must all work in sync through public-private partnerships. Execution lives or dies by this cross-functional coordination.

For example, a seasonal festival might attract visitors to a heritage district, but without coordination between hotel operators, event organisers, tour operators, retailers and tourism authorities, the experience can feel disjointed. Seamless orchestration between design, planning, activation and operations ensures that every moment, from arrival to exploration and departure, reinforces the destination's narrative and amplifies the visitor's connection, dwell time and economic impact.

4.2 Build adaptive infrastructure for experience evolution

Visitor behaviour is not static. Interests shift by mood, time of day, season and broader cultural trends. Leading destinations in the GCC are learning to plan not just for a destination's launch, but for adaptation, layering and renewal.

This requires infrastructure that supports iteration:

- Programmable public spaces with plug-and-play capabilities for events, exhibitions, or pop-ups
- Digital experience engines that gather behavioural data and inform content and space curation in real time
- Flexible zoning and leasing models that allow Cultural, Wellness, and Retail content to shift and scale with evolving demand

This infrastructure is also increasingly digital. Technology is no longer a supporting tool; it is a core enabler of visitor experience integration. Smart platforms, predictive analytics and interactive apps can unify fragmented touchpoints into one seamless journey. From trip planning and booking to on-site navigation and personalised content delivery, technology makes belonging scalable, responsive and measurable.

Behind this flexibility must sit a responsive operating and governance model, designed to continually refresh, adapt and evolve the visitor experience. Centralised experience management teams must not only coordinate activities but also drive accountability across all partners through clearly defined KPIs tied to engagement, satisfaction and dwell time. To sustain this agility, destinations need incentivisation mechanisms, from flexible leasing models to event co-funding and activation-based rewards, that actively encourage partners to refresh offerings and experiment with new experiences. Together, these levers create a strong operational backbone, turning experience delivery into a living system that grows with visitor expectations and market dynamics.

4.3 Activate through coordination, not just construction

Great destinations are not just well designed, they are well managed. In mixed-use, multi-stakeholder environments, where hospitality, sports, retail, cultural and public interests intersect, success depends on more than good intent; it requires deliberate operational alignment and shared experience ownership.

That means moving beyond fragmented operations toward a coordinated delivery model where all players contribute to a unified visitor vision. Operational excellence in this context includes:

- Clear ownership of the visitor vision and customer segments - ensuring that all decisions, experiences and programming are anchored around defined visitor needs and priorities
- A centralised experience orchestrations function - acting as a “control tower” to manage programming alignment, issue resolution and voice of the visitor.
- Clearly defined experience governance frameworks – defining roles, escalation paths and experience-led incentive schemes
- Shared activation calendars and planning cycles – bringing together retail tenants, hospitality brands, operators and cultural institutions
- Metrics focused on visitor outcomes - to continuously measure and improve the quality and impact of the experience. This demands intentional choreography across Physical and Digital. The goal is to ensure every moment, from check-in to checkout, from shop to shore, reinforces the story, pace and spirit of the place.

This is not just about coordination for efficiency, it is about shared ownership of the emotional outcome. Visitors should feel that the destination speaks with one voice, no matter how many actors are involved behind the scenes.

As the operational layers of ‘Stay, Play, Shop’ come together, what emerges is more than functional excellence, it is the foundation for emotional resonance. Execution becomes the enabler of connection and the real promise of a destination is fulfilled not through what is delivered, but through what is felt by the visitor.



From destination to connection: Redefining what it means to belong

In the evolution of destination strategy, the most advanced stage is no longer defined by what is built; but by how visitors feel as they move through a place. And the most forward-looking destinations in the GCC are beginning to move beyond offerings and amenities, toward something more powerful: a sense of connection and belonging.

This shift reflects a broader maturity curve in visitor experience design. At the early stages, destinations focus on assets or what they offer. As maturity increases, they evolve into experience-led places, designing coherent journeys around insights, intent and context. At the most advanced stage, they become connection-led: where every element of the journey contributes to how a visitor identifies with, participates in and emotionally remembers the destination.

This is where the ‘Stay, Play, Shop’ model becomes more than a planning support tool. It becomes a blueprint for delivering emotionally intelligent experiences, that go beyond transaction to create memory, meaning and advocacy. It helps shape a layered, multi-format journey that adapts to different visitor types, triggers repeat engagement and embeds a sense of place that endures.

In this context, belonging is not an abstract idea. It is a strategic outcome. It signals that the destination has reached a level of maturity where it is not only attracting visitors, but also retaining them, resonating with them and converting visits into relationships.

And it shows up in measurable ways:

- Longer dwell time and higher frequency of return
- Greater spend across wellness, cultural and experiential formats
- More positive sentiment, user-generated content, and organic reach
- Stronger alignment across stakeholders around a shared experience ambition



“This thought leadership reframes how we think about destination value by integrating visitor behaviour with the realities of destination planning and placemaking. ‘Stay, Play, Shop’ is more than a slogan. It is a robust framework backed by visitor insights and evolving needs, offering development companies a strategic framework to drive visitation, spending and loyalty.”

Nicolas Mayer, Destinations Consulting Lead Partner at PwC Middle East

“Our region is witnessing pivotal changes where developments evolve from places of transit to destinations where visitors feel genuinely inspired and create lasting memories. By embracing the ‘Stay, Play, Shop’ model, leaders can shape not just where people go, but how deeply they connect and experience places. This goes beyond destination development; it is about crafting generational legacies that fuel cultural pride, visitor loyalty and sustained economic return.”

Philippe Najjar, Destinations Consulting Partner at PwC Middle East

“Public-private partnerships among Destination Management Offices, hoteliers, Destination Management Companies, retailers and operators will be a key enabler of the ‘Stay, Play, Shop’ model. Equally important is the ability to gauge sentiment and satisfaction across this journey to measure success. This region stands to gain exponentially from enhancements in these metrics, making the value delivered even more impactful. ”

Sonia Huerta, VP Advisory at Mabrian Technologies

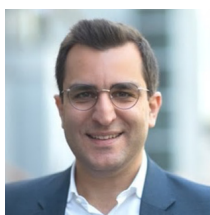
For GCC destinations, many of which are already advancing through the experience maturity curve, this is a unique opportunity: to lead not just in infrastructure or events, but in designing environments that feel purposeful, human and inclusive.

Because in the end, success is not about how many visitors arrive; but how many leave feeling something worth returning for.

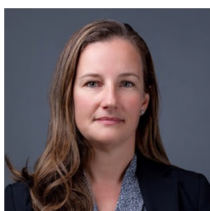
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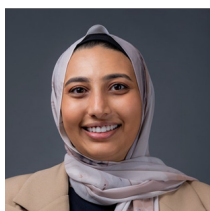
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About the study/analysis

This thought leadership was developed in collaboration with Mabrian Technologies, drawing on real-time data and behavioural insights across key tourism destinations in the GCC. The analysis is grounded in two primary sources: anonymized visitor mobility and presence data from a leading online booking platform for hotels and short-term stays in Saudi Arabia, the UAE, and Qatar, covering the period from December 2023 to December 2024; and travel motivation insights based on Mabrian's analysis of anonymized reviews from a major travel content platform, combined with Instagram hashtag and mention tracking within the same period. These sources were used to generate the insights presented in this piece, offering a robust foundation to understand evolving visitor preferences, behaviours, and intent across the region.

About PwC Middle East

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About Mabrian

Mabrian Technologies, established in 2013 and specialized in the provision of travel intelligence services at a worldwide level, merged into Al maviva Group in 2023 as a subsidiary of The Data Appeal Company, which is part of Al mawave tech ecosystem and leader on the market of technological solutions location intelligence.

The Company combines technological development based on the analysis of Big Data and Artificial Intelligence techniques with a deep knowledge of the tourism sector by its pool of analysts. With its technology Mabrian offers services to tourist destinations at any level (Country, Region, city), as well as to companies in the hotelier and transportation sectors, or consultancy related to tourism (marketing, promotion, strategy, investments, etc.), to support sector players in the decision-making process based on updated data and a constantly evolving context.