

The Report On The State Of Culture In The Kingdom Of Saudi Arabia 2022: Investment In The Cultural Sector



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“The Kingdom of Saudi Arabia affirms its commitment to supporting the role of culture as an empowering factor. It also calls for a wider exploration of the benefits of the creative economy and supports the mobilization of international resources to stimulate sustainable growth.”

Bader bin Abdullah bin Mohammed bin Farhan Al Saud
Minister of Culture



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The fourth edition of the Report on the State of Culture in the Kingdom of Saudi Arabia 2022 received backing from numerous government agencies, ministries, and civil institutions, as well as private sector companies and various local community organizations.

Collaborations, without a doubt, play a significant role in enhancing the quality of the output of this report. Their contributions are not only evident in this edition but are bound to be reflected in future editions as well, with all the challenges and achievements that come with that.

In conclusion, we express our profound gratitude to all those who contributed to this report by serving as sources of knowledge and helping to illustrate the contours of Saudi culture and the Kingdom's efforts to strengthen the role of culture and its impact on various economic, social, and human dimensions.



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Executive Summary

- Management and Conservation
- Creativity and Cultural Production
- Knowledge and Skills
- Cultural Participation
- Creative Economy



Executive Summary

After two years of unprecedented yet temporary challenges posed by the COVID-19 pandemic and its repercussions, examining the state of the cultural sector in 2022 in the Kingdom of Saudi Arabia will enable us to identify consistent trends and track growth, as well as gaps, more clearly. This report highlights growth indicators at multiple levels, such as community participation in culture and cultural tourism, the number of workers, and women's contribution to the cultural workforce. Additionally, the report tracks the continuing development of main organizational structures, from laws to frameworks, that still require more effort to create an atmosphere entirely conducive to further engagement, creation, and growth.

These indications, which show a growing engagement with culture and the development of policies and frameworks, directly support one of the objectives of the National Cultural Strategy of maximizing the contribution of culture to economic growth. It is essential to consider factors contributing to long-term investment to achieve this goal. Thus, the theme of the 2022 report focuses on "Investment in Culture." Despite the fact that it is a nascent sector coupled with data scarcity, the report shows promising signs of interest in cultural goods and services that can transform cultural projects into sustainable, rapidly growing, and financially viable businesses. The "Investing in Culture" chapter of the report highlights critical organizational developments for investment in this field, including laws on the protection of intellectual property rights and regulations on tourism, which is a significant driver of demand in the cultural sector. The chapter also identifies promising investment opportunities, such as significant local investments in the cultural sector and increased foreign investment licenses.

In 2022, the state of culture is best represented by growth in several indicators, specifically engagement rates and cultural tourism. According to the Cultural Participation Survey, engagement in cultural activities has increased across all activities measured. This trend is further supported by the local cultural tourism indicator, which shows that the number of trips that included engagement in cultural activities doubled in just one year. This interest in culture is aligned with the increasing number of amateur clubs, which tripled, and non-profit cultural organizations, though it grew slower than the previous year. These increasing engagement rates could be linked to more visible efforts by cultural institutions to support and empower cultural actors through showcasing the unique offerings made possible by festivals and significant events. Whether cultural institutions carry out their programs directly or assist others, their activities seem more connected when considering their offerings, i.e., cultural production. Several sectors experienced growth, including art exhibitions, theater shows and performance arts, and literary publishing, where the share of local publishing houses has expanded.

Growth was also a notable feature in the economic aspect of culture. Over one year, the percentage of Saudis employed in this sector increased by 10% and 27% for men and women, respectively. Economic indicators like spending and consumption indicate that the entertainment and culture sectors grew by more than 22% compared to 2021. Moreover, revenue generated by movie theaters increased by 10% between 2021 and 2022.

As cultural sectors continue to grow, it becomes increasingly essential to update their organizational aspects since the cultural sector is still going through constant transformations, which is the defining trait of this phase. This report outlines some of the recent organizational developments in several tracks, including:

- 1) Issuing resolutions, laws, and regulations, such as launching the National Intellectual Property Strategy, adopting the implementing regulations for museums, antiquities, and urban heritage, and establishing the Cultural Archive Center as an organizational unit within the Ministry of Culture (MoC);
- 2) Organization and transfer of jurisdictions relevant to various cultural sectors, such as film, translation, heritage, and antiquities;
- 3) Issuing licenses for cultural practitioners; and
- 4) Developing standard classifications and frameworks for the cultural sector.

Despite all these positive developments and tireless efforts to improve the sector, there is still a long way to go in establishing an ecosystem that supports culture, whether in terms of legislative backdrop or infrastructure development, which have not progressed much in the past year. These measures will ensure that the cultural sector attracts investments to advance and maximize its contribution to the economy and society. One of the most critical investments is in creative professionals, who are the primary force behind culture. Giving them access to educational opportunities and technical training will be beneficial. Significant developments have been made in 2022, and the sector anticipates more.



Management and Conservation

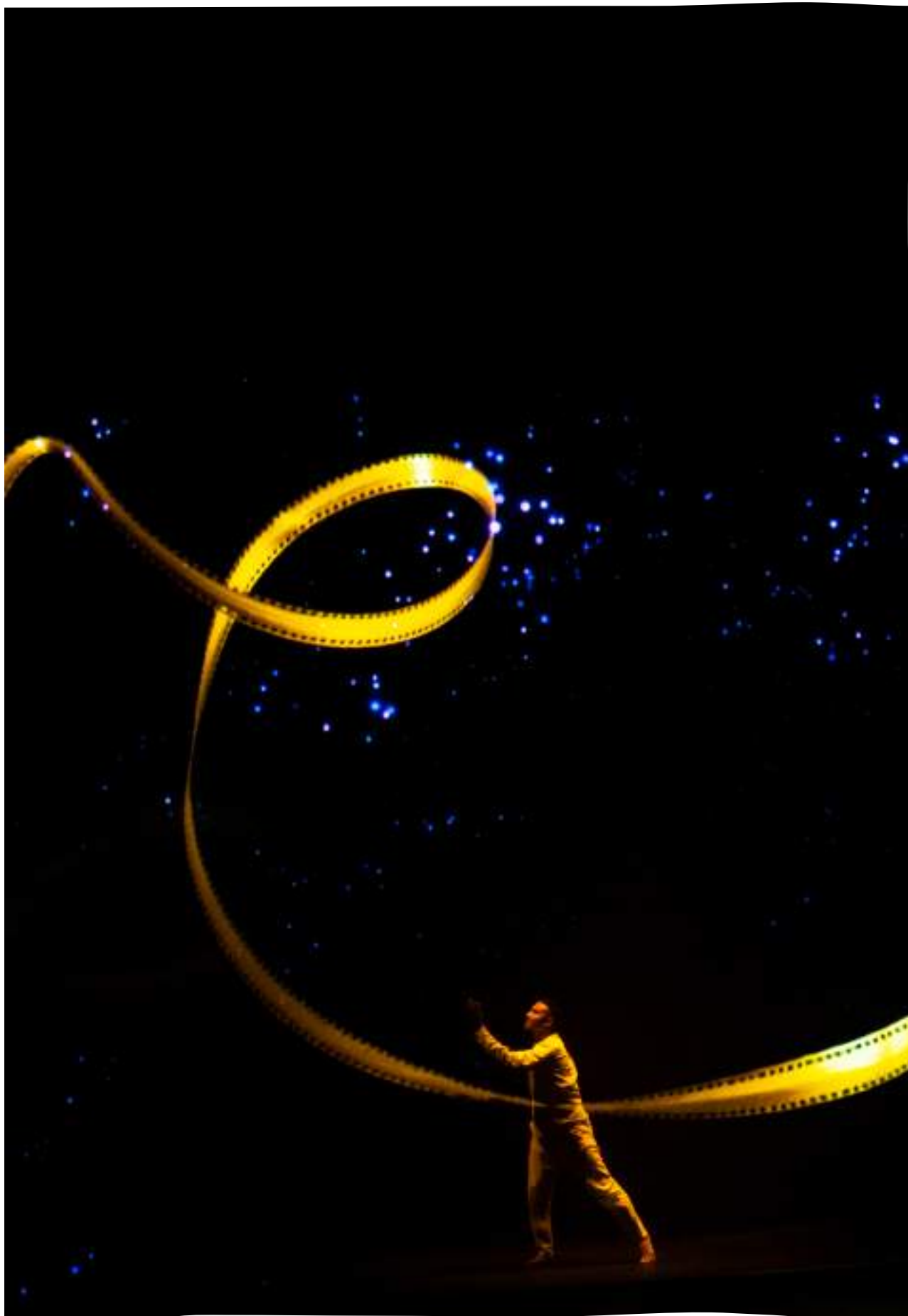
This chapter discusses the latest developments in the translation sector, a vital aspect in servicing the Arabic language, during the year. While 2021 witnessed numerous translation projects, the translation sector in 2022 has progressed to an advanced phase of organization, coordination, and support thanks to two significant developments. Firstly, the regulation and supervision of translation services have been transferred from the Ministry of Commerce to the Literature, Publishing, and Translation Commission. Secondly, the Arab Translation Observatory was launched in partnership with the Literature, Publishing, and Translation Commission and the Arab League Educational, Cultural, and Scientific Organization (ALECSO). The main objective of the Observatory is to document, support, and coordinate the translation movement in the Arab world.

As for inventorying and documenting the Kingdom's heritage, there has been a reaffirming of the centralization of heritage systematic documentation through establishing the (Cultural Archive Center) to develop policies and standards for projects related to the digital documentation and archiving of cultural heritage. Archaeological excavation and surveying projects increased from 20 in 2021 to 53 in 2022. Fundamental archaeological discoveries have been made, including ancient "stone traps," known as "desert kites," in AlUla, and significant findings in Al-Faw and the Farasan Islands. The Heritage Commission's cataloging of the national heritage records in 2021 led to a significant increase in registered artifacts on these lists in 2022. Registered urban heritage sites doubled, reaching 2,793, and registered sites on the The National Antiquities Register also increased, reaching 8,597 by the end of 2022. Moreover, Harrat Uwayrid Biosphere Reserve was registered in the Man and the Biosphere Program (MAP) of the United Nations Educational, Scientific and Cultural Organization (UNESCO), making it the Kingdom's second registered reserve in the MAP program. Khawlani Coffee and Camel Heda'a (oral tradition of calling a flock of camels) were also registered on the Representative List of the Intangible Cultural Heritage of Humanity, bringing the Kingdom's total cultural elements added to that list to 11. As for the conservation of natural heritage, the number of reserves continued to increase, reaching 38 by the end of the year. Almost achieving its goal of "preserving 17% of inland and water", the Kingdom has 16.8% of its territory comprised of terrestrial protected areas, which fulfills its obligation to the United Nations Convention on Biological Diversity (CBD), signed by the Kingdom in 2001.

The number and regional distribution of cultural facilities have remained almost the same, given that several projects aimed at developing cultural facilities are underway. The most significant development in this field has been the private sector's growing investment in some cultural facilities. However, although movie theaters increased to 63, this increase has not been evenly spread across the country, as four provinces still lack movie theaters.

Complementing the immense regulatory activity in the cultural sector in recent years, the most notable feature of regulating the cultural landscape remains the transfer of cultural mandates to newly established cultural institutions. Additionally, several implementing regulations have been issued to define work rules and controls in the context of transferring and assigning new mandates to the cultural commissions.

The year also witnessed a marked development in support programs for cultural activities, creative professionals, and actors in the cultural sector. The number of beneficiaries increased, and support programs expanded. The Cultural Development Fund, being the main backer of cultural projects and activities through the Cultural Projects Incentive Program, provided financial support for 28 projects, with most of the funding going to cinema and filmmaking projects, which accounted for 35.7% of all the projects funded.



Creativity and Cultural Production

This year, the cultural production indicators continued to show growth in various sectors, a continuation of the recovery process after the sharp production decline during the pandemic, which was thoroughly discussed in the 2021 report. Two significant factors contributed to this growth: institutional and funded production and expanding seasonal cultural events and festivals. This year, as many as 150 theatrical performances, 241 performing arts shows, and 36 children's theater performances were held, demonstrating the impact of these two factors on the theater and performance production industry. The Red Sea International Film Festival and the Saudi Film Festival successfully promoted production in the film industry. In 2022, an 87% increase from the previous year was recorded as 364 films were submitted to participate in the two festivals, and 72 Saudi films were produced.

The translation sector has received institutional support through the Tarjim Initiative, which has led to a promising increase in translated works to 524 in 2022, compared to 336 in 2021. This chapter also highlights the diversification of translated subjects, with educational children's books, philosophy, and novels being the most popular. Statistics of literary publishing show that novels continued to be the most prominent literary genre published. Overall, Saudi authors have seen a recovery in their creative output compared to the previous year, with 701 literary books published in 2022, a growth of 17.82% compared to 2021. Female literary output has also increased, with more novels written by female novelists than male novelists in 2022. Foreign publishing declined to less than 25% of all literary books, indicating that Saudi publishing houses have been more active. Additionally, research production in cultural fields has been measured, with the research published in peer-reviewed scientific journals in the Kingdom reaching 358 in 2022. Across all topics, language/literature were the fields that led the list, with 85% of all published research.

This chapter highlights the promising activity in the visual arts sector, with 486 art exhibitions held this year, i.e., a 77% increase from last year. Commercial art galleries hosted 181 of these exhibitions, with an average of 8 exhibitions per gallery featuring the works of 2,296 male and female artists. Interestingly, different galleries and institutions showcased different art trends. Commercial galleries focused more on plastic art or mixed exhibitions, while non-commercial galleries were dominated by conceptual, installation, and modern digital art. Traditional fashion styles inspired by Saudi heritage were popular in fashion exhibitions, with three out of six exhibitions in Saudi universities featuring heritage and traditional clothing. Urban heritage was also a noticeable trend in architecture and design arts exhibitions, with 31 showcasing urban heritage, product design, and interior design.

At the level of cultural creativity, the National Cultural Awards Initiative offered 16 awards in its second session, spanning 11 cultural sectors, in addition to the Youth Cultural Award, the Cultural Pioneer Award, and the Foundation's Cultural Award in the three sectors. The report also highlights 26 Saudi creative artists/works that are recipients of global recognition, along with 23 local awards in around 63 categories/tracks. The film sector received the highest local awards, followed by language and visual arts. Meanwhile, creative works in architecture, design, theater, and performing arts received the most international and regional recognition.



Knowledge and Skills

The 2022 report sheds light on the prospects of a productive partnership between the Ministry of Culture and the Ministry of Education, represented by the Cultural Capabilities Development Strategy, whose main objectives aim to increase the presence of culture in public education and improve higher education, technical, and vocational training across all fields of culture and arts. This year, the National Framework for Culture and Art Subjects has been completed as part of the strategy. The Education and Training Evaluation Commission (ETEC) has identified and adopted nine cultural areas to be included in public education. The Ministry of Education has launched several qualification and training programs throughout 2022 to enable teachers to teach these new cultural subjects, including the Optimal Investment Program, which has provided a higher diploma in the art pathway to 26 teachers in its first phase and 106 in the second. The report also highlights a significant growth in cultural and artistic extracurricular activities in public education. Notably, many student competitions have been organized, supporting heritage research and promoting creativity in visual arts. The Ministry of Culture has also distributed over 8,000 musical instruments to 100 private and international schools to offer extracurricular music activities. This initiative is a positive step towards promoting musical arts.

According to the latest available figures, 38,156 students graduated from local higher education institutions in cultural majors in 2021. Of these graduates, 70% were female. Of all the graduates, 68% majored in language and literature. Interestingly, smaller provinces like Al-Baha and Hail saw more graduates in cultural majors than more populated provinces. In the Custodian of the Two Holy Mosques Scholarship Program, given the integral relationship between it and the programs offered in the local higher education institutions in terms of the available majors, architecture, and design came first in terms of the number of graduates, with a higher proportion of females. Furthermore, international scholarship programs send several students to study music, which is not widely available in local institutions. This is a crucial step towards bridging the gap in the low presence of music graduates in local institutions.

The cultural training sector witnessed an increase in institutional regulation, reflected in the addition of more licenses to the Abde'a Platform in collaboration with the Technical and Vocational Training Corporation (TVTC). Moreover, the licensed training facilities rose from 25 in 2021 to 50 in 2022. The report also analyzes trainee statistics in training institutions supervised by the TVTC. In contrast to the distribution of cultural majors in higher education institutions, training establishments, and institutes primarily focused on practical and applied skills in sectors such as fashion, film, theater, culinary arts, and visual arts. Regarding regional distribution, the percentage of trainees in Makkah Province reached 38%, i.e., over a third of all trainees in cultural sectors across all Saudi provinces. Moreover, the report examines qualitative developments in the content, areas, and forms of cultural and artistic training provided by private sector institutions, civil society organizations, and cultural commissions.



Cultural Participation

The 2022 Cultural Participation Survey, in its fourth iteration, has provided positive figures across all participation indicators. As for attendance and diversity, it shows that more people from diverse social segments are participating in cultural activities. This year's attendance and visitation percentages increased to 66%, i.e., a rise of 25% compared to 2021. The survey indicates that visiting natural parks, reserves, and heritage sites was the most preferred activity for the respondents. Moreover, the segment of people who have yet to engage in cultural activities but would like to do so in the future is also growing. This suggests that the cultural sector will likely continue to see strong attendance and visitation rates in the coming years.

An in-depth analysis of the diverse social participation in the cultural sector would reveal that though participation rates have increased across all age groups, their relative differences declined. For instance, the survey suggests that the age group over 45 has had the highest participation rate but the lowest attendance rate. On the other hand, the gap in participation rates between different income groups is evident. Of the lowest-income respondents, 75% stated that they had not attended any cultural activity in the past 12 months, compared to 45% of the higher-income respondents. In terms of gender, male attendance rates showed a general increase compared to females.

In 2022, there were many cultural festivals and exhibitions, including the Hijrah Exhibit: In the Footsteps of the Prophet, hosted by the King Abdulaziz Center for World Culture (Ithra) and attended by 62,147 visitors, the Contemporary Art Biennale in the JAX District in Riyadh, which drew 2.8 million visitors. Madinah also hosted its first-ever book fair, which attracted 165,080 attendees and brought the total number of book fairs in the Kingdom to three, including the ones in Riyadh and Jeddah. The eighth edition of the Saudi Film Festival, which took place at Ithra Center, was attended by 16,245 visitors, a 50% increase compared to last year's numbers. A total of 214 films were submitted to the festival. Jeddah also hosted the second edition of the Red Sea International Film Festival, which attracted 35,000 visitors, an 8% increase over the previous year. The festival screened 131 films from 61 countries, including 25 Saudi films. The Coffee Festival, which received 124,929 visitors, was held in Riyadh, Khobar, and Jeddah as part of the Ministry of Culture's initiative "2022 the Year of Saudi Coffee."

According to the survey's consumer satisfaction with cultural offerings and reasons for participating, accompanying family and friends was the main reason for the second consecutive year, with 46.4% of respondents. Work commitments were the reason for 41.2% of those unable to attend any cultural events. The over-50 age group expressed the highest satisfaction level with cultural offerings. In terms of provinces, Riyadh had the highest percentage of satisfaction with cultural events, with 84%, followed by Makkah with 72%. This indicates that cultural events and activities are more concentrated in both provinces.

The number of domestic trips involving cultural activities increased by about 60% from 2018 to 2022. Moreover, there has been a 129% increase in visitors to reserves and natural parks. There was an annual growth of 82% in visits to archaeological sites, an activity that witnessed a total growth of 328% over the past five years. The Cultural Tourism Indicator has shown an increase in all cultural activities, including museum visits and art exhibitions. It should be pointed out that participation rates in these activities have surpassed those of previous years, which have continuously declined since 2018. Madinah, Makkah, and Asir Provinces have been the most popular destinations for domestic cultural tourism trips.

The report highlights an eight-fold increase in non-profit cultural organizations over the past five years, with a total of 69 in 2022. However, most of these organizations are based in Riyadh City while either declining or nonexistent in some cultural sectors. In contrast, the number of amateur clubs has almost tripled compared to 2021, with 93 such clubs established in 2022.



Creative Economy

In 2022, the creative economy indicators have shown a steady recovery from the impact of the COVID-19 pandemic. This is evident in the cultural tourism sector, which has reached its highest levels and is rapidly growing, along with other spending indicators. The labor market in cultural fields has also experienced growth.

According to Q3 2022 data, the number of employees of both genders in direct cultural professions increased by an estimated 5.53%, reaching 181,709, mainly driven by the higher number of chefs and baristas in the culinary arts sector. Over 64% of the cultural workforce is employed in these two professions. However, the cultural sector still has plenty of potential to create more job opportunities at the level of the national economy, as those employed in the primary cultural professions only accounted for 1.25% of the total workforce in the Kingdom in 2022. This percentage rises to 1.7% when including indirect cultural professions, with 242,003 employees of both genders.

Except for chefs and baristas, the cultural sector's labor market has a high participation rate of Saudi women. In Q3 2022, their number in cultural professions exceeded that of men, with a participation rate of 51%, an increase from 47% in Q3 2021. Interestingly, in 2021 and 2022, women's participation in the cultural sector has been higher than the general rate of women's participation in the overall labor market. In terms of Saudization, the number of non-Saudi workers in the sector decreased. In contrast, that of Saudi male and female workers increased, raising the Saudization rates in the cultural sector from 27% to 32%.

The Kingdom has over 11,850 cultural facilities, classified as micro, small, or medium enterprises (MSMEs). Among them, micro facilities comprise around 75% of the total. Most of these facilities are in Riyadh, Makkah, and the Eastern Province, while 25% are scattered across all regions. Several organizations support these cultural facilities in different ways. The Cultural Development Fund is the leading entity in this field. Established in 2021, the fund has subsidized 68 cultural MSMEs with SAR 61 million by the end of 2022. The Small and Medium Enterprises General Authority (Monsha'at) provides private cultural enterprises with critical training, consultancy, and facilitation services. Since its inception in 2016, Monsha'at has provided non-financial assistance to 2,257 SMEs.

The latest household consumer expenditures data (2021 preliminary estimates) show that spending on entertainment, recreation, education, and cultural services has increased by 22.8% compared to 2020. It reached SAR 137.6 billion in 2021, up from SAR 112 billion in 2020. Despite this, the household spending indicator did not return to pre-pandemic levels until the end of 2021, as it was below the statistics of 2019 when household spending on entertainment, education, and cultural services peaked.

The number of domestic cultural tourism trips grew by 109% from 2019 to 2022, a higher growth rate than the total domestic tourist trips, which only increased by 63% during the same period. This indicates a rise in the share of touristic trips involving cultural activities. In 2022, domestic cultural tourist trips involving cultural activities reached a record high of over 18 million, which is at least a 52% increase from the previous year. However, the most significant change in cultural tourism in 2022 was the recovery of inbound cultural tourism statistics. After reaching its lowest point in the past five years with only 480,000 trips in 2021, the number of inbound tourist trips that included cultural activities bounced back to around 4 million, closer to pre-pandemic levels.



Introduction

After two years that have been colored by the challenges posed by the COVID-19 pandemic, a reading of the state of the cultural sector in the Kingdom of Saudi Arabia ("Saudi Arabia") in 2022 offers an opportunity to assess stable trends, growth indicators, and areas of limitations, which is the aim of the fourth edition of the Report on the State of Culture in the Kingdom of Saudi Arabia in 2022, an extension of the previous three editions. The report documents the sector's developments, monitors its general trends, and evaluates its performance by tracking meticulous indicators and analyzing a broad spectrum of data sources. Overall, the report highlights signs of growth at various levels, including community participation in culture, cultural tourism, the number of people working in the sector, women's contribution to the cultural labor market, and others. Additionally, the report discusses the continued development of vital regulatory structures, such as laws and frameworks, in addition to the infrastructure, which has not seen any significant development. Additional measures need to be implemented to create an environment that stimulates more participation, creativity, and growth.

The rising demand for culture and the development of policies and frameworks directly support one of the objectives of the National Culture Strategy, namely, to maximize the contribution of culture to economic growth. Culture not only plays a vital role in shaping identity, building community resilience, and ensuring individual well-being, but it can also boost livelihoods and drive economic prosperity. From the prism of this multidimensional conceptualization of culture, the cultural sector provides employment opportunities for writers, photographers, and cultural artisans, as well as freelance designers and professional theater groups. It offers financial returns to investors in fashion design trademarks, traditional restaurants, or film production studios. Culture can create both economic value and social meaning. But for a nascent sector to create this value, achieve economic returns, and attract more investments, it needs to establish stable regulatory frameworks, facilities, and infrastructure and invest in creative professionals who are the source of creative value.

The report's theme is "Investing in Culture," which highlights the significance of long-term investment components. Despite the cultural sector's newness and lack of data, the report reveals promising signs of high demand for cultural products and services. As a result, it is possible to transform cultural



projects into sustainable business models that offer rapidly growing financial returns. The report's chapter dedicated to "Investing in Culture" also highlights several crucial regulatory developments for investment in the cultural field, from intellectual property protection laws to tourism regulations. The cultural sector benefits significantly from tourism, which is a significant source of demand. Furthermore, this chapter explores promising investment prospects related to both significant local investments in the cultural sector and growth in the number of foreign investment licenses.

In the rest of the chapters of the report, which achieve the main objective of presenting a comprehensive view of the sector and how it developed during the year, the 2022 edition builds

Introduction

on the exact dimensions developed in the previous report so that each dimension is addressed in a separate chapter. The first chapter, Management and Conservation, evaluates the sustainable management of cultural heritage, serving the Arabic language, the efficiency of infrastructure, and the developments concerning regulatory frameworks and support. The second chapter, Creativity and Cultural Production, measures cultural production levels, whether in publishing, audiovisual production, arts, design, theater, or performing arts, while also discussing domestic and international awards won by Saudi creative professionals or works. Due to the immense importance of cultural education, the report dedicates an entire chapter to education, Knowledge and Skills, discussing the developments and indicators concerning the developments and indicators of education and training in cultural fields. The Cultural Participation chapter presents a multidimensional picture of participation levels and the extent to which the cultural sector is capable of reaching diverse segments of society, including non-profit activities. Finally, the fifth chapter, Creative Economy, analyzes economic indicators in the sector, from job statistics to business, tourism, expenditure, and demand.

This Year's State of Culture

The state of culture in 2022 is characterized by growth in various dimensions, particularly in the rates of cultural participation and cultural tourism. This growth indicates the recovery of the cultural sector from the unprecedented challenges faced in 2020 and some consequences that persisted into 2021. The Cultural Participation Survey showed an increase in participation across all surveyed activities, from museum and library visitation rates to concerts, festivals, and visits to archaeological sites and nature reserves. The domestic cultural tourism indicator also supports this trend, with the number of trips involving participation in cultural activities doubling in just one year. This growing demand for culture coincides with a tripling in the number of amateur clubs. Although the number of non-profit cultural organizations increased at a slower pace compared to the previous year, the trend is still upward.

The increase in participation may be attributed to the agility of cultural institutions, which offer quality cultural products such as festivals and events and also support and enable cultural actors. For example, the Literary Partner Program launched by the Literature, Publishing, and Translation Commission has been successful in supporting private coffee shops to become platforms for cultural activity.

The purpose of this program is to improve active cultural support programs, such as artist residencies, business



accelerators, and cultural grants for projects and research. The contribution of cultural institutions can be seen through their support and direct implementation of cultural production. Several sectors have shown growth, including the literary publishing sector, where local publishing houses have increased their share. Additionally, art exhibitions, theater shows, and performance arts have also registered growth. This is due, in part, to institutions such as the General Entertainment Authority and the Theater and Performing Arts Commission, which run or support these shows. This reflects the growth of the Saudi Arabian Society for Culture and Arts (SASCA), which has, throughout its long tenure, supported the activities of theater groups.

In economic terms, cultural growth emerges as a commanding characteristic. Over the past year, there has been a 10%



increase in Saudi male workers and a 27% increase in Saudi female workers in the cultural sector. With respect to expenditure and consumption indicators, the entertainment and culture sectors have both witnessed growth that exceeds 22% in comparison with 2021. Between 2021 and 2022, movie theater revenues have also grown by 10%. On the other hand, the report reflects on other vital economic indicators, such as contributing to the gross domestic product (GDP), where frameworks related to critical data and data sources in the cultural field require more regulation and collection efforts. Statistics, based on which policies are drawn, and observers can evaluate the sector's performance, including in the Report on the State of Culture, are not a marginal issue.

Given that development is an ongoing process and cultural sectors are constantly evolving, it has become imperative



to establish regulatory structures to support them. In this regard, the Saudi cultural sector urgently requires specific essential prerequisites to be met for cultural activities to take place and for the sector to become sustainable with its successful institutions, communities, and non-profit organizations. The sector has witnessed several significant regulatory developments recently, such as the launch of the Abde'a License Platform and the implementation of several key implementing regulations in museums and heritage sectors. Furthermore, the Intellectual Property Strategy has been unveiled. Among the most pivotal organizational developments are those related to heritage conservation, including the establishment of the Cultural Archive Center as an organizational unit under the Ministry of Culture, where it will play a central role in preserving heritage, archiving cultural artifacts, and enhancing preservation practices in the sector.

Despite the rigorous efforts to develop the cultural sector, there is still a lot to be done to create an environment that is conducive to culture. More bold and sustainable actions are necessary to enhance regulatory structures and infrastructure that have not undergone significant developments in 2022. Those interested in the sector are still waiting time for major infrastructure projects to take place. However, the foundational work achieved so far is sufficient to attract investments in the cultural sector, which will help to advance it and maximize its contribution to the economy and society. Investing in creative professionals is perhaps the most important investment of all since they are the driving force of culture. Providing them with educational opportunities and technical training at all levels is crucial. This prospect will witness essential developments in 2022 as the cultural sector aspires for more significant support and broader opportunities.

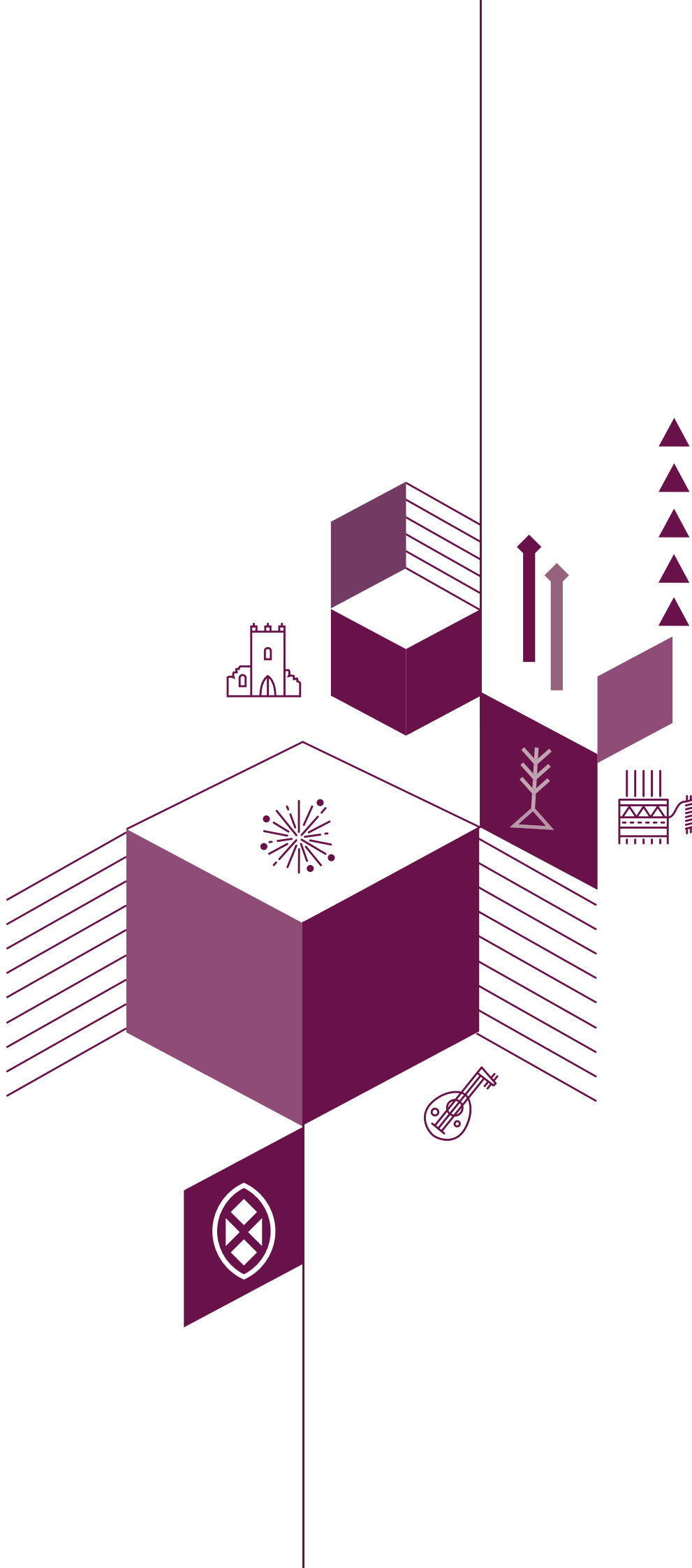
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Chapter One



Management and Conservation

- Serving the Arabic Language
- Heritage Conservation and Sustainable Management
- Facilities and Infrastructure
- Empowerment and Regulatory Frameworks





This chapter examines the state of culture in Saudi Arabia in relation to trends in regulatory and organizational frameworks and cultural infrastructure. It also looks at developments that ensure local cultural heritage's ability to survive and be passed on to future generations through archaeological discoveries, interpretation, documentation, and raising awareness of local cultural heritage, as well as strengthening its position in public life and sustainable development. Additionally, this chapter observes the policies and programs that aim to support culture and creativity, as well as efforts seeking to serve the Arabic language as a vessel for Saudi culture and its essence.

Alongside the expansion of projects documenting cultural heritage, this year has witnessed efforts related to the governance and development of this documentation. This has been done by establishing the Cultural Archive Center, which takes over policy and criteria development for projects of cultural heritage inventory, documentation, and digital archiving. Furthermore, excavation projects, along with the interpretation and study of their findings, have led to a group of essential discoveries in AlUla, Al-Faw, and Farasan Island. Such scientific enhancements have added significantly to the depth of Saudi archaeological and cultural heritage. This year has also seen a notable rise in attention to intangible cultural heritage (ICH), with the success of having new Saudi elements inscribed on the United Nations Educational, Scientific and Cultural Organization (UNESCO) lists. Regarding the regulation and organization of the cultural landscape, the process of moving cultural functions to newly established cultural institutions continued this year. Although there were no drastic changes to the state of the main cultural facilities, the prime indication in this regard was the private sector's role in investing in setting up some cultural facilities and enabling existing ones in partnership with the public sector. This year also witnessed the launch of the Arab Translation Observatory, the most essential project in service of the Arabic language, which aims to document and support the translation movement and coordinate its efforts in the Arab world.



Serving the Arabic Language

Efforts related to serving the Arabic language have gained significant importance, considering that it is a vessel for Saudi culture. This part of the chapter looks at the policies, programs, and initiatives that enhance the richness and visibility of the Arabic language, examining the institutional efforts in the education and training of non-native speakers as well as developments in translation from and into Arabic. Among the most prominent of these was the launch of the Arab Translation Observatory, as well as moving the function of regulating and supervising translation offices and services to the Literature, Publishing, and Translation Commission.

Ecosystem of Language Programs and Projects

Teaching Arabic to Non-Native Speakers

Local higher education institutions offer several programs in the field of teaching Arabic to non-native speakers. Graduates from these programs are a tributary for teachers joining Arabic language teaching institutes and units for non-native speakers at Saudi universities. Last year, 548 students

graduated from these programs at six local universities (Figure 1), with female students representing 83% of the total, making up 453 of the graduates. Although the students

graduated from a variety of academic programs, including master's and doctorate programs, most of them came from diploma programs (Figure 2).⁽¹⁾

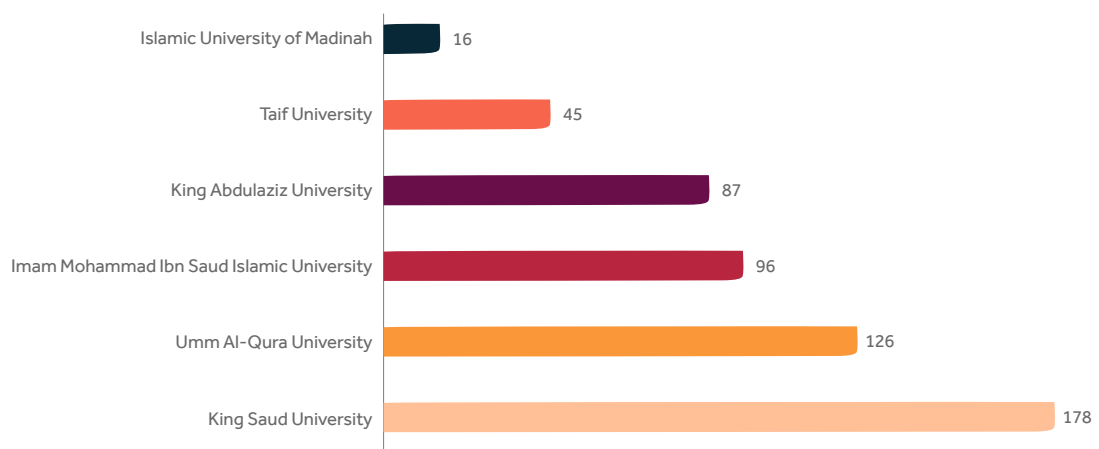


Figure 1: Number of Graduates from Arabic Teaching for Non-native Speakers Programs at Local Universities

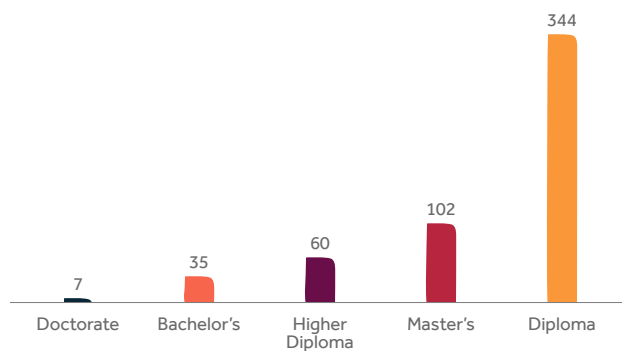


Figure 2: Number of Graduates from Arabic Teaching for Non-native Speakers Programs at Local Universities by Academic Program Type

In addition to academic programs, Arabic has received similar attention in training, which is noticeable in the programs offered in non-native speaker language education. This year, the King Salman Global Academy for the Arabic Language (KSGAAL) organized a series of training courses for teachers of Arabic to non-native speakers both in Saudi Arabia and abroad. The most significant share of these was offered to beneficiaries from abroad, reflecting the priority that the KSGAAL places on Arabic language service internationally.⁽²⁾

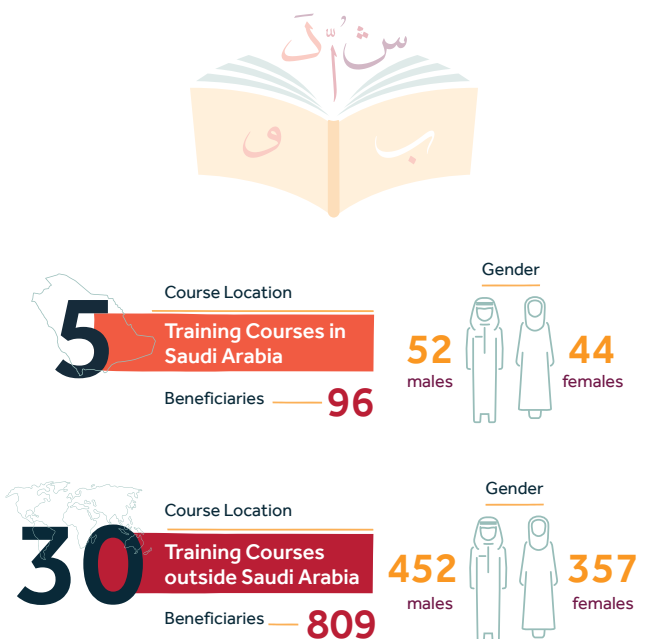


Figure 3: Training Courses offered by the KSGAAL to Teachers of Arabic Language to Non-native Speakers, 2022 (to be in infographic form)

Translation Projects

While the Creativity and Cultural Production Chapter measures the number of translated works and their trends, this chapter presents an overview of institutional work in the field of translation and Arabization as an indicator of serving the Arabic language in Saudi Arabia. This work can be tracked through three pathways: 1- regulatory/organizational transformations in the translation sector, 2- translation and Arabization centers in Saudi Arabia, and 3- institutions' projects, whether translated publications or initiatives and programs related to translation. The last year witnessed two critical developments in the regulation/organization of the translation sector in Saudi Arabia. The first of these was the launch of the Arab Translation Observatory through a partnership between the Literature, Publishing, and Translation Commission and the Arab League Educational, Cultural, and Scientific Organization (ALECSO). The Observatory aims to document and support the translation movement in the Arab world and coordinate translation efforts within a unified Arab plan, in addition to being a digital database for the translation sector.⁽³⁾ The second significant development was that the regulation and supervision of translation offices and services was moved from the Ministry of Commerce to the Literature, Publishing, and Translation Commission.⁽⁴⁾

The number of translation offices and services in Saudi Arabia was estimated to be 288, with 44.44% in Riyadh Province, followed by Makkah Province with 25.35%, then the Eastern Province with 16.67% (Figure 5). Meanwhile, there were 17 university-based translation and Arabization centers and units (Table 1). The report observed 29 works translated in 2022 and published by ten institutions (Figure 4). In addition to these publications, the Saudi Data and Artificial Intelligence Authority (SDAIA), in cooperation with the KSGAAL, announced the publication of the most extensive data and artificial intelligence (AI) glossary with the essential technical AI terms in Arabic and English.⁽⁵⁾

As for institutional programs and initiatives, the Literature, Publishing, and Translation Commission organized a Translation Hackathon titled "Translating Culture in the Age of Artificial Intelligence: Challenges and Solutions," which was held over four days in October. A total of 627 applicants applied for the hackathon, with 102 of them being accepted, including 34 teams. At the end of the hackathon, the three winning applications were "Irrth" in first place, "Jusoor" in second place, and "Alsun Alarab" in third place.⁽⁶⁾ Ithra also announced the "Jusoor Poetry" project within the Ithra Content Initiative, which was launched in 2020, aiming to translate Saudi poetry into French.⁽⁷⁾



Table 1: Translation Centers and Units in Saudi Universities⁽⁶⁾

University	Center/Unit/Department
King Saud University	Translation Center
Imam Mohammad Ibn Saud Islamic University	King Abdullah Institute for Translation and Arabization
King Abdulaziz University	Translation and Arabization Center
Umm Al-Qura University	Translation and Arabization Center
Prince Sultan University	Translation and Authoring Center
King Faisal University	Translation, Authorship, and Publication Center
Naif Arab University for Security Sciences	Security Research Center – Security Translation and Proofreading Unit
Saudi Electronic University	Translation Center
Qassim University	Center for Scientific Publishing and Translation
Northern Border University	Translation, Authorship, and Scientific Publication Center
Fahad Bin Sultan University	Translation and Language Editing Center
Majmaah University	Center for Publishing and Translation
Shaqra University	Authoring, Translation, and Publishing Department
Islamic University of Madinah	Translation Unit
Princess Nourah bint Abdulrahman University	College of Languages – Translation Unit
Jouf University	Translation Unit
Jazan University	Translation Unit

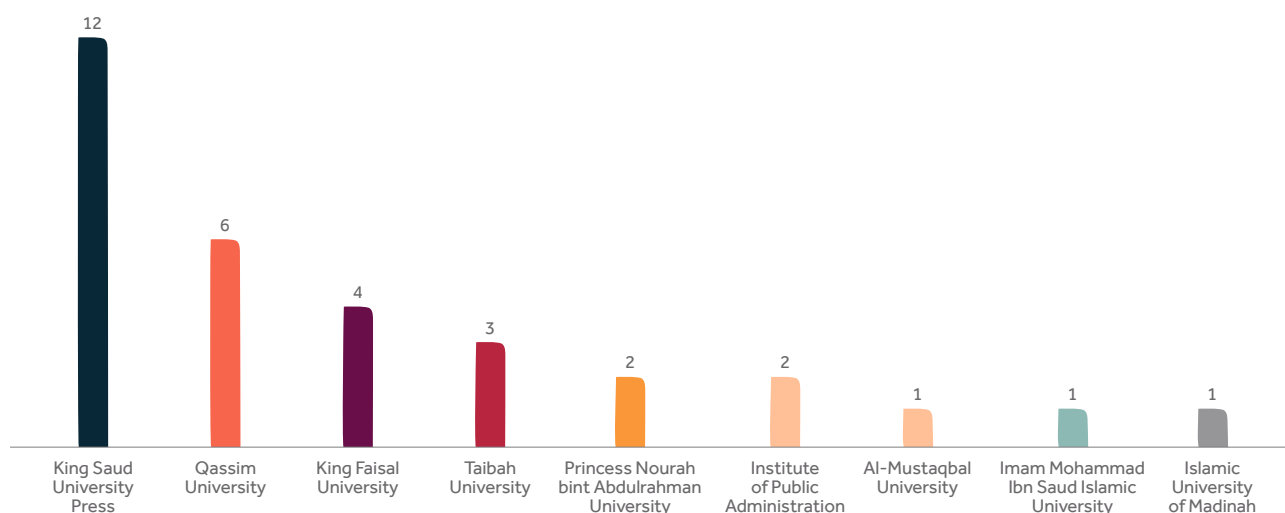


Figure 4: Number of Titles Translated by Some Universities, 2022

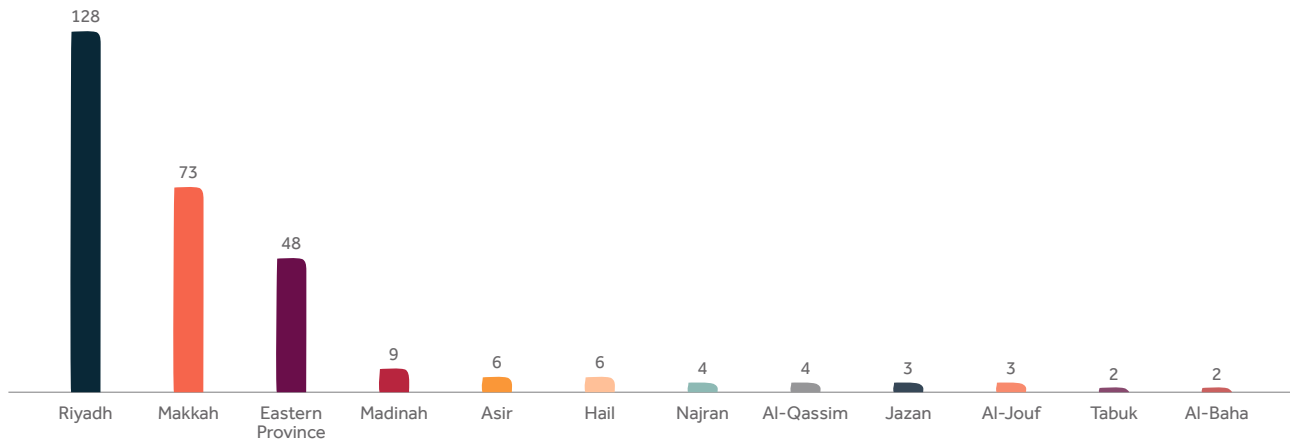


Figure 5: Commercial Translation Services Establishments by Province⁽⁹⁾

Heritage Conservation and Sustainable Management

This section observes developments in documenting Saudi cultural heritage, recording it on national and global lists, archiving creative works, and measures to protect this heritage and ensure its survival and sustainable management. The most notable event during the year in the heritage documentation field was the establishment of the Cultural Archive Center as the entity responsible for developing policies and criteria for projects related to cultural heritage inventory, documentation,

and digital archiving. Also noteworthy was the Center's publication of the Resource Manual for Digital Documentation and Archiving of Cultural Heritage in Saudi Arabia. Meanwhile, in heritage protection, there was remarkable growth in attention to ICH through awareness programs in education and the emergence of a sustainable development model that aims to preserve cultural heritage in areas of business and investment, in addition to the designation of the year as the Saudi Coffee Year. This attention to ICH culminated in Saudi Arabia's success in inscribing Khawlani coffee and Alhed'a to the Representative List of the Intangible Cultural Heritage of Humanity by the end of 2021.



Research, Documentation, and Inventory

The processes of research, inventory, and documentation of cultural heritage are a prerequisite for its conservation and sustainability. During the year, research and exploration efforts in tangible cultural heritage (TCH) continued through excavation expeditions, archaeological surveys, and heritage inventorying in national heritage registers. Additionally, efforts included inscribing such heritage in global lists and projects documenting ICH, which witnessed notable development. Notably, in these efforts, there was a clear trend of local community involvement in documentation and inventory processes, such as in the "Inventory and Documentation of the Culinary Arts" project and the "Saudi Trouq" (lit. traditional songs) project for inventorying musical traditions, as well as in the "Inscriptions of Saudi Arabia" initiative for inventory and documentation of rock carvings.

Antiquities: Excavation Projects, Archaeological Surveys and Discoveries

Excavation projects and archaeological surveys across various Saudi provinces increased in 2022, with the number carried out by the Heritage Commission reaching 53, compared with 20 projects in 2021 (Figure 6). Concurrently, archaeological excavation mission efforts to uncover cultural heritage sites and expand the outreach of this heritage, its history, and its meaning have intensified. This has led to several important archaeological discoveries. Scientific research undertaken by the Royal Commission for AlUla, in cooperation with a team from the French National Centre for Scientific Research, uncovered structures that turned out to be "stone traps" that were used by the region's inhabitants for hunting during the late Neolithic period. Scientific research suggests that these structures were the most significant archaeological structures built in this period.⁽¹⁰⁾ In July 2022, the Heritage Commission announced that a Saudi team of scientists, in cooperation with a team of international experts, uncovered a group of antiquities at Al-Faw site. These discoveries included a worship area for the inhabitants at a stone facade built into the Tuwaiq escarpment to the east of the archaeological site of Al-Faw. Findings also included the remains of a temple and a sacrificial table, in addition to several scattered devotional inscriptions. These discoveries have provided more information about religious organizations in the ancient city of Al-Faw.⁽¹¹⁾ In August 2022, the Heritage Commission also announced essential discoveries at the archaeological sites on Farasan Island by a joint Saudi-French team of scientists⁽¹²⁾. The Heritage Commission also presented a new interpretation of a significant archaeological inscription dating back to 24 AH⁽¹³⁾ that some archaeology enthusiasts came across at the Alia Palace archaeological site in Makkah Province.

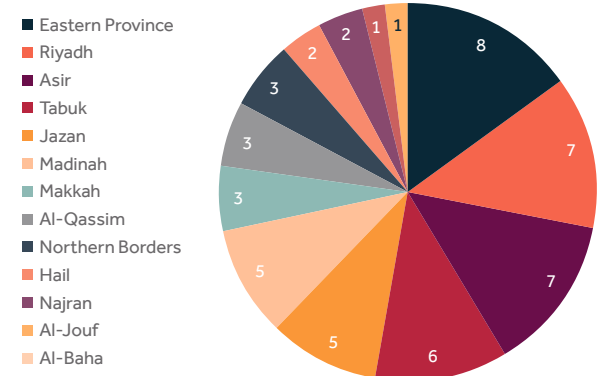


Figure 6: Excavation Projects and Archaeological Surveys by Province, 2022

ICH: Updates of Documentation and Inventory Projects

In an essential step towards regulating/organizing the sectors of cultural heritage inventory, documentation, and digital archiving, the Ministry of Culture (MoC) established the Cultural Archive Center in 2022. The Center assumes the responsibility for policy and criteria development for projects relating to these sectors, as well as overseeing their implementation and the compliance of the related entities. Among the most notable accomplishments was the Center's first edition of the Resource Manual for Digital Documentation and Archiving of Cultural Heritage in Saudi Arabia," which was published in September 2022, presenting a methodology and standard procedures. In this regard, the Center places importance on capacity development and empowering cultural sectors to build their capabilities. Among the most notable successes of these efforts was the "upskilling of local staff in documentation, inventory and digital archiving of cultural heritage" program, a partnership between the Center and the Royal Institute of Traditional Arts.⁽¹⁴⁾

Furthermore, during the year, the inventory and documentation of ICH projects in Saudi Arabia have increased. Among the most important of these projects was the methodology for documenting ICH, which was launched this year by the “Saudi Trouq” project through which the Music Commission and the Theater and Performing Arts Commission undertook work on the inventory and documentation of musical and performative traditions in Saudi Arabia.⁽¹⁵⁾ Throughout the year, the program, with participation from the people of Asir and Al-Baha provinces, has recorded 30 documentaries about the ways and songs of the two provinces, as well as 270 lyrical melodies from diverse musical traditions.⁽¹⁶⁾ Through the “inventory and documentation of culinary arts and documentation of traditional cuisine” project, the Culinary Arts Commission conducted an inventory of culinary arts. It documented traditional dishes in the central and eastern regions,⁽¹⁷⁾ complementing the works of inventory in the northern, western, and southern regions. The Heritage Commission started the “Encyclopedia of Crafts in Saudi Arabia” project to document the handicraft cultural industries. During the project, 11 of the leading craft fields were documented, including 51 subsectors, up to the end of 2022.⁽¹⁸⁾ The Commission also started documentation of heritage inscriptions and decorations in several Saudi provinces. The outcomes of the project this year were 10,755 documentary photos and a group of manual and

electronic drawings, as well as several laser scans of traditional decoration.

National Heritage Registers

The national heritage registers, comprising the National Antiquities Register, the National Urban Heritage Register, and the National Industrial Heritage Register, reflect that Saudi Arabia is teeming with archaeological and urban heritage sites. The increase in the number of elements inscribed on these registers reflects the continuation of efforts in inventory and documentation of cultural heritage sites in Saudi Arabia to protect, restore, and preserve them and identify their cultural and historical value. The number of urban heritage sites recorded for their documentation and preservation more than doubled, so by the end of 2022, there were 2,793 sites recorded in the National Urban Heritage Register, compared with 1,023 that were recorded up to the end of 2021.⁽¹⁹⁾ The larger share of these sites was in Riyadh Province with 80%, followed by Al-Qassim with 19%, in addition to ten sites in Makkah and Madinah Provinces. Meanwhile, the number of archaeological sites recorded on the National Antiquities Register was 8,597 at the end of 2022, compared to 8,176 in 2021. Most of the archaeological sites recorded this year were in the provinces of Hail and Asir. At the same time, the JAX District in Diriyah, Riyadh Province, was added to the National Industrial Heritage Register, becoming the second recorded industrial heritage site after the Trans-Arabian Pipeline.⁽²⁰⁾

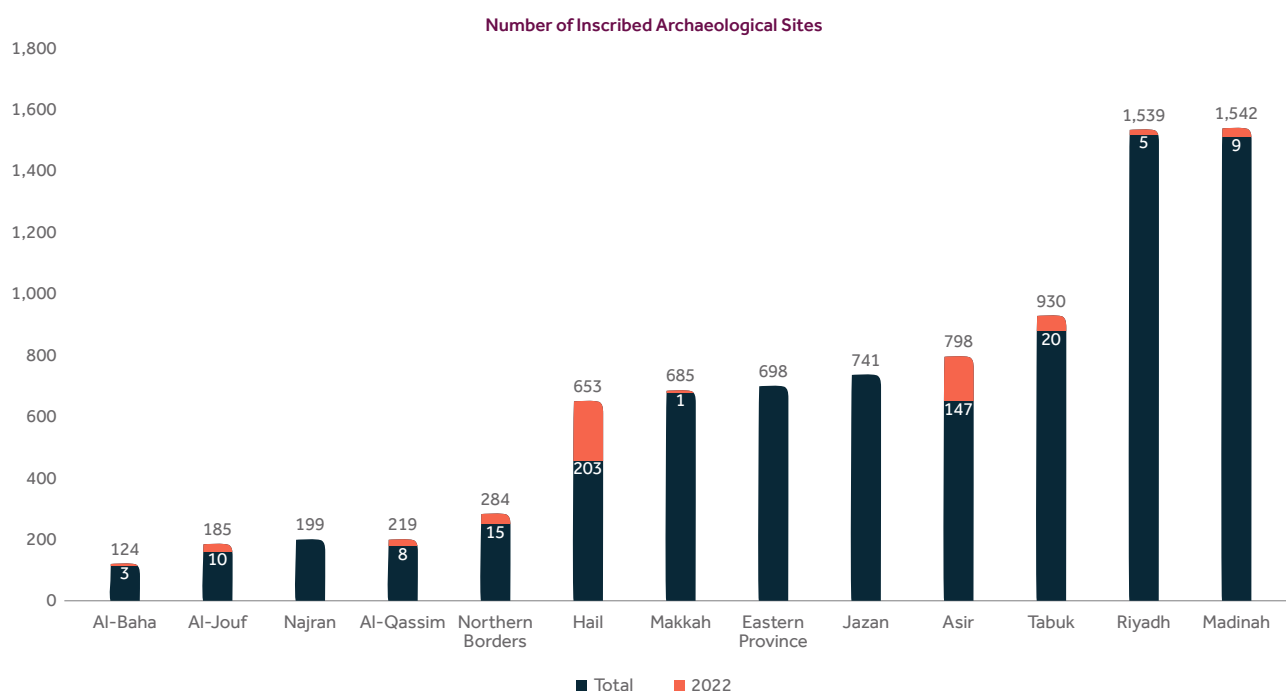


Figure 7: Number of Archaeological Sites Inscribed in the National Antiquities Register and their Distribution by Province, 2022

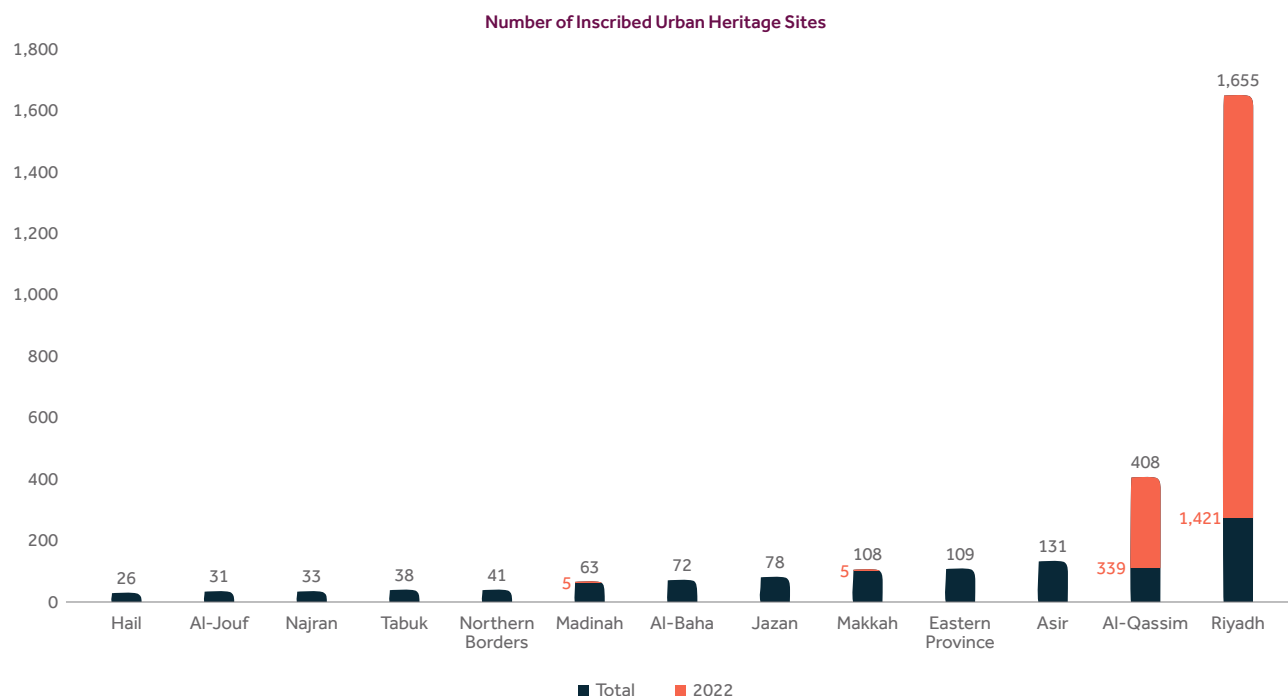


Figure 8: Number of Sites Inscribed in the National Urban Heritage Register and their Distribution by Province, 2022

World Heritage Lists

In 2022, Harrat Uwayrid Biosphere Reserve was inscribed in the UNESCO Man and the Biosphere (MAB) program, an international program concerned with preserving the relationship between people and their environment. This was the second Saudi reserve inscribed in the program after that of Farasan Island in 2021.⁽²¹⁾ The Harrat Uwayrid Biosphere Reserve is the largest of the five reserves in the AlUla region. By the end of 2022, Saudi Arabia inscribed two

elements of local culture on the UNESCO Representative List of the Intangible Cultural Heritage of Humanity. The first was the knowledge and practices associated with cultivating Khawlani Coffee, inscribed individually for Saudi Arabia. The second element was Alheda'a, inscribed in a shared file with the Sultanate of Oman and the United Arab Emirates. This brings the number of elements inscribed on the UNESCO Representative List of the Intangible Cultural Heritage of Humanity to eleven (Figure 9).⁽²²⁾



Khawlani Coffee trees grow in the southwestern part of Saudi Arabia, and there is a group of particular practices that govern their cultivation, which are related to timing, pruning techniques, watering of the trees, and harvesting their crop.⁽²³⁾ Meanwhile, Alheda'a is an oral tradition for calling herds of camels, which has been passed down through deserts in Saudi Arabia's provinces.⁽²⁴⁾ Endeavors to record elements of the Saudi ICH aim to document national heritage and shed light on it both locally and globally, thus enhancing the assurance of its sustainability. Among the notable efforts and endeavors was the preparation and presentation to UNESCO of the periodic report assessing the ICH state. This is one of the conditions of the 2003 Convention for the Safeguarding of Intangible Cultural Heritage, signed by Saudi Arabia. Furthermore, this year witnessed the first thirteen elements recorded in the international organization Slow Food's Ark

of Taste catalog.⁽²⁵⁾ These elements were Al-Kabath, or Fruit of the Prophet, from Makkah Province, Melh Al-Qasab from Riyadh Province, Saudi Khawlani Coffee, Sidr Mountain Honey, Al-Kadi Plant from Al-Baha, Al-Hassawi Rice, and Al-Bur Al-Najrani. From the north, there were Al-Samh seeds, Al-Kamaa (truffle), the Red Camel, and Shajart Al-Yusr (Moringa). Al-Mghami dates from Al-Qassim Province and Al-Hellya dates from Madinah Province were also recorded.⁽²⁶⁾ It is worth noting that this catalog serves as a global guide to foods endangered or threatened by extinction. In addition to record keeping, the catalog gathers samples of foods linked to culture, history, and heritage, including meat products, cheeses, fruits, vegetables, and others. The Ark of Taste catalog aims to raise awareness about the dangers that these foods face, such as climate change, the effect of technical and industrial development on agriculture and consumption patterns, and the erosion of agricultural areas.

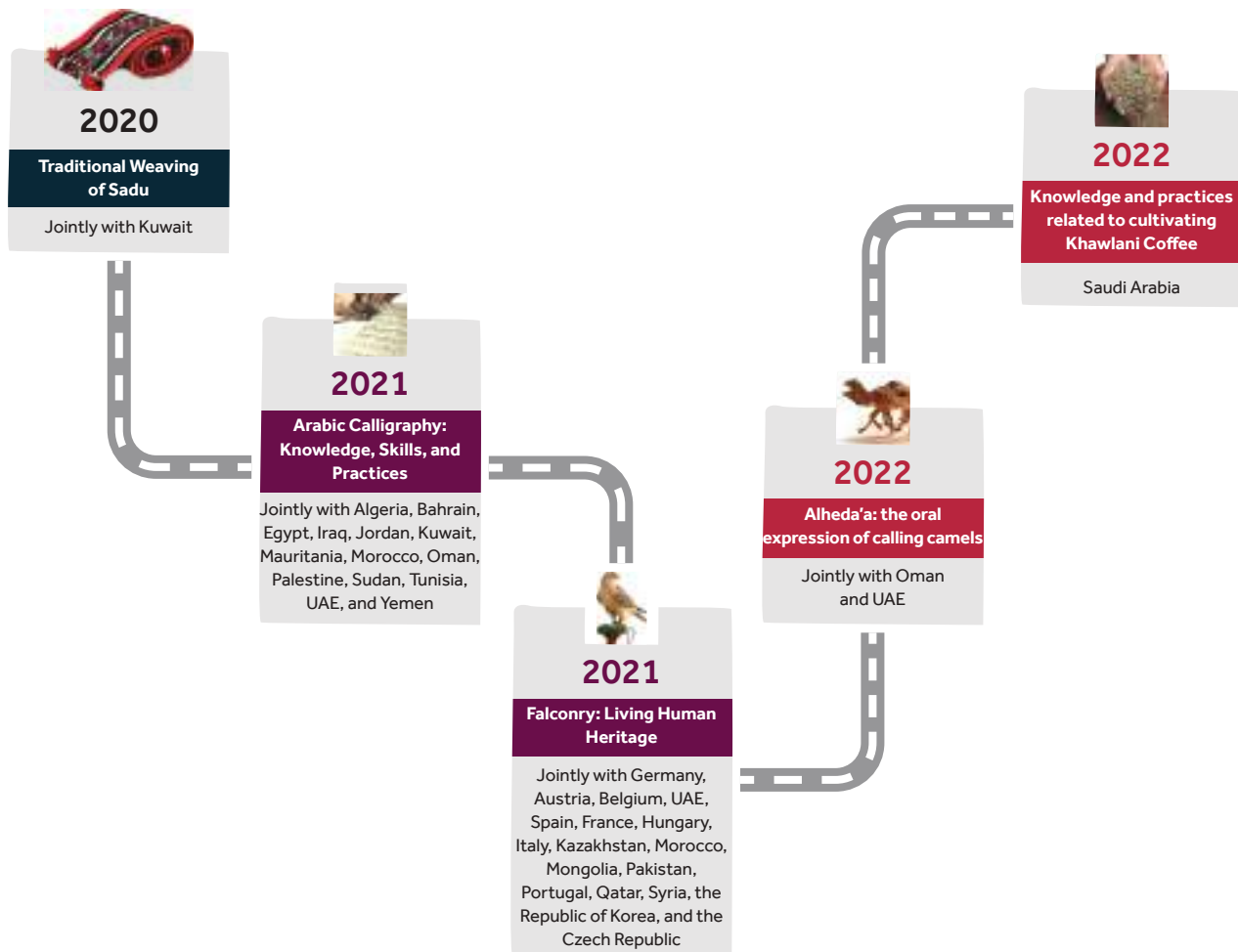


Figure 9: Elements of Saudi ICH Inscribed on the UNESCO Representative List of the Intangible Cultural Heritage of Humanity⁽²⁷⁾



Archiving of Creative Production

Archiving creative production occupies an essential position in the process of documenting cultural heritage. During the year, through the "Saudi Musical Memory" initiative, the Music Commission undertook the collection of 4,500 musical and lyrical works of Saudi music classics.⁽²⁸⁾ This initiative aims to set up a musical library encompassing the classics of Saudi music from the Kingdom's establishment up to the mid-1980s.⁽²⁹⁾ Meanwhile, the Theater and Performing Arts Commission continued archiving theatrical works within the "Theatrical Archive" project. During the year, 48 plays were archived, with the preservation of the visual representation of each play and the text and photographs of some of them.⁽³⁰⁾ Furthermore, the Misk Art Institute published four books within the "Art Library" initiative, shedding light on the works of four visual artists. These were Fahad Hajailan and Muhannad Shono from Saudi Arabia, Amina Agueznay from Morocco,⁽³¹⁾ and Salah Elmur from Sudan.⁽³²⁾ They form part of the group of eight books published by the Misk Art Institute within this initiative, launched in 2021 to be a historical record of art.⁽³³⁾

Protection and Sustainable Development

During the year, efforts to protect cultural and natural heritage were integrated with its sustainable development. ICH attracted several projects and initiatives to raise awareness of its importance and showcase this heritage. In this re-

spect, the MoC, in partnership with the Culinary Arts Commission, announced 2022, the Saudi Coffee Year to highlight this cultural tradition. The MoC led a series of projects to support the handicraft cultural industries and integrate the practitioners into the labor market, which is the best way to ensure the sustainable development of these industries. Likewise, many cultural heritage sites received attention through the continued development of a series of Islamic archaeological sites as well as through projects to develop historical areas. The most important of the initiatives for protecting natural heritage was the Saudi Green Initiative (SGI), which aims to increase vegetation and preserve biodiversity in Saudi Arabia.

Promoting ICH Visibility

"This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity."⁽³⁴⁾ There are many ways to actively promote this type of heritage, through raising awareness about its importance, showcasing it, and increasing its visibility. There was a marked growth in the focus of the Saudi government and private and non-profit organizations on raising awareness of and preserving intangible cultural heritage, which is abundant across Saudi provinces. As the Knowledge and Skills Chapter indicates, there has also been a notable increase in training cultural sector workers to

enhance their capabilities in ICH conservation despite no noticeable growth in private training institutions for the management of this heritage.

There were many government agency initiatives for ICH awareness raising, notably a national initiative aiming to educate students generally on the different fields of this heritage. The initiative, organized by the MoC in collaboration with the Ministry of Education, encouraged students, with support from their teachers, to compete in written and field research work about traditional performing arts, stories, games, dishes, and handicraft cultural industries, with recognition given to the best research.⁽³⁵⁾ Meanwhile, the annual "Diriyah, Bayt Al Ardah" initiative launched a competition and training to promote the performance of the Saudi Ardah dance, which is one of the ICH elements inscribed on UNESCO's relevant list. The Diriyah Gate Development Authority organized the initiative in partnership with the National Center for Saudi Ardah, part of the King Abdulaziz Foundation for Research Archives (Darah).⁽³⁶⁾ The competition "Colorful Houses of Asir," organized by the Heritage Commission, aimed to highlight heritage linked to the decoration and painting of local architecture in Asir Province. The competition involved painting seven houses in two of the province's villages, with the participation of families and visitors to the areas.⁽³⁷⁾ In order to preserve traditional arts, the Theater and Performing Arts Commission undertook an inventory of groups and practitioners of traditional arts in Saudi Arabia, with the aim of building a sector database that would contribute to facilitating assessment and development.⁽³⁸⁾

A model emerged from some of the projects of Public Investment Fund (PIF) companies for sustainable

development. This model aims to preserve tangible and intangible heritage enjoyed by areas of business and investment in cooperation with local communities. Under the collaboration agreement between Soudah Development, a company for developing tourism in Soudah and Rijal Alma'a, and Darah for preserving oral heritage related to community life in Soudah and Rijal Alma'a, 35 historical stories of the area's traditions were documented in cooperation with tribal elders, historians, and writers from the local community.⁽³⁹⁾ The "Souq Amerah" initiative in the city of Umluj organized a series of sessions with experts among the residents of Umluj governorate to highlight and display parts of the ICH of the province, such as wedding customs, traditional clothes, performing arts, and local industries like making sailboats, among others. Souq Amerah is a local market at which farmers, artisans of the handicraft cultural industries, and artists display their work and products. It is an initiative of Red Sea Global, a property development company in Red Sea and Amaala destinations.⁽⁴⁰⁾

In an endeavor to consolidate pride in Saudi coffee and the customs and values associated with it, the MoC, in partnership with the Culinary Arts Commission, announced the initiative of designating 2022 as the "Year of Saudi Coffee" as an umbrella term for a number of initiatives, campaigns, and ideas which the government and private entities presented to celebrate this cultural heritage throughout the year.⁽⁴¹⁾ The MoC developed an internet platform to publicize the initiative and its activities,⁽⁴²⁾ with many of the activities to promote the initiative being organized during the various events. The Commission also officially launched the Saudi coffee expert license as part of the Year of Saudi Coffee initiatives.⁽⁴³⁾



Table 2: Examples of ICH-Related Events, 2022

Festival	ICH Type	Organizing Body
Saudi Feast Food Festival ⁽⁴⁴⁾	National food heritage	Culinary Arts Commission
Festival of Najrani Cuisine ⁽⁴⁵⁾	Culinary heritage in Najran	Najran Society for History and Archaeology (JATEN)
Land of the Date Palm Initiative ⁽⁴⁶⁾	Heritage related to date palms	Emirate of Al-Qassim Province
Truffle Festival ⁽⁴⁷⁾	Traditions of collecting and cooking truffles related to Saudi cooking	Culinary Arts Commission, in partnership with the Royal Commission for Riyadh City
Qimam Mountain Performing Arts Festival ⁽⁴⁸⁾	Performing arts and painting specific to Saudi mountain regions	Theater and Performing Arts Commission
Southern Step Festival ⁽⁴⁹⁾	Traditional performing arts in the southern regions	Ministry of Culture
Second Oqailat Camel Auction Festival of Al-Qassim Province ⁽⁵⁰⁾	Cultural and community traditions related to camels	Emirate of Al-Qassim Province

Preservation of Handicrafts (Handicraft Cultural Industries)

Skills related to traditional craftsmanship are one of the ICH core components, and Saudi Arabia has an abundant and varied heritage of crafts and handicraft industries. Crafts previously inscribed on the Representative List of the Intangible Cultural Heritage of Humanity include the craft of Al-Qatt Al-Asiri, which is the traditional female art of decorating house interiors. Also on the list is the traditional weaving of Sadu. The Heritage Commission started a project to document traditional crafts, during which ten official craft fields were documented, including 36 subsectors, by the end of 2022.⁽⁵¹⁾ Support for the handicraft sector focuses on enabling artisans to be an economically active part of the local and international market through their training and empowerment in commercial activity tools. In an endeavor by the Heritage Commission to organize support for this sector, artisans were provided the opportunity to obtain a license to practice the production and sale of handicraft goods. This was done by providing the Abde'a Platform for licensing.⁽⁵²⁾ These efforts were accompanied by the regulation/organization of the artisan category, along with training for artisans on tools to preserve their creative and commercial rights, such as their awareness of intellectual property rights.⁽⁵³⁾ Furthermore, they were offered support to display their products in 37 sales outlets both within and outside Saudi Arabia in 2022. This complements the training that the Commission offered to artisans in 2020 through the "Digital Marketing Skills for Artisans" program.⁽⁵⁴⁾ This trend in the support offered to artisans by the Heritage Commission



aims to integrate them into the market. It corresponds with the support offered by some non-profit organizations like the Torathuna Social Responsibility Company, a non-profit company owned by Aramco, which provides artisans with the necessary tools to become entrepreneurs in the handicraft field.⁽⁵⁵⁾ Within this trend, Alwaleed Philanthropies offered the "Craftswomen Project," which aims to empower female artisans to be entrepreneurs.⁽⁵⁶⁾ This was in addition to the efforts of the "Souq Amerah Initiative," launched by Red Sea Global to train artisans in professional marketing.⁽⁵⁷⁾

Protection and Sustainable Development of Cultural Heritage Sites

Among the most notable developments in the protection and periodic maintenance of cultural heritage sites in 2022 were the fencing of 35 sites and the completion of the restoration and rehabilitation of 3 sites. Restoration works continued at eight other sites, in addition to emergency intervention and development support for dilapidated heritage buildings.⁽⁵⁸⁾ As part of specific work to study the state of heritage sites, Soudah Development, one of the PIF companies, carried out an aerial survey of the structural integrity of 27 heritage buildings in the Soudah area.⁽⁵⁹⁾ Meanwhile, in relation to restoring cultural heritage sites, the Heritage Commission had notable involvement with the local community in Asir in restoring some traditional houses through the “Colorful Houses of Asir” competition.⁽⁶⁰⁾

Among the most notable developments in sustainable development projects for cultural heritage sites was the “Historic Jeddah Revival” project, announced by HRH Prince Mohammed bin Salman bin Abdulaziz, Crown Prince and Prime Minister, in September 2021.⁽⁶¹⁾ This project aims to

develop the quality of life in the historic Jeddah area to make it an attractive center for businesses and cultural projects. In 2022, work was ongoing on the first stage of the project to develop and restore more than 50 houses, in addition to establishing several buildings as the headquarters for various cultural institutions and projects. Meanwhile, work on a project developing the area’s Gold Square was completed.⁽⁶²⁾ As for efforts to develop sites of Islamic history as cultural destinations, the first stage of a project to develop the Hira Cultural District, which lies at the foot of Mount Hira,⁽⁶³⁾ was completed. The project is being carried out under the supervision of the Royal Commission for Makkah City and Holy Sites. It includes an exhibition telling the story of the Revelation to the Prophet, peace and blessings be upon him, as well as a specialist library about the history of Makkah and Madinah.⁽⁶⁴⁾ Work also took place in developing the Jabal Thawr Cultural District, which includes a Prophet’s Hijra exhibition.⁽⁶⁵⁾ Among the most essential active measures taken to protect cultural heritage sites during the year was the creation of policies to activate these sites and encourage their contribution to sustainable development.⁽⁶⁶⁾ In this regard, government organizations concerned with heritage protection worked on developing cultural heritage sites to welcome visitors and use these sites in national and global events. The number of cultural heritage sites developed for visitors reached 58, including villages, castles, palaces, and various archaeological sites (Figure 10).⁽⁶⁷⁾ The Heritage Commission brought visitor centers at four heritage sites into operation⁽⁶⁸⁾ and organized the “Al-Ahsa Oasis” Festival at six heritage sites in Al-Ahsa in conjunction with the World Cup 2022 in Qatar.⁽⁶⁹⁾ The Heritage Commission also organized the “Noqush” initiative, which held various events at heritage sites in Riyadh over a month-long period,⁽⁷⁰⁾ in addition to using several heritage sites throughout Saudi provinces on Founding Day, National Day, and World Heritage Day.

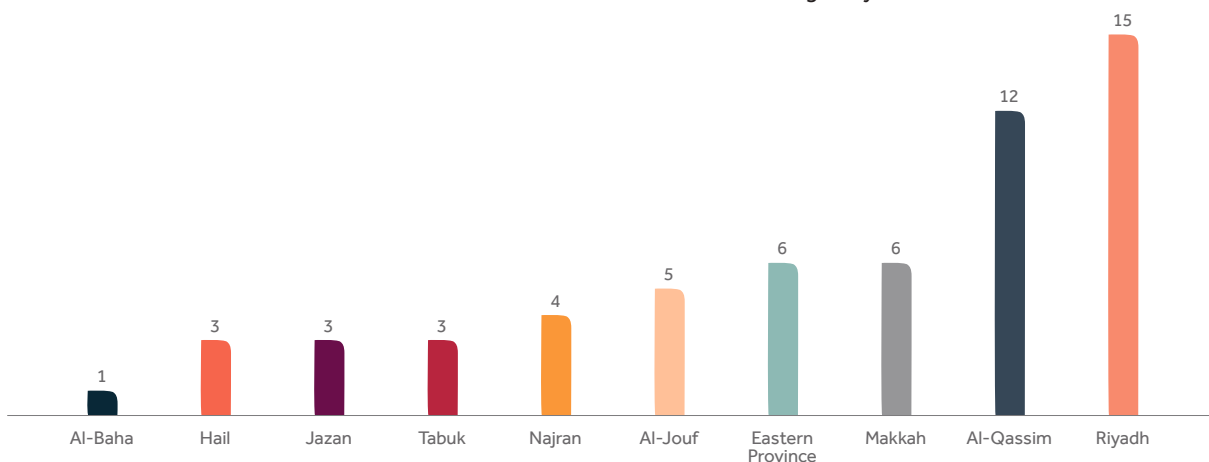


Figure 10: Number of Cultural Heritage Sites developed for Visitors and their Distribution across Saudi Provinces

Sustainable Development of Natural Heritage

The most notable developments in natural heritage protection during the year were the updates to the Saudi Green Initiative (SGI), the most important environmental initiative, launched in 2021 by HRH Prince Mohammed bin Salman bin Abdulaziz, Crown Prince, Prime Minister and Chairman of the Higher Committee for the Saudi Green Initiative.⁽⁷¹⁾ The initiative seeks to realize three main aims, namely reducing carbon emissions by more than 278 MTPA by 2030, planting 10 billion trees across all Saudi provinces, and protecting more than 30% of land and sea areas.⁽⁷²⁾ Saudi Arabia also announced its goal to plant more than 600 million trees by 2030, an increase of 150 million to the interim target announced in 2021 to plant 450 million trees by 2030.⁽⁷³⁾ The National Center for Vegetation Cover Development and Combating Desertification (NCVC) began work on the SGI studies project to build a comprehensive strategic blueprint and a national plan for tree planting.⁽⁷⁴⁾

Many of the government and private sector initiatives have sought to realize the SGI goals, such as the "Green Makkah" initiative⁽⁷⁵⁾ and the "Green Riyadh" project,⁽⁷⁶⁾ as well as the "Green Opportunities" grant, which the King Khalid Foundation launched with the aim of supporting organizations and projects in sectors which contribute to achieving sustainable development and protecting the environment.⁽⁷⁷⁾

In terms of Saudi's continued aim to increase the rate of protected areas to more than 30%, in 2022, there were 38 protected areas across Saudi provinces (Table 3), covering a total area of 348,421.630 km² compared with 211,481,580 km² in 2021. The percentage of protected land area represented 16.85% of Saudi Arabia compared with 15.56% the year before.⁽⁷⁸⁾ This means that Saudi Arabia has almost protected 17% of its land and inland water, which was the target committed under the United Nations Convention on Biological Diversity (CBD) in 2001.⁽⁷⁹⁾

Table 3: Number and Area of Reserves in Saudi Arabia, 2022⁽⁸⁰⁾

Reserve Division	Number of Reserves	Reserve Area (km ²)	Percentage of Area of Land Reserves to the Economic Water Area	Percentage of Area of Marine Reserves to the Economic Water Area	Percentage of Marine Reserve Areas in Saudi Arabia
National Wildlife Center Reserves	10	25,210.53	1.26%	7,433.03	3.4%
Royal Reserves	7	285,854.07	14.29%	3,875	1.7%
Reserves of Royal Commission for AlUla	5	12,575	0.63%	-	
Reserves managed by other entities	16	13,474	0.67%	-	
Total	38	337,113.6	16.86%	11,308.03	5.1%

Table 4: Reserves on World Lists and Their Area⁽⁸¹⁾

	Reserve	Area (km ²)	Global Program
1	Farasan Islands	5,769	UNESCO Man and the Biosphere (MAB) program
2	Harrat Uwayrid	4,742	UNESCO Man and the Biosphere (MAB) program

As part of Saudi Arabia's efforts to protect endangered species, the Council of Ministers issued a decree designating February 10 as the Annual Day of the Arabian Leopard, aiming to shed light on the dangers faced by Arabian leopards and spread awareness of the importance of preserving them. HRH Prince Mohammed bin Salman bin Abdulaziz, Crown Prince, Prime Minister, and Chairman of the Board of the Royal Commission for AlUla, directed the establishment of the Global Fund for the

Arabian Leopard in February 2019, and the Royal Commission for AlUla put in place a preservation strategy for the Arabian leopard. This encompassed a diverse series of initiatives, including expanding the breeding program by opening an Arabian leopard center in the Sharaan Nature Reserve.⁽⁸²⁾ Within its program for breeding and reintroducing endangered species, the National Center for Wildlife (NCW) released more than 1,200 wild animals into nature reserves and parks.⁽⁸³⁾





















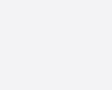






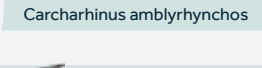



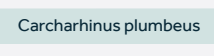



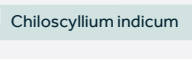

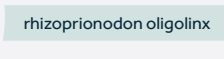

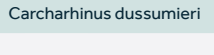

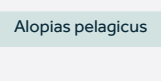

Scientific Name	English Name
 Balaenoptera edeni	Bryde's Whale
 Balaenoptera acutorostrata	Minke Whale
 Megaptera novaeangliae	Humpback Whale
 Pseudorca crassidens	False Killer Whale
 Physeter macrocephalus	Sperm Whale
 Delphinus cf. tropicalis	Indo-Pacific Common Dolphin
 Grampus griseus	Risso's Dolphin
 Sousa chinensis	Indo-Pacific Humpbacked Dolphin
 Stenella attenuata	Pantropical Spotted Dolphin
 Stenella longirostris	Spinner Dolphin
 Tursiops aduncus	Indo-Pacific Bottlenose Dolphin
 Tursiops truncatus	Common Bottlenose Dolphin
 Orcinus orca	Orca (Killer) Whale
 Steno bredanensis	Rough-Toothed Dolphin
 Globicephala macrorhynchus	Short-Finned Pilot Whale
 Stenella coeruleoalba	Striped Dolphin
 Dugong dugon	Dugong
 Scleractinia and Alcyonacea	All types of hard and soft coral
 Chelonia mydes	Green Sea Turtle
 Erthmochetys imbricate	Hawksbill Sea Turtle
 Caretta caretta	Loggerhead Sea Turtle

Figure 13: List of Marine and Coastal Animals under Protection Measures⁽⁸⁴⁾

Scientific Name	English Name
 <i>Lipdochelys olivacea</i>	Olive Ridley Sea Turtle
 <i>Dermochelys coriacea</i>	Leatherback Sea Turtle
 <i>Carcharhinus longimanus</i>	Oceanic Whitetip Shark
 <i>sphyrna lewini</i>	Scalloped Hammerhead
 <i>Sphyrna mokarran</i>	Great Hammerhead
 <i>Galeocerdo cuvier</i>	Tiger Shark
 <i>Carcharhinus amblyrhynchos</i>	Grey Reef Shark
 <i>Carcharhinus limbatus</i>	Blacktip Shark
 <i>Rhincodon typus</i>	Whale Shark
 <i>Carcharhinus falciformis</i>	Silky Shark
 <i>Carcharhinus plumbeus</i>	Sandbar Shark
 <i>Triaenodon obesus</i>	Whitetip Reef Shark
 <i>Negaprion acutidens</i>	Sicklefin Lemon Shark
 <i>Pristis</i>	Sawfish (multiple species)
 <i>Chiloscyllium indicum</i>	Slender Bamboo Shark
 <i>Chaenogaleus macrostoma</i>	Hooktooth Shark
 <i>rhizoprionodon oligolinx</i>	Grey Sharpnose Shark
 <i>Carcharhinus leucas</i>	Bull Shark
 <i>Carcharhinus dussumieri</i>	Whitecheek Shark
 <i>Carcharhinus albimarginatus</i>	Silvertip Shark
 <i>Alopias pelagicus</i>	Pelagic Thresher
 <i>Hemigaleus microstoma</i>	Sicklefin Weasel Shark

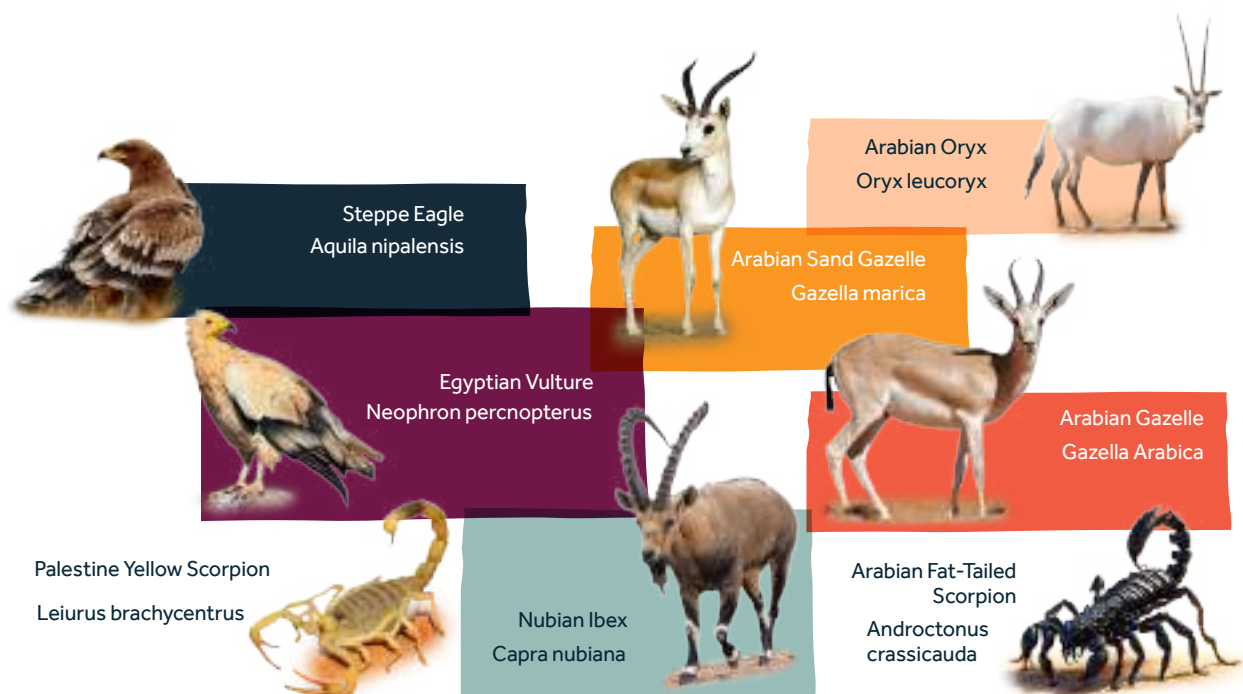


Figure 14: List of Land Animals under Protection Measures⁽⁸⁵⁾

Facilities and Infrastructure

In the context of meeting cultural development targets and the importance of keeping up with the requirements of cultural activities in Saudi Arabia, the development of infrastructure, a

core condition for enabling cultural production capabilities and widening cultural participation, continued. But unlike other developments, infrastructure developments depend, in most cases, on long-term investment, and accordingly, progress is shown at longer intervals. Therefore, infrastructure indicators in this chapter do not present a detailed picture like those that the previous reports covered. However, the focus has been on tangible developments rather than elaborating on the state of facilities, which have not seen significant changes.

Overview

One of the most significant developments in cultural facilities in 2022 was the increased involvement of the private sector. This included investments in new cinemas and the expansion of existing cultural activity facilities through partnerships between the public and private sectors, such as the expansion of literary cafés. The government also continued to upgrade infrastructure and cultural facilities, with construction work ongoing in sectors such as museums, theaters, and libraries. Additionally, planning and organization work continued, including the development of standards and specifications for facilities, which some commissions are working on in their respective mandates.



The library sector is notable in terms of the organizational developments it has gone through, including redefining cultural assets and how they are used. In this regard, the Libraries Commission worked on restructuring public libraries, with the relevant powers moved to the MoC from the Ministry of Media. The Commission also worked on upgrading some libraries that were suffering from a lack of equipment (see 2019 report) and developing new libraries. In addition to this, the Commission undertook the development of new

models for cultural facilities by transforming some libraries into multipurpose cultural centers. Due to ongoing development, these still need to offer functional services, and there has been no launch of significant construction in this sector. The same applies to the museum sector, which is still waiting to launch several promising projects that are yet to be fully implemented. Therefore, there was no change to mention in the number of public museums, with a slight decrease in licensed private museums from 236 to 234.

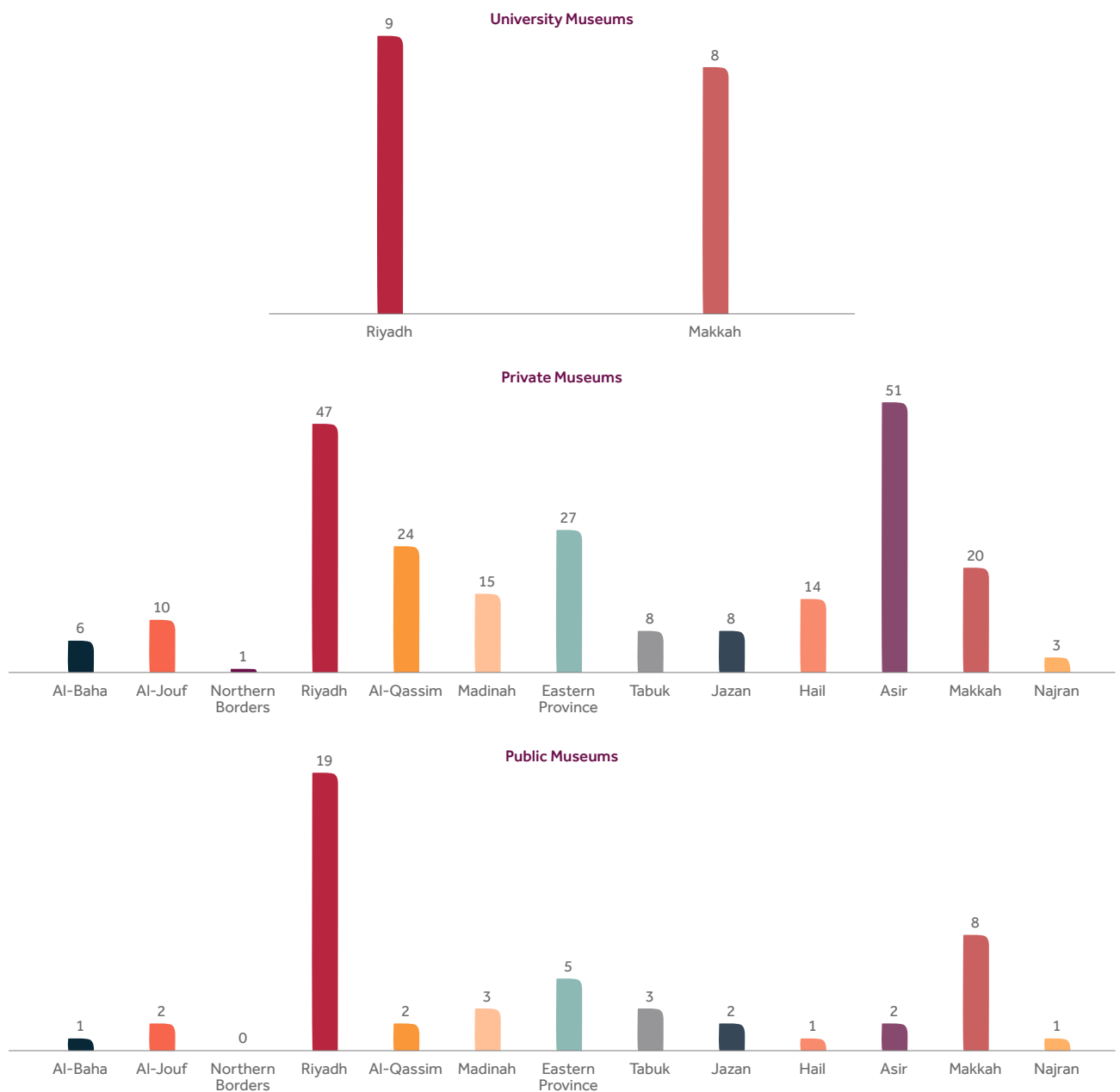


Figure 15: Distribution of Public, Private, and University Museums by Province, 2022

Continued Growth in the Number of Movie Theaters

The number of movie theaters continued to grow rapidly in 2022, increasing by 9% to reach a total of 63 in 2022, with the opening of 9 new theaters. The number of screens reached 581, i.e., an average of almost 18 screens for every million inhabitants. However, this increase is not proportionally reflected across the provinces, with 2022 witnessing no movie theaters in provinces where none already exist, such as Al-Baha, Madinah, Al-Jouf, and Najran.

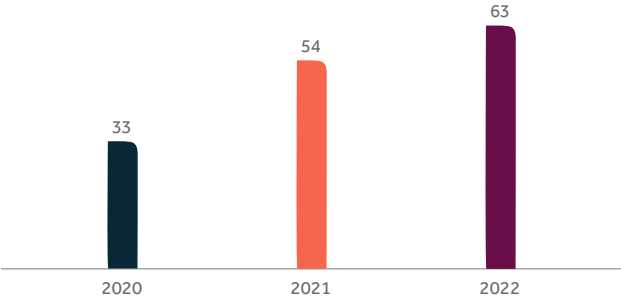


Figure 16: Number of Cinemas in Saudi Arabia, 2020-2022

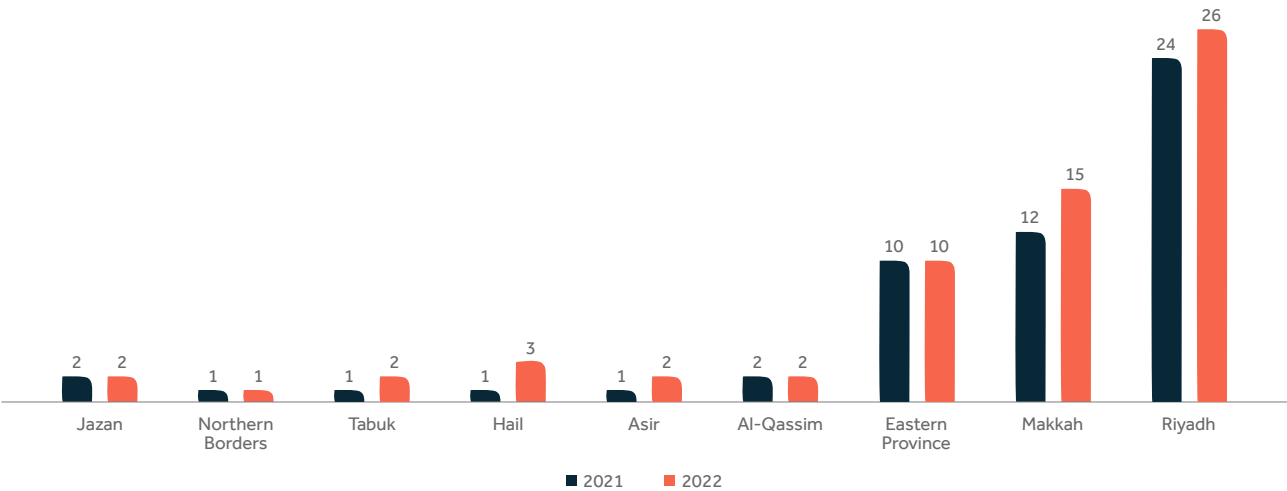


Figure 17: Distribution of Cinemas by Province, 2021-2022





Literary Cafés as Cultural Facilities

The Literary Partner Initiative presented an example of utilizing existing areas and facilities and supporting their investment in promoting cultural activities. This initiative achieved tangible success, reflected in the growth in the number of literary cafés in partnership with the Literary

Partner Program, with 46 cafés in 2022 compared to 20 in the year before. Furthermore, the initiative expanded to five provinces where there had been no participating cafés the previous year. These were Al-Baha, Northern Borders, Al-Jouf, Jazan and Najran. The most significant growth was in the Eastern Province, where 11 cafés participated in the program compared with two the year before.

Table 5: Distribution of Literary Cafés by Province, 2021-2022

Province	2021	2022
Riyadh	6	12
Eastern	2	11
Tabuk	1	3
Makkah	5	5
Madinah	2	5
Al-Qassim	1	0
Asir	2	2
Hail	1	1
Al-Baha	0	1
Jazan	0	2
Al-Jouf	0	1
Najran	0	1
Northern Borders	0	2

Empowerment and the Organizational Framework

Organizational Developments in the Cultural Sector

Organizational frameworks and cultural policies are essential enablers of strengthening the institutional building of the cultural sectors, ensuring their sustainability and effectiveness in stimulating production and creativity, and raising the levels of cultural participation in public life and the national economy to achieve the aspirations of Vision 2030. In recent years, the cultural sector has seen substantial organizational activity, represented in the establishment of cultural commissions and institutions, as well as updates to the relevant laws to reflect these developments. In conjunction with these changes, there continued to be a transfer of cultural functions to newly established cultural organizations, which is the most notable feature in the organization of the cultural scene. Regarding these developments, the year began with the issue of a Royal Decree, which added a new national holiday to the Saudi Cultural National Days calendar on February 22 to celebrate the establishment of the first Saudi state by Imam Muhammad bin Saud, with this day being celebrated in Saudi Arabia for the first time in 2022.⁽⁸⁶⁾

Regulations and Decisions Supporting Culture

The cultural sectors have witnessed the adoption of several sub-regulations represented by the issuance of the implementing regulations that define the rules and work regulations in the context of transferring new functions to the cultural commissions. The most notable of these were regulations relating to the heritage and museum sectors after the supervision authority for the Antiquities, Museums, and Urban Heritage Law was moved from the tourism to the cultural sector. In February 2022, new implementing regulations were adopted for the Antiquities, Museums, and Urban Heritage Law by a ministerial resolution. These encompassed an implementing regulation for antiquities and urban heritage that designated the Heritage Commission as the entity of authority and another implementing regulation for museums that confirmed the Museums Commission as the responsible authority. These were in addition to two joint regulations, one related to rules on control and inspection of violations of the Law and the other governing the Antiquities, Museums, and Urban Heritage Fund designated to support and empower both sectors.⁽⁸⁷⁾

To enhance the preservation of rights in the cultural sectors, in the middle of 2022, the Saudi Authority for Intellectual Property (SAIP) issued amended implementing regulations to the Copyright Law, which included modernization of the



terminology and amendment of the control and inspection measures, as well as the addition of electronic inspection controls, in response to modern-day requirements. These measures will increase the effectiveness of the protection designated for creative and artistic production, leading to the motivation of innovators and the development of the cultural industries.⁽⁸⁸⁾

After moving the Historic Jeddah Project program to the MoC the year before,⁽⁸⁹⁾ a Council of Ministers resolution was issued to extend the length of the project by two additional years and empower the providers to apply the sanctions enshrined in the sanctions regulation with regard to municipal violations.⁽⁹⁰⁾ The Council of Ministers also issued a resolution that stipulated moving the function for film activities from the General Commission for Audiovisual Media to the Film Commission, with the MoC being granted, by resolution of the Council of Ministers, authority for offering grants and non-refundable incentives to the film sector.⁽⁹¹⁾

In the architecture and design sector, in July 2022, the Sports Boulevard Foundation launched the design code for areas



located on Prince Muhammad bin Salman bin Abdulaziz Road in Riyadh, represented by a series of manuals. These have been published as a reference guide for owners of commercial and residential property to understand the necessary urban and architectural requirements, controls, and conditions to follow in the surrounding buildings.⁽⁹²⁾

Table 6: Regulations on Cultural Sectors issued in 2022⁽⁹³⁾

Resolutions and Regulations	Date
Announcement of a national holiday for Founding Day	January 2022
Designation of February 10 as the Annual Day of the Arabian Leopard	January 2022
Implementing Regulations for Antiquities and Urban Heritage	February 2022
Implementing Regulations for Museums	February 2022
Implementing Regulations for the Antiquities, Museums, and Urban Heritage Fund	February 2022
Implementing Regulations for the Investigation, Control, and Study of Violations of the Antiquities, Museums, and Urban Heritage Law	February 2022
Agreement to modify the organization of the King Abdulaziz Complex for Endowment Libraries	March 2022
Implementing Regulations of the Copyright Law	June 2022
Design code manuals for Sports Boulevard	July 2022
Tourism Law	August 2022
Establishment of the Saudi Investment Marketing Authority	August 2022
Moving film activity functions from the General Commission for Audiovisual Media to the Film Commission	September 2022
Change of ownership of the Visitor Center at Al-Faw Archaeological Site in the Wadi Al-Dawasir Governate from King Saud University to the Heritage Commission	October 2022

Abde'a Platform Licenses

In line with the efforts to organize the cultural sector, in December, the MoC announced the launch of the third stage of the unified electronic licensing platform for cultural licensing, "Abde'a." This added the licensing of training institutes and higher training institutes⁽⁹⁴⁾ to the list of licenses that the platform issues for practitioners of various cultural sectors (Table 7).

Table 7: List of Cultural Licenses Available on the Abde'a Platform, 2022⁽⁹⁵⁾

Cultural Sector	Service Name
Theater and Performing Arts Commission	Performance Artist License
Music Commission	Musical Practitioner License
	Musical Production Practitioner License
	Music Acoustics Practitioner License
Literature, Publishing, and Translation Commission	Literary Agency Activity License
	Literary Agent License
Museums Commission	Museum Collection Care Expert License
	Private Museums License
	Public Museums License
Heritage Commission	Handicraft Shop License
	Craftsman License
Culinary Arts Commission	Saudi Coffee Expert License
	Water Sommelier license
	Traditional Food License
	Registration and Classification Service for Traditional Restaurants
Libraries Commission	Library Services License
Visual Arts Commission	Visual Arts Gallery License
Ministry of Culture	Training Establishment License
	Training Program Approval and Activation License

The number of licensed establishments was 114 in 2022, with most of them obtaining Training Establishment Licenses in addition to Training Program Approval Licenses (Figure 8). Most licensed establishments were concentrated in three provinces, with 51 in Makkah, 37 in Riyadh, and 14 in the Eastern Province.⁽⁹⁶⁾

Table 8: Number of Institutions and Establishments Licensed through Abde'a Platform, 2022

License Name	Number of Licensed Establishments
Training Program Approval and Activation License	51
Training Establishment License	50
Literary Agency Activity License	5
Handicraft Shop License	4
Public Museums License	2
Private Museums License	1
Library Services License	1
Registration and Classification Service for Traditional Restaurants	0
Visual Arts Gallery License	0



In terms of licensing practitioners in the cultural sectors, the number licensed through the Abde'a Platform this year was 682, with handicraft cultural industries practitioners making up 93% of these. Meanwhile, the rest were distributed

across the other cultural sectors (Table 9). As for gender distribution, 69% of all practitioners were female, with a total of 473 in all cultural sectors, compared to 209 male practitioners.⁽⁹⁷⁾

Table 9: Number of Practitioners Licensed through Abde'a Platform, 2022

License Name	Number of Licensees	Female	Male
Craftsman License	636	468	168
Musical Practitioner License	15	1	14
Saudi Coffee Expert License	13	2	11
Performance Artist License	6	0	6
Water Sommelier License	6	1	5
Literary Agent License	4	1	3
Musical Production Practitioner License	2	0	2
Total	682	473	209

Supporting Culture and Creativity

Cultural entities in Saudi Arabia, notably the Cultural Development Fund (CDF), established by a Royal Decree in 2021, as well as the cultural commissions and other bodies of the government and private sectors, offer several

programs to support and enable cultural activities, creative professionals, and those involved in the cultural sector. This support is a direct reflection of the regulatory/organizational developments that the Saudi cultural scene has undergone. This chapter examines two main types of support offered this year, which are financial support, such as grants, project funding, and cash prizes, and non-financial support, such as training, upskilling, and investment opportunities, provided through accelerator and incubator programs. In 2022, there was a noticeable development in support programs, represented by an increase in support beneficiaries and an expansion of programs offered.

Funding and Support Funds

The Cultural Fund (CDF) continues its support of cultural projects and activities, with expansion in programs and an increase in beneficiary projects. As such, the Fund offered support to 28 projects this year through the Cultural Projects Incentive Program, compared with only four projects supported by the program in 2021.⁽⁹⁸⁾ As seen in Table 10, it was noticeable that cinema and filmmaking projects took the lead with 35.7% of the total supported projects this year, followed by publishing projects with 21.4%, then culinary arts with 10.7%, and finally projects in the music and visual arts sectors with 7.14%. It is worth mentioning that the Cultural Projects Incentive Program was the first of the





programs launched by the CDF since its establishment in partnership with the Quality-of-Life Program, with a budget of SAR 177.75 million. In 2022, the CDF also offered funding to cultural projects worth SAR 259 million, spread across 41 grants and 36 guarantees offered by the CDF during the year.⁽⁹⁹⁾ Moreover, the Social Development Bank is among the entities that support and fund individuals and businesses in the cultural sector. It offered support to 26 entrepreneurs in the cultural sector in 2021-2022, which was a total of SAR 12 million (Figure 18).⁽¹⁰⁰⁾ The Bank's support programs benefited 2,306 families involved in production related to traditional food activities, handicraft cultural industries, and fashion, with 19% of them in Madinah Province, followed by Makkah and Eastern Provinces with 17% and 13%, respectively (Figure 19).

Table 10: Projects Supported by the Cultural Fund within the Cultural Projects Incentive Program, 2022⁽¹⁰¹⁾

Project	Outcomes
HTMi Saudi Arabia	Programs of accredited training in culinary arts
Mozn	Arabic language processing system (Mobin)
Al-Hamalun	Establishment of an incubator for cultural works in Khobar
CineWaves Films	Setting up of cinemas in Riyadh city
Thmanyah	Production of a series of short cultural films about Saudi culture (24 films)
Telfaz 11	Production of 216 episodes in 6 programs about Saudi culture
Studi Production Training SPT	Training programs in filmmaking
Saudi Academy of Film	Virtual training programs in filmmaking
Adab	Printing and publishing of 100 books by Saudi Authors
Minhaj	Establishment of a musical academy for children and those with special needs
Arbab Alheraf	Cultural center for holding events and fostering talent
Fennec	Training programs in theatrical and performing arts
Beit Almusica	Specialist Music Teaching Center
Hakawati	Production of a story series about the discovery of Saudi oil
Desert Publisher	Issue and publishing of an illustrated book about Saudi heritage in several languages

Project	Outcomes
ZADK Academy	Accredited training programs in culinary arts
Yaqoot	Issuing and publishing 15 books of illustrated stories for children, a series of five illustrated stories in biography literature
Madinah Art Center	Holding art exhibitions and gatherings
Elite Chefs Center	Training programs in culinary arts
The Studio	Offering printing, display, and marketing services for artistic works
Harf Agency	Translation of books into Arabic, production of podcasts about publishing, turning print books into audiobooks
Al-Ahfad Advertising Company	Cultural and educational content for children
Seen Design	Design of products with Saudi cultural identity
Plot Point1	Film production
Mahmoud Abdul-Ghani Sabbagh	Film production
Dusty Dimond	Film production
Shareet	Film production



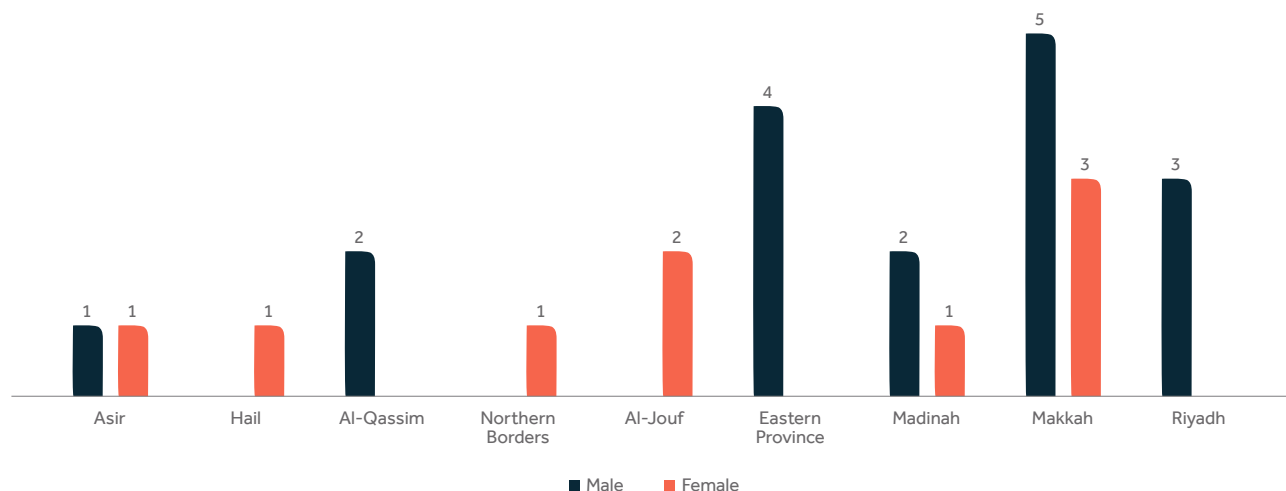


Figure 18: Number of Cultural Sector Entrepreneurs Beneficiaries of the Social Development Bank's Support, 2021-2022⁽¹⁰²⁾

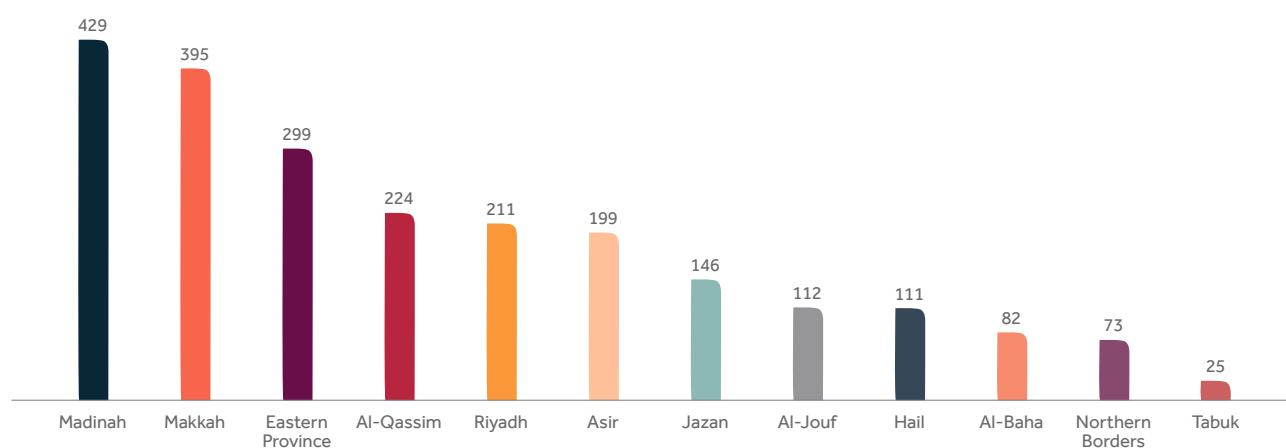


Figure 19: Number of Projects of Families Involved in Cultural Production Beneficiaries of the Social Development Bank's Support by Province

The film sector has attracted programs dedicated to supporting and empowering the industry in Saudi Arabia. Among the most notable is the Film Sector Financing

Program, which the Cultural Fund announced in early 2022 with a budget estimated at SAR 879 million. Of the budget, 70% is intended for the production and distribution of content, while 30% is allocated to developing infrastructure for the film sector.⁽¹⁰³⁾ Meanwhile, the Red Sea Fund provides support for film projects within the three pathways of project development, projects in progress, and production, with grants of up to 500 thousand dollars for each project. In 2022, 68 films received support from the Fund, 12 of which were Saudi films, representing almost 18% of the total films supported (Table 12). Additionally, the Red Sea International Film Festival Foundation offered support to 5 projects this year through Red Sea Lab – including the Lodge and Klinik Projects – and the Red Sea Souk, with a total value of US\$ 260 thousand.⁽¹⁰⁴⁾



Table 11: Most Notable Support Programs for the Film Sector in Saudi Arabia⁽¹⁰⁵⁾

Program Name	Entity	Support Value
Film Sector Financing Program	Cultural Fund	A budget of SAR 879 million
Financial Cashback Incentive program	Film Commission	Up to 40% of eligible expenses to drive supporting film production
Financial Cashback Incentive program	NEOM	Up to 40% to support the production of films and television works
Ithra Film Support Fund	Ithra	Maximum support of SAR six million for feature-length films and SAR 200 thousand for short films
Red Sea Fund	Red Sea International Film Foundation	Grants of up to 500 thousand dollars for each project
Red Sea Labs	Red Sea International Film Foundation	Grants and awards with a total value of US\$ 200 thousand

Table 12: Saudi Films Supported by the Red Sea Fund, 2022

Film	Production Country	Director	Classification
Slave	Saudi Arabia	Mansour Assad	Feature-length
Before You Leave	Saudi Arabia, Japan, and Indonesia	Razan Alsoghayer and Hala Alhaid	Animation
Hayat Yousef	Saudi Arabia	Feras Almusharria	Feature-length
Hejj to Wonderland	Saudi Arabia	Maha Al-Saati	Feature-length
Lithium	Saudi Arabia	Talha and Amro bin Abdulrahman	Feature-length
Gathering	Saudi Arabia	Waleed Alqahtani	Short Feature
Red Eye	Saudi Arabia	Mohammad Jastaniah	Short Feature
University Girl	Saudi Arabia	Ali Alsarheed	Short Feature
Habibi and I in Eden	Saudi Arabia and Qatar	Sara Mesfer	Short Feature
Miss Camel	Saudi Arabia	Haifaa Al Mansour	Animation
Al-Daar	Saudi Arabia	Abdullah Bamajboor	Feature-length
Norah	Saudi Arabia	Tawfik Alzaidi	Feature-length



Grants

In a specific development for grant programs in the cultural fields, 2022 witnessed the launch of several research and knowledge grants. The first of which was the 1139 Founding Day Research Grant, launched by the MoC on the announcement of Founding Day as a national holiday. The grant identified four research fields: research and studies on the historical period 1139–1233 AH; research chronicling the establishment of the first Saudi state; research and studies about the role of Founding Day in strengthening Saudi national identity; and finally, critical research and studies about historical sources and documents which covered this period. Out of 93 research projects submitted to the grant, eight were accepted.⁽¹⁰⁶⁾ The MoC also announced grants for

research on Saudi coffee in cooperation with the Saudi Coffee Company, with 159 research projects submitted, of which twenty were accepted.⁽¹⁰⁷⁾ The grant aims to support research in three fields: coffee in Arabia, ICH related to Saudi coffee, and the development of local cultural content. The Literature, Translation, and Publishing Commission offered grants for research and studies in the translation field, identifying several research priorities. These priorities were artificial intelligence (AI) and machine translation (MT), audiovisual translation, translation in the intercultural context, translation databases, and localization/ Arabicization, among others. In terms of arts grants, the Misk Art Institute offered the third edition of the Misk Art grant, titled “Saraab,” worth SAR one million, with two male artists and four female artists benefitting from it.⁽¹⁰⁸⁾ Meanwhile, the Visual Arts Commission offered the Kingdom Grant for professional photography.⁽¹⁰⁹⁾

As for projects and establishments, the Literature, Publishing, and Translation Commission continues offering translation grants within the Tarjim Initiative; this year saw an expansion of the program, which was reflected in the number of translated works, as mentioned in the Creativity and Cultural Production Chapter. The second edition of the initiative aimed to offer 500 grants,⁽¹¹⁰⁾ compared to 292 in 2021.⁽¹¹¹⁾ Within the translation support track in the Ithra Content initiative, Ithra offered translation grants in five fields: literary books, historical books, philosophy books, non-university science books, and economic books. The grant was a maximum of SAR 200,000 to 300,000 for each project.⁽¹¹²⁾ In the environmental field, this year, the King Khalid Foundation launched the Green Opportunities grant,⁽¹¹³⁾ which targeted projects in the non-profit sector, with a total value of up to SAR 620,000. Three entities received the grant: the Saudi Arabian Botanical Society for the “Rare Things” Project, the Al-Shuaba National Development Association for the “Fronds” Project, and the Society for Social Responsibility in Jeddah Governorate for the “Green Shops” Project.⁽¹¹⁴⁾

Table 13: Sample of Research Grant Initiatives Offered in 2022

Grant	Entity
1139 Founding Day Research Grants	Ministry of Culture
Grants for Research and Studies in the Translation Field	Literature, Publishing, and Translation Commission
Philosophy Research Grants	Philosophy Association and Saudi Center of Philosophy and Ethics with support from the Literature, Publishing and Translation Commission
Saudi Coffee Research Grants	Ministry of Culture in cooperation with Saudi Coffee Company
Art Jameel Research Grant	Art Jameel

Art and Literary Residencies

While the Knowledge and Skills Chapter looks at programs of art residencies within cultural training developments and their non-traditional forms,⁽¹¹⁵⁾ this chapter focuses on art and literary residencies as a form of intangible support and a creatively stimulating environment for artists and writers. For example, this year, there were four cycles within the Al-Balad Art Residencies Program, organized by the MoC in Historic Jeddah and held virtually for the first time in 2021. The Visual Arts Commission organized the first of its art residency programs in cooperation with the Fashion Commission under the title “Art and Fashion Reimagined.” As for the Misk Art Institute, it organized three cycles of the “Masaha

Residency” and four cycles of international residencies, two of which were organized in Germany and two in Argentina. The number of beneficiaries of art residencies this year was 100, compared with 74 in 2021, representing an increase of approximately 35%. This chapter also observed a rise in the percentage of female artists participating in art residencies (Figure 20), with female artists representing 61% of all participants in 2022, compared with 54% in 2021.⁽¹¹⁶⁾ As for the writing retreats organized by the Literature, Publishing, and Translation Commission, the proportion of women did not exceed 38% of the total participants. As seen in Figure 21, three retreats were held in Al-Qassim, Al-Baha, and Asir, respectively, compared to two the year before.⁽¹¹⁷⁾

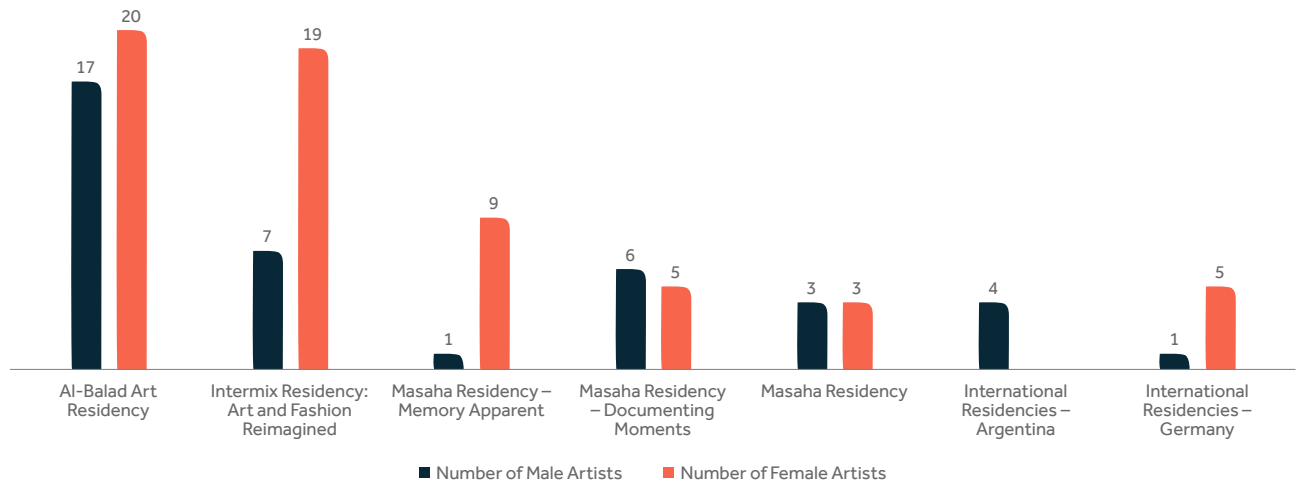


Figure 20: Art Residencies and Number of Beneficiaries by Gender, 2022⁽¹¹⁸⁾



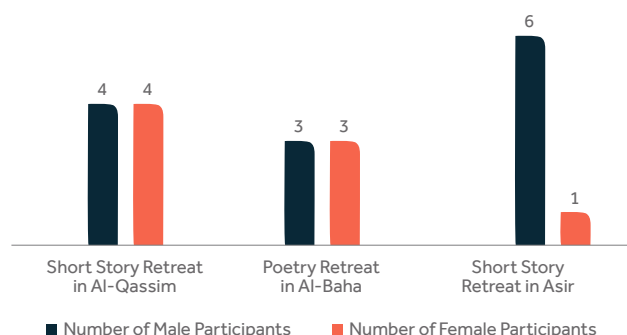


Figure 21: Writing Retreats and Number of Participants by Gender, 2022⁽¹¹⁹⁾

Incubators and Business Accelerators

In the past two years, incubators and business accelerators have emerged as significant developments in non-financial support for cultural projects across various sectors. These programs are designed to empower cultural projects through training programs, advisory sessions, investment opportunities, funding, and potential partnerships. The Children and Adolescents' Literature Accelerator was the

first of these accelerators, and the Literature, Publishing, and Translation Commission announced the start of registration at the end of 2021. Ten projects qualified to participate, and they were offered 15 training workshops within the accelerator programs.⁽¹²⁰⁾ In 2022, the Commission initiated the Publishing Works Accelerator program. The program's objective was to support and nurture 20 projects in the paper and electronic publishing domains. Participants were eligible for financial grants, and the top-ranked candidates were given the opportunity to attend the Commission's international training program for publishing houses.⁽¹²¹⁾

During the year, four incubators were launched, two of which were organized by the Culinary Arts Commission and involved 21 participants. The Theater and Performing Arts Incubator was also launched to develop start-ups in the theater sector. The incubator program focused on basic training, as well as connecting participants with related organizations and supporting them in finding investment and funding opportunities. The Royal Institute of Traditional Arts, in partnership with the Social Development Bank, organized the Traditional Arts Incubator. It is worth noting that almost 80% of all participants in these incubators were women (Table 13).

Table 13: Incubators Offered and Number of Beneficiaries, 2022

Incubator	Number of Male Participants	Number of Female Participants	Entity
Kawin Culinary Arts Incubator ⁽¹²²⁾	2	9	Culinary Arts Commission
Culinary Arts Incubator ⁽¹²³⁾	2	8	Culinary Arts Commission
Theater and Performing Arts Incubator ⁽¹²⁴⁾	12	9	Theater and Performing Arts Commission
Incubator for Traditional Arts Businesses ⁽¹²⁵⁾	1	14	Royal Institute of Traditional Arts, in partnership with the Social Development Bank



Cultural Competitions and Prizes

Cultural competitions are one of the forms of support tracked by the report, as these prizes contribute to stimulating and supporting cultural and creative production and activity, whether offered to individuals or establishments. Cultural prizes were launched for the first time this year, and among the most notable were the Prince Khalid Al-Faisal Prize for Language of the Holy Qur'an, with prizes reaching SAR two million, as well as the KSGAAL Prize, with prizes valued at SAR 1.6 million. While the chapter on Creativity and Cultural Production examines the winning businesses, presenting information about their subjects, trends, and specifications

indicative of creativity,⁽¹²⁶⁾ it is essential to also display them here as an indicator of support and empowerment, focusing on the number of winners and total prize amounts (Table 14).

Table 14: Sample of Most Notable Cultural Prizes and Number of Winners, 2022

Prize	Organizing Entity	Number of Winners	Total Prize Value ⁽¹²⁷⁾
King Salman Global Academy for the Arabic Language Prize	King Salman Global Academy for the Arabic Language	8	1,600,000
Prince Abdullah Al-Faisal Prize for Arabic Poetry	Academy of Arabic Poetry	7	1,200,000
King Abdullah Bin Abdul-Aziz International Translation Prize	King Abdulaziz Public Library	11	7,500,000
Prince Khalid Al-Faisal Prize for Language of the Holy Qur'an	Makkah Province, in partnership with King Abdulaziz University	11	2,000,000
Saudi Film Festival Prizes	Cinema Association, in partnership with Ithra and with the support of the Film Commission	11	380,000
Production market prizes at the Saudi Film Festival	Cinema Association, in partnership with Ithra and the support of the Film Commission	2	150,000
Script Development Lab Prizes at the Saudi Film Festival	Cinema Association, in partnership with Ithra and the support of the Film Commission	4	100,000
Yusr Awards	Red Sea International Film Foundation	12	740,625
Film AIUla Awards	Red Sea International Film Foundation, in partnership with Film AIUla	2	Approximately 375,000
Kingdom Photography competition	Visual Arts Commission	3	121,500
Riyadh International Book Fair Prize	Literature, Publishing, and Translation Commission	6	300,000
Translation Hackathon	Literature, Publishing, and Translation Commission	3	200,000
Prize for the first edition of the Literary Partner Initiative	Literature, Publishing, and Translation Commission	1	100,000
Dia Aziz Prize for Portraiture, sixth edition	Saudi Arabian Society for Culture and Arts	3	100,000
Radwa Art Prize	Saudi Arabian Society for Culture and Arts, sponsored by the University of Business and Technology	10	50,000
Creative Piece competition	Architecture and Design Commission	3	100,000
Darb Al-Fenjal competition	Culinary Arts Commission	3	100,000

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(126) See the Creativity and Cultural Production Chapter for details.

(127) Amounts in SAR.



2

Chapter Two

Creativity and Cultural Production

- Cultural Production
- Creativity





Continuing the post-pandemic recovery trend observed in the 2021 Report on the State of Culture, this year has shown an increased growth in production indicators. This chapter monitors a prominent aspect of cultural production: institutional production, i.e., the production done or supported by cultural institutions, particularly governmental ones. This activity, along with increased support, has resulted from regulatory developments across cultural sectors, starting with the creation of cultural commissions in 2020 and the subsequent initiatives they launched to support and invigorate production.⁽¹⁾ The organization of festivals and seasonal events, which showcase cultural products, provide opportunities for investment partnerships, and serve as laboratories for production and development, is another noteworthy aspect. These two aspects, namely institutional support and festivals, are precisely linked to the marked growth in production this year. The key indicators demonstrating increased or diverse production in 2022 were literary publishing, translation, performance arts and theatrical shows, and art exhibitions. Thus, this chapter focuses on two dynamic stages of the culture cycle according to the UNESCO Culture Cycle Model (2009): creativity and production. This chapter focuses on creativity as a unique aspect of the work process and production as converting creative ideas into cultural products that can be disseminated, exhibited, and consumed. The first part of the chapter examines the levels of production and distribution across different cultural sectors, broken down by gender and province. The second part showcases award-winning works at the local and international levels as being an indicator of creativity.

Cultural Production

This chapter focuses on cultural products in their broader form, i.e., those distinguished from other commodities and services by artistic, aesthetic, symbolic, and spiritual values⁽²⁾ protected usually by copyright laws. It tracks the production levels, analyzes the most notable features and trends, and follows the significant developments in the state of production throughout the year across all cultural fields under four primary indicators:



Publishing and Translation⁽³⁾

Literary Publishing

This year, literary production activity by Saudi authors⁽⁴⁾ showed a promising recovery following a drop the year before, as indicated by researcher Khaled Al-Youssef's "Bibliography of Literary Publishing." In 2022, the literary books published numbered 701, the highest number ever recorded by the

Bibliography, marking a 17.82% increase from the previous year.⁽⁵⁾ This is the second-highest growth rate recorded, following 2016, as shown in Figure 2. In general, the average growth rate in literary publishing numbers in the Kingdom between 2015 and 2022 was 7.64%. The Bibliography also recorded a production increase in every literary genre except theatrical works, of which only six were released this year compared to eight the previous year. As shown in Figure 3, novels continued to top the list of genres with 208 novels, followed by poetry with 113 collections. In the 2019 report, more books were being published outside Saudi Arabia due to challenges in the local publishing market, such as high costs and poor distribution.⁽⁶⁾ However, the rate of foreign publishing has decreased in the past two years to less than 25% of all published literary books, as shown in Figure 5. This significant decrease suggests that local publishing has become more attractive to Saudi authors, thanks to the efforts of Saudi publishers and the support and training programs they have received, such as the Publishing Accelerator. Additionally, these publishers have been attending more events outside Saudi Arabia, which has helped them gain greater recognition and representation in the industry.

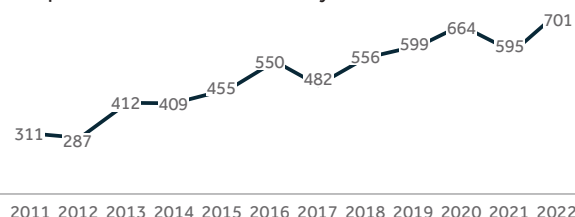


Figure 1: Literary Production and Publishing, 2011-2022⁽⁷⁾

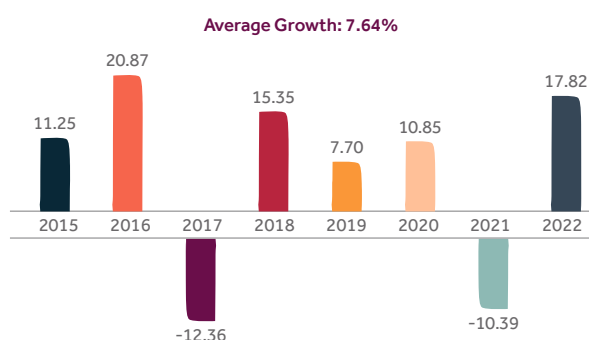


Figure 2: Literary Production Growth Rate and Average, 2015-2022⁽⁸⁾

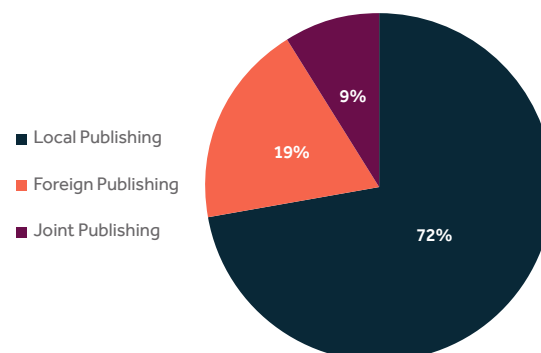


Figure 4: Distribution of Local and Foreign Literary Publishing, 2022⁽¹⁰⁾

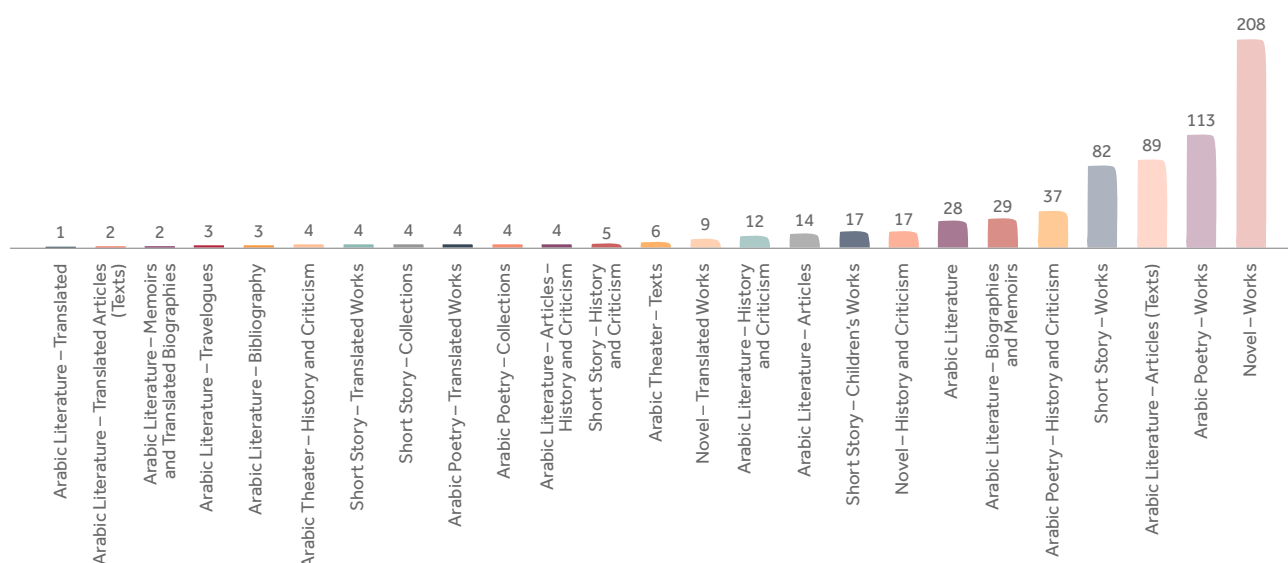


Figure 3: Literary Production and Publishing by Literary Genre, 2022⁽⁹⁾

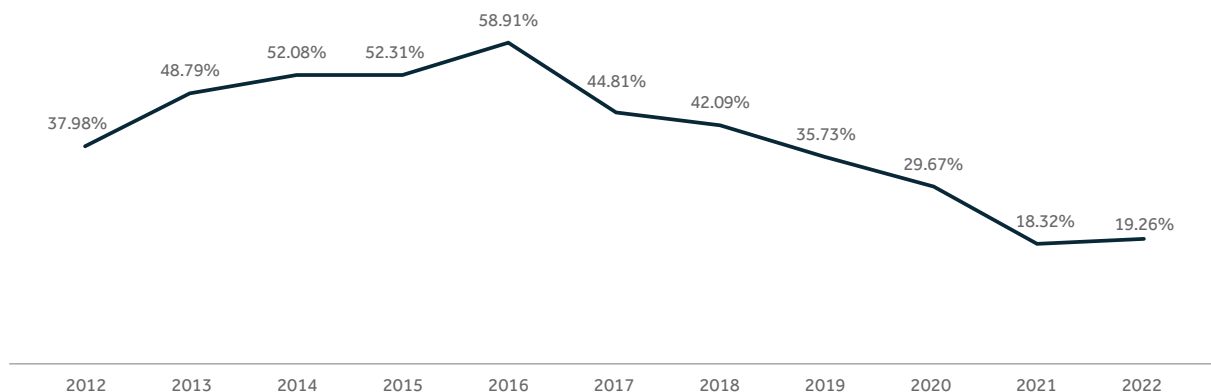


Figure 5: Foreign Publishing as Percentage of Total Literary Publishing by Saudi Authors over the Past Ten Years⁽¹¹⁾

According to the data, female literary authorship increased this year, narrowing the gender gap to nearly pre-2021 levels, the year when the most significant gender disparity over the last five years was reported (Figure 6). In 2022, female authors published 297 books, representing 42% of literary production. If we break it down by genre, novels written by

female novelists outnumbered those published by male novelists this year. However, there is still a significant gender disparity in poetry production, as observed in previous years (Figures 7 and 8).

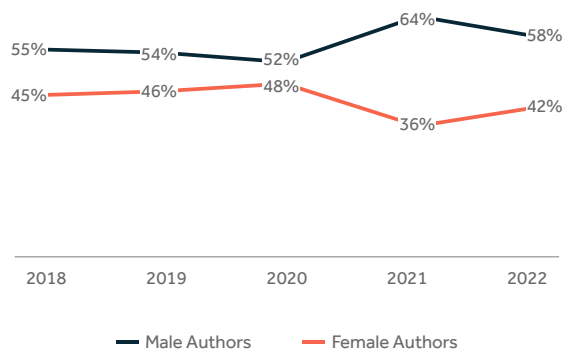


Figure 6: Literary Publication Percentage Distribution by Author's Gender, 2018-2022⁽¹²⁾

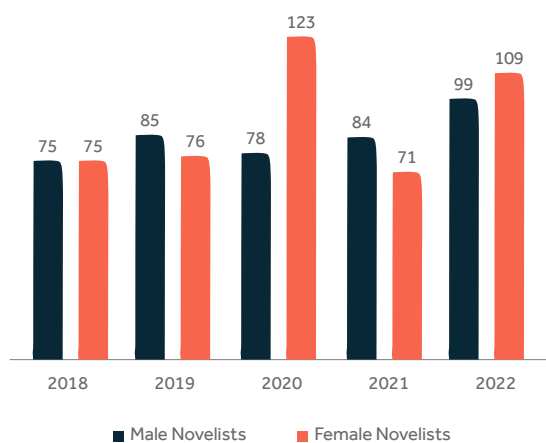


Figure 7: Novel Production by Novelist's Gender, 2018-2022⁽¹³⁾



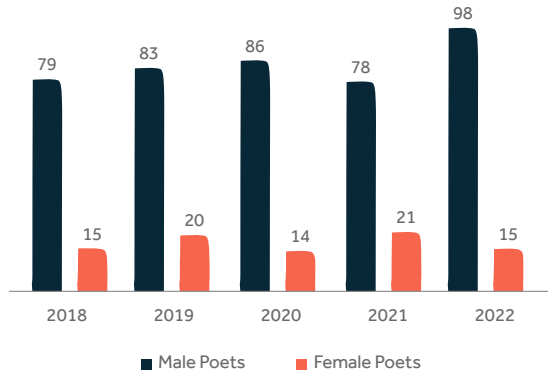


Figure 8: Poetry Production by Poet's Gender, 2018-2022⁽¹⁴⁾

Data indicate that the number of books published by literary clubs remains at a rate similar to last year's, with 150 books⁽¹⁵⁾ compared to 183 in 2021.⁽¹⁶⁾ Abha Literary Club published the majority of works, 26 books this year, followed by Taif Literary Club and Najran Literary Club, with both publishing 20 books. Notably, Riyadh Literary Club was one of the lowest publishing clubs this year, with only five published books after topping all other literary clubs for the last five years (Figure 9). The overall decrease in literary club production can be attributed to activity by commercial publishers, which attract more authors, as well as the regulatory transformations in the Saudi publishing sector.

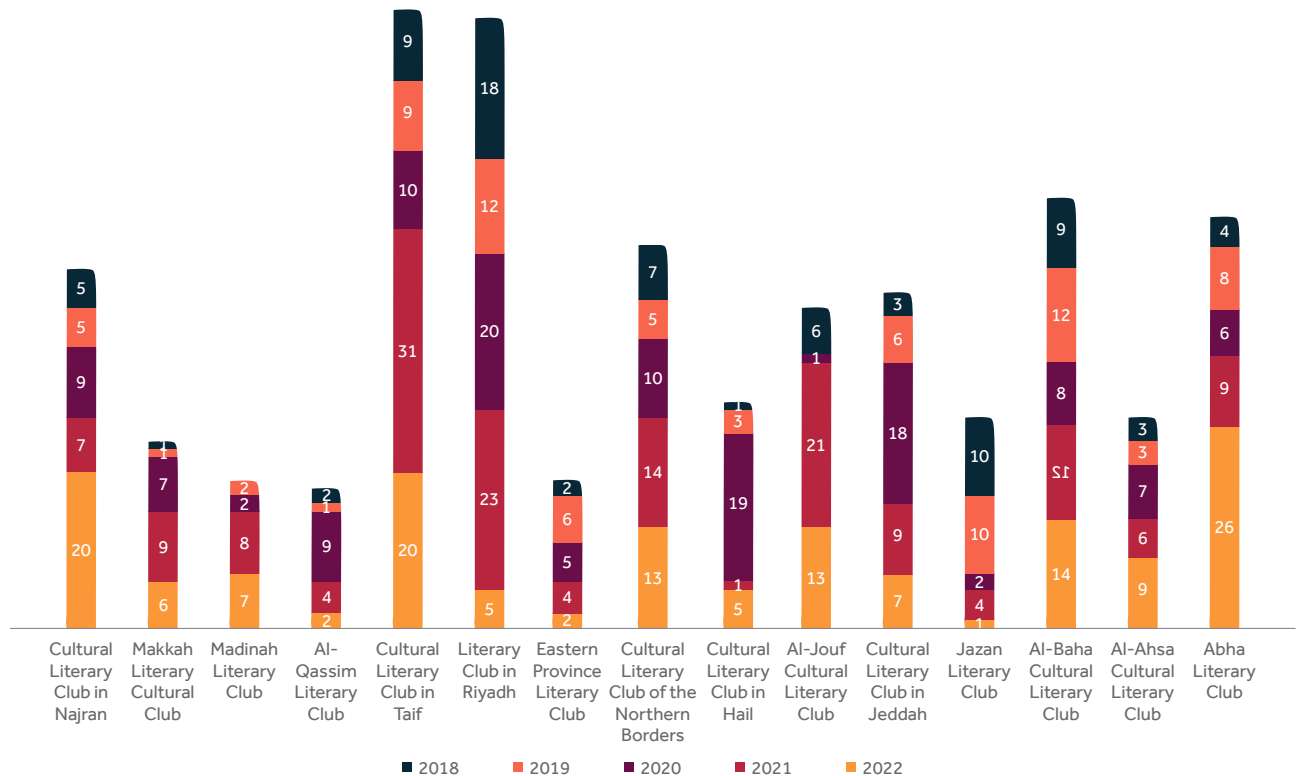


Figure 9: Literary Clubs Production by Branch, 2017-2022⁽¹⁷⁾

Digital Publishing

Digitization of Arabic books faces various challenges, which naturally apply to the digital book publishing landscape in Saudi Arabia, as the 2020 Report indicates. These include limited Arabic-supporting technologies, high costs, and readers turning to more accessible e-forms, like PDFs, which are susceptible to copyright and intellectual property violations, among other reasons contributing to publishing houses' reluctance to digitize their books.⁽¹⁸⁾ However, the digital transformation accelerated by the COVID-19 pandemic, in addition to institutional support for publishing houses, has demonstrated promising possibilities for growth in digital book publishing.⁽¹⁹⁾ For example, one of the support programs launched by the Literature, Publishing, and Translation Commission in late 2021 was the Digital Publishing Program, which included three tracks: Book Digitization, Children's Book Digitization, and Audiobooks.⁽²⁰⁾ The Book Digitization track aimed to convert books to ePub format, which satisfies the requirements of e-readers, and then deliver the e-books to the publishing houses registered in the Digital Publishing Program. As a result, 198 printed books were converted to e-books in 2022, totaling 39,506 pages, with an average of approximately 200 pages per book.⁽²¹⁾



Research Production and Academic Publishing in Cultural Fields

A survey of research published in peer-reviewed academic journals published in Saudi Arabia between 2020 and 2022 was conducted for this report. It included 940 research published in 27 peer-reviewed academic journals, categorized into 29 topics. It aimed to provide a statistical reading of indicators of research production in cultural fields by measuring keywords in research titles and abstracts and sorting them into main topics.⁽²²⁾ This year, 358 research were published in cultural fields, which is comparable to last year. This was less than the noticeable publication hike in 2021 compared to 2020 (Figure 10).

Female researchers comprised 30% of the total research published in cultural fields in 2022, comparable to female researchers' contribution in 2021 of 33%. However, this percentage varies by topic. For example, while female researchers published more research on children's literature, childhood, and cultural studies, comparative literature, comparative linguistics, theater studies, Saudi literature, and fashion and jewelry, researchers of both genders contributed equally to linguistic corpus, language computing, Arabic calligraphy, museums, and cultural tourism.

The survey also tracked international contributions to research production in Saudi Arabia, as represented by the number of research published by researchers from foreign universities and institutions. These contributions were most significant in journals published by research centers or cultural institutions; one out of three journal research from such centers and institutions had the names of researchers from outside Saudi Arabia. In contrast, international contributions to journals published by universities amounted to at most one out of every ten research papers. This disparity reflects the journals' differing levels of researcher diversity and global circulation.

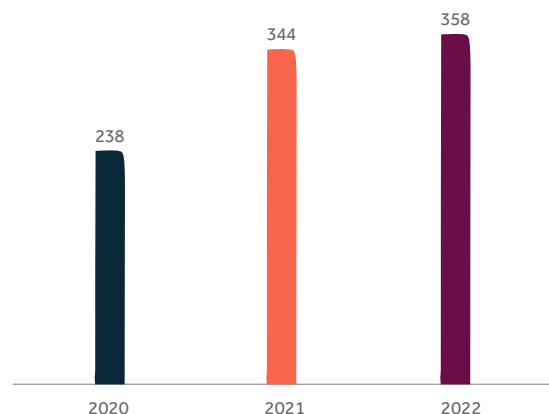


Figure 10: Number of Research in Cultural Fields Published in Peer-reviewed Academic Journals in Saudi Arabia, 2020-2022

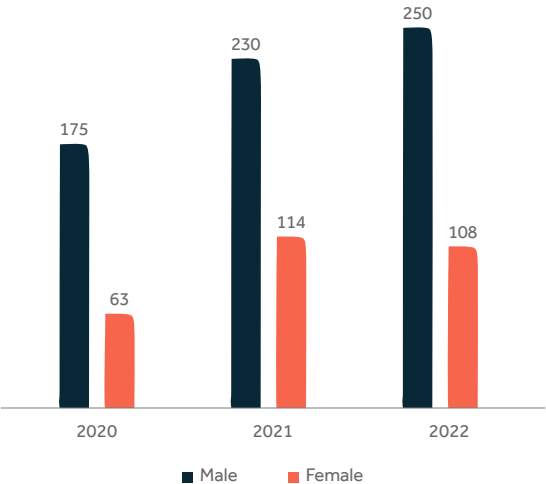


Figure 11: Distribution of Research in Cultural Field Published in Peer-reviewed Academic Journals in Saudi Arabia by Author's Gender, 2020-2022

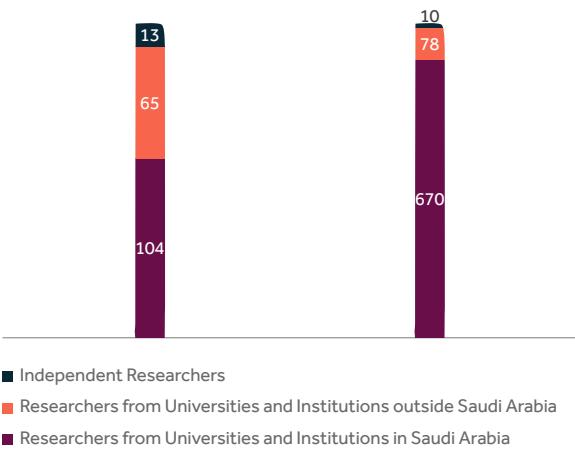


Figure 12: Distribution of Research in Cultural Fields Published in Peer-reviewed Academic Journals in Saudi Arabia by Publishing and Researcher Institution, 2020-2022

The survey revealed that most of the research published in academic journals in Saudi Arabia between 2020 and 2022 was related to topics of language and literature, with 85%. This finding is not surprising, as more peer-reviewed academic journals in Saudi Arabia specialize in language and literature compared to other fields. Figure 13 shows that Arabic calligraphy, folktales, and traditional arts, museums, and cultural tourism were the least studied fields over the past three years, followed by documents and manuscripts, theater, children's literature, culture and childhood, and fashion and jewelry. It is noteworthy that no studies on cinema, movies, and music were published in peer-reviewed academic journals in

Saudi Arabia during the past three years. This highlights the importance of encouraging relevant researchers and institutions to address these research gaps. Moreover, the COVID-19 pandemic has led to the emergence of new research topics, such as the impact of the pandemic on literature, teaching language, culture, and arts, interior design, architecture, and library and information services. In 2022, there has been an increase in the publication of research on this topic, i.e., the effect of the pandemic, compared to 2021. Published research in other fields, such as language teaching, library and information studies, folktales and traditional arts, digital culture, digital literature, and language computing, increased, as shown in Figure 14.

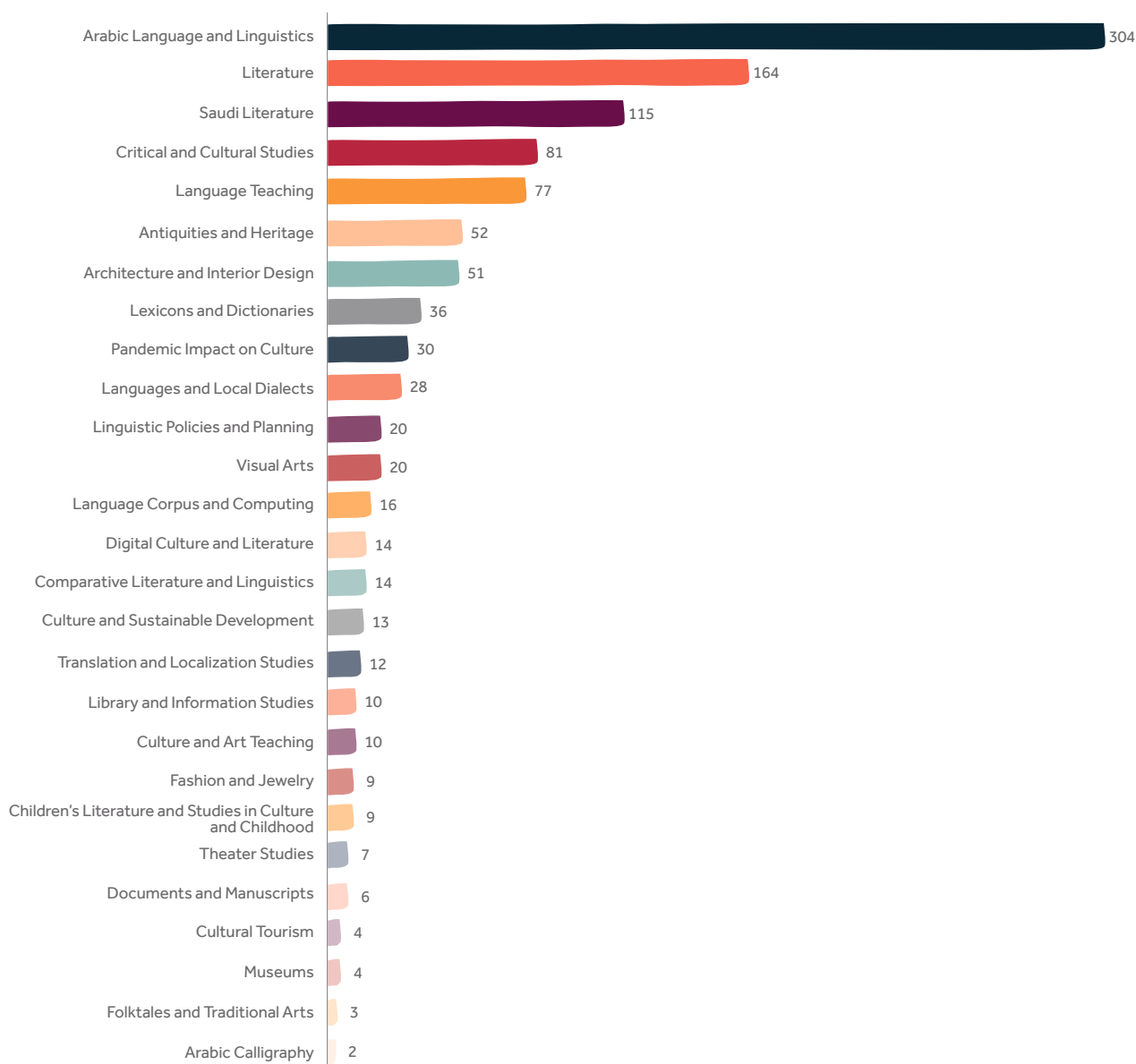


Figure 13: Number of Research Published in Peer-reviewed Academic Journals in Saudi Arabia by Topic, 2020-2022

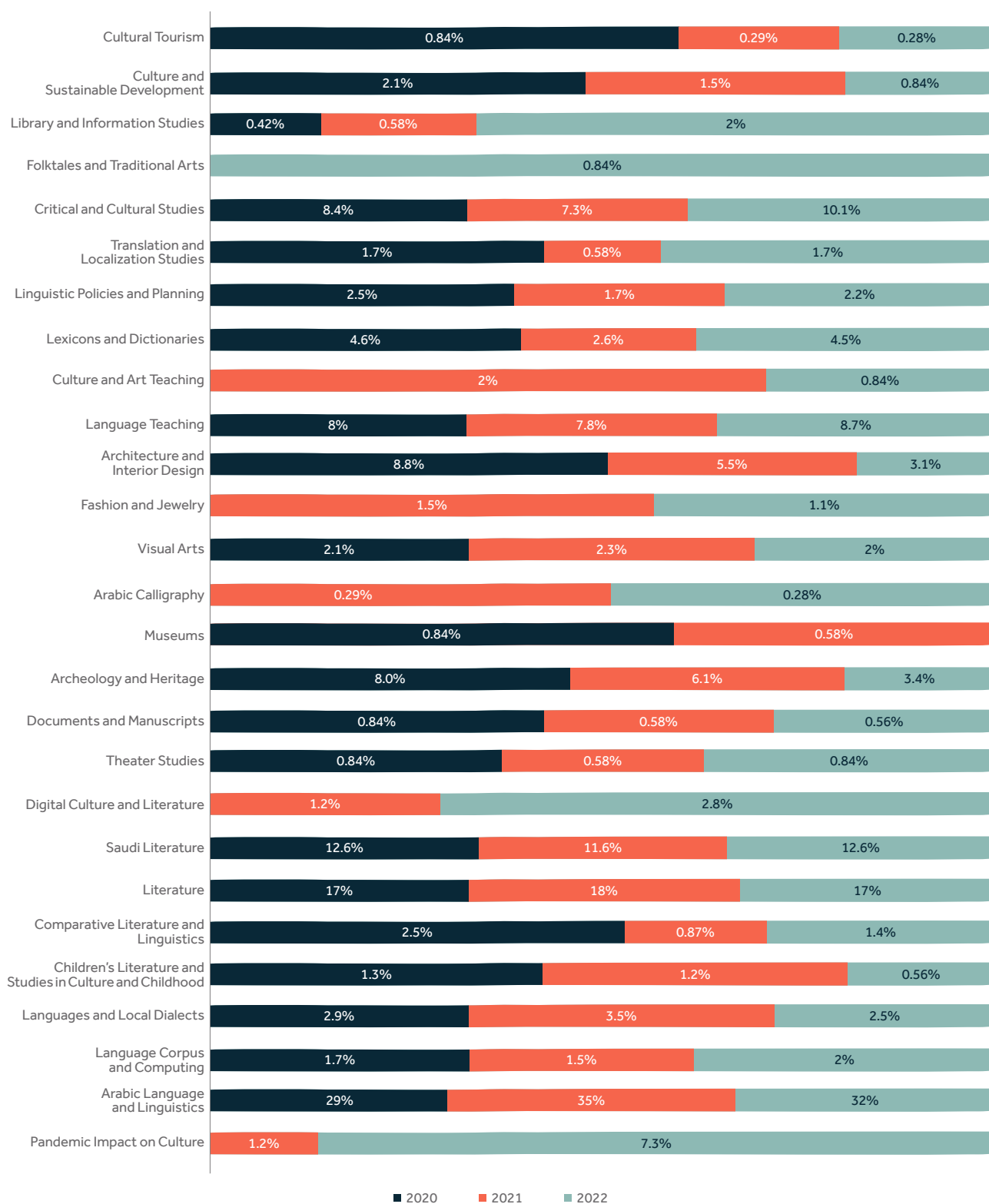


Figure 14: Relative Distribution of Research Published Annually by Topic, 2020-2022



Production in Translation

In 2021, the Literature, Publishing, and Translation Commission launched the Tarjim initiative to support Saudi publishing houses. The outcome represents one of the most prominent initiatives to support translation production in the past two years. In a promising trend, 524 works were translated as part of the initiative in 2022⁽²³⁾, compared to 336 works in 2021⁽²⁴⁾, translated from 12 different languages and into six languages, with English being the most translated language at 75.37%, followed by French at 10.26%.⁽²⁵⁾

More particularly, 341 books published by 26 publishing houses on 20 different topics were translated as part of the initiative. About 72% of the translators were male, and 28% female. Translated novels came in third place this year at approximately 15%, preceded by children's educational books and literature and philosophy at 25% and 23%, respectively. This distribution is notable compared to authorship figures in those two fields in past report editions.⁽²⁶⁾ Figure 17 shows trends in the topics of translated books chosen by publishing houses. For example, Athar, Kalimat, and Page 7 houses translated the highest number of novels, while Digital Future, Arwa Alarabeia, and Educators specialize in translating children's educational books and literature. Mana Platform specializes in translating philosophy and social sciences, while Yatakhayaloon focuses on fantasy and science fiction.



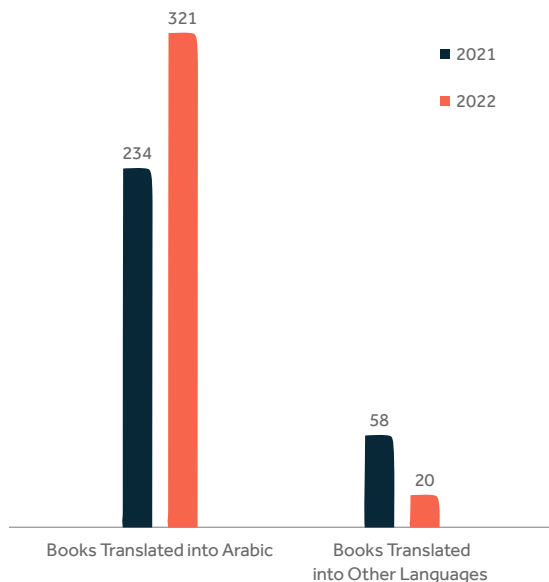


Figure 15: Books Translated as part of the Tarjim Initiative, 2021-2022⁽²⁷⁾

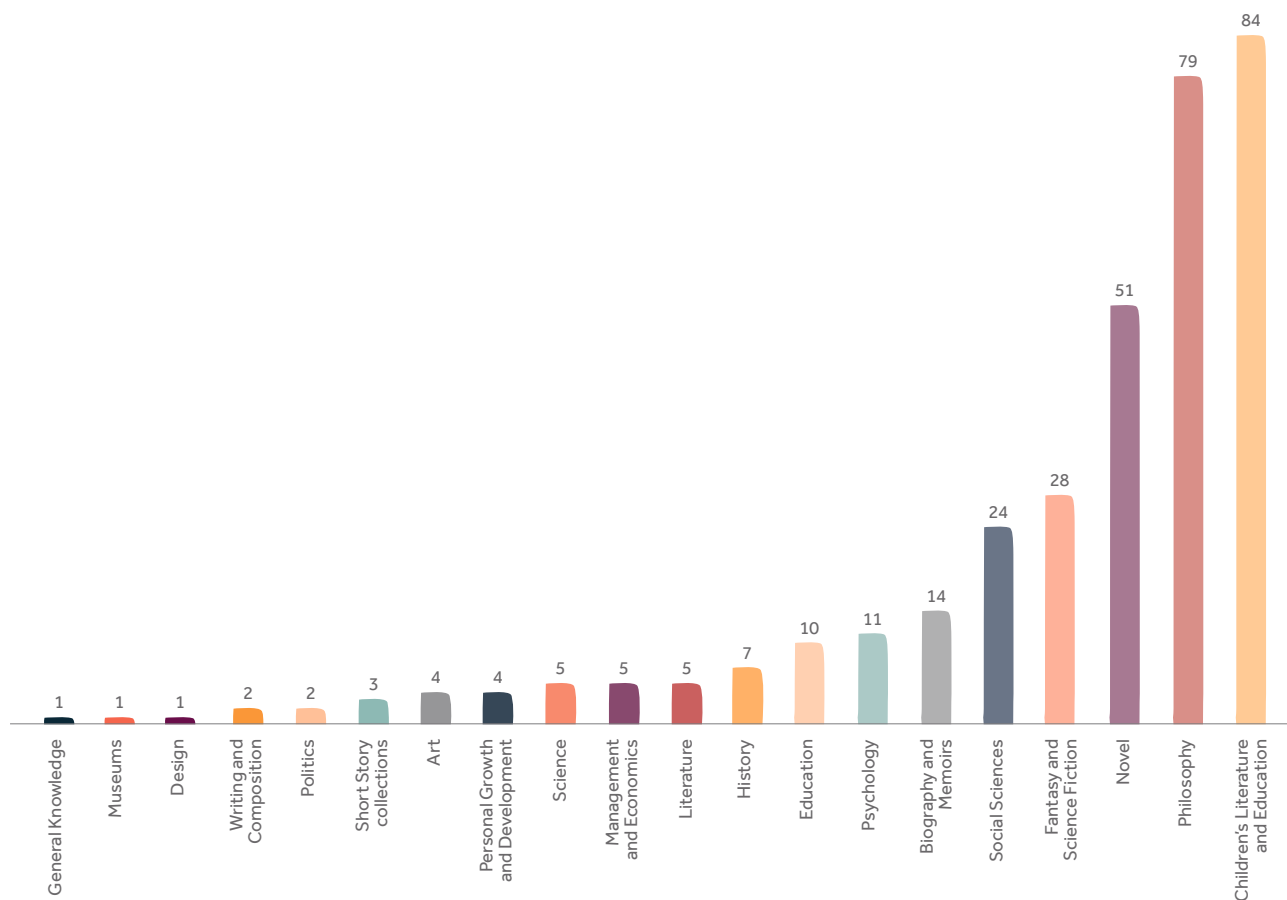


Figure 16: Topics of Translated Books into Arabic as part of the Tarjim Initiative, 2022⁽²⁸⁾



Figure 17: Number of Books Translated as part of the Tarjim Initiative by Publishing House and Topic, 2022 ⁽²⁹⁾





This year, the Tarjim initiative helped translate 33 academic periodicals and 150 articles⁽⁵⁰⁾, compared to 44 periodicals in 2021.⁽⁵¹⁾ While topics of translated journals varied from philosophy, cinema, manuscripts, and theater to games

and comic books (Table 1), most translated articles were on philosophy, social sciences, and psychology. Of these, 50 articles were translated by the Mana Platform and 100 by the Philosophy Society.⁽⁵²⁾

Table 1: List of Journals Translated as part of the Tarjim Initiative, 2022⁽⁵³⁾

Journal	Language
Bibliographical Data of King Abdulaziz University Manuscripts	Translated from Arabic
Bibliographical Data of Shared Manuscripts from King Faisal Center for Research and Islamic Studies	
Bibliographical Data of Princess Nourah bint Abdulrahman University Manuscripts	
Final Approved List of Bibliographical Data of Imam Muhammad bin Saud Islamic University Manuscripts	
Manuscript Database — Islamic University of Madinah	
Manuscript Database — Jeddah University	
Final Bibliographical Data — Taibah University Manuscripts	
Kurrasat Cinema Magazine, 2 nd Issue	

Journal	Language
Short Films Studies	Translated into Arabic
Comic Book Studies	
Fashion and Performance Studies	
Journal of Screenwriting	
Applied Theater Studies	
Book 2.0	
Drama Therapy	
Writing in Creative Practice	
Short Stories: Theory and Application	
Games and Virtual Worlds	
Virtual Creativity	
Experimental Art Studies	
Journal of the International Federation of Library Associations and Institutions	
The New Philosopher	
Philosophy Now	



Audio and Visual Production

Films

In this year’s report, the chapter showcases data on Saudi films produced in 2022,⁽³⁴⁾ unlike figures on film classification and categorization tracked in previous editions, which do not reflect the actual state of production but rather provide a general and partial view of the sector’s growth. According to available data, 72 Saudi films were produced in 2022, of which feature-length films constituted approximately 14% (Figure 18). This proportion is unsurprising given the nascency of the Saudi cinema and film sector, as the production stages of feature-length films are costly and require infrastructure. Notably, nearly half of these feature-length films were dramas, followed by the rest, which are nearly distributed evenly (Table 2). The data also indicate no female producers of feature-length films this year.

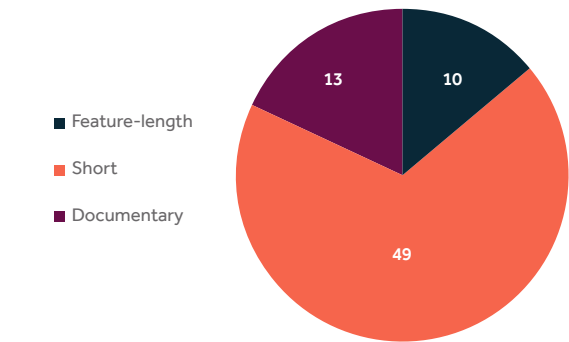


Figure 18: Number of Saudi Films Produced by Genre, 2022⁽³⁵⁾



Table 2: List of Saudi Feature-length Films Produced in 2022⁽³⁶⁾

Film	Producer	Film Category
90 Days	Khalid Al-Harbi	Drama
The Matchmaker	Abdulmohsen Al-Dhabaan	Drama and Thriller
AlKhallat+	Fahad Al-Ammari	Comedy and Thriller
Raven Song	Mohamed Al-Salman	Drama
A Woman's Life	Sameer Arif	Drama
Sattar	Abdullah Al-Arak	Comedy and Action
Route 10	Omar Naim	Action
Valley Road	Khalid Fahad	Family and Drama
Slave	Mansour Assad	Comedy and Sci-Fi
Noura	Tawfiq Al-Zayidi	Drama

Film Festivals and Production Projects

Film festivals in Saudi Arabia have an essential role in supporting production. First, they create a platform for filmmakers to compete and access better opportunities through the production companies and support and talent programs. They also help present Saudi cinematic productions to the audience, locally and globally. The most prominent of these are the Saudi Film Festival, held for the first time in 2008, and the Red Sea International Film Festival. The 2022 Saudi Film Festival had 214 submitted films for participation, among which six feature-length Saudi films, 15 documentaries, and 57 short films were screened.⁽³⁷⁾ This was a promising increase compared to the year before when 89 films were submitted for participation.⁽³⁸⁾ At the Red Sea International Film Festival, seven feature-length films and 18 short films were screened out of 132 Saudi films submitted for participation. These figures are close to last year's figures.⁽³⁹⁾ The feature-length films screened at the festival were Raven Song, Within Sand, AlKhallat+, Sattar, Valley Road, Slave, and How I Got There, a joint Saudi-Kuwaiti production. These festivals include production and development labs, such as



the Screenplay Development Lab at the Saudi Film Festival, where three Saudi films won awards in the Feature-Length Screenplay track, and a fourth film won the Ghazi Al-Gosaibi Award for best screenplay based on a Saudi novel.



Figure 19: Nominated Feature-length Saudi Films at the Saudi Film Festival and the Red Sea International Film Festival, 2022⁽⁴⁰⁾

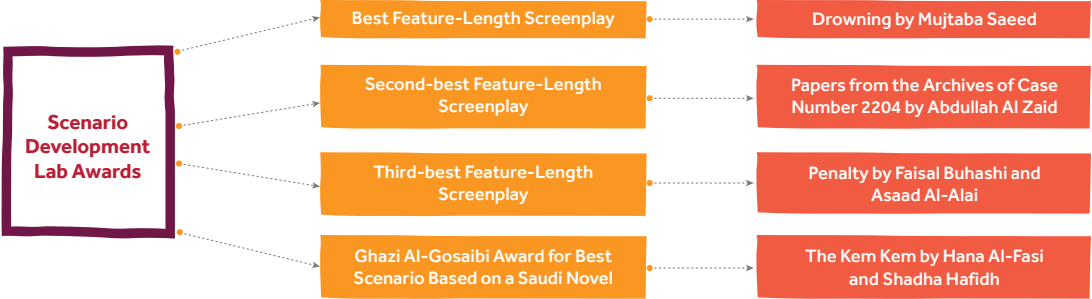


Figure 20: Award-winning Films at Saudi Film Festival Screenplay Development Lab, 2022⁽⁴¹⁾

Music

Due to the lack of centralized data on commercial music production statistics, we may look at the figures of Rotana, a major music production company in the sector, to get an overview of commercial music production.⁽⁴²⁾ These data indicate a significant increase in albums and singles produced by Saudi artists in 2022 (Figures 21 and 22).⁽⁴³⁾ This year, the company released eight albums, compared to only four last year, and 42 singles, compared to 31 in 2021. The Music Commission contributed to the production of six singles by

Saudi artists, a figure close to last year's (Figure 23). However, music production by females remains limited; looking at data by Rotana, no albums were released by Saudi female artists in the past two years. Even though over 33% of Saudi artists performing at concerts in 2022 were women,⁽⁴⁴⁾ only 12.5% of the total singles produced this year were by Saudi female artists. This gender disparity was also seen in the National Orchestra members. Only 16.4% of the members were females, mostly the chorus (22 of 26 female members) out of 158.⁽⁴⁵⁾



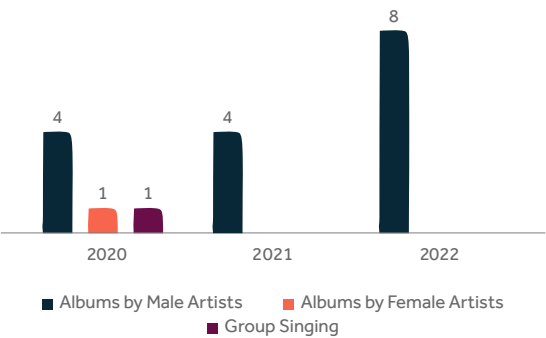


Figure 21: Albums by Saudi Artists, 2020-2022⁽⁴⁶⁾

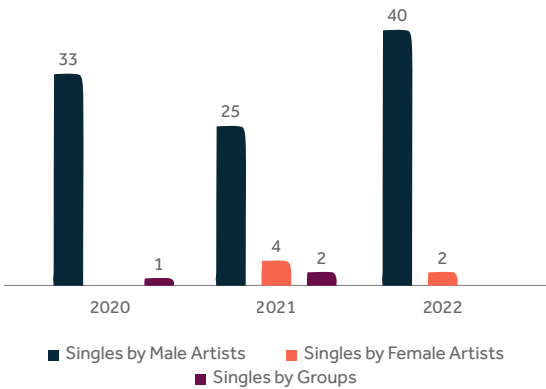


Figure 22: Singles by Saudi Artists, 2020-2022⁽⁴⁷⁾



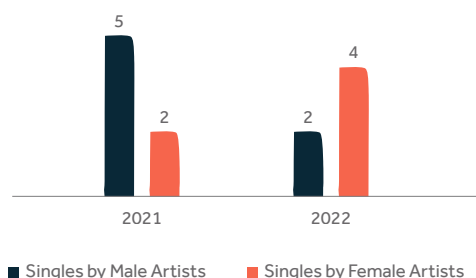


Figure 23: Singles Produced by the Music Commission⁽⁴⁸⁾

Podcasts

The report examined 20 podcasts⁽⁴⁹⁾ with content focusing on various areas of culture. These podcasts produced 311 episodes in 2022, and sample data show culture as the most common topic of these episodes, followed by music, film, publishing, and books, with three podcast programs each. Only two podcasts were dedicated to each of language and literature. Finally, the report identified only one podcast focusing on theater and performing arts. These programs differed in presentation style between conversations and interviews, like the Podcast 1949, Musiqana, and Kham, to audio blog, like Tashakeel, and documentary content, like Al-Fasha.

Table 3: Cultural Podcast Episodes Produced, 2022⁽⁵⁰⁾

Podcast	Field	Number of Episodes
Alsun	Language	33
Lamhat	Books and Film	28
1949 ⁽⁵¹⁾	Culture	22
Musiqana ⁽⁵²⁾	Music	23
Jawalan	Literature	20
Kham	Film	18
Al-Nadi	Music	13
Al-Fasha	Heritage	13
Lasin	Language	11
Tashakeel	Theater and Performing Arts	10
Lawha	Publishing and Books	10
Qafilah – by Qafilah Magazine	Culture	7
The Café	Culture	7
Aql Ghayr Hadi'	Culture	6
Musicology - by PaperSamwich	Music	4
Asmaar	Literature	4
Kotobiology	Publishing and Books	3
Cinema Chat - by PaperSamwich	Film	2
Hiwarat Al Marifa ⁽⁵³⁾	General	35
Finjan ⁽⁵⁴⁾	General	42

Theater and Performing Arts Production

The theater and performing arts industry has experienced promising growth in the quality and diversity of production. Several significant factors have contributed to redefining the theater and performing arts landscape. Firstly, the sector has received ample support and regulation, including providing licenses for practitioners on the Abde'a Platform and initiatives aimed at promoting theater production. Secondly, the non-profit sector has undergone regulatory improvements following the Ministry of Culture's release of the sector's development strategy in 2021.⁽⁵⁵⁾ These changes have increased theater associations and amateur theater clubs. Finally, the role played by festivals and entertainment events, in which various entities participate, has also contributed to the sector's growth and success.

Theatrical Performances

According to available data, there were 150 theatrical performances⁽⁵⁶⁾ this year, compared to 46 last year. This increase is partly attributable to the exclusion of imported theatrical performances from the 2021 data.⁽⁵⁷⁾ This report also recorded 36 children's theater performances, half of which were held by the General Entertainment Authority (Figure 24). The Saudi Arabian Society for Culture and Arts (SASCA) and the General Entertainment Authority were the top organizers of most theater performances, followed by the Theater and Performing Arts Commission (Table 4). Notably, theater activities offered by the SASCA recovered after a downturn over the past two years, as indicated in the 2021 report. The SASCA branches held 71 performances this year, five of which were in the children's theater, compared to 30 performances in 2021.⁽⁵⁸⁾ This recovery may be attributed to the SASCA's active participation in festivals like the Riyadh Season, AlSharqiya Gets Creative, and partnerships with other entities.



Table 4: Theater Performances by Entity, 2022⁽⁵⁹⁾

Entity	Number of Theater Performances
General Entertainment Authority ⁽⁶⁰⁾	59
Theater and Performing Arts Commission	7
Theater and Performing Arts Commission and Literature, Publishing, and Translation Commission	1
Theater Groups - Support from Theater and Performing Arts Commission	3
Theater Groups	1
SASCA ⁽⁶¹⁾	66
Heritage Commission	3
Sixth Gulf Theater Festival for Persons with Disabilities	6
Universities	3
Private Sector Institutions	1
Total	150



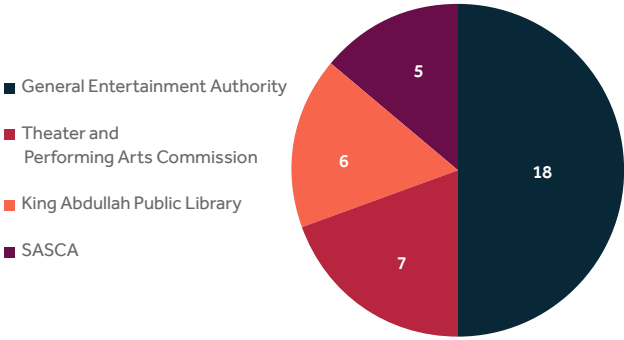


Figure 24: Children's Theater Performances, 2022⁽⁶²⁾

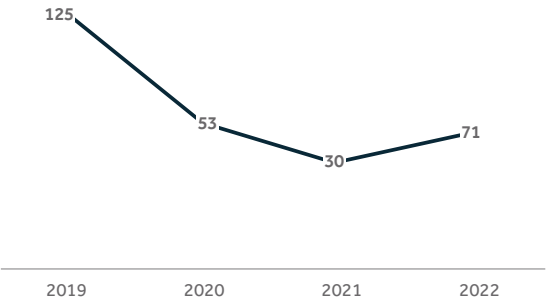


Figure 25: Theater Performances by SASCA, 2019-2022.⁽⁶³⁾



Performances

The effect of regulatory development in the sector was reflected in the diversity of professional performances.⁽⁶⁴⁾ Available statistics for this year indicate that 241 performances were presented by eight different entities, as shown in Figure 27. Figure 26 shows that traditional arts accounted for the most significant number of performances this year, followed by stand-up comedy and dance performances, compared to theater performances by local groups. Many performances offered this year were by international and Arab groups, particularly in the juggling, circus, and dance categories. Groups registered with the SASCA participate in traditional performing arts — which usually manifest as spontaneous social activities at celebrations and holidays.

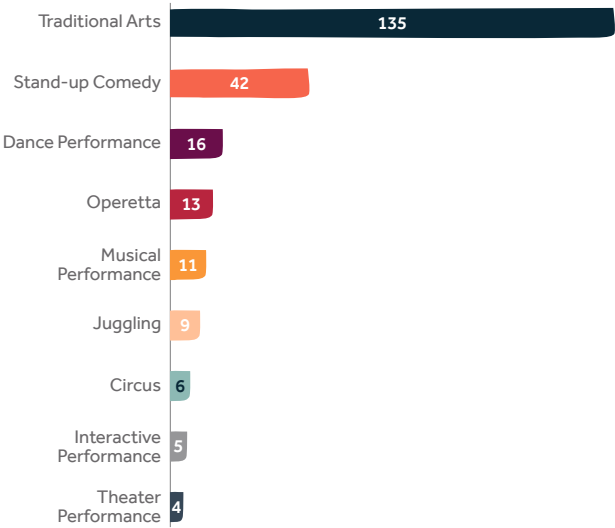


Figure 26: Performances by Category, 2022 ⁽⁶⁵⁾

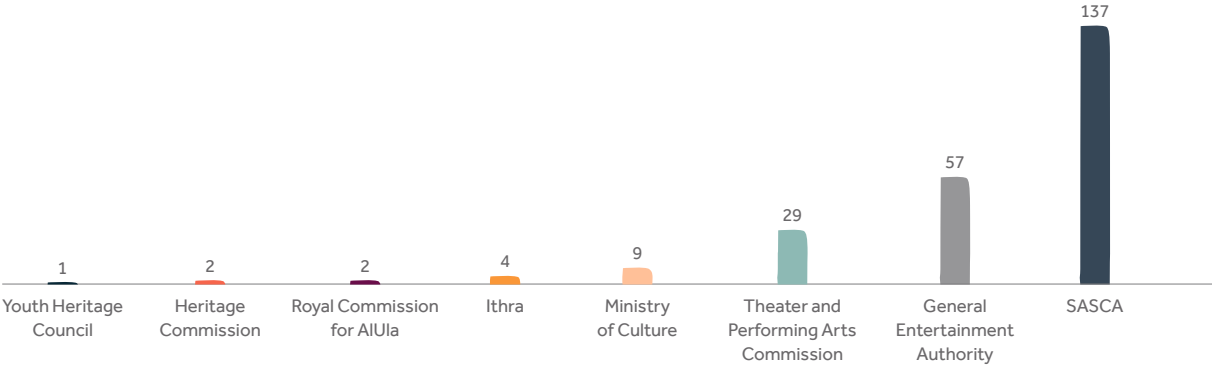


Figure 27: Performances by Organizing Entity, 2022 ⁽⁶⁶⁾

Production in Arts, Design, and Handicrafts (Handmade Traditional Industries)

Art Exhibitions

This chapter defines an art exhibition as a set of artworks exhibited for a short period in an art gallery, a commercial gallery, an open space, or any other exhibition space, whether by one artist or a group of artists.⁽⁶⁷⁾ Using the definition above, this report measures the visual arts production rate using two leading indicators: the number of exhibitions held during the year and the number of participating artworks in these exhibitions. According to available data, a total of 485 art exhibitions were held, as shown in Figure 28, and the report stated that 4,940 artworks were included in some of these exhibitions.⁽⁶⁸⁾ Data showed varying artistic trends as per the gallery or exhibition space type. Commercial art galleries and university exhibitions focus on visual or mixed arts. In contrast, conceptual and installation art and modern digital arts emerged as promising trends at non-commercial art institutions in Saudi Arabia and in the public, non-governmental, and non-profit sectors.

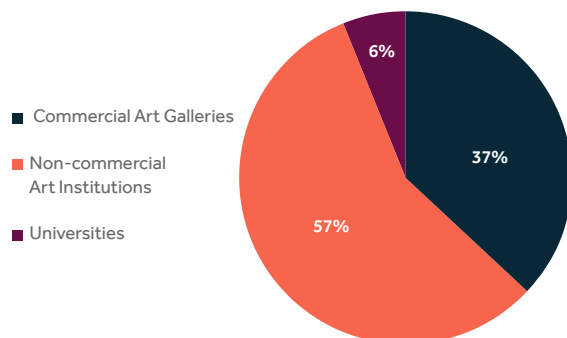


Figure 28: Art Exhibitions by Type of Entity, 2022

Commercial Art Galleries

There was a significant increase in exhibitions held at commercial art galleries in 2022, a continuation of the trend observed in the 2021 report, which pointed out the recovery of art exhibition activity from the effects of the pandemic.⁽⁶⁹⁾ This sustained growth in production indicators can be attributed to the support and institutional regulation factors reflected in all cultural sectors. In 2022, 181 art exhibitions were held at 22 commercial art galleries surveyed, compared to 121 exhibitions in 2021.⁽⁷⁰⁾ Figure 29 shows that 2,296 artists participated in exhibitions this year, averaging 12 artists per exhibition.

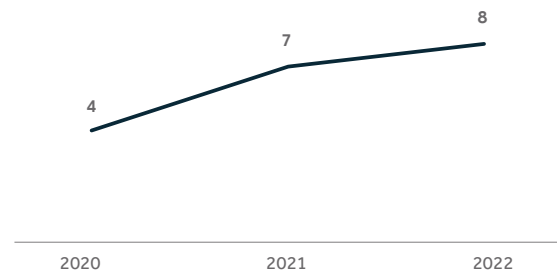


Figure 29: Average Number of Exhibitions per Gallery, 2020-2022⁽⁷¹⁾



Non-Commercial Art Institutions

Growth in artistic production was also prominent among non-commercial institutions in Saudi Arabia, which include public, non-governmental, and non-profit organizations. Figure 28

shows that 278 art exhibitions were held at these institutions this year. These exhibitions comprised 57% of all art exhibitions held in Saudi Arabia this year, exceeding the global average of 15%.⁽⁷²⁾ This percentage was almost similar to last year at 56%.⁽⁷³⁾

Table 5: Art Exhibitions by Some Art Institutions in Saudi Arabia, 2022

Entity	Number of Exhibitions	Number of Participating Artists
Visual Arts Commission ⁽⁷⁴⁾	5	86
Misk Art Institute ⁽⁷⁵⁾	10	147
Diriyah Biennale Foundation ⁽⁷⁶⁾	1	64
Madinah Arts Center ⁽⁷⁷⁾	38	182
Art Jameel ⁽⁷⁸⁾	7	—
Ithra ⁽⁷⁹⁾	3	53
Riyadh Art (Noor Riyadh) ⁽⁸⁰⁾	1 in 40 locations	130
SASCA branches ⁽⁸¹⁾	209	—



Table 6: List of Art Exhibitions Organized by the Visual Arts Commission and Type of Participating Artwork, 2022⁽⁸²⁾

Exhibition Name	Number of Male Artists	Number of Female Artists	Number of Works	Type of Work
Mural Art Festival "Shift22"	24	8	27	Mural Art
			103	Installation
			9	Sculpture
			1	Video Art
Intermix Residency Art and Fashion Reimagined	7	19	26	Visual Artwork and Fashion Design
Find Me Through the Fog (Riyadh - Abha)	14	4	6	Installation
			1	Print on Multimedia
			2	Video Art
			1	Acrylic on Canvas
Digital Arts (NFT) Forum	8	2	10	Digital Artwork



In addition to the Shift22 Mural Art Festival, which showcased 140 artworks by 32 artists from Saudi Arabia, this year, several diverse exhibitions were held, including Noor Riyadh, organized by Riyadh Art, and the Contemporary Art Biennale, organized by the Diriyah Biennale Foundation. The second annual exhibition of Noor Riyadh presented 190 works in different forms, sharing the concept of light (noor) as a topic or artistic style in 40 locations, all in open spaces in Riyadh City. This markedly increased from last year, when approximately 60 works participated in the exhibition, spread out across only 13 locations.⁽⁸³⁾ Participation by Saudi artists in Noor Riyadh also rose from 19 artworks in 2021 to 33 in 2022. These works ranged from installation and conceptual pieces to sculpture and video art.⁽⁸⁴⁾ The Contemporary Art Biennale, launched in late 2021 and ran through March 2022, included 64 artists and 220 artworks, 34 of which were by 27 Saudi artists.⁽⁸⁵⁾ The Biennale included six sections: Crossing the River, Experimental Preservation, Peripheral Thinking, Going Public, Brave New Worlds, and Concerning the Spiritual.⁽⁸⁶⁾

Architecture and Design

This year, four exhibitions were held for the King Salman





Charter for Architecture and Urbanism in Dhahran, Abha, Jeddah, and Madinah,⁽⁸⁷⁾ following the launch of the first Charter exhibition in Riyadh City in 2021.⁽⁸⁸⁾ The Salmani architectural style, inspired by Saudi architectural identity and cultural and environmental heritage, is one of the most significant features of creative production in architecture and design. Last year, the report detailed the Charter's initiative and its core values: authenticity, continuity, human centricity, livability, innovation, and sustainability.⁽⁸⁹⁾ This year, the Sports Boulevard Foundation announced it was launching the Urban Design Code for areas near Prince Muhammad bin Salman bin Abdulaziz Road, the first urban design code⁽⁹⁰⁾

based on the principles of Salmani Architecture.⁽⁹¹⁾

Along with the King Salman Charter for Architecture Exhibition, organized by the Architecture and Design Commission, and the Saudi Design Festival, supported by the Commission, the report observed 26 design and architecture exhibitions held at Saudi universities, bringing the total number for this year to 31. Princess Nourah bint Abdulrahman University came first as regards the number of exhibitions held by universities, with 11 exhibitions. As shown in Figure 30, exhibitions on architectural heritage, product design, and interior design topped the list compared to digital and graphic design.

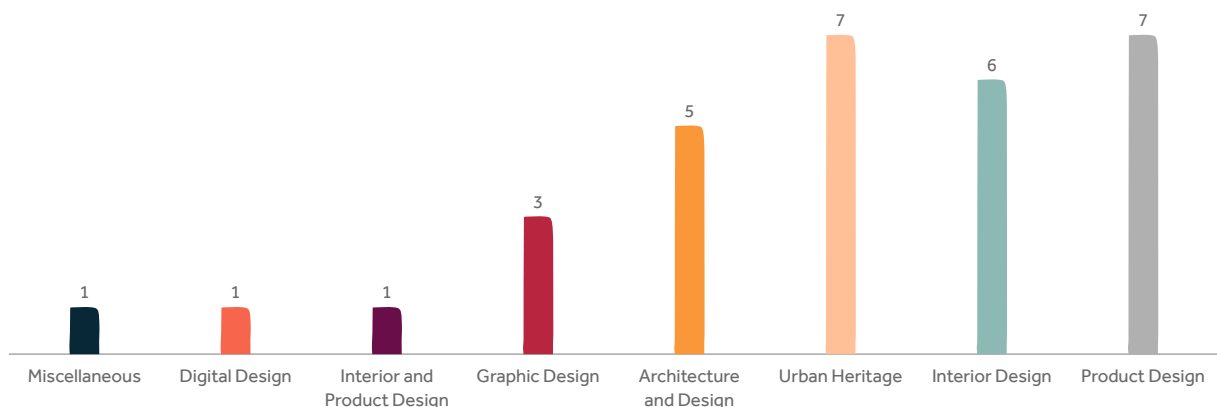


Figure 30: Architecture and Design Exhibitions by Category, 2022⁽⁹²⁾

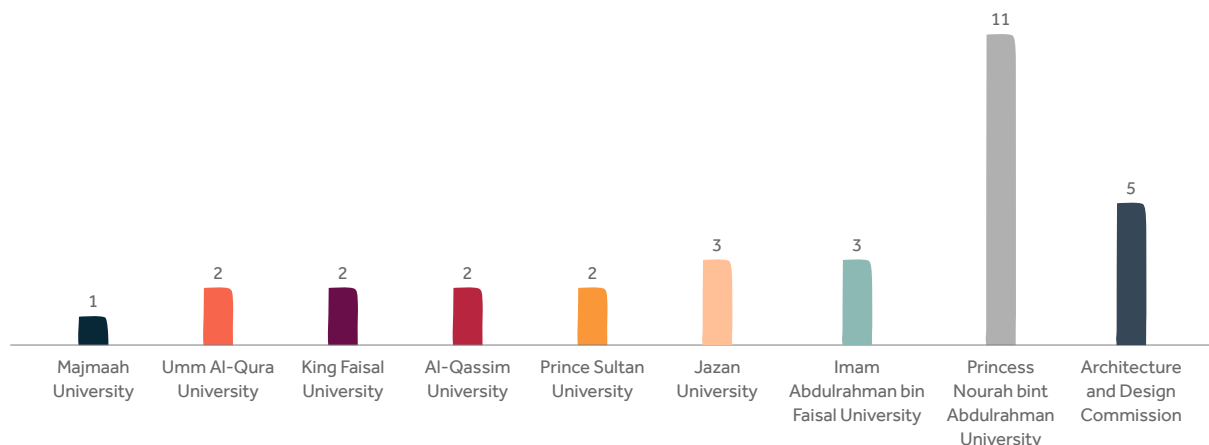


Figure 31: Architecture and Design Exhibitions by Organizing Entity, 2022⁽⁹³⁾

Fashion

Designs inspired by components of Saudi heritage remain one of the main trends in design and production in the fashion sector, as indicated in past editions of this report.⁽⁹⁴⁾ For example, the Fashion Commission released a fashion guide for Founding Day titled “Dressed from the Day We Began” and the second edition of its dress code for the Saudi Cup 2022, which contains guidelines for looks that reflect traditional Saudi attire. The guide suggests some examples of traditional clothing for men: the bisht, the sudairiah, the daglah, and the sayah. The dress code specifies some traditional colors and designs for sleeves and head coverings for women. This trend toward traditional inspiration was reflected at the fashion shows held in 2022. The report mentions six shows by schools of design and arts at Saudi universities, three of which presented traditional Saudi fashion (Figure 7). As for fashion shows organized by the

General Entertainment Authority this year, ten in total, they focused on contemporary and global designs, as was the case at the Ana Arabia Exhibition and the second and third editions of the international Jimmy Fashion Show.⁽⁹⁵⁾

This year, the second edition of 100 Saudi Brands was also launched⁽⁹⁶⁾ to support fashion brands and develop the production and manufacturing of Saudi clothing. This year’s edition included new categories: fragrances and shoes, as well as the existing categories of ready-made clothes, modest clothing (clothing designed to be modest and less revealing, e.g. long sleeve tops or loose clothing), wedding outfits, handbags, jewelry, and demi-couture (fashion manufactured using principles of high fashion: haute-couture, but sold as ready-made clothing), and premium. This year, designers from the 100 Saudi Brands Program participated in one local and two international shows, compared to one local show in 2021.⁽⁹⁷⁾





Table 7: Selected Major Fashion Shows and Number of Participating Designers, 2022

Show	Type	Organizing/Supporting Entity	Number of Designers
100 Saudi Brands Show, New York	International	Fashion Commission	300 ⁽⁹⁸⁾
100 Saudi Brands designers' participation in the Milan Trade Fair	International		
100 Saudi Brands designers' participation in the King Abdullah Financial District Show	Local		
Open Studio (Intermix Gathering: Art and Fashion Reimagined)	Local	Visual Arts Commission and Fashion Commission	26 ⁽⁹⁹⁾
Saudi Fashion Show	Local	Ithra ⁽¹⁰⁰⁾	-
Inikas Show	Local	Princess Nourah bint Abdulrahman University	187 female ⁽¹⁰¹⁾
Fashion Show	Local	Al-Qassim University	88 female
Fashion Show	Local		78 female ⁽¹⁰²⁾
Asala Show	Local	King Faisal University	30 male and 45 female ⁽¹⁰³⁾
Our Culture, Our Identity Show (Founding Day)	Local		
Heritage of the Kingdom Show	Local	Jazan University	10 female ⁽¹⁰⁴⁾



Handicrafts (Handmade Traditional Industries)

This year, the handicraft sector (handmade traditional handicrafts) witnessed regulatory developments, such as the development of the National Artisans’ Registry and the conversion of the Creative Handicraft Centers of the Saudi National Handicrafts Program (Bari) into Artisans’ Houses under the auspices of the Heritage Commission. The centers train artisans and exhibit and market their products. Additionally, new licenses were issued through the Abde’a Platform, which issued 636 licenses in 2022. Given the link between these handicraft products (cultural handicrafts) and community practices and their participation in local festivals and markets, it is not easy to list and register these products, except those produced as part of institutional or sponsored projects. For example, 1,300 pieces were completed this year, compared to 330 pieces in 2021, as part of the collaboration between the Heritage Commission and hotels to support the distribution of these products in Saudi Arabia (Figure 32).⁽¹⁰⁵⁾

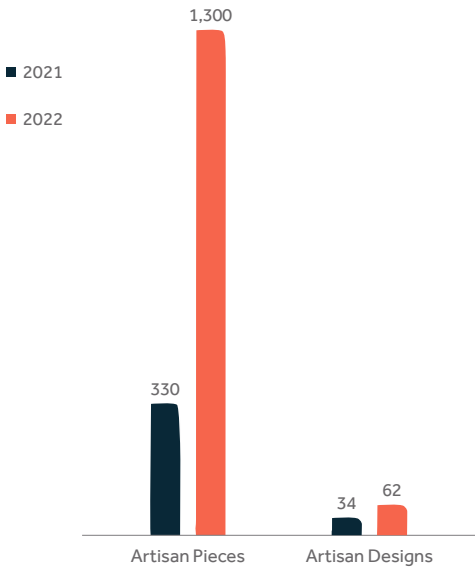


Figure 32: Designs and Pieces Produced, 2021-2022⁽¹⁰⁶⁾

Notably, 73.6% of all licensed artisans in 2022 were women,⁽¹⁰⁷⁾ aligning with women’s leadership in handicraft (cultural handicrafts) sectors in various countries.⁽¹⁰⁸⁾ In particular, the statistics show that female artisans predominate the different handicraft fields, even for handicrafts traditionally associated with men, such as weaving and embroidering bishts and prayer beads.⁽¹⁰⁹⁾ Figure 33 shows that the only handicraft that male artisans predominated this year was woodworking, with 51 male vis-à-vis 39 female artisans. On a provincial level, the Eastern Province had the highest number of licensed artisans this year, followed by Riyadh and Makkah, with 100, 98, and 90 artisans, respectively (Figure 34). Given the connection between traditional handicrafts, provincial heritage, and local natural resources, some fields vary by province. For example, more than half (64%) of licensed artisans in the textile field were in northern provinces. In contrast, the highest proportion of artisans working in fields related to palm products was in Jazan, at 28%. On the other hand, this provincial diversity was not reflected in leatherworking, embroidery, or metalworking fields.

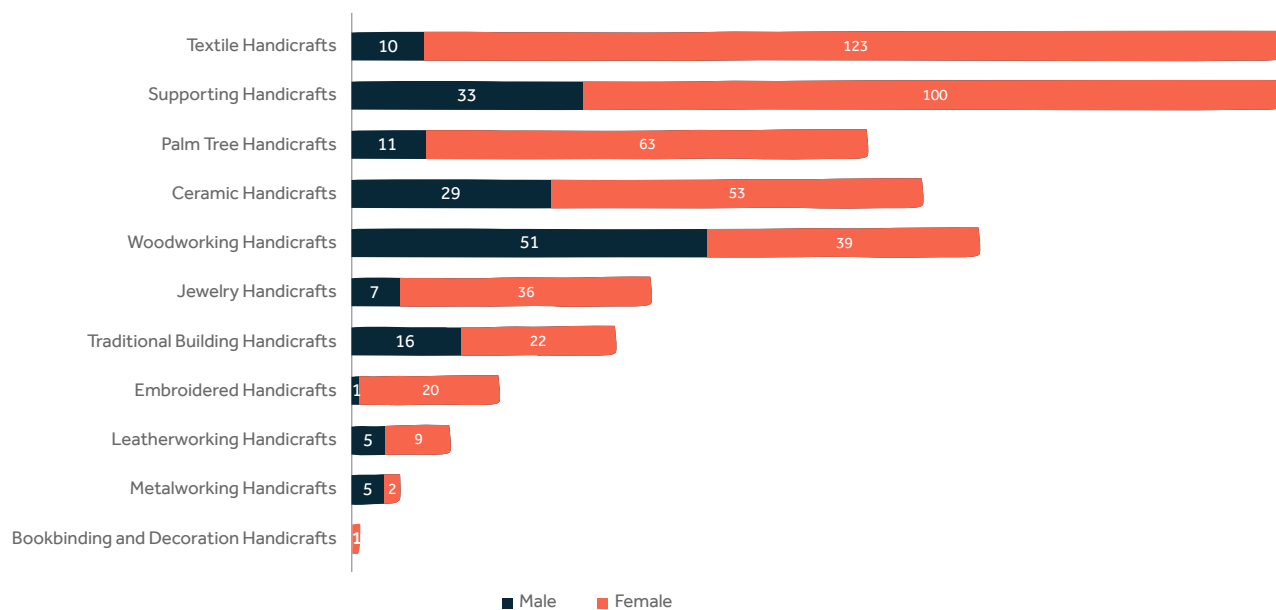


Figure 33: Artisans Licensed through the Abde'a Platform by Field, 2022 ⁽¹¹⁰⁾

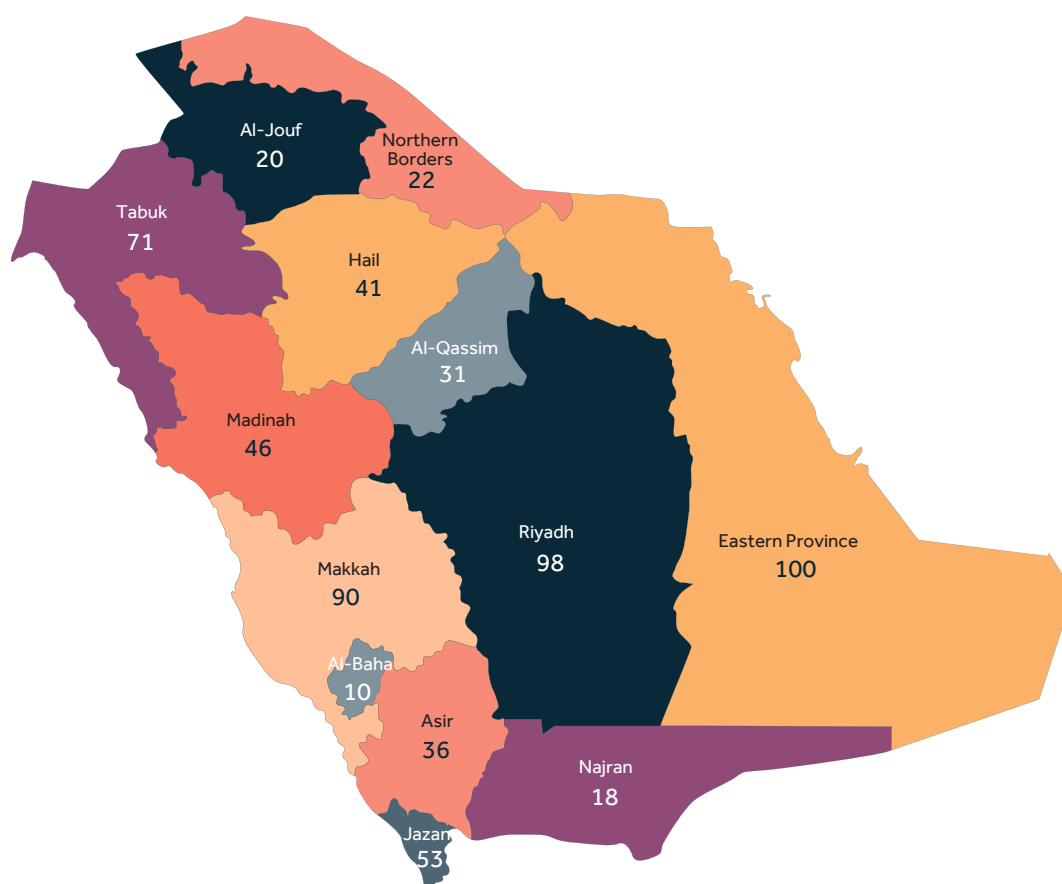


Figure 34: Provincial Artisans Licensed through the Abde'a Platform, 2022 ⁽¹¹¹⁾



Copyright Works

Given the relationship between cultural production indicators, as seen in this chapter, and copyright works within the Copyright Law, reviewing the figures for voluntary registration of copyright works is essential. Development in the intellectual property ecosystem in Saudi Arabia emphasizes this importance as reflected in the launch of the National Intellectual Property Strategy (NIPST), regulatory expansion of activity and authority of the Saudi Authority for Intellectual Property (SAIP), SAIP initiatives to encourage registration of works, and “Intellectual property consultancy

clinics” for entities in the cultural ecosystem offering support and guidance for enterprises and practitioners in cultural sectors. Due to these developments, there was a notable increase last year in applications for voluntary registration of copyright works and registration certificates, with 376 certificates issued compared to 154 in 2021.⁽¹¹²⁾ However, the most significant from these data is the increase in the percentage of registration applications that resulted in certificates in 2022 compared to the previous two years, with 44.87%, compared to 18.58% and 23.95% in 2020 and 2021, respectively (Figure 35). Such growth rates may not give accurate production rates, but they reflect a growing awareness of the importance of copyright registration. Written works comprised the majority of voluntary registration certificates in 2022 (Figure 36), with 38.3% of total certificates. Works in arts and applied arts came third, with 19.2%, followed by architectural works and photographs at 4% each.⁽¹¹³⁾

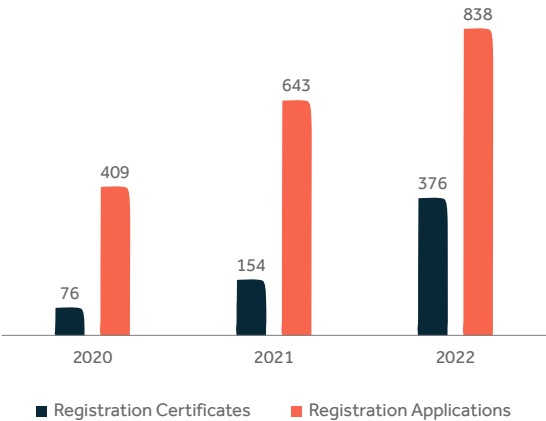


Figure 35: Voluntary Registration Applications and Certificates for Copyright Works, 2020-2022⁽¹¹⁴⁾

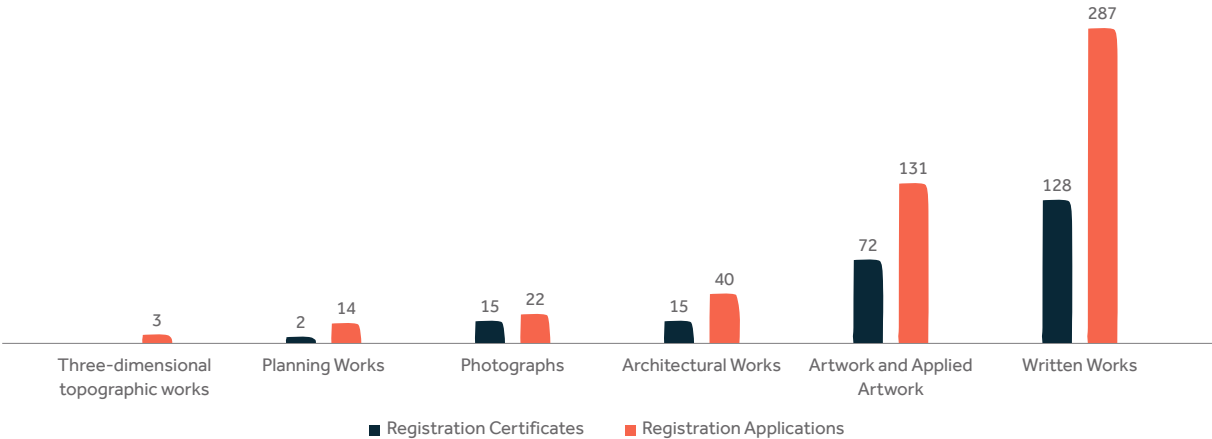


Figure 36: Voluntary Registration Applications and Certificates for Works Related to the Cultural Sector, 2022⁽¹¹⁵⁾

Creativity

The chapter focuses on the concept of creativity that is linked to the uniqueness of artistic and literary work. It uses this concept to provide an objective monitoring and analysis of the trends in creative works that have won awards both locally and internationally. This year, the report monitored 16 national cultural awards, 22 local awards, as well as 26 regional and international awards that were won by Saudi creators or creative works from Saudi Arabia. Notably, the film, language, and visual arts sectors were the top winners of local awards, while theatre, architecture, and design sectors received more international awards.

National Cultural Awards

The National Cultural Awards initiative held its second edition this year, granting 16 awards. This was a decrease from last year's 35 awards, as the competition was limited to only first-place winners in each category as opposed to first-, second-, and third-place winners as was done previously. Similar to

the first edition, the judging standards for each category relied on five main criteria: cultural production, community engagement, status and connection, non-governmental support, and global reach.

The initiative included 14 branches across 11 cultural sectors and the cultural institution's branch, which had three tracks. The Diriyah Gate Development Authority (DGDA) won the public sector track award, the Music Home School of Art won the private sector track award, and the Misk Art Institute won the non-profit track award. Dr. Abdulaziz Alsebil was awarded the Cultural Pioneer Award, Bader Alhamoud won the Youth Cultural Award, and Kifah Bu Ali won the Literature Award for her children's books. This year's Literature Award was dedicated to children's literature, reflecting the growing support for initiatives related to children's culture and literature. Kifah Bu Ali's stories focus on children's behaviors, mental health, and family relationships, including *Hazim Doesn't Like Loud Noises*. The Translation Award was won by Sharif Baqnah Alshahrani, a poet and English-Arabic translator known for his literary translations, including *After I Was Born, They Locked Me Inside: One Hundred Global Stories in Translation*. Jarir Bookstore won the Publishing Award.



The National Awards in Saudi Arabia were characterized by inspiration drawn from the country's cultural heritage. For instance, Chef Abdulsamad Alhawsawi won the Culinary Arts Award for his expertise in Saudi cuisine. Dr. Samira Alotaibi, a fashion designer and academic specializing in design and textiles, won the Fashion Award. Her fashion designs were inspired by traditional Saudi dress. This is consistent with significant production trends in design and fashion, as highlighted in this chapter. It is worth noting that women won the Fashion Award and the Literature Award this year, which is in line with women's dominance in the production of fashion and children's literature. Ahmed Alnughaythir, a researcher who has published several studies on archaeology and inscriptions, won the National Heritage Award. He also organized an exhibition titled "From Drawings to Letters... Life" on petroglyphs and stone carvings in Saudi Arabia. Mohammad Shafee, an architect who has designed several mosques where sustainability was a critical focus, won the Architecture and Design Award.

Musical composer and performer Bandar Obaid Ibrahim, whose most famous musical works include Al-Yamama music piece, won the Music Award. Producer Faisal Baaltuyur won the Film Award; Sattar, one of the films Baaltuyur helped produce, was the leading film at the Saudi box office in Q1 2023.⁽¹¹⁶⁾ Director and playwright Ali Khobrani won the Theater and Performing Arts Award; Khobrani's productions range from realist and symbolic works to children's theater. Some of his most famous plays are Safha Ula and Bermuda. Artist Muhannad Shono won the Visual Arts Award; he is known for using line and shadow concept in his artwork, including his latest piece, I See You Brightest in the Dark, at Noor Riyadh

Table 8: National Cultural Award Winners, 2022 ⁽¹¹⁷⁾

Award	Winner
Literature	Kifah Bu Ali
Translation	Dr. Sharif Baqnah
Publishing	Jarir Bookstore
Theater and Performing Arts	Ali Khobrani
Film	Faisal Baaltuyur
National Heritage	Ahmed Alnughaythir
Music	Bandar Obaid Ibrahim
Visual Arts	Muhannad Shono
Fashion	Dr. Samira Alotaibi
Culinary Arts	Abdulsamad Alhawsawi
Architecture and Design	Mohammad bin Ibrahim Shafee
Cultural Pioneer	Dr. Abdulaziz Alsebail
Youth Culture	Bader Alhamoud
Cultural Institutions	Public sector: Diriyah Gate Development Authority Private sector: Music Home School of Art Non-profit institutions: Misk Art Institute





Local Awards

This report tracked 23 awards in approximately 63 branches and tracks throughout 10 different cultural sectors (Figure 37). Film awards were on top of the list due to the Saudi Film Festival and the Red Sea International Film Festival, followed by language and visual art awards, then publishing and literature. New awards were launched this year, such as the King Salman Global Academy Prize for Arabic Language, which includes four branches: Arabic language teaching, Arabic language computing and technical applications, Arabic language research, and raising linguistic awareness and community initiatives. Winners of this award were also two entities from Saudi Arabia: Al-Faisal Cultural House and Arabic for All Company, along with Saudi researcher Abdulaziz bin Ali Al-Harbi (Table 9). King Abdulaziz University also launched the first edition of its Prince Khalid Al-Faisal Award for Language of the Noble Quran entitled "Arabic Language

and Entrepreneurship." The award targets individuals and institutions via three tracks: academic, technical, and community leadership. Another track is also dedicated to Linguist of the Year, whose winner this year was Mahmoud Ismail Saleh.

Moreover, among the awards launched this year is the AIUla Design Award, presented by AIUla Arts, aimed at designs inspired by AIUla nature and heritage. Reem Bashawri won the award this year.⁽¹¹⁸⁾ The SASCA, supported by the University of Business and Technology, launched the Radwa Art Award this year aimed at abstract artists in Saudi Arabia, and its first edition, won by two male artists and eight female artists, was entitled "Authenticity and the Contemporary."⁽¹¹⁹⁾ The fifth award launched for the first time in 2022 was also in the field of visual arts: the Kingdom Photography Award from the Visual Arts Commission, won by three photographers from Saudi Arabia: Mohammed Abdulrahman Lahi, Riyadh Abdulelah Al Malahi, and Osama Ali Abusunun.

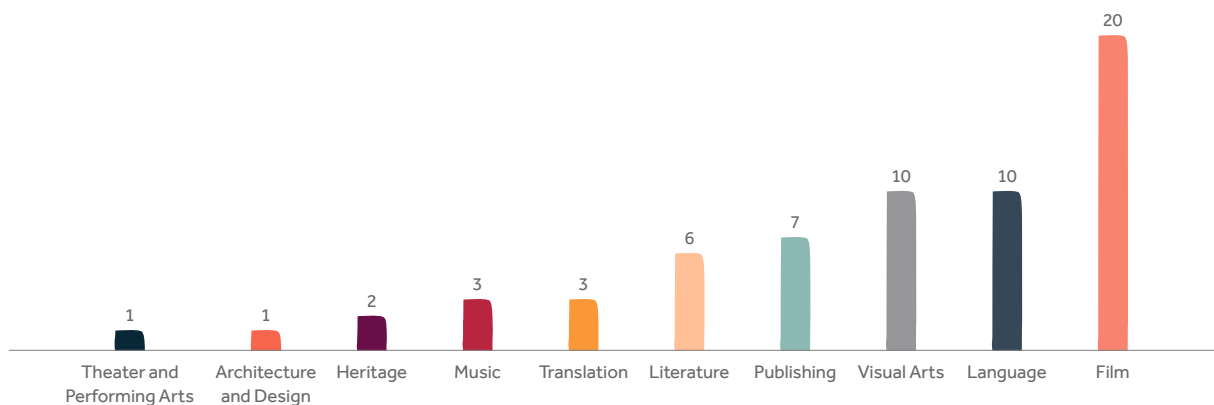


Figure 37: Local Awards and their Tracks by Sector, 2022



Table 9: Saudi Winners of King Salman Global Academy Prize for Arabic Language, First Edition, 2022⁽¹²⁰⁾

Track	Winners
Arabic Language Teaching and Learning	Arabic for All
Arabic Language Research and Academic Studies	Al-Faisal Cultural House
Raising Linguistic Awareness and Innovation in Linguistic Social Initiatives	Dr. Abdulaziz bin Ali Al Harbi

Table 10: Winners of Prince Khalid Al-Faisal Award for Language of the Noble Quran, First Edition, 2022⁽¹²¹⁾

Track	Winners
Academic Leadership (institutions)	First place: Arabic Language Academy on the World Wide Web Second place: Initiative of Umm Al-Qura Series for Teaching Arabic to Non-native Speakers
Academic Leadership (individuals)	Muhammad Ali Al Omari for the Lisanun Mobeen linguistic platform for simplification of Arabic language studies
Technical Leadership (institutions)	First place: Teach Me Arabic App Second place: Adab E-Platform and Tareeb Platform for Scientific Terminology translated into Arabic
Technical Leadership (individuals)	Ghassan Rashid Al-Nowaimi and Abdullah bin Shahwan Al-Maliki for the Audio Ketab Platform
Community Leadership (institutions)	First place: Faz Educational Consulting Second place: Tahaddath Al Arabiya
Community Leadership (individuals)	Ziyad Al Drees for the Celebrate World Arabic Language Day initiative
Linguist of the Year	Mahmoud Ismail Saleh

Festival and Forum Awards

Cultural and artistic festivals are a central pillar for supporting creative professionals. One of the most prominent is the Saudi Film Festival, where participating films compete in feature-length and short-film competitions. As shown in Figure 38, Quareer won the most significant share of awards this year, including the Golden Palm Awards for Best Feature-Length Film, Best Cinematography, and Best Produced Screenplay, as well as the Jury Award. The film *Kayan* won the Golden Palm Award for Best Soundtrack, and Samar Shesha won Best Actress for her role in the same film. Ibrahim Al-Hasawi won the Golden Palm Award for Best Actor for his role in the film *Before We Forget*. In the short film competition, two films, *Memories from the North* and *Zawal*, won the Golden Palm Awards for Best Short Documentary and Best Short Film, respectively. At the Red Sea International Film Festival, the Yusr Awards were presented for the second time this year. Two Saudi films won the awards: *Within Sand* by Moe Alatawi won the Jury Award at the Red Sea Festival. *How I Got There*, a joint Saudi-Kuwaiti production won the Best Saudi Film Award from Film AlUla Agency. Actress Sarah Taibah won the Chopard Young Rising Star Award.⁽¹²²⁾

In the theater sector, the Fourth Dammam Script Forum was held this year, and three plays won awards: *Indimaj*, a children's



play by playwright Sultan Ahmad Alnuh, for first place, Meshaal Alrashid's play *Irtibak* for second place, and *Najma* by Musa Abu Abdullah for third place. At the fifth Narrative House Short Story Festival, also held in Dammam, Muhammad Akafi, Rawan Aldaham, and Shahd Alanzi won first, second and third places, respectively.⁽¹²³⁾



Figure 38: Saudi Film Festival, Eighth Edition, 2022

Institutional Creativity and Excellence

Despite the focus of this chapter on creative works by individuals, it is essential to mention cultural and artistic awards that institutions won, be they public, community, or commercial, to give a more overall view of the creative environment and the incentives and support it receives. One of the most prominent awards is the Makkah Excellence

Award, presented by the Makkah Province Emirate, aimed at institutions excelling in ten fields, including cultural excellence. Other significant awards include the Media Excellence Award presented by the Ministry of Media, the King Abdullah bin Abdulaziz Award for Translation, and the Riyadh International Book Fair Award launched by the Literature, Publishing, and Translation Commission for the first time in 2020.

Table 11: Selected Award-winning Saudi Institutions, 2022

Institution	Track	Award
Heritage Commission for Prince Mohammed bin Salman Project for the Development of Historical Mosques	Cultural Excellence	14 th Makkah Excellence Award
Heritage Commission for the Artisans House Initiative	Excellence in National Achievement	10 th Princess Seetah bint Abdulaziz Award for Excellence in Social Work
Saudi Broadcasting Authority for the Saudi Arda Film	Television Producer Track	3 rd National Media Awards
Tourism Development Fund for People of Tourism Film	Tourism Film Track	
Ithra for the song "We Sing for the Nation"	Patriotic Song Track	
Aramco for the Qafilah Podcast	Radio and Podcast Track	
Obeikan	Translation Award for Efforts by Commissions and Institutions	10 th King Abdullah Bin Abdulaziz Award for Translation
Jarir Bookstore	Translation Excellence Award	3 rd Riyadh International Book Fair Award
Dar Molhimon	Award for Excellence in Publishing Saudi Content	
Tashkeel	Publishing Excellence Award	
Asala	Award for Excellence in Publishing (Children's Category)	
Madarek	Award for Excellence in Digital Publishing	
Jadal Publishing and Distribution	Readers' Choice Award	

Regional and International Awards

The report tracked 26 creative professionals or works from Saudi Arabia that won awards outside Saudi Arabia in 2022. Although most local awards were in film, language, and digital arts, the report noted that creative works in architecture, design, theater, and performing arts received more international and regional recognition. This indicates a significant global presence of Saudi creativity in these fields. For instance, The Wooden Leg Show play won three awards

at the Zarqa Summer Festival in Jordan. The awards included Best Production, awarded to Mukhlid Al-Zayudi; Best Lighting, awarded to Muhammad Al Ayish; and Best Actor, awarded to Kameel Al-Ali. Additionally, Al-Ali won the Best Actor in a Leading Role Award at the Cairo International Gathering for University Theater. Badr Al-Ghamdi won the Best Actor award for his role in Moving Resident at the Cairo International Days for Monodrama Festival. The same play also won the Best Script award at the 12th Alexandria International Theater Festival (Table 12).

In the architecture and design field, nine designs from Saudi Arabia won 10 international awards; most judging criteria focused on sustainability, innovation, and local cultural style. In Al-Diriyah, the JAX 01 design won the 3rd LOOP Design Award, and the design of the Diriyah Art Futures project won

the Rethinking the Future Award; in AlUla, the design of the Habitas AlUla Hotel won the Hospitality and Design Award; and in Riyadh, four designs won international awards (Figure 39). As shown in Table (13), this report mentions six other awards won by Saudi creative professionals in culture, literature, and film.

Table 12: List of Saudi Works Winning Regional and International Awards in Theater and Performing Arts, 2022⁽¹²⁴⁾

Competition/ Festival	Award	Winner	Theatrical Work
Zarqa Summer Festival	Best Production	Dr. Mukhlid Al-Zayudi	The Wooden Leg Show (play)
	Best Lighting	Muhammad Al Ayish	The Wooden Leg Show (play)
	Best Actor in a Supporting Role	Kameel Al-Ali	The Wooden Leg Show (play)
Cairo International Days for Monodrama Festival	Best Actor	Badr Al-Ghamdi	Moving Resident (play)
Cairo International Festival for Experimental Theater	Recognition	Fahad Rada Al-Harhi	Recognition for overall theater experience and role in Saudi theater
12 th Alexandria International Theater Festival	Best Script (tie)	Fahad Rada Al-Harhi	Moving Resident (play)
Cairo International Gathering for University Theater	Best Actor in a Leading Role	Kameel Al-Ali	The Wooden Leg Show (play)
Sharm El-Shaikh International Theater Festival for youth	Best Group Performance "Street and Unconventional Spaces"	Staff	Free Prisoners (play)
	Recognition	Dr. Sami Abdullatif Al-Juman	Recognition for overall theater experience and role in Saudi theater
Script Writing Competition, Sharjah Government Culture Circle	Third Place in Script Writing	Yasir Yahya Madkhali	The Legend of the Shrine (play)



UAE Innovates Award	Saudi Arabia Pavilion at Expo 2022 Dubai	Dubai, United Arab Emirates
BIE Day Awards – Gold Award for Architectural Engineering	Saudi Arabia Pavilion at Expo 2022 Dubai	Dubai, United Arab Emirates
American Institute of Architects (AIA) Middle East	1364 AH project	Riyadh City
42 nd World Architecture Awards	Sameem Tower	Riyadh City
	Visual Arts Commission building	Riyadh City
	Mixed-Use Tower (Al-Jild Tower)	Taif
Hospitality and Design Award	Habitas AlUla hotel	AlUla
Silver Medal winner at the Urban Design and Architectural Design Awards	Riverwalk complex	Riyadh City
3 rd LOOP Design Awards	JAX 01	Al-Diriyah
Rethinking the Future (RTF) Awards 2022	Diriyah Art Futures	Al-Diriyah

Figure 39: List of Designs Winning International Awards in Architecture and Design, 2022⁽¹²⁵⁾





Table 13: Selected International Awards won by Saudi Creative Professionals in Various Fields, 2022

Award	Track	Recipient
Shaikh Zayed Book Award	2022 Cultural Public Figure	Dr. Abdullah Al-Ghathami
Sharjah Arabic Poetry Festival	Golden Rhymes Award	Saud Al-Yusuf Hawra Al-Hamili Hassan Al-Zahrani
Sharjah Award for Arab Creativity	Field: Critique - third place	Muidh Saud Al-Harthi
Septimius Awards	Best Experimental Film	The Journey
Global Film Festival Awards - Los Angeles	Best Screenplay	Pardon Me
Global Film Festival Awards - Los Angeles	Best Drama Short	Pardon Me

References

- (1) See the Management and Conservation Chapter for more details on support and empowerment programs and initiatives.
- (2) See the Glossary for more details.
- (3) Given that surveying publishing houses this year was unfeasible, the lack of regular centralized data measuring publishing indicators in the Kingdom, and the time required for regulatory deposit and registration data to settle at levels that reflect the reality of publishing, this year's report shows only data on literary publishing. See the Methodology Appendix for more details.
- (4) See the Methodology Appendix for more details on creating the bibliography. See the Glossary for a definition of "Literary Publishing."
- (5) Khaled Al-Youssef, Bibliography of Literary Publishing in the Kingdom of Saudi Arabia, 1444 AH/2021-2022 CE: Bibliometric Bibliographical Study.
- (6) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia 2019: Features and Statistics (Riyadh, Ministry of Culture, 2020), 388.
- (7) Khaled Al-Youssef, op. cit.
- (8) Khaled Al-Youssef, op. cit.
- (9) Khaled Al-Youssef, op. cit.
- (10) Khaled Al-Youssef, op. cit. "Joint Publishing" refers to publishing cooperation agreements between literary clubs — or other local publishers — and publishers outside Saudi Arabia.
- (11) Khaled Al-Youssef, op. cit.
- (12) Khaled Al-Youssef, op. cit.
- (13) Khaled Al-Youssef, op. cit.
- (14) Khaled Al-Youssef, op. cit.
- (15) Khaled Al-Youssef, op. cit.
- (16) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia 2021: Culture in Public Space (Riyadh, Ministry of Culture, 2022), 74.
- (17) Khaled Al-Youssef, op. cit.
- (18) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia 2020: Digitalization of Culture (Riyadh, Ministry of Culture, 2021), 259.
- (19) See the Glossary for a definition of "E-book."
- (20) Note that the Children's Book Digitization track was announced in early 2023, and the Audiobook track had not begun when this report was published.
- (21) Data from the Literature, Publishing, and Translation Commission (March 08, 2023).
- (22) A research may address one or more topics. See the Methodology Appendix for more details.
- (23) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (24) Ministry of Culture, op. cit. 74.
- (25) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (26) Ministry of Culture, op. cit. 70-71.
- (27) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (28) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (29) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (30) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (31) Ministry of Culture, op. cit. 74.
- (32) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).
- (33) Data from the Literature, Publishing, and Translation Commission (April 11, 2023).

- (34) A Saudi film is any film that fulfills the "cultural test" qualifications, a rating system with four criteria: 1. Content: The film must be in Arabic, and the characters and setting must be within Saudi Arabia. 2. Creativity, heritage, and diversity. 3. The principal shooting locations and production studios must be in Saudi Arabia. 4. A percentage of the staff must be Saudi. See the Glossary for more details.
- (35) Data from the Film Commission (May 28, 2023) and Tilfaz11 (April 11, 2023).
- (36) Ibid.
- (37) Data from the Film Commission (August 23, 2023).
- (38) Ministry of Culture, op. cit. 80.
- (39) Data from the Red Sea International Film Festival Foundation (April 9, 2023); Ministry of Culture, op. cit. 80.
- (40) Saudi Film Festival, "Top Works Compete," Twitter (May 11, 2022), retrieved on July 13, 2023, https://twitter.com/SA_FilmFestival/status/1524353370055655426?s=03; "Saudi Talent Set To Shine at the Second Edition of The Red Sea International Film Festival," Red Sea International Film Festival, retrieved on July 13, 2023, <https://redseafilmfest.com/en/press/saudi-talent-set-to-shine-at-the-second-edition-of-the-red-sea-international-film-festival>
- (41) Saudi Film Festival, "We are Happy to Announce the Winners," Twitter (June 3, 2022), retrieved on July 13, 2023, https://twitter.com/SA_FilmFestival/status/1532485113115824133?s=03
- (42) Given the limited data available, this chapter limits itself to Rotana statistics as a sample of commercial music production in Saudi Arabia.
- (43) See the Glossary for a definition of "Saudi Song."
- (44) Data from the General Entertainment Authority (April 09, 2023).
- (45) Data from the Music Commission (August 23, 2023).
- (46) Data from Rotana (March 21, 2023) and (February 01, 2022).
- (47) Data from Rotana (February 01, 2022) and (March 21, 2023).
- (48) Data from the Music Commission (May 4, 2023); Ministry of Culture, op. cit. 82.
- (49) See the Glossary for a definition of "Podcast."
- (50) See the Methodology Appendix for more details.
- (51) Data from the Ministry of Culture (May 16, 2023).
- (52) Data from the Music Commission (July 12, 2023). Note that there were 25 episodes in the podcast's first season, which began in 2021 and ended in 2023.
- (53) Data from King Abdulaziz Public Library (May 11, 2023)
- (54) Data from Thmanyah Publishing and Distribution (March 02, 2023).
- (55) Ministry of Culture, op. cit. 187; see the Cultural Participation section for more details on non-profit organizations.
- (56) See the Glossary for a definition of "Theater Performance."
- (57) Ministry of Culture, op. cit. 77.
- (58) Ministry of Culture, op. cit. 76.
- (59) Data from the Theater and Performing Arts Commission (March 08, 2023).
- (60) Total theater performances, according to the General Entertainment Authority data and Theater and Performing Arts Commission data.
- (61) Total theater performances, according to the SASCA data and the Theater and Performing Arts Commission data.
- (62) Data from the Theater and Performing Arts Commission (March 02, 2023); data from the General Entertainment Authority (April 09, 2023); data from King Abdulaziz Public Library (May 11, 2023); data from the SASCA (May 16, 2023).
- (63) Data from the SASCA (July 27, 2023); Ministry of Culture, op. cit. 76.
- (64) See the Glossary for a definition of "Performance."
- (65) Data from the Theater and Performing Arts Commission (March 2, 2023); data from the General Entertainment Authority (April 09, 2023); data from the Royal Commission for AlUla (March 12, 2023); data from the SASCA (May 16, 2023); data from Ithra (May 16, 2023).

- (66) Data from the Theater and Performing Arts Commission (March 2, 2023); data from the General Entertainment Authority (April 9, 2023); data from the Royal Commission for al-'Ula (March 12, 2023); data from the SASCA (May 16, 2023); data from Ithra (May 16, 2023).
- (67) See the Glossary for more details.
- (68) Note that the data on artworks included in all exhibitions are limited, and figures may represent the total artworks included in the exhibitions of a single institution or the number of works included in each exhibition.
- (69) Ministry of Culture, op. cit. 83.
- (70) The survey included 17 art galleries in 2021 and 19 in 2020.
- (71) See the Methodology Appendix for more details on the art gallery survey; Ministry of Culture, op. cit. 83.
- (72) Art Basel & UBS, The Art Market 2018 (Basel, The Art Basel, 2018), 180-181.
- (73) Ministry of Culture, op. cit. 83.
- (74) Data from the Visual Arts Commission (March 19, 2023).
- (75) Data from Misk Art Institute (March 01, 2023).
- (76) Data from the Diriyah Biennale Foundation (April 27, 2023).
- (77) Data from Madinah Arts Center (March 09, 2023).
- (78) Data from Art Jameel (February 26, 2023).
- (79) Data from Ithra (May 16, 2023).
- (80) Data from Royal Commission for AlUla (May 01, 2023).
- (81) Data from the SASCA (May 16, 2023).
- (82) Data from the Visual Arts Commission (March 19, 2023).
- (83) Data from the Royal Commission for Riyadh City (April 26, 2023); Ministry of Culture, op. cit. 199.
- (84) Artworks, Riyadh Art, retrieved on July 05, 2023, <https://riyadhart.sa/ar/artworks>.
- (85) Note that the 2021 edition of this report published different figures as different methods were used to calculate and read the data collected from the relevant entity last year. Falwa Nadhir contributed five works, while Fahad Al-Hujailan, Jawhara Al Saud, and Lulua Al-Hammoud each contributed two.
- (86) Data from the Diriyah Biennale Foundation (April 27, 2023).
- (87) Data from the Architecture and Design Commission (March 01, 2023).
- (88) Architecture and Design Commission, "Under the Guidance of His Royal Highness the Minister of Culture," Twitter (December 01, 2021), retrieved on July 07, 2023, <https://twitter.com/ArchMOC/status/1466017839052169218?s=20>.
- (89) Ministry of Culture, op. cit. 87.
- (90) See the Glossary for a definition of "Saudi Song."
- (91) Under the leadership of HRH the Crown Prince, the Sports Boulevard Foundation Board of Directors launched Urban Design Code for areas on Prince Muhammad bin Salman bin Abdulaziz Road, SPA (July 21, 2022), retrieved on July 07, 2023, <https://www.spa.gov.sa/2371389>.
- (92) Data from the Architecture and Design Commission (March 01, 2023), Princess Nourah bint Abdulrahman University (March 22, 2023), Imam Abdulrahman Bin Faisal University (March 21, 2023), Jazan University (March 30, 2023), Prince Sultan University (March 12, 2023), Qassim University (March 26, 2023), King Faisal University (April 06, 2023), Umm Al-Qura University (April 12, 2023), and Majmaah University (March 27, 2023).
- (93) Ibid.
- (94) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia 2019: Features and Statistics (Riyadh, Ministry of Culture, 2020), 105; Ministry of Culture, op. cit. 88.
- (95) Data from the General Entertainment Authority (April 09, 2023).
- (96) "Fashion Commission Kicks off Second 100 Saudi Brands Program," SPA (October 11, 2022), retrieved on April 13, 2023, <https://www.spa.gov.sa/w1796668>.

- (97) Ministry of Culture, op. cit. 107.
- (98) Data from the Fashion Commission (March 28, 2023).
- (99) Data from Visual Arts Commission (March 29, 2023); include the number of artists and designers participating in the open studio residency.
- (100) Data from Ithra (May 16, 2023).
- (101) Data from Princess Nourah bint Abdulrahman University (March 22, 2023).
- (102) Data from Al-Qassim University (March 26, 2023).
- (103) Data from the King Faisal University (April 06, 2023). The two shows contain visual arts and fashion sections; this is the total number of participants in both shows and includes fashion designers and artists.
- (104) Data from Jazan University (March 30, 2023).
- (105) Data from the Heritage Commission (May 02, 2023).
- (106) Ibid.
- (107) Ibid.
- (108) See, for example, Wilson, Grace. "Income Instability Among Artisans in South Asia." Ballard Brief, (October 2022), accessed on the 9th of July 2023, www.ballardbrief.byu.edu; Almamari, Badar. "What Happens When Women Dominate Traditional Craft Industries." SAGE Open 5, no. 2 (April 2015), <https://doi.org/10.1177/2158244015587562>.
- (109) Data from the Heritage Commission (May 02, 2023).
- (110) Ibid.
- (111) Data from the Heritage Commission (May 02, 2023).
- (112) Data from the Saudi Authority for Intellectual Property (March 12, 2023).
- (113) Ibid. See the Glossary for more details.
- (114) Ibid.
- (115) Data from the Saudi Authority for Intellectual Property (March 12, 2023).
- (116) General Commission for Audiovisual Media, "To achieve @SaudiVision2030 for diversification of income and entertainment sources," Twitter (April 9, 2023), retrieved on June 18, 2023, <https://twitter.com/gcamsa/status/1645131997910560773>.
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- (122) The Yusr Awards, Red Sea International Film Festival, retrieved on July 10, 2023, <https://redseafilmfest.com/ar/the-yusr-awards>.
- (123) Data from the Saudi Arabian Society for Culture and Arts (May 16, 2023).
- (124) Data from the Theater and Performing Arts Commission (March 02, 2023).
- (125) Data from the Architecture and Design Commission (March 01, 2023).

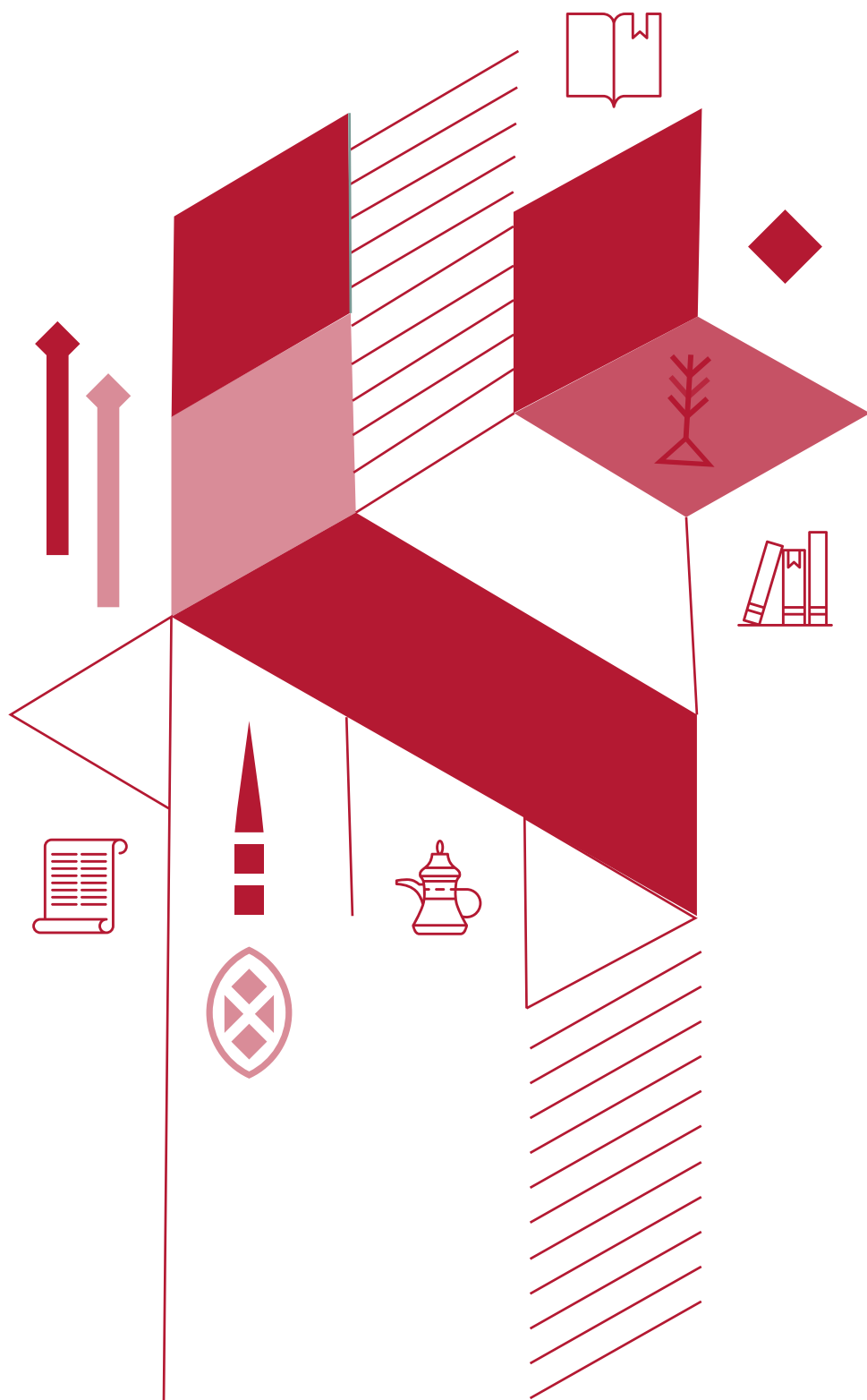
3

Chapter Three



Knowledge and Skills

- Education and Culture
- Art and Cultural Training in the Kingdom





Education and training have a crucial role in imparting knowledge and skills in the creative and cultural fields while also preserving local heritage and sharing it across generations. This chapter evaluates the readiness of the cultural education and training sectors to achieve this by monitoring significant regulatory and organizational changes in both sectors, examining the presence of culture and art in public education curricula, assessing efforts to train teachers to teach these curricula, and monitoring the qualitative progress in the quality of culture and art extracurricular activities. In terms of higher education, the chapter reviews the availability of culture and art majors by analyzing the number of graduates from higher education institutions and external scholarship programs. Women accounted for 70% of these graduates, with 68% of them in the language and literature majors. As for cultural and art training, the chapter provides an overview of the efforts to improve the sector's organization and output quality while linking it more effectively to cultural industries and professions. It presents a descriptive and quantitative overview of the actions taken by governmental, private, civil, and cultural stakeholders. The chapter notes the growth in cultural license applications through the Cultural License Platform (Abde'a), with 50 granted for training facilities and 51 for training programs this year. It also provides basic statistics for trainees from the cultural sectors in institutions affiliated with the Technical and Vocational Training Corporation (TVTC), which enrolled 18,760 trainees. Most of them were signed up for short development programs, with 69% of these trainees in the cultural sector. Cultural bodies presented several specialized training programs, such as cultural incubators and intensive programs.

Education and Culture

The growth of the cultural sector is usually closely tied to the education and practice of younger generations in culture and art at various stages of their education. The development of cultural and artistic skills, talents, and abilities begins during the stages of public education, with higher education providing an appropriate environment for their refinement. Following this, students receive technical and vocational training to become part of the culture and art job market. In 2022, efforts were exerted to strengthen the presence of culture and art in public and higher education. The Ministry of Culture (MoC) has launched the Cultural Talent Development Strategy in partnership with the Ministry of Education (MoE). Updated public education curricula now include more materials on culture and art. At the same time, teachers have received specialized training in new fields of study to better equip them for teaching these novel subjects.

Cultural Talent Development Strategy

Education, both public and higher, is the primary source of talent in the culture and art sectors. There are consistently high expectations that such education would fulfill the increasing demand of the relevant labor market for talent and qualified staff. Despite the attention accorded to culture and art since the inception of modern education in Saudi Arabia,

the development of the education and training ecosystem in different cultural sectors has acquired new momentum from the developmental transformations Saudi Arabia is currently undergoing, most notably Saudi Vision 2030. In an effort to bridge the gap between the need to create jobs in different cultural sectors and the number of graduates and qualified talent to take on these jobs, the MoC has partnered with the MoE to launch its flagship Cultural Talent Development Strategy in December 2022. The Strategy aims to address this issue and involves all sectors of the educational and training systems.⁽¹⁾ The Strategy has outlined six key goals





(Figure 1) summarized as follows: raising awareness of the importance of cultural skills and professions; discovering and nurturing talents; inclusion and strengthening of culture and art in public education; providing higher education students with educational and training programs that qualify them for the culture and art sector labor market; and sustained professional empowerment of culture and art practitioners and entrepreneurs.

The Strategy has considered the fact that developing skills is a long process that begins with laying solid foundations. This involves changing regulations and policies in alignment with the six goals, launching academies and programs specializing in culture and art across all stages of education, strengthening teachers' skills, funding education opportunities, and launching entrepreneurship programs.⁽²⁾



Figure 1: Goals of Cultural Talent Development Strategy

Culture and Art in Public Education

In 2022, there were further developments in the reinforcement of culture and art in public education following the creation of new art and culture-oriented subjects. This development has been part of structural transformations in the education system.⁽³⁾ While curriculum development was the primary

focus of the year and a prominent aspect this year, teacher training has also been a significant part of the efforts made in 2022. The MoE launched a diploma program to train teachers in new subjects, including art and culture. At the same time, relevant extracurricular activities have gained momentum across different student groups in terms of type and student engagement.

Developments in Culture and Art Subjects in Public Education

The 2021 edition of the report provided an overview of cultural and art teaching in public education, with a focus on the three subjects mainly related to culture and art: Arabic language, social studies, and art education. The report also highlighted the introduction of the subject of critical thinking in the third year of middle school and the first year of high school. Last year, the MoE introduced the subject of art to second-year high school students. In 2022, the first batch of students in the Pathways System studied the subject of art for the first time. This was mentioned in last year's report.⁽⁴⁾ These students study the subject for one semester, three classes per week, covering three pathways: general pathway and two specialized pathways: business management and the Islamic sciences. The goal is to help the students produce a group end-of-term project that demonstrates the knowledge they have gained from their chosen course of study, which exposes students to a variety of arts, including visual arts, digital arts, and performing arts. The course covers the roles of these arts and their global history, as well as the history of Saudi arts, including theater and traditional ones.⁽⁵⁾ Teachers and students both enjoy incorporating these important topics into the learning process as they add an element of fun. Additionally, showcasing end-of-term projects in school exhibitions helps students develop a deeper connection with the subject by providing a practical application of the theoretical concepts.⁽⁶⁾ These subjects are part of building the national framework of culture and art education that has taken shape in 2022 through the designation of nine cultural fields to be gradually

introduced to public education after their adoption by the Education and Training Evaluation Commission (ETEC), namely visual arts, performing arts, music, language, literature, design technology, media arts, heritage, fashion arts, and culinary arts. The gradual introduction of these subjects will start from kindergarten to high school between 2023 and 2030. Educational units for musical arts have been introduced in kindergarten.⁽⁷⁾

Training Teachers to Teach the New Cultural Subjects

With the introduction of a group of new subjects for public education by the MoE, a need arose to train teachers to teach them. This was especially important given the disparity between the qualifications of many teachers and these new subjects, with many of them teaching them for the first time. To address this issue, the MoE launched the Optimal Investment Program, which qualifies educators with a diploma to teach these subjects. However, since the program is new and has yet to produce enough teachers, the MoE has adopted a temporary measure. Until enough teachers are trained to teach the new subjects, the MoE will assign teachers to teach critical thinking and art education. Priority is given to teachers with qualifications in psychology and social studies to teach critical thinking. If there are no teachers with qualifications in these prioritized fields, then teachers qualified in Islamic education are considered. The priority of teaching the art subject is assigned to art education teachers, followed by physical education teachers.⁽⁸⁾ The Optimal Investment Program is an optional choice offered to qualified teachers in fields where teachers are





abundant, such as Islamic education, Arabic language, and social studies. Teachers study at local Colleges of Education for two semesters and then attain a higher diploma in teaching critical thinking and art education. To enable them to continue their morning teaching work, the diploma is offered in the evening in a hybrid format (60% of the study is in person, and 40% is distance learning).⁽⁹⁾ In 2022, 26 teachers joined the arts pathway in the first stage, and the number increased to 106 in the second stage of the program.⁽¹⁰⁾

In addition to the Optimal Investment Program, the MoE has introduced other programs to train teachers in new culture and art subjects, most notably a program that aims to train 25,000 teachers in school theater skills to allow teachers to train students. This program is run in partnership with the Theater and Performing Arts Commission.⁽¹¹⁾ The MoE also partnered with the MoC to provide training in audio arts to more than 7,000 female kindergarten teachers. Additionally, it trained 32 special education teachers to teach children with autism and Down Syndrome about musical theater. This initiative is part of the culture and art program for disabled students.⁽¹²⁾

Extracurricular Activities

Extracurricular activities are an integral part of the curriculum and complement the academic program. They aim to provide students with an applied dimension that refines their cultural and artistic skills while allowing them to explore and develop their creative capabilities. In 2022, there was a noticeable increase in new cultural and artistic extracurricular activities across all stages of public education (Table 1). One of the most notable activities was a competition focused on researching Saudi intangible cultural heritage (ICH), which has recently gained more attention. In this competition, students from

different provinces competed by conducting desk research on a particular field of Saudi ICH. The best research was then developed through expeditions and fieldwork, with valuable prizes awarded to the winners.⁽¹³⁾ The competition involved 3,465 students from different stages of public education.⁽¹⁴⁾ In the same vein, the Heritage Commission has launched a new initiative called "Little Explorer" to raise students' awareness about the significance of archaeological excavations by allowing them to participate in such activities. This initiative emphasizes the practical aspect of promoting awareness about heritage and antiquities.⁽¹⁵⁾ The Visual Arts Commission organized a virtual competition for students to showcase their skills in drawing, sculpture, and photography.⁽¹⁶⁾ The competition involved 3,847 students.⁽¹⁷⁾ The cultural commissions have recently launched two virtual programs through the "Madrasati" (My School) Platform to provide art education to public school students. One of the programs is "Musical Culture," which aims to teach students about music, notable compositions, and popular music genres in Saudi Arabia. The other program, "Reflections on Saudi and International Art," introduces students to significant works of art from both Saudi Arabia and global civilizations throughout history.⁽¹⁸⁾

Moreover, the MoC provided 100 public and international schools with more than 8,000 musical instruments to support extracurricular activities. This initiative aims to strengthen culture and art in public education by offering promising extracurricular programs. As part of its efforts, the MoC also launched the Year of Saudi Coffee, along with several extracurricular activities at different levels of public education, to celebrate World Heritage Day.⁽¹⁹⁾

Table 1: Examples of Extracurricular Cultural and Art Activities in Public Education

Activity	Description
Intangible Cultural Heritage Initiative	A student competition to write research on Saudi ICH
Little Explorer Initiative	Raising awareness of the significance of archaeological excavation
Musical Culture	Introducing students to music, notable compositions, and popular music genres in Saudi Arabia
Reflections on Saudi and International Art	Highlighting the most important artworks from Saudi Arabia and global civilizations over the centuries
Culture and Art for Disabled Students	Developing extracurricular culture and art programs in music, theater, and performing arts specifically for disabled students
Artists of Tomorrow	Virtual student competition for presenting works of drawing, sculpture, or photography

Culture and Art in Higher Education

Higher education constitutes a crucial phase in transferring specialized knowledge from theoretical knowledge to application. It is even more important because it trains and produces creative and innovative graduates and connects them with the labor market. This is particularly essential in the culture and art fields that require high-quality professionals in all cultural sectors, especially emerging ones.⁽²⁰⁾ In the 2021 Report on the State of Culture, a preliminary analysis

of the available academic culture and art programs at local universities was conducted. The report established a baseline for these programs and identified several universities that have recently introduced new academic programs to meet the increasing demand for cultural and artistic majors.

In the context of the response shown by the Saudi universities, as mentioned in the 2021 Report, the Imam Muhammad bin Saud Islamic University's College of Media and Communication announced its plan to introduce a bachelor's degree program in cinema and theater for female students. This program is expected to begin in the 2023 academic year.⁽²¹⁾ The cultural scholarship program has opened up new opportunities for students to pursue majors in cultural and artistic fields. The first batch of students who enrolled in the program this year have graduated, and as a result, scholarship programs in the cultural field have been enhanced. Additionally, the AIUla Scholarship Program has launched its third phase.⁽²²⁾

This section expands on the information presented in the 2021 Report by providing detailed insights into the graduates of academic programs related to culture and art. The data used in this report pertain to students who completed their studies in 2021. The aim is to offer a comprehensive understanding of these programs and the individuals who pursue them in higher education institutions annually.

Local Higher Education Institutions

The annual statistics of graduates from higher education institutions who pursued culture-related majors⁽²³⁾ provide valuable insights into the number of qualified candidates available in the job market. In 2021, a total of 38,156 graduates majored in cultural subjects, coming from different stages of higher education.



A general overview of the numbers to understand the distribution of graduates among cultural majors and the aspects of this distribution shows that 70% of all graduates with a culture-focused major were female. Additionally, when it comes to sectors, 68% of all culture-focused majors were in language and literature.⁽²⁴⁾ According to last year's report, the high number of programs offered in these majors may account for this.⁽²⁵⁾ This is compared to only 32% for the rest of the cultural sectors combined, with the exception of those of music and museum, with no graduates at all (Figure 2). Upon reviewing the distribution of culture-focused majors across different sectors, specific patterns became more apparent. Specifically, graduates who majored in English or Arabic language and literature represented a significant proportion (63%) of the total graduates in the language

and literature subjects, which include language education, translation, literature, grammar, rhetoric, linguistic studies, and related pedagogical disciplines. Similarly, the architecture and design sector had a high concentration of graduates (87%) in three disciplines, namely interior design (34%), architecture (32%), and graphic design (21%). This trend was also observed in history, where 1,902 students, including those who majored in heritage, made up 70% of the graduates in this sector, which includes archaeology, heritage resource management, and other majors. However, majors in new sectors, such as film and theater, or those undergoing a change in teaching methods at local higher education institutions, such as drawing and art, showed a decrease in the number of male graduates when compared to the art education major.

Table 2: Graduates in Cultural Majors by Gender in a Sample of Cultural Sectors

Major	Sector	Females	Males	Total
English Language (General)	Language and Literature	6,025	2,236	8,261
Arabic Language and Literature	Language and Literature	6,016	2,036	8,052
English Language and Translation	Language and Literature	2,472	711	3,183
History	Heritage	1,291	611	1,902
Nutrition and Food Science	Culinary Arts	996	189	1,185
English Language and Literature	Language and Literature	799	182	981
Literature, Criticism, and Rhetoric	Language and Literature	623	324	947
Library and Information Science	Libraries	604	270	874
Interior Design	Architecture and Design Arts	764	46	810
Architecture	Architecture and Design Arts	265	375	640
Fashion and Textile Design	Fashion	518	-	518
Graphic Design and Digital Media	Architecture and Design Arts	448	65	513
Art Education	Visual Arts	239	115	354
Drawing and Arts	Visual Arts	315	42	357
Architectural Engineering	Architecture and Design Arts	-	109	109
Cinema and Theater	Film and Theater	33	28	61
Architectural Engineering Technology	Architecture and Design Arts	-	15	15

Knowledge and Skills

In most culture-focused majors, the number of female graduates was higher than that of male graduates. However, in the film and theater sectors, male students represented 77.48% and in the event management sector, they accounted for 54% of all students (Figure 2). On the other hand, in the fashion sector, 100% of the graduates

were female, with a total absence of males. In architecture, the majority were males at 65%, but in interior design and graphic design, the percentage of female graduates was 94% and 87%, respectively. This indicates a significant presence of females in the architecture and design sector in general (Table 2).

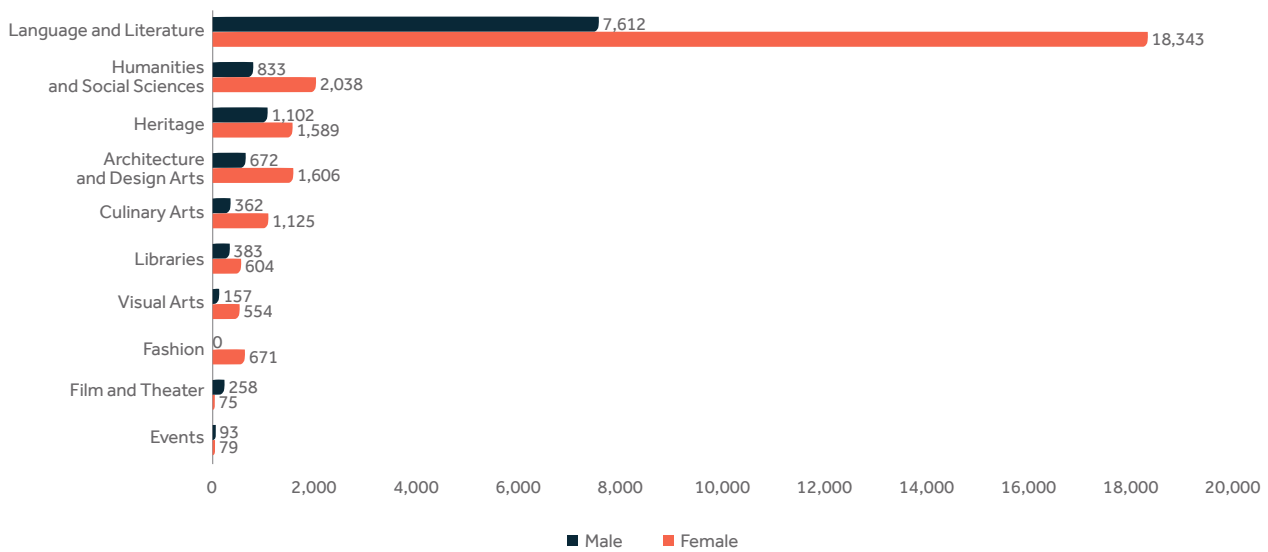


Figure 2: Number of Graduates in Cultural Majors by Gender

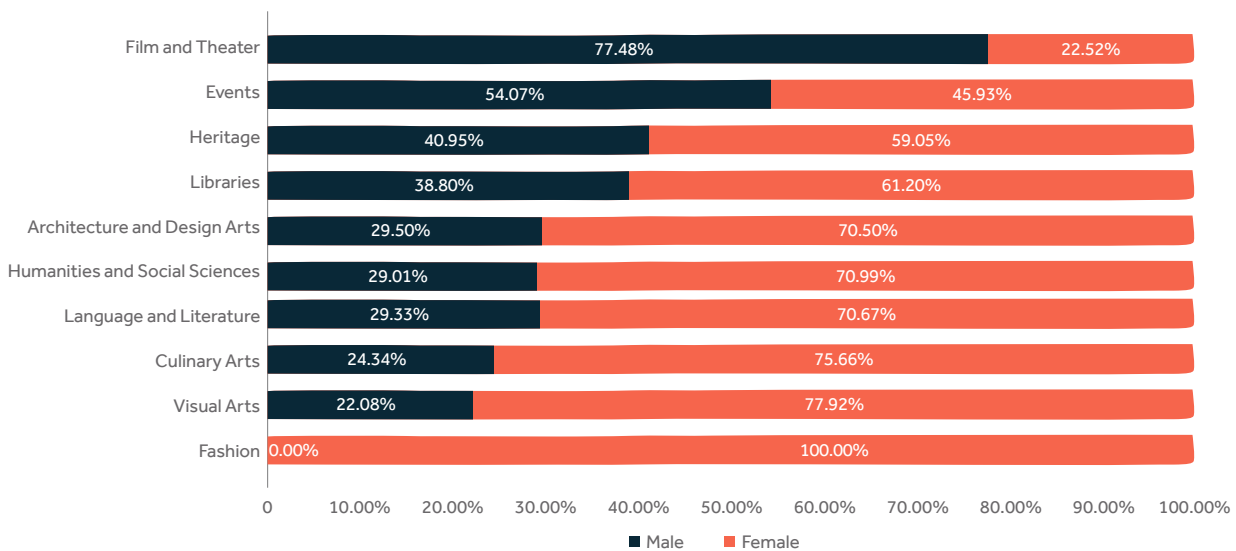


Figure 3: Relative Proportion of Graduates in Cultural Majors by Gender

The number of graduates from cultural majors in each province can help us understand their distribution across the country. Figure 4 provides a visual representation of the provinces based on the number of graduates in cultural majors relative to their population size. Around 66% of

cultural graduates are concentrated in just four provinces - Riyadh, Makkah, Madinah, and the Eastern - and the remaining provinces account for the remaining 34%. However, when we consider the population of each province, the concentration disappears. This results in a higher proportion of graduates



from cultural majors in provinces with smaller populations, such as Al-Baha, Hail, Madinah, and Al-Qassim, where the number of graduates per 10,000 people is 34 or higher. As far as diversity in majors, Figure 5 shows a direct relationship between the number of graduates in a province and the variety of culture-focused majors they have completed. Provinces with higher numbers of graduates have a more

comprehensive range of culture-focused majors among their students. However, this variety dissolves when the number of graduates in a province decreases. For instance, culture-focused majors in Al-Jouf are limited to language and literature. Graduates with language and literature majors also made up 99% of the graduates in Najran, as well as 82% in the Northern Borders.

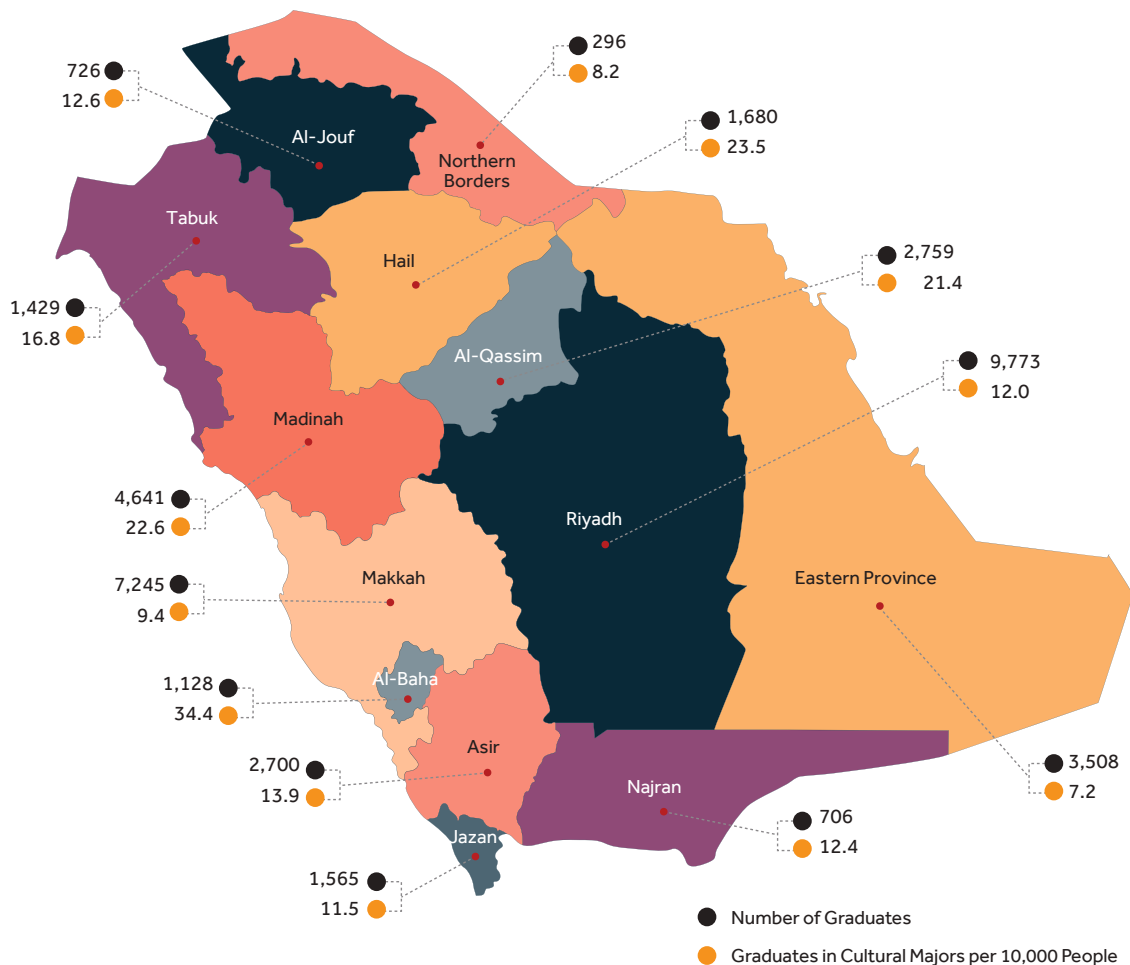


Figure 4: Number of Graduates in Cultural Majors per 10,000 People by Province

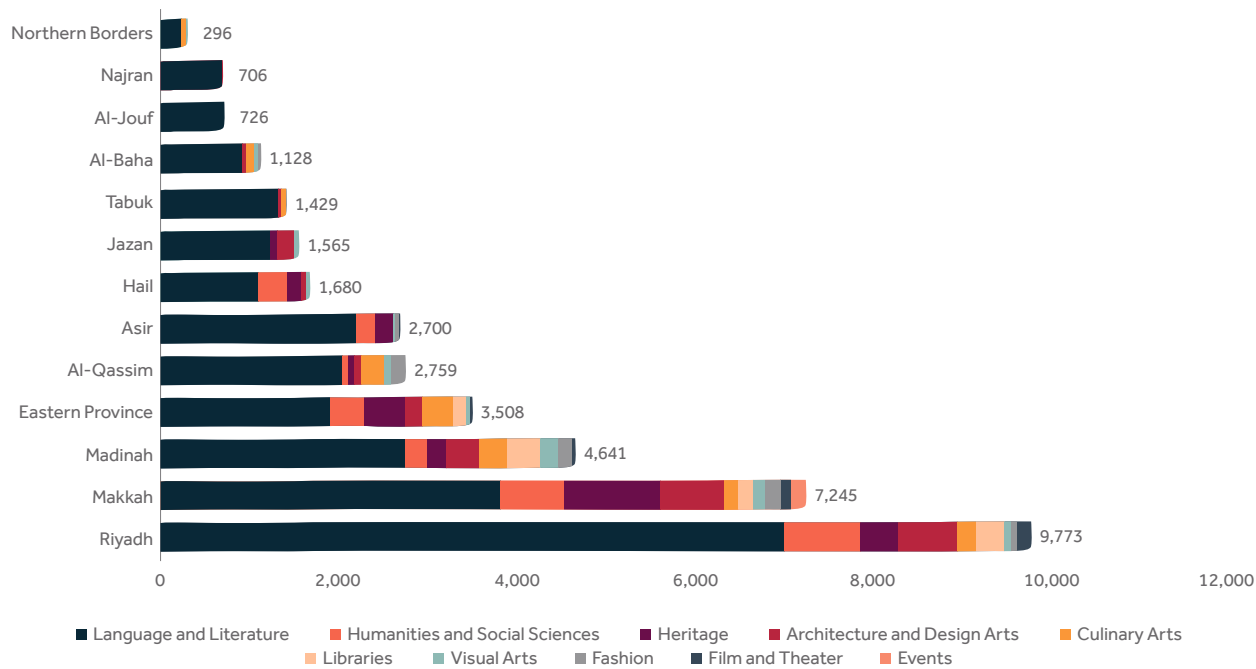


Figure 5: Number of Graduates in Cultural Majors by Province



The picture becomes more evident once we take a closer look at the situation regarding graduates in cultural majors but excluding language and literature. Figures 6 and 7 demonstrate this result. Figure 6 rearranges the order of provinces based on the number of graduates in cultural majors after excluding those who studied language and literature, ranking Makkah first. Figure 7 provides a more detailed distribution of graduates in each of these majors. All events management graduates were from Makkah. For film and theater, almost half (49.55%) of the graduates were from Riyadh. While Makkah had 40% of graduates in the heritage

sector, most of whom majored in history. Notably, Madinah had a higher number of library graduates (36.58%) than the other four provinces combined, while the Eastern and Madinah Provinces shared approximately half (45%) of the culinary arts graduates.

When we consider the population of each province, Madinah has the highest number of graduates in cultural majors (excluding language and literature), with nine graduates per 10,000 people. Hail, Al-Baha, and Al-Qassim follow. This indicates that culture majors are more represented in smaller provinces compared to those with larger cities (Figure 8).

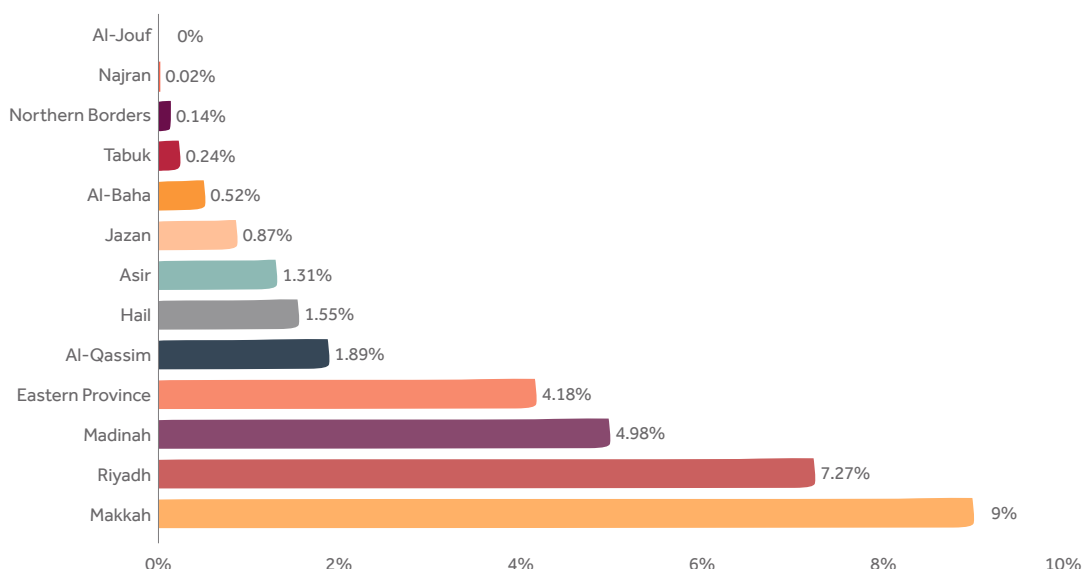


Figure 6: Percentage of Graduates in Cultural Majors, excluding Language and Literature, by Province

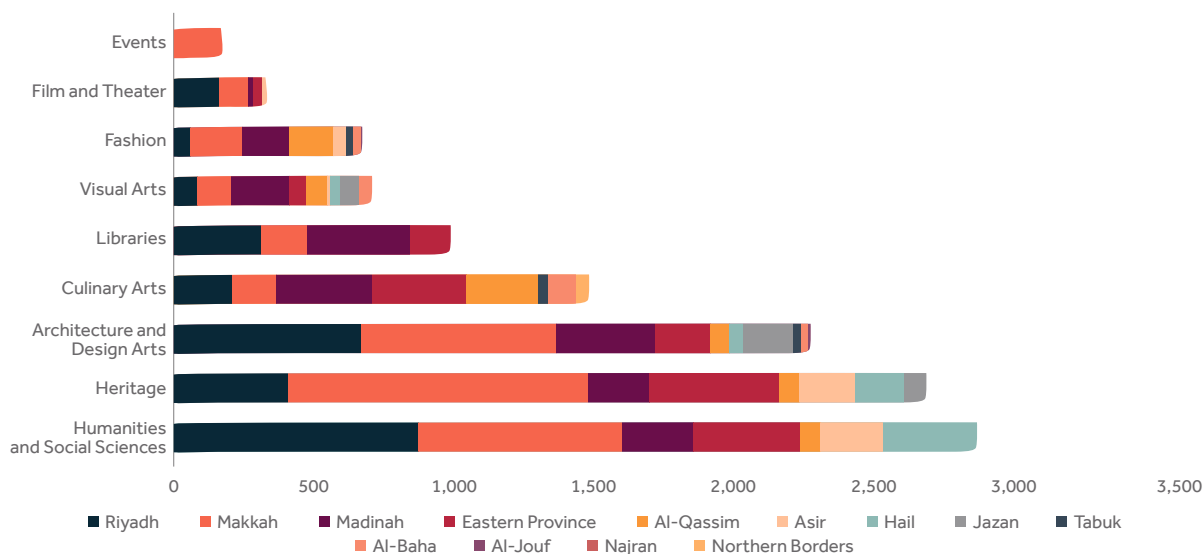


Figure 7: Distribution of Graduates in Cultural Majors, excluding Language and Literature, by Province

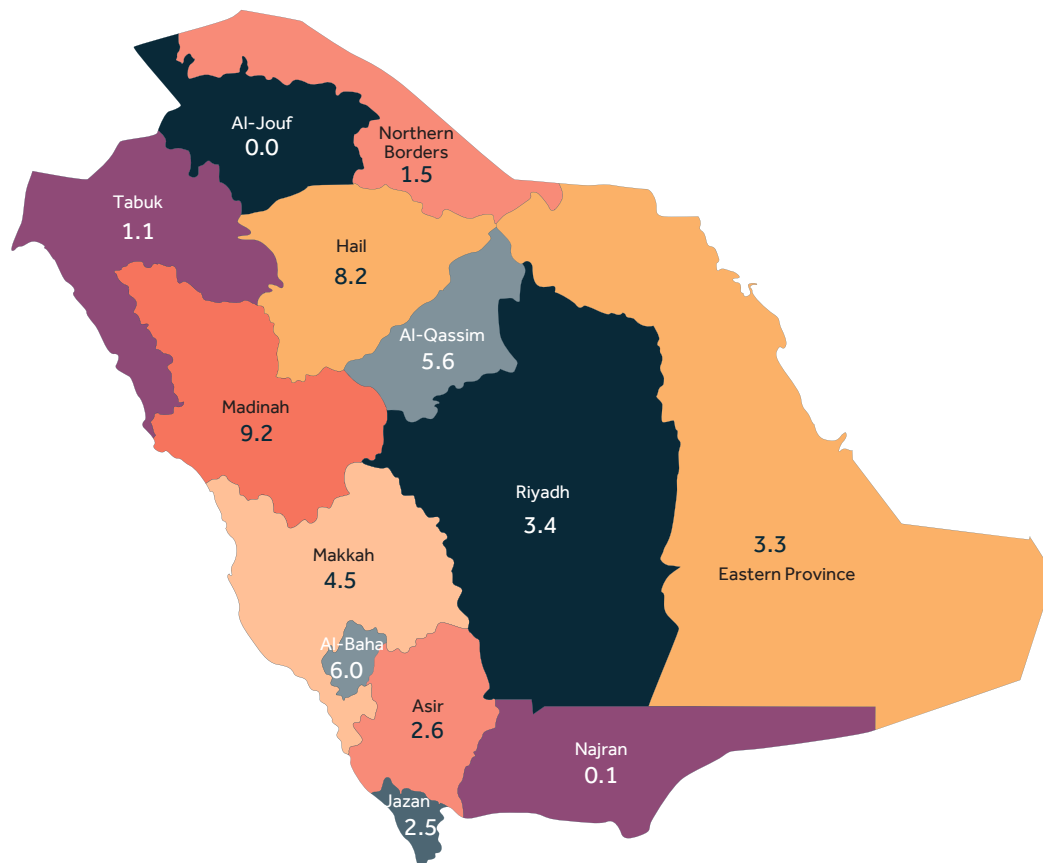


Figure 8: Number of Graduates in Cultural Majors, excluding Language and Literature, per 10,000 People by Province

The figures reveal that 98% of graduates in cultural majors graduated from public higher education institutions, while only 2% from private institutions (Figure 9). Among these graduates, 88% were female. Further analysis of the culture-focused majors of students from private higher education institutions reveals that most of them studied architecture

and design, followed by language and literature, fashion, film, and theater (Figure 10). Most of these graduates were female, which is consistent with the trend observed in the 2021 Report regarding the number of academic programs offered to male and female students by private higher education institutions.⁽²⁶⁾



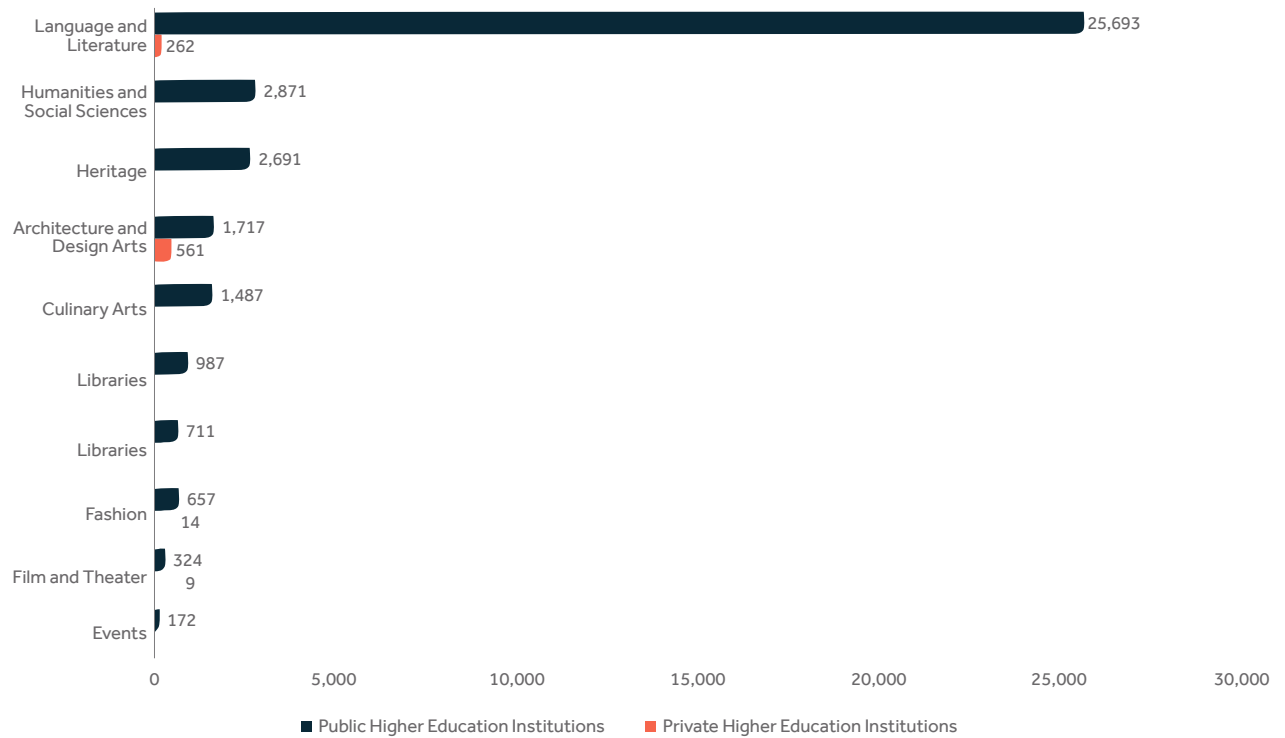


Figure 9: Number of Graduates in Cultural Majors by Type of Educational Institution

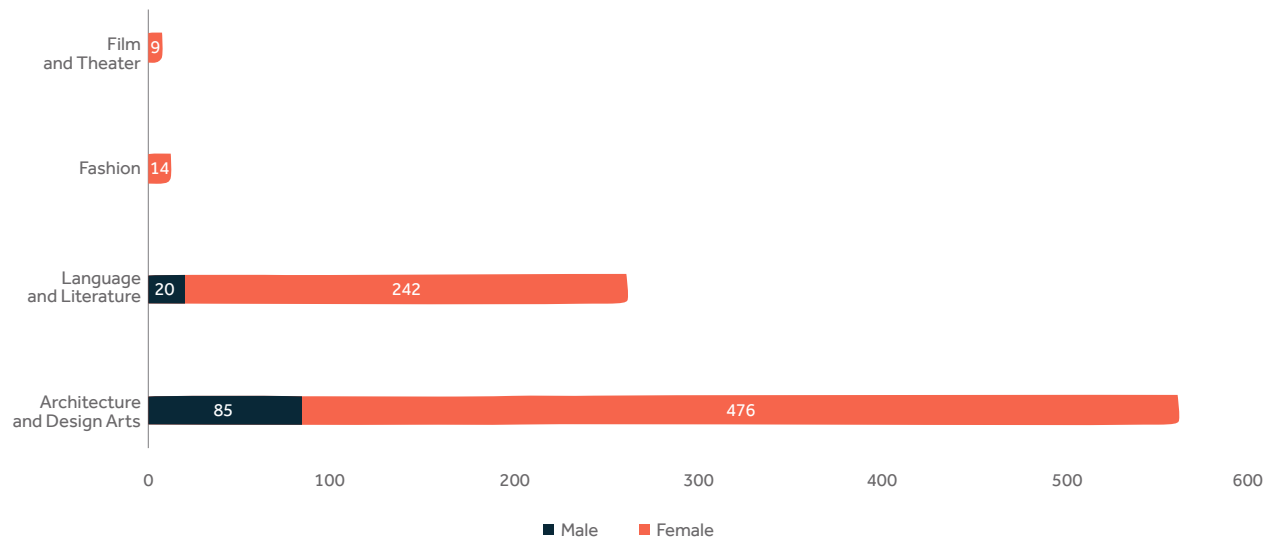


Figure 10: Number of Graduates in Cultural Majors from Private Higher Education Institutions by Gender

Naturally, most graduates who have pursued culture majors hold a bachelor's degree, while only 4.5% of graduates have completed postgraduate courses, with most of them holding a master's degree (Figure 11). Many of these postgraduates were enrolled in theater studies, a newly launched program at King Abdulaziz University in Jeddah. For doctoral graduates,

the data indicate an increased number of graduates from theoretical majors, such as language and literature, with a total of 225 graduates, as well as sociology and history (Figure 12). This increase can be attributed to these majors being well-established for a long time, as well as the amount of supervision provided at the higher education level.

Knowledge and Skills

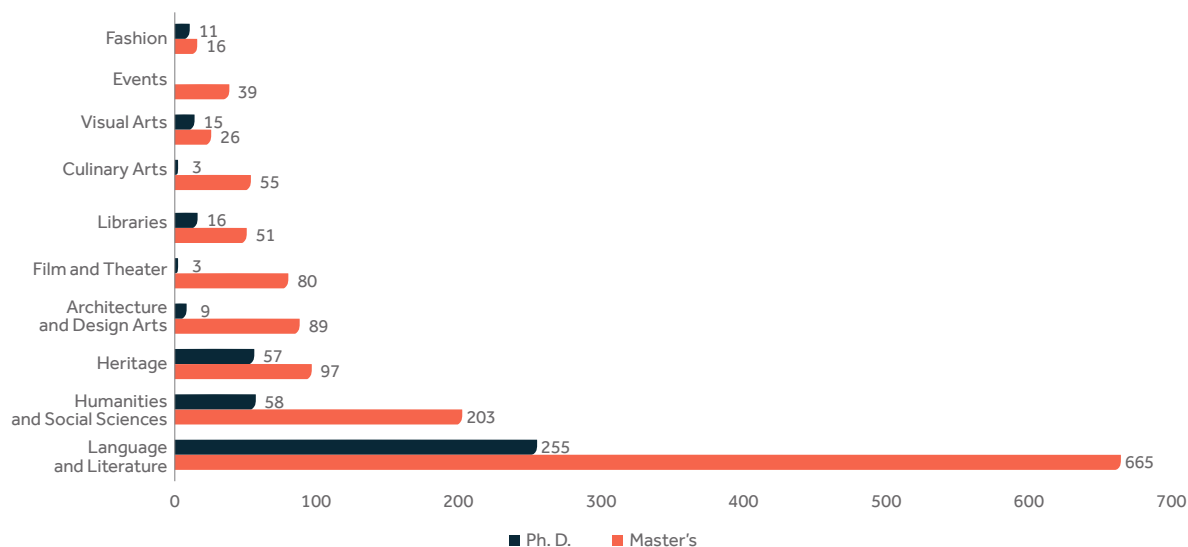


Figure 11: Total Number of Graduates in Cultural Majors from Postgraduate Programs by Degree

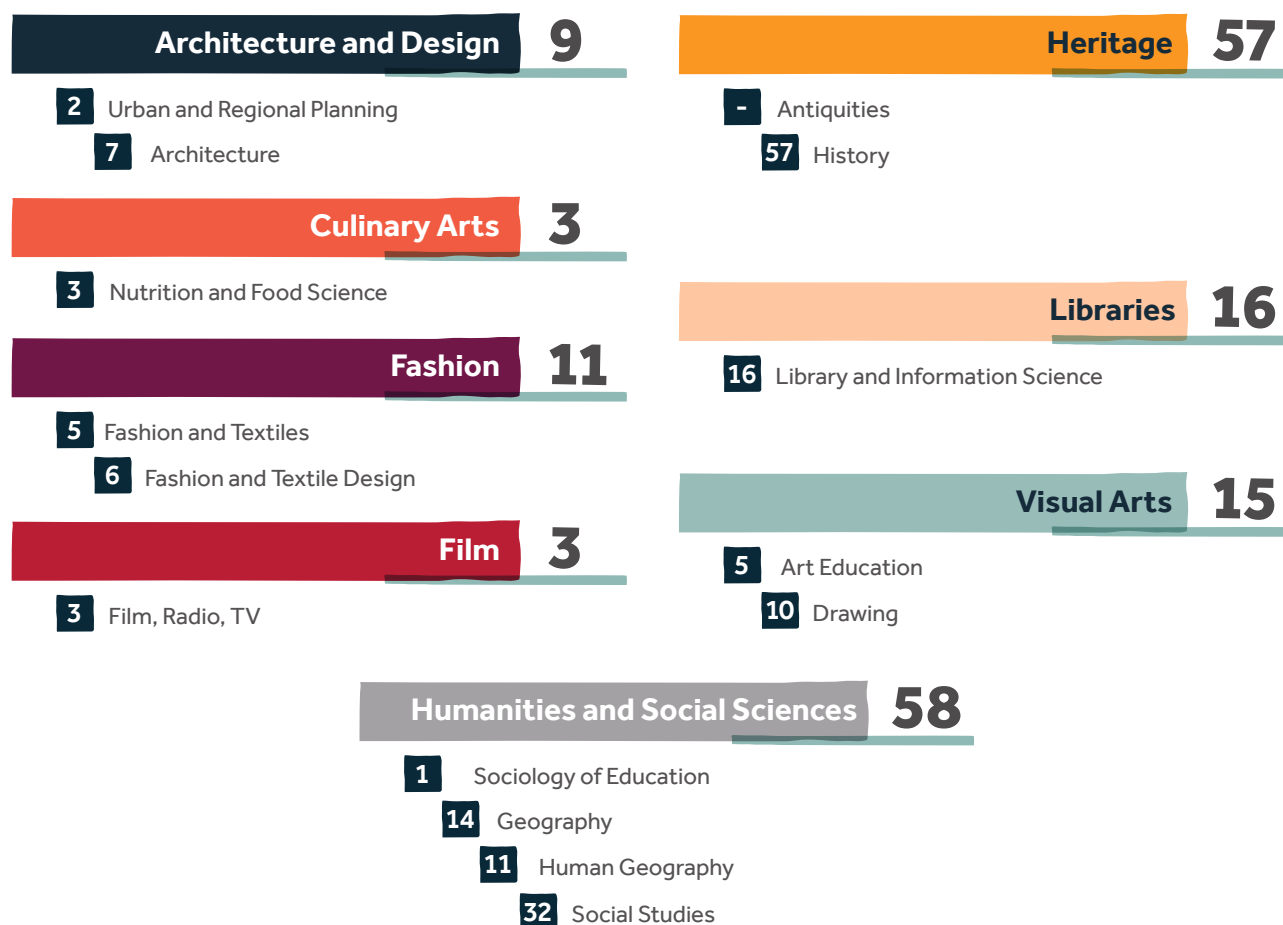


Figure 12: Total Number of Graduates in Cultural Majors from Ph.D. Programs, excluding Language and Literature

Scholarship Programs in Culture and Art Majors

The Custodian of The Two Holy Mosques Scholarship Program is the oldest program for those seeking opportunities to study various majors and degrees abroad that may not be available in higher education institutions in Saudi Arabia. In contrast, other programs, such as the Cultural Scholarship Program and the AIUla Scholarship Program, are more specialized and recent. These programs reflect the growing interest in studying cultural majors in Saudi Arabia. This section presents a concise analysis of the statistics related to these scholarship programs based on 2022 data.

In 2022, a total of 473 students graduated from the Custodian of the Two Holy Mosques Scholarship Program.⁽²⁷⁾ Out of this group, 65% were female students, while 35%

were male from different cultural majors (Figure 13). The trend of most female students majoring in cultural subjects continued. However, the distribution of graduates in cultural majors abroad differed from the distribution in local higher education institutions, which is consistent with what was observed in last year's report. The report indicated that foreign scholarship programs and programs offered by local higher education institutions complement each other in terms of the majors available to study. Architecture and design majors had the highest number of graduates, with a clear difference in favor of female students. At the same time, language and literature fell to fourth rank, and the number of male and female graduates from film and theater were almost equal (Figure 13).

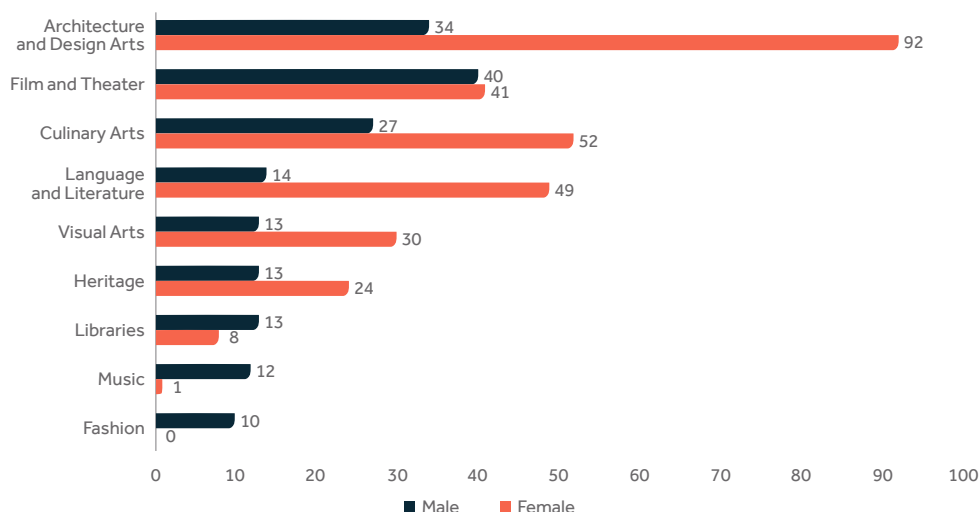


Figure 13: Number of Graduates in Cultural Majors from the Custodian of The Two Holy Mosques Scholarship Program by Gender, 2022

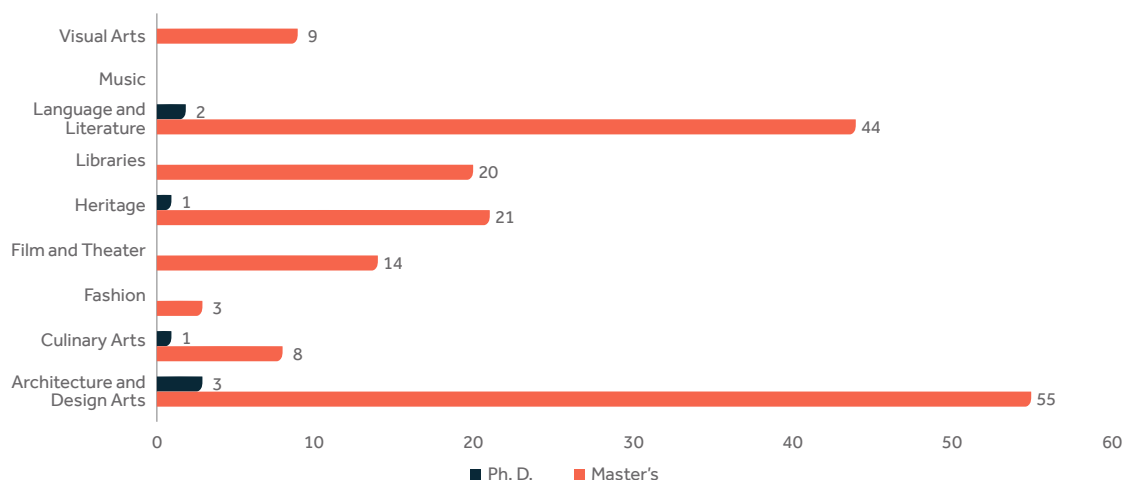


Figure 14: Number of Postgraduates in Cultural Majors from the Custodian of The Two Holy Mosques Scholarship Program by Degree, 2022

Table 3: Distribution of Graduates from a Sample of Cultural Majors in the Custodian of The Two Holy Mosques Scholarship Program by Gender, 2022

Major	Male	Female	Total
Architecture and Design	34	92	126
Architecture	19	30	49
Graphic Design and Digital Media	5	18	23
Interior Design	1	20	21
Product Design	4	11	15
Film and Theater	40	41	81
Film, Radio, TV	19	32	51
Cinema and Theater	21	9	30
Music	12	1	13
Music	11	1	12
Music Production	1	-	1

In the second year of the Cultural Scholarship Program, which the MoC initiated to produce qualified professionals for the sector, the first batch of students has started graduating, with a total of 28 graduates in 2022. Out of these graduates, 21 were female. The program continues to provide scholarships to 727 students who are pursuing their majors in culture and art.⁽²⁸⁾ The AIUla Scholarship Program is another scholarship

program that offers opportunities for students majoring in culture studies. It was launched by the Royal Commission for AIUla in 2018 and entered its third stage in February 2022, sending 279 students to study abroad. The program is open to students in various sectors, such as archaeology, museums, environmental science, agriculture, and any sector that contributes to the scientific and tourism needs of AIUla.⁽²⁹⁾



Art and Cultural Training in the Kingdom

Culture and art training is unique in its ability to transfer and nurture culture and art skills due to its flexibility and ability to be presented in various forms, unlike formal education. Therefore, training plays a complementary role in transferring cultural knowledge and skills, especially those that rely heavily on application and practice. This section of the report presents the developments in cultural and art training throughout the year, beginning with the development of training licenses via the Abde'a Platform. The number of registered institutions has seen a significant increase this year, and the transformations witnessed by civil and private institutions active in this sector are also presented. This section also seeks to provide an overview of the current state of trainees in different cultural sectors, including training institutes and organizations, by reviewing their number and the features of their demographic distribution. The report also covers qualitative developments in these fields and the forms of cultural and art training offered within the private sector, civil institutions, and cultural commissions. Finally, the report provides a preliminary exploration of these organizations' use of opportunities for virtual training and the relevant challenges.

Regulatory Developments in the Cultural Training Sector

Developing suitable regulatory and organizational frameworks contributes to the prosperity of cultural and art training by facilitating the issuance of training licenses to institutions and improving the ability to monitor the quality of the training offered. The 2021 Report referenced a collaborative mechanism between the MoC and the Technical and Vocational Training Corporation (TVTC) to regulate licensing training institutes and programs via the Abde'a Platform. In 2022, the platform added licensing services for training and higher training institutes, which offer more extended training programs that last for more than four weeks. The Platform also provides an opportunity for training organizations whose licenses were issued by the TVTC before the Platform was established to authenticate their licenses. When comparing data from the Abde'a Platform in 2021 and 2022, there is a marked increase in the number of licenses issued, which is the goal set by those running the Platform through creating a unified system. It has helped to overcome the challenges faced by individuals and organizations when attempting to gain a license to practice cultural activities or



training. Since the addition of this licensing service in mid-2021, the Platform has issued licenses to 25 training facilities, as well as three approvals for training programs.⁽³⁰⁾ These figures increased in 2022, as the Abde'a Platform issued 50 licenses for training facilities and approved 51 training programs (Figure 15).⁽³¹⁾



Figure 15: Cumulative Number of Licenses and Approvals for Cultural Training Facilities and Programs issued via Abde'a Platform, 2021-2022

Table 4: Examples of Training Programs Approved via Abde`a Platform, 2022

Training program
International Dining Etiquette and Protocol for Professional Women
Associate Diploma in Food and Beverage Service
Associate Diploma in Culinary Arts
Pâtisserie and Confectionery
Music Diploma
Learn to Play the Oud
Learn to Play the Qanun
Music Course for Children
Modern Literary Criticism
Philosophy of Education
Philosophy for Children, for Early Years Practitioners
Sculpture and Ceramics
Pencil, Charcoal, and Pastel Art
Acting Courses

Civil and Private Training Entities

During the year, various civil and private institutions, academies, and establishments have made efforts to provide cultural and art training at a more professional and specialized level. Some governmental commissions and organizations have supported these efforts. The Misk Art Institute has collaborated with Sotheby's Institute of Art to offer courses that focus on contemporary issues in the field of art training. These courses covered essential topics, such as Business in Arab Art, Key Components of NGOs in Contemporary Art, Writing on Art, and Market Economics and their Impact on Art.⁽³²⁾ The Kingdoms Institute, affiliated with the Royal Commission for AlUla, presented an international fellowship program in archaeological conservation.⁽³³⁾ It is an advanced program for discovering and protecting antiquities. Such efforts indicate an increasing growth in specialized training for practitioners in the cultural sector.

On the other hand, the increasing presence of civil and private institutions in cultural and art training has resulted in a significant impact on the development and transformation of the forms of cultural training in recent years. These institutions have been instrumental in offering non-traditional forms of cultural and art training by integrating training into their cultural and art projects. Being organizations that consistently produce culture and art, they are better equipped to respond to the needs of the market. They also collaborate with external partners to build joint programs, invoking different experiences compared to those within local training circles. One such example is the Art Residency Program offered by the Misk Art Institute, which ranges from one to three months. Participants are given time, space, and resources to shape ideas, exchange experiences, and focus on creative work in a favorable atmosphere. Some of these programs also provide basic training for participants. For example, the Misk Art Foundation offers an artistic residency program in the field of visual arts, which lasts from one to three months and focuses on supporting participants in developing their artistic works and projects by saving the cost of production, providing the appropriate place and time to stimulate inspiration and creativity, and also by providing specialized training courses, workshops, and lectures in the field of residency, developing participants' communication with each other and with other artists, and finally helping them promote their work. This residency is offered to different levels of artists, from amateurs to professionals, who are required to have several years of experience in the residency field.⁽³⁴⁾

The King Abdulaziz Center for World Culture, also known as Ithra, provides a rich training forum as part of its annual reading competition, known as iRead, which selects the "Reader of the Year" after several stages. The most important is the "iRead Enrichment Forum", which takes place over several months and aims to develop the participants' reading, research, and writing skills through various training programs. These programs include providing a platform for a group of writers, authors, and intellectuals from the Arab world.⁽³⁵⁾

MBC Academy's "Workplace Training" Program is one of the most crucial applied training programs mentioned in the 2021 Report. This program offers trainees an opportunity to work on one of their TV programs, films, radio shows, or the Shahid streaming platform, enabling them to hone their skills, gain expertise, and build networks through daily work on one of these projects. These projects last for at least a month and cover various fields, including acting, directing, shooting, décor and light design, screenwriting, journalism, presenting, and reading news bulletins. Some of these programs run outside Saudi Arabia, providing trainees with a more significant opportunity to hone their skills and benefit from global experiences that may not be available locally.⁽³⁶⁾

Cultural Training in TVTC-Supervised Establishments and Institutions

The statistics regarding trainees within the TVTC-supervised establishments and institutions depict the current state of cultural training in the sector. These entities work with other educational and training institutions to provide cultural industries with skilled and qualified workers trained in the applied aspects of gaining knowledge and skills for cultural and art fields. This is particularly important for professions that require specialized training in these fields.

As mentioned in last year's Report, the TVTC classifies training programs into four categories in terms of duration. The most extended program is a training diploma, which can last up to three years. On the other hand, the development course is the shortest program, with a duration that is one month at maximum, with no more than 60 training hours.⁽³⁷⁾ It is worth noting the training that graduates receive from bachelor's degree programs at technical colleges, which is presented in this section. Like higher education data, these figures show the number of individuals who completed their training in 2021 and serve as a baseline for measuring growth in the cultural training sector in the future.

In 2021, there were 18,760 cultural trainees. Most of them (69%) were enrolled in development programs, followed by 26% in diploma training programs (Figure 13). Qualification courses and programs only accounted for 3% of the trainees,



all of whom were in culinary arts. Bachelor's programs at technical colleges made up just 2% of the trainees and were only found in the architecture and design sector in construction management and engineering.

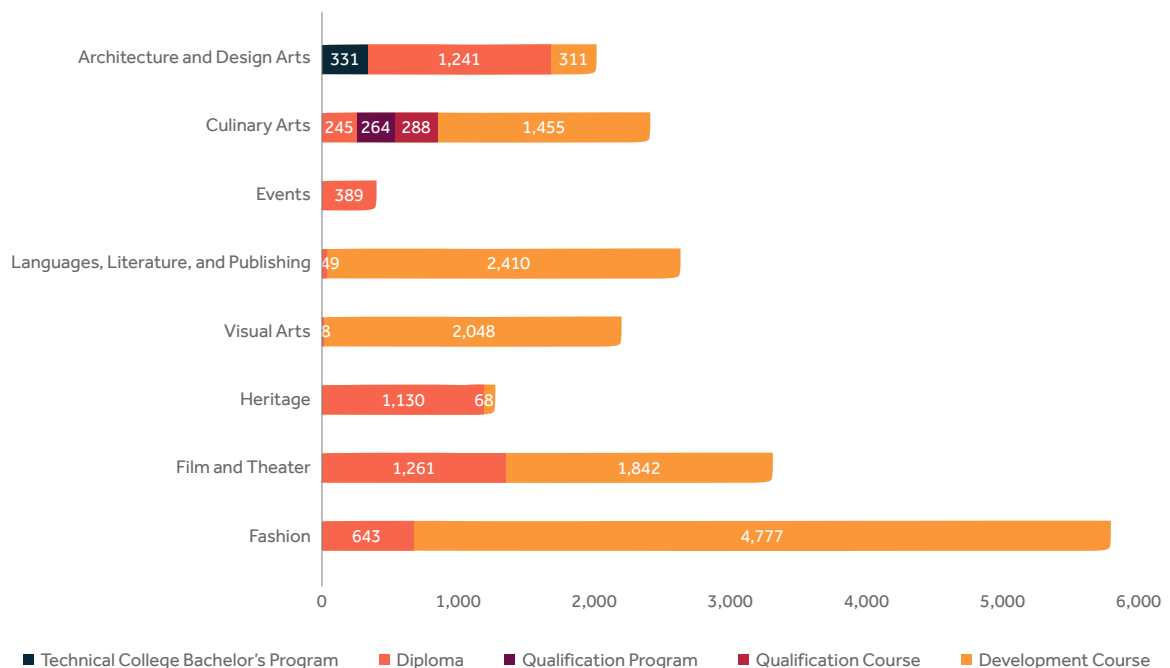


Figure 16: Number of Trainees in Cultural Sectors at TVTC-Supervised Establishments and Institutions

Table 5: Number of Trainees in Development and Diploma Training Courses in a Sample of Cultural Fields at TVTC-Supervised Establishments and Institutions

Cultural Sectors and Training Fields	Development Course	Diploma
Fashion	4,777	643
Tailoring and Dressmaking	1,030	214
Fashion and Textile Design	3,747	429
Film and Theater	1,842	1,261
Beauty and Cosmetics	-	1,240
Film Production	1,245	-
Languages, Literature, and Publishing	2,410	49
Literature and Rhetoric	80	-
Printing	402	49
Professional Linguistics	35	-
Publishing	1,893	-
Culinary Arts	1,455	245
Professional Hotel Management	-	149
Food Production (Cooking)	1,426	21
Visual Arts	2,048	8
Artworks	2,048	8
Architecture and Design	311	1,241
Professional Graphic Design	-	51
Professional Interior Design	175	-
Architectural Design	-	4
Multimedia Design	136	807
Heritage	68	1,130
Handicrafts (Handmade Cultural Industries)	68	-
General Carpentry	-	495
Events	-	389
Event Management	-	389

Table 5 illustrates the distribution of trainees and available training fields in cultural sectors. It is observed that fields and sectors that primarily entail the acquisition of cultural and artistic skills, such as fashion, film, theater, culinary arts, and visual arts, are prominent. This distribution contrasts with the distribution of cultural majors in higher education institutions. This finding aligns with the observations made in last year's report on the cultural training data. In 2021, the fashion sector had the highest number of trainees in the cultural sectors, accounting for 29% of the total trainees. Most of these trainees were in fashion and textiles, and there was a complete absence of males in this sector, which was also observed in higher education institutions. In the film and theater sector, the highest number of trainees, amounting to 1,240, completed diploma programs in the beauty and cosmetics field. In the heritage sector, which primarily offers diploma programs for trainees, 495 students underwent training in general carpentry, and 634 trainees received training in professional tourism management. The culinary arts sector, which represents 12% of all trainees



in the cultural sectors, offered a wide range of qualification programs and courses, resulting in 552 qualified trainees, as indicated in Figure 17.

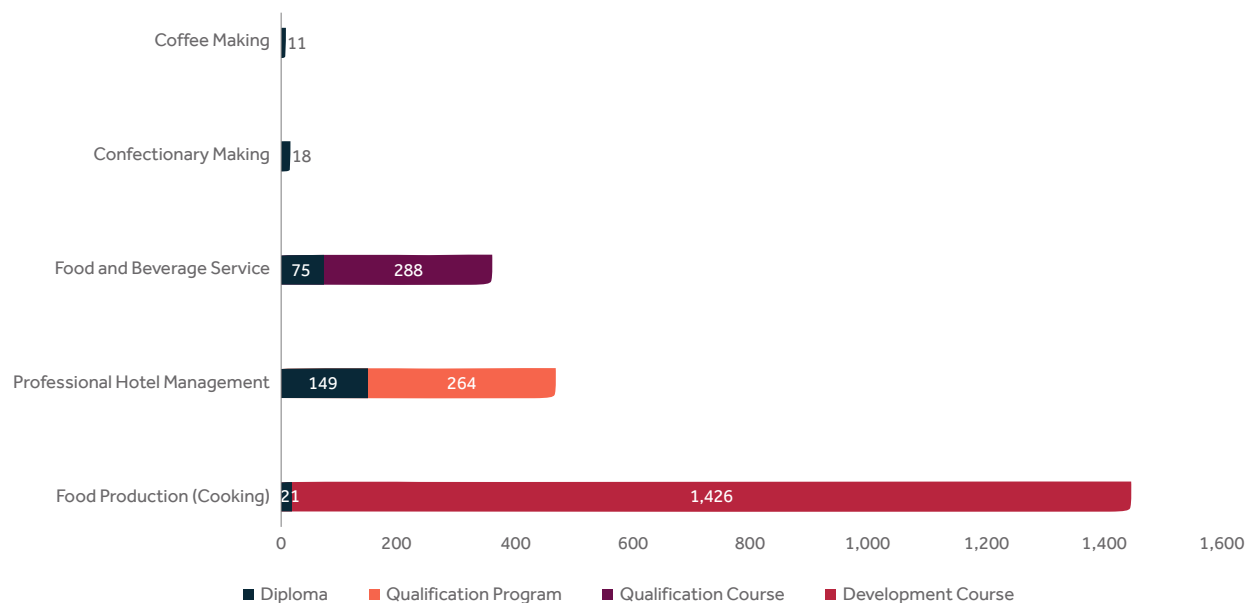


Figure 17: Number of Trainees in the Culinary Arts Sector by Type of Program

As for the demographics of trainees, the gender distribution of cultural trainees varies depending on the sector they are in. In general, 57% of trainees are female, while 42% are male. However, this is mainly because there are no male trainees in the fashion sector. If we exclude fashion, the percentage of male trainees rises to 60% of the total number of trainees in the cultural sectors, while female trainees account for 40%. For example, 88% of trainees in the culinary arts sector are male

(Table 6). In the architecture and design sector, the distribution of male and female trainees is pretty even, with women focusing on interior and graphic design and men focusing on architecture and construction, as is also observed in graduates from higher education institutions. In the heritage sector, male trainees make up 95% of the total number of trainees, while female trainees are more concentrated in handicrafts. In contrast, in the carpentry field, all 495 trainees were male.

Table 6: Distribution of Trainees in the Culinary Arts Sector by Gender

Cultural Sectors and Training Fields	Female	Male	Total
Culinary Arts	261	1,991	2,252
Hotel Management	240	173	413
Food Production (Cooking)	21	1,426	1,447
Food and Beverage Service	-	363	363
Confectionery Making	-	18	18
Coffee Making	-	11	11

The distribution of trainees by province shows that Makkah Province has the highest number of trainees, making up 38% of all cultural sector trainees in Saudi Arabia. This constitutes over a third of all trainees, followed by the Eastern Province and then Riyadh, and shows that there are plenty of training opportunities available in the province for cultural professions and qualification of relevant workforce. Despite being higher in population size, Riyadh has fewer trainees than Makkah. Figure 18 highlights this

point, as it shows that Makkah remains the province with the highest number of trainees even when compared to the population of the province. Some provinces, like Jazan and Tabuk, stand out for cultural training despite having a lower share of graduates from higher education institutions. This suggests there are sound educational and training opportunities available in these provinces, and not necessarily a higher interest in the cultural sectors from those living there.

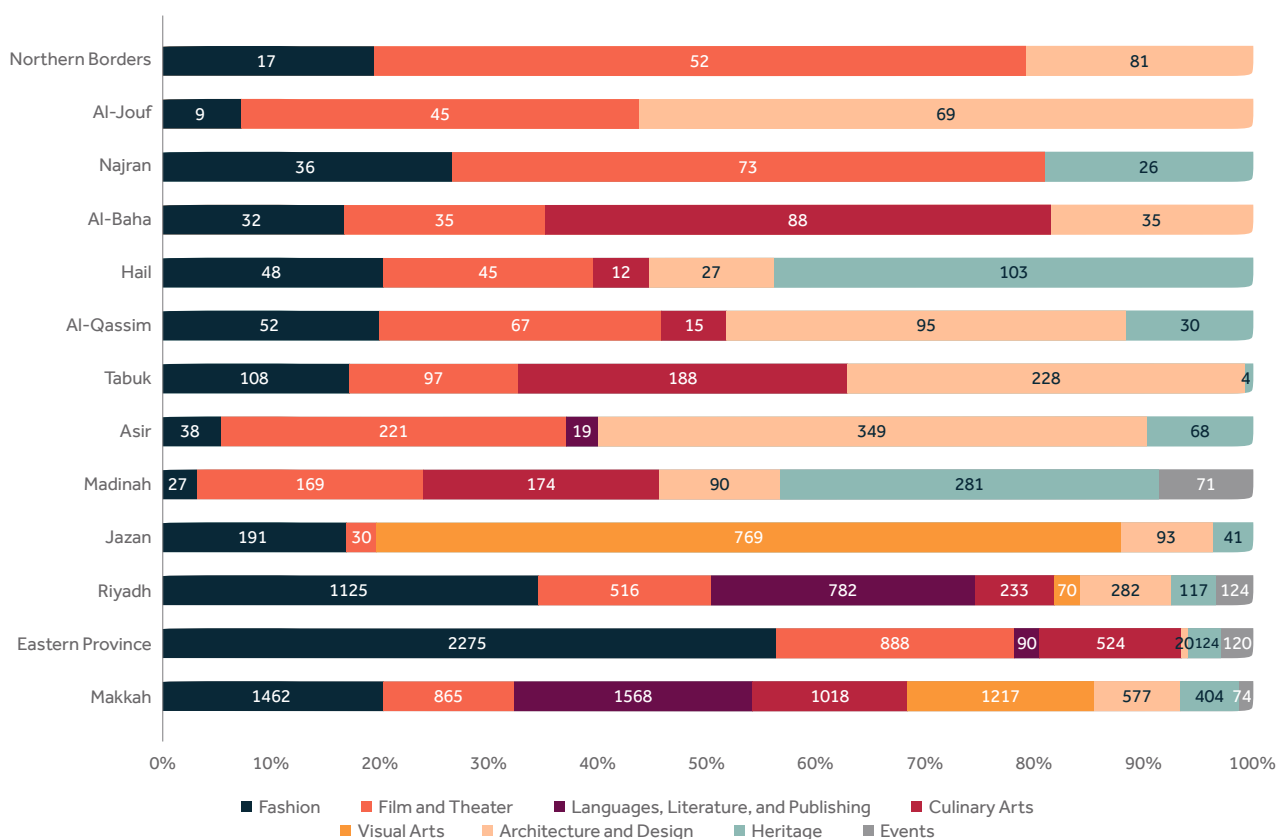


Figure 18: Number of Trainees in Cultural Sectors by Province

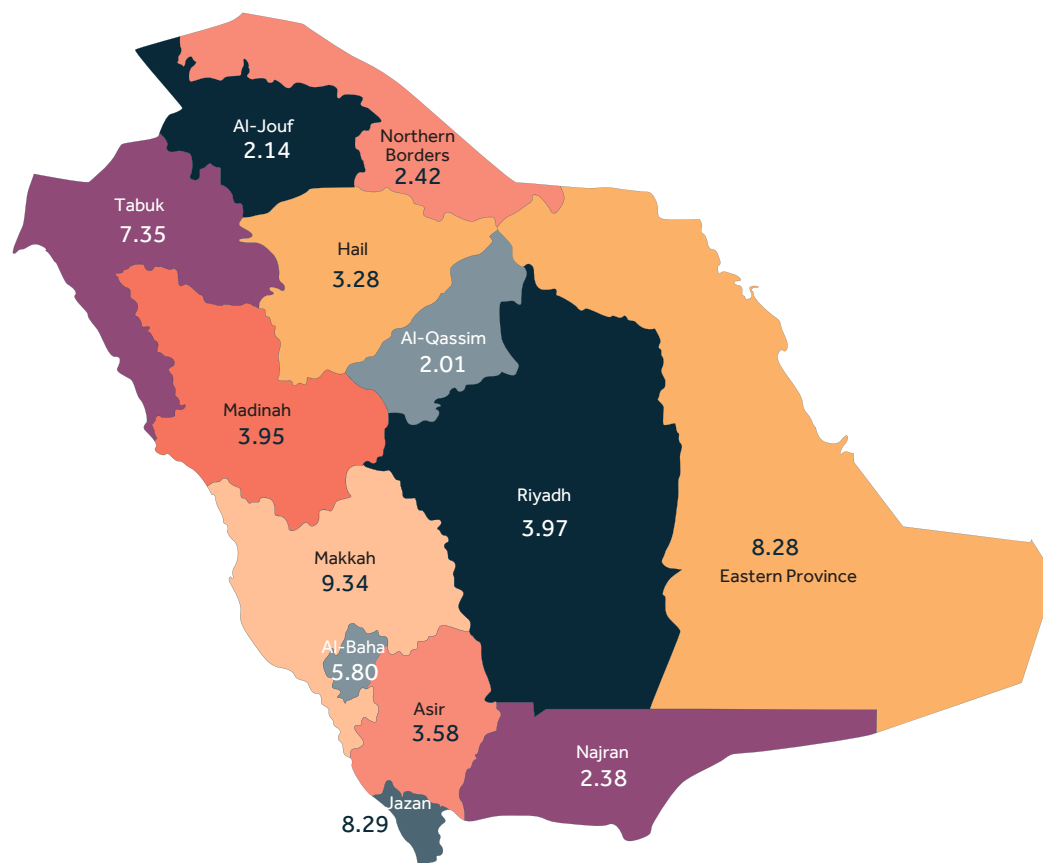


Figure 19: Number of Trainees in Cultural Sectors per 10,000 People by Province

When examining the distribution of cultural training across different sectors throughout the provinces, we find that some fields of cultural training are limited to one or a few provinces. For example, all theater production trainees, 500 in total, completed their development courses in Makkah Province, as was the case with all 11 coffee-making trainees, who also completed their training there. On the

other hand, all 18 trainees in confectionery production completed their training in Riyadh Province. In the film and theater sector, 68% of the trainees in film production completed their training in Riyadh Province. Out of the 68 trainees in handmade cultural industries, 63 completed their training in Riyadh Province, while only five trained in Al-Qassim Province.



Table 7: Number of Trainees in a Sample of Training Fields in Cultural Sectors by Province

Province	Al-Qassim	Hail	Asir	Madinah	Riyadh	Al-Baha	Tabuk	Eastern Province	Jazan	Makkah
Training Field										
Artworks					70				769	1,217
Literature and Rhetoric					17					63
Printing			19		342			90		
Professional Linguistics										35
Publishing					423					1,470
Event Management				71	124			120		74
Food Production (Cooking)	15	12			185	88	188	524		435
Food and Beverage Service				75						288
Professional Interior Design										175
Architectural Design					4					



Cultural Commissions and the State of Cultural and Art Training

Throughout the year, various cultural commissions have presented training programs to help practitioners and individuals working within cultural sectors develop and refine their skills. These programs have included intensive training sessions, as well as cultural incubators (Table 8). For example, the Culinary Arts Commission hosted a culinary arts cultural incubator, which offered a comprehensive program to support pioneers and entrepreneurs in the food and beverage industry. The program included a five-day-long boot camp during which some participants were eliminated from the process before a 24-week-long incubation stage.⁽³⁸⁾ An incubator was also presented by the Theater and Performing Arts Commission, which lasted for 4.5 months. During this time, a group of managers and experts conducted workshops for the trainees. Additionally, the Fashion Commission presented a five-month fashion incubator to support pioneers and practitioners in the field.⁽³⁹⁾ In partnership with a manga production company, the Literature, Publishing, and Translation Commission offered a training program that culminated in a scholarship-funded trip to Japan for the "Manga Industry."⁽⁴⁰⁾ In 2022, the Film Commission organized an intensive program

called “Filmmakers”. The program included a series of training courses led by specialists on various topics, such as creating movie characters, taking a movie from the idea stage to the festival, editing (montage) techniques, and soundtrack creation. The program lasted throughout the year and attracted over 1,300 participants.⁽⁴¹⁾ The Music Commission presented a six-month virtual training program called “San’ah” (Profession). The program included various training tracks, such as artist management, DJ skills, sound engineering, and studio management.⁽⁴²⁾



Table 8: Examples of Qualitative Training Programs Offered by Cultural Commissions, 2022

Program	Type	Provider	Length	Number of Beneficiaries
Culinary Arts Incubator	Cultural Incubator	Culinary Arts Commission	5 days	130
Theater and Performing Arts Incubator	Cultural Incubator	Theater and Performing Arts Commission	4.5 months	16
Fashion Incubator	Cultural Incubator	Fashion Commission	5 months	176
Manga Industry	Intensive Training and Scholarship Program	Literature, Publishing, and Translation Commission	9 months	25
Filmmakers	Intensive Training Program	Film Commission	Throughout the year	1,310
Role of the Local Administration in Architectural Heritage Development and Conservation	Workshop	Heritage Commission	1 day	10
Safety and Security of Heritage Sites	Workshop	Heritage Commission	1 day	16
Theater Professionals	Intensive Training Program	Theater and Performing Arts Commission	2 weeks	50
San'ah Program	Virtual Training Program	Music Commission	6 months	410

The Royal Institute of Traditional Arts provides three different training programs of varying lengths. The continuous education program consists of short courses that last up to 30 days and cover topics such as Diwani Arabic calligraphy, hand embroidery, traditional stone arts, Al-Qatt Al-Asiri (female interior wall decoration), an introductory course on UNESCO, and others on ICH inventory. The institute also offers unique apprenticeship programs that last four to five months and are designed to teach handicrafts in a traditional style by shadowing an expert artisan. These apprenticeships

are offered at three levels to take the apprentice from learning the basics to strengthening their design skills, improving their product quality, and finally, focusing on entrepreneurship in the field of handmade cultural industries. In 2022, the institute offered two apprenticeship programs: one in traditional textiles (Sadu) and the other in traditional building techniques (mud building). These apprenticeships set the institute apart from other training organizations in Saudi Arabia.⁽⁴³⁾ Moreover, the institute offered a diploma in traditional building methods to educate and train students in Jeddah's

historical architecture through analysis, documentation, and research of its artistic and historical elements.⁽⁴⁴⁾

The MoC completed the first stage of its Experts Program in 2022. The program's primary objective is to train a group of experts and establish a network of accredited specialists in UNESCO programs and conventions. The Experts Program commenced in August 2021 with 53 candidates, with the aim of teaching them how to manage and prepare nomination files for international organizations, create international reports and follow-ups on the state of UNESCO-inscribed elements

and sites. The program began with a series of introductory workshops, which were developed in collaboration with the Saudi Heritage Preservation Society (We Are Our Heritage) and national and international experts, to prepare the participants for the specialist training program. In 2022, the participants enrolled in nine specialist training courses offered in partnership with UNESCO and the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), presented by a group of international experts (Table 9).⁽⁴⁵⁾

Table 9: Specialist Training Programs in the Experts Program, 2022

No.	Program	Number of Saudi Trainees	Number of Foreign Trainees
1	World Heritage Convention	23	1
2	Convention for the Safeguarding of the Intangible Cultural Heritage	19	4
3	Convention on the Protection of Underwater Cultural Heritage	9	2
4	Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property	15	4
5	Hague Convention for the Protection of Cultural Property in the Event of Armed Conflict	16	4
6	Man and the Biosphere Programme (MAB)	16	1
7	International Geoscience and Geoparks Programme	12	1
8	Creative Cities Network	20	4
9	Industrial Heritage Program	16	-





Cultural and Art Virtual Training

Virtual training has become an essential option in the culture and art sectors. It eases the effects of geographical distance and provides equal access to cultural and artistic training opportunities. However, training establishments have gone through several stages of relying on it. The COVID-19 pandemic forced many cultural and artistic training establishments to switch to virtual training. After the pandemic, in-person training returned, but with the option of virtual training available. This gradually led to the adoption of a hybrid training format in different ways based on the needs of each sector.⁽⁴⁶⁾ It is important to note that many training establishments offer virtual programs in theoretical fields that do not require training equipment or hands-on training. This has led to an increase in participation, both in terms of the number of participants and their geographical locations. The figures

of the 2022 Cultural Participation Survey confirm this, with 40.4% of virtual cultural training attendees enrolling in creative writing programs. This field does not require the trainer and trainees to be in the exact location.⁽⁴⁷⁾ An example of a successful program presented by the Rwaq Platform during the year was a virtual training course offered in linguistic fields with a large enrollment of trainees, reaching over 1,000 at times.⁽⁴⁸⁾ The WIPO Academy of the Saudi Authority for Intellectual Property (SAIP) provided all its training programs virtually throughout 2022. (Table 10).⁽⁴⁹⁾ In contrast, some entities provided virtual training in practical areas. For example, the Music Commission offered “San’ah,” its music industry training program, virtually.⁽⁵⁰⁾ This contributed to expanding the scope of beneficiaries geographically, as most of the qualitative training in culture and arts is usually concentrated in major cities.

Table 10: Examples of Virtual Training Programs by the WIPO Academy of the Saudi Authority for Intellectual Property, 2022

Program	Number of Beneficiaries
Introduction to Intellectual Property	167
Industrial Models/Designs: Filing and Classification Mechanisms	170
Intellectual Property in Fashion	91
Copyright, Related Rights, and Optional Registration	34
Berne Convention for the Protection of Literary and Artistic Works	96

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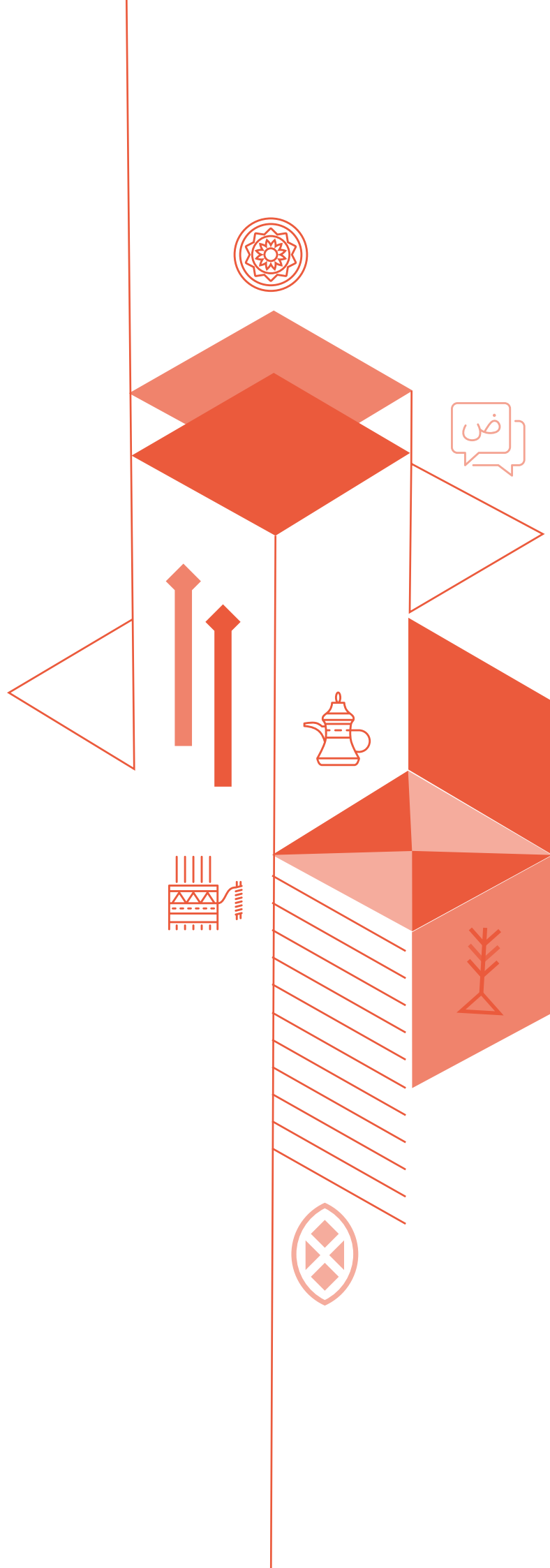
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4

Chapter Four

Cultural Participation

- Attendance and Diversity Indicators
- Notable Festivals and Events
- Cultural Tourism Indicator
- Social Integration Indicator





It is essential to familiarize ourselves with the state of cultural participation because it serves as a direct benchmark for the vitality of the cultural sector. Likewise, other facets of the sector depend on it. Cultural participation reflects the demand for culture and its actual presence in social life. The Report on the State of Culture continues to monitor the most prominent indicators dealt with in the 2021 version, especially attendance and diversity indicators, which reflect the reality of participation on the individual level, integration indicators that measure the reality of social participation in the non-profit field, and the cultural tourism indicator that provides another angle from which to view the state of participation, particularly in domestic tourism, despite its connection to the economic side of culture.

The 2022 data reveal a positive trend for cultural participation in Saudi Arabia on all levels, as all indicators recorded the highest numbers and high growth rates. This not only shows the post-COVID sector's recovery but also reveals the development of a solid foundation for participation in the cultural field. The hope is that this will motivate production within the sector, prompting more support for it overall. All the attendance and visit indicators for cultural activities and facilities rose at a rate that surpassed 65% of the total number of respondents in the Cultural Participation Survey for those who attended cultural activities. The situation is the same for the domestic cultural tourism indicator, which grew by more than 60% and increased its market share of domestic tourism. Non-profit organizations and amateur clubs in the cultural field have also grown in number. The positive development indicated by the data, however, lacks widespread geographical coverage and distribution, noting that the gaps between Saudi provinces are still present and that this growth is not consistent among the various cultural sectors.

Attendance and Diversity Indicators

The fourth edition of the Cultural Participation Survey presents evidence for the expanding scope of interest in cultural activities throughout 2022. The Survey data reflected positive indicators for cultural participation in all domains. The Survey was conducted in May 2023, and most of its variables measured the behavior of cultural participation throughout the previous twelve months, in addition to several trends, such as levels of satisfaction and preferences. The Survey covered a representative sample of 3,060 individuals across all Saudi provinces⁽¹⁾ and followed UNESCO's Framework for Cultural Statistics (FCS) for "Measuring Cultural Participation" alongside the applicable approaches in similar surveys worldwide.⁽²⁾

It is possible to gauge overall improvement in the levels of cultural participation by looking at the percentage of people who participated in at least one cultural activity throughout the year. This rate includes those who answered that, throughout the past twelve months, they attended or visited any of the nine cultural activities included in the survey (at least once). These nine activities are visiting museums; visiting libraries; visiting heritage sites; visiting nature reserves and parks; visiting art exhibitions; attending concerts; attending a play or performance; attending a

poetry evening; and attending festivals and cultural events. Note that the attendance rates in this composite measure rose from 54% in the 2021 survey to 66% in the 2022 survey, meaning that the sample segment that did not participate in any of the cultural activities made up one-third of the representative sample – shrinking compared to the number from the 2021 survey (Figure 1).

This uptick in cultural participation indicated by the Survey was not limited to certain activities. Still, it was observed throughout, showing that all the activities appearing in Figure 2 saw an increase in average participation between 2021 and 2022 without exception. The most significant increase was in the attendance of festivals and events, followed by the attendance of poetry evenings. This aspect of growth, which exceeds 25%, may be connected to the ongoing post-COVID recovery. As the 2021 Report on the State of Culture noted, the effects of the pandemic were still evident, even as there was a progressive return to cultural activity in some sectors, especially in the first month of 2021. The report's Survey recorded the presence of caution due to health concerns in some segments of the sample with respect to participation in cultural activities.⁽³⁾ Thus, it is likely that there will be an increase in 2022 averages, reflecting the sector's continued recovery from the effects of the pandemic.

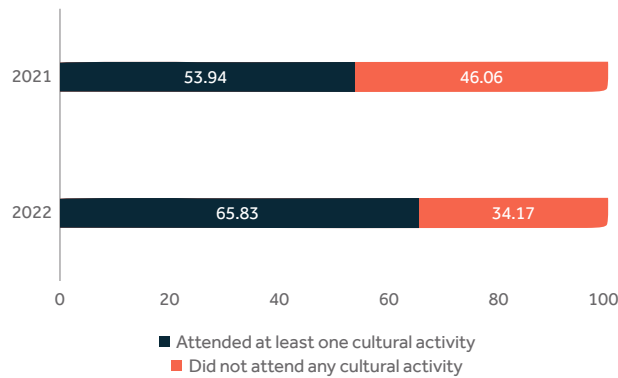


Figure 1: Percentage of Participants in any Cultural Activity in the Past Twelve Months⁽⁴⁾

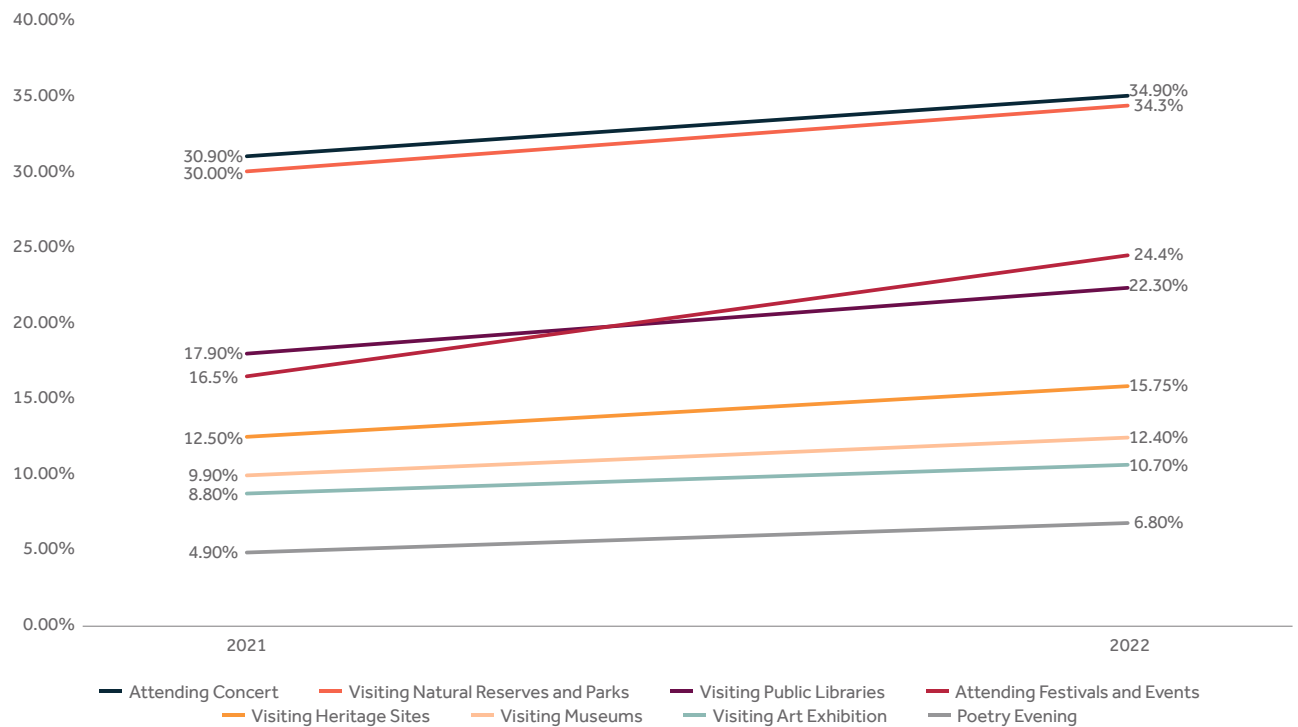


Figure 2: Relative Distribution of Participation in at Least One Cultural Activity in the Past Twelve Months by Cultural Activity⁽⁵⁾

Cultural activities vary by the size of the sample segment that participates in them. Visiting natural reserves and parks and visiting heritage sites have emerged as the most prominent cultural activities in terms of popularity throughout the year, as more than one-third of the sample cited visiting these places in 2022. One can observe this popularity in the low percentage of those surveyed who did

not visit or did not wish to visit these places, which did not exceed 9.5% of the sample in the case of visiting natural reserves and parks and only 8.6% for visiting heritage sites (Figure 3). On the other hand, the data show that poetry evenings and theatrical and performing arts were the least attractive cultural activities in 2022, which may be explained by the nature of these cultural activities and their audiences.

If we look, for example, at the level of participation in poetry evenings compared to the past years, we notice an increase that exceeds the first figure recorded in the 2019 Cultural Participation Survey (Figure 4).

In addition to actual participation, questions about possible participation were included in the measurement of event participation, gauging the level of interest in future cultural activities for those who did not participate in activities in the past twelve months. Generally, the level of interest is correlated with that of actual attendance for a given activity. Activities that recorded an approximate percentage of participation also recorded a comparable percentage of people wishing to attend in the future. We see this, for example, in the case of visiting art exhibitions, poetry readings, and theatrical and performing arts exhibitions. However, visiting museums and attending music concerts are notable exceptions. Music concerts have a lower percentage of individuals who wish to attend them in the future, with over 40% of the sample reporting that they did not attend and do not wish to attend concerts, which is a large percentage compared to any other activity. On the opposite end of the

spectrum, these measurements reveal a positive indicator for museum attendance, showing that a large section of the population wishes to visit museums in the future, which is more than any other activity, especially considering that the percentage of people visiting museums is relatively low. Only 11.5% of the sample did not visit or did not wish to visit museums, and this is a positive indicator if we compare it to most of the other activities (Figure 3). These data highlight widespread interest and reveal a massive opportunity for growth within the museum sector. It is also doubtful that the decrease in museum visits in Saudi Arabia can be attributed to the common assumptions about the state of the sector linked to a lack of awareness. Looking at the actual number of visits, the 2022 visits to public museums in Saudi Arabia exceeded a quarter million visitors, as was the case for the King Abdulaziz Center for World Culture (Ithra) in the Eastern Province, the Hejaz Railway Museum in Madinah, and the Masmak Museum in Riyadh. The number of visitors to the Saudi National Museum rose by 40% to reach 43,680 visitors compared to 31,309 visitors in 2021. This is a sign of post-pandemic recovery.⁽⁶⁾

Table 1: Number of Visits to Several Museums in Saudi Arabia, 2022

Museum	City	Number of Visitors
National Museum	Riyadh	43,680 ⁽⁷⁾
Masmak Museum	Riyadh	276,589 ⁽⁸⁾
Al-Zaher Palace Museum	Makkah	9,472 ⁽⁹⁾
Hejaz Railway Museum	Madinah	300,884 ⁽¹⁰⁾
Ithra Museums	Dhahran	360,994 ⁽¹¹⁾



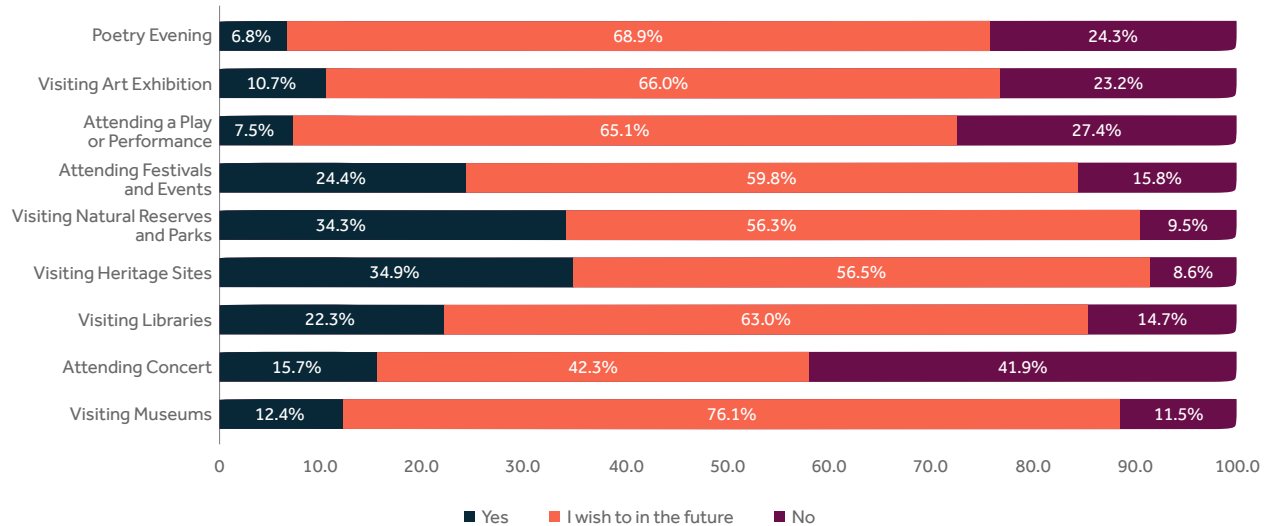


Figure 3: Relative Distribution of Individuals Reporting Visiting or Attending at Least One Cultural Activity in the Past Twelve Months, 2022⁽¹²⁾

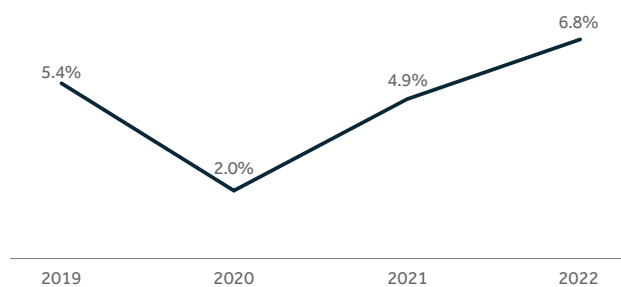


Figure 4: Percentage of Attendees of a Literary or Poetry Event, 2019-2022⁽¹³⁾

Digital and In-person Participation in Films and Music

Watching live music and films in cinemas are relatively recent options for cultural participation, so the broader availability of these options was accompanied by rapid growth. This is evident, for example, in the rise in the number of ticket sales from 6.5 million in 2019 to more than 14 million in 2022, despite the COVID-19 pandemic's disruption of this growth (Figure 5). This accompanies the growth resulting from new cinema openings every year,⁽¹⁴⁾ reaching 63 commercial cinemas by the end of 2022 with a total of 574 movie screens and 59,326 seats.⁽¹⁵⁾ However, the ways in which people engage in the music and film sectors have witnessed another form of transformation, not only on the local level within Saudi Arabia but also on the global level, namely the digitization of how people access films and music through digital streaming applications, and this may influence the percentage of people interested in cinemas.



The Cultural Participation Survey considers this context, shedding light on the matter and answering the question, "What is the state of participation and reception for music and films in a local context?" The data did not register a change in the percentage of people who prefer watching films in cinemas between the two editions of the survey in 2021 and 2022. This corresponds to the slowing growth in ticket sales recorded in 2022, reaching only 6% throughout the year compared to the post-pandemic recovery growth rate of 46% that was recorded in the previous year's report. This also matches the rise in the percentage of those who prefer watching films in cinemas from 2021 compared to 2020. A significant change was noted in the percentage of people who prefer watching films on digital streaming applications, which reached 34% of the sample in the pandemic year (2020), dropping in 2021 and rising again in 2022 (Figure 6).

Cultural Participation

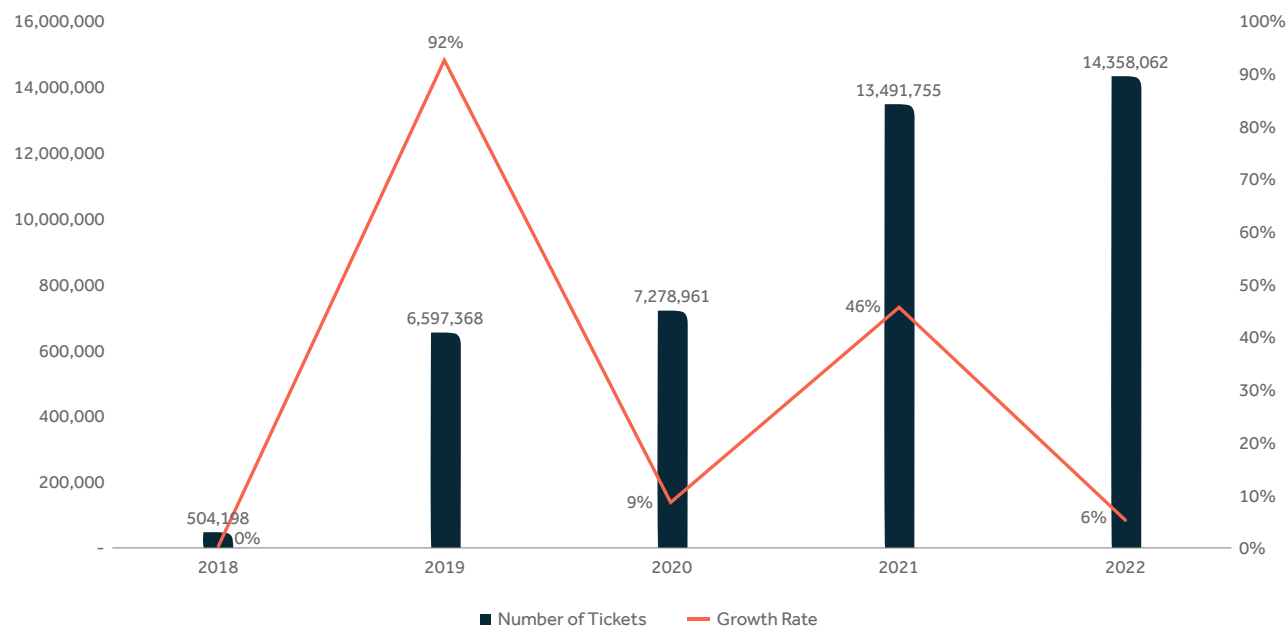


Figure 5: Number of Cinema Tickets sold in Saudi Arabia and Growth Rate Since Cinema Opening, 2018-2022⁽¹⁶⁾

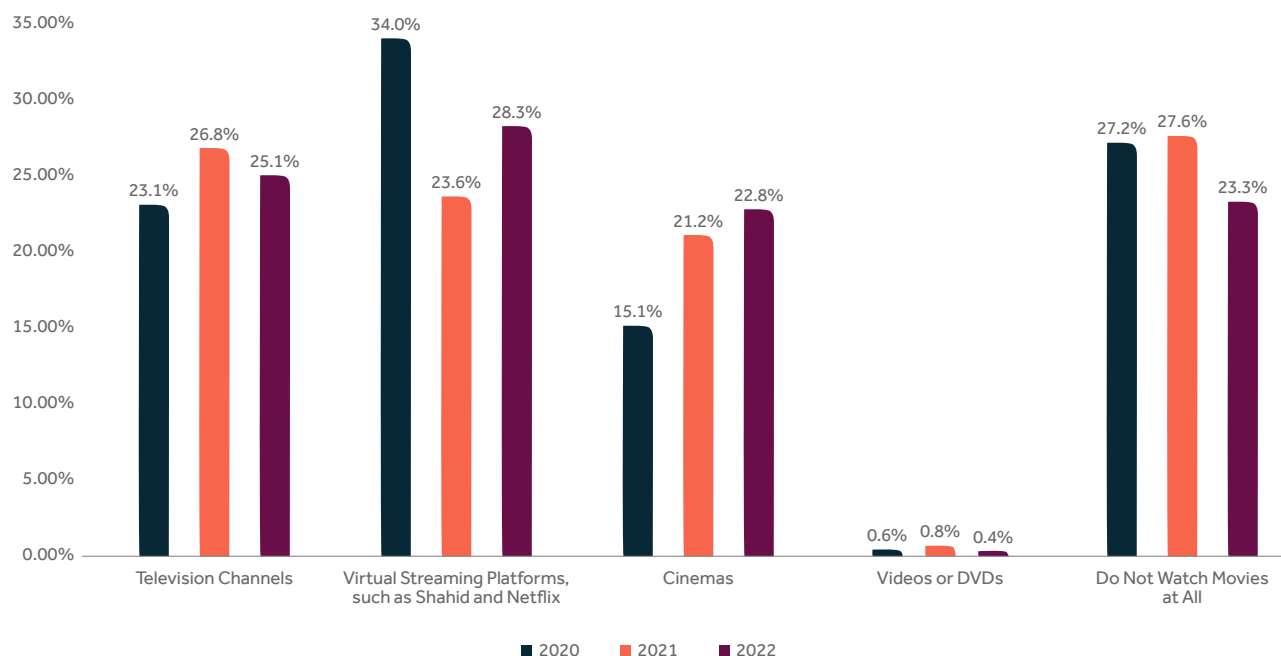


Figure 6: Relative Distribution of Film-Watching Modalities, 2020-2022⁽¹⁷⁾

As for the music sector, the level of participation reflects a different situation. The notable growth comes from attendance at live concerts, not from the digital consumption of music. The percentage of people who prefer attending concerts to other ways of consuming music jumped from 4%

to 9%, which is double the percentage compared to 2021. On the other hand, there is a great degree of consistency in the percentage of people who prefer listening to music on various digital applications, which reaches 43%, surpassing its counterpart in the film field (Figure 7).

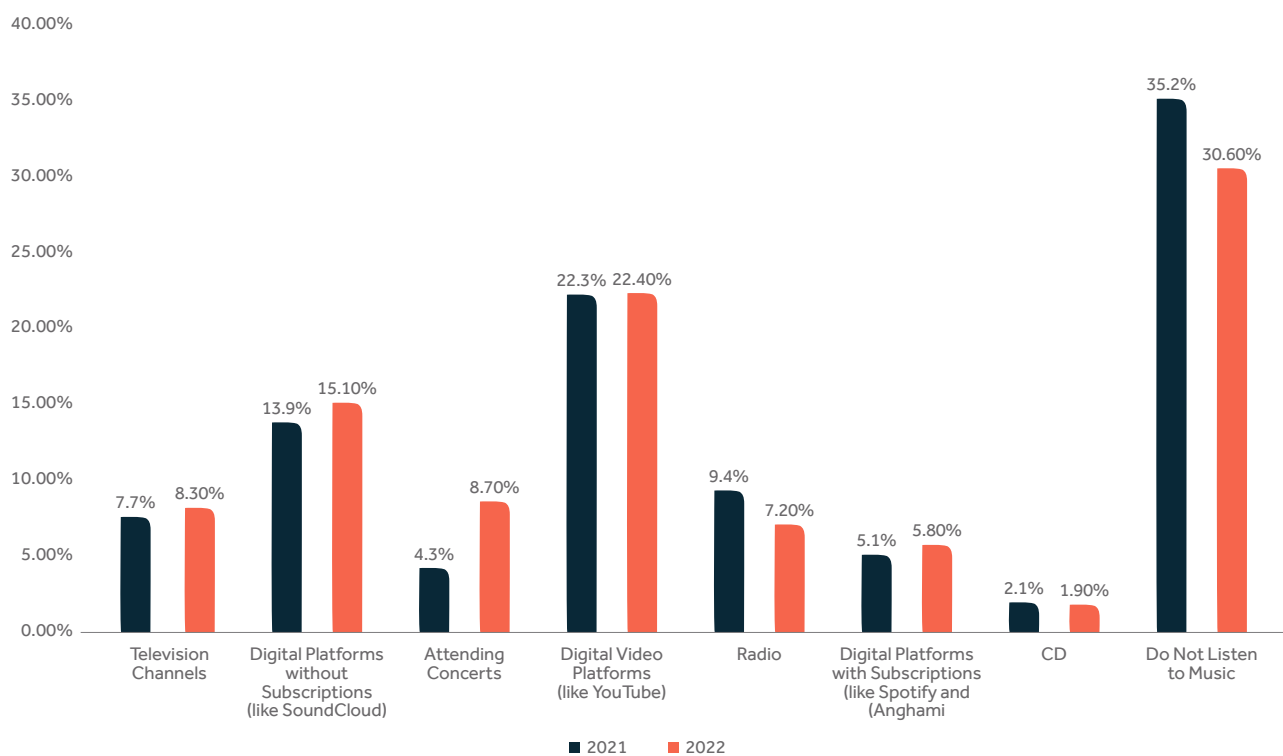


Figure 7: Preferred Methods for Listening to Music and Songs for Survey Sample, 2021-2022⁽¹⁸⁾

Disparity and Equality in the Participation of Different Social Groups

One of the most essential features of the growth seen in cultural participation averages in 2022 is that it has broadened to include different social groups. This can be clearly observed in the age distribution of participation, which not only witnessed growth for age groups that had the lowest participation but also showed decreased discrepancies between age groups regarding their levels of participation in cultural activities. The growth in participation levels for the 18-24 age group, despite it being the group with the highest level of participation, was less than that of the older age groups, closing the gap between generations regarding participation in cultural activities. This ascending increase in growth is consistent among all the groups, with the growth for the groups aged 25-44 being higher than the participation growth among the younger group. Similarly, the level of participation of groups older than 45 grew more than that of the younger age groups, with the average growth reaching 30% compared to 7% for the younger group (Figure 8). Overall, despite the continued age-based disparity in average cultural activity participation, this disparity is occurring on a narrower scale, as shown by the 2022 Cultural Participation Survey data.

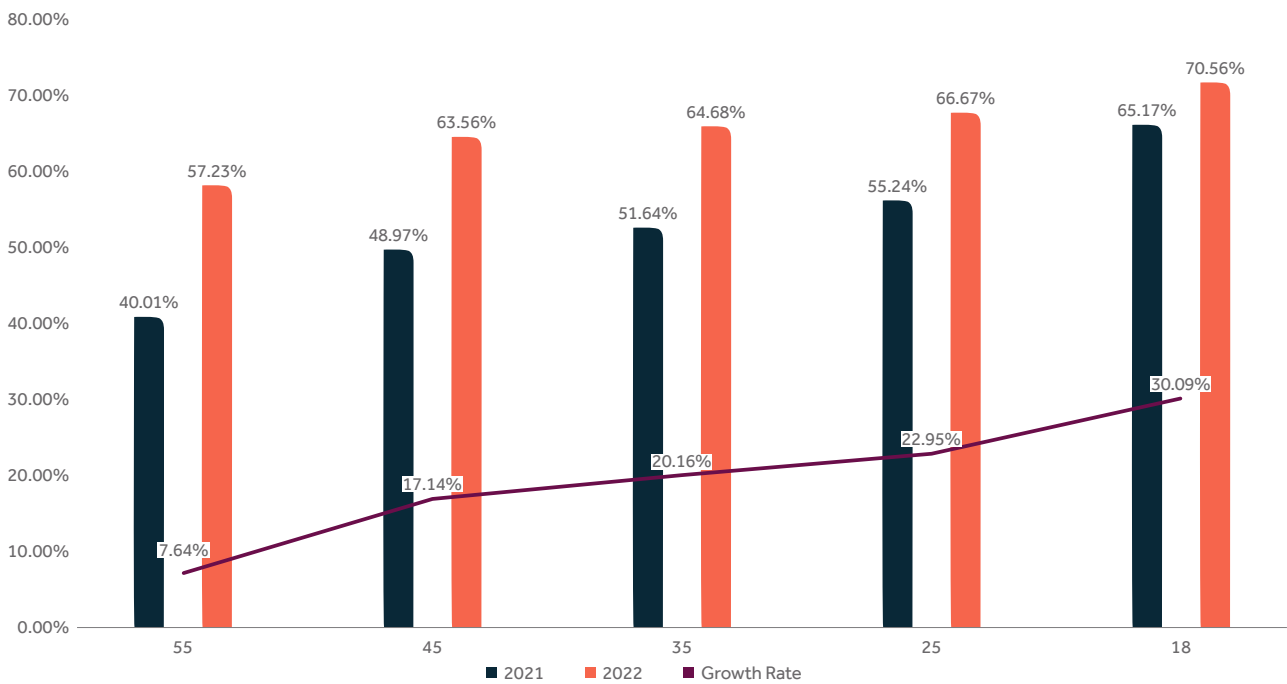


Figure 8: Relative Distribution of Participants in at Least One Cultural Activity in the Past Twelve Months by Age and Average Growth

Though there is greater social diversity in cultural participation regarding age, the 2022 Cultural Participation Survey points out that there is still a gap between people of different income levels regarding the extent of their participation in cultural activities. About 75% of the lowest earning quartile of the sample reported they did not attend or participate in a cultural activity of any kind in the past twelve months. On the other hand, in the highest-earning quartile, 45% reported participating in at least one cultural activity, which is approximately double the number of people from the lowest-earning quartile. The two other groups from the middle two quartiles were relatively equal.

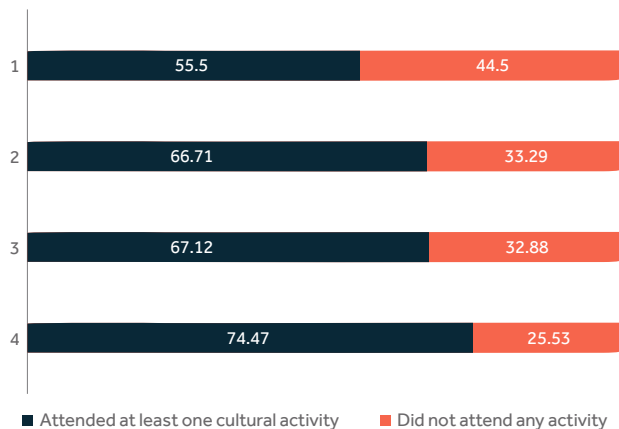


Figure 9: Percentage of Participants in at Least One Cultural Activity in the Past Twelve Months by Income Level, 2022

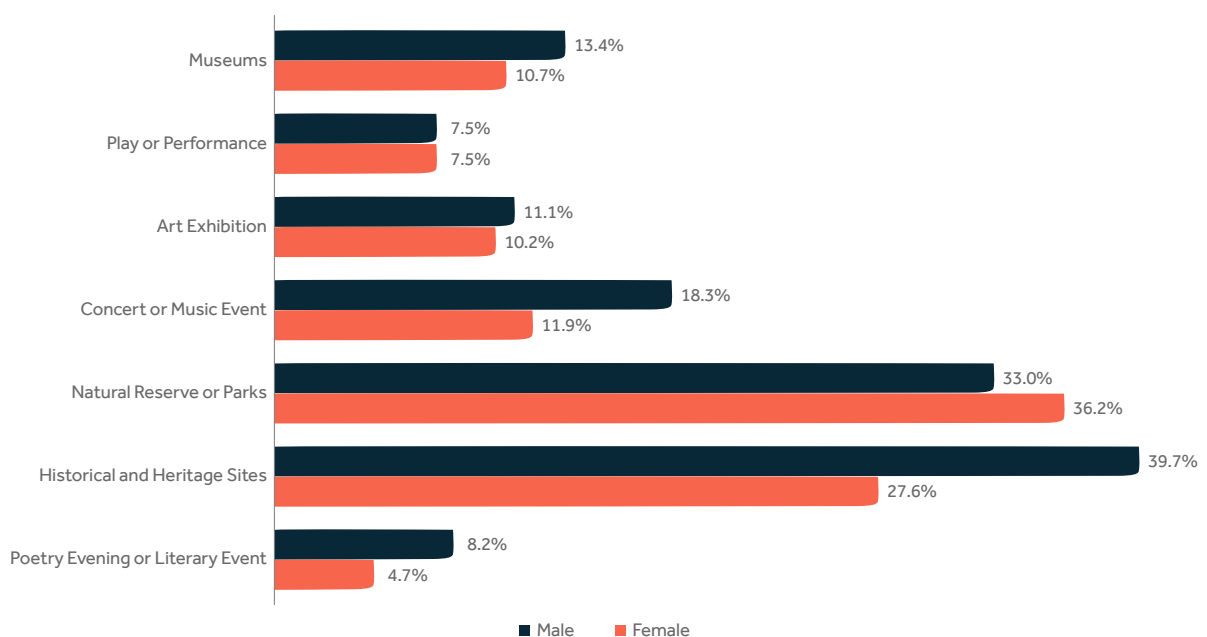


Figure 10: Relative Distribution of Visits/Attendance in the Past Twelve Months by Gender, 2022



Regarding gender, the 2022 Cultural Participation Survey shows an increase in the percentage of women who visited natural reserves and parks, rising from 29.2% in 2021 to 36.2% in the 2022 Survey. The percentage of men was comparable between the two years. Besides this, the Survey reflects the same patterns observed in the 2021 Survey, especially in the evident gap between men's and women's levels of participation in poetry evenings and literary events. This is a pattern that the Cultural Participation Survey continued to record for four years without a notable change toward closing this gap. The situation is the same, though to a lesser degree, for the gender gaps in concert attendance and museum visits (Figure 10).

Notable Festivals and Events

Festivals and cultural events are among the most popular cultural activities in Saudi Arabia, ranking third in terms of attendance rates in 2022. Out of the sample taken from the Cultural Participation Survey in its fourth iteration, 24.4% reported attending at least one festival in the past 12 months, compared to 16.4% in 2021. This means an increase of 8% (Figure 11), which is commensurate with the increase in attendance rates in general this year, as indicated at the beginning of this chapter. Even though event and festival attendance rates did not reach pre-pandemic levels (Figure 11), they remain of note because, among other activities, they recorded the highest increase this year from among all other activities compared to 2021 (Figure 12).

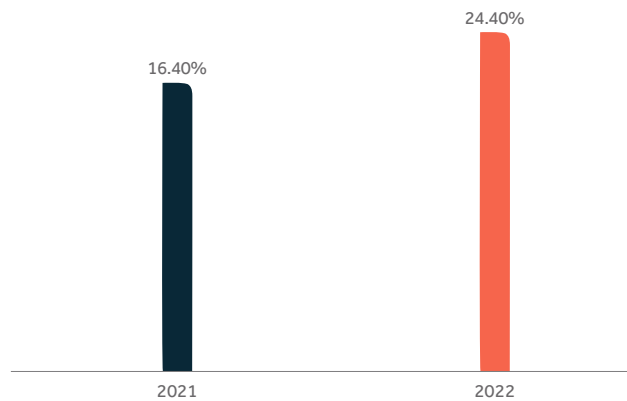


Figure 11: Attendance Rates of Festivals and Cultural Events, 2021-2022⁽¹⁹⁾

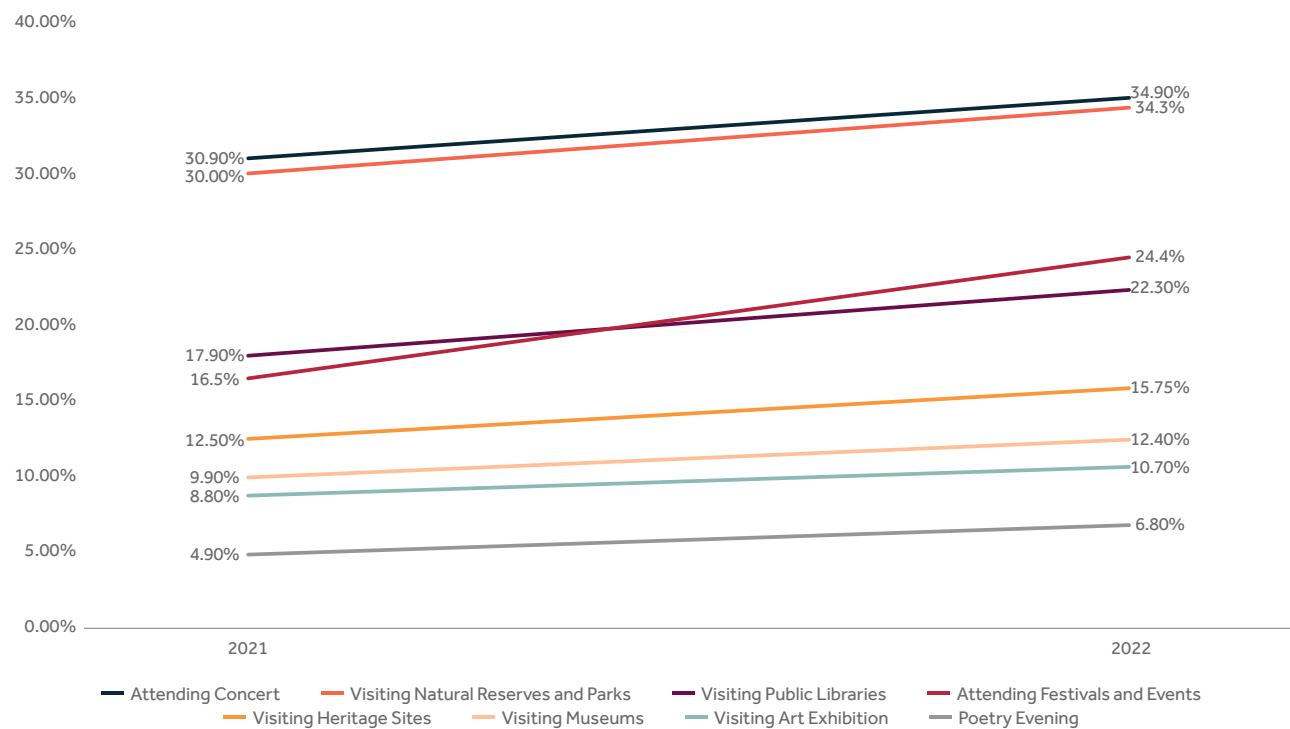


Figure 12: Relative Distribution of Visits and Attendance for Various Cultural Sectors, 2021-2022⁽²⁰⁾

Notable Cultural Exhibitions

One of the most prominent exhibitions held in 2022 was the "Hijrah Exhibition," which celebrated the most important event in Islamic history: the Prophet's Hijrah (i.e., migration) from Makkah to Madinah. The exhibition was held at the Ithra Center in cooperation with several cultural institutions, including the National Museum in Riyadh, the House of Islamic

Arts in Jeddah, the King Abdulaziz Complex for Endowment Libraries in Madinah, and the Turquoise Mountain Foundation. The exhibition showcased several topics that shed light on the Prophet's Hijrah, its importance in the Islamic world, and its stages. It did so through artistic works, compositions, and art pieces that present a cultural, social, artistic, and religious narrative of this unique journey. This was the work of almost 70 artists, experts, and researchers, while other

participants presented a selection of unique artifacts offered by the participating entities.⁽²¹⁾ The exhibition, which started at the end of July and lasted for nine months, was held in the Great Hall in Ithra and was attended by 62,147 visitors. After Dhahran, it will relocate to Jeddah, Madinah, and Riyadh. It will then tour several international cities.⁽²²⁾

The Architecture and Design Commission held the King Salman Charter for Architecture and Urbanism Exhibition in four provinces: Madinah, Eastern, Makkah, and Asir. It had 7,355 visitors. These exhibitions showcased a part of the history of Saudi architecture, introducing urban models defined by the Charter standards.⁽²³⁾ The Commission also held the inaugural edition of the Saudi Design Festival in the Jax District of Diriyah on January 09-29, 2022, as an extension of Design Week, held between 2014 and 2019. The festival targets local and international architects and designers to start a dialogue and push the local industry forward. It had 45,000 visitors this year. Within this context,

the Commission seeks to promote communication and the exchange of experiences among designers and architects through the Architects Communication Forum and the Communication Café. These hosted more than 1,000 architects and designers in five provinces. The aim was to introduce the values of the Charter, improve knowledge of urban heritage, and develop urban landscapes.⁽²⁴⁾

One of the most prominent manifestations of the advancements of the cultural sector occurred in Riyadh. The most significant event in contemporary arts, the Biennale Contemporary Art Exhibition, was held in the Jax District for Art in Diriyah.⁽²⁵⁾ It lasted from December 2021 to March 2022 and had over 104,190 visitors.⁽²⁶⁾ In addition to this, the Riyadh Art Project held the Noor Riyadh Exhibition in 40 different locations under the theme "We Dream of New Horizons." It is one of the largest global light arts celebrations, held on November 03-19, 2022,⁽²⁷⁾ with 2.8 million visitors.⁽²⁸⁾

Table 2: Number of Visitors to the Most Prominent Exhibitions held by the Visual Arts Commission, 2022⁽²⁹⁾

Title of Exhibition	Type of Exhibition	City	Date	Number of Visitors
Digital Art Forum NFT ⁽³⁰⁾	Digital Art	Riyadh	25/02/2022-27/02/2022	1,350
Street Art (Murals) Shift22 ⁽³¹⁾	Street Art	Riyadh	13/10/2022 – 30/10/2022	39,098
Find Me Through the Fog ⁽³²⁾	Visual Art	Abha, Riyadh	01/09/2022-24/09/2022	1,617 2,476
Intermix Residency Art & Fashion Reimagined ⁽³³⁾	Mixed Art	Riyadh	24/12/2022-28/02/2023 ⁽³⁴⁾	200

Several exhibitions were also held at non-commercial art institutions. These showcased various art forms, including visual art, digital art, printing, photography, and others (Table 3).



Table 3: Number of Visitors to the Most Prominent Art Exhibitions, 2022

Title of Exhibition	Type of Exhibition	Organizer	City	Date
Al-Astar Exhibition	Mixed Art	Madinah Art Center ⁽³⁵⁾	Madinah	05/05/2022–15/01/2023
Nabawi Exhibition				
Muqtatfat Exhibition				14/02/2022–23/3/2022
Khef Exhibition				16/03/2022–23/03/2022
Muraba Exhibition				01/12/2022–25/01/2023
7 Exhibitions	Mixed	Art Jameel ⁽³⁶⁾	Jeddah	-
10 Exhibitions	Mixed	Misk Arts ⁽³⁷⁾	Riyadh	-
Kaaf. Laam. Meem.	Arabic Calligraphy	Hafez Gallery ⁽³⁸⁾	Jeddah	04/01/2022–11/10/2022
Tracing the Placid	Abstract Art	Hafez Gallery	Jeddah	03/03/2022–14/03/2022
Huriyyat Jeddah	Canvas Printing and photography	Hafez Gallery	Jeddah	26/11/2022–24/12/2022
Episodic Memory	Mixed Art	Hafez Gallery	Jeddah	17/05/2022–22/06/2022
Salasel Maazy	Abstract, Expressionist	Gallery 015 ⁽³⁹⁾	Riyadh	20/03/2022–31/03/2022
Alia Al-Farsi	Abstract	Gallery 015	Riyadh	24/02/2022–04/11/2022
Saudi Art in Three Decades	Realistic, abstract, and expressionist	Gallery 015	Riyadh	-



In the fashion sector, the second edition of the exhibition "I Am an Arab Woman," which brings together the most notable Arab brands, as well as the "Perfume Expo" at the Riyadh Front on the sidelines of the Riyadh 2022 season, were organized by the General Entertainment Authority on December 10-16, 2022. The exhibitions were attended by 82,178 visitors.⁽⁴⁰⁾ The second edition of the Saudi 100 Brands, launched by the Fashion Commission to support and develop local brands, was held on December 22-25, 2022, at the King Abdullah Financial Center in Riyadh. There were also two international exhibitions, the first in New York City in the United States of America and the second in Milan, Italy.⁽⁴¹⁾ The Commission also cooperated with Ithra Center in holding the Saudi Fashion Exhibition between November 08 and December 03, 2022, presenting a set of designs inspired by Saudi heritage alongside contemporary designs. It had 6,516 visitors.⁽⁴²⁾

In the publishing sector, the Riyadh International Book Fair was held at the Riyadh Front, and the Jeddah International Book Fair was held in the Jeddah Dome. The first edition of the Madinah Book Fair was also launched at the King

Salman International Convention Center. The number of visitors to the Riyadh International Book Fair exceeded one million (Figure 18). As part of activating libraries to be centers for social and intellectual participation at the national level and linking them to global cultural activity, the second session of the Riyadh Philosophy Conference was held at the National Library, organized by the Literature, Publishing, and Translation Commission under the theme "Knowledge and Exploration: Space, Time, and Humanity"⁽⁴³⁾

on World Philosophy Day.⁽⁴⁴⁾ A group of thinkers, scientists, and philosophers from Saudi Arabia participated alongside intellectuals from other Arab and non-Arab countries. The activities and the participants were not limited to the cultural elite. The scope of the audience was expanded through workshops open to the public. There was also a philosophy pavilion for children. It ran through the first three days of December in conjunction with UNESCO's celebration. The total number of visitors reached 2,400.⁽⁴⁵⁾

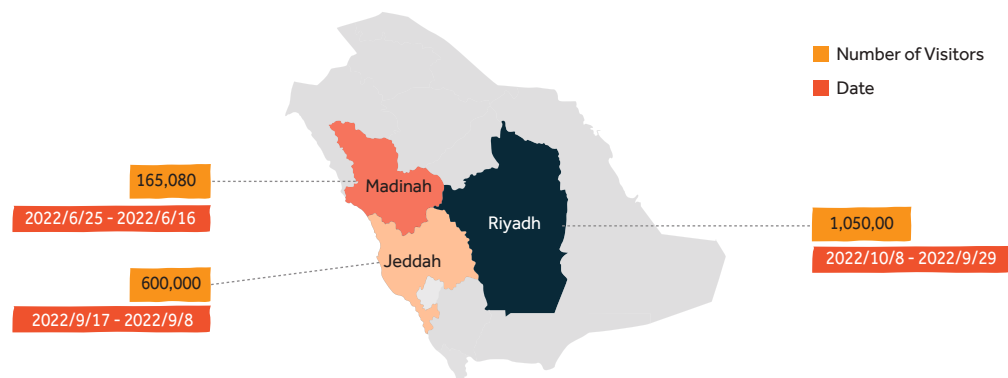


Figure 13: Number of Visitors to Book Fairs, 2022⁽⁴⁶⁾

Cultural Festivals

Several cultural festivals were held in 2022. This part of the chapter reviews the most significant festivals held during the year. In the film sector, the eighth edition of the Saudi Film Festival was held from June 02 to June 09. This marks the first edition of the festival to be organized by the Saudi Cinema Association in Khobar, which was established in 2021 after being transferred from the Saudi Arabian Society for Culture and Arts (SASCA) in Dammam. It was organized through a partnership between the SASCA and the Ithra Center. The total number of visitors reached 16,245 over a week in June.⁽⁴⁷⁾ This marks an increase of 50.42% over last year. The festival was also broadcast live on its YouTube channel, which had 60 programs, including dialogues and interviews with the festival's guests. This helped expand the audience and followers.⁽⁴⁸⁾ The number of participants, including artists, directors, and screenwriters, reached 400. In terms of film submissions, there were 214 entries, including feature-length and short narratives as well as documentaries. Out of these, seven feature films, 47 short films, and ten documentaries were selected to compete for the Golden Palm Award.⁽⁴⁹⁾ The festival, which was held in Dhahran, aimed to provide opportunities for those interested in the film industry and to create an environment for the exchange of ideas and experiences among experts and talented people. This is



why the festival held five training workshops in the fields of production, directing, soundtracks, distribution, and acting, as well as a script development lab for unproduced scripts.⁽⁵⁰⁾ The production market took place in the Great Hall, which served as a space for production companies and supporting and organizing bodies from the sector to communicate with filmmakers, allowing 20 parties to participate in this space.⁽⁵¹⁾ In Jeddah, the second edition of the Red Sea International Film Festival was held from December 01-10 at the Ritz-Carlton Hotel. It was attended by 35,000 people⁽⁵²⁾, reaching an approximate 8% growth rate compared to the year 2021.⁽⁵³⁾ The festival showcased 131 films from 61 countries in 41 different languages, including 35 films directed by women, out of which 34 were world premieres during the festival, 17 premiering for the first time in the Arab World. The number of Saudi films screened was 25, while 47 films by filmmakers from the Middle East and North Africa were shown.⁽⁵⁴⁾ The festival presented a series of workshops and discussions aimed at providing a space for filmmakers in Saudi Arabia to meet international specialists through the Red Sea 360o show. Several programs were devoted over two days to the new generation of filmmakers under the name "Talent Days."⁽⁵⁵⁾ These programs were part of the activities of the production souq, in which 48 companies and destinations working in the film sector participated.⁽⁵⁶⁾

In the visual arts sector, the year witnessed the establishment of the Jax Arts Festival, organized by the MoC in Riyadh, in the Jax District of Diriyah, with 35,664 visitors within ten days of July. The festival included several windows showcasing various art programs. These included exhibitions, events, and interactive art activities under the title "Jax... A Journey Driven by Curiosity!" The festival aims to highlight the importance of the Jax District as a space for artists, creative professionals, and companies to exchange knowledge. It also targets the public to establish an artistic environment for enjoying local and international styles and works of art as a lifestyle.⁽⁵⁷⁾

The Saudi Culinary Arts Commission's participation was highlighted by several festivals, which included, for example, the "Desert Truffle Festival" in January and the "Seafood Festival" in Jeddah over four days in March. These had 19,000 and 4,600 visitors, respectively. The Commission also organized the Saudi Feast Food Festival in Riyadh over 18 days in December, with a total number of 100,000 visitors. In addition to the entertainment and commercial aspects, these festivals acted as a platform for amateur and professional chefs to think of new dishes. Local agricultural and food products were integrated into local and international recipes and then presented to the public. The Qassim Dates Festival, lasting throughout August 2022 in the city of Buraidah, included several cultural events such as plays, forums, and



cultural events. It had 35,000 visitors.⁽⁵⁸⁾ The festival is about showcasing national products and supporting farmers by connecting them to the commercial market. Farmers' markets were held in Jeddah over two days in August to support local fruit produce.⁽⁵⁹⁾ They were also held during October in Khobar in cooperation between the Commission and Khobar Municipality to support the cultivation of fruits in general and pomegranates in particular. These markets were set up at the waterfront in both cities. The Truffle Festival was held in Al-Kindi Square in Riyadh in cooperation with the Royal Commission for Riyadh City over four days in March, and the number of visitors to these markets reached 52,700 visitors.⁽⁶⁰⁾ The "Farmers' Market" is an open space for local farmers supported by the Saudi Culinary Arts Commission to introduce their produce, dishes, and prepared food. The market included a theatrical performance, live music performances, and a restaurant area that serves dishes made from the market's produce. It also included an interactive corner for children and another for coffee, in line with the "Year of Saudi Coffee 2022" initiative.⁽⁶¹⁾ This initiative comes from the MoC, supported by the Quality-of-Life Program, to highlight coffee and its connection to cultural and social heritage in Saudi Arabia. It culminated in several exhibitions. In addition to the above, the Saudi Coffee Festival was held over three days in Riyadh in September⁽⁶²⁾ and then in Jeddah and Khobar in October. The total number of visitors exceeded 130,000 visitors.⁽⁶³⁾

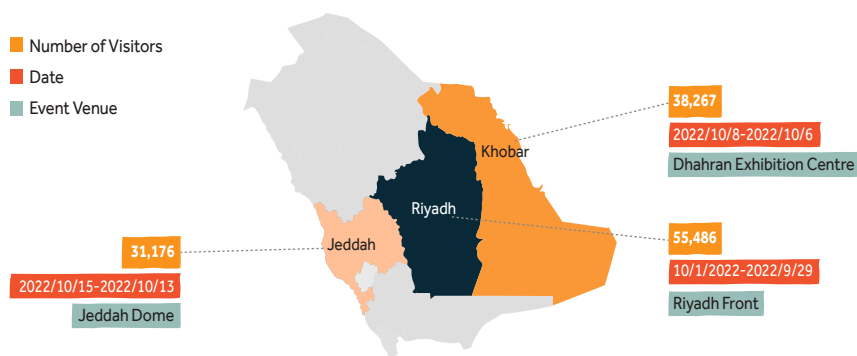


Figure 14: Number of Visitors to the Saudi Coffee Festival, 2022^[64]

The Museums Commission also organized an exhibition entitled “Saudi Coffee at the Masmak Palace Museum – A Multi-Sensory Experience” in Riyadh from mid-October to the end of December 2022. The exhibition showcased several stations that introduced the types and flavors of coffee in the various Saudi provinces, as well as how it is roasted, preparation methods, and the tools used in making it. This was in addition to a review of Saudi literature that evoked the customs, heritage, connotations, and symbolism surrounding coffee in literature, poetry, and tradition. There was also a station dedicated to coffee production methods, consumption, and trade that introduced the past and present processes and the transformations they have undergone.^[65] The event lasted for 78 days, starting from October 15, 2022, and had approximately 91,000 visitors.^[66]

In the music sector, the “Arabic Jazz Festival” was held in the Eastern Province on July 22-23 at Dhahran Expo. It presented a group of Saudi, Arab, and European jazz artists, with the oud added to musical performances to play unique songs. Traditional melodies and music were also presented by the Saudi National Music Band, drawing 1,340 visitors.^[67]



The festival, organized by the Music Commission, aims to promote national and Arab participation in the music sector.^[68]



Cultural Participation

Table 4: Number of Visitors to the Most Prominent Cultural Festivals Organized by the MoC, 2022⁽⁶⁹⁾

Event Title	City	Start Date – End Date	Number of Visitors
Qimam Mountain Performing Arts Festival	Abha	28/01/2022–03/02/2022	1,057
International Jazz Festival	Riyadh	29/03/2022–31/03/2022	1,658
Taif Rose Festival 2022	Taif	12/05/2022–13/05/2022	497
Al-Bisht Al-Hassawi	Al-Ahsa	18/06/2022–20/06/2022	22,702
International Opera Festival	Riyadh	14/07/2022–23/07/2022	849
Antarah Cultural Festival	Al-Qassim	27/11/2022–01/12/2022	7,278
Kutwa Al Junoobiya Festival	Abha	01/12/2022–03/12/2022	1,247
Tharaa Traditional Performing Arts Festival	Riyadh	24/02/2022–24/02/2023	1,897

Table 5: Most Prominent Theatrical Performances by the MoC, 2022⁽⁷⁰⁾

Performance Title	City	Start Date – End Date	Number of Visitors
Al-Asha	Riyadh	23/12/2021-01/07/2022	2,972
Satih Al-Bayt	Riyadh	09/02/2022-15/02/2022	600
Cave of Stories	Riyadh	14/02/2022-20/02/2022	159
Repertoire	Riyadh	02/03/2022-02/04/2022	262
Lubna	Madinah	06/05/2022-14/05/2022	351
Princess of Ashes	Riyadh	26/04/2022-10/05/2022	490
Jamil Bouthayna	Riyadh	1/06/2022-15/06/2022	4,209
Qays and Layla	Riyadh	01/09/2022-24/09/2022	1,989



Table 6: Number of Visitors to Plays and Performances presented by the SASCA, 2022⁽⁷¹⁾

City	Attendance Numbers for Plays	Number of Plays ⁽⁷²⁾	Number of Children Shows	Attendance Numbers for Performances	Number of Performances
Riyadh	116,264	1,306	175	120,929	173
Jeddah	1,120	5	3	10,000	35
Al-Ahsa	400	3	4	6,000	59
Dammam	10,000	24	11	80,000	12
Taif	543	3	-	783	3
Abha	600	3	-	2,050	12
Al-Qassim	533	2	1	766	12
Arar	1,800	8	6	18,000	36
Al-Jouf	200	4	2	200	6
Najran	550	4	1	600	8
Tabuk	1,300	3	1	170,000	57
Jazan	-	-	-	-	-
Al-Baha	1,000	3	1	5,000	22
Hail	1,483	4	-	52	1
Madinah	456	1	-	4,317	12
Bisha	3,000	3	8	4,000	22
Total	139,249	1,376	213	422,697	470

The fifth edition of the Tanween Creativity Season was held at the Ithra Center in Dhahran and titled “Cooperation,” as it is an essential value in the creative process. It lasted from October 27 until November 12 and had 10,737 visitors. It aims to provide a space for creative professionals in three areas, including the creative industry, graphics and communication, and architectural design. Each of these offers a set of conversations and workshops, as well as consulting sessions to discover and develop skills.⁽⁷³⁾

In terms of the international events in which Saudi Arabia participated, one of the most noteworthy was the participation of the Saudi Culinary Arts Commission in the Agora Expo. It showcased dishes and food products from several countries to introduce various international culinary cultures and arts, including Saudi culture. The exhibition was held over three days from the beginning of September in Paris, France. More than 24,000 visitors attended it.⁽⁷⁴⁾ The exhibition “Teaching Tree” by the artist Muhannad Shono was held in the Saudi pavilion at the Venice Biennale, Italy.⁽⁷⁵⁾ The Biennale was held from April 23 until November 27, and the total number of visitors reached 226,649.⁽⁷⁶⁾

Attendance Motives and Satisfaction Rates

In addition to rates of interaction with cultural events in terms of practice, as measured by attendance indicators, the Cultural Participation Survey measures the levels of audience satisfaction with the events presented, which provides a deeper understanding of the dimension of cultural practice. It shows the satisfaction of visitors with the events held and their motives for attending or not attending cultural events while analyzing and comparing social variables such as age group and province.



Despite the overall increase in attendance rates observed in this chapter compared to last year, 2021 (Figure 15), the motives were like those from last year with slight variation, as shown by the results of the Cultural Participation Survey in its fourth iteration compared to the third one. The first motive for “companionship of family and friends” came again at the top of the list at 46.4%, whereas it was 50.7% last year. Convenient timing came second at 14.4%, followed by the factor of ticket pricing: “free admission or reasonable ticket prices” at 14%. Both factors increased from last year’s rates of 12.9% and 12%, respectively (Figure 16).

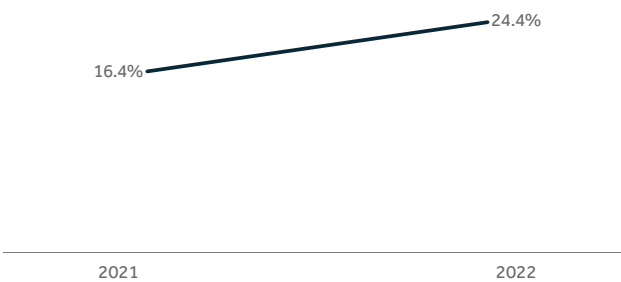


Figure 15: Attendance Rates for Festivals and Cultural Events, 2021-2022⁽⁷⁷⁾

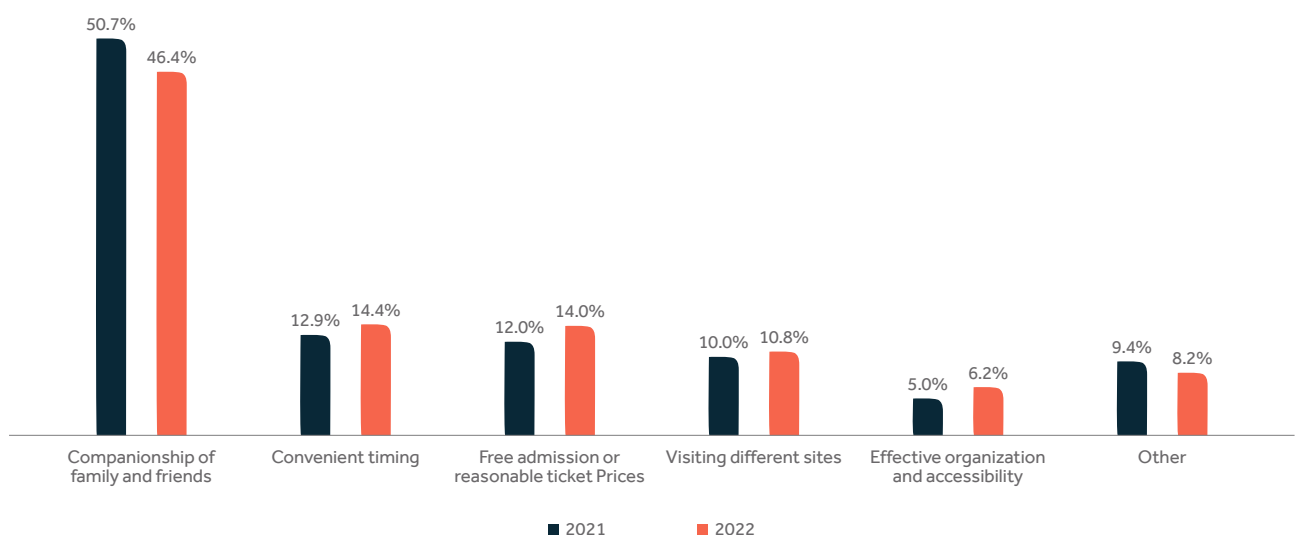


Figure 16: Primary Motive for Attending Festivals and Cultural Events, 2021-2022⁽⁷⁸⁾

These motives align with Survey answers that revealed the reasons people do not attend events. Being preoccupied or having work commitments were the reasons for nearly half (41.2%) of the Survey sample that answered “No” to the question of “attending at least one cultural event or festival

in the past 12 months.” Next was lack of time, reaching 36.2%. This was followed by financial considerations, with an increase of 11.4% over last year (Figure 17). This aligns with the observations of the diversity index above, which revealed high rates of visits among those with high incomes.

Cultural Participation

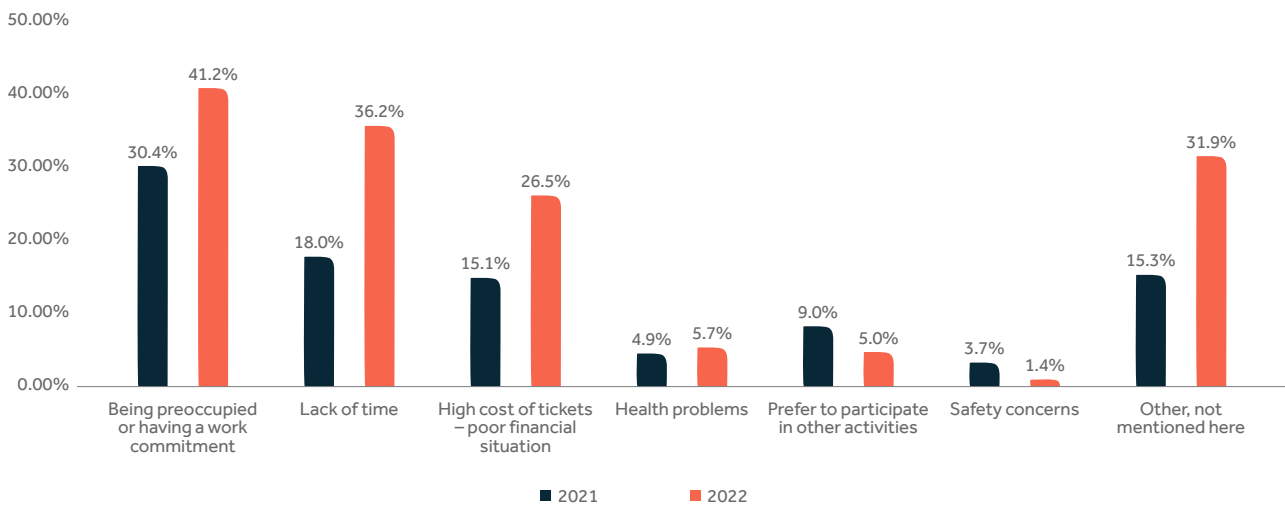


Figure 17: Primary Reason for Not Attending Cultural Events and Festivals, 2021–2022⁽⁷⁹⁾

Given social variables, it was noted that the 50-and-over age group had the highest levels of satisfaction with the events and festivals attended. However, it was also the least involved group in terms of reception as recorded by the attendance index. The inverse relationship appeared in the levels of satisfaction for the 18-34 age group, which had the highest attendance rate but the lowest satisfaction rate compared to other age groups. This inverse relationship is not necessarily accurate, as the attendance rate of the older age group was low compared to the rest of the age groups (Figure 18), which may lead to a high percentage of satisfaction among this younger group of the sample (28.8%), despite the high attendance rates. Based on Figure 24, the satisfaction rate was high for all groups, exceeding 60%. Furthermore, the variance in the rate of dissatisfaction for all age groups was meager, being less than 8%.

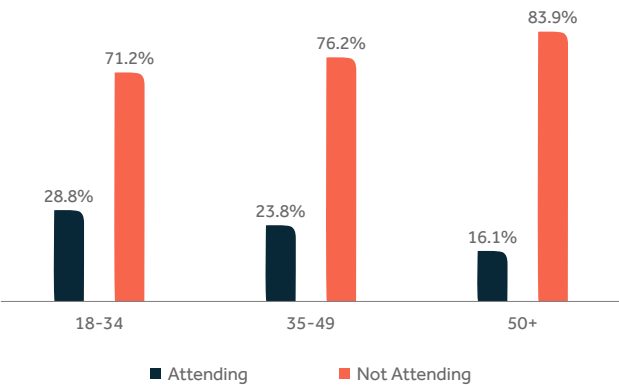


Figure 18: Attendance Rate for Cultural Events and Festivals by Age Group, 2022⁽⁸⁰⁾



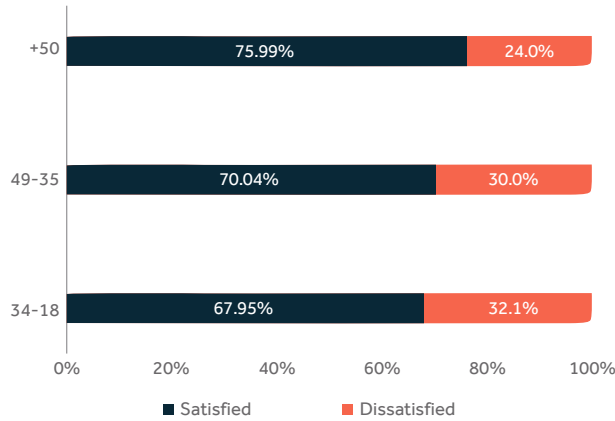


Figure 19: Satisfaction Rates with the Availability of Festivals and Cultural Events by Age Group, 2022⁽⁸¹⁾

With the distribution of events among the thirteen Saudi provinces, the difference in satisfaction rates between the provinces shows a concentration of cultural activity and services in Riyadh City. Out of the sample, 84% of those who attended at least one cultural event or festival in Riyadh Province in the past twelve months were satisfied

with the activity presented. This was followed by 72% in Makkah Province. As indicated in the report in several places, these two provinces had the most significant number of events, the most cultural facilities, and the highest concentration of organizers and operators in the sector.⁽⁸²⁾ The satisfaction rates for other provinces were as follows: Jazan (68.2%), Hail (61.5%), and Najran (61.1%), while Al-Qassim Province was the least satisfied with cultural events by 50% (Figure 20).

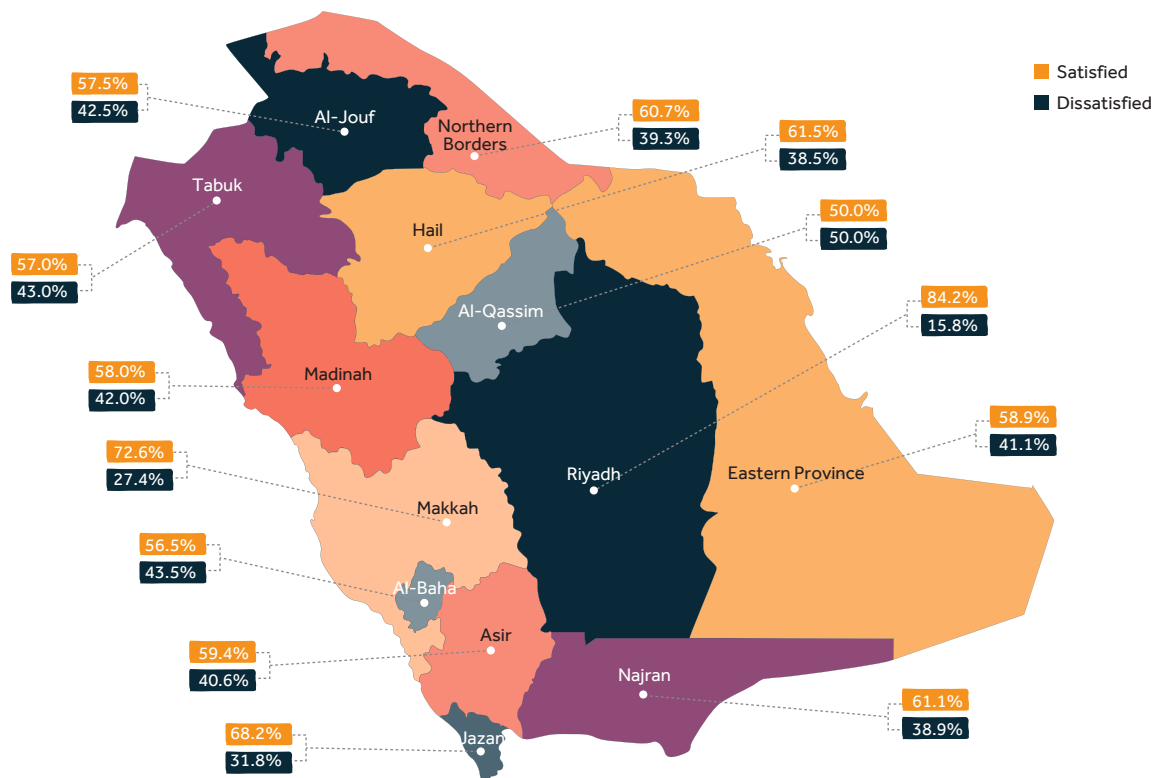


Figure 20: Satisfaction Rates with the Availability of Festivals and Cultural Events by Province, 2022⁽⁸³⁾

Cultural Tourism Indicator

Local cultural tourism data indicate the extent to which community members in Saudi Arabia participate in cultural activities outside their cities of residence. This provides an additional factor to be considered in cultural participation indicators. This means that not only do they measure economic benefits generated by cultural activities by stimulating tourism, but they also reflect the demand for several cultural activities, such as visiting museums, art exhibitions, archaeological sites, heritage, and historical places, and attending festivals and cultural events. This is in addition to natural heritage activities such as visiting mountainous places and nature reserves. Cultural tourism data measure tourists' demand for these activities through the number of tourist trips that include one of these activities.

The 2022 Cultural Tourism indicator supports the trend of growth in cultural participation indicated by the Cultural Participation Survey. The number of domestic tourist trips involving cultural activities revealed an increase of more than six million trips from the previous year. It jumped from 11,800,000 in 2021 to more than 18 million trips in 2022.⁽⁸⁴⁾ This growth rate also surpassed the local growth rate for domestic tourism in general. This is

reflected in the increase in domestic tourist trips involving cultural activities, from 19% to 23% of total domestic tourist trips.⁽⁸⁵⁾

As with attendance indicators, growth in domestic cultural tourism applies to all cultural activities. In other words, the number of trips, including visits to museums and art exhibits, increased, as did the number of trips involving any other cultural activity. Tourist trips, including visits to resorts and mountainous areas, had the highest growth rate between 2021 and 2022, reaching 126%. This is more than double the number, from two million trips to four and a half million trips. The number of trips, including a visit to cultural events and festivals, also reflects a continued post-pandemic recovery. It now exceeds nine million domestic tourist trips, constituting 12% of the total domestic tourist trips. Figure 21 highlights the recovery rate for visits to museums and art exhibits, which, for the first time in 2022, exceeded the previous highest point in 2017. This was the only cultural activity that witnessed a decline during the past years to pre-2018 levels. This decline can be attributed to the changes witnessed by the sector because of several museums closing their doors for construction and development works. The number of domestic tourist trips that included visits to museums and art exhibitions in 2022 (until the end of November) reached more than 2,200,000 trips.



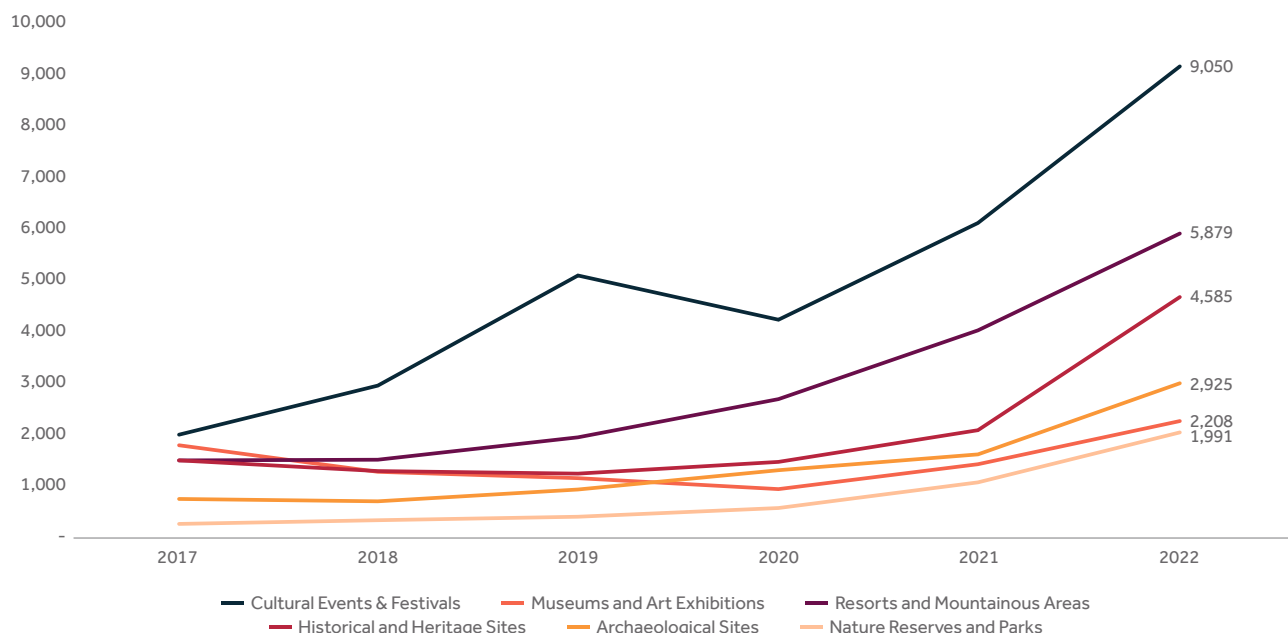


Figure 21: Number of Domestic Tourist Trips Involving Cultural Activities (thousands)⁽⁸⁶⁾

Considering the growth of domestic cultural tourism from 2018 to 2022, the number of trips with cultural activities was noted to have grown annually by 60, i.e., more than double the rate every two years, despite the impact of the COVID-19 pandemic on some cultural activities. Figure 22 shows that visits to nature reserves and parks were the fastest-growing

cultural activity within the context of domestic tourist trips. It grew by 129% over five years, a fivefold increase, which is twice the average growth of other cultural activities. This is followed by visits to archaeological sites, which grew annually at a rate of 82%, bringing the total growth to 328% between 2018 and 2022.

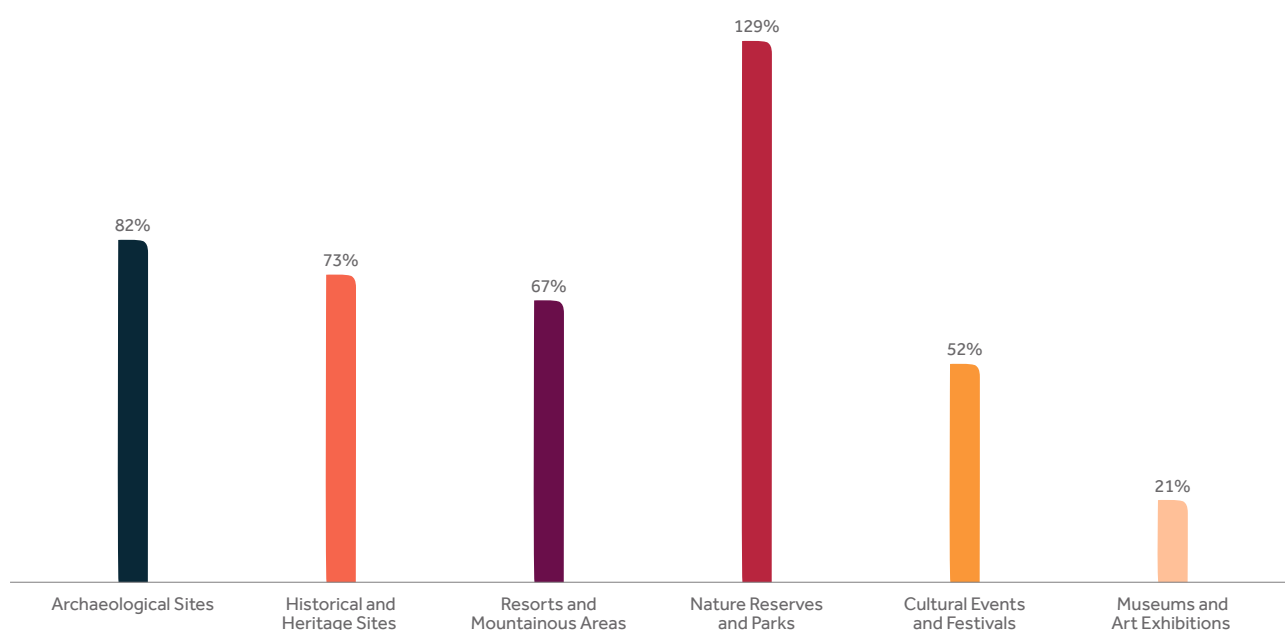


Figure 22: Annual Growth Rates of Domestic Tourist Trips Involving Cultural Activities by Activity, 2018 -2022 ⁽⁸⁷⁾



Even though the weakest growth is observed in domestic tourist visits that include visits to museums and art exhibits, as mentioned above, they still reached their highest levels in 2022. This improvement was driven by the growth of visits to museums and art exhibits in Madinah and Makkah Provinces, where the number of local tourism trips doubled during the



year, which included visits to museums and art exhibits, with a total of 454,000 and 331,000, respectively.

While Makkah Province tops the list (Figure 23), Asir Province comes second in terms of the number of domestic tourist trips, including visits to museums and art exhibitions, where it exceeds 442,000 trips. This is commensurate with the abundance of museums, especially the private ones, in this province.⁽⁸⁸⁾ Madinah, Makkah, and Asir Provinces are also notable for the number of trips that include visits to archaeological sites, as shown in Figure 24. More than two-thirds of visits to archaeological sites (67%) were concentrated within domestic tourist trips in 2022 in these three provinces. Madinah alone had 32% of the total local tourist trips that included visits to archaeological sites, or up to 927,000 trips in 2022.

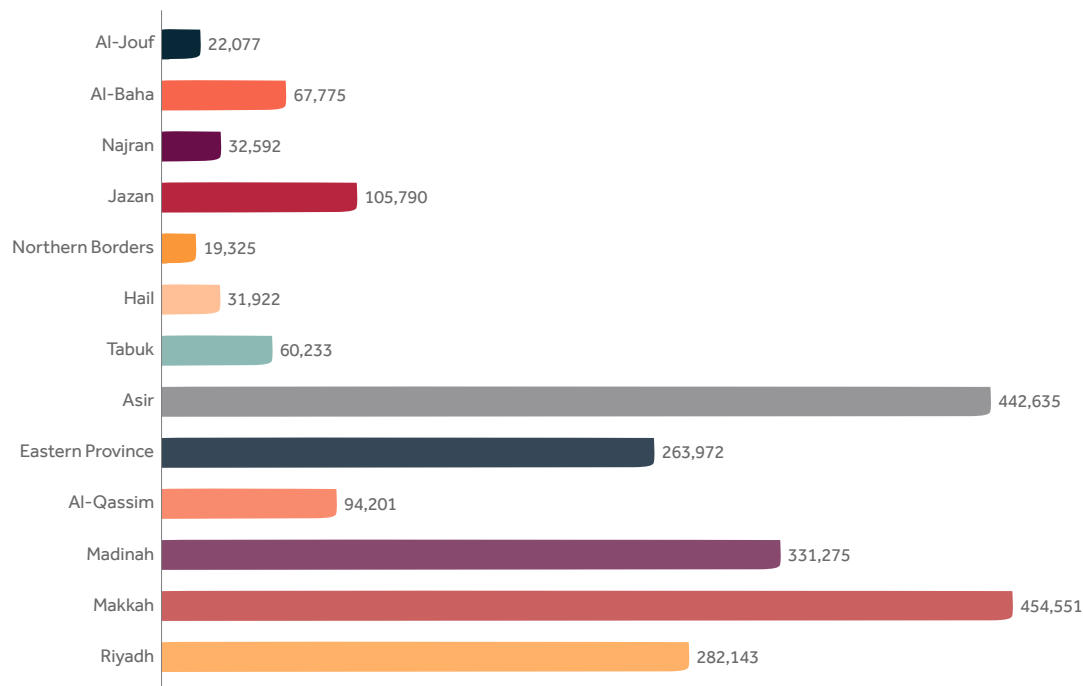


Figure 23: Number of Domestic Tourist Trips Involving Visits to Museums and Art Exhibitions by Province, 2022 (until the end of November)⁽⁸⁹⁾

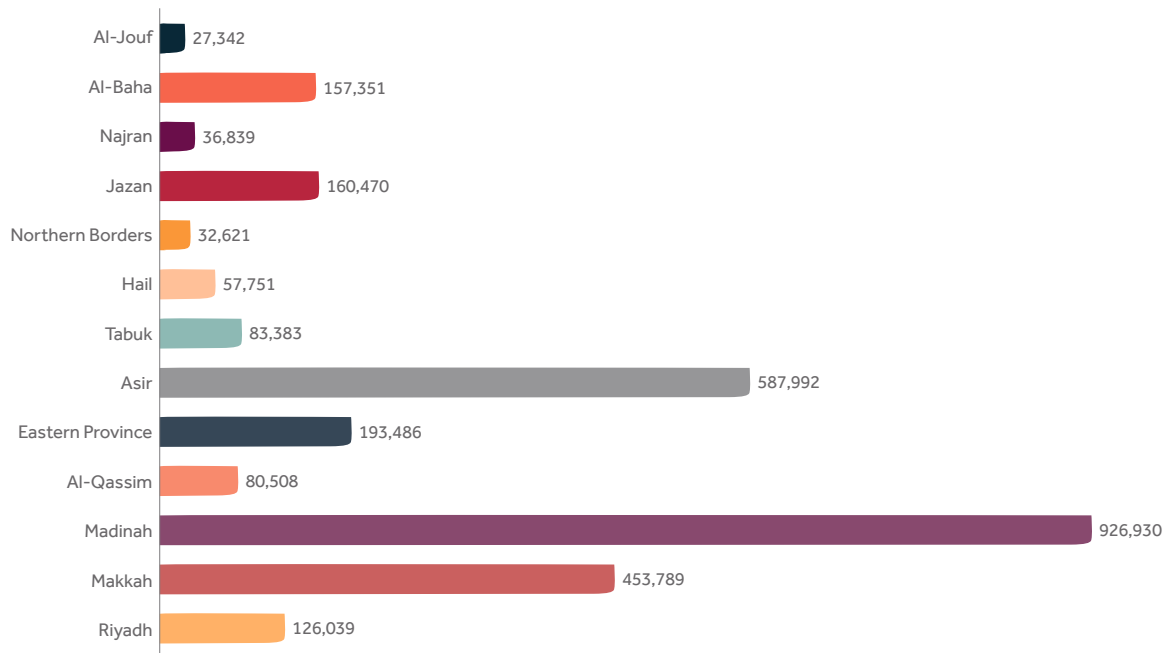


Figure 24: Number of Domestic Tourism Trips Involving Visits to Archaeological Sites by Province, 2022 (until the end of November)⁽⁹⁰⁾

Social Integration Indicator

Social integration, in the context of cultural participation, means a level of engagement in cultural activity that goes beyond mere attendance and visits at the individual level to the active contribution to the cultural field that emerges through institutional work in non-profit community organizations or cultural volunteering.⁽⁹¹⁾ This was the basis for the report for measuring social integration in the cultural sector through non-profit cultural organizations and volunteering in the cultural sector. Considering culture has an inherent social function that is often not related to economic benefit, this sub-indicator is particularly important. It showcases the vital role of the cultural sector and its ability to provide spaces for cultural expression to individuals and groups.

Information from the cultural non-profit sector (NGOs) in 2022 reveals increasing growth after the launch of the sector's strategy in the previous year. While the rise in the number of non-profit cultural organizations has slowed, the number of amateur clubs in the field of culture has nearly tripled compared to the clubs established in 2021. This development paves the way for the fundamental steps required to maintain a strong momentum and help the number of organizations to grow. However, the sector still needs to spread more geographically, as the organizations are currently highly concentrated in Riyadh Province.



Furthermore, some cultural sectors require more non-profit activities, as the organizations and clubs are absent or decreasing in some sectors.

Continued Growth in the Number of Non-Profits

After initially starting to grow in 2019, the number of cultural NGOs continued to grow in 2022. Up until 2018, there were

only eight active cultural NGOs in Saudi Arabia, but this number reached 69, multiplying more than eight times over five years. This growth is part of a broader context connected to the adoption of the Law of Civil Society Associations and Organizations in 2016, as well as the affirmation of Saudi Vision 2030 and its programs to enable the role of the third sector. Cultural NGOs have, therefore, experienced a growth

rate comparable to that of the overall non-profit sector.⁽⁹²⁾ In the case of the cultural ecosystem, the growth coincided more clearly with the MoC's Strategy for the Non-profit Sector in 2021, as indicated in last year's report. Last year, 25 NGOs were established, and this growth continued in 2022, although at a lower rate. The sector added 17 NGOs, with a 33% growth rate (Figure 25).

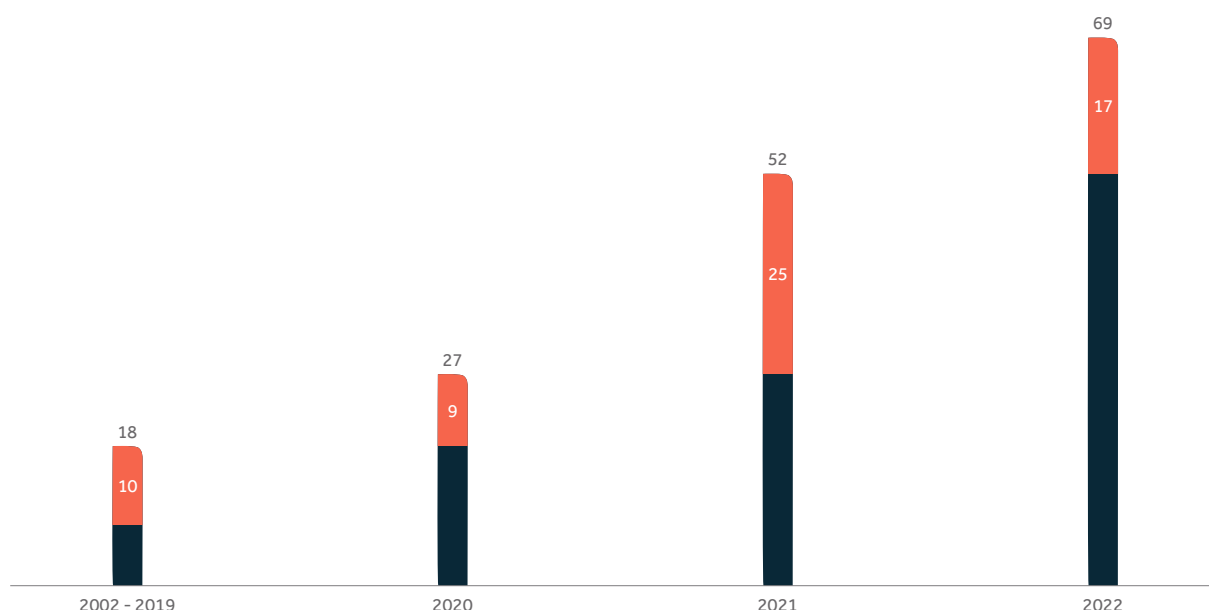


Figure 25: Number of Cultural NGOs⁽⁹³⁾

The growth in the number of cultural NGOs was more evident, with eight new specialized associations being established. However, the notable development in the distribution of types of organizations in the sector came with the establishment of five cooperative societies in performing arts, heritage,

and culinary arts. By the end of 2022, there were six active cooperatives in the sector. Although specialized associations represent 56% of the active institutions, cultural NGOs (Figure 26) have become more diverse in terms of activity, which improves the roles of cultural organizations in the sector.

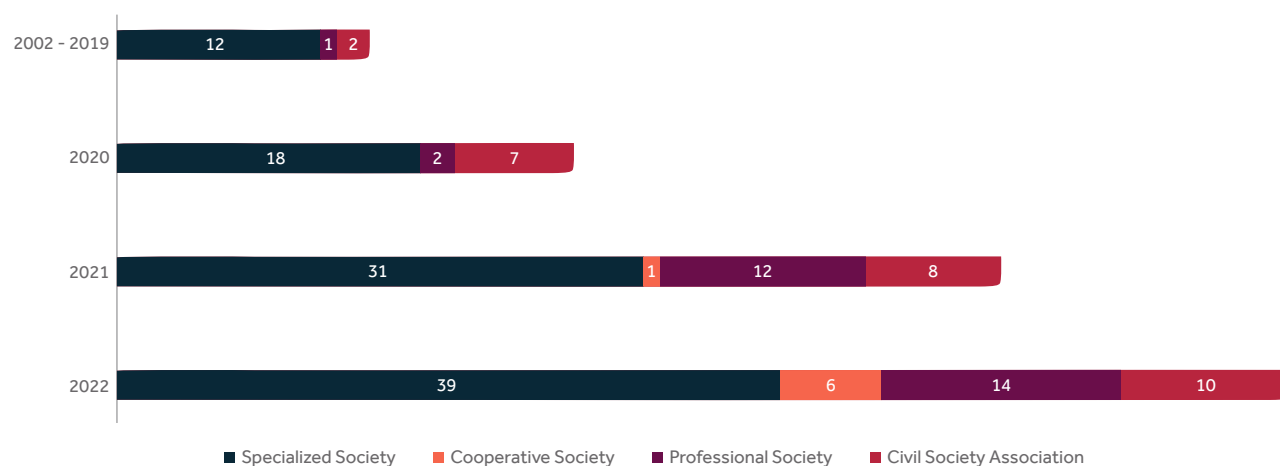


Figure 26: Total Numbers of Active Cultural NGOs by Type until the End of 2022⁽⁹⁴⁾



Geographic and Sectoral Coverage of Cultural NGOs

Nearly half of the total cultural NGOs are active in the heritage sector, with the data showing 30 NGOs until the end of 2022. This is followed by visual arts, theater and performing arts, film, and literature. These are sectors in which five or more organizations operate. The heritage sector also topped the list in terms of the number of organizations established

in 2022, with seven NGOs established, followed by three organizations in the culinary arts sector and two in the visual arts sector. These three sectors witnessed the establishment of more than one organization during the year. All the cooperatives established in 2022 were in the heritage and culinary arts sectors (Figure 28). As for the fashion sector, only one professional organization was established during the year. There are currently no active NGOs in the museum sector in Saudi Arabia.

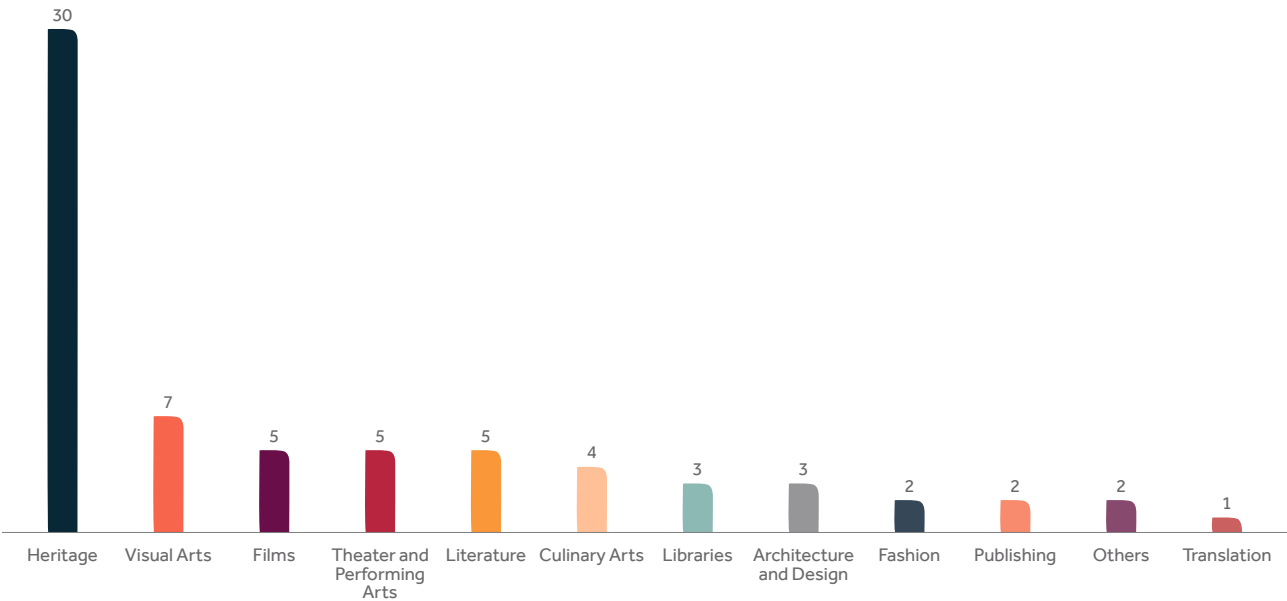


Figure 27: Number of Active Cultural NGOs by Sector until the End of 2022⁽⁹⁵⁾

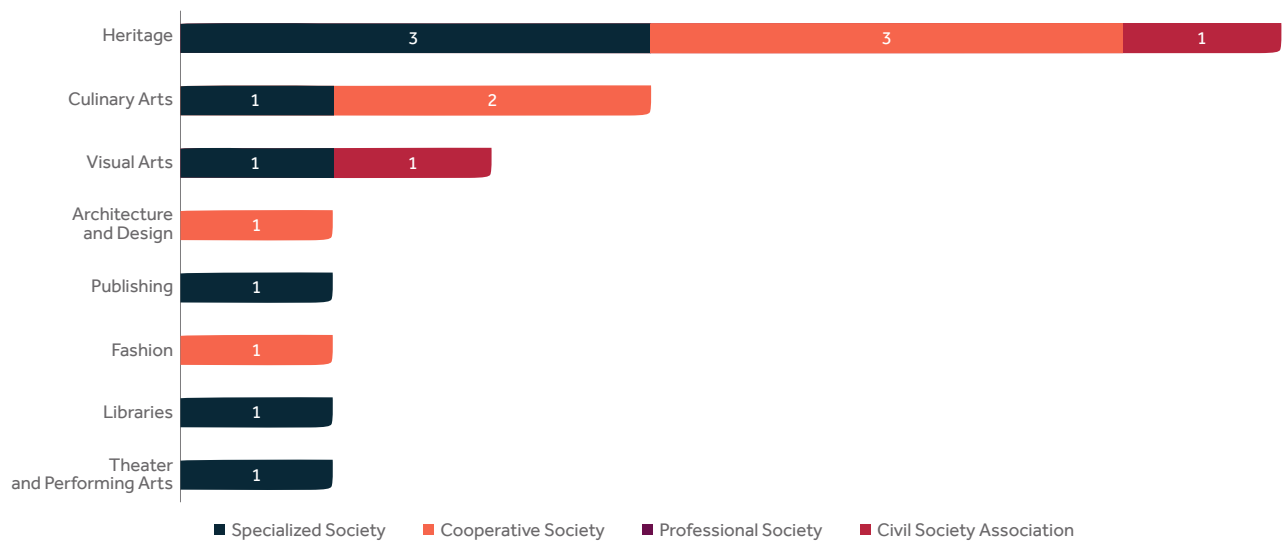


Figure 28: Number of Cultural NGOs by Type and Sector Established in 2022⁽⁹⁶⁾



Regarding the geographical scope, statistics reflect the centralized distribution of the cultural NGO sector in Saudi Arabia, as there are not yet any cultural NGOs in Hail, Tabuk, Northern Borders, or Al-Baha Provinces. The total number of organizations reached 40 by the end of 2022, which are primarily concentrated in Riyadh Province, which alone hosts 58% of the total number. This means an average of nine cultural NGOs per million people in Riyadh Province, compared to the average in the rest of the provinces, which does not exceed 2.4 NGOs per million people. This information (Table 7) shows an increase in the number of NGOs in relation to the population in Al-Qassim Province by five organizations. Eastern and Madinah Provinces came last on the list.

Table 7: Number of Cultural NGOs per Million People.

Province	Percentage
Riyadh	9.0
Makkah	2.6
Eastern Province	1.7
Al-Qassim	5.4
Madinah	1.5
Asir	1.4
Jazan	2.0
Al-Jouf	2.3
Najran	2.5

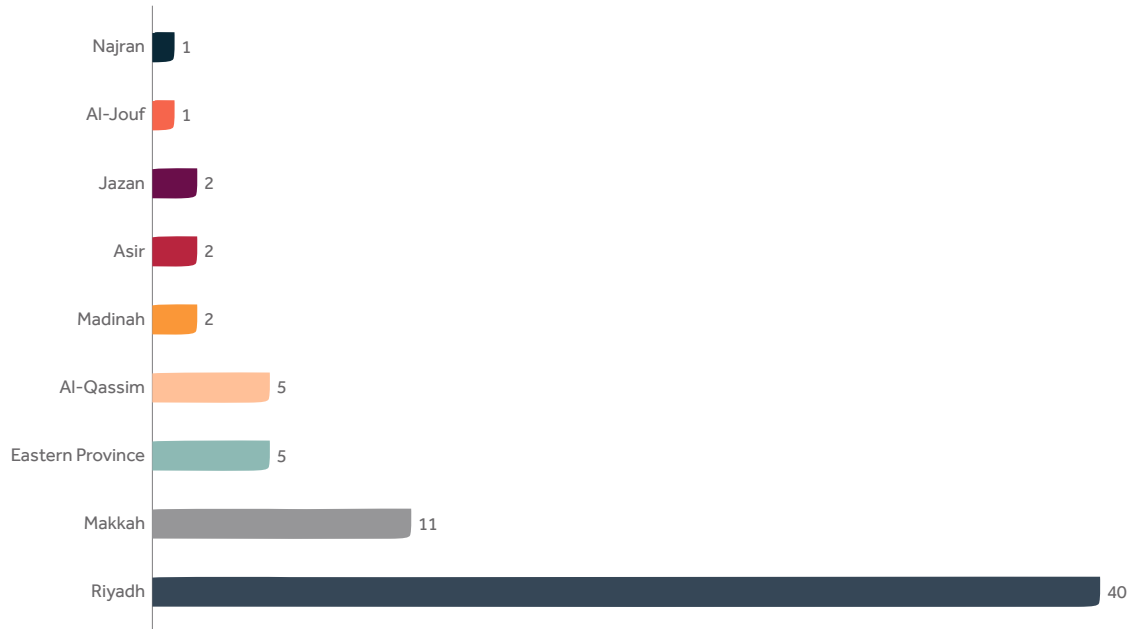


Figure 29: Distribution of Active Cultural NGOs by Province⁽⁹⁷⁾

Except for museums, there is at least one active cultural NGO in Riyadh in each one of the cultural sectors (Figures 30 and 31). Furthermore, there are no active cultural NGOs in the fields of fashion, publishing, translation, and libraries outside Riyadh Province. In contrast, other sectors show more prevalence, such as literature and theater arts. These are fields where cultural NGOs are active in four provinces.

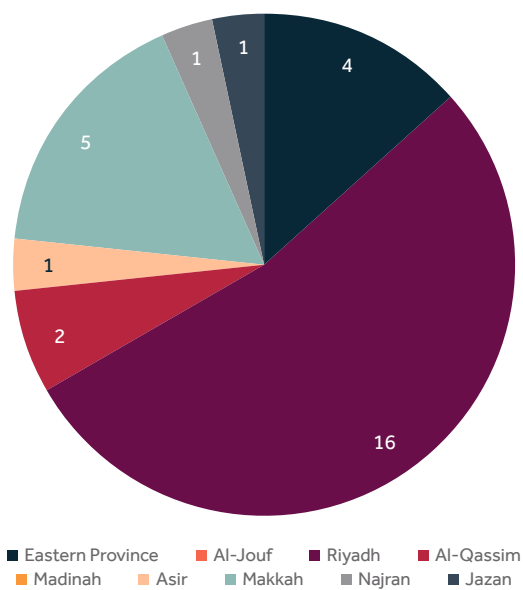


Figure 30: Number of Active Cultural NGOs in the Heritage Sector by Province⁽⁹⁸⁾



Cultural Participation

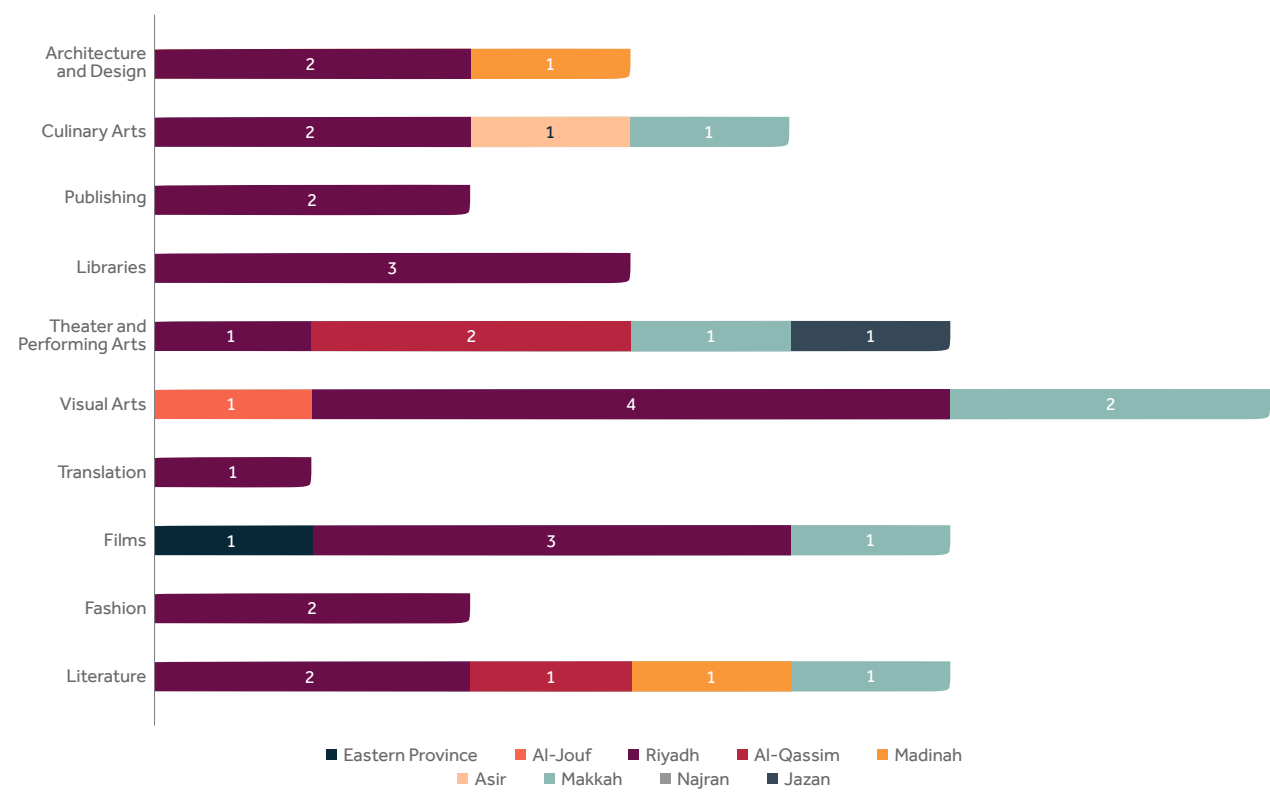


Figure 31: Distribution of Cultural NGOs in Other Sectors by Province⁽⁹⁹⁾



Amateur Clubs

Amateur clubs represent the fifth level according to the classification of cultural NGOs based on the MoC's Strategy for the Non-profit Sector launched in 2021. Amateur clubs made up approximately 65% of the total active cultural NGOs by the end of 2022. This high percentage can be attributed to two causes. The first is the flexible social nature of amateur clubs, which allows engagement in cultural activities in a more spontaneous and less resource-intensive way. This promotes the vital role and presence of culture in daily activities. The second is easy access to "Hawi" (lit. amateur in Arabic), a platform that allows the establishment, registration, and enrollment of amateur clubs.⁽¹⁰⁰⁾ The 2022 statistics indicate demand for the establishment of amateur clubs in the second year. Their number jumped to nearly three times compared to the previous year, with the establishment of 93 cultural amateur clubs in 2022 (Figure 32).

Going into more detail, amateur theater clubs topped the

list at 41% of the total clubs established in 2022, followed by amateur visual art clubs at 15% and literature clubs at 14%. As shown in Figure 33, no amateur clubs were established this year in the museum, architecture, and design sectors. However, if the number of clubs during these two years is compared within each sector separately, the number of theater amateur clubs increased by more than five times their number in 2021, while the number of literary amateur clubs increased by and four times in the same period.

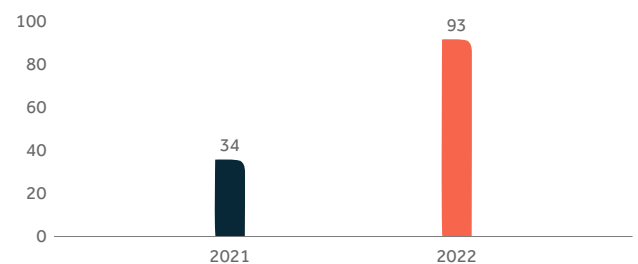


Figure 32: Number of Amateur Cultural Clubs, 2021-2022⁽¹⁰¹⁾

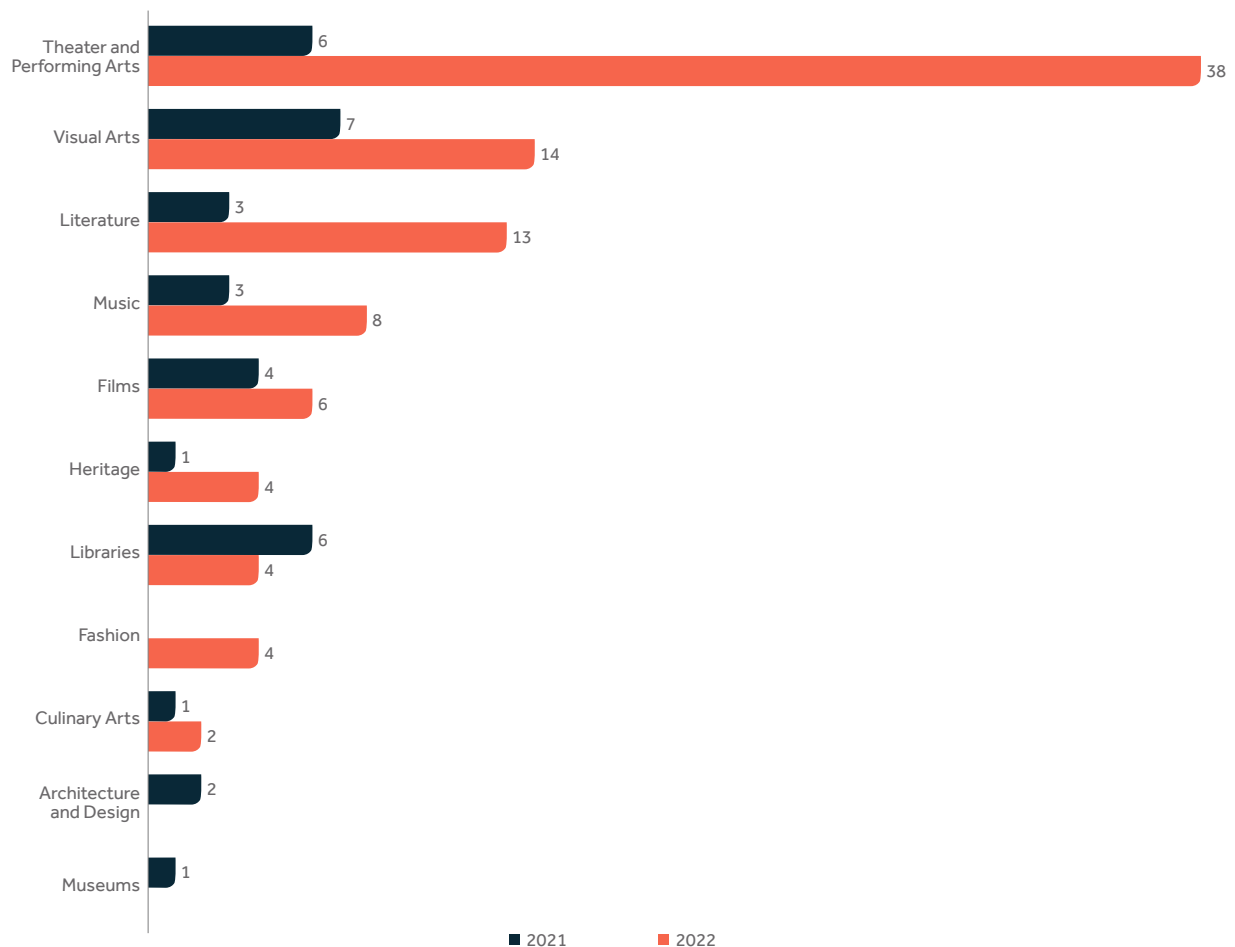


Figure 33: Distribution of Cultural Amateur Clubs by Sector, 2021-2022⁽¹⁰²⁾



At the two distribution levels, sectoral and regional, as Figure 34 shows, amateur theater clubs are active in nine different provinces, led by the Eastern, Riyadh, and then Makkah. Literature amateur clubs are distributed in seven provinces, and approximately two-thirds of them are in Riyadh and Eastern Provinces in equal proportions. Clubs for visual arts and libraries follow. The former is distributed in six different provinces, the highest of which is the Eastern, then Riyadh and Makkah in equal proportions. The latter - that is, the clubs for libraries - is distributed in five regions, two-thirds of which are also concentrated in Eastern and Riyadh Provinces.

As for amateur clubs in the heritage, film, and music sectors, each of them is distributed in four provinces.

Going into detail, 40% of heritage clubs are in Makkah, Riyadh, Eastern, and Madinah Provinces in equal proportions. It is noteworthy that 60% of amateur film clubs are active in Makkah Province, followed by Asir at 20%, with the rest being distributed between Jazan and the Eastern Provinces in equal proportions. Amateur music clubs are in Riyadh and Makkah, totaling 45% and 36%, respectively. Sectors that are active in just one or two provinces are fashion clubs in Eastern and Makkah Provinces, culinary clubs in Eastern and Riyadh Provinces, and architecture and design clubs in Riyadh Province only. The only amateur museum club was in Madinah Province. Comparing the number of amateur culture clubs by province (Figure 35) reveals that Riyadh and the Eastern Provinces take the lead. Each of them has 33 active amateur clubs, which is nearly a quarter of the total amateur culture clubs in Saudi Arabia, followed by Makkah Province with 31 amateur clubs. Asir Province comes fourth with ten amateur clubs, half of which are theater clubs. It is followed by Jazan and Madinah, with six clubs each. Provinces that had only one active amateur club included Al-Baha, Najran, Hail, and Al-Jouf. No amateur clubs were active in Northern Borders Province until the end of 2022.

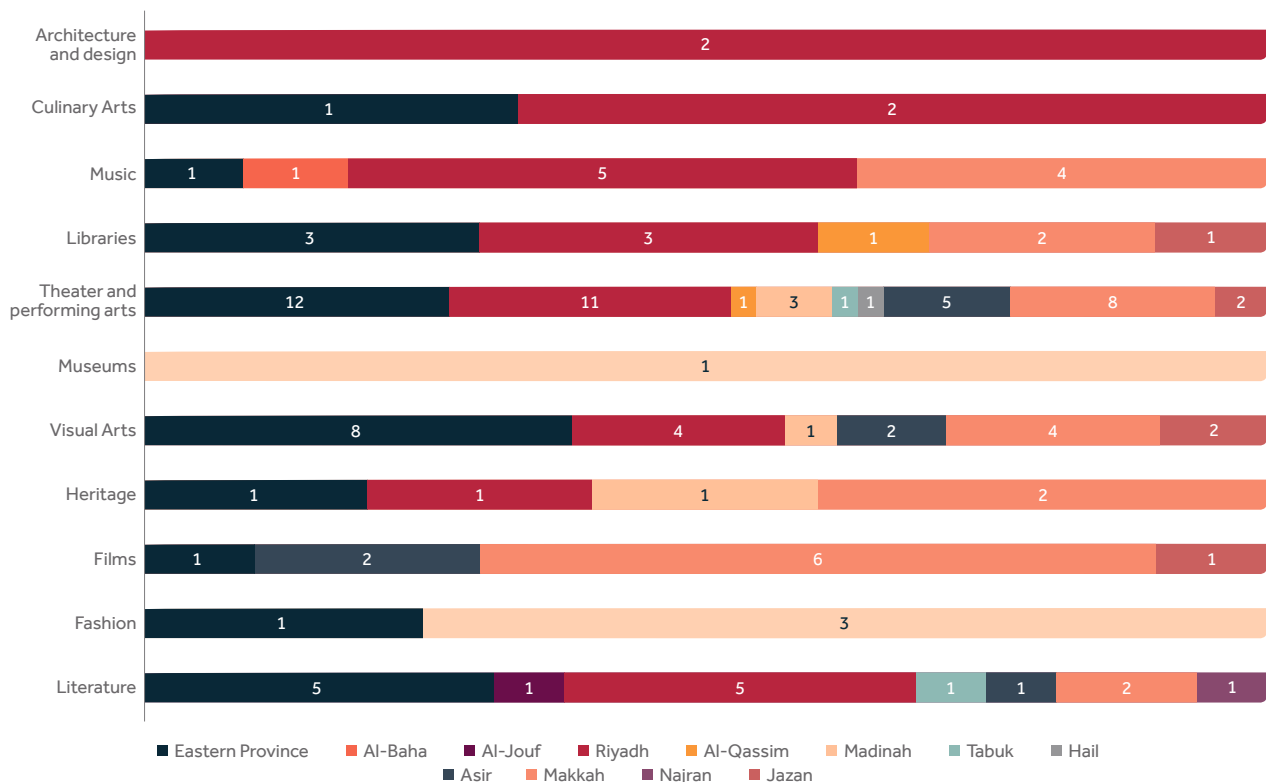


Figure 34: Number of Active Amateur Cultural Clubs by Sector and Province by the End of 2022⁽¹⁰³⁾

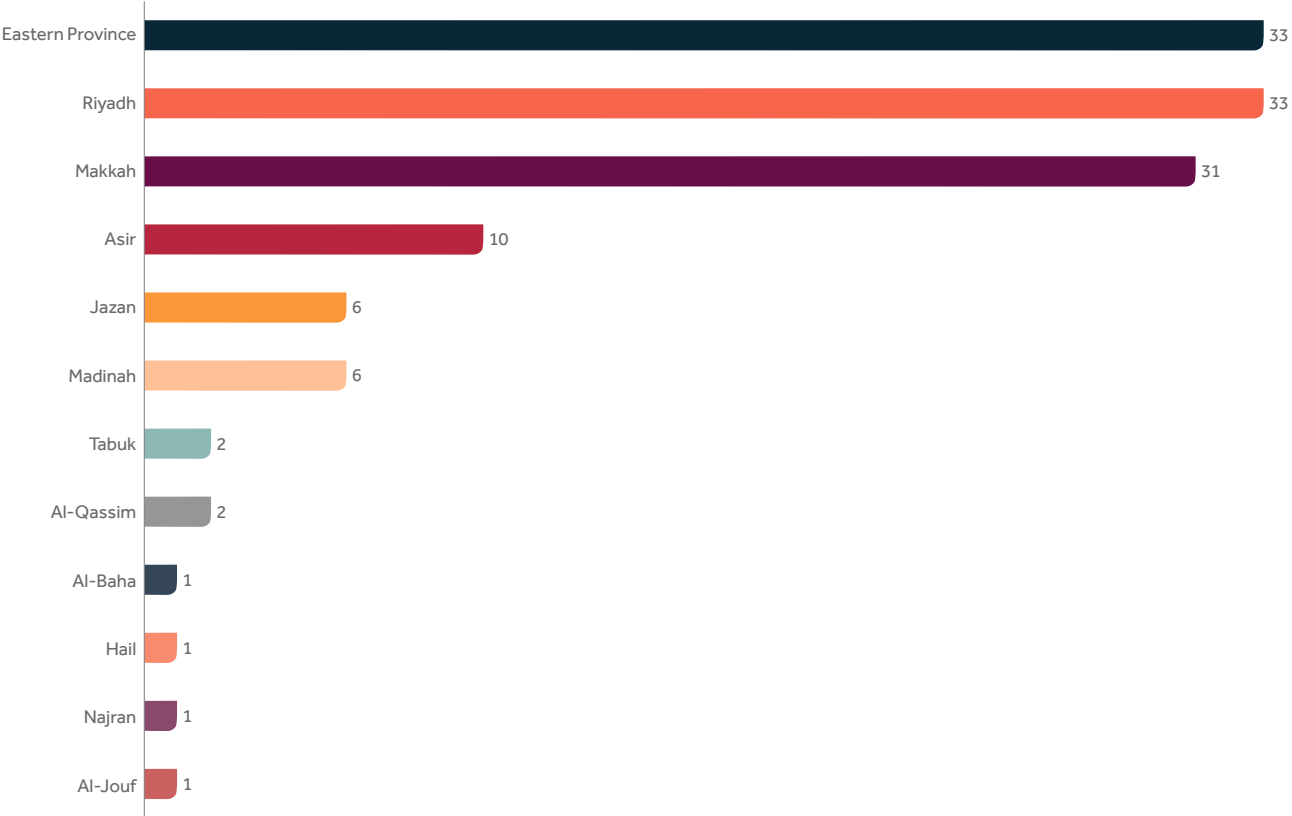


Figure 35: Distribution of Active Amateur Cultural Clubs by Province until the end of 2022⁽¹⁰⁴⁾



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- (71) Data from the Saudi Arabian Society for Culture and Arts (May 16, 2023).
- (72) This number includes repeat performances.
- (73) Data from Ithra (May 08, 2023).
- (74) Data from the Culinary Arts Commission (April 14, 2023).
- (75) National Pavilion of Saudi Arabia, International Art Exhibition, "The Teaching Tree," accessed September 07, 2023, <https://www.saudipavilion.org/ar/art/2022-the-teaching-tree/>.
- (76) Data from the Visual Arts Commission (March 20, 2023).
- (77) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (78) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (79) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (80) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (81) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (82) Ibid.
- (83) See the Creative Economy and Management and Conservation chapters for more details.
- (84) 2022 Cultural Participation Survey (Fourth Iteration). See the Methodology Appendix for details.
- (85) Data from the Ministry of Tourism (March 05, 2023).
- (86) Ibid.
- (87) Ibid.
- (88) See the Management and Conservation Chapter for details.
- (89) Data from the Ministry of Tourism (March 05, 2023).
- (90) Ibid.
- (91) See the Glossary for details.
- (92) King Khalid Foundation, Saudi Non-Profit Trends Report, 2023, accessed September 03, 2023, <https://kkf.org.sa/media/yl2lrc3i/trends2023.pdf>.
- (93) Data from the Ministry of Culture (April 04, 2023). This excludes several amateur clubs, as they are presented independently in the following paragraph.
- (94) Data from the Ministry of Culture (April 04, 2023).
- (95) Ibid.
- (96) Ibid.
- (97) Ibid.

(98) Ibid.

(99) Ibid.

(100) Ministry of Culture, "Report on the State of Culture in the Kingdom of Saudi Arabia 2021: Culture in Public Spaces" (Riyadh, Ministry of Culture, 2021), 120.

(101) Data from the Ministry of Culture (April 04, 2023).

(102) Ibid.

(103) Ibid.

(104) Ibid.

5

Chapter Five

Creative Economy

- Creative Economy: Clarifying the Concept
- People Employed in Cultural Sectors
- Small and Medium Enterprises (SMEs)
- Indicators of Consumption and Expenditure on Cultural Products and Services
- Cultural Tourism
- Determinants of Demand on Cultural Services and Products





Culture-related economies are among the fastest-growing worldwide and are critical to economic development. These economies comprise various industries where economic value is linked to cultural connotations or creative activities. The Creative Economy chapter provides accurate information about these essential sectors to policymakers, entrepreneurs, investors, stakeholders, or anyone interested in culture. It highlights various economic indicators relevant to the cultural sector. These indicators include cultural sector workers, small and medium-sized cultural enterprises, consumption patterns, expenditure on cultural products and services, cultural tourism, and the determinants of demand for cultural products and services.

The year 2022 was marked by the creative economy's continued recovery from the effects of the COVID-19 pandemic under various indicators. Cultural tourism, for example, reached an all-time high and continued to grow rapidly. Spending indicators also showed an increase in 2021 compared to the previous year. This growth trend extended to sectors within the cultural labor market as well. Some subsectors adjusted due to Saudization, resulting in a significant increase in the number of Saudi workers in the sector, especially female workers. By Q2 2022, the cultural sector saw more female than male workers.



Creative Economy: Clarifying the Concept

Creative economy and cultural economy are relatively new concepts, and their precise definitions lack consensus. While some interpretations do not distinguish between both terms and view all cultural activities as an integral part of the concept, including those related to heritage and cultural tourism, others see that culture intersects with the creative economy in some cultural activities and broaden the concept's scope to include software and electronics manufacturing, focusing on innovation rather than heritage preservation.⁽¹⁾ This report adopts an operational definition that aligns with the Ministry of Culture's cultural fields and the frameworks proposed by the United Nations Educational, Scientific and Cultural Organization (UNESCO), viewing the creative economy as economic activities within the sixteen sectors defined by the National Culture Strategy, including those sectors not directly related to creative industries, such as tourism activities at heritage and archaeological sites, which are not required, under the definition, to be innovative and groundbreaking. In addition to the core scope mentioned, the chapter also addresses, within the concept of the creative economy but separately, non-cultural economic activities that intersect with sectors such as food and beverage, clothing production, advertising, those related to culinary arts, fashion design, and other design fields, respectively. Finally, the definition excludes creative activities not highly related to culture, such as software, as well as those activities falling within the realm of media and communication. To summarize, the scope can



be briefly outlined as follows:

- The core scope includes economic activities of a cultural nature in the sixteen cultural fields, which comprise:
 - Creative cultural activities: cultural industries that derive value from innovation.
 - Other cultural activities: activities not necessarily related to innovation or artistic practice but derive value from cultural elements and assets, such as heritage preservation activities and those related to natural heritage
- Non-core scope includes non-cultural economic activities intersecting with the sixteen cultural fields.
- Out-of-scope creative activities: the definition does not include certain creative activities as follows:
 - Non-cultural creative activities primarily involving software, electronic industries, and electronic games.
 - Media and communication activities, such as television, the press, and radio broadcasting.

People Employed in Cultural Sectors

Until recently, cultural activities in Saudi Arabia were not recognized as a significant contributor to economic growth.⁽²⁾ Many people viewed cultural activities as akin to hobbies rather than professional careers that people could rely on to earn a living. This was especially true for cultural fields that depended on the creativity of individuals without the support or recognition of a market for their

work. Examples of such fields include film, theater, and music. Similarly, the creative component received little independent importance in cultural domains connected to industries, such as fashion (linked to the textile industry and clothing sales) and architecture (linked to construction). As a result, occupations closely associated with culture, such as fashion design, were not included in occupational classifications.⁽³⁾

Over the past three decades, there has been a growing recognition worldwide that culture can generate economic value without compromising the other functions of cultural action. The Ministry of Culture's sector strategy has embraced this trend based on Saudi Vision 2030 nationally. As part of broader efforts led by the Ministry of Culture in partnership with other national entities, 138 cultural occupations have been included in the Saudi Standard Classification of Occupations, marking a crucial first step towards granting official recognition to cultural activities within the economic sector. This recognition will enable the cultural sectors to increase their professionalism and access essential information highlighting their contribution to the economy, thereby identifying areas of deficiency and creating development opportunities. However, there is still a long way to go. This issue is not only about amending classifications but also about regulating current jobs in the labor market. The primary focus should be on achieving the necessary growth that creates job opportunities in the first place. This chapter tracks progress, identifies deficiencies, and outlines the baseline.

According to Q3 2022 data,⁽⁴⁾ the number of employees in explicitly cultural professions across various cultural sectors was 181,709. These are jobs directly related to culture.⁽⁵⁾ Figure 1 shows there was an estimated increase of 5.53% in the number of employees in direct cultural professions, primarily attributed to the growth in the number of professionals in the culinary arts, specifically chefs and baristas, both classified as cultural professions.⁽⁶⁾ By the end of Q3 2022, the total number of chefs and baristas was 117,611, compared to 64,098 in other cultural professions combined. In other words, these two occupations accounted for over 64.72% of the workforce in the cultural sector. However, it is worth noting that these two occupations have distinct characteristics compared to the rest of the labor market in the cultural sector. For instance, Saudi participation is only at 9% compared to 25.3% at the national level, while female participation is also lower. After examining the professions of chefs and baristas in detail, the report now focuses on other cultural occupations to take a closer look at workers in other sectors. The workforce of these sectors comprises approximately 64,098 employees,

excluding those in the two professions above. Although this number is similar to the previous year's, there has been a slight decline (Figure 1). However, this decrease is not necessarily a negative trend, as it is connected to structural changes in the job market's regulation. The decline was mainly among non-Saudi employees in core cultural occupations, with a decrease of 3,254 employees (Saudization will be discussed further in upcoming paragraphs). The architecture and design sector, which is one of the most significant cultural sectors in terms of the workforce, accounted for more than half of the decrease in the number of non-Saudi employees, which in turn puts pressure on the total number of employees. However, the relatively new sectors that have recently gained official status in economic activity show high growth rates, which partially explains why they do not undergo the same structural changes as other sectors related to Saudization. This is particularly true for professions in the film and theater sectors, which recorded an average growth rate of 13.7% between 2020 and 2022, with the highest rate exceeding 17% in Q3 2022 compared to Q3 2021 (Figure 3).

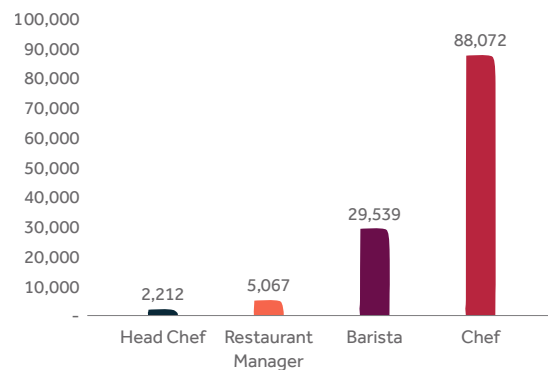


Figure 1: Employees in Cultural Professions, Q3 2021 and Q3 2022⁽⁷⁾

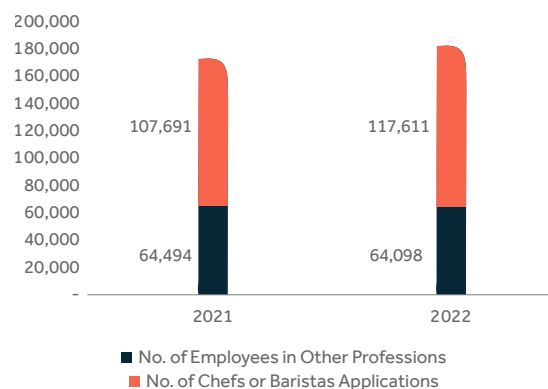


Figure 2: Distribution of Employees in Direct Cultural Professions in the Culinary Arts Sector, Q3 2022⁽⁸⁾

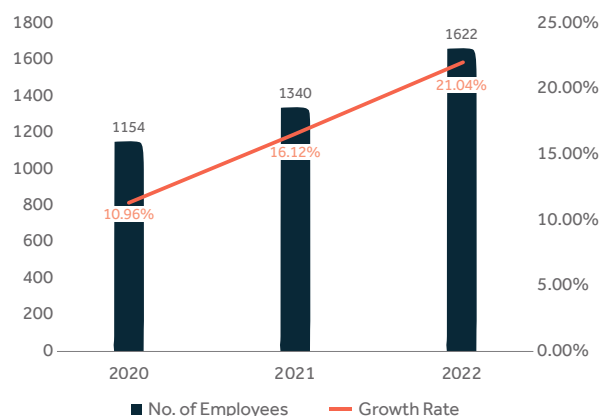


Figure 3: Growth in Numbers of Employees in Film and Performing Arts Sector, 2020-2022⁽⁹⁾

Given the varying nature of the sectors and their stages of development, it is crucial to examine the sub-sectoral components shown in Figure 4. Furthermore, it is also essential to consider examples of professions with higher numbers of employees in some sectors (Figure 5). Notably, cultural professions in the architecture, design, fashion, and culinary sectors comprise the majority of employees in the core cultural professions, accounting for 77% of the total professions. This is likely due to these sectors being linked to large, established economic sectors and enjoying more developed frameworks, unlike the music sector, for example, where many relevant professional roles may still need to be recognized in the records of professions. Aside from the abovementioned sectors, professions in other areas have also become more significant. For instance, translation provided over 5,500 job opportunities for translators and interpreters.

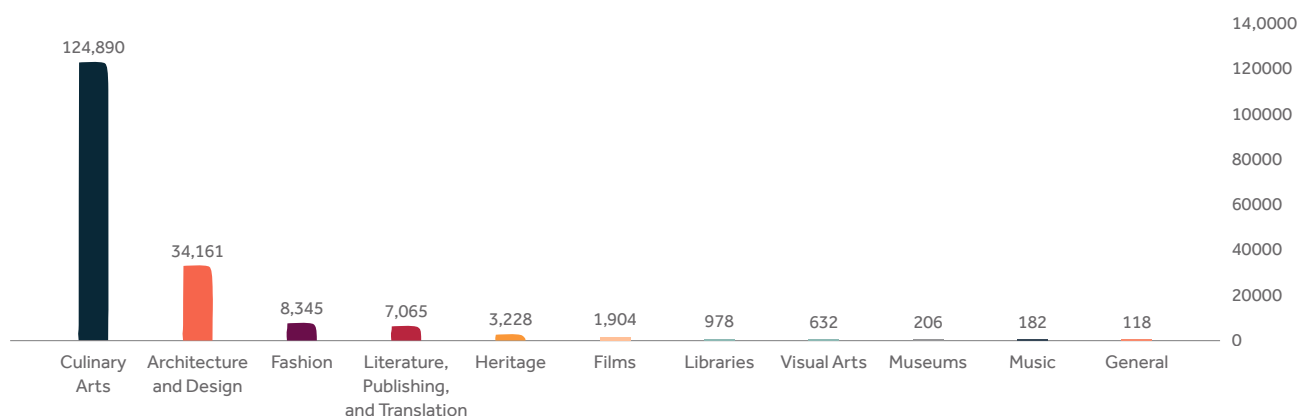


Figure 4: Employees in Cultural Professions per Sector⁽¹⁰⁾

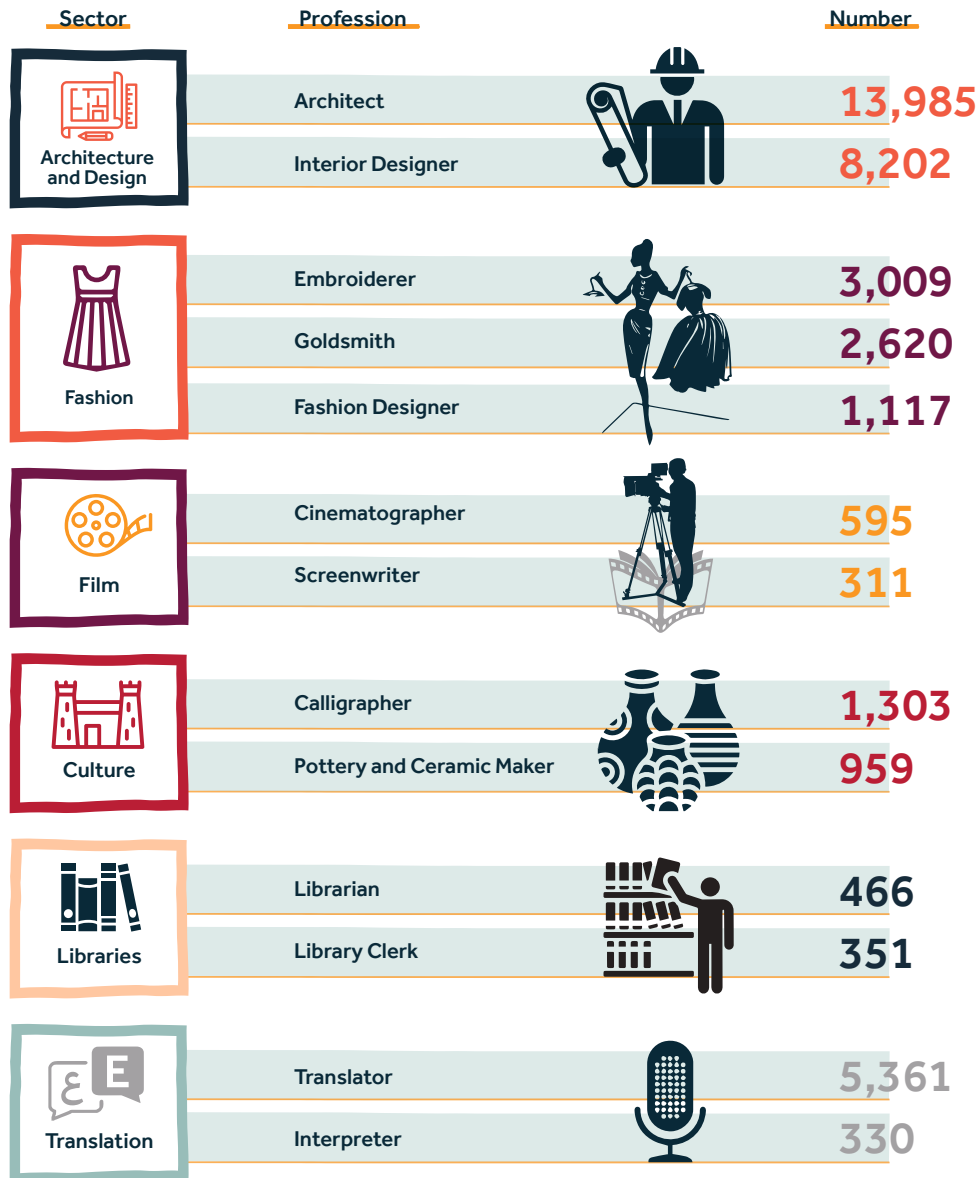


Figure 5: Employees in Certain Cultural Professions, Q3 2022

Generally speaking, the nascent cultural sector in Saudi Arabia has a way to go to develop its contribution to job creation in the national economy. In 2022, only 1.25% of the total labor in the country was employed in the core cultural professions. While this figure may appear to be low, it is essential to note that this calculation of the number of cultural professions is based on a categorization of cultural professions associated with the sector's national definition in the 16 subdivisions. This definition excludes large sectors that are often included in the statistics of cultural and creative professions and those relevant to them, such as media or

technology, or both, as in the statistics of the cultural or creative economy of other countries. Furthermore, the data above include only direct cultural professions, meaning 138 professions are inherently culture-related.

Thus, it is essential to consider the contribution of indirect cultural professions within the cultural sector. According to recorded data, 60,294 professionals work in 78 different professions (Figure 6), which are not typically considered cultural unless they are involved in a specific cultural activity. These professions include carpenters and painters, which are not considered cultural professions unless practiced within

a commercial activity related to the restoration of heritage and archaeological buildings. Most of these professions are in the culinary arts and fashion sectors, where approximately half of the registered employees are chefs (Figure 7).

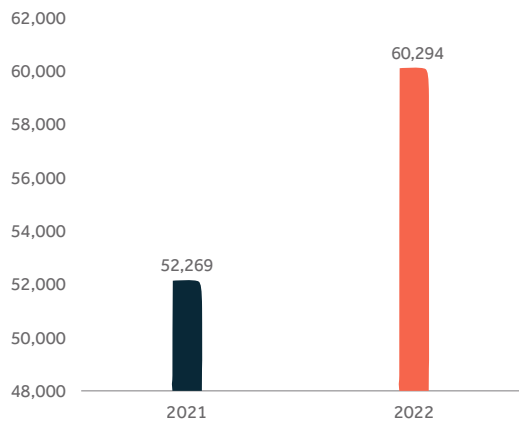


Figure 6: Employees in Indirect Cultural Professions, Q3 2021 and Q3 2022

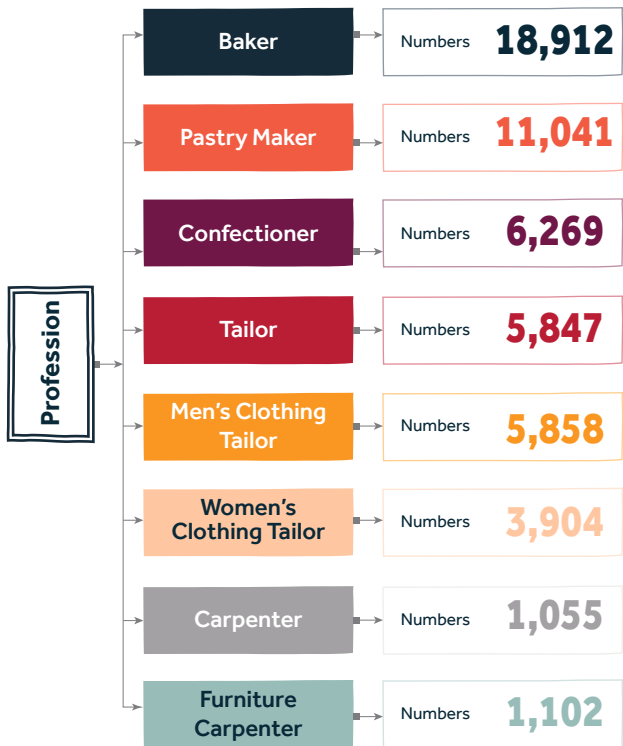


Figure 7: Employees in Some Indirect Cultural Professions, Q3 2022⁽¹¹⁾

Indirect cultural professions are a crucial source of growth and enhancing the contribution of cultural activities to the labor market. These professions have seen a growth of over 13.31% in Q3 2022 compared to Q3 2021. This provides a more comprehensive measure of the cultural sector's impact on job creation. The total number of workers in cultural professions, both core and non-core, is 242,003 employees, accounting for 1.7% of the Saudi labor market.

Geographical Distribution of Employees in Cultural Professions

The recorded data show that most job opportunities in cultural professions are in Riyadh, Makkah, and the Eastern

Provinces (Figure 8), with Riyadh Province alone accounting for 44% of the total cultural workforce. This distribution is not simply due to the workforce size in these provinces but rather indicates an increase in job opportunities filled there. However, it reflects an increase in job opportunities filled there, even when the total number of workers in these provinces is considered. In the three provinces with the major cities, 64 of every 10,000 workers hold cultural professions, versus an average of 39 in the rest of the provinces. This is nearly half the rate of the number of cultural positions in Riyadh, Makkah, and Eastern Provinces. This rate is at its highest in Makkah Province, where 78 of every 10,000 workers hold cultural professions, followed by Riyadh and Madinah. However, this rate is significantly lower in Najran and the Northern Borders Provinces.

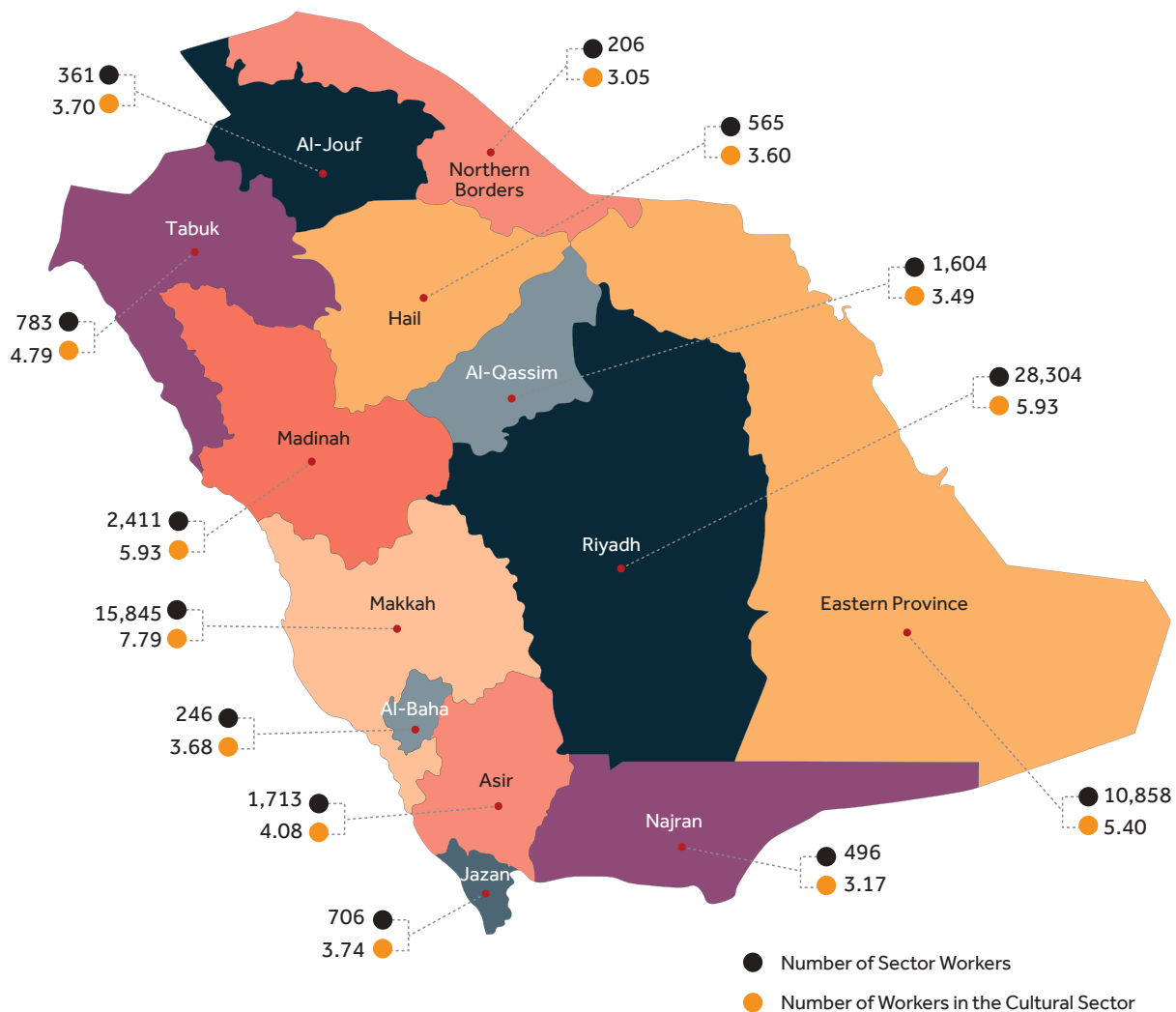


Figure 8: Distribution of Workers per 10,000 People in the Cultural Sector⁽¹²⁾ by Province in Q3 2022⁽¹³⁾

Even though this relative disparity in the distribution of cultural professions aligns with a general link between creative activities and major cities, the 2022 labor data support the findings of last year's report, which suggested that some cultural activities related to heritage and cultural tourism may provide competitive opportunities and advantages outside the provinces with major cities. This is evident in the direct cultural professions of the heritage sector, where the percentage of employees in the heritage sector vis-à-vis the total labor is higher in the provinces of Hail, Madinah, and Tabuk than in other sectors (Figure 9) but not in Riyadh and Makkah Provinces.

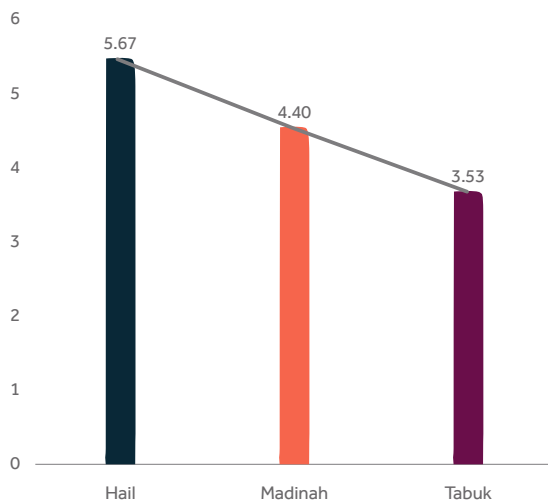


Figure 9: Employees per 100,000 People in the Heritage Field in Higher-Rate Provinces in Q3 2022⁽¹⁴⁾

Demographic Characteristics of Employees in Cultural Sector: Distribution of Cultural Professions by Gender and Nationality

A high percentage of female workers characterizes the cultural sector. In Q3 2022, the number of Saudi women working in cultural professions exceeded that of Saudi men, with a participation rate of 51%, which is an increase compared to the same quarter in the previous year, where it was 47%. Moreover, in both 2021 and 2022, the rate of female involvement in cultural sector professions was higher than their general involvement in the overall labor market, which stood at 37% in Q3 2022. The data show that these high rates are backed by a growth in the percentage of Saudi female workers in cultural professions (27%), exceeding the growth in the number of Saudi male workers in these professions (10%). The high rate of female involvement in the cultural sector is also reflected in the overall growth of female workers in different professions. This includes the growth in the number of non-Saudi female workers of 16%, though in limited figures, as this category includes at most 1,940 female workers in all sectors.

However, an overview of the sector, not limited to the share of Saudi female workers in the national workforce, indicates that, in Q3 2022, the percentage of female involvement as a proportion of all workers in the cultural professions was 18% of the total workers in the sector, close to the overall labor market rate (19%) in the same period. This is due to the fact that in large cultural sectors, in terms of the number of workers, male workers, particularly non-Saudi, take up the majority of professions. For example, the architect profession has the highest contribution to the cultural



professions labor market, while the percentage of female architects amounts to only 10% of total architects. The same applies to professions like chefs in the culinary sector and jewelers in fashion, where the rate of female involvement

is meager. On the other hand, female engagement is evident in a number of design fields, such as interior design and graphic design, where they comprise the majority of workers (Figure 10).

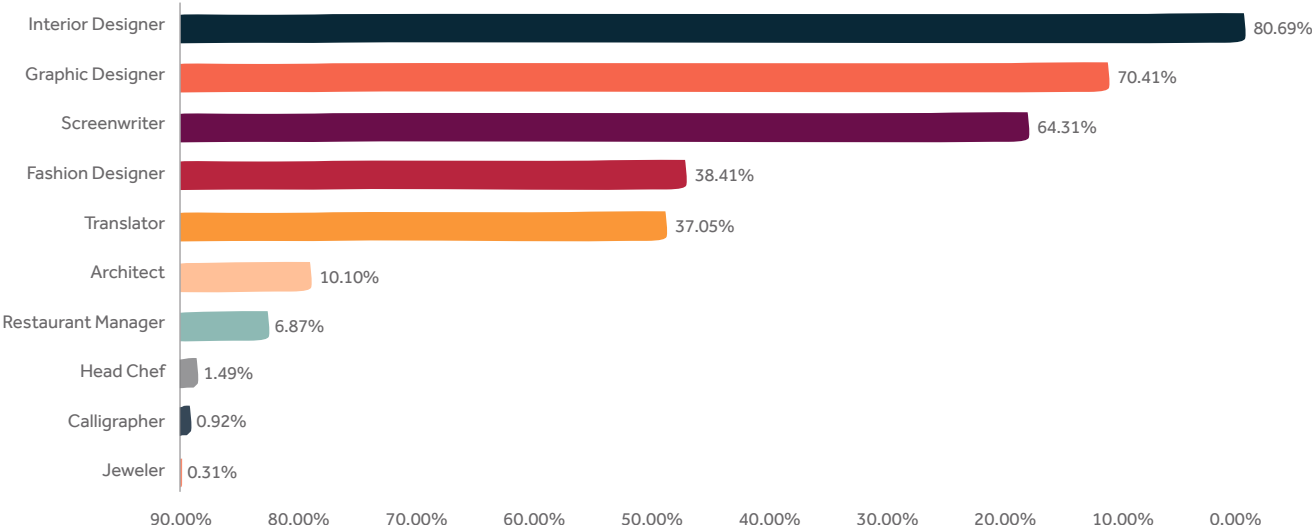


Figure 10: Female Engagement in Saudi Workforce in Several Direct Cultural Professions, Q3 2022⁽¹⁵⁾



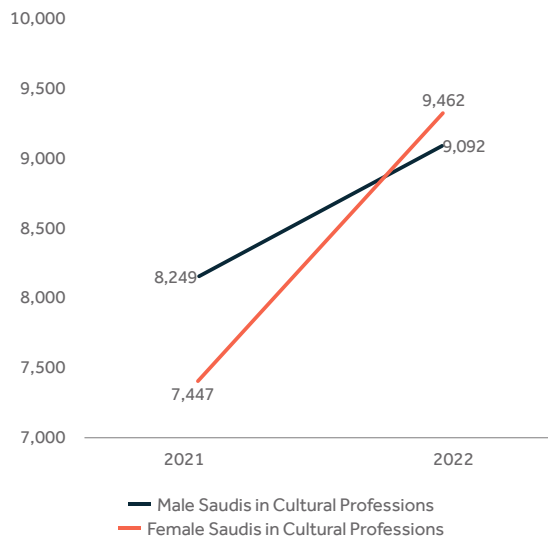


Figure 11: Workers in Direct Cultural Professions within the Saudi Workforce⁽¹⁶⁾ by Gender, 2021-2022⁽¹⁷⁾

Saudization of Cultural Professions

Female participation in direct cultural professions has increased, but the number of male workers in the sector has decreased due to a decline in non-Saudi male workers by 7%. This trend impacts overall growth, as non-Saudi male workers comprised 68% of the cultural sector workforce in 2022, reflecting a downward trend from 73% in the same quarter of 2021. This indicates a decline in non-Saudi workers, but there is growth in the number of male and female Saudi workers, suggesting an increase in the Saudization of cultural sectors.

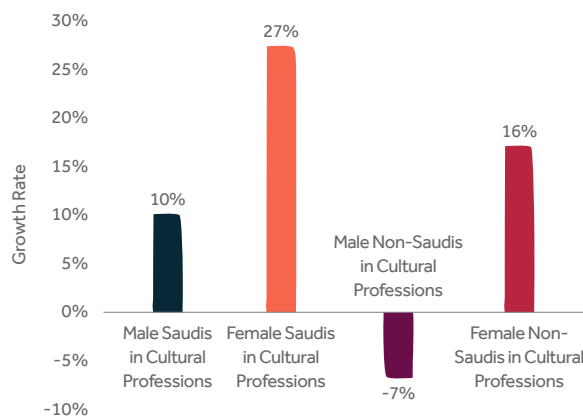


Figure 12: Growth Rates of Number of Workers in Direct Cultural Professions,⁽¹⁸⁾ 2021-2022⁽¹⁹⁾

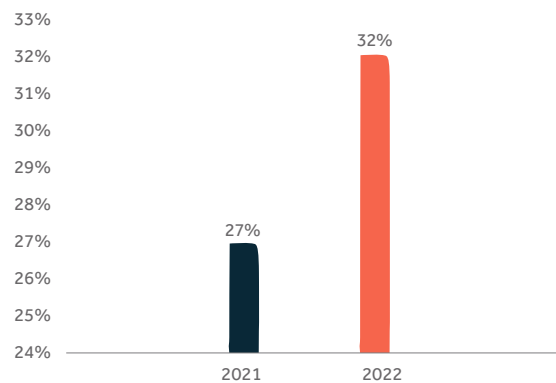


Figure 13: Rate of Saudi Workers' Involvement in Direct Cultural Professions⁽²⁰⁾

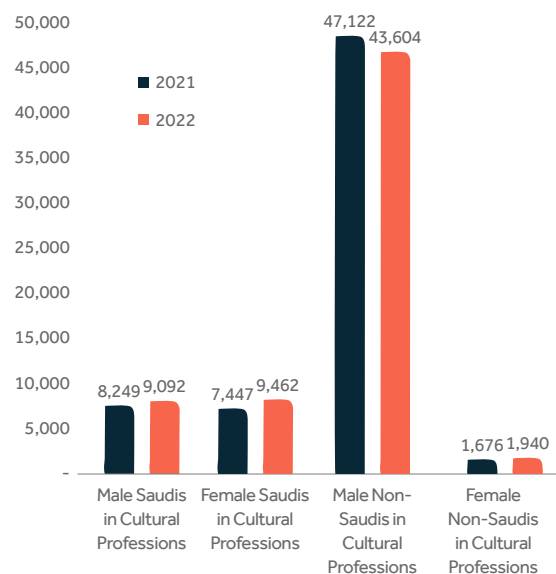


Figure 14: Workers in Direct Cultural Professions⁽²¹⁾ by Gender and Nationality, 2022⁽²²⁾

Small and Medium Enterprises (SMEs)

Importance and Classification of SMEs in the Sector

While SMEs play a crucial role in any economy in general, their significance in the cultural sector is even more critical since SMEs comprise most cultural sector enterprises in most countries and are closely linked to the sector's nature and structure. This is because innovation, often associated with smaller enterprises, is at the core of the cultural sector. Unlike larger commercial enterprises⁽²³⁾ in Saudi Arabia, these SMEs have a competitive edge in creating new products and services. At the policy and program levels, it is recognized that the development of SMEs, as a vital component of the structure of the national economy, is significant in all sectors, including the cultural sector, whose enterprises receive support from the Small and Medium Enterprises General Authority (Monsha'at), as well as sector-specific sources of support, such as the Cultural Development Fund (CDF), which counts SMEs as one of its principal beneficiaries. SMEs can be classified into three categories based on size: medium enterprises have 50-249 employees or an annual revenue of SAR 40-200 million; small enterprises have 6-49

full-time employees or an annual revenue of SAR 3-40 million. Conversely, micro-enterprises have fewer employees and smaller annual revenues than the above two categories.

About 11,850 small, medium, and micro-sized cultural enterprises are operating in Saudi Arabia, with micro-sized enterprises making up around 75% of them. Medium-sized enterprises make up only 3%, with 392 enterprises. This relative distribution differs from that at the level of the national economy as a whole, where SMEs make up a higher proportion of the cultural sector than other sectors (Figures 15 and 16). Most of these enterprises of all types are in Riyadh, Makkah, and the Eastern Provinces, while the remaining 25% are spread throughout other provinces (Figure 18). Compared to other sectors, there are more SMEs in Makkah Province, which is consistent with the high concentration of the sector's workforce mentioned earlier.

It is important to note that the distribution of different types of enterprises is not uniform, with larger enterprises being more prevalent in major cities. For instance, 53% of medium-sized cultural commercial institutions are registered in Riyadh Province, while only 9% are registered in the ten other provinces that have no large cities. This suggests that most SMEs in the cultural sector operate outside major cities. However, it is crucial to address the geographical distribution to determine how these businesses can benefit from support programs, as outlined in the following paragraph.



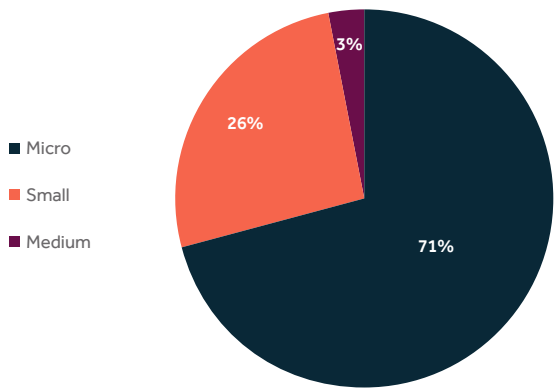


Figure 15: Relative Distribution of Enterprises in the Cultural Sector⁽²⁴⁾

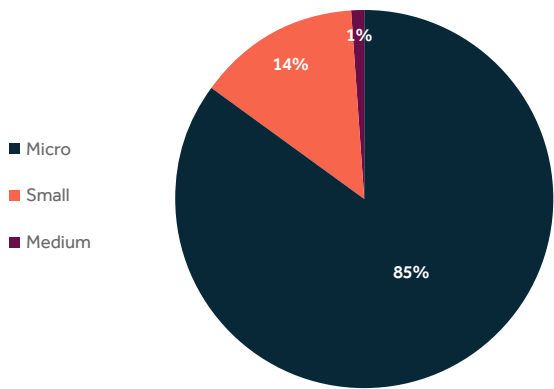


Figure 16: Relative Distribution of Enterprises at the Level of National Economy⁽²⁵⁾

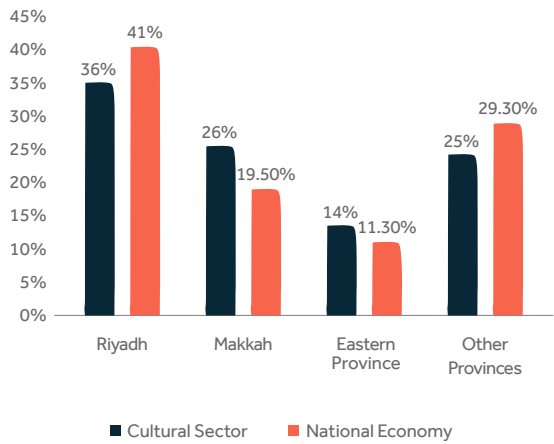


Figure 17: Relative Distribution of Enterprises in the Cultural Sector by Province at the Level of National Economy⁽²⁶⁾



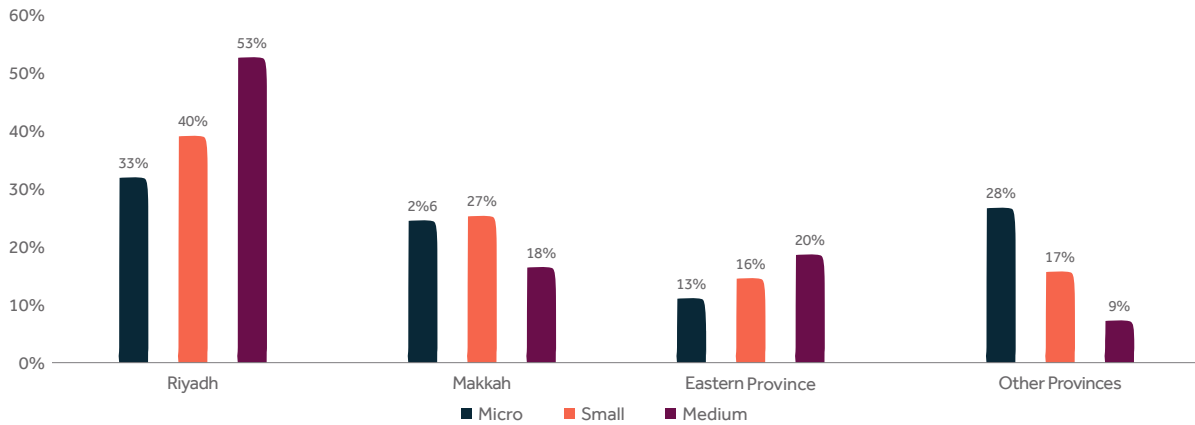


Figure 18: Distribution of Small, Medium, and Micro Cultural Enterprises by Province⁽²⁷⁾

Supporting Cultural Field SMEs

SMEs face numerous challenges throughout their life cycle that determine their viability. Despite their dynamism and potential to generate value through innovation, they are at a higher risk of crashing out of the market due to several factors, such as limited resources, funding, expertise, or inability to adapt to economic changes. Therefore, supporting SMEs is crucial to maximizing their potential economic contribution. This is particularly important in the cultural sector, which is an emerging sector in many of its fields, where small enterprises face additional challenges. Several organizations support enterprises in the cultural sector, with the CDF being one of the most notable ones. Founded in 2021, it has already funded 68 small, medium, and micro-sized cultural enterprises, totaling SAR 61 million by the end of 2022.

As far as non-financial support, Monsha'at offers various services like training, consultancy, and facilitation of businesses⁽²⁸⁾ for the development of SMEs in Saudi Arabia. This support is also extended to SMEs working in the cultural sector. Since its inception in 2016, Monsha'at has provided non-financial assistance to 2,257 cultural SMEs. Support distribution is proportional to the number of enterprises in the sector, including micro, small, and medium-sized businesses. Monsha'at provided this support in response to 2,534 support requests from enterprises (Figure 19), i.e., 90% of the requests or 20% of the enterprises in the entire sector, meaning one in five SMEs received assistance when requested. However, there is a variation in this percentage across provinces. In Riyadh City, 26% of SMEs in the cultural sector received support, whereas, on average, only 15% of comparable businesses in other provinces received similar support (Figure 14). This gap is not a result of inconsistency in offering grants but rather the percentage of enterprises that requested support. In Riyadh, one in three enterprises asked for support; in other provinces,

only one in seven requested assistance. This highlights the need for greater accessibility, which is one of the primary challenges facing the Saudi cultural sector (Figure 20).

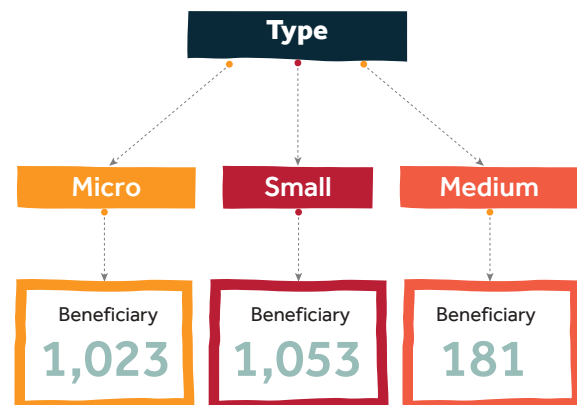


Figure 19: Enterprises Benefiting from Support by Type⁽²⁹⁾

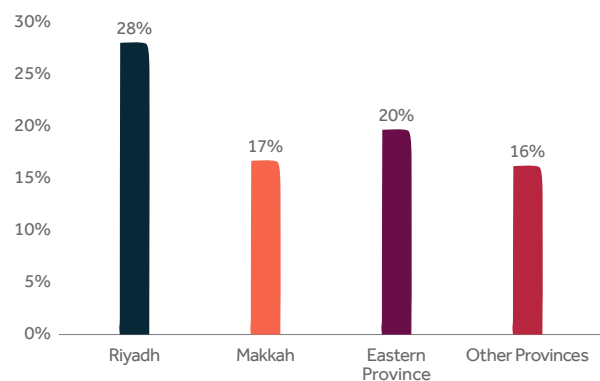


Figure 20: Percentage of Small, Medium, and Micro Enterprises requesting Support as a Proportion of Total Enterprises in the Cultural Sector by Province⁽³⁰⁾

Indicators of Consumption and Expenditure on Cultural Products and Services

Rate of Household Expenditure on Cultural Activities, Commodities, and Services

The latest household consumer expenditure data, "Preliminary Estimates for 2021", show a significant recovery in the expenditure rate on leisure, recreational, educational, and cultural services. There has been a growth rate of 22.8% compared to 2020. The COVID-19 pandemic caused the lowest rate in these sectors, as indicated in the 2021 Report on the State of Culture. In 2021, household expenditure on leisure, recreational, and cultural services reached SAR 137.6 billion compared to SAR 112 billion in 2020. However, the expenditure indicator had yet to recover its pre-COVID rates by the end of 2021. Household expenditure on leisure, education, and cultural services was at its highest rate in 2019, lower than the 2021 statistics (Figure 21).

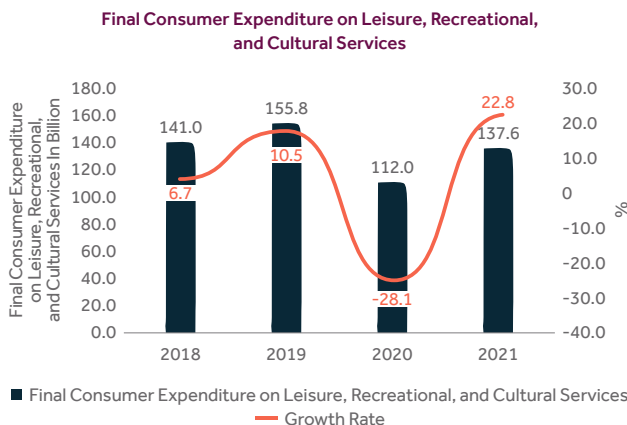


Figure 21: Final Household Consumer Expenditure in the Local Market on Leisure, Recreational, Educational, and Cultural Services⁽³¹⁾

Sales Value of Culture and Leisure Points of Sale

The points of sale (POS) consumption indicator shows the strength of demand. POS here refers to physical locations where cultural and leisure products are sold, such as cinemas and art exhibitions. These locations are essential centers for distributing and consuming cultural and leisure products, providing benefits to both manufacturers

and consumers. Payment methods for these products and services vary, including digital and cash payments and POS transactions. In 2022, POS transactions in the entertainment and culture sector amounted to approximately SAR 14.8 billion, with a growth rate of 4.9%, compared to SAR 14.1 billion in the previous year. The leisure and culture sectors accounted for about 2.6% of total POS sales (Figure 22).

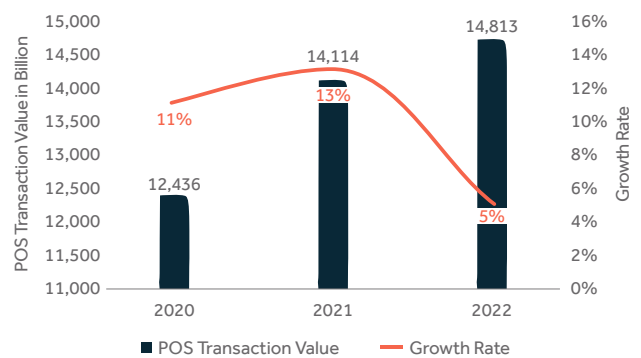


Figure 22: Value of POS for Culture and Entertainment Activities⁽³²⁾

There has been a significant increase in the value of sales transactions in the culinary arts sector, specifically in cafés and restaurants, with an estimated growth of 25.5%, followed by clothing and footwear, at a growth of 10.5%. Restaurants and cafés represent 14.1% of the total POS transactions, while the clothing and footwear sector represents 7.5% (Figure 23). The year 2022 has witnessed the highest value of POS transactions for leisure and cultural activities, restaurants and cafés, and clothing and footwear, based on recorded data during 2019-2022 (Table 1).

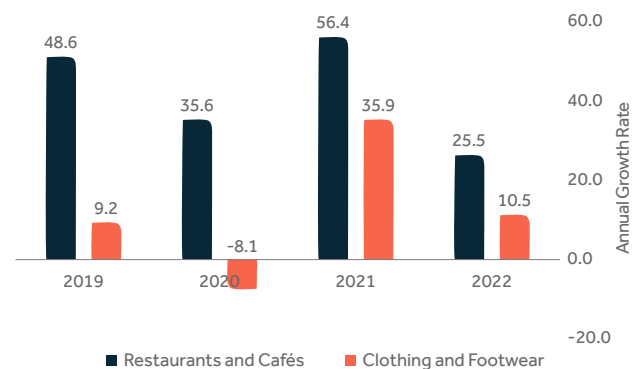


Figure 23: Growth Rate of Sales Transactions for Restaurants, Cafés, Clothing, and Footwear, 2019-2022⁽³³⁾

Table 1: Value of POS for Restaurants, Cafés, Clothing, and Footwear (SAR Billion), 2019-2022⁽³⁴⁾

Year	Restaurants and Cafés	Clothing and Footwear
2019	29,550	30,530
2020	40,060	28,057
2021	62,648	38,130
2022	78,631	42,148

Movie Theater Revenues

Film screenings are among the most significant cultural services and products on which consumers spend money. They are also one of the most important and fastest growing activities in terms of their contribution to the economy due to the newly developed and thus unsaturated market and the expansion in the number of movie theaters, which are yet to cover all Saudi provinces.⁽³⁵⁾ In 2022, revenues from film screenings in Saudi Arabia exceeded SAR 900 million. Despite the slow revenue growth in 2022 compared to 2021 (4% compared to 10%), ticket sales maintained their 10% growth as in the previous year, with total sales reaching 14 million tickets. This growth is also associated with an increase in the number of movie theaters, at 58%, with 22 new movie theaters and 178 new screens (Figure 24).



Figure 24: Cinema Revenue and Sales (SAR Thousand)⁽³⁶⁾

General Inflation Index⁽³⁷⁾ (Leisure and Culture)

Inflation is one of the macroeconomic indicators through which the change in the price of commodities and services is measured during a set period. It offers a perception of increased local demand, which in turn leads to higher and changing prices for commodities and services. In 2022, Saudi Arabia ranked third among G20 countries, following Japan and China,⁽³⁸⁾ in terms of inflation rates at 2.7%. Given commodity prices in the leisure and culture industry, the index recorded inflation at approximately 2.7% (Figure 25). In 2022, the restaurants and hotel businesses sectors recorded inflation of 5.1%, while the clothing and footwear sector shrank by 1.3%.

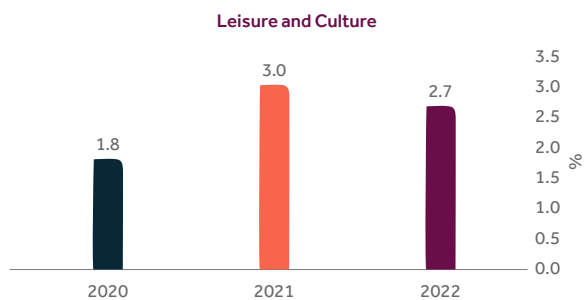


Figure 25: Inflation Rate in the Leisure and Culture Industry⁽³⁹⁾



Cultural Tourism⁽⁴⁰⁾

Many cultural resources and services are closely linked to tourism activity, as the growth of tourism reflects positively on demand for services such as cultural events, art exhibitions, and heritage sites. Moreover, cultural resources and assets attract tourists; hence, the economic impact of culture can be seen in the indicators of tourism, particularly indicators directly linked to cultural tourism, namely tourist trips involving cultural activities. For the past few years, these indicators have shown positive signs of steady growth, reflecting a promising contribution of cultural activities to tourism and, in turn, the national economy. From 2019 to 2022, domestic cultural tourism has doubled with a growth of 109%, exceeding the total growth in domestic tourist trips, which was 63% during the same period, and showing a growth in the share of tourist trips involving cultural activities.⁽⁴¹⁾

According to statistics, in 2022, the number of domestic tourist trips that included cultural activities reached a record high of 18 million trips - a growth rate of at least 52% compared to the previous year (Figure 26). This continues the upward trend that began in 2020 after a slight decline due to the COVID-19 pandemic. This increase is not solely attributed to the overall growth in domestic tourism but also to the rise in the number of domestic tourist trips that

involved cultural activities. In 2022, one in four domestic tourist trips included cultural activities, a significant increase compared to 2019, representing only 18% of the total domestic trips.

However, the most significant change in cultural tourism in 2022 was the significant recovery in foreign cultural tourism figures. After reaching their lowest rate in five years in 2021, with only 480,000 trips, the figures almost reached the pre-pandemic levels with approximately 4 million foreign trips involving cultural activities, over eight times more than the previous year (Figure 27). This was possible after lifting the remaining exceptional preventive measures in the tourism sector locally and globally. However, this figure fell short of the number of tourist trips involving cultural activities in 2019, when they recorded their highest levels with over 5 million trips. The recovery of foreign cultural tourism was not only a reflection of the tourism sector's recovery, but it was also in line with the share of foreign tourist trips involving cultural activities out of the total trips, which was 24% compared to the previous year's low rate of 17%. Pre-pandemic, the share of foreign tourist trips involving cultural activities was higher than its counterpart in the domestic tourism sector. However, in 2022, no significant disparity was recorded between domestic and foreign tourism regarding their interest in cultural activities on tourist trips (Figure 28).

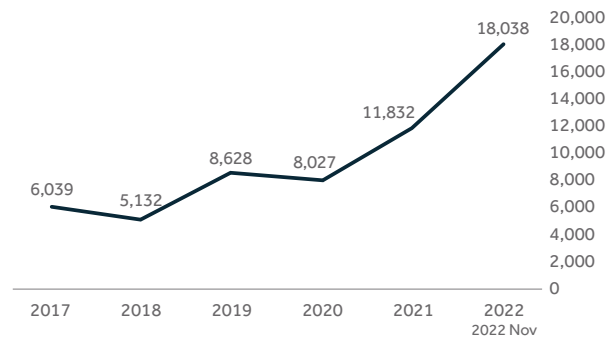


Figure 26: Domestic Tourist Trips Involving Cultural Activities (SAR Thousand)⁽⁴²⁾

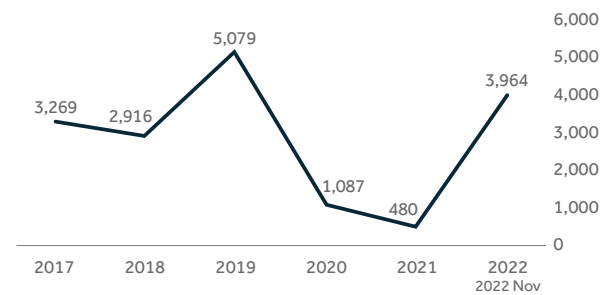


Figure 27: Foreign Tourist Trips Involving Cultural Activities (SAR Thousand)⁽⁴³⁾

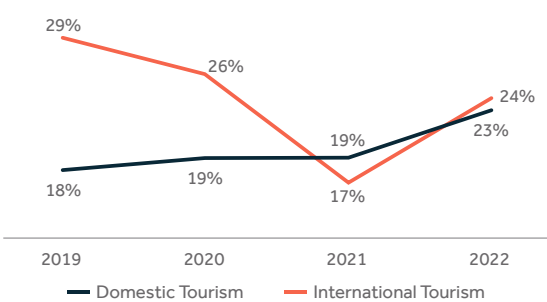


Figure 28: Market Share of Tourist Trips Involving Cultural Activities as a Proportion of Total Trips⁽⁴⁴⁾

Geographical Distribution of Cultural Tourist Trips

Tourist trips involving cultural activities are primarily concentrated in Makkah Province, accounting for over a third of the trips, exceeding 7.4 million foreign and domestic trips (Figure 29). This is mainly due to Makkah City's share of more than a third of the market of touristic trips as a pilgrimage and Hajj destination, as well as the presence of other tourist destinations such as Taif and Jeddah. Other cultural tourist destinations with trips involving cultural activities in 2022 of more than two million trips include Asir, Riyadh, Eastern,



and Madinah Provinces. Furthermore, Al-Baha and Asir Provinces have the highest share of cultural tourism within the total trips, with over one-third of domestic or foreign

trips involving cultural activities (Figure 30). Riyadh, Makkah, Tabuk, and the Northern Borders Provinces also have a high share of cultural tourism compared to the national average.

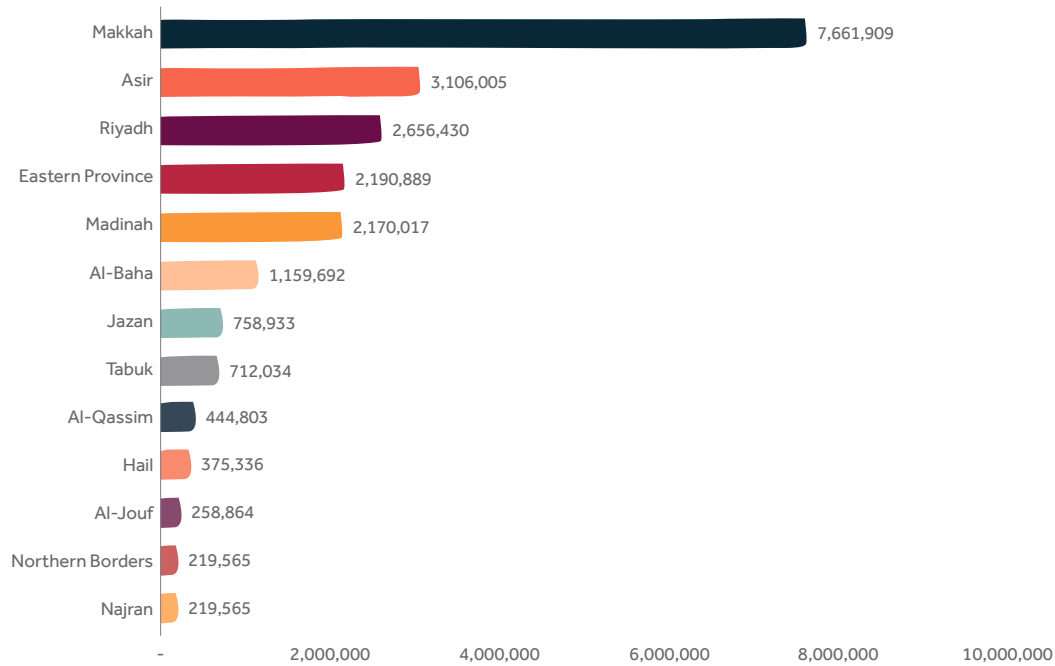


Figure 29: Distribution of Domestic and Foreign Tourist Trips Involving Cultural Activities by Province⁽⁴⁵⁾

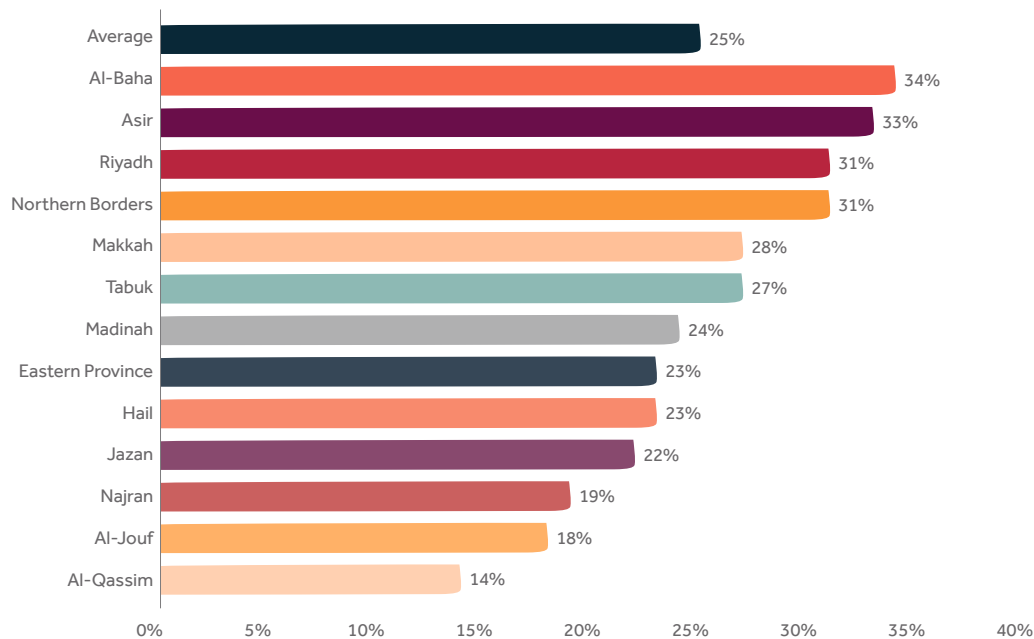


Figure 30: Market Share of Domestic and Foreign Tourist Trips Involving Cultural Activities as a Proportion of Total Trips by Province⁽⁴⁶⁾



Determinants of Demand on Cultural Services and Products

The Cultural Participation Survey provides us with indicators of consumer behavior patterns. By analyzing these indicators, we can better understand the factors influencing demand for cultural products and services and how they change over time. This allows us to gain insight into the differences in consumption patterns among different demographic groups. This chapter addresses the digital consumption of culture and the trends in preferences for cultural events based on data from the 2022 Cultural Participation Survey.

Digital Consumption of Culture

The COVID-19 pandemic in 2020 led to many cultural activities being put on hold due to preventive safety measures. As a result, people turned to digital media to participate in culture and consume cultural products. This led to a growth in digital services, such as e-books, streaming movies, and digital music platforms. The 2020 Report of the State of Culture addressed whether users would continue to prefer digital consumption of cultural products or if this was only due to the pandemic and would decline once it was over. The 2022 Report offers valuable insights into the digital consumption of culture. It highlights opportunities for growth in the digital market by measuring the preference level compared to other media regarding three digital services or products: e-books, audiobooks, and movie digital streaming platforms.

According to the 2022 survey, the number of people who read e-books and listen to audiobooks has remained steady since 2020. The highest percentage of respondents reported

reading an e-book in the last 12 months. Audiobook figures are also similar, with a slight increase that may not be statistically significant. However, it is worth noting that this change may relate to the growth in the overall percentage of people who read books from 49.8% to 54.8%. Figure 31 provides evidence that the surge in the utilization of e-books and audiobooks is not merely a result of their coincidental use during the pandemic. Instead, it suggests an increase in the potential customer base for these services. Therefore, it reinforces the significance of the Literature, Publishing, and Translation Commission's efforts to enable more publishers to take advantage of these growth prospects.⁽⁴⁷⁾

Looking at the preferences for watching films using digital streaming, the picture is slightly different from that of e-books. The percentage of those who prefer digital streaming services was higher in 2020. However, there may be growth in the preference for digital consumption of movies based on the fact that the number of participants who preferred digital streaming in 2022 was higher than the year before, albeit slightly (Figure 32).

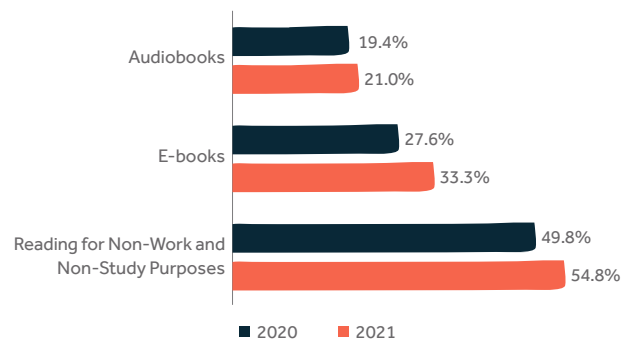


Figure 31: Relative Distribution of Book Reading Method in the Past 12 Months⁽⁴⁸⁾

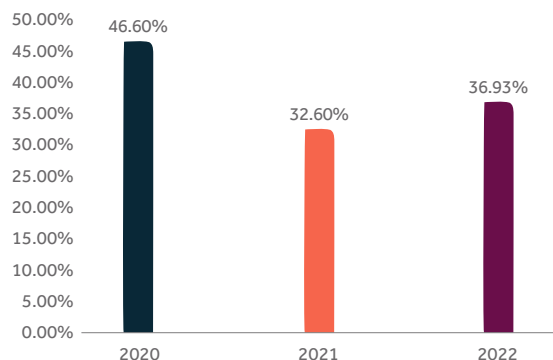


Figure 32: Percentage of Preference for Digital Streaming Platforms⁽⁴⁹⁾

Preference Trends for Cultural Events

Consistent with the 2021 Cultural Participation Survey, the 2022 survey showed similar results of relatively high literary and poetry events and lectures versus concerts and theatrical performances (Figure 33). However, this distribution of preference is greatly influenced by the age group. It does not provide an overall accurate reflection of preferences, as the overall rate is influenced by the weak preference of the older age group, those older than 35 years. Only 7% of survey respondents aged 55 and above shared their desire to hold more concerts, compared to 23% of the younger age group in the same sample. There is also a disparity between age groups in terms of theatrical performances, where the number of respondents who prefer theatrical performances increases among the 25-45 age group. Nonetheless, the opposite is the case with lectures

and seminars, where preferences increase with age groups, from 14% in the younger age group to 27% of those older than 54 years (Figure 34).

It is worth noting that the 2022 survey reveals a consistent preference for heritage activities across different age groups, with limited variation. Although it may seem reasonable to assume that younger age groups are less interested or engaged in heritage, Figure 34 shows that the second-highest number of people who want more heritage events are in the 18-24 age group. This suggests that younger generations are indeed interested in heritage, which is consistent with the 2019 Report on the State of Culture, highlighting youngsters' interest in heritage and cultural identity. This implies potential opportunities to design heritage-related products and services that cater to the needs of this age group.

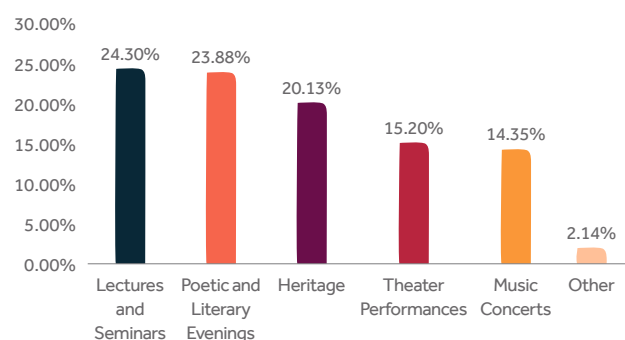


Figure 33: Relative Distribution of Cultural Events of Interest to the Survey Respondents⁽⁵⁰⁾

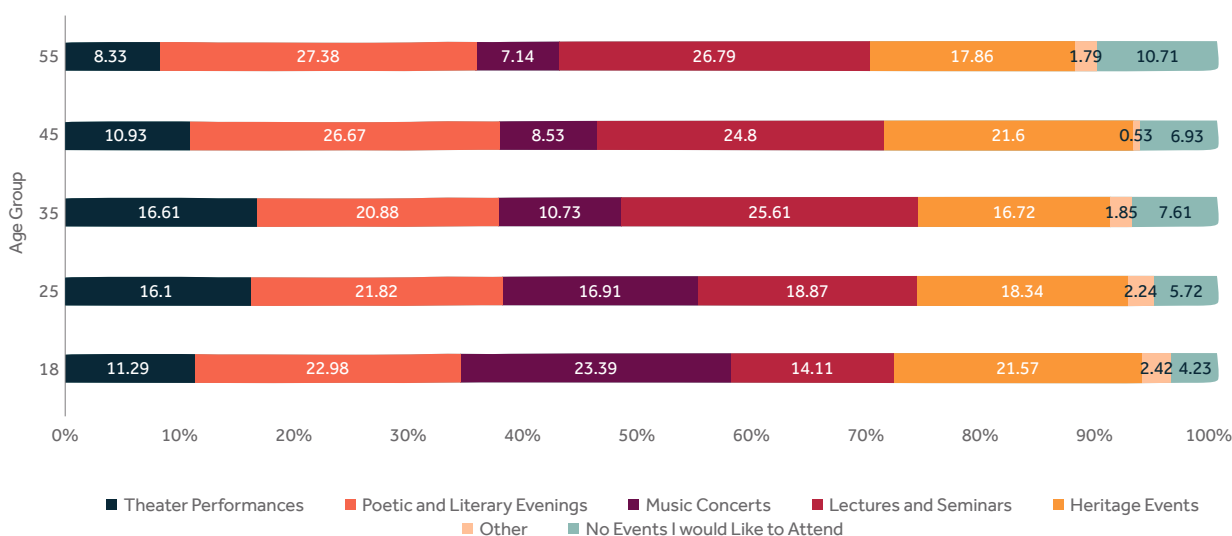


Figure 34: Relative Distribution of Cultural Events of Interest to the Survey Respondents by Age Group⁽⁵¹⁾

References

- (1) See the Methodology Appendix for more details on this concept.
- (2) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia, 2019: Facts and Figures, (Riyadh, Ministry of Culture, 2019).
- (3) Ministry of Culture, Op. Cit. and Report on the State of Culture in the Kingdom of Saudi Arabia 2020: Digitalization of Culture (Riyadh, Ministry of Culture, 2020).
- (4) The information presented in this chapter is derived from the General Administration for Cultural Capability Development and is based on Q3 of each year. The information was obtained on August 10, 2023. unavailability prior completing the report.
- (5) The Ministry of Culture divides cultural occupations into two categories based on their level of connection to the cultural sector: core and non-core. Direct cultural professions have an intrinsic cultural or creative nature, regardless of the context in which they are practiced. For instance, graphic design is considered a direct cultural profession, whether pursued within a specialized design establishment or as part of non-cultural advertising services. On the other hand, indirect cultural professions are those not inherently cultural unless practiced within a cultural activity. For example, construction is not considered a core occupation unless involved in restoring heritage buildings. Culinary occupations are classified as indirect professions, while the head chef position is classified as a direct profession due to its artistic involvement in designing the culinary experience. It is worth noting that this classification system helps clarify the distinctions between different types of cultural professions and ensures they are appropriately recognized and valued within the cultural sector.
- (6) See the Methodology Appendix for more information on the Saudi Standard Classification of Occupations.
- (7) Data from the Ministry of Culture (August 10, 2023).
- (8) Ibid.
- (9) Ibid.
- (10) Ibid.
- (11) Data from the Ministry of Culture (August 10, 2023).
- (12) Excluding chefs and baristas.
- (13) Data from the Ministry of Culture (August 10, 2023).
- (14) Data from the Ministry of Culture (August 10, 2023).
- (15) Data from the Ministry of Culture (August 10, 2023).
- (16) Excluding chefs and baristas.
- (17) Data from the Ministry of Culture (August 10, 2023).
- (18) Excluding chefs and baristas.
- (19) Data from the Ministry of Culture (August 10, 2023).
- (20) Data from the Ministry of Culture (August 10, 2023).
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- (22) Data from Small and Medium Enterprises General Authority (April 04, 2023).
- (23) "The Creative Economy: A 2020 Perspective" The World Economic Forum (2020).
- (24) Data from Small and Medium Enterprises General Authority (April 04, 2023).
- (25) Ibid.
- (26) Ibid.
- (27) Data from Small and Medium Enterprises General Authority (April 04, 2023).
- (28) "Cultural Development Fund: Annual Report for 2022."
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- (30) Data from Small and Medium Enterprises General Authority (April 04, 2023).
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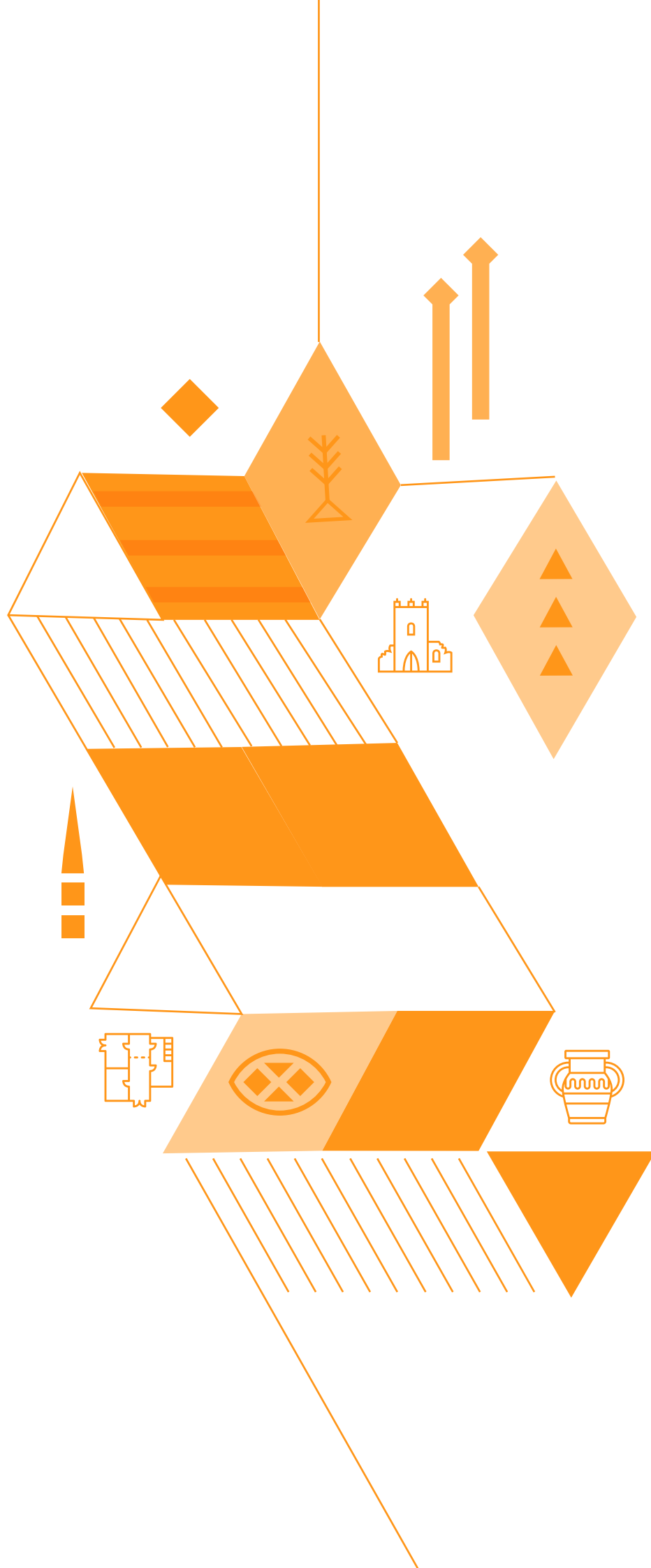
- (32) Data from Saudi Central Bank, retrieved on July 01, 2023, <https://www.sama.gov.sa/en-US/EconomicReports/Pages/report.aspx?cid=116>.
- (33) Data from Saudi Central Bank, retrieved on July 01, 2023, <https://www.sama.gov.sa/en-US/EconomicReports/Pages/report.aspx?cid=116>.
- (34) Data from Saudi Central Bank, retrieved on July 01, 2023, <https://www.sama.gov.sa/en-US/EconomicReports/Pages/report.aspx?cid=116>.
- (35) 36 See Management and Conservation Chapter.
- (36) Data from Film Commission (March 13, 2023).
- (37) The consumer price index is a statistical indicator for the changes in prices of a fixed market basket of commodities and services. Its data are based on the field survey of the consumer price index conducted monthly by the General Authority for Statistics, where prices are collected through field visits to retail POS and services. Several sections comprise the primary index, including leisure, culture, restaurants, hotels, clothing, and footwear.
- (38) International Monetary Fund (IMF).
- (39) IMF, retrieved on December 14, 2023, <https://www.imf.org/ar/Home>.
- (40) Data from the Ministry of Tourism (March 05, 2023).
- (41) Ibid.
- (42) Data from the Ministry of Tourism (March 05, 2023)
- (43) Ibid.
- (44) Ibid.
- (45) Ibid.
- (46) Ibid.
- (47) See Creativity and Cultural Production Chapter.
- (48) Cultural Participation Survey: Fourth Iteration 2022, see Methodology Appendix for details.
- (49) Ibid.
- (50) Ibid.
- (51) Ibid.

6

Chapter Six

Investment in the Cultural Sector

- Existing Investments in the Cultural Sector
- Legislation on Investment in the Cultural Sectors
- Support and Empowerment





One of the critical pillars of cultural strategies and public policies within the framework of the transformation taking place in Saudi Arabia is the multidimensional view of the contribution of culture to all aspects of development, including the economic side thereof. The cultural field now has productive sectors and creative industries that generate returns for investors, create job opportunities for workers, and provide commodities and services that improve the quality of life for a broad segment of beneficiaries. While commercial activities such as book markets and publishing have long existed, they were limited and not considered significant contributors to the national economy. However, this has changed with the current shift, which recognizes a broad range of cultural activities as economically productive and encourages professional practices within these activities, including theater, film, and design. The economic value generated through the cultural dimension is now also acknowledged, such as investing in quality experiences in culinary arts and supporting fashion design activities. However, it is essential to note that active programs and plans in Saudi Arabia for organizing cultural sectors are not limited to cultural sponsorship but focus on enabling investment, encouraging private sector contributions, creating incentives, and generating opportunities to attract investment.

One of the most significant challenges facing cultural institutions is to introduce the cultural sector as an economic sector that can generate high rates of growth in investment returns. This challenge is directly related to the Ministry of Culture's second objective, which is to promote culture for economic growth and enable the private sector to contribute approximately 3% of the Gross Domestic Product (GDP), including support for small and medium-sized enterprises, and placing culture at the top of the list of essential resources for creating local content.

Given the above, investing in culture is still a nascent sector, and comprehensive data regarding its status have yet to be available. Therefore, this chapter identifies the broad frameworks that create an enabling environment for investment. To this end, the chapter examines the major components of the cultural landscape and the forms of support available to shape it. It also discusses significant laws related to investment. Thus, the chapter relates to investment in the broadest sense, focusing on the investment-supportive environment and the components of the sector expected to

drive future investment. These include improving legislation, enhancing competitiveness, attracting cultural sectors, and providing grants and support opportunities to increase individual and private sector contributions. This will, in turn, have direct or indirect economic payoffs in the long run.

The Ministry of Culture is currently leading efforts to restructure and institutionalize certain aspects of the cultural sector.⁽¹⁾ The aim is to create an attractive environment for private-sector investment and promote production.⁽²⁾ Investment institutions in Saudi Arabia, such as the Public Investment Fund (PIF), play a crucial role in activating investment in the sector. In the past five years, foreign investment has also contributed significantly to the increase in the number of licenses issued to local and international investors in the cultural, art, and entertainment sectors.



Growth and Support in the Cultural Sector in 2022

Investing in the cultural sector requires certain preconditions to be met, such as an active and engaged cultural scene, a support system for creative professionals, and an infrastructure that facilitates cultural activities. One of the primary requirements for a viable cultural market is the existence of demand, which is indicated by participation from different segments of society

in cultural activities. Additionally, the availability of a creative workforce, including writers, designers, actors, and directors, and cultural facilities, such as theaters and production cities, play a crucial role. Therefore, a holistic understanding of the entire cultural sector and its development is essential to gain insights into the sector's suitability for attracting investment based on expected returns.

Proceeding from the above, the report shows positive signs of growth and development toward establishing a vibrant cultural sector. Cultural participation data suggest that people are increasingly engaging in cultural activities and institutions, such as music concerts, festivals, museums, art exhibitions, archeological sites, and nature reserves. The composite index of cultural participation has risen by 22% between 2021 and 2022. Likewise, the share of cultural tourism rose from the total of cultural trips. The trips that included cultural activities doubled within a year. Moreover, ticket sales for movie screenings have continued to grow, generating more than SAR 908 million in revenue in 2022, with an annual growth rate of 10%.

Improvements in various indices, such as the number of literary books and theater productions, have accompanied the increase in demand. This growth is a result of the support provided by cultural and governmental institutions. These institutions aim to stimulate production and push it towards financial sustainability. They do so by offering facilities to festivals, seasons, studios, and production and development labs. The film sector, for instance, is supported by the Film Commission, the Cultural Development Fund (CDF), NEOM, Ithra, and the Red Sea Film Festival Foundation. These entities provide financial reimbursement facilities and incentives, such as grants to support the film production sector in Saudi Arabia. Additionally, retreats and residencies are available for participants in other creative fields, such as literary authorship and visual arts. Moreover, several business accelerators kicked off this year for cooking, theater, and traditional arts, supporting a total of 57 participants.

Despite the growth in support for production, increased participation, and demand for cultural products and services, the cultural sector still needs further development in terms of infrastructure and geographical coverage. However, it is a sector full of potential for institutional investors due to the supportive environment, the availability of facilities, and the increase in cultural production. Some foreign investors have already recognized this potential, and significant investment companies within Saudi Arabia are also investing heavily in this sector, as will be explained in the following sections.



Existing Investments in the Cultural Sector

Foreign Investment Licenses

National statistics often group cultural and entertainment activities into one category, namely, "arts, entertainment, and recreation." This can be considered a general indicator, and Saudi Arabia has witnessed a significant growth in direct foreign investment in arts, entertainment, and recreation from 2017 to 2022. Figure (1) reflects a steady increase in the number of licenses issued for foreign investment in these fields, which more than tripled in 2022.

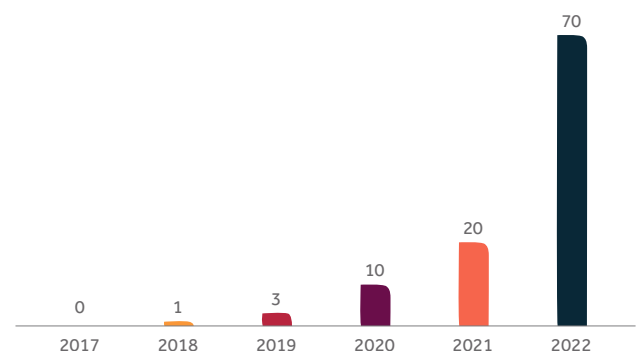


Figure 1: Number of Licenses for Arts, Entertainment, and Recreation⁽³⁾

Public Investment Fund (PIF)

The Public Investment Fund (PIF) is leading multiple projects through subsidiary companies to boost the cultural sector and create a thriving environment for private businesses. It has launched 18 investment projects through these companies in various provinces of Saudi Arabia, with many of them focusing on the architectural sector that takes inspiration from cultural heritage and the urban identity appropriate to

the geographical province. The PIF is also investing in the development and rehabilitation of historic and cultural sites, which will help promote domestic and international tourism. Some projects also aim to showcase elements of Saudi identity, such as the Saudi Coffee Company. Additionally, the PIF is venturing into the entertainment sector, organizing cultural events, and creating unique experiences to cater to the growing demand for this industry. These initiatives are expected to help achieve the country's tourism targets.



Figure 2: PIF Subsidiaries Related to Cultural Sector⁽⁴⁾ (to be in infographic form)

These companies have worked on projects that have enhanced the private sector's role in investing in the cultural sector. The main objective of Diriyah Gate Company is to transform Diriyah into a significant cultural and historical destination in the region. Soudah Development has collaborated with Darat King Abdulaziz to preserve the region's heritage by documenting 35 historical stories about its trails, paths, and legends. The Saudi Coffee Company is planning to invest SAR 1.2 billion in sustainable coffee cultivation in Jazan over the next ten years. The company will collaborate with the private sector to cover the entire value chain from cultivation to distribution and marketing. The project will consider all aspects of sustainability, contributing to job creation and promoting Saudi Arabia's role in exporting Saudi coffee to international markets.

Sela is a company that exclusively employs Saudi staff members to produce movies through their Boulevard Studio. They have launched the Boulevard World project in Riyadh,

which aims to showcase the cultures of ten different global civilizations in Riyadh City and provide an entertaining experience for visitors.⁽⁵⁾

Legislation and Laws on Investment in Cultural Sectors

The cultural sector has witnessed the implementation of new resolutions through the issuance of the Implementing Regulations. One of the most significant changes was the delegation of new powers to cultural commissions, particularly in areas such as cultural heritage, museums, and urban heritage. The mandates of these sectors have shifted from the tourism sector to the cultural sector.⁽⁶⁾ The tourism industry was also a sector of interest (Table 2). By the end of the year, the National Intellectual Property Strategy (NIPST) was launched with the goal of strengthening and protecting one of the fundamental pillars of creative work.

Intellectual Property Rights and National Strategies

The protection and regulation of intellectual property rights are crucial from a regulatory point of view to drive creative work, protect the rights of creative professionals, and create a safe and encouraging environment for investment in the business sector. In Saudi Arabia, the regulation of intellectual property dates back to 1939 when the first national law for intellectual property, known as 'Trademarks,' was adopted.



The most significant development in this regard was the launch of the NIPST on December 22, 2022, which aims to build an intellectual property ecosystem that supports an economy based on innovation and creativity by creating an intellectual property value chain that stimulates the competitiveness of innovation and creativity and supports economic growth so that Saudi Arabia becomes a leader in intellectual property. Preparing the strategy included

reference to national documents, the most important of which is Saudi Vision 2030, analyzing the intellectual property environment in Saudi Arabia by reviewing more than 120 references, and conducting a benchmark comparison with the G20 countries and the five principal intellectual property offices in the world to formulate a five-year strategy. It relies on four pillars and 12 initiatives, which in turn contain 54 projects.

Table 1: Intellectual Property Regulations and Laws Enacted during the Year

Resolution/Regulation	Date	Details and Comments
Implementing Regulations of the Copyright Protection Law	June	<ul style="list-style-type: none"> Decision No. 03/21/2022 of the Saudi Authority for Intellectual Property (SAIP) dated 17/11/1443 AH amending the Implementing Regulations of the Copyright Protection Law originally issued by decision No. M/W/1/1688 of the Minister of Media dated 10/04/1425 AH and amended by decision No. M/W/1640 of the Minister of Culture and Media dated 15/05/1426 AH.
National Intellectual Property Strategy	December	<ul style="list-style-type: none"> HRH Prince Mohammed bin Salman bin Abdulaziz Al Saud, Crown Prince, Prime Minister and Chairman of the Council of Economic and Development Affairs, launched the NIPST on December 22, 2022 (28/05/1444 AH). NIPST aims to build an intellectual property ecosystem that supports an economy based on innovation and creativity by developing an intellectual property value chain that stimulates innovation and creativity competitiveness and supports economic growth to ensure that Saudi Arabia becomes a leader in intellectual property. Article 3 of the Law of the SAIP issued by the Council of Ministers decision No. 496 dated 14/09/1439 AH, states, "Preparation of the National Intellectual Property Strategy, following up on its implementation, developing action plans and schedules in coordination and cooperation with the relevant bodies."





Tourism Development: Regulations and Laws

Throughout the year, there has been an increasing focus on the tourism sector and its development, leading to the implementation of several necessary regulations. One of these regulations is the Tourism Law, which aims to enhance the quality of colleges and tourist facilities in line with United

Nations World Tourism Organization (UNWTO) classifications and international standards. Additionally, several regulations have been enacted (Table 2). The tourism sector is closely linked to various cultural fields, such as heritage in its various forms, events, culinary arts, and other sectors, either directly or indirectly. The growth of domestic cultural tourism reached 109%,⁽⁷⁾ indicating a significant increase that reflects the close relationship between tourism and the cultural sector in general.

Table 2: Regulations and Laws Enacted for the Tourism Sector

Sr.	Resolution/Regulation	Issued (2022)
1	Regulations of Tourism Development Councils in Provinces	April
2	Requirements and Conditions for Obtaining a License for Tourist Accommodation Facilities in Makkah and Madinah	April
3	Tourism Law	August
4	Regulations for Tourism Visas	September
5	Regulations for Tourist Hospitality Facilities	December
6	Regulations for Tourist Destinations	December
7	Regulations for Travel and Tourism Services	December
8	Regulations for Tourism Consultancies	December
9	Regulations for Inspection of Tourism Activities	December

Support and Empowerment

Cultural Development Fund

The CDF mainly aims to grow and sustain the cultural sector by supporting cultural activities and projects. The CDF plays a vital role in promoting cultural investment within local communities, strengthening entrepreneurship, increasing sector profitability, and enabling broader participation in cultural activities. To achieve these objectives, the CDF supports all sixteen culture sectors through various funding mechanisms that strengthen the sector in different areas, such as content creation and development, education and training, infrastructure support, dissemination and marketing of cultural products, operation of cultural institutions, and enabling digital transformation. In addition, CDF intends to activate investment programs aimed at increasing the culture sector's contribution to the Saudi economy. The CDF also provides non-financial consulting services to institutions and individuals working in different cultural fields. Additionally,



the CDF seeks to strengthen the role of SMEs in the cultural sector and forge effective strategic partnerships with various government, private, and nonprofit entities. These efforts aim to promote sustainable development and increase the positive impact of the cultural sector and its practitioners.

Table 3: CDF Partnerships and Agreements in 2022⁽⁸⁾

Partnership Entity	Signing Date	Agreement Type	Agreement Overview and Role in the Cultural Sector
King Abdulaziz Center for World Culture (Ithra)	December	Partnership and Sponsorship	The agreement aims to elevate the cultural sector by providing support to professionals in the field. This support is facilitated through the Content Enrichment Initiative managed by Ithra.
Future Investment Initiative	March	Strategic Partnership	The agreement aims to enhance the cultural presence in the investment sector, increase awareness about the Fund's work and achievements, and attract investors.
Red Sea International Film Festival	December	Official Sponsorship	The agreement aims to reach filmmakers and those working in the sector, in general, to attract investments and create awareness about the Fund's work.
Cultural Road Program, Riyadh Bank	April	Funding	The agreement aims to provide financial solutions for professionals in the cultural sector, including bank guarantees. This facilitates the process by offering financial products and raising private sector contributions to cultural financing.
Tourism Development Fund	March	Memorandum of understanding	The MoU aims to establish mechanisms for cooperation between the cultural and tourism sectors. The goal is to activate joint financing mechanisms and innovate cultural and tourism products.
Small and Medium Enterprises General Authority (Monsha'at)	August	Memorandum of understanding	The MoU aims to develop products that contribute to supporting SMEs operating in the cultural sector.

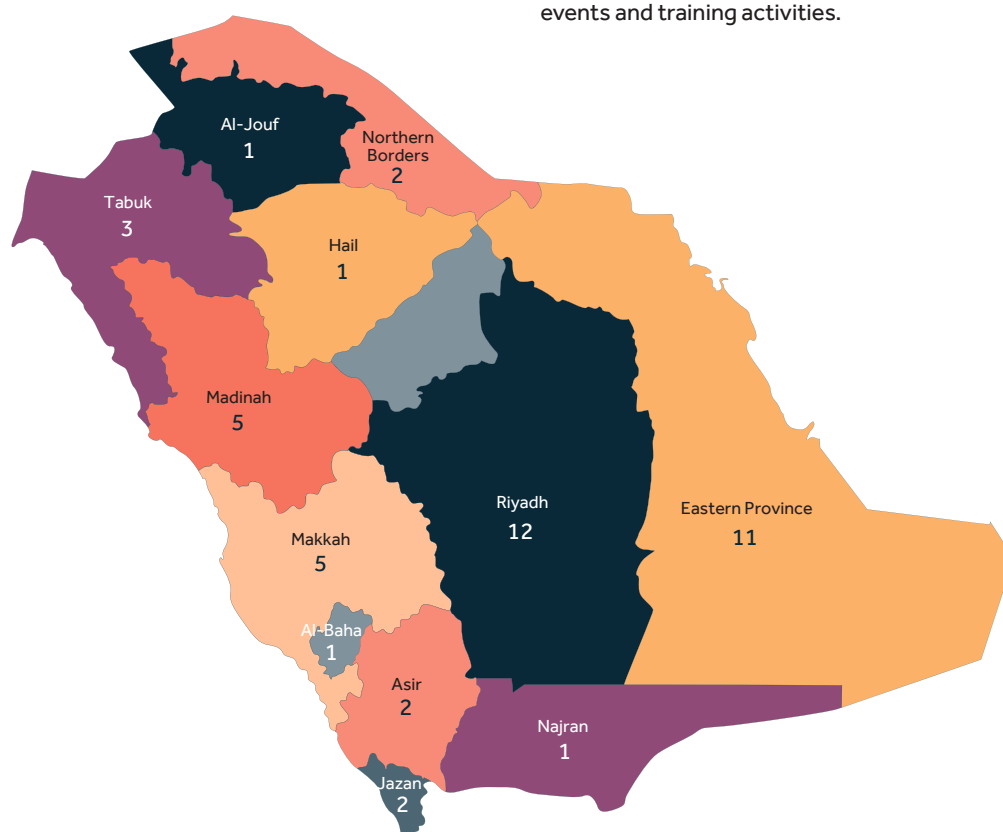
In 2022, the CDF launched three programs to stimulate the cultural sector with a total budget amounting to SAR 277.5, which are financial grants or financing programs for companies operating in the cultural sector.

Table 4: CDF Programs and Allocated Budget

Program	Product	Overview	Budget
Promotion of Cultural Projects	Grant	CDF's first program in collaboration with the Quality-of-Life Program. The latter has fully funded the program, allocating a total of SAR 177.5 million to it. The program aims to provide financial support and incentives to qualified cultural sector projects to carry out and expand their activities and improve the quality of their services and outcomes.	SAR 177.5 million
Guarantee Program, Riyadh Bank	Guarantees	One of CDF's financing programs for private sector establishments implementing projects for the Ministry of Culture and its commissions or those with unique cultural activities. Riyadh Bank provides credit facilities, while the CDF offers a financial guarantee letter to the bank covering 90% of the granted facilities.	SAR 50 million
Guarantee Program, Kafalah SME Loan Guarantee Program	Guarantees	The Kafalah Cultural Sector Facilities Financing Guarantee Program is one of the CDF-supported programs that aims to facilitate financing for targeted facilities.	SAR 50 million

Apart from the initiatives undertaken by the CDF, cultural commissions also play a role in supporting these efforts by providing accelerators. Two noteworthy examples are the

publishing accelerator by the Literature, Publishing, and Translation Commission and the Literary Partner Program, which allows cafés to utilize their spaces as venues for literary events and training activities.

Figure 3: Number of Cafés Participating in Literary Partner Initiative by Province⁽⁹⁾ (to be in infographic form)

Investment in the Cultural Sector

The Publishing Accelerator Initiative for children's and young people's literature achieved remarkable results in terms of an increase in sales, which amounted to SAR 488,960, an increase of 1015% compared to the situation before the accelerator.

Table 5: Revenues of Projects Participating in the Business Accelerator

Graduated Project	Revenues Prior to Accelerator (SAR)	Revenues Post the Accelerator (SAR)
Nawar	1,400	9,000
Beginning of a Story	0	6,000
Book school	0	7,500
Fahman	0	187,500
Child's Mail	0	29,410
Mom reads	14,600	20,800
Hakeena	16,000	190,000
Watan's books	13,250	38,750
Stories	Free services	Free services
Rayya Platform	Free services	Free services
Total Revenues	43,850 (SAR)	488,960 (SAR)





Promising Opportunities

Investors are finding promising opportunities in active cultural sectors, especially with regulatory and legislative developments, as well as support and incentive programs offered by state agencies like the MoC, cultural commissions, the CDF, and other institutions. The cultural sector is becoming increasingly privatized, and the private sector

is being encouraged to invest in it. This trend is reflected in the growing interest in and participation in cultural events, especially in newer sectors like film and theater.⁽¹⁰⁾ As the report contributes to drawing attention to several promising investment opportunities, some answers were collected from those working in cultural commissions themselves to shed light on some of the most prominent of these opportunities.

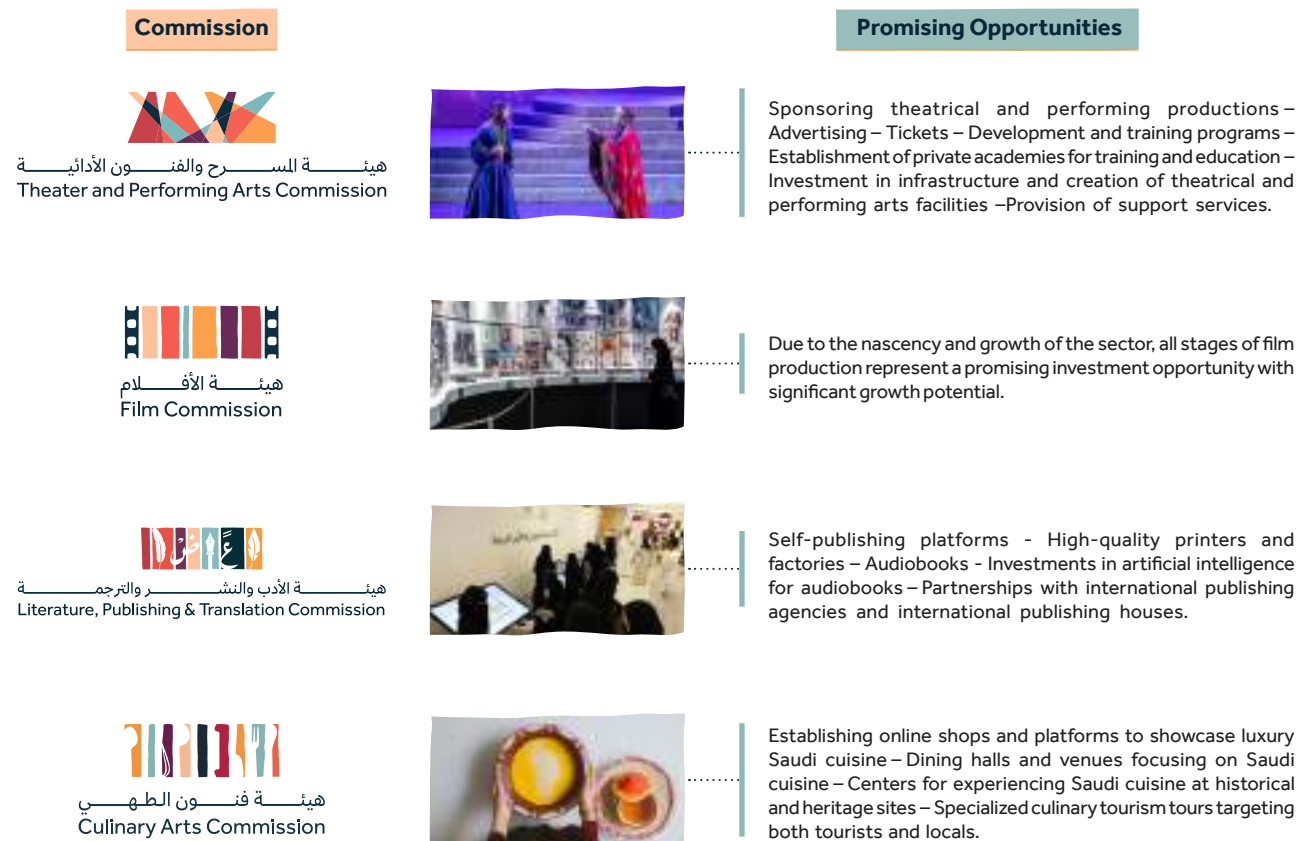


Figure 4: Promising Investment Opportunities in the Cultural Sector (to be in infographic form)

References

- (1) See the Management and Conservation chapter for more information.
- (2) See the Management and Conservation chapter for more about production support programs.
- (3) Direct foreign investment data, invest in Saudi Arabia: <https://www.investsaudi.sa/en/economicHighlights/investmentData>.
- (4) Data from the Public Investment Fund: March 15, 2023.
- (5) Data from the Public Investment Fund: March 15, 2023.
- (6) See Management and Conservation: Empowerment and Regulatory Frameworks for more details.
- (7) See Creative Economy chapter, Cultural Tourism.
- (8) Data from the Cultural Fund: March 21, 2023
- (9) Data from the Literature, Publishing, and Translation Commission: April 11, 2023.
- (10) See Cultural Participation Chapter for more details.





Conclusion

Throughout its different chapters, the 2022 Report on the State of Culture delineates a comprehensive overview of the Saudi cultural landscape, which cannot be reduced to the mere numbers and statistics presented in the chapters. Although the report includes valuable quantitative data, it only provides a partial glimpse into the vital and ever-evolving cultural environment. The report's chapters delved into institutional, organizational, and individual levels of cultural development, analyzing trends and features across various social groups.

This report highlights the continuous transformations that have taken place in the cultural sector, particularly with respect to regulatory and organizational developments that may be categorized into four main areas. Firstly, issuance of decisions, laws, and regulations, such as designating the Founding Day a national holiday, launching the National Intellectual Property Strategy (NIPST), approving the Implementing Regulations on Antiquities, Museums, and Urban Heritage; copyright; and Tourism Law and Implementing Regulations. Secondly, there has been a transfer and organization of jurisdictions and mandates in various cultural sectors, such as cinema, translation, heritage, and antiquities. Thirdly, there has been a renewed focus on issuing licenses to cultural practitioners. The third edition of the MoC's Abde'a Licensing Platform, for instance, now includes licenses for cultural training facilities and higher education training institutes to raise the sector's regulatory and professional level. Lastly, there has been a concerted effort to develop standard classifications and definitional frameworks for the cultural sector, subsectors, and other relevant areas. This includes regulatory frameworks for cultural and educational programs and specializations, as well as the classification system for cultural professions. These efforts are geared toward promoting the sector's efficiency, uniformity, and effectiveness.

The cultural and creative sectors have witnessed a significant increase in the number of beneficiaries and opportunities for support and enablement. This increase has aided organizational and regulatory efforts and has been facilitated through the provision of grants, support funds, incubators, and business accelerators for facilities development. Additionally, arts and literary residencies have been established to train and support artists and writers,

and awards have been introduced to encourage creatives and practitioners in the cultural field. Empowerment and organizational efforts have resulted in a noticeable growth in the levels of cultural production, including an increase in the number of art galleries and theater and performance shows. While data measuring the disparity or equality between different societal groups across some indicators, such as production, is limited, the report has revealed a promising level of female participation in the labor market represented by their increased number in cultural specializations and female graduates from cultural programs.

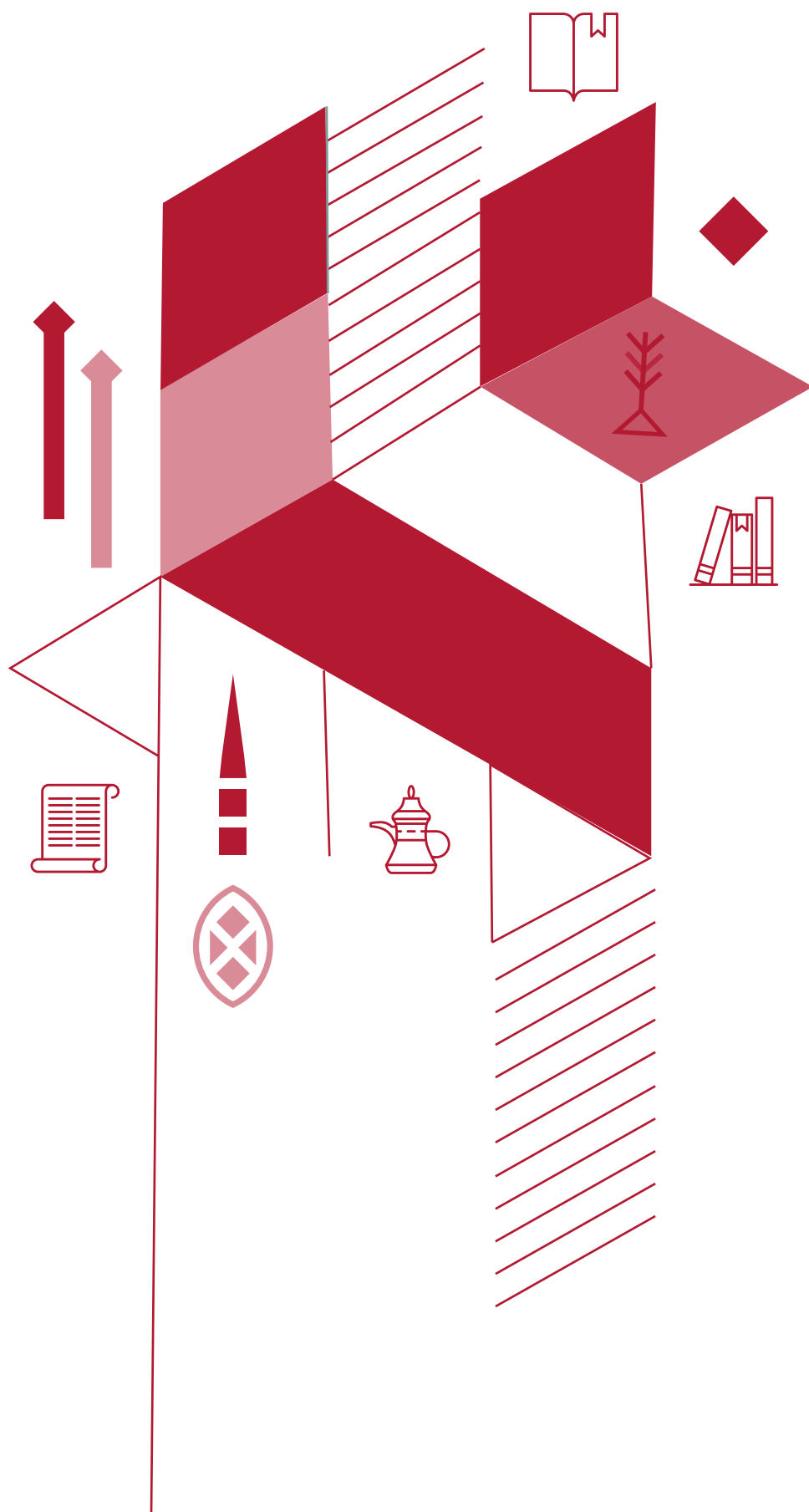
The fourth edition of the Cultural Participation Survey has revealed a significant increase in cultural participation levels, with multiple indicators registering their highest rates. This growth is not only due to the cultural sector's post-pandemic recovery but also reflects a broader range of participants and practitioners. This points to a promising and increasingly appealing local cultural content scene, including festivals, theater, movies, and other artistic output.

The indicators for domestic cultural tourism have witnessed substantial growth both in terms of increased trip rates and the market share of domestic cultural tourism, which can be attributed to Saudi Arabia's increasing interest in promoting tourism and the regulatory and organizational developments introduced to the sector. The Management and Conservation and Investing in Culture chapters have presented a portion of the laws and regulations issued in 2022 to support and regulate the tourism sector.

Finally, the fourth edition of this report offers a detailed insight into the Saudi cultural sector. While not claiming to be a complete overview, the report presents reliable statistics, analyses, comparisons, and discussions of trends and results. It provides an approach to reading and comprehending the cultural scene with all its potential and challenges. Its primary focus is to provide organized and periodic data that can contribute to building cultural policies, documenting national achievements, and mobilizing all efforts in governmental, public, and private sectors and the general public to support the ongoing march of cultural development and push it to open and ever-expanding horizons.

Appendices

- **Appendix (1): Methodology Framework and Sources**
- **Appendix (2): Cultural Participation Survey 2022**
- **Appendix (3): Glossary**





Appendix (1): Methodology and Sources

Overview

In preparing the fourth edition of the Report on the State of Culture in the Kingdom of Saudi Arabia, our main objective was to build on the frameworks established in the third edition to shape the 2022 Report. Such a continuity was essential to ensure consistency in concepts, data collection, presentation, and comparison. The report continues to monitor the state of cultural sectors and measure their respective indicators across five chapters that reflect



dimensions in various cultural sectors. Additionally, a sixth chapter is dedicated to exploring investing in culture, which is the theme of this edition.

First: Methodology of the Fourth Edition 2022

The preceding versions of the report have developed models that form the basis for the fourth edition. Specifically, the report's methodological framework was built using two statistical models developed by UNESCO: the 2009 "Culture Cycle" and the 2019 "Thematic Indicators of Culture" (UNESCO Culture|2030 Indicators). The previous reports adapted these models to fit the local data and the report's scope and objectives. While the methodology of the 2020 report employed both models separately (the culture cycle to build the components of the chapters and the thematic indicators for the indicator framework), the fourth report adopted the methodological framework used in the 2021 report, which merged both models. The thematic indicators of culture were the starting point, while elements and definitions from the culture cycle model were added, including the addition of a whole dimension: production and creativity. Accordingly, the report's framework was established to address the state of culture qualitatively and measure it statistically through five dimensions (see the figure below).

The report expands on the model and delves into the state of cultural sectors in Saudi Arabia by examining five dimensions: Creativity and Production, Cultural Participation, Knowledge and Skills, Management and Conservation, and Creative Economy. Each dimension is discussed in a separate chapter, while the sixth chapter focuses on a specific theme, which is analyzed in detail, like the previous report.

In other words, the report has maintained the same methodological framework used in the 2021 edition. However, it has incorporated some necessary developments to make better use of cultural indicators and present data more effectively. Two significant adjustments have been introduced in the current report to achieve these goals, which are:

Restructuring Some Indicators:

In the planning phase for the chapters, the report aimed to



restructure several cultural indicators to tailor them to this edition and optimize the ways in which they are used. The modifications include:

- In the Creativity and Cultural Production Chapter, a new sub-indicator has been introduced within the publishing indicators. This sub-indicator measures, monitors, and tracks the features and trajectories of scientific research and knowledge production across all cultural sectors. In the previous report, the effectiveness of scientific research and knowledge production was only evaluated in the fields of Arabic language and heritage. However, this indicator has now been moved from the Management and Conservation Chapter to the Creativity and Cultural Production Chapter to incorporate scientific research activity as a part of cultural production. The purpose of this change is to ensure consistency and coherence of methodology across all indicators in the report.
- The visit and attendance indicators are combined with the distribution and diversity indicators to create the attendance and diversity indicator in the Cultural Participation Chapter, with a particular emphasis on the results of the Cultural Participation Survey in its fourth iteration in analyzing trends and variables.

Allocating a Separate Chapter to the Report Theme

Chapter six of this edition is dedicated to discussing the annual theme of the report. Unlike the 2021 edition, this

discussion focuses solely on the data and indicators related to investment in the cultural sector without reviewing general features and conclusions. This approach aims to provide more attention to the theme of the report.

Second: Five Dimensions and Report Chapters

The report was organized into six chapters, along with an appendix for methodology and sources and another for the participation survey. It aimed to cover all cultural fields in a balanced manner without any significant disparities. The first five chapters focus on cultural dimensions as follows:

1. Management and Conservation

In its monitoring of the cultural preservation and conservation ecosystem - whether in the practices of inventorying and documenting heritage and the sustainable development of its resources or the availability of infrastructure and facilities - the chapter builds on the model of the environment dimension and resilience to climate change in UNESCO Culture[2030 Indicators. The second section, which includes the regulatory/organizational aspect of culture, including entities, institutions, and support programs, is a sub-indicator within the prosperity and livelihood dimension. The chapter also addresses indicators of serving the Arabic language through monitoring language policies and projects.

2. Creativity and Cultural Production

This dimension focuses on two stages of the cultural cycle: creativity and production. The definitions used in earlier versions of the report are employed in this chapter, where production encompasses all aspects of cultural production processes, including the quantification of production levels and diversity. Creativity refers to the unique styles of works and their artistic and subjective aspects. Since the report does not include an artistic evaluation of the contents, the identification of financial and international cultural awards is used as indicators of the creative state.

3. Cultural Participation

The definition of the culture cycle has been expanded to include various dimensions of social participation beyond the traditional cycle of production and consumption. It reflects the ability of the cultural field to involve society in its diverse cultural aspects and assesses the

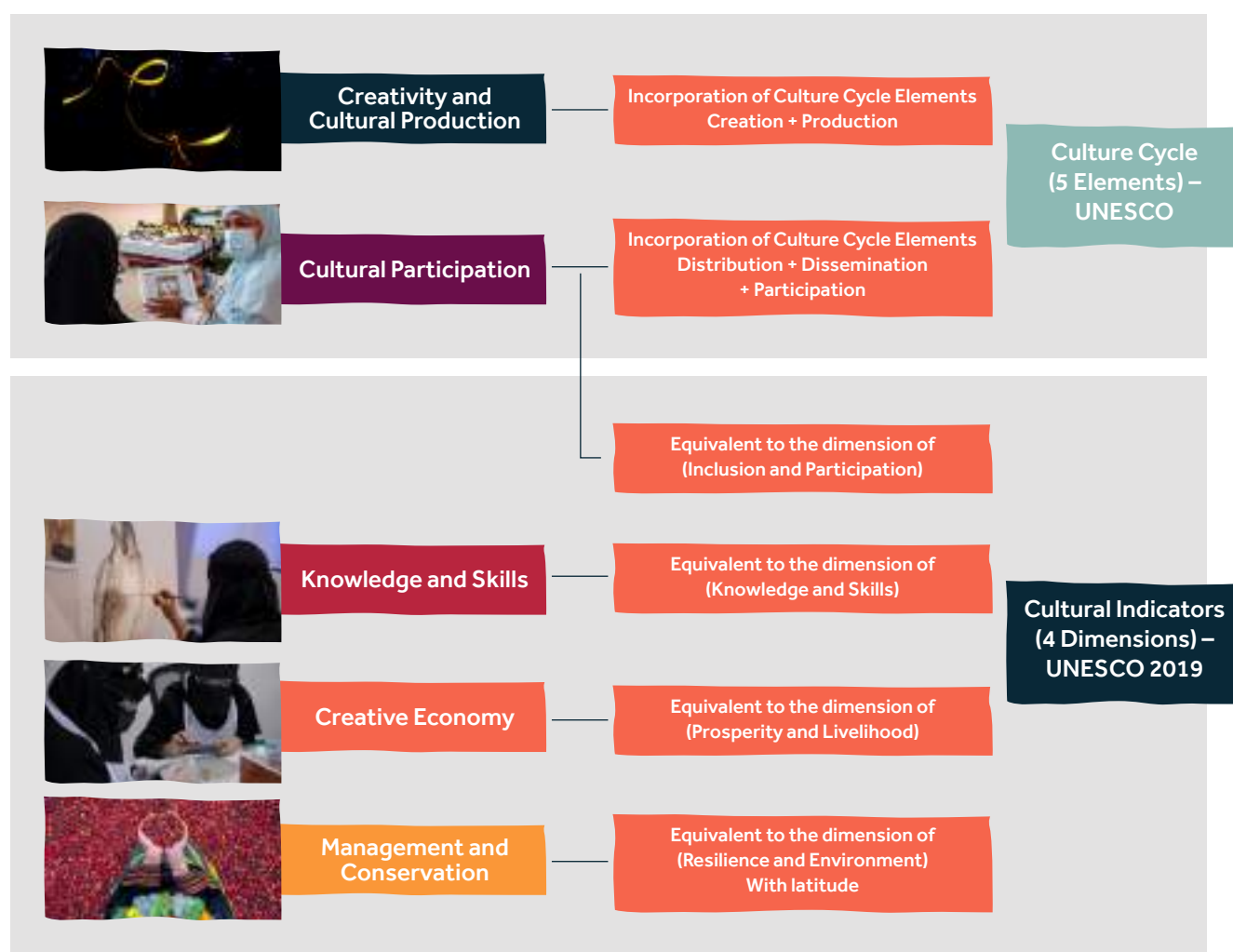
effectiveness of cultural presence and accessibility in cities and destinations. The measurement tools consist of an indicator of participation levels based on visitation numbers, a cultural participation survey, and indicators of social integration and cultural tourism.

4. Knowledge and Skills

The chapter explores the cultural education and training features and trends in Saudi Arabia for the year. It assesses the effectiveness of the educational ecosystem in imparting cultural knowledge and skills and building capabilities at all stages of education and training, including basic education and specialized cultural qualification. The chapter refers to the definitions of UNESCO's Thematic Indicators of Culture, one of which is its title.

5. Creative Economy

This chapter focuses on the economic aspect of culture, commonly referred to as cultural industries. It examines



various indicators of the cultural economy in Saudi Arabia, including growth trends, market potential, and expenditures, such as the average household spending on cultural services and products. Additionally, the chapter delves into the state of the labor market, growth trends in various cultural fields, and indicators of cultural tourism. Presenting statistical and economic indicators of culture in a comprehensive section provides a valuable opportunity to showcase the overall market indicators of cultural services and products, as well as areas of demand. This would be beneficial for all market players, including investors, regulatory agencies, and entrepreneurs.

6. Theme of the 2022 Report: Investing in Culture

Chapter six of the report, just like in the previous edition, is dedicated to the annual theme of the report, which is investing in culture. This chapter provides a panoramic view of the most promising investment opportunities and potential in Saudi Arabia, with a particular focus on the cultural sector. The theme is integrated with the economic aspect of the report and is discussed in detail in the Creative Economy Chapter, where all economic indicators are thoroughly examined. Chapter six, however, focuses on general indicators of investment stimulation, as well as highlighting potential regulatory arrangements pertaining to investment, funding and support programs, and investment institutions in various cultural sectors.

Third: Definitions of Indicators

The methodology for this year's report includes a glossary appendix that defines the indicators and their measurement mechanism, which helps standardize the results. The 2022

edition of the report has provided definitions for cultural indicators, core concepts, and terminology based on the following sources: firstly, if central data are utilized to measure the indicator, the definition provided by the entity that supplied the data should be used, if available. Secondly, definitions outlined in the relevant national regulations and laws are employed. Thirdly, definitions from international frameworks and standards, compatible with the report's indicators and measurement methods, are utilized. Fourthly, citing linguistic dictionaries and reputable scientific studies that suit the context of the report. Fifthly, if any of these sources lack proper definitions, the report has developed its definition for the concerned indicator or terminology. See the Glossary Appendix for more details.

Fourth: Data Sources

1. Preliminary Data from the Relevant Entities

The report collected data from 171 entities for analysis. These entities included the MoC, cultural commissions, actors in the cultural ecosystem, as well as several ministries, universities, and governmental, public, and private sector bodies (Table 1). Before using the data, the report reviewed and ensured they were free from conflicts with other sources. This was achieved by subjecting the data to numerous rounds of updates and supplemental requests to the relevant entities. In some cases, the report merged some of the data used and collected from various sources (see Sixth below). Although the data and statistics included in the report are not a comprehensive inventory due to their decentralized nature, they still provide the best available measurement indicator, as explained in relevant sections.

Table 1: List of Data Contributors in the 2022 Report

Sr.	Entity
1	Federation of Saudi Chambers
2	Saudi Post – SPL
3	Saudi Central Bank
4	Alsahia Civil Society in Unaizah
5	Saudi Heritage Preservation Society (We Are Our Heritage)
6	Saudi Arabian Society for Culture and Arts
7	Cultural Development Fund
8	National Center for Wildlife
9	National Center for Vegetation Development and Combating Desertification

Sr.	Entity
10	National Center for Meteorology
11	National Events Center
12	Royal Institute of Traditional Arts
13	Technical and Vocational Training Corporation
14	Saudi Data and AI Authority
15	Saudi Tourism Authority
16	Saudi Authority for Intellectual Property
17	General Authority for Statistics
18	General Entertainment Authority
19	Small and Medium Enterprises General Authority (Monsha'at)
20	Saudi Ports Authority
21	Royal Commission for Jubail and Yanbu
22	Royal Commission for AlUla
23	Royal Commission for Riyadh City
24	Royal Commission for Makkah City and Holy Sites
25	Emirate of Al-Baha Province
26	Emirate of Al-Jouf Province
27	Emirate of Riyadh Province
28	Emirate of Eastern Province
29	Emirate of Madinah Province
30	Emirate of Tabuk Province
31	Emirate of Najran Province
32	MBC Academy
33	Quality of Life Program
34	Social Development Bank
35	Telfaz11
36	Khaled Al-Youssef, Literary Writing and Publishing Movement in Saudi Arabia 2021-2022: A Bibliographic-Bibliometric Study
37	King Abdulaziz Foundation for Research and Archives (Darah)
38	Rawaq

Sr.	Entity
39	Rotana
40	Thmanyah Company for Publishing and Distribution
41	Saudi Entertainment Ventures Co. (SEVEN)
42	Myrkott Company
43	Jeddah Central Development Company
44	Public Investment Fund
45	Tourism Development Fund
46	Saudi Industrial Development Fund
47	Saudi Human Resources Development Fund
48	King Salman Global Academy for the Arabic Language
49	King Abdulaziz Library
50	Boutique Group
51	Communication and Financial Knowledge Center
52	Abdulrahman Al-Sudairy Cultural Center
53	Madinah Arts Center
54	King Abdulaziz Center for World Culture (Ithra)
55	King Faisal Center for Research and Islamic Studies
56	Non-Oil Revenues Development Center
57	Institute of Public Administration
58	Thaqqif Institute
59	Misk Art Institute
60	Library of Al Masjid Al Haram
61	King Abdulaziz Public Library
62	King Fahad National Library
63	Sulaiman Al-Rajhi Public Library
64	Saudi Film Festival
65	King Khalid Foundation
66	Alwaleed Philanthropies
67	Adab Foundation
68	Diriyah Biennale Foundation

Sr.	Entity
69	Art Jameel
70	Prince Mohammed bin Salman bin Abdulaziz Foundation (Misk)
71	Red Sea International Film Festival
72	Neom
73	Libraries Commission
74	Saudi Broadcasting Authority
75	Literature, Publishing, and Translation Commission
76	Fashion Commission
77	Film Commission
78	Research, Development, and Innovation Authority (RDIA)
79	Heritage Commission
80	Visual Arts Commission
81	Museum Commission
82	Theater and Performing Arts Commission
83	Music Commission
84	Diriyah Gate Development Authority
85	Imam Turki bin Abdullah Royal Natural Reserve
86	Imam Abdulaziz bin Mohammed Royal Reserve Development Authority
87	King Salaman Royal Natural Reserve
88	King Abdulaziz Royal Reserve Development Authority
89	Eastern Province Development Authority
90	Hail Province Development Authority
91	Asir Province Development Authority
92	Makkah Province Development Authority
93	Jazan Mountain Regions Development and Reconstruction Authority
94	Education and Training Evaluation Commission
95	Saudi Export Development Authority
96	Authority for Persons with Disabilities
97	Culinary Arts Commission
98	Architecture and Design Commission

Sr.	Entity
99	Ministry of Communications and Information Technology
100	Ministry of Investment
101	Ministry of Economy and Planning
102	Ministry of Media
103	Ministry of Environment, Water, and Agriculture
104	Ministry of Commerce
105	Ministry of Education
106	Ministry of Culture
107	Ministry of Culture – Planning and Performance General Department
108	Ministry of Culture – Non-profit Sector Organizations General Department
109	Ministry of Culture – Cultural Scholarship Department
110	Ministry of Culture – Abde`a Platform
111	Ministry of Culture – Cultural Assets and Centers Deputyship
112	Ministry of Culture – Communications and Media Deputyship
113	Ministry of Culture – National Partnerships and Development Deputyship
114	Ministry of Culture – Legal Affairs and Regulations Deputyship
115	Ministry of Culture – International Cultural Relations Deputyship
116	Ministry of Culture – Festivals and Events Deputyship
117	Ministry of Culture – Cultural Capabilities General Department
118	Ministry of Culture – Research and Cultural Studies General Department
119	Ministry of Sport
120	Ministry of Tourism
121	Saudi Ministry of Islamic Affairs, Dawah, and Guidance
122	Ministry of Municipality and Rural Affairs and Housing (including Urban Observatory)
123	Ministry of Health
124	Ministry of Industry and Mineral Resources
125	Ministry of Energy
126	Ministry of Justice
127	Ministry of Human Resources and Social Development (including the National Volunteer Portal)
128	Islamic University of Madinah

Sr.	Entity
129	Imam Abdulrahman bin Faisal University
130	Imam Mohammad bin Saud Islamic University
131	Prince Sattam bin Abdulaziz University
132	Prince Sultan University
133	Princess Nourah bint Abdul Rahman University
134	Al-Qassim University
135	Majmaah University
136	Mustaqbal University
137	AlMaarefa University
138	King Saud University
139	King Abdulaziz University
140	King Abdullah University of Science and Technology
141	King Faisal University
142	Al-Yamamah University
143	Ummul Qura University
144	University of Bisha
145	Jazan University
146	University of Jeddah
147	University of Hail
148	Effat University
149	University of Taibah
Partial Survey of Art Galleries	
150	Catalyst V
151	L'Art Pur
152	Saudi Center for Fine Arts
153	Athr Gallery
154	Ahlam Studio
155	Abstract Art Gallery
156	AMA Art Venue
157	SAMA Creatives Hub – Gallery 015
158	Adham Art Center

Sr.	Entity
159	Art Vision Gallery
160	Medad Art Gallery
161	Hafez Gallery
162	Hewar Art Gallery
163	Rochan Gallery
164	Zaitia
165	Dama Art Gallery
166	Dawi Gallery
167	Alajlan Art Gallery
168	Lakum Artspace
169	Lift Gallery
170	Naila Art Gallery
171	WRD Art Gallery

2. Cultural Participation Survey

During the second quarter of 2022, the fourth iteration of the Cultural Participation Survey was conducted to provide reliable and comparable data on the participation rates of citizens and residents of Saudi Arabia in various cultural fields. The survey metrics were designed based on the European Framework for Community Engagement, which is widely used and compatible with the relevant UNESCO framework. However, modifications and additions were made to suit the local realities and needs of the report. The survey questionnaire comprised 31 questions or variables, along with seven demographic variables (see the 2022 Cultural Participation Survey Appendix). The Cultural Participation Survey continues to follow the same methodologies as previously but with some modifications concerning variables. In addition to the range of attendance rates (reception) for cultural activities (11 variables) focused on in previous reports, the fourth iteration of the survey included a new template to measure the level of practicing cultural activities (11 variables). The survey also measured demand determinants in relation to cultural services and products (7 variables). It assigned only two variables to the template of trends pertinent to cultural education and training this year. Many questions, particularly about attendance rates, focused on defining the period for repeat attendance as "the past twelve months," which is used in several similar surveys to measure cultural



participation (see "Measuring Cultural Participation," 2009, UNESCO).

• Fourth Iteration Survey Data Collection

The data for the 2022 Survey were collected in collaboration with the Saudi Center for Opinion Polling (SCOP) using phone interviews by calling a random sample selected using a simple random sampling from a sample frame for the SCOP through a computer program to generate possible numbers. The sample included 3,060 individuals with an error margin of 1.80%. The survey was conducted from May 17-29, 2023.

- **Survey Population and Sample Characteristics**
The survey was conducted on Saudi individuals and Arab residents, both male and female, who are 18 years and above and residing in the 13 Saudi provinces. The sample population consisted of 71.3% Saudis and 28.7% Arab residents. Table 2 provides a detailed breakdown of the numbers and percentages of the respondents.

Table 2: Number and Percentages of Respondents by Province

Province	Frequency	Percentage
Riyadh	930	30.5%
Makkah	757	24.8%
Madinah	194	6.4%
Al-Qassim	96	3.1%
Eastern Province	487	15.9%
Asir	188	6.1%
Tabuk	87	2.9%
Hail	58	1.9%
Northern Borders	29	1.0%
Jazan	116	3.8%
Najran	41	1.3%
Al-Baha	27	0.9%
Al-Jouf	44	1.5%
Total	3055	100%

- 3. Focus Discussion**

The current edition of the report uses focus discussions (focus groups) to monitor the experiences and opinions of practitioners and experts in the relevant fields. The report aims to employ qualitative data as supplementary material in analyzing and understanding the state of cultural sectors. The focus discussion sessions were conducted on May 21-31, 2023. There was a total of eight sessions, with the majority dedicated to the theme of the report, namely investing in culture (Table 3). In total, 45 individuals attended the sessions, with an average of 5 participants per session.



Table 3: Focus Discussion Sessions

Session	Category
Creativity and Cultural Indicators	Members of juries for cultural competitions
Investment Opportunities in the Cultural Sector	Entrepreneurs and investors in the cultural sector
Investment Regulating Laws in the Cultural Sector	Legal professionals, entrepreneurs, and investors in the cultural sector
Private Sector and Investment Partnerships	Entrepreneurs and investors in the cultural sector
Evaluation of Cultural Infrastructure	Officials in governmental and private bodies in relevant sectors, entrepreneurs, and investors in the cultural sector
Newly Introduced Educational Materials in Culture-1	Secondary school students (male and female)
Newly Introduced Educational Materials in Culture-2	Teachers of arts and critical thinking subjects (male and female)
Virtual Training	Trainers in the cultural field (male and female)

4. Special Surveys

This year's report aimed to use data from central entities and avoid using special or limited surveys like the Libraries Survey and Translation Projects Survey used in previous editions to use more accurate data that aligns with the indicators' definitions. The 2022 report focused on surveying art galleries due to the lack of necessary data to estimate the level of activity in the visual arts sector. There was also a survey of peer-reviewed scientific journals published in Saudi Arabia. Additionally, podcast data were collected using the Google Podcasts application or by directly requesting it from primary sources.

- **Survey of Art Galleries**

A survey was conducted on a sample of available art galleries in Saudi Arabia. The survey included 29 galleries, out of which 24 responded. The other five galleries could not be reached. During the screening process, two galleries were eliminated due to either incorrect information or failing to fit the definition of an art gallery. This means that the report utilized data from 22 art galleries (Table 1). The survey was conducted via email and phone. It included questions about the number and types of art exhibitions held in a year, as well as the number of artworks displayed and the participating artists.

- **Podcast Data Collection**

The data for this study was collected from a purposeful sample of 20 podcasts chosen based on specific selection criteria. The primary focus of each podcast is culture and cultural fields. In addition, each



podcast has more than 1000 followers on X (formerly Twitter) or the production company's account. The data were collected by gathering the number of episodes published in one year either directly from relevant entities or through Google Podcasts.

- **Survey of Research Papers Published in Peer-reviewed Journals in Saudi Arabia**

For this report, a survey was conducted on research papers published in peer-reviewed journals in Saudi Arabia between 2020 and 2022 to evaluate the

scientific research indicators in cultural sectors. The survey included a total of 940 published research papers from 27 peer-reviewed journals (Table 4). These research papers were thematically classified into 29 different subject matters. The survey was conducted in three phases. Firstly, all the research studies published and available in open sources were

collected and cataloged. Secondly, the collected materials were classified into different themes based on the keywords present in the titles and abstract sections. Lastly, the data were processed. It is worth mentioning that a research paper may address one or more subjects, and thus, it can be classified accordingly.

Table 4: Peer-reviewed Journals Surveyed

Sequence	Journal
1	Journal of Language Planning and Policies
2	Journal of Linguistic Studies
3	Journal of Arabic Linguistics
4	Saudi Journal of Library and Information Studies – Princess Nourah University
5	Saudi Journal of Art and Design – Princess Noura University
6	Scientific Journal of King Faisal University, Humanities and Management Sciences
7	Teaching Arabic as a Second Language
8	Journal of Arts, King Saud University
9	Islamic University Journal of Arabic Language and Literature
10	Darah Journal of Arabian Peninsula Studies
11	North Journal of Human Sciences
12	Journal of Human Sciences, King Khalid University
13	Journal of Humanities and Administrative Science, Majmaah University
14	Journal of Educational Sciences, King Saud University
15	Journal of Sharia Sciences and the Arabic Language, Princess Nourah bint Abdulrahman University
16	Journal of Arabic Sciences, Imam Muhammad bin Saud Islamic University
17	Journal of Architecture and Planning, King Saud University
18	Adumatu Journal
19	Al-Baha University Journal for Human Sciences
20	Al-Jouf University Journal for Human Sciences
21	Taif University Journal for Human Sciences
22	Umm Al-Qura University Journal for Language Sciences and Literature
23	Umm Al-Qura University Journal for Engineering and Architecture
24	Journal of Human and Educational Studies, Bisha University
25	Tabuk University Journal of Human and Social Sciences
26	Jazan University Journal of Human Sciences
27	Taibah University Journal for Arts and Humanities



5. Published Reports

The report utilized data from previously published reports, both by governmental entities in Saudi Arabia and international organizations. These include periodic reports, statistical bulletins, and program-based reports. The reports of various organizations, such as the General Authority for Statistics, Saudi Central Bank, and the CDF's annual report 2022, are all examples of the material used to inform the current report better.

6. Media and Social Media Sources

The report obtained data from various sources, including entities and official media agencies such as the Saudi Press Agency. The data were collected from official websites and verified social media accounts affiliated

with the authorities. Additionally, news issued by official media centers was also considered.

7. Case Study

The report was enhanced by a case study conducted by the Prince Mohammed bin Salman College of Business and Entrepreneurship (MBSC). In terms of methodology, the study utilized two methods for data collection. First, preliminary data collected through interviews with representatives from the institutions. Second, data obtained through submitted documents and online processes from the entities included in the study. The collected data were then analyzed in accordance with the study's theme of investing in culture.

Table 5: Entities Involved in the Case Study

Sequence	Entity
1	Thmanyah Publishing and Distribution Company
2	Hayy Jameel
3	Athar Gallery
4	Myrkott Company/Sarab Entertainment
5	Ashi Studio
6	Lomar
7	Print.sa
8	Tashkeel Publishing House

8. Literary Writing and Publishing Movement in Saudi Arabia 2021-2022: A Bibliographic-Bibliometric Study:

The report used data from Khalid Al Yousef's work "Literary Writing and Publishing Movement in Saudi Arabia 2021-2022: A Bibliographic-Bibliometric Study" to measure the literary publishing indicator. The book focuses on Saudi literary production in 2022, works explicitly published in print with reference to some digital books, if any. The author collected the bibliography from three sources: books he purchased or received as gifts, news about new publications available in open sources such as newspapers, magazines, and websites, and contacts with book collectors.

Fifth: Notes on Data Collection and Use

To ensure the accuracy of the report's data, the latest available update was used as a baseline instead of the current year's data. This was necessary for certain types of data not collected on an annual basis, such as the data on culture expenditure published every five years by the General Authority for Statistics. Additionally, some data required more time to be processed and used consistently, such as education data, which was classified and processed by the MoC's General Administration for the Development of Cultural Capacities before being used in the report.

1. Education Data 2021

The Knowledge and Skills Chapter of the report used data from 2021, as the 2022 data still needed to be processed and classified by the MoC's General Administration for the Development of Cultural Capacities of the National Partnerships Agency. The data were collected and classified according to the MoC's partnership with the

Ministry of Education and the Technical and Vocational Training Corporation. By adhering to the data unification and classification standards, the report used the available data from the partnerships, which was the 2021 data. This ensures that consistent and smooth data collection and processing will be maintained in future editions of the report.

2. Rate of Household Expenditure on Cultural Activities and Products: Preliminary Estimates for 2021

Household spending on cultural activities and related goods and services can provide valuable insights into local demand and the purchasing power of citizens. Since the data update cycle is longer than a year, the current edition of the report utilized the 2021 preliminary estimates of household consumption data, which are the most recent available data. These estimates have been obtained from the Annual Bulletin for National Accounts, 2021, issued by the General Authority for Statistics.

3. Data of Cultural Workers, Q3 2022

The report's cultural professions indicator in the Creative Economy Chapter used the data of cultural workers in the third quarter of each year collected and classified by the MoC's General Administration for the Development of Cultural Capacities. The data for the fourth quarter of 2022 were yet to be available at the time of writing the report.

Sixth: Lists of Aggregated Data

Data collected from various sources were integrated into the report to ensure a more comprehensive analysis, including information on art exhibitions organized by universities (Table 6).



**Table 6:** Entities that Presented Data on Art Exhibitions in Universities

Sequence	University
1	Princess Nourah bint Abdulrahman University
2	King Abdullah University of Science and Technology
3	University of Hail
4	King Faisal University
5	Umm Al-Qura University
6	Al-Qassim University
7	Prince Sattam bin Abdulaziz University
8	University of Bisha
	Jazan University

Seventh: Notes on the Classification Lists

The report aims to create a comprehensive statistical reference for the cultural sector in Saudi Arabia. To achieve this, it uses a list of classifications from international organizations like UNESCO and the EU to control the process of measuring cultural indicators. Additionally, the report relies on a classification approach created by the MoC's General Administration for the Development of Cultural Capacities in collaboration with local stakeholders to classify (1) educational programs and majors and (2) cultural professions. These classifications resulted from the efforts to regulate the cultural sector and create standardized classifications and lists that align with national

and international references.

1. Educational Programs on Culture and Arts

To ensure consistency of data and enable effective collection, analysis, and comparison in the forthcoming editions of the report, the current edition adopted, with latitude, the classification developed by the MoC's General Administration for the Development of Cultural Capacities (Table 7). This classification was chosen due to its alignment with the unified classification system established in partnership with the Ministry of Education and the Technical and Vocational Training Corporation. The classification was only slightly adapted to fit the report's requirements.

Table 7: Educational Programs and Majors as per the Classification of the MoC's General Administration for the Development of Cultural Capacities

Sector	Major
Architecture and Design	Advertisement and marketing communications
	Urban and regional planning
	Innovative design of advertisement
	Graphic design and digital media
	Interior design
	Design and printing
	Architecture
	Architecture engineering
	Product design
	Architectural engineering technology
	Urban and regional planning
Culinary Arts	Hotel management
	Nutrition and food sciences
	Food production (cooking)
Fashion	Sewing and tailoring
	Clothes and textile
	History of clothes and embroidery
	Fashion and textile design
Films and Theater	Radio, television, and film
	Digital and visual production
	Makeup
	Cinema and theater
General	Event management and organization
Heritage	Heritage resources management
	Tangible heritage
	Tourism Guidance
	Engraving, carving, and decoration
	Construction engineering and management

Sector	Major
Libraries	Document management and electronic archiving
	Information resources and services management
	Library and information sciences
Literature, Publishing, and Translation	Literature, criticism, and rhetoric
	Translation
	Primary education – Arabic language
	Spanish language
	German language
	English language (General)
	English language and literature
	English language and translation
	English language (Education)
	Turkish language
	Russian language
	Chinese language
	Hebrew language
	Arabic language (Education)
	Arabic language for non-native speakers
	Arabic literature
	Persian language
	French language and translation
	Japanese language
	Applied linguistics
	Computational linguistics
	Arabic linguistics
	Grammar
	Linguistic studies

Sector	Major
Museums	Sociology (education)
	History
	Geography
	Human geography
	Sociology
	Anthropology
	Geographic information systems
Visual Arts	Visual arts
	Art education
	Photography
	Drawing and arts

2. Cultural Professions

When analyzing the employment indicators in the cultural sectors, we used the classification system adopted by the MoC's General Administration for the Development of Cultural Capacities. This system is based on the unified Saudi classification of occupations prepared by the General Authority for Statistics and is aligned with the International Standard Classification of Occupations (ISCO-08). The system is consistent with the previous classification system used by the Ministry of Human Resources and Social Development. Two categories were developed to define cultural occupations: direct and indirect cultural professions.

Direct cultural professions are jobs where all employees are intrinsically related to culture, while indirect professions only involve a portion of the job related to cultural activity.

The definition of cultural professions follows the division of sectors associated with cultural commissions, as it is a division that meets the needs of national policies in developing what is defined locally as a cultural sector. Therefore, for example, professions such as chef and barista were counted within the cultural workforce because the culinary arts sector, unlike other international models, is considered an integral part of the cultural sector in Saudi Arabia.







Appendix (2): 2022 Cultural Participation Survey

1. Have you visited any museums in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	10.30
Yes, 4-7 times	1.10
Yes, more than 7 times	1
No, I did not	11.50
No, but I would like in the future	76.10
Total	100.00

2. Have you attended any poetry evenings or literary events in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	5.20
Yes, 4-7 times	1.10
Yes, more than 7 times	0.50
No, none at all	24.30
No, but I would like in the future	68.90
Total	100.00

3. Have you attended any concerts or musical events in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	12.90
Yes, 4-7 times	1.80
Yes, more than 7 times	1.10
No, I did not	41.90
No, but I would like in the future	42.30
Total	100.00

4. Have you visited any public libraries (not bookstores) in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	16.60
Yes, 4-7 times	2.80
More than 7 times	2.90
No, I did not	14.70
No, but I would like in the future	63.00
Total	100.00

5. Have you visited any historical or archaeological sites in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	26.40
Yes, 4-7 times	4.70
More than 7 times	3.80
No, I did not	8.60
No, but I would like in the future	56.50
Total	100.00

6. Have you visited any natural parks or reserves in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	21.40
Yes, 4-7 times	6.80
More than 7 times	6.00
No, I did not	9.50
No, but I would like in the future	56.30
Total	100.00

7. Have you attended any festivals or cultural events in the Kingdom in the past 12 months?

	Percentage
Yes, 1-3 times	19.60
Yes, 4-7 times	3.10
Yes, more than 7 times	1.70
No, I did not	15.80
No, but I would like in the future	59.80
Total	100.00

8. If your answer to question (7) is "yes," what was the main reason you attended this event?

	Percentage
Accompanying family and friends	46.40
Suitable timing	14.40
Free or reasonable ticket price	14.00
Visiting different places	10.80
Good organization and easy entry	6.20
Other	8.20
Total	100.00



9. If your answer to question (7) is "no," what was the main reason you did not attend?

	Percentage
Work engagements	41.20
Lack of time	36.20
Expensive tickets	19.30
Lack of advertising	9.90
Lack of transport	9.30
Poor financial situation (not to be read aloud)	7.20
Health issues	5.70
Not where I live (not to be read aloud)	5.70
Prefer other activities (health, educational)	5.00
Safety concerns	1.40
Men-women mingling (not to be read aloud)	1.00
Other	6.00
Total	147.90

10. Have you attended any plays or other performances in the past 12 months?

	Percentage
Yes, 1-3 times	6.80
Yes, 4-7 times	0.50
Yes, more than 7 times	0.20
No, I did not	27.40
No, but I would like in the future	65.10
Total	100.00

11. Have you attended any art exhibitions in the past 12 months?

	Percentage
Yes, 1-3 times	9.70
Yes, 4-7 times	0.70
Yes, more than 7 times	0.30
No, I did not	23.20
No, but I would like in the future	66
Total	100.00

12. Have you practiced any artwork, such as drawing or sculpture, in the past 12 months?

Percentage	
Yes, professionally	1.80
Yes, amateurishly	11.10
No, but I would like in the future	42.40
No, and I am not interested	44.70
Total	100.00

13. How many books have you read (not for study or work) in the past 12 months?

Percentage	
1-3 times	33.90
4-7 times	11.60
8-11 times	5.10
None in the past 12 months	33.10
I never read books (not to be read aloud)	12.00
Other (more than 11/not to be read aloud)	4.30
Total	100.00

14. Have you played any musical instruments in the past 12 months?

Percentage	
Yes, professionally	0.60
Yes, amateurishly	9.90
No, but I would like in the future	25.10
No, and I am not interested	64.40
Total	100.00

15. Have you practiced cooking in the past 12 months?

	Percentage
Yes, professionally	12.10
Yes, amateurishly	70.80
No, but I would like in the future	6.60
No, and I am not interested	10.50
Total	100.00

16. Where do you usually find recipes for the Saudi dishes you cook well?

	Percentage
Family, relatives, and friends	57.10
The Internet	30.30
I already know them (not to be read aloud)	6.10
Cookbooks	2.20
TV or radio	1.70
I don't cook Saudi dishes (not to be read aloud)	2.40
Other (not to be read aloud)	0.20
Total	100.00

17. Have you practiced any handicrafts in the past 12 months?

	Percentage
Yes, professionally	4.40
Yes, amateurishly	13.00
No, but I would like in the future	47.10
No, and I am not interested	35.50
Total	100.00

18. Have you read any e-books in the past 12 months?

	Percentage
Yes	33.30
No	27.10
No, but I would like in the future	39.60
Total	100.00

Appendices

19. Have you shared any cultural content online (social media, YouTube, or other websites) in the past 12 months?

Percentage	
Yes, poetry or literary writing	6.2
Yes, singing or playing an instrument	1.8
Yes, acting and performing	0.8
Yes, artwork or designs	3.8
Other (mention them)	1.2
No	88.5
Total	102.2

20. Have you created a website or blog for cultural purposes in the past 12 months?

Percentage	
Yes	2.80
No	51.40
No, but I would like in the future	45.90
Total	100.10

21. Have you downloaded any photos, music, films, or videos from the Internet in the past 12 months?

Percentage	
Yes, photos	28.6
Yes, music	20.4
Yes, films	16.1
Yes, video clips	7.5
No	40.1
No, but I would like in the future	18.4
Total	131.1

22. Have you listened to any audiobooks in the past 12 months?

Percentage	
Yes	21.0
No	79.0
Total	100.0

23. What type of cultural events do you wish to be held more often?

	Percentage
Lectures and symposiums	22.70
Poetic or literary evenings	22.30
Heritage	18.80
Theatrical performances	14.20
Concerts	13.40
Other	2.00
None (not to be read aloud)	6.60
Total	100.00

24. What has been your favorite way of watching films in the past 12 months?

	Percentage
TV	25.1
Cinema	22.8
Videotape or disc	0.4
Streaming platforms (e.g., Netflix and Shahid)	28.3
I never watch films	23.3
Total	100.0

25. What has been your favorite way of listening to music in the past 12 months?

	Percentage
Online video platforms (e.g. YouTube)	22.4
Non-subscription digital platforms (e.g. SoundCloud)	15.1
Attending concerts	8.7
TV	8.3
Radio	7.2
Subscription digital platforms (e.g. Spotify and Anghami)	5.8
CDs	1.9
I never listen to music	30.6
Total	100.0

26. How satisfied are you with the ticket prices for cultural events and activities?

	Percentage
Not at all satisfied	9.1
Not satisfied	25.5
Satisfied	27.6
Completely satisfied	5.7
I don't know (I didn't attend any/there were no events) (not to be read aloud)	32.2
Total	100.0

27. How satisfied are you with the availability of festivals and cultural events where you live?

	Percentage
Not at all satisfied	6.3
Not satisfied	20.5
Satisfied	44.7
Completely satisfied	18.3
I don't know (not to be read aloud)	10.3
Total	100.0

28. How satisfied are you with the availability of cultural facilities (libraries, museums, art exhibitions, and theaters) where you live?

	Percentage
Not at all satisfied	4.9
Not satisfied	21.0
Satisfied	48.7
Completely satisfied	17.8
I don't know (not to be read aloud)	7.6
Total	100.0

29. How much do you spend monthly on leisure (restaurants, cafés, cinemas, and recreational activities)?

Percentage	
0-500	40.8
501-1,000	20.9
1,001-1,500	10.7
1,501-2,000	9.2
More than 2,000	18.4
Total	100.0

30. Have you joined any cultural training program, course, or virtual workshop in the past 12 months?

Percentage	
Yes	5.3
No (go to General Information)	94.7
Total	100.0

31. If your answer to question (30) is "yes," what kind of program or virtual workshop was it? (You may choose more than one answer.)

Percentage	
Creative writing, literary writing, content writing	40.4
Music (singing, playing an instrument)	9.4
Photography and film	7.2
Theater and acting	6.1
Art and drawing	21.8
Heritage and traditional crafts	19.6
Other (mention them)	8.6
Total	113.0



Appendix (3): Glossary

Arabic	Term	Definition	Reference	Percentage
الآثار	Antiquities	Fixed, movable, buried, or submerged objects within the borders of the Kingdom, in its maritime areas under its sovereignty or jurisdiction, constructed, manufactured, produced, designed, or painted by humans, and which have acquired archaeological significance through human intervention over time, with a history dating back at least one hundred years.	Heritage Portfolio (Heritage Commission)	Management and Preservation
التنقيب عن الآثار	Archaeological excavation	Any excavation, probing, exploration, or diving activity scientifically conducted to discover antiquities underground, on the surface, in watercourses, lakes, or marine areas.	Cultural System Glossary	Management and Preservation
المسح الأثري	Archaeological survey	All activities related to the exploration and documentation of archaeological sites using various scientific methods, whether on the surface, underground, or underwater.	Cultural System Glossary	Management and Preservation
الأعمال المعمارية	Architectural works	Works done to complete buildings, bridges, gates, or other structures according to an architectural plan.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production
الأرشفة	Archiving	Activities involving the identification, evaluation, description, storage, preservation, management, and retrieval of digital records to maintain their integrity over time.	Cultural System Glossary	Management and Preservation
المعرض الفني	Art exhibition	A collection of artistic works displayed, mostly temporarily, in art or commercial galleries, open spaces, or other display venues, whether for one artist or a group of artists.	Report Definition	Cultural Creation and Production

Arabic	Term	Definition	Reference	Percentage
المصنفات الفنية والفنية التطبيقية	(Applied) artworks	Artistic artworks refer to two-dimensional artworks; applied artworks refer to three-dimensional artworks.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production
الإقامة الفنية	Artistic residency	A program that hosts a group of creative individuals in various cultural fields to reside and work outside their domicile, providing housing, financial and personal support, professional guidance, and opportunities to integrate with the host region and interact with the surrounding environment.	Ministry of Culture – National Partnerships and Development Agency	Management and Preservation
المصنف	Artistic work	Any literary, scientific, or artistic work.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production
التعليم المدمج	Blended learning	An e-learning method that combines face-to-face and distance learning to achieve educational content objectives, with the varying hybrid ratio according to objectives, needs, and capabilities.	Guidance Manuals for the Secondary Education Pathways System, Ministry of Education	Knowledge and Skills
الملابس المحافظة	Conservative clothing	Clothing designed to be modest and the least revealing, including long sleeves and loose-fitting garments.	Fashion Commission	Cultural Creation and Production
الأنشطة الثقافية	Cultural activities	Activities that embody or convey forms of cultural expression, irrespective of their commercial value. Cultural activities may be an end in themselves or may contribute to the production of cultural commodities and services.	2009 UNESCO Framework for Cultural Statistics	Cultural Participation

Arabic	Term	Definition	Reference	Percentage
معدلات حضور الأنشطة الثقافية	Cultural attendance rates	Percentage of the population who have participated at least once in a going-out cultural activity in the past twelve months.	Cultural Indicators 2030	Cultural Participation
المرافق الثقافية	Cultural facilities	Legally established structures, spaces, and their complementary elements in which various cultural activities are carried out in accordance with the cultural fields adopted by the Ministry of Culture.	Cultural System Glossary	Management and Preservation
التراث الثقافي	Cultural heritage	The tangible and intangible aspects of cultural heritage for local communities passed down through generations and acquired historical, religious, artistic, or cultural value for those communities.	Cultural System Glossary	Management and Preservation
حصر التراث الثقافي	Cultural heritage inventory	Inclusion of cultural heritage assets and elements in the State Register for a clear and shared understanding of culturally significant elements for preservation and management. The list includes basic information, such as name, location, history, origin, etc.	Cultural System Glossary	Management and Preservation
المشاركة الثقافية	Cultural participation	Any deliberate action by an individual to obtain or participate in a cultural activity, such as seeking information about culture, expressing oneself through cultural products or activities, or spending on cultural services or products.	Cultural System Glossary	Cultural Participation
المنتج الثقافي	Cultural product	A product distinguished from other commodities and services by its artistic, aesthetic, symbolic, and spiritual values.	2009 UNESCO Framework for Cultural Statistics	Cultural Creation and Production
معدلات الزيارات للمرافق الثقافية	Cultural site visit rate	Number of visits to selected cultural sites or performing arts venues.	Cultural Indicators 2030	Cultural Participation
السياحة الثقافية	Cultural tourism	Tourist trips involving one or more cultural activities, such as visiting museums and exhibitions, festivals and cultural events, heritage sites, or reserves.	Cultural System Glossary	Cultural Participation

Arabic	Term	Definition	Reference	Percentage
الدورة الثقافية	Culture cycle	The cultural production resulting from a series of interlinked processes or stages that together form the cultural cycle, value chain, or supply chain.	2009 UNESCO Framework for Cultural Statistics	Cultural Creation and Production
المقرر الدراسي	Curriculum	A set of organized and selected knowledge (value-based information, skills, and attitudes) that learners must acquire through formally and informally regulated learning experiences.	Cultural Indicators 2030	Knowledge and Skills
ديمي كوتور	Demi-couture	Clothing made according to the haute couture principles but sold as ready-to-wear clothing.	Fashion Commission	Cultural Creation and Production
الإيداع	Deposit	Depositing copies of works subject to this system, if intended for publication and circulation, at the King Fahd National Library for free as a mandatory requirement.	King Fahd National Library (Deposit System)	Cultural Creation and Production
الدورة التطويرية	Development course	A training program that lasts no more than one month and 60 training hours.	General Organization for Technical and Vocational Training, General Administration for Private Training	Knowledge and Skills
الكتاب الرقمي	Digital book	A book in an electronic digital format (e.g., Portable Document Format (PDF) or Interactive EPUB format) computationally displayed using specialized software and devices to be accessible to individuals.	Dictionary of Curriculum Terminology and Teaching Methods Terminology (ALECSO)	Cultural Creation and Production
الإذاعة الرقمية (البودكاست)	Digital radio (podcast)	Periodic episodes of digital audio files on a specific area or topic produced by individuals or institutions and broadcast over the internet on specific platforms and applications to reach the target audience.	Literary Podcasts in the Saudi Cultural Scene	Cultural Creation and Production
التعليم عن بعد	Distance learning	Learning through a mix of technologies where learners and teachers are separated geographically, temporally, or both.	Guidance Manuals for the Secondary Education Pathways System, Ministry of Education	Knowledge and Skills

Arabic	Term	Definition	Reference	Percentage
البرنامج التعليمي	Educational program	A coherent or consecutive set of educational activities designed and organized to achieve predetermined learning objectives or accomplish a specific set of educational tasks over a sustained period.	ISCED Fields of Education and Training	Knowledge and Skills
الفيلم الطويل	Feature film	An audiovisual content and a form of narrative art of 40 minutes or longer, distributed through appropriate means and media for public screening.	Standard Definitions for Films (Film Commission)	Cultural Creation and Production
المسار العام	General education pathway	A secondary educational pathway that aims to provide students with knowledge, skills, and positive attitudes toward specializations related to religious, humanistic, natural, and applied sciences and promote integration between scientific and humanistic fields.	Secondary Education Pathways, Ministry of Education	Knowledge and Skills
صون التراث	Heritage preservation	Actions aimed at ensuring the viability of intangible cultural heritage elements and transmission thereof to future generations. This includes their identification, definition, documentation, searching, preservation, protection, promotion, and enhancement, primarily through formal and informal education and revitalization of its various aspects.	Cultural System Glossary	Management and Preservation
المواقع التاريخية	Historical sites	Sites that bear witness to historical or national events or those mentioned in cultural heritage but do not necessarily have visible or buried antiquities.	Cultural System Glossary	Management and Preservation
الممارسة الثقافية الفردية	Individual cultural activities	Percentage of the population who participated at least once in cultural activities at home in the last 12 months (including using the internet for cultural purposes).	Cultural Indicators 2030	Cultural Participation
التراث الثقافي غير المادي	Intangible cultural heritage	Practices, traditions, forms of expression, knowledge, and skills inherited from our ancestors, such as oral traditions, performing arts, social practices, ceremonial events, practices related to nature and the universe, or knowledge and skills related to traditional crafts production.	Heritage Portfolio (Heritage Commission)	Management and Preservation

Arabic	Term	Definition	Reference	Percentage
السياسات اللغوية	Language policies	A corpus of ideas, laws, regulations, rules, and practices to bring about language change in a society, group, or system.	Book on Language Policy and Planning	Management and Preservation
اختبار الكفاءة اللغوية	Language proficiency test	Structured test to assess the Arabic language proficiency of non-native speakers, measuring the four skills (reading, listening, writing, and speaking) as per international practices and in line with the Common European Framework of Reference for Languages (CEFR).	Education and Training Evaluation Commission	Management and Preservation
المكتبة	Library	A systematically organized collection of printed books, periodicals, or other handwritten or audiovisual documents, and services provided by staff responsible for making these documents available to readers and facilitating their use for informational, research, educational, or entertainment purposes.	Cultural System Glossary	Management and Preservation
النشر الأدبي	Literary publishing	Published literary works, including novels, short stories, plays, poems, criticisms, biographies, travel literature, and translated literary works.	Al-Yusuf, Literary Publishing and Creation Movement	Cultural Creation and Production
المركز الثقافي متعدد الاستخدام	Multipurpose cultural center	A center specialized in cultural and artistic activities and may include multiple cultural facilities, such as a library, museum, and theater.	Derived from the portfolio of Cultural Vitality in Arab Cities	Management and Preservation
المتحف	Museum	A place open to the public at specific times where archaeological, artistic, cultural, historical, or scientific materials are permanently displayed to achieve cultural, educational, or recreational objectives. Otherwise, any other materials shall be dubbed "private collection."	Implementing Regulations for Museums	Management and Preservation
التراث الثقافي الطبيعي	Natural cultural heritage	Geological or physiographic formations and habitats of endangered flora and fauna that have an aesthetic, scientific, or cultural value (natural heritage shall be universal if it contains an outstanding universal value).	Cultural System Glossary	Management and Preservation

Arabic	Term	Definition	Reference	Percentage
المحميات الطبيعية	Natural reserves	Land, marine, or coastal areas explicitly designated by the Ministry of Environment, Water, and Agriculture and the National Wildlife Development Center for protecting and developing natural organisms.	Executive Regulations for Environmental System	Management and Preservation
المنظمات الثقافية غير الربحية	Non-profit cultural organizations	The ecosystem of civic activities, volunteer services, and nongovernmental organizations that are essentially non-profit and aim to achieve public or specific purposes in the cultural field.	Organigram of the National Center for Non-Profit Sector – Organigram Details – Expert Commission	Cultural Participation
العرض الأدائي	Performance art	A live performance for an audience that showcases intangible creation, harmonizing body language with rhythm and sound, and performed by professionals or amateurs, individually or collectively, on various occasions, such as dance, opera, and puppet theater.	Arts Curriculum – Secondary Second Year – (Ministry of Education)	Cultural Creation and Production
مصنفات الصور الفوتوغرافية	Photographic artistic work	The capture of light or another ray on any medium an image may be produced on or from by any means and not part of a film.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production
الأعمال التخطيطية	Planning activities	Artistic, scientific, mechanical, or engineering drawings containing a sufficient amount of visual or graphic material.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production
النشر	Publishing	Making information available to the public through various means, such as printed copies, websites, or other electronic applications.	Ministry of Culture Glossary (British National Archives)	Cultural Creation and Production
الدورة التأهيلية	Qualification course	A training program for more than a month and less than a year, with more than 60 training hours.	General Organization for Technical and Vocational Training, General Administration for Private Training	Knowledge and Skills
الفيلم السعودي	Saudi film	A film that meets several criteria, including Saudi producers, actors, content, filming locations, and majority of intellectual property rights. The criteria for classifying the film vary depending on its intended use.	Standard Definitions for Films (Film Commission)	Cultural Creation and Production

Arabic	Term	Definition	Reference	Percentage
الأدب السعودي	Saudi literature	Literary works published by Saudi authors issued by publishing houses inside or outside the Kingdom.	Al-Yusuf, Literary Publishing and Creation Movement	Cultural Creation and Production
الأغنية السعودية	Saudi song	Songs performed by a Saudi artist.	Report Definition	Cultural Creation and Production
الفيلم القصير	Short film	An audiovisual content and a form of narrative art of less than 40 minutes distributed through appropriate means and media for public screening.	Standard Definitions for Films (Film Commission)	Cultural Creation and Production
الاندماج الاجتماعي	Social inclusion	This dimension frames assessing the contribution of culture in building social cohesion and fostering inclusion and participation. It focuses on people's abilities to access culture, the right of all to participate in cultural life, and their freedom of cultural expression.	Cultural Indicators 2030	Cultural Participation
المسارات التخصصية	Specialized pathways	Four new specialized pathways in the school system that meet the demands of the 21st century and allow students to choose the pathway that best suits their interests, attitudes, and abilities.	Secondary School Pathways, Ministry of Education	Knowledge and Skills
السنة المشتركة	Joint year	The first academic year in the educational pathway system, which includes a set of common subjects all students study.	Guidelines for the Secondary Education Pathway System, Ministry of Education	Knowledge and Skills
التنمية المستدامة للتراث	Sustainable heritage development	Heritage is linked to sustainable development via two principles: heritage sustainability requires its protection and transmission to future generations, and it is a means through which heritage contributes to sustainable development.	UNESCO, World Heritage Management	Management and Preservation
العرض المسرحي	Theatrical performance	A form of performing art that converts a written theatrical text (prose or poetry) into a live performance on stage, performed by actors before an audience.	Arts Curriculum – Secondary Second Year – (Ministry of Education) / Theater Commission	Cultural Creation and Production
أعمال الطبوغرافيا الجسمة	Stereotopography works	Three-dimensional designs and models depicting topography, science, and geography, possibly including visual or graphic data.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production


Arabic	Term	Definition	Reference	Percentage
الدبلوم التدريبي	Training diploma	A training program that lasts two to three years.	General Organization for Technical and Vocational Training, General Administration for Private Training	Knowledge and Skills
البرنامج التأهيلي	Training program	A training program that lasts one to less than two years.	General Organization for Technical and Vocational Training, General Administration for Private Training	Knowledge and Skills
الترجمة	Translation	Rendering the source language text into another language without distorting or changing the original meaning.	Cultural System Glossary	Cultural Creation and Production
الكود العمراني	Urban code	A set of guidelines for design elements that incorporate local urban characteristics and desired identity in urban development.	Requirements for Popular Markets (Ministry of Municipal and Rural Affairs and Housing)	Management and Preservation
التراث العمراني	Urban heritage	All man-made cities, villages, neighborhoods, and buildings, including spaces, installations, and pieces that have architectural, historical, scientific, cultural, or national value.	Cultural System Glossary	Management and Preservation
استخدام الانترنت لأغراض ثقافية	Using the internet for cultural purposes	Percentage of people who engaged in one of the following activities in the last 12 months: reading online news; downloading games, images, film, or music; creating or reading websites or blogs.	Cultural Indicators 2030	Cultural Participation
الفصول الافتراضية	Virtual classrooms	Online classrooms that resemble traditional classrooms where teachers and students collaborate without time or location constraints.	Guidance Manual for Evaluation and Admission – Pathways System, Ministry of Education	Knowledge and Skills
المصنفات المكتوبة	Written works	Works expressed in words, regardless of their content, such as books, pamphlets, and similar articles covering literary, scientific, and artistic fields.	Guidance Manual for Registering Copyright Works (Saudi Authority for Intellectual Property)	Cultural Creation and Production



Entities involved in providing the report data







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