

# Entertainment parks industry: Trends & opportunities for Saudi Arabia

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# Entertainment parks industry: resurgence and growth

The entertainment parks industry, with over 140 years of history, draws more than 500 million visits annually on a global basis. This sector encompasses a wide array of parks ranging from small amusement parks, offering diverse attractions, to larger-scale theme and water parks centered around a specific theme or iconic intellectual properties (IP).

Despite a 67% drop in attendance during the COVID-19 pandemic<sup>1</sup>, the entertainment parks industry has swiftly recovered, driven by surging demand. First, and in the wake of the pandemic, entertainment parks have seen a significant boost in domestic visits. For instance, as pandemic-era restrictions began to subside, Orlando, a major theme park hub, achieved huge gains in attendance, primarily thanks to the strength of the domestic market. Additionally, high international interest has further fueled the demand worldwide post pandemic, leading to increased international tourism as compared to 2019 levels. Major theme parks in China, for example, have seen international and domestic tourist trips increase in total by 11.5% year-on-year<sup>2</sup> from 2020 to 2021, illustrating the sector's robust growth. As a result, the forecasted attendance for global theme parks in 2024 is expected to increase by 23% compared to 2019, underscoring the dynamic expansion within the industry and its promising future projections.

The robust expansion of this industry is evident worldwide, with significant new projects both completed or in the pipeline. Notable developments over the past few years included the opening of Universal Studios Beijing in

September 2021, making it one of the largest theme parks globally, and Disneyland Paris' €2 billion expansion plan<sup>3</sup>, featuring new themed areas for Frozen, Star Wars, and Marvel. Universal Studios Japan has also seen the addition of Super Nintendo World in 2021<sup>4</sup> significantly boosting visitor numbers and interest. Looking ahead, several massive projects are on the way. For example, Disney has recently announced several expansions across its existing parks<sup>5</sup>, including the largest expansion in Magic Kingdom's 53-year history, featuring a new land dedicated to classic Disney villains and another area focused on Pixar's Cars movie. Additionally, Yas Waterworld in Abu Dhabi has announced a significant expansion set to be completed by 2025, which will increase guest capacity by 20%<sup>6</sup> marking a significant expansion in the GCC. Six Flags is also set to open its first park outside the US, in Saudi Arabia<sup>7</sup>. These developments highlight even further the dynamic growth and increasing demand for these destinations.

The future of the entertainment parks industry looks promising, with ongoing innovation and expansion ensuring its place as a thriving and dynamic sector. The theme park market currently accounting for more than USD 70 billion is expected to grow at an estimated CAGR (compound annual growth rate) of 5% over the next ten years<sup>8</sup>. Some of the key trends driving this growth include continued investment in popular intellectual properties, advancements in ride technology, and enhanced visitor experiences. These innovations ensure that entertainment parks remain a vibrant and expanding industry, also leading to various operational changes aimed at enhancing efficiency.

1. Source: Theme Index / Museum Index: Global Attractions Attendance Report, AECOM, 2020
2. Theme parks celebrate business boom amid China's tourism recovery, Chinadaily, 2023
3. Transformative Multi-Year Expansion Announced for Disneyland Paris, The Walt Disney Company, 2018
4. Super Nintendo World at Universal Studios Japan Grand Opening February 4 2021, USJ, 2020
5. Disney Parks announces Lion King ride for Disneyland Paris, BBC, 2024
6. Yas Waterworld expansion to add thrilling new experiences, Gulf Business, 2023
7. Six Flags Saudi Arabia, Six Flags, 2018
8. Theme Park market growth opportunities & forecast, 2024-2034, Future Market Insights, 2024

# Global market trends and influences

The entertainment park industry is entering an exciting era of intense expansion and innovation, driven by surging demand and massive competition. Diverse global market trends are reshaping entertainment

offerings, visitor experiences, and industry operations, propelling the sector into a dynamic period of growth (Exhibit 1).

## Exhibit 1- Five global trends reshaping the Theme Park industry



### Sophisticated & gamified experiences

Interactive gameplay, VR and AR technologies to create immersive experiences and boost visitor engagement



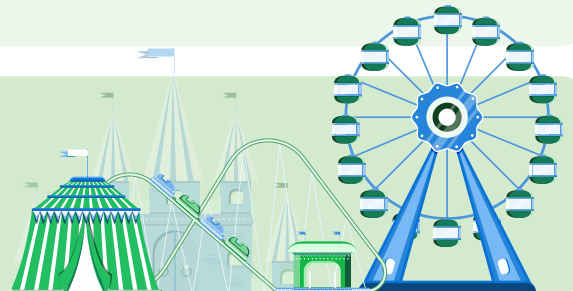
### IP driven development

Popular IPs leveraged for theming to help create new concepts, attract fans, & strengthen brand engagement



### Dynamic pricing

Demand-based price adjustments to balance attendance and optimize revenues during off and on-peak times



### Tech enabled journey

Mobile apps, wearables and AI-powered personalization to enhance visitor experience



### Sustainability & accessibility

Sustainable and inclusive practices to minimize environmental impact and ensure accessibility

## Sophisticated & gamified experiences

The increased sophistication in attractions has become a hallmark of the entertainment parks industry, with flagship parks worldwide leveraging technology ranging from virtual reality to gamification features and accessories. For example, at Universal Studios' Super Nintendo World, guests can collect digital stamps and coins through mobile apps and power bands. This trend extends beyond theme parks into water parks, where VR-enabled attractions are gaining popularity. In 2022, there were around 27 VR-enabled attractions in water parks globally, nearly tripling from 2019. These features transform traditional rides into highly engaging experiences, ensuring parks remain competitive by offering unique & attractive experiences to guests.

## IP-driven development

Increasingly, entertainment parks are themed around popular movie, TV show, and video game intellectual properties (IPs), significantly boosting visitor interest and driving higher attendance. For instance, Disney has capitalized on the massive popularity of its classic fairy tales with themed zones like Fantasyland in Disneyland Paris. Recently, Disney has unveiled unique IP-driven offerings, including the world's first Zootopia-themed show, set to debut in winter 2025, and other IP-themed attractions complemented by retail and F&B<sup>9</sup>. Universal Studios is also continuously adding new features to its IP-driven offerings with popular Harry Potter-themed lands. Furthermore, Super Nintendo World, which leverages beloved Nintendo characters and settings, is now expanding beyond Japan and Hollywood, with new openings planned in Orlando and Singapore,

9. Zootopia Show Opening Winter 2025 at Disney's Animal Kingdom, Blog Mickey, 2024

further highlighting the power of IP-driven development. This trend is also being integrated into the in-park and park-adjacent hospitality concepts with IP themed hospitality offerings growing at a 20% CAGR over the last 20 years.

## Dynamic pricing

Entertainment parks are increasingly adopting dynamic pricing strategies to optimize revenue and manage crowd levels by varying prices based on demand, timing, and seasonality. This approach not only helps balance attendance, but also makes these destinations attractive to visitors by offering more affordable options and improving their experience through better crowd management and reduced wait times.

## Tech-enabled journey

Entertainment parks are leveraging a wide range of technologies to facilitate and enhance their guests'

experience from planning to the visit itself. For instance, SeaWorld's mobile app provides personalized recommendations, park directions, real-time updates on wait times, and show schedules. Similarly, in 2021, Disney introduced their "Genie+ service" offering virtual queuing and personalized itineraries. These innovations help meet rising visitor expectations, maintain a competitive edge in the industry and create additional sources of revenue.

## Sustainability and accessibility

Parks are enhancing eco-friendly practices to appeal to environmentally conscious consumers. For example, LEGOLAND uses solar panels and water recycling systems, while Chimelong Water Park in China integrates energy-efficient water pumps and solar heating.

Additionally, entertainment parks are focusing on accessibility and inclusivity. For example, Morgan's Wonderland in Texas serves as an industry model, with all rides and attractions designed specifically to accommodate people with special needs.



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# Surging interest in Saudi Arabia

## Vision 2030

Until recently, Saudi Arabia's entertainment sector has been limited, with few options for leisure and recreational activities. But in 2016, Vision 2030 was launched with three primary pillars: a vibrant society, a thriving economy, and an ambitious nation.

A key goal under the second pillar is to diversify Saudi Arabia's economy by fostering growth in multiple sectors, including entertainment and tourism. Development in these sectors focuses on two areas relevant to this discussion. The first is enhancing local tourism to cater to the domestic population, aiming to keep leisure spending within the country. The second is boosting the Kingdom's appeal as a global entertainment destination, seeking to attract a diverse and international audience.

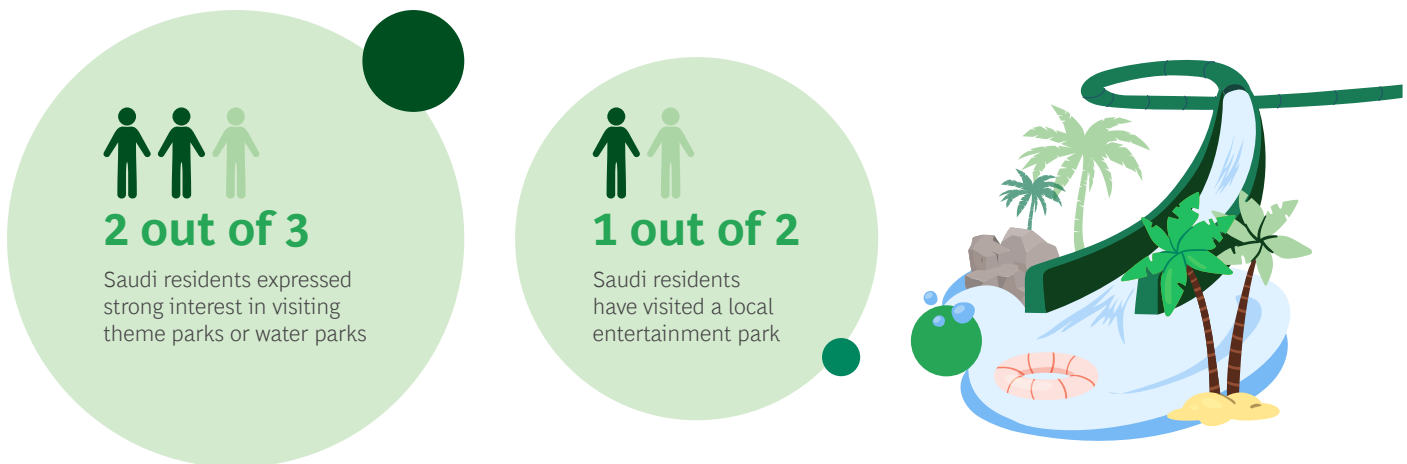
Expanding and enriching entertainment options is also aligned with the first pillar – a vibrant society. With on average 50% of the Saudi population under the age of 29, the Kingdom enjoys a predominantly young demographic<sup>10</sup>. This youthful population is driving significant interest in diverse entertainment offerings, from movies and concerts to entertainment parks and festivals.

## Population interest

Based on a 2024 survey<sup>11</sup> of over 500 Saudi residents, there is a significant interest in theme parks and water parks: 2 out of 3 residents expressed strong interest to visit theme parks or water parks. In fact, at least 1 in 2 residents have already visited a local theme park or water park, confirming the high interest in these attractions (Exhibit 2). Meanwhile around 60% have visited a theme park or a water park outside of KSA. While this data highlights robust market potential and a willingness to visit these destinations, it also hints at a potential gap in the local market that drives residents to seek international destinations.

The survey further reveals that families with children constitute the largest interested segment when it comes to visiting theme and water parks, representing more than 65% of the intended visits to theme parks and water parks. This indicates potentially broad demographic appeal, underscoring the importance of catering to diverse visitor segments to maximize engagement and satisfaction.

## Exhibit 2 - Saudi residents expressed strong interest in visiting theme parks & water parks



10. Median age population, Saudi Census, 2022

11. This survey was designed by BCG and conducted by Native Research, with 541 respondents aged between 18 and 70 years old, living in Saudi Arabia. Respondents were divided into 4 target groups: adults with children (below 9 years old), adults with children (btw 9 & 17 years old), young adults (aged 18 to 24 without kids), and adults (aged 25+ without kids). Insights & takeaways presented below are based on an extensive analysis conducted by BCG on the survey's results.

# Demand patterns in Saudi Arabia

*Note that all the insights below are based on the responses of Saudi residents who expressed a strong interest in visiting theme parks or water parks and completed the full survey.*

Insights into visitor preferences and behaviors reveal valuable demand patterns for theme park and water parks. Interestingly, the survey highlighted significant similarities in preferences across theme parks and water parks as well as among different target groups. To comprehensively understand residents' preferences, the survey explored multiple aspects including visit format, visit drivers, and offering preferences.

## Visit format & drivers

- 1** 90% of the survey respondents would visit a theme or water park at least once a year if it were located within their city, with 67% willing to visit twice or more.
- 2** Around 80% of respondents interested in such destinations would visit during weekends or holidays, with half choosing holidays.
- 3** Sixty percent of interested respondents want to spend between 4 and 8 hours at the park, seeking

comprehensive experiences that include attractions, retail, and dining options, with 78% expressing interest in having at least one meal during their visit.

**4** Meanwhile, on average, 40% of respondents are also interested in staying overnight at adjacent hotels after spending a full day at the park.

**5** Cost, including ticket prices and travel expenses, is the main driver for 43% of visitors when deciding to visit theme parks and water parks. Along with cost, one-third of respondents base their visit decision on the variety of offerings, such as the appeal of rides and shows, and 20% of visitors make their decision based on the park's theme.

## Offering preferences

### OVERALL ENVIRONMENT

When visiting a theme park or water park, most surveyed residents prefer parks that feature both indoor and outdoor areas, while seeking fun and excitement throughout their visit. This indicates the importance of offering a mix of settings and activities, ensuring a balanced, engaging experience that caters to all visitor needs.



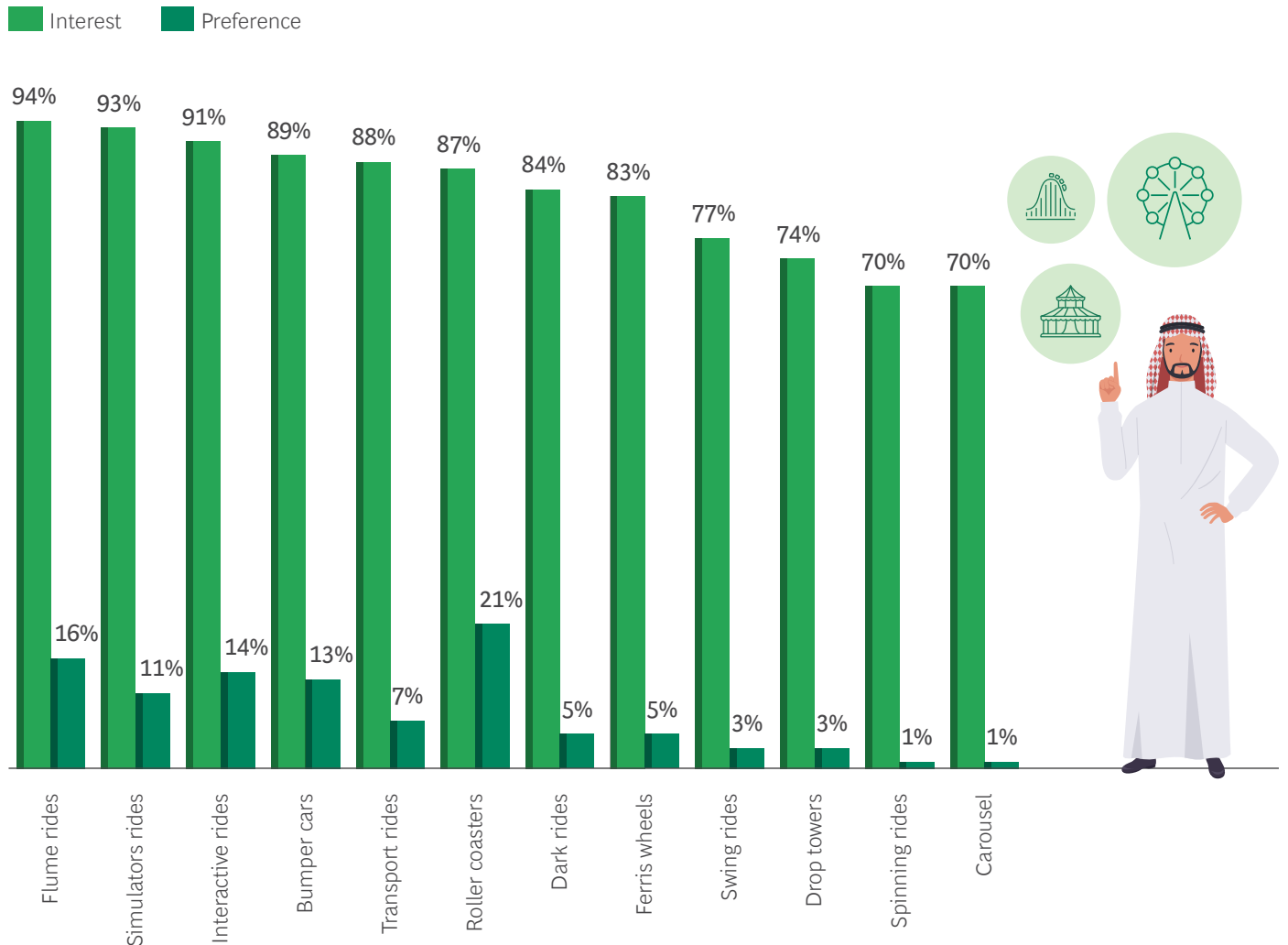
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### ATTRACTIONS AND EXPERIENCES

At least 70% of respondents expressed a strong interest in exploring a diverse range of attractions and experiences while visiting a theme park (Exhibit 3). The survey findings also revealed that 90% of participants are interested in

attractions such as flume rides, simulators, and interactive rides. However, when survey respondents were asked to choose one preferred attraction, roller coasters showed the highest popularity (21% of responses)

## Exhibit 3 - Visitors' interest for specific theme park attractions



**Note:** This graph presents the interest in theme park attractions, evaluated through 'would do vs. wouldn't do' questions for each attraction, and preference measured by asking respondents to choose their favorite attraction from this list in a single-answer format.

The survey reveals similar patterns for water parks, with at least 9 out of 10 showing interest in traditional attractions like typical body slides, mat slides, and speed body slides, along with family friendly attractions such as family tube slides.

This data validates the interest for traditional attractions found in global benchmarks, along with a slight preference for water-based rides even in dry theme parks. Additionally, it highlights the importance of technology in such settings

with 43% of visitors showing stronger interest in parks featuring innovative tech-enabled attractions like virtual reality rides. To cater to these diverse preferences, parks should focus on integrating traditional attractions catering to the different visitor segments, along with unique experiences to stand out in the market. This approach will ensure a captivating and engaging experience for all age groups and family outings adding a layer of differentiation.

**ADDITIONAL OFFERINGS & SERVICES**

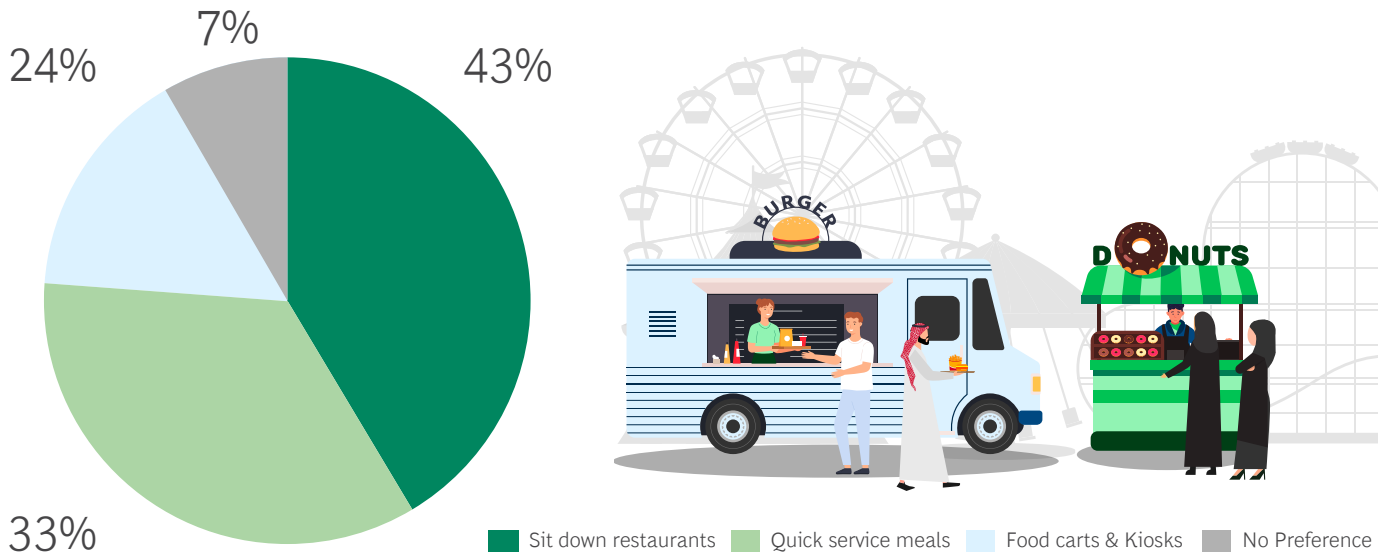
In addition to exciting and diverse attractions, Saudis residents seek a comprehensive experience enabled by a wide range of additional offerings:

- 1 At least 1 out of 3 visitors surveyed would purchase exclusive merchandise and souvenirs during their visit.
- 2 More than 40% of theme park visitors prefer sit-down restaurants for meals. This is primarily driven by

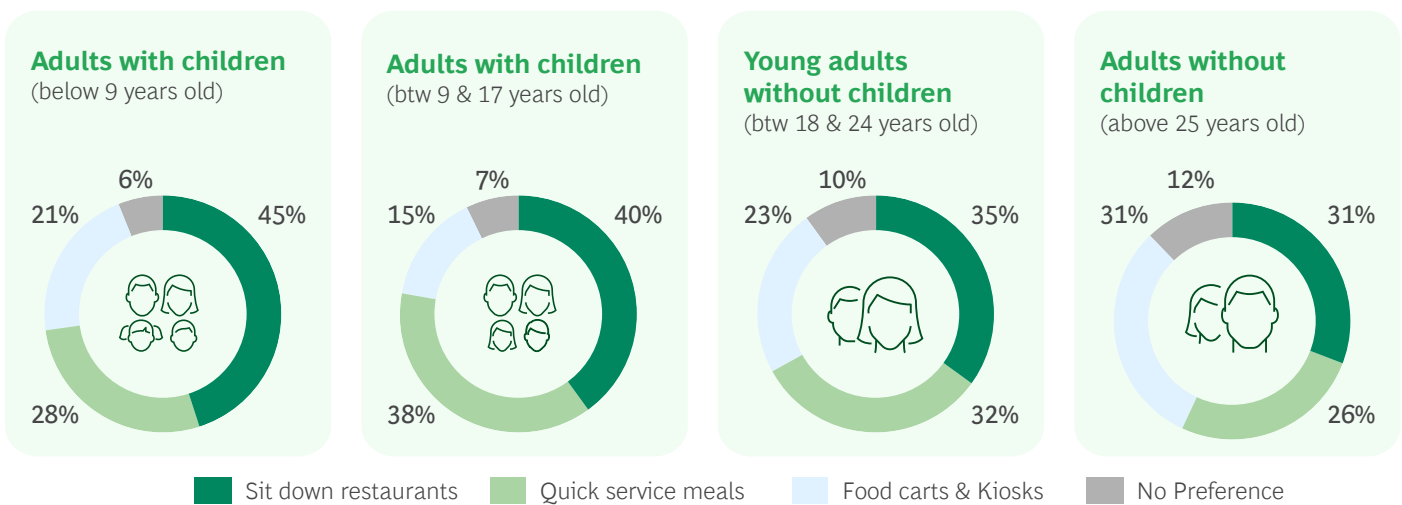
families with children in contrast to adults who would also grab quick meals from food carts and kiosks. (Exhibits 4 and 5).

- 3 Among the 40% of respondents interested in staying overnight, half choose family-oriented accommodations. This indicates that providing a variety of lodging options, including family-oriented hotels will encourage extended stays and ensure access for the different visitor segments.

**Exhibit 4 - Theme park dining option preferences**



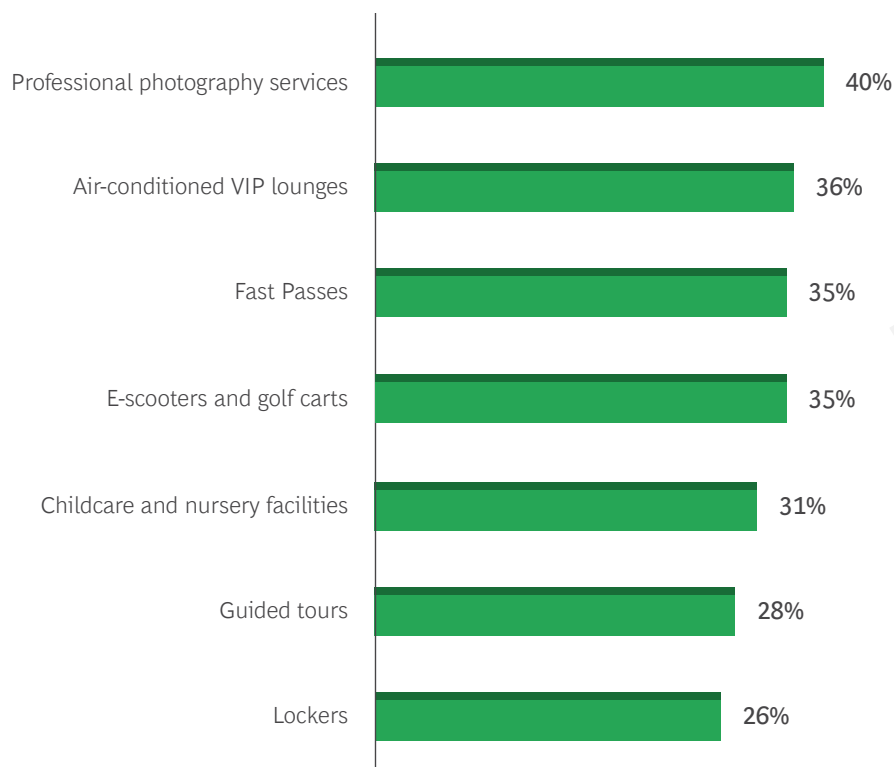
**Exhibit 5 - Theme park dining option preferences by target group**



On top of these comprehensive offerings and despite cost being the main driver for deciding a visit, most visitors are willing to pay extra for premium services to enhance their experience (Exhibit 6). For example, 40% of respondents

are willing to pay extra for professional photography services, and 35% for fast passes to reduce wait times in the park.

## Exhibit 6 - Interest breakdown for premium services with additional cost by target group



This finding indicates how premium services can enhance visitor comfort and satisfaction while providing valuable additional revenue streams. It also validates the importance of using technology to provide the visitors with sophisticated tools like virtual queuing options to navigate their journey in an optimal way. These innovations not only streamline the visitor experience but also contribute to overall operational efficiency, ensuring a seamless and enjoyable journey for all guests.

It is clear that Saudi residents of all ages are entertainment park enthusiasts, visiting both local and international parks for fun and diverse experiences. This demand, complemented by Vision 2030 ambitions and general industry innovation, is set to drive a dramatic evolution in the country's entertainment park ecosystem.

# Saudi Arabia's evolving entertainment park ecosystem

## Global positioning of entertainment parks

From a global perspective, entertainment parks can be analyzed along the dimensions of scale and theming. Three categories are of particular interest:

- 1 Amusement parks** are mid-size parks that primarily attract local visitors from nearby areas. They feature a diverse range of offerings, including rides and attractions, without a specific overarching theme. Examples include Tivoli Gardens in Denmark and Cedar Point in the United States.
- 2 Regional theme parks** are mid- to large-size themed parks that attract visitors from the local region and nearby areas. These parks feature a diverse range of offerings, including themed attractions that create an immersive experience, making them popular destinations for local tourism. Two examples of regional theme parks are Chimelong Paradise in China and Europa park in Germany.
- 3 Global theme parks** are large-size parks that attract both regional and global visitors. They are organized around an overarching theme which helps create an immersive narrative for visitors. Global theme parks usually feature world-class offerings such as unique attractions, experiences, and events often tied to popular movie, TV show, or video game IPs. Examples include Universal Studios in Orlando, Disneyland in Paris, and Ferrari World in Abu Dhabi.

The breakdown of these categories provides a framework for understanding the potential of Saudi Arabia's entertainment sector. Comparing the Kingdom's entertainment ecosystem with global standards presents valuable insights into its potential for growth and development. The following section will delve into the current state and emerging ecosystem of Saudi Arabia's entertainment parks and their alignment with global trends.

## Saudi Arabia's current vs. emerging ecosystem

Over the years, several amusement parks and water parks have been established across the country with standard offerings and no overarching theme, primarily targeting

local visitors. One of the first amusement parks in KSA, was Atallah Happy Land Park<sup>12</sup>, which opened in Jeddah in 1986 and has been a significant entertainment venue for decades, helping to position Jeddah as a local hub for family entertainment.

Analysis of the current Saudi entertainment ecosystem reveals an industry poised for modernization and transformation. Despite strong stated demand, more than five parks have closed over the past couple of years, typically due to limited offering diversity, and sub-par experience. Many existing parks only feature a couple thrill rides and water attractions, lacking the unique experiences, complementary offerings & overarching themes found in global theme parks.

Driven by the launch of Vision 2030, Saudi Arabia's entertainment industry has experienced a surge in investment opportunities, creating a rapidly evolving entertainment landscape. Along this mission, The General Entertainment Authority (GEA) was established in 2017 to enable the development of Saudi Arabia's entertainment ecosystem through overseeing and licensing all investment opportunities related to the entertainment sector. For example, GEA has licensed the recent opening of Jeddah's largest water park, Cyan, in the region, offering numerous aquatic rides and attractions, and leveraging the high local interest in water-based entertainment.

An exciting new ecosystem of entertainment destinations is emerging in Saudi Arabia, positioning the Kingdom as a global entertainment hub for residents and tourists. This transformation, driven by Vision 2030, encompasses several ambitious initiatives, including Riyadh Season, an annual festival featuring global performances, events, and cultural spectacles; King Salman Park, a large-scale urban park designed to integrate arts, culture, and leisure, with several entertainment venues and events; The Rig, an offshore destination offering thrilling and unique experiences; and three major entertainment initiatives: SEVEN, which is developing a range of entertainment complexes across the Kingdom; Qiddiya, a groundbreaking destination for theme parks and adrenaline-pumping attractions; and New Murabba, a futuristic urban district designed to deliver immersive, technology-driven entertainment experiences.

<sup>12</sup>. Atallah Happy Land Park, KSA directory

## SEVEN

SEVEN plans to develop multiple entertainment complexes across Saudi Arabia, each featuring multiple themed zones that provide a wide array of attractions and experiences. These entertainment clusters are designed to offer a mix of activities, including family entertainment centers, adventure zones, cinemas, children's areas, unique attractions, dining & retail spaces. Each destination will present new concepts through partnerships with globally recognized IPs like Discovery, Hasbro and Mattel, ensuring world-class experiences. One example is Al Hamra.

- **Al Hamra entertainment destination**

Encompassing 167,000 square meters and 10 entertainment zones, Al Hamra will include a state-of-the-art multiplex AMC cinema, a large family entertainment center, and an adventure zone featuring thrilling rides and interactive experiences. This destination showcases partnerships including Discovery Adventures & Clip-n-Climb to create immersive experiences and offer a wide range of dining options along with merchandise.

### Qiddiya

Located just 40 minutes' drive from Riyadh, Qiddiya City is set to revolutionize the Saudi entertainment landscape and become a premier entertainment, sports, and cultural destination. Qiddiya will set a new benchmark for entertainment in the Kingdom by introducing more than 10 theme parks, featuring collaborations with world-class IPs and brands. Three of these parks have already been announced, promising to initiate a transformative shift in this industry.

- **Dragon Ball Theme Park**

First of its kind, the Dragon Ball theme park will offer an immersive experience based on the world-famous Japanese media franchise. Covering 500,000 square meters, the park will feature seven themed zones from the Dragon Ball anime, with over 30 rides and interactive attractions. One of the park's five world's first rides will reach a height of 70 meters appealing to both thrill-seekers and Dragon Ball fans.

- **Six Flags**

Six Flags Qiddiya will be the development's flagship theme park, celebrating Saudi culture through six immersive themed lands. Designed in partnership

with the global Six Flags brand, the park aims to offer a world-class experience that pushes the boundaries of thrill and adventure, making it a premier destination for both locals and tourists. Spanning 320,000 square meters, it will feature 28 rides and experiences, including the world's longest, tallest, and fastest roller coaster, Falcon's Flight, along with several food and retail outlets to attract a wide range of visitors.

- **Aquarabia**

Aquarabia will be the largest water theme park in Saudi Arabia, offering a blend of cutting-edge water attractions and Arabian-themed environments. This innovative park aims to provide a unique and culturally rich experience, catering to families, water park enthusiasts, and adventure seekers. Covering 250,000 square meters, Aquarabia's comprehensive visitor experience will feature 22 water attractions, including four record-breaking rides, along with multiple food and beverage options and retail outlets.

### New Murabba

New Murabba will feature numerous world-class entertainment venues, including state-of-the-art stadium, multi-purpose arena, digital art galleries, and many other attractions. At its heart lies the Mukaab, a revolutionary structure promising unparalleled experiences powered by immersive display and advanced holography technologies. Designed to create a futuristic environment, it will elevate immersive storytelling and interactive experiences, setting new standards for entertainment in the region.

This emerging ecosystem lays the foundation for a revolutionary entertainment transformation in the Kingdom by introducing world-class concepts in partnership with global brands. To ensure success, these parks must be tailored to meet the needs and standards of the local population, highlighted in the previous section. For instance, survey findings indicate a high demand for comprehensive experiences, varied dining options, retail opportunities, premium services, and amenities that cater to extended visits.

# Conclusion

Saudi residents' strong interest in theme parks and water parks highlights the significant potential for growth in this sector. Their readiness to travel locally and globally for exciting park experiences confirms this interest and demonstrates willingness to spend on entertainment parks. By updating facilities and introducing world-class offerings, Saudi Arabia's entertainment sector can take advantage of this demand and align with global trends, catering to local visitors and potentially attracting international ones.

The upcoming launch of more than 10 parks in Qiddiya highlights the potential of theme parks & water parks in Saudi Arabia along with the vast opportunities available in the market. In fact, partnerships with renowned IPs and brands like Transformers, Hot Wheels, Six Flags or DragonBall, along with the introduction of world-class attractions, hospitality, retail, and dining options tailored to the needs of the population, will establish new

standards and boost both local and international tourism. However, the entertainment parks industry remains to be explored across the Kingdom, to cater to the broader population and strengthen Saudi Arabia's position as a global player in the industry.

In conclusion, the Kingdom's new projects along with its ambitious and forward-thinking approach will transform it into a leading hub for entertainment and tourism. By focusing on local needs and continuous improvement, the Saudi entertainment park ecosystem is set to drive economic growth, boost local tourism, and solidify the country's desired status as a premier leisure destination. The future of theme parks and water parks in Saudi Arabia is bright, with a clear path toward offering vibrant and engaging experiences for a growing and diverse array of visitors.



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