

# **Saudi Arabia Electronic Games Market Assessment, By Platform Type [Smartphone, Tablets, Laptops, Console Games, Portable Gaming Devices], By Gender [Male, Female], By Players Involved [Single player, Multi-player], By Type [Puzzles, Sport, Racing, Adventure, Education, Simulation and Others], By age [Up to 10 years, 10-20 years, 21-35 years, 35-60 years, 60 years & above] By Distribution Channel [Online; Offline] By Region, Opportunities, and Forecast, 2016-2030F**

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## **Abstracts**

Saudi Arabia is one of the richest nations in the world and has more than a quarter of its population below 15 Years of age. Hence, this demographic contributes to a large consumer base that actively engages in E-gaming and is willing to spend on upcoming advanced technologies and latest editions of electronic games. The Saudi Arabia Electronic Games market is experiencing robust growth and is projected to reach USD 4.51 billion by 2030 from USD 1.20 billion in 2022 . The country's young, diverse and cosmopolitan population, coupled with advancements in technology and access to the internet have helped to create a thriving market for electronic Games.

The market is expected to register a strong CAGR of 20.8% for the forecast period between 2023 and 2030 mainly due to the growing number of gamers. According to the figures released by Saudi Arabia's Ministry of Communications and Information Technology in 2022, there are approximately 23.5 million gamers in Saudi Arabia which is nearly 70 percent of the country's population. Furthermore, the ministry also states

almost 48 percent of gamers are women. Hence, the share of women engaging in electronic games is increasing as the country continues to legalize certain forms of entertainment for women.

For example, GCON Girl Gamers & Developers community – was launched in Riyadh, especially for women and holds regular women-only gaming events to encourage and convert female gamers' passion for Electronic Games into a professional career.

### Rapidly Growing Online Streaming Preference Among Gamers

Saudi Arabia has the third highest gamer population in the MENA region. Online Streaming platforms like Twitch, YouTube Gaming and Facebook Gaming provide platforms for gamers and developers to interact, collaborate and engage with electronic gaming communities across the globe. Watching video games streams of local players and influencers as well as international E-Sports streamers is as popular as playing those electronic games. A survey conducted by YouGov discovered 53% of the people who attended live E-sports events preferred to do so from the comfort of their homes.

Streamers like 'MSdossary7' and 'Lightning BoNabil' are top streamers of the game FIFA and enjoy massive viewership from the audience. Likewise, Saudi Arabia holds many top E-Sports players that have proved their mantle at national and international events, amongst them "Najd Fhad" became the first Saudi women to win e-football title. Their fan base is influenced to invest into the new and upcoming installments of various electronic games, thereby contributing to the market growth.

### Competitive Events Fueling Market Growth

Saudi Arabia is the 19th biggest gaming market in the world, with almost a quarter of its online population playing at least one electronic game on their mobile device for almost 5 days a week. Electronic sports are no longer limited to individual players, technological advancements and high-speed internet have allowed gamers to form teams to play games and tournaments, further enriching their experience.

The Amazon Esports University launched in 2021 enabled electronic game players from all universities in Saudi Arabia to play and compete against each other for the title of the best national team offering more than USD 8500 in grants and rewards. Thus, such events are major attractions for the gaming population between 21 and 35 years of age making for almost 1/3rd of the total gaming population in 2022. Hence, the increasing interest of citizens in gaming is expected to generate demand for electronic games,

thereby supporting market growth in the coming years.

### Government Investments

The Saudi Arabia government recognizes the potential of the electronic sports industry and thus has invested actively in electronic gaming companies actively over the years. In September of 2022, Saudi Arabia's Crown Prince HRH Prince Mohammed bin Salman announced the National Gaming and Esports Strategy (NGES), which is a comprehensive 10-year investment plan to develop the entire gaming and Esports value chain successively, Mohammed bin Salman Foundation, or Misk, announced a strategic investment of around SR813 million (217 million USD ) to acquire a 33.3 percent stake in Japanese gaming Company SNK Corporation, and 3 billion USD investment in shares of game companies such as Electronic Arts, Activision Blizzard, and Take-Two Interactive Software. Seeing the increasing consumer base in Saudi Arabia, US-based Activision Blizzard also partnered with Saudi Telecom Company in 2022 to host the regional servers for one of their most popular titles, Call of Duty. This comes after the country's Minister of Communications and Information Technology Abdullah Alswaha announced an investment of USD 6.8 billion in future technologies including e-sports and gaming. Ministry also launched Game Changers Program in collaboration with the game design academy DigiPen to provide unique career pathways for entrepreneurs in the Saudi gaming industry and increase the number of independent game company startups.

Driven by government investments and market demand, the Saudi Electronic Sports organizer, Gamers8 also announced its 2023 event with a total prize pool of 45 million USD . Such events set the benchmark and attract other organizers as well as customers.

### Adventure Electronic Games Likely to Grow Fast

Adventure-type games encompass a variety of single as well as multiplayer games that offer role-playing games, and a virtual world-like environment to interact and navigate. The segment contributes almost one-third to the total market and displays the fastest growth amongst other segments like Puzzles, Sports and Racing. In April 2022, Tamatem Jordan-based adventure type mobile game developer and publisher ranked as the No. 1 game publisher in the MENA region in user engagement with one million active users across its games, three million users playing monthly, and 150 million downloads. Tamatem has published more than 50 games on both iOS and Android with a focus on publishing MMO-RPG, strategy, builder, mid-core, SLG, puzzle and trivia

games.

Multiplayer first person shooter games like PUBG MOBILE rank first in terms of app downloads in android and adventure and fantasy games like Roblox takes the spot for the most downloaded app on iOS. For professional E-sports players games like Rainbow Six Siege and Call of Duty are the highest monetary prize awarding games and the most prize money won overall respectively.

### Laptops Segment Continues to Gain Momentum

Emerging electronic games require more computation power from devices like better RAM and Graphics interface, and faster internet connectivity. Mobile devices cannot support larger and graphically intensive games that consoles offer, Laptops however act as intermediaries and can support various large sized virtual games. Hence, due to these gamers in Saudi Arabia are increasingly inclining towards laptops as their first preference for a smooth gaming experience. Moreover, the high disposable income of gamers based in Saudi Arabia allows them to afford a high-end gaming experience. Thus, owing to this various laptop manufacturers are launching products to cater the gaming needs. For instance, Laptop manufacturer ASUS and Lenovo are bringing out Laptops that focuses entirely on gaming and enriching the gamers' experience. Lenovo launched Legion Pro 7i with the latest 13th Gen Core i9 CPU equipped with the Nvidia GeForce RTX 4000 series graphics card, to give users an amazing gaming experience.

### Impact of COVID-19

Despite the global supply chain disruption, the pandemic saw an increasingly positive trend for E-sports with the number of hours watched tripled . With the general population under lockdown and restricted entertainment sources, many turned to electronic games for relieving stress and entertainment. Gamers Without Borders, an esports fundraiser organized by Saudi Arabia in May 2020 become the biggest esports charity event, with 120,000 players from over 70 countries competing for a charity prize pool of USD 10 million, and a viewership of five million who have tuned in to watch players and teams battle out for their chance to send part of the prize money to their chosen coronavirus charity.

Saudi Arabian Sports for All Federation (SFA) and the Saudi Arabian Federation for Electronic & Intellectual Sports joined forces during the COVID-19 crisis to launch the Move to the Game initiative to help people maintain physical fitness and mental well-being during lockdown and attracted tens of thousands of participants.

## Impact of Russia-Ukraine War

There was great condemnation in the E-sports community for the ongoing Ukraine and Russia war, many E-sports events were organized to gather support for victims of war on both sides of the border. Massive disruptions of the supply chain specifically for electronic sports were not seen, except for the countries neighboring the war-torn nations. The war did result in delay of certain new installments of new and upcoming games. As E-sports utilizes online servers to host players, events and save their game progress, many games shut down their servers for both countries involved in war. This resulted in gamers being restricted to local servers or using VPN to access other servers worldwide. Saudi Arabia also enjoyed fair share of influx of international gamers on their local servers.

## Key Players Landscape and Outlook

Electronic Sports Market in Saudi Arabia is rapidly growing driven by the young demographic of the country, growing economy, access to internet and availability of technology. Many Electronic sports companies consider Saudi Arabia emerging market for expansion and trying out new products and services. The Kingdom of Saudi Arabia has recognized the potential electronic sports have to offer and have launched the National Gaming and Esports Strategy in September 2022, with aim of making Saudi Arabia the global hub for this sector by 2030 through his Vision 2030 objectives. Saudi Arabia holds many national and international E-sports with millions of USD in cash prizes that inspire the young audience. Companies operating in the electronic games market of Saudi Arabia are actively engaged with the government to promote gaming and thus government has been regularly funding the gaming studios. For instance, in 2023, the government's Investment Fund has increased its shares in Electronic Arts by 55%, going from owning 16.01 million shares to now 24.81 million shares, according to a financial filing observed by Seeking Alpha.

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