ANALYSIS

OCT 2026

Saudi Arabia has the players. Does it have the industry?

The demand is strong. Turning it into Saudi studios and jobs is the harder part.

@Abdulaziz Binkhamis

Swipe →

Is the demand real?

25.8M+	**gamers;** Saudi Arabia is about 20% of MENA games revenue
47%	**of 10–19-year-olds use a PlayStation;** 38% game on smart devices
2 in 3	**adult players spend monthly;** 22% spend over SAR 150 a month
$1.19B	**spent in 2024,** forecast $1.64B by 2028
Abroad	**The games Saudis rate best** (EA Sports FC, Call of Duty, PUBG) are all made abroad

Savvy Games 2024 (via Arab News); CST Saudi Internet 2025; SCOP 2025

What does Saudi Arabia want to build?

The National Gaming and Esports Strategy (2022) sets these targets for 2030:

250	gaming companies
39,000+	jobs
30+	globally competitive Saudi games, in the global top 300
SAR 50B	GDP contribution, about $13.3B

PIF; Saudipedia; Asharq Al-Awsat; SPA

What has it done so far?

It bought into the global industry. $38B committed in 2022 through PIF's Savvy Games Group; over $29.5B deployed.

$55B — **EA, 2026, with partners:** maker of EA Sports FC, Saudis' favorite game

$8.4B — **Scopely and Niantic, 2023–2025:** makers of Monopoly Go! and Pokémon GO

$12B — **in stakes** in Nexon, Square Enix, Koei Tecmo and NCSoft

Saudi Arabia now co-owns the maker of its favorite game. **The game is still made abroad.**

Naavik; EA; Variety; Game World Observer; AGBI

How far is it from its own targets?

The 2030 targets set by the national strategy, against what is visible today.

2030 TARGET	TODAY
250	**Companies.** Today: 40+ studios (unofficial directory)
39,000+	**Jobs.** Today: hundreds visible; no official total published
30+	**Globally competitive games.** Today: none found yet
SAR 50B	**GDP contribution.** Today: no published figure

IsaKaba; Wamda; SPA

Why is the gap there?

Skills	**Few specialized** game-development training programs
Hits	**No global hit yet.** First titles are shipping: Steer Studios' Grunt Rush reached 1.5M downloads in 3 weeks.
State	**Mostly state-led.** Savvy, NEOM, Qiddiya and the Ministry drive most activity; private studios are still few.
Dubai	**Competition for talent.** Dubai targets 30,000 gaming jobs by 2033 and has 350+ gaming companies.

Roland Berger (2025); The National; TahawulTech

How did others close the gap?

Different starting points, the same ingredients, and a decade or more each.

Korea

Started with a huge home audience (fast internet, PC gaming cafés). Today: 87,000+ jobs and $8.5B in game exports a year.

Finland

Started with talent left over from Nokia, plus small, long-term government startup funding (about €70M over 15 years). The industry grew from €40M to €1.8B in ten years.

Poland

One global hit, The Witcher, put Polish studios on the map; 824 studios today. When government support ended all at once in 2023, about 120 studios closed.

Studios are built at home; **their games sell worldwide from day one.**

KOCCA; Science Business; PARP

Which ingredients does Saudi Arabia already have?

Arriving	**Experienced people:** a skills gap, but co-development studios are coming in (e.g. Side's Riyadh studio with Savvy)
16% of target	**Many studios, not one champion:** about 40 of 250
In place	**Long-term funding:** $38B plus state programs (NEOM Level Up, Saudi Game Champions)
Not yet	**A first global hit**

The money is there. The rest can't be bought quickly.

Game Developer; IsaKaba; Naavik

Demand and capital are in place.

Studios, skills and a first global hit are the work of the next decade.