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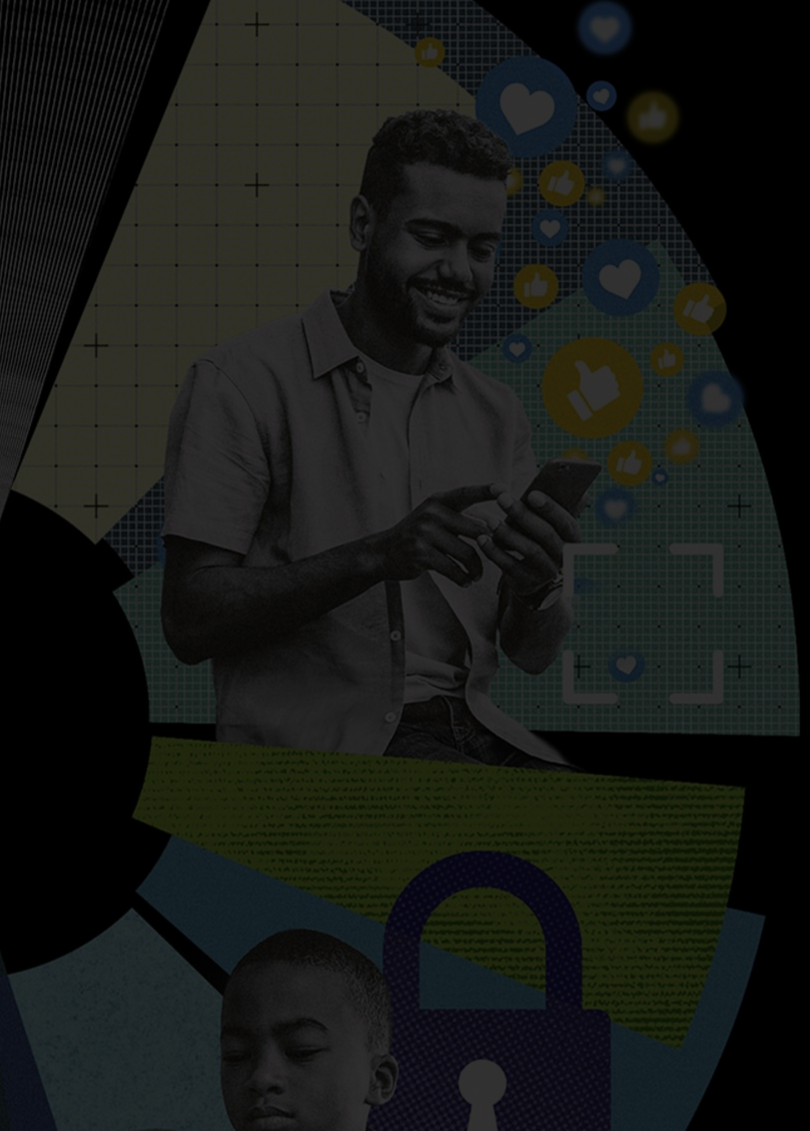
Digital Consumer Trends 2026

KSA Edition

March 2026

مئة عام
Years in the Middle East



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Digital Consumer Trends 2026, KSA Edition

About Deloitte's

Digital Consumer Trends 2026

- Digital Consumer Trends 2026 (KSA Edition) is conducted by Deloitte's ME Technology, Media and Telecommunications (TMT) industry team.
- Digital Consumer Trends is a multi-country study of how people engage with and purchase digital products. It spans devices, connectivity, media, and emerging technologies.
- The KSA edition of this research comprises a representative sample of 1,000 consumers across KSA, aged 18-50, and weighted for demographics such as age, gender, generation, region and working status.
- The survey took place in September 2025 and was conducted by an independent research entity. Questions cited in this document may be simplified for the sake of visualization.

Gen Z

Age range 18–29

Millennials

Age range 30–45

Gen X

Age range 46–50

Key takeaways

Gen AI usage continues to grow

Gen AI usage levels

+5% compared to last year

66%

Gen AI purpose of use

Personal	Education
72%	62%

Generational engagement with Gen AI

Gen Z (*72%*) Millennials (*64%*) Gen X (*55%*)

5G network quality

39% users always experience full 5G coverage and speed – this is much higher than 19% in the UK

Paid digital video subscription is led by Gen Zs

66% Gen Z

56% Millennials

51% Gen X

Top 3 devices with high daily usage

98% Smartphones

68% Smart TVs

63% Wireless headphones

68% favor **social media ban** for 16 years and below

42% believe **online misinformation** has become more prevalent

Generative AI

Digital Consumer Trends 2026, KSA Edition

Evolving Patterns of Generative AI landscape in Saudi Arabia

66%
Respondents in KSA use Gen AI in their day-to-day life

84%
Gen Z are aware of Gen AI – highest amongst various age groups

45%
Amongst the Gen AI users, use it for work related purposes

23%
Mention that company doesn't have a clear policy on Gen AI usage

63%
Millennials are concerned that Gen AI will reduce jobs in future

54%
Were less inclined conversing with Gen AI assistant at customer service

41%
Users engage at least daily or on weekly basis with Gen AI tools

60%
Consider "free to use" external Gen AI tools at work

Generative AI adoption in KSA accelerated last year, slightly overtaking the UK's Gen AI usage among the respondents

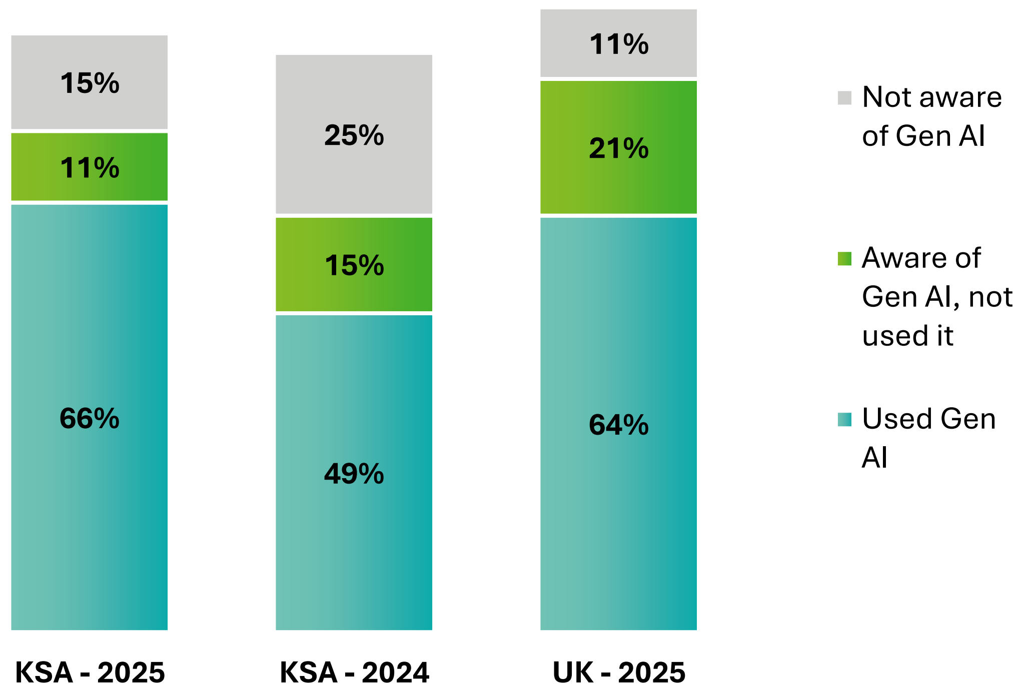
Generative AI adoption in KSA has accelerated, with 66% of consumers currently using Gen AI (17-percentage-point increase from 49% last year). This sharp rise signals a rapid shift from early curiosity to mainstream usage, as consumers increasingly integrate AI tools such as ChatGPT and Google Gemini into everyday life.

The share of respondents aware but not using Gen AI and those not aware of Gen AI too have seen a decline this year.

This growth is strongly aligned with Saudi Vision 2030's goal of harnessing cutting-edge technologies such as AI to build a knowledge-based economy and establish KSA as a leading global hub of innovation.

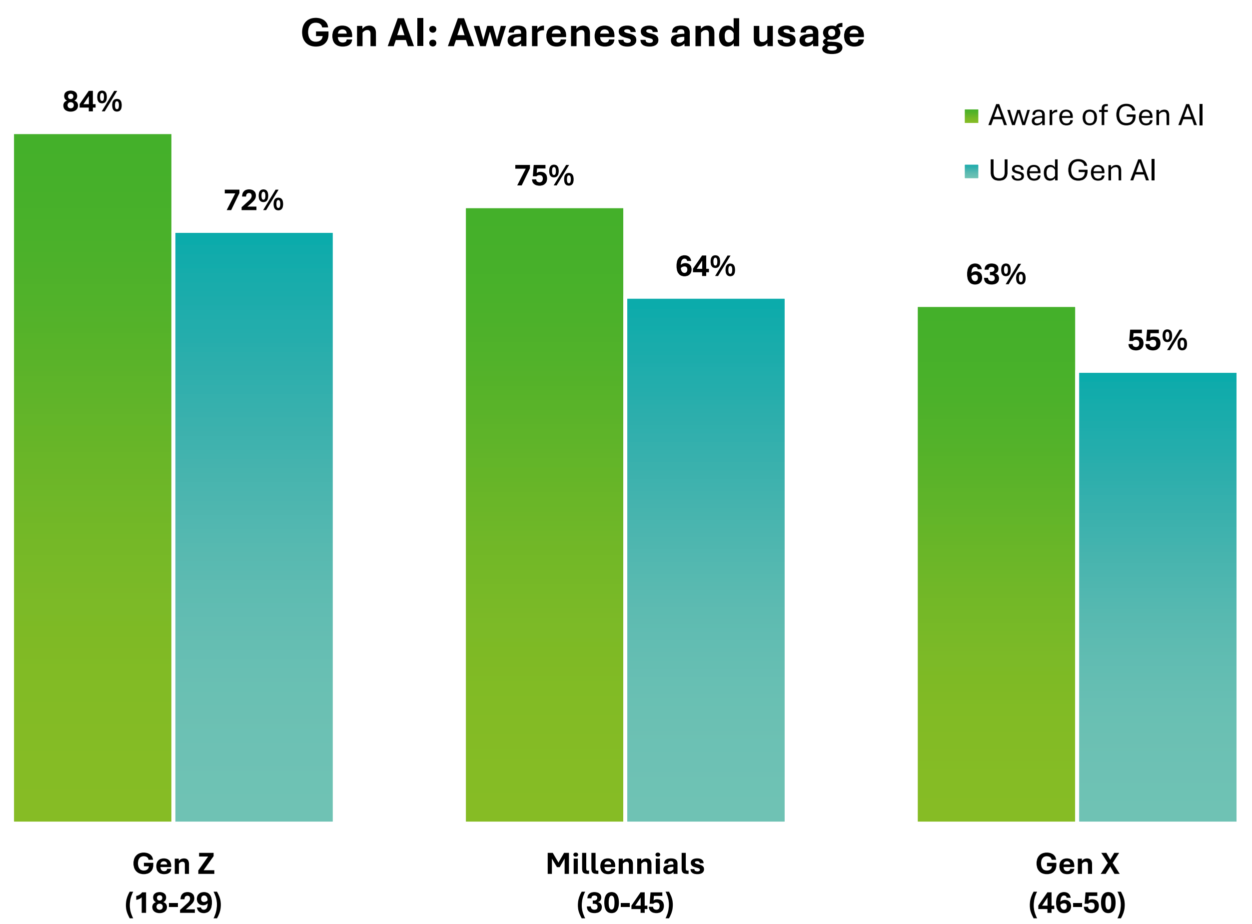
Gen AI usage in KSA is slightly higher than the UK for the comparable sample. In the UK, 64% of consumers claimed to have used Gen AI, while 11% are not aware of any Gen AI tool.

Gen AI: Awareness and usage



Question: Which generative AI tools have you heard of?; Which generative AI tools have you used?; [Choice from a range of tools, plus "Another"]
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)); Respondents aware of generative AI, who did not know if they had used it were sorted into "Aware of Gen AI, not used it".
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

Gen AI awareness and usage is unsurprisingly the highest among Gen Z



Generational engagement with Gen AI is unsurprisingly higher amongst younger age groups

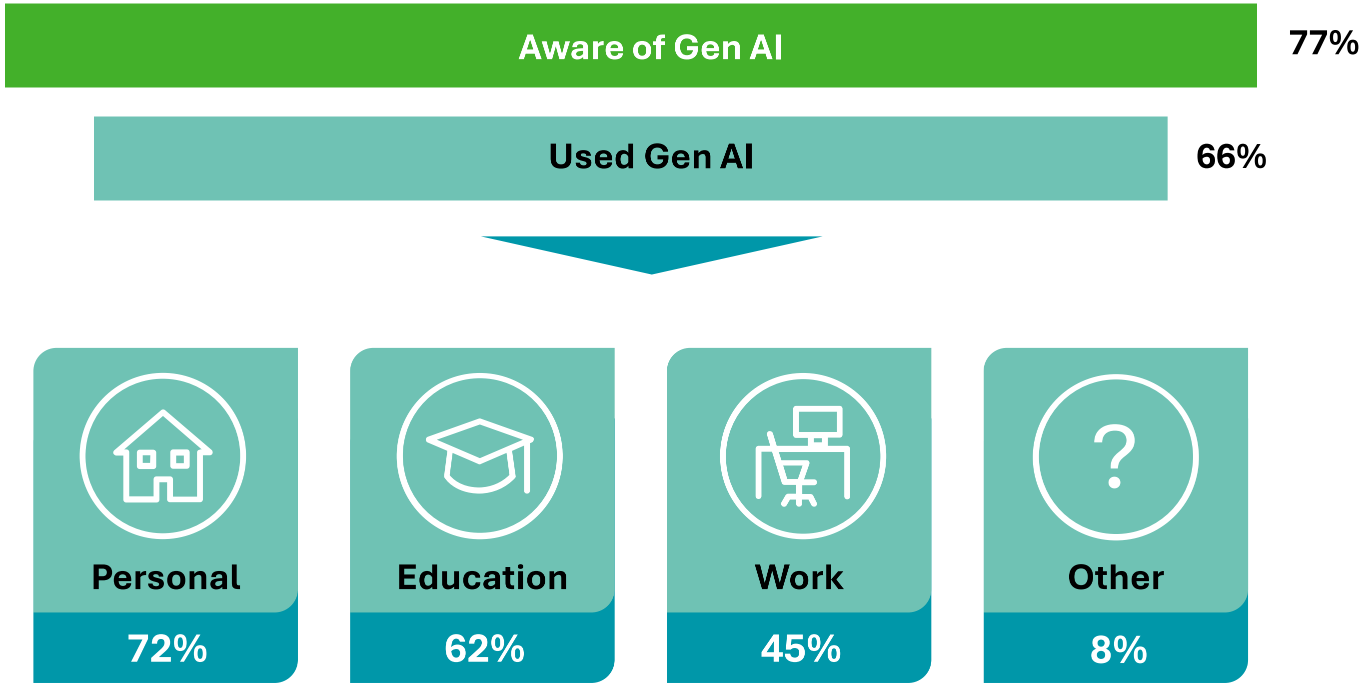
Gen Z (18–29 years) currently lead in both awareness (84%) and usage (72%) of Gen AI tools. Millennials (30-45 years) shows moderate adoption, with 75% awareness and 64% usage.

On the other hand, interestingly almost half (45%) of the Gen X (46–50 years), admit not to be users of Gen AI

Question: Which generative AI tools have you heard of?; Which generative AI tools have you used?; [Choice from a range of tools, plus "Another"]
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025

Gen AI is no longer an emerging trend – it forms part of our daily lives, with highest usage being for personal purposes

Gen AI: Purpose of use



Personal use is the primary driver of Gen AI adoption in KSA with 72% users, as compared to 55% using Gen AI for personal tasks till last year. **This indicates a growing tendency to integrate Gen AI into day-to-day life.**

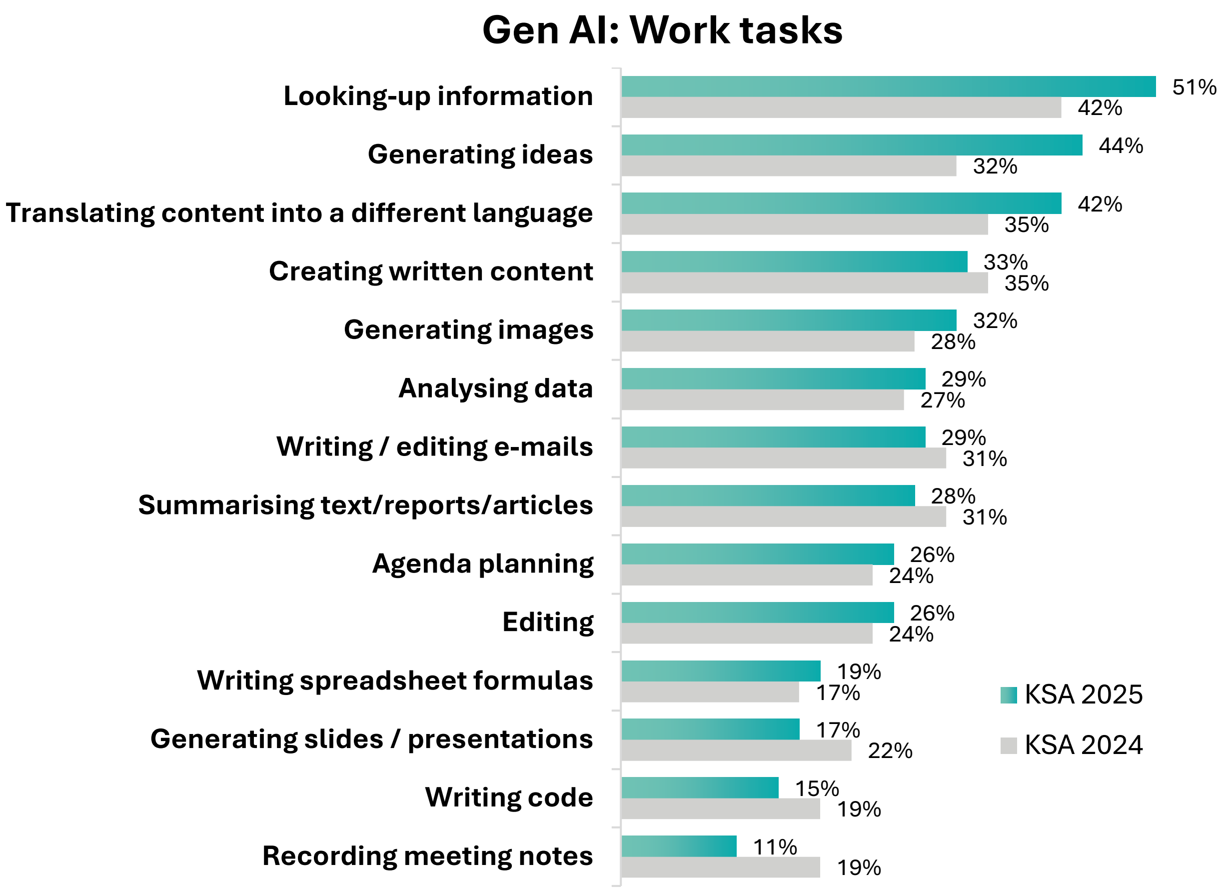
Education-related usage has strengthened year-on-year, increasing from 59% last year to 62% in this year, reflecting **rising use of Gen AI for learning, skill development, and academic purposes.**

While we see an uptick in Gen AI usage at work (currently at 45% as compared to 38% last year), the **adoption at work is still at an emerging state** as most users rely on free tools, and employer support remains limited.

In the UK personal use leads at 76%, followed by work at 54% and education at 42%.

Question: Which generative AI tools have you heard of? Which generative AI tools have you used? [Choice from a range of tools, plus "Another"]; Which of the following purposes have you used any generative AI for?
Weighted base: All respondents aged 18-50 years, KSA 2025(1,000); who have used generative AI, KSA 2025 (664), KSA 2024 (488), UK 2025 (1,457)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

In KSA, Gen AI wins at research – Content creation hits its limits



In the UK, searching (51%) and email writing/editing (44%) are the most common applications of Gen AI at work.

Question: Which of the following work tasks have you used any generative AI tools for?
Weighted base: All respondents aged 18-50 years who have used generative AI for work, KSA 2025 (296), KSA 2024 (185), UK 2025 (793)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME (2024); UK (2025)

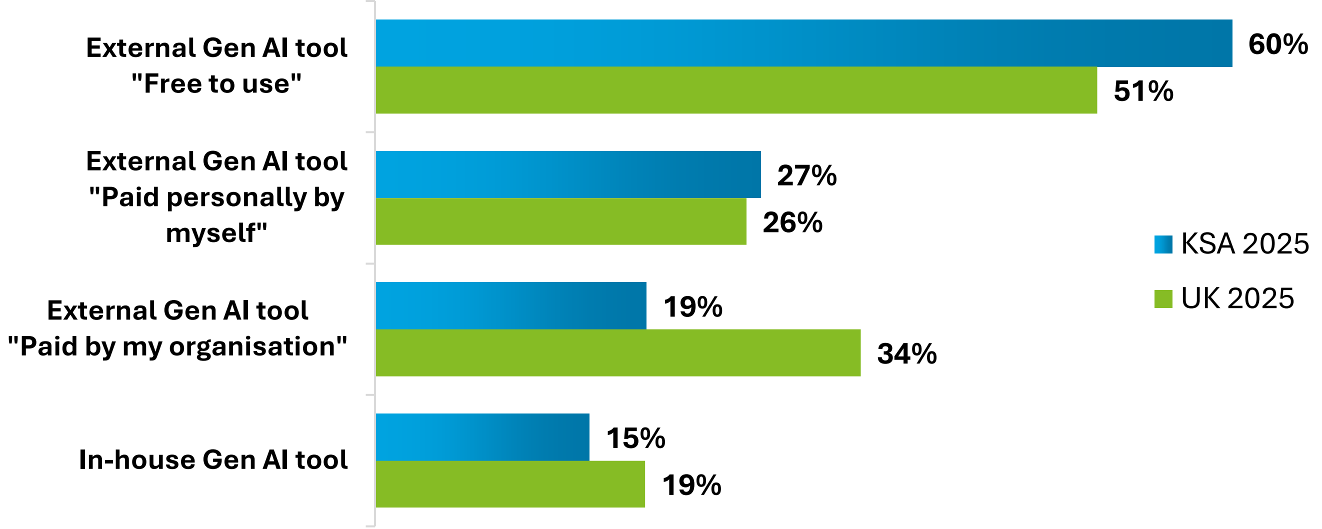
Gen AI usage in the workplace in KSA is becoming more embedded in everyday workflows, wherein searching for information has emerged as the most common use case at 51% (up from 42% in last year), followed by generating ideas (44%) and language translation (42%) – indicating that Gen AI is becoming a default first step for looking information, knowledge retrieval, and idea generation at work. However, the usage of Gen AI in areas related to content creation (like creating written content, generating images, writing emails, summarizing reports, generating slides, or writing codes) witnesses a decrease or stabilization.

This emerging trend is clearly polarizing enterprise Gen AI adoption. AI is increasingly trusted as research and insight accelerator, while its role in end-to-end content creation is being approached with greater caution – reflecting hard-learned lessons on accuracy, context, and accountability. As a result, organizations are defaulting to a 'research-first' mindset, using Gen AI to inform human judgement rather than replace it. **The strategic questions are** – *will this trend get inverted in future? As LLMs mature in capability, reliability, and precision – will enterprises re-embrace AI-led creation, or will human oversight remain the irreducible control point?*

Gen AI tools with free access remain the primary choice at work in KSA, with limited employer-funded adoption

45% people in the KSA have used Gen AI for work purpose

Gen AI at work: Who pays?



Question: Which of the following describe the generative AI tools you have used for work?
Weighted base: All respondents aged 18-50 years who have used a generative AI tool for work, KSA 2025 (296); UK 2025 (793)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Gen AI in the workplace in KSA is still largely accessed (60%) through free-to-use external tool, whereas external Gen AI tool usage paid by the organization (19%) or in-house Gen AI tool usage (15%) remain very low.

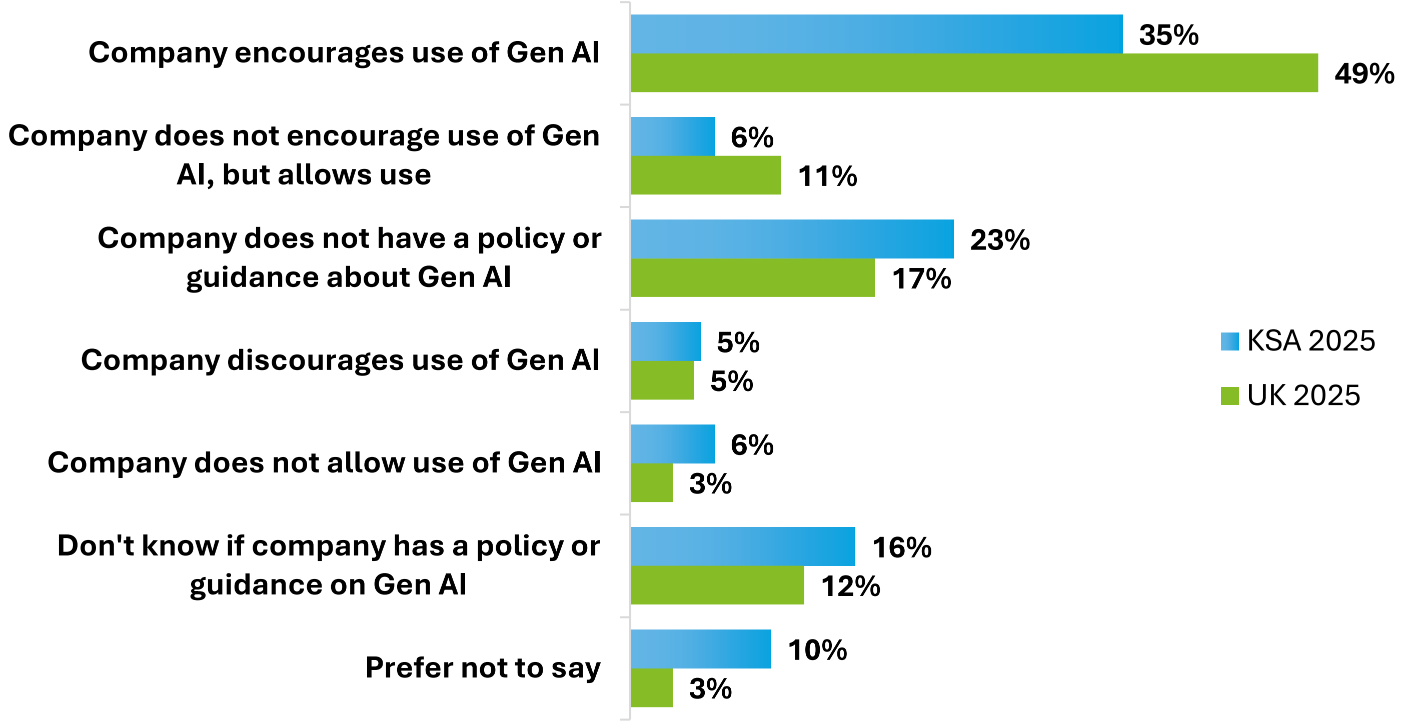
In more mature markets such as the UK, Gen AI adoption is increasingly moving beyond individual experimentation, with organizations actively funding and integrating external Gen AI tools at work. By contrast, AI adoption in KSA remains largely employee-driven rather than institutionally embedded – suggesting a near-term inflection point where the market would probably follow a similar trajectory towards formal investment, governance, and enterprise-scale deployment.

Providing certified tools, clear policies, and workforce training will not only drive business outcomes but also foster a culture of responsible innovation, aligning with national digital transformation priorities as part of the KSA's Vision 2030 plan.

While UK enterprises encourages 49% to use Gen AI, in KSA only 35% feel encouraged – largely due to unclear policies at work

Gen AI at work: Encouraged or discouraged?

Of the 45% of respondents in KSA and 54% of UK respondents between 18-50 who have knowingly used Gen AI for work…



Proactive encouragement of Generative AI usage at work is still at an early stage in KSA market, with around little over one-third of employees being encouraged by their company for Gen AI use, as compared to nearly 50% in the UK market.

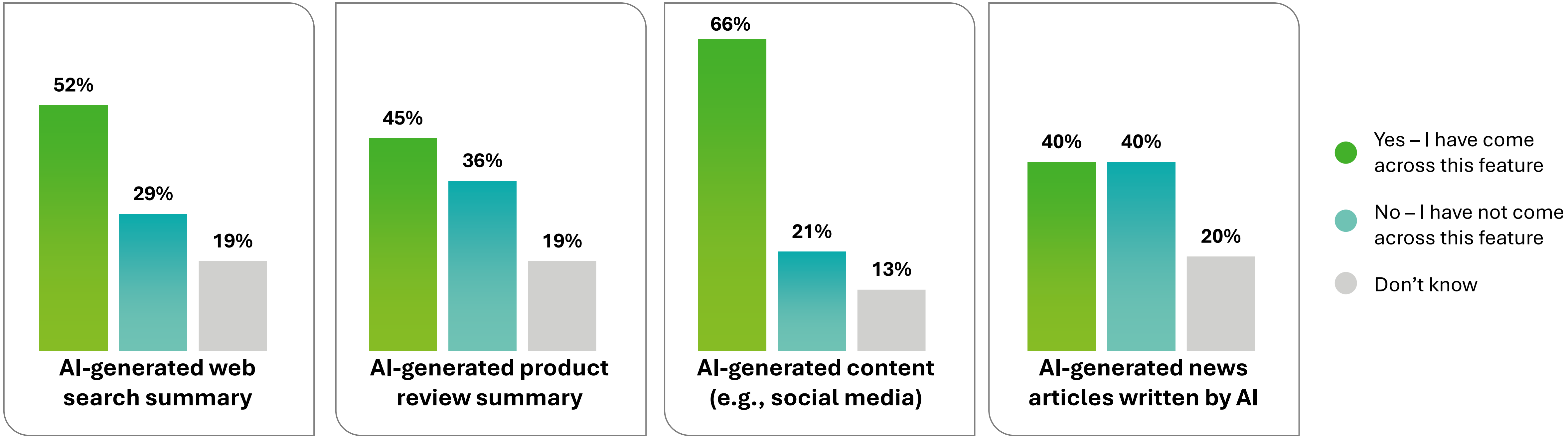
A significant number of respondents, close to one-fourth, report that there is no policy or guidance about Gen AI usage in their companies, and 16% are unsure about the Gen AI usage policy. **This signals a need for clearer governance frameworks** and an opportunity for companies to drive AI framework to maximize productivity and safeguard risks from employees using unauthorized platforms.

Question: Which of the following statements applies to your company about the use of generative AI tools for work purposes?
Weighted base: : All respondents aged 18-50 years who have used a generative AI tool for work, KSA 2025 (296); UK 2025 (793)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Gen AI is shaping online experiences in KSA through passive exposure across platforms

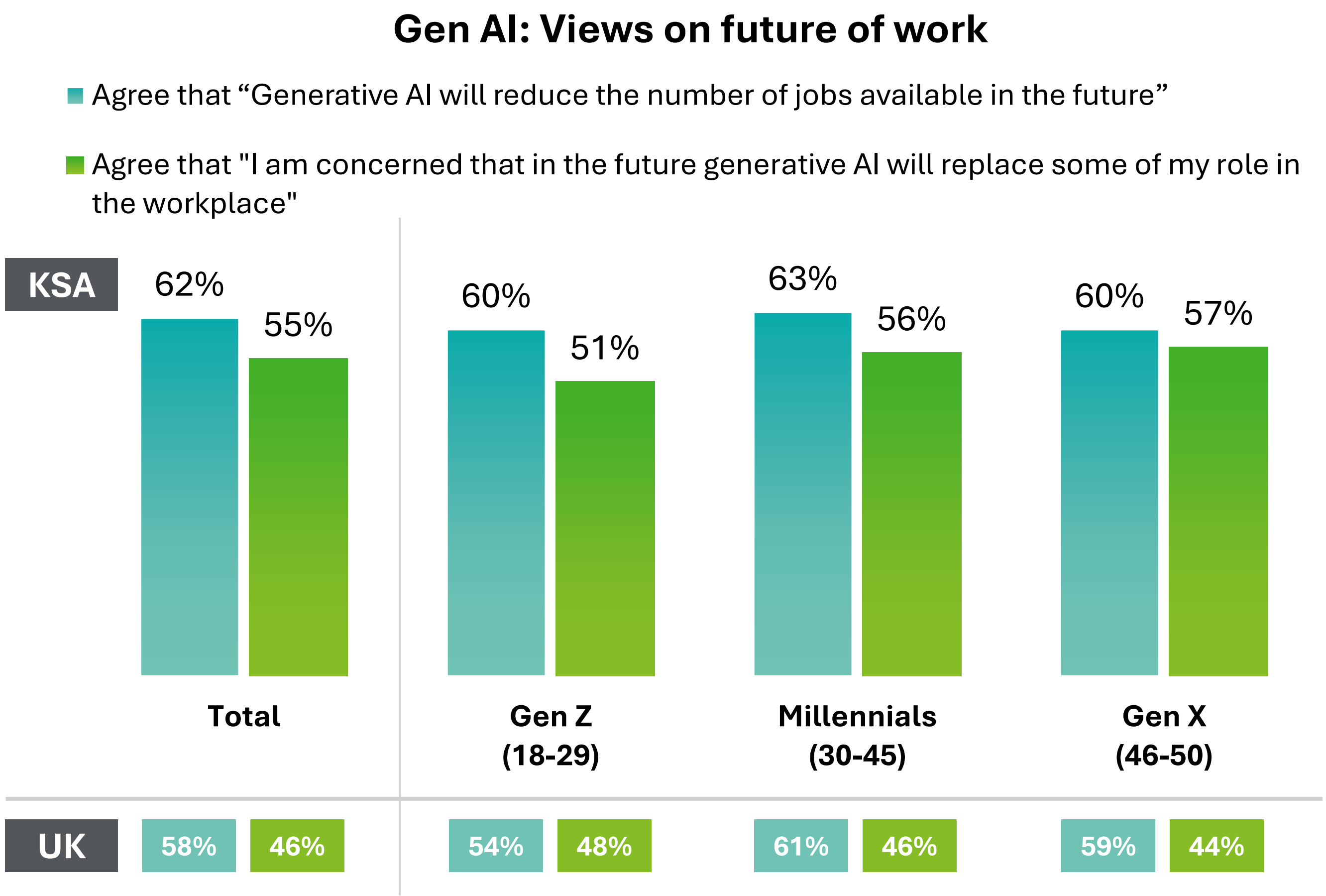
Generative AI is becoming a foundational element of the digital experience in KSA, shaping interactions across search, commerce, social platforms, and news. Over half of users (52%) report encountering AI-generated web search summaries, suggesting that AI is now influencing how information is accessed and prioritized at the first point of inquiry. Exposure is particularly prominent in social environments, with 66% noting AI-generated content on social media, indicating that AI-driven content-generation systems are now embedded in everyday digital engagement.

"Passive" Gen AI: Features noticed while browsing online



Question: In the last 12 months, have you come across any of these AI features while using your devices or browsing online?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025

Caught in the middle: in mid careers roles, Millennials feel the most threatened by Gen AI's impact on job security



Question: To what extent do you agree or disagree with the following statements?
Weighted base: All respondents aged 18-50 years, KSA 2025, who are aware of any generative AI tool (772), working and aware of any generative AI tool (467)
Source: Deloitte Digital Consumer Trends, KSA 2025

In KSA, concerns about generative AI's impact on jobs are more pronounced than in the UK. Overall, 62% of respondents in KSA believe AI will reduce job availability, compared to 58% in the UK. Similarly, 55% in KSA are worried about AI replacing aspects of their roles, higher than the UK's 46%. The gap could be because, AI threatens roles before large-scale reskilling systems are fully established, whereas the mature markets, like UK has already undergone a lot of digitization and encourages higher usage of Gen AI tools at work.

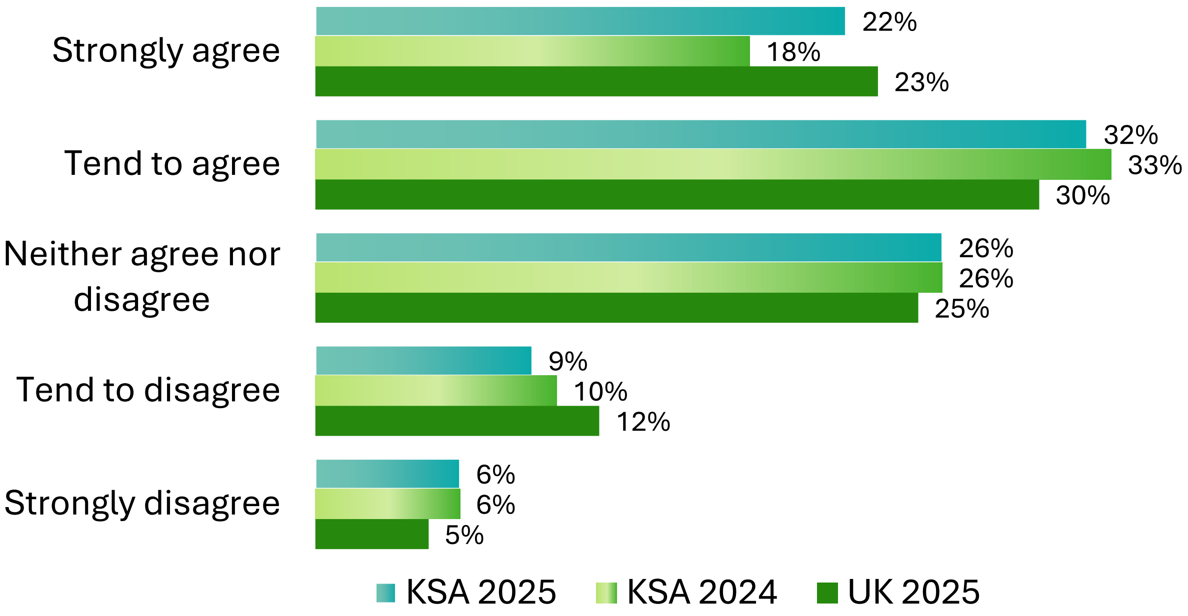
Across generations, Millennials in KSA express the highest concern, with 63% fearing job reductions reflecting heightened generational anxiety, whereas in Gen Z only 51% believe that AI will replace their role in workplace. Clearly, the Millennials being mostly at mid-career roles feels high-stakes, whereas Gen Z is still early career which offers more flexibility, Gen X often are at seniority with established management roles which AI cannot fully replace yet.

The positive side is, significant proportion of respondents are far less concerned – which probably suggests they are ready to leverage AI to boost productivity and are invested in reskilling at work.

Consumer caution towards AI led customer service remains evident, with more than half of the users expressing reluctance

Gen AI: Customer services

"I would be less inclined to use customer services if I knew I was conversing with a generative AI assistant"



The trend seems to be similar (and even more pronounced) to last year and in the UK, wherein more than 50% of the users agree that they would be less inclined to use customer services if they were conversing with a Gen AI agent. **This highlights the continued need for organizations to build greater trust and human touch around AI-driven services.**

Across generations, Gen X is more skeptical about conversing with Gen AI assistant, with 63% agreeing that they would be less inclined to use customer services if they knew that they were conversing with gen AI assistant (as compared to 49% of Gen Zs and 56% of Millennials).

Recently few of the Saudi based businesses are embedding hybrid AI-human support models in customer service* strategies, to ensure balance of automation and human trust – which could be a good approach to win customer trust.

Question: To what extent do you agree or disagree with the following statements?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

***Source:**
- https://newsroom.ibm.com/2025-12-08-riyadh-air-and-ibm-partner-to-launch-worlds-first-ai-native-airline
- https://www.arabnews.com/node/2606822/saudi-arabia

Devices

Digital Consumer Trends 2026, KSA Edition

Evolving Patterns of Devices landscape in Saudi Arabia

90%
Own a smartphone, i.e., 6-percentage-points increase from last year

55%
Use their smart watch on daily basis

42%
Are willing to buy a new smartphone in next one year

56%
Own Smart TV – highest in smart entertainment devices category

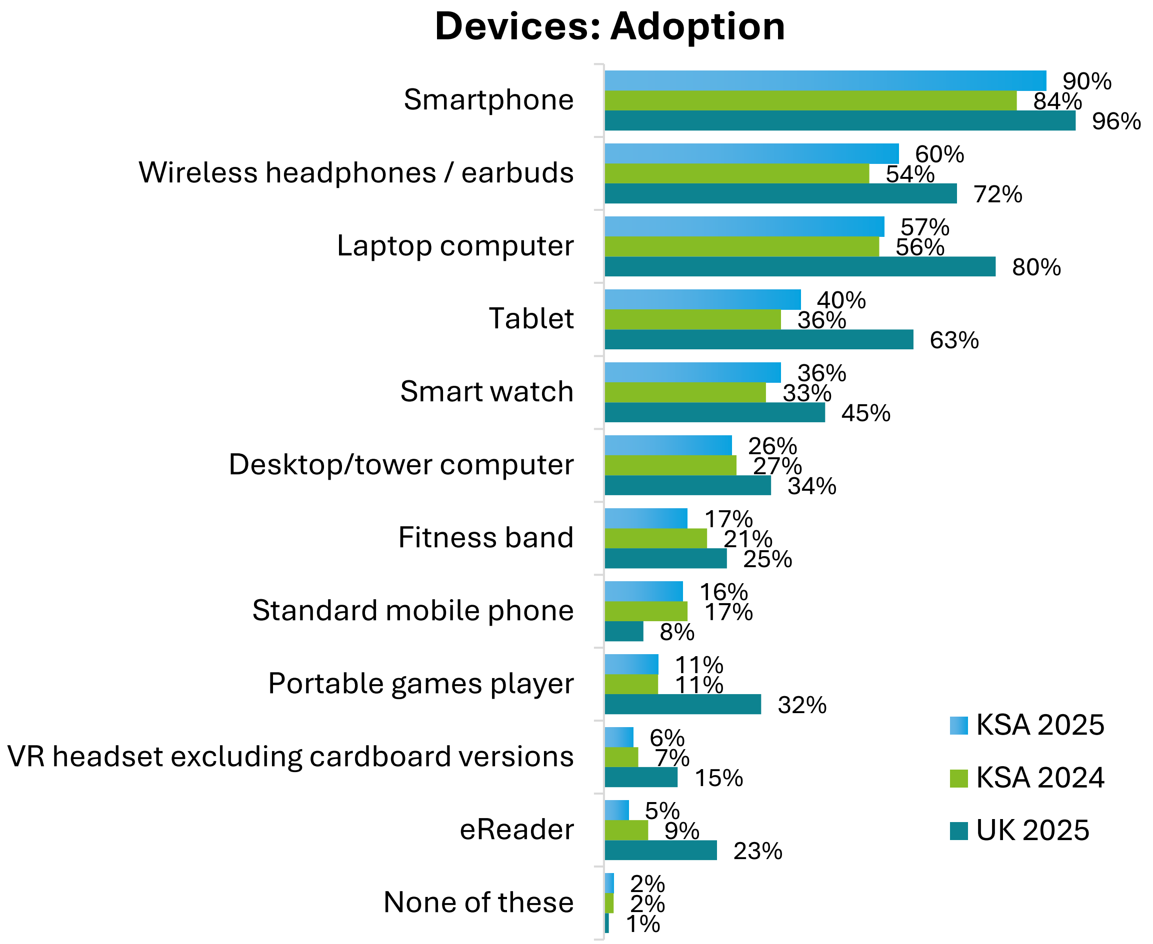
16%
Have ready access to smart home security camera or video doorbell

90%
Gen Zs plan to purchase a connected device in next one year

65%
Gen X hold on to a phone purchased in 2023 or before

24%
Plan to purchase a laptop and smart watch in next 12 months

Some growth of device adoption in KSA, although there are clear signs of plateauing in certain categories



Question: Which, if any, of the following devices do you own or have ready access to?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

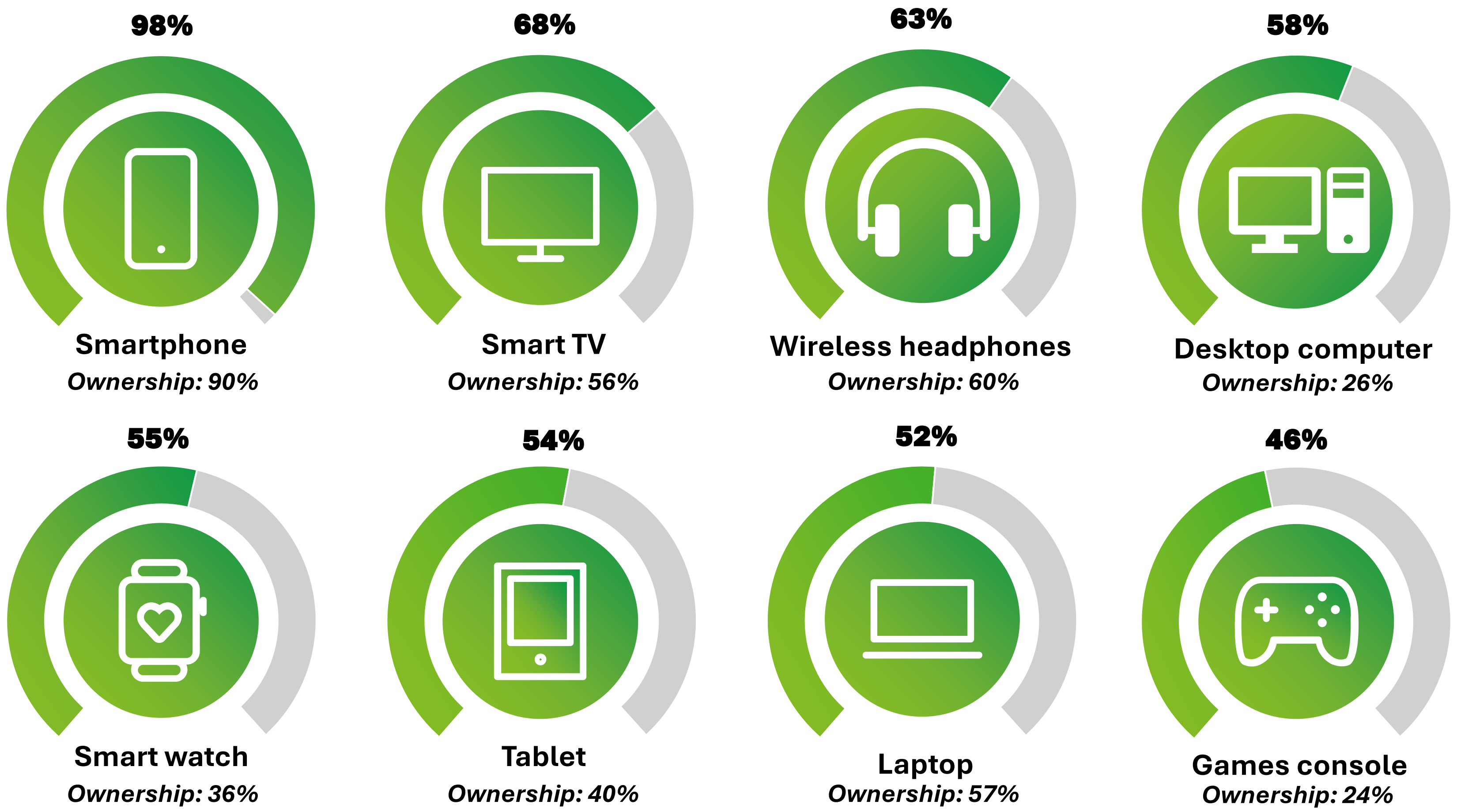
Device adoption in Saudi Arabia shows a slight upward shift, with most categories increasing year on year, albeit marginally in some, and decline in adoption of fitness band, desktop PC and e-reader. The most significant gains come from every day digital devices: smartphones rise from 84% to 90%, wireless headphones from 54% to 60%, tablet from 36% to 40%, and smart watch from 33% to 36% – indicating a stronger reliance on personal digital ecosystems.

At the same time, with smartphone adoption now reaching 90%, the category is approaching saturation. Whereas the adjacent segments (like smart watch, desktop, fitness band, etc.) also seem to hit a plateau – remaining relevant only to self-selecting consumer rather than being a category of mass adoption.

While KSA may be moving into a digitally enabled lifestyle with widespread digital services adoption, there is still room for higher adoption and opportunity for device manufacturers / service providers, given that the adoption rates for devices are much higher in markets like UK across laptops, tablets, smart watches and portable games player. At the same time, the fact remains that multiple categories that once promised scale – portable game players, VR headsets, or e-readers – remain niche and are showing clear signs of stagnation.

Digital engagement is dominated by smartphones at 98% daily usage, followed by Smart TVs

Devices: Daily usage



Daily usage of devices in KSA remains very strong, led by smartphones with 98% daily usage, supported by a clear rise in ownership now as 90% as compared to 84% last year.

This is followed by Smart TV daily usage at 68% (minor decline from 70% daily usage last year), with increase in ownership from 48% last year to 56% this year.

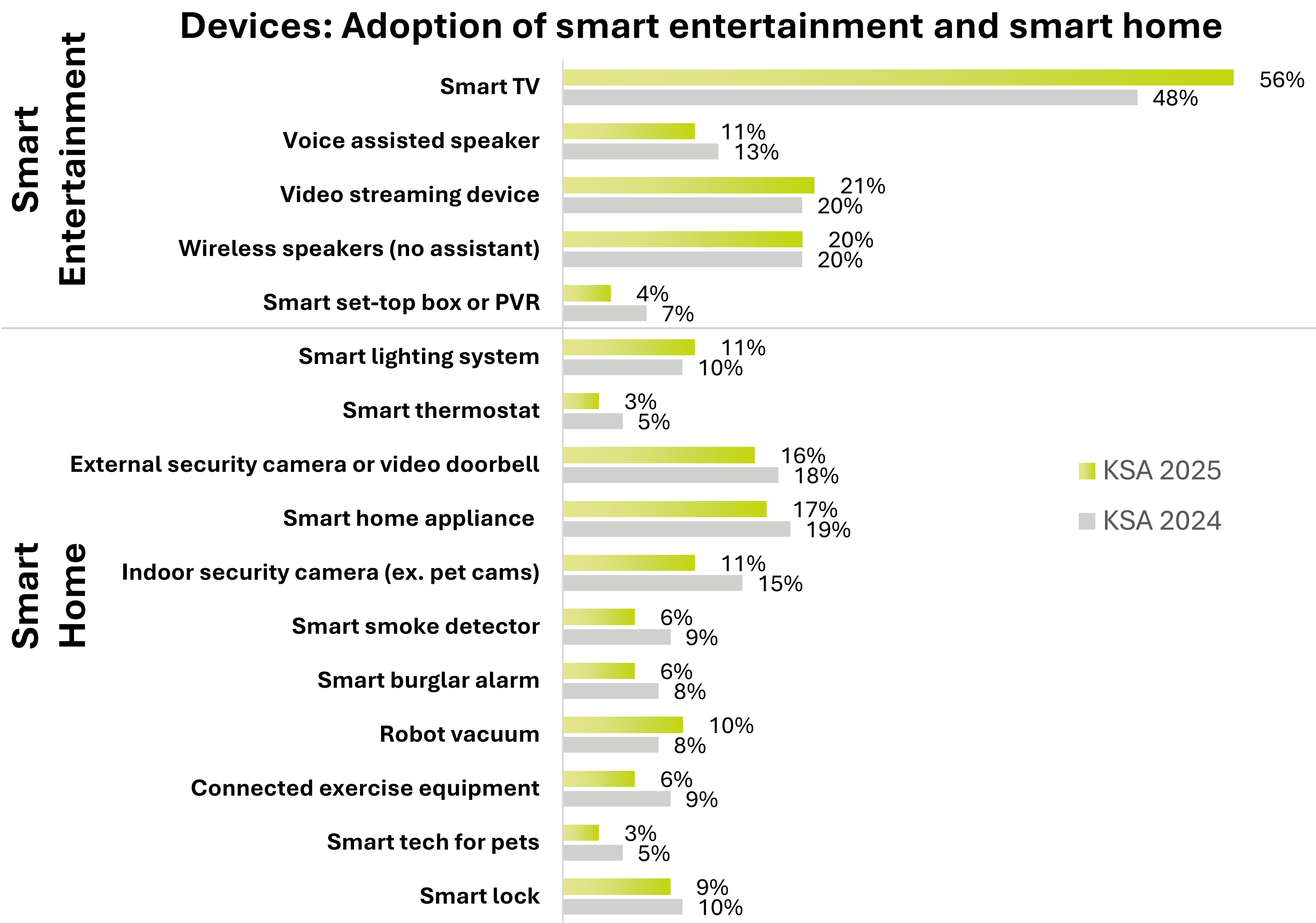
In the UK, smartphone daily usage is 96% followed by smart TV (80%) and smart watch (67%).

Question: When was the last time you used any of these devices. Was it within the...? [Last day]

Weighted base: All respondents aged 18-50 years, KSA 2025, with a smartphone (897), Tablet (395), smart watch (361), smart TV (559), desktop computer (263), Wireless headphones (604)

Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024

Adoption of smart home devices continue to remain low



Question: Which, if any, of the following connected devices do you own or have ready access to?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

Smart entertainment adoption in KSA shows steady growth, led by Smart TVs increasing from 48% to 56%, reinforcing their role as the primary entry point into the smart-device ecosystem (still lower than UK wherein smart TV adoption is 72%). Even the current adoption in KSA remains lower than expected for a mature consumer electronics category, given the high mobile penetration which fulfills the primary entertainment and streaming needs.

The smart home devices are losing steam, wherein adoption has stagnated or declined across the categories. While devices like robot vacuums and smart lighting see a modest increase in adoption, however, remains niche, and is largely driven by affluent or convenience seeking households, rather than mass adoption. The market has moved beyond the initial hype phase and entered to a 'reality-check' – competing on price vs. utility, and everyday usage.

Planned smartphones purchases continue to outpace the broader smart device ecosystem

Devices: Planned purchase in next twelve months

Smartphone
42%
39% in last year

Tablet
15%
17% in last year

Laptop
24%
23% in last year

Desktop
9%
12% in last year

Smart watch
24%
25% in last year

Fitness band
12%
13% in last year

Smart TV
22%
25% in last year

Wireless headphones
21%
23% in last year

Portable games player
10%
13% in last year

Games console
14%
17% in last year

VR headset
9%
12% in last year

Voice-assisted speaker
9%
13% in last year

86%

of consumers plan to purchase a connected device in the next 12 months

Smartphones dominate the planned purchases (42%) across the device categories, making a 3-percentage-point increase YoY and signaling sustained momentum driven by high adoption and usage. High renewal cycles are reinforcing smartphone dominance – and remain clear priority for consumer spend. In contrast, the purchase intent for other smart devices is mostly declining or remain stagnant, highlighting category maturity and limited near-term growth potential.

The demand for planned device purchase is driven by the younger generations with 90% Gen Zs planning to purchase a connected device in the next 12 months, as compared to 84% millennials and 75% Gen X.

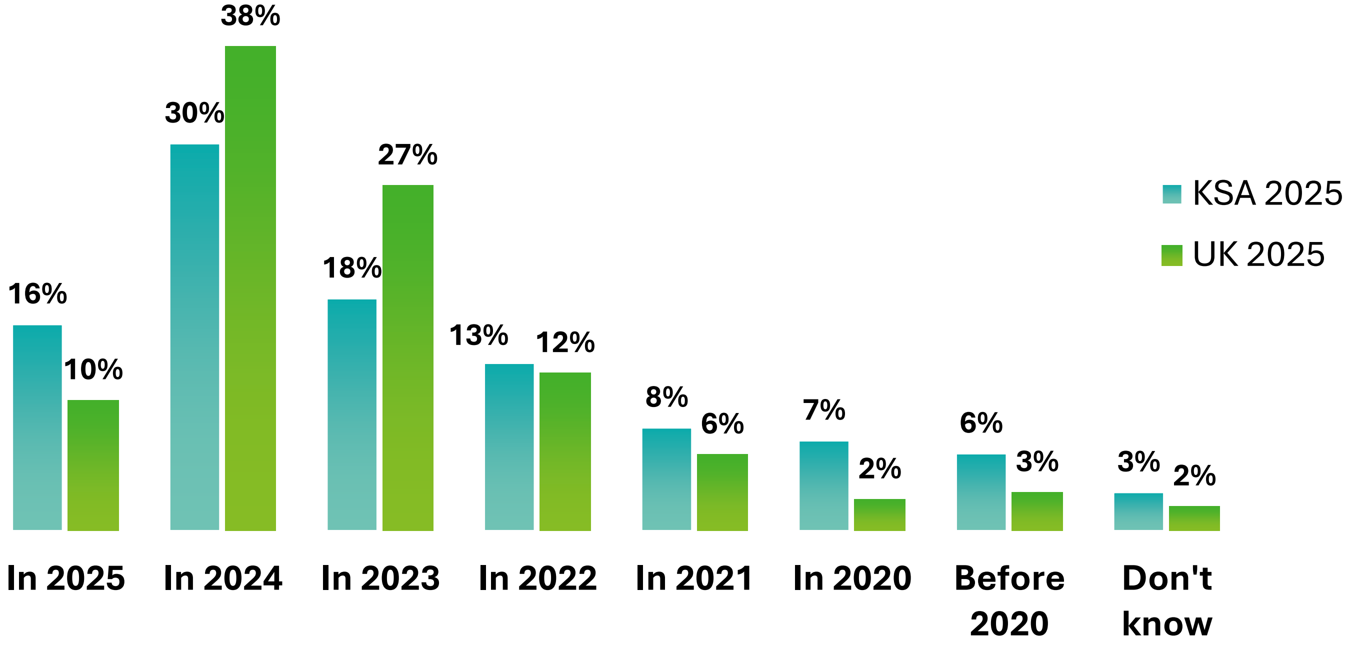
Question: Which, if any, of the following devices do you intend to purchase in the next 12 months?
Weighted base: All respondents aged 18-50 years, KSA 2025, (1,000); KSA 2024 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024

Consumers demonstrate a clear shift towards longer smartphone retention and slower replacement cycles

The replacement cycle has lengthened, with only 16% of consumers in KSA receiving / buying their current smartphone in year 2025, as compared to 30% in year 2024. The reasons could be many – innovation and perceived benefits have become incremental, premium pricing has escalated making flagship devices less affordable, and existing devices now deliver 'good-enough' performance for longer – shifting smartphones from a discretionary upgrade to a medium-term utility purchase.

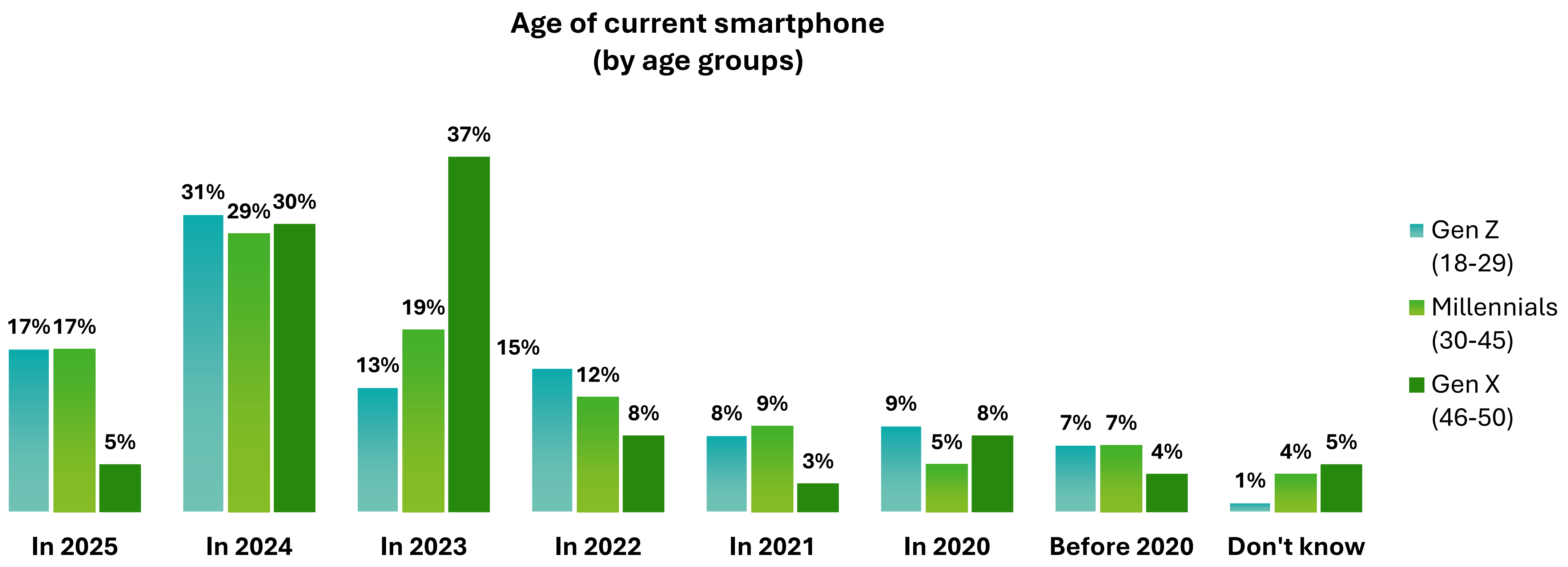
In the UK, the shift is even more pronounced, with just 10% receiving a 2025 device and many still using handsets received in 2024.

Age of current smartphone



Question: When did you buy or receive your current phone?
Weighted base: All respondents aged 18-50 years, who have a phone or smartphone (half sample – sample A), KSA 2025(462), UK 2025(1,095)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Gen Z and Millennials lead the smartphone upgrades, while Gen X holds onto older devices, showcasing generational tech preferences



Question: When did you buy or receive your current phone?
Weighted base: All respondents aged 18-50 years, who have a phone or smartphone (half sample – sample A), KSA 2025(462)
Source: Deloitte Digital Consumer Trends, KSA 2025

Networks

Digital Consumer Trends 2026, KSA Edition

Evolving Patterns of Networks landscape in Saudi Arabia

39%
5G users always experience full 5G coverage and speed

50%
Perceived to have better mobile network quality in last one year

56%
Gen X use a mobile operator's network as their primary data connection

50%
Users are tempted by higher speeds to switch their mobile network operator

45%
Are tempted by better coverage to switch their mobile network operator

65%
Consumers opt for broadband bundling with other services

29%
Prefer "wi-fi booster" as their bundling option for broadband

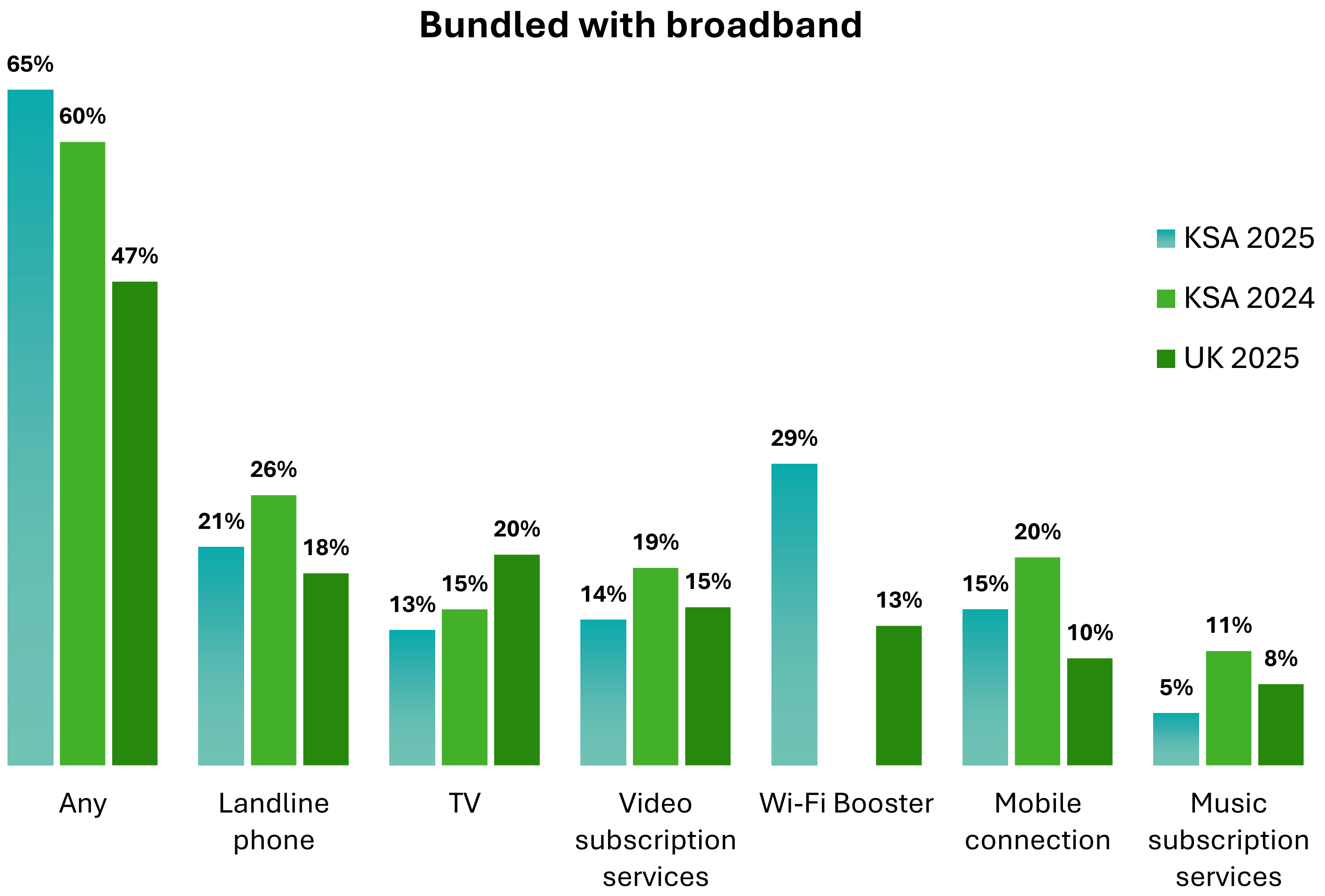
5%
Choose "music subscription" bundle – a significant drop from last year

KSA shows high uptake of broadband bundles which reflects that consumers are prioritizing enhanced in-home connectivity and network performance

In KSA, broadband bundling is relatively common, with 65% of consumers reporting at least one service bundled with their broadband.

The most frequent inclusions are Wi-Fi boosters (29%), followed by landline phones (21%), and mobile connection (15%); indicating that bundling is driven more by connectivity enhancement rather than media / content related services.

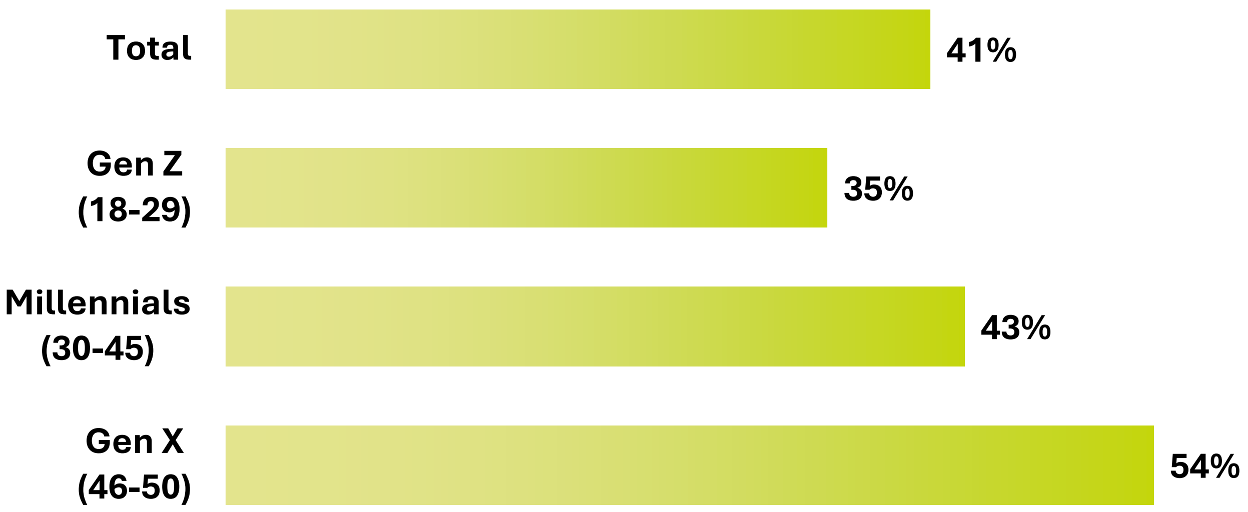
In the UK, bundling is more limited (47%) overall, with the most common inclusion being TV services (20%).



Question: Is your broadband service at home bundled with any of the following?
Weighted base: All respondents aged 18-50 years, who have home broadband, KSA 2025 (225), UK 2025 (1,564)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Gen X increasingly use a mobile operator's network as a primary data connection

Network: Primary connection used by a person at home is data from a mobile operator's network (e.g., 4G/5G) – usually on a smartphone or tablet, which may be used as hotspot to tether other devices



Question: Which, if any, of the following types of internet or home broadband connection is the MAIN one you use in your household?
Weighted base: All respondents aged 18-50 years, 2025 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025

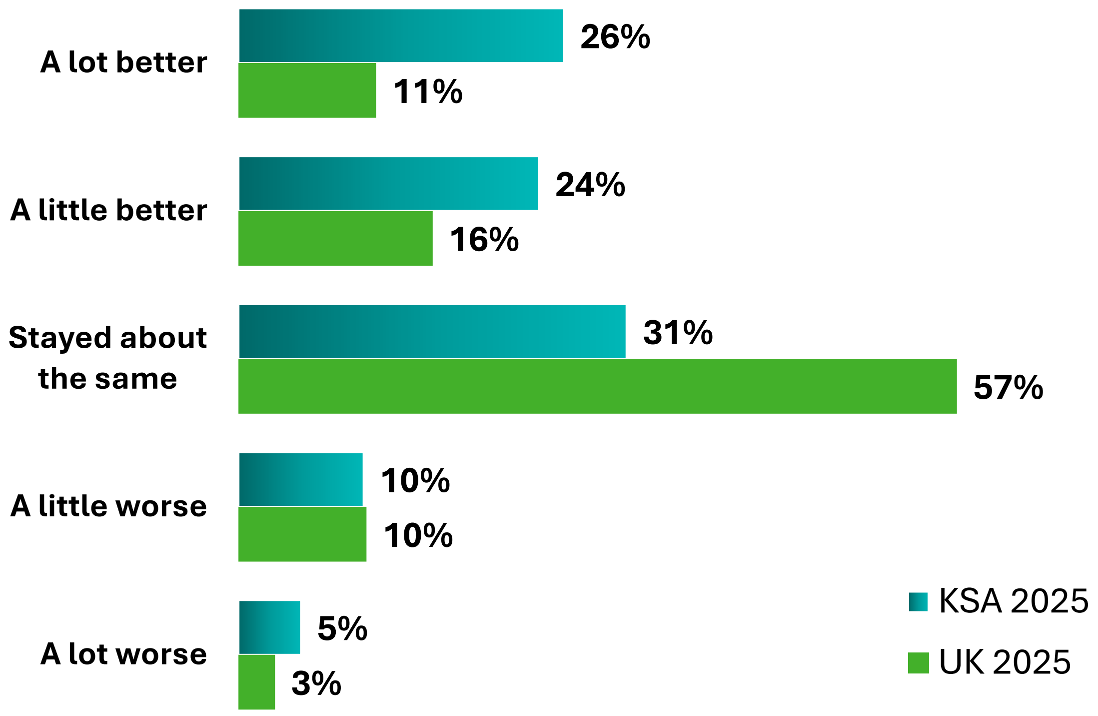
Use of mobile data as the primary home connection is relatively common, with 41% of consumers relying on a mobile operator's network rather than fixed broadband. While the behavior is prominent among Gen X (54%), followed by Millennials (43%); it is interesting that 65% of Gen Z are prone to switching to a fixed broadband / Wi-Fi network when at home – clearly due to higher data consumption needs (they subscribe more for video / music streaming services, as evident in results covered in the next section of report), and more often the home Wi-Fi networks provide with unlimited data packs. This in turn could drive demand for future fixed network connections, once the generation becomes heads of their respective households.

Overall, this is in sharp contrast with the UK market, wherein only 14% use data from the mobile operator's network as a primary connection. In KSA, the high availability and uptake of mobile broadband could be driven by national infrastructure investments such as 77% 5G network coverage across KSA and mobile internet speeds doubling to 215 Mbps, nearly double the global average.*

***Source:** https://www.trade.gov/country-commercial-guides/saudi-arabia-digital-economy-0

Half of the respondents have perceived better mobile network quality in last one year, whereas 31% don't perceive any change

Mobile network: Perceived quality in the past 12 months



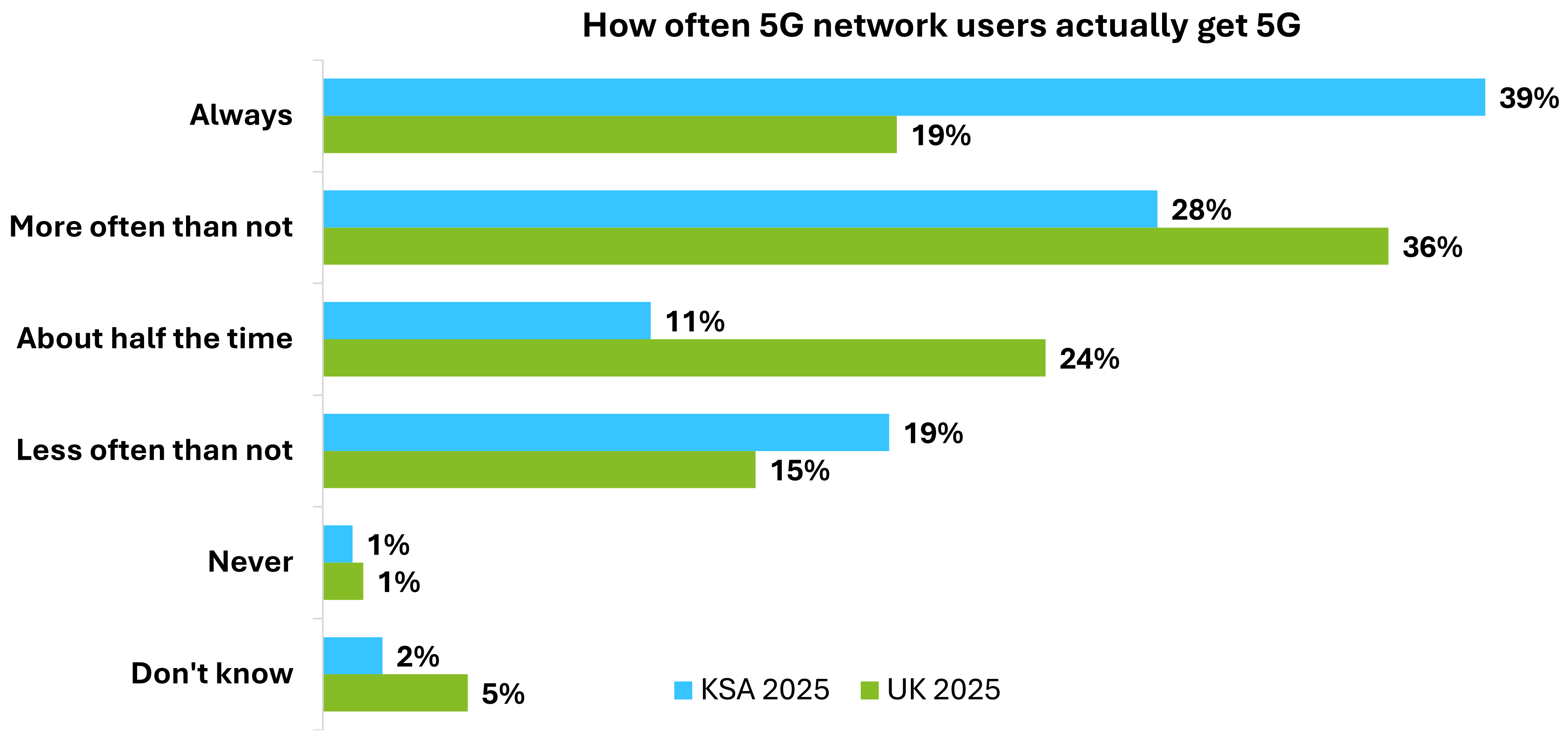
In KSA, the perception of improvement in mobile network quality remain broadly positive, with 26% of consumers saying it has become "a lot better" and another 24% reporting it is "a little better," meaning half of users feel their mobile experience has improved over the past year.

The improved perception proves that consumers are sensitive towards the ongoing efforts by KSA, wherein telecom operators are actively enhancing the network capacity, data quality, and public-facing connectivity (including hotspots and Wi-Fi) – marking a measurable impact on speed and connectivity.

In the UK, majority (57%) of the users have not experienced any change in network quality.

Question: Over the past 12 months, would you say that the quality of your mobile internet service has got better or worse, or has it stayed about the same?
Weighted base: All respondents aged 18-50 years who have a phone or smartphone, KSA 2025 (919); UK 2025 (2,199)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Despite network expansion, only 39% of 5G users in KSA always experience full 5G coverage and speed – although this much better when compared to the UK



Question: Thinking of occasions when you use your mobile operator's network (e.g. 3G/4G/5G, etc.) on your main phone, not Wi-Fi. How often, if at all, do you get 5G network coverage?
Weighted base: All respondents aged 18-50 years, who have 5G on their main phone, KSA 2025 (649); UK 2025 (1,625)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

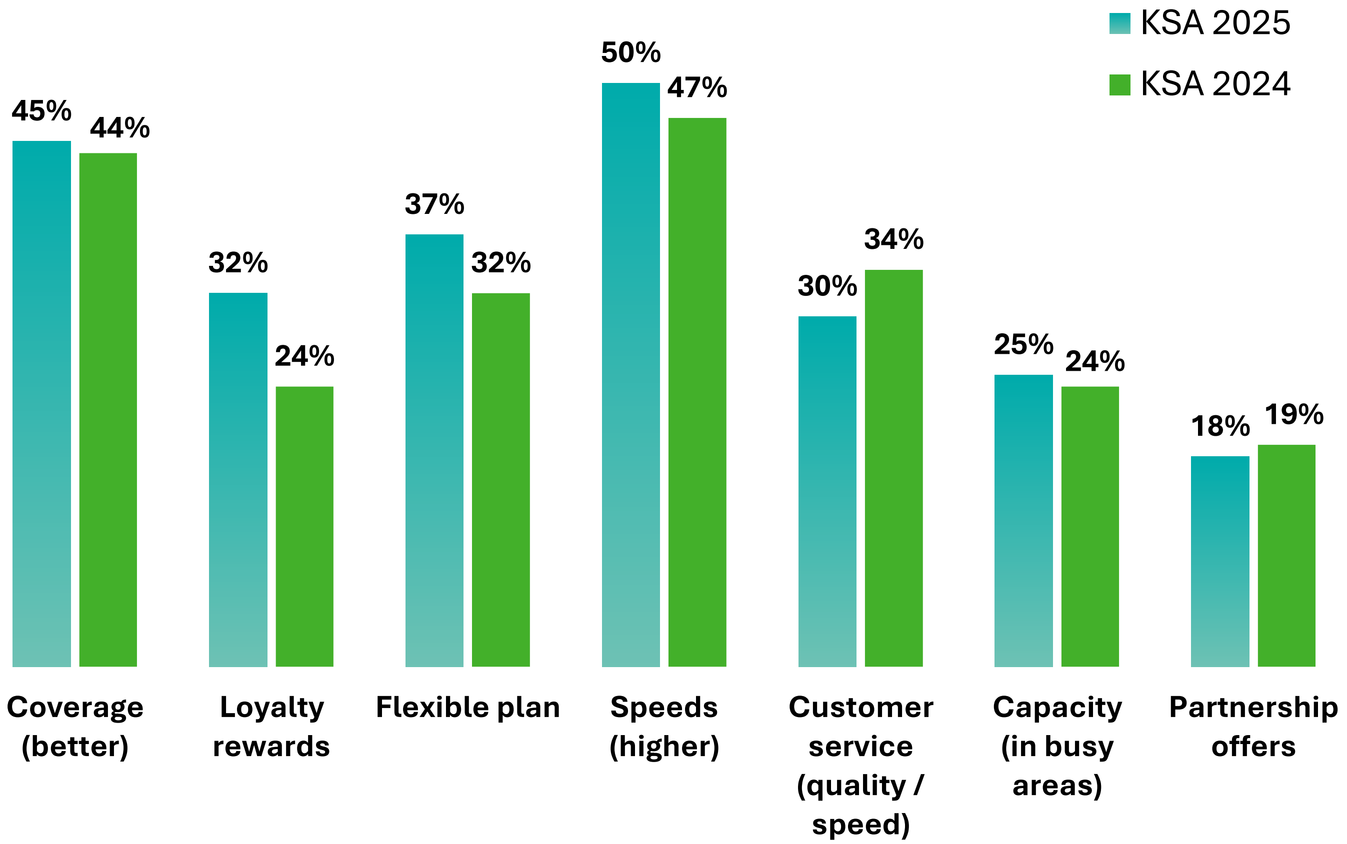
Speed (50%) and Coverage (45%) continue to be the switching motives, as users increasingly demand consistent and high-quality mobile connectivity in daily use

It's clearly evident that core service factors, i.e., speed and coverage remain the key differentiating factors between mobile network operators which encourages the switching of users.

However, this year we witness a **sharp rise in other incentives** linked to more commercial aspects – **loyalty rewards** and **plan flexibility** – as the factors encouraging mobile network churn. This resonates with the fact that, one of the large telco operator (stc) in KSA has enhanced their existing loyalty program through additional collaborations to bring more rewarding experience[1]. Further, with new players coming to the market (Virgin Mobile), we witness innovative plans offering more flexibility[2] to the consumers.

Source: [1]https://www.alriyadhdaily.com/article/35e50f1a28004b5488e03db18d018f9c
[2] https://www.zawya.com/en/press-release/companies-news/virgin-mobile-ksa-launched-switch-postpaid-plans-bringing-all-new-flexibility-and-control-to-customers-in-saudi-arabia-ea7xyeco

Factors that would encourage mobile network churn



Question: Which, if any, of the following would encourage you to switch mobile network provider?
Weighted base: All respondents aged 18-50 years, All adults 18-50 who have a phone or smartphone KSA 2025 (919), KSA 2024 (874)
Above chart doesn't include the options 'none of these' and 'don't know' which are ~4 to 5% for both the years
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024

Video

Digital Consumer Trends 2026, KSA Edition

Evolving Patterns of Video landscape in Saudi Arabia

66%
Gen Zs have access to paid video streaming subscription

41%
Gen Zs have access to paid music streaming subscription

25%
Customers cancelled a video streaming service

23%
Cancelled their video streaming subscription due to limited usage

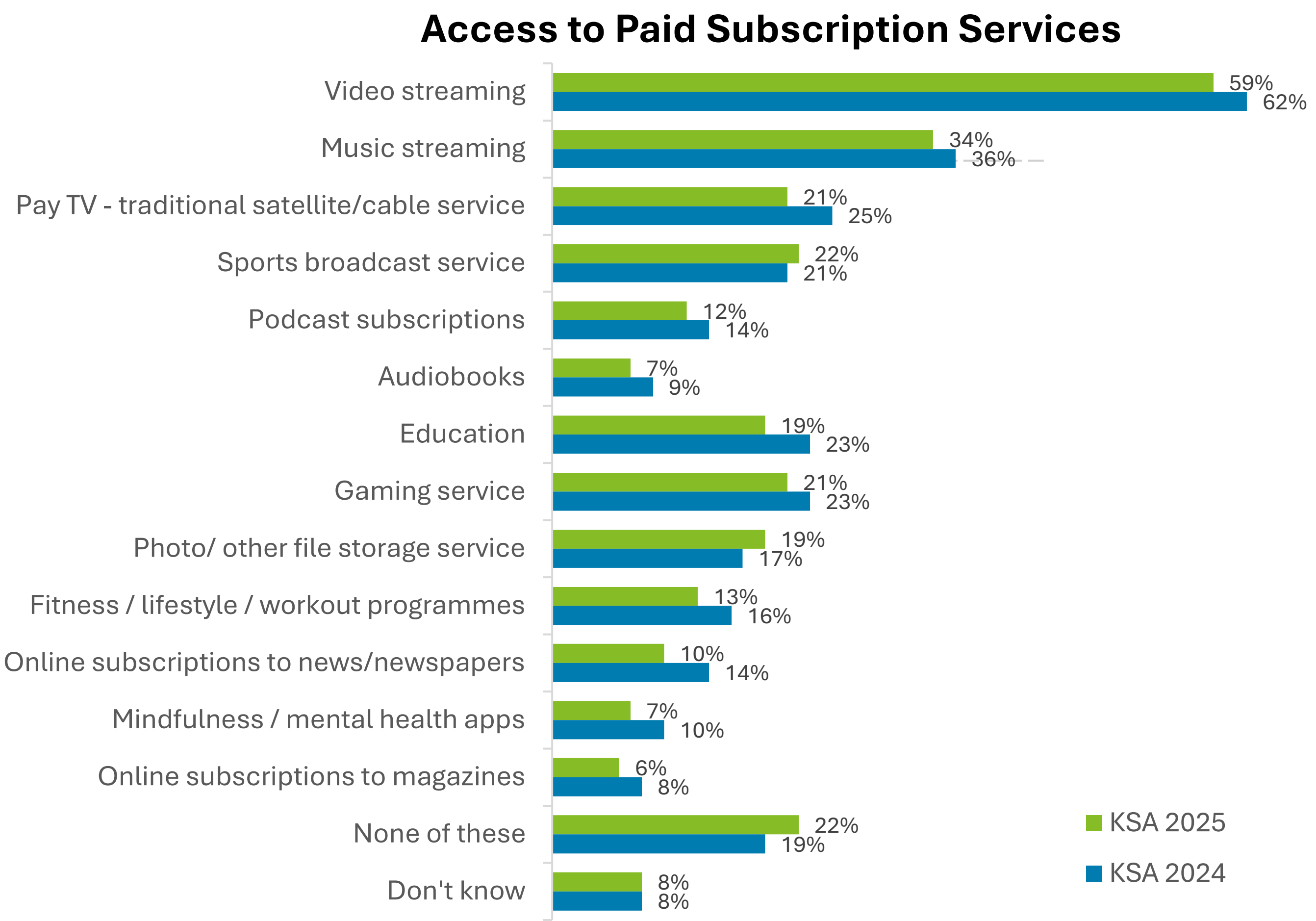
21%
Users cancelled as they believed the video subscription was expensive

43%
Share their video streaming subscriptions with others

26%
Subscribed to a brand-new video streaming subscription

58%
Purchased their subscriptions directly from the service provider

Consumers in KSA are becoming more selective with paid subscriptions, with only Sports and Storage related subscriptions seeing a marginal uptick



Question: Which paid digital subscription services do you have access to?

Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000); KSA 2024 (1,000); UK 2025 (2,276)

Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

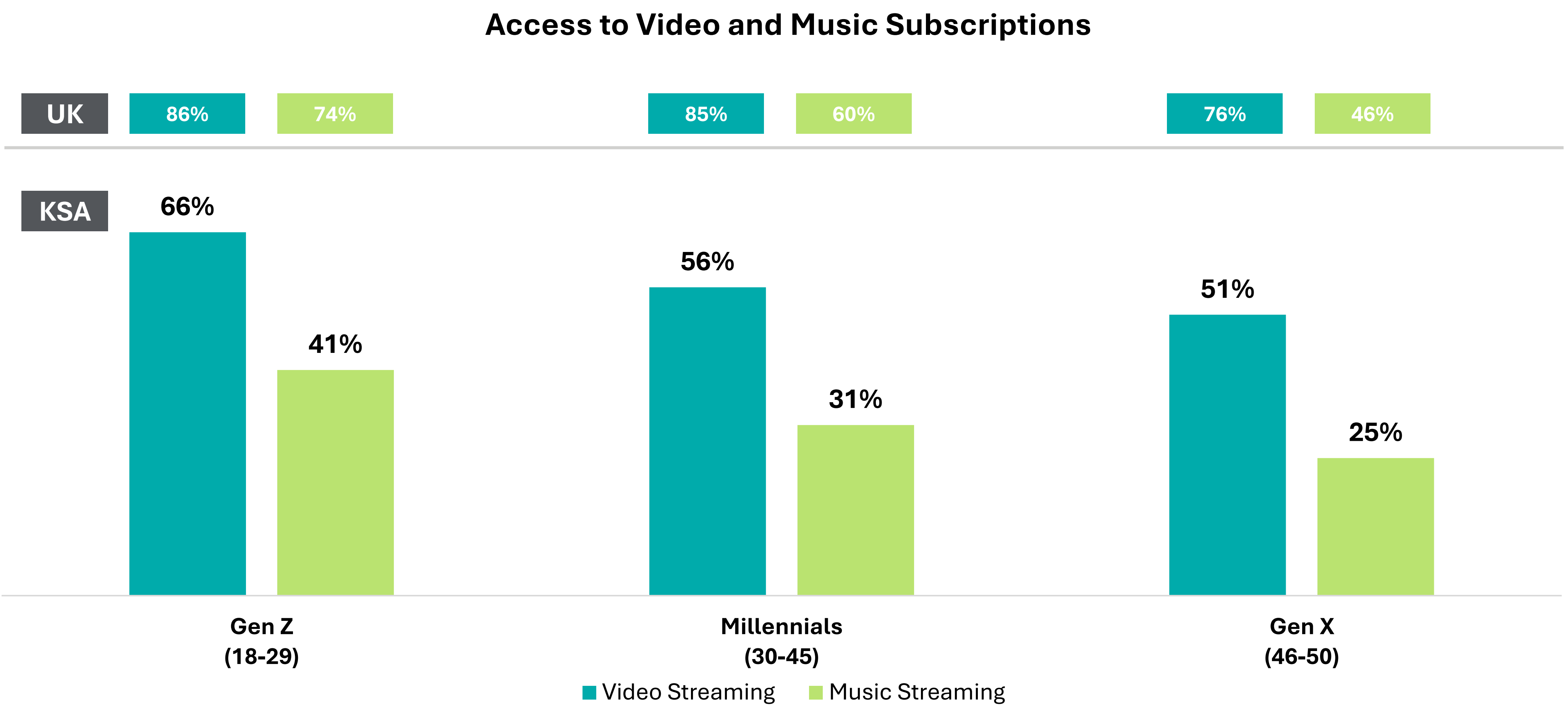
There is a decline in Pay TV usage, from 25% last year to 21% this year, reflecting continued erosion of traditional broadcasting as consumers consolidate around streaming ecosystems. Other subscriptions related to education, gaming, fitness, etc. have also seen a decline, possibly reflecting a shift in demand towards formal ways of learning, sports and fitness.

The movement also aligns with recent dynamics in KSA's digital content market, where telecom-content bundles have expanded, and the focus is on increasingly packaging* entertainment within mobile and home-internet plans.

In the UK, subscription access is led by Gaming services at 29%, followed by Pay TV usage at 27%.

***Source:** https://www.mobily.com.sa/wps/portal/web/personal/services/details/unlimited-social-media/sa-unlimited-social-media/entertainment-bundle

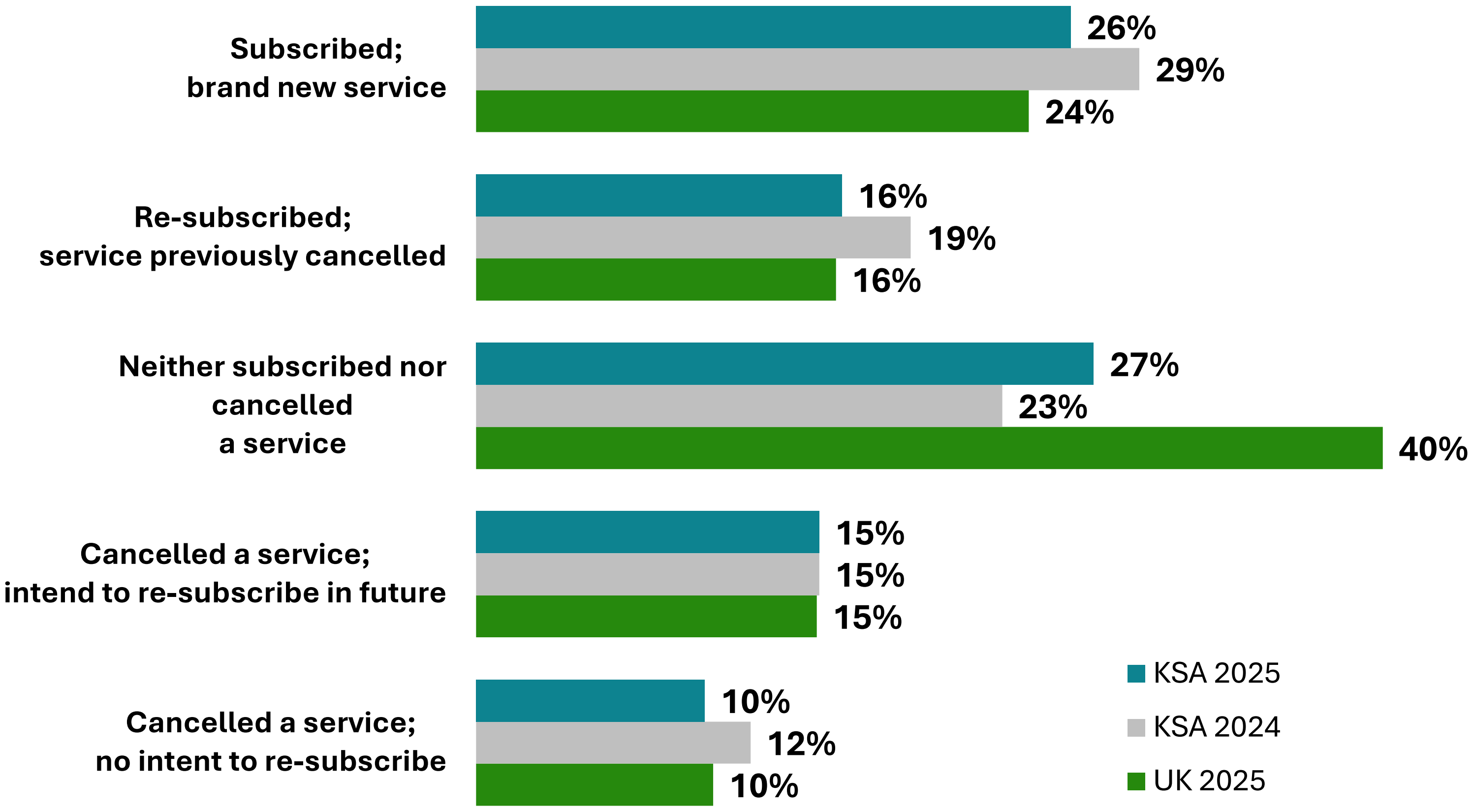
Gen Z leads the subscriptions streams – however, KSA still has a significant untapped consumer base, when compared to the UK



Question: Which paid digital subscription services do you have access to?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025

Sign-ups are becoming less frequent, and cancellations are dropping, indicating a more stable streaming market

Paid video streaming subscription and churning: Past 12 months



42% subscribed to a video streaming service

As compared to 48% last year in KSA

25% cancelled a video streaming service

As compared to 27% last year in KSA

Question: In the last 12 months, have you or your household subscribed to any paid subscriptions for a video streaming service, or cancelled any existing ones?

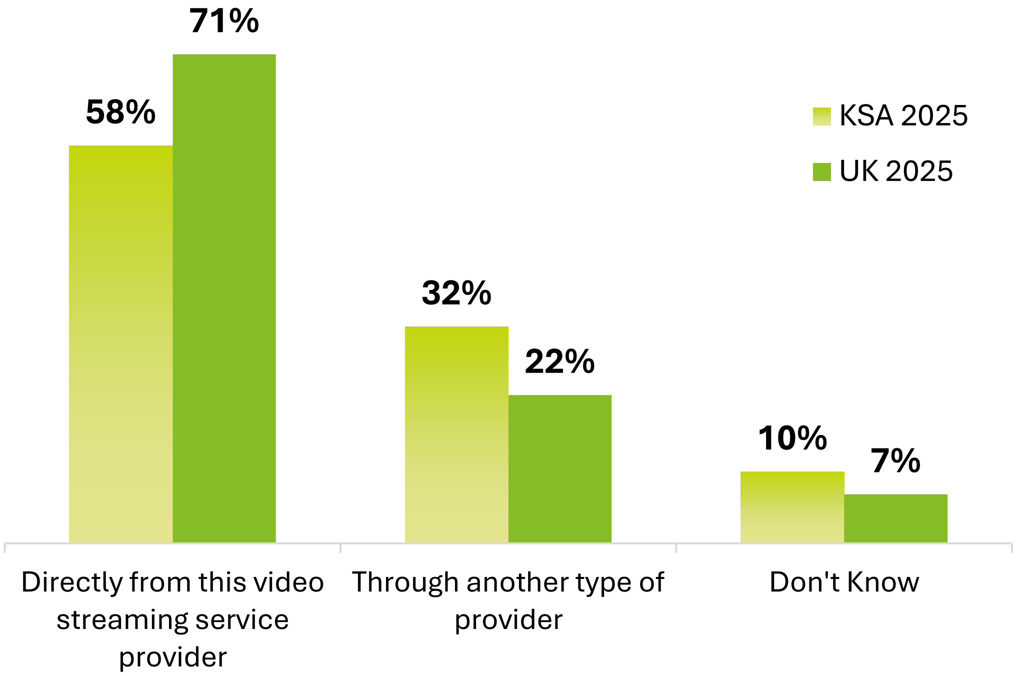
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276); Not shown are respondents who answered Can't Remember

Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

KSA consumers exhibit stronger reliance on third-party purchases of video subscriptions: 10 percentage points higher than the UK

Paid Video Streaming Platforms: Purchased direct vs via a third-party

Asked across five of the most popular paid video streaming platforms. The below represents proportions of the number of total subscriptions taken out by KSA and UK users



While 58% of KSA users subscribe directly through the streaming service, a significant 32% use third-party provider, as compared to only 22% in the UK market. This is consistent with the earlier findings (65% preferred broadband bundling in KSA, as compared to 47% in the UK) – clearly indicating that consumers in KSA favor bundled offerings, making 'bundling' a critical accelerator of the market growth.

In KSA, the video subscription market is increasingly driven by the offers and benefits provided by telco players like stc, allowing consumers to access both regional and global OTT platforms through bundled packages[1] and offerings, such as stc TV[2]. This trend is further supported by strategic collaborations between global and regional players (e.g., Netflix–MBC partnership[3]), which expands content availability. Such bundling gives consumers more flexibility and choice, enabling them to subscribe to video services without purchasing directly from the platform.

Source:
1. https://www.stc.com.sa/en/personal/lifestyle/direct-billing/shahid-vip.html
2. https://www.stc.com.sa/en/personal/lifestyle/stctv.html
3. https://gulfnews.com/business/retail/netflix-inks-first-middle-east-content-bundle-deal-with-mbc-group-1.500214071

Question: Which of the following best describes how you took out each of the following paid video streaming subscriptions?

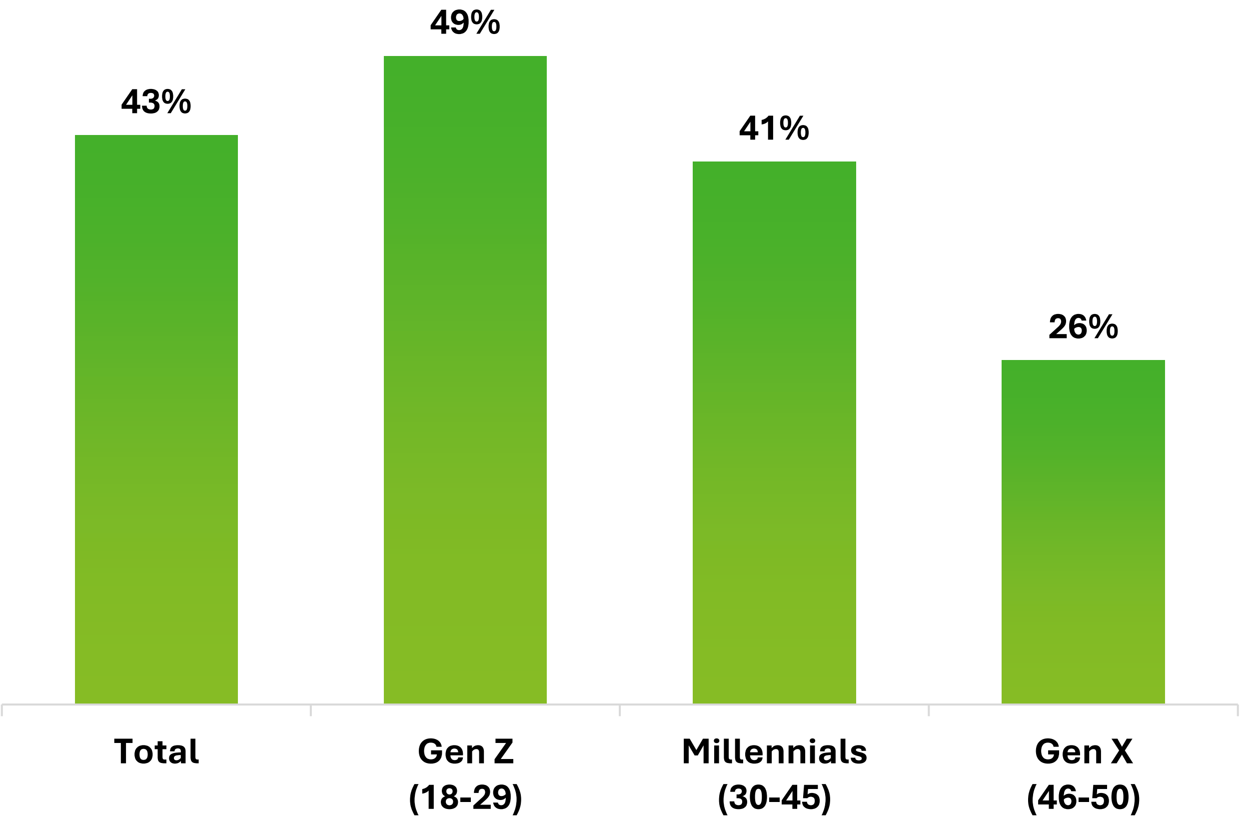
Weighted base: All respondents aged 18-50 years, who have access to each paid video subscription services, KSA 2025 (709), UK 2025 (4,332) - combined across five of the most popular paid video platforms

Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

As expected, sharing of paid video subscriptions drops, but Gen Z is showing some resistance

At overall level, 43% users continue to share their subscription account, which is a significant reduction from 52% till last year – clearly a **declining trend with ongoing account sharing crackdown by OTT** platforms, enforcing stricter rules, and better monitoring. Yet, the **younger generation continues to lead in sharing their accounts**, outpacing Gen X. This isn't surprising – with larger social circles, stronger digital habits, and a cost-conscious mindset, they see sharing as low-risk and high-reward. For them, splitting subscriptions feels natural, reinforcing both connectivity and savings.

Paid video streaming subscriptions: Sharing outside the household



Question: How many households share the following accounts? [Asked of three major streaming services]
Weighted base: All respondents aged 18-50 years who have access to a specific paid video subscription service, KSA 2025 (591)
Source: Deloitte Digital Consumer Trends, KSA 2025

Online

Digital Consumer Trends 2026, KSA Edition

Evolving Patterns of Online landscape in Saudi Arabia

42%
Turned-off all app related notifications

22%
Set screen time limits on their device

25%
Deleted a social media app as the content was inappropriate

41%
Believe 16 years plus is appropriate age for social media access

68%
Are in the favor of social media ban for 16 years & below

42%
Have seen online misinformation more regularly in last 12 months

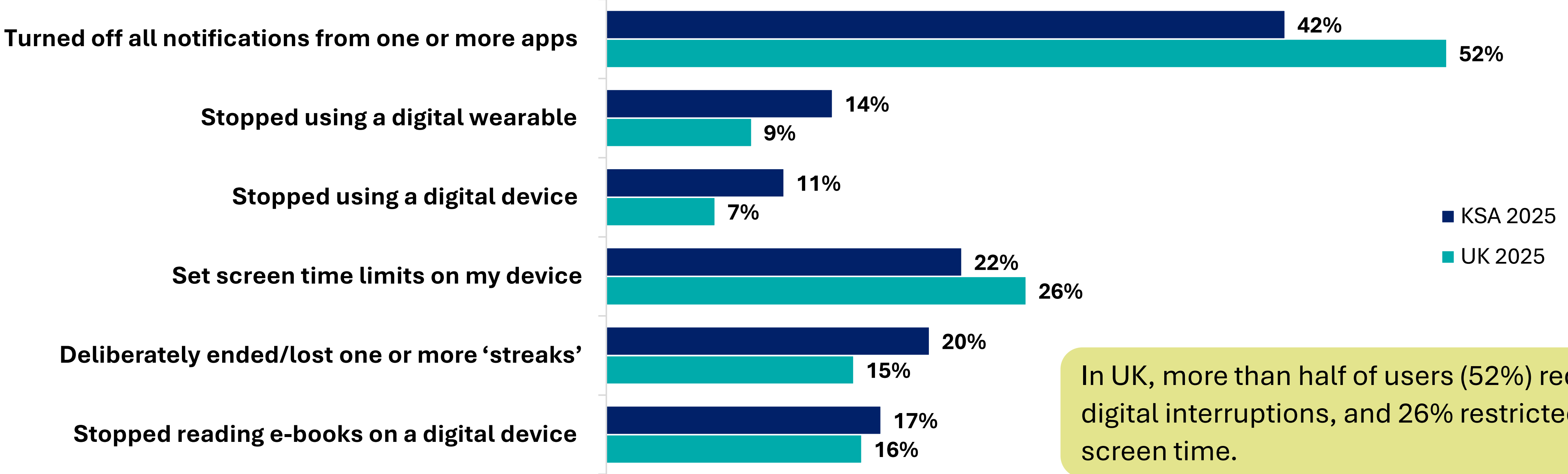
60%
Social media is the most preferred method to stay updated on news

52%
Gen X prefer TV news to stay updated on current events

Many consumers in KSA are actively cutting back digital usage, with two in five turning off app notifications and one in five setting screen-time limits

42% of consumers have turned off notifications and 22% have set screen-time limits. Additionally, 20% have intentionally ended a digital "streak," indicating that users are becoming more intentional and selective in their digital engagement. This shift is likely influenced by rising wellbeing awareness and the country's broader move toward healthier lifestyle habits, where reducing digital overload is increasingly seen as part of overall personal balance and productivity.

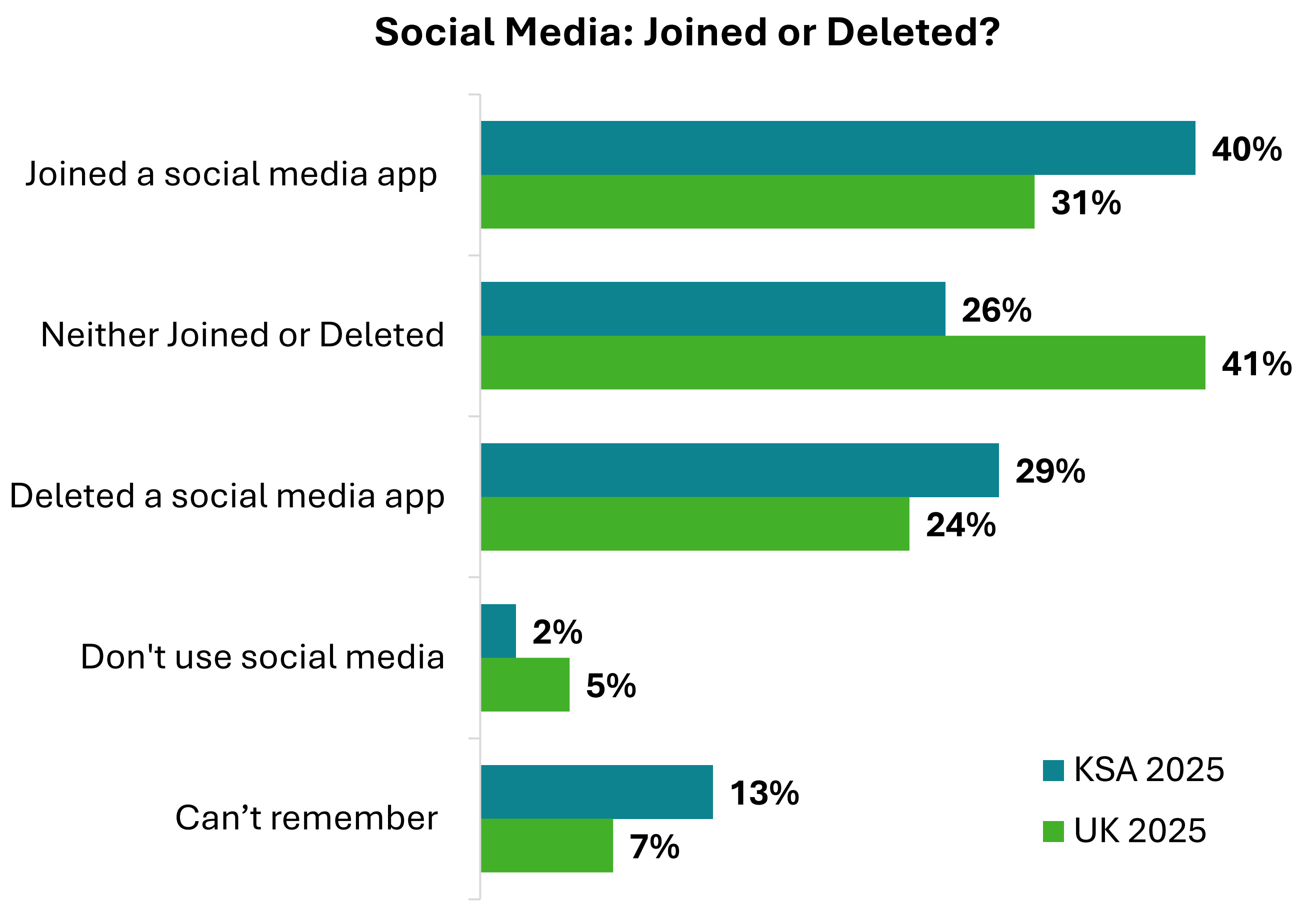
De-Digitization: Which of these have you done?



In UK, more than half of users (52%) reduced digital interruptions, and 26% restricted screen time.

Question: Which, if any, of the following have you done within the last 12 months MAINLY to reduce the use of technology or digital devices?
Weighted base: All respondents aged 18-50 years, KSA 2025 (833), UK 2025 (1,632)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Digital discipline on the rise, yet 40% continue to join social media apps



While a significant proportion of users are actively managing their digital consumption – evidenced by many turning off notifications and setting personal screen-time limits – underlying demand for social media remains resilient. Notably, 40% of users in KSA joined a social media platform in the past year, this includes a sizeable cohort of users who had previously deleted an app but subsequently rejoined. This churn-and-return behavior suggests that disengagement is often temporary rather than permanent. The adoption seems to be driven by factors, such as access to offers and referral incentives, social media as a key news source, experimentation with newer platforms, and the need for passive participation to stay connected with trends and cultural conversations.

In the UK, deletions are lower at 24%, while 41% made no changes at all, indicating more stable social media habits.

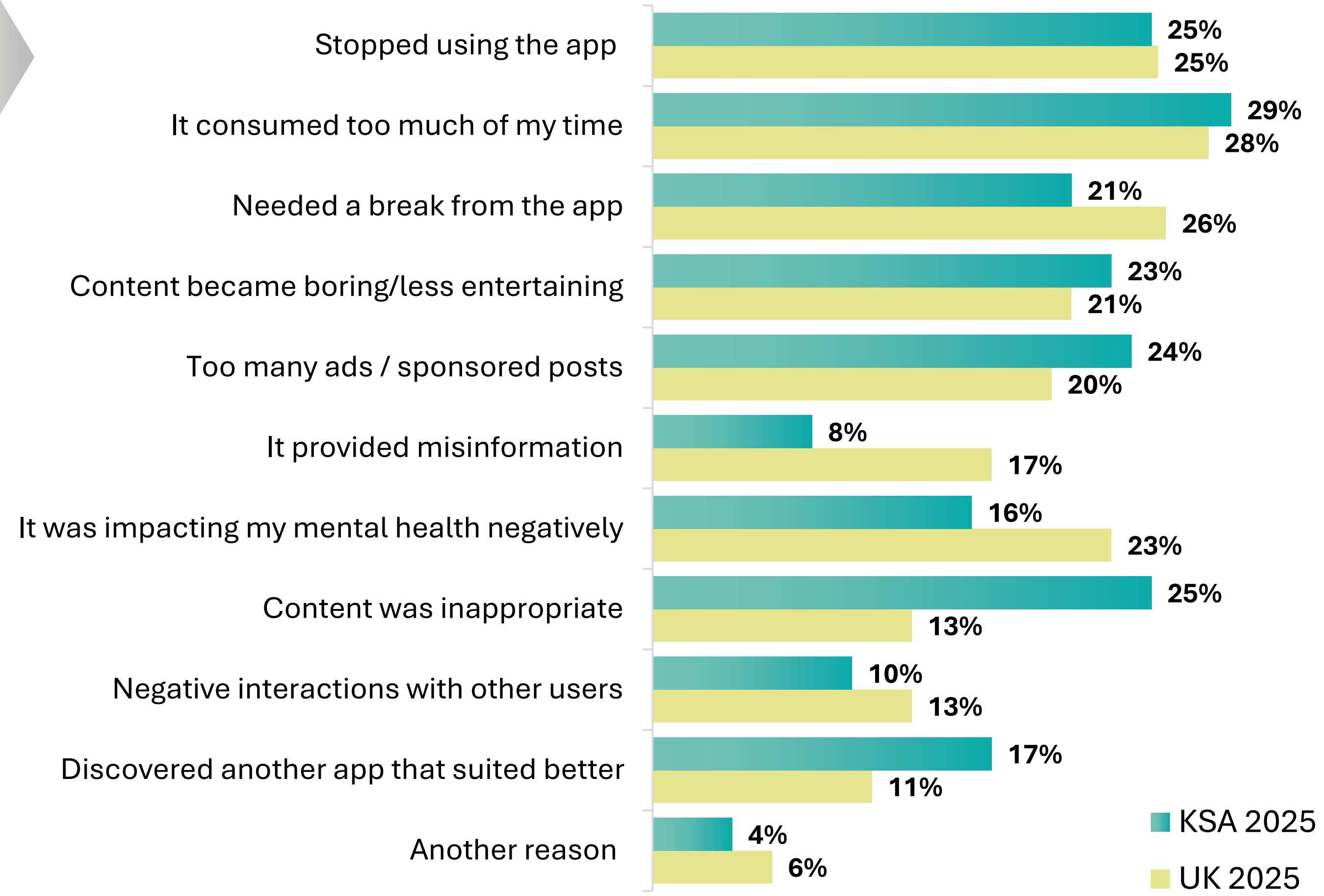
Question: In the last 12 months, have you joined any social media apps or deleted any existing ones from one or more of your devices?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), UK 2025 (2,276)
Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

KSA users delete social media apps over time consumption, inappropriate content, too many ads, and content fatigue

29% deleted a Social Media app in the past 12 months

In KSA, nearly 29% of users made a conscious decision to delete a social media app in the past year, signaling rising platform fatigue. The primary triggers were excessive time consumption impacting social life, increasingly boring content, too many ads, and exposure to inappropriate content. Notably, 25% perceived content as inappropriate – almost double the UK at 13% – potentially reflecting stronger cultural sensitivities. Surprisingly, misinformation plays a much smaller role in driving deletions in KSA, cited by just 8% of users (versus 17% in the UK), pointing to a clear divergence in what consumers perceive as the most pressing platform concerns.

Social Media: Reasons for Deleting

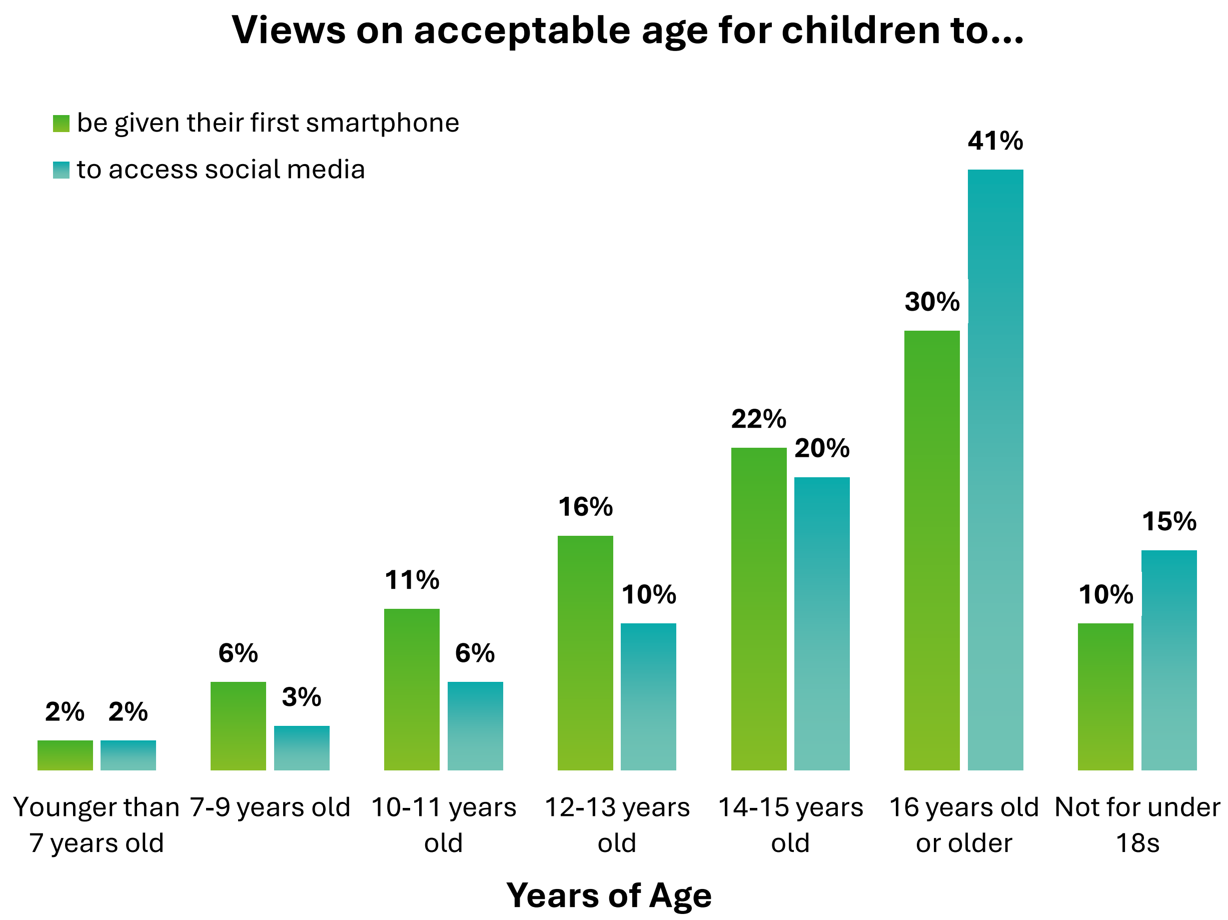


Question: You mentioned that you have deleted a social media app in the last 12 months. What prompted you to make this decision?

Weighted base: All respondents aged 18-50 years, who have deleted social media temporarily or permanently in the past 12 months, KSA 2025 (406), UK 2025 (750); excludes "Don't know"

Source: Deloitte Digital Consumer Trends, KSA 2025; UK 2025

Two-fifths of KSA respondents feel the appropriate age for social media access should be 16 years or older – child safety takes center stage



In KSA, 41% of the respondents believe that social media access should only be permitted for those aged 16 & above – a significant share expressing concern about the impact of digital platforms on younger teens. This aligns closely with sentiments in the UK, where 37% echo preference for raising minimum age for social media use – reflecting growing public unease about online harms and adolescent wellbeing.

The momentum is building across many countries to have stricter age-based restrictions on social media access. This includes, Australia (enforced Online Safety Amendment Act and bans children under 16 from holding accounts on major social media platforms), France (proposal to bar children below 15), Spain (planning to ban below age of 16), Germany (in discussions to ban social till age of 14), and Kazakhstan (considering to ban under the age of 16) – to name a few. In a nutshell, child safety is fast becoming a structural – not optional – priority for the industry.

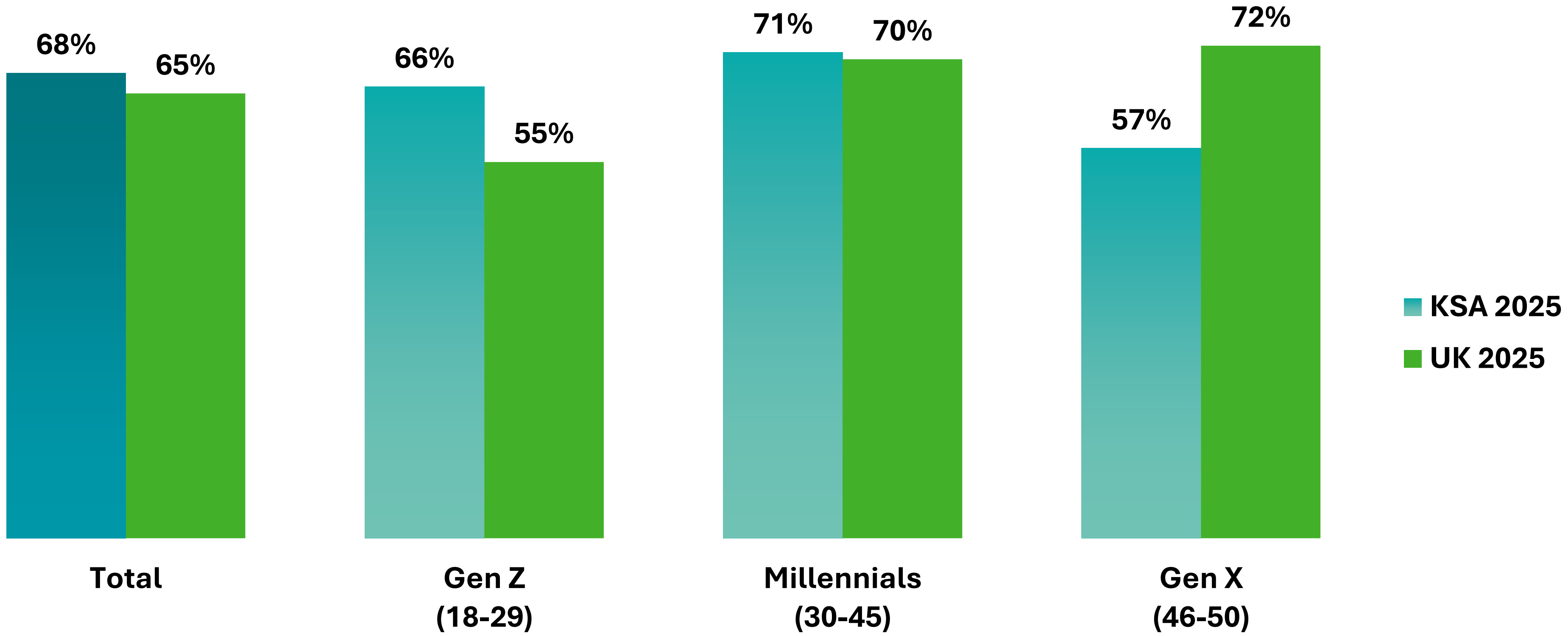
Question: At what age do you think it's acceptable for a child...? - to be given their first smartphone for their own personal use? - to access social media for their own personal use?

Weighted base: All respondents aged 18-50 years, who have a phone or smartphone, KSA 2025 (919)

Source: Deloitte Digital Consumer Trends, KSA 2025

In KSA, surprisingly, Gen Z are the main generation favoring social media ban for under 16s with 66% in favor – UK shows the opposite: older generations push for restrictions

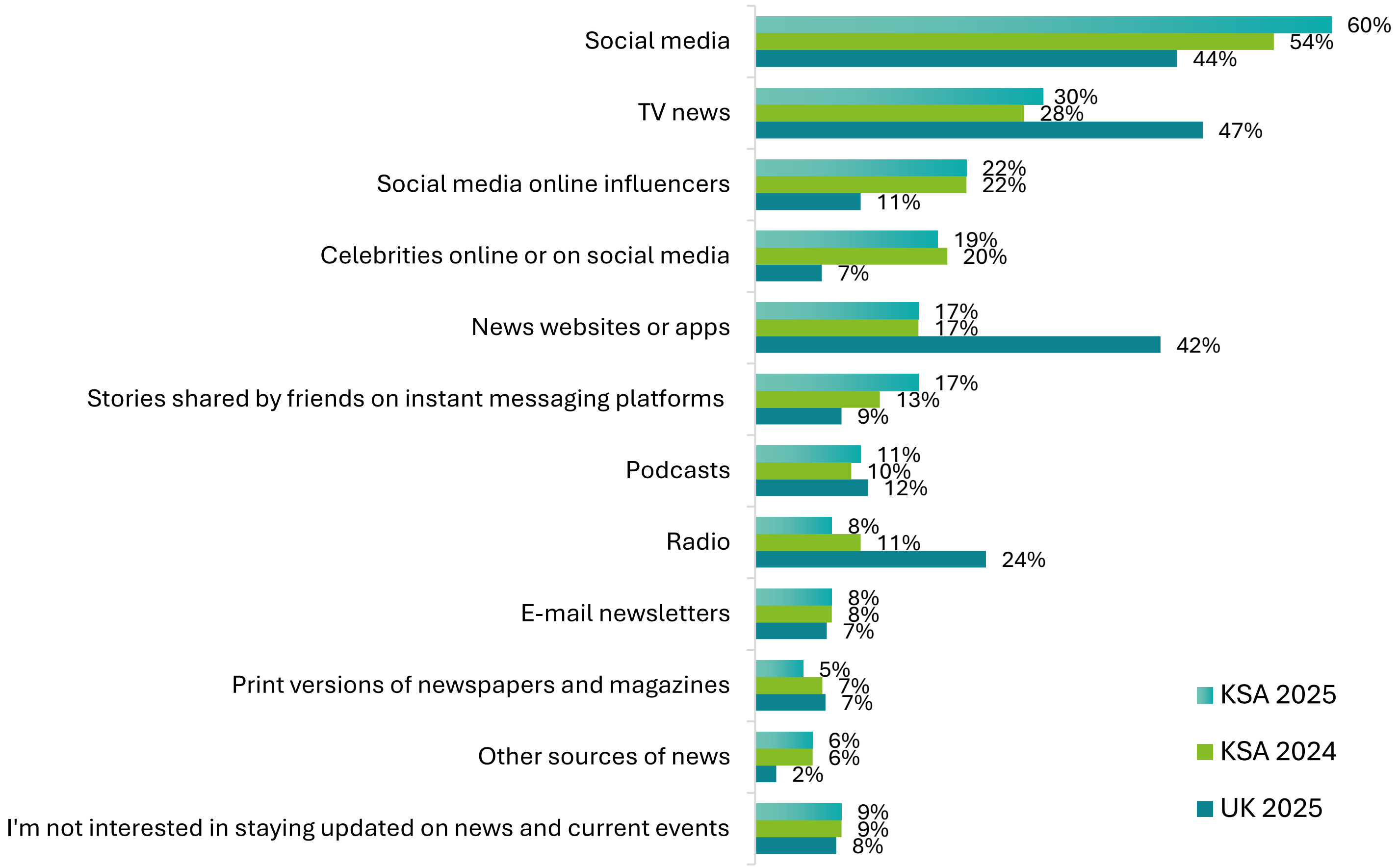
Favor a social media ban for under 16s



Question: To what extent would you favor or oppose the implementation of... Banning social media usage for people younger than 16 years old?
Weighted base: All respondents aged 18-50 years, who have a phone or smartphone, KSA 2025 (919)
Source: Deloitte Digital Consumer Trends, KSA 2025

Social media continues to remain the top news source in KSA

Preferred news source (in the top three)



Question: Which, if any, of the following are your most preferred methods to stay updated on news or current events?

Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)

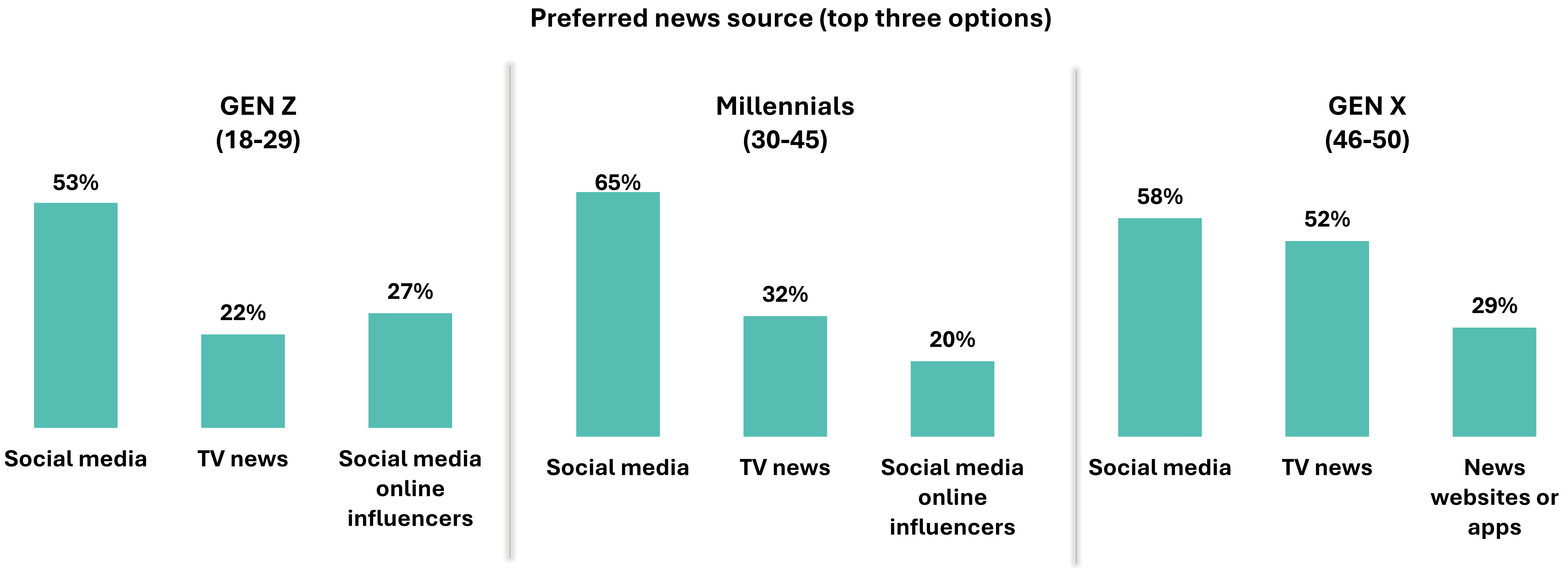
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025

In KSA, social media has firmly established itself as the leading source of news, with 60% of consumers turning to platforms for updates – a notable increase from 54% last year and significantly higher than 44% observed in the UK. This rise highlights the growing reliance on digital networks, social media influencers, and instant messaging apps – in shaping public opinion and delivering news in real-time.

In contrast, traditional media continues to hold stronger influence in the UK. Television, news websites & apps, radio – remain trusted source, supported by a culture of reliance on established, reputable broadcasters known for editorial standards and fact-checking. Whereas TV news in KSA has only seen a modest 2-percentage-point increase from last year, news websites / apps growth has been stagnant, and radio has further witnessed a decline – clearly highlighting the decline of traditional news sources.

This divergence underscores a key behavioral difference: KSA audiences increasingly rely on social and peer-driven channels, whereas UK consumers continue to value structured, verified, and professionally curated news sources.

Social platforms lead as the primary news source across age groups, with television maintaining substantial relevance among Gen X

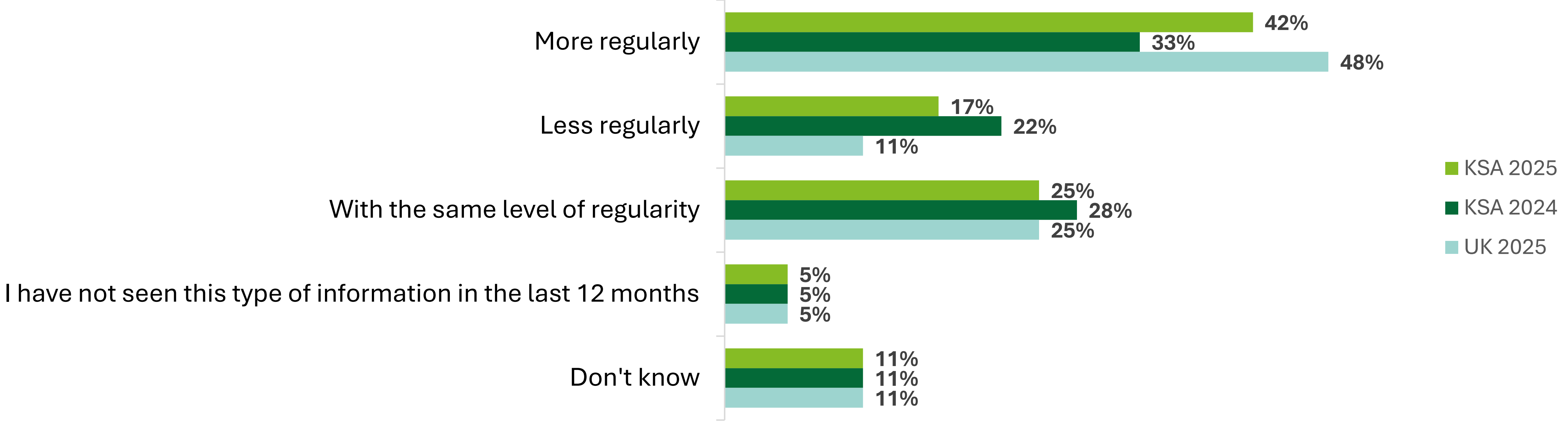


Question: Which, if any, of the following are your most preferred methods to stay updated on news or current events?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000)
Source: Deloitte Digital Consumer Trends, KSA 2025

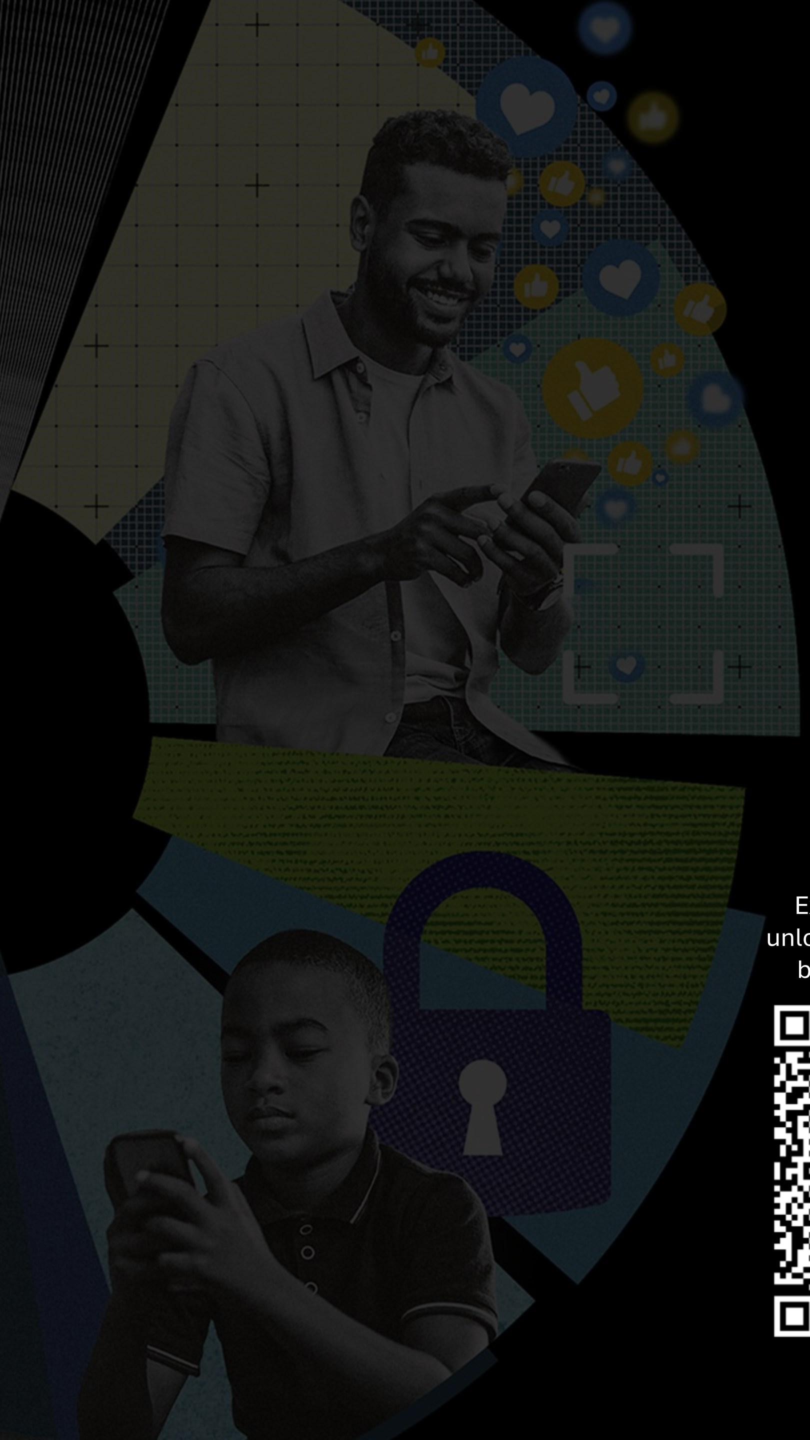
KSA closing the gap on online misinformation awareness

In KSA, 42% of respondents say they now see online misinformation more regularly (up from 33% last year) – this is approaching UK level of 48%, suggesting that the consumers in KSA are becoming more aware of misinformation and gradually catching up with global trends. However, this perception of online misinformation sometimes may be influenced by increased media coverage, social conversations, and awareness campaigns rather than actual exposure. Additionally, self-reported perceptions can differ from reality, as individuals may overestimate their ability to identify misinformation or may interpret 'online information' differently.

Online misinformation: Seeing and identifying



Question: These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?
Weighted base: All respondents aged 18-50 years, KSA 2025 (1,000), KSA 2024 (1,000), UK 2025 (2,276)
Source: Deloitte Digital Consumer Trends, KSA 2025; ME 2024; UK 2025



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