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**Deloitte.**

Let's play, Saudi Arabia!  
Esports

May 2025



# Saudi Arabia's ascent in Esports

Pioneering investments, inaugural events and local players capturing global attention

## Background

Esports has rapidly evolved into a major global phenomenon, blending entertainment, technology and competition. The global Esports market is projected to reach \$4.8bn in revenue in 2025. In Saudi Arabia, revenue is expected to hit \$12.4mn in 2025.

While Saudi Arabian Esports remains relatively small compared to the global market, the country's youthful population (63% under 30) and growing interest in Esports and gaming elevate its status as a market with significant growth potential. Keeping up with the growth sentiment, Saudi Arabia continues to drive growth by implementing strategic initiatives such as hosting major events (e.g., Esports World Cup, 2027 Olympic Esports Games) and investing in infrastructure projects (e.g., Qiddiya's Gaming & Esports District). These efforts align with Saudi Vision 2030 by diversifying the economy, fostering innovation, and creating opportunities in the technology and entertainment sectors.

2017

Establishment of the Saudi Esports Federation as the regulating body for Esports and the gaming industries in Saudi Arabia

2021

Savvy Games Group launched by PIF to drive the long-term growth and development of Esports. Plans announced in 2022 to invest \$38bn in the video games industry

2023

First batch of graduates from the Saudi Esports Academy; a total of 300+ degrees were awarded

2025

Hikaru Nakamura (#1 chess streamer worldwide) recently joined Team Falcons, a Saudi Esports Team. This move also brings international attention to the Esports World Cup

2030

Qiddiya City will have a dedicated Gaming & Esports District covering 500,000m<sup>2</sup> comprising of Esports arenas, facilities and the regional gaming headquarters<sup>1</sup>

2018

The first Major Esports Success of a Saudi player: Mosaad Al Dossary's victory at the FIFA eWorld Cup, he later went on to co-found Team Falcons

2022

Launch of the National Gaming & Esports Strategy to develop the entire Esports and Gaming value chains: unlock economic contribution of \$13bn and create over 39,000 jobs by 2030

2024

The first edition of the Esports World Cup was held in Riyadh and had a record-breaking prize pool of \$62.5 mn and 1.1 mn peak viewers. Saudi Arabia becomes the first ever FIFAe World Cup™ champion featuring Rocket League

2027

The inaugural Olympic Esports Games will be held in Riyadh

2034

Saudi Arabia will host the 22nd Asian Games in Riyadh, with Esports games as official medal events

Note: ● = past highlight, ● = upcoming highlight; <sup>1</sup>Qiddiya opening date to be announced

Source: Statista; GASTAT (2022 census); CNN; Saudi Esports Federation; Inside FIFA; Savvy Games Group; Esports Insider; National Gaming and Esports Strategy; Esports World Cup; insidethegames.biz; olympics.com



# Understanding Esports and gaming consumers in Saudi Arabia:

Evolution since our 2023 report



## Revisiting the Saudi Esports market

### Gaming and Esports in KSA



Since our 2023 report, the Saudi Esports market has undergone notable shifts in engagement levels and market dynamics, prompting a renewed look at the current consumer landscape.

This updated 2025 report delves deeper into the characteristics, preferences, engagement levels, consumption patterns, and spending habits of Esports fans and gamers in Saudi Arabia, comparing them with current global trends and the 2023 report. By uncovering the key drivers behind the growth of the past two years, we offer strategic insights to fuel future expansion.



## Survey sample characteristics

To capture an accurate picture of the state of the Esports audience in Saudi Arabia, we conducted a questionnaire with 1,000 participants from the country in 2024. The country-specific subsample has the following characteristics:

### Gender



### Generation<sup>1</sup>

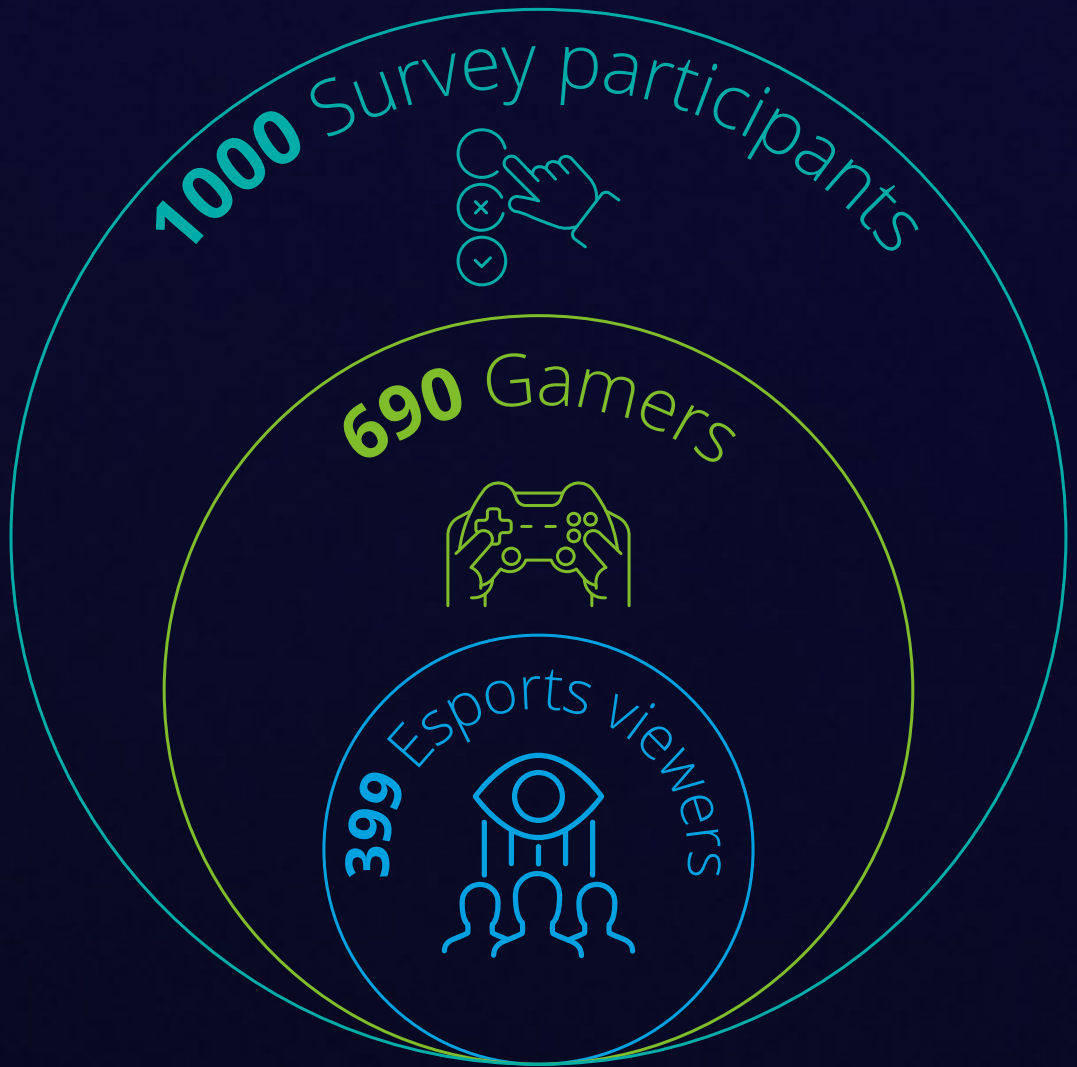


### City population<sup>2</sup>



Note: <sup>1</sup>Gen Z: 1996-2008, Millennials: 1981-1995, Gen X: 1966-1980, Baby Boomers: 1956-1965; <sup>2</sup>Large City: > 500,000 inhabitants, Small Town / Rural Area: ≤ 50,000 inhabitants  
 Source: Monitor Deloitte Analysis

 **Survey sample characteristics**



**Gen Z & Millennials**

=

**91%**  
Esports viewers

**50%**  
Esports viewers

come from

 **Large city**

**36%** Esports viewers

come from

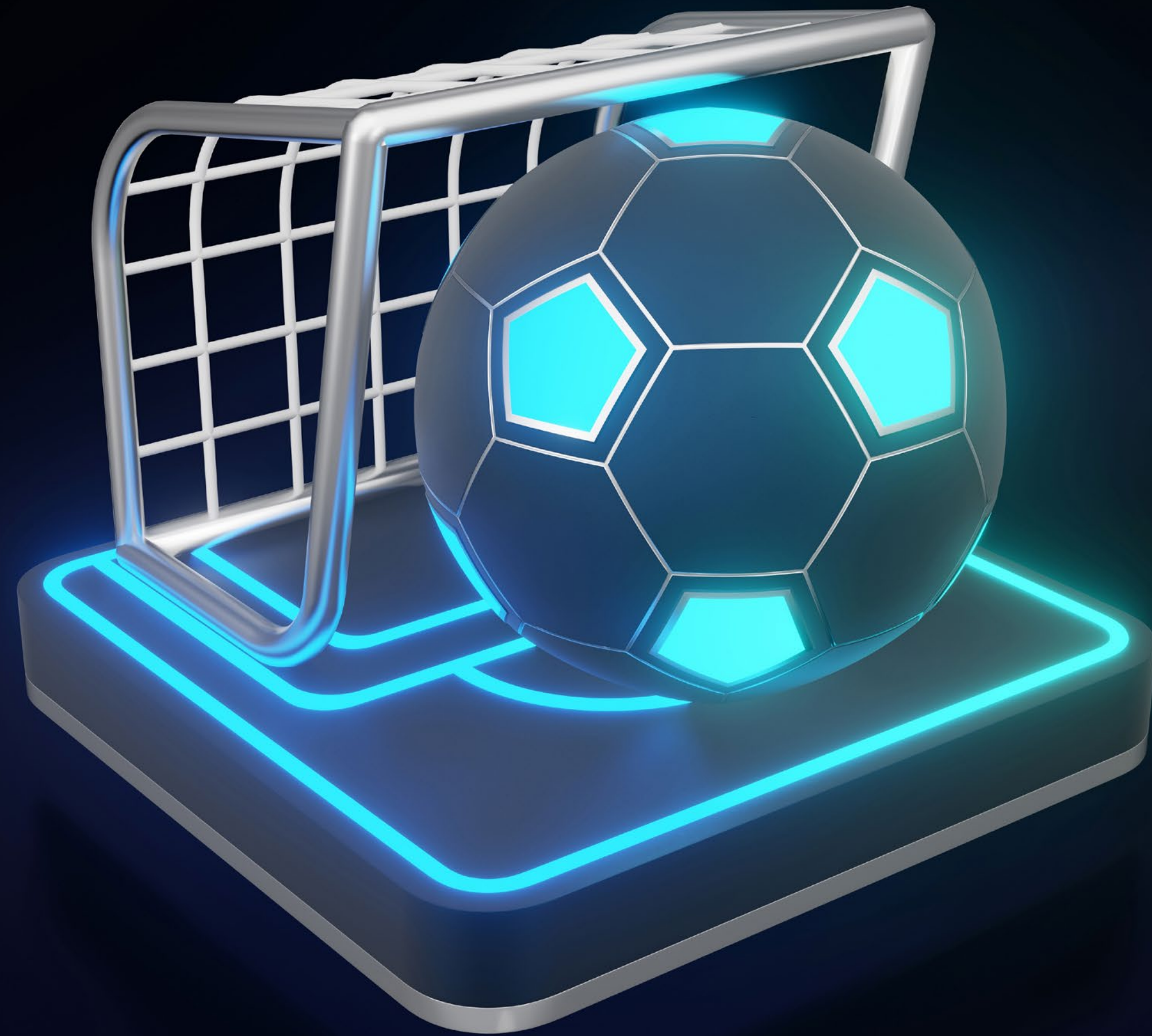
 **Small town / Rural area**

Note: Gen Z: 1996-2008, Millennials: 1981-1995, Gen X: 1966-1980, Baby Boomers: 1956-1965; Large City: > 500,000 inhabitants, Small Town / Rural Area: ≤ 50,000 inhabitants  
Source: Monitor Deloitte Analysis



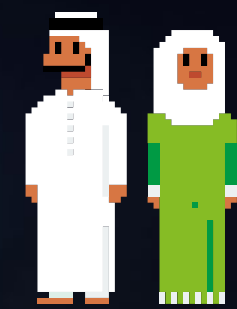
# Saudi Arabians demonstrate an active lifestyle

Fitness activities popular among Esports viewers



66%

engage in physical activity at least once a week, compared to 54% globally



of Saudi Arabians

85%

engage in fitness activities at least once a week; fitness activities include strength training, cardio exercises and fitness classes



Esports viewers



# Significant increase in Esports awareness and engagement:

+25% concept understanding, +30% reach, +53% Gamers and +85% Loyal Viewers since 2022



## Key factors capturing awareness and engagement



### Concept understanding

People who can correctly define the term "Esports" as "people competing against each other in video game tournaments or leagues"



### Reach

People who have watched Esports at least once in their lifetime



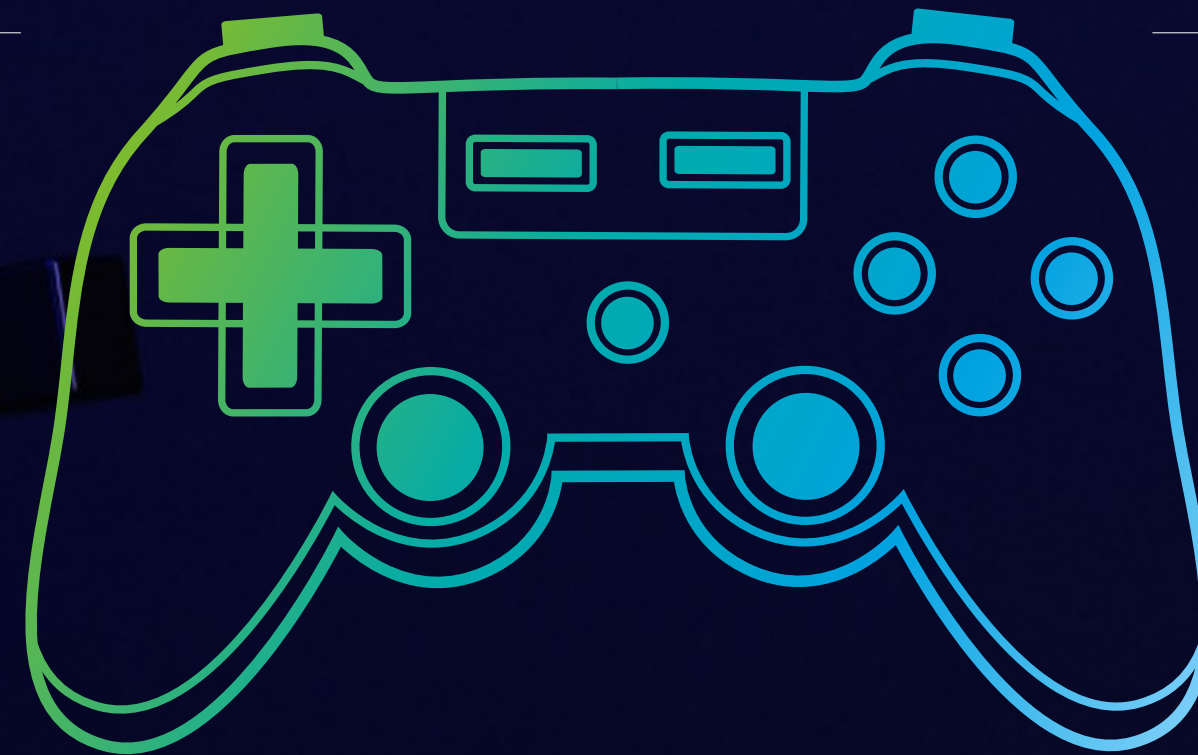
### Gamers

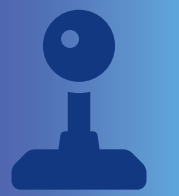
People who played video games at least once in the past 6 months



### Loyal Viewers

People who habitually watch Esports once or more per week on average





## Esports engagement metrics [% of participants]

+25%

24% 30%



Concept understanding

+30%

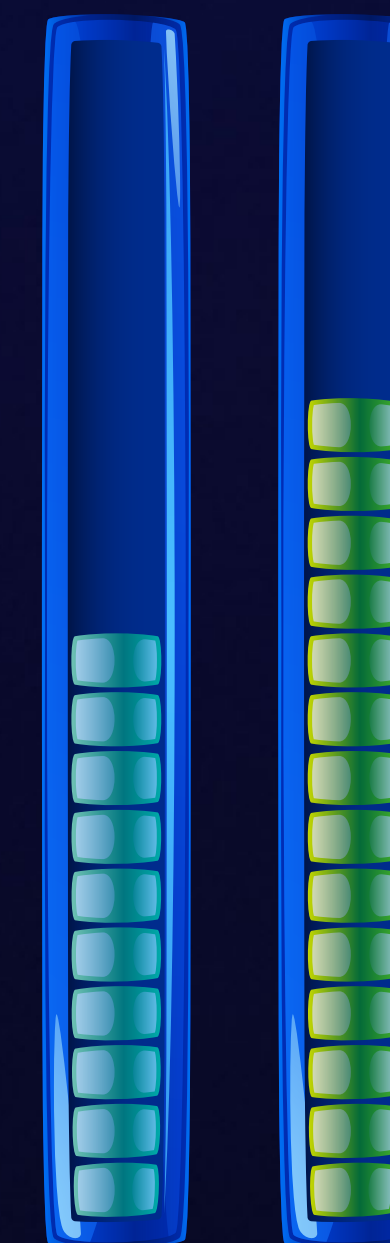
56% 73%



Reach

+53%

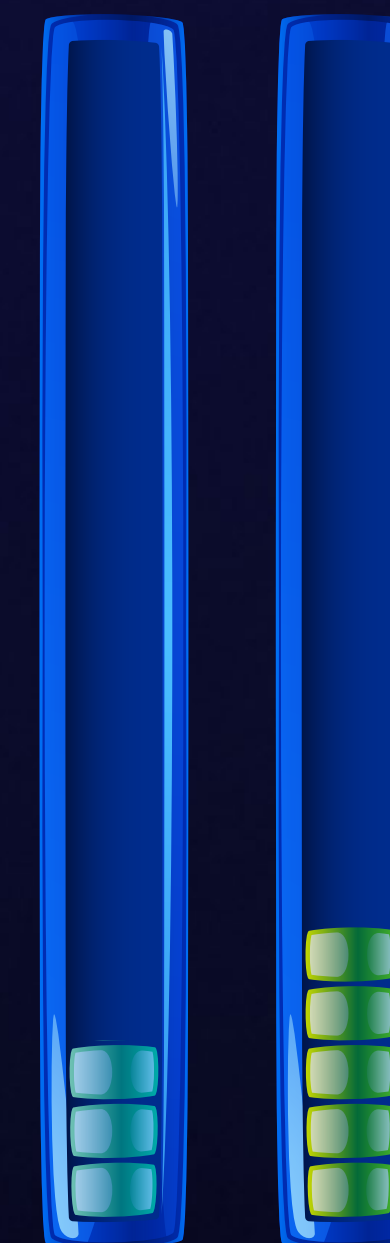
45% 69%



Gamers

+85%

14% 26%



Loyal Viewers

2022

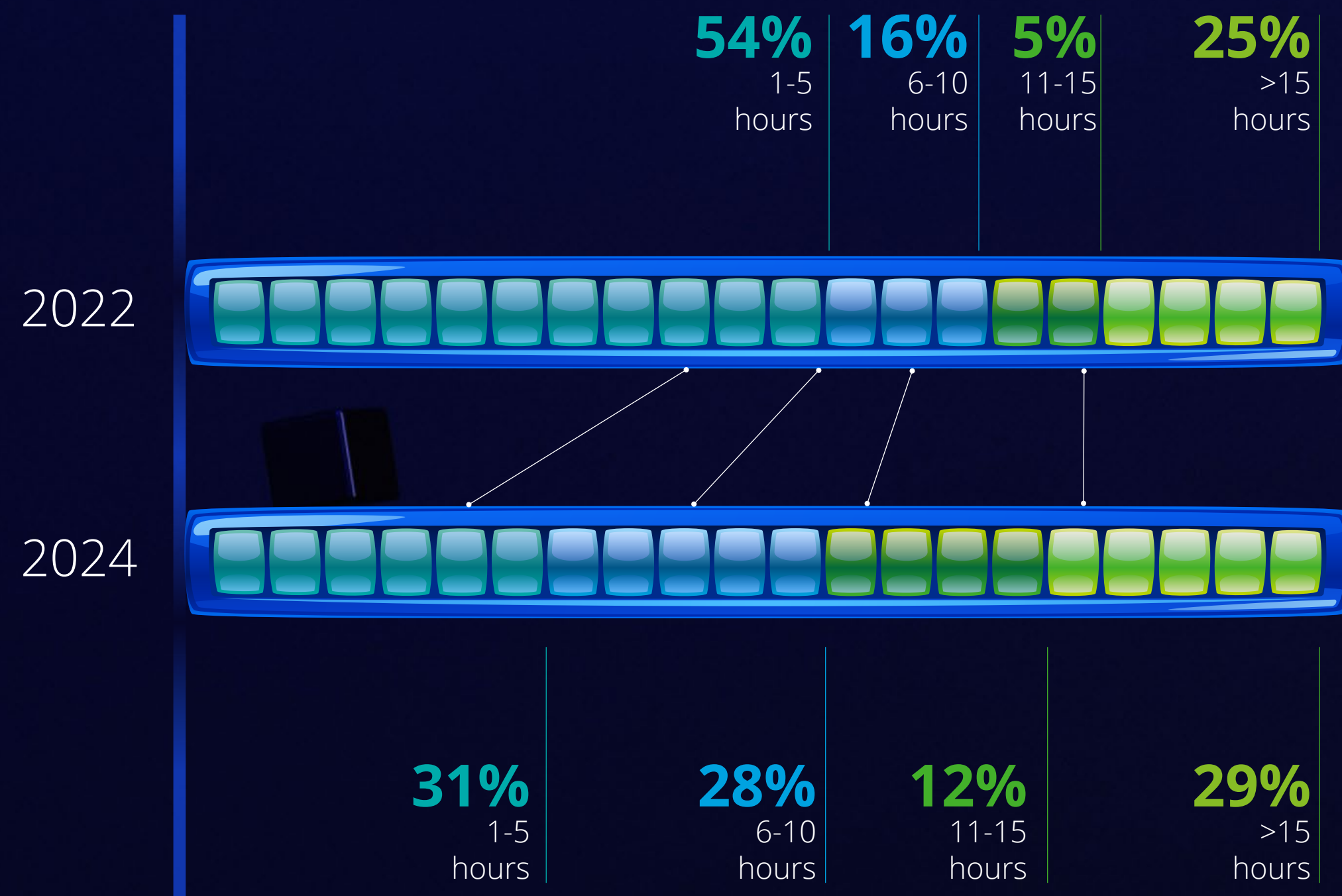
2024



# A larger audience with growing commitment

Loyal Viewers are watching longer and more frequently

## Loyal Viewers' watch time [avg. hours / week]



## Loyal Viewers' growth breakdown<sup>1</sup>

↑ 85%

Share of Loyal Viewers increased from 14% to 26% between 2022 and 2024, driven by ...

↑ 30%

... viewers who watch 1x / week on average going from 9% to 12%, and ...

↑ 197%

... the dedicated fans, who watch more than 1x / week on average going from 5% to 14%

Note: <sup>1</sup>Expressed as the percent change in the sample proportion between 2022 and 2024

Source: Monitor Deloitte Analysis

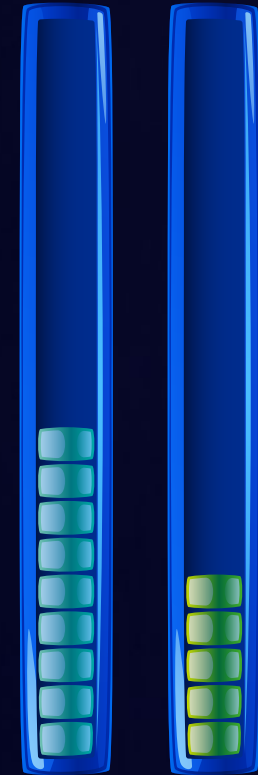


Viewership is driven by featured players and type of game, most popular viewing channels are YouTube Gaming and X



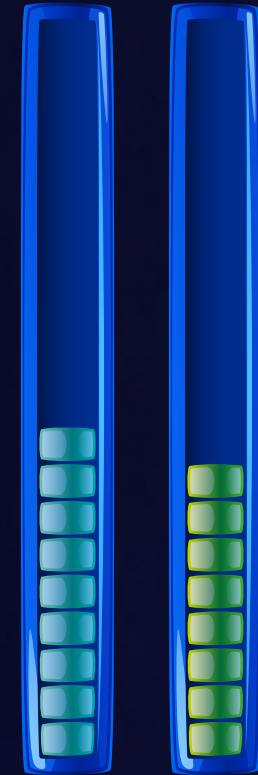
### Main drivers of Esports viewership<sup>1</sup> [% of Esports viewers]

41% 28%



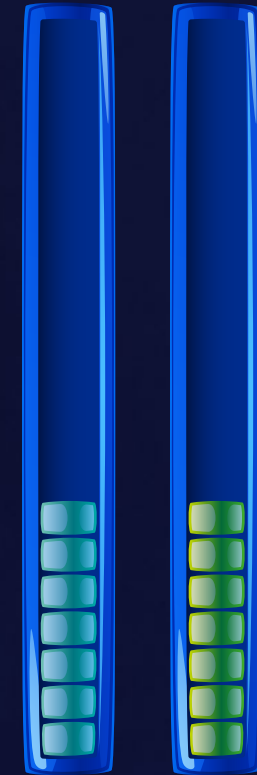
Featured players

41% 38%



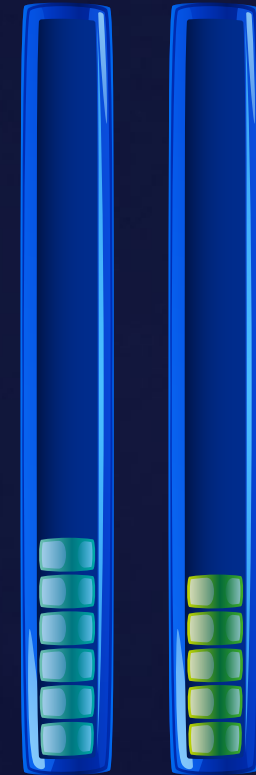
Video game

33% 33%



League /  
tournament

32% 28%



Featured teams

Recently, Saudis Esports players and teams have achieved success on the global stage – leading them to become national stars

KSA Global

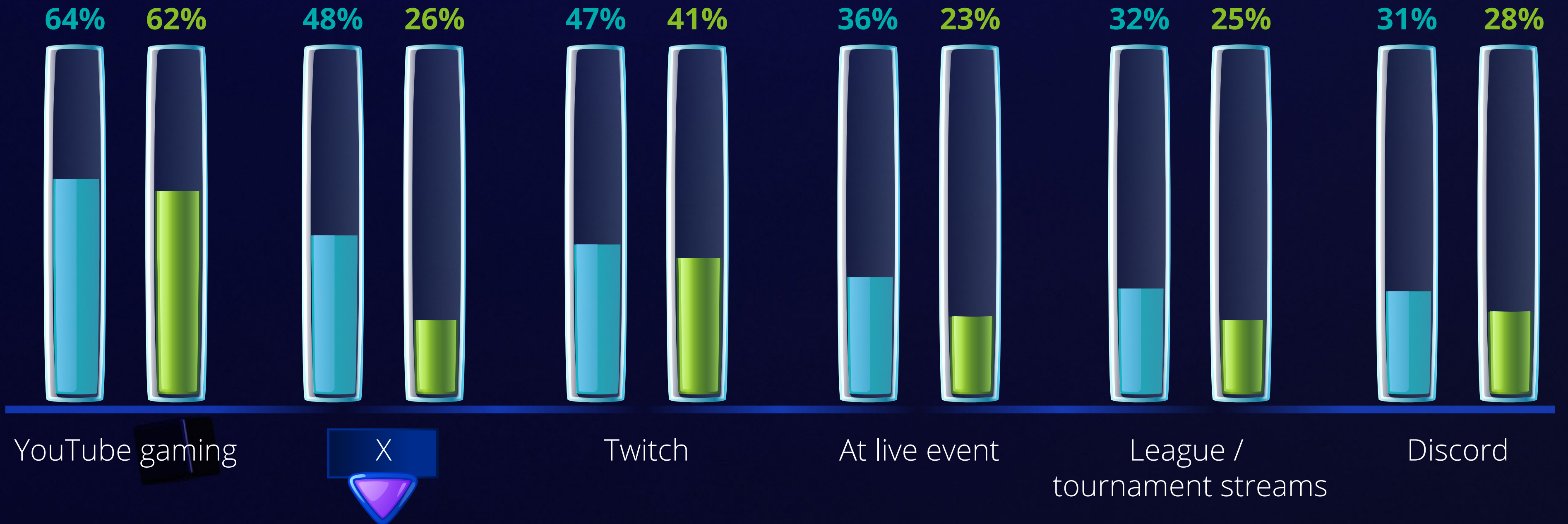
Note: <sup>1</sup>Esports viewers were asked to identify the most relevant factors on which their selection of Esports content depends  
Source: Monitor Deloitte Analysis; x.com; web.archive.org; X Create – Best Practice: Gaming content in the 'new normal'; Statista





## Top viewing channels [% of Esports viewers]

Classic streaming services have continued to grow in popularity among Esports viewers. To access Esports competition-related content, 64% used YouTube Gaming in 2024, up from 58% in 2022, and 47% used Twitch in 2024, compared to 43% in 2022



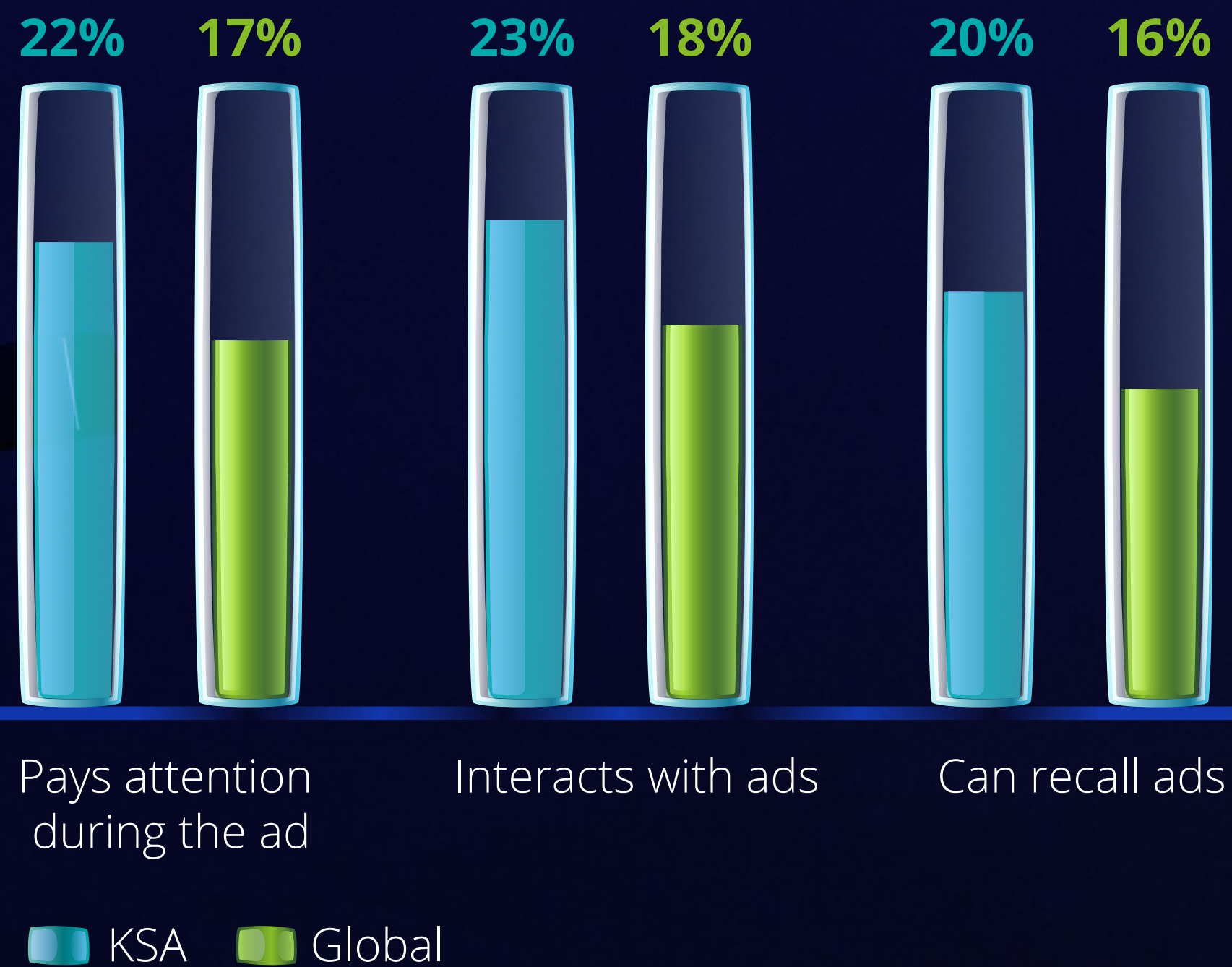
X implemented livestreaming capabilities mid 2024. Leagues and tournaments also routinely post brackets, highlights and showcases on X. Furthermore, Saudi Arabia is in the top 10 countries with most users on X

KSA Global



# Higher ad engagement and increased brand advertising influence on Esports content selection

## Ad interaction [% of Esports viewers]



## Brand influence

**76%** find advertising useful and informative, compared to 58% globally

**18%** find the sponsors and brands advertising important when picking Esports content, compared to 13% globally



# Higher propensity to spend on live streams, merchandise, attending live events and gaming products (1/2)


 **Esports viewers are more inclined to spend digitally and physically**

53% of Saudi Arabians report attending significantly more live events<sup>1</sup> compared to 42% globally, Esports viewers are also more likely to spend on Esports events<sup>2</sup>:

## Accessing Esports content:

**24%**  do not mind paying to access paywalled Esports content

*vs*

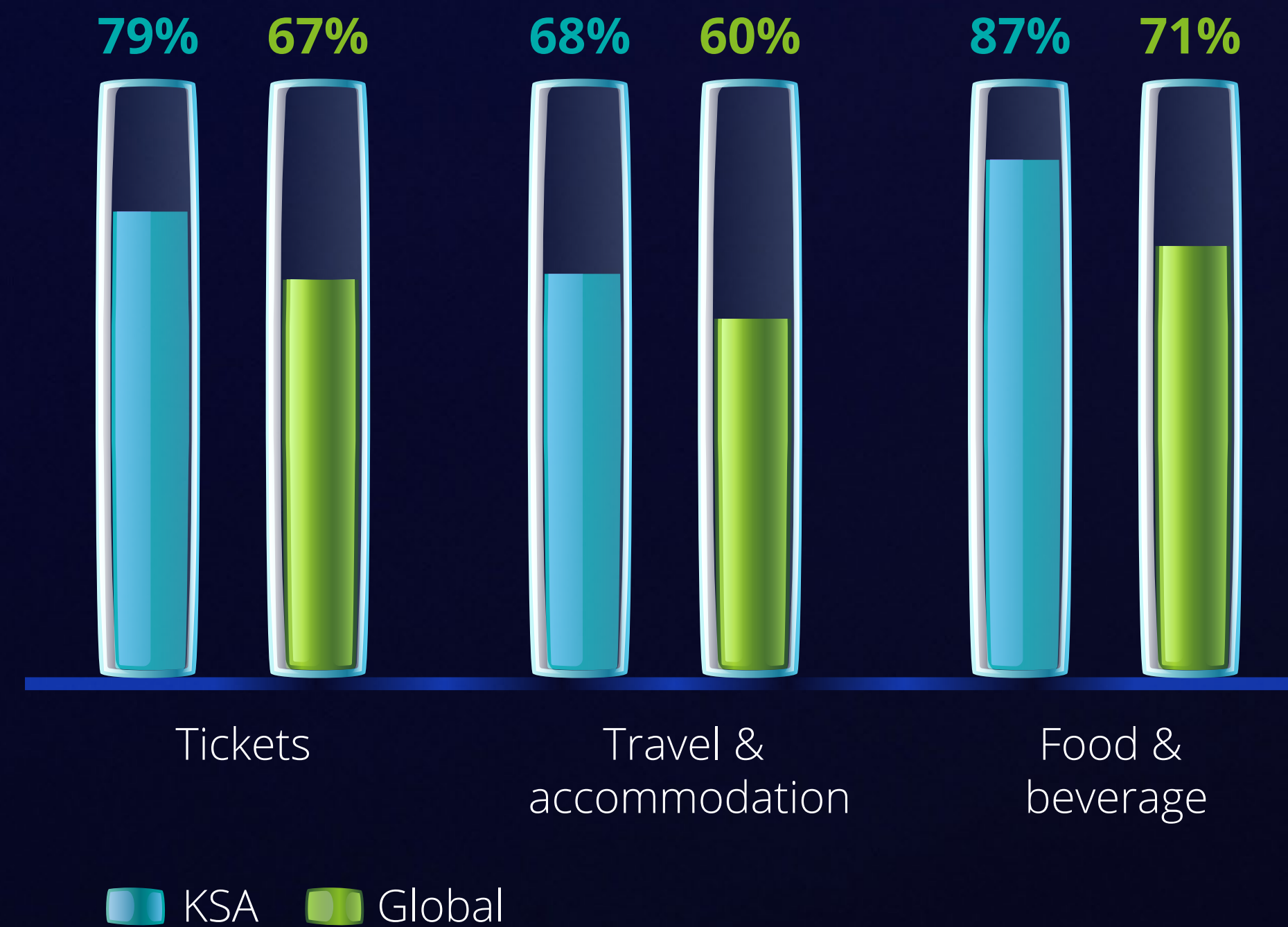
**18%**  globally 18% would not mind

## Esports-related merchandise:

**81%**  have bought Esports-related merchandise in the past 6 months

*vs*

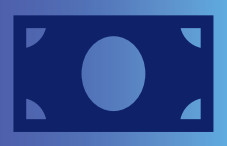
**71%**  globally

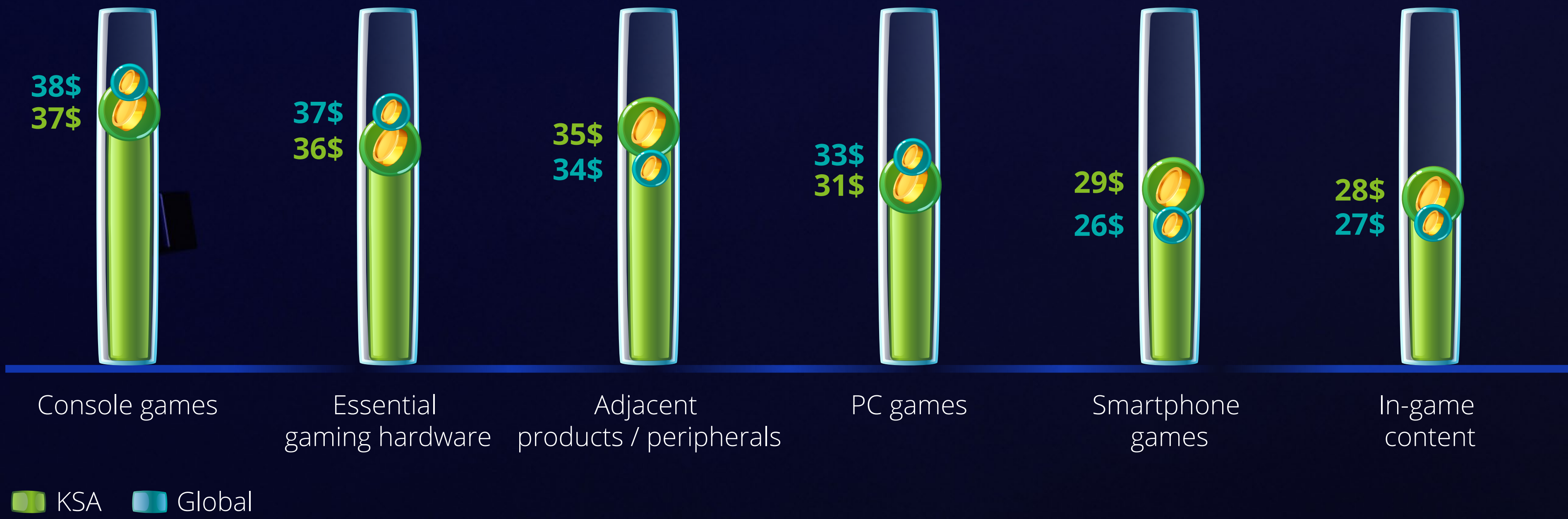


Note: <sup>1</sup>When comparing themselves to their social contacts (e.g., friends, family, colleagues); <sup>2</sup>Percentage of Esports Viewers that have spent money in the past 6 months – per category  
Source: Monitor Deloitte Analysis



# Higher propensity to spend on live streams, merchandise, attending live events and gaming products (2/2)

 Gamers' spending habits per category  
[avg. spend in past 6 months, USD]



Source: Monitor Deloitte Analysis



## % of Gamers spending more than \$50 per category<sup>1</sup>

KSA      Global



Console games

20%

*Vs*

19%



Essential  
gaming  
hardware

18%

*Vs*

16%



Adjacent  
products /  
peripherals

18%

*Vs*

14%

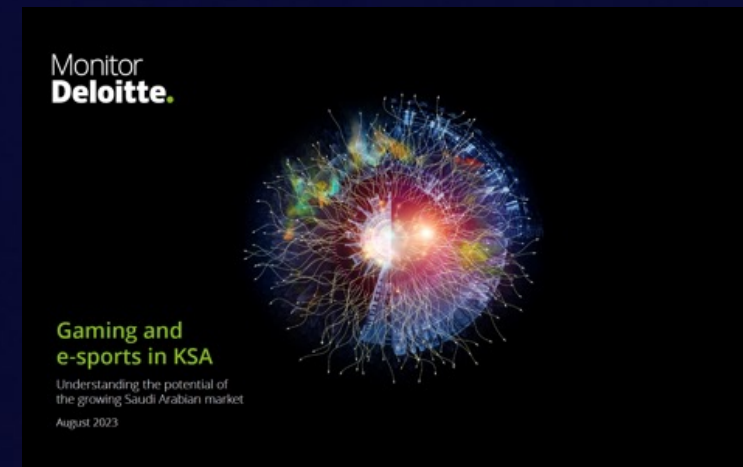


# Capture Saudi Arabia's Esports momentum by engaging the youth and gaining their loyalty

While Saudi Arabia is positioning itself as a Global Hub, as can be seen by its investments in both the Esports and Gaming sectors, two factors remain key:

- A young, digitally native, gaming-enthusiast generation is driving demand for Esports while also having a willingness to spend.
- Engagement is accelerating with a surge in Loyal Viewership – YouTube Gaming and X dominate, but untapped opportunities exist in localized content and community building.

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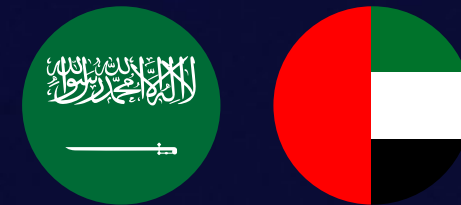
# Survey methodology

## Consumer survey

We conducted a representative survey among more than 14,000 participants globally on Esports and video gaming.

## 22 global markets

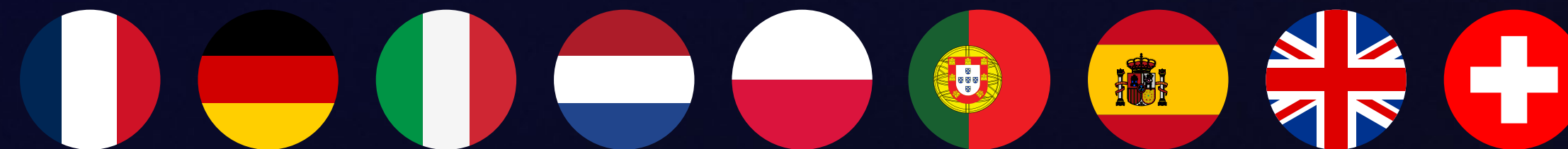
### Middle-East



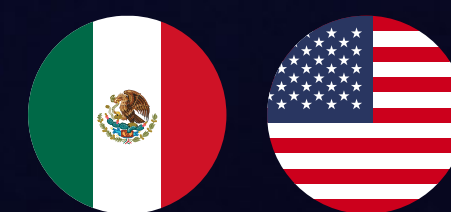
### Asia-Pacific



### Europe



### North-America





# Countries included in the consumer survey



Source: Monitor Deloitte Analysis



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