



The MENA Games Market: From Sand to Stardom

Next World Forum

Riyadh, KSA

August 30-31, 2023

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People are People

- Social interactions
- Teamwork
- Community building



\$1.8 billion

MENA-3 Games Revenue (2022)

67.4 million

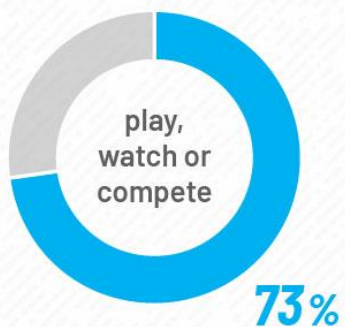
MENA-3 Gamers (2022)



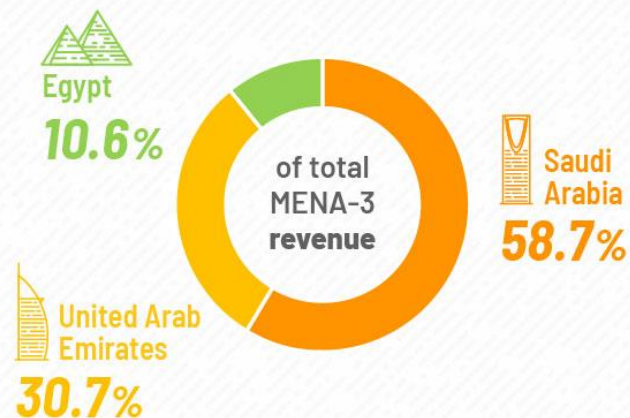
THE MENA-3 GAMES MARKET



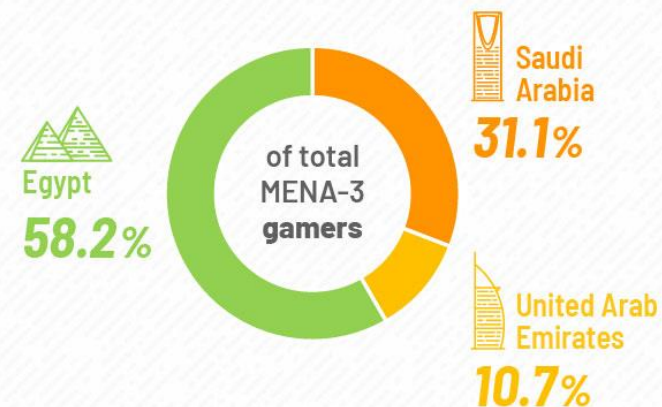
ENGAGE WITH ESPORTS



2022 REVENUE



2022 GAMERS



GAMERS



GAMES REVENUE



MENA-3: Saudi Arabia, United Arab Emirates, Egypt (2022 and 2026 data are estimates)
Games Revenue: Gamer spending on video games Mobile, PC and Console, excludes ad revenue
Gamers: An individual that has played on a PC, mobile or console for a minimum of 60 minutes in the past 30 days

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MENA-3 BY SEGMENT



GAMES REVENUE



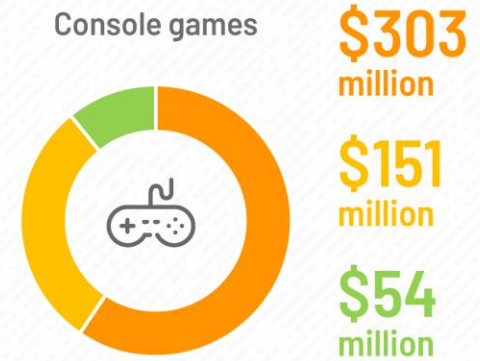
KSA



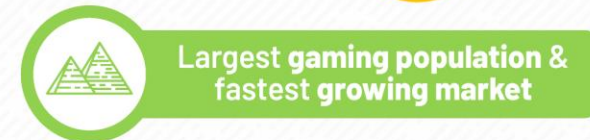
UAE



Egypt



GAMERS



Global Gaming in Numbers 2022



\$175.7 billion

Global games revenue

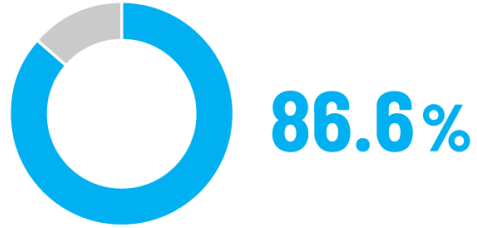


3 billion

Total gamers worldwide

MENA's Gaming Industry on the Rise.

Think Globally, Act Locally



of MENA gamers believe
Localization is important



Language most
important localization



Arabic localization
challenge



Preserving MENA
Culture & Values



Local workforce training
by foreign companies



Homegrown MENA
Games & Gamedevs

Increased Localization & Culturalization



9th Century Baghdad setting & Famous Actors as VO



Rashid (Street Fighter 6)



Valorant Anthem in Arabic



Poor localization on Hitman 3



Collaboration with Egyptian singer Mohamed Ramadan



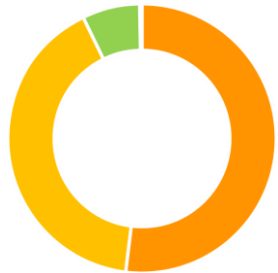
Battlefield 4's in game text isn't Arabic!

PUBG in MENA

Case Study in Successful Localization



Gross revenue



\$50.2
million

\$39.6
million

\$6.8
million



Downloads



2.1
million

0.7
million

5.3
million



KSA



UAE



Egypt

PLAYERUNKNOWN'S
BATTLEGROUNDS
MOBILE

NIKO



Most popular mobile game by revenue (2022 & H1 2023)



Collaboration with MENA celebrities & entertainment platforms



PUBG is also the most popular PC game

Public Sector Investment & Government Support



Investment



Strategic Growth



\$37.8 billion



Gaming companies
250



number of esports athletes per capita
Top 3



home-grown games to become top 300
30+



esports event host country
#1

Building a Game Company Portfolio



Sixth largest M&A deal



High-profile portfolio



Esports in KSA and MENA 2022



31.2 million
esports viewers



\$48.9 million
esports revenue



73%
MENA gamers
engage with esports



\$500m
esports city
in Riyadh



\$15.9 million
combined prize pool of PC
esports tournament in MENA



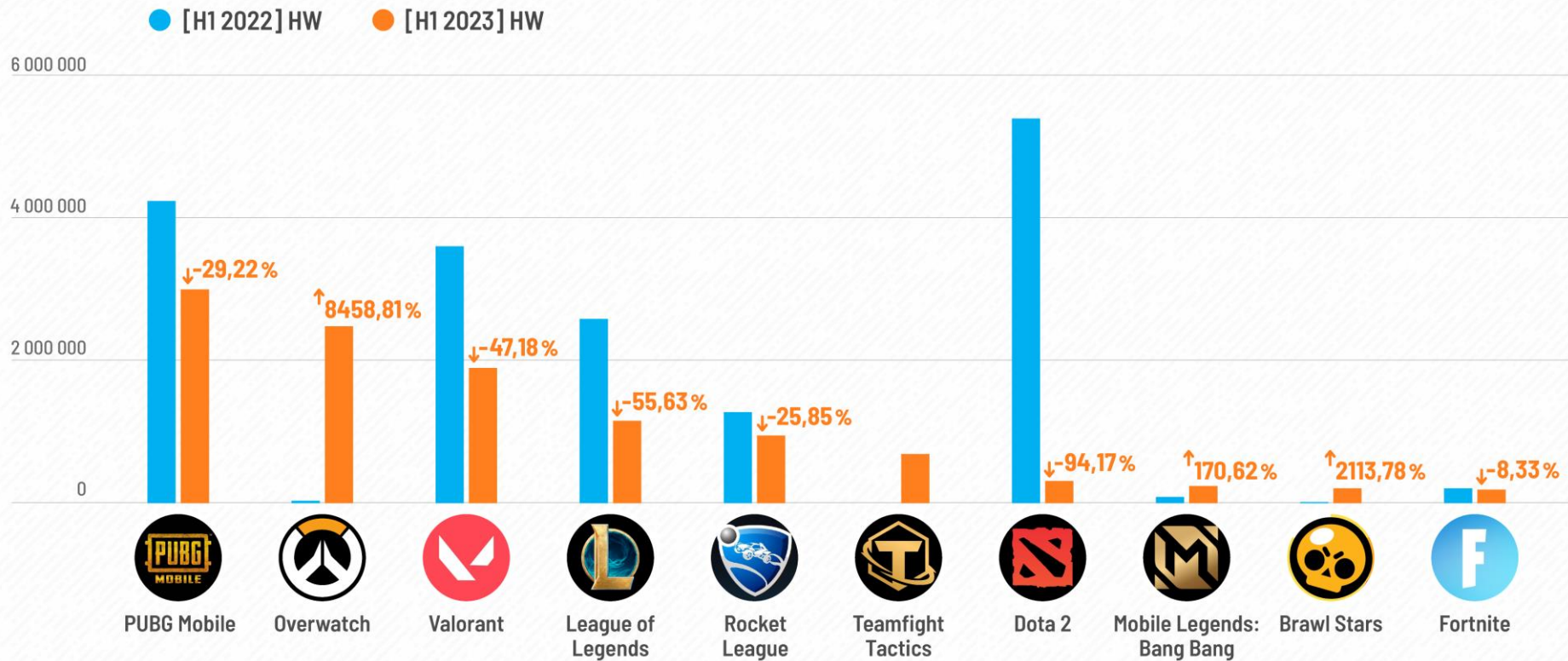
79.3%
total prize pool
across all platforms



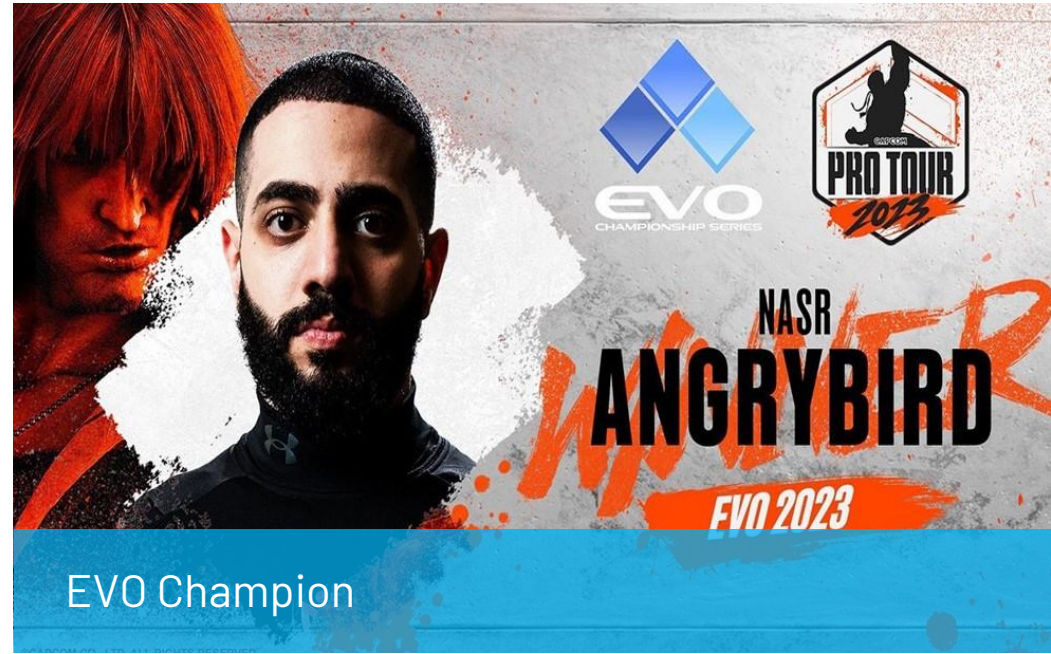
\$45 million
prize pool
(2023)

Esports Hours Watched

TOP-10 ESPORTS CATEGORIES IN MENA



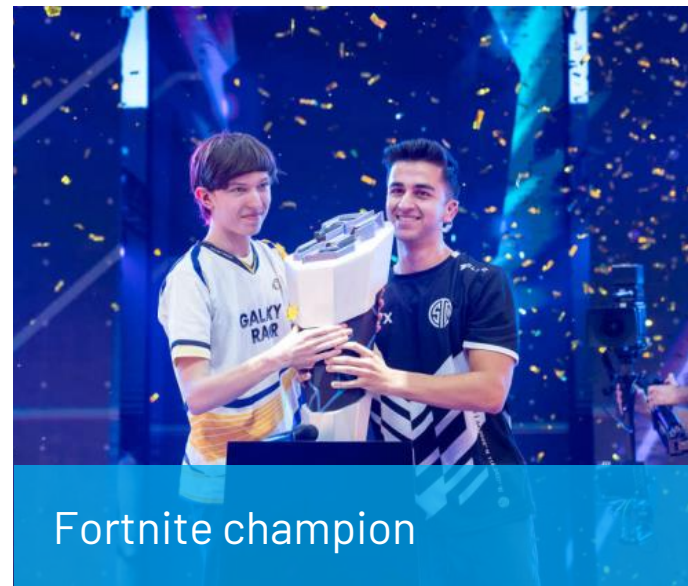
Rise of MENA Esports Stars



EVO Champion



Team Falcons successes



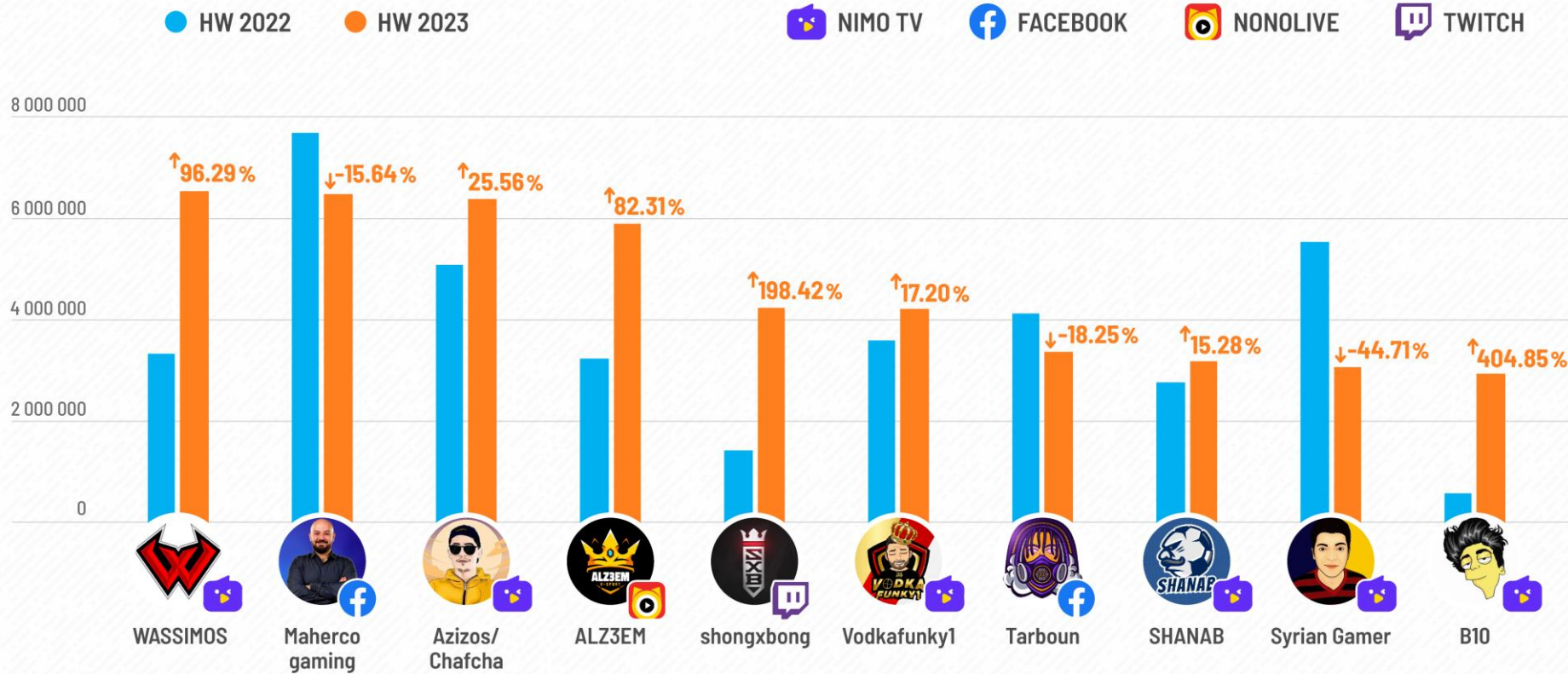
Fortnite champion



CS:GO WEC Entry

Rise of Arabic-Speaking Influencers & Streamers

TOP-10 ARABIC STREAMERS



Social Gaming in MENA



Pandemic led to rise of online social gaming

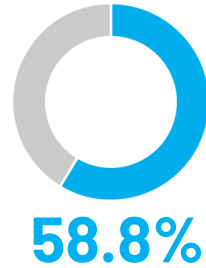


Gaming as socializing platform

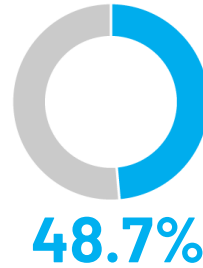


Internet cafes as socializing sites

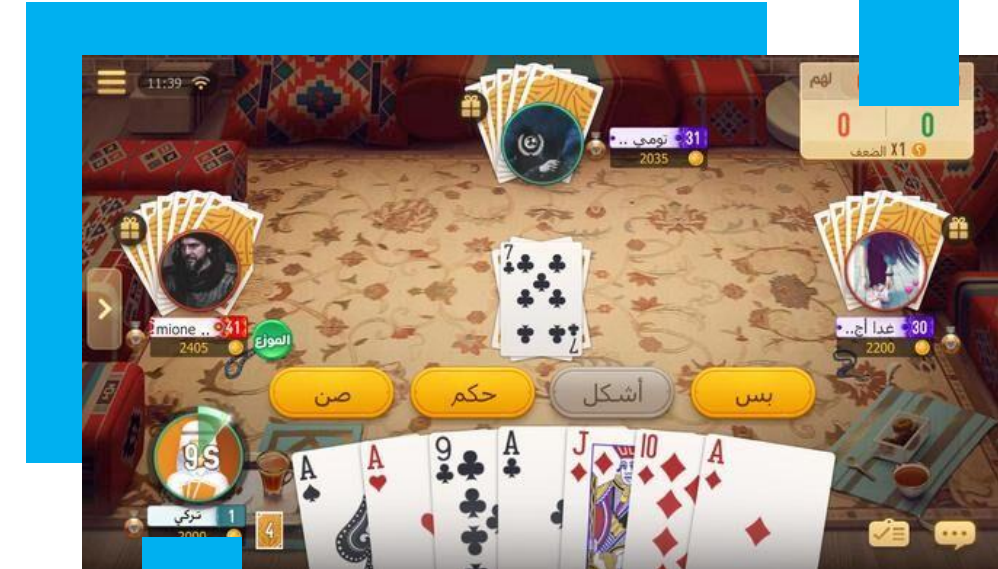
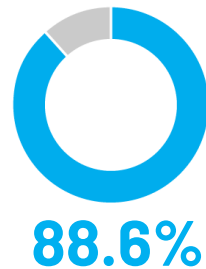
Gamers age 12-18



Gamers age 19-24



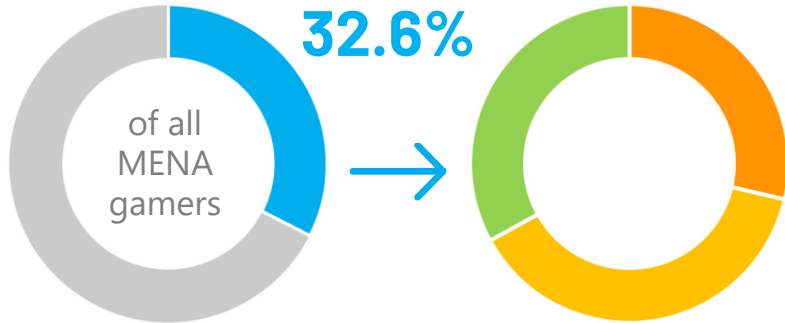
Voice chat used by gamers



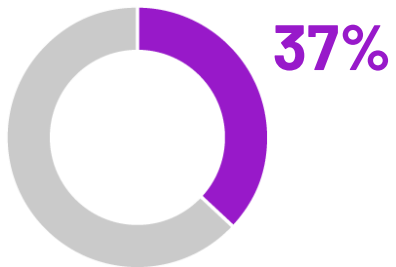
Female Gamers in KSA



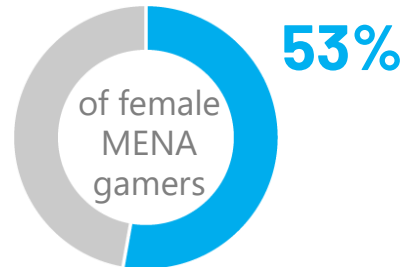
Female Gamers in MENA



In Asia incl. China



Use social media to get information on gaming



Events & Partnerships

Creating growth & safe space for women



Female game dev event



Women-only gaming lounge



Najd Fahd
First Saudi female to win FIFA 20



أكاديمية طويق
TUWAIQ ACADEMY

Female game dev academy



China's Market – A Benchmark



Mobile



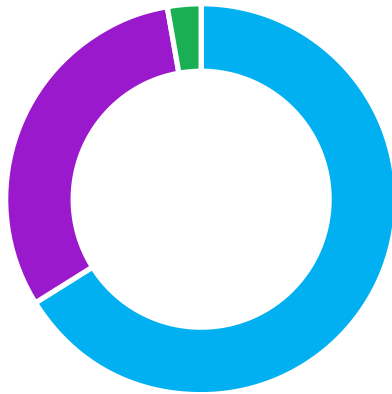
PC



Console



Games revenue



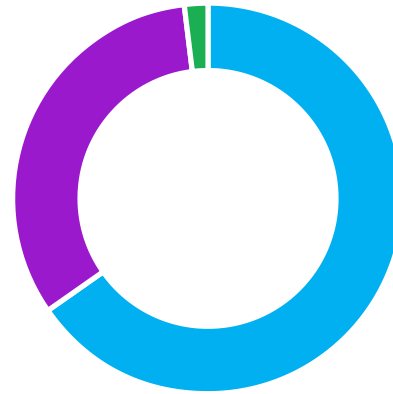
\$30.1 billion

\$14.2 billion

\$1.18 billion



Gamers



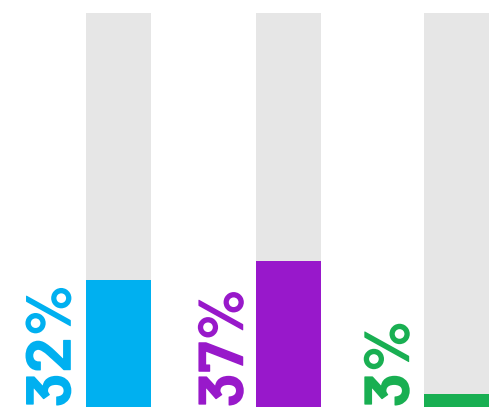
640.6 million

322 million

16.7 million



Of revenue worldwide



Gaming time limit on children



Official licenses by NPPA

Chinese Fans Go Wild For Esports Victories

- EDward Gaming won Worlds 2021 and it was as though every person in China was watching.
- This can be the path in KSA and other markets too.
- Fans drive engagement, engagement drives sponsors, sponsors drive sales, sales drive a game's longevity and esports spillover sectors.



Timeline of Chinese Games in MENA

2009



- ✓ Conquer came to MENA
- ✓ Most popular video game for many years.
- ✓ Still popular in Egypt:

YoY growth from Egypt



YoY growth in MENA in 2022*



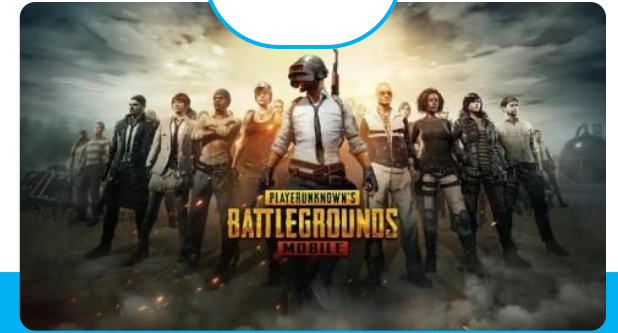
2015



- ✓ #1 on the top grossing in KSA, UAE, Kuwait
- ✓ ONEMT made it to the top 20 highest-earning Chinese companies from overseas markets

It became a successful case study for other Chinese companies looking to thrive in MENA

2018



- ✓ PUBG Mobile total revenue has surpassed Revenge of the Sultans
- ✓ More Chinese companies succeed in MENA



KSA - China relations



PIF's Investment in VSPN

MCIT-SAFCSIP partnership to grow domestic industry



Investment from Chinese companies

Tencent

ByteDance

IGG
I GOT GAMES

ONEIT

点触科技
DIANCHU TECHNOLOGY

Other Asian Markets to Follow

2022 Revenue and General Summary



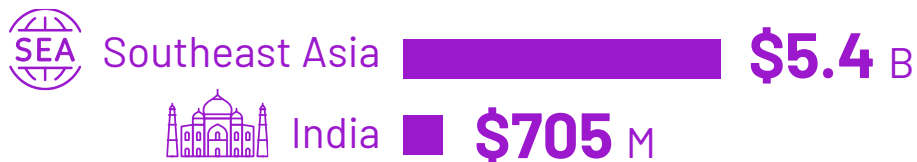
Mature Markets | Established Game Industry



- More diverse gaming platforms
- Stable regulations
- More older gamers



Emerging Market | Growing Game Industry



- Mobile game-first
- Regulatory changes
- More younger gamers

Talent will build the industry

Experienced
companies,
Incubators,
Education
Programs and
more



謝謝

감사합니다

ありがとうございます

Cảm ơn anh

ขอบคุณค่ะ

شكراً لكم

Cảm ơn anh

Salamat

Terima kasih

धन्यवाद।

Thank You

ありがとうございます

謝謝

ขอบคุณค่ะ

Salamat

धन्यवाद।

Terima kasih

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