



الهيئة العامة
لتنظيم الإعلام
GENERAL AUTHORITY
OF MEDIA REGULATION



Saudi Arabia Media Market Outlook:

Investment Opportunities in
2025 and Beyond

FOREWORD

In the midst of the Kingdom of Saudi Arabia's profound transformation, the media sector advances with unwavering confidence poised to take its rightful place as one of the key drivers of change and foundational pillars of the future.

What was once viewed merely as a channel for broadcasting news has evolved into a fully-fledged industry – an economic force, a cultural heavyweight and a strategic player in shaping the Kingdom's image both at home and abroad.

Under the banner of Saudi Vision 2030, and guided by an ambition that knows no retreat, the Kingdom is reshaping its media landscape through modernisation, empowerment and innovation. We are witnessing the emergence of a media ecosystem that not only keeps pace with the times but aspires to lead and define them.

This report does more than describe the current state of affairs. It captures the pulse of transformation with precise data and insightful analysis, spotlighting achievements to date and unveiling promising opportunities across five strategic domains shaping the future of Saudi media: visual media, audio media, publishing and digital content, gaming and e-sports, and advertising and marketing. These are not merely sectors – they are gateways to a thriving creative economy.

A noteworthy hallmark of the Saudi media ecosystem today is its foundation on deliberate regulatory reform, growing institutional integration and an enlightened partnership with the private sector. All within an environment increasingly attractive to investors and more reflective of the aspirations of Saudi citizens.

The General Authority of Media Regulation (Gmedia) exemplifies this enabling role – from enhancing classification and licensing tools to cultivating an investment-friendly ecosystem. It reflects a profound understanding that this sector requires intelligent governance, not bureaucracy; collaboration, not command.

The media sector in the Kingdom now represents a genuine opportunity – not only for those in pursuit of financial returns but for anyone eager to be part of an unprecedented transformation shaping the region.

This is an open – and strategic – call to all who belong to this sector, and all who aspire to enter it: become a partner in shaping the future, not just a recipient of it.

This report is designed to serve as a knowledge-based and strategic tool – empowering institutions and individuals in the media landscape to anticipate emerging opportunities and contribute to defining the sector's future trajectory on the road to 2030.



Salman bin Yousef Al-Dossary,
Minister of Media; and Chairman of
the Board of Directors, Gmedia

EXECUTIVE SUMMARY

Saudi Arabia's media sector continues to expand – supporting the priorities of the Kingdom's Vision 2030 development roadmap by facilitating local content creation, encouraging private investment and creating employment opportunities. The sector has evolved into a strategic pillar of the creative economy, combining economic diversification with cultural expression and digital transformation. As the sector grows, media is also becoming a platform for articulating national identity and elevating the Kingdom's cultural presence abroad. Strengthening creative capabilities and developing high-quality Saudi narratives is helping to project a modern and confident global image.

The sector's contribution to GDP is forecast to triple from SR16bn (\$4.3bn) in 2024 to SR47bn (\$12.5bn) by 2030, according to Gmedia projections – reflecting a compound annual growth rate (CAGR) of around 20%. This performance is set to be supported by digitalisation, new monetisation models and an expanding middle class with rising expectations for high-quality Arabic-language and locally produced content. The Kingdom's demographic profile is a notable advantage: with 71% of the population under 35 and among the world's highest rates of smartphone adoption, Saudi Arabia's audience is shaping demand patterns across video, audio, publishing and digital media, gaming and e-sports, and advertising and marketing.

Government funding has laid the foundation for this transformation. Initiatives backed by the Public Investment Fund (PIF) are advancing technology integration and infrastructure development, while targeted financing through the Cultural Development Fund (CDF), NEOM's production zones and the IGNITE programme continues to stimulate private participation. These initiatives form part of a coordinated approach that aims to crowd in private capital, localise production and scale creative industries in line with national diversification goals. Together, they are attracting domestic and foreign investors into segments such as film production, gaming and e-sports, advertising technology (ad-tech), streaming and immersive content.

The sector's regulatory evolution under Gmedia is designed to raise investor confidence. Efforts to simplify licensing procedures, strengthen intellectual property (IP) protection, and modernise frameworks for digital content and output generated by artificial intelligence (AI) support operational transparency and compliance. Recent and ongoing reforms, including the 2022 introduction of the Mawthooq permit and ongoing modernisation of the Audiovisual Media Regulation (AMR) as of 2025-26 help to create an increasingly structured and accountable environment for investors and creators.

By 2024 the Kingdom of Saudi Arabia (KSA) had already surpassed several Vision 2030 benchmarks related to the sector – including household entertainment spending and the number of cultural venues – highlighting tangible progress in institutional delivery, consumer

engagement and infrastructure rollout. Across media segments, growth trajectories diverge yet complement one another – contributing to a balanced and integrated ecosystem. Video and cinema expansion reflect robust audience appetite and fiscal incentives – including cash rebates up to 40% for filming – alongside an expanding portfolio of local productions gaining international recognition and augmenting KSA's position on the global stage.

The number of live music events increased sixfold from 2022-25, supported by flagship events such as Soundstorm and XP Music Futures, which are likewise bolstering Saudi Arabia's global media and entertainment profile. Meanwhile, publishing is adapting through translation initiatives and digital distribution, which extend access and visibility for local authors – with print-on-demand presenting an alternative distribution model. Advertising and marketing are increasingly data-driven, with digital channels expected to capture 90% of total ad spend in Saudi Arabia by 2029, signalling a shift towards analytics-based content monetisation. Together, AI and immersive technologies are shaping the next phase of digital transformation across KSA's media ecosystem. Gaming and e-sports remain among the Kingdom's most dynamic media growth engines, with the National Gaming and E-Sports Strategy (NGES) forecast to generate 39,000 jobs and unlock an economic contribution of over SR50bn (\$13.3bn) by 2030. Progress in 2025 included 350+ new film licenses, 4500+ attendees at the Saudi Media Forum, and the achievement of several Vision 2030 benchmarks related to the sector – including household spending and number of venues.

Nonetheless, several structural challenges persist. Content production capacity, shortages of specialised talent and limited studio infrastructure constrain domestic output. Meanwhile, efforts are ongoing to address regulation and monetisation inefficiencies. Addressing these constraints – particularly skills development, early-stage financing access and IP enforcement – will be crucial to unlocking the sector's full potential in the years from 2025.

Looking ahead, Saudi Arabia is poised to consolidate its position as a regional destination for media innovation and creative industries. The convergence of technology, public investment and entrepreneurial energy is giving rise to new opportunities across the value chain, such as content production, digital distribution, media technology, infrastructure and skills development. For investors, Saudi media presents an opportunity within a scaling market underpinned by strong demographics, regulatory development and institutional momentum. Early entrants can help to shape the ecosystem – capitalising on first-mover advantages while navigating operational and talent-related constraints – as Saudi Arabia's progress towards Vision 2030 continues to gather momentum.



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Introduction

As the Kingdom accelerates its transition from a resource-driven to knowledge-based economy, the media sector is emerging as a contributor to private sector growth and diversification. The sector aligns with Vision 2030 goals by driving local content creation, encouraging private investment and creating employment opportunities. Media is positioned to create new commercial value across production, content and distribution, and to support reputational capital and digital innovation as part of KSA's broader transformation.

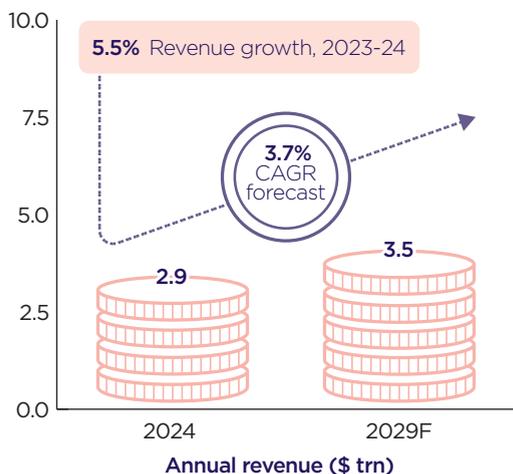
This report focuses on five strategic segments: video; audio; publishing and digital media; gaming and e-sports; and advertising and marketing. These align with the Kingdom's young population, rising digital adoption and government-backed investment in creative infrastructure. Together, they present an opportunity to boost GDP, attract domestic and international investment, expand employment and realise the commercial potential of local content.

KSA's media market is projected to register a 9% CAGR between 2025-30 – reaching a market size of SR41bn (\$11bn) – per Gmedia data. This is underpinned by demographic expansion, a technology-savvy population and targeted initiatives by stakeholders such as the Ministry of Media (MoM), PIF and Gmedia. The sector's direct GDP contribution is forecast to triple from 2022-30, with employment rising across production, marketing and creative services. However, structural challenges – such as fragmented regulation, early-stage funding gaps, skills shortages, IP enforcement and monetisation inefficiencies – need to be overcome to realise the sector's full potential.

KSA is set to outperform peers in media and entertainment growth

Global media and entertainment is forecast to register a 3.7% CAGR from 2024-29, driven by advertising spend, gaming and consumer anchors like live music and cinema. Saudi Arabia, with a projected 8.2% CAGR over the same period, is positioned among the fastest-growing G20 markets – outpacing established players such as the US, UK, Germany and Japan, as well as emerging markets like China, India and Mexico. This signals an investable opportunity in scalable content, infrastructure and technology.

Global media and entertainment snapshot



Global media and entertainment spending is poised for growth



Global advertising spend is projected to expand at **6.1%** for 2024-29, **triple** the pace of consumer spending (2%), with AI reshaping targeting and personalisation



Non-digital segments such as live music and cinema remain foundational, representing **61%** of global consumer spend in 2024



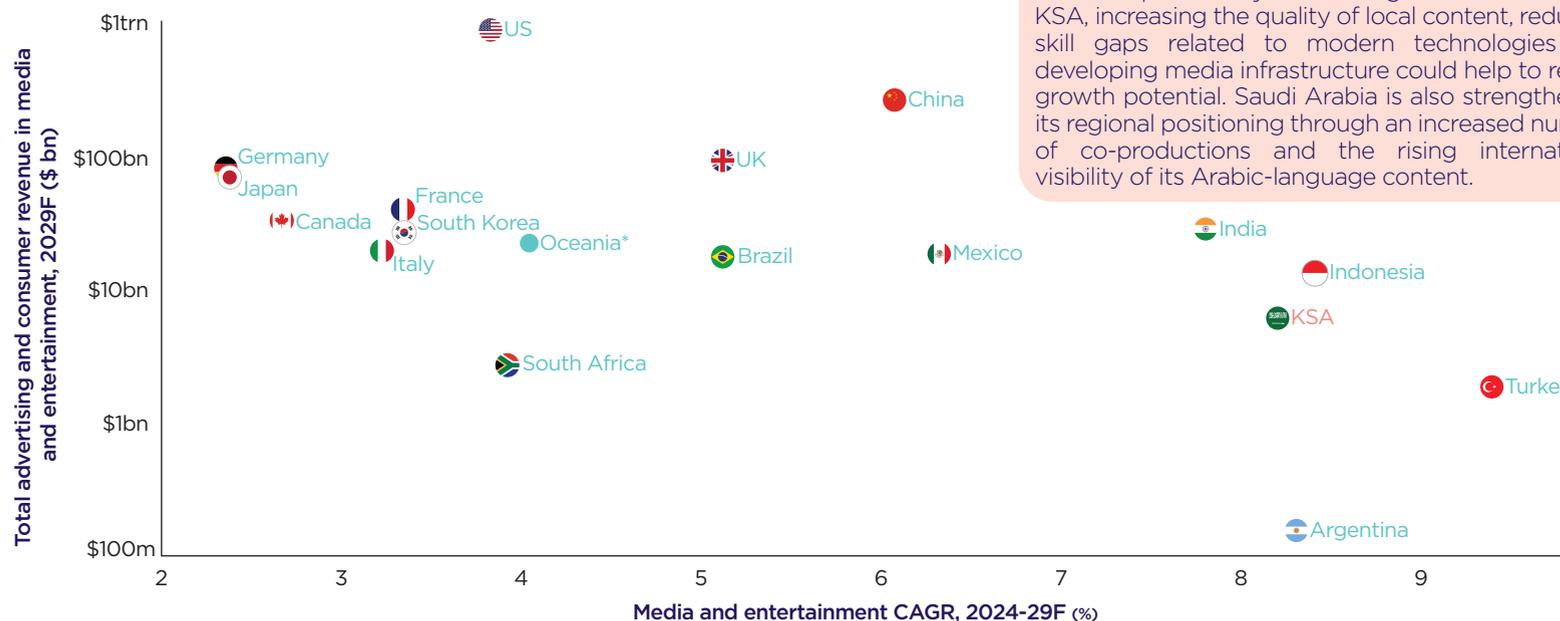
Global gaming revenue expected to rise from \$224bn in 2024 to **\$300bn** by 2029



While regulatory shifts and tariffs remain headwinds, structural and technological tailwinds are expected to sustain sector growth

KSA's media and entertainment growth is set to outpace much of the G20

Forecast media and entertainment expansion for selected G20 markets, 2024-29F*



A number of emerging G20 markets present higher growth forecasts for 2024-29 than mature markets. Expansion is primarily driven by gaming and digital media – particularly advertising and streaming. In KSA, increasing the quality of local content, reducing skill gaps related to modern technologies and developing media infrastructure could help to realise growth potential. Saudi Arabia is also strengthening its regional positioning through an increased number of co-productions and the rising international visibility of its Arabic-language content.

*Oceania used as a proxy for Australia; EU, African Union and Russia excluded from dataset



Media is a lever for socio-economic transformation aligned with Vision 2030

The Kingdom's Vision 2030 roadmap identifies the creative economy – including media – as a driver of economic diversification, cultural development and job creation

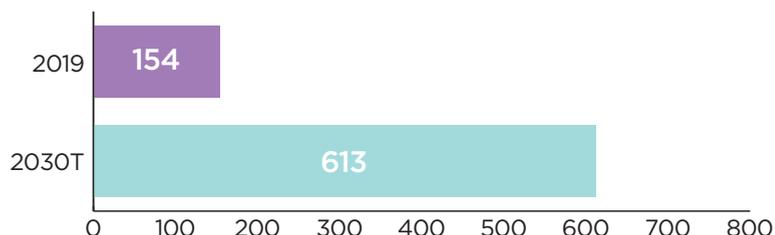
Launched in 2016, Vision 2030 provides a strategic framework to diversify the economy, modernise institutions through public-private collaboration and raise quality of life

The media sector supports this by expanding Arabic-language content, promoting digital transformation and strengthening talent pathways across the value chain

As Saudi stories and talent gain visibility across global platforms, media is also emerging as a tool for cultural diplomacy and a source of reputation capital

Media-related targets for 2030 include:

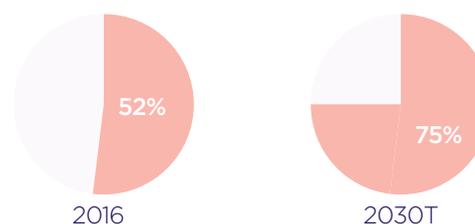
Grow the number of entertainment venues



Raise family spending on entertainment



Increase the share of local content in non-oil expenditure



Media directly supports three of KSA's 10 Vision Realisation Programmes (VRPs)



Quality of Life VRP

Strengthening the Kingdom's entertainment offering, reinforcing cultural identity and supporting social cohesion through community-oriented media



Human Capability Development VRP

Providing skills training for Saudi talent in areas such as animation, scriptwriting, game design and production management



National Transformation VRP

Supporting digital infrastructure and scalable media platforms that expand audience reach, enhance content distribution and unlock new channels for consumer engagement

The sector unlocks multiplier effects through employment and innovation



Vision 2030 as a catalyst

The media sector is positioned as a driver of diversification, cultural expression and quality of life. Saudi Arabia is strengthening its role as a regional destination by investing in digital infrastructure, expanding Arabic content and promoting heritage through film, music and publishing. These efforts elevate how Saudi heritage, values and contemporary creativity are represented globally.

Socio-economic footprint

Media is contributing to non-oil growth, with streaming, gaming and influencer marketing reshaping the ecosystem. With 71% of the population under 35 per GASTAT, demand for digital, culturally relevant content is set to rise. The industry also builds skills in production, design and digital engagement – critical for monetisation. Its GDP contribution is forecast to grow from **SR16bn** (\$4.3bn) in 2024 to **SR47bn** (\$12.5bn) by 2030, creating **150,000** jobs, according to Gmedia. The sector's multiplier effect extends beyond direct employment, supporting jobs in production, logistics, advertising and related creative services, while stimulating activity in complementary industries such as tourism and technology.

Institutional anchors

MoM sets national direction, while Gmedia regulates licensing, classification and content standards. Initiatives such as age-based ratings and the Mawthooq permit de-risk investment and streamline compliance. Ongoing reform of the AMR underscores KSA's commitment to a globally competitive media sector.

Challenges to 2030

Barriers include limited early-stage funding; a shortage of talent amid sector expansion; skills gaps in areas like visual effects (VFX); IP enforcement; regional disparity in infrastructure; and a deficit of high-quality local Arabic content. Monetisation is constrained by expectations of free content, while overlapping mandates can create uncertainty. Environmental sustainability practices such as green production remain nascent, with limited adoption of low-carbon or resource-efficient production models as of end-2025. Addressing these challenges will be critical to unlocking investment and capturing the full cultural and economic value of Saudi media.

Interview: Princess Lamia bint Majed Al Saud, CEO, Rotana Media Group



Princess Lamia
bint Majed Al Saud

In what key ways is Vision 2030 shaping the Kingdom's media sector?

AL SAUD: Vision 2030 has established new economic pillars including tourism, entertainment and culture – transforming media into a key driver of national growth and reputational capital. The sector supported around 67,000 jobs in 2024, with a GDP contribution target of 0.8% by 2030, around SR47bn (\$12.5bn), up from 0.6% in 2024. With 71% of the population under 35, a young, dynamic audience is shaping creative expression and digital consumption. As the Kingdom prepares to host global events in 2027, 2030 and 2034, investment in training, production and distribution is scaling to match Vision 2030's ambition of positioning Saudi Arabia as a regional media powerhouse.

What are the standout opportunities and gaps for investors?

AL SAUD: Several building blocks remain underdeveloped, including post-production capacity, props services and talent agencies. Closing these gaps represents a clear investment opportunity. Localisation is essential – not just in language, but also in storytelling, values and visual identity. Saudi content must feel authentically rooted in local culture, while maintaining the universal appeal that resonates with international audiences. While the government welcomes collaboration, global partners are encouraged to invest on the ground.

How are shifts in consumption influencing media production?

AL SAUD: Talent development is becoming more practical, with collaboration between local institutions and international partners providing on-the-job training. Near-universal internet penetration and world-leading mobile download speeds, combined with an extensive catalogue of Arabic titles and cultural content, create strong potential to leverage data and artificial intelligence in a responsible manner.



KSA's young demographic, regulation and value chain expansion fuel media growth

Media sector growth trajectory

In 2024 the sector contributed SR16bn (\$4.3bn) to GDP, or **0.57%** of total output, according to Gmedia. KSA is the leading performer in the Middle East media and entertainment landscape, capturing an estimated **33.2%** of the regional market in 2024 per Market Data Forecast. Gmedia expects the contribution of Saudi media to rise to SR47bn (\$12.5bn) by 2030, equivalent to **0.81%** of GDP. With an average age of **26.6** years, KSA's young, tech-savvy population is fuelling demand for digital content and creating new roles in production, design and media entrepreneurship.

The sector's employment reached 67,000 in 2024, with a target of 150,000 jobs by 2030. According to Gmedia projections, medias direct, indirect and induced GDP contribution are all expected to more than **triple** during the period. The direct contribution represents the largest share of the sector's value-added, with this direct contribution expected to rise from **SR7bn** (\$1.9bn) in 2022 to **SR23bn** (\$6.1bn) by the end of the decade.

Current and targeted socio-economic contribution of Saudi media, 2024-30



Source: Deloitte; GASTAT; Gmedia; Market Data Forecast; OBG research

Interview: Mike Sneesby, CEO, MBC Group



Mike Sneesby

How does a young demographic facilitate media growth?

SNEESBY: The Kingdom has one of the youngest populations globally, with most people under 35. This creates a digitally native audience, driving demand for streaming and interactive platforms. Arabic content is a natural growth driver both in Saudi Arabia and globally. This demographic profile offers long-term opportunities as the demand for authentic, local-language content expands.

Which parts of the media value chain do you find present the strongest opportunities for investors?

SNEESBY: Opportunities exist across the entire production cycle – from scriptwriting and creative development to studios, infrastructure and distribution. As more facilities come online, capacity will grow, creating prospects for writers, producers, technicians and talent. Beyond television, gaming and e-sports are projected to become a significant contributor to GDP by 2030. Saudi Arabia is developing the region's first AAA gaming studio – in NEOM – to develop high-profile games, reflecting local demand and the potential for international reach.

In what ways is the regulatory environment supporting investor confidence in the media sector?

SNEESBY: Saudi Arabia has established a stable and internationally benchmarked regulatory framework. In recent years, improvements have also been made to anti-piracy measures, an effort that is supported by both regulation as well as technology. At the same time, engagement with regulators such as Gmedia is ensuring a level of transparency rarely seen in other markets. Together, these measures are helping to reinforce consumer and investor confidence that the Kingdom is committed to long-term, sustainable growth in the media sector.



Saudi media is creating economic value, driven by a digital shift and global partnerships

Content and production partnerships



Partnerships across public, private and non-profit entities are strengthening Saudi Arabia's media ecosystem by supporting knowledge transfer, local capacity building and SME participation. Such collaboration helps to expand skills, diversify content development and align sector growth with Vision 2030 priorities.

In 2025 Netflix partnered with MBC Group to distribute Arabic-language productions globally via MBC Now and Shahid, expanding international access to Saudi-produced films and series

SRMG partnered with Warner Bros Discovery in 2022 to launch Asharq Discovery, a free Arabic-language platform focused on factual programming

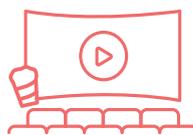
In 2022 MBC Group and the Saudi Film Commission signed an agreement to co-produce local videos and deliver training programmes for Saudi talent. MBC Group recorded over **SR2m** (\$543,000) in revenue in Q1, 2025.

PIF-backed Saudi Entertainment Ventures (SEVEN) is investing **SR50bn** (\$13bn) to build **21** entertainment destinations across **14** KSA cities. Its first project in Riyadh, valued at over **SR3bn** (\$800m), features global partnerships with Warner Bros Discovery and Hasbro, and is expected to attract 6m visitors annually.

NEOM and AIUla hosted **35+** major international productions during 2020-25. NEOM also supports co-production and on-site training to build local talent and capacity.

The reach and appeal of Saudi media continues to widen

Film milestones



In 2024 Norah became the first Saudi film selected for Cannes, securing international distribution. Red Sea International Film Festival showcased **125** films from **75** countries, including **30+** Saudi titles. Hobal drew strong domestic interest, selling **500,000+** tickets in early 2025.

E-sports and gaming



Gamers8 launched its Club Championship format in 2024 and attracted **500m+** global viewers. A **SR169m** (\$45m) prize pool and media rights deals with outlets such as Star Sports underscore the growing commercial appeal of KSA's e-sports ecosystem.

Production and content ecosystem



The sector benefits from regulatory reform and rising investment. However, talent shortages in VFX, dubbing and post-production persist, while **90%** of Arabic video content is still produced outside KSA. Nonetheless, the number of foreign media companies operating in KSA rose from **two** in 2024 to **17** in 2025.

Summary of project and partnership scale

Partnership or project	Scale or value
SEVEN entertainment destinations development	SR50bn investment across 14 destinations
NEOM and AIUla international productions	35+ productions hosted (2020-25)
MBC Group Saudi film projects	Contributed to SR2m company revenue for Q1, 2025
Gamers8 Club Championship	SR169m prize pool supporting global reach



Global events, infrastructure and partnerships underpin gaming and e-sports returns

Gaming and e-sports partnerships



Gamers8's E-sports World Cup featured a record **SR263m** (\$70m) prize pool in 2025, highlighting Saudi Arabia's growing influence in global competitive gaming

SEF signed memoranda of understanding with UK and Japanese e-sports federations in 2023 to support talent development and cross-border cooperation, including initiatives for grassroots training and professional growth

NEOM and MBC Group formed a joint venture in 2022 to establish the region's first AAA (high-budget) game development studio, with a focus on creating local IP and building technical capacity

Such initiatives can broaden community participation and strengthen creative education, thereby supporting wider social benefits beyond the competitive e-sports ecosystem

Nonetheless, sustainability challenges persist. Standout challenges include specialised talent availability and localisation capacity.

Interview: Ibraheem Altamimi, CEO, POWR



Ibraheem Altamimi

What role has Saudi Arabia played in shaping the e-sports landscape?

ALTAMIMI: The establishment of the Saudi E-Sports Federation in 2017 was a turning point for the industry. Since then, large-scale events such as Gamers8 have demonstrated both demand and engagement. The launch of the National Gaming and E-Sports Strategy in 2022 provided a roadmap, aligning the public and private sectors. More recently, the E-Sports World Cup in Riyadh in 2025 and the planned E-Sports Nations Cup in 2026 have further anchored Saudi Arabia's position as a global leader in competitive gaming.

How is investment in infrastructure supporting growth, and what areas remain underdeveloped?

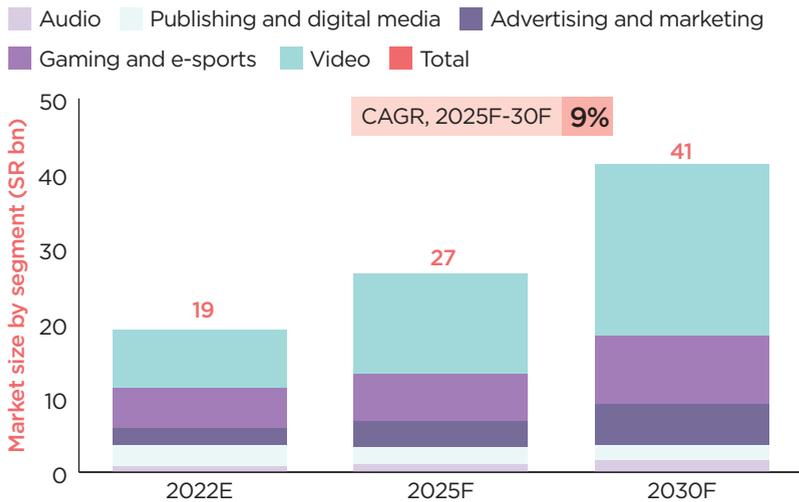
ALTAMIMI: Meeting the objectives of the national strategy depends on strong infrastructure. Savvy Games Group, backed by the Public Investment Fund, is investing in studios and facilities, while Qiddiya City is developing a dedicated gaming and e-sports district to host major events and attract communities. Alongside these initiatives, there is strong demand for content. Fans are seeking long-term storytelling through films and documentaries. However, Arabic-language production capacity and specialised talent are still limited. Addressing these gaps will be essential for long term sector sustainability.

Where do you identify standout potential for monetisation and investor participation?

ALTAMIMI: Sponsors are increasingly adopting data-driven strategies, focusing on deeper engagement with young audiences through integration with teams and players. This shift supports more authentic partnerships and helps build loyalty. On the investment side, the e-sports ecosystem in Saudi Arabia has already shown promising returns.

Different media segments present distinct investment opportunities in KSA

Video, gaming and e-sports, and advertising and marketing, are expected to drive growth, 2022E-30F



Regulators and public sector enablers

The MoM, Ministry of Culture (MoC), and the Communications, Space and Technology Commission (CST) oversee regulation and policy-making relevant to the sector. The Saudi Film Commission, Saudi E-Sports Federation (SEF), General Entertainment Authority (GEA) and Gmedia support licensing, implementation and sector development.

PIF fosters growth across the sector through strategic investment and infrastructure development - spurring local content development, innovation and competitiveness PIF-affiliated organisations include NEOM, MBC Group, Savvy Games Group and SRMG.

Gmedia's sector development strategy supports these national efforts by strengthening data quality, analytical insight and industry coordination. This helps public and private stakeholders translate sector growth into measurable economic, talent and cultural outcomes.

Investment appeal snapshot

Saudi Arabia accounts for almost **30%** of MENA's media market, according to Statista

The Kingdom offers film-related cash rebates through NEOM, AIUIa and Saudi Film Commission

KSA's cinema sector is projected to register a CAGR of **8.5%** from 2024-30, rising from **SR2.2bn** (\$584m) to **SR3.6bn** (\$960m)

The NGES targets **SR146bn** (\$39bn) of investment and **39,000** jobs by 2030

Production incentive comparison

The Saudi Film Incentive Programme requires a minimum local spend of **SR752,000** (\$200,000) for feature films and **SR188,000** (\$50,000) for documentaries or animation. In comparison, the UAE's 30-50% rebate scheme typically requires higher spending thresholds and media-zone registration, indicating a relatively accessible pathway for mid-scale productions in KSA.

Investment avenues for regional and international players

Strategic collaboration across production, infrastructure, talent development, finance and technology is generating avenues for participation and long-term growth

- ▷ Content co-development: Partner with Saudi entities to expand Arabic-language film, music and digital media production
- ▷ Infrastructure partnerships: Invest in studio, cinema and gaming facilities aligned with giga-projects
- ▷ Talent collaboration: Work with academic institutions and industry leaders to strengthen media education and professional training
- ▷ Capital investment: Provide tailored financing solutions to support content creation, distribution and emerging media ventures
- ▷ Innovation and technology: Collaborate on advanced digital and production technologies to serve the evolving landscape
- ▷ International media and entertainment events: Sponsorship revenue, media rights and visitor spending, which bolster the sector's potential return on investment



Building a transparent and investable media ecosystem

A modern regulatory environment is designed to help realise the sector's growth potential – providing the structural clarity and institutional confidence required to attract long-term investment and sustain the sector's role in national transformation. Furthermore, a series of regulatory measures from 2012-23 helped to establish a transparent and accountable ecosystem that supports content creation, market access and compliance. These include the 2017 lifting of a 35-year cinema ban, and the 2018 removal of audiovisual and media services from the list of activities exempted from foreign investment. Consequently, ongoing modernisation of the AMR underscores the commitment to promoting an efficient and predictable regulatory regime.

An important enabler in this transformation is Gmedia, which oversees licensing, content standards, operational integrity and employment practices. Its mandate is supported by a network of public institutions, including the MoM, as well as affiliated investment vehicles such as the PIF. While PIF involvement continues to drive large-scale projects, sustained ecosystem growth will depend on greater private capital participation and simplified regulatory procedures to avoid delays.

KSA's regulatory ecosystem offers improved clarity but remains exposed to timing and implementation risks, particularly for smaller entrants. New mechanisms – including co-investment models, slate financing and film production rebates of up to 40% – facilitate growth along the value chain. These developments underline the government's intent to position media as a competitive sector while balancing oversight with investor confidence and sector growth that supports national cultural ambitions.

ماذا تعني ضوابط المهن؟

هي جميع القواعد والتعليمات التي يجب ممارستها المهنية الإعلامية تجاه عملائها

ما الدليل من الدليل؟

الخدمة المتميزة في تنظيم المهنة

ما المهن التي يشملها؟

يقدم الدليل توصيفًا دقيقًا لمسؤوليات المهن التي ترخصها الهيئة العامة

ماذا يتضمن الدليل؟

يتضمن مجموعة من المبادئ العامة و

- ضوابط مزاولة
- ميثاق أخلاقيات
- المهن الإعلامية
- العمل الإعلامي



للمزيد عن دليل المهن الإعلامية

Media regulations are designed to safeguard and enable investment

Efforts are ongoing to transform KSA's media sector into a regional destination for business and capital allocation by establishing an investor-friendly regulatory ecosystem. The framework is anchored in national legislation, guided by Gmedia's oversight and aligned with goals to diversify the economy, increase private sector participation, generate employment and strengthen local content production.

Primary regulatory and compliance requirements

Content standards and cultural alignment

Content is mandated to reflect KSA's media policy – upholding Islamic values, public morals and national unity, and avoiding content that incites division or misinformation, or disrupts international relations

Market integrity and consumer protection

Regulations are designed to enforce fair competition, prohibit unlicensed advertising and safeguard consumer rights across all segments

Investment environment and operational transparency

Frameworks aim to offer clear pathways to entry, reduce regulatory ambiguity and support the creation of content that reflects national priorities – thereby supporting investor confidence



Licensing and authorisation

Entities engaged in broadcasting, rebroadcasting, production or distribution are required to obtain licences from Gmedia, in line with the authority's regulatory framework. Licensing processes have been digitalised, enabling faster approvals and greater transparency for investors.

Media conduct and professional responsibility

Regulations aim to uphold ethical conduct – including cultural and social norms – as well as protect workers and ensure that content meets standards tailored to each platform or medium

Regulatory oversight and accountability

Each segment is subject to ongoing monitoring, reporting and review by Gmedia – which is tasked with overseeing adherence to broadcast or publication norms. In addition, the Saudi Data and AI Authority (SDAIA) oversees the integration of AI across sectors, ensuring ethical standards and regulatory alignment.

Penalties and enforcement

A unified enforcement framework has been established to oversee compliance and promote regulatory accountability, with provisions for administrative sanctions, financial penalties or licence suspension in the event of violation. Penalties are enforced directly by Gmedia, with formal appeals available through the authority's dedicated Appeals Committee.

Comparison of Saudi and international media authorities

- KSA's Gmedia operates under direct government oversight – regulating, licensing and overseeing audiovisual, print and digital media to ensure compliance with national standards and policies
- Regulatory reforms have streamlined licensing and reduced approval times, creating a more transparent and investor-friendly environment
- In contrast, peer regulators – such as the UK's Ofcom, Singapore's Infocomm Media Development Authority (IMDA) and the US Federal Communications Commission (FCC) – are independent statutory bodies with stronger enforcement powers and broader mandates covering competition, consumer protection and spectrum management



Tailored regulation and institutional oversight support sector competitiveness

Segment-specific regulatory frameworks facilitate growth and investment



Standout regulatory milestones

Key reforms introduced from 2012 have strengthened Saudi Arabia's regulatory framework, improving transparency and predictability for investors while supporting long-term sector growth

- September 2012

Establishment of mandate for General Commission for Audiovisual Media (GCAM; now Gmedia)

 - KSA's regulatory reforms have streamlined licensing and reduced approval times, creating a more transparent and investor-friendly environment
 - Issued by Council of Ministers (Resolution No. 332 dated 16/10/1433)
- December 2017

Introduction of the AMR

 - Aims to regulate and develop audiovisual media in Saudi Arabia, foster an investment-friendly ecosystem and align media content with national policies
 - Issued by Royal Court (Resolution No. M/33 dated 25/03/1439)
- October 2018

Sector opened to foreign investment

 - Removing audiovisual and media services from the list of activities exempted from foreign investment
 - Issued by the Saudi Arabian General Investment Authority (now the Ministry of Investment)
- November 2018

Launch of executive regulations

 - Clarify the AMR by providing operational guidelines, a licensing framework and a violations schedule - to foster stakeholder protection and an investment-friendly environment, as well as nurture sector growth
 - Issued by GCAM
- September 2023

Transition from GCAM to Gmedia

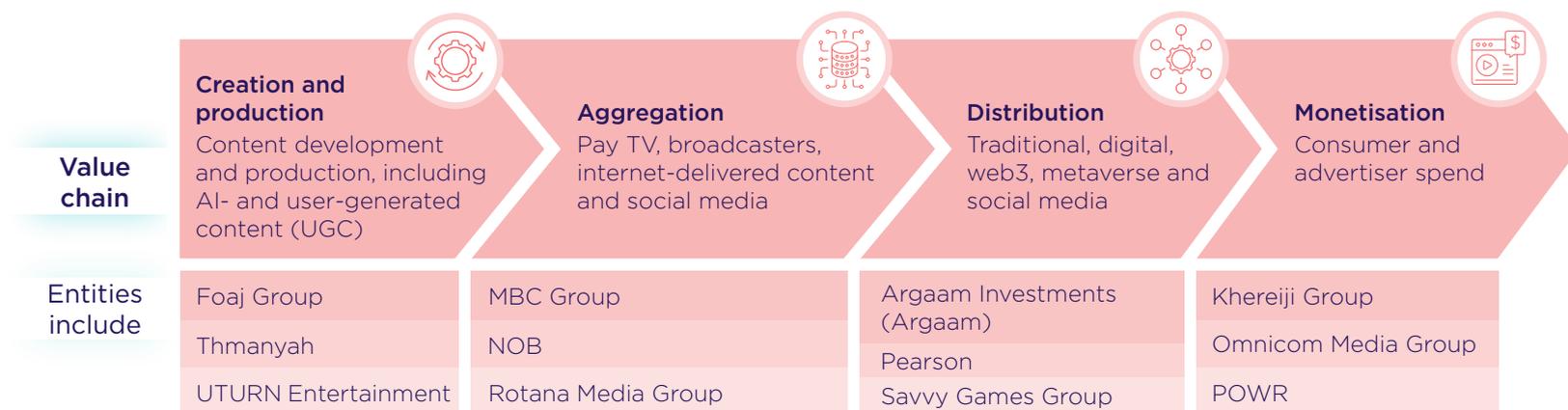
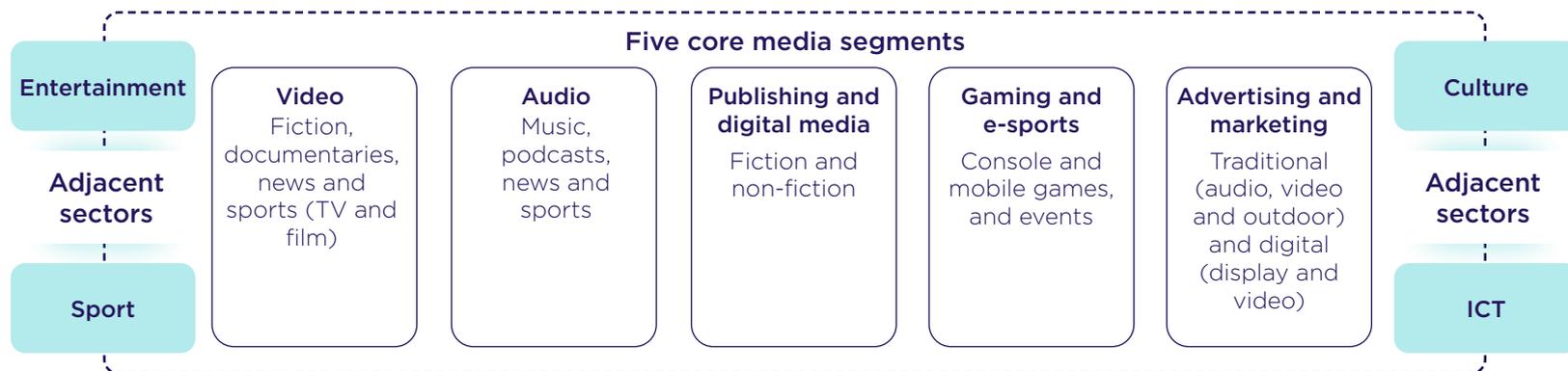
 - Creating Gmedia, expanding responsibilities to include policy development, and widening the authority's scope beyond audiovisual - to include the broader media sector
 - Issued by the Council of Ministers (Resolution No. 174 dated 27/2/1445)
- 2025-26**

Ongoing revamp of AMR

 - Modernisation of the AMR is under way as part of the broader Media Regulatory Framework project, aimed at building a transparent and comprehensive regulatory regime. Commercial registrations in KSA's arts and entertainment sector rose by 20% in 2024, indicating confidence in the sector.

The value chain generates revenue across content, distribution and monetisation

KSA's five media segments are evolving into investment-ready industries. Each benefits from targeted regulatory incentives, infrastructure upgrades and evolving consumer demand – presenting opportunities across the value chain. Nonetheless, strategic white spaces remain: monetisation platforms for local creators remain relatively underdeveloped, early-stage capital shortfalls persist; gaps in talent and the quality of locally produced Arabic content remain; and IP enforcement has room to strengthen. Enablers such as NEOM's production zones, SRMG Academy and the IGNITE initiative are tackling capability and infrastructure gaps. As integration advances – such as video streaming on gaming platforms – the private sector is positioned to unlock value and scale innovative delivery models. Inter-sector integration is accelerating, with gaming growth driving demand for advertising, streaming and video production, creating new synergies for investors.



KSA's integrated media value chain is transforming creativity into economic value, reinforcing its position as a key driver of non-oil growth



Alignment with best practices supports confidence in media investment

Gmedia's strategy for 2024-26 aims to align with global practices for regulation, talent development and compliance – based on international benchmarking. Strategic practices from global markets regarding sector development, regulation and compliance, as outlined below, can help to reduce revenue leakage, support innovation and guide sector growth. KSA's strategic approach increasingly combines international benchmarking with local needs, positioning Saudi media as a structured investment opportunity. PIF-backed investment and SME participation are expected to support sector growth.

The comparison below highlights how KSA's media regulation aligns with international best practices, showcasing similarities and distinctions across key areas such as digital transformation, IP enforcement and sector modernisation.

 KSA	Digital transformation Gmedia's strategy for 2024-26 includes a full digital transformation roadmap and capacity-building initiatives. Key priorities include enterprise resource planning modernisation, internal system digitisation, AI-powered content monitoring and e-services	IP enforcement Gmedia collaborates with SAIP to strengthen IP protection and implementation across the media sector. Joint efforts include the development of takedown mechanisms , anti-piracy efforts and content monetisation regulations .	Sector modernisation Ongoing overhaul of the AMR, streamlining licensing, local content quotas and creation of media special economic zones . Mandate expanded to include orchestration and enablement.
 Singapore	IMDA adheres to a Smart Nation strategy: extensive digitisation, AI-driven tools for tracking and moderating media, content classification platforms and digital licensing	Through the IP Office of Singapore, Singapore enforces strong IP protections . Licensing includes licensing fees linked to company revenue and content ratings compliance .	Sector supported by extracurricular media education, grants and self-regulatory principles; infrastructure and content investment prioritised
 UK	Ofcom supports digital transformation through media diversity frameworks, self-regulation , spectrum auctions, and co- and self-regulation models	Digital Economy Act mandates online platforms to protect IP . Ofcom enforces copyright via content platforms and promotes legal streaming.	Ofcom guides the sector through plurality principles, open licensing and vocational education pipelines , supporting media zones and local content quotas .
 USA	The FCC promotes digital transformation via broadband access, 5G auctions and digital accessibility rules	US Patent and Trademark Office and the Digital Millennium Copyright Act govern IP enforcement. Platforms are obligated to remove infringing content ; enforcement is evolving to address challenges presented by AI-generated work.	The FCC oversees a deregulated environment where the market self-regulates under its supervision of competition, spectrum management and communications infrastructure. The focus remains on market competition, open internet and transparent fee structures .

 **Saudi Arabia** is in the process of **modernising** its regulatory framework through Gmedia's strategy for 2024-26


 The **UK** and **Singapore** apply a **combination** of self-regulation and government oversight, allowing for both flexibility and regulatory control

 The **US** relies primarily on a **market-led** approach, complemented by regulatory oversight to ensure fair access and consumer protection



A scalable investment frontier: private equity (PE) and venture capital (VC)

Financing competitive domestic media companies



- Saudi media presents emerging PE and VC growth potential, given the private sector's relative immaturity compared to more established global markets
- Opportunities exist across early- to mid-stage private credit and PE investment – offering bespoke, flexible financing to enhance business models, content creation and distribution, and expand participation along the value chain
- Media mergers and acquisitions support the Kingdom's objectives, such as the Quality of Life VRP and the National Culture Strategy, by helping Saudi firms scale, develop IP and bring locally rooted content to wider regional and global audiences. However, limited exit options and investor caution may temper near-term deal flow.
- Public VC activity is led by the Saudi VC Company and the National Development Fund (NDF), which operate through both fund investment and direct co-investment, linking public capital with private investors
- Private financial institutions play a complementary role to public mechanisms such as CDF by providing commercial lending, structured finance and advisory services that can support scaling and long-term sustainability across media enterprises

Ecosystem investment

- Saudi VC Company has invested **SR2.6bn** (\$700m) in early-stage start-ups, including in advertising and marketing, from 2018-21
- The IGNITE programme, launched at LEAP22, commits **SR4.1bn** (\$1.1bn) to expand Saudi Arabia's digital content market across gaming, film and advertising

KSA is appealing for PE and VC, yet sector activity is ascent, 2020-24

The number of PE deals in KSA expanded for three consecutive years, achieving a CAGR of **67%** between 2020-23

111 PE transactions in KSA, 2020-24

739 VC deals in KSA, 2020-24
Total VC funding in KSA equalled **SR2.8bn** (\$750m) in 2024, representing **31%** of the number of transactions in MENA

Media-specific VC/PE data remains limited; disclosed deals as of Q4, 2025 centre on gaming and digital content ventures

The appeal of Saudi media for international capital



- Reforms have enabled international funds to deploy diverse financing mechanisms – such as development funding, slate financing for multiple projects, interim gap financing and private credit (i.e., non-bank lending)– to support the scaling of emerging Saudi players
- Amid regional fundraising slowdowns, international investors can engage with Saudi Arabia's expanding media industry. Opportunities exist in early- to mid-stage production companies and game development studios with strong cash flow potential and IP value. Sector readiness remains uneven, with many firms still building governance and financial capacity.
- KSA offers a 40% cash rebate for local and international film producers, subject to minimum spending requirements and excluding publicly owned companies. This compares to a 30% cash rebate in the UAE, a 30% tax rebate in France, and a 25% cash rebate plus up to 80% tax relief in the UK

The launch of Saudi media VC initiatives in 2024 signals sector scalability



Gaming and e-sports

In March 2024 Saudi Arabia's NDF and Social Development Bank (SDB) launched two VC funds valuing **SR450m** (\$120m). The funds will focus on equity investment for gaming and e-sports development, and aim to act as incubators and accelerators.

Investor takeaway

Saudi media offers growing opportunities for PE and VC, although investors may need to account for early-stage funding gaps and limited exit options. The sector aligns with early-stage capital trends, offering scalable digital models, recurring monetisation potential and long-term upside for VC investors despite near-term maturity constraints.

Key risks relate to the concentration of revenue streams, competition from global digital platforms, the need for specialised local talent and sensitivity to regulatory adjustments that can affect project timelines. Nonetheless the scalability of digital content models, expanding demand for Arabic-language media and alignment with national innovation programmes reinforce the sector's appeal for early-stage and growth-focused investors.



KSA media: A market positioned for growth and monetisation

Cinema and gaming fuel sector expansion

Saudi Arabia's media and entertainment sector is expanding rapidly, albeit from a relatively low base. The sector's CAGR is projected at **8.2%** for 2024-29, compared to a global average of **3.7%**, according to PwC.

Streaming and gaming

Over-the-top (OTT) and streaming platforms continue to drive monetisation alongside cinema and gaming expansion. Gaming revenue per user is forecast to outpace several global benchmarks to 2027, underscoring KSA's growing position in digital entertainment. The sector's expansion supports Vision 2030 goals by driving non-oil GDP and creating employment across production, distribution and digital.

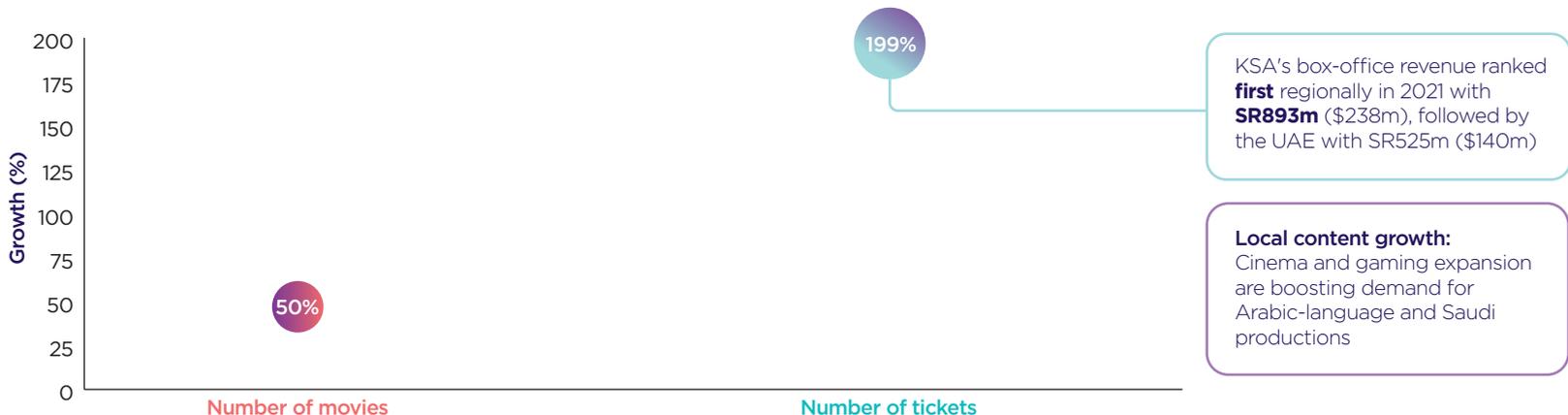
Cinema momentum

Ticket sales grew nearly **4x** faster than film releases during 2018-21, with growth rates of **199%** and **50%**, respectively, reflecting rising attendance per film. According to MoC, the Kingdom had **630** screens in 2024. This equates to a screen density of **1.8** per 100,000 people, signalling room for further infrastructure growth.

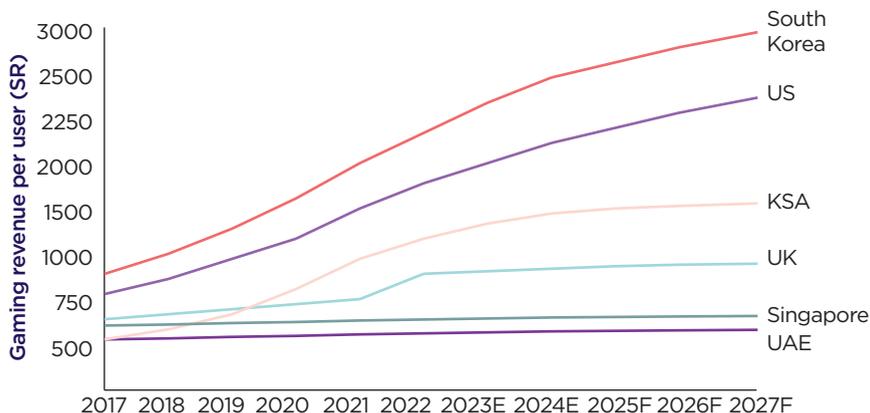
Challenges and opportunities

The sector faces ongoing issues such as piracy and uneven access across regions, alongside overreliance on blockbuster releases and affordability constraints. These dynamics highlight both the potential and the risks shaping content creation and digital engagement platforms. Continued investment in IP protection and affordable access models could help to mitigate piracy and pricing challenges.

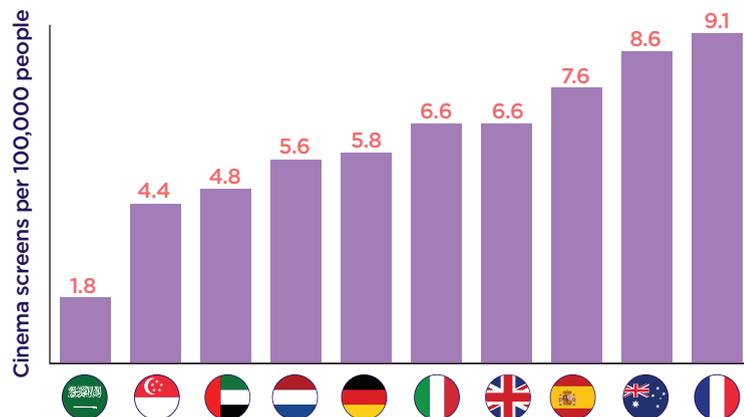
The number of tickets sold has doubled, reflecting rising interest and returns per film, 2018-21



KSA gaming revenue per user is competitive against international benchmarks, 2017-27F



A relatively low screen density signals substantial growth potential in the cinema segment, 2024



Streamlined licensing is designed to encourage investment and facilitate growth

Streamlined licensing reduces entry barriers, shortens project timelines and enhances regulatory predictability. Such measures can help to strengthen investor confidence and accelerate capital deployment, thereby contributing to investment activity in the sector. However, faster approvals may also reduce oversight, heightening the risk of compliance gaps and quality-control challenges if not matched by robust monitoring mechanisms.

Licensing approval time reduced by over 50% from 2019-21

Streamlined licensing is one of Gmedia's core strategic pillars, aimed at simplifying market entry and fostering investor confidence through a one-stop-shop regulatory approach



28,729

Licence applications processed (2018-25*)

19,787

Active licences as of July 2025

The number of professional registrations via Gmedia grew more than seven-fold, 2023-25



Investor journey: Streamlined media business setup

Institutional impact: Faster approvals and clearer licensing reinforce regulatory predictability, boosting investor confidence and operational transparency



*Data to October 2025





Established media segments are undergoing transformation

Saudi Arabia's media landscape spans both established segments - video, publishing and music - as well as emerging segments and activities such as gaming and e-sports, streaming and influencer marketing. These all contribute to a stronger creative identity and diversified economy. While mature sectors are integrating new delivery models to consolidate market share, emerging domains are outpacing legacy growth rates - reshaping consumption patterns and monetisation approaches.

Video, supported by production incentives and growing demand for OTT streaming platforms, is set for streaming to represent two-thirds of its value in 2025. Music is expanding through live events and digital platforms, while publishing diversifies via translation and e-formats. Gaming, forecast to register a 23% CAGR from 2024-27, and e-sports are scaling together through infrastructure investment and partnerships. Advertising and marketing are increasingly evolving via AI-enabled targeting and predictive analytics, reflecting ongoing trends rather than established outcomes. The creator economy expanded by 32% in the first quarter of 2025, according to Admitad and Stillr Network.

Nonetheless, gaps in skills, infrastructure, IP enforcement and early-stage capital access remain key constraints to realising the full potential of Saudi media.

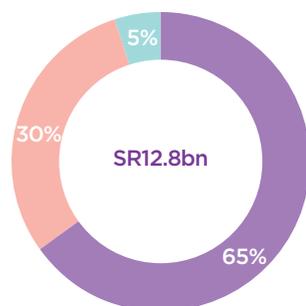
Driving video growth: cinema, demand and incentives

The transformation of Saudi Arabia's video segment underpins a wider shift in the Kingdom's creative economy. High connectivity, rapid digital adoption and strong consumer engagement are enabling local producers and global partners to expand on-demand content, strengthen data-driven programming and enhance competitiveness across regional and international markets.

Streaming accounts for around two-thirds of the video segment's value, 2025F

Share of market size by subsegment

● Video streaming ● Cinema
● TV



STARZPLAY

Popular OTT platforms in KSA include Shahid (MBC Group), UAE-headquartered Starzplay, Netflix and Amazon Prime Video

شاهد

Shahid holds a leading position in MENA video streaming, with a **25%** market share and over **4.5m** subscribers by early 2024, according to MBC Group

NETFLIX

Netflix partnered with Saudi production studio Telfaz11 at end-2020 to co-produce **eight** films

تلفاز 11
Telfaz11

Video-based OTT in KSA is expected to register a **10%** CAGR for 2023-27, according to Gmedia

OTT platforms



Cinema expansion



- Saudi cinema revenue reached **SR922.6m** (\$246m) in 2024, expanding over **20-fold** from **SR39m** (\$10.4m) in 2018 amid ongoing regulatory liberalisation and domestic demand growth, according to the Saudi Film Commission and Gmedia
- In the first half of 2025, box office revenue totalled **SR448m** (\$119m), with **9.1m** tickets sold and **635** screens across **65** cinemas in **20** cities, per a Saudi Film Commission 2025 report
- Ticket sales increased to **17.7m** in 2023, up from **14.4m** in 2022, while seating capacity surpassed **60,000** nationwide, based on data from MoC and Gmedia
- PIF's NEOM and AIUla continue to position Saudi Arabia as a regional filming destination, hosting local and international productions in line with Vision 2030 objectives

Digital video market growth

KSA's digital video content market was valued at **SR8.3bn** (\$2.2bn) in 2025 and is projected to reach **SR19.1bn** (\$5.1bn) by 2034, equal to a **9.9%** CAGR, according to IMARC Group

Investment demand and enablers



- Growing demand for Arabic-language content
- Expanding production capacity and studio infrastructure; **350+** filming permits issued at AIUla from 2020-24, translating into **700+** production days across **five** feature films, **three** documentaries and **35** TV series
- KSA's video segment is expected to register a **9%** CAGR for 2023-27, reaching **SR15bn** (\$4bn)
- OTT platforms continue to capture a growing share of video consumption as audiences shift towards on-demand content
- While cinema and OTT follow different models, their shared opportunity to capitalise on Arabic content and converging audience preferences position them as complementary drivers
- Challenges include talent shortages, distribution bottlenecks and competition from global content, underscoring the need for sustained ecosystem development that reinforces the sector's unified trajectory



Local video content success supports investor confidence



Local content production

Norah, shot in AlUla, became the first Saudi film selected for the official Cannes Film Festival

The Red Sea International Film Festival and Saudi Film Festival increasingly showcase domestic talent. They also raise the international visibility of Saudi video content.

Incentive schemes offer cash rebates of up to **40%** on qualifying production expenditure. NEOM hosted **30+** productions in 18 months, with rebates rising above 40% for projects supporting local talent development.

KSA offers competitive filming permit and public location fees, typically ranging from **SR299** (\$79.70) to **SR500** (\$133) per day - compared, for example, to Dubai's typical **AED2500** permit fee (\$681). This supports lower baseline production costs for film and content creators.

Sattar, produced locally by Telfaz11, grossed **SR40.5m** (\$10.8m) after release in 2022. This surpassed major international titles such as The Batman and The Joker at the Saudi box office, according to the Saudi Film Commission.

Impact on investor confidence

Local production growth is attracting international investment. Platforms like Netflix, Starzplay and Shahid are expanding Arabic-language content, while MBC Group's 2024 IPO underscores rising investor appetite for Saudi media.

Case study: UTURN Entertainment - local video IP



The contribution of UTURN Entertainment to KSA's digital media segment began in 2010, with the launch of Arabic-language YouTube shows. Evolving from a YouTube aggregator, as of 2025 the company creates custom-made branded content, owns IP and provides production services. This strategic shift has positioned UTURN Entertainment as a notable local player in the Kingdom's creator economy and in the growth of Arabic digital content.

A journey of digital pioneering

2010 Digital inception

Company launched, establishing an Arabic-language YouTube channel



2011 First brand integration

Began to secure brand sponsorship deals



2015 Strategic pivot

Adapted business model to market shifts and independent creators



2018 Global alliance

Joined Webedia Media Group, an international media and content company



2019 National exposure

Became digital content partner for Riyadh Season



2024 TikTok collaboration

Partnered with TikTok for culturally resonant branded content



2025 Mature ecosystem

Operates as a diversified provider of original content brands, formats and services



Addressing key talent gaps

Content-commercial divide

The company identified a shortage in talent that understands both creative content development and commercial monetisation strategies

In-house development

Implements internal programmes, coaching and internships to cultivate professionals capable of bridging the gap



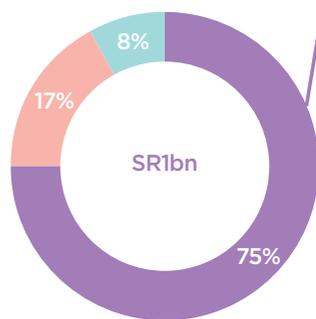
KSA's expanding audio landscape: streaming, events and investment

In the wider MENA region, recorded music revenue grew by 22.8% in 2024, according to IFPI data, with streaming accounting for 99.5% of total revenue per the same source. Saudi Arabia maintains a robust position within this expanding ecosystem – as local artists gain international visibility, and private sector investment drives platform expansion and live performance infrastructure. The segment is also shaping perceptions of Saudi culture, extending KSA's creative influence across global music networks.

Streaming accounts for around three-quarters of the audio segment's value, 2025F

Share of market size by subsegment

● Audio streaming ● Radio ● Physical sales



KSA's audio streaming market generated **SR4.1m** (\$1.1m) in 2024 and is projected to reach **SR11.3m** (\$3m) by 2030, equivalent to an **18.4% CAGR**. Music remains the largest revenue-generating segment.

Home-grown Thmanyah has emerged as a regional leader, exceeding **100,000** active listeners within two months of launching its Radio Thmanyah app

Subscriber growth signals expanding monetisation potential in Saudi audio streaming

Anghami's subscriber growth, 2022-24 (year-on-year)



Challenges

The rise of live music and on-demand audio services is gradually reducing reliance on traditional radio. However, **84%** of Saudis still tune in for an average of **three hours** a day, according to a November 2023 Ipsos study.

Over-reliance on streaming revenue and limited diversification beyond major festivals could expose the segment to volatility. Meanwhile, capacity gaps in VFX, sound design and virtual production limit progress in localisation and international competitiveness.

IP protection and enforcement continue to evolve. Complex legal procedures, cross-border piracy and limited alignment with international standards pose challenges for media stakeholders.

Live events, international positioning and evolving demand



Saudi Arabia's event management market was valued at **SR7.bn** (\$2bn) in 2024, according to analysis that year from Mordor Intelligence. This is expected to rise to **SR9.8bn** (\$2.6bn) in 2025 and **SR15.8bn** (\$4.2bn) by 2030 – equal to a **9.7% CAGR**.



Home-grown music platform MDLBEAST continues to strengthen large-scale live event infrastructure, artist development and international collaboration. This includes a partnership with NEOM announced in 2024.



Flagship events such as MDLBEAST Soundstorm, XP Music Futures and XPerform provide platforms for Saudi artists to connect with international audiences, music executives and global industry networks



Saudi listeners are shifting towards digital and subscription-based audio platforms. There is growing interest in locally produced and Arabic-language content alongside global artists.



Partnerships and innovation present pathways to audio monetisation

The Kingdom's audio production ecosystem comprises strategic partnerships, inclusive talent development and financial incentives. This, alongside IP protection and infrastructure investment, is positioning Saudi audio for long-term creative and commercial growth.

Streaming platforms and partnerships

KSA's audio market size was valued at **SR971m** (\$259m) in 2024, with a projected CAGR of **4%** to reach around **SR1.1bn** (\$294m) by 2027. Per a YouGov 2025 survey, **60%** of Saudi adults listen to at least one hour of podcasts per week.

International platforms Spotify and Apple Music maintain a strong presence in KSA. Nonetheless, global platforms are entering into local partnerships, such as a deal between France's Deezer and KSA's Rotana for regional content expansion.

Industry infrastructure and investment momentum

Saudi Arabia's audio industry is gaining traction as investment in production, skills and technology grows. Partnerships drive monetisation through co-production, shared IP, licensing and advertising.

Merwas, launched in Riyadh in 2022, is the world's largest music production facility. This was developed with CDF support to expand infrastructure and nurture Saudi talent.

New infrastructure – from NEOM's entertainment zones to AIUla's recording facilities – is establishing high-quality production capacity

The sector benefits from targeted regulatory support, public-private partnerships and funding initiatives. These include Saudi Broadcasting Authority support, MiSK grants, and programmes such as the Music Commission's San'ah initiative and the International Music Academy in Taif.

Source: Gmedia; Ken Research; OBG research; TAM; Thmanyah; YouGov

Case study: Thmanyah – Saudi storytelling

thmanyah

Founded in 2016, Thmanyah is a subsidiary of SRMG specialising in podcasts, documentaries and digital media. The company produces Arabic-language content designed to resonate with millions of viewers across the Arab world, combining storytelling with modern production techniques to reflect the region's evolving creative landscape.

Arabic storytelling



Produces podcasts and films designed to capture real conversations and everyday life

110m+
global
views

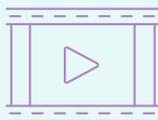
Finjan podcast episode (in 2024) became the most-viewed podcast globally on YouTube, with 110m+ views

Audience-driven innovation



- Content shaped by listener and viewer feedback
- Expanded from audio podcasts into an integrated ecosystem including Thmanyah Radio, the Thmanyah app and a growing visual-media division

Saudi talent and quality



- In-house teams manage scripting, filming and post-production
- Invests in training and mentoring emerging Saudi creators to raise local production standards

Expanding reach



- In 2025 launched satellite channels and secured Saudi football broadcasting rights through 2031
- Aims to make authentic Arab storytelling a recognised global benchmark for creative excellence



The future of publishing in KSA: digitalisation, AI and translation

The Kingdom's publishing segment is undergoing a measured transition: while print remains dominant, digital formats are steadily expanding. Supported by targeted public programmes and private sector innovation, the shift is being shaped by rising smartphone usage, AI integration and evolving consumption models. The segment offers niche investment opportunities in digital content, education, translation and news services – particularly as platforms modernise operations and diversify revenue streams. These developments support Vision 2030's cultural and knowledge-economy ambitions.

SR4.5bn

(\$1.2bn) annual investment in publishing sector, per Monsha'at in 2024

2500+

Publishing houses operating across KSA, per the same source

42%

Share of female authors in new literary output in 2022

Newspapers account for over three-quarters of KSA's consumer publishing market, 2025F

Share of market size by subsegment

● Newspapers
● Books
● Magazines



SR28m

(\$7.5m) book sales at the 2024 Riyadh International Book Fair

341

Works translated into Arabic in 2022 – a 17% annual increase, per Monsha'at data



The market is expected to register a **3% CAGR** from 2024 to 2027, reaching **SR2.2bn** (\$587m)



Newspaper and magazine revenue is expected to decline slightly to **SR1.55bn** (\$413m) by 2027, from a forecasted SR1.56bn (\$417m) in 2025, according to Statista, as social media and digital-first content gain traction

Market dynamics

Print retained an **82%** share of newspaper and magazine revenue in 2024, although this reflects a gradual annual decline of **4%**. By 2023, **62%** of Saudis read online newspapers, while **39%** read print publications daily and **36%** read magazines weekly, per Ipsos data.



SRMG remains a central player, investing in digital content through new platforms like Manga Arabia and Billboard Arabia



Fairs and translation

- Major events like the Riyadh International Book Fair – with **1m+** visitors from **30** countries, generating **SR28m** (\$7.5m) in sales in 2024 – cater to domestic readership and international interest
- The Tarjim initiative saw the translation of **292** books and **42** academic cultural journals, involving **11** languages, in its first year of operation, during 2021; reaching **858** books with **800+** translators from **33** countries by 2024
- Publishers continue to rely on book fairs amid fragmented retail networks; print-on-demand is emerging as a viable distribution alternative, enabling readers across the region to order physical copies via mail or local pick-up points
- KSA's strengthened IP framework, overseen by SAIP, supports digital publishing and translation rights protection – reinforcing confidence in online content expansion



Digital platforms and innovation widen publishing reach and returns

Saudi publishing is evolving towards digital formats, supported by rising smartphone use and government-led literacy initiatives. While print readership declines, digital publishing and e-books are expanding access to local and regional audiences.

Key enablers

Funding support: Government-backed initiatives such as Mu'allaha 45 offer financial incentives to foster Arabic literary talent and creativity, including cash awards of up to **SR1m** (\$300,000)

Infrastructure strength: Through entities like Saudi Publishing House and the King Fahd Glorious Qur'an Printing Complex, the Kingdom maintains facilities for both digital and traditional publishing

Talent development: A growing ecosystem of academies – including the MoM's Communication Academy, MBC Academy, the Saudi Broadcasting and Television Training Academy, the Saudi Media Academy, SPA News Academy, SRMG Academy and Whitelens Academy – is nurturing a new generation of editors, digital media professionals and content creators

Literacy and access: Literacy initiatives have pushed the adult literacy rate to **96%+** while the rise of book fairs, social media communities and reading clubs is encouraging wider public engagement



Innovation

While print still dominates, targeted investment in digital platforms, AI-assisted translation and digital publishing could expand the reach of Saudi authors – provided that pricing, distribution and retail channels are aligned. Generative AI is unlocking new efficiencies, from productivity gains to tailored reader experiences. Concerns include misinformation, IP rights and job displacement – highlighting the continued importance of human oversight and the cultural credibility of Saudi narratives.

Case study: Argaam – publishing innovation

argaam

Established in 2007, Argaam is a KSA-based financial data and news provider offering real-time coverage of markets, macroeconomic indicators and listed companies. In 2015 it launched an English-language platform to extend its reach across the GCC. The company combines editorial, technology and research functions to deliver scalable information to institutional and retail users. Argaam provides an example of innovation, content localisation and strategic expansion in digital publishing.

Operational pillars

Data

Accuracy and credibility underpin operations

Infrastructure

Trained analysts and technology facilitate accuracy and scalability

Automation

30% of content is auto-generated for speed and scale

Bilingual access

Arabic and English platforms serve domestic and international investors

Vision 2030 alignment



Economic diversification
Covers non-oil sectors



Digital transformation
Expands access to market data



Localisation
Prioritises Saudi talent and data ownership

Strategic partnerships and growth

srmg Majority owner SRMG offers support while upholding Argaam's independence



Covers macroeconomic themes and non-oil sector



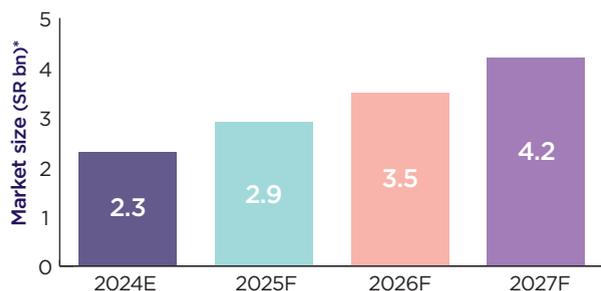
Scaling AI-powered data services



Building regional and global partnerships

Gaming and e-sports: scaling through investment, events and youth engagement

Gaming market size is projected to register a 23% CAGR, 2024E-27F



*Media components only, including studios, testing companies, game adjacencies and pro e-sports teams; excludes adjacent event-focused components

Consumption and regulation

23.5m gamers in KSA, equal to two-thirds of population, in 2025

59% of KSA gamers aged 15-24, and **42%** female, in 2025

640 electronic games age rated, and **165** cleared, by Gmedia in 2024. A further **414** were age rated, and **123** cleared, from January to September 2025. This brought the cumulative total to **3795** age rated and **2394** cleared by September 2025.

Production and strategic goals

250 gaming companies targeted by 2030, per NGES

30 games by KSA studios to be among top-300 globally by 2031, per NGES

20+ local gaming studios by 2023

Sector outlook

- KSA's gaming market is expected to register a CAGR of **23%** from 2024-27 – reaching **SR4.2bn** (\$1.1bn) across media-related components such as studios, gaming adjacencies and e-sports teams, and excluding events
- The gaming and e-sports market aims to unlock an economic contribution of over **SR50bn** (\$13.3bn) and create around **39,000** jobs in development, publishing and infrastructure, among others, by 2030
- Monetisation in Saudi gaming is underpinned by mobile platforms, with developers reporting **42%** of revenue from in-app purchases and **78%** from in-app advertising, per data from 42matters

Gap analysis



Production capacity

Only **eight** studios, **33%** of the total, have the capability to develop large-scale games, per nine66 and Gmedia. This limits the pipeline of locally produced titles.



Market misalignment

60%+ of Saudi developers prefer PC games. However, mobile accounts for two-thirds of gaming revenue per Gmedia analysis of Newzoo and Statista data, constraining commercial scalability



Export and partnership hurdles

IP rights protection, content classification requirements and censorship protocols may hinder the scaling of exports and global partnerships. Complex licensing procedures and regulatory approvals can further delay market entry and partnership execution.

Investment drivers and competitive edge

- VC support is growing, led by NDF and SDB's **SR450m** (\$120m) injection into early-stage gaming VC funds in 2024
- The sector's appeal is reinforced by the scale of consumer engagement. This is evident in marquee events such as the E-Sports World Cup in 2024, with a **SR225m** (\$60m) prize pool
- Local champions like FIFA E-World Cup winner MSdossary7 and rising youth talent provide examples of the country's presence on the global e-sports stage
- Funding mechanisms include grants for e-sports teams and co-investment through Savvy Games to support developers, incubators and accelerators



NGES outlines opportunities along the value chain

NGES outlines opportunities across the value chain

Consumption-driven adjacencies

Development of global event venues; positioning the Kingdom as a streaming destination for Arabic-speaking audiences; support for local gaming IP creation; and initiatives to enable blended reality through augmented and virtual reality



Education and talent development

Design of gaming-related curricula, university e-sports programmes and research centres of excellence, alongside partnerships with international gaming academies – to build skills in game development and immersive technologies

Technical and physical infrastructure

Investment in ultra-low latency networks; deployment of regional servers to enhance gameplay quality; and construction of state-of-the-art studios and arenas



Unlocking economic opportunity

NGES is a cornerstone of Saudi Arabia's creative economy, driving innovation, job creation and long-term value across the digital entertainment ecosystem

Enabling ecosystem: infrastructure, talent and partnerships

- The PIF committed **SR143bn** (\$38bn) to gaming and e-sports initiatives in 2022 through Savvy Games Group
- The SEF oversees support through initiatives like the Kick-Off Fund, Performance Fund and Maturity Fund
- In 2024 UAE-headquartered e-sports network True Gamers announced a **SR169m** (\$45m) investment to establish **150** gaming centres in the Kingdom
- Strategic alliances, such as The Sandbox-Sandsoft partnership and SEF's collaboration with UK and Japan federations, aim to localise expertise and boost international visibility
- NGES is a flagship Vision 2030 programme, designed to position the Kingdom as a regional gaming powerhouse

Case study: Savvy Games Group – Enabling the NGES

SAVVY
GAMES GROUP

Savvy Games Group, a PIF company, plays an important role in implementing Saudi Arabia's NGES. Through global acquisitions and domestic ecosystem development, it supports KSA's ambitions to become a leading player in the segment. By contributing to the NGES and Vision 2030 objectives for innovation and youth empowerment, Savvy Games Group is an example of transformation in the Kingdom's media and entertainment sector.

Strategic objectives



Publishing and development

Deliver high-quality games and experiences for players worldwide



Local impact

Build a robust games ecosystem in KSA through partnerships and initiatives focused on talent development and job creation



Expansion

Drive long-term growth and innovation in the global games and e-sports industry through strategic acquisitions



E-sports

Facilitate the growth of the global e-sports sector, in which the company has **40%** market share in terms of viewership

NGES targets

SR50bn (\$13.3bn)

Economic contribution unlocked by the segment by 2030

39,000

Jobs in the sector by 2030

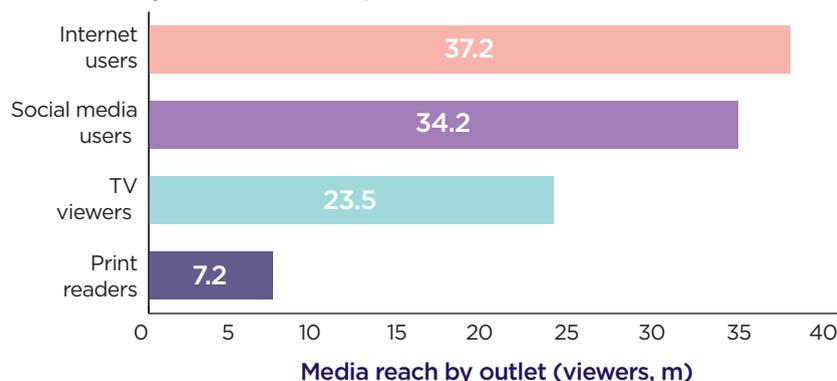
Talent development and education

Savvy Academy offers a suite of programmes. These include:

- Next-generation programme: school-based initiative for pupils to learn more about game-making
- Level-up programme: vocational training on game development and e-sports management for university students
- Kickstarter programme: internship at Savvy and its subsidiaries to offer hands-on professional experience
- Incubator programme: to help entrepreneurs build and grow their businesses in the segment
- Masterclass programme: events that bring international experts to Riyadh for sessions and workshops

Digital platforms are redefining KSA advertising and marketing

Digital platforms have a considerably higher reach than traditional platforms in KSA, 2025E



Much of Saudi Arabia's digital advertising market remains dominated by international players. Around **70-80%** of the **SR5.6bn** (\$1.5bn) spent on digital ads in 2022 went to global platforms such as Google and Meta, according to Asharq Al-Awsat. This results in roughly **SR3.75bn** (\$1bn) leaving the Kingdom annually, underscoring the need to strengthen local networks and retain more value within the national economy.

Sector growth and digital shift



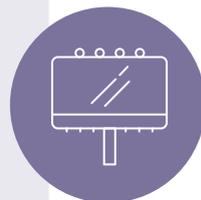
Ad spend in KSA is set to reach **SR9.4bn** (\$2.5bn) in 2025, an increase of **10.5%**. Search advertising accounting for **SR3.8bn** (\$1bn) per Statista. Alongside social and influencer-led marketing, the channel mix includes paid search, programmatic display, OOH and emerging retail media networks.

Digital channels are expected to represent **90%** of KSA ad spend by 2029, per Statista. This is driven by programmatic adoption, with 80% of revenue, and brands investing in digital campaigns to reach tech-savvy consumers. AI is increasingly shaping marketing strategies, enabling data-driven audience targeting and campaign optimisation.



Google AdSense rates in KSA are around **SR0.79** (\$0.21) per 1000 impressions as of 2024. This is below the UAE - with **SR1.31** (\$0.35) - and close to Oman's **SR0.64** (\$0.17), highlighting comparatively cost-efficient digital reach for advertisers.

Outdoor advertising is also expanding - forecast to grow from **SR1.4bn** (\$369m) in 2024 to **SR2.3bn** (\$624m) by 2033, per IMARC Group. Growth factors include technological advancement, smart city solutions and a young demographic.



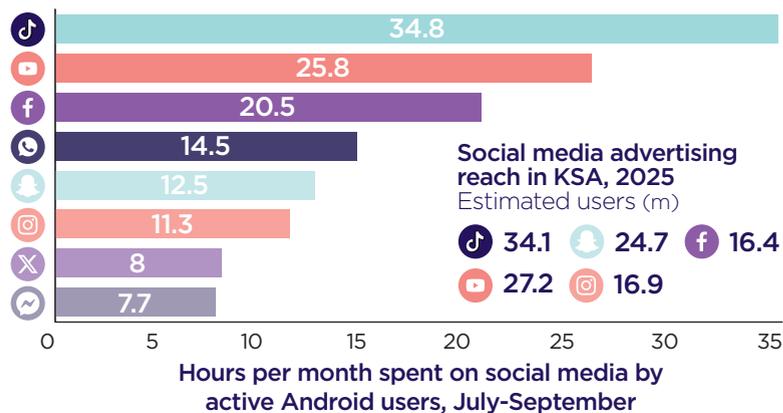
New requirements - including the Mawthooq licence for paid influencer content, and CST registration for OTT and gaming platforms, both introduced in 2022 - are shaping influencer marketing practices and platform access across KSA

Seasonal campaigns during Ramadan and Eid are key, with a **44%** uptick in spending and a positive consumer response to culturally aligned advertising, according to data reported by digital marketing agency IstiZada



Social media and AI are reshaping advertising and marketing

TikTok and YouTube account for most time spent on social media, 2023



Influencer economy and content creation

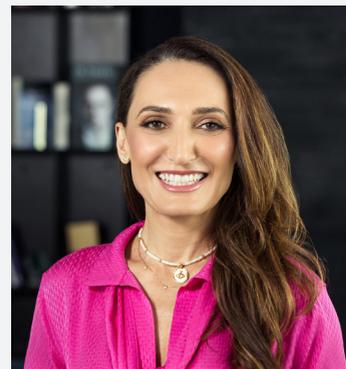
KSA's digital content creation market is projected to expand from **SR2.2bn** (\$580m) in 2023 to **SR5.3bn** (\$1.4bn) by 2030, with a CAGR of **13.7%**, according to Grand View Research

KSA's creator economy grew by **32%** in Q1 2025 - led by an increase in niches such as beauty, up **56%**, lifestyle, up **46%**, and fashion, up **18%** - according to a study by Admitad and Stllr Network

In the same period, TikTok recorded the highest growth in influencer-driven sales among all platforms, with its penetration reaching **88%** of the population, per the same source

Campaign effectiveness increasingly depends on clear alignment with brand goals and measurable engagement outcomes such as conversion and acquisition costs. According to McKinsey, organisations that integrate AI into marketing and sales strategies witness return on investment improvements of **10-20%**.

Interview: Elda Choucair, CEO, Omnicom Media Group MENA



Elda Choucair

In which key ways is Saudi Arabia's advertising segment evolving, and what standout opportunities does this present?

CHOUCAIR: Media agencies have reinforced their presence in Saudi Arabia since 2020, investing in regional headquarters, new offices and upskilling programmes. The most prominent growth opportunities are in the digital segment, driven by the Kingdom's large-scale social media consumption. Snapchat and TikTok register some of the highest usage statistics globally, leading to a 'social-first' approach in advertising planning and buying. The industry is becoming more sophisticated, leveraging tools to link advertiser spend to return on investment (ROI). For international players, opportunity lies in leveraging this digital-first consumer behaviour and the Kingdom's commitment to growth. Traditional channels and live sports remain a powerful vehicle, offering a localised solution - including outdoor media, which is expanding and increasingly digitalised - to Saudi businesses.

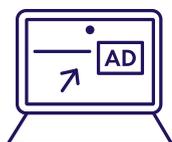
How are emerging technologies reshaping advertising, and which strategic challenges remain in the Saudi market?

CHOUCAIR: Technology, namely artificial intelligence (AI), is fundamentally changing our industry. As media agencies manage advertisers' budgets, we must constantly evolve our skill sets to navigate shifting platforms. There is a clear shift in the DNA of advertising towards technology and data, where understanding the science is as crucial as the art. AI is democratising content creation, making it more accessible for creative talent. However, challenges persist. There remains a lack of Arabic content within the GCC, requiring considerable long-term investment that may not yield immediate ROI. Lastly, a mindset shift is required to view marketing as a long-term investment in brand equity, rather than just a cost. Any brand that stops investing will risk regression.



Innovation and partnerships fuel advertising growth

Saudi advertising is entering a new era. Backed by near-universal internet access and of the world's highest social media engagement rates, digital platforms are evolving from brand-building tools into real-time revenue drivers. The convergence of AI, video and data-led personalisation is positioning innovation as an engine of KSA's marketing transformation.



Ad-tech innovation and investment enablers

Saudi Arabia's ad-tech market generated **SR101m** (\$26.9m) in 2024 and is forecast to reach **SR312m** (\$83.1m) by 2030, equal to a **20.7% CAGR**

The government-backed **SR4.1bn** (\$1.1bn) IGNITE initiative and **SR2.6bn** (\$700m) Saudi VC Company are supporting start-ups in advertising and marketing

In Q1 2025 KSA ad-tech platform Quantum raised **SR26.3m** (\$7m) in Pre-Series A funding from global investors including HearstLab – marking the firm's first Middle East investment

Saudi ad-tech start-ups such as Taswiq.ai and Lucidya are rolling out AI solutions that enable e-commerce firms and brands to improve campaign targeting, automate content and analyse consumer sentiment in Arabic with greater accuracy

AI adoption in Saudi marketing is driving engagement, purchase intent and lower acquisition costs, while also enabling personalisation and automation. However, high system costs and a shortage of skilled analytics professionals limit the pace of expansion, highlighting the need for sustained investment in digital capabilities.

Interview: Mohammed Al Khereiji, Chairman, Al Arabia; Chairman, SMC Group



Mohammed Al Khereiji

How is the media sector shaping opportunities in advertising?

AL KHEREIJI: The sector has undergone a fundamental transformation, evolving from a relatively underdeveloped industry to one that plays a central role in the economy. This shift has been driven by institutional reforms, the emergence of new platforms and the consolidation of major players.

Advertising expenditure still accounts for a smaller share of GDP than in comparable international markets, highlighting untapped potential. At the same time, digital platforms have become central to audience engagement. Social media, streaming and online video have grown rapidly, supported by one of the world's highest internet penetration rates. Sports and entertainment are also emerging as powerful vehicles for advertisers, while the rise of e-sports has created new opportunities to reach younger audiences. Investment in digital billboards and data-led planning is transforming outdoor advertising from a static medium into one that is interactive and closely integrated with mobile campaigns.

What are the main challenges and priorities for sustaining the momentum in Saudi Arabia's media sector?

AL KHEREIJI: Regulation and talent development remain priorities. A clear and predictable regulatory environment is essential to attract long-term investment and encourage innovation. At the same time, as media becomes increasingly technology-intensive, the sector requires a workforce with advanced skills in analytics, advertising technology and creative operations. Developing this talent base is as important as expanding infrastructure. If these challenges are addressed, Saudi Arabia will continue to strengthen its media ecosystem, consolidating its position as a regional leader.





Strategic growth drivers in KSA's media sector

Saudi media has expansion potential in emerging areas such as Arabic-language extended reality content, cloud-based post-production and the monetisation of licensed creators. Market fundamentals are supported by high digital engagement, a young population and government initiatives to professionalise the ecosystem. Transformation supports cultural identity, promoting locally produced content that reflects national values while appealing to global audiences. However, capacity gaps in VFX, sound design and virtual production limit progress in localisation and international competitiveness.

While initiatives such as the Metaverse Academy and investment in digital production tools signal infrastructure growth, gaps in workforce skills, the quality of locally produced Arabic-language content and sector-specific facilities remain. For example, the number of advanced local production studios is limited, infrastructure availability is uneven across regions and the export share of Saudi-produced content is low compared to regional peers.

Addressing these gaps through targeted public-private investment, technology transfer and local talent development could unlock both domestic market growth and export potential. For example, partnerships with global VFX houses and scholarship programmes could ultimately help to reduce dependence on Arabic content sourced from overseas. The SR4.1bn (\$1.1bn) IGNITE programme aims to upskill 4400 professionals in film, gaming and digital advertising during 2024-27. Progress in these areas would also signal the strength of domestic talent pipelines to investors.

Emerging technologies are reshaping the Kingdom's future media capabilities

Immersive and AI-driven media formats

- Generative AI is enabling interactive, choice-based storytelling and more personalised entertainment experiences
- Adoption will depend on user demand, domestic cloud capacity, and robust data and content governance for immersive media
- KSA's digital news consumption continues to expand, driven by high social media usage and the shift towards mobile-first reading. Leading players are integrating video, podcasts and AI-supported content delivery to meet evolving audience expectations.
- Immersive formats such as concerts, gamified content and virtual spaces enhance engagement; local examples include MDLBEAST's Soundstorm, which combines large-scale live performances with digital platforms and online engagement
- The Metaverse Academy aimed to train **1000** people in immersive tech by end-2024
- Local firms like Dolf Technologies are producing Arabic virtual and extended reality content

Blockchain and smart contracts in content ownership

- Blockchain systems can reduce reliance on intermediaries and combat fraud in advertising, while enabling the automation of royalty payments
- Saudi Arabia has trialled blockchain across multiple services and continues to explore its commercial use per CST, positioning the media sector as a potential next adopter
- In 2024 Saudi tech firm Virtual Vision launched a Blockchain-as-a-Service platform, offering local companies – including media firms – the tools to deploy blockchain applications for licensing, payment and rights management
- Microsoft's Xbox pilot cut royalty processing time by **99%** using smart contracts, reducing operational effort by **40%**
- Nevertheless, headwinds include infrastructure suitability, usability and a secure regulatory framework

Metaverse investment and innovation infrastructure in KSA

- NEOM's **\$1bn** metaverse project will create a digital twin of the city for immersive experiences
- The Mukaab in Riyadh aims to integrate immersive retail, culture and entertainment by 2030
- AIUla's digital twin experience enables visitors to explore heritage sites virtually, aligned with KSA's digital tourism efforts
- Nonetheless, adoption challenges include cost, cultural fit and content demand

Strategic investment and capacity building

- PIF's HUMAIN is building data centres with 500 MW capacity to support domestic large language models
- PwC estimates that AI could contribute around **SR507bn** (\$135bn) to Saudi Arabia's economy by 2030, equivalent to **12.4%** of GDP – underscoring its potential to transform the media and creative industries
- KSA's metaverse market is forecast to expand from around **SR5.6bn** (\$1.5bn) in 2024 to **SR139.5bn** (\$37.2bn) by 2033, per IMARC Group
- However, the pace of adoption will depend on user readiness, infrastructure expansion, responsible data governance and regulatory support
- Together, these innovations reflect Saudi Arabia's commitment to positioning technology as a pillar of its cultural and economic transformation under Vision 2030
- A coordinated national technology agenda, including forthcoming AI media initiatives as of end-2025, is expected to shape long-term adoption pathways and guide future investment decisions across immersion, blockchain and intelligent content production

AI Engagement Index, 2025

China	29.56	UK	16.56	KSA	4.33
Germany	27.74	Japan	14.05		
South Korea	18.99	Singapore	10.39		

The Kingdom ranked **26th** globally and **1st** among the GCC (with UAE second, in **44th**). Its score signals robust momentum, while highlighting further scope to converge with the world's leading AI adopters.



Infrastructure and technology gaps present opportunities for targeted development

Targeted expansion in training and technical capacity could help to overcome capability gaps and unlock strategic opportunities

Ongoing initiatives relevant to the sector include Vision 2030's Human Capability Development Programme, the Metaverse Academy and the King Salman Scholarship Programme (Promising Path). In addition, the **SR4.1bn** (\$1.1bn) IGNITE programme aims to upskill **4400** professionals in film, gaming and digital advertising during 2024-27. Gaps as of the second half of 2025 include:



Demand for production infrastructure, including pre- and post-production services, and high-capacity game studios



Need for specialised training in immersive production skills, including sound design, VFX and virtual production



Logistics services required for location-based shoots outside of production zones



Public-private alignment on licensing and content review frameworks could improve sector efficiency

Development opportunity



Studio infrastructure across KSA

Eight sound stages are operational across NEOM, Bajdah and AIUla, but broader geographic coverage is limited. Film studios are expected to increase from **three** in 2020 to **11-15** by 2030 - highlighting a long-term opportunity for capacity expansion.



Other technology facilities

Expand access to virtual production, dubbing, cloud-based editing, real-time rendering and VFX capabilities



Skilled workforce

Develop upskilling pathways for local talent across video, audio, publishing and content strategy



Logistics and operations

Offer services for remote production support, equipment mobility, campaign rollout, on-set solutions and live events assistance



Unlocking private funding

CDF initiatives, such as its **SR878m** (\$234m) Film Sector Financing Programme, encourage greater private investment in production and training by using public capital to de-risk projects. This blended model strengthens long-term sector sustainability.



Regulatory engagement

Alignment between public and private stakeholders on licensing, content classification and IP protection frameworks could improve sector efficiency

Filling these gaps could generate measurable outcomes, including greater local content creation, improved export competitiveness, lower production costs and diversified geographical opportunities. Additional headwinds include cost overruns, a shortage of specialised educators and IP enforcement challenges. Collectively, these efforts form part of Saudi Arabia's wider media empowerment movement under Vision 2030, aimed at transforming the Kingdom into a leading producer and exporter of creative content.

Incumbent constraints in financial and human capital could limit sector growth

Limitation



Funding

Limited access to funding for early-stage creators and SMEs



Talent

Skills gap in VFX, virtual production and post-production. **54%** of KSA respondents in a 2019 survey reported being dissatisfied by the quality of Arabic films.



Content

Low volume of high-quality local content; limited institutional mechanisms for creator financing, training and distribution



90% of Arabic video content production still occurs abroad. The majority of large players are based in Egypt, Lebanon and the UAE – highlighting a sizeable investment opportunity to localise production in KSA

Strategic response



Funding access

Launch of the **SR879m** (\$234m) Film Sector Financing Programme in 2024 – with **70%** allocated to content and production, and **30%** to supporting infrastructure and companies



Workforce development

National upskilling drive through vocational training, Saudisation policies and specialised media programmes are building local expertise. Partnerships with global VFX houses and scholarship programmes could strengthen the local talent base.



Academic partnerships

Collaboration with global institutions, such as New York University Tisch, to expand local degree and training options



Content localisation

Support for Arabic content via CDF and Saudi Film Fund

Education, innovation and investment are interlinked pillars driving Saudi Arabia's media empowerment. Collaboration between public and private actors could bridge skills and funding gaps, ensuring sustainable growth aligned with Vision 2030.

Case study: Pearson – Learning localisation



Pearson

International education provider Pearson has been active in KSA since 2008, supporting Vision 2030 through English language learning, assessment and workforce readiness. Its initiatives focus on equipping students and professionals with globally recognised skills, while adapting content to local needs.

Language proficiency and employability

English proficiency is seen as critical for Vision 2030. A 2024 survey found that **98%** of Saudi respondents view English as essential, with earning potential rising by **60-100%** for English speakers.

Trusted certification

The Pearson Test of English provides placement aligned to students' English proficiency level. This allows exemption from basic English courses within the preparatory year – granting students more time to focus on other core subjects such as maths and science – at universities such as King Saud University and King Abdullah University of Science and Technology. This streamlines access to higher education.

Localisation and cultural relevance

Pearson has localised learning resources by integrating Saudi topics and Vision 2030 education reforms. This aids engagement and cultural relevance.

Innovation in learning

Pearson integrates AI in testing and apps. This includes generative AI chatbots that provide real-time, culturally appropriate conversation practice.



UGC and new content ecosystems are reshaping media consumption in Saudi Arabia

Short-form video and livestreaming on platforms such as TikTok, YouTube and Snapchat are driving engagement and ad spend, particularly among younger users. This shift reflects a wider transformation in consumption and production patterns, with independent digital creators becoming an increasingly important part of Saudi Arabia's evolving media ecosystem.

94+%

of internet users in Saudi Arabia are active on social media



Influencer-driven content is playing a growing role in the creative economy, with 70% of Saudi consumers reportedly trusting influencer recommendations over traditional advertising, according to data from Saudi marketing firm Catchers Agency



76.5%

penetration rate, with users opening the app 50 times/day on average



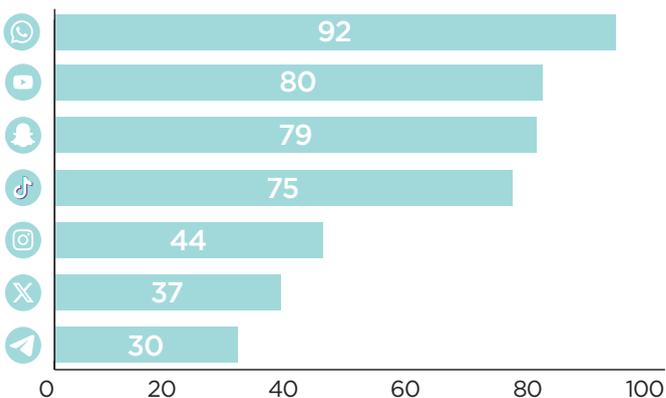
ads reached

135%

of the adult population in early 2024*

*A rate above 100% could represent duplicate or false accounts, or the extent to which users may misrepresent their age

Most-used social media applications in KSA per CST, 2024 (%)



Snap for Creators, launched in KSA's Diriyah in 2024, supports 25m monthly users through AR tools, training and partnerships



In 2025 TikTok and SRMG partnered to train emerging creators, link them to events and platforms, and scale their reach across MENA

Social media ecosystem

Saudi creators are reshaping global perceptions of the Kingdom through culturally rooted storytelling and a growing volume of Arabic-language UGC that blends local identity with international appeal

Innovation and content revenue enablers

Government-backed initiatives such as IGNITE and SRMG Academy are supporting creator upskilling and digital content monetisation, aligning with national efforts to professionalise the creator economy

UGC is becoming an economic contributor, with Saudi creators generating rising demand for digital services, brand partnerships and platform-based monetisation as part of KSA's expanding digital economy. New creator monetisation mechanisms, including digital collectibles and micro-royalty models, are emerging across regional platforms, offering additional revenue pathways for independent creators.

SR15,000

(\$4000) Mawthooq influencer permit, regulating paid social media advertising, provides a formal framework for influencer monetisation and promotes brand transparency. By 2025 around **8400** permits had been issued, although the cost may limit accessibility for smaller creators, favouring more established influencers.

3rd rank

globally for KSA in 5G download speed and 13th globally in 4G/5G availability, according to Opensignal, supporting high-quality video and livestreaming across platforms like TikTok and Snapchat



Local content demand and digital consumption are reshaping Saudi media

The Kingdom's media audience is increasingly drawn to locally produced content, contributing to shifts in platform popularity, investment strategy and the talent pool

Demand for Arabic-language content is rising



Only **4%** of Netflix's Saudi catalogue is Arabic-language - highlighting the dominance of foreign content

71% of Saudi online media viewers watched locally produced content in Q1 2024, establishing a strong baseline for Arabic-language content demand

Netflix has expanded its Arabic offering with new seasons of regional shows, including *Al Rawabi School for Girls*, *Finding Ola*, *Dubai Bling* and *The Exchange*



This underscores the gap filled by local platforms like **Shahid** and **STC TV**, which lead in Arabic streaming content

Gmedia supports the expansion of locally produced content by streamlining licensing, setting clear production standards and enabling collaboration that strengthens domestic output

The limited availability of domestic content distribution companies continues to constrain wider regional reach, increasing reliance on international aggregators

Digital engagement is deep and growing

Online engagement outpaces global average



KSA users spend **3 hours 6 mins** daily on social media - 42 minutes more than the global average

Monetisation is accelerating across new formats



Short-form video ad spend is projected to reach SR477.1m (\$127m) by 2028, reflecting growing demand for bite-sized, mobile-first formats. This is part of KSA's wider advertising market, which reached SR23.6bn (\$6.3bn) in 2024 and is expected to grow to SR33.3bn (\$8.9bn) by 2033.

Interview: Abdulrahman Abumalih, CEO, Thmanyah



Abdulrahman Abumalih

Which key strategies can support the development of Saudi talent in the podcast industry - including talent across the full journey, from conceptualisation to production?

ABUMALIH: Podcasting, at its core, is a simple form of communication, with a host, microphone and a story to explore. Its success comes from intimacy: the closeness between the speaker and the listener. Over time, the awareness of quality - in sound, preparation and distribution - has grown. The natural next step is to build an integrated environment that supports talent: professional editing teams, recording spaces, strong training, education systems and platforms that amplify their work. If we invest in these foundations, Saudi podcasting can reach a global standard, without losing the simplicity and authenticity that makes it unique.

Where are the most notable advantages and challenges when making the determination of whether to transition from audio-only content to a video format within the podcast industry?

ABUMALIH: We do not see the move from audio to visual as a transformation from one medium to another, but rather as two complementary experiences for two distinct audiences. The audio experience continues to have unique strengths - intimacy, ease of access and personal connection. The visual experience, meanwhile, opens new avenues for engagement, storytelling and audience growth. This diversification allows media players to reach a wider public audience and experiment with new forms of interaction and expression. However, it requires significant investment in specialised teams, studios and production capabilities to ensure that every medium serves its audience in the best possible way. Ultimately, both audio and video formats form part of a single, integrated media ecosystem, with each medium enhancing the other.



A growing talent base enables investment pipelines

The Kingdom's media audience is increasingly drawn to locally produced content, contributing to shifts in platform popularity, investment strategy and the talent pool

Expanding talent pool, meeting demand for local content



67,000

Employees in the Saudi media sector by 2024, representing 4% growth since 2021

Saudi Arabia's cultural and creative industries are evolving in tandem with changing consumption habits

Rising employment and graduate output in the culture sector, which includes film, design and music, reflects expanding capacity to meet the changing expectations of a diverse and engaged audience base seeking Arabic-language content

As young professionals drive cultural production and demand, the push for locally resonant content is strengthening innovation across the media landscape. Training initiatives, including SRMG Academy's partnership with London Business School, further support this shift.

Education pathways are increasingly integrating AI and digital media technologies. Media academies now offer specialised courses such as Media Planning, Media Presence for Executives, the Media AI Bootcamp and the Media Leaders Track, supported by more than **160** trainers. These programmes are helping build a future-ready talent base equipped to work with advanced production tools and data-driven media systems.

Source: Gmedia; NOB; OBG research

Case study: NOB - Local marketing



Saudi marketing and communications firm NOB delivers Arabic-language campaigns tailored to local audiences. As of mid-2025 the company comprises **200+** employees and is preparing for a future initial public offering. Its locally anchored model highlights best practices in localisation, cultural relevance and KSA-wide reach.

Local talent, tailored strategy



Nationwide reach
Recruitment from all **13** provinces supports cultural authenticity and decentralised creative delivery



Local campaign leads
Campaigns are led by team members from the target region to reflect local context



Native Arabic content
Produced by Saudi creatives, enhancing connection with national audiences

Vision 2030 alignment



Viewing, audio and reading habits are reshaping demand, format and monetisation

Changing consumption habits reflect greater access to platforms, affordable data plans and evolving cultural preferences

Video: Evolving viewing habits and platform usage



Traditional TV remains dominant in Saudi Arabia, reaching over **96%** of the population, with average viewing time at **5h 25m** daily in 2023, up 15 minutes from the previous year



Livestreaming revenue valued **SR16.5bn** (\$4.4bn) in 2023, projected to reach **SR60.8bn** (\$16.2bn) by 2030 – a **20%** CAGR



During Ramadan, TV viewership in KSA increases by **17%** in daily reach and 6% in viewing time, driven by Arabic and religious programming

Social media consumption by age group in KSA, 2025

TikTok	28% aged 18-24; 46% aged 25-34
Instagram	23% aged 18-24; 46% aged 25-34
Facebook	46% aged 25-34; 19% aged 18-24
Snapchat	Around 90% of users are aged 13-34

Audio: Smartphone-driven audio habits and live events



67% of adults in Saudi Arabia listen to at least one podcast per week, per 2023 YouGov data



In 2025 KSA's audio subsector reached **165** digital channels and **246** podcasts



600% increase in live music events in KSA from 2022-25, facilitating audience engagement and tourism

Demand for Arabic content is expanding across regional streaming platforms, supporting growth in dubbing, localisation and IP adaptation, and opening export pathways for Saudi-produced media

Publishing and digital media: Shift from print to digital formats



Over **50%** of Saudis report reading at least one book per year, with trends shifting due to digital communities like BookTok – which has helped to reshape local reading habits and boosted interest in genres like fantasy, science fiction and thrillers



Most Saudi authors seek to publish digital formats alongside print, reflecting a shift towards faster, broader distribution



28.5% of educated Arabs use digital reading platforms – such as audiobooks, Kindle or story apps – with **15%** listening to audiobooks, per a 2022 survey



Smart devices and short-form video are reshaping engagement and monetisation

Evolving consumption habits underscore the Kingdom's young, tech-savvy and mobile-first media audience

Gaming and e-sports: Smart device popularity among gaming audience



Smart devices as the preferred platform for gaming in KSA is most popular among women, with **28.5%**, compared to 24.2% overall and 21% among men, per 2024 CST data. KSA is home to **23.5m** gamers, with **42%** female participation. Women represent around 20% of e-sports players in the Kingdom – well above the global average of ~5%.



Smart devices are the preferred platform for gaming among the 20-29 age group (30.8%), while **PlayStation** Portable (PSP) leads among 10-19 year-olds (54.8%), per 2024 CST data



YouTube Gaming (64%) and X (48%) are top platforms for e-sports viewing in Saudi Arabia, with Twitch emerging as a competitor across the region

Advertising and marketing: Short-form video and creator-led marketing



Short-form video content is reshaping engagement, with TikTok, Instagram Reels and Stories among top choices for advertisers. Average advertising spending per capita in Saudi Arabia's search advertising segment is estimated at **SR100** (\$27) in 2025, per Statista.



KSA's social commerce market is projected to reach **SR19.1bn** (\$5.1bn) by 2029, reflecting primary reliance on smartphones for digital access, and features like Instagram shopping tags. Digital channels are expected to account for **91%** of total ad spend in Saudi Arabia by 2030 per Statista.



Influencer advertising is gaining traction, with average spending estimated to reach **SR13.43** (\$3.58) per internet user in 2025. This reflects a shift towards content-driven promotion led by creators and the growing visibility of Saudi content across short-form platforms.

A 2024-25 study by Snap Inc., Omnicom Media Group MENA and Lumen found that Snapchat augmented reality formats captured up to **8x** higher attention compared to average social benchmarks. Commercials achieved **5.7x** higher attention than benchmarks, signalling strong ad-efficiency potential in the Saudi market.

Evolving global regulations and expectations the focus on trust and transparency

Trust has become a strategic asset in the media ecosystem. Saudi Arabia is strengthening this across the corporate landscape through clearer regulations that enhance transparency, improve the ease of doing business and bolster investor confidence. These governance measures also create the predictability that digital and media firms need to innovate, invest and scale. The Kingdom is emerging as a regional leader in media governance, strengthening alignment with global standards while shaping best practices across MENA.

Global regulations expand to address AI oversight, child safety and digital content standards



52% of US and 63% of UK news consumers are **uncomfortable** with largely AI-generated news according to a 2024 YouGov survey, driving regulatory focus



In KSA, SDAIA's National AI Strategy and Personal Data Protection Law sets principles for responsible AI use and data-driven advertising, supporting transparency and user protection



The EU's AI Act is undergoing phased implementation from 2025. This mandates labelling, transparency and risk-based rules for AI systems – emerging as a global reference point.



Child protection rules increasingly require age verification, under-13 bans and the moderation of harmful content



Age-verification laws are expanding globally, with the UK, US and EU. These require platforms to assess users' age before granting access to harmful content – although enforcement remains uneven and raises privacy concerns.

Shifting global expectations around trust, transparency and platform responsibility



Trust in news remains stable at 40% globally for the third consecutive year, but varies widely by country. This ranges from 67% in Finland to 35% in the UK and 22% in Greece, according to Reuters Institute Digital News Report 2025.



22% of global respondents identify news websites or apps as their main source of online news as of 2024. This marks a decrease of 10 percentage points since 2018, reflecting a growing shift towards discovery via social media and search engines.



Saudi Arabia's digital media regulations increasingly align with global expectations



KSA's approach to digital media regulation aligns with global governance standards

- AI governed by the 2020 National Strategy for Data and AI**

Sets ethics principles, sector-specific guidelines and a certification framework for responsible and transparent AI usage. These are on human values and cultural safeguards, designed to enhance investor confidence through clear ethical and governance standards. Overseen by SDAIA.
- Personal Data Protection Law governs AI and digital content**

The law – likewise under SDAIA's oversight – protects user data and underpins regulatory efforts around AI, digital identity and content protection. This helps to create a secure and transparent environment for digital investment
- Gmedia oversees mandatory film content clearance**

All films must be submitted for review and age classification under Gmedia's Film Content Classification and Clearance Service. While this can extend release timelines, it provides investors with regulatory certainty and clarity on compliance requirements.
- AMR mandates licensing and content compliance**

Platforms including OTT and social media must obtain local licences and adhere to media content rules aligned with cultural and religious values. This strengthens predictability and market entry transparency for foreign platforms, facilitating synergy with global media governance.
- Advertising regulated by key national laws**

The E-Commerce Law, issued by Royal Decree No. M/126 dated 7/11/1440H, prohibits false or misleading advertisements and requires adherence to cultural norms – providing clear standards for international brands and influencer-led commerce. Oversight by the Ministry of Commerce, with support from SDAIA, strengthens regulatory consistency and reinforces Saudi Arabia's position as a predictable, investor-ready digital market.
- Regulatory technology and compliance efficiency**

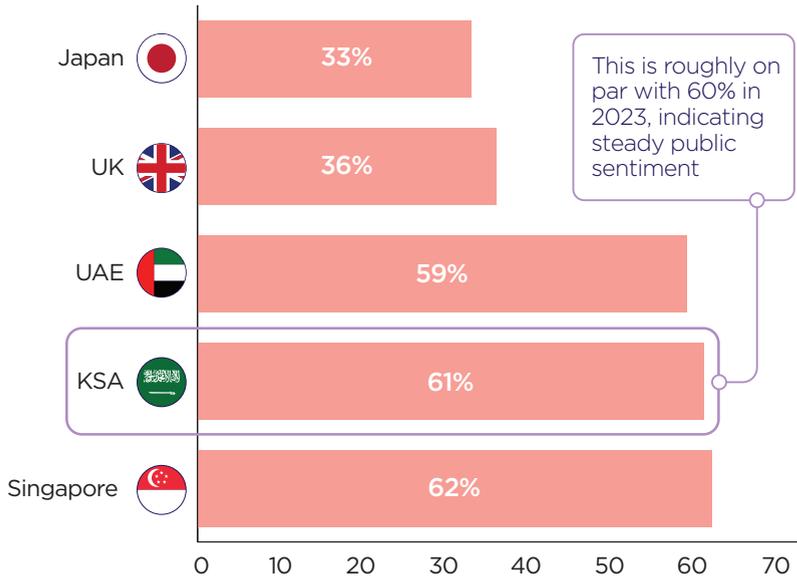
Digital licensing and automated compliance tools are streamlining regulatory processes. This reduces approval time and enhances predictability for media firms operating in the Kingdom.
- Data localisation for regulatory clarity**

KSA's regulatory framework incorporates data localisation requirements to ensure the domestic handling of sensitive user information and provide clearer compliance expectations for media platforms



Saudi media retains high levels of trust among the domestic audience

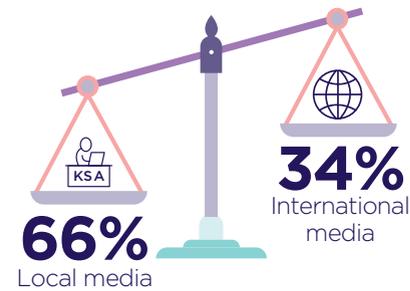
Trust in media, according to 2025 Edelman Trust Barometer*



* Figures for the UK and Japan are shown as global reference points, where trust in media remains considerably lower

Local media earns greater audience trust than international outlets

Two-thirds of Saudis reported that they trust local or national news sources more than international media, according to an online survey with 840 respondents in 2022. This highlights strong domestic credibility that supports higher audience engagement and advertising effectiveness. This trust advantage acts as a strategic asset, strengthening Saudi media's influence and competitiveness in regional information markets.



Why trust matters for media and advertisers

Higher trust levels strengthen the commercial environment by improving audience engagement, supporting advertiser returns and enhancing the investment attractiveness of Saudi media assets

Combating fake news and safeguarding information

Legal action

Fake news is a cybercrime with strict penalties

AI-powered detection

Pilot initiatives by MoM and Ministry of Interior are developing real-time misinformation monitoring*

Public reporting

Via channels like Absher and Ministry of Interior

Education

Media literacy integrated into school curricula to strengthen long-term resilience and content trust

*timelines and full implementation scope are yet to be confirmed at the time of writing (H2, 2025)

Gmedia's role in fostering media confidence and standards

- Structured licensing**: Promotes compliance and reduces investor risk by creating transparent market entry conditions
- Clear classification**: Supports consumer trust by validating age-appropriate and culturally aligned content
- Credible regulation**: Signals stability, underpinning audience growth and capital inflows
- Accountability and ethics**: Mandatory content standards and oversight mechanisms align with national media policies, promoting accuracy, cultural suitability and responsible reporting

Source: Edelman; Gmedia; National Platform; Online Journal of Communication and Media Technologies





Media sector transformation towards 2030

Saudi Arabia's media sector is entering a phase of transformation, with Vision 2030 targets and coordinated ecosystem reforms supporting progress. National KPIs and Gmedia's 2024-26 strategy underpin development, and progress supports national identity and reputation capital. Private sector players and small and medium-sized enterprises (SMEs) are supported by Monsha'at and local development authorities, reinforcing content creation, service innovation and community-level engagement despite ongoing financing and scaling constraints.

The sector's market value is forecast to exceed SR41bn (\$11bn) by 2030, per Gmedia, and employment is expected to reach around 150,000 by the end of the decade. The sector pursues a 75% local content ratio by 2030, in line with national cultural and creative industry targets. Regulatory reforms enable majority foreign ownership, while Gmedia's strategy for 2024-26 targets simplified licensing procedures – although implementation delays and overlapping approvals may still affect investor timelines. This transformation is also contributing to broader social development by expanding cultural participation, supporting creative expression and strengthening the role of media in community engagement. Growing participation in regional co-productions and the rising visibility of Saudi content are strengthening the Kingdom's reputational capital.

For investors, the combination of market expansion, supportive policy and favourable demographic factors offers wide-ranging opportunities across content, infrastructure and emerging technologies. Nonetheless, balancing regulatory oversight with investor confidence and private sector participation remains key to sustaining momentum to 2030 and beyond.

Shifting audience behaviors are reshaping content and monetisation

Saudi Arabia's media appeal is underpinned by a young, digital-native audience powering growth in streaming, gaming and UGC, with incentives supporting monetisation potential. Production, advertising and IP revenue help to attract investors, while piracy, inflation and adoption lags remain risks – although policy support and new SME financing schemes aim to help mitigate these headwinds. The market size is projected to reach SR41.3bn (\$11bn) by 2030, according to Gmedia analysis.

KSA media sector size forecast, 2025E-30F (SR bn)



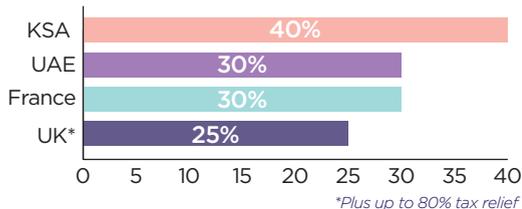
Market outlook and economic contribution



Media content and production

- **SR879m** (\$234m) Film Sector Financing Programme introduced by CDF in 2023
- **SR375m** (\$100m) Saudi Film Fund launched in 2024 (CDF + Middle East Financial Investment Company + Roaa Media Ventures)
- The sector is working towards a **75%** local content ratio by 2030, in line with national cultural and creative industry targets

Saudi film case rebates outpace peers



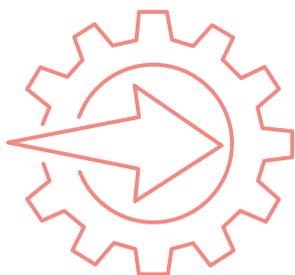
Investment appeal and entry opportunities

- Regulatory reforms permit majority foreign ownership
- Growth potential for PE/VC-backed early- and growth-stage financing
- Financial incentives for infrastructure, IP protection and talent development via IGNITE
- KSA's streaming market is structured across subscription video on demand (VoD), advertising-based VoD, transactional VoD and hybrid models. This highlights a shift from traditional single-model monetisation towards diversified revenue pathways.
- GCC telecom operators report returns of around **SR22.10** (\$5.90) for every **SR3.75** (\$1) invested in AI optimisation tools for marketing and customer value management. This signals strong revenue potential from personalised advertising.
- The ecosystem lacks specialised middleware platforms linking creators, publishers and advertisers. This limits seamless monetisation and campaign optimisation, yet also creates a gap for new entrants.

Emerging investment opportunities



Gmedia's strategic vision is designed to nurture ecosystem development



Gmedia is working to enable a transparent regulatory environment that supports market confidence and advances media-related Vision 2030 objectives

- **Modernised media law**
 Legislation being updated for digital, AI and new media trends
- **Private sector enablement**
 Clearer licensing and predictable content rules help to reduce uncertainty for private firms and enable smoother market entry
- **Coordinated governance**
 Clarification of roles among public entities to enable cohesive sector oversight
- **Streamlined licensing**
 Strategy for 2024-26 targets simplified procedures for various media activities

2024-25 progress reflects Gmedia's efforts to implement its strategic priorities

Talent development

Hosted an introductory workshop for the Waad Path scholarship programme, linking Saudi media professionals with leading global institutions

Content standards

Issued live broadcast regulations in a move to improve viewer experience, raise content quality and guide event organisers

Audience engagement

Published the Age Rating Standard Guide for Video Games to align content with public expectations

Investor interest

Number of foreign media companies operating in the Kingdom rose from two in 2024 to 17 in 2025

Innovation enablement

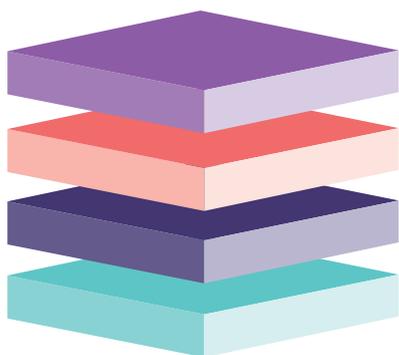
Expanding its role beyond regulatory oversight by digitalising licensing services, streamlining approvals and clarifying content standards to reduce administrative burden and support operational efficiency

Workforce mobility

Added 27 media-related professions to the premium residency programme to support skills development and international recruitment

Gmedia's short-term plan is designed to nurture ecosystem development

The authority's strategy for 2024-26 is built on four core objectives:



Catalyse sector growth

Become a leading media destination, attracting large players and developing talent and infrastructure

Improve regulatory framework

Update laws and establish an investor-friendly, one-stop-shop licensing regime

Safeguard consumers

Build and adopt monitoring mechanisms aligned with international standards to protect consumers effectively

Enhance efficiency

Become an effective organisation that can attract and retain top talent

Incumbent challenges

Regulatory overlap, and administrative bottlenecks can slow market entry. Meanwhile, balancing cultural oversight with investor confidence remains a key policy challenge shaping the evolution of the wider media ecosystem.

Gmedia metrics, 2025

3,403,177

Number of film licences, classification, posters and trailers

7133

Licences for films, games and media devices

5449

Licences and classifications of electronic games and their covers

2277

Items of media content produced

94,419

Registered media personnel

Source: Gmedia



Ecosystem roles and integrated players underpin sector progress

Saudi Arabia's media ecosystem is built on coordinated roles across public entities, investors, private firms and skills providers, each contributing to sector growth, regulatory clarity and investor confidence. Gmedia's sector development strategy supports KSA's wider creative ecosystem by providing insight and coordination that complement the roles of the MoC and CDF, among others. This helps to align media development with national cultural and creative objectives.



Public sector: MoM, Gmedia and MoC-linked commissions set policy, while SAIP and other regulators are working to enhance IP protection, competition and fiscal transparency. Complex approvals and overlapping mandates can still slow investor entry.



PIF: Funds flagship projects and identifies white-space opportunities, reducing risk for private players but creating some reliance on public funding



Private sector and SMEs: Supported by Monsha'at and regional authorities, firms drive content creation and innovation. Access to finance and scaling capacity remain notable SME constraints.



Skills development: Media firms, academies and universities expand the talent pipeline and align skills with market needs – reinforcing investor confidence in local capacity. **127** Saudis were trained in Q1 2025 by the Saudi Media Academy, with a further **40** to be trained under the Media Leaders Track.

Case study: Foaj Group – integrated communications and marketing alliance



Foaj Group is a communications and marketing alliance formed through the 2021 merger of three companies and officially launched in 2024 with the support of the MoM. As of 2025 Foaj brings together **13** specialised entities working within and beyond the Kingdom.



Integrated service offering

The group delivers end-to-end solutions – from strategy and creative development to media buying and public relations – providing clients with a single platform for their communication needs



Track record and national projects

By Q4, 2024 Foaj had completed **1000+** public and private projects for **600+** clients. Its portfolio includes work for the Saudi Space Agency's Saudi Towards Space campaign, the Internet Governance Forum, Founding Day, Ehsaan and Riyadh Season.



Technology and innovation

The group launched a **SR500m** (\$133 m) fund to invest in technology, AI and content development, reflecting its commitment to digital transformation



Talent and partnerships

Foaj employs **850+** people, over **80%** of whom are Saudi nationals. It operates a six-month graduate programme – with **65%** of participants hired internally – and a vesting initiative that has enabled **90+** employees to become partners in the organisation



Vision and outlook

Foaj plans to go public on the Saudi market in 2026-27 as part of its long-term growth strategy

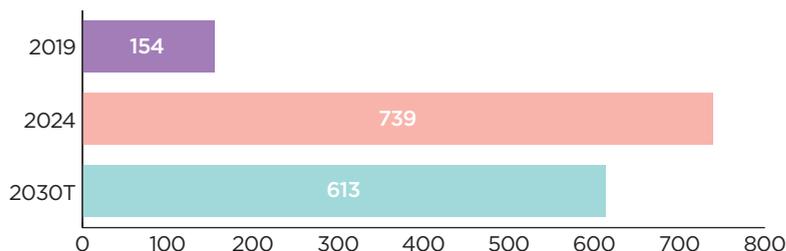


Vision 2030 goals are driving ecosystem growth and investor confidence

Saudi Arabia's media transformation is increasingly connected to wider Vision 2030 progress, with Gmedia coordinating regulatory clarity and content standards across culture, entertainment and technology. As these sectors advance, media is emerging as a strategic showcase of national development, strengthening how the Kingdom presents itself at home and abroad. Outcomes by 2024 indicate faster-than-planned growth and public engagement.

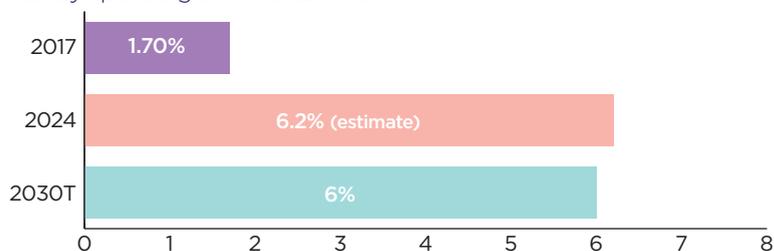
Venue infrastructure exceeded the 2030 target by 21% in 2024

Number of entertainment venues



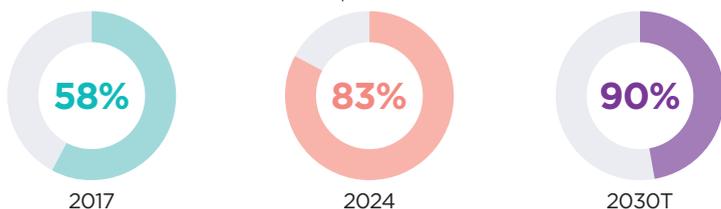
Entertainment spend likewise surpassed the 2030 target in 2024

Family spending on entertainment



The percentage of top global titles available is on track to achieve the 2030 aim

Share of top global titles (e.g., books, video games and films) in the market within three months of publication



Interview: Rawan Al Butairi, CEO, Saudi E-Sports Federation



Rawan Al Butairi

How is Vision 2030 shaping gaming and e-sports in the Kingdom?

AL BUTAIRI: Under Vision 2030, gaming and e-sports have become central to the Kingdom's media and entertainment strategy. What began as a fast-growing interest has evolved into a national priority, supported by investment in infrastructure, talent and international events. The National Gaming and E-sports Strategy – the first of its kind globally – sets clear targets: create 39,000 jobs and unlock an economic contribution of over SR50bn (\$13.3bn) by 2030. These goals are already being realised through flagship events such as the E-sports World Cup, the Saudi eLeague and the Saudi Fighting League – which attract global participation while showcasing Saudi players and creators. By integrating gaming and e-sports into the national entertainment calendar, we are helping to position the Kingdom as a leader and destination for competitive and interactive media.

To what extent is content and platform localisation in media and entertainment key for achieving Vision 2030 objectives?

AL BUTAIRI: Localisation ensures that content resonates with our audience and reflects our culture. This includes producing Arabic-first broadcasts, commentary and media assets for all major tournaments – from the Saudi eLeague to the Saudi Fighting League. We also encourage local gaming developers and content creators to produce culturally relevant storytelling that represents Saudi identity. A report we developed with Niko Partners found that over 75% of gamers value Arab cultural representation, and 41% are more likely to play games that feature Arabic localisation. By prioritising localisation, we not only enhance engagement but also build platforms that can connect with audiences across the Arab world and beyond – ultimately strengthening the Kingdom's position in the global gaming and e-sports industry.

Sector gaps and investment opportunities for 2026-30

Sector	Gap	Opportunity
 Video and streaming	Limited advanced production and post-production facilities	Develop large-scale studio complexes through giga-project partnerships
	Shortage of specialised technical and creative talent	Expand skills pipelines through academies, scholarships and global training partnerships
	Low share of Saudi Arabic content on global platforms	Scale domestic Arabic content production and secure co-production agreements with global streamers
 Audio	Insufficient modern recording facilities and audio-engineering talent	Increase studio capacity and expand audio-focused training programmes
	Fragmented rights-management systems limiting monetisation	Modernise rights-management and introduce digital royalty automation
	Podcasts and audio formats lack clear revenue models	Build diversified monetisation pathways across streaming, live events and branded content
 Publishing and digital media	Fragmented retail and limited nationwide distribution	Widen digital publishing, e-book platforms and print-on-demand channels
	Shortage of export channels for Saudi content	Build regional distribution partnerships for Arabic literary and educational content
	Capacity and quality constraints in translation	Strengthen translation pipelines through national programmes and AI-assisted tools
 Gaming and e-sports	Limited local game development and publishing capability	Support domestic studios and attract global publishers
	E-sports infrastructure concentrated in major cities	Build regional e-sports venues and production stages aligned with NGES goals
	Lack of localisation and middleware services	Develop middleware platforms to improve monetisation and distribution
 Advertising and marketing	Heavy dependence on foreign digital platforms causing revenue leakage	Expand domestic ad-tech solutions and strengthen local analytics capability
	Performance analytics and audience measurement tools not yet fully leveraged	Invest in AI-enabled optimisation and real-time measurement systems
	Lack of middleware linking creators, advertisers and publishers	Establish creator-advertiser marketplaces to streamline monetisation and campaign delivery
 Cross-sector ecosystem	Talent supply not keeping pace with sector growth	Nurture specialised media curricula and professional training pathways
	Limited financing tools for creative SMEs	Expand blended finance instruments and targeted media funds
	Uneven infrastructure and gaps in IP enforcement	Strengthen IP governance and invest in infrastructure across the Kingdom through public-private collaboration



Summary and conclusions

The Kingdom's media sector continues to expand, supported by Vision 2030 reforms, rising local content demand and a mobile-first, young population. With GDP contribution set to increase from SR16bn (\$4.3bn) in 2024 to SR47bn (\$12.5bn) by 2030, the sector's trajectory underscores its growing role in supporting diversification, transformation and employment. As Saudi content gains visibility across regional platforms, the sector is also strengthening national identity and extending the Kingdom's cultural influence across the Arab world. Sentiment indicators suggest that 66% of Saudi audiences trust local media over international outlets, reinforcing the sector's credibility and signalling a supportive environment for long-term investment.

Investment opportunities span the full value chain – from content creation and post-production to technology platforms, event management and creative infrastructure. The expanding influence of gaming, streaming advertising and live entertainment reflects the sector's cross-cutting importance to cultural participation and youth engagement.

Nonetheless, challenges remain – from skills shortages and monetisation gaps to regulatory execution and market maturity. Achieving success to 2030 will hinge on policy consistency, talent development, ecosystem coordination and robust IP enforcement to translate strong foundations into long-term, inclusive growth and sustainable investment returns. Beyond 2030, ongoing innovation, skills development and investment alignment will remain essential to sustaining momentum in the Kingdom's evolving media landscape.

Saudi media: growth outlook, enabling reforms and investment prospects

Market trajectory

- Market size forecast to reach **SR41.3bn** (\$11bn) by 2030, with **9% CAGR** from 2025-30
- GDP contribution to triple from **SR16bn** (\$4.3bn) in 2024 to **SR47bn** (\$12.5bn) by 2030
- Employment forecast to more than double – reaching **150,000** jobs by the end of the decade, up from **67,000** in 2024
- Cross-sector linkages between media and tourism are increasingly evident, with large-scale film, entertainment and cultural events generating positive spillovers for the hospitality, travel and retail sectors

Enabling ecosystem

- Gmedia and MoM foster transparent, investor-friendly regulation (e.g., age ratings, AMR revamp and Mawthooq); PIF entities (e.g., SEVEN, Savvy Games Group and NEOM) drive infrastructure development and innovation
- **40%** film production rebate, slate financing and licensing reform efforts aim to strengthen sector appeal
- AI and data-analytics are expected to enhance content localisation and improve audience targeting as the sector scales
- Gmedia's strategic approach involves structured analysis that informs policy alignment across media, culture and creative industries

Investment momentum

- KSA is a **top** G20 growth market for media and entertainment, with 2024-29 growth expected to outpace the global average (**8.2%** vs **3.7%** CAGR)
- Public-backed VC funds signal institutional support for media investment
- Challenges remain: fragmented regulation, monetisation inefficiencies, IP enforcement gaps and talent shortages in areas such as VFX and commercial strategy may limit investor confidence
- The media sector offers broad value-chain depth, spanning content, advertising, platforms and IP – presenting scalability and diversification potential for investors

Scalable opportunities

- Untapped potential spans content creation, post-production, monetisation models and technology platforms
- Gaming and e-sports aims to unlock an economic contribution of **SR50bn** (\$13.3bn) and support **39,000** jobs by 2030
- Other high-growth segments include OTT, cinema and live audio events, driven by localisation, digital adoption and international partnerships
- Saudi Arabia's integrated approach to regulation, investment and talent development increasingly presents a regional benchmark for comprehensive media reform



Abdulatif bin Mohammed Al-Abdulatif, CEO, Gmedia



Abdulatif bin Mohammed
Al-Abdulatif

Which key factors position Saudi Arabia as an appealing destination for media investment within the region?

AL-ABDULATIF: The Kingdom is not just an emerging market for media but a central destination for media investment across the region, enabled by a unique combination of political, economic and technological factors. Saudi Arabia's digital infrastructure is among the strongest in the region, with extensive 5G coverage, digital platforms and audio-visual content consumption. This creates fertile ground for media production and efficient, rapid distribution.

Internet penetration of 99%, over 37m users, and online video consumption position the Kingdom as a golden market for digital content and interactive streaming. This is complemented by a young demographic eager for experimentation and innovation - ready to consume and engage with fresh, diverse content, ranging from podcasts and cinema to e-sports and interactive media. Moreover, legislative and regulatory reforms are opening new horizons for investors - offering incentives, exemptions and an innovation-friendly framework that fosters partnerships with the private sector.

Where are the incumbent challenges to growth in the sector and what is needed to overcome these?

AL-ABDULATIF: Despite strong momentum, Saudi media faces challenges that must be addressed to achieve Vision 2030 aims - presenting opportunities to spur innovation and strengthen national capabilities. These include a shortage of specialised national talent in digital media and content creation: despite local training programmes, the industry requires a comprehensive national framework for developing media talent. Limited funding for emerging media projects

is another challenge. There is a pressing need for specialised funds in digital media and government incentives for start-ups, especially those focused on creative technologies such as content driven by artificial intelligence (AI). Weak integration between local platforms and international standards also presents a headwind as of 2025. Saudi media companies may struggle with cross-border content distribution due to gaps in technical standards, digital rights and intellectual property protection. A balanced regulatory framework is needed to safeguard local priorities while embracing global openness to ensure Saudi content reaches international markets.

How would you describe the outlook for the Saudi media sector in the years leading up to 2030?

AL-ABDULATIF: I expect a comprehensive transformation across structure, content and influence. The sector is moving towards becoming more professional, more digital and more global. I anticipate that local content will dominate by 2030. Streaming platforms in the Kingdom show a preference for local content whenever it is available at competitive quality.

This evolution requires a local production ecosystem capable of creating diverse content, in multiple languages and dialects, that speaks to domestic audiences and reaches the world. AI will become integral at every stage - from scriptwriting to editing and audience analytics. Saudi companies are already pioneering smart analytical tools to understand viewer behaviour and enable real-time engagement. By attracting global production companies and establishing competitive infrastructure, the Kingdom is strongly positioned to become the Hollywood of the Middle East by 2030.



Key takeaways

STRONG FUNDAMENTALS

Saudi Arabia's media sector is expanding rapidly, supported by Vision 2030 reforms, digital adoption and rising private participation. The sector's contribution to GDP is forecast to rise from SR16bn (\$4.3bn) in 2024 to SR47bn (\$12.5bn) by 2030, according to Gmedia. This reflects a broader cultural transition, supported by expanding creative capabilities and a growing pipeline of Saudi-produced content across film, gaming and digital media. However, progress depends on overcoming capacity gaps in content production, skills shortages and uneven regional infrastructure. This may present investment opportunities as the Kingdom transitions from early-stage expansion to a more internationally competitive and culturally influential sector, aligned with Saudi Arabia's long-term creative vision and modern national identity.

INVESTMENT- READY ECOSYSTEM

Transparent regulation and streamlined licensing support market entry and investor confidence. Public investment via PIF and IGNITE is catalysing innovation, while PE and VC activity is expected to increase. However, regulatory enhancement and enforcement remain critical to sustain momentum. As frameworks mature, investors may benefit from increasing clarity in licensing, IP protection and data governance – which are key to long-term sector resilience. These regulatory improvements also enable creators to commercialise Saudi identity more effectively, elevate production values, and develop content that strengthens the Kingdom's global image and cultural influence.

EMERGING OPPORTUNITIES

High-growth segments such as film, gaming and e-sports, and ad-tech and streaming, present scalable opportunities for local and foreign investors. Demand for Arabic-language content and immersive formats supports revenue diversification. This reflects the evolution of local identity and a national ambition to share authentic Saudi narratives with regional and global audiences, reinforcing the Kingdom's positioning as an emerging cultural influencer. However, monetisation models and access to private capital are still developing. Early entrants can help to shape ecosystem maturity – leveraging first-mover advantages while navigating operational and talent-related constraints. Together, these dynamics position the sector for continued growth beyond 2030. They also support Saudi Arabia's ambition to emerge as a leading regional media powerhouse that advances both economic diversification and cultural diplomacy.



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