

Inside the Whales Den:

A Closer Look At the Saudi Games Market

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Saudi Market Fact Sheet



2nd globally



21% of pop



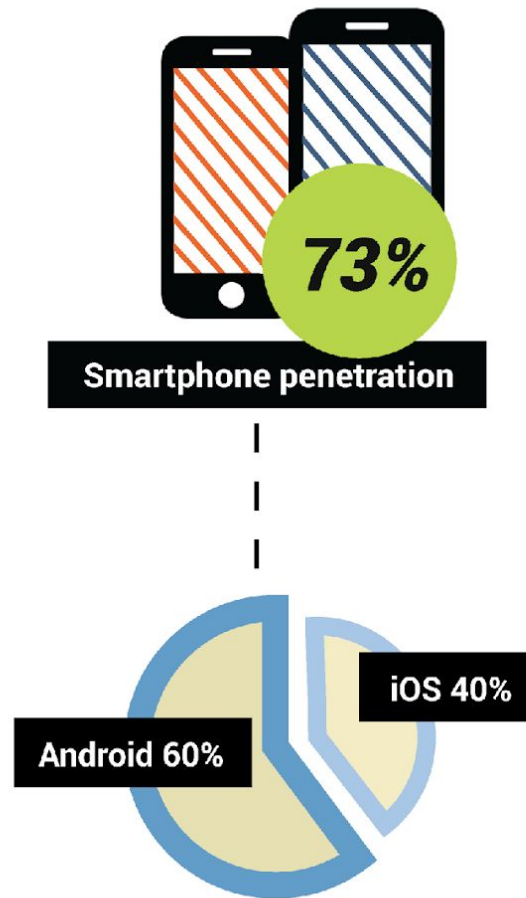
19% of pop

YouTube

Highest no. of views/user



Saudi Market Fact Sheet

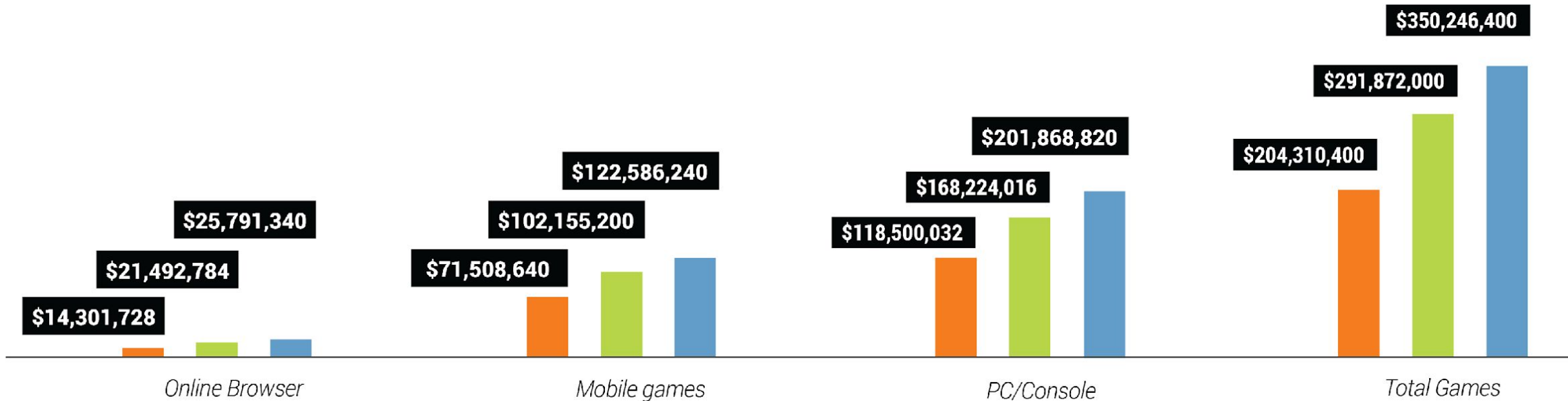




Saudi Games Market Estimates

2016 ■
2015 ■
2014 ■

Ranked 27th in the world in game revenues (Newzoo)
13% CAGR between 2014-2019 (strategy&)
Compared to 8% Global CAGR (Newzoo)

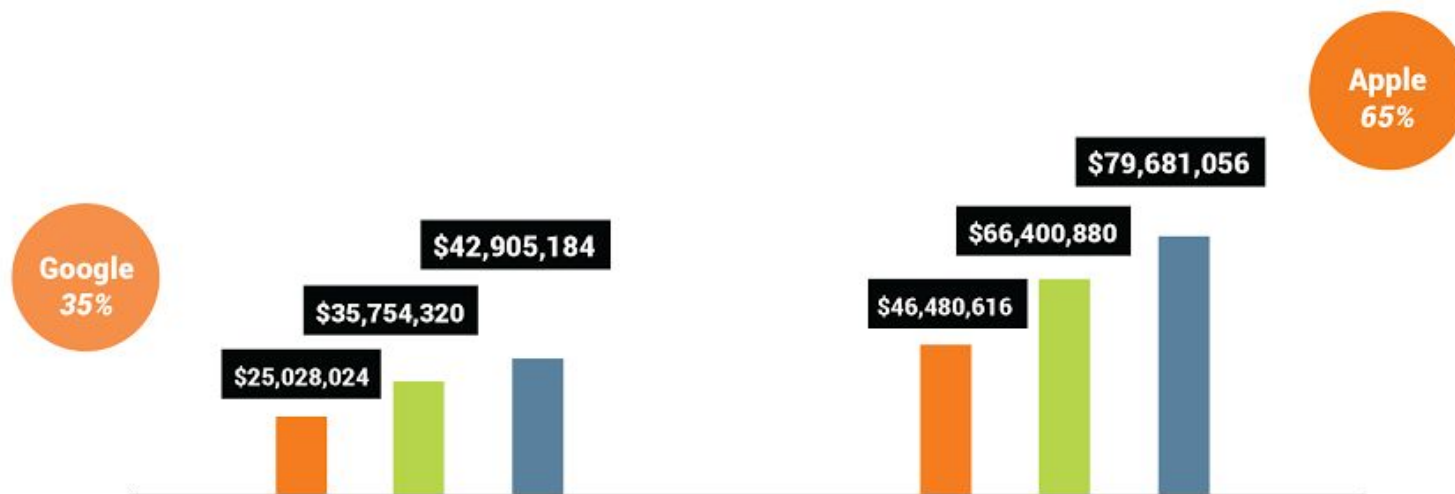




Apple vs. Google

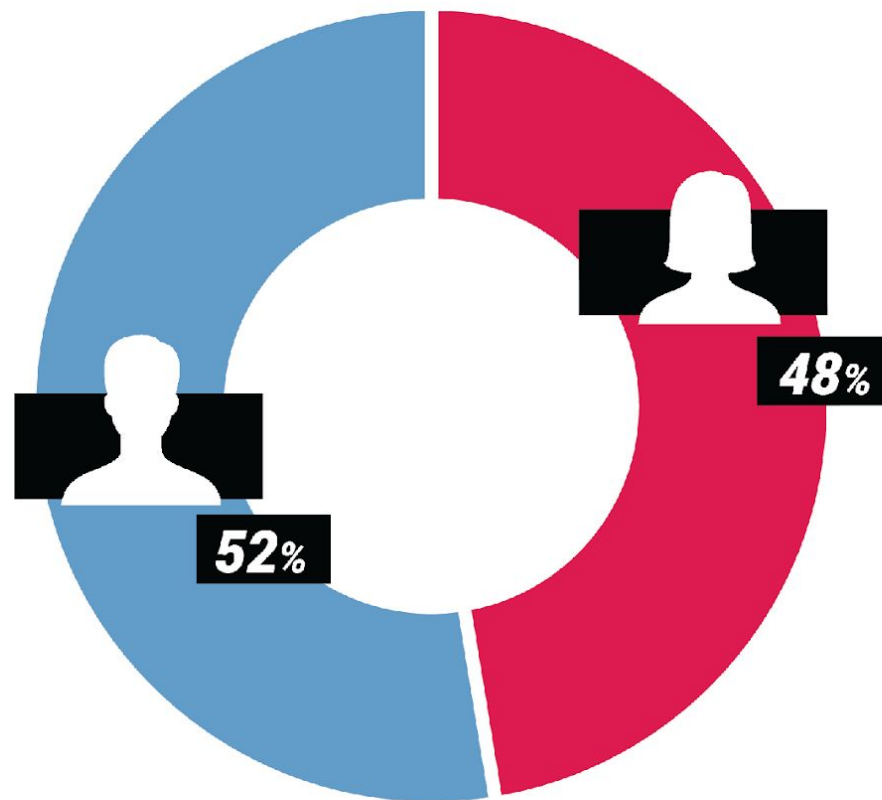
2016 ■
2015 ■
2014 ■

**18% CAGR between 2014-2019 (strategy&)
Compared to 16% Global CAGR (Newzoo)**





Mobile Gamer Survey – 1,579 completes





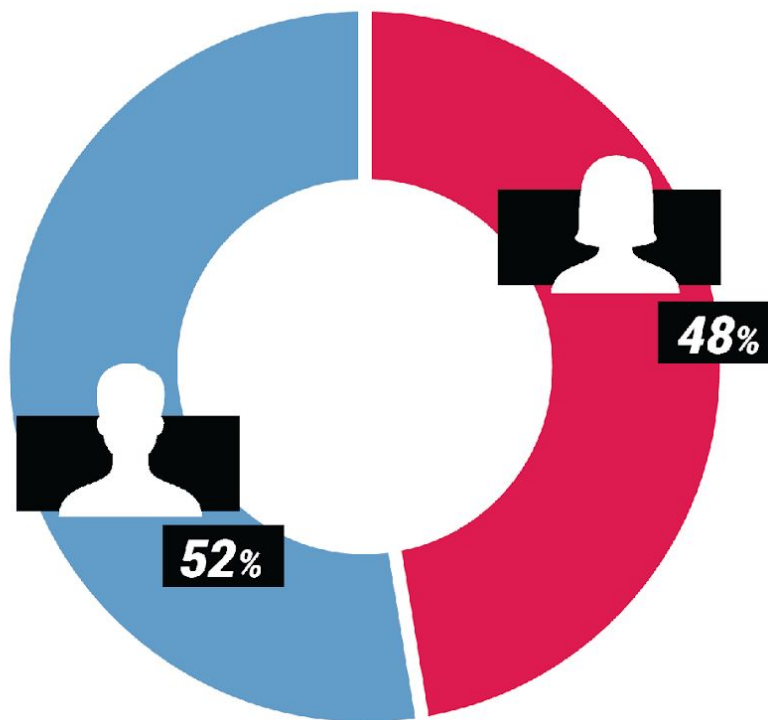
Male age groups

8.9% <18
16.6% 18-24

41.7% 25-34
21.9% 35-44

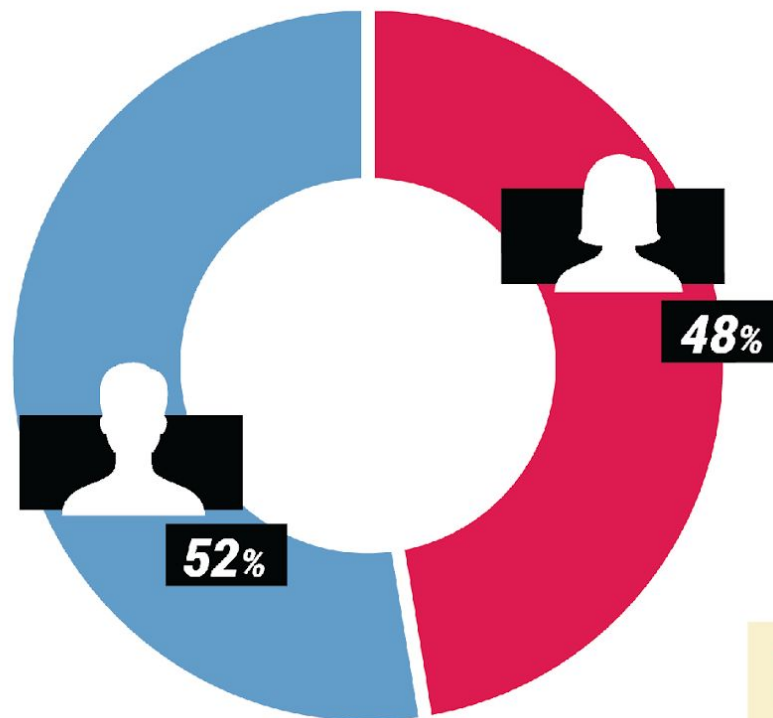
8% 45-54
3% 55+

38.8% Single
54.6% Married





Female age groups



16.8% **30.5%**
<18 **18-24**

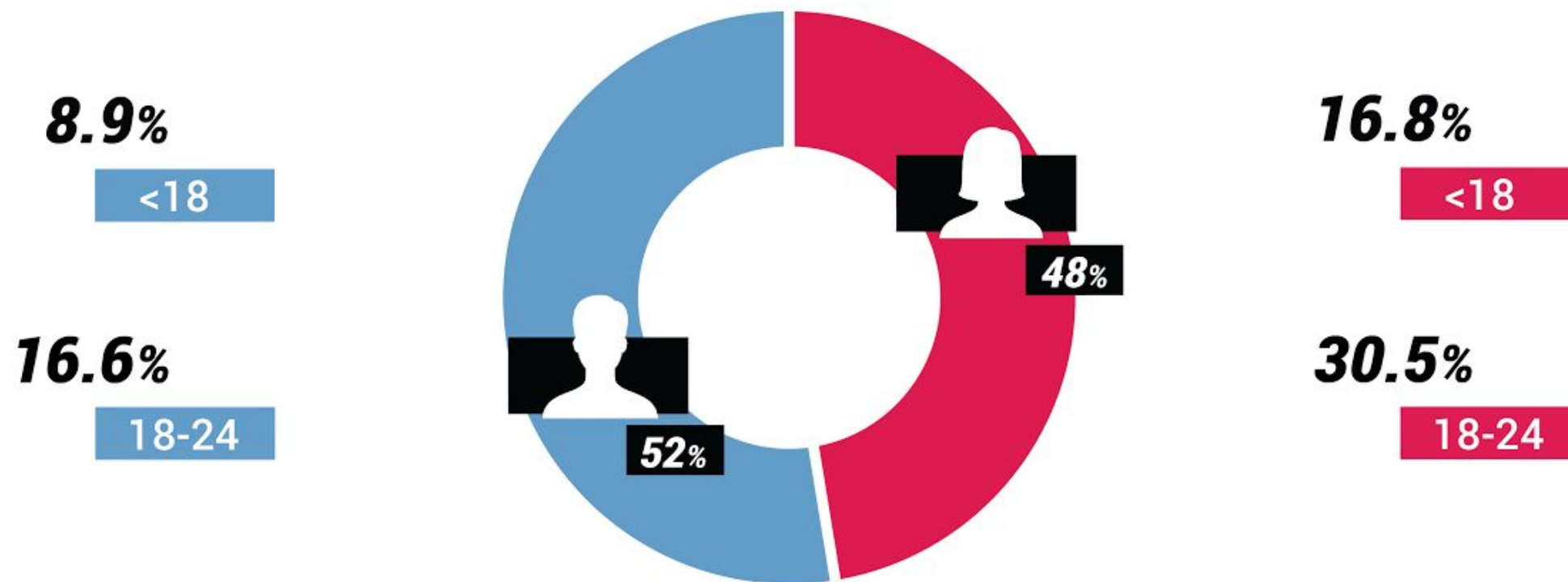
33.9% **14.4%**
25-34 **35-44**

3.9% **0.6%**
45-54 **55+**





Male vs. Female – age groups





Male education & employment

37.6%

Bachelors Degree

24.5%

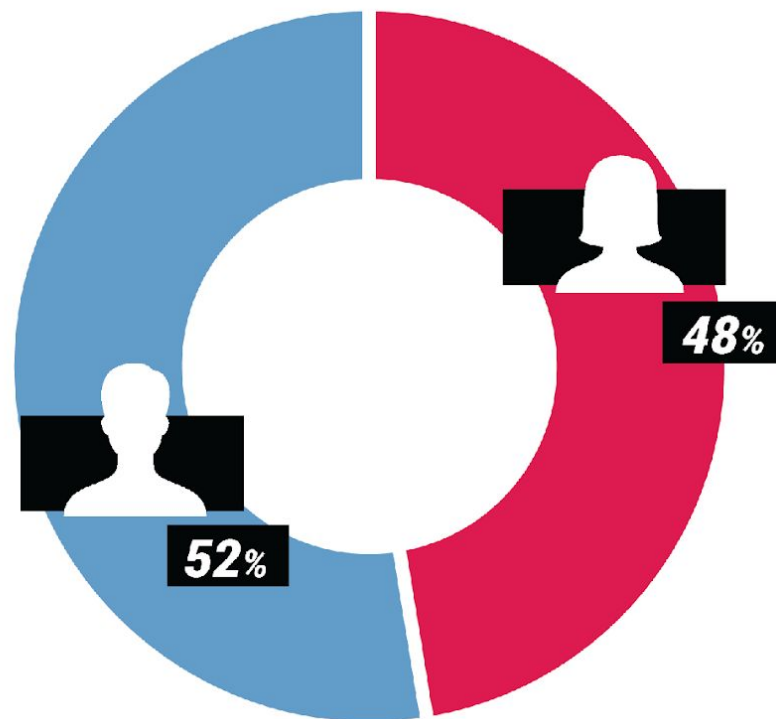
Less than Diploma

66%

Employed (full-time)

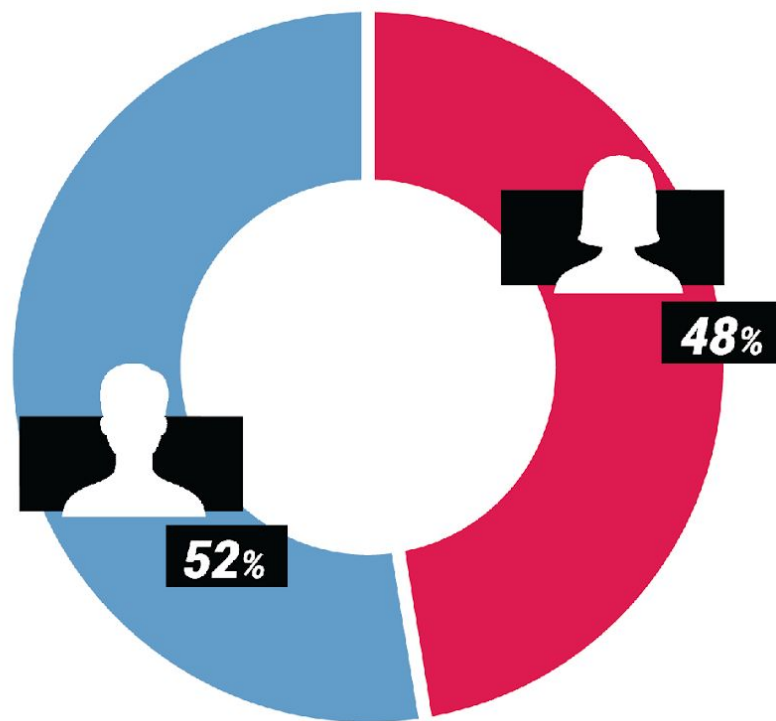
15%

Unemployed/student





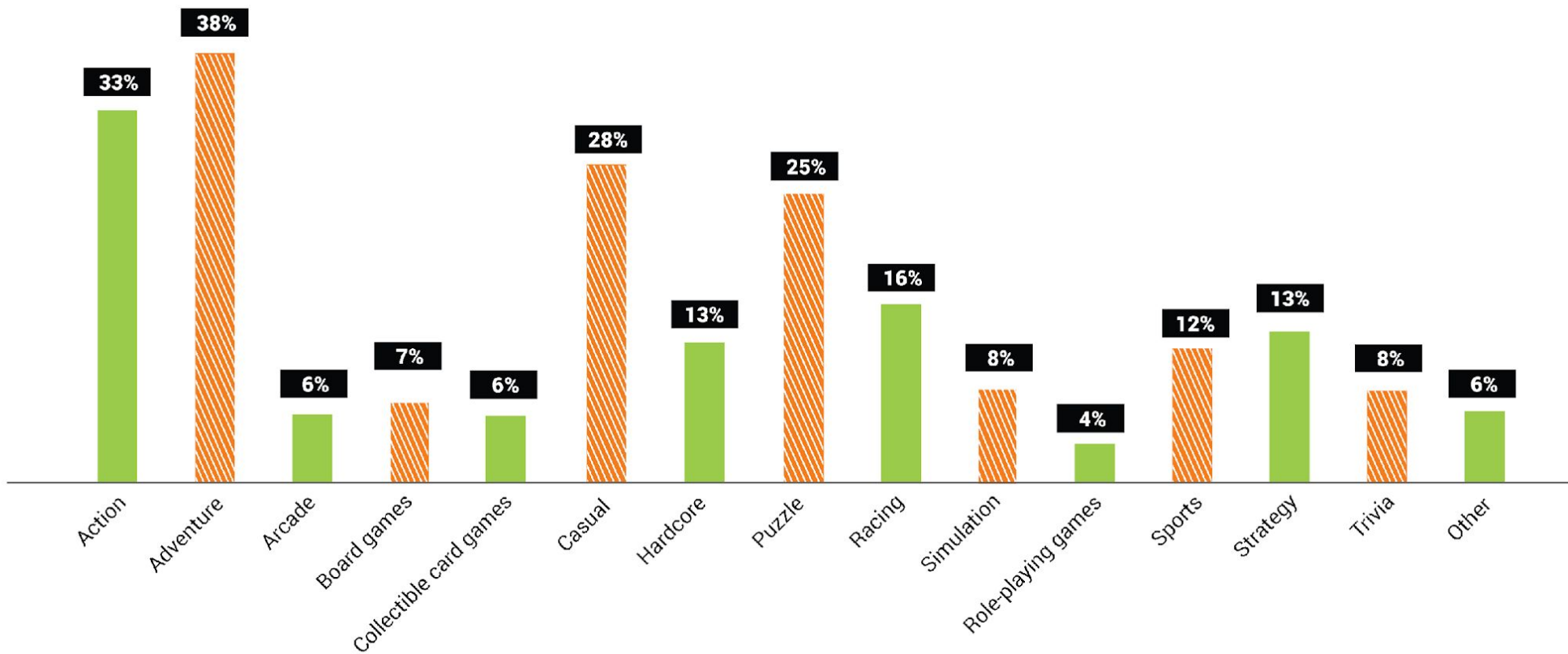
Female education & employment



Top target groups

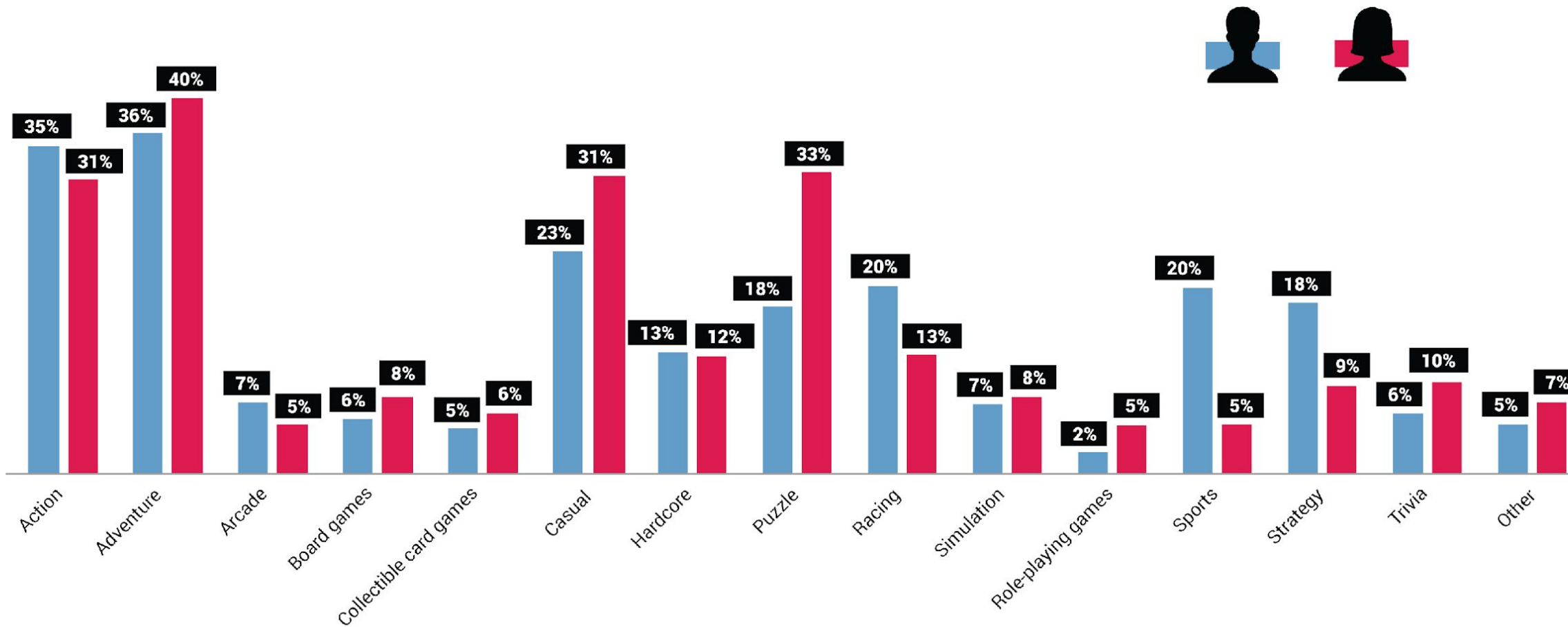


Game genres



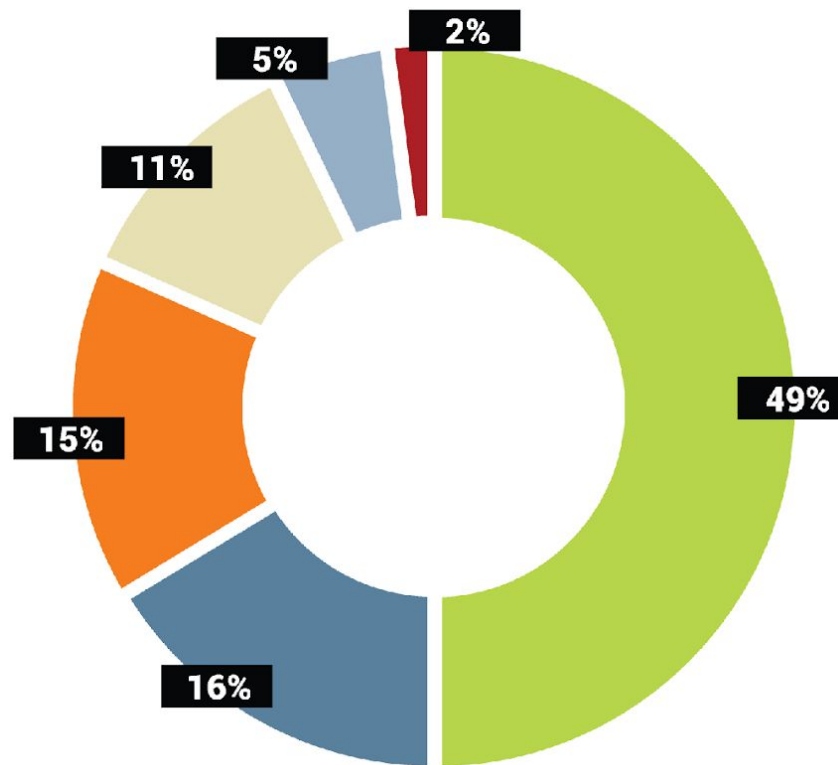


Game genres – Males vs Females





Gaming Frequency

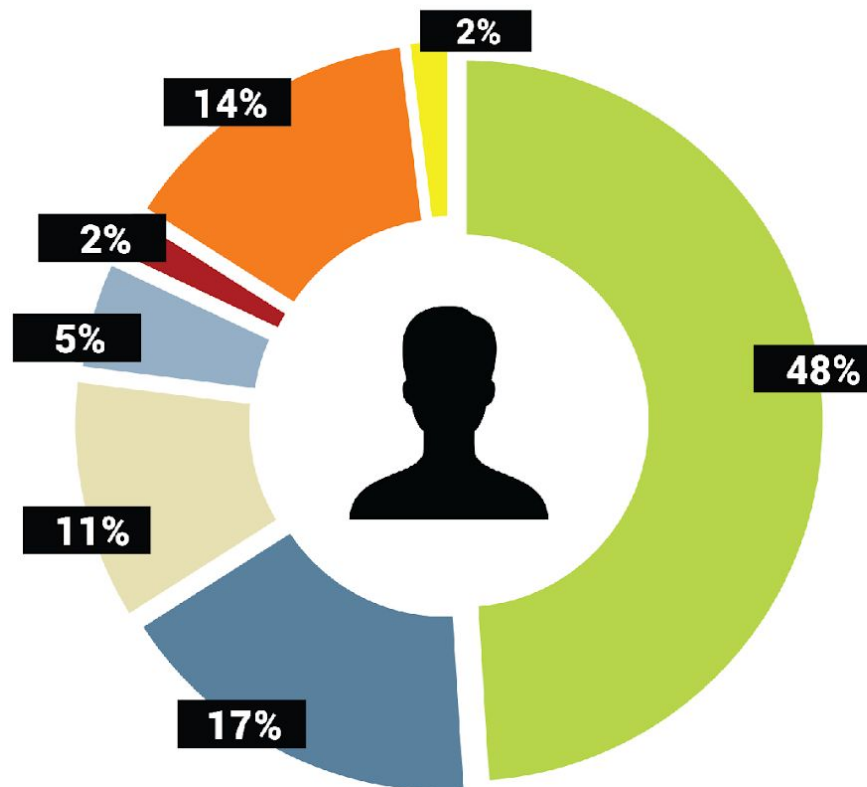


- Several times a day 
- Once a day 
- Rarely 
- Few times a week 
- Weekly 
- Monthly 



Gaming Frequency - Male

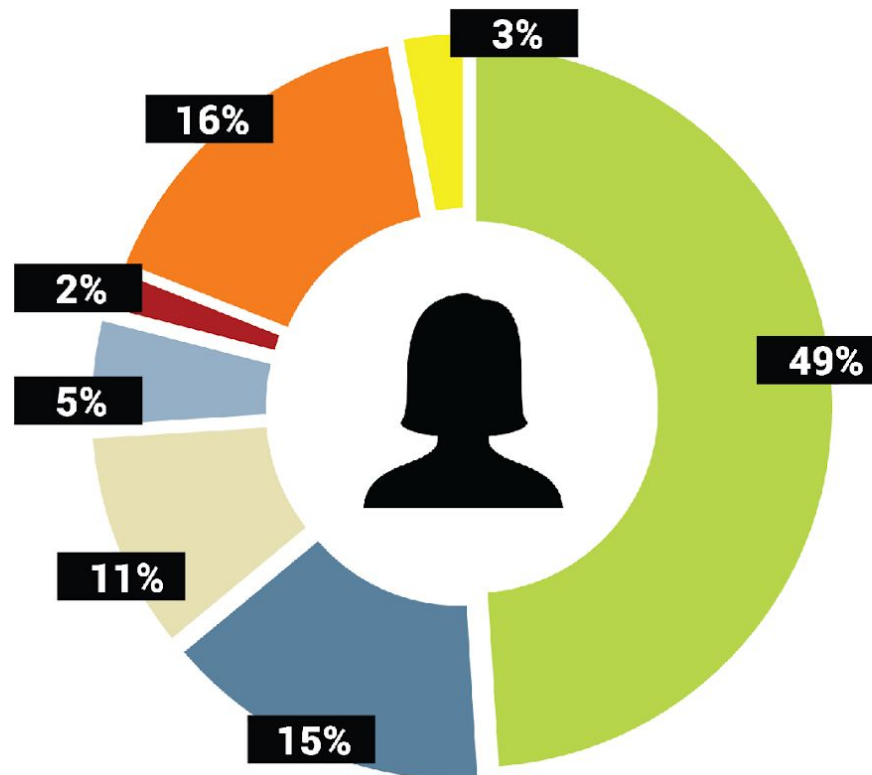
- Several times a day
- Once a day
- Few times a week
- Weekly
- Monthly
- Rarely
- Never





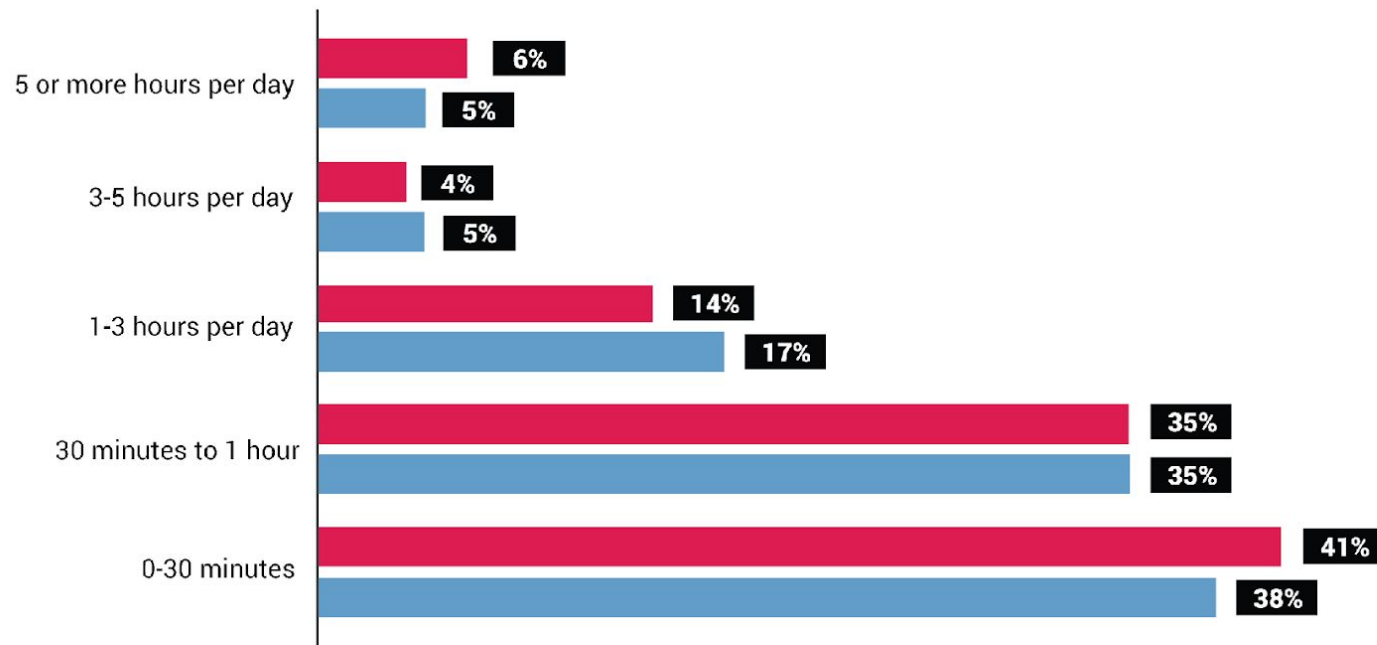
Gaming Frequency - Female

- Several times a day
- Once a day
- Few times a week
- Weekly
- Monthly
- Rarely
- Never



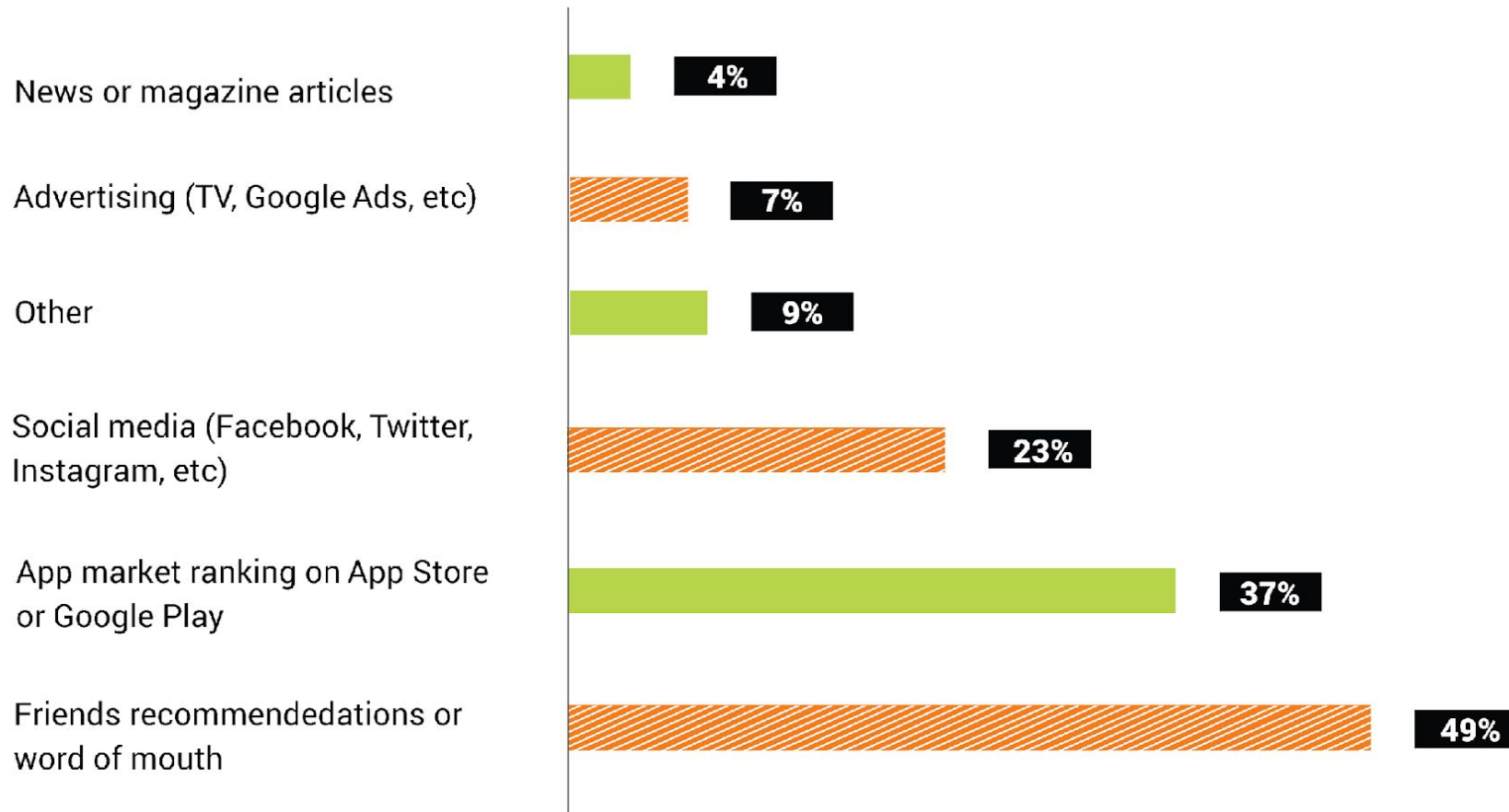


Game duration – Male vs Female





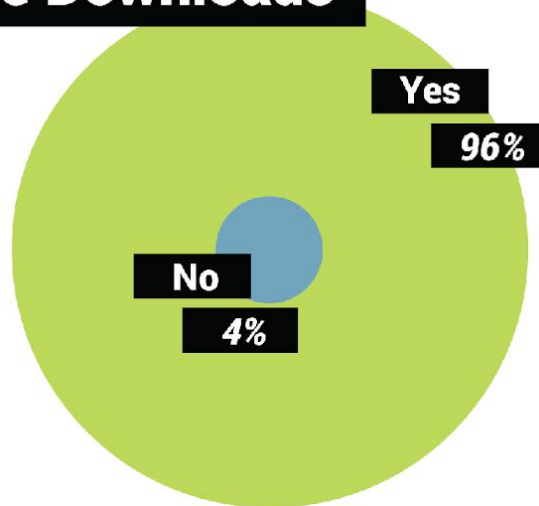
Influences to download and play



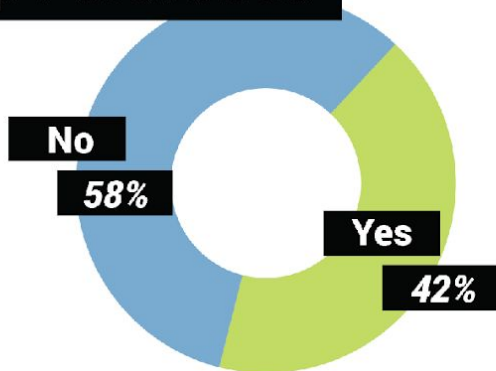


Download types

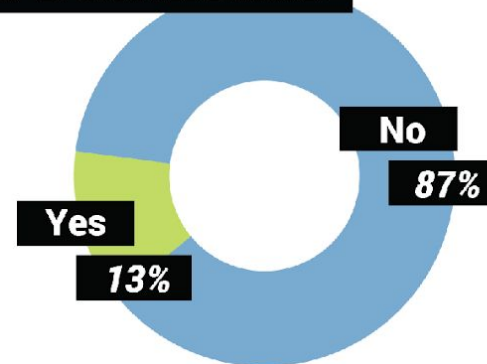
Free Downloads



In-app Purchases

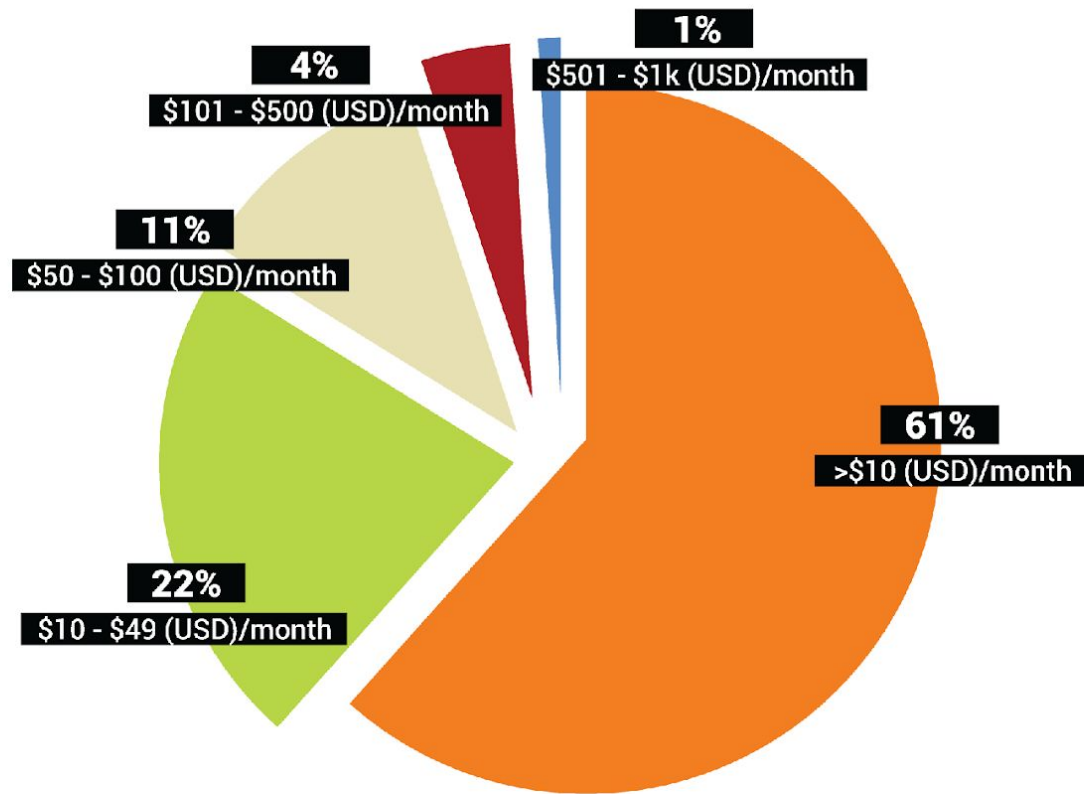


Paid Downloads



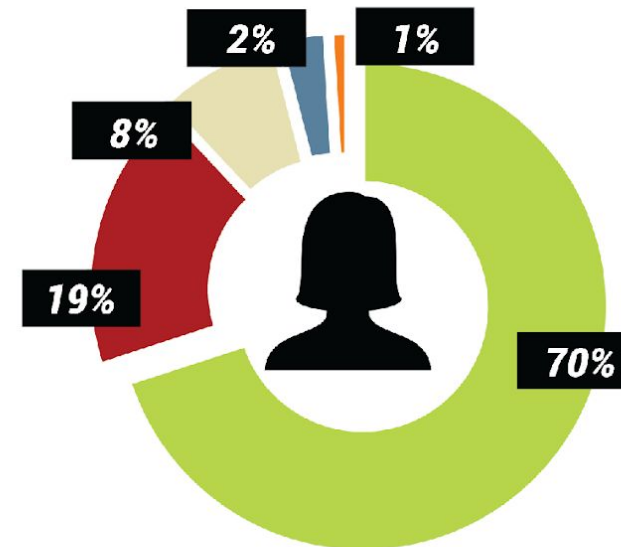
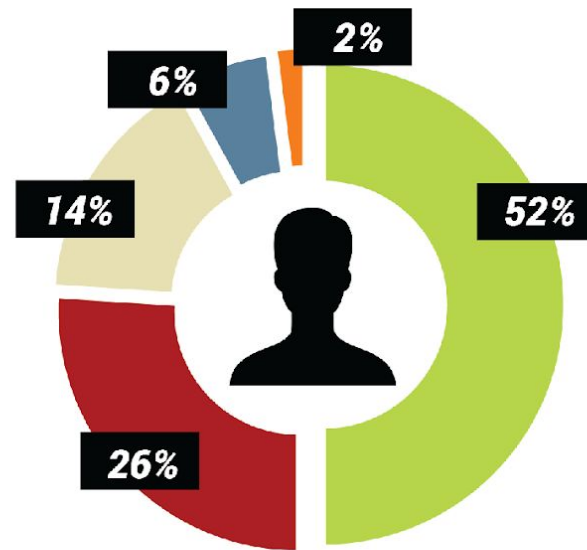


In-app purchases





In-app purchases – Male vs Female



< \$10 (USD)/month



\$10 - \$49 (USD)/month



\$50 - \$99 (USD)/month



\$100 - \$499 (USD)/month

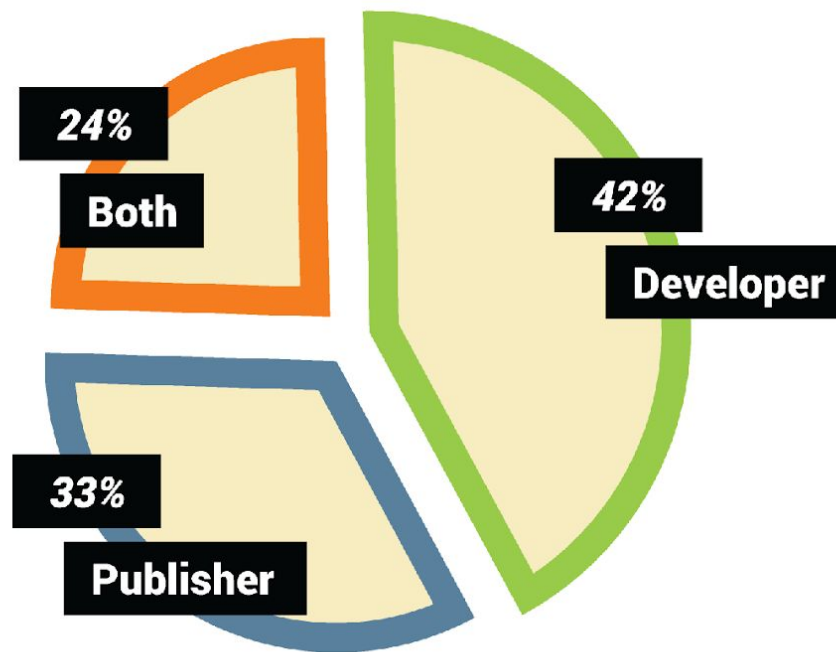


\$500 - \$1k (USD)/month



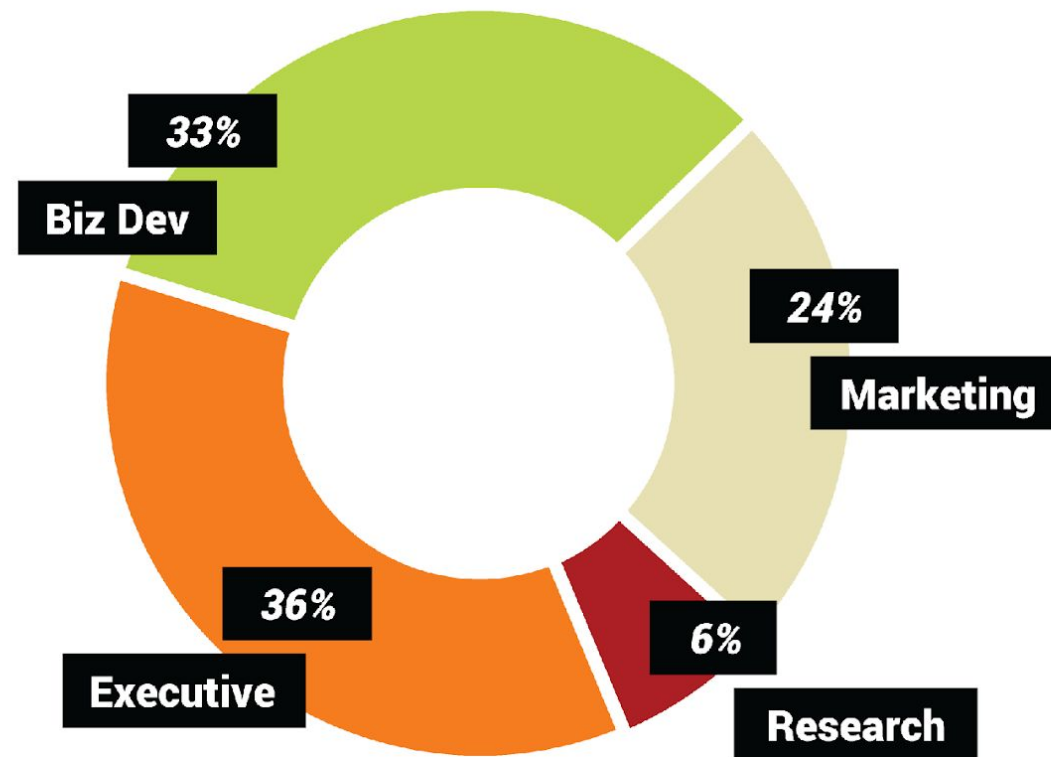


B2B Publisher Survey



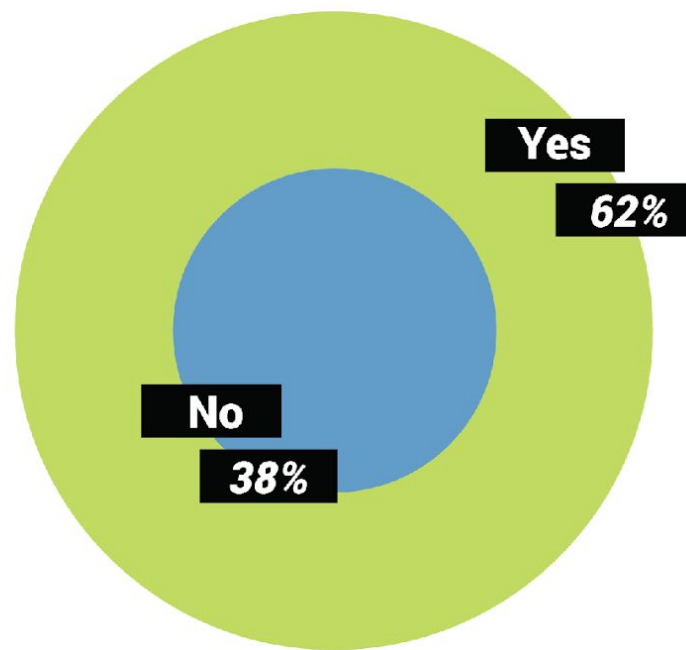


Position at company



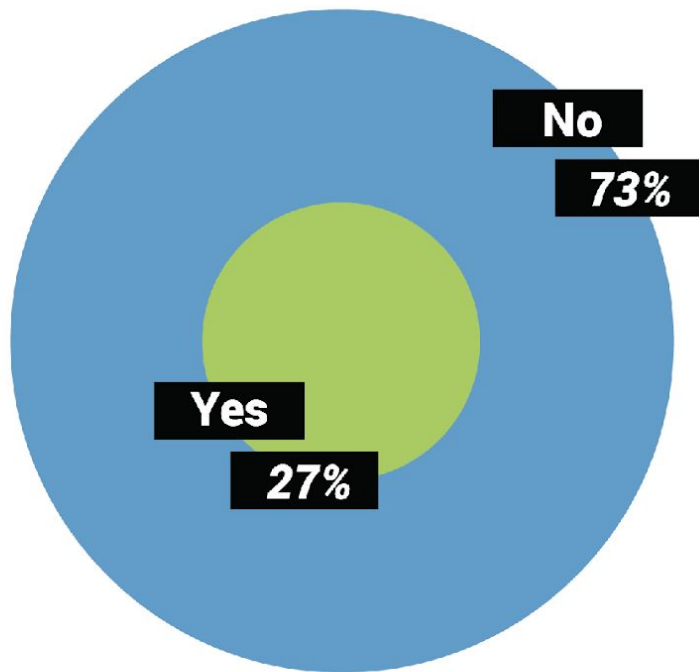


Focus on new titles in 2016





Faced marketing challenges?



Rank	Genre
1	Strategy
2	Sports
3	Role-playing games
4	Casual
5	Action
6	Puzzle
7	Racing
8	Hardcore
9	Board games
10	Trivia



On the ground facts

1

Majority of mobile game hits in Saudi are not targeted particularly to the KSA market.



On the ground facts

2

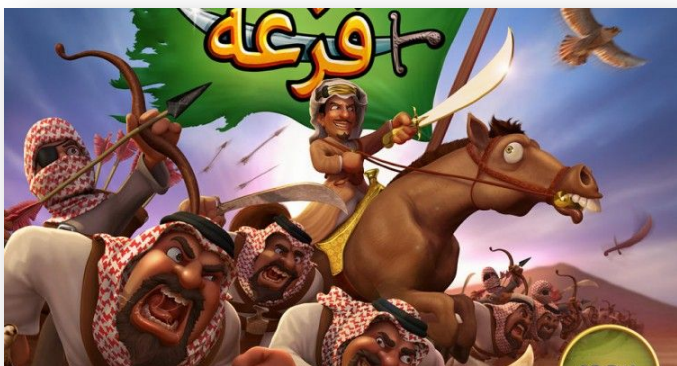
The downloads come from the global gate, i.e the CPD campaigns are run on a global scale and splash to local audiences without localisation.



On the ground facts

3

In the case of Tribal Rivals: taking advantage of low prices on Twitter when it first opened its ad services.



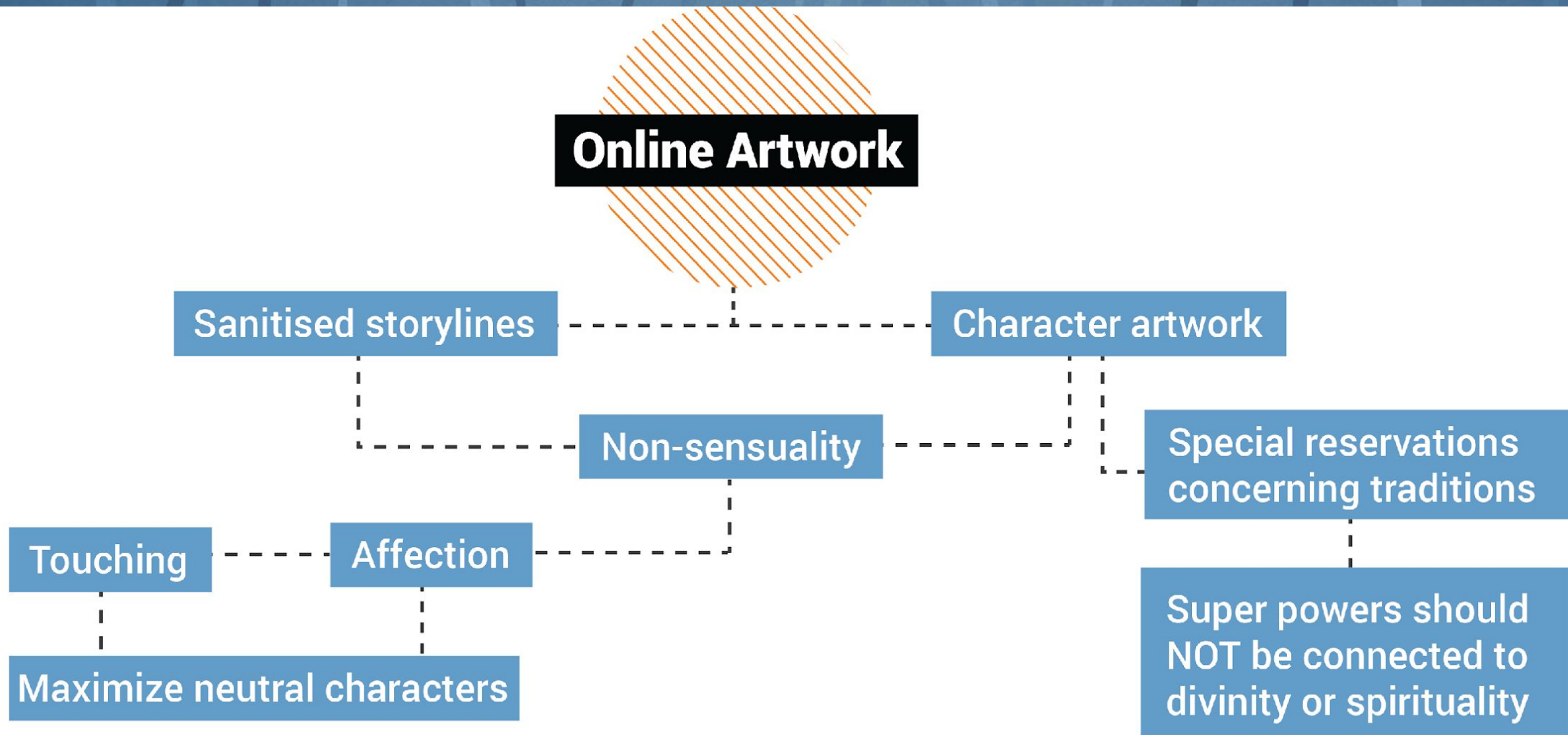


On the ground facts

- 4** Local-based titles typically do not experiment as widely with CPD and focus on local media. They may or may not work but are in most cases not scalable.



Islamic content guidelines





No need to over-localise

1

Right-to-left orientation is nice-to-have, but not mandatory

2

Neutral characters work best

3

Sexuality is a no-no



No need to over-localise

4

Avoid religion and divinity but don't get too paranoid

5

Pay attention to Saudi lingo

6

Don't get carried away with local attire and landscapes



Unique marketing conditions

1

App Annie only sees half the landscape

2

Target 100% Arabic sites

3

Pay attention to social media influencers like Saudi Gamer on YouTube