



The MENA Games Market: From Sand to Stardom

Next World Forum

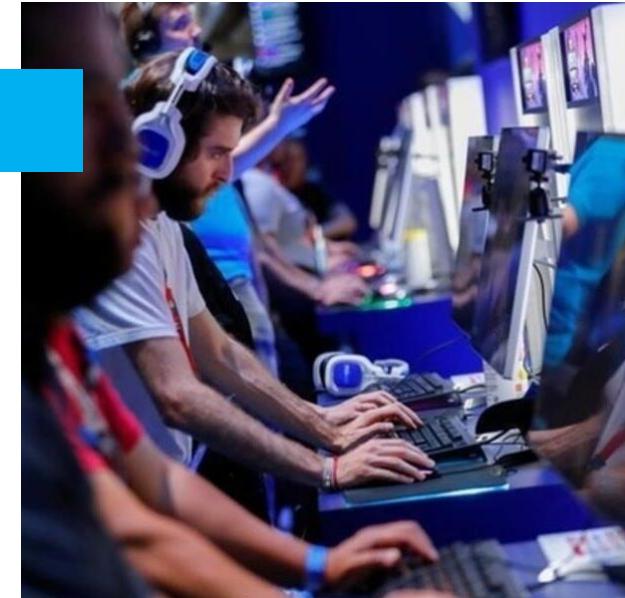
Riyadh, KSA

August 30-31, 2023

Lisa Cosmas Hanson, CEO and President

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People are People

- Social interactions
- Teamwork
- Community building

\$1.8 billion

MENA-3 Games Revenue (2022)

67.4 million

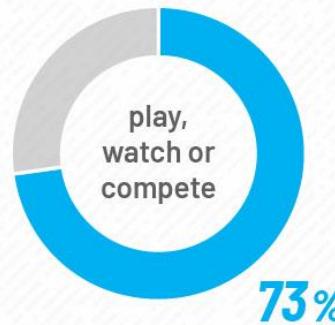
MENA-3 Gamers (2022)



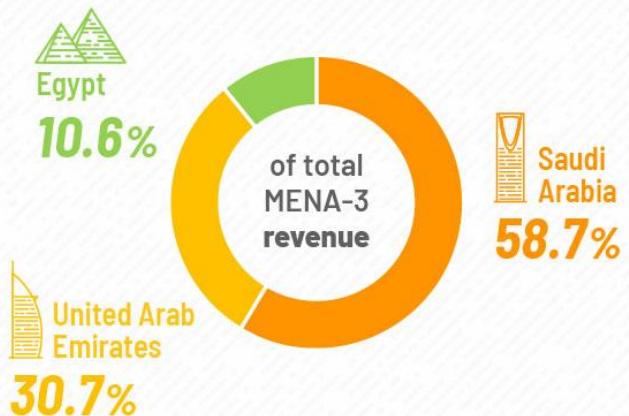
THE MENA-3 GAMES MARKET



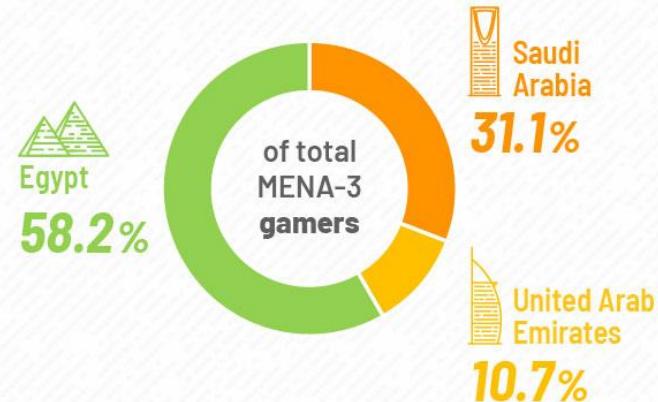
ENGAGE WITH ESPORTS



2022 REVENUE



2022 GAMERS



GAMERS



GAMES REVENUE



MENA-3: Saudi Arabia, United Arab Emirates, Egypt (2022 and 2026 data are estimates)

Games Revenue: Gamer spending on video games Mobile, PC and Console, excludes ad revenue

Gamers: An individual that has played on a PC, mobile or console for a minimum of 60 minutes in the past 30 days

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MENA-3 BY SEGMENT



KSA



UAE



Egypt



GAMERS



GAMES REVENUE



NIKO•

Global Gaming in Numbers

2022



MENA's Gaming Industry on the Rise.



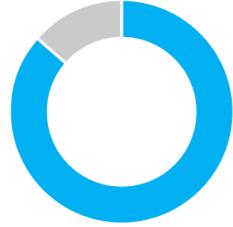
\$175.7 billion

Global games revenue

3 billion

Total gamers worldwide

Think Globally, Act Locally



86.6%

of MENA gamers believe
Localization is important



Language most
important localization



Preserving MENA
Culture & Values



Local workforce training
by foreign companies

سعادة ←

Arabic localization
challenge



Homegrown MENA
Games & Gamedevs

Increased Localization & Culturalization



9th Century Baghdad setting & Famous Actors as VO



Rashid
(Street Fighter 6)



Valorant Anthem in Arabic



Poor localization on Hitman 3



Collaboration with Egyptian singer Mohamed Ramadan



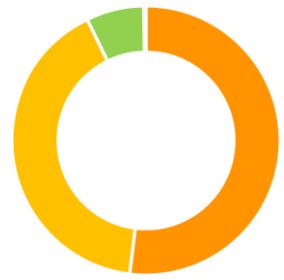
Battlefield 4's in game text isn't Arabic!

PUBG in MENA

Case Study in Successful Localization



Gross revenue



Downloads



KSA



UAE



Egypt

PLAYERUNKNOWN'S
BATTLEGROUNDS
MOBILE



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



Collaboration with MENA celebrities & entertainment platforms



PUBG is also the most popular PC game

Public Sector Investment & Government Support



Investment



\$37.8 billion



Strategic Growth



Gaming companies
250



home-grown
games to become
top 300
30+



number of esports
athletes per capita
Top 3



esports event
host country
#1

Building a Game Company Portfolio



Sixth largest M&A deal



High-profile portfolio

Nintendo

CAPCOM®



ACTIVISION
BLIZZARD

T2™
TAKE-TWO
INTERACTIVE

ncSOFT®

SNK®

Esports in KSA and MENA 2022



31.2 million
esports viewers



\$48.9 million
esports revenue



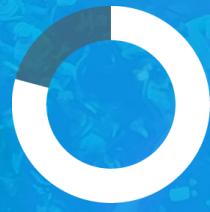
73%
MENA gamers
engage with esports



\$500m
esports city
in Riyadh



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



79.3%
total prize pool
across all platforms

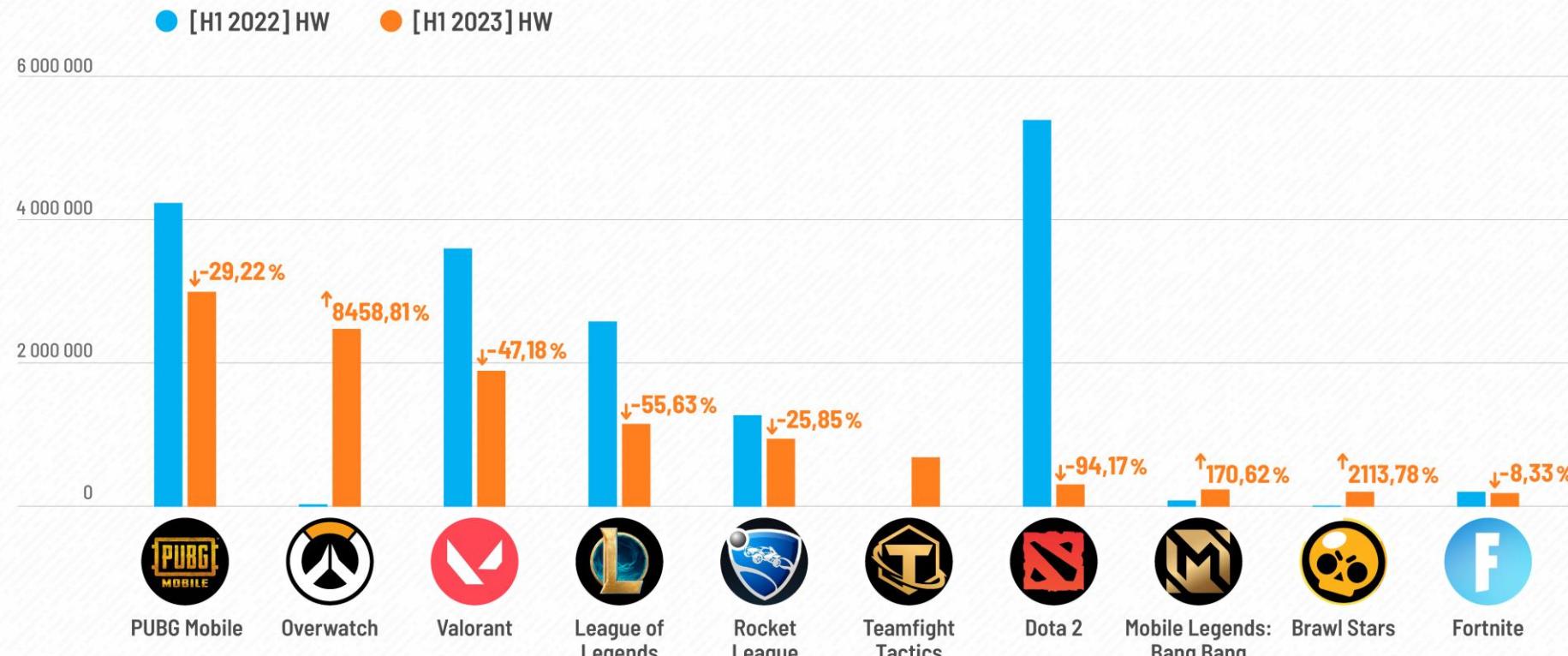
GAMERS
جَمِيعَ الْمُهَاجِرِينَ



\$45 million
prize pool
(2023)

Esports Hours Watched

TOP-10 ESPORTS CATEGORIES IN MENA



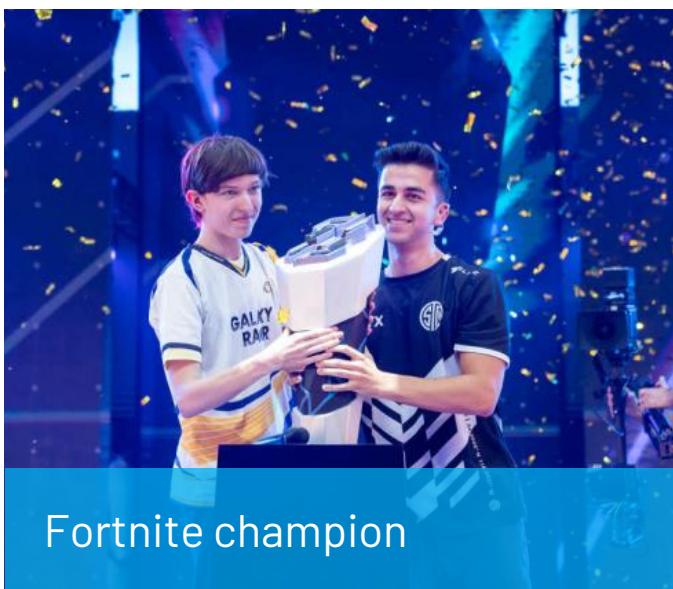
Rise of MENA Esports Stars



Team Falcons successes



EVO Champion



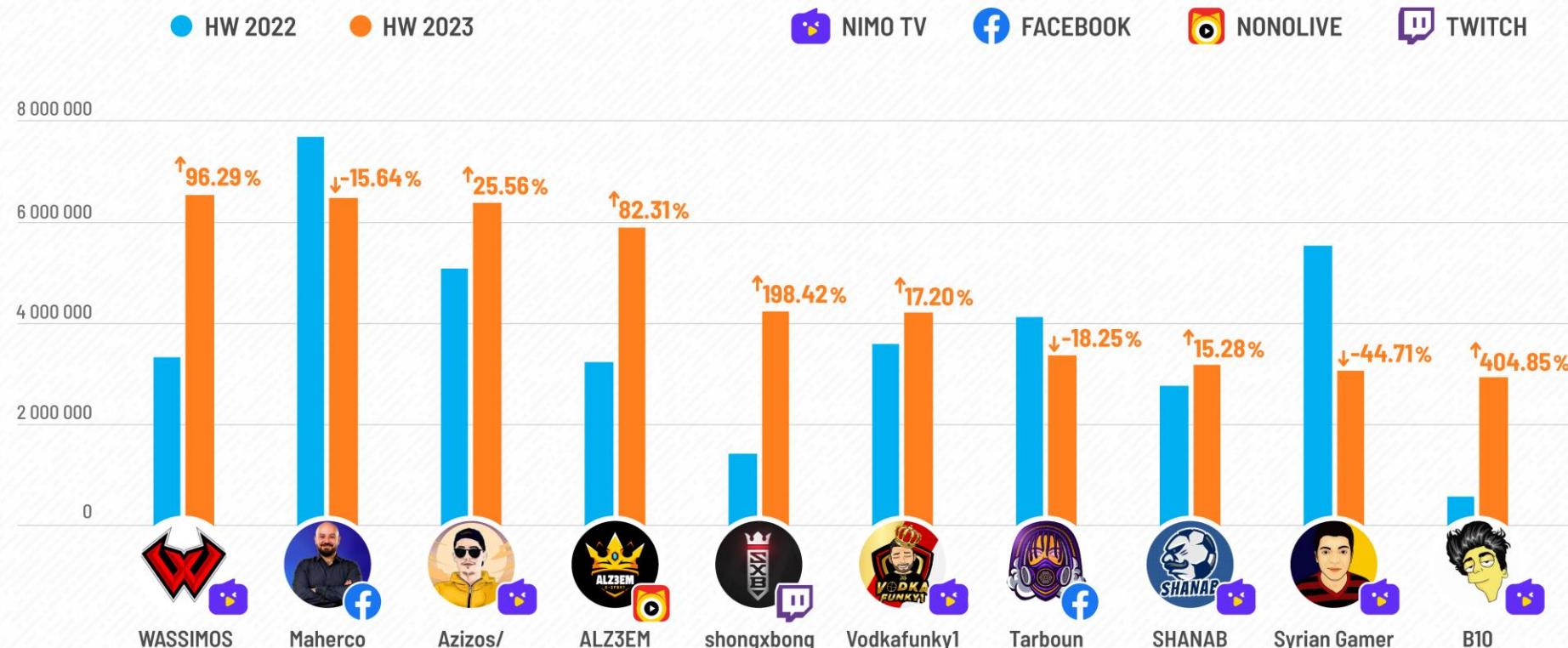
Fortnite champion



CS:GO WEC Entry

Rise of Arabic-Speaking Influencers & Streamers

TOP-10 ARABIC STREAMERS



Social Gaming in MENA



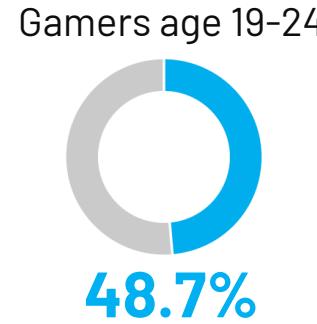
Pandemic led to rise of online social gaming



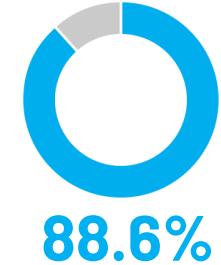
Gaming as socializing platform



Internet cafes as socializing sites



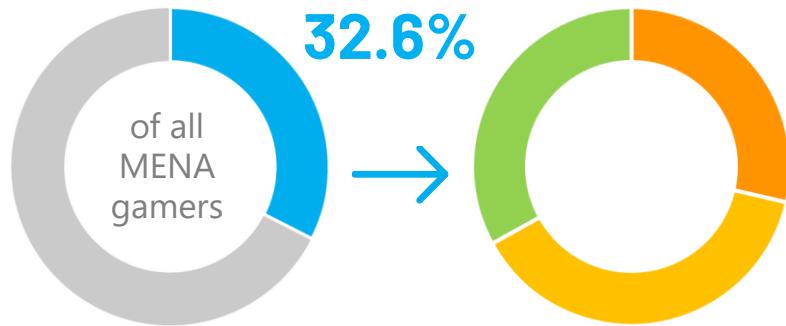
Voice chat used by gamers



Female Gamers in KSA



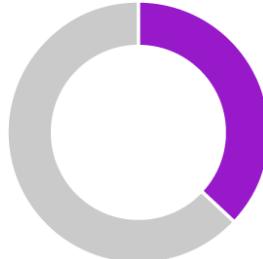
Female Gamers
in MENA



In Asia
incl. China



Use social media to get
information on gaming



Events & Partnerships
Creating growth & safe
space for women



Female game
dev event



Women-only
gaming lounge



Najd Fahd
First Saudi female
to win FIFA 20



أكاديمية
طويق
TUWAIQ
ACADEMY

Female game dev
academy



China's Market – A Benchmark



Mobile



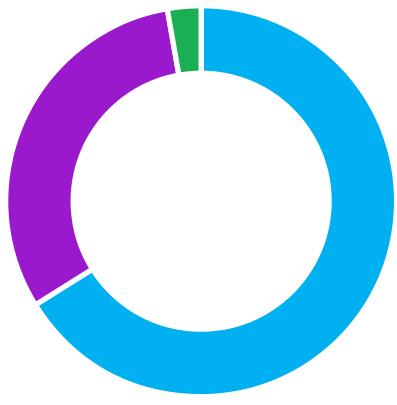
PC



Console



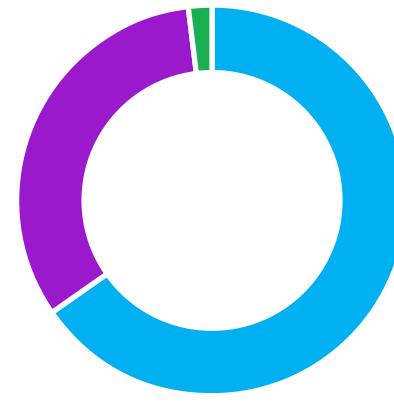
Games revenue



\$30.1
billion
\$14.2
billion
\$1.18
billion



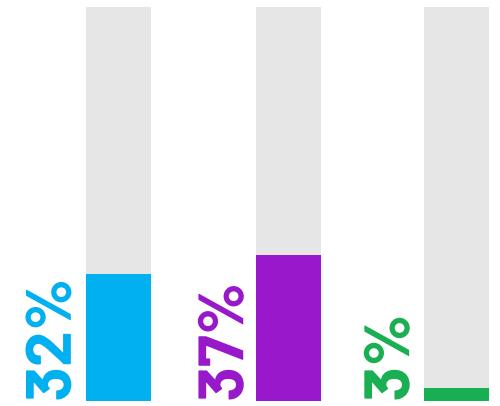
Gamers



640.6
million
322
million
16.7
million



Of revenue worldwide

Gaming time limit
on childrenOfficial licenses
by NPPA

Chinese Fans Go Wild For Esports Victories

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



Timeline of Chinese Games in MENA

2009



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

YoY growth from Egypt

20.8%

YoY growth in MENA in 2022*

57.7%

2015



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

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

2018



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

mHooYo
Tech Otakus Save The World

CAMEL GAMES

MOONTON

lilith GAMES

KSA - China relations

PIF's Investment in VSPN



© Niko Partners | Source: Savvy,



MCIT-SAFCSP partnership to grow domestic industry

Investment from Chinese companies

Tencent ByteDance

iGG
IGOT GAMES

ONEXT

点触科技
DIANCHU TECHNOLOGY

Other Asian Markets to Follow

2022 Revenue and General Summary



Mature Markets | Established Game Industry



Japan



\$18 B



Korea



\$9.8 B



Chinese Taipei



\$1.9 B

More diverse gaming platforms

Stable regulations

More older gamers



Emerging Market | Growing Game Industry



Southeast Asia



\$5.4 B



India



\$705 M

Mobile game-first

Regulatory changes

More younger gamers

Talent will build the industry

Experienced
companies,
Incubators,
Education
Programs and
more



謝謝

감사합니다

ありがとうございます

Cảm ơn anh

ขอบคุณค่ะ

Cảm ơn anh

Salamat

Terima kasih

ধন্যবাদ।

ありがとうございます

ขอบคุณค่ะ

شُكْرًا لَكُمْ

Thank You

謝謝

Terima kasih

Salamat

謝謝

ধন্যবাদ।

謝謝

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