SPEAKING THE LANGUAGE
LOCALIZATION IN THE MENA REGION

Introduction to the White Paper and GCC Market

As game companies seek to reach players in global markets, localization is a key step, and how they approach this has changed dramatically since the days of simple text translation. Today, a developer's localization strategy determines their competitive advantage in a market, shaping everything from brand reputation to user engagement and retention.

To help companies tap into the best localization strategies for success in the Middle East and North Africa (MENA), Niko Partners has teamed up with the Saudi Esports Federation.

This whitepaper provides data driven insights about approaches to localization that work in MENA countries, particularly Gulf Cooperation Council (GCC) markets, based on market data, player insights, and case studies from industry leaders.

The GCC, includes six markets: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE. These countries have a combined population of 60 million in 2023, with Saudi Arabia making up 57% of this total. The region has a rich heritage rooted in Arab culture and Islamic traditions, while smaller GCC markets also have a high number of English and foreign language speakers and large expatriate communities.

GCC markets boast high per capita spending, large youth populations, and excellent internet penetration, all of which contributes to a fast-growing culture of gaming and great opportunities for game companies who can successfully navigate the region.

Niko Partners has 22 years of experience covering the games industry and leading companies in their understanding of new markets. For this white paper we have conducted a survey of 1,225 gamers, executive and expert interviews, provided case studies, and gathered extensive research covering MENA since 2020.
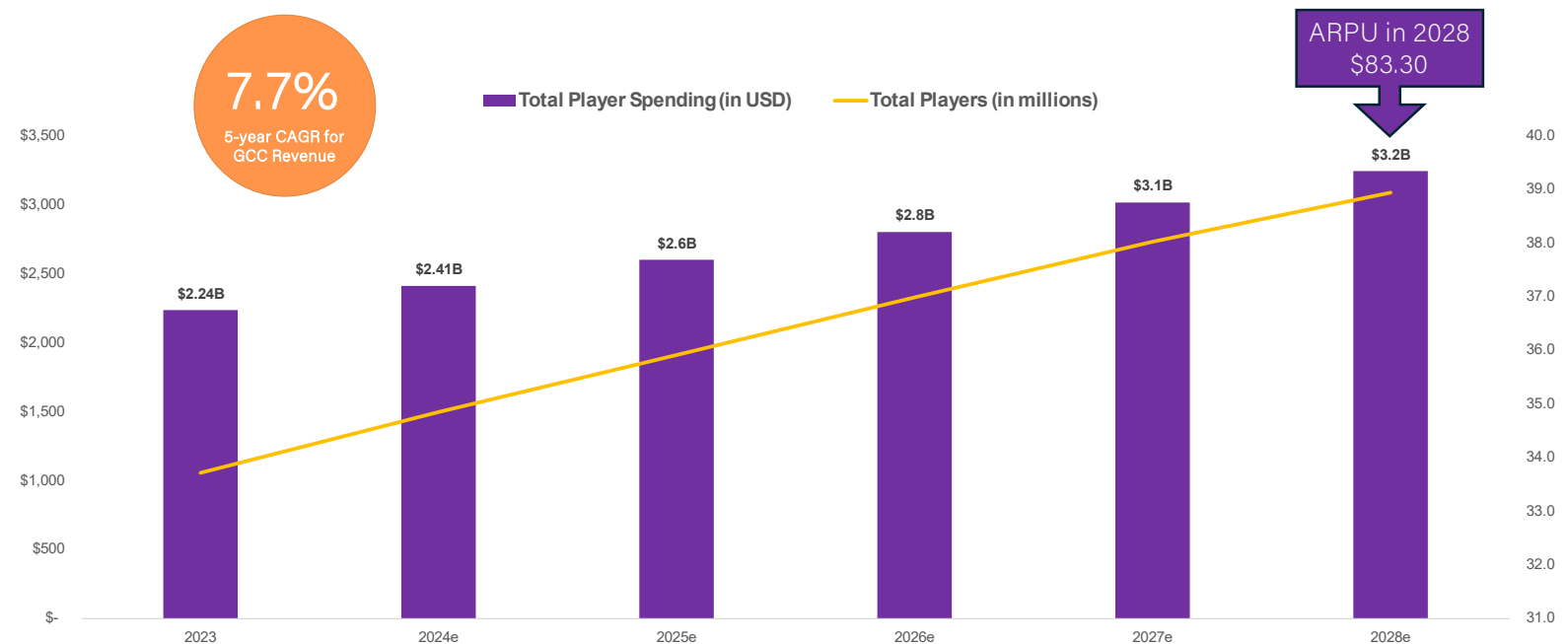
Read on to understand the importance of localization, best practices and examples of success, and how deeper forms of culturalization can lead to success in the region.

LOADING...

GCC Market Model for 2023 and Forecast to 2028

MENA, and particularly GCC countries, are among the most exciting global markets for the growth of the games industry. While market saturation and increasing regulations have led to slower progress in many global regions, MENA offers greener pastures, with a booming gaming audience and high spending, providing huge opportunities for companies who can navigate its cultural landscape.

- In 2023, the GCC accounted for 33.7 million gamers and $2.24 billion in player spending and produced an impressive annual ARPU of $66.34 across all platforms.

- Growth in this model paints an even more enticing picture. We project player spending in the GCC will grow at a 5-year CAGR of 7.7% to a total of $3.24 billion in 2028.

- The number of gamers across the GCC markets are set to reach 38.9 million in 2028 at a 5-year CAGR of 2.9%, for an annual ARPU of $83.30 by 2028.

- Saudi Arabia and the UAE will be the fastest growing GCC markets by revenue and will account for nearly 80% of player spending across all six markets.

- Among the GCC markets, Saudi Arabia is a key country to understand in the region, accounting for 49.5% of total revenue and 61.7% of total gamers alone in 2023 and is among the fastest growing in our model.

7.7% 5-year CAGR for GCC Revenue

ARPU in 2028 $83.30

■ Total Player Spending (in USD) ── Total Players (in millions)

$2.24B $2.41B $2.6B $2.8B $3.1B $3.2B

2023 2024e 2025e 2026e 2027e 2028e

GCC-6 Market Model showing growth of total revenue and gamers, 2023 - 2028

# The Evolution of Video Games Across GCC Markets

For years, the GCC markets have flown under the radar of many larger developers and publishers, mostly due to perceived language and cultural differences, to market fragmentation, and perhaps because of their small local development scene.

However, the GCC has quickly evolved, thanks in part to a concentration of high-paying players in wealthy markets like Qatar, the UAE, and Kuwait. Arabic language localization can be a tool to reach more than just the concentration of gamers in these wealthy countries.

Across the GCC there is a population of over 50 million Arabic speakers, but there are over 420 million globally, making it the 5th most spoken language in the world, with 25 countries counting it as their official language.

Modern Standard Arabic (MSA) accounts for 274 million speakers, but many more speak dialects including Egyptian, Gulf, Hassaniya, Moroccan, Yemeni, to list only a few.

Offering language localization is a first step towards reaching this global gaming population.

420M
Arabic Speakers Worldwide

331M
Population of the United States
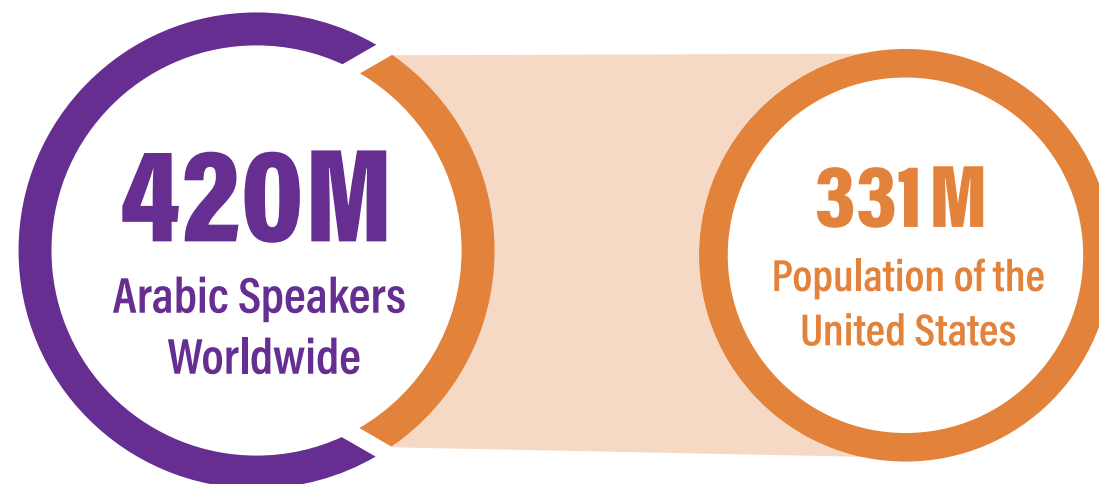
There are 420M Arabic speakers in the world, larger than the population of the US (331M)

Contrary to popular belief, the GCC region has a long history with video games dating back to the era of arcade games and early consoles.

However, because localization efforts for the markets were non-existent and hardware costs were quite high, home-gaming was much more of a niche hobby which often existed through piracy and was generally only accessible to English speakers.

As gaming and hardware have become more affordable and expanded to the mass market, the demand and support for Arabic localization increased. Console and MMO titles began implementing Arabic localization in the early 2000s. This began a trend of steady growth in player numbers across the region. Localization helps fill market gaps and meet pent up demand by giving mainstream gamers the chance to explore new titles in their language.

Official support from console platform holders, PC game publishers, and the explosion of mobile gaming has helped regional game culture grow form a niche, hobbyist scene to new heights over the past decade, with growth quickly snowballing now.

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When it comes to localization, do not simply translate. Arabic is a very particular language from a localization standpoint, not to mention it's aligned right to left. You can't just put it into a translation tool and use that. There is a lot of work that goes in to making it accurate and culturally relevant.

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Timir Rao,
Director at Geekay Group

Socioeconomic Factors Driving Growth in the GCC Today

Localization is not the only factor contributing to a fast-growing culture of gaming in MENA. A combination of favorable socioeconomic factors propel this development which include the following:

Youth Gamers

GCC markets have large youth populations who are still an untapped market for most game companies. Nearly two thirds of gamers are under the age of 35, which is the average age of a gamer in the US. These young players have grown up with gaming, are vocal about what they want, and are excited about the future of gaming in MENA.

High (Disposable) Income

Strong economic growth, backed by the region's energy wealth, has created significant consumer spending power in the GCC. For example, Qatar's GDP per capita is on par with the US, while the UAE is on par with the UK. Consumer spending in the GCC is forecast to reach $954 billion by 2025 according to Omnispay, while the IMF reports GCC countries are projected to increase their economies by 3.35%, despite post-pandemic slowdowns.

Internet Penetration

With a combined internet penetration rate above 96%, the GCC markets are among the most connected regions in the world. Public and private sector investment has built this internet infrastructure to support digital transformation across the region, and gaming is a major beneficiary. Part of this infrastructure investment relates to the cloud and data centers, like the Huawei Cloud data center in Saudi Arabia constructed in 2022, with $1 billion in support from Saudi Arabia's internet service provider, STC.

Government Investment

Saudi Arabia's Vision 2030 and the UAE's recent integration of AD Gaming into the Department of Culture and Tourism are examples of explicit government support for the development of the digital entertainment and gaming sectors. Saudi Arabia published its National Gaming and Esports Strategy (NGES) at the end of 2022, setting pathways to reach a SAR50 billion ($13.3 billion) economic contribution from the gaming sector by 2030.

Opening Up

One barrier to MENA's growth was the perception of its conservatism. Today, governments in the region have taken steps to 'open up' and embark on political and economic liberalization conducive to the growth of digital entertainment and gaming. Examples include Saudi Arabia opening up cinemas in 2018, the UAE attracting global investors and entrepreneurs with its favorable regulatory and tax environment, and Qatar's hosting of the FIFA World Cup.

Multi-Platform Gaming

One advantage of the GCC markets is the strong presence of all gaming platforms. 55% of gamers in the GCC play on console, much higher than the rate of console use among gamers in Asia, for example. Among GCC markets 62% of players are PC gamers. Finally, mobile remains dominant, as with every market in the world, with 92% of gamers playing on smartphones and tablets.

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The regulatory environment for console game releases has improved significantly over the past decade. We have clear guidelines for any release, and you can submit the game and its materials way ahead of time to get the local governing body's approval. In the past, a lot of it was guess work as there were no clear guidelines.
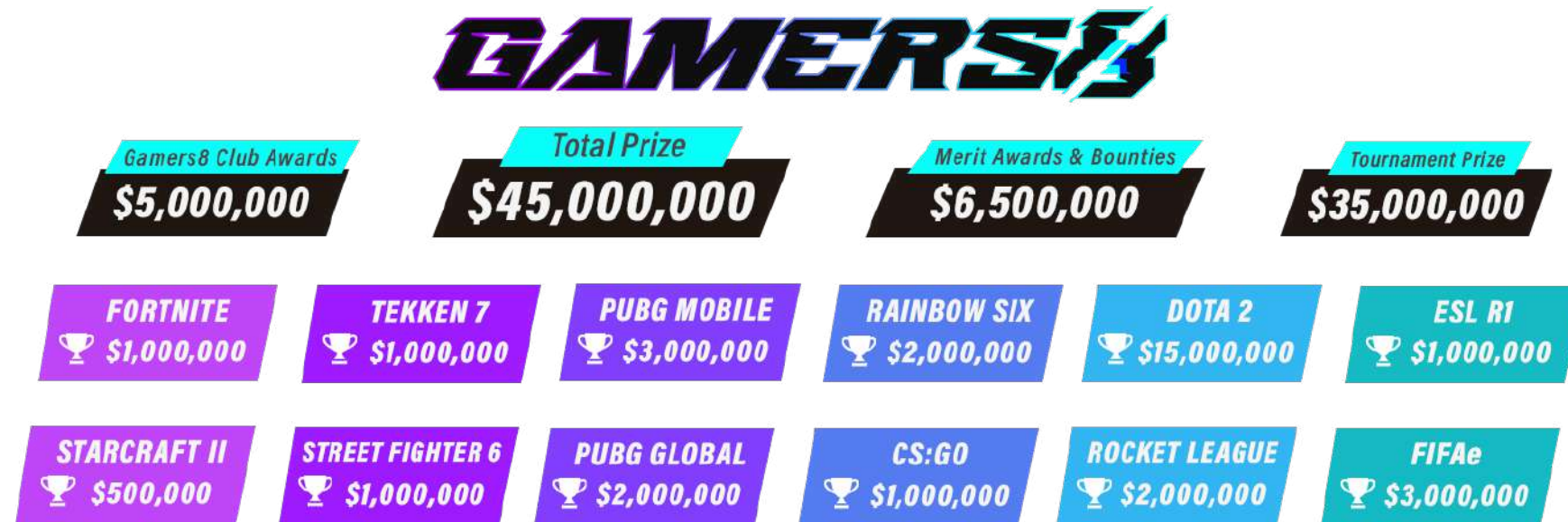
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**Mishal Alsuwyan,
Publishing Director at MBC Group**

Esports Focus

Esports has become a key focus for gaming growth in the GCC region. Saudi Arabia and the UAE have become home to some of the largest and most notable esports tournaments in the world. The UAE Esports Federation was founded in 2015, the Saudi Esports Federation was founded in 2017, and since then we've seen Kuwait, Bahrain, and Qatar follow with their own. The Saudi government organizes esports events like Gamers8 in 2023, billed as the world's largest esports event, and plans to build a $500 million esports city in Riyadh which will serve as the venue for more global stage events.

GAMERS8

Gamers8 Club Awards	Total Prize	Merit Awards & Bounties	Tournament Prize
$5,000,000	$45,000,000	$6,500,000	$35,000,000

FORTNITE	TEKKEN 7	PUBG MOBILE	RAINBOW SIX	DOTA 2	ESL R1
$1,000,000	$1,000,000	$3,000,000	$2,000,000	$15,000,000	$1,000,000

STARCRAFT II	STREET FIGHTER 6	PUBG GLOBAL	CS:GO	ROCKET LEAGUE	FIFAe
$500,000	$1,000,000	$2,000,000	$1,000,000	$2,000,000	$3,000,000

The Gamers8 tournament in Saudi Arabia had a prize pool of $45M for its 2023 event, making it the largest esports prize pool in history

Social Gaming

The proliferation of social media platforms is a driver for gaming growth, tying in with online and in-person communities and cultural norms around community gatherings and storytelling. Instagram, TikTok, Yalla and WhatsApp are popular among gamers who use them to share experiences. Gaming is social and the rising adoption of these online social platforms and in-person experiences is supporting the development of multiplayer and co-op gaming communities in the region.

> "
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> **Since 2018, a rapid growth of the gaming community has taken off in MENA, which continues today with the young, tech-savvy and digitally native population. It was in this environment that PUBG MOBILE launched across MENA in 2018 and when it began the journey of becoming one of the most popular games in the region to become the phenomenon it is today.**
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> "

Herman Zhao,
Head of Emerging Markets, Global
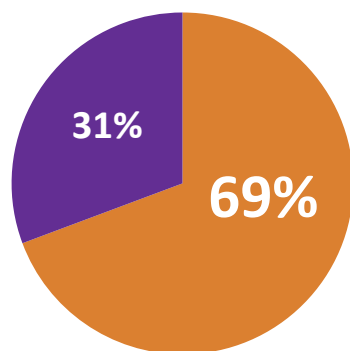**Publishing, Tencent Games**

PUBG MOBILE has a very strong MENA community presence. The video game has been seen putting out celebratory cultural posts on social media and in-game events rewarding players.
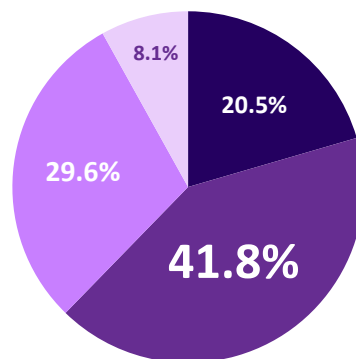
Demographic Overview of Gamers in the GCC

Niko Partners conducted a survey of 1,225 gamers in GCC markets (December 2023) and found that gaming is still male dominated with a majority of gamers playing on smartphone devices followed by PC and console.
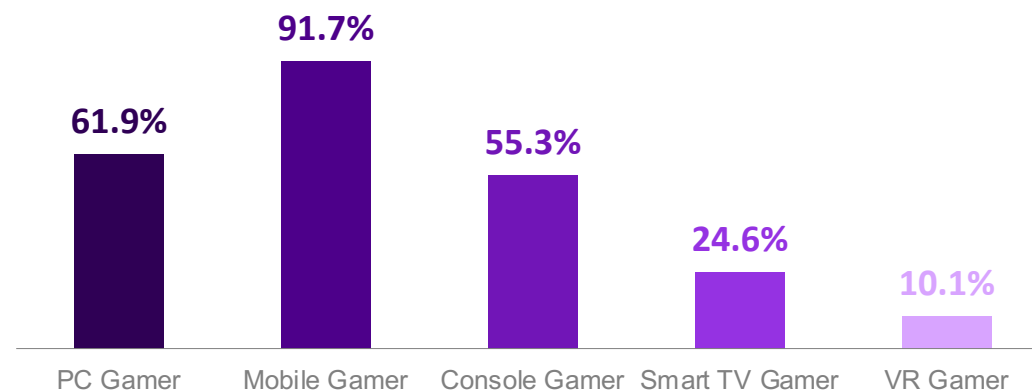
Gender Distribution

31%
69%

Male   Female

Age Distribution

8.1%
20.5%
29.6%
41.8%

15-24   25-34

35-44   45+

Preference on Gaming Hardware

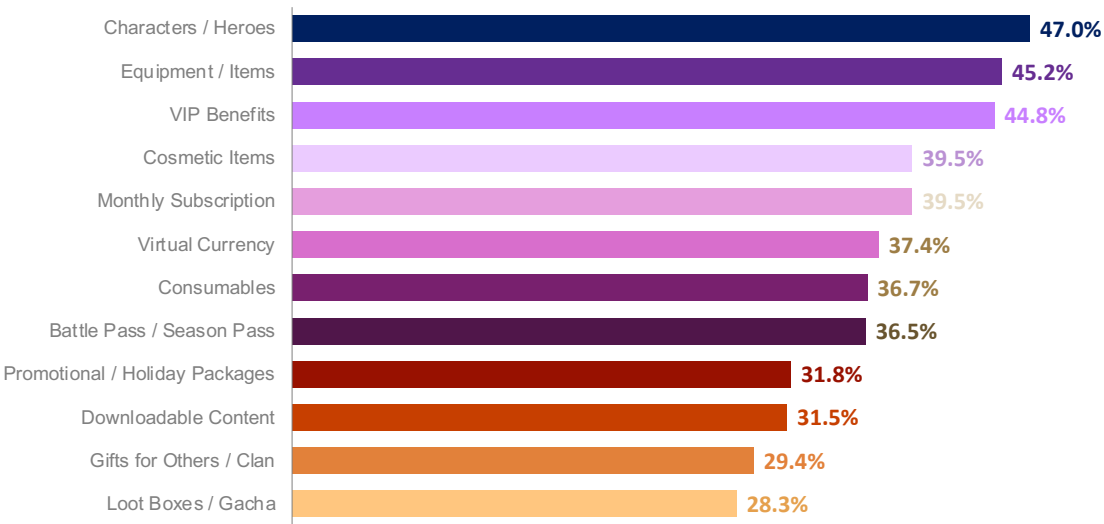| PC Gamer	Mobile Gamer	Console Gamer	Smart TV Gamer	VR Gamer
61.9%	91.7%	55.3%	24.6%	10.1%

Total annual income of gamers surveyed in the GCC indicates that there's spending power with a majority earning between $10-30,000.
While a majority of these gamers prefer to play free to play games, they tend to spend more on in game items.
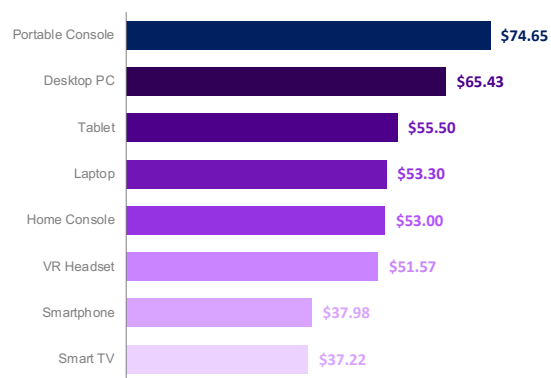
Income

- $0-10,000 USD
- $10-30,000 USD
- $30-50,000 USD
- $50-100,000 USD
- $100-200,000 USD
- $200,000+ USD

2.3%
7.1%
16.3%
29.3%
17.7%
27.3%
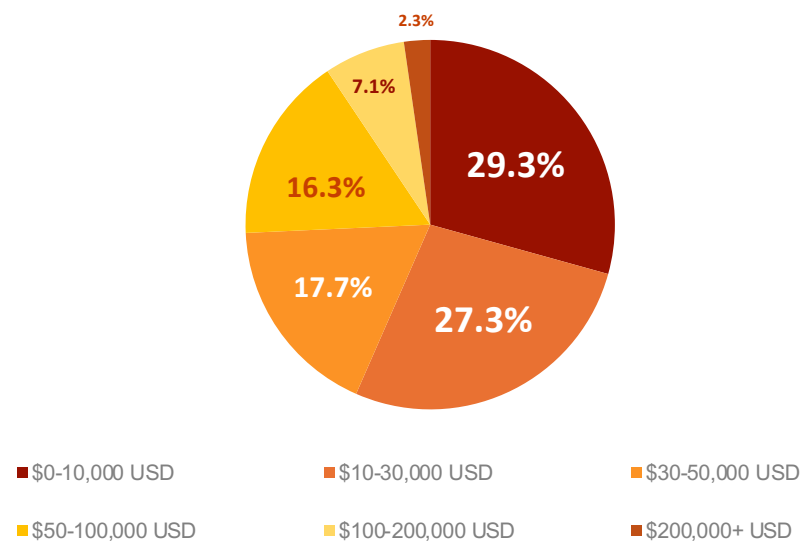
Mean Income ($40,300) and Median Income ($24,000)

Preference on In-Game or Digital Purchases

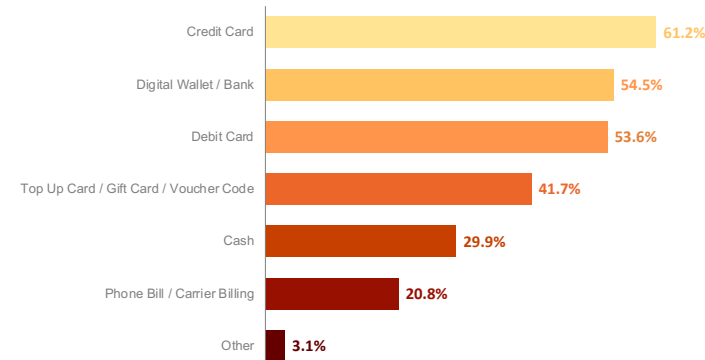|	
Characters / Heroes	47.0%
Equipment / Items	45.2%
VIP Benefits	44.8%
Cosmetic Items	39.5%
Monthly Subscription	39.5%
Virtual Currency	37.4%
Consumables	36.7%
Battle Pass / Season Pass	36.5%
Promotional / Holiday Packages	31.8%
Downloadable Content	31.5%
Gifts for Others / Clan	29.4%
Loot Boxes / Gacha	28.3%

Out-of-app monetization, particularly through web stores, is a growing trend in the GCC and helps to unlock additional revenue for publishers
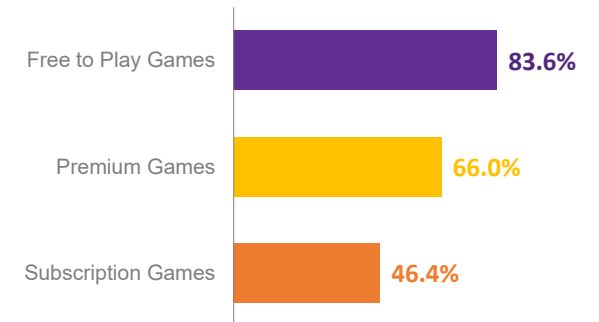
How much do gamers spend?

Device	Spend
Portable Console	$74.65
Desktop PC	$65.43
Tablet	$55.50
Laptop	$53.30
Home Console	$53.00
VR Headset	$51.57
Smartphone	$37.98
Smart TV	$37.22

Average spend per paying user per month

What payment methods do gamers use?

Payment Method	%
Credit Card	61.2%
Digital Wallet / Bank	54.5%
Debit Card	53.6%
Top Up Card / Gift Card / Voucher Code	41.7%
Cash	29.9%
Phone Bill / Carrier Billing	20.8%
Other	3.1%

40% of console and PC gamers using gift cards

Business Model Preferences

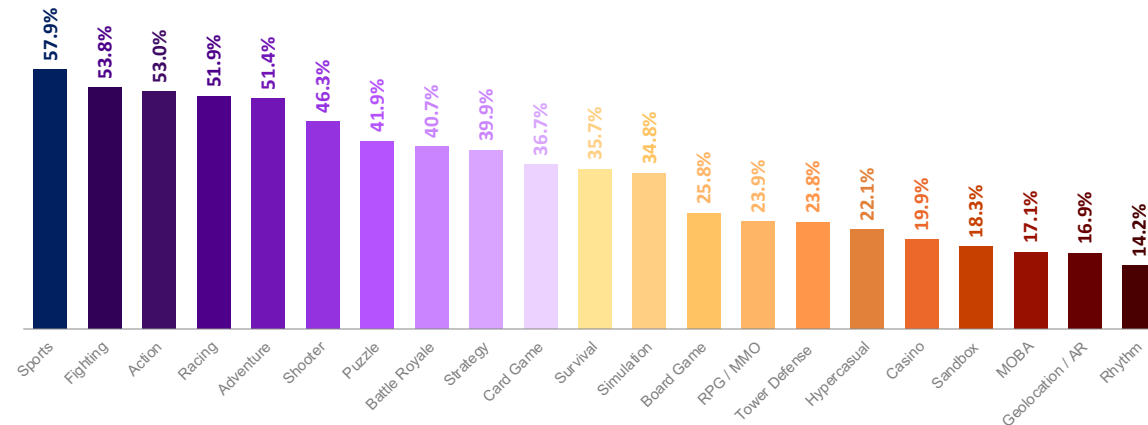| Model	%
Free to Play Games	83.6%
Premium Games	66.0%
Subscription Games	46.4%

80% of those earning over $50k a year having purchased a premium game compared to 45% for those earning $10k or less
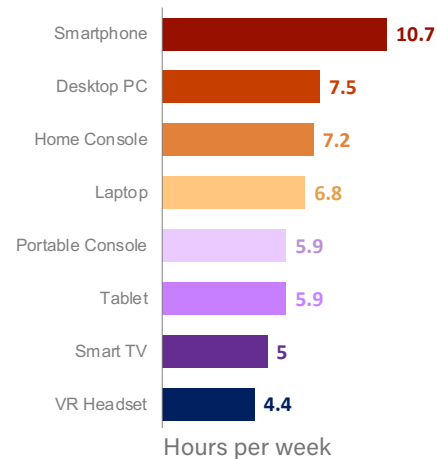
Gamers in the GCC are more likely to prefer playing sports and action games and average well over 5 hours of game time. When not actively gaming, they are also watching online content the most and spending time on social media.
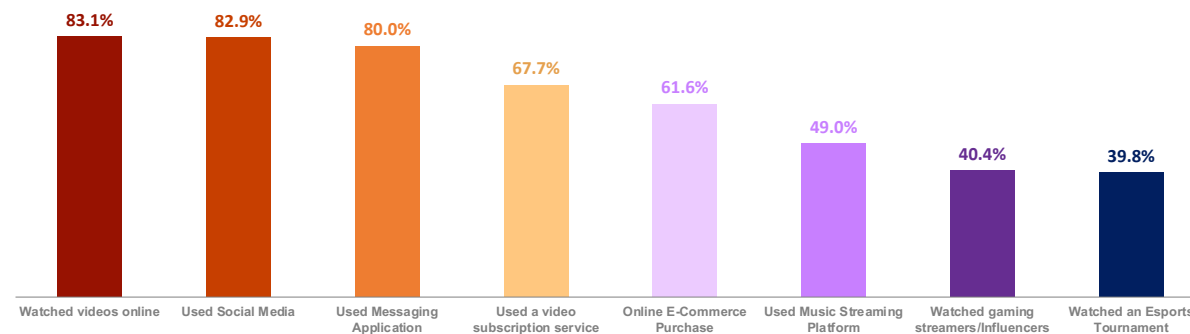
Game genre preferences

Across all three gaming platforms, sports is the leading genre

Sports 57.9% · Fighting 53.8% · Action 53.0% · Racing 51.9% · Adventure 51.4% · Shooter 46.3% · Puzzle 41.9% · Battle Royale 40.7% · Strategy 39.9% · Card Game 36.7% · Survival 35.7% · Simulation 34.8% · Board Game 25.8% · RPG / MMO 23.9% · Tower Defense 23.8% · Hypercasual 22.1% · Casino 19.9% · Sandbox 18.3% · MOBA 17.1% · Geolocation / AR 16.9% · Rhythm 14.2%

What do gamers play on the most?

Device	Hours per week
Smartphone	10.7
Desktop PC	7.5
Home Console	7.2
Laptop	6.8
Portable Console	5.9
Tablet	5.9
Smart TV	5
VR Headset	4.4

Hours per week

Male gamers play 11.1 hours a week on average compared to 9.6 for female gamers

What online activities do gamers engage in?

| Activity	Percentage
Watched videos online	83.1%
Used Social Media	82.9%
Used Messaging Application	80.0%
Used a video subscription service	67.7%
Online E-Commerce Purchase	61.6%
Used Music Streaming Platform	49.0%
Watched gaming streamers/Influencers	40.4%
Watched an Esports Tournament	39.8%

The Current Landscape of Game Localization Across GCC Markets

Game localization for Arabic markets has come a long way in the last ten years and we're starting to see developers and publishers pay greater attention to the region.

Major game publishers and platform holders such as Sony, Ubisoft, Riot Games, Unity, Tencent, My.Games and others have opened offices in the GCC or wider MENA region and are taking a more serious approach to reaching, representing, and catering to these markets. Still, the quality and extent of localization varies significantly from title to title and among developers.

- The Apple App Store, Google Play and most other mobile app stores include Arabic as a language, with an increasing number of the top games including Arabic localization.

- Sony has a strong track record of supporting Arabic on its PlayStation consoles and has also localized many of its first party titles including Marvel's Spider Man 2, God of War Ragnarök, and Horizon Forbidden West.

- Xbox has made it easier to discover Arabic language games on its platform. However, Nintendo has yet to support Arabic at the OS level on its console. We continue to see increased support from both platform holders, and Nintendo recently partnered with a local company to expand in Saudi Arabia.

- Only 3.5% of titles on Steam have an Arabic language localization, representing a significant area of oversight and missed potential.
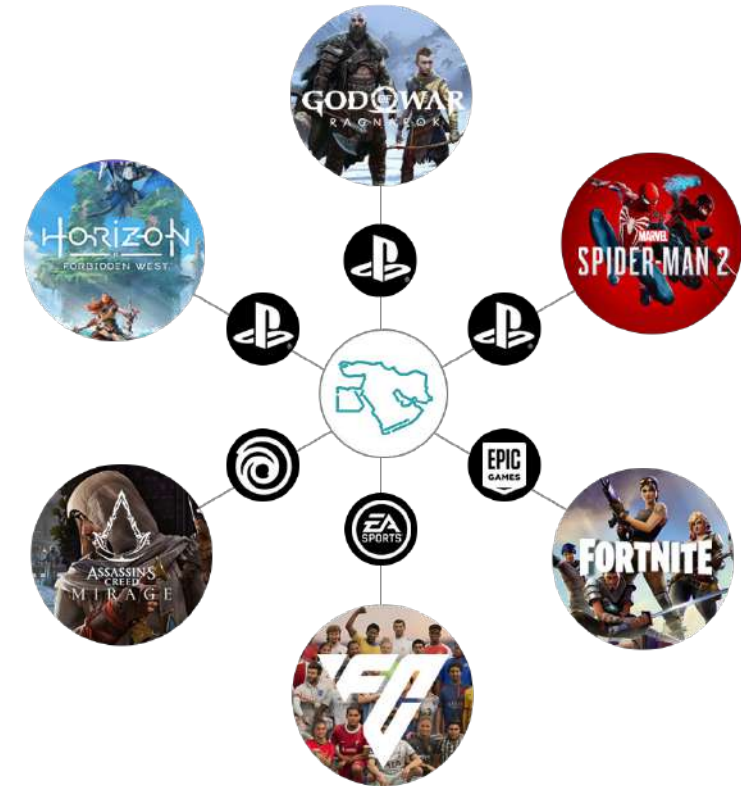

PlayStation, Ubisoft, Epic and EA are just some of the many companies that are actively operating and localizing their games for the MENA region.

There is significant demand from gamers who want to see Arabic localization.

In our survey, we found that 41% of gamers in the region say they only play games with an Arabic localization or are more likely to play games with an Arabic localization.

Gamers in Saudi Arabia, Qatar, and Bahrain have the strongest preference for localized games, more than UAE and Kuwait, which have higher numbers of non-Arabic speaking gamers.

Gamers in Saudi Arabia, Qatar, and Bahrain have the strongest preference for localized games

2.4%
9.1%
31.8%
37.3%
19.3%
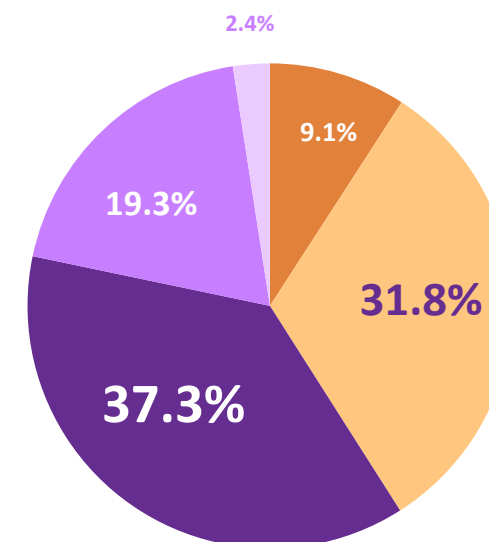
45% of Saudi gamers state they are more likely / only play games with an Arabic localization vs 34% for UAE due to the higher English-speaking population in UAE

- ■ Only play games with Arabic localization
- ■ More likely to play games with Arabic localization
- ■ Indifferent to Arabic localization
- ■ More likely to play games without Arabic localization
- ■ Only play games without Arabic localization

Overview of Games that were Poorly Localized in the Past

All localizations are not received equally. Niko Partners has encountered several examples of games that have attempted to localize into Arabic but have been marred by mistakes that have frustrated gamers. These cases help illustrate the importance of informed and considerate localization.

- In 2023, Minecraft Legends was criticized for an Arabic text translation that was described by critics as 'incomprehensible,' likely the result of quality control and poor display of the translated text.

  The publisher had to issue a statement apologizing for the error, which highlights the importance of programming for Arabic text.

- Horizon Zero Dawn also received criticism for language and terminology that sounded unnatural or was difficult to understand. The sequel, Horizon Forbidden West, took this feedback seriously and improved its localization quality, it was positively received across the region.

- One interesting case is Battlefield 3, a nearly 13-year-old game that included Arabic text on in game signage.

  In this instance, developers forgot Arabic is read right-to-left and every Arabic word looked like it was written backwards.

  It has become a famous meme locally, and it was mentioned both in our interviews as well as in feedback from survey respondents, demonstrating that getting it wrong can leave a long-lasting impression.

> **"**
>
> **I would say a comprehensive Arabic localization is not something that can be easily worked on. It requires working with the best in the business to ensure it is locally relevant and culturally appropriate. There are levels to localization, and we've seen in the past how some titles are localized better than others with a higher level of authenticity and greater positive sentiment among the gaming community.**
>
> **Timir Rao**
>
> **"**

How to Localize Text and Voice Correctly

The cases above illustrate some of the pitfalls that may affect the success of even well-intentioned localizations. Understanding fundamentals of Arabic language localization can help avoid these kinds of issues.

- First, Arabic is written and read right-to-left. This means the entire text and UI layout of a game needs to be configured to support this orientation, including dates and units of measurement. Some game engines do not natively support right-to-left, and plugins have to be used or other considerations need to be taken to achieve this.

- Arabic text characters often take up more space than English letters. Developers may need to set maximum character limits for each segment, as Arabic often expands 25% longer than English. Arabic is also a cursive script which means the letters are connected, unlike most other languages, and that means extreme care must be taken to render the text correctly.

- Arabic has a noun gender system which adds another layer of complexity when translating from English.

- Most fonts are designed to work for Cyrillic and Latin-based languages and don't necessarily translate well to Arabic.

  - In 2020, Ubisoft announced that it had created its own Arabic font to be used in announcements and games going forward.

  - This was cleaner and easier to read than the standard font they used across their games and localizations. This is something other companies are adopting as well, and shows the importance of font and UI when localizing into Arabic.

Ubisoft Middle East announcing on Twitter (X)
that it had created its own Arabic font

How to Localize Text and Voice Correctly

The linguistic diversity of the Arab world often presents challenges when it comes to text and voice localization. Arabic is seen as sacred, it's the language of Quran and other holy texts.

This is one of the reasons why gamers take language mistakes (particularly in text) seriously.

For most games aimed at a broad audience, using Modern Standard Arabic (MSA) is best. MSA is the formal version of Arabic used across the Arab world for media, education, and news.

It is universally understood and is therefore a safe and inclusive choice. The formal language is also well suited for games that are serious in nature.

However, it may not resonate with all players and its usage may not lend itself to certain contexts. MSA can be used for the main narrative or instructions, while regional dialects can be employed in dialogues, character expressions, or culturally specific references.

Story-driven and immersive games rely on voice and subtitle localization to engage players more deeply.

However, there are more than 25 Arabic dialects, which presents challenges for translation. Arabic is often seen as a monolithic language, but its diverse dialects, with different connotations, inflections, and perceptions shape how they must be employed.

While an Arabic speaker in one country may understand a word or phrase one way, an Arabic speaker in a different country may not derive the same meaning or connotation.

> **"**
>
> **One misconception when it comes to Arabic localization is that it's as simple as creating a master translation sheet that is sent to a localization agency who can work on it overnight. But that's not how it works. Certain UI elements need to be changed, the game engine needs to be able to support RTL languages, and there are so many other considerations on a language and cultural level to ensure the translation works for the game.**
>
> **"**
>
> **Nazih Fares,**
> **Head of Communications & Localization**
> **at The 4 Winds Entertainment**

Dialects to Consider Include:

Modern Standard Arabic

Best suited for text localization, may create a disconnect if used in spoken dialogue as no one in the region uses it in day-to-day conversation.

GCC Dialect

Predominantly used in Saudi Arabia, UAE, Qatar, and Kuwait, and the closest to MSA in terms of speech; favored for card and board games localization, voice packages in mobile shooter games, and online social media accounts.

Levant Dialect

Including Lebanese, Syrian, Jordanian, Palestinian, and Iraqi accents; primarily used in localizing TV shows and drama entertainment content, suitable for games with a similar cultural context.
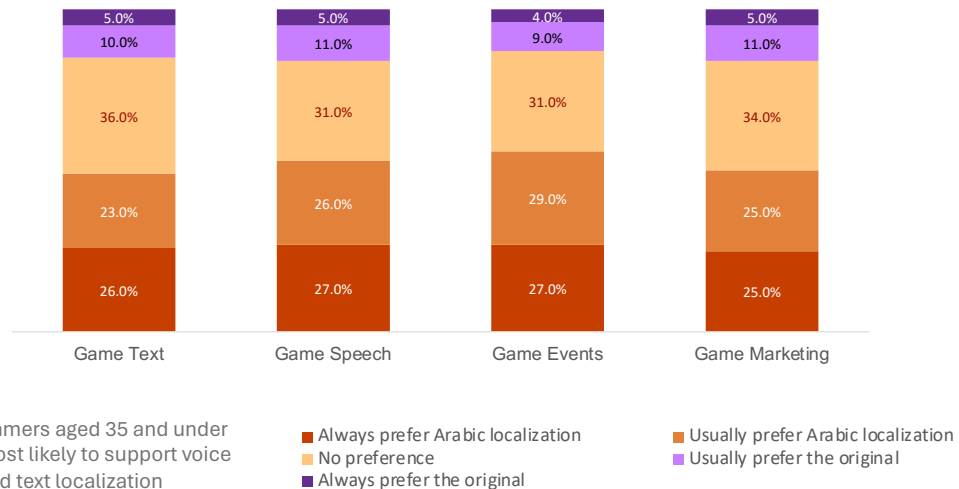
Egyptian Dialect

Widely popular in entertainment, especially for dubbing classical animation movies (e.g. Disney movies); well-suited for games with a fun and casual aspect like Marvel's Spider-Man 2.

Beyond voice localization, Voice chat in game is also an important consideration for gamers in the GCC region. Nearly 80% of gamers surveyed use voice chat when playing online games, as this method of communication aligns with the cultural norms of the region.

Findings from our survey support these conclusions and the value of localization efforts. Half of gamers strongly value text and voice localization in Arabic, with a slight advantage for voice over text (53% vs 49%). More than half (56%) of players said they would always or usually prefer in-game events to be localized. This could include events around religious holidays such as Eid or custom content for the MENA region.

Successful Text and Voice Localization

	Game Text	Game Speech	Game Events	Game Marketing
Always prefer the original	5.0%	5.0%	4.0%	5.0%
Usually prefer the original	10.0%	11.0%	9.0%	11.0%
No preference	36.0%	31.0%	31.0%	34.0%
Usually prefer Arabic localization	23.0%	26.0%	29.0%	25.0%
Always prefer Arabic localization	26.0%	27.0%	27.0%	25.0%

Gamers aged 35 and under most likely to support voice and text localization

- Always prefer Arabic localization
- Usually prefer Arabic localization
- No preference
- Usually prefer the original
- Always prefer the original

"

Arabic has very diverse dialects with different connotations to them and selecting the right dialect for the right character can be kind of tricky. It's similar to how you might use a Texas US accent over a California US accent, or a historical Boston accent, or even a British or Irish accent. It really has a large impact on the perception and the personality of the character.

"

**Rami Ismail,
Independent video game developer and consultant**

Case Study of Games that were Localized Successfully

While it is instructive to understand where other localizations have struggled, and what the most successful approaches to localization look like, it is also useful to understand cases of successful localization for MENA markets.

PUBG MOBILE

PUBG MOBILE, is one example of this kind of success story. Launched in 2018, PUBG MOBILE has quickly become the most popular mobile game in the region and the leading title by player spending. The game is published by Level Infinite, Tencent's global games brand, and is co-developed by Lightspeed and Krafton Inc.

For the localization process Level Infinite employed a dedicated community management team to gather feedback and insights in the region. They hired a diverse team, with locals from MENA, to work on the Arab language localization and to contribute a deep understanding of the GCC's linguistic and cultural landscape.

PUBG MOBILE is localized in GCC markets with region-specific language and customizations, leaving game mechanics and core gameplay consistent across all international versions. Modern Standard Arabic is used as the in-game language option.

For the in-game chat and communication features, players can use any language or dialect they prefer when communicating with other players. Important events have been incorporated into the game as well, reflecting national holidays and religious celebrations, such as Ramadan and Eid.

"

We, like many industry players, could see the opportunity in the region, given the socio-economic factors as mentioned such as the very young, tech savvy population in the region and the rise of mobile gaming with the high-quality internet infrastructure and the high market penetration of mobile phones in the GCC, especially in countries like the Kingdom of Saudi Arabia and the UAE.

We are very proud to be one of first publishers to launch such a successful localized game in MENA. We knew from our research the demand and appetite were there for localized versions of games, but we could not have anticipated how PUBG MOBILE would become 'bigger than just a game' and become a phenomenon across the GCC and in MENA.

Herman Zhao

"

Case Study of Games that were Localized Successfully

Beyond in-game localization, Level Infinite has adopted forms of culturalization, including local collaborations which are relevant to the players in the region. Some examples of this include partnerships with celebrities like Mohamad Henedi, Saif Nabeel, Noor Stars, Wegz, Masameer, the Saudi National Football team, and more.

These kinds of local and regional tie-ins have been a hit with players in MENA. Additional focus has been put on building local esports interest around the game, and as a result, PUBG MOBILE has risen to great popularity as an esport in the GCC.

Other successful localization cases include:

- Just Cause 3 , had a localized a voice over that was praised for being hilarious while nailing the comedic tone of the game. This is particularly impressive as the game's Arabic voice over uses a localized Lebanese/ Levant dialect and accent, which can be problematic when executed poorly.

- EA's series of FIFA games, now known as EA Sports FC includes commentators are from various Arab countries each using their own dialect. Many of these are the same commentators who do commentary on TV. EA has localized every FIFA game since 2012 for GCC markets, because of the success of the Arab localization.

The Arabic commentary language option available for EA Sports FC

The Portrayal of the Middle East in Video Games

Historically, video games have often portrayed the GCC and the wider MENA region, or Arab culture via stereotypes and oversimplifications.

This includes war-torn cities, politically unstable governments, or simply as an exaggerated exotic backdrop, missing authenticity. These are harmful stereotypes that, at their worst, may be racist or xenophobic, and even at best may still alienate groups of players. These stereotypes about Arab countries have persisted for so long that two terms have been coined across the industry to describe it:

- "Arabistan," the idea that any fictional or real Arab country that is portrayed in a video game, pulls from a range of Arab stereotypes to create the same tired war-torn region.

- "Agrabah," a reference to Disney's Aladdin, describes an exaggerated fantasy world with orientalist stereotypes such as genies, flying carpets, turbans, pyramids, and mummies.

- Developers and publishers often ignore the region's historical, social, and cultural complexities and create inaccurate representations of the region that can be disrespectful to gamers and lead to a distorted view of the region globally.

There is an outcry from gamers on the ground when this happens.

The Call of Duty franchise is an often-cited example of these problematic reductions of the MENA region. It was also the most cited franchise in our survey when we asked for an example of poor localization.

Most recently, COD Warzone 2.0 was criticized for its unrealistic depiction of a fictional city set in the Middle East, and adding insult to injury, it also had poorly translated in game assets. In a more positive case, Activision Blizzard has attempted to provide accurate representation in current iterations of the series. There is a growing demand for video game content that respects the cultural identity and diversity of the region, rather than reinforcing outdated stereotypes.
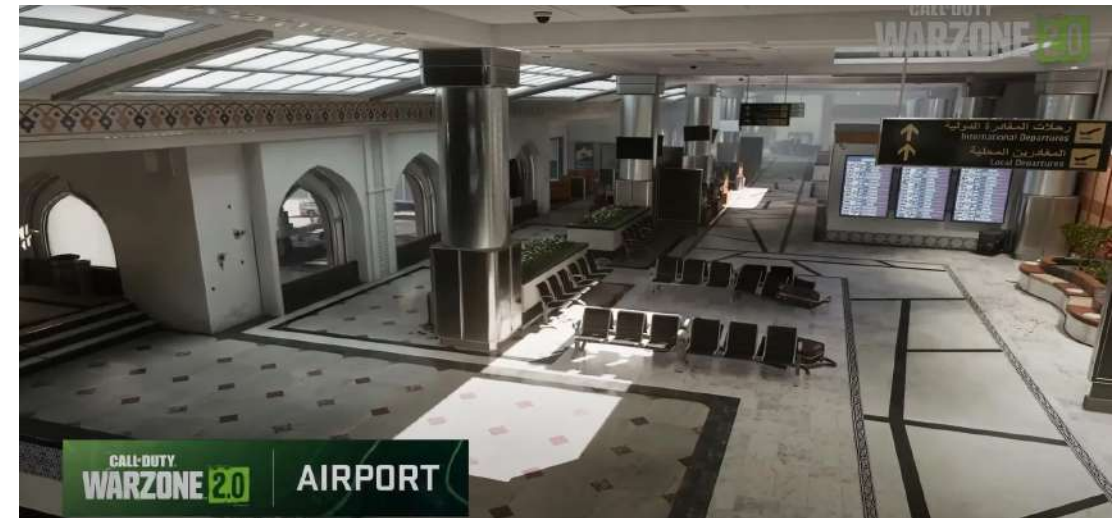
Call of Duty developer Infinity Ward has been criticised for its use of the Arabic language and cultural misrepresentation in Warzone 2. With words for the airport beig poorly translated

Overview of Gamers Perceptions of Localizations

The criticism of poorly localized titles highlights a need for better cultural sensitivity and awareness in game development.

In the modern era, game developers must engage in research and consultation with cultural experts, as well as collaboration with writers, artists, voice actors, and developers from the region to capture the true essence of Arab cultures.
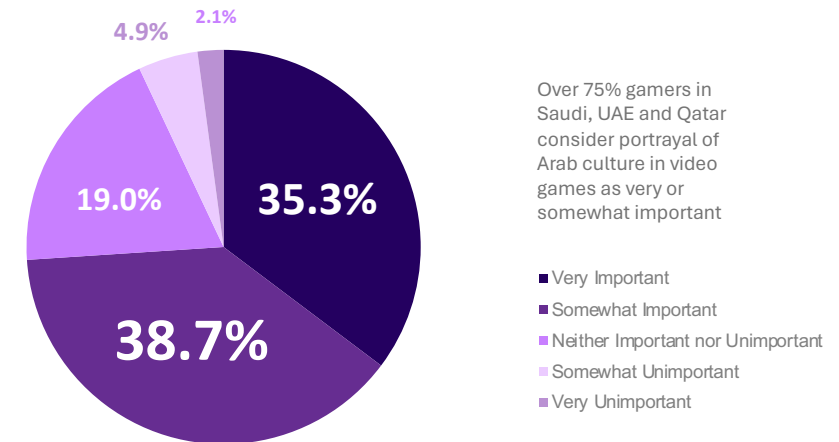
There is an untapped opportunity that developers can take advantage of by incorporating cultural and religious elements that are authentic, timely, and inclusive. These elements help draw in players and build gaming communities, in MENA and across the Arabic-speaking diaspora.

In our survey, we found that 10% of gamers who played a game with an Arabic setting or theme over the past 12 months, said those games were either often or always disrespectful of Arab culture.

This was felt particularly strongly by gamers in Saudi Arabia, Kuwait, and Bahrain. Only two-fifths (39.4%) of respondents said the games they played were always respectful of Arab culture, indicating that there is still much work to be done.

An additional three quarters of respondents (74%) said it was very or somewhat important to see Arab characters, stories, culture, and settings represented in video games.

How important is seeing Arab characters, stories, culture and settings when playing a video game?

- 4.9%
- 2.1%
- 35.3%
- 19.0%
- 38.7%

Over 75% gamers in Saudi, UAE and Qatar consider portrayal of Arab culture in video games as very or somewhat important

- Very Important
- Somewhat Important
- Neither Important nor Unimportant
- Somewhat Unimportant
- Very Unimportant

"

The Middle East is more of a reputation bound market, more so than the US, and it is a market where negative sentiment will ripple for not just current but for future titles in a franchise or by the same developers. Given that, if planned properly from the start, it is not a particularly expensive market to reach.

Rami Ismail

How to Localize for a More Authentic Representation

"

Generally, budget and time restraints are an issue when it comes to localizing in another language, such as Arabic. Arabic localization is often an afterthought, and it often feels like an afterthought to gamers playing the title. The lack of direction given to voice actors for the Arabic dub of Horizon Zero Dawn led to small, but immersion breaking mistakes, such as Alloy referring to female characters as "him" and vice versa.

"

Mishal Alsuwyan

Over the years, certain general guidelines have emerged, particularly in the realm of "culturalization" or cultural localization. These serve as best practices for companies hoping to successfully reach a GCC or MENA audience.
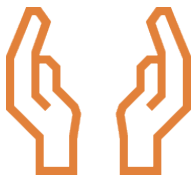
Islam/Religion

The most significant cultural factor developers must be mindful of is Islam, which serves as the dominant religion for the region. Knowledge of Islamic laws and principles can help ensure that game content does not contain anything offensive or prohibited and is key to avoiding both direct regulation and cultural offense.

Respect for Muslim traditions and Islamic values is a necessity. This includes avoiding representations of alcohol, drug abuse, gambling, nudity, and inappropriate attire, or behavior. Developers can incorporate minor changes to align with the values of gamers in the region. Some simple workarounds include replacing pork with chicken or alcohol with a soft drink, for example. Words like "Prophet" or "God" should use other terms to avoid scrutiny from gamers and regulators. These kinds of considerations go a long way in the eyes of an Arab audience.

Incorporating Celebrations and Traditions

Following from this, incorporating Islamic festivals like Eid al-Fitr and Eid al-Adha is an opportunity for developers. Games can include special events or themes around these occasions, offering a sense of connection for players both in the region and globally. There are 1.9 billion Muslims around the world that celebrate Eid, so these kinds of overtures to a Muslim audience may serve more than just the MENA region. Event culturalization might involve in-game decorations, special challenges, or culturally relevant rewards that resonate with the celebrations. For example, Overwatch added Ramadan and Eid themed sprays in the game.

Language and Nuance

Developers should strive to 'culturalize' content to reflect local customs, values, and societal norms. This involves adapting narratives, characters, and settings to align with the cultural context of the GCC region. For example, certain game genres use specific wording, phrases, or abbreviations that don't have a direct translation into Arabic, and these types of translation require more thought. The shooter genre is one example where phrases such as 'Lobby' and 'Squad' are common but don't have a direct translation or where the direct translation would sound unnatural. The PUBG MOBILE localization team resolved this by adapting native phrases that align with the English meanings. This proved so popular that Arab gamers now use those same phrases across other shooter games.

Representation

Representation must go beyond tired stereotypes of characters and the region as a whole. Instead, characters representing MENA or Arabs should be crafted with depth and complexity, avoiding one-dimensional portrayals. Engaging with historians, cultural consultants, and community representatives from the GCC region is one strategy that ensures accurate and respectful representation. These kinds of advisors can ensure that cultural symbols, attire, and practices are used respectfully and contextually while helping to avoid using cultural elements as window dressing, without accounting for their wider significance.

Marketing Campaigns

Localized marketing campaigns are an important tool companies use to reach audiences in MENA. Even when companies haven't incorporated language localization, they often still market titles in the region. This was the case with Starfield, which celebrated its launch in Saudi Arabia at the Al-Ula historical monument. While marketing can be fully Arabic in Saudi Arabia, more nuance is needed in markets such as the UAE and other countries with a high number of English speakers. Social media and user-driven marketing campaigns must be undertaken with country markets in mind.

"

Arab gamers are vocal online and want to be heard. They want to share their opinion with publishers, and they want to hear what publishers have to say. While some publishers have pages on Facebook and X, many of them are run by an external marketing agency and many publishers have zero presence at all. This is something gamers on the ground notice and deem unfair, which can have a negative impact on a publisher's reputation.

"

Nazih Fares

Assassin's Creed Mirage: An Authentic Representation

Assassin's Creed Mirage is a 2023 action-adventure game developed and published by Ubisoft, set in 9th-century Baghdad during the Islamic Golden Age. It is an example of a title that has been received positively by gamers in the GCC due to its high-quality localization, accurate representation of MENA culture and history, and community focused approach. Here's how they did it:

Ubisoft's Humanities & Inspiration taskforce incorporated cultural, religious, and linguistic consultants to construct a database of expressions, words, pronunciations, spellings, and audio recordings to ensure an accurate depiction of Baghdad was created. Eight linguistic experts worked on the game.

Expert consultants were involved in the creative process from the beginning, not an afterthought. They were integrated as partners with the narrative team, the art team, and in some instances even the gameplay team.

A dialect coach was present at recording sessions to help guide the actors. Almost all the actors who play a key role are of the same Middle Eastern nationalities as their characters.

Eyad Nassar, a popular film and TV star of Jordanian descent, voice acted the main protagonist of the game, Basim Ibn Ish'aq.

Producers explained, "The goal for us is that when you play it in Arabic, you're not going to think 'this was translated from English;' it's going to sound and feel as if it was done in Arabic from the beginning."

Ubisoft collaborated with organizations like the Arab World Institute, Nasser Al-Khalili artifacts collection, and Shangri-La Museum of Islamic Art, Culture, and Design to bring an accurate history of Bagdad and artifacts to the game.

The game included nods to the cultural and religious influence of the time. Mosques are included in the game, veiled women walk the streets, and you can hear the call to prayer, the Adhan, played near mosques.

Ubisoft took a community focused approach, updating players globally and in-region about development updates related to localization and culturalization.

This resulted in player feedback, requesting that the 'Adhan' not be played alongside music, an oversight that could have been seen as disrespectful.

A still from Assassin's Creed Mirage.

Good and Bad Localization According to Gamers

Based on data from our survey, we found that positive responses from respondents generally centered on games respect of Arab culture.

This included native sounding voices and text, informed dialect choices. Franchises such as Assassin's Creed, EA Football Club, God of War, Revenge of Sultans, and Clash of Clans were cited as examples of good localization from survey respondents.

Assassin's Creed was cited as an example of good localization for the accuracy and authenticity of the game world, characters, and dubbing.

Negative responses for other games criticized mistakes in translation, poor dialect choices, and no Arabic support both in game and beyond the game, which made it harder for players to find a local community or friends to join.

Reputation also played a large role among negative responses with gamers citing that the developer or publisher had made mistakes in the past or had not sufficiently catered to the market before.

> **Always consult someone local when it comes to localization decisions and never just assume. While a Google Search may tell you an answer, there are many nuances when it comes to local representation and Arabic localization. When you talk to different people from various parts of the region, it becomes clear that everyone has a different perception of how Arabic localization should be conducted and how the region should be represented. It's important to ensure you understand this nuance before making decisions.**
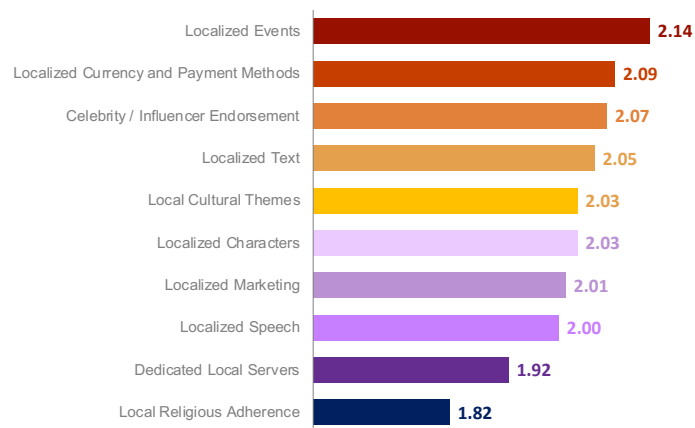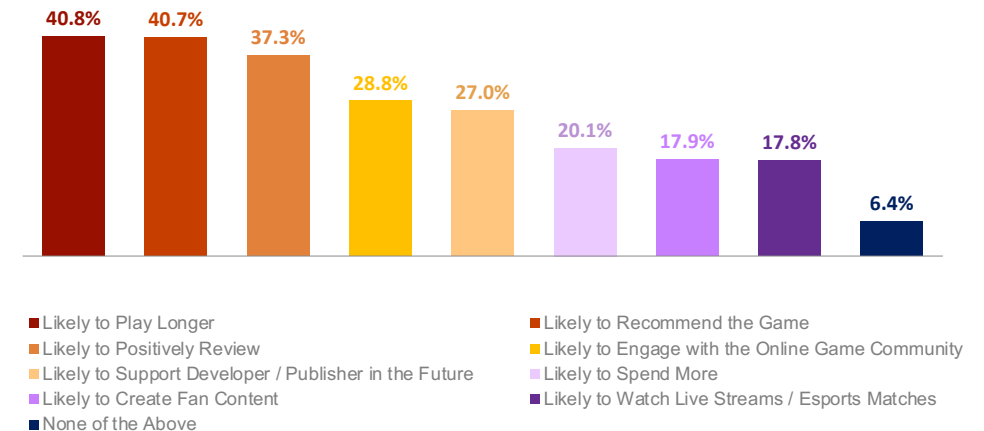
Mishal Alsuwyan

Based on our survey, we found gamers rated localized in-game events, support for local currencies and payment methods, and endorsements or collaborations with celebrities and influencers as highly as text translation when choosing a new game.

4 in 10 gamers said they are more likely to play for longer, recommend the game to others or leave a positive review when playing a game with an accurate Arabic localization.

Which of the following do you consider most important when choosing a new game to play?

Category	Value
Localized Events	2.14
Localized Currency and Payment Methods	2.09
Celebrity / Influencer Endorsement	2.07
Localized Text	2.05
Local Cultural Themes	2.03
Localized Characters	2.03
Localized Marketing	2.01
Localized Speech	2.00
Dedicated Local Servers	1.92
Local Religious Adherence	1.82

If you played a game with accurate Arabic text, voices and other localization elements, are you more likely to do any of the following?

Category	Value
Likely to Play Longer	40.8%
Likely to Recommend the Game	40.7%
Likely to Positively Review	37.3%
Likely to Engage with the Online Game Community	28.8%
Likely to Support Developer / Publisher in the Future	27.0%
Likely to Spend More	20.1%
Likely to Create Fan Content	17.9%
Likely to Watch Live Streams / Esports Matches	17.8%
None of the Above	6.4%

- ■ Likely to Play Longer
- ■ Likely to Recommend the Game
- ■ Likely to Positively Review
- ■ Likely to Engage with the Online Game Community
- ■ Likely to Support Developer / Publisher in the Future
- ■ Likely to Spend More
- ■ Likely to Create Fan Content
- ■ Likely to Watch Live Streams / Esports Matches
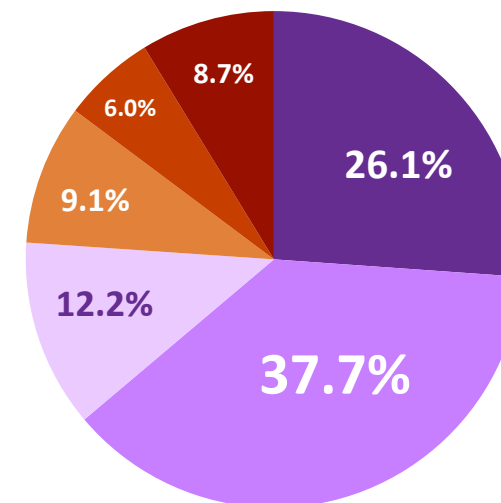- ■ None of the Above

More than a quarter (27.4%) of respondents of gamers said they would be less likely to play or stop playing a game because of a poor Arabic localization.

Another quarter (26.1%) said they would continue playing in Arabic if the gameplay was good, while less than a tenth (8.7%) would look for a fan made Arabic localization.

Obtaining player feedback is important, especially in MENA where community plays a large role and youth have a vocal online presence. Ensuring you or a localization partner can monitor and address local feedback in a respectful way is key to appeasing these vocal fans.

Companies that have failed to do this, or used inaccurate tools such as google translate, have often been criticized in the region.

As we note throughout this paper, we find that getting it right is appreciated and getting it wrong is remembered.

What would you do if you played a game where the Arabic text, voices and other localization aspects were inaccurate?

- ■ Continue in Arabic if gameplay is good
- ■ Switch to different language and play if gameplay is good
- ■ Less likely to play or spend money on the game
- ■ Stop playing the game
- ■ Ask for a refund
- ■ Look for a fan made Arabic localization

Local Game Development Studios and Finding a Partner

One strategy for localization is to work directly with a studio in the MENA region.

The GCC specifically has seen a significant increase in local game development studios through a growing interest in gaming, government support, and an entrepreneurial spirit.

Saudi Arabia is emerging as a major hub for investment in local game development talent.

A focus on game development in the country is intended to achieve the goals of their 'National Gaming and Esports Strategy' (NGES). This includes encouraging and supporting foreign studios who open offices in the Kingdom. Training and development of local talent is also a focus. A 'GameDevZone' was incorporated into the Gamers8 2023 festival to attract youth in Saudi Arabia who are interested in game development.

Manga Productions, a Saudi-based company, has invested in developing home grown talent to support the expansion of the video game industry in MENA, more than half of their talent are women.

From a regulatory standpoint, The Ministry of Commerce of Saudi Arabia continues to implement mandatory registration for companies involved in e-commerce, including gaming companies. The Ministry's report showed that game companies' registration has increased by 56% at the end of the Q3 of 2023.

The United Arab Emirates is also a key player in the global video games industry thanks to its investment in free-trade zones and its Dubai Program for Gaming 2023 which will focus on three main areas: talent, content, and tech.

The broader MENA region has also witnessed the incubation of successful developers. Tamatem Games and Babil Games, are two examples from Jordan.

SAWA Group Case Study

Working with local studios is not as daunting as it may sound, and many companies have found success taking this route. Local developers have a strong track record of adapting international games for the regional market, incorporating cultural nuances and preferences.

SAWA Group is one example of a local developer and publisher that has successfully helped global companies localize and culturalize their titles. SAWA Group is a game publisher and a localization company that is based in Dubai, United Arab Emirates, with regional offices in Cairo and Beijing as well.

The company has published games with localizations targeting the MENA audience, including Infinity Kingdom, which is heavily localized for Arab speakers, as well as SAWA Baloot, which was localized specifically for the Saudi Arabia with a Saudi dialect. One of their greatest success stories is Infinity Kingdom, an MMO strategy game for mobile devices developed by Chinese game developer Yoozoo.

The SAWA group oversaw its Arab language localization, ensuring the game was adapted and customized to suit the local culture and preferences, including adding Arabic voice-overs, characters, costumes, events, and features.

The localization team researched historical heroes in the game, consulting history books and experts to understand their current portrayal in the MENA region, and to ensure the portrayal and translations were accurate down to their weapons, costumes, and voices.

SAWA Group in a X post announcing the Infinity Kingdom Chess Battle competition at Dubai Esports and Games Festival

SAWA Group Case Study

As a publisher, SAWA Group invested heavily in marketing and promoting the game through local social media influencers, TV ads, and offline events. They also worked with local community leads to create a vibrant and loyal gaming community in the MENA region.

Prior to localizing the game, the MENA market accounted for 3% of total DAU and revenue, which increased to 80% just three months after the game was localized and a new server was launched. While all localizations may not achieve this level of success, this demonstrates the potential value that can be unlocked when developers take localization seriously.

"

We test around 20 to 30 games each week to understand which games are most suitable for the MENA market and would benefit from deep localization. There's huge potential in the MENA video games market and we have the ability to localize, test, operate, monetize and promote video games in the region.

My advice for global game companies looking to enter the MENA market is to work with a local partner to build a dedicated team for your game. This is especially important for live service games where an experienced team is needed. If you can invest in training the team at the beginning, they can help you understand the market better and how to take the next step in the region.

"

Jing Wang
CEO, SAWA Group

Final Recommendations

Arabic localization is a strategic game-changer for developers aiming to broaden their audience and revenue streams. Embracing the rich and diverse Middle East and North Africa market allows developers to take their games to new heights, captivating a wider audience and unlocking fresh opportunities.

Localization breaks down language barriers, delving into cultural intricacies to create experiences that deeply resonate with Arabic-speaking gamers. It's about crafting immersive journeys that touch players' hearts and minds, fostering a sense of belonging and authenticity.

Key Takeaways

Understand gamers on the ground: Market research is essential to understand gamers in the GCC markets, broader MENA region and Arabic speaking gamers worldwide.

Collaborate with regional experts: Collaboration with cultural consultants, historians, and language experts from the region can provide valuable insights, ensuring accuracy and authenticity in game content.

Develop games with the region in mind: Consider the cultural aspects and sensitivities of the GCC region. This includes designing characters, narratives, and settings that reflect the region's culture and values, and avoiding stereotypes. Incorporate events and elements celebrated by Arab gamers.

Partner with local developers: International game developers can benefit from partnering with local studios for localization services which bring invaluable insights into cultural nuances and consumer preferences in the region.

Go beyond the game itself: Develop a community engagement strategy that extends beyond the game. This includes participating in local gaming events, leveraging social media platforms popular in the GCC, and collaborating with local influencers and gamers to build a loyal community.

About Niko Partners

Since 2002, Niko Partners works with local panel providers to survey gamers across the Asia and MENA region on an annual basis. We also conducted interviews with 10 experts and executives familiar with the video games industry in the GCC region and included quotes from some of the individuals in this report.

For the survey in this report, Niko Partners conducted a survey of gamers in GCC markets including Saudi Arabia, United Arab Emirates, Qatar, Kuwait, Bahrain and Oman.

Niko Partners has been exclusively researching and analyzing the video games markets and consumers in Asia and MENA.

We cover China, Chinese Taipei, Egypt, India, Indonesia, Japan, Malaysia, Philippines, Saudi Arabia, Singapore, South Korea, Thailand, United Arab Emirates, and Vietnam. Our year-round, ongoing data-driven market research that informs and benefits all custom client work.

We collect and aggregate data and news in the Asian and MENA countries we cover on a daily basis, and conduct our own primary data collection. We have a global team of analysts and native speakers in the countries we cover who conduct all of our primary research: fielding surveys, running focus group, talking to gamers, visiting events and venues, and regularly meeting with game company executives and government officials.

Methodology

The December 2023 survey includes responses from 1,225 gamers. The survey was delivered to respondents in Modern Standard Arabic.

Niko Partners defines games revenue as total player spend in and on video game software and services through in-game purchases, subscriptions or premium game sales.

We define a gamer as an individual who has played a video game for a minimum of 60 minutes in the past 30 days.