Middle East Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

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Report description:

The Middle East Gaming Market size is estimated at USD 7.04 billion in 2025, and is expected to reach USD 11.87 billion by 2030, at a CAGR of 11.02% during the forecast period (2025-2030).

With the recent outbreak of COVID-19, the gaming market in the region is expected to witness significant growth due to an increased usage of online gaming services. Various gaming vendors in the market are expected to focus on increasing their user base during this period and surging returns post COVID-19 scenarios, owing to which vendors are offering benefits, offers, and waiving off their fees on the use of their services.

The gaming industry proliferates in the United Arab Emirates, with rising interest and investment in locally developing homegrown talent and games. In terms of spending, it is a very diverse region. It is expected that the average gamer in the country spends USD 115 per year.

Additionally, the growing penetration of smartphones and online gaming is a crucial factor driving the market's growth. The growing development of AR-based apps and games is expected to create market opportunities over the forecast period.

The Saudi Arabian government is also heavily investing billions of dollars in theme parks and amusement spaces. So, as Saudi entertainment industry stakeholders, trade visitors can attend dedicated conferences to gain knowledge and wealth of experience and get a hands-on technology experience at its innovative best.

Saudi Arabia set up a new charity e-sports event to raise money to fight the COVID-19 outbreak with a USD 10 million prize fund. The competition comes as the COVID-19 outbreak keeps people at home, shuts down businesses, and restricts travel to a minimum. This may unite and connect the global gaming community in response to COVID-19. With around 70% of the country's population under 30 years and approximately 20 million gamers or gaming enthusiasts, the market is expected to grow over the forecast period.

Middle East Gaming Market Trends

The Smartphones Segment is Expected to Hold the Significant Market Share

- In recent times mobile gaming has surpassed console and PC gaming as the most popular form of gaming in the Middle East region. One of several factors for the growth of mobile gaming is its availability, and almost everyone has a smartphone with games installed in it. Moreover, the increasing demand for mobile games results from various technological advancements and improvements such as AR, VR, cloud gaming, and 5G. Considering the mobile game industry mainly relies on new technology.
- AR is becoming perfect for mobile gaming owing to its immersive and interactive technology. Moreover, mobile games are the most famous AR category in app stores. Apart from previously released AR mobile games, which are still famous, such as Pokemon Go and Ingress.
- In a move to diversify the oil-dependent economy of the region and boost its software power, the United Arab Emirates (UAE) and its population of young individuals have jumped into a range of sectors, including sports and technology, in recent years.
- For instance, according to the reports by Abu Dhabi's Media and Entertainment Free Zone Authority, twofour54, and other media, expenditure on games reached around USD 326.7 million in 2019. It is anticipated to reach around USD 4.4 billion in 2022.
- Increasing smartphone subscriptions play a significant role in driving the gaming market in the Middle East. As smartphone subscriptions increase, so does the potential user base for mobile games. Smartphones are more accessible and affordable than traditional gaming consoles or PCs, making them the primary gaming platform for many people in the Middle East. This broader audience fuels the demand for mobile games and drives the market growth. According to Ericsson, in 2022, the smartphone subscription in GCC countries is 65 million, expected to increase to 73 million by the next five years.

Saudi Arabia is Expected to Hold Significant Market Share

- As the country has been moving away from its dependency on oil with its Vision 2030, the focus is significantly on digitization. Saudi Arabia's VR gaming space has been taking shape within various malls in the country, looking to house the best of the VR gaming industry. The VR concept is also increasing the business value of the malls with the help of new disruptive technology.
- Moreover, the awareness of VR is steadily growing among gamers of all age groups in the country. After the introduction of the engaging VR headsets, a dynamic shift has been taking place in the gaming industry.
- According to Social Development Bank (SDB), the video games market in Saudi Arabia is estimated to be around USD 1 billion, and the country aims to boost the market value up to USD 2.5 billion by 2030.
- Telcos in the country are also being pushed to provide the best experience for gamers, raising the transparency levels in the market and enabling investors and the public with crucial data and indicators on the sector's performance. The initiative also includes launching a quarterly award for the internet service provider with the best response time for gaming, which is a key indicator of the network's performance.
- Mobile internet traffic plays a crucial role in driving the gaming market in Saudi Arabia. Increasing mobile internet traffic provides wider access to online gaming platforms, allowing individuals in Saudi Arabia to download and play a variety of games. With a stable and fast internet connection on their mobile devices, gamers can enjoy a seamless gaming experience, explore different game genres, and connect with a global gaming community. According to Stacounter, the Share of mobile internet traffic in Saudi Arabia is 75.18%.

Middle East Gaming Industry Overview

The Middle Eastern Gaming Market is moderately fragmented and has many global and regional players. Some of the major players in the market are Sony Corporation, Microsoft Corporation, Apple Inc., Google LLC (Alphabet Inc.), and Electronic Arts Inc. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In May 2023, Apple announced the release of 20 new titles on Apple Arcade, the company's gaming subscription service that provides unlimited access to over 200 significantly enjoyable games. WHAT THE CAR?, TMNT Splintered Fate, Disney SpellStruck, and Cityscapes: Sim Builder are among the new titles available on Apple Arcade. The update includes popular App Store games like Temple Run+, Playdead's LIMBO+, PPKP+, and others.

In August 2022, Saudi Arabia approved Microsoft's acquisition of Activision Blizzard, a video game company. Saudi Arabia's regulatory body approved Microsoft's acquisition of Activision Blizzard for USD 68.7 billion.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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