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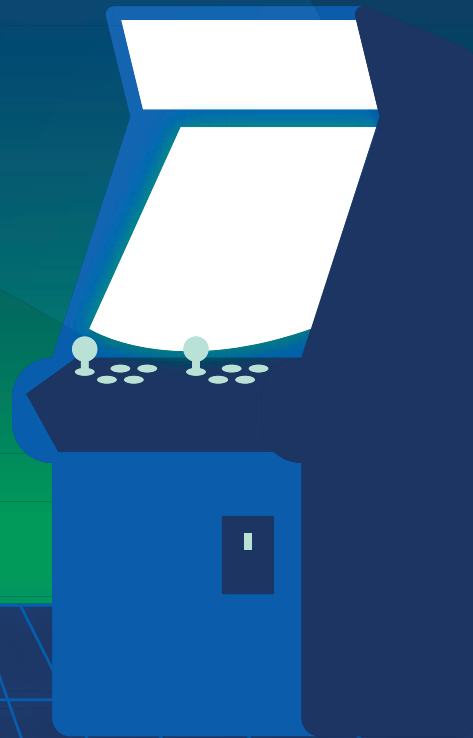
PLAYHERA

2023 Saudi Gaming Market Outlook Report



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Introduction



About the Report

Introducing the 2023 Saudi Gaming Market Outlook Report, a comprehensive overview of the market sentiment, potential, attributes, and challenges within the rapidly growing gaming industry in Saudi Arabia.

In recent years, Saudi Arabia has become a hub for the gaming industry due to its high purchasing power and large population of young people (70% being under 40 years old). The government's support for the entertainment sector, including e-gaming, aligns with the Kingdom's vision to raise entertainment spending from 2.9% to 6% of GDP by 2030.

With an ambitious National Gaming and Esports Strategy in place, Saudi Arabia aims to become a global hub for gaming and esports by 2030. This strategy encompasses launching business incubators, educational academies, and regulatory measures designed to accelerate industry growth.

To drive effective decision-making, this report offers a comprehensive overview of the current drivers of the Saudi gaming ecosystem based on a survey conducted with 130 Saudi gamers and game developers.

The majority of the 130 surveyed respondents expressed optimism about the Saudi gaming industry's future over the coming year. To

project this growth, this report weighs in on ecosystem readiness. Showcasing gamer preferences for consoles and genres, spending habits, and professional ambition, as well as game developer revenue streams and talent development.

Moreover, the report offers an outlook on the market by gauging opportunities, challenges, and investment trends within this thriving sector. The report also features five case studies that are representative of the surveyed sample segments. These case studies offer a deep dive into stakeholder approaches while presenting an overview of how the gaming market has evolved over the past decade.

Co-published by MENA-based ecosystem builder AstroLabs and Saudi-based asset management and venture capital firm IMPACT46, in partnership with esports network Playhera, this 2023 Saudi Gaming Market Outlook Report serves as a valuable resource and a first-of-its-kind outlook on the Saudi electronic gaming potential.

Roland Daher



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This report is an ambitious extension of our efforts to build the knowledge and insight needed to empower the gaming sector in the Kingdom.

CEO
AstroLabs

We're excited to present the 2023 Saudi Gaming Market Outlook Report in partnership with IMPACT46 and PLAYHERA. We aim for this report to serve as a tool for local and global decision-makers who share our excitement about this emerging market.

For over 10 years, AstroLabs has been enabling innovation and digital transformation across the region to capitalize on its unique advantages. The 2023 Saudi Gaming Market Outlook Report presents a quantifiable testament to many of Saudi Arabia's greatest feats, mainly in its young population, strong leadership, conducive infrastructure, and, most importantly, in its bold ambitions.

In 2019, we had the opportunity of working with over 40 talented game developers as part of the Saudi MCIT Game Changers Accelerator. We set out to cover all the technical and business aspects of launching unique, local, and

innovative gaming studios. While we engaged first-hand with their needs, challenges, and aspirations, we were in the process of serving multiple gaps in the market.

This report is an ambitious extension of our efforts to build the knowledge and insight needed to empower the gaming sector in the Kingdom.

Saudi Arabia currently boasts one of the fastest-growing gaming sectors in the region, gaining global attraction and playing a pivotal role in the Kingdom's bold transformation.

We're excited to be enabling effective investment in the sector through this report and even more excited to be welcoming some of its key stakeholders to the AstroLabs community. We'd like to thank IMPACT46 and PLAYHERA, whose inspiring passion and relentless dedication to the gaming community were foundational in the making of this comprehensive outlook.

Abdulaziz Alomran



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At IMPACT46, we take pride in being early supporters of innovative technologies and emerging industries like the gaming industry.

Founder & CEO
IMPACT46

We are excited to announce our collaboration with AstroLabs and PLAYHERA to issue the 2023 Saudi Gaming Market Outlook Report. This comprehensive report provides an in-depth overview of the gaming industry in Saudi Arabia and highlights the opportunities that lie within this rapidly evolving sector. At IMPACT46, we take pride in being early supporters of innovative technologies and emerging industries like the gaming industry.

In September 2022, H.R.H. Prince Mohammed bin Salman bin Abdulaziz has launched the National Gaming and Esports Strategy. This strategy aims to make the gaming sector a key pillar of Vision 2030 that intends to diversify the economy. By 2030, the gaming industry is expected to create 39,000 jobs and contribute \$13.3 billion to the kingdom's GDP.

Currently, there are more than 20 local gaming studios operating in Saudi Arabia, providing a foundation for our thriving gaming ecosystem. As the sector gains more attention and investment, we expect to see a significant increase in game developers, players, and locally produced games in the near future.

Lastly, we would like to take this opportunity to thank AstroLabs and PLAYHERA, who collaborated with us eagerly to support the local gaming ecosystem. We are excited to keep working with them as we begin a new chapter of growing the gaming industry in Saudi Arabia.

Table of contents

<u>01</u>	Executive Summary	7
<u>02</u>	Survey Methodology	11
<u>03</u>	Ecosystem Landscape	13
	03.1 Gamer Consoles & Genres	14
	03.2 Gamer Spending & Habits	17
	03.3 Revenue Generation	19
	03.4 Skillset & Skill-building	20
	03.5 Culture & Career Sentiment	23
<u>04</u>	Market Outlook	24
	04.1 Opportunities & Challenges	25
	04.2 Investment Landscape	27
<u>05</u>	Case Studies	32
	UMX Studio: The Pioneers Who Climbed All Sand Dunes	33
	Starvania Studio: Accelerators as a Launchpad for Success	35
	Nine66: A Global Approach to Local Gaming	37
	PLAYHERA: Global Esports in the Kingdom	39
	Ahmad Mujjahed: Saudi's National Champion Beats All Odds	41
<u>06</u>	Appendix	43
	About AstroLabs	44
	About IMPACT46	45

01

Executive Summary

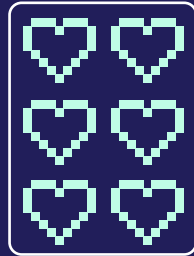


Executive Summary

In this report we have surveyed a vast sample of gamers and game developers representing the gaming community in Saudi Arabia

60%

are **confident** about government support of the gaming sector



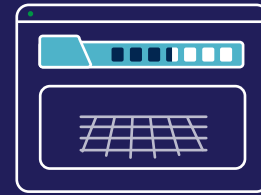
81%

are **optimistic** about the Saudi gaming industry over the upcoming year



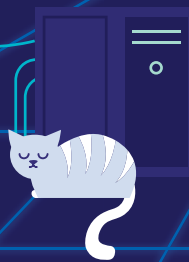
75%

had a firm knowledge of at least one **government initiative** supporting the gaming industry



35%

believe that **government support** is the biggest opportunity for the local gaming sector over the next 5 years

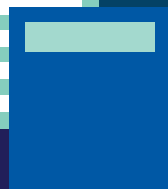


51%

preferred **institutional funding** over alternative financing for local game development

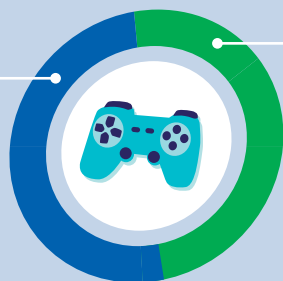
51%

believe that there's a significant demand for locally developed **mobile games**



52%

of Saudi game developers are self-taught



48%

have pursued traditional or alternative education including hackathons, online courses, and workshops



The game developer community in Saudi is conducive for growth, as the lion's share,

39%,

of industry professionals surveyed in this research had 2 to 5 years of experience



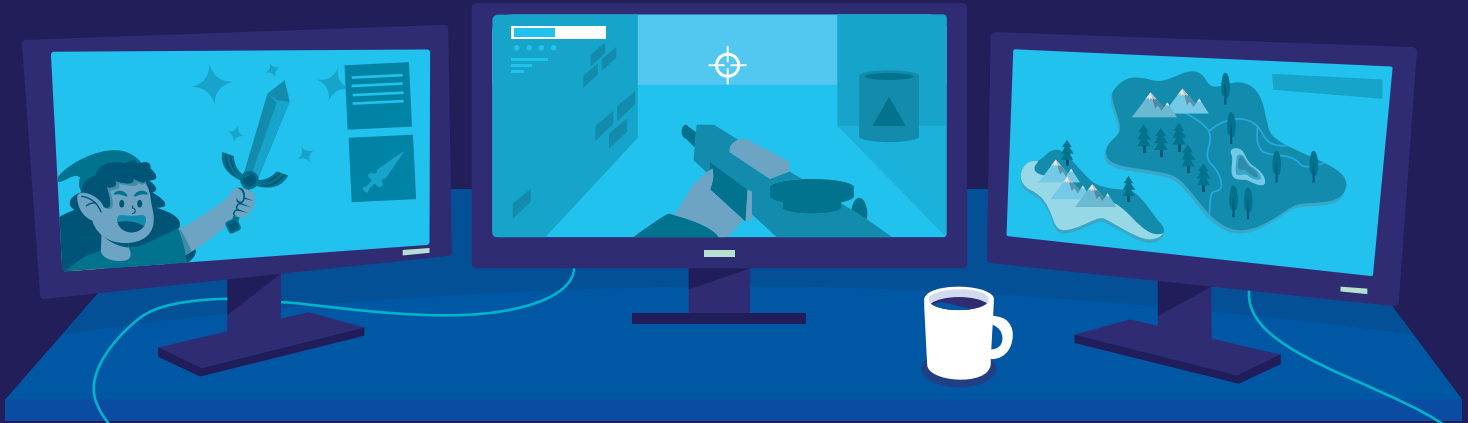
Role Playing Games (RPG)



First Person Shooter Games



Strategy Games

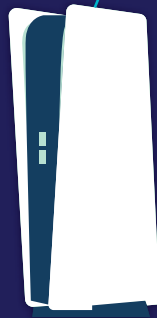


are the **most popular** amongst the gaming community in Saudi Arabia

68%

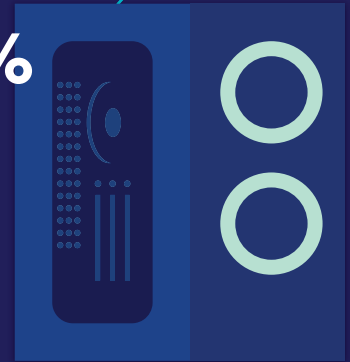
of all surveyed Casual Gamers in Saudi Arabia are **split** between →

PS
36%



&

PC
32%



53%

of Saudi Casual Gamers spend more than **5 hours** of gaming per week

33%

of Saudi Professional Gamers spend more than **10 hours** of gaming per week



02

Survey Methodology

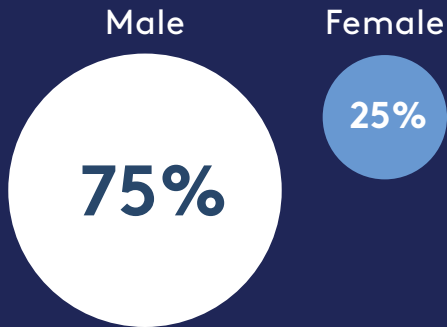


We surveyed 130 Respondents*

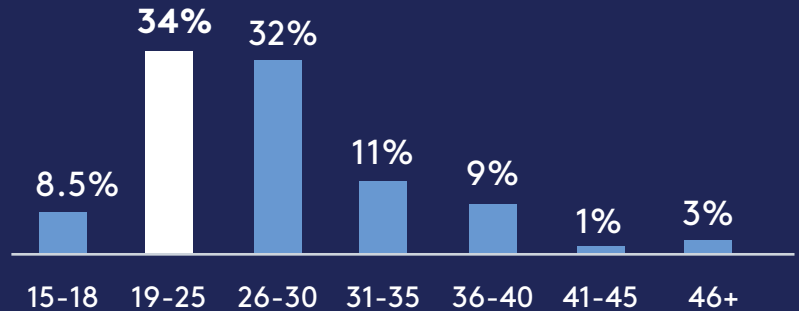
* Split into three categories:

- Casual Gamers 55 (42%)
- Professional Gamers 14 (11%)
- Game Developers 61 (47%)

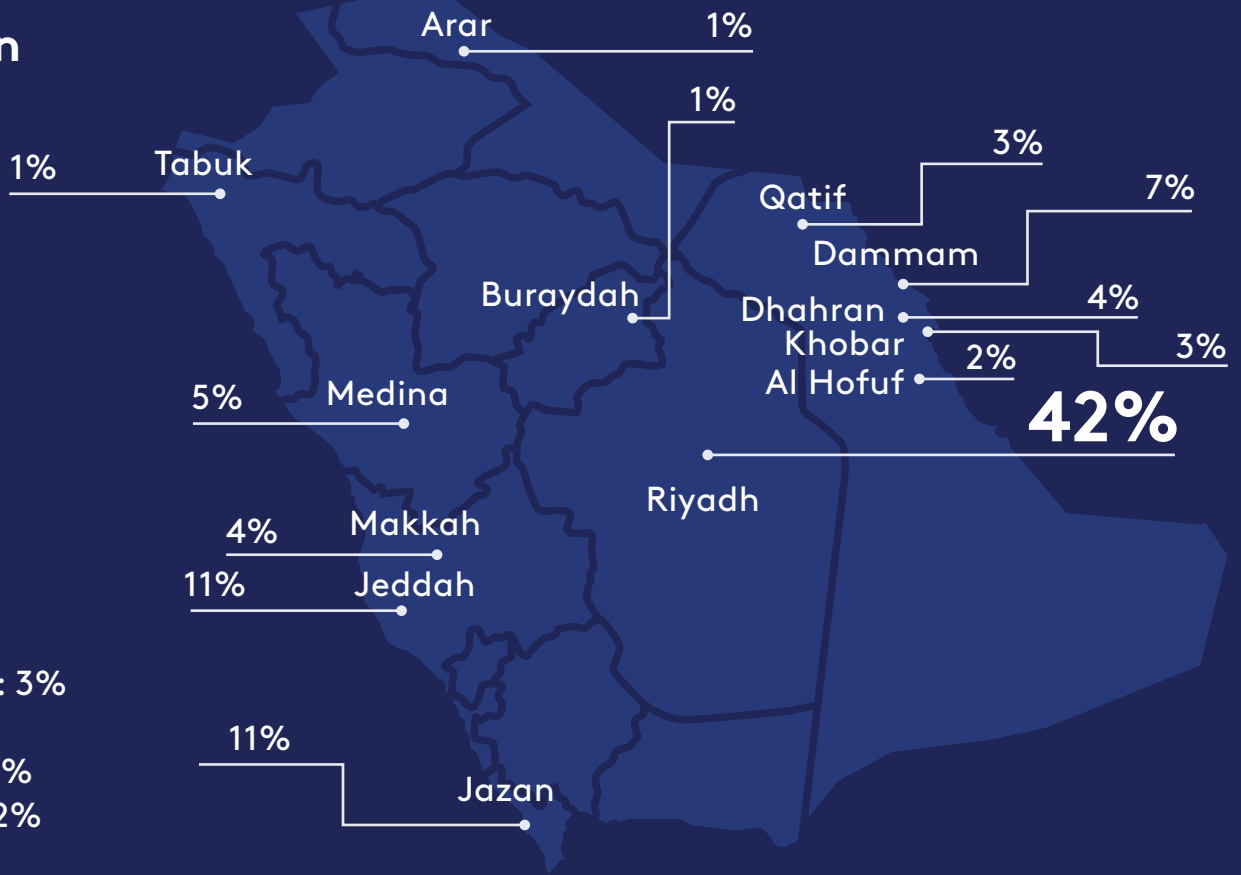
Gender



Age



Region



- GCC: 6%
- Other (in KSA): 3%
- Middle East & North Africa: 5%
- International: 2%

**This is a qualitative sample of the gaming community for guided estimation.*

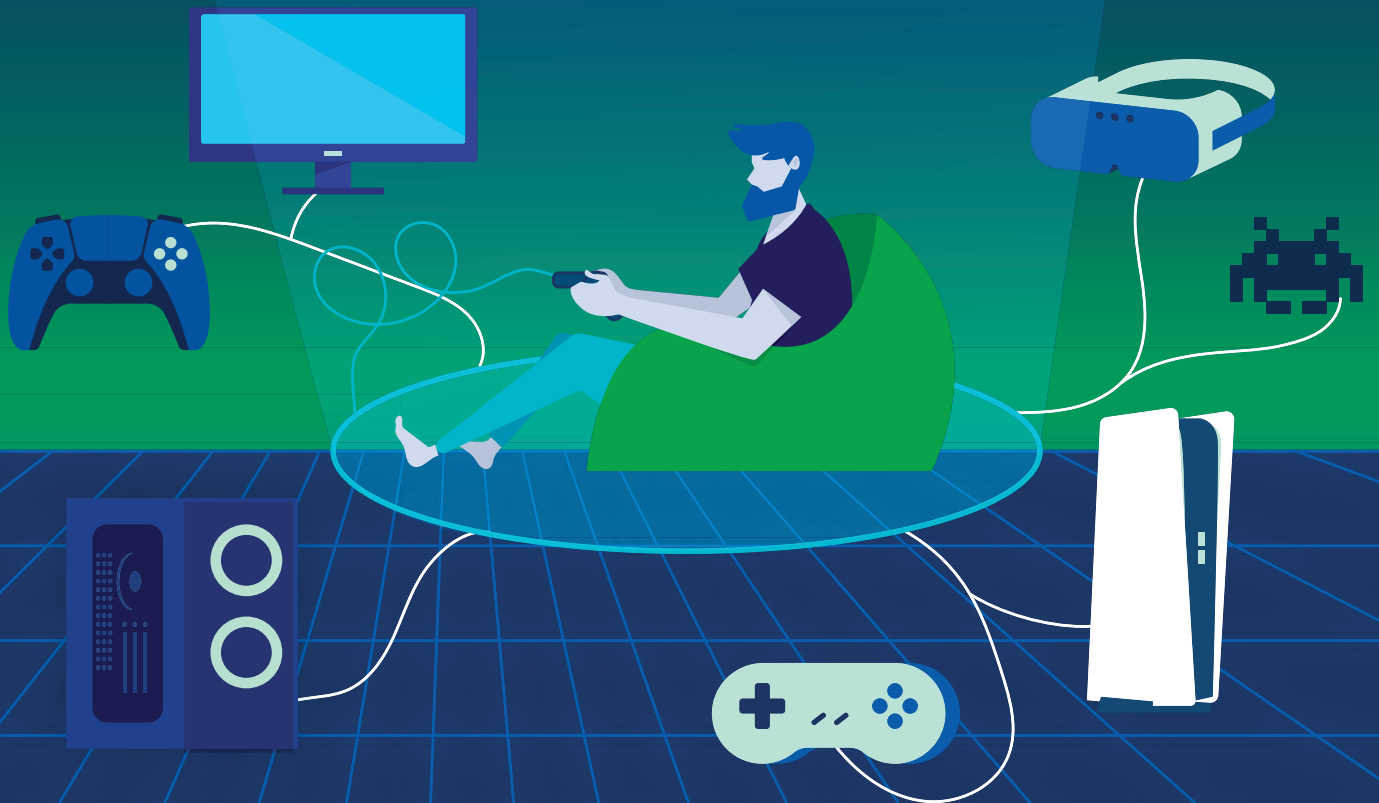
Casual Gamers: Electronic gaming players and enthusiasts who engage in games for entertainment

Professional Gamers: Electronic gaming players who compete or wish to compete on a professional level

Game Developers: Industry professionals who are engaged in any side of game production

03

Ecosystem Landscape



03.1 Gamer Consoles & Genres

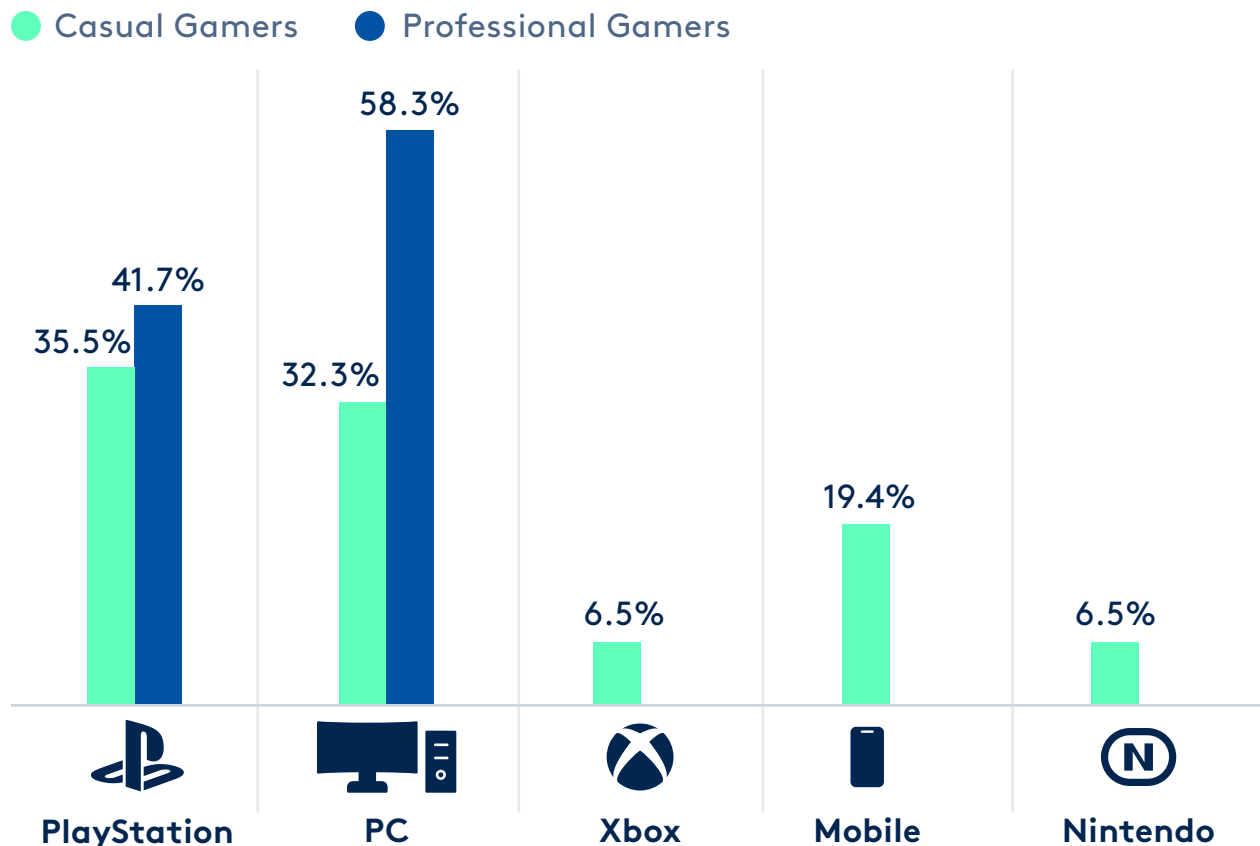
MOST POPULAR CONSOLES

The majority of gamers in Saudi Arabia are divided between PC and PlayStation as their preferred platforms, while mobile gaming, Nintendo, and Xbox continue to gain popularity.

PC ranked as the most popular console amongst 58.3% (7) of professional gamers who responded to this survey, followed by PlayStation at 41.7% (5).

Similarly, 67.8% of all surveyed casual gamers in Saudi Arabia are split between PlayStation (35.5%) and PC (32.3%) as their console of choice, followed by mobile (19.4%) and Nintendo Switch (6.5%).

PlayStation and PC voted as the most popular gaming platforms among Casual and Professional Gamers.



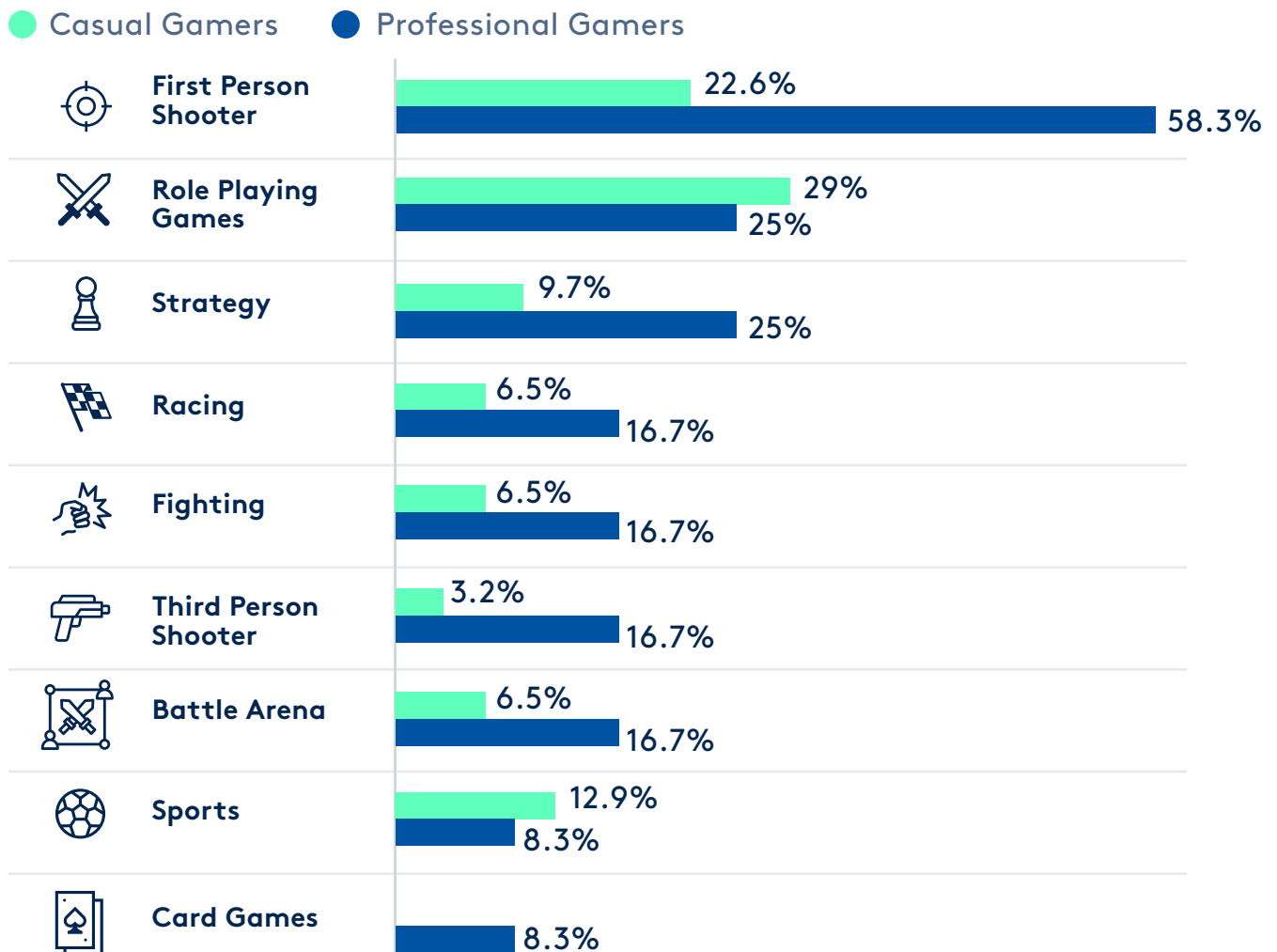
MOST POPULAR GENRES

Role Playing Games (RPG), First Person Shooter games (FPS), and Strategy games are the most popular genres among the gaming community in Saudi Arabia.

First-person shooter games (FPS) are the most popular among 60% of surveyed professional gamers, followed by Role Playing Games (RPG) at 50%, and Strategy games at 25%.

Among casual gamers, Role Playing Games (RPGs) was the most popular genre, with 29% of respondents selecting it as their preferred genre. First Person Shooter games (FPS) came in second at 23%, followed by Sports games at 13%, and Strategy games at 10%.

First Person Shooter and Role Playing Games voted most popular amongst Casual and Professional Gamers.

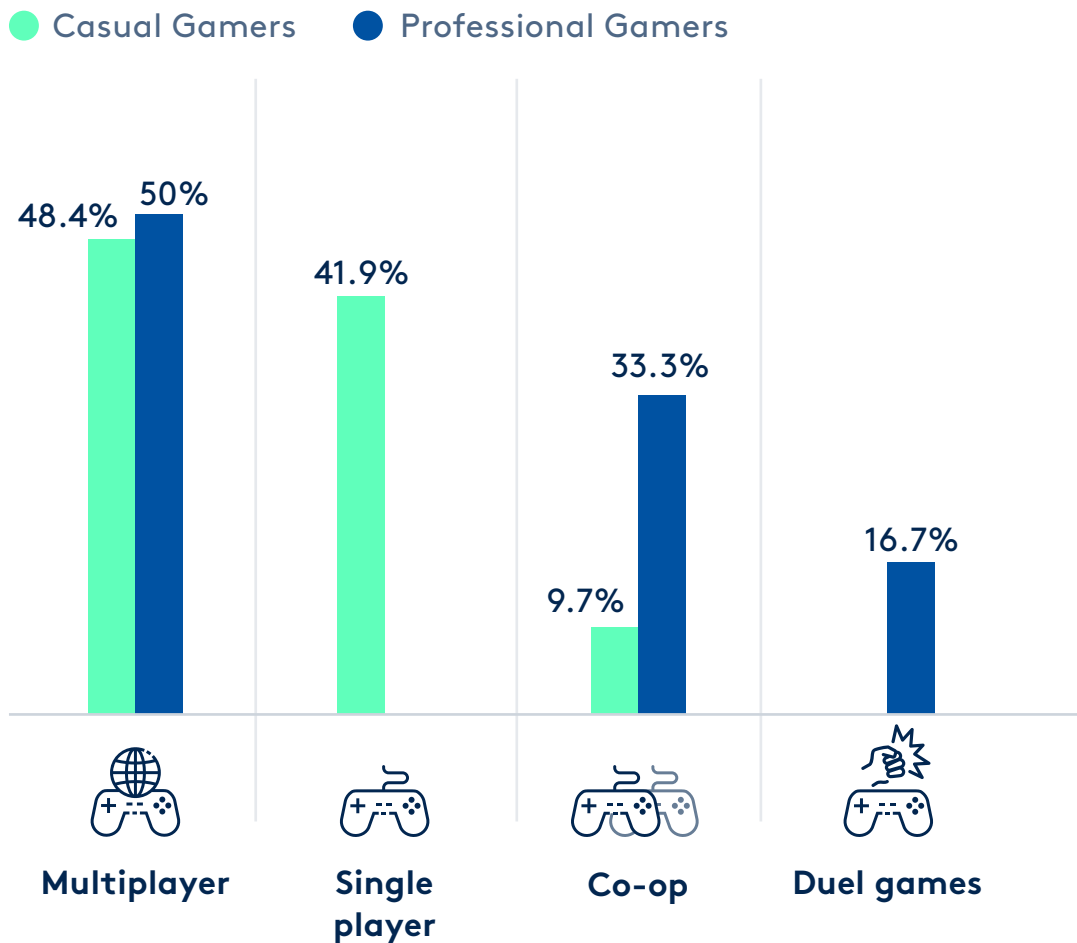


MOST POPULAR GAME TYPES

According to the survey, 50% of professional gamers prefer competing in multiplayer games, while 33% choose Co-op games and 17% favor Duel games.

A similar trend is seen among casual gamers, with 48% preferring multiplayer games, 42% selecting Single Player games, and 10% opting for Co-op games.

Multiplayer Games voted most popular amongst Casual and Professional players.



03.2 Gamer Spending & Habits

AVERAGE SPENDING PER YEAR

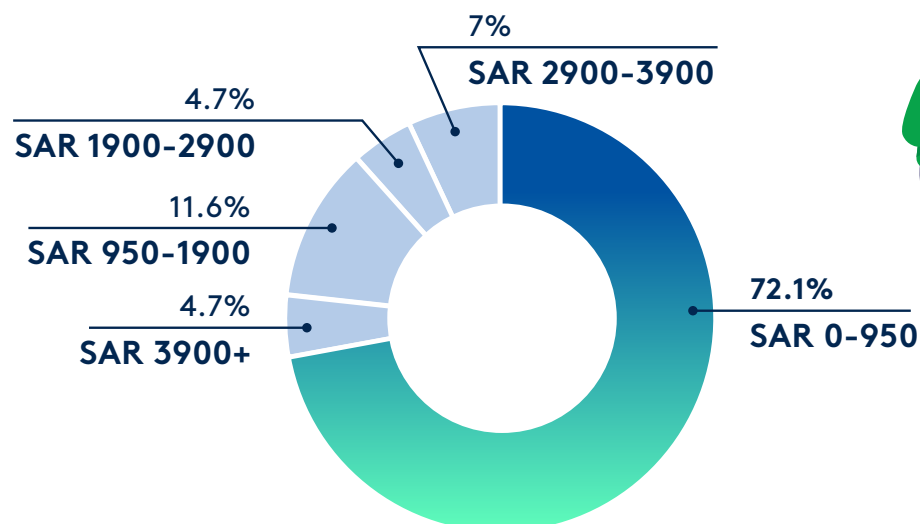
The majority of surveyed professional gamers spend a yearly average of up to SAR 1,900 (\$500) on gaming, with 25% of professional gamers spending in the bracket of SAR 1,900- 3,900 (\$1,000) on average each year. Moreover, 33% of professional gamers spend an average of 10-20 hours of gaming per week.

Similarly, 80% of surveyed casual gamers spend up to SAR 950 (\$250) on gaming every year, along with 10% of surveyed respondents spending in the SAR 950- 2,900 (\$770) bracket and 6% of

respondents spending over SAR 3,900 (\$1,000) on average on gaming every year.

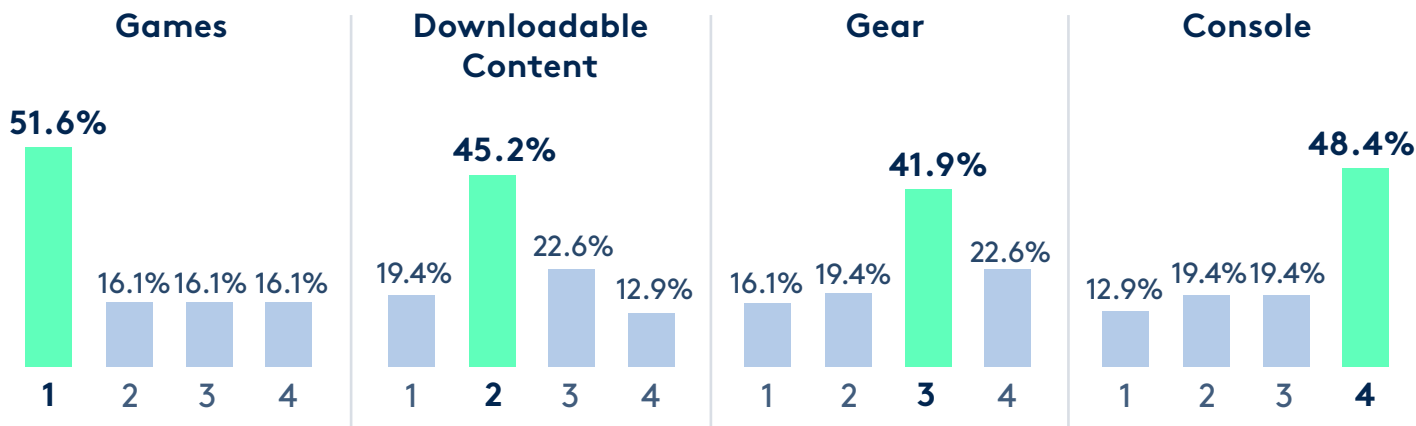
Overall, over half of the surveyed gamers play between 5 and 20 hours a week.

Majority of Casual and Professional Gamers spend up to SAR 3,900 per year on gaming annually.



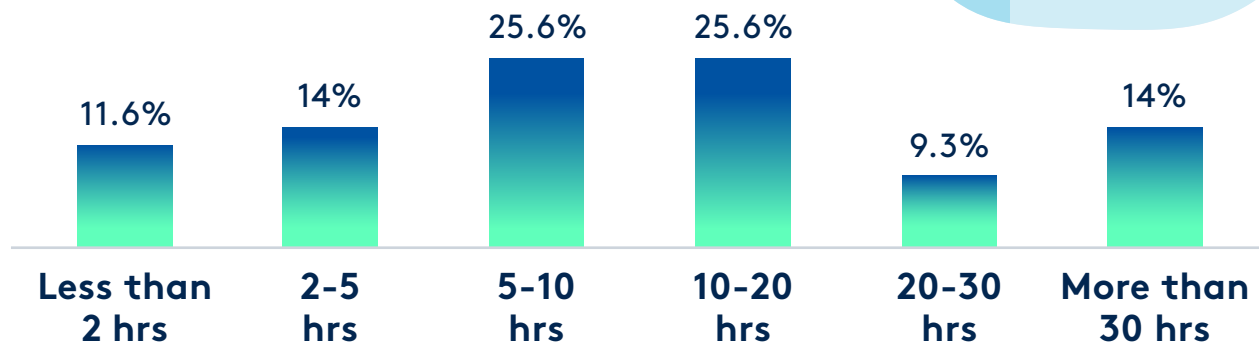
DISTRIBUTION OF SPENDING

Purchasing new games was the highest spending item for 52% of casual gamers.



HOURS SPENT PLAYING

The majority of Casual and Professional gamers can spend up to 20 hours of gaming per week.



03.3 Revenue Generation

INCOME

In this section of the report, we’re exploring the professional side of the gaming industry with a focus on Professional Gamers and Game Developers.

33% of professional gamers acquired some form of income from content streaming and tournament winnings. However, the emerging professional gaming industry remains largely unfinanced, with 58% of respondents disclosing that they haven’t generated any consistent or sporadic income from gaming professionally.

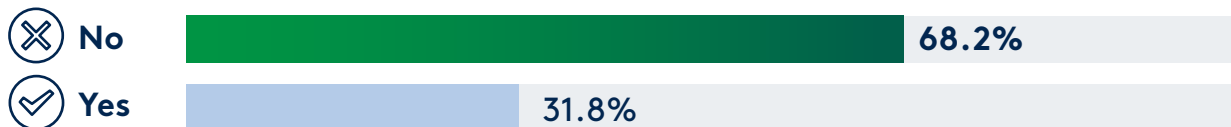
While a striking 68% of surveyed game developers do not make a

regular income from their work in the sector, 7% of respondents generated an average salary between SAR 50K-70K, and 10% generated more than SAR 70K yearly.

The top revenue generators for the surveyed industry professionals were employment income (18%), content streaming (9%), and royalties from a published game (5%).

The majority of surveyed Game Developers remain largely unfinanced.

Do you generate any income from the gaming industry?



6.8%

of surveyed game developers generate SAR 130,000+ annually

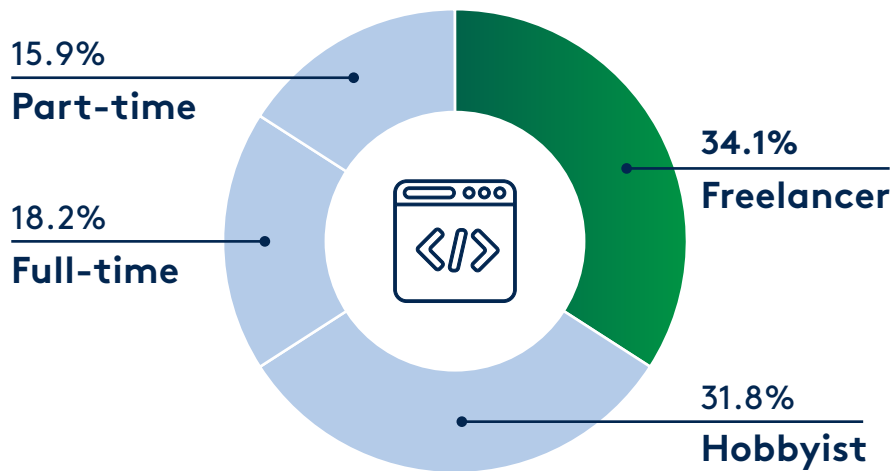
03.4 Skillset and Skill Building

YEARS IN THE INDUSTRY & LEVEL OF COMMITMENT

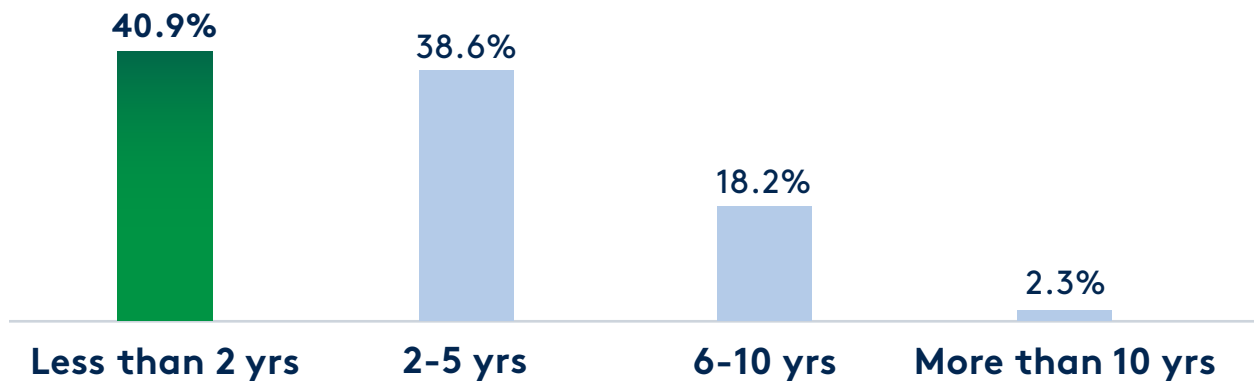
The game developer community in Saudi remains fairly nascent, as the lion's share (39%) of industry professionals surveyed in this research had 2 to 5 years of

experience in their respective fields, 18% had between 5 and 10 years of experience, and only 1 respondent has been in the industry for more than 10 years.

The majority of surveyed Game Developers are independent contractors.



The majority of surveyed Game Developers have up to 5 years of experience in their respective fields.

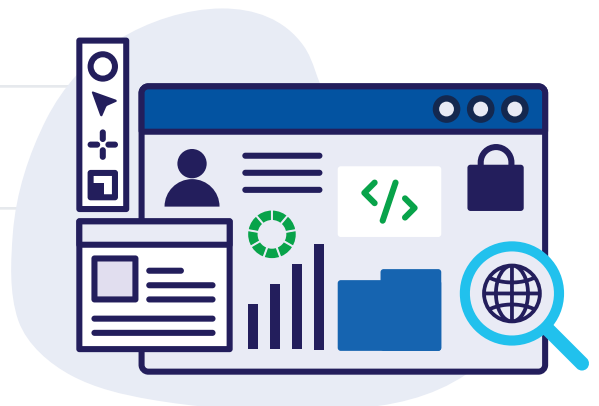
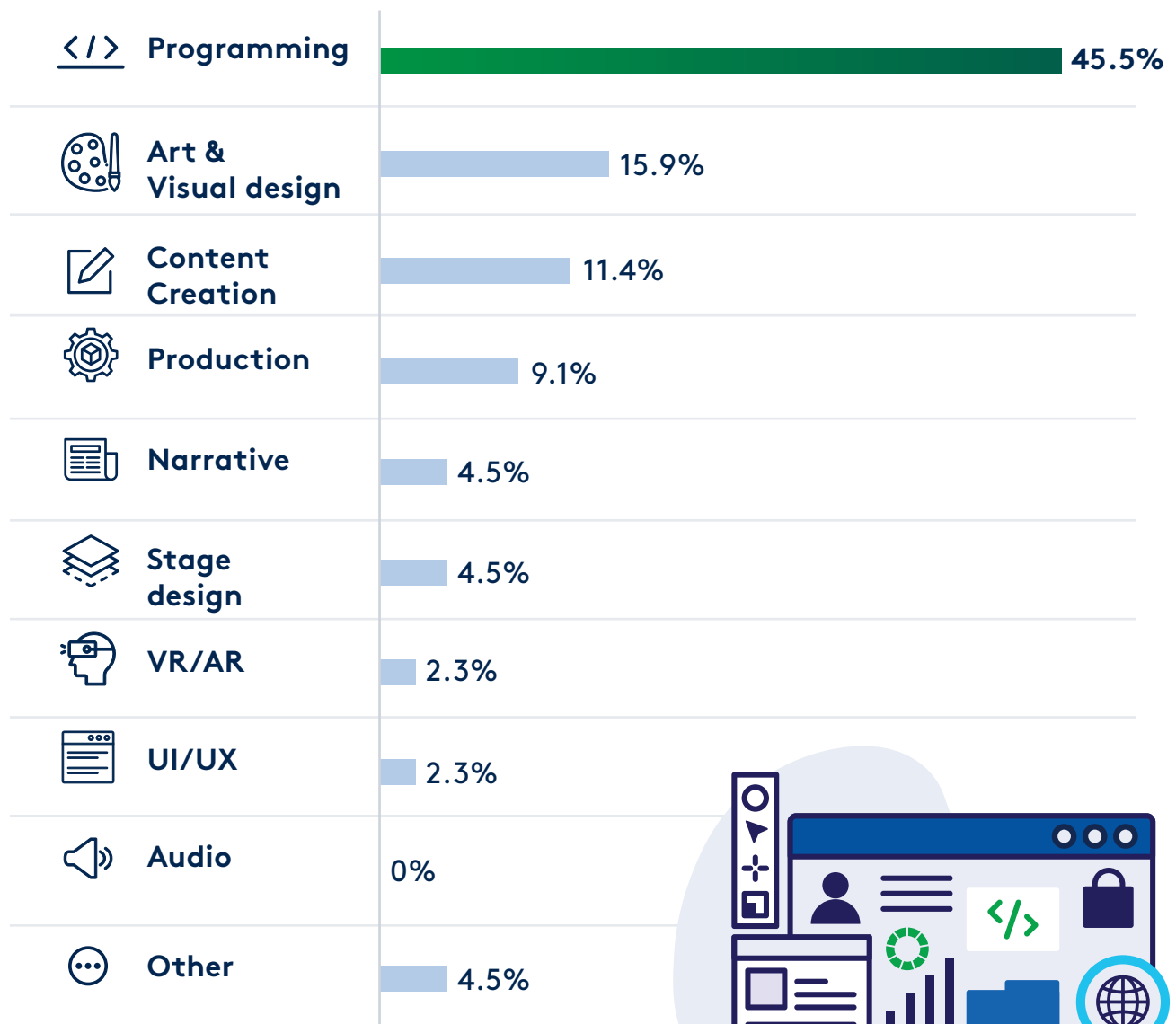


AREA OF EXPERTISE

While most industry professionals surveyed (46%) were software developers, it's interesting to note that 16% of professionals worked in art direction and graphic design,

12% worked in content creation, and 10% worked in content production.

The majority of surveyed Game Developers are software developers.



MEANS OF ATTAINING EDUCATION

While more than half of all survey respondents (52%) have acquired their technical skills through self-learning, 46% of surveyed game developers have pursued some form of technical or alternative education in game development.

Respectively, 34% of surveyed industry professionals acquired their knowledge through bootcamps and online courses, as well as peer-to-peer learning environments. Only 7% of surveyed industry professionals acquired higher education degrees in their respective fields locally, and 5% acquired their diplomas abroad.

More than half of surveyed Game Developers are self-taught.



Are self-taught



Have taken courses, not through an educational institution (online courses, bootcamp, etc.)



Have attended an educational institution in Saudi Arabia (university, institute, etc.)



Have attended an educational institution abroad (university, institute, etc.)



Have learned from peers and online communities



Other



03.5 Culture and Career Sentiment

GAMING PRIORITY

Building skills in their game of choice was voted as the top priority by the majority of surveyed Professional Gamers.

Highest Priority

- 1 *Build up your skills in your game of choice
- 2 Learn new technical skills
- 3 Securing a brand sponsorship
- 4 Meet with local and/or international gaming community
- 5 Winning a global gaming competition
- 6 Winning a local gaming competition

Least Priority



41.7%

Build up your skills in your game of choice



04

Market Outlook



04.1 Opportunities and Challenges

ANTICIPATED OPPORTUNITY

In this section of the report, we explore the market outlook and overall sentiment of the gaming community in Saudi Arabia (gamers & game developers) to understand the market's current challenges, opportunities, and needs.

The sentiment around the evolution of the gaming industry in Saudi Arabia remains largely positive, where 81% of surveyed respondents expressed they were highly optimistic or optimistic to a certain extent about the Saudi gaming industry over the upcoming year.

In this regard, 35% of survey respondents believe that government support is the biggest opportunity for the local gaming sector over the next 5 years. While 34% of respondents believe that an influx of investment in local game development will be equally impactful at the time being.

Developing new games was voted as the most anticipated opportunity for the Saudi mobile gaming industry in 2023



Developing new games
23%



Investing in existing games
8%



Game related technology
8%



All of the above
61%

OBSTACLES

Lack of funding was voted as the top obstacle for the gaming industry for this year.

Most Urgent



- 1** Lack of funding
- 2** Access to target market
- 3** Difficulty in securing publishers
- 4** Securing a brand sponsorship

Least Urgent



39.1%
Voted 'lack of funding'
as most urgent.



04.2 Investment Landscape

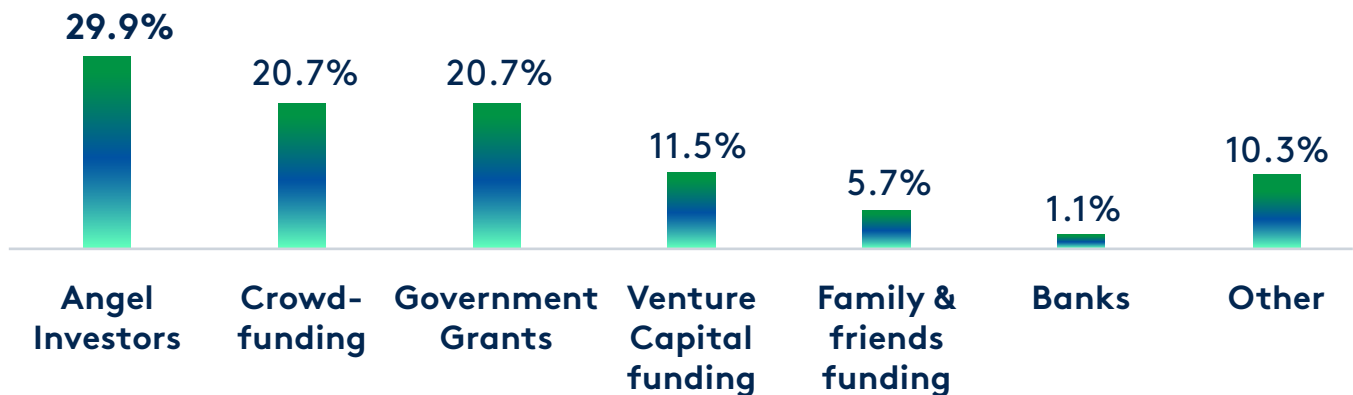
GAME DEVELOPMENT FUNDING SOURCES

While 54% of survey respondents believe that investment in gaming has significantly increased but is yet to match the full potential of the gaming sector in Saudi Arabia, the Saudi gaming community follows funding preferences suitable of a promising emerging market.

Showing significant financial maturity and awareness, more than half of survey respondents (51%) preferred institutional funding over alternative financing for local game development. In relation to this, a significant majority of respondents (30%) preferred to acquire an investment in their games through angel investors, while 21% of respondents preferred to get funded by a government entity.

Interestingly enough, the gaming ecosystem in Saudi Arabia also gravitate towards community-based financing alternatives, where sources like crowdfunding (21%), friends & family (6%), and personal financing (2%) were also viable funding options.

Angel Investment and Crowdfunding were the two most popular funding sources, according to the 130 survey respondents.



GOVERNMENT SUPPORT

The most recent acquisitions, fund launches, and national gaming programs announced by the government of Saudi Arabia have gained momentum amongst the local gaming ecosystem. 35% of survey respondents believe that government support is the biggest opportunity for the local gaming sector over the next 5 years.

These recent initiatives gained the significant confidence of gamers and game developers in the kingdom, as 60% of respondents replied with

positive sentiment towards the government support of the gaming sector.

With Saudi doubling down on positioning itself as a global center for electronic gaming under Vision 2030, 75% of survey respondents had a firm knowledge of at least one government initiative supporting the gaming industry.

60% of survey respondents are satisfied with the government's support of the gaming sector in 2023.



75% of all surveyed respondents had firm knowledge of at least one government initiative supporting the gaming sector in Saudi Arabia.

Are you aware of any initiatives that are supporting the gaming industry?



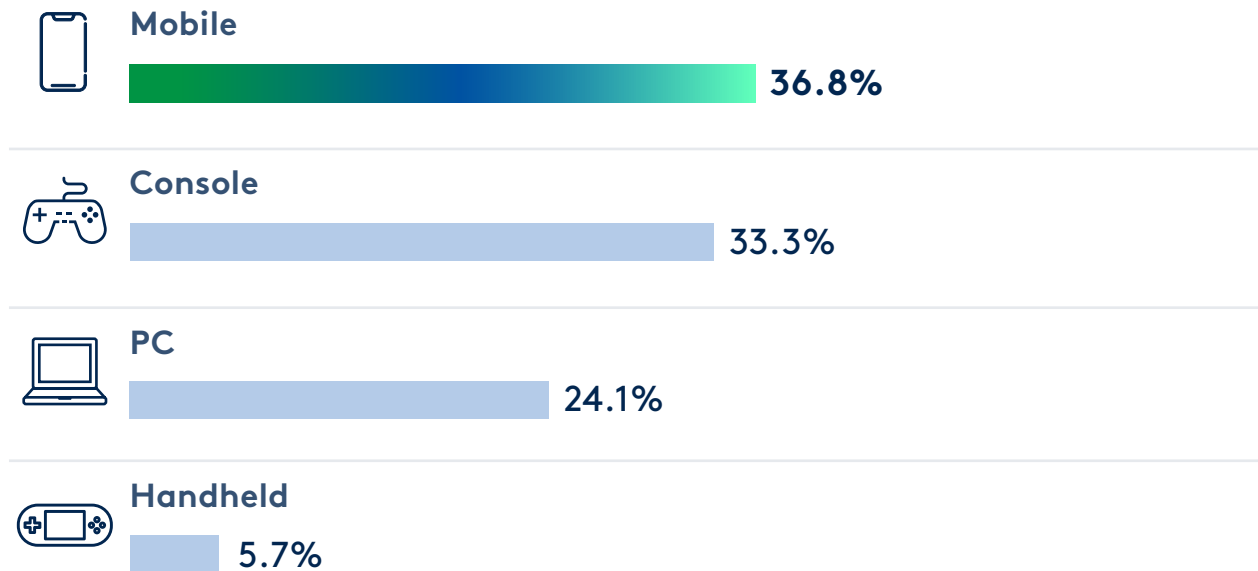
MOBILE GAMING

An untapped opportunity is significantly present in the Saudi mobile game development market. A substantial portion of survey respondents (37%) consider mobile games to be the most popular in Saudi Arabia.

While more than half of survey respondents (51%) perceive a considerable demand for locally

developed mobile games, this opportunity remains unexploited. Notably, 34% of respondents feel that there is still a low level of awareness and interest in mobile game development, while 32% of those surveyed believe that the level of competition is low.'

Mobile gaming was voted as the platform with the most potential for growth locally in 2023.



Over half of survey respondents believe that there is a significant demand for locally developed mobile games in the Kingdom.

Do you believe there is a demand for locally developed mobile games?



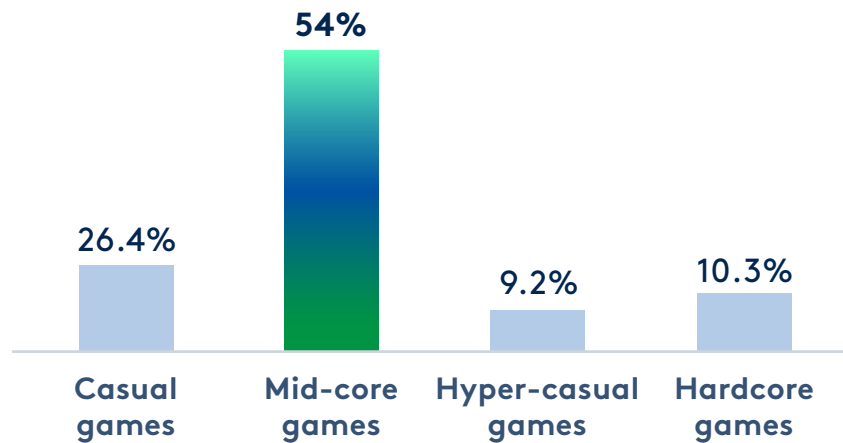
OPPORTUNITIES FOR SAUDI MOBILE GAMES

While 61% of all respondents believe that the Saudi gaming industry should be able to focus on all aspects of local game development, including the investment in the development of current games and the development of gaming technologies, A considerable percentage of respondents (23%) believe that the biggest opportunity

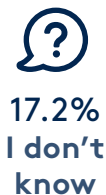
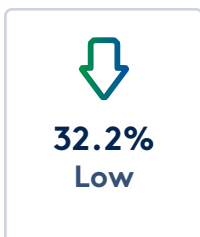
lies in developing and introducing new mobile games to the market.

In this context, 80% of survey participants are of the view that Saudi Arabia's local game development industry should channel investments into casual (26%) and mid-core games (54%).

Mid-core mobile games was voted as the genre with the most potential for local development by over half of survey respondents.

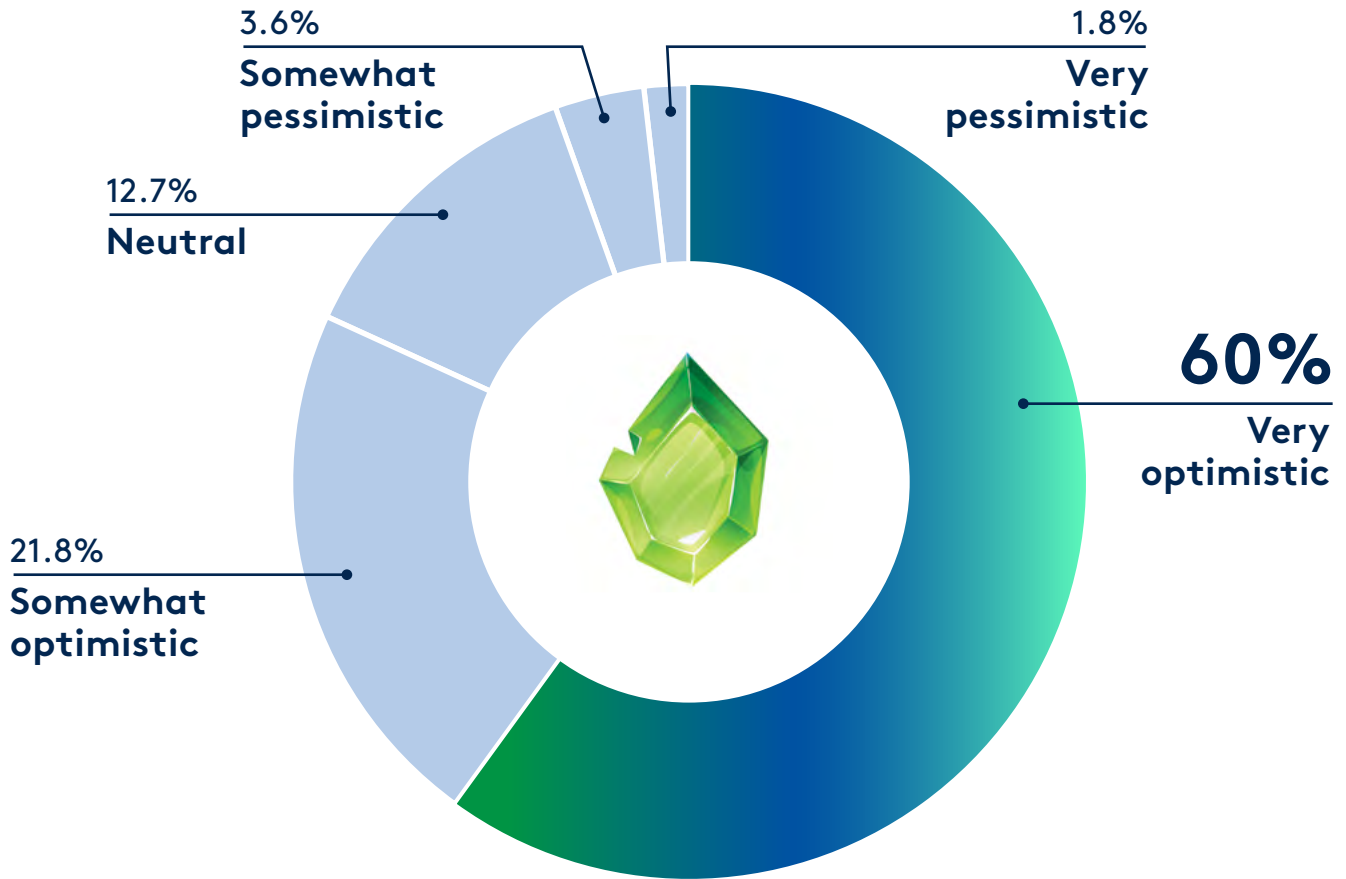


The majority of survey respondents believe that the level of competition in the local mobile game market in the Kingdom is fairly low.



OVERALL SENTIMENT

60% of survey respondents are very optimistic about the Saudi gaming sector for the upcoming year.



05 Case Studies



UMX Studio

The Pioneers Who Climbed All Sand Dunes

Back in 2014, as the mobile gaming industry was only beginning to bloom, UMX emerged on the scene. A rapid expansion in mobile gaming, combined with the untapped potential of unique GCC content, propelled UMX to innovate and disrupt the market. After meticulous market research, they opted to create a racing game, discerning its latent potential. Despite the constraints of limited resources and talent, UMX's inaugural game exceeded expectations, rising to become the top-ranked game in over 100 countries within just two months of its release. Ali, as the sole driving force at the time, expertly navigated all components of the company's operations - from game development and design, to business expansion.

As UMX's success continued, Ali recognized the need to expand the team and bring in more skilled individuals. However, finding local talents in the gaming industry proved challenging. Ali resorted to hiring freelancers and collaborating remotely in the early days of UMX (2014-2015). Over time, UMX built a team of 70 members with physical offices full time and a headquarter



Ali Alharbi

Founder & CEO
UMX Studio

“

There is a movement happening in the gaming industry, and such movements are usually beneficial.

I believe that very soon, there will be a quick and impactful transformation in the gaming industry.

My advice for beginners is to start small and keep learning, this is what we do at UMX.

in Riyadh. Ali emphasized the scarcity of supporting services such as voice actors, audio technicians, and animators in the region. UMX had to rely on external companies to fill these gaps, highlighting the need for the development of such services within the MENA gaming industry.

Ali emphasized the significance of the game business aspect in the industry, which is often overlooked. Many developers in the region focus solely on creating games without considering the commercial aspects, such as budgeting, revenue streams, and profitability. Ali stressed the importance of cultivating a game business mindset from the beginning, ensuring studios are sustainable and can navigate the challenges of financing and market demands. UMX adopted a “start small” approach, gradually growing its team and resources. They focused on generating profits through in-app purchases and advertisements based on players’ segmentation rather than relying on funding opportunities at the beginning of 2018. By concentrating on their core competency of racing games, UMX carved a niche for themselves in the market. Ali shared an example of another studio that diversified into a new genre and faced difficulties. This experience reinforced UMX’s decision to stay true to their specialization,

understanding the importance of brand recognition and meeting audience expectations.

Ali expressed optimism about the future of the Saudi gaming industry, given the increasing interest and investment from various sectors. He advised aspiring developers to start small, continue learning, and seek guidance from experienced professionals. He believed that the industry will undergo a transformative phase, leading to significant advancements in the MENA gaming landscape.

About UMX Studio

UMX Studio is one of the leading mobile game developers in the MENA region. Debuting in 2014, its flagship Car Game, “Climbing Sand Dune,” rapidly became a global sensation reaching the top of the app stores and Play Store within 12 hours of its release! UMX Studio now boasts more than 70 Million downloads and 2.7 Million monthly active users worldwide.



Founded in 2014



**70 Million
App Downloads**



**2.7 Million
Active Users Monthly**

Starvania Studio

Accelerators as a Launchpad for Success

Starvania Studio is a Saudi Arabian video game development studio that has quickly made its mark in the industry. The studio was established in 2020 by Meaad Aflah and Game Designer Muslih Alzahrani, who gained knowledge and skills from participating in the Saudi MCIT's Game Changers, an accelerator program that focuses on the business and technical aspects of building local game studios. Aflah used the program as a stepping stone to establish Starvania Studio, which has contributed to the doubling of the number of active gaming studios in the Kingdom.

Aflah had the opportunity to collaborate on a multiplayer game, Kabsa, during the Game Changers program, which allowed her to experiment with world-building and create a captivating fantasy and adventure setting for the video game format. Through the program, Aflah learned the importance of game design, which focuses on playability and creating a fun experience. Game designers play a key role in the game development cycle.



Meaad Aflah

Co-Founder & CEO
Starvania Studio

“

We are better-established now than any time before.

Because of these accelerators, we gained a lot of exposure. This, I think, was great for Starvania.

In addition to Game Changers, Meaad participated in three other accelerator programs to fast-track the growth of Starvania and position the studio as an influential member of the ecosystem. The accelerators offered insights into different aspects of the game development process. Aflah is currently midway through the NEOM Level Up accelerator, which promises a considerable boost in support for the sustainability of its participants' companies. As a benefit of Starvania's participation in NEOM Level Up, the studio was granted a financial incentive and the chance to relocate to NEOM's gaming hub.

Starvania is currently in the building phases of developing its flagship game, Bahamut, a 2D action-adventure game set in a fantasy world inspired by Arabian mythology. Starvania strives to create worlds and adventures "beyond the horizon" starting close to home by building Bahamut's characters rooted in Arab Mythology.

About Starvania Studio

Established in 2022, Starvania Studio is one of the game studios emerging out of the Saudi MCIT Game Changers Accelerator in partnership with AstroLabs. Since 2022, and with Co-founder and CEO Meaad Aflah's astute leadership, Starvania has been cementing their position as one of Saudi Arabia's most promising game studios.

The launch of Starvania's momentous journey was a pivotal moment for Meaad, who in 2022 decided to leave her full time employment and relocate to Riyadh to focus on her passion project: building her own game development studio. A risky step that would later pay off largely.



Founded in **2022**



1 of 4 Studios in NEOM Level Up Accelerator



5+ Team Members

Nine66

A Global Approach to Local Gaming

Within Nine66's extensive scope of operations, its publishing, and expansion services remain a stronghold for global companies and developers to effortlessly access MENA markets, providing several benefits for local talents and stakeholders in the process.

The most evident and immediate outcome is boosting employment rates for Saudi locals. Global companies that expand to Saudi Arabia are creating specialized job positions where local talents can grow, innovate, and shine internationally. The potential for international partnerships also increases, with collaborative projects between local game development companies and global studios.

Investors are key beneficiaries of these expansion activities as well. The Kingdom is home to a vast and exceptionally active base of video game consumers. This makes it a profitable market for the local investors eyeing global studios for secure, low-risk investment opportunities, and for the studios themselves as they grow their reach in a high-demand market.



Nasser Bin Rubayan

Program Manager
Nine66

“The Kingdom is home to a vast and exceptionally active base of video game consumers.

This makes it a profitable market for the local investors eyeing global studios for secure, low-risk investment opportunities.

Nine66 is laying the groundwork for a surge in localized products and content. As global studios venture into the Kingdom, they encounter a unique customer base, each with their own distinct preferences and attitudes.

As such, the proximity of local and global game developers in the Kingdom is a fertile environment for mutually beneficial collaborations. Saudi talents can assist expanding studios through localization service (market research, translation, user experience and gameplay adaptation, beta testing, etc.).

In the process, local game developers would be honing their skills and technical abilities under the mentorship and guidance of international entities. As a result, the pool of Saudi talents gains quality experience in designing and delivering products that are impactful and competitive on a global scale.

About Nine66

As part of Savvy Games Group, Nine66 was created to fulfill a number of purposes in the gaming and esports ecosystem. Its mission is to instill a supportive environment for industry professionals, and ensure plenty of opportunities for growth and success.

Nine66's strategy is well-rounded, covering aspects such as building an advanced tech infrastructure, and securing employment opportunities and advisory assistance for local talents. They also focus on fostering a bold and ambitious community of game developers through engaging events.



Founded in **2022**



1 of Savvy Games Group Subsidiaries



#1 PocketGamer's Top MENA Game Makers 2022 List

PLAYHERA

Global Esports in the Kingdom

A pioneer in the Esports scene, PLAYHERA adopted a meticulous approach to launch its services which now include a Tournament Management System, an Eshop, and various support services to players. Each touchpoint with the gamer was perfected, ensuring the best value and experience before introducing the next offering.

Gaming has always been embedded in Saudi society, and the inclusion of Esports in Saudi Vision 2030 has provided an opportunity to showcase hidden talents to the rest of the world and attract a spike in global and local stakeholders. Saudi gamers have proven their competitiveness in various international games, such as FIFA and Rocket League. For example, in PUBG Mobile, Saudi players are known for their aggressive play style, with many MVP players hailing from Saudi Arabia within the MENA region.

PLAYHERA has successfully built a community of over 200K gamers in the MENA region and has successfully expanded into other markets like Japan and Europe. The platform not only provides uninterrupted tournaments but, more importantly, fosters a supportive environment for Esports champions like Saudi FIFA champion and 3-time global qualifier



Fahad Almaghrabi

Chief Marketing Officer
PLAYHERA

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With the focus on Esports at a global and local level nowadays, the Saudi Esports industry is heading in the right direction,

but building the next generation of gamers is the true gamechanger!

Ahmad Mujjahed to emerge and conquer globally. Becoming players' favorite platform, their tournaments, such as the PLAYHERA Dream Series, attract more than 27,000 players, with the promise of valuable monetary prizes from an annual prize pool of over SAR 1,000,000.

While PLAYHERA's 876% growth of tournament players since launching has been uncharted territory for Saudi Arabia, the company's inclusive and base-building approach to Esports has been a largely defining attribute. By involving the gaming community and pro players in building the Esports calendar and their own tournaments, PLAYHERA has increased its reach and registrations significantly. While on par with the global popularity of tournament players in the 16-26 age range, PLAYHERA has been recording a promising interest of above 30 years old casual players who are joining tournaments for fun.

While the focus on Esports is prevalent, PLAYHERA recognizes the importance of building the next generation of gamers. While enabling current gamers to upskill and continue their journey, PLAYHERA runs community tournaments to help new gamers catch up and remain on par with

the global industry standard. Cloud gaming is one of the key services offered by PLAYHERA, enabling gamers without advanced setups to compete with others from anywhere and anytime.

About PLAYHERA

Founded in 2018, PLAYHERA is a gaming and Esports network enabling the gaming landscape to flourish in Saudi Arabia.

Recognizing the underserved gap of platforms for local gamers to connect and compete and weighing it against the backdrop of an expansive opportunity in Saudi Arabia's competitive low-latency gaming, PLAYHERA emerged as a vision to create a one-stop-shop that caters to the needs of regional and global gamers, starting with a world-class tournament platform.



Founded in 2018



200,000 Active Users in MENA



SAR 1M+ Annual Prize Pool

Ahmad Mujjahed

Saudi's National Champion Beats All Odds

After achieving a high ranking in 2021, Abu Makkah realized his potential as a professional player. Winning tournaments organized by PLAYHERA and Zain Esports boosted his confidence, leading him to take the leap into the professional gaming scene. Abu Makkah's love for the game and his determination to succeed fueled his decision, despite the challenges that lay ahead.

One of Abu Makkah's greatest challenges was finding a balance between his studies and his professional gaming career. While pursuing a major in business accounting, he had to put his gaming career on hold. However, the quarantine experience in 2021 provided an opportunity for him to dedicate more time to both his studies and gaming. Abu Makkah's determination paid off, as he successfully graduated and most recently claimed his place as Saudi's national FIFA champion after winning the eSPL Tournament.

Joining TwistedMinds early in his professional career proved to be a game-changer for Abu Makkah. The team provided him with moral, financial, and personal support,



Ahmad Mujjahed

FIFA National
Champion

“

Globally, I believe that Saudi players compete highly in games like Rocket League and Overwatch, for example. But as far as the game goes, we have the best FIFA player in the world.

allowing him to focus on his performance. The ambition and dedication of TwistedMinds aligned perfectly with Abu Makkah's goals, making him feel supported and confident in his career path.

Having a coach who understands his style and provides a comfortable environment is crucial for Abu Makkah's growth. Coach Hafez, a friend turned coach, brings a wealth of knowledge and experience to the table, helping Abu Makkah refine his skills and tactics. This personalized coaching approach has proven instrumental in enhancing his performance.

Abu Makkah believes that Saudi players excel globally in many games, yet in FIFA, Saudi boasts the world's best player, Mosaad Al Dossary. He believes that the passion, ambition, and determination of Saudi players have allowed them to compete at the highest level. Although local support and infrastructure may lag behind global standards, the growing recognition of Esports in Saudi Arabia is truly changing the landscape.

About Ahmad 'Abu Makkah' Mujahhed

Ahmad Mujjahed, popularly known as 'Abu Makkah', is a rising star in the world of Esports. He has managed to carve a niche for himself as a top-ranking FIFA player in the Middle East, making significant strides in his professional gaming career. Competing at a local level at the end of 2021, Abu Makkah quickly climbed the ranks to qualify for the FIFA Global championship twice and, more importantly, claim his position as the national FIFA champion in 2023 after winning the eSPL tournament organized by the Saudi Esports Federation.



2023 eSPL Champion



X3FGS Qualifier



X2 Top FIFA Player in MENA

06

Appendix



About AstroLabs



ASTROLABS

AstroLabs is an ecosystem builder that enables the growth of people, companies, and innovation capacities on a regional level.

With 10 years of active ecosystem building, AstroLabs is MENA's trusted partner in solving the innovation challenges of tomorrow by navigating the entrepreneurial landscapes of today.

Partnering with key industry experts, including governmental entities, corporates & enterprises, and the entrepreneurial ecosystem, AstroLabs designs and facilitates ecosystem transformations through business expansion and market entry operations, SME ecosystem building, as well as industry-wide digital upskilling, entrepreneurship, and innovation programs.

Our mission in Saudi Arabia over the past decade has been to support the effective transformation of emerging industries. This is done meticulously through building entrepreneurial capabilities,

amplifying innovation capacity, and working closely with key stakeholders on bridging global knowledge and technology with local entrepreneurship.

350+

Companies accelerated

1,500+

SMEs engaged

1,000+

Companies expanded to MENA

35+

Innovation programs ran

About IMPACT46



Founded in 2019, IMPACT46 has quickly established itself as a leading venture capital firm in the Kingdom and gained the distinction of being one of the first asset management companies to be authorized by the Capital Market Authority (CMA).

With a primary focus on investing in tech startups, the firm operates as both an asset management and arrangement advisory firm. The majority of IMPACT46's portfolio consists of Saudi-based ventures, reflecting its commitment to supporting the local ecosystem.

The name "IMPACT46" comes from Riyadh – the city in which it is based – which lies on the 46th longitudinal line of the planet. From this location in the heart of Saudi Arabia, the firm extends its reach to every corner of the Kingdom, investing in those who aspire to make a lasting impact.

35+

Portfolio companies

SAR 650M+

Invested

SAR 3.2B+

Assets under management

Published by



IMPACT46

In collaboration with

PLAYHERA

