SAUDI ARABIA
MEDIA SCENE

A Market Intelligence Report — 2026 Edition

Prepared by Hadi Jawad Kadhem

hadi@luminaplus.me

www.luminplus.me

Why this report exists

The Saudi media and consumer landscape has changed more in the past decade than in the fifty years before it. Cinemas reopened. Streaming overtook linear television. A creator economy now moves faster than most brands' quarterly planning cycles. Ad budgets that once lived almost entirely in broadcast now compete across a dozen digital channels, each with its own audience, tone, and seasonal rhythm.

This report exists to give agencies, brand teams, and market entrants a single, current, publicly-sourced picture of that landscape — organized not as a data dump, but through five lenses that mirror how a market actually behaves: its Economy, its Society, its Culture, its Entertainment habits, and the Opportunity that follows from understanding all four together.

The headline picture, at a glance

38.0M	4.6%	89%	$38.5B
Population — young, connected, growing	Forecast GDP growth, 2026	Use at least one streaming service	Creator economy market size, 2025

Saudi Arabia is simultaneously one of the most digitally saturated markets in the world and one of the fastest-diversifying economies — a combination that rewards brands willing to move at the market's pace, not their own. The sections that follow unpack each dimension of that opportunity in depth.

WHAT'S INSIDE

Five lenses on one market

SECTION 01

Economy

The growth story behind consumer spending power

Growth is re-accelerating, led by non-oil sectors

4.6%

Forecast real GDP growth, 2026 — up from 4.4% in 2025

+5.0%

Non-oil sector growth (2025), the primary engine behind the headline number

$4.0B

Saudi digital ad spend (2025), projected to reach $8.0B by 2029

$3.0B

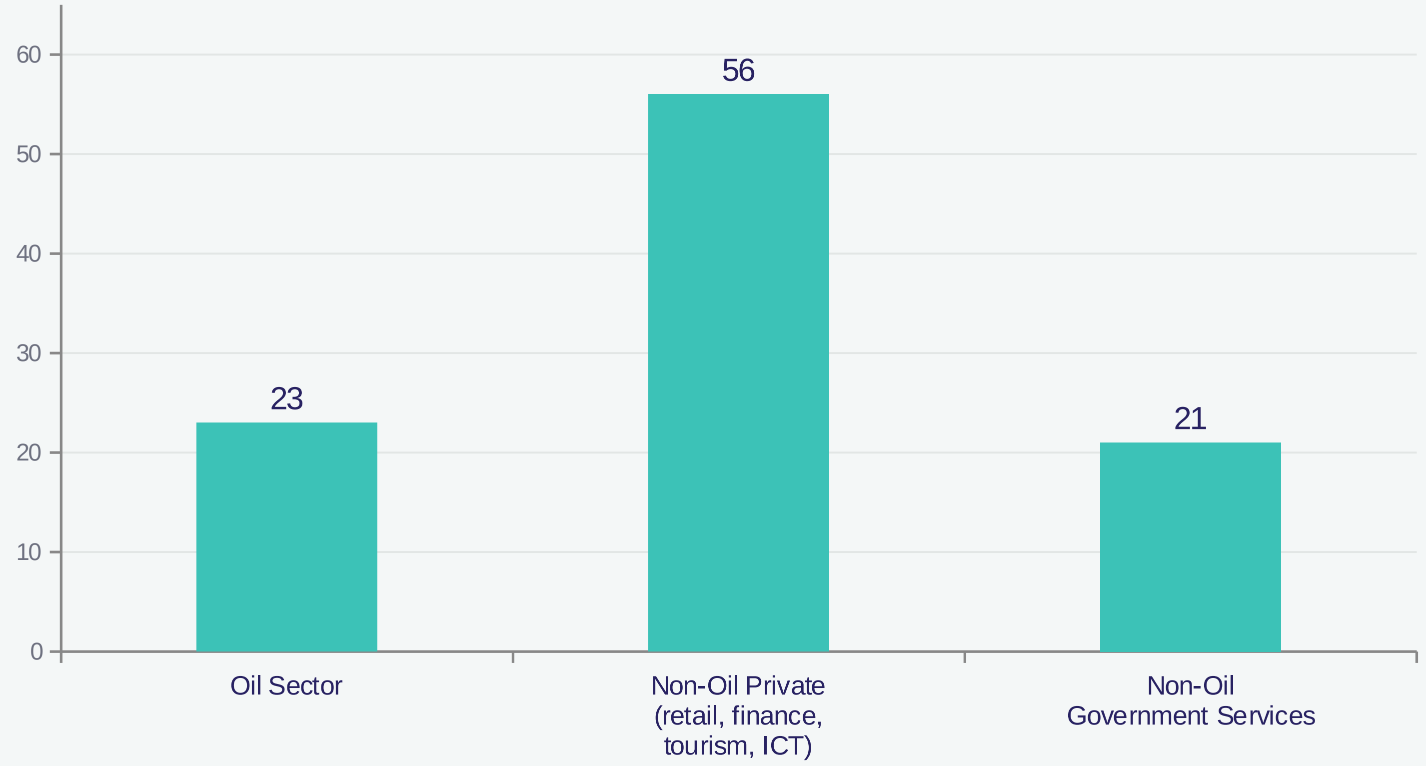
Total marketing & advertising agency market (2025)

Budgets are shifting from broadcast and print toward performance-driven digital and social — a direct reversal of the TV-dominant landscape of a decade ago.

Sources: Saudi Ministry of Finance pre-budget statement 2026; KPMG Saudi Arabia Budget Report 2026; Research and Markets Digital Ad Spend Databook; Mordor Intelligence.

For the first time, non-oil activity is more than half of GDP

Approximate share of nominal GDP, narrow definition (2025)



Fastest-growing lines

Social services (health, education, entertainment): +10.8%

Transport & communications: +7.3%

Trade, restaurants & hotels: +7.0% — now the largest single non-oil segment by absolute size, lifted by record tourism inflows.

Sources: GASTAT national accounts (2025 rebasing); Vision2030.ai GDP tracker; Gulf News (non-oil GDP landmark report).

1

ECONOMY

Tourism has become a genuine growth engine, not a talking point

122M	**$80-90B**	**~5%**	**27M+**
Domestic & international visits (2025)	Total tourism spending (2025)	Direct tourism GDP contribution today — targeted to reach 10% by 2030	Tourist visas issued in 2025, up from near-zero pre-2019

This growth sits alongside the largest construction pipeline in the world — NEOM, the Red Sea Project, Diriyah, and Qiddiya — which is steadily converting from capital spend into revenue-generating tourism, retail, and entertainment assets.

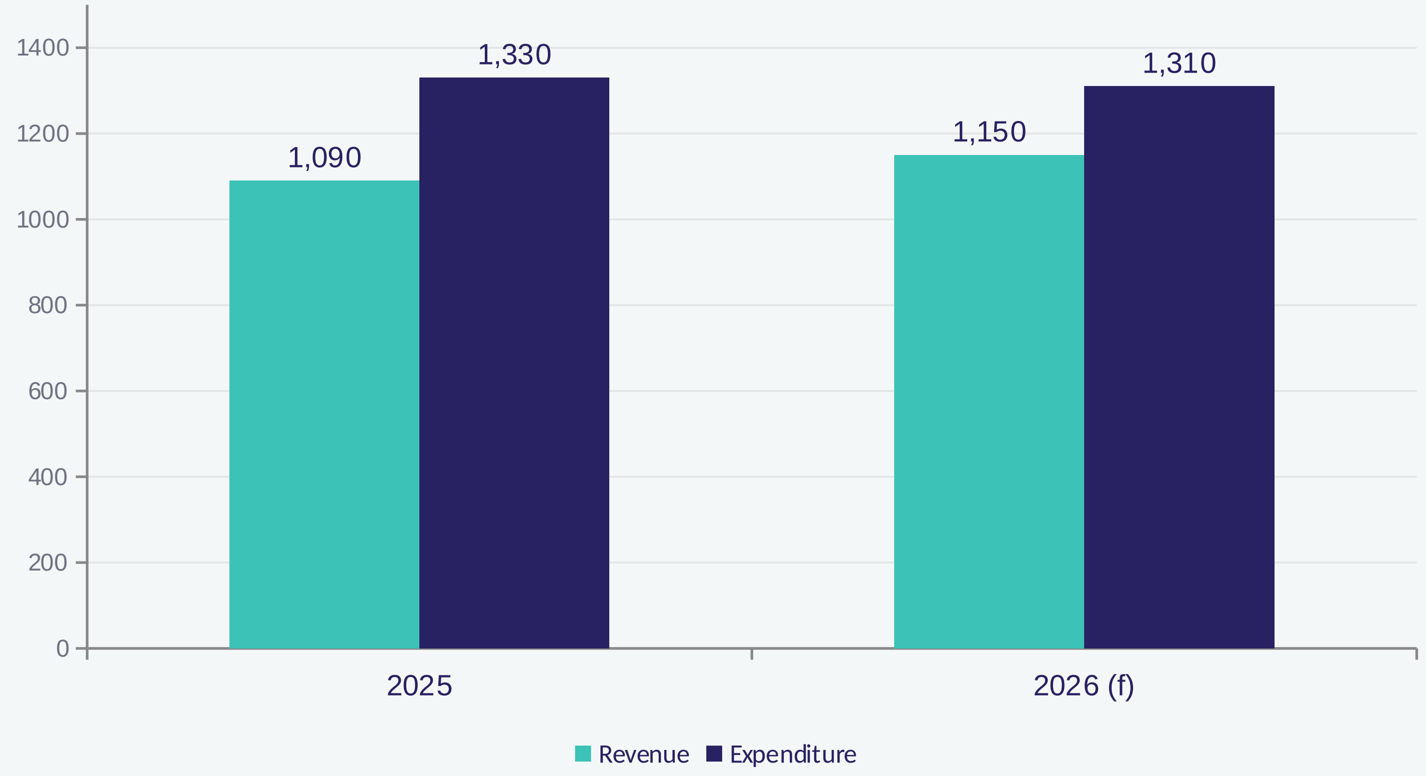
Sources: World Travel & Tourism Council (WTTC) 2026 forecast; Vision2030.ai economic diversification tracker; The Middle East Insider.

1

ECONOMY

The fiscal deficit is real, but narrowing on purpose

Government revenue vs. expenditure, SAR billions



The trajectory

2025 deficit: SAR 245B (5.3% of GDP)

2026 deficit: SAR 165B (3.3% of GDP)

2027 (f): SAR 120B

The government is deliberately front-loading spending on Vision 2030 mega-projects — a long-return investment choice, not distress borrowing.

Sources: Saudi Ministry of Finance pre-budget & budget statements; KPMG Saudi Arabia Budget Report 2026; AGSI analysis.

What this means for brands

Consumer spending power is growing faster than the headline oil story suggests. Budgets tied to household consumption — retail, hospitality, entertainment, digital services — sit on the fastest-growing part of the economy, not the slowest.

SECTION 02

Society

A young, connected, and fast-growing population

One of the youngest, most connected populations in the world

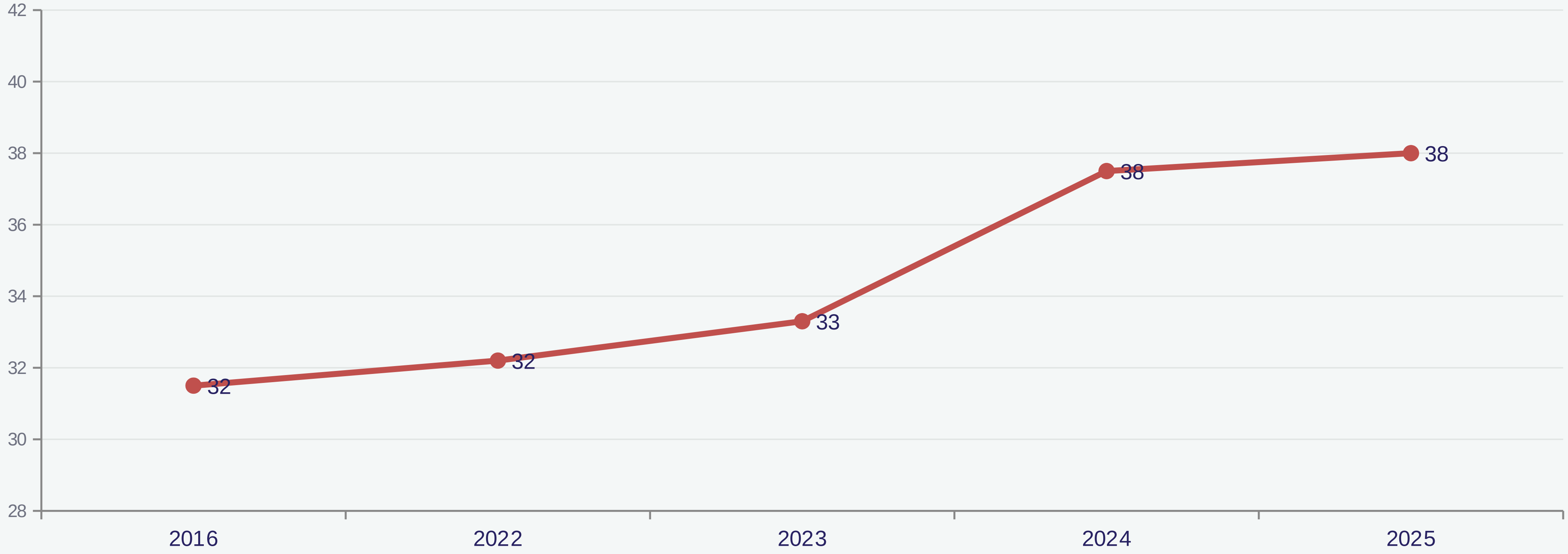
38.0M	69.4%	~100%	82.7%
Total population (2025) — up ~21% from 31.5M a decade ago	Share of Saudi nationals under age 35	Internet penetration — among the highest in the world	Active social media penetration (% of total population)

A young population with near-universal connectivity means digital-first is no longer a strategy choice for brands entering KSA — it's the default starting point.

Sources: GASTAT / SPA (2024-25 population & youth data); Macrotrends; ITU/World Bank via Mappr; DataReportal — We Are Social, Digital 2026.

A decade of consistent population growth

Total population, millions



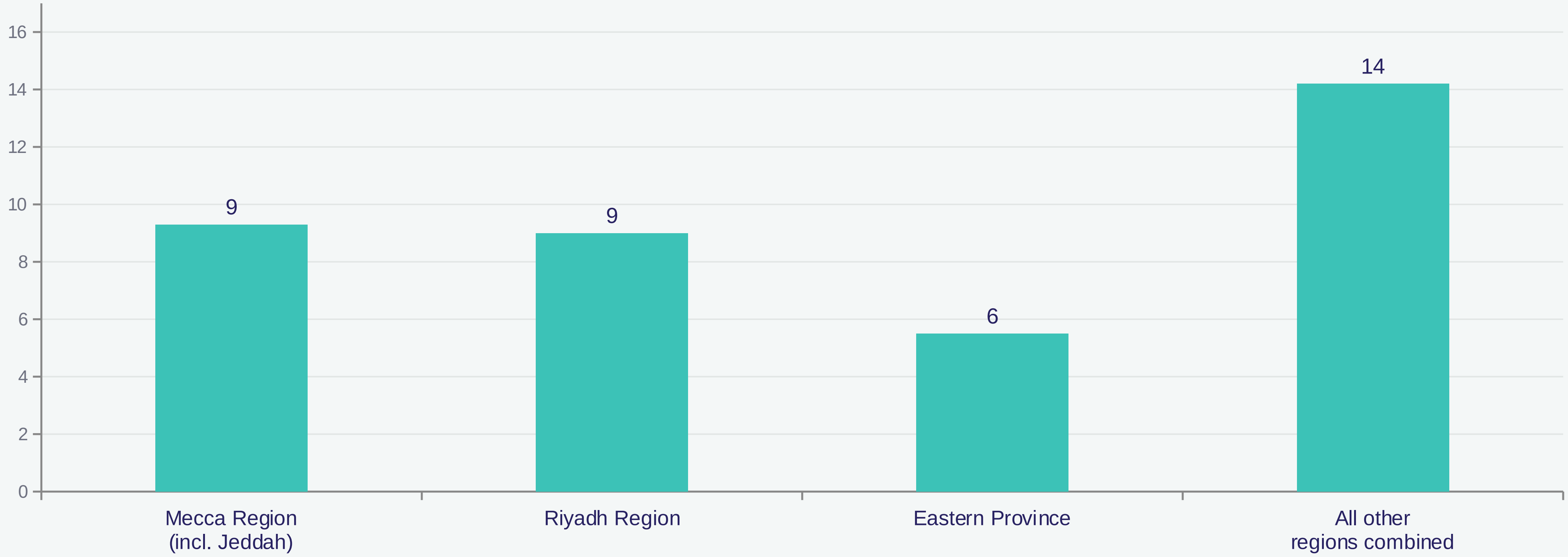
Sources: Original 2016 report baseline; Macrotrends (2022-2025 series, midyear estimates).

2

SOCIETY

Population concentrates in three regions

Estimated population by region, millions (2025)



Mecca, Riyadh, and the Eastern Province together hold roughly 64% of the national population — a useful lens for any media plan weighing national reach against concentrated urban spend.

Source: GASTAT 2025 regional population estimates, via World Population Clock analysis.

2

SOCIETY

The workforce — and the wallet — are both changing shape

35%

Female labor force participation (2025) — nearly double the ~17% of 2017

7.2%

Unemployment rate (Q4 2025), down from over 12% in 2017

79%

Non-cash retail payment share (2024), up from 70% in 2023

A rapidly growing share of working women, falling unemployment, and near-universal digital payments together mean household purchasing decisions — and how they're made — look meaningfully different than they did even five years ago.

Sources: Vision2030.ai KPI trackers (female labor force participation, unemployment); SAMA monthly bulletin via Giraffy expat statistics.

What this means for brands

Household decision-making is no longer a single-earner, single-decision-maker model. Media plans built on outdated household assumptions will systematically misjudge who the actual purchase decision-maker is.

SECTION 03

Culture

A decade of lifestyle and entertainment evolution

Everyday life has opened up dramatically since 2016

2018

Cinemas Reopen

After a 35-year gap, commercial cinemas return to the Kingdom

2018

Driving Access

Women gain the right to drive, expanding everyday consumer mobility

2019+

Live Events Mainstream

Concerts, festivals, and mixed-gender venues become part of routine life

2030

SAR 90B Entertainment Market

Household entertainment spend targeted to rise from 2.9% to 6%

Saudi women now rank #2 among 53 global markets for weekly cinema visits — one of the clearest consumer-behavior signals of how quickly entertainment access has expanded.

Sources: BBC; Vision 2030 official documentation; GWI Core research. Presented as consumer lifestyle trends only.

Entertainment has gone from near-zero to a real industry

89M	4.2%	$27M+	$1.1B
Visitors to entertainment events & venues (2025)	Vision 2030 target for entertainment's direct GDP contribution	Domestic cinema box-office revenue, early 2025 alone	Saudi Ignite Program investment to grow the digital content market

Entertainment was described in the Vision 2030 launch documents as a near-zero base in 2016. A decade later, it's a measurable, targeted, investable sector in its own right.

Sources: General Entertainment Authority (via Vision2030.ai); The National News; Vision 2030 official documentation.

Household entertainment spend is on a defined growth path

2016

2.9%

of household spending on entertainment

2030 Target

6.0%

of household spending on entertainment — more than double

This is a government-set, Vision 2030-tracked target, not an industry projection — which makes it one of the more reliable directional signals in this entire report.

Source: Saudi Vision 2030 official targets, as reported by BBC and Vision2030.ai.

Women are one of the fastest-growing consumer segments

#2

Global rank among 53 markets for women's weekly cinema attendance

2x

Growth in female labor force participation since 2017 (17% → 35%)

New

Access to driving, live events, and mixed-gender venues — all within the past decade

Presented here purely as consumer-behavior and market-sizing signals: a demographic with rapidly growing independent income, mobility, and entertainment access represents one of the clearest emerging segments for brands operating in the Kingdom.

Sources: GWI Core research (Women in Saudi Arabia); Vision2030.ai labor force tracker. Presented as consumer-behavior signals only.

What this means for brands

Entertainment and lifestyle categories are still in their growth phase, not their mature phase. Brands positioning early are competing for share of an expanding market, not defending share of a shrinking one.

SECTION 04

Entertainment

How Saudis discover, watch, and engage

Streaming has become the default, not the alternative

89%

Use at least one streaming platform — Shahid has led for 3 straight years

99%

Use social media — WhatsApp, Snapchat, and YouTube rank highest

88%

Population-level TikTok penetration — among the highest of any country measured

Cinema, once entirely absent from this landscape in 2016, is now a growing category in its own right — while print media continues a steady multi-year decline.

Sources: Saudi Center for Opinion Polling (SCOP) 2025; Arabian Business/Admitad-Stllr Network creator economy report; Statista print media trend via Meltwater.

A new category has entered the media conversation: AI

49%

of Saudis use AI tools

31% of AI users engage daily — a habit-forming behavior most brands haven't yet built content strategy around.

WhatsApp	Near-universal — the default messaging & business channel
Snapchat	91.8% of the eligible (13+) audience — a Gulf stronghold platform
YouTube	~79% of the population — long-form and tutorial content leader
Instagram	~52% of the population, growing fastest among the 25-34 age group

Sources: Saudi Center for Opinion Polling (SCOP) 2025; DataReportal Digital 2026: Saudi Arabia.

TikTok has moved from entertainment app to commerce channel

88%

Population-level penetration — the platform's fastest-growing driver of influencer orders

2025

Year TikTok Shop launched in Saudi Arabia, enabling direct in-app checkout

61%

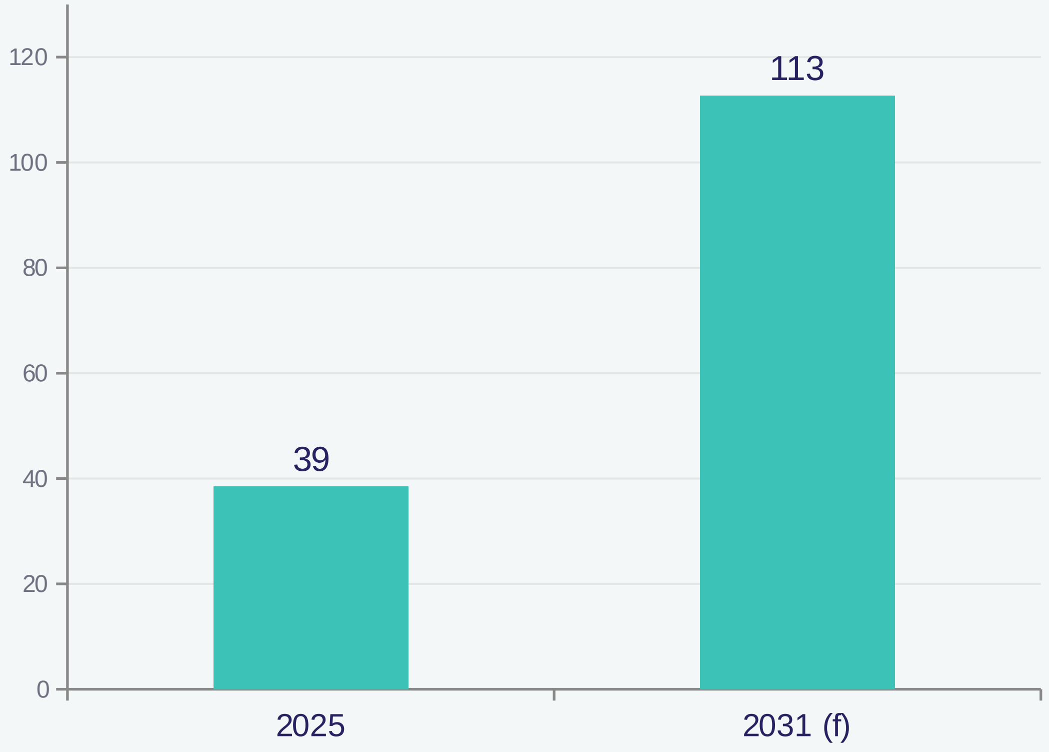
Of consumers in KSA & UAE shop through Instagram or TikTok

This isn't a future trend to plan for — it's a current behavior. Product discovery, comparison, and purchase increasingly happen inside the same short-video feed, without the consumer ever leaving the app.

Sources: GCC Influencer Marketing Market Report (P&S Market Research); videngrowth.com Ramadan Advertising Guide 2026 (YouGov data).

The creator economy is scaling faster than most traditional media budgets

Saudi creator economy market size, US$ billions



The shape of the market

19.7% CAGR through 2031

+32.4% growth in Q1 2025 alone

63% of creators are male, 37% female — a gender gap brands can use content strategy to close

Saudi Arabia holds a 40% share of the entire GCC influencer marketing market

Sources: Mobility Foresights Creator Economy Market Report; Arabian Business (Admitad/Stllr Network); P&S Market Research GCC Influencer Marketing Report.

Ramadan remains the single biggest content and commerce event

$4.6B	13.3M	56/44	+45%
Consumer spending in the week before Ramadan 2025 — a 34.7% spike	Unduplicated TV viewers tuned in during Ramadan 2025	Split between satellite TV and streaming viewing time — digital's role keeps growing	Increase in retail search interest in KSA during the season

Ramadan is not a generic seasonal bump — it is a distinct planning season with its own content genres, viewing patterns, and purchase-intent timeline that starts well before the month begins and extends through Eid.

Sources: Tamara Ramadan 2026 Playbook (Saudi Central Bank data); AppsFlyer Ramadan 2026 Gulf Strategy; DICM Ramadan 2025 Content Report.

What this means for brands

Content strategy and commerce strategy have merged. Brands still planning these as separate workstreams — separate teams, separate calendars — are structurally behind the platforms their customers are already using.

SECTION 05

Opportunity

How KSA compares regionally — and what's next

KSA sits at the center of a highly uneven region

Active social media penetration, % of total population (2026)

Beyond the chart

Bahrain & Oman (Lower Gulf): consistently Gulf-tier connectivity, though directly comparable social-penetration figures aren't publicly published alongside the markets above.

Levant (Jordan, Lebanon, Iraq): far more varied — Jordan's economy grows modestly (~2.9% GDP, 2026f), Lebanon remains in economic contraction, and Iraq's digital penetration trails the region.

Morocco (North Africa): internet penetration reaches 92%, among the strongest in North Africa.

Source: DataReportal / We Are Social, Digital 2026. Bahrain, Oman, Jordan, Lebanon, Iraq, and Morocco figures not shown — comparable methodology not consistently published at time of writing.

KSA doesn't just lead in connectivity — it leads in creator commerce too

40%

Saudi Arabia's share of the entire GCC influencer marketing market (2025)

263K

Influencers active across the GCC (2025), up from 150K in 2023 — a 75% jump

$1.1B

Government investment (Saudi Ignite) specifically to grow this sector further

The connectivity advantage from the previous chart converts directly into commercial leadership: KSA is not just the largest audience in the region, it's the largest creator-commerce market too.

Sources: P&S Market Research GCC Influencer Marketing Report; Qoruz creator economy data (via EIN Presswire).

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OPPORTUNITY

What this means for brands entering or growing in KSA

- **Digital-first isn't optional**
  With ~100% internet penetration and a young population, a digital-only launch strategy is viable in KSA in a way it isn't yet across most of the Levant or North Africa.

- **Entertainment is a growth category, not a mature one**
  Cinema, live events, and streaming are still expanding fast — brands positioning early are competing for share of a growing pie, not a shrinking one.

- **Content and commerce are the same team now**
  TikTok Shop and social-commerce adoption mean creator partnerships should sit inside the same budget line as performance marketing, not a separate one.

- **Ramadan needs its own plan, not a seasonal tweak**
  With spend and search spiking weeks before the month even begins, a Ramadan strategy built in February is already late.

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OPPORTUNITY

Risks & caveats worth planning around

- **Regional volatility affects short-term behavior**
  Wider Middle East security dynamics can periodically affect tourism arrivals, travel planning, and the cost of capital for market entry — a factor to monitor, not a reason to delay.

- **Some figures are projections, not outcomes**
  GDP growth, market-size, and 2030 targets cited throughout this report are forecasts or official targets; actual outcomes may vary, and this report labels each accordingly.

- **Public data has real gaps**
  As flagged in the regional benchmark, several neighboring markets don't publish figures on the same methodology or timeline — comparisons there are necessarily partial.

HADI JAWAD KADHEM

Founder, Lumina Plus

hadi@luminaplus.me

www.luminplus.me

ABOUT THE AUTHOR

Decades of insight, built into every page

I bring decades of executive experience in media, marketing, and multi-brand growth strategy across the region.

Equipped with more than 25 years of professional experience across market research, strategic planning, and business development, I help organizations make confident decisions — grounded in evidence, not guesswork.

My career has spanned leadership roles at some of the region's most established research, media, and marketing organizations, working across the GCC and wider MENA region before founding Lumina Plus to bring that same rigor directly to clients, without the layers of a traditional agency.

Let's talk about your market.

This is edition one.

The same lens — Economy, Society, Culture, Entertainment, Opportunity — applies to every market in the region.

Want the same briefing for UAE, Egypt, or another market — or a custom, brand-specific version of this analysis?

Hadi Jawad Kadhem

hadi@luminaplus.me

www.luminplus.me