THE KINGDOM'S MOMENT

Saudi Arabia's $64 Billion Investment in Brand, Celebrity & Cultural Influence

A 2026 Research Study

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Table of Contents

I. Executive Summary

Saudi Arabia is in the middle of the largest coordinated national brand transformation in modern history. It is buying, building, and broadcasting a new identity at a scale that dwarfs any comparable campaign by any country since the post-war rebuilds of the mid-20th century. The fuel is Vision 2030, the vehicle is the Public Investment Fund, and the medium is every major commercial surface in global culture — sport, entertainment, music, tourism, media, fashion, creator content, and hospitality.

Headline numbers

- Total Saudi advertising market: $2.54 billion in 2025, heading to $3.39 billion by 2029 at 7.48% CAGR (Statista).
- Digital ad spend: $4.01 billion (2025), $4.68 billion (2026), $7.98 billion (2029), growing at 19.4% CAGR (Research and Markets via GlobeNewswire).
- Marketing and advertising agency services market: $3.03 billion in 2025, $4.14 billion by 2031 (Mordor Intelligence).
- $64 billion committed by the Saudi government to entertainment and related infrastructure through 2028 (General Entertainment Authority via trade.gov).
- Tourism: 122 million visitors in 2025 with $81 billion in total tourism spending, en route to a revised target of 150 million visitors by 2030 (Saudi Ministry of Tourism via Arab News).
- Public Investment Fund AUM of approximately $941 billion, funding 346 sports sponsorships and roughly 910 Saudi-linked sponsorships tracked globally (Play the Game / Wikipedia).
- More than $3 billion in foreign-player signings across the Saudi Pro League since 2023 (Arthnova analysis).
- Saudi creator and influencer advertising market projected at $95.69 million in 2025, with the channel growing at 6.72% CAGR — the fastest in the country's agency sector (Soogk / Mordor Intelligence).
- Inbound tourist spending hit $40.95 billion (SR 153.6B) in 2024, up 13.82% year-over-year (Saudi Central Bank via Arab News).
- Non-religious travel reached 59% of inbound visits in 2024, up from 44% in 2019; average international stay is 19 nights with SR 5,669 spent per trip (Ministry of Tourism via Arab News).
- Saudi Arabia ranked #1 worldwide in international tourism revenue growth in Q1 2025, with international arrivals 102% above pre-pandemic levels (UNWTO via Gulf News).
- Domestic hospitality market: $27.1B in 2025, projected to reach $54.3B by 2030 at 7.4% CAGR; 61% of rooms classified as luxury, upscale, or upper upscale (Oxford Business Group).
- 560 million inbound overnight stays recorded in 2024, up 29.6% year-over-year (DataSaudi).
- Creator economy grew 32.37% in Q1 2025; TikTok reaches ~88% of the Saudi population (Admitad & Stllr Network via Fast Company Middle East).

Strategic takeaways

First, the Kingdom is moving from a phase of visibility-buying into a phase of conversion. Early Vision 2030 spending was about getting on the map. Current spending is increasingly accountable, performance-driven, and focused on measurable uplift in inbound tourism, commerce, and inward investment. Western partners who lead with measurement and ROI will win share against partners who lead with flash.

Second, sports remain the flagship but are no longer the whole story. Entertainment, music, film, creator content, hospitality, and cultural IP are scaling fast. Riyadh Season now rivals the world's largest festivals. Red Sea International Film Festival is attracting global filmmakers. A regulated creator economy is producing the most trusted influencer category in the Gulf.

Third, the commissioning side is consolidating. A small number of power centers — the PIF, the General Entertainment Authority, the Ministry of Culture, the Saudi Tourism Authority, the Royal Commissions for AlUla and Riyadh, and the giga-project entities (NEOM, Qiddiya, Red Sea Global, Diriyah, New Murabba) — control the majority of budget decisions. Partners who map these relationships early will move faster than those who try to enter through agency chains.

Fourth, the 2034 FIFA World Cup and Expo 2030 Riyadh are forcing functions. Every major global brand will need a Saudi position by 2030. Talent rosters, sponsorship inventory, and creator partnerships will be locked up in waves between now and 2028. Waiting is a losing strategy.

What this report contains

Section II sizes the macro opportunity — demographics, capital base, political timeline. Section III details the Saudi marketing and advertising economy at the channel and category level, with hard sizing for every format from search to cinema. Section IV maps the giga-projects as standalone commissioning opportunities, with specific budget and programming detail. Section V documents the Kingdom's sports portfolio — the most expensive and most visible element of the national brand campaign — with named property economics. Section VI covers entertainment, tourism, and cultural programming, including the Riyadh Season and Saudi Tourism Authority machinery. Section VII details celebrity and talent deal economics, structures, and commissioning pathways. Section VIII covers the creator and influencer layer, the fastest-growing channel in the market. Sections IX and X translate the data into category deep-dives and a partner playbook. Section XI identifies ten specific opportunities for 2026 to 2030. Section XII gives a five-year forecast. Section XIII covers narrative, press and global coverage. Sections XIV and XV document methodology, sources, and publisher. Every statistical claim in this report links to a named, external reference — no proprietary-only numbers, no unverifiable projections.

This study is intended to be used. It is built for CMOs, founders, board members, talent representatives, creator-economy operators, hospitality executives, entertainment programmers, and agency principals making Saudi Arabia decisions between now and 2030. It is not a cheerleader's brief, and it is not an analyst's abstract. It is a working document for the teams that will build the next generation of Saudi brand partnerships.

II. The Macro Opportunity: Why Saudi, Why Now

To understand Saudi Arabia's marketing economy, start with three structural realities that set the ceiling and the floor of the opportunity: demographic, financial, and political.

Demographics that favor digital, social, and creator content

Saudi Arabia is a young, mobile-first nation. Internet penetration reached 99 percent by early 2025, and the population includes roughly 35.1 million social media user identities as of January 2024. About 75 percent of the population is under the age of 35. Average daily social-media usage in the region is the highest in the world at roughly 3.5 hours per user. Digital advertising accounts for roughly 68 percent of total ad spend in Saudi Arabia and the UAE as of 2023, a share that continues to climb. Sources: WiFi Talents, Market Data Forecast.

This demographic profile has consequences. It means TV and print, while not dead, are losing share annually. It means short-form video — TikTok, Snapchat, Instagram Reels, YouTube Shorts — is where mass attention lives. It means commerce is native to the phone. It means branded content, creator partnerships, and platform-native paid media are the dominant formats for reaching Saudi consumers under 40.

A sovereign wealth fund with near-unlimited firepower

The Public Investment Fund sits at roughly $941 billion in assets, ranking among the largest sovereign wealth funds in the world. More than 60 percent of its activity is domestic. The fund is chaired by Crown Prince Mohammed bin Salman and governed by Yasir Al-Rumayyan, who also chairs Aramco and Newcastle United, effectively runs LIV Golf, chairs Riyadh Air, and sits on the board of the Saudi Olympic & Paralympic Committee — reportedly holding more than 20 key decision-making roles across the Saudi strategic economy. Source: Wikipedia / Play the Game.

The practical implication for Western partners: capital is not the constraint. Strategy, access, and execution are. A brand or talent pitch that solves a real Vision 2030 objective — job creation, tourism pull, cultural exports, inbound investment, youth employment — has a realistic path to financing in eight or nine figures. Pitches that read as pure image plays, without a delivery mechanism, now get harder questions than they did in 2021 or 2022.

To put the PIF's scale in context: the fund grew from fewer than 50 staff in 2015 to nearly 500 by 2018, and its portfolio includes positions across technology (co-founder of SoftBank's $45B Vision Fund via a $45B commitment), entertainment (Savvy Games Group, Al-Hilal, Newcastle United), aviation (Riyadh Air), mining (Ma'aden), and dozens of other strategic assets. The fund's investment activity spans both domestic giga-projects and high-profile foreign assets, and it coordinates with Aramco (which itself generates hundreds of millions in annual sponsorship spending) on joint sport, cultural, and entertainment initiatives. Source: Wikipedia.

Forcing functions: World Cup 2034 and Expo 2030

Saudi Arabia has secured hosting rights to the 2034 FIFA World Cup and will host Expo 2030 in Riyadh. Both events require an infrastructure, hospitality, and cultural delivery schedule that drives spending and partnership activity every quarter between now and 2034. Saudi Pro League and LIV Golf spending is explicitly framed against this runway. Source: Arthnova.

These two events are the single most important planning anchors in the Saudi marketing calendar. Every brand, talent, and agency decision should be calibrated against where those windows sit. Sponsorship, broadcast, hospitality, and ambassador inventory will be locked up in waves: giga-project openings through 2027, World Cup qualifying and draw coverage in 2028–2033, Expo 2030 activation in 2029–2030, and the World Cup itself in 2034.

Regional market position

Saudi Arabia now holds roughly 34.3 percent of the total Middle East advertising market, making it the dominant market in the region and ahead of the UAE at 28.3 percent. Middle East digital ad outlays quadrupled between 2022 and 2024, with Saudi Arabia contributing more than half of the incremental spending. Source: Market Data Forecast; Mordor Intelligence.

For Western agencies still headquartering their regional operations in Dubai, this is the forcing case to open or expand in Riyadh. Client budgets are migrating east of the Red Sea. Riyadh has passed Dubai as the single most important city-level market in the MENA advertising economy.

The economic base under the marketing machine

Saudi Arabia's marketing economy is backed by one of the strongest macroeconomic foundations in the region. Vision 2030 has pushed through a sustained program of economic reform: women's labor force participation has roughly tripled since 2016, non-oil GDP has expanded as a share of the economy, foreign direct investment regulations have been relaxed, special economic zones have been established, and 100 percent foreign ownership has been permitted in key sectors.

Private-sector funding in the tourism industry alone rose to SR 14.2 billion in 2024, up from SR 12 billion the previous year. Approximately 40 percent of that capital came from foreign investors, a signal of rising global confidence in the Kingdom's investment proposition. Source: Arab News.

Recent headline US technology commitments illustrate the momentum. Groq has secured a $1.5 billion commitment from Saudi Arabia to expand AI chip deliveries. Salesforce has committed $500 million for AI development, including training up to 30,000 Saudis in AI skills. ServiceNow is launching Saudi data centers in 2026. Accenture is partnering with Google Cloud on sovereign cloud and generative AI in the Kingdom. PepsiCo is opening a new regional headquarters in Riyadh. IBM has partnered with Riyadh Air on enterprise AI. Source: US-Saudi Business Council.

Additional 2025 deal flow includes: PIF-subsidiary Savvy Games Group in discussions to acquire Pokémon Go developer Niantic's gaming business for $3.5 billion; Johnson Controls Arabia exporting Saudi-made HVAC products to US public schools; Sipchem and LyondellBasell developing a joint feedstock cracker complex; and Globant partnering with Red Sea Global on sustainable luxury tourism technology. Source: USSBC.

The communications infrastructure

The commercial communications infrastructure in Saudi Arabia has matured rapidly. National ICT turnover reached approximately $40.94 billion in 2023. The Saudi Data and AI Authority links 66 of the Vision 2030 goals to AI implementation. The General Commission for Audiovisual Media has moved from being a regulator to being a commercial enabler, licensing thousands of creators and agencies and underwriting the legitimacy of the paid-content ecosystem. Saudi Media City in Riyadh and the Riyadh Creative District are the physical anchors of that build-out.

For Western partners, the practical takeaway is that the media and production ecosystem needed to execute sophisticated campaigns at scale now exists inside the Kingdom. It is no longer necessary to fly everything in from London, Dubai, or New York. The 2026 market is a market in which integrated production, media planning, talent casting, and post-production can increasingly happen in Riyadh.

III. The Saudi Marketing & Advertising Economy

This section sizes the market in detail: total spend, channel mix, category leaders, agency landscape, and the key behavioral drivers that shape how budget moves across channels and calendar.

Total market sizing

Saudi Arabia's total advertising market was forecast at approximately $2.54 billion in 2025, growing at a projected 7.48 percent CAGR to $3.39 billion by 2029. Digital ad spending alone reached $4.01 billion in 2025 and is projected to hit $4.68 billion in 2026, on its way to $7.98 billion by 2029, expanding at 19.4 percent CAGR from 2026. Sources: Statista; Research and Markets via GlobeNewswire.

The difference between the two figures — and they come from different methodologies — is instructive. Statista's more conservative sizing excludes agency commissions, rebates, production costs, and taxes. The Research and Markets digital-only number includes a broader definition of digital spend and ecosystem transactions. The honest takeaway: depending on how you count, the Saudi advertising economy in 2026 is somewhere between $3 billion and $5 billion, and every credible methodology agrees on the direction: up and to the right.

Agency services market

The Saudi marketing and advertising agency services market is valued at $3.03 billion in 2025, rising to $3.19 billion in 2026 and $4.14 billion by 2031 at a 5.34 percent CAGR. Large enterprises accounted for 66.1 percent of 2025 billings. SMEs are expected to inject approximately $1 billion in new annual media spend cumulatively between 2026 and 2031. Source: Mordor Intelligence.

The agency landscape is fragmented but consolidating. International holding networks — WPP, Omnicom, Publicis, IPG, Dentsu, Havas — maintain full-service mandates with large enterprise and state-linked clients. Accenture Song has built a strong position on the transformation side. Specialist shops are scaling on influencer, gaming, and Arabic content. Local players such as Creative Waves, Advertising Ways, and WOW Marketing compete on cultural fluency and government relationships.

Channel mix

Digital advertising secured approximately 61.85 percent of Saudi Arabia's marketing and advertising agency market in 2025, on the back of 99 percent internet penetration and mandatory e-government communications. Digital is projected to account for roughly 90 percent of total ad spend by 2029, with 80 percent of revenue generated through programmatic. Source: Statista.

Despite the digital dominance, out-of-home held a 36.85 percent share of the agency market in 2025, largely because mega-projects such as NEOM, Qiddiya, and New Murabba generate premium digital billboard inventory with sensor-based audience analytics. Search advertising is the single largest digital category at roughly $1.03 billion in 2025. Mobile advertising is forecast at $1.2 billion by 2025. Gaming is now the country's single largest media category at approximately $2.29 billion. Cinema advertising is expected to double by 2026 on the back of new theater openings. Sources: Mordor Intelligence; Soogk; WiFi Talents.

Category spending patterns

Consumer goods generated 31.35 percent of agency market revenue in 2025, anchoring the sector. Healthcare advertising is projected to accelerate at a 6.83 percent CAGR through 2031. FMCG remains the largest spender on television advertising. Real estate advertising jumped 15 percent following the launch of major giga-projects. Source: Mordor Intelligence; WiFi Talents.

The Ramadan effect

Saudi consumers spend approximately 25 percent more during Ramadan than any other month of the year. Advertising spend follows the consumer. Ramadan commands premium rates for television sponsorship of mosalsalat dramas, influencer content tied to iftar and suhoor, and experiential activations linked to nightly gathering culture. Social ad spend is growing at roughly 10.4 percent annually between 2023 and 2027. Source: WiFi Talents.

What the 2026 market looks like on the ground

Industry practitioners describe 2026 as a year of discipline rather than exuberance. Ministries and state-linked institutions are increasingly tying budgets to transformation KPIs and citizen outcomes. Private firms are demanding stronger business cases. The most recent read from Campaign Middle East and regional consultancies describes the agency market as growing in the low-to-mid single digits, well below the boom rates of the early Vision 2030 years. Source: Campaign Middle East.

The implication: Western partners who bring measurement sophistication, vertical expertise, data and analytics depth, and Arabic creative capability will compete on the criteria the market now rewards. Broad, undifferentiated creative services at global rate cards will struggle.

Top advertisers and brand-awareness leaders

The most active advertisers in Saudi Arabia by measured ad-awareness uplift in early 2026 include Snickers, Almarai (the dominant regional dairy brand), and Al Mamlaka (Kingdom Tower). These three brands posted the largest percentage-point gains in YouGov BrandIndex's Ad Awareness measure in January 2026, all rising more than 8 percentage points in a single month. Source: YouGov.

The pattern tells Western brand marketers something important: the top of the Saudi ad-awareness league table rewards sustained, culturally-embedded, category-appropriate campaigns. It is not a market that rewards single splashy launches at the expense of year-round presence. The most-rewarded brands are the ones that show up in Ramadan, summer, National Day, and Founding Day consistently, across multiple channels, in Arabic and English, with local relevance.

How Saudi consumers discover brands

Brand discovery in Saudi Arabia has moved decisively toward social and search. TikTok, Snapchat, YouTube, and Instagram are the dominant channels for brand discovery among under-35 consumers. Short-form video is the dominant content format. Creators are the most trusted intermediaries. Localization — Arabic-first, dialect-aware, culturally embedded — consistently outperforms generic global creative, even when the underlying brand proposition is identical.

For Western brands, this has specific operational consequences. Creative should be designed for Arabic-first rendering from the outset, not adapted after the fact. Media plans should over-index on short-form video and creator content versus traditional display and pre-roll. Campaign timing should map to local calendar peaks (Ramadan, summer, National Day, Founding Day) with significantly higher spend weightings than the annualized baseline would suggest. Talent and creator casting should lean heavily toward Saudi and pan-Arab figures who have earned authentic local followings.

Production costs and media rates

Rate cards in Saudi Arabia have risen materially over the past three years as demand has outpaced supply for top-tier production, creative, and strategic talent. Talent inflation is a recurring theme in industry commentary. Premium video production in Riyadh now commands rates comparable to London or New York for equivalent output. Influencer and creator rates, particularly for Arabic creators with engaged Saudi audiences, have risen sharply as brand demand for regulated, authentic voices has accelerated.

The practical implication for budgeting: Western partners should not assume they can deliver Saudi campaigns at Dubai cost bases or at Western emerging-market cost bases. Realistic budget frameworks for 2026 should assume premium production and media rates, particularly during Ramadan and Riyadh Season, offset by very favorable reach economics given the Kingdom's digital infrastructure and high per-capita spending.

IV. Giga-Projects as Brand Platforms

Saudi Arabia's giga-projects are the most concentrated real estate and tourism development program in the world. They are also the most concentrated branded-environment opportunity. Each giga-project is a standalone commissioning entity with its own marketing budget, creative agenda, hospitality footprint, and talent roster. For Western brands, partners, and talent, they are both destinations and distribution channels.

NEOM

NEOM has allocated more than $500 million to marketing since 2021, including the branding and positioning of THE LINE, Oxagon, Trojena, and Sindalah. NEOM operates as the flagship Saudi mega-brand globally, with campaigns placed across major international titles, sports-adjacent broadcast inventory, and targeted luxury-media buys. Source: Bloomberg via Market Data Forecast.

NEOM is also a talent and IP platform in its own right. It has backed a film studio, hosted international creator trips, and built out partnerships with fashion, architecture, and design talent. Its commissioning window for brand partnerships, creator content, and ambassador work is one of the most active in the Kingdom.

Qiddiya

Qiddiya is planned as the world's largest entertainment city, at roughly three times the footprint of Walt Disney World, with more than 300 leisure and entertainment facilities, a 20,000-seat cliff-top stadium, Formula 1–grade motorsport facilities, the world's largest Six Flags theme park, a waterpark, golf courses, cinemas, and a performing arts theatre. It targets more than 14 million annual visitors. Source: International Trade Administration (trade.gov).

For family-entertainment brands, theme-park IP, live entertainment, and children's content, Qiddiya is the single most important commissioning opportunity in the region. It will require roster-scale IP licensing deals through the late 2020s.

Red Sea Global

Red Sea Global is building ultra-luxury coastal hospitality across a chain of islands, with the Sheybarah and Ummahat properties opening to the public for the first time in 2025. The brand has signed technology and experience design partnerships with global firms including Globant to build integrated digital visitor experiences.

Source: Arabian Business; USSBC.

Diriyah and AlUla

Diriyah is being developed as the cultural and heritage heart of the Kingdom, showcasing more than 300 years of Saudi history, anchored by the At-Turaif UNESCO site and Bujairi Terrace. AlUla, home to the Hegra UNESCO site, is being positioned as a luxury cultural and eco-tourism destination. AlUla's 'Forever Revitalising' campaign, launched in 2024, drove 37 percent growth in tourist numbers and 56.3 percent growth in regional room occupancy in its first year. Source: Oxford Business Group.

New Murabba, Jeddah Central, King Salman Park

New Murabba is Riyadh's next major urban destination, anchored by the Mukaab. Jeddah Central will include an oceanarium, opera house, sports stadium, more than 17,000 residential units, and 2,700 hotel rooms. King Salman Park, designed to be the largest urban park in the world at four times the size of Central Park, recently secured more than $3.8 billion in private-sector commitments at MIPIM 2026. Sources: trade.gov; Arab News.

Hospitality pipeline

The PIF has a hotel pipeline of approximately 136,000 rooms scheduled to go live by 2030. Global luxury operators — Four Seasons, Ritz-Carlton, Mandarin Oriental, Aman, EDITION, Rosewood, and others — are executing properties across the Red Sea, AlUla, Diriyah, Riyadh, and Jeddah. Source: Public Investment Fund.

The hospitality build-out is the single most important infrastructure variable for the tourism-brand partnership market. Without rooms, there is no inbound scale. With rooms, every F&B partnership, wellness brand, retail activation, and experiential program compounds. Hospitality partnerships are the fastest-maturing category for Western luxury and lifestyle brands in Saudi Arabia right now.

Aviation and connectivity

Saudi Arabia has added 14 new international routes in 2024 and is now connected to 175 destinations, on a trajectory toward its 2030 target of 250. Riyadh Air, the PIF-owned full-service carrier, launched commercial operations in October 2025 with its inaugural flight from Riyadh to London Heathrow, followed by Dubai. Riyadh Air has already signed shirt-sponsor and naming-rights deals with Atlético Madrid's Metropolitano Stadium and an airline sponsorship with CONCACAF, and has partnered with Uber, Amadeus, and IBM. Three additional giga-project-focused airlines are planned. Sources: Business Traveller; Riyadh Air; Arab News.

Airlines are the connective tissue of the Saudi tourism brand play. Every destination that lands on the Riyadh Air network or the Saudia expansion map gets pulled closer to the core. The expansion has also opened a set of sponsorship, content, and loyalty-program partnership opportunities that will persist for a decade.

Giga-project opening timeline

The rolling opening schedule for Saudi Arabia's major projects through 2034 creates a sustained marketing and partnership calendar. Each opening is a standalone brand moment with associated press, talent activation, hospitality inventory, and commercial partnership opportunities.

- 2025: Red Sea Global initial openings including Sheybarah and Ummahat ultra-luxury islands.
- 2025–26: Riyadh Air launch, expansion, loyalty program activation, and route rollout.
- 2026–27: Additional giga-project airline launches for NEOM and Qiddiya.
- 2027: Qiddiya first-phase openings including early entertainment venues and motorsport facilities.
- 2027–29: Continued NEOM phased openings across Trojena, Sindalah, Oxagon, and THE LINE precincts.

- 2028: King Salman International Airport next phase comes online.
- 2029: Jeddah Central core openings including hospitality and stadium inventory.
- 2030: Expo 2030 Riyadh. 150M annual visitor target reached.
- 2034: FIFA World Cup hosting — peak concentration of global media, sponsorship, and talent partnership activity.

Commercial partnership structure inside giga-projects

Each giga-project has a distinct commissioning architecture. NEOM operates with its own marketing, content, and partnerships organization that can commission directly with global agencies and talent. Qiddiya, under the Qiddiya Investment Company, is structured to license global entertainment IP and operate major attractions with international partners. Red Sea Global has built operational partnerships with luxury hospitality operators and technology firms. AlUla operates through the Royal Commission for AlUla (RCU) with its own distinct brand-partnership and destination-marketing approach. Diriyah Gate Development Authority runs Diriyah's brand, partnerships, and cultural programming.

For Western partners, the practical consequence is that giga-project deals are not commissioned through a single Saudi procurement channel. Each giga-project has its own gatekeepers, its own budget cycles, and its own creative priorities. Effective market entry means engaging multiple counterparties in parallel, not trying to route everything through a single Saudi holding-company relationship.

V. Sports as Brand Builder

Sports is the single most visible line item in the Saudi Arabia brand campaign, and the most scrutinized. It is also the most effective. Few marketing tools exist that can move a country's global conversation as fast or as far as a stadium full of Ronaldo, a Heavyweight boxing main event, a Formula 1 weekend, or a World Cup hosting announcement. Saudi Arabia has spent accordingly.

The PIF sports footprint

The Public Investment Fund and its subsidiaries have secured at least 346 sponsorships across global sports. Total Saudi-linked sponsorships tracked across global sport stand at approximately 910, with Aramco contributing another 71 independently. Source: Play the Game; Sporting Intelligence.

Football: Saudi Pro League and Newcastle United

The PIF took 75 percent ownership of the four founding clubs of the Saudi Pro League — Al-Nassr, Al-Hilal, Al-Ittihad, and Al-Ahli — in 2023. Saudi Pro League clubs spent $957 million in the summer 2023 window alone, second only to the Premier League. Total foreign player investment from 2023 through 2025 exceeds $3 billion. Cristiano Ronaldo earns $213 million per year at Al-Nassr on a contract that runs through 2027. Al-Nassr signed 21-year-old Jhon Duran for $77 million in 2025. Source: Arthnova.

Named talent in the Saudi Pro League has included Ronaldo, Sadio Mane, Aymeric Laporte, Riyad Mahrez, Roberto Firmino, Ivan Toney, N'Golo Kante, Karim Benzema, Moussa Diaby, Ruben Neves, Neymar, and João Cancelo. Neymar's economics were the starkest: an approximately $90 million transfer fee plus a $100 million annual salary, against 7 matches played over 18 months before his contract was terminated in January 2025 — roughly $42.8 million per match.

Newcastle United has cost the PIF approximately £500 million in total, including a £305 million purchase price, legal fees, player investment, and flow-through sponsorship spending across Sela, Noon, Saudia, and STC. The club has emerged as a flagship soft-power platform in the English Premier League. Source: Sporting Intelligence.

In November 2025, the PIF announced a new five-year investment strategy reprioritizing its portfolio and, in a notable pivot, agreed to sell 70 percent of Al-Hilal to Kingdom Holding Company. The move signals a shift from trophy-collecting toward ROI-oriented sports investment. Source: Front Office Sports.

LIV Golf

LIV Golf has committed approximately £2.5 billion to date, including more than £1 billion in player contracts and roughly £750 million in prize funds, with hundreds of millions more in event staging, promotion, and media. The PIF is reportedly reviewing its backing of LIV in the context of its new investment strategy. Source: Sporting Intelligence; Front Office Sports.

Formula 1 and motorsport

Saudi Arabia has spent an estimated £1 billion in Formula 1, via Aramco and other entities, including the title partnership of the Aramco Saudi Arabian Grand Prix at the Jeddah Corniche Circuit. Formula E launched its Saudi event in 2020, and Qiddiya's motorsport facilities will extend the motorsport footprint into the late 2020s. Source: Sporting Intelligence.

Combat sports, WWE, and boxing

Saudi Arabia hosts the largest concentration of heavyweight boxing in the world, with title fights and pay-per-view cards anchoring Riyadh Season. DAZN signed an exclusive broadcast agreement with the General Entertainment Authority in October 2024 covering all Riyadh Season events, including international distribution rights to its boxing cards outside MENA. WWE has operated under a reported $100 million per year, ten-year hosting contract with the Saudi sports ministry since 2018. UFC, PFL, and Power Slap have all staged events in the Kingdom. Source: Council on Foreign Relations; Riyadh Season.

Tennis

The PIF has entered strategic partnerships with both the ATP and WTA Tours. Rafael Nadal was signed as an ambassador to the Saudi Tennis Federation. The 2024 WTA Finals were hosted in Riyadh with PIF and Riyadh Air as title sponsors. The Six Kings Slam exhibition was staged at Riyadh Season in October 2024. In March 2024, the PIF publicly proposed a $2 billion combined offer to acquire both the ATP and WTA Tours, though the status of that offer remains unclear. Source: Play the Game; Wikipedia.

FIFA, 2034 World Cup, and Aramco

Saudi Arabia has secured hosting rights to the 2034 FIFA World Cup. Aramco signed a four-year, $600 million partnership with FIFA (2024 through 2027) as a 'major worldwide partner,' one of the largest corporate sponsorships in world football. The PIF has also formed a partnership with CONCACAF covering the 2025 Gold Cup and both men's and women's Concacaf Champions Cups. Source: Sporting Intelligence; Play the Game.

Esports and gaming

Saudi Arabia has positioned itself as a global hub for competitive gaming. The Esports World Cup in Riyadh draws roughly 2,000 professional players and 200 clubs from more than 100 countries. Savvy Games Group, a PIF subsidiary, is in talks to acquire the video-game business of Niantic, the developer of Pokémon Go, for approximately $3.5 billion. Source: Connecting Travel; USSBC.

Implications for Western brands and talent

The Saudi sports ecosystem is the most active sponsorship-commissioning market in the world. For any Western brand in categories that live alongside sport — apparel, consumer electronics, beverages, financial services, watches, automotive, telecom — the roster of sponsorable properties, teams, events, and individual athletes is deep. For talent representatives, the deal flow is consistent and scaling. The shift toward ROI-oriented portfolio management in 2026 means partners who bring measurement, audience insight, and commercial integration will be weighted more heavily than partners offering straight visibility. The transition is an opportunity for US agencies with performance and measurement heritage.

Cricket, athletics, and emerging sport categories

Saudi Arabia has invested in cricket via the International Cricket Council and in athletics, volleyball, handball, and equestrian sports. Horse racing has been anchored by the Saudi Cup, currently the richest race in world horse racing. The Kingdom has also moved into wrestling, golf academies, youth sports academies, and a growing schedule of international tournaments hosted inside Riyadh Season. Source: Sporting Intelligence.

Commercial structure of Saudi sports deals

Saudi sports deals typically fall into one of five structural templates:

- Title or presenting sponsorship. Property-level sponsorship (Aramco Saudi Arabian Grand Prix, PIF Saudi International, Aramco Team Series). Typically multi-year, high-value, with extensive commercial rights.
- League or federation partnership. Framework partnerships with international bodies (FIFA, Concacaf, ATP, WTA). Multi-year, cross-property, typically with escalating rights.
- Team ownership. Direct ownership of clubs (Newcastle United) or majority stakes in domestic clubs (Saudi Pro League four founding clubs).
- Event hosting. Multi-year hosting contracts (WWE, LIV Golf events, Six Kings Slam). Often bundled with sponsorship and media rights.
- Talent contracts. Individual athlete contracts at Saudi clubs, federation ambassadorships (Nadal for the Saudi Tennis Federation), and exhibition appearances.

For Western agencies advising clients in sports-adjacent categories — apparel, wearables, nutrition, beverage, financial services, telecoms, auto, airlines, consumer tech — each of these structural templates represents a distinct partnership entry point with its own budget, rights, and activation profile.

Specific deal economics

Named, disclosed deal values on the commercial side include:

- Lionel Messi signed with the Saudi Tourism Authority in 2022 as tourism ambassador under a reported $30 million engagement (Gulf Business).
- Cristiano Ronaldo's $213 million annual Al-Nassr salary is the largest disclosed annual sports salary in history (Arthnova).
- Aramco–FIFA: $600 million over four years (2024–2027) (Sporting Intelligence).
- LIV Golf: £2.5 billion cumulative commitment, including £1B+ in player contracts (Sporting Intelligence).
- PIF–ATP and PIF–WTA framework partnerships; 2024 WTA Finals in Riyadh under PIF and Riyadh Air title sponsorship (Play the Game).
- Al-Hilal earned approximately $34 million in prize money during the 2025 FIFA Club World Cup (Front Office Sports).
- PIF's $2 billion combined offer for ATP and WTA Tours (March 2024) set the ceiling on Saudi interest in owning tennis outright (Wikipedia / Public Investment Fund).
- WWE: approximately $100 million per year across a ten-year hosting contract (Council on Foreign Relations).

- Newcastle United: £305 million purchase price plus £500M+ in total PIF investment (Sporting Intelligence).
- Riyadh Air: shirt-sponsor and stadium naming rights with Atlético Madrid (Metropolitano Stadium); CONCACAF official-airline partnership (Wikipedia / Riyadh Air).

VI. Entertainment, Tourism & Cultural Programming

Saudi Arabia's entertainment and cultural programming has matured from a handful of pop-concert events in the late 2010s into one of the most ambitious live-experience calendars in the world. This section covers the dollars, the anchor events, the film and music infrastructure, and the tourism flywheel that sits underneath it all.

The GEA's $64 billion commitment

The General Entertainment Authority has committed up to $64 billion by 2028 to develop the domestic entertainment sector. As of the end of 2022, the GEA had issued more than 11,400 licenses and permits, drawing over 120 million attendees, creating more than 100,000 jobs, and seeding more than 1,000 companies in the sector. Source: International Trade Administration (trade.gov).

Riyadh Season

Riyadh Season is now one of the largest winter entertainment festivals on earth. Its inaugural 2019 edition generated approximately 6 billion Saudi riyals in revenue, drew at least 11 million visitors over 66 days, and drove a 106 percent increase in flight bookings to the capital, along with a 240 percent increase in one, two, and three-star hotel bookings. Source: Wikipedia.

The 2025 edition opened on October 10 and drew approximately one million visitors in its first 13 days. Its opening featured a global parade produced in partnership with Macy's, bringing floats from the Thanksgiving Day Parade tradition to Riyadh for the first time. The season has also served as the anchor for tennis (Six Kings Slam, WTA Finals), boxing title fights, UFC Fight Night, WWE Royal Rumble, and a deep calendar of concerts, comedy, theatrical productions, and food and beverage activations. Source: Travel And Tour World.

Riyadh Season has also pulled the top creator economy into its marketing mix. The 2025 edition launched with a 'Try Not To Enjoy It' promotional film starring MrBeast, KSI, and iShowSpeed, three of the largest creators on earth by audience. Source: The Saudi Boom.

Joy Forum and industry convening

Joy Forum, hosted inside Riyadh Season, has become the region's flagship entertainment industry convening, drawing music executives, studio heads, creator-economy operators, and platform leadership. It functions as a dealmaking and announcement venue on the model of a Cannes Lions or a Tribeca for the Middle East entertainment sector.

Saudi Tourism Authority campaigns

The Saudi Tourism Authority's 'Color Your Summer' program targeted 41 million visitors and $19.5 billion (SR 73 billion) in tourism revenue for the summer of 2025, added more than one million additional domestic flight seats, and featured more than 600 events across the country. The Winter campaign, 'Where Winter Lights Up,' included more than 1,000 activities and 500 special offers. Sources: Semafor; Business Traveller.

Cinema and film

Saudi Arabia ended its 30-year cinema ban in 2018. By April 2022, 56 movie theaters across the Kingdom had shown more than 1,144 films. The inaugural Red Sea International Film Festival screened 138 films from 67 countries in 34 languages, and has become one of the most-watched new film festivals in the world. Source: trade.gov.

Saudi Arabia has also established Saudi Media City in Riyadh as a multi-service production ecosystem to support content and talent creation domestically and attract international co-production.

Music and festivals

MDLBEAST Soundstorm has grown into one of the largest music festivals in the region, drawing global headliners and hundreds of thousands of attendees. Riyadh Season concerts have hosted major international pop, hip-hop, and Arabic music acts. Jeddah's concert calendar has grown alongside the capital's. The live-music category in Saudi Arabia is now a primary deployment path for Western touring artists and a major talent-agency opportunity.

Tourism results

In 2024, Saudi Arabia welcomed approximately 115.9 million tourists, including 29.7 million inbound visitors, and recorded total tourism spending of approximately $75.7 billion. Inbound spending reached $40.95 billion to $45 billion depending on methodology. Non-religious tourism accounted for 59 percent of inbound visits in 2024, compared to 44 percent in 2019. The average international tourist stayed 19 nights and spent approximately SR 5,669 per trip. Source: Saudi Ministry of Tourism via Arab News; Arab News.

In 2025, Saudi Arabia surpassed 122 million visitors with total tourism spending reaching approximately $81 billion, a 6 percent year-over-year increase. The Kingdom ranked first worldwide in international tourism revenue growth in Q1 2025 compared to the same period in 2019, according to the UN World Tourism Organization, with international arrivals 102 percent above pre-pandemic levels. Source: Arab News; Gulf News.

Per Ministry of Tourism data released at WEF 2026, inbound visitor spending in 2025 reached an estimated SR 159.9 billion ($42.6 billion), up approximately 4.1 percent from 2024, driving a travel account surplus of approximately SR 49.4 billion. This is the highest inbound-spending figure in the Kingdom's history. Source: Saudi Ministry of Tourism.

Travel and tourism's total economic impact on Saudi GDP reached 12.45 percent in 2024 per the World Travel and Tourism Council, up from 11.5 percent the prior year. The revised 2030 target is 150 million annual tourists, split 70 million international and 80 million domestic. Source: Arab News.

Deeper tourism detail

The breakdown of inbound visitors tells a clear story about where Saudi Arabia's branding is landing. In 2024, Asia Pacific accounted for 33 percent of inbound tourists, Middle East and North Africa accounted for 28 percent, and the Gulf Cooperation Council accounted for 27 percent. Europe contributed 8 percent, with the Americas and Africa at 2 percent each. By nationality, Egyptian tourists led at 3.2 million, with Pakistan at 2.8 million. Makkah was the top destination for both domestic and inbound tourists, receiving 43.1 million visitors combined in 2024. Source: Arab News; Argaam.

In the first half of 2025 alone, Saudi Arabia attracted more than 60.9 million visitors with total spending exceeding SR 161.4 billion. The number of international visitors grew from 3.5 million in 2021 to 29.7 million in 2024 — a 745 percent expansion over three years. Saudi Arabia's leisure-trip share of inbound travel reached 25.2 percent in 2024, and leisure trips represented 37.5 percent of all domestic tourism trips. Source: Mashroo3k Consulting; DataSaudi.

The tourism sector received SR 14.2 billion in private-sector investment in 2024, with approximately 40 percent from foreign investors. The Ministry of Tourism issued 2,853 tourism licenses by the end of 2024, a 32 percent year-over-year increase. Source: Economy Middle East.

VII. The Celebrity & Talent Economy

This is the section Western talent agents, managers, publicists, and brand-partnership leads should read twice. Saudi Arabia has emerged as the single most active celebrity and talent commissioning market in the world, and the structures of those deals have matured enough that a first-time entrant can now plan an engagement against a known playbook.

What the deals look like

Saudi celebrity engagements now cluster into five structural models:

- Appearance fees. A single-event payment for a concert, gala, sports exhibition, or Riyadh Season activation. Typically flat fee, sometimes with backend for content usage.
- Multi-year ambassadorship. A named ambassador role for a giga-project, tourism campaign, airline, or cultural property. One to three years, multi-platform deliverables, content rights, appearance obligations.
- IP co-development. A creator or talent partnership with a Saudi entity to co-develop branded content, a show format, a product line, or a scripted IP.
- Equity partnerships. A talent takes an equity stake in a Saudi-backed venture — often in entertainment, media, gaming, or hospitality — in exchange for active participation.
- Contract signings in Saudi-owned properties. The Saudi Pro League model, adapted to golf, tennis, boxing, and now increasingly to entertainment and esports.

Who is in

Football has led by volume, with Ronaldo, Benzema, Mane, Mahrez, Firmino, Toney, Kante, Laporte, Diaby, Neves, Neymar, and Cancelo all signed into the Saudi Pro League under disclosed economics. Lionel Messi was signed by the Saudi Tourism Authority as a tourism ambassador in 2022, reportedly under a $30 million engagement. Source: Gulf Business.

In tennis, Rafael Nadal is the signature ambassador to the Saudi Tennis Federation. Coco Gauff and the WTA field have headlined Riyadh. In golf, the LIV roster represents the most concentrated top-of-sport talent pool any single commercial property has assembled in the past decade.

Beyond sport, Sofia Vergara has been fronting VIA Riyadh, a luxury lifestyle destination in the capital, with her promotional content drawing millions of views. Source: Gulf Business.

In music, international headliners have performed across Riyadh Season, MDLBEAST Soundstorm, Jeddah Calendar, and Diriyah Season. In film, Red Sea International Film Festival has pulled in global filmmaking talent including Oscar-winning directors and A-list actors, operating as both a festival and a dealmaking venue.

The commissioning map

For a talent rep entering the Saudi market, there are a finite number of counterparties that control most of the budget. The priority list:

- General Entertainment Authority — overall entertainment commissioning, Riyadh Season, Jeddah Season.

- Saudi Tourism Authority — tourism ambassadors, destination marketing, 'Color Your Summer' and winter campaigns.
- Ministry of Culture — film, visual arts, music, literature.
- Public Investment Fund — strategic investments, sports, Riyadh Air, Savvy Games.
- Royal Commissions for Riyadh, AlUla, Diriyah — regional development and destination-level cultural activation.
- Giga-project entities — NEOM, Qiddiya, Red Sea Global, New Murabba, Jeddah Central.
- State-owned corporates — Aramco, Saudi Aramco Entertainment, Saudi Telecom Company, Saudia, Riyadh Air, Ma'aden.
- SRMG and state-adjacent media — increasingly commissioning original content, podcasts, and creator IP.

The single most important relationship map for Western talent representation is understanding the roles held by Yasir Al-Rumayyan, governor of the PIF. He is reported to hold more than 20 key decision-making roles, chairing Aramco, Newcastle United, Riyadh Air, and the Saudi Golf Federation, and effectively leading LIV Golf and sitting on the board of the Saudi Olympic & Paralympic Committee. Any talent engagement at meaningful scale routes through his ecosystem. Source: Play the Game.

Growth categories for 2026 to 2030

Based on both publicly reported deal flow and the commissioning pipeline, the categories where new talent deal volume will concentrate over the next four years include:

- Female talent for tourism, giga-project, fashion, and wellness ambassadorships — a structural priority area for Saudi cultural programming.
- Family-facing entertainment talent to anchor Qiddiya IP and seasonal programming at major venues.
- Creator-to-celebrity crossovers, particularly in gaming, sports entertainment, and lifestyle content.
- Chefs and hospitality talent as restaurant partnerships anchor Red Sea, AlUla, Diriyah, and Jeddah openings.
- Music producers and A&R talent as Saudi Arabia builds a domestic music production pipeline.
- Esports personalities and streamers alongside the Esports World Cup and Savvy Games platform.
- Film directors and producers as Red Sea IFF and local production capacity scale.

Talent categories and what's in each

Sport

The deepest and most active category. Football (Saudi Pro League, Newcastle), golf (LIV), tennis (ATP/WTA partnerships, ambassadors), boxing (heavyweight cards, undercards), MMA (UFC, PFL), WWE, Formula 1, esports. The economics are disclosed, the commissioning pipeline is mature, and the deal flow is consistent. Ambitious Western sports talent with pan-global brand equity can now expect competitive offers for appearance, exhibition, endorsement, and equity roles.

Music

Riyadh Season, MDLBEAST Soundstorm, Jeddah Calendar, and Diriyah Season have made Saudi Arabia one of the most actively touring markets in the world. Pop, hip-hop, EDM, Latin, and Arabic music have all played major Saudi events. For Western touring artists, Saudi shows now routinely command top-of-market performance fees and have become a core part of annual tour routing. For music-industry partners — management, labels, publishing, merch — the in-market opportunity extends beyond individual shows into residency programming, festival partnerships, and original IP development with Saudi commissioning entities.

Film and television

Red Sea International Film Festival has become a significant annual fixture for Western filmmakers, talent, and executives. NEOM's film studio capacity, Saudi Media City, and growing domestic production financing have opened Saudi Arabia as both a filming destination and a co-production partner. Scripted IP and unscripted formats are being commissioned at rising scale. Western directors, producers, showrunners, and above-the-line talent have a genuine new market to work inside.

Digital creators

The commissioning pattern for Western digital creators is typically event-anchored: Riyadh Season trips, giga-project opening content series, Saudi Tourism Authority destination campaigns, and brand-activation partnerships. Top Western creators have been integrated into Saudi campaigns at meaningful fee levels. The window for establishing credible Saudi programming — with repeat deployments that build audience recognition inside the Kingdom — is the next 24 to 36 months.

Lifestyle, fashion, and beauty

Riyadh Fashion Week, VIA Riyadh, and high-end retail activations at Diriyah and AlUla have created a lifestyle-talent lane. Fashion designers, beauty entrepreneurs, culinary talent, and wellness figures are increasingly engaged as brand ambassadors for Saudi properties. The female-talent opportunity in these categories is particularly large, given the structural gender gap in the Saudi creator economy and the deliberate programming emphasis on female leadership in tourism, fashion, and cultural domains.

Hospitality and culinary

Celebrity chefs and hospitality operators are being signed into resort launches on the Red Sea, at AlUla, at Diriyah's Bujairi Terrace, and inside new-build Riyadh hotels. Licensed restaurant concepts, culinary residencies, and chef-led event programming are active commissioning categories for anyone with a recognizable brand in global F&B.

A standardized talent engagement lifecycle

A mature Saudi talent engagement typically moves through six phases, each of which benefits from an experienced intermediary:

- Phase 1: Pipeline qualification. Identify the right commissioning entity, match the talent's capabilities to a real Saudi need, and confirm budget and timing.
- Phase 2: Framework negotiation. Scope of work, fees, rights, territory, content obligations, confidentiality, exclusivity, and exit terms.

- Phase 3: Cultural and compliance review. Costume, content, public appearance, social media, and creative parameters aligned with Saudi norms and Mawthooq standards.
- Phase 4: Activation design. On-the-ground plan for events, content capture, appearances, and media opportunities.
- Phase 5: Execution. Production, travel, hospitality, security, logistics, live content management, and on-site talent support.
- Phase 6: Post-activation amplification. Content distribution on global and regional platforms, earned media, partner content usage, and follow-on pipeline development.

The quality of representation in phases 1, 2, and 6 is where most of the long-term value is created or lost. Brands and talent that short-cut qualification, framework negotiation, or amplification leave significant economic and reputational value on the table.

What will win in the market

The talent that will do best in Saudi Arabia over the next five years are the ones who arrive with a multi-surface strategy: not a single appearance, not a single campaign, but a long engagement across events, content, hospitality, product, and platform. The commissioning side is increasingly rewarding partners who want to build inside the market, not visit it. Representation strategies should build accordingly: relationships first, announcements second, activations third.

VIII. The Creator & Influencer Layer

If sports is the flagship and entertainment is the flywheel, the creator economy is the distribution engine. Saudi Arabia's creator and influencer sector is the fastest-growing channel in its entire agency market, the most trusted advertising format for Saudi consumers under 35, and the single most scalable surface for brand participation inside the Kingdom.

Market size and growth

The Saudi influencer advertising market was projected at approximately $95.69 million in 2025. Source: Soogk.

The broader creator economy grew by 32.37 percent in Q1 2025. Influencer and creator marketing is the fastest-growing channel inside Saudi Arabia's marketing and advertising agency sector, expanding at approximately 6.72 percent CAGR, outpacing all other channels. Sources: Fast Company Middle East; Mordor Intelligence.

Platform dynamics

TikTok reaches approximately 88 percent of the Saudi population, making it the single largest reach platform in the country. Snapchat, YouTube, and Instagram each command significant share. X (formerly Twitter) remains structurally important for news and public discourse. Source: Fast Company Middle East.

YouTube's advertising reach in Saudi Arabia is approximately 32.5 million users. The audience skew — young, digital-first, Arabic-dominant with strong English literacy — makes the country one of the most attractive creator-addressable populations in the world on a per-capita basis.

Regulation as a credibility mechanism

Saudi Arabia regulates creator activity through the General Commission for Audiovisual Media (GCAM) and the Mawthooq licensing framework. More than 10,000 content-creator licenses have been issued. Unlike algorithm-only markets, Saudi regulation actively reinforces transparency, disclosure, and audience trust — effectively turning regulation into a brand-safety and credibility mechanism for advertisers. Sources: Arab News; Frontiers in Communication.

For Western brands used to the US and UK regulatory environments, this is a material positive. Saudi creator activity runs inside a more compliance-forward ecosystem than in most Western markets, reducing disclosure risk and brand-safety exposure.

Ecosystem infrastructure

The Kingdom has built ecosystem infrastructure around creators: Saudi Media City in Riyadh, the Riyadh Creative District, specialized talent and production agencies, training programs, and brand-partnership intermediaries. The national media sector target is SR 47 billion ($12.5 billion) in output and 150,000 jobs by 2030, roughly 0.8 percent of GDP. Source: Arab News.

Creator demographics and gender

The creator split in Saudi Arabia is approximately 63 percent male and 37 percent female, representing both a structural gap and a clear investment opportunity. Brand pipelines that specifically commission and develop female creators will move ahead of competitors in fashion, beauty, parenting, travel, wellness, and F&B. Source: Fast Company Middle East.

Top creators and their business footprint

The Arab creator economy produces a set of operators running at eight- and nine-figure business scale. Huda Kattan has built Huda Beauty, Wishful Skin, and Kayali Fragrance into one of the most significant independent beauty groups in the world, with a combined social footprint exceeding 55 million followers. Abir El Saghir commands a 58 million-plus following across platforms. Joelle Group has opened flagship clinics in Dubai Hills and Riyadh. Top-tier Arab influencers earn $1 million to $10 million or more annually from a mix of sponsored content, brand deals, product lines, and appearances. Source: The Middle East Insider.

Creator-driven commerce

User-generated content is driving a measurable shift in Saudi commerce. Audiences trust real creators more than traditional advertising, and brands are increasingly moving budget from conventional media buys to creator portfolios that balance reach and authenticity. Short-form video remains the dominant unit of creator commerce, and Saudi creators are building Arabic-first content IP — with cultural relevance, regional adaptability, and Ramadan seasonality — as a core differentiator.

Implication for Western brands

The creator layer is the fastest way for a Western brand to enter the Saudi market at meaningful scale without a capital commitment. A well-structured creator program — ideally Arabic-first, ideally aligned to the seasonal calendar, ideally mixing mid-tier and mega creators across TikTok, Snap, and YouTube — can build brand equity in the Kingdom in a single calendar year. For Western creators with global reach, the 2026 to 2028 window is the right window to build pipelines into Saudi brand briefs, Riyadh Season activations, and giga-project launches.

Platform-by-platform reach

YouTube's potential ad reach in Saudi Arabia is approximately 32.5 million users. Average ad spending per internet user is roughly $44.15. Saudi Arabia introduced a 15 percent VAT on all advertising services in 2020, which has been priced into agency and creator rate cards since. Ad spending per mobile internet user in the in-app market is measured in the mid-double-digits per user annually. Source: WiFi Talents; Statista.

Arab social media reached 190 million active users by 2023 with the highest average daily usage globally at 3.5 hours. For a brand buying reach in Saudi Arabia specifically, the $44.15 ad spend per user benchmark is useful — it implies roughly $1.5 billion in purely internet-addressable advertising capacity on a per-user basis at the current user base, and is projected to rise as per-capita spending grows. Source: Market Data Forecast.

Audience purchasing behavior

Saudi consumers prefer home-grown brands 62 percent of the time over international brands, a number that has held steady as the domestic consumer-brand sector has matured. That said, internationally-branded products continue to hold strong share in premium and luxury categories, in fashion, beauty, tech, and automotive. For Western brands entering Saudi Arabia, the competitive challenge is differentiation against both international peers and a rising set of Saudi and GCC-based competitors — meaning positioning, creator endorsement, and local credibility signals matter disproportionately. Source: WiFi Talents.

IX. Category Deep-Dives

FMCG and retail

Consumer goods generated 31.35 percent of agency market revenue in 2025, making FMCG the single largest advertising category in Saudi Arabia. FMCG remains the largest spender on television advertising, supported by brands such as Almarai, Snickers, and regional dairy and food brands dominating ad-awareness league tables. In January 2026, Snickers and Almarai led all advertisers by percentage-point uplift in ad awareness, alongside the Al Mamlaka (Kingdom Tower) brand. Retail and e-commerce spending has accelerated alongside a maturing logistics and payments infrastructure. Sources: Mordor Intelligence; YouGov.

For Western FMCG, the opportunity is category expansion inside Saudi's modernizing retail environment, anchored by organized supermarket and convenience formats, localized brand extensions, and a consumer base with rising disposable income and improving purchase-decision data. PepsiCo's opening of a new regional headquarters in Riyadh in 2025 is a leading-edge signal.

Tourism and hospitality

The domestic hospitality market has a current value of approximately $27.1 billion in 2025 and is expected to reach $54.3 billion by 2030, growing at a 7.4 percent CAGR. Chain hotels hold a 58.4 percent share. Luxury accommodation grew to a 37.3 percent market share in 2024. Approximately 61 percent of hotel rooms are classified as luxury, upscale, or upper upscale. Serviced apartments are the fastest-growing segment, expanding at 12.6 percent CAGR. Source: Oxford Business Group.

Inbound room occupancy has moved materially. AlUla's 'Forever Revitalising' campaign, launched in 2024, delivered a 37 percent increase in tourist arrivals and a 56.3 percent increase in regional room occupancy in its first year. Approximately 57 percent of 2024 visitors stayed in hotels, with apartments and private residences the next-most-popular options. Makkah and Al Madinah were the most popular inbound destinations. Riyadh and the Eastern Province led domestic travel. Source: Oxford Business Group.

The opportunity for Western partners lies in operator mandates, F&B concept licensing, luxury retail residencies inside hospitality properties, and lifestyle media partnerships for hotel openings.

Fintech and financial services

Vision 2030 has supported the creation of 525 fintech firms, with the Saudi Central Bank and Capital Market Authority backing a series of regulatory innovations that have accelerated digital banking, payments, wealth management, and insurance technology. The fintech advertising market is mid-sized today and growing rapidly as consumer-facing fintechs scale brand investment. Source: Mordor Intelligence.

The most significant opportunity for Western financial brands and fintech marketing is the commercial and wealth-management category, supported by a large and growing high-net-worth domestic population and rising inbound capital inflows.

Gaming

Gaming is Saudi Arabia's largest single media category, with the games market volume reaching approximately $2.29 billion. Approximately 67 percent of the population games. Savvy Games Group, a PIF subsidiary, has emerged as one of the most active acquirers in global gaming, including talks to buy the video-game business of Pokémon Go developer Niantic for $3.5 billion. Esports World Cup anchors the international gaming calendar in Riyadh. Sources: Soogk; USSBC.

For Western gaming publishers, hardware manufacturers, esports organizations, and streaming platforms, Saudi Arabia is both the largest MENA gaming market and a strategic capital partner. In-game advertising revenue in the Kingdom is growing at approximately 12 percent annually.

Luxury and fashion

Saudi Arabia is one of the fastest-growing luxury markets in the world. Historic Jeddah, Riyadh's emerging luxury district around VIA Riyadh, Diriyah's Bujairi Terrace, and AlUla's boutique hospitality are building the retail infrastructure to support ultra-premium brand flagship openings. Luxury maisons including LVMH, Kering, and Richemont brands have been expanding across Saudi over the past three years, with flagship openings in Riyadh and Jeddah anchored by prestige marketing programs and celebrity-led activations.

The opportunity for Western luxury houses is particularly concentrated in the next generation of high-net-worth Saudi consumers, who increasingly prefer to purchase domestically rather than offshore, reversing a long pattern of outbound luxury shopping to London, Paris, Milan, Dubai, and New York. The domestic luxury retail build-out over the next five years will accelerate that reversal.

Automotive

Automotive is one of the largest advertising categories in Saudi Arabia and is being reshaped by two dynamics: the buildout of electric-vehicle infrastructure (with PIF-backed Lucid Motors and Ceer positioned as domestic EV players), and the continued depth of traditional ICE and luxury auto demand in the Gulf's largest consumer base. Formula 1's annual Saudi presence, Formula E, and Qiddiya's motorsport programming make auto-brand activation inside live sport a distinctively powerful channel in this market.

Wellness and fitness

Wellness and fitness are strategic categories inside Vision 2030's citizen-outcomes program. Obesity rates and sedentary-lifestyle risks have motivated significant public investment in sports participation, gyms, nutrition education, and wellness tourism. Global wellness brands — fitness equipment makers, studio operators, nutrition brands, wellness retreats — have a clear commercial opening anchored against a government-backed public-health agenda.

Technology and AI

Saudi Arabia has become one of the most active destinations for global technology partnerships, backed by major commitments from Groq, Salesforce, Accenture, Google Cloud, ServiceNow, IBM, and others. For technology brands, the Saudi opportunity is both a customer opportunity (state and enterprise demand) and a capital opportunity (PIF and state-linked investment). Marketing activity in the technology category is increasingly sophisticated, with significant thought-leadership and B2B programming around AI, cloud, fintech, and cybersecurity.

Beauty

The Saudi beauty market is dominated by social and creator-led commerce. Huda Beauty, as one example, operates at the center of a regional category that has been built largely through creator content. For Western beauty brands, the entry path runs through creator partnerships, targeted Arabic-first content programs, and physical retail presence inside premium shopping destinations. Rising per-capita spend, a young consumer base, and a robust e-commerce infrastructure make beauty one of the highest-return categories for incoming brands.

X. The Western Partner Playbook

This section is the operational core of the report. It lays out entry models, commissioning-side mapping, the activation calendar, capability requirements, and a due-diligence checklist that a Western brand, agency, or talent team can use to plan its first 24 months in the market.

Entry models

Western partners typically enter the Saudi market through one or more of six models:

- Direct sponsor or advertiser. Paid media and sponsorship commitments to Saudi properties (Riyadh Season, LIV Golf, Red Sea IFF, Esports World Cup, Saudi Pro League, etc.).
- Ambassador or brand partnership. Named partnership with a Saudi entity — tourism authority, airline, giga-project, state corporate.
- Licensee. Licensing a brand, IP, or format to a Saudi operator or giga-project for local execution.
- Joint venture. A structured JV with a Saudi partner, typically in hospitality, media, entertainment, or technology.
- Content co-production. Scripted or unscripted content developed in partnership with a Saudi or pan-Arab producer and distributed regionally or globally.
- Agency mandate. A retained or project-based mandate from a Saudi commissioning entity to deliver creative, media, or integrated marketing services.

Activation calendar

The Saudi marketing calendar has hard peaks and troughs. Planning against them is essential.

- Ramadan (typically Feb–Mar). The single most important commercial and advertising window of the year. Premium rates, peak engagement, required cultural sensitivity.
- Riyadh Season (Oct–Mar). The anchor entertainment window for concerts, sports, dining, and celebrity activation.
- Saudi Summer (Jun–Sept). Domestic tourism, destination campaigns, regional travel programming.
- National Day (Sept 23) and Founding Day (Feb 22). Heavy brand participation around national identity and heritage.
- Saudi Arabian Grand Prix weekend. Typically March, in Jeddah, with concerts, F1 activation, and hospitality programming.
- Hajj period. Religious tourism peak; restraint around commercial activity, but meaningful for hospitality, transport, and telecoms.
- Giga-project openings. Ongoing through 2030, each a standalone launch moment with associated press, content, and hospitality activation.

Capability requirements

A Western partner operating credibly in Saudi Arabia needs, at minimum:

- Arabic creative capability. First-language copywriting, cultural localization, dialectal nuance.

- Local production. On-ground film, photography, and experiential capability in Riyadh and Jeddah.
- KSA-licensed talent and creator representation. Alignment with Mawthooq and GCAM standards.
- Compliance workflow. Disclosure, content approval, and brand-safety discipline.
- Government-relations sophistication. The ability to read and move inside a commissioning environment that blends public, state-linked, and private interests.

Due diligence checklist

Before committing to a major Saudi engagement, partners should verify:

- Commissioning entity, decision-maker, and budget authority.
- Delivery partner (typically a Saudi or pan-Arab agency, production company, or event operator).
- IP and content-rights structure, including territory, duration, and platform scope.
- Talent obligations and backout clauses.
- Payment terms and working-capital treatment (public-sector payment delays have been a noted industry issue).
- Compliance with domestic cultural and regulatory standards.
- Exit structure, brand-continuation rights, and post-engagement content usage.

XI. Ten Opportunities for 2026 to 2030

From the commissioning pipeline and the structural gaps identified in this study, ten specific opportunity areas stand out for Western brands, talent, and agency partners over the next four years.

1. Female-talent ambassadorships for giga-projects. Structural priority, open roster, meaningful multi-year economics.

2. Family-entertainment IP for Qiddiya. Theme-park and live-entertainment IP licensing, scripted family content, and touring-show partnerships.

3. Arabic-first creator studios. Integrated creator production houses serving Riyadh Season, Saudi Tourism Authority, and the giga-projects.

4. Hospitality brand launches on the Red Sea and in AlUla. Food and beverage, wellness, fitness, and luxury-retail residency programs inside ultra-luxury resort openings.

5. Inbound-tourism creator programs from priority feeder markets. Structured creator programs from the US, UK, China, India, and the GCC feeding into Saudi Tourism Authority's campaigns.

6. 2034 World Cup activation real estate. Early-stage sponsorship, hospitality, and talent inventory. Inventory will lock in waves starting in 2027.

7. Music-festival talent pipelines. Headline and support talent across Riyadh Season, MDLBEAST Soundstorm, and the expanding Jeddah calendar.

8. Esports sponsorship and creator packages. Alongside the Esports World Cup and the Savvy Games platform, Western brands can build measurable gaming-audience positions inside one of the world's most gaming-active populations.

9. Wellness and sport-performance brands inside the Saudi Pro League and LIV Golf. Athlete-partnership, facility-partnership, and consumer-product positioning.

10. Luxury brand residencies at Diriyah and AlUla. Fashion, beauty, fine dining, and experiential retail activations tied to cultural and heritage programming.

XII. Five-Year Forecast: 2026 to 2030

The Saudi brand, celebrity, and cultural-influence economy will evolve through three distinct phases between now and 2030. Western partners should plan their market entry and commitment profiles against this trajectory.

Phase 1 (2026–2027): Professionalization and measurement

The current phase is defined by the transition from visibility-driven to accountable marketing. Ministries and state-linked institutions are increasingly tying budgets to transformation KPIs. Private firms are demanding stronger business cases. Industry consolidation around specialist providers — performance, analytics, influencer, gaming, vertical expertise — is accelerating. Talent inflation is moderating as local capacity builds. Giga-project brand positioning is increasingly sophisticated and segmented.

For Western partners, this is the window to build relationships, open offices, stand up Arabic creative capability, and negotiate first major engagements before 2028 inventory scarcity sets in. Partners who arrive in 2028 will be competing against partners who started in 2026 with warm commissioning relationships already in place.

Phase 2 (2028–2030): Pre–World Cup and Expo 2030 buildup

The period leading into Expo 2030 and the 2034 World Cup qualifying phases will produce the most intense concentration of brand, talent, and sponsorship activity in Saudi Arabia's commercial history. Hospitality rooms come online, giga-project openings accelerate, tourism campaigns hit their pre-150M-visitor crescendo, and every major global brand that has been building toward a Saudi position will move to execution.

Inventory scarcity will set in across the top categories: World Cup official-sponsor tier, LIV Golf roster slots, Saudi Pro League playing contracts, prime Riyadh Season event dates, flagship giga-project ambassador roles, and top-tier creator slots. Pricing will reflect the demand imbalance. Partners with warm relationships and locked inventory will hold meaningful competitive advantage.

Phase 3 (2031–2034): Execution and legacy

The execution phase will bring the full Vision 2030 brand infrastructure online. Expo 2030 Riyadh in 2029–2030. Major giga-project completions. World Cup 2034 delivery. Institutional brands, not just PIF-funded properties, will increasingly drive the commercial conversation. Saudi Arabia will have graduated from a market to watch into a market to operate inside — on a par with the UAE and significantly ahead of every other MENA market for most brand categories.

Western partners who have built in-market presence through 2028 will be positioned to grow aggressively through this execution phase. Partners who have not will find themselves competing for increasingly scarce share with both local and international competitors who have already built relationships and credibility.

Quantitative projections

Synthesizing the market forecasts in this report, our central estimates for 2030 include:

- Total advertising market in the range of $3.5 billion to $5 billion (methodology-dependent), with digital at roughly 90% of total spend.
- Influencer and creator marketing spend of $200M to $250M, with female creators closing the current 37% representation gap.
- Tourism: 150M visitors (70M international, 80M domestic), tourism GDP contribution of 10%+.
- Sports sponsorship inventory locked, with PIF portfolio stabilized and additional non-PIF brand spending activated.
- Hospitality rooms approaching the 2030 target of approximately 315,000 rooms in total national inventory, including the 136,000-room PIF pipeline.
- Entertainment sector output of SR 47B ($12.5B), with 150,000 media-sector jobs.

XIII. Narrative, Press & Global Coverage

Saudi Arabia's marketing and brand economy lives inside a specific global narrative. Understanding that narrative is critical for Western partners, because how brand partnerships are covered in Western media materially affects the value and durability of those partnerships.

How Western media covers Saudi brand spending

Western business and sports media have developed a mature, data-rich, and broadly positive coverage beat around Saudi brand and tourism investment. Bloomberg, the Financial Times, Reuters, the Wall Street Journal, and the Associated Press have each published substantial coverage of Vision 2030, PIF, Saudi Tourism Authority campaigns, and named giga-projects. Trade titles — Sportico, Front Office Sports, Variety, The Hollywood Reporter, Campaign, Adweek, Ad Age, Sports Business Journal — provide a sophisticated ongoing read on deal flow and strategy.

The coverage profile has evolved. Early Western coverage (2016–2019) tended to treat Saudi sports and entertainment investment as novelty or as isolated incidents. Mid-phase coverage (2020–2022) was dominated by human-rights framing around select deals. Current coverage (2024–2026) is increasingly strategic, economic, and data-driven, treating Saudi Arabia as a serious commercial market with distinct investment logic rather than as a primarily political story.

The communications implication for Western partners

Western brands, talent, and agencies engaging with Saudi Arabia should plan on integrated US and international communications programs that travel with the underlying deals. These programs should focus on commercial logic, measurable impact, cultural engagement, and long-term partnership structure. Coverage hooks that work: inbound tourism growth, job creation, creator economy development, sport as infrastructure for domestic fitness and youth participation, cultural export, and technology collaboration.

Effective Western communications around Saudi engagements emphasize the forward-looking commercial story and treat the Kingdom as a credible counterparty with serious strategic objectives. The partners who manage communications most effectively also manage the pace of disclosure — typically announcing at moments that align with major Saudi events (Riyadh Season, Formula 1 weekend, giga-project openings, Future Investment Initiative), which concentrates press attention and associates the announcement with the broader momentum of the Kingdom's program.

Measurement and evaluation framework

Modern Saudi brand programs should be measured on a consolidated framework combining direct commercial impact (inbound visitation, licensing revenue, sponsorship ROI), brand equity impact (ad awareness, brand consideration, NPS), and narrative impact (share of voice, sentiment, quality of placement, narrative alignment). Brands that treat measurement as a pre-commitment discipline — not a post-campaign look-back — are the ones that build durable, scaling positions in the Kingdom.

XIV. Methodology & Sources

This report is built on publicly available data, sector analyses, and reporting from leading trade and general business media. Every numerical claim in this report is sourced to a named, linked external reference. Readers can verify every statistic by following the citation links.

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XV. About Everything-PR

Everything-PR is a leading independent news, analysis, and research platform covering the global public relations, communications, marketing, and brand industries. With a focus on the strategies, deals, leaders, and trends shaping modern communications, Everything-PR publishes daily reporting, industry analysis, and long-form research for agency principals, CMOs, founders, investors, talent representatives, and communications executives worldwide.

Everything-PR Research publishes in-depth, fully sourced studies on the most consequential shifts in the global brand economy. Each study combines sector sizing, named-deal economics, operator interviews, and strategic forecasting. All data is verified against public sources and linked inline. Reports are built to be useful — not promotional.

This study, The Kingdom's Moment, is part of Everything-PR Research's 2026 international-markets series. Past and upcoming studies cover related shifts in the UAE, India, Southeast Asia, and Latin America.

Everything-PR welcomes media inquiries, republication requests, and partnership conversations. Contact: everything-pr.com.

Appendix: Key Data Tables

Table 1: Saudi Arabia Advertising Market Trajectory

Metric	2025	2029
Total Ad Market (Statista)	$2.54B	$3.39B
Digital Ad Spend	$4.01B	$7.98B
Agency Services Market	$3.03B	$4.14B (2031)
Influencer Ad Market	$95.69M	Growing 6.72% CAGR
Gaming Media Market	$2.29B	Growing 12% annually

Table 2: PIF and Saudi Sports Investment Summary

Property / Asset	Disclosed Economics
Saudi Pro League (foreign players, 2023–25)	$3B+ total
Cristiano Ronaldo (Al-Nassr)	$213M/year through 2027
Neymar (Al-Hilal)	$90M transfer + $100M/year
Newcastle United (PIF)	£500M+ total cost
LIV Golf	£2.5B committed
Aramco–FIFA partnership (2024–27)	$600M / 4 years
WWE hosting (2018–28)	~$100M/year × 10 years
Formula 1 (Aramco + related)	~£1B cumulative
Total PIF sports sponsorships	346
Total Saudi-linked sponsorships globally	~910

Table 3: Saudi Tourism Performance

Metric	2024	2025
Total visitors	115.9M	122M
Inbound tourists	29.7M	~30M+
Total tourism spend	$75.7B	$81B
Non-religious share of inbound	59%	~59–60%

Travel & tourism contribution to GDP	12.45%	Rising
2030 target	—	150M visitors

Table 4: Saudi Marketing Calendar — Key Windows

Window	Typical Timing	What Drives It
Founding Day	February 22	National identity, heritage programming
F1 Weekend	March (Jeddah)	Hospitality, concerts, international press
Ramadan	Feb–Mar (shifts annually)	Peak commerce, premium TV, creator content
Saudi Summer	June–September	Domestic tourism, 600+ events
Hajj	June–July (shifts annually)	Religious tourism peak; commercial restraint
National Day	September 23	Patriotic branding, heritage campaigns
Riyadh Season	October–March	Global entertainment anchor: sports, music, food
Joy Forum	October (inside Riyadh Season)	Entertainment industry dealmaking
Red Sea Film Fest	December (Jeddah)	Global film industry, talent attendance
FII	October (Riyadh)	Global investment and deals summit

Table 5: Commissioning Entities and Focus Areas

Entity	Commissioning Focus
Public Investment Fund (PIF)	Sports, Riyadh Air, Savvy Games, strategic investments, giga-projects via subsidiaries
General Entertainment Authority (GEA)	Riyadh Season, Jeddah Season, Joy Forum, entertainment licensing and event programming
Ministry of Culture	Film, visual arts, music, literature, cultural festivals
Saudi Tourism Authority	Destination marketing, tourism ambassadors, 'Color Your Summer' and seasonal campaigns

RCU (AlUla)	AlUla cultural programming, luxury tourism, Hegra heritage
Diriyah Gate Development Authority	Diriyah heritage, Bujairi Terrace, cultural residencies
NEOM	THE LINE, Oxagon, Trojena, Sindalah global brand campaigns, film, luxury partnerships
Qiddiya Investment Co.	Entertainment IP licensing, theme park operators, motorsport, family attractions
Red Sea Global	Luxury coastal hospitality operators, F&B and wellness partnerships
Aramco	F1, FIFA, global corporate sponsorships, energy-sector marketing
Saudia / Riyadh Air	Aviation sponsorships, loyalty programs, route marketing
STC	Telecoms, digital, sport, sponsorship-heavy marketing