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العنوان باللغة العربية

مدى إمكانية تأثير أحداث ثورة في صناعة الألعاب على المهتمين والممارسين والمؤثمة مع متطلبات وتداعيات رؤية 2030
في العاصمة الرياض

Title in English

THE POTENTIAL **EFFECTS** TO REVOLUTIONIZE THE GAMING INDUSTRY IN The capital
of SAUDI ARABIA's RIYADH On Saudi Gamers AND ALIGNMENT WITH VISION 2030
Implications.

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Certification

I, Fahad Mazoug Al Mohammed, declare that this thesis submitted in fulfillment of the requirements for the study of the degree Master of Project Management, from the University of Midocean, is wholly my own work unless otherwise referenced or acknowledged. This document has not been submitted for qualifications at any other academic institution.

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Chapter 1:

INTRODUCTION

Since its introduction to the Saudi market in the early 1980s, video games have become an increasingly popular medium in the country. With a rise in both market share and consumer base, the culture of the Saudi gaming community has developed unique characteristics and practices. The Saudi gaming culture is multifaceted, with varying degrees of influence derived from both the local multicultural heritage and the larger worldwide gaming community. However, cultural influence is not restricted to these two sources, since numerous elements play a role in moulding the Saudi gaming community's realities. As the country with the largest Arab GDP (WorldBank, 2020), it is expected that the spending power and preferences of the average Saudi consumer would differ from those of other Arab countries. Occupying 17.7% of total online purchases of Saudi consumers in 2019 (CITC, 2019), and an estimated market of \$946 million in combined spending on mobile, console and PC games in 2021

(Elliott, 2021), the video game market is one of the largest in the region. This impacts a variety of factors, including increased access to global and local gaming content. In addition to its economic standing, Saudi Arabia's geopolitical and cultural significance distinguishes it from other states in the region. Saudi gamers' choices and practices are influenced by a variety of variables, including their political dispositions different to that of neighboring countries (Omar AbdulAziz S. AlKhamees,2023).

PROBLEM STATEMENT

The establishment of the gaming industry in Riyadh, KSA as an "ecosystem" is a possibility that requires careful consideration. It is essential to ensure that what we are witnessing is not just a temporary trend resulting from government support and promotion. If this is not the case, we must develop the ecosystem and infrastructure to support the gaming industry. This raises questions about the roles and responsibilities of those involved and how to align with the requirements of Vision 2030. It is necessary to identify who is responsible for what and what their responsibilities are. The requirements of Vision 2030 in this regard are currently unclear. Therefore, it is critical to align and link the ecosystem and infrastructure development with the vision to achieve the desired outcome. This will require a comprehensive understanding of the industry's needs and careful planning to create a sustainable and thriving gaming ecosystem in Riyadh, KSA.

STUDY PURPOSES

This research aims to explore and identify the possibilities and strategies for revolutionizing the gaming industry in Riyadh, KSA, and to determine its effects on Saudi gamers. Due to the complexity of this task, it is difficult to predict, confirm, and answer the possible positive, negative, and successful views in a way that aligns with Vision 2030. The analysis will involve a critical examination of the current status quo and an attempt to predict future trends. Most specialists and economists in the industry, in KSA and overseas, focus mainly on investment, profitability, bargaining power, and purchasing power, and how to generate income, as profitability is the main factor of success in this field. However, they have yet to address the ecosystem and infrastructure perspectives, which are essential for ensuring sustainability and enhancing the development of the industry in a manner that fosters and trains Saudi human capital with clear regulations that maintain the industry's promise and attract investors, rather than solely focusing on consumers and game buyers. Therefore, it is critical to consider academic and practical perspectives at this stage to align with Vision 2030 and establish Saudi Arabia as the future global hub for various types of video and mobile games.

The establishment of the gaming industry in Riyadh, KSA as an "ecosystem" is a possibility that requires careful consideration. It is essential to ensure that what we are witnessing is not just a temporary trend resulting from government support and promotion. If this is not the case, we must develop the ecosystem and infrastructure to support the gaming industry. This raises questions about the roles and responsibilities of those involved and how to align with the requirements of Vision 2030, which are (: increase revenue and profit; hardware and technology development; center of the game in MENA; HUB of the game production; e-sports investments; Establishing infrastructure for gamification, regulations, policies, and procedures; grooming and fostering Saudi talents and learning them to manage and compete in the region; and hosting gaming hackathons, competitions, and international awards) . It is necessary to identify who is responsible for what and what their responsibilities are. The requirements delivery of Vision 2030 in this regard are currently unclear. Therefore, it is critical to align and link the ecosystem and infrastructure development with the vision to achieve the desired outcome. This will require a comprehensive understanding of the industry's needs and careful planning to create a sustainable and thriving gaming ecosystem in Riyadh, KSA

From the above, the study problem can be formulated in the following question:

Do you think that gaming industry will be established in Riyadh KSA as "ECOSYSTEM"?

How can we make sure about what we are watching and noticing is not just a temporary trend due to governmental pushing and embracing? If not, what do we need to do to design the ecosystem and Infrastructure?

Who is who responsible for what and what are their roles and responsibility?

Is the vision 2030's requirements in this regard clear? If yes, how to align and link to them in order to achieve it" vision2030" and what would be the impact overall?

Study Terminology:

Gamers; means all stakeholders might be involved & affected directly or indirectly positively or negatively (investors, producers, regulators, players, and communities)

HUB: Main center and regulator of gaming in the MENA and operations.

Casual Game: a type of video game targeted at a mass market audience involves simpler rules, shorter sessions basic skills

Super Casual Game or Midcore: a type of video game litter difficult casual

Hardcore Game: a type of games targeted at hobbyist gamers and more difficult than the causal and midcore. Sometime needs more time to complete.

AA Game: A studio/game with a bigger budget than an indie but a smaller budget than a AAA (triple-A) studio.

AAA Game: A major video game publisher or video game studio, in terms of budget (for both development and marketing).

Console Game: an electronic device that outputs a video Singler image to display a video game that can be played with a game controller like play stations.

Localization: the action of customization of a game from a different culture and language to a national culture and language.

Gamification: The act of design a game from end to end.

Chapter 2:

ABSTRACT

Objective: This research aims to explore and identify the possibilities and strategies for revolutionizing the gaming industry in Riyadh, KSA, and to determine its effects on Saudi gamers. Due to the complexity of this task, it is difficult to predict, confirm, and answer the possible positive, negative, and successful views in a way that aligns with Vision 2030 to establish a robust Ecosystem.

Methods: A cross-sectional study questionnaire and three opened questions, was sent to 130 individuals, only received responses from 60 individuals aged 16-55 years and beyond was conducted using an internet-based questionnaire and three opened questions form. The study investigated the effects of revolutionizing the gaming industry on Saudi Gamers and alignment with vision 2030.

Results:

The document outlines a comprehensive strategy for developing the gaming industry and integrating gamification into the educational system in Riyadh, Saudi Arabia. The first section emphasizes the need for a governmental regulator to facilitate partnerships with well-known

Western gamification educational institutes, joint-venture investments, and secondment programs for Saudi talents with international companies. It also highlights the importance of including gaming subjects in the curriculum of various educational levels and establishing gaming incubators for school students. Furthermore, the document stresses the significance of government funding regulation, partnership among governmental entities, and a clear strategy for start-up Saudi gaming companies.

In the subsequent section, the focus shifts to the importance of Saudi gamers' education, self-learning, and mastering required skill sets. It also mentions successful Saudi game examples and the time required for game design, as well as the profitability and compatibility of console and mobile games. The potential of e-sports to enhance the gaming industry and the significance of localization in game design and production are also highlighted.

Moving forward, the document discusses the significance of localization in games, particularly in reflecting culture and specific nationalities, and the potential for Western games to be localized to Arabic versions. It also emphasizes the importance of incorporating Saudi/Multiple-Dialects in games and the unique archetypes culture presented by Saudi gamers.

Finally, the document raises thought-provoking questions about establishing Riyadh as a gaming MENA and global hub, successfully incorporating gamification into the Saudi Arabian educational system, the potential for cooperation with educational institutions, the need for innovation and creativity in the games industry, and the ability of Saudis to develop the games ecosystem and infrastructure in Riyadh.

In summary, the document presents a comprehensive roadmap for the development of the gaming industry in Riyadh, focusing on regulatory partnerships, education, localization, and industry innovation. It also poses important questions about the potential and challenges of this endeavor, aiming to drive insightful discussions and strategic planning for the future of gaming in Saudi Arabia.

According to the study, nearly half of the people in Riyadh would prefer to have a government regulator like the Saudi Esports Federation, Monshaat, or MCIT to set up the industry's infrastructure, plan investments, form joint ventures with foreign businesses and academic institutions like US or China, and manage strong relationships with foreign businesses to send Saudis abroad for partnerships or secondments as academics or other stakeholders. Additionally, it was said that to develop the young Saudis, King Abdulaziz and his friends' foundation for giftedness and creativity should concentrate on school students only. Conversely, there was only a 16% disagreement rate with the King Abdulaziz Foundation. There are differences in the percentages of people who comprehend this aspect of the requirements of Vision 2030 (38% don't know, 31% agree, In this regard, there are differences in the percentages of people who comprehend the criteria of Vision 2030 (38% don't know, 31% agree, and 26.7% strongly agree). 87% of respondents think that educational institutions under the Ministry of Education should create gaming studies and teach them to set the precedent and that Riyadh's school systems ought to incorporate gaming-related topics into the curriculum. A concerning percentage of 26.7% disagree that businesses have a defined plan before they begin operations, while 45% of respondents concur that a clear strategy exists. While 80% strongly agree that the majority of successful Saudi gamers didn't study gaming and instead followed their passion, there was no disagreement percentage of 40.2% strongly disagreeing that the majority of educated and accomplished gamers are educated and have studied gaming. Neutrals made up the remainder. Regardless of their educational background, most Saudi gamers use self-learning to acquire the necessary skill set (33.3% agree, 5.3% disagree). Successful Saudi gaming examples have been created and developed by Saudis. 18.3% agree, 11.7% disagree, 13.3% strongly agree, and the remaining group doesn't know. Of those who know about Saudi-produced games, 35% are aware of them, while 65% are not. Furthermore, 28 out of 60 respondents cited 31 examples of Saudi-produced

games in the study. 40% of respondents agreed that game design takes at least six months and has the potential to be successful and profitable, while 11.7% disagreed. 67% of respondents firmly concur that mobile games are currently the most lucrative genre of gaming. 57% of respondents concur that mobile gaming in general comprises midcore, strategic, casual, and hyper-casual game categories. 86% strongly think that e-sports might boost local production and improve the gaming sector in Riyadh, Saudi Arabia. Games must be localized. For localization to accurately represent the design, native nationality is necessary. 81% strongly felt that Arabic versions of Western games could be localized. In Saudi Arabia, 57.3% of gamers identify as an emerging archetype of the gaming culture. Most of the responses endorsed positioning Riyadh, Saudi Arabia as the game's center and the future hub of MENA gamification, emphasizing creativity and innovation and offering some useful advice on how to effectively meet the goals of the 2030 vision.

Conclusion: The research provided insight into how gaming is developing in Riyadh, Saudi Arabia. Analyze and debate the government's plan and the requirements of Vision 2030. The study focused on a crucial issue since prior research had not addressed how to set up the infrastructure and ecosystem to open doors for Saudi gamers and other stakeholders in accordance with Vision 2030. Everyone involved agreed that a government regulator was necessary to help build the foundation and infrastructure and to offer rules, regulations, and processes. Additionally, a committee under the Saudi National Esports Federation ought to be established to include other stakeholders including MCIT, Monshaat, and significant business sectors to strive toward completing the requirements to clear the path for building the basis and necessary infrastructure. A study curriculum that is tailored to each educational phase should be created by the government regulator in collaboration with the Ministry of Education and educational establishments to promote and encourage involvement and inclusivity, emphasis should be placed on creativity and innovation as well as the creation of a clear patent act or legislation, To guarantee and promote the success rate of the projects and agreed-upon outcomes from the partnerships, government funds and subsidies must have clear milestones and criteria, such as Saudization % for leadership posts with all beneficiaries, To guarantee that successful experiences are had by all Saudis, efforts should be made to raise awareness and gaudiness, not merely to supply funds. Lastly, internship programs must to be improved, expanded and monitored by a committee.

Keywords: Effect, Ecosystem, games, Infrastructure, Centre of the Game & HUB, Revolutionize, Riyadh, Saudi Arabia

المستخلص :

الهدف: يهدف هذا البحث إلى استكشاف وتحديد إمكانيات واستراتيجيات إحداث ثورة في صناعة الألعاب في الرياض، المملكة العربية السعودية، وتحديد آثارها على اللاعبين السعوديين. نظرًا لتعقيد هذه المهمة، فمن الصعب التنبؤ بالآراء المحتملة الإيجابية والسلبية والناجحة وتأكيداتها الإيجابية بطريقة تتوافق مع رؤية 2030 لإنشاء نظام بيئي قوي.

طريقة البحث والدراسة: تم إرسال استبيان دراسة مقطعية وثلاثة أسئلة مفتوحة إلى 130 فردًا، ولم يتم تلقي ردود إلا من 60 فردًا تتراوح أعمارهم بين 16-55 عامًا وما فوق باستخدام

استبيان على الإنترنت ونموذج ثلاثة أسئلة مفتوحة. بحثت الدراسة في آثار إحداث ثورة في صناعة الألعاب على اللاعبين السعوديين والمواءمة مع رؤية 2030.

نتائج:

تحدد الوثيقة استراتيجية شاملة لتطوير صناعة الألعاب ودمج الألعاب في النظام التعليمي في الرياض، المملكة العربية السعودية. يؤكد القسم الأول على الحاجة إلى جهة تنظيمية حكومية لتسهيل الشراكات مع المعاهد التعليمية الغربية المعروفة في مجال الألعاب، واستثمارات المشاريع المشتركة، وبرنامج إعاره المواهب السعودية مع الشركات العالمية. كما يسلط الضوء على أهمية إدراج مواد الألعاب في المناهج الدراسية لمختلف المراحل التعليمية وإنشاء حاضنات الألعاب لطلبة المدارس. علاوة على ذلك، تؤكد الوثيقة على أهمية تنظيم التمويل الحكومي، والشراكة بين الجهات الحكومية، واستراتيجية واضحة لشركات الألعاب السعودية الناشئة.

وفي القسم التالي، ينتقل التركيز إلى أهمية تعليم اللاعبين السعوديين، والتعلم الذاتي، وإتقان مجموعات المهارات المطلوبة. كما يذكر أمثلة الألعاب السعودية الناجحة والوقت اللازم لتصميم اللعبة، بالإضافة إلى ربحية وتوافق ألعاب وحدة التحكم والهواتف المحمولة. كما يتم تسليط الضوء على إمكانات الرياضة الإلكترونية لتعزيز صناعة الألعاب وأهمية التوطين في تصميم الألعاب وإنتاجها.

للمضي قدماً، تناقش الوثيقة أهمية الترجمة في الألعاب، لا سيما في عكس الثقافة والجنسيات المحددة، وإمكانية ترجمة الألعاب الغربية إلى الإصدارات العربية. كما يؤكد أيضاً على أهمية دمج اللهجات السعودية/المتعددة اللهجات في الألعاب وثقافة النماذج الأصلية الفريدة التي يقدمها اللاعبون السعوديون.

أخيراً، تثير الوثيقة أسئلة مثيرة للتفكير حول ترسيخ الرياض كمركز عالمي للألعاب في منطقة الشرق الأوسط وشمال أفريقيا، ودمج الألعاب بنجاح في النظام التعليمي في المملكة العربية السعودية، وإمكانية التعاون مع المؤسسات التعليمية، والحاجة إلى الابتكار والإبداع في صناعة الألعاب، و قدرة السعوديين على تطوير النظام البيئي للألعاب والبنية التحتية في الرياض.

باختصار، تقدم الوثيقة خارطة طريق شاملة لتطوير صناعة الألعاب في الرياض، مع التركيز على الشراكات التنظيمية والتعليم والتوطين والابتكار في الصناعة. كما أنه يطرح أسئلة مهمة حول إمكانات هذا المسعى وتحدياته، بهدف تحفيز المناقشات الثقافية والتخطيط الاستراتيجي لمستقبل الألعاب في المملكة العربية السعودية.

ووفقاً للدراسة، فإن ما يقرب من نصف سكان الرياض يفضلون وجود جهة تنظيمية حكومية مثل الاتحاد السعودي للرياضات الإلكترونية، أو منشآت، أو وزارة الاتصالات وتكنولوجيا المعلومات لإنشاء البنية التحتية للصناعة، والتخطيط للاستثمارات، وتشكيل مشاريع مشتركة مع الشركات الأجنبية والمؤسسات الأكاديمية مثل الولايات المتحدة. أو الصين، وإدارة علاقات قوية مع الشركات الأجنبية لإرسال السعوديين إلى الخارج لشراكات أو إعاره كأكاديميين أو أصحاب مصلحة آخرين. بالإضافة إلى ذلك، قيل إنه لتنمية الشباب السعودي، يجب أن تركز مؤسسة الملك عبد العزيز ورجالة للموهبة والإبداع على طلاب المدارس فقط. وعلى العكس من ذلك، كانت نسبة الخلاف مع مؤسسة الملك عبد العزيز 16% فقط. هناك اختلافات في نسب الأشخاص الذين استوعبوا هذا الجانب من متطلبات رؤية 2030 (38% لا يعرفون، 31% موافقون، وفي هذا الصدد هناك اختلافات في نسب الأشخاص الذين استوعبوا معايير رؤية 2030) 38% لا يعرفون، 31% موافقون، 26.7% موافقون بشدة). 87% من المشاركين يعتقدون أن المؤسسات التعليمية التابعة لوزارة التعليم يجب أن تنشئ دراسات حول الألعاب وتعليمهم كيفية إرساء سابقة وأن الأنظمة المدرسية في الرياض يجب أن تدمج المواضيع المتعلقة بالألعاب في المنهج الدراسي. لا توافق نسبة 26.7% من المشاركين على أن الشركات لديها خطة محددة قبل أن تبدأ عملياتها، في حين يتفق 45% من المشاركين على وجود استراتيجية واضحة. بينما يوافق 80% بشدة على أن غالبية اللاعبين السعوديين الناجحين لم يدرسوا الألعاب واتباعوا شغفهم بدلاً من ذلك، ولم تكن هناك نسبة خلاف بلغت 40.2% لا أوافق بشدة على أن غالبية اللاعبين المتعلمين والمتميزين هم متعلمون وقد درسوا الألعاب. وشكل المحايدين الباقي. وبغض النظر عن خلفيتهم التعليمية، يستخدم معظم اللاعبين السعوديين التعلم الذاتي لاكتساب مجموعة المهارات اللازمة (33.3% موافقون، 5.3% غير موافقين). تم إنشاء وتطوير أمثلة الألعاب السعودية الناجحة على يد سعوديين. 18.3% موافقون، 11.7% غير موافقين، 13.3% موافقون بشدة، والبقية لا يعرفون. ومن بين الذين يعرفون عن الألعاب المنتجة في السعودية، 35% على علم بها، في حين أن 65% لا يعرفونها.

علاوة على ذلك، ذكر 28 من أصل 60 مشاركاً 31 نموذجاً للألعاب المنتجة في السعودية في الدراسة. وافق 40% من المشاركين على أن تصميم الألعاب يستغرق ستة أشهر على الأقل ولديه القدرة على أن يكون ناجحاً ومربحاً، بينما اختلف 11.7%. ويتفق 67% من المشاركين بشدة على أن ألعاب الهاتف المحمول هي حالياً أكثر أنواع الألعاب ربحاً. يتفق 57% من المشاركين على أن ألعاب الهاتف المحمول بشكل عام تشتمل على فئات الألعاب المتوسطة والاستراتيجية والعادية والألعاب غير الرسمية. 86% يعتقدون بقوة أن الرياضات الإلكترونية قد تعزز الإنتاج المحلي وتحسن قطاع الألعاب في الرياض، المملكة العربية السعودية. يجب أن تكون الألعاب مترجمة. لكي تمثل الترجمة التصميم بدقة، تعد الجنسية الأصلية ضرورية. 81% شعروا بقوة أنه يمكن ترجمة الإصدارات العربية من الألعاب الغربية. في المملكة العربية السعودية، يعتبر 57.3% من اللاعبين نموذجاً ناشئاً لثقافة الألعاب. أيدت معظم الردود وضع مدينة الرياض بالمملكة العربية السعودية كمركز للعبة ومركز مستقبل للألعاب في منطقة الشرق الأوسط وشمال أفريقيا، مع التركيز على الإبداع والابتكار وتقديم بعض النصائح المفيدة حول كيفية تحقيق أهداف رؤية 2030 بشكل فعال.

الاستنتاج: قدم البحث نظرة ثاقبة حول كيفية تطور الألعاب في الرياض، المملكة العربية السعودية. تحليل ومناقشة خطة الحكومة

ومتطلبات رؤية 2030. ركزت الدراسة على قضية حاسمة لأن الأبحاث السابقة لم تتناول كيفية إعداد البنية التحتية والنظام البيئي لفتح الأبواب أمام اللاعبين السعوديين وأصحاب المصلحة الآخرين وفقاً لرؤية 2030. الجميع اتفق المشاركون على أن وجود هيئة تنظيمية

حكومية ضروري للمساعدة في بناء الأساس والبنية التحتية وتقديم القواعد واللوائح والعمليات. بالإضافة إلى ذلك، يجب إنشاء لجنة تابعة للاتحاد الوطني السعودي للرياضات الإلكترونية لتضم أصحاب المصلحة الآخرين بما في ذلك وزارة الاتصالات وتكنولوجيا المعلومات ومنشآت وقطاعات الأعمال المهمة للسعي نحو استكمال المتطلبات لتمهيد الطريق لبناء الأساس والبنية التحتية اللازمة.

يجب إنشاء منهج دراسي مصمم خصيصًا لكل مرحلة تعليمية من قبل الجهة التنظيمية الحكومية بالتعاون مع وزارة التربية والتعليم والمؤسسات التعليمية لتعزيز وتشجيع المشاركة والشمولية، ويجب التركيز على الإبداع والابتكار بالإضافة إلى إنشاء نظام دراسي مصمم خصيصًا لكل مرحلة تعليمية. قانون أو تشريع واضح لبراءات الاختراع، لضمان وتعزيز معدل نجاح المشاريع والنتائج المتفق عليها من الشراكات، يجب أن يكون للصناديق والإعانات الحكومية معالم ومعايير واضحة، مثل نسبة السعودة للمناصب القيادية مع جميع المستفيدين، لضمان ذلك تجارب ناجحة يمر بها كل السعوديين، ويجب بذل الجهود للتوعية والبهجة، وليس مجرد توفير الأموال. وأخيرًا، يجب تحسين برامج التدريب الداخلي وتوسيع نطاقها ومراقبتها من قبل لجنة.

الكلمات المفتاحية: التأثير، النظام البيئي، الألعاب، البنية التحتية، مركز اللعبة ومركزها، الثورة، الرياض، المملكة العربية السعودية.

Study Variables

Dependent Variable: Potential effects & Revolutionize

Independent Variable: Gaming Industry, Saudi Gamers, and Vision 2030

Electronic games market in Saudi Arabia: rapid growth and promising potential

(Musa Al-Ashari,2024)

The electronic gaming market in Saudi Arabia is witnessing rapid growth, reaching 3.75 billion Saudi riyals (one billion US dollars) in 2023, and it is expected to reach 10 billion Saudi riyals (2.7 billion US dollars) by 2026. This growth is due to several factors. , Of which:

The spread of the Internet, computers, and smartphones, as 87% of Saudis own a mobile device, and 80% of them use the Internet.

The cost of electronic games has decreased, as electronic games have become more accessible.

The development of electronic gaming technologies, making them more realistic and exciting.

According to a study conducted by Statista, the number of gamers in Saudi Arabia reached 21 million players in 2023, and this number is expected to reach 28 million players in 2026. Among the most prominent electronic games are , Popularity in Saudi Arabia: PUBG Mobile game, Fortnite game

Call of Duty: Mobile game , FIFA Mobile game, Minecraft game.

The Saudi government supports the growth of the electronic gaming sector, as it launched in 2022 the “Electronic Games Sector Development Strategy,” which aims to make Saudi Arabia a global gaming center.

The Saudi government supports the growth of the electronic games sector, as it launched in 2022 the “Electronic Games Sector Development Strategy,” which aims to make Saudi Arabia a global center for electronic games. The strategy includes several initiatives, including:

Establishing a specialized body to regulate and develop the electronic games sector.

Providing financial and logistical support to electronic gaming companies.

Organizing electronic sports competitions and events.

This strategy is expected to contribute to enhancing the growth of the electronic gaming sector in Saudi Arabia and creating new job opportunities in this sector.

Future trends of the electronic games market in Saudi Arabia

The electronic gaming market in Saudi Arabia is expected to continue to grow in the coming years, with the continued spread of the Internet, computers and smartphones, and the development of electronic gaming technologies. Among the most prominent trends witnessed in the electronic games market in Saudi Arabia are:

The increasing popularity of online gaming, as players now prefer to play online with other players from all over the world.

The growth in popularity of mobile gaming, as smartphones and tablets become more powerful and capable of running complex games.

The development of virtual reality and augmented reality games, as these games provide a more realistic and adventurous gaming experience.

Saudi companies can benefit from these trends by developing new and innovative games that meet the needs of Saudi players.

Summary of past papers and similar studies:

Because the study's topic is narrowly focused, new and fresh; consequently, it bears some similarities to other studies on a variety of topics, including gaming in 29 different countries around the world, localizing the significance and difficulties and necessary steps for applying best localization, gaming in Arab culture and the representation of Arab gamers and alignment with customized culture, effects on schoolchildren's behavior, violence, and sleeping patterns, and, lastly, The impact that virtual reality games have on players' vestibular systems and Eye in Riyadh, Saudi Arabia. Here are some citations of those studies.

LOCALIZATION OF GAMES: The Case of Romhacking: Video Game Localization for Fans by Fans

This study aims to demonstrate the specifics of a methodology known as "romhacking."

created by amateurs with the primary goal of localizing classic video games. In the introductory portion, the idea and the term "romhacking"'s genesis are discussed. The subsequent segment provides a synopsis of the process romhackers use to translate video games into other languages. The third section includes a breakdown of There is a comparison between amateur and professional translations. The fourth segment incorporates a discussion of this practice's legal implications. The paper ends with a contemplation. on how the video game localization industry is affected by amateur translations.

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Global Video Game Play

When the history of video games is recounted, it usually focuses on American video games with a smattering of Japanese and European video game history. However, this is just a portion

of the entire narrative, and with articles on video games from 35 various nations and regions—representing every inhabited continent—Video Games Around the World is the first book to attempt fully worldwide coverage of the subject. The majority of the pieces are authored by academics who are native to the places covered. The essays cover the history of video games in the respective areas, but they also touch on issues significant to the authors' native cultures and how those cultures influence video games. Analyzing as a group the various ways that video games engage society and the institutions of government and education. With a tone and style appropriate for an undergraduate audience, Video Games Around the World fills a niche in game studies as well as other areas of cultural studies and technology studies, and has no competitors because no other book on video games has such a broad, international scope. At the same time, the book has the potential to reach a worldwide audience.

(The book's editor, Dr. Mark J. P. Wolf, is a Professor in the Communication Department at Concordia University Wisconsin)

Prominent academics including Edward Said (1978), Shaheen (2000), Karim (2005), and others have written extensively about Arab representation in the media. These works have examined journalism, cinema, television, and ancient literature. The medium of video games is a more recent addition to the research on Arab representation. Reichmuth and Werning (2006) and Machin and Suleiman (2006) looked at this first, and numerous other publications that are covered in this thesis have expanded on it. The overwhelming majority of research on Arab representation in video games concentrates on Western games and how Arab developers responded to these depictions. Another trait of this field is its lack of specificity. Both traits are evident in repeated comparative analyses, in which researchers choose one. Another trait of this field is its lack of specificity. Both traits are evident in the frequent comparative research that is conducted when academics choose one local culture as an archetype and then compare it to the entire gaming community.

Saudi-Arab Emerging Video Game Cultures, Archetypes, Narratives, and User Experiences

(Omar AbdulAziz S. AlKhamees)

The prevalence of video games and their detrimental effects on children and adolescents in Albaha, Saudi Arabia

Nowadays, youngsters spend the majority of their free time playing video games (VGs), which may

negatively impact their behavior, sleeping patterns, and education. Methods: This prospective, cross-sectional study was conducted to analyze the frequency and detrimental effects of video games on kids and teenagers. A survey was created and completed by the

Parents should evaluate their child's use of virtual reality games and whether it has had any detrimental effects on them. Findings:

Approximately 99.3% of the subjects had VGs. Playing video games has been shown to increase the risk of the following side effects:

violence and aggressive conduct (25%), overindulgence in food (37%), and behavioral

Elfatih Mirghani M. Salih¹, Ahmed Hassan Alghamdi², Ali Yahya B. Alzahrani³,
Hamid A.H. Alghamdi³, Fahad A. Saad Alghamdi³, Abdulaziz Saleh M Alzubaidy³

¹Assistant professor of pediatrics University of Albaha, KSA

²Associate professor of pediatrics and Endocrinology University of Albaha, KSA

³Six-year medical students Faculty of Medicine Albaha University, KSA

Effects of Playing Violent Video Games on Children in School, Saudi Arabia

Salman Khalil, Farzana Alim, Farheen Sultana, Khursheed Muzammil, Nazim Nasir, Atiq ul Hassan, and Syed Esam Mahmood are the first seven names.

The influence of violent video games on children's daily lives may make it difficult for them to integrate into society at large. Playing violent video games differs greatly from playing other kinds of games, and these violent games are bad for kids since they might make them more aggressive in addition to other negative effects.

It becomes challenging for them to distinguish between real-life violence and imaginary violence. Repetition and praise can also be very important for a child's growth because they can encourage. Since praise and repetition have the potential to encourage aggressive conduct, they can also have a big impact on a child's growth. It has been stated that boys who play violent video games perform worse academically than girls.

The impact that virtual reality games have on players' vestibular systems and Eye in Riyadh, Saudi Arabia

Mohammed Saad Alkhalidi¹, Ishama Marium¹, Arwa Mushabbab Alamri^{1*}
Lamees Mohammed¹, Talal M. Abukaram¹, and Fatimah Yousef Al-Humaily
Algubran¹, Nora Jasim Alturki³, Sahar Mushabbab Alamri², and Refah Saud
Wala Saleh Alshiha⁵, Alotaibi⁴,

The purpose of this study was to investigate how virtual reality (VR) games affect the vestibular system and eyes. system, emphasizing among other things balance, direction, incidence of motion sickness, and general visual health VR users in Riyadh.

Methods: 387 people ages 8 to 40 and older participated in a cross-sectional study that was carried out utilizing

an online survey. The study looked into how VR gaming affected participants' orientation, balance, and eyesight.

as well as motion sickness. demographic factors, use of VR headsets, and length of virtual reality games were also investigated.

The research showed that 68% of people in Riyadh between the ages of 20 and 30 were VR gamers. A roughly equal distribution of the genders. 78.3% of participants were native Saudis, who provided cultural perceptions. Roughly 56.3% of participants played video games with VR headsets. Different user experiences were found, with 45.2% recently embracing virtual reality gaming. A significant percentage (55.8%) thought that virtual reality games impacted balance or vision. Of the players, 24.5% had motion sickness, including headaches and tinnitus were, respectively, reported by 27.1% and 29.2%.

Substantial Figures and Forward-looking:

Exciting investment opportunities in sectors such as entertainment, media, and esports are emerging in the MENA region due to a growing youth population and social reforms:

- MENA is home to 15% of gamers, and revenue in the region is expected to increase by over 20% by 2024.
- The media and entertainment industry is also booming, with a projected growth from \$39 billion in 2023 to \$61 billion in 2028.

The Saudi National Gaming and Esports Strategy

Saudi Arabia is leading the way in the region with its National Gaming and Esports Strategy

The investment plan aims to position KSA as a global leader in 2030 by fulfilling 4 main goals:

- To become the #1 event host by organizing and hosting the most viewed esports events in the world.
- Establish 250 Gaming companies to create over 39000 jobs in development, publishing, and infrastructure.

- Be in the top 3 for # of Esports athletes per capita.
- +30 games by KSA-based studios to reach the Top 300 during the next 10 years, starting 2021.

https://nges.sa/static/media/NGES_Strategy_En.ddf4b1e3bf1f91d6a71a.pdf

What is the National Gaming & Esports Strategy? Value Proposition The National Gaming and Esports Strategy is a comprehensive investment to develop the entire gaming and esports value chain. It is driven by the passion of gamers Everyone is invited to play, in a strategy that fosters new career and business opportunities and will make Saudi Arabia the center of the game by 2030.

What is Saudi Arabia doing through this strategy? levelling up the sector Inviting Everyone to play Unlocking exciting career opportunities Create diverse economic opportunities through gaming & esports Saudi Arabia is shaping the future of the sector Become a global hub of gaming & esports

Vision Statement different & complementary areas that make up the value chain and twenty-six (26) strategic plays making up 86 initiatives that will be executed by 20 different entities What areas of the value chain does the strategy cover? The strategy identifies eight Game production Esports Aspirations Create an Eden for game developers & produce legendary titles Strategic Plays– (How will we achieve the ambitions) - Attract, localize and develop global AAA developers and publishing powerhouses - Develop the games production start-up ecosystem for (mobile) indie games and local IP - Foster production of games promoting Saudi and Arabic culture Aspirations We aim to make KSA the pinnacle of esports and host legendary tournaments that unlock the true potential of esports Strategic Plays– (How will we achieve the ambitions) - Become the World hub for esports events, organizing the biggest events in the world - Create, facilitate and export esports event IP - Develop grassroots ecosystem to pave the way for local talents and enable them to become Legends - Take a bigger role in the international esports federations to ensure KSA seat at the table Tech development & hardware Aspirations Achieve technological leapfrog by becoming the world testbed for Game-tech innovation Strategic Plays– (How will we achieve the ambitions) - Play a role in the Cloud / edge Gaming sector - Lead the immersive sport-related & immersive gaming market - Become a lab & testbed for forward-looking gaming-related innovation Initiatives value chain elements Initiatives Consumption-driven adjacencies Funding and financial support Technical & physical infrastructure Aspirations Develop an innovative and attractive way of consuming games, infused with regional themes, aesthetics, and stories for Saudis and global visitors Strategic Plays– (How will we achieve the ambitions) - Bring global and local gaming community together through venues and events - Become the streaming center of the Arab-speaking world - Acquire, develop and Infuse gaming IP into all aspects of pop culture - Create a blended reality experience

Not just a man's game... How games have become more accessible and open to female gamers

Co-founder and CEO of GameTree Dana Sydorenko talks toxicity in games, the challenges faced by female gamers and how we can make a more accessible gaming community

(March 11th, 2024)

The video games market and its communities often still fall into the false idea that women aren't playing video games. This results in many games being created with only men in mind and environments that can feel unwelcoming to female gamers. But with billions of women gaming worldwide and many working within the industry, it's important that we change this narrative and create environments in which everyone feels welcomed.

Here, GameTree CEO and co-founder, Dana Sydorenko discusses toxicity in gaming and stereotypes. Sydorenko also speaks out on how studios can help create a better future for the gaming industry and how to battle the gender imbalance.

Females comprise 46% of the 3.2 billion gamers worldwide. However, their representation remains limited, with a study of the top fourteen global gaming companies revealing that men hold 84% of executive positions in the gaming industry.

Our mission is to shed light on the journeys of female gamers, challenge the status quo, and navigate the persistent sexism that exists within gaming communities.

<https://www.pocketgamer.biz/comment-and-opinion/83588/not-just-a-mans-game-how-games-have-become-more-accessible-and-open-to-female-gamers/>

Chapter 3:

MATERIALS AND METHODS

Methods: A cross-sectional study questionnaire and three opened questions, was sent to 130 individuals, only received responses from 60 individuals aged 16-55 years and beyond was conducted using

an internet-based questionnaire and three opened questions form. The study investigated the effects of revolutionizing the gaming industry on Saudi Gamers and alignment with vision 2030

This prospective cross-sectional, community-based study was performed during the period from March 2024 to April 2024 to Estimate, discover, and find out and identify the possibilities and strategies for revolutionizing the gaming industry in Riyadh, KSA, and to determine its effects on Saudi gamers. Due to the complexity of this task, it is difficult to predict, confirm, and answer the possible positive, negative, and successful views in a way that aligns with Vision 2030.

The study was conducted in The Riyadh Province (ar-Riyāḍ), also known as the Riyadh Region, is a province of Saudi Arabia, located in the geographic center of the country and the center of the Arabian Peninsula. It has an area of 404,240 km² (156,080 sq mi) and with a 2022 population of 8,591,748, it is the second-largest region by area, behind the Eastern Province and the largest by population. The capital governorate of the province is the Riyadh Governorate and it is named after the capital of the kingdom, Riyadh, which is the most populous city in the region and kingdom, with a little less than two-thirds of the population of the region residing within the city. The province was governed for nearly five decades by Prince Salman bin Abdulaziz from 1963 to 2011 shortly before he became the Crown Prince in 2012. Currently, it is governed by Prince Faisal bin Bandar. (Wikipedia, Riyadh.gov.sa)

Performed under the supervision of the College of Management of Midocean University of Sharjah, UAE, the rest of the data was

Collected from a questionnaire that was answered by different populations inside Riyadh, both Saudis and expiates, others who came to Riyadh for businesses or have investments from abroad., open questions, and some reports were done by previous researchers who tried to talk about the same subject but with different focus variables.

questionnaire fulfilling the following points:

1. Sociodemographic data.
2. Common understanding of the trends and strategy.
3. Needs for governmental regulation and establishing the base.
4. The way of how to develop and design an academic curriculum
5. Strategies to identify Talents, grooming and fostering them
6. Development of gaming ecosystem.
7. Female leadership development in Technology and Gaming
8. Joint ventures, partnerships, and secondments.
9. Utilizing reports findings and transferring them to achievable milestones.
10. Investments and increasing revenue strategies.
11. A comprehensive roadmap for developing the gaming industry in Riyadh as a MENA and Global Hub.

Analytical Methods

Data were analyzed using the Google form, excel sheet, PDF, and Statistical Package for the Social Sciences (SPSS) program, version 25, data were considered to be

statistically significant when $P\text{-value} \leq 0.05$.

Ethical considerations

1. Informed consent was taken from the participants.
2. Ensure the privacy of the participants and use the data only for research legally and ethically.
3. Ensure confidentiality and data protection.

Chapter 4:

The questionnaire was really thorough because the topic is fresh and wanted to touch on vital points because gaming is becoming the most popular industry in Riyadh, Saudi Arabia. The questionnaire falls into three categories:

first-class highly disagree, disagree, neutral, agree, and highly agree on the Likert scale To measure ((Regulations, Building blocks, governments & private sectors cooperation) (Regulations, Building blocks, governments & private sectors cooperation) (Regulations, Building blocks, governments & private sectors cooperation) in this section, we divided the statements into 5 main statements.

Second category: Yes, No, includes examples of Saudi Arabian-produced games

The third category consists of three open-ended questions designed to elicit insightful responses from participants.

Discussion and Recommendation:

A survey was distributed to 140. 60 were responded as all details as follows

30% Female = 18.

70% Male = 42

Age

33.3% 15–30 years old = 20

31.7% Ages 31 to = 19

28.3% 39 40–49 years old = 17

6.7% 50 years of age or older = 4

Years of Work experience

Years of Experience: 0–5 30% = 18

25% 6–10 Years of Experience = 15

26.7% 11–20 Years of Experience = 16

18.3% 21–30 Years of Experience = 11

Background in Education

6.7% High school secondary = 4

58.3% Bachelor = 35

1.7% Higher Diploma = 1

26.7% Master = 16

6.7% PhD = 4

Section/First Part:

1- The gaming industry in Riyadh, Saudi Arabia, needs a governmental regulator to support and establish a robust ecosystem.

Strongly Agree 53.3% = 32, Agree 31.7% = 19, Neutral 15% = 9, Disagree = 0, Strongly Disagree = 0

2. Governmental regulators should invite well-known Western gamification educational institutes, such as those from the US or China, to open branches and operate in Saudi Arabia Riyadh, with exceptional facilities for 5 years.

Strongly Agree 41.7% = 25, Agree 41.7% = 25, Neutral 13.7% = 8, Disagree 3.3% = 2, Strongly Disagree = 0

3. Governmental regulators should make joint-venture investments with well-known Western gamification educational institutions, such as those from the US or China.

Strongly Agree 40% = 24, Agree 41% = 27, Neutral 11.7% = 7, Disagree 3.3% = 2 Strongly Disagree = 0

4. Both the Government regulators and Universities in Riyadh should send teachers in partnerships or apprenticeship programs to well-known Western/Asian countries to attach with peers out there.

Strongly Agree 45% = 27, Agree 46.7% = 28, Neutral 8.3% = 5, Disagree = 0 Strongly Disagree = 0

5. Government regulators and the private sector should go for secondment programs for Saudi talents with international companies and studios as secondees for 1–2 years. for hands-on practices.

Strongly Agree 50% = 30, Agree 45% = 27, Neutral 5% = 3, Disagree = 0, Strongly Disagree = 0

6. Governmental funding to stakeholders should be more regulated with clear milestones.

Strongly Agree 53.3% = 32, Agree 38.3% = 23, Neutral 8.3% = 5, Disagree = 0, Strongly Disagree = 0

7. Governmental subsidy and funding merit should achieve specific requirements by the stakeholders, e.g., the number of Saudis in the organization, both male and female, and the percentage representation of executives and critical roles.

Strongly Agree 41.7% = 25, Agree 33.7% = 20, Neutral Disagree 3.3% = 2, Strongly Disagree = 0

8. Governmental entities such as MCIT, Monshaat, Neom, and the E-Sport Federation should undergo a partnership memorandum to enhance the design and unified efforts to establish the ecosystem properly.

Strongly Agree 48.3% = 29, Agree 31.7% = 19, Neutral 20% = 12, Disagree = 0, Strongly Disagree = 0

9. King Abdulaziz and his companions' foundation for giftedness and creativity should accommodate a gaming incubator "accelerator" for school students only.

Strongly Agree 33.9% = 20, Agree 20% = 19, Neutral 16.7% = 10, Disagree 16.7% = 10, Strongly Disagree 3.3% = 2

10. Internships with well-known companies and studios in Riyadh are very beneficial and value-added effectively and efficiently.

Strongly Agree 41.7% = 25, Agree 46.7% = 28, Neutral 6.7% = 4, Disagree 5% = 3 Strongly Disagree = 0

11. Vision 2030's requirements regarding gaming are understood with deliverables.

Strongly Agree 26.7% = 16, Agree 21.7% = 19, Neutral 21.7% = 19, Disagree 8.3% = 5, Strongly Disagree = 0

12. People in Riyadh (Saudis and expats) are familiar with Vision 2030 milestones.

Strongly Agree23.3% =14, Agree35% = 21, Neutral28.3% =17, Disagree13.3= 8, Strongly Disagree=0

Section/part

1- Universities in Riyadh should design academic and educational criteria for gaming studies.

Strongly Agree46.7%=28, Agree41.7% =25, Neutral11.7% =7, Disagree= 0 Strongly Disagree =0

2- Various Saudi educational systems in Riyadh should include gaming subjects in the curriculum.

Strongly Agree38.3% =28, Agree43.3% =26,Neutral13.3% =8,Disagree3.3% =2, Strongly Disagree1.7% =1

3- Schools should have a stream of vocational, innovation, and creativity activities in the curriculum, including gaming subjects at educational levels such as elementary and secondary-high schools for both genders.

Strongly Agree50% =30, Agree35% =20, Neutral11.7% =7, Disagree1.7% =1, Strongly Disagree 1.7%=1

4- All of Riyadh's universities should develop a games curriculum in the first phase, then share implementation kingdom-wide if it is successful.

Strongly Agree33.3% =20, Agree35% =21, Neutral25% =15, Disagree5 =3, Strongly Disagree1.7% =1

5- Teaching game analysis is very important.

Strongly Agree41.7% =25, Agree41.7% =25, Neutral13.3% =8, Disagree1.7% =1 Strongly Disagree1.7%=1

Section/part3

1. Start-up Saudi gaming companies have a clear strategy before operating the business.

Strongly Agree=15% =9,Agree30% =19,Neutral21.7% =13, Disagree 26.7% =16, Strongly Disagree 6.7% =4

2- Start-up Saudi gaming companies have a clear plan for the first 3–5 years.

Strongly Agree13.3% = 8, Agree13.7% =19, Neutral25% =15, Disagree25% =15, Strongly Disagree5% =3

3- Most successful Saudi gamers are educated and have studied gaming.

Strongly Agree11.7% =7, Agree8.3% =5, Neutral38.3%= 28, Disagree 35% =21, Strongly Disagree 6.7% = 4

4- Most successful Saudi gamers didn't study gaming and followed their passion.

Strongly Agree30% =18, Agree 50% = 30, Neutral20% =12, Disagree = 0 Strongly Disagree=0

5- Most Saudi gamers apply self-learning and master the required skill set regardless of their studies.

Strongly Agree38% =20, Agree 33.3% = 20, Neutral Disagree23.3% =14, Strongly Disagree5% =3

6- There are successful Saudi game examples produced and developed by Saudis.

Strongly Agree13.3% =8, Agree18.3% = 11, Neutral53% = 32, Disagree11.7% =7, Strongly Disagree3.3 =2

7- Do you know a specific Saudi-produced game?

Yes35% =21 No 65% =39

Share examples of Saudi games that have been successful.

The is a lot of Bowling& Archery, forgot the name, one with a skeleton pirate Not Aware

Sticks and bones, made by a single Saudi developer Jawakar, King of steering & كملنا كملنا

Hajwala, Camel Run 3D, car drifting game

Kamlna, who catch camels, cards (ballot) Baidya

Sticks and bones, هجولة PKING OF STEERING, Last letter آخر حرف, basil, بربخا, Steer Games, Bahoot , fateel, Faz3a mobile game

Section/part5

1- Game design takes at least six months and could be successful and profitable.

Strongly Agree13.3% =8, Agree28.3% =17, Neutral43.3 % =26, Disagree11.7% =7, Strongly Disagree3.3% =2

2- Mobile games are the primary focus and trend nowadays

Strongly Agree31.7% =19, Agree 35% =21, Neutral20% =12, Disagree10% =6, Strongly Disagree3.3% =2

3- Mobile games are more profitable than console games.

Strongly Agree18.3%=11, Agree31.7% =19, Neutral 26.7%=16, Disagree11.3%=11, Strongly Disagree5%=3

4-Mobile games overall consist of casual, hyper-casual, midcore, and strategy types.

Strongly Agree21.7% =13, Agree36.7 % = 22, Neutral35% =21, Disagree6.7% =4, Strongly Disagree=0

5- E-sports could enhance and contribute to the games industry in Riyadh, KSA, and increase local production.

Strongly Agree38.3% = 23, Agree43.3% = 26, Neutral15% =9 , Disagree1.7% =1, Strongly Disagree1.7% =1

6- Great game design takes 3 or 5 years.

Strongly Agree20% = 13, Agree25%=15, Neutral36.7% =22, Disagree13.3%=8, Strongly Disagree 5% =3

7- Localization is important in game design and production and increases sales with a high retention rate.

Strongly Agree30% =18, 2- Agree50% =30, Neutral15%=9, Disagree5% =3, Strongly Disagree=0

8- Localization requires native nationality to reflect the design properly.

Strongly Agree 35% = 21, Agree 46.7% = 28, Neutral 15% = 9, Disagree 3.3% = 2, Strongly Disagree = 0

9- It's essential to localize the culture for games.

Strongly Agree 38.3% = 23, Agree 43.3% = 26, Neutral 15% = 9, Disagree 3.3% = 2, Strongly Disagree = 0

10- Most localized games fail if not done by an expert and someone familiar with the area and culture.

Strongly Agree 26.7% = 16, Agree 48.3% = 29, Neutral 20% = 12, Disagree 5% = 3, Strongly Disagree = 0

11- Western games can be localized into an Arabic version.

Strongly Agree 18.3% = 11, Agree 65.7% = 34, Neutral 20% = 12, Disagree 5% = 3, Strongly Disagree = 0

12- Saudi gamers present themselves as a hyperlinked culture from Western culture.

Strongly Agree 10% = 6, Agree 30% = 18, Neutral 51.7% = 31, Disagree 5% = 3, Strongly Disagree 3.3% = 2

13- Gamers in Saudi Arabia present themselves as an emerging archetype of gaming culture.

Strongly Agree 15% = 9, Agree 43.3% = 26, Neutral 41.7% = 25, Disagree = 0, Strongly Disagree = 0

What is your opinion about establishing Riyadh as a gaming MENA and global HUB? Why? How?

Good, Great idea due to the high supply and sufficient demand. Needs a holistic view and efforts between all stakeholders, increasing local talent, It's the right time to establish. And has so much potential now that the gaming industry is striving in the Mena region. It's going to be very competitive. Better to start establishing now that it's blooming, it's possible considering the efforts and support given by the government. Saudi will be the leader in MENA, in addition to the available resources. It would be great, To Saudi Arabia, get to know it closely, and see the work being done directly. As described those who do not see Saudi sports work and the desire to develop and advance football and sports in general, without high-quality products made by a Saudi Game Studio, all these funds will be diverted to outside. Vision 2030, in Alignment with VISION 2030, Govt. Heavy Investments in IT, AI, Also Riyadh city is being invested heavily to become a global city in the future, this enables the city to host and facilitate millions of talented people from across the globe, with the additional Govt. Support in building good and business policies for doing business, a lot of big companies are setting up offices in Riyadh, Local Talent is attracted to Riyadh City considering latest developments, attractions. With more than 60% of Saudi Nationals as youth, there's going to be more attraction towards the Gaming Industry. I strongly believe Riyadh is strategically poised to be a potential global gaming hub, by bringing world-famous gaming companies to partner with local companies and also encouraging start-ups to develop Arab cultural games attracting not just national but regional populations, while protecting and supporting the Arab Culture and Heritage. Can also invest in specific education programs for Gaming enthusiasts. Great idea it will bring Saudi Arabia to the forefront in terms of gaming and entertainment plus development. The gaming culture in Saudi Arabia is already flourishing with talents as evidenced by Esports when our Saudi team won Overwatch tournaments, BUT when we speak about game development ITS another subject, Riyadh

needs to work on the game development fundamentals first within the educational systems to have a successful game development industry. Great for the future. Nothing interesting yet Riyadh is the perfect place to do the considering that it's the heart of Saudi. There's a lot of potential but also a lot of opportunities that were missed by the strict rules accompanying the 2023 Vision. I think there is no better option than this to establish Riyadh as a gaming MENA Riyadh certainly has the potential to be the hub for the gaming industry in the MENA region due to 3 reasons: 1- talented and young Saudi people 2- Saudi has biggest support for the industry than all other MENA region 3- government Support for programs & startups. No, not sure if that is a good investment. There is potential I think that Riyadh is the perfect choice as a gaming MENA. Because Riyadh nowadays is becoming more successful than any time before and it also opens a lot of experiences for Saudi people. Establishing Riyadh as a gaming hub in the Middle East and North Africa (MENA) region, and globally, could be a strategic move due to several reasons: Why? Large Gaming Population: Saudi Arabia has a large population of gamers, with 21 million gamers making up about 58% of the total population¹². High Smartphone and Internet Usage Rates: The country has high smartphone and internet usage rates, which are crucial for the gaming industry¹². Government Supports Rapid Growth in the MENA Gaming Market: The MENA gaming market is expected to grow 56% to \$2.79 billion by 2026 How? National Gaming and Esports Strategy: Saudi Arabia has developed a comprehensive strategy to become a global hub for gaming and esports by 2030. This strategy involves launching business incubators, new educational academies, and regulations intended to accelerate growth in the industry Investment in Global Gaming Market: Through its Public Investment Fund, the Saudi government has invested \$38 billion in the global gaming market¹. Hosting Global Gaming Events: The country hosts the world's largest esports and gaming event, I believe it will, if the public support is persistent enough. Great vision, challenging to achieve, but can still be done. The current capabilities in Saudi do not have the experience needed, which requires time and more people. How to fix it is by taking these talents and pushing them to studios worldwide to gain knowledge and bring expertise from outside Riyadh. This will be amazing. It's important to follow the global trends I have none to offer. Yes, Agree. There's big potential due to our region's growing investments in the industry, technological advancements, and huge percentage of people interested in gaming.

Saudi Arabi can be a hub for ME, yet it can never be a hub for MENA, as NA culture is extremely different, I'm fully supportive of Great because that supports Vision 30. Establishing Riyadh as a global and MENA HUB could leverage its strategic location, significant investment potential, and growing tech-savvy population. Riyadh has the potential to attract talent by offering incentives, offering a supportive ecosystem for startups, and hosting international gaming events. Great! To follow up with the global trend Not only Riyadh, Jeddah as well. An excellent step. I agree with it because it will create more jobs. Establishing Riyadh as a gaming hub, both regionally in the Middle East and North Africa (MENA) and globally, could be a promising endeavor for several reasons: Economic Opportunities, Cultural Impact, and Technology Development, We don't have hobbies. New hobbies can be cultivated as the city's population increases. With increased traffic congestion, people want to practice hobbies that relieve stress It's interesting to observe from outside. I want to visit Riyadh and meet game dev people.

I think Riyadh has the potential to become a gaming hub... Hover you need to research how eSports failed as an investment worldwide and is not a goal to run after. Understand that eSports is a marketing tool nothing more nothing less. Focus on making good games, that is the main source of income and a better investment. I think it's a good strategy, we need to have a place in the MENA region that helps talents generate high-quality games, we already have the talents but not the funds. Why not? Agree It is because of the success of Gamers8 2023 that Riyadh can become a hub for gaming It's going to happen with all the efforts being put into it is good since it is the capital, and it has a lot of potential since a lot of companies there are doing worldwide collaborations that never happened before. I am a computer

animation and visual effects graduate and want to see my country in the gaming industry to create jobs for people like myself. I think it is a great idea.

The Kingdom of Saudi Arabia occupies a strategic location for attracting various fields, like game development. Riyadh has witnessed revolutionary advancements in technology. This can be achieved by attracting many events related to game development, fostering growth in the field, and encouraging the existing communities in the region. 89% of Saudis are gamers so it's very important to establish Riyadh or Saudi Arabia as a gaming MENA and global HUB as well. Scale and customer base so there is not much to think about it. It is a rhetorical question whose answer is yes, It is a great approach to Saudi Arabia's right positioning in this fast-growing and dynamic market. Establishing Riyadh as a gaming hub in the MENA region and globally is an ambitious plan that leverages the fast-growing gaming industry and the region's young demographics. This initiative could diversify the economy away from oil, creating jobs in tech and creative fields. Realizing this vision would require developing tech infrastructure, supporting education and talent, setting a favorable regulatory framework, and enhancing international cooperation. Thus, Riyadh could become a pivotal point in the global gaming landscape.

Do you think that we need innovation or creativity in the games industry? Why? What is the difference?

Yes, yes, Yes, indeed. Motivating and encouraging generating ideas and keep thinking design. Innovation is about new ideas and not necessarily implementing them. Creativity is about utilizing current solutions and turning them into actual initiatives. In today's gaming ecosystem, we need innovation & creativity to be a successful game. Absolutely it's much needed to have innovation and creativity, especially with coming up with game ideas, game designs, art, and gaming core mechanics. It's already competitive. We need innovation to help with that. It's an ever-evolving industry. Innovation is the only way to stay in the market Of course, Saudi will game changer in this industry same as other industries. Yes, because gaming is a message for the gamers & something to learn from. Yes, The desire to develop and improve yes, game development is a creative job, just copying games does not me successful Creativity Yes, the Gaming industry needs to be more innovative and creative due to the latest advancements in Artificial Intelligence and Virtual Reality, games need to be more personalized and immersive for the audience. Generally, the new generation wants easy access and availability of games looking for instant gratification, this can be used by the gaming industry. Also, Gamification of learning and development both in schools and business environments gives a huge growth potential. Yes in order for people to spend time playing the game, it must contain a good property for kids to learn and achieve something.

Both, they are two faces of one coin. We need to make something original in the MENA to present our culture Innovation and creativity are the core of the gaming industry. Sure playing replicates could satisfy a smaller percentages, but if we want the gaming industry to grow we need to do something new and attract the attention of others to make Riyadh not only a local place known for the gaming industry but a global destination that also attracts foreigner talents to grow this industry in a faster phase.

Yes we need a proper team with marketing research Yes, but it's not necessary to have a profitable business as proven by numbers. Yes, most of the game creator do not create a good story, they copy a well know game and re do it so we can produce more successful games in the gaming industry. Yes, both innovation and creativity are crucial in the games industry. Here's why: Innovation refers to the introduction of new ideas, technologies, or methods. In the context of the gaming industry, innovation can mean developing new game mechanics, implementing cutting-edge technology like virtual reality, or creating unique monetization strategies. Innovation is necessary to keep the industry evolving and to meet the changing demands and expectations of players. It also helps companies differentiate themselves in a

competitive market. Creativity, on the other hand, is the ability to generate or recognize ideas, alternatives, or possibilities that may be useful in solving problems, communicating with others, and entertaining ourselves and others. In gaming, this could refer to the creation of compelling stories, engaging gameplay, and distinctive art styles. Creativity is what makes a game memorable and enjoyable, and it's what can turn a simple concept into a rich, immersive experience. While innovation and creativity are distinct concepts, they are closely intertwined. Creativity often drives innovation, and innovation can open up new avenues for creativity. In the gaming industry, the most successful games often result from a combination of both: creative ideas executed with innovative techniques. Yes, because gaming is a red ocean now, and you need to distinguish yourself there. Innovation in the games industry refers to the introduction of new ideas, methods, or technologies that significantly alter how games are made, played, or distributed. Creativity, on the other hand, is about originality and expressiveness within the games themselves. Both innovations, for example, are doing things in a new way through different technologies, methods, AI, etc. Creativity covers new gameplay concepts, mechanics, and ideas sometimes utilizing new technologies. Sure, innovation and creativity are essential in the games industry. yes, both are crucial. unique original ideas with attractive stories & quests, designing characters and worlds will help resonate with the players. innovating through subscriptions, technology (VR), or advertising is another approach as well. Of course! Both Yes, because the new generation likes games

Both are essential in the gaming industry. The innovation introduces new technologies or methods to improve how games are played. Creativity involves generating unique content, and stories, that engage players. So both are crucial for the growth of the industry, ensuring games are both cutting-edge and captivating.

It's already there but needs adoption and funding. I have no experience. Trends and young generation needs

We need both, game design is an art and a science, if you want to sustain a business in the gaming industry, you need to be creative in the produced content and innovative in the game-playing mechanism/system and innovate the business and monetization model Sure, so the game can sell by creating value "selling proposition" . innovation involves introducing new ideas, concepts, or technologies to improve existing products or create entirely new ones. In the games industry, innovation drives advancements in gameplay mechanics, graphics, user interfaces, and technology... Creativity is the ability to generate original ideas, concepts, or content that are both novel and valuable. In the games industry, creativity is essential for designing compelling narratives, memorable characters, unique art styles, and immersive worlds. Sure, We want to cultivate a new culture with games n/a

All need innovation and creativity :) Without creativity, there is no innovation. Sure, there are no groundbreaking achievements in games without innovation and creativity. As a game designer myself, it is my main goal to be creative. of course, cause in games there are already well-known games that have millions of players, if you want to succeed you need innovation so you can compete with these companies Yes. Towards more humanistic and social values reflecting games Yes, We have smart young people who are ready for education. Yes, both innovation and creativity are essential in the games industry. Innovation involves introducing new ideas, technologies, or methods that significantly change or improve existing games or create entirely new gaming experiences. Creativity, on the other hand, is the ability to generate unique and original ideas, designs, and concepts

Yes, the world of the game industry is a field where both Arab and Muslim developers should actively participate to protect the generations, build their values, and contribute standards that appreciate the Islamic and Arab communities. Additionally, the gaming industry aids in many other fields; it's a stronghold for gamification, user interfaces and user experiences. Moreover, it can serve as a powerful tool in education, as well as fostering and enhancing creativity

among individuals. Of course, you need to have creativity and innovation in games it is important in order for your game to be successful. 100 % agree, because of the long history of such industry, so it is not an emergent , and therefore, innovation will be the key success factor to fly correctly in this WARLD CLASS market space. . Both innovation and creativity are essential in the games industry. Creativity involves imagining new concepts, stories, and artistic elements, enriching the gaming experience with unique and engaging content. Innovation, on the other hand, focuses on introducing new technologies, gameplay mechanics, and business models, enhancing how games are developed, played, and distributed. While creativity breathes life into the content of games, innovation transforms the gaming experience, making it more immersive, accessible, and dynamic. The synergy of creativity and innovation drives the industry forward, constantly renewing the appeal of games to a diverse and expanding audience.

Do you think Saudis can develop a game ecosystem and infrastructure in Riyadh? Why? how

Yes, yes. 70% of Saudis both male and female have a great interest in gaming and government has a strategic desire to support it. All stakeholders should sit and discuss it properly with clear milestones and a teamwork plan. Yes, i believe they can they're just as passionate as others in the world. But they gave ideas that haven't been explored perhaps. With studying and analyzing and coming up with solid strategies then can make and establish successful companies. Yes, Saudis are competent enough to achieve everything. With some learning and guidance from the expert, they can make this happen. Absolutely. Yes, Saudi people could do anything if they have a goal to reach Yes The desire to develop and improve. possible, we need someone who studied video game development and worked in a video game company. we must allow them to take the leads. Riyadh is growing exponentially with investments and evident in real estate, infrastructure, internet connectivity, IT Data Centers, logistics, and transport, it's already bringing in companies from across the world to establish their regional offices, increasing the skilled local workforce entering the job markets gives another advantage for long term plans for companies, and well poised to be Regional Hub in the years to come, will play a crucial role in delivering the change that govt. is aspiring to bring as part of Vision 2030. All these factors complement game ecosystem and relevant infrastructure, Govt promoting Tourism and Entertainment with Riyadh being the center of attraction for driving these changes will further encourage setting up of ecosystem for Gaming Industry and can be a global hub competing with countries USA, China, Japan in the years to come. They can but it's a long road, long because the fundamentals aren't strong enough Game focus companies, or started can do it . It is possible but it will take time and more lenient rules to make the industry flourish and grow faster. Using local talents is great but the real knowledge and experience comes from foreigner knowledge and that needs to be acknowledged and used to improve the local telnets. If the focus turned into nurturing Saudi talent with, and specifically the talent that has proven work skills and have been successful then I would say definitely yes. Yes, I believe that we have a lot of stories in the history that we can reflect it as a game. Yes, Saudi Arabia, particularly Riyadh, has the potential to develop a robust game ecosystem and infrastructure. Here's why and how: Why? Large Gaming Population: Saudi Arabia has a large population of gamers, which provides a ready market for new games Government Support: The Saudi Arabian government is actively supporting the development of the gaming industry as part of its Vision 2030 Strategic Positioning: Saudi Arabia is strategically positioning itself as a global player in the growing \$300 billion video games and esports industry Young and Dynamic Population: The country has a young population How?

Investment: The Public Investment Fund (PIF) of Saudi Arabia has invested in the global gaming market Partnerships: The Saudi Esports Federation (SEF) has formed strategic partnerships to strengthen the gaming ecosystem Infrastructure Development: The country is working on developing the necessary infrastructure for the gaming industry. Yes, if they attract

enough experienced game makers to Riyadh to accelerate the process. it can be achieved but requires all the answers from 1, plus Riyadh has the business of Saudi so all related business and infrastructure is there. with government support, access to technology, and the right investment opportunities it's definitely possible! there's a huge growing interest in gaming. Yes, by setting a solid foundation. Getting the right talent and innovative ideas Yes, we have all the talent who can do it. Yes, Riyadh can become a gaming Hub by using its resources for tech investment fostering talent, and creating partnerships with global gaming industries. This strategic approach can position Riyadh as a leader in the gaming world. Of course! Because there are talented people out there who just want someone to support their ideas. Yes! Because we are "SAUDIES" we can do anything. Yes, if Saudi can't do it know who can do it, and if Saudi can't do it now it will be very hard to compete with other tourism and gaming hubs. How do we need to integrate the government infrastructure and business establishment and support journey/process? The failure recipe is to continue the fragmented efforts. Yes, Saudis have succeeded in developing various environments in different fields, and there is no doubt about their ability to do so. This is achieved through the adoption of principles and foundations of the gaming ecosystem and its infrastructure from successful companies. Yes indeed! Because of the availability of vision & Strategy, Talents, Qualities, Funds, Empower from the country's highest authority in line with our Saudi 2030 great vision. The Yes, Saudis have the potential to develop a robust game ecosystem and infrastructure in Riyadh, leveraging the country's strong economic resources and a young, tech-savvy population. The key would involve investing in technological infrastructure, fostering education and training in game development, encouraging local and international partnerships, and establishing supportive policies and incentives for startups and established companies alike. This multifaceted approach can catalyze the growth of a vibrant gaming community, drive innovation, and position Riyadh as a significant player in the global gaming industry.

Conclusion: The research provided insight into how gaming is developing in Riyadh, Saudi Arabia. Analyze and debate the government's plan and the requirements of Vision 2030. The study focused on a crucial issue since prior research had not addressed how to set up the infrastructure and ecosystem to open doors for Saudi gamers and other stakeholders in accordance with Vision 2030. Everyone involved agreed that a government regulator was necessary to help build the foundation and infrastructure and to offer rules, regulations, and processes. Additionally, a committee under the Saudi National Esports Federation ought to be established to include other stakeholders including MCIT, Monshaat, and significant business sectors to strive toward completing the requirements to clear the path for building the basis and necessary infrastructure. A study curriculum that is tailored to each educational phase should be created by the government regulator in collaboration with the Ministry of Education and educational establishments to promote and encourage involvement and inclusivity, emphasis should be placed on creativity and innovation as well as the creation of a clear patent act or legislation, To guarantee and promote the success rate of the projects and agreed-upon outcomes from the partnerships, government funds and subsidies must have clear milestones and criteria, such as Saudization % for leadership posts with all beneficiaries, To guarantee that successful experiences are had by all Saudis, efforts should be made to raise awareness and gaudiness, not merely to supply funds. Lastly, internship programs must to be improved, expanded and monitored by a committee.

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The Relationship Between Electronic
Gaming and Health, Social Relationships,
and Physical Activity Among Males in
Saudi Arabia

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APPENDIX:

4/4/24, 10:55 PM

THE POTENTIAL EFFECTS TO REVOLUTIONIZE THE GAMING INDUSTRY IN The capital of SAUDI ARABIA RIYADH On Saudi Gamers AND ALIGNMENT WITH VISION 2030

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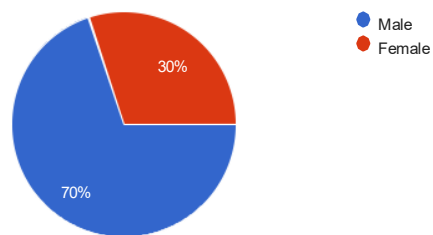
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Gender

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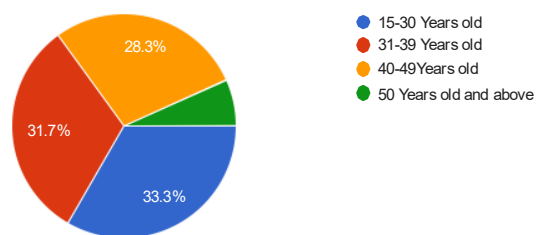
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Age

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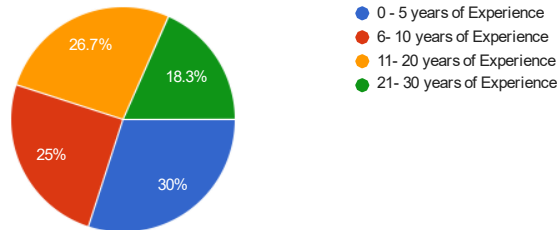


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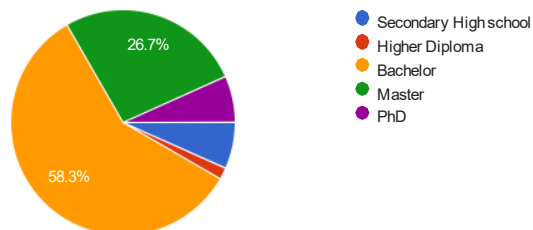
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Years of Experience Copy

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**Educational Background** Copy

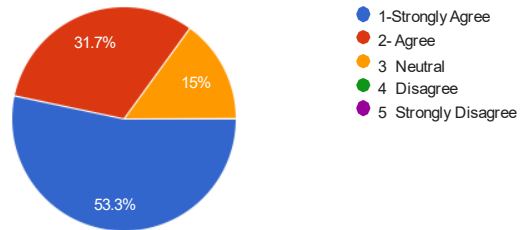
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**Section/Part 1:**
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1- The gaming industry in Riyadh, Saudi Arabia, needs a governmental regulator to support and establish a robust ecosystem.

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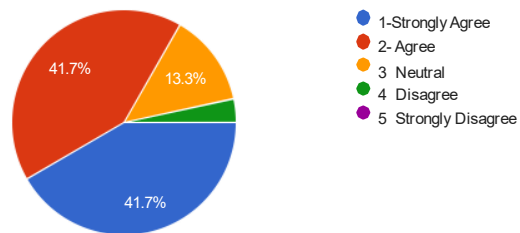
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2. Governmental regulators should invite well-known Western gamification educational institutes, such as those from the US or China, to open branches and operate in Saudi Arabia Riyadh, with exceptional facilities for 5 years.

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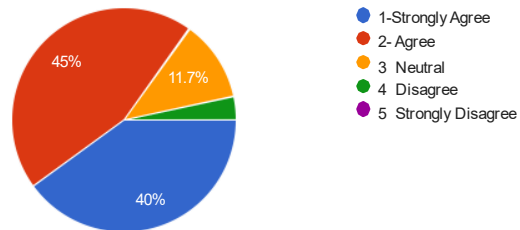
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3. Governmental regulators should make joint-venture investments with well-known Western gamification educational institutions, such as those from the US or China.

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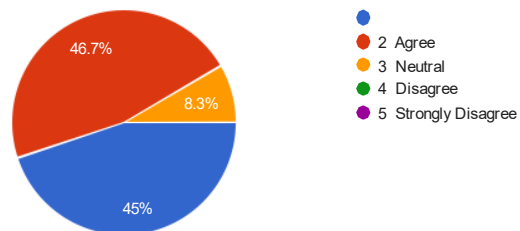
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4. Both the Government regulators and Universities in Riyadh should send teachers in partnerships or apprenticeship programs to well-known Western/Asian countries to attach with peers out there.

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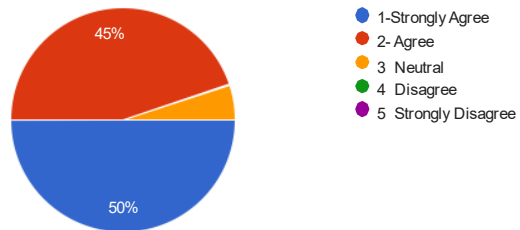
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5. Government regulators and the private sector should go for secondment programs for Saudi talents with international companies and studios as secondees for 1–2 years, for hands-on practices

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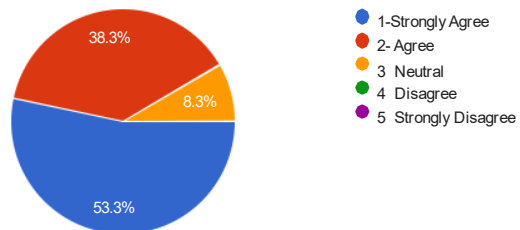
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6. Governmental funding to stakeholders should be more regulated with clear milestones.

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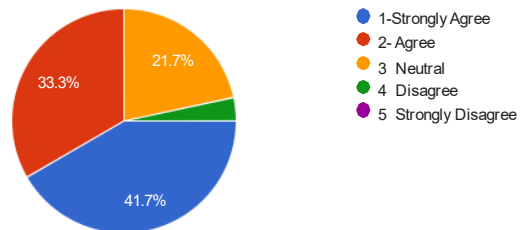
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7. Governmental subsidy and funding merit should achieve specific requirements by the stakeholders, e.g., the number of Saudis in the organization, both male and female, and the percentage representation of executives and critical roles.

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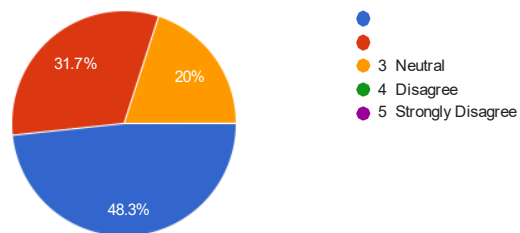
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8. Governmental entities such as MCIT, Monshaa t, Neom, and the E-Sport Federation should undergo a partnership memorandum to enhance the design and unified efforts to establish the ecosystem properly.

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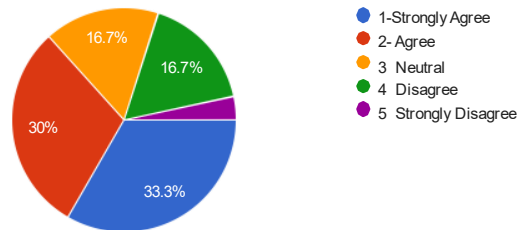
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9. King Abdulaziz and his companions' foundation for giftedness and creativity should accommodate a gaming incubator "accelerator" for school students only.

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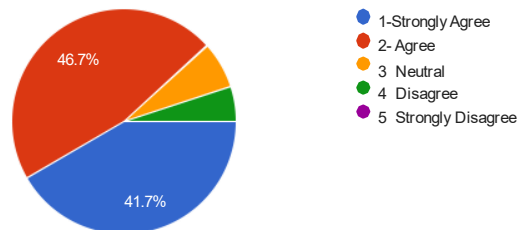
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10. Internships with well-known companies and studios in Riyadh are very beneficial and value-added effectively and efficiently.

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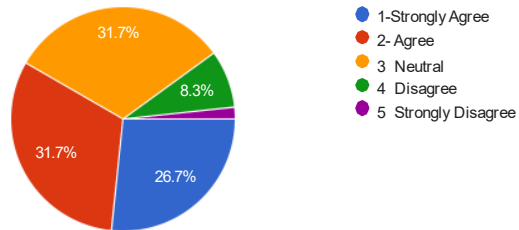
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11. Vision 2030's requirements regarding gaming are understood with deliverables.

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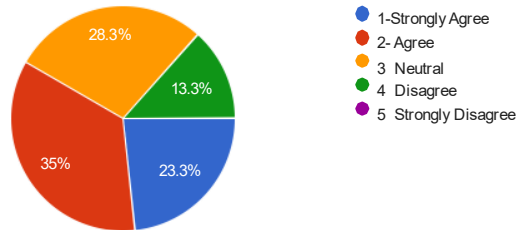
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12. People in Riyadh (Saudis and expats) are familiar with Vision 2030 milestones.

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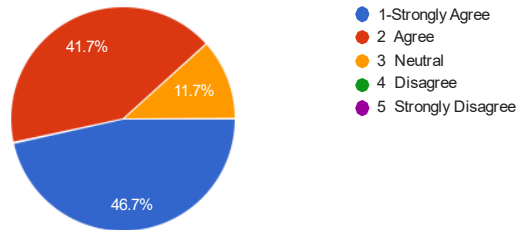
[Section/part2](#)



1- Universities in Riyadh should design academic and educational criteria for gaming studies.

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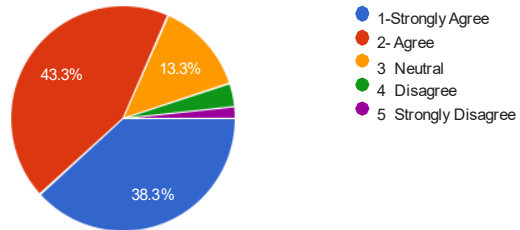
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2-Various Saudi educational systems in Riyadh should include gaming subjects in the curriculum.

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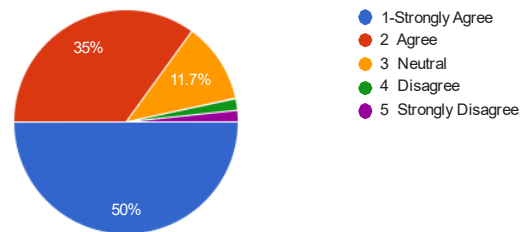
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3- Schools should have a stream of vocational, innovation, and creativity activities in the curriculum, including gaming subjects at educational levels such as elementary and secondary-high schools for both genders.

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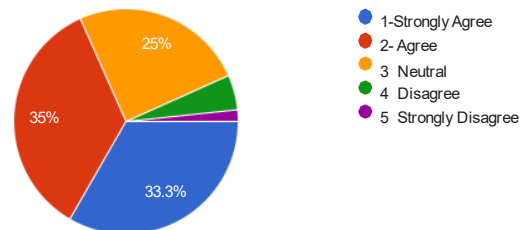
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4- All of Riyadh's universities should develop a games curriculum in the first phase, then share implementation kingdom-wide if it is successful.

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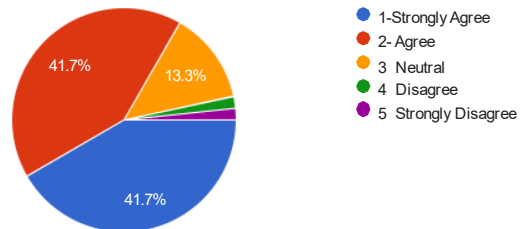
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5- Teaching game analysis is very important.

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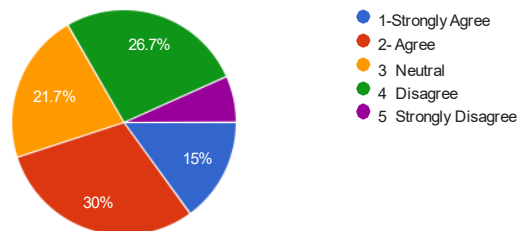


Section/part3
Section/part3

1. Start-up Saudi gaming companies have a clear strategy before operating the business .

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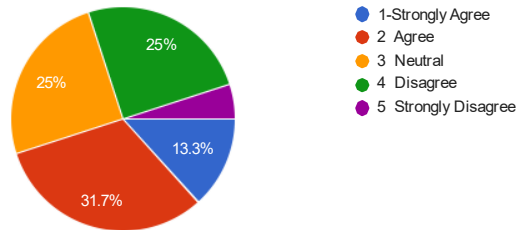
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3- Start-up Saudi gaming companies have a clear plan for the first 3–5 years.

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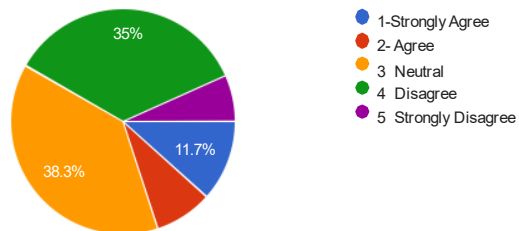
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4- Most successful Saudi gamers are educated and have studied gaming.

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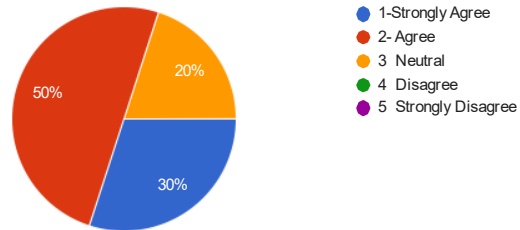
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5- Most successful Saudi gamers didn't study gaming and followed their passion.

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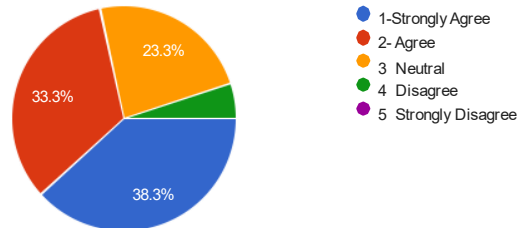
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6- Most Saudi gamers apply self-learning and master the required skill set regardless of their studies.

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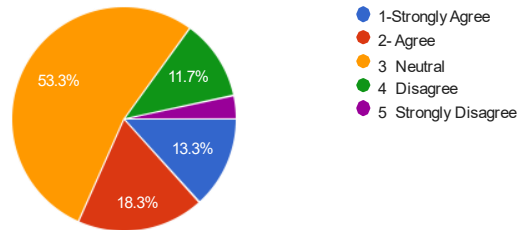
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1- There are successful Saudi game examples produced and developed by Saudis.

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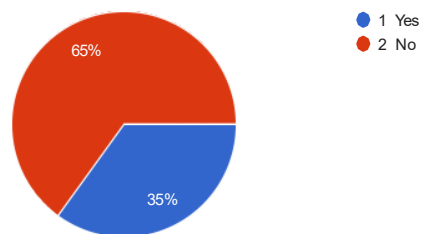
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2- Do you know a specific Saudi-produced game ?

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60 responses



Share examples of Saudi games that have been successful.

60 responses

NA

.

N/A

I don't know

None

Na

I don't know

Under development games

None

There is a lot

Bowling & Archery

forgot the name, one with skeleton pirate

Not Aware

Don't know

Sticks and bones, made by a single Saudi developer

Jawakar

King of steering & كئلم

كئلم

Hajwala



i still have no ideas yet!

Camel Run 3D

car drifting game not sure of name

I cannot remember any8

Kamlna

I don't know anybody

im not aware of success ful saudi published games yet but have seen exciting projects and concepts produced by saudi game designers, developers, etc.

I dont know any

Monopoly go

Who catch camels, cards (balot)

Badiya

0

Sticks and bones

هجوئل

PMGC etc

na

n/a

-

KING OF STEERING

i don't know

don't know



لا أعرف

Don't know

KamIna, Whist Game

Last letter آخر حرف

بازيل , بريخا

Steer Games

...بازيلكم يا سلفا

Bahoot , fa teel

Faz3a mobile game

KamIna

Have no experience

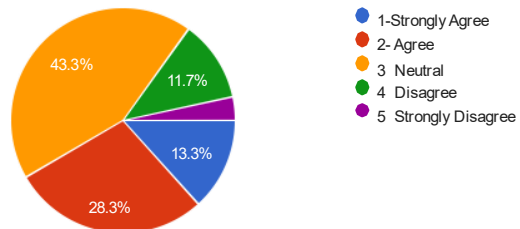
Section/part5

Section/parts

I- Game design takes at least six months and could be successful and profitable.

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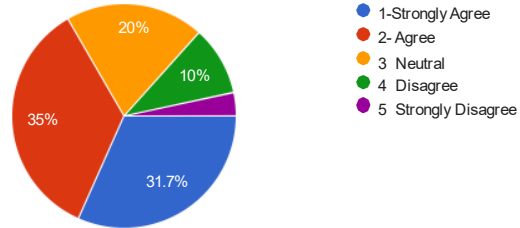
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2- Mobile games are the primary focus and trend nowa days.

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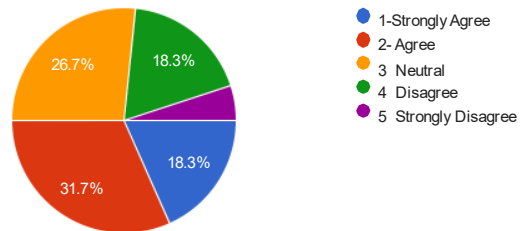
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3- Mobile games are more profitable than console games.

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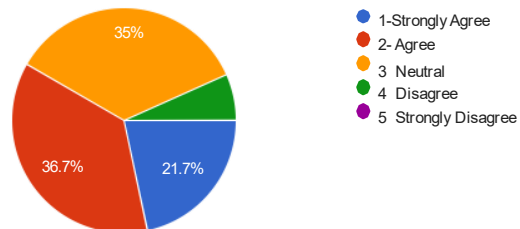
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4-Mobile games overall consist of casual,hyper-casual,midcore,and strategy types.

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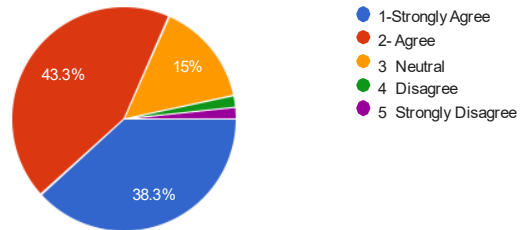
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5- E-sports could enhance and contribute to the games industry in Riyadh, KSA, and increase local production.

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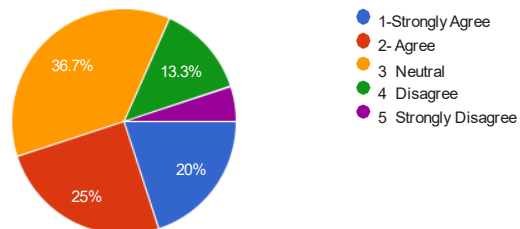
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6- Great game design takes 3 or 5 years.

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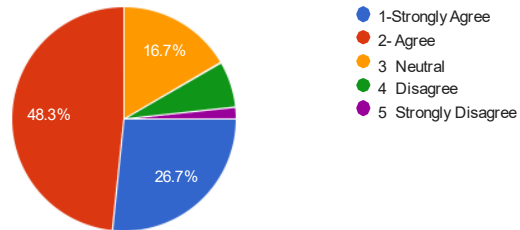
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10- Most localized games fail if not done by an expert and someone familiar with the area and culture.

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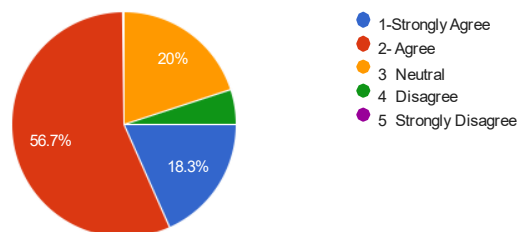
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11- Western games can be localized into an Arabic version.

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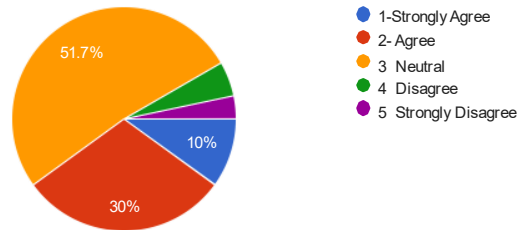
60 responses



12- Saudi gamers present themselves as a hyperlinked culture from Western culture.

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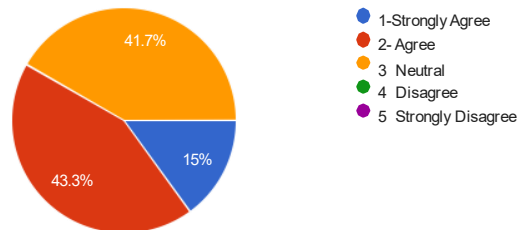
60 responses



13- Gamers in Saudi Arabia present themselves as an emerging archetype of gaming culture.

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60 responses



Section/part5



I-What is your opinion about establishing Riyadh as a gaming MENA and global HUB?
Why? How?

60 responses

Good

Great idea due to the high supply and sufficient of demand. Need s a holistic view and efforts between all stakeholders

Increasing local talent

Its the right time to establish. And has so much potential now that the gaming industry is striving in the Mena region. Its going to be very competitive. Better to start establishing now that its blooming

Its a possible considering the efforts and support given by the government.

Saudi will be the leader in MENA, in addition to the available resources.

It would be great

To Saudi Arabia, get to know it closely, and see the work being done directly. Tebas described those who do not see Saudi sports work and the desire to develop and advance football and sports in general

without high quality product made by a Saudi Game Studio, all these funds will be diverted to outside.

Vision2030

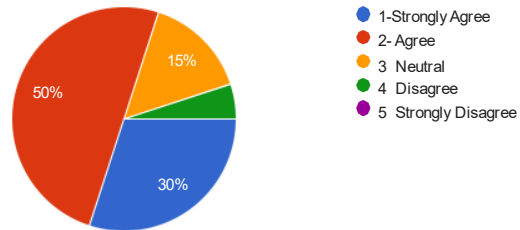
in Alignment with VISION 2030, Govt. Heavy Investments in IT, AI, Also Riyadh city is being invested heavily to become global city in the future, this enables the city to host and facilitate millions of talented people from across the globe, with the additional Govt. Support in building good and business policies for doing business, a lot big companies are setting up offices in Riyadh, Local Talent is attracted to Riyadh City considering latest developments, attractions. With more than 60% of Saudi Nationals as youth, there's going to be more attraction towards Gaming Industry. I strongly believe Riyadh is strategically poised to be potential global gaming hub, by bringing world famous gaming companies to partner with local companies and also encouraging start ups to develop Arab cultural games attracting not just national but regional population, while protecting and supporting the Arab Culture and Heritage. Can also invest in specific education programs for Gaming enthusiasts.



7- Localization is important in game design and production and increases sales with a high retention rate.

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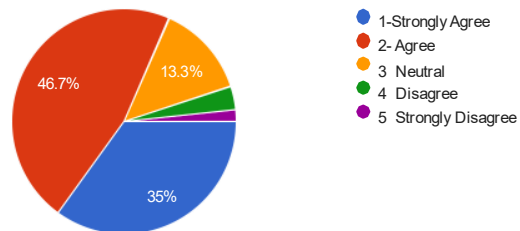
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8- Localization requires native nationality to reflect the design properly.

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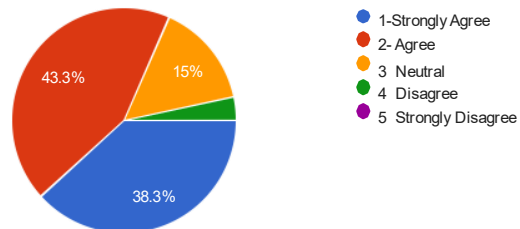
60 responses



9- It's essential to localize culture for games.

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60 responses



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