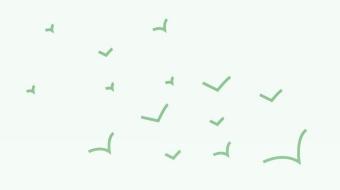


PUBLIC FIRST

SAUDI ARABIA'S AI FUTURE

How Google is Powering the Next Wave of Economic Innovation









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Google's Al-powered tools are accelerating the Kingdom's growth

Saudi Arabia has been among the Middle East's fastest-growing economies, reaching a GDP of over \$1 trillion in 2023. Spurred by Vision 2030 and the rapid expansion of digital infrastructure, the Kingdom is harnessing artificial intelligence (AI) as a cornerstone of its future – one that accelerates economic diversification, fosters sustainable growth for the next generation and positions the Kingdom as a global leader.





Generative AI could grow the Kingdom's economy by **727 SAR billion**, the equivalent of 19% of Gross Value Added (GVA).

Al is helping new industries grow faster, making the Kingdom's economy less dependent on traditional sectors.

We estimate that generative Al alone could boost the Kingdom's economic diversification by nearly 14%.

The momentum behind AI adoption in Saudi Arabia is already in full swing. According to new research by Public First, **80%** of Saudi adults reported using AI tools, with **1 in 3** using them regularly. This is more than double the number of adults in the United States who report "regularly" using one of the LLM-based chatbots, which stands at just **13%**. Meanwhile, **53%** of businesses already rely on at least one AI tool in their workflows, and **88%** of businesses agree that AI is an important opportunity for the Kingdom's economy.

This progress is underlined by a surge in Al-focused startups, robust government investments, and growing consumer enthusiasm for emerging innovations. We found that 90% of adults believe that becoming an Al superpower should be a top priority for the government.

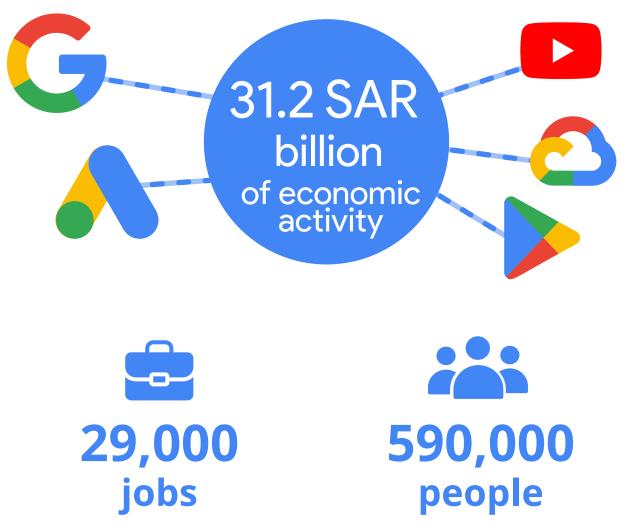
GDP (current US\$) - Saudi Arabia, World Bank, 2024

² Public First 2024

Google is playing a key role in supporting this transformation, from partnering with local institutions and businesses to drive forward-looking AI solutions, expand cloud infrastructure, support developer communities and champion responsible AI practices. Google's ongoing initiatives aim to help Saudi Arabia realize the full benefits of AI – shaping a digital ecosystem that thrives on shared expertise, robust security, and long-term economic impact.

Al is set to transform Saudi Arabia's economy, opening new opportunities in business, industry, and digital connectivity. Through its wide range of Al-powered products, continued investments and partnerships, Google can help power this shift - fueling the Kingdom's transition to a diversified, tech-driven future.

In 2024, **Google Search, Google Play, YouTube, Google Cloud** and **Google Advertising** tools provided **31.2 SAR billion** of economic activity for Saudi Arabia's businesses, nonprofits, publishers, creators and developers. This is equivalent to 1.6% of Saudi Arabia's non-oil GDP.



The app ecosystem underpinned by Google Play and Android has enabled the creation of **29,000** jobs in 2024.

Through the key upskilling initiative

Maharat Min Google, Google has trained over 590,000 individuals in KSA since 2018.3



Making everyday life easier

Google at its core is focused on organising the world's information and making it useful in increasingly innovative ways. Through Al-powered tools like **Search**, **Maps**, and **Gemini**, **Google** is simplifying a wide range of daily tasks for Saudis: from finding the quickest route to translating content in real time.



Google's services create consumer benefits worth **564 SAR a month**, or almost **6,775 SAR a year**. That is equivalent to **162 SAR billion** on additional consumer welfare benefits.



53% of adults said they had used Gemini, Google's Al Assistant, and **1 in 3** of users now use it every day. **86%** of users agreed that Gemini helped them to be more productive. **78%** of users agreed that Gemini is easier to use in Arabic than other Al chatbots.



54% of adults agree that Google Search is essential to their daily lives and **89%** said that they find the results of Google Search reliable.



88% of users said that Google Maps and/or Waze was helpful to avoid getting lost, **89%** of consumers reported using Google Maps and/or Waze to find the fastest route to their destination, and **84%** of adults that drive agree Google Maps and/or Waze helps with driving more safely.

Equipping the Saudi workforce with the right digital skills

Google's Al-powered products and platforms are helping Saudis sharpen their digital skills offering opportunities for learning, research, and innovation in an increasingly Aldriven world. This will be all the more important as Saudis of all ages keep pace with the Altransformation.

An estimated

20.4mn

adults in Saudi Arabia have used Google Search in the last year to learn a new digital skill.



Every year, the digital skills people have learned through Google Search boosts the Saudi economy by an estimated

203 SAR billion

57%

57% of adults agree that they are not currently using AI tools to their full potential, demonstrating an appetite – and a need – for more skills training across the Kingdom.

92%

92% of adults said they would be interested in participating in a Google skills programme to develop their technical skills.

Google plays a particularly important role supporting young people's education:



Gemini

66% of 18-24 year old **Gemini** users said they had used it to support their studies (i.e. ideas for a project or revise a topic).

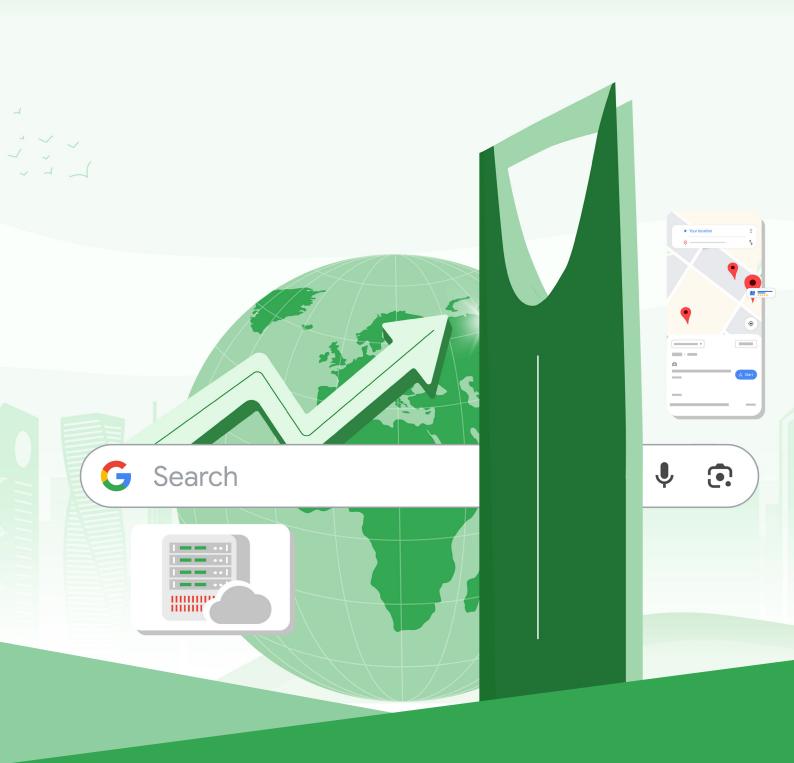


Search

77% of 18-24 year old Google Search users agreed that their education would have been more difficult without it.



65% of 18-24 year old YouTube users said they find it a very helpful tool to learn new things.



Connecting businesses to customers around the world

Google's tools are helping Saudi businesses of all types, from small retailers to global exporters and government bodies, reach new customers around the globe. From Search and Ads to Analytics, businesses are using Google's platforms to grow their visibility, improve marketing performance, and export overseas.



89%

89% of adults use Google Search at least once a month to compare the prices of products and services. **77%** of 18-24 year olds said they use Google Search at least weekly to shop or browse products online.



70%

70% of adults use Google Maps and/or Waze at least once a month to find a local business and **86%** of those users said they had checked Google reviews at least once a month before visiting a local venue or business.

1 in 3

1 in 3 startups reported that Google Ads helped to increase their profits and connected them to a broader range of customers.

27 SAR billion

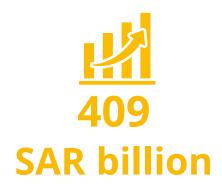
In 2024, we estimate that Google's Search and Ads alone helped provide **27 SAR billion** in economic activity for businesses in Saudi Arabia. Of this, Google Search, Ads and AdSense have helped Saudi businesses to export **2.6 SAR billion** of goods and services across the world.

720 SAR million

In 2024, we estimate that Google's Search and Ads alone helped provide almost **720 SAR million** in economic activity for SMBs. Of this, Google Search, Ads and AdSense have helped Saudi SMBs to export **70 SAR million** of goods and services across the world.

Unlocking the benefits of cloud technology

In 2023, **Google Cloud** announced the opening of its new cloud region in Dammam, bringing high-performance, low-latency Google Cloud Platform services to customers of all sizes, from public sector organizations and large businesses, to SMBs and startups in Saudi Arabia. This significant investment in the Middle East's technology landscape reflects the company's growing presence in the region and its commitment to supporting the realization of Saudi Arabia's Vision 2030 goals. This impact is then further accelerated by key programs such as Google for Startups.



The Google Cloud region in Saudi Arabia is estimated to contribute a cumulative **409 SAR billion** in higher gross economic output between 2024 and 2030.4

148,600 jobs

The increased economic activity driven by the Google Cloud Region in Saudi Arabia is estimated to support the creation of **148,600 jobs** in 2030 alone.⁵



In 2024, PIF and Google Cloud announced a strategic partnership to create a new global AI hub which is expected to increase Saudi Arabia's GDP by **266 SAR billion** over eight years.⁶

2.88 SAR billion

To date, startups from 6+ MENA Google for Startups Accelerators have raised more than **3.55 SAR billion**, **2.88 SAR billion** in Saudi Arabia alone, while creating over **1,335** new jobs in the region.⁷

⁴ Access Partnerships, 2023

⁵ Access Partnerships, 2023

⁶ Google Cloud, 2024

⁷ Source: Internal data provided by Google.



SDM:

Scaling AI-powered healthcare with the Google for Startups Accelerator

Healthtech startup SDM is transforming the diagnosis of chronic diseases. Confronted with scarcity of skilled healthcare providers in rural areas, SDM's mission is to create an Alpowered platform with expedited diagnosis, superior accuracy, and an economically feasible examination. This began with tackling diabetic eye disease (retinopathy), prior to expanding to other chronic conditions including glaucoma, hypertension and heart diseases.

Google is powering SDM's journey through their involvement in the Google For Startups Accelerator - which aims to empower startups to build with the latest AI solutions and unlock faster growth through Google Cloud technologies. This was achieved via a curated program anchored in comprehensive workshops, focused mentorship, technical guidance and access to up to \$300,000 in Google Cloud credits.

As a result, SDM saved 30% of their operational costs by migrating to Google Cloud. SDM now delivers expedited and actionable diagnosis, alleviating long queues from months to near real time. These expedited, highly accurate diagnoses, cut costs for patients in an extremely convenient manner. SDM's Al-powered solutions can be 50–60% more economical than traditional methods. Al clinics currently operate more efficiently by reducing unnecessary clinic visits through smarter scheduling with a more convenient follow-up guidance.



The Google for Startups Accelerator was truly an eye-opening experience for SDM. The customized sessions designed for founders were extremely valuable for our engaging Engineers as well. We gained insights on system architecture, best practices, and the correct tools to use. It has made a significant difference in how we in SDM build and deliver our solutions.

Naif Al Obaidallah Co-founder, SDM



Almarai's digital leap: A new era for food & beverage, powered by Google

Almarai — a titan in the Middle East's food and beverage sector — is the world's largest vertically integrated dairy company, recognised as the fourth most valuable dairy brand globally in 2024. They're also fiercely focused on leveraging cutting-edge technology.

To turbocharge their digital transformation and conquer the limitations of traditional infrastructure, Almarai made a strategic leap, migrating core business functions — including their SAP ERP system — to Google Cloud. This bold move unleashed incredible benefits: flexible scalability, dramatically reduced capital costs, and the power to deliver faster, smarter services seamlessly. Crucially, this migration also champions data sovereignty by hosting data within Saudi Arabia, aligning perfectly with Vision 2030 and Almarai national commitments. It stands as the pivotal first step in Almarai's grand vision for operational excellence and truly elevated customer and employee experiences.

Beyond their foundational cloud infrastructure, Almarai also strategically harnessed Google Ads to powerfully expand their reach and connect with more consumers. By leveraging custom user insights to design optimum product mixes during the second half of 2024, they masterfully reduced their cost per acquisition (CPA) by an impressive 46%, and increased views by 63%. Google also assisted Almarai in creating highly targeted and contextually relevant YouTube campaigns, leveraging Al to generate over 1,200 personalised ads that resonated with viewers' interests, resulting in 29.4 million views and a 56.8% completion rate. Meanwhile, Google's Video Incentive Programme (VIP) — offering YouTube credit for video media spend — proved instrumental in helping Almarai effectively reinvest and sustain their media spend.



With traditional infrastructure, we've had to worry about data, space management and availability. All of those concerns are easily managed with Google Cloud. With proper planning, we've been able to overcome every challenge on the spot and smoothly migrate. And we haven't had a single ticket raised by a user.

Dr. Faisal Al Nasser Head of Enterprise and IT, Almarai

Boosting productivity in the workplace

Al is helping Saudis work smarter. Whether through generative tools like **Gemini** or everyday apps like **Search** and **Workspace**, Google is enabling people to work more efficiently, and focus on higher-value tasks. This is particularly true in the public sector.

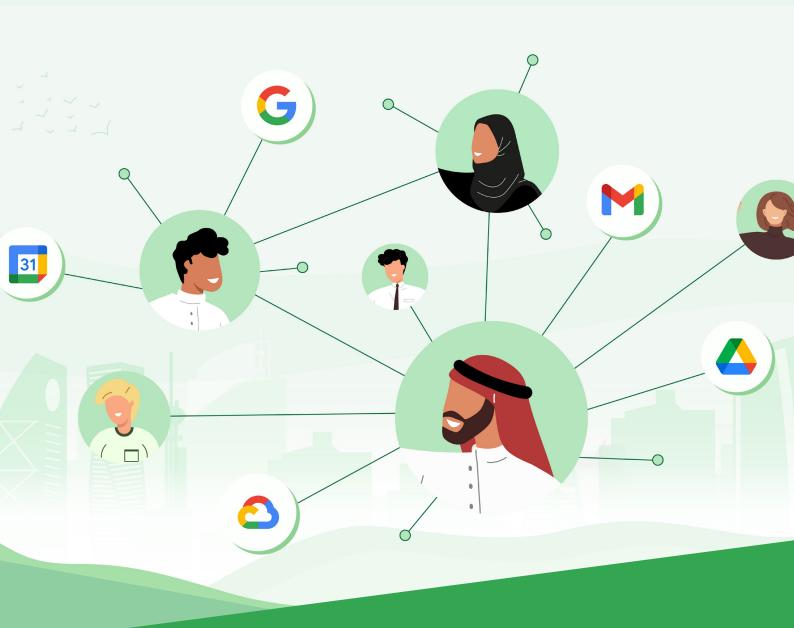


We estimate that AI tools could help increase productivity across the KSA by **16%**. This is equivalent to **288 hours per worker** reallocated to higher value tasks per year.



90%

90% of public sector workers said that Google Al-enabled tools help them to be more productive at work, and **70%** say their job would be harder without access to Google's tools.



Supporting a sustainable news industry

An important element of driving Google's overall mission is connecting users to news what matters to them and supporting journalists to get this job done. For over 20 years, Google has worked collaboratively with the news industry and provided billions of dollars to support journalism in the digital age.

One of the key programs bringing this commitment to life is the Google News Initiative. The **Google News Initiative** (GNI) is committed to partnering with publishers to foster a more sustainable future for the news industry. Through its collaborative partnerships, innovative products and programs, GNI aims to empower news publishers to leverage the benefits of AI and thrive in the digital landscape.



20,000+

Google News Initiative has trained over **600,000** journalists and journalism students globally since 2015, including **20,000+** in the MENA region alone.



Experimenting with AI in the newsroom:

Arab News Al-Powered Storytelling with Google's NotebookLM

On its 50th anniversary, Arab News, a leading English news publication in the Middle East, collaborated with Google to experiment with AI tools, creating new ways to engage audiences. Using Google's NotebookLM, Arab News published "Recounting the Moments that Changed the Middle East", a five-episode podcast series that used AI to narrate historical events in the region, offering fresh, in-depth insights into each decade since 1975.

The series was created by Google's NotebookLM, an Al-powered research tool, which helps users find, summarize, generate audio overviews and gain insights faster from their information. This innovative project leveraged Al to generate audio overviews and narrate historical events drawing from Arab News' extensive archives, showcasing how technology can support in-depth storytelling and audience engagement.



This is a first step into what will be a very exciting future, whereby artificial intelligence is going to help us tell the story of the region to a wider audience. As an industry, we have suffered far too long from analysis paralysis, while artificial intelligence is evolving every day, we should simply just do it and remember that amateurs talk strategy, while professionals talk logistics, as the late World War II general, Omar Bradley, once said.

Faisal J. Abbas Editor-in-Chief, Arab News

Partnering with local developers to capture opportunities

The **Android** and **Play** ecosystem is driving job creation and entrepreneurship across the Kingdom. From local app developers to digital startups and exporters, Google's mobile platforms are enabling Saudis to build, innovate, and grow in the digital economy.





In 2024, we estimate the Android App Economy generated over **20.7 SAR million** in revenue for Saudi developers.

In total, we estimate that Android and the Play Store are supporting 7.5 SAR million in exports in the Kingdom.



8

Over the past year, developer community training initiatives have reached more than 74,000 developers across Saudi Arabia, educating developers across Google's Al, mobile, Cloud, web, and Geo platforms and helping produce a highly skilled technical workforce 8

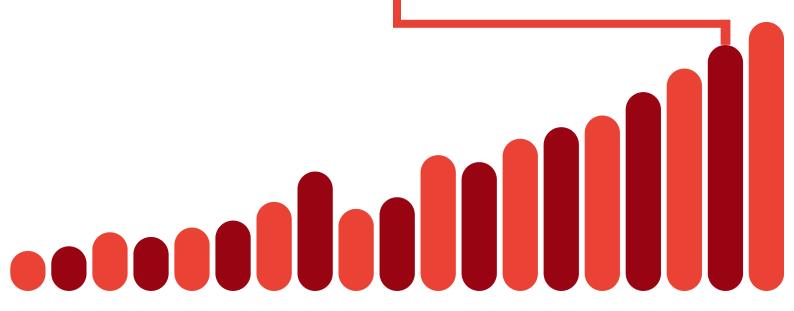
Powering Saudi's Creator economy

YouTube offers Saudi creators a platform to share their culture and creativity with the world across multiple formats. Their content resonates strongly with viewers – particularly younger audiences – who view it as having high production value and are increasingly inspired to turn content creation into a thriving career.

In Saudi Arabia, the number of YouTube channels making

7 figures

or more in SAR is up 40%, year over year



79%

79% of adults in KSA think that content creators produce content of equal production value to traditional media, with **1 in 3** regularly watching YouTube videos on their TV.

72%

72% of 18-24-year-olds in Saudi Arabia have considered pursuing a career on YouTube as a way to earn a living.

88%

88% of adults in KSA said they watch YouTube videos by local creators at least monthly, and **84%** agree that local creators help to share Saudi Arabia's culture with the world.



YouTube: Supporting creative entrepreneurs in Saudi Arabia

In Saudi Arabia, YouTube is helping people build vibrant communities around topics that matter to them, while crafting personal brands, and launching successful businesses. At the heart of YouTube's impact are the creators who come to the platform to bring their passions to life, creating real world impact. The experiences of Raoum from Sukkari Life and Manal Marvelous are a testament to this impact.

Through her authentic videos on YouTube, Raoum documented her transformation from a self-proclaimed "healthy eating skeptic" to a passionate plant-based advocate inspiring a community of over 100,000 loyal subscribers. The Sukkari Life channel enabled Raoum to transform her entrepreneurial aspirations into a reality from starting her own e-commerce lifestyle business to becoming a yoga teacher. The strong foundational trust directly built with her audience turned into significant business growth, with an estimated 70% of her business stemming directly from her YouTube channel.



"YouTube was the foundation for everything. It allowed me to truly connect with my audience and build trust. By the time I decided to offer yoga classes or launch my online store, there was already a community that believed in my vision."



Manal Marvelous is a Saudi fashion and lifestyle Creator whose YouTube channel blends everyday storytelling with creativity, culture, and connection. Her carefully crafted channel started as a place for Manal to express her creativity but now has garnered over 100,000 engaged subscribers and helped Manal forge a career as a creative entrepreneur. YouTube was the foundation of her personal brand allowing her to build trust and visibility that extends far beyond the platform, while creating opportunities for brand collaborations with the likes of Garnier, Hollister, Virgin Mobile, and Netflix.

Beyond brand partnerships, YouTube also served as a training ground for Manal, teaching her crucial business skills such as storytelling, marketing, video production, and negotiation. The income generated from YouTube was transformative for Manal, providing financial independence and the freedom to pursue her personal and professional goals.



"YouTube helped me build a community that feels like family. It's not just views—it's real connection."

Together, the journeys of Manal and Sukkari show how YouTube empowers creators to cultivate deeper connections with an engaged community, while transforming their creative passions into sustainable, long-term careers.

Supporting local nonprofits to enable communities through Google.org

Through Google's philanthropic arm, **Google.org**, Google supports local social innovators and nonprofits to make the most of the opportunity that technology brings and advance local communities. This support helps to boost overall economic growth, with Public First estimating that every **\$1** invested in the Kingdom's digital ecosystem generates a **\$1.9 return** for the wider economy.

Google.org applies Google's innovation, research, and resources to promote progress and expand opportunity for everyone. Since 2019, **Google.org** has given more than **\$25 million** to organisations across the MENA region, including more than **\$17 million** in cash funding, **\$8 million** in in-kind giving and **7,000** pro-bono hours of Google employee time.

Google.org's activity focuses on three key areas:



Knowledge, Skills, & Learning:

Creating pathways for people to gain the technical and Al skills they need to thrive in the digital economy.

For example, with **\$1 million** support from **Google.org**, **Micromentor** is scaling its digital mentorship platform to empower over **21,000 entrepreneurs** across the region, contributing to the creation of **3,800 jobs** and the retention of **3,200 jobs**. Building on this success, Micromentor now aims to reach an additional **10,000 entrepreneurs** over the next two years, contributing to the creation and retention of another **2,600 jobs**. **Google.org** originally supported the launch and Arabic localisation of the platform in 2020, and also provided hands-on pro bono support for the organisation's first open-source, low-bandwidth mobile application through a 6-month **Google.org** fellowship.



Accelerating research and AI-enabled innovation for societal impact in collaboration with university partners and the academic research community.

For example, with **\$1 million** in support from **Google.org**, the International Water Management Institute (IWMI) is developing **e-ReWater**: an Al-powered platform that uses satellite imagery and earth observation data to help MENA countries make better use of their treated wastewater. The platform will ultimately feature an interactive dashboard that maps where and how treated wastewater can be reused, particularly in agriculture, the sector that consumes the most water.



Helping to build resilience online and in the places people live and work – promoting digital wellbeing, strengthening online safety, and supporting local communities.

For example, <u>INJAZ Al-Arab</u>, a nonprofit organization focused on business education and empowering the young minds of the MENA region to help them succeed in the global economy has received **\$1.5 million** in funding from <u>Google.org</u> supporting multiple initiatives empowering over **160,000** youth with skills needed to thrive the global economy, including with online safety skills. This online safety initiative grant has reached more than **50,000 students** directly, **3,500 teachers** who have access to an additional **140,000 students** and nearly **1,000 parents** across local communities in the MENA region.

This is just the beginning. In 2024, Ruth Porat launched the MENA Opportunity Initiative which included the announcement of **Google.org**'s planned contribution of **\$15 million** between 2024 and the end of 2027 to help leverage technology – and particularly AI – to help solve some of humanity's biggest challenges.

About the research

Google commissioned independent consultancy Public First to explore how Google's innovations and products are helping communities, workers and businesses in KSA, as well as the future potential of AI across the Kingdom.

Public First conducted a survey of 1,059 online adults based in the KSA and a survey of 370 business leaders based in the KSA. These surveys were conducted in English and Arabic in March 2025. All results are weighted using Iterative Proportional Fitting, or 'Raking'. The online adult results are weighted by age, gender, education level, and region to nationally representative proportions.

representative proportions. A full modelling methodology can be accessed **here**.



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