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Changing People's Lives

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1 **SUMMARY**

The Saudi healthcare sector is witnessing rapid transformation fueled by Vision 2030's focus on enhanced healthcare accessibility technology integration, and a shift toward preventive care. As the industry grows, understanding the Saudi consumer's behavior, preferences, and digital engagement patterns has become essential for healthcare providers and marketers alike. This analysis aims to offer insights into these dynamics, presenting data-driven observations that will help stakeholders make informed decisions and better navigate this expanding market



2

POPULATION OF SAUDI ARABIA IN 2024

37.1
million

The population of Saudi Arabia stood at 37.1 million in January 2024

532
thousand

Saudi Arabia's population increased by 532 thousand (+1.4 percent) between early 2023 and the start of 2024.

42.6
percent

42.6 percent of Saudi Arabia's population is female, while 57.4 percent of the population is male

57.4
percent

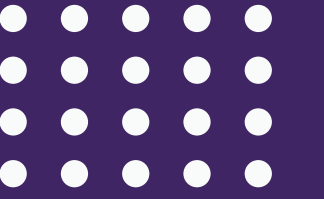
85.1 percent of Saudi Arabia's population lived in urban centers, while 14.9 percent lived in rural areas.



3 SAUDI ARABIA'S POPULATION BY AGE

- THE MEDIAN AGE OF SAUDI ARABIA'S POPULATION IS **30.9**
- 8.4 percent is between the ages of **0 and 4**
- 13.6 percent is between the ages of **5 and 12**
- 8.1 percent is between the ages of **13 and 17**
- 9.8 percent is between the ages of **18 and 24**
- 15.2 percent is between the ages of **25 and 34**
- 17.8 percent is between the ages of **35 and 44**
- 16.2 percent is between the ages of **45 and 54**
- 7.6 percent is between the ages of **55 and 64**
- 3.2 percent is aged **65 and Above**





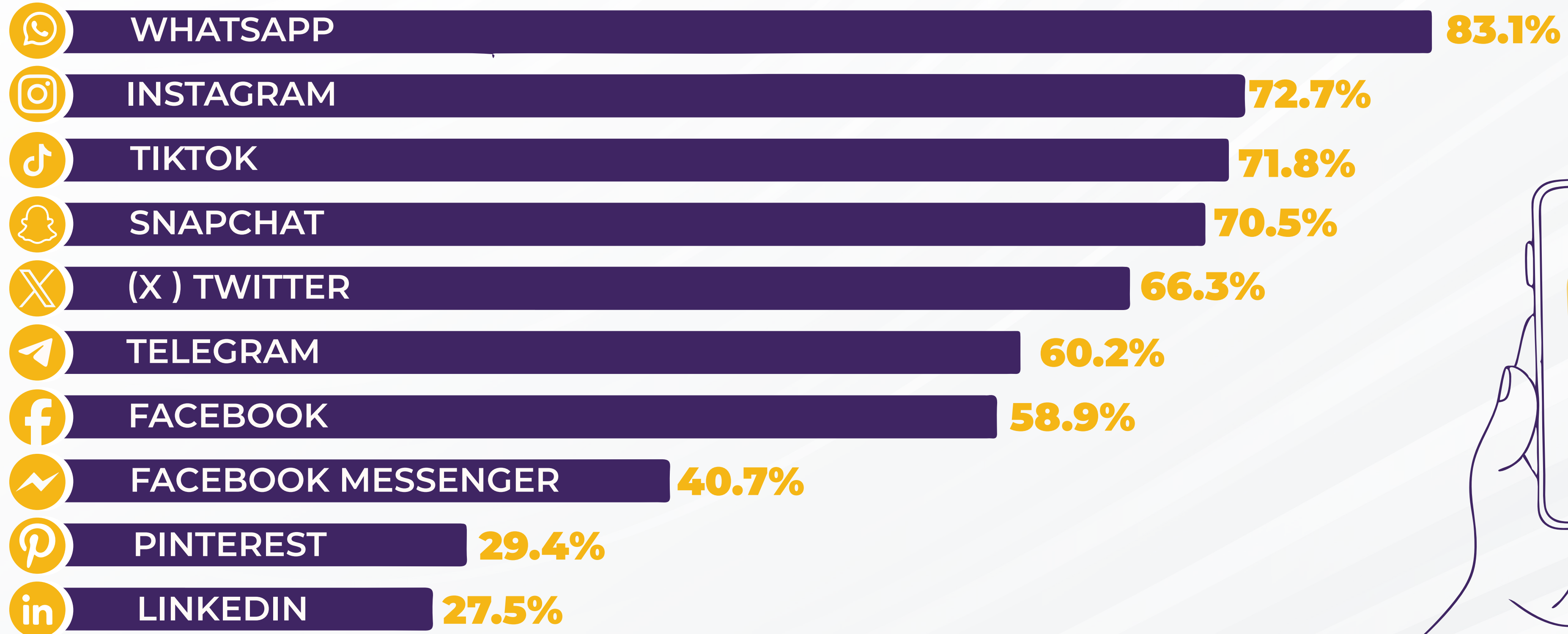
4 THE STATE OF DIGITAL IN SAUDI ARABIA IN 2024

- There were **36.84 million** internet users in Saudi Arabia at the start of 2024
- Saudi Arabia was home to **35.10 million** social media users in January 2024, equating to **94.3 percent** of the total population.

5 SOCIAL MEDIA STATISTICS JAN 2024

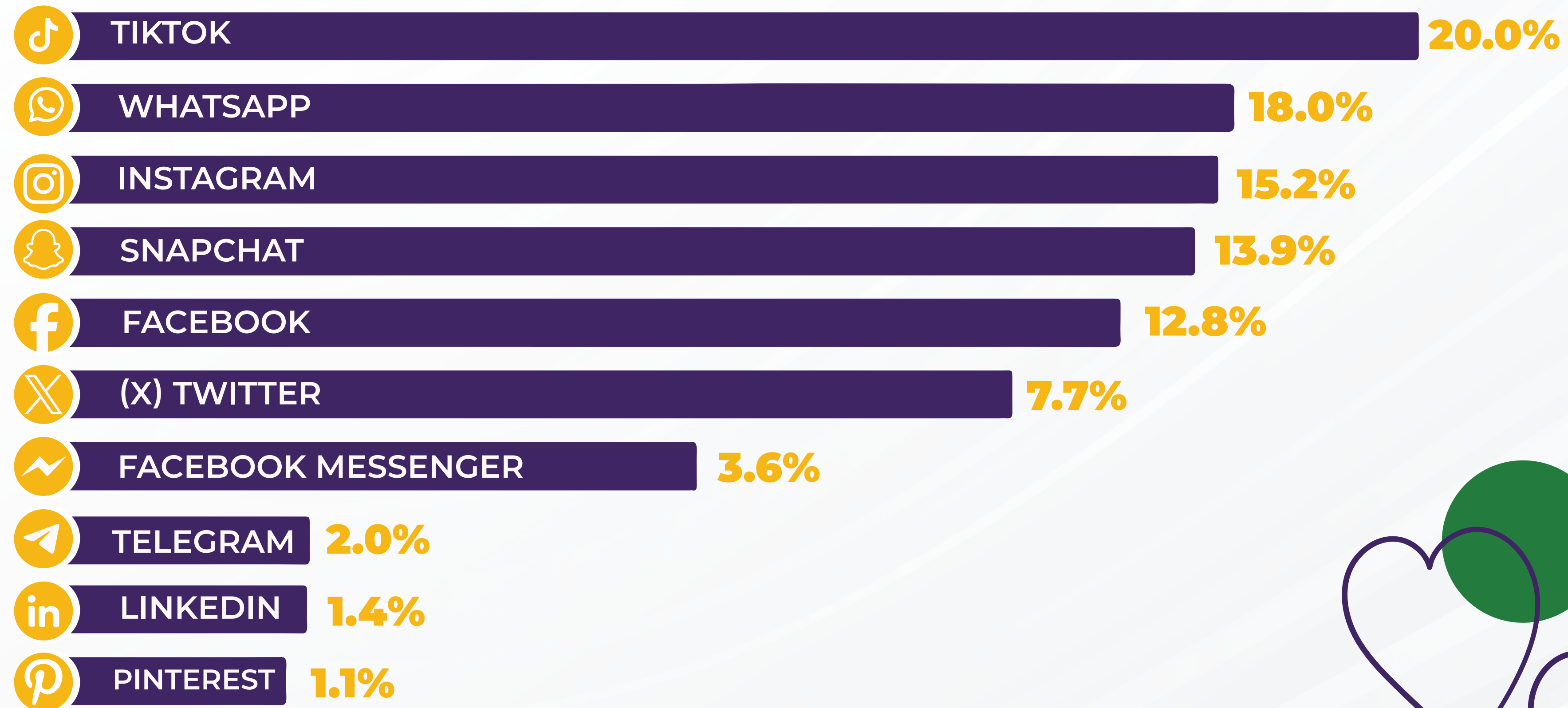
MOST USED SOCIAL MEDIA PLATFORMS

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH PLATFORM EACH MONTH



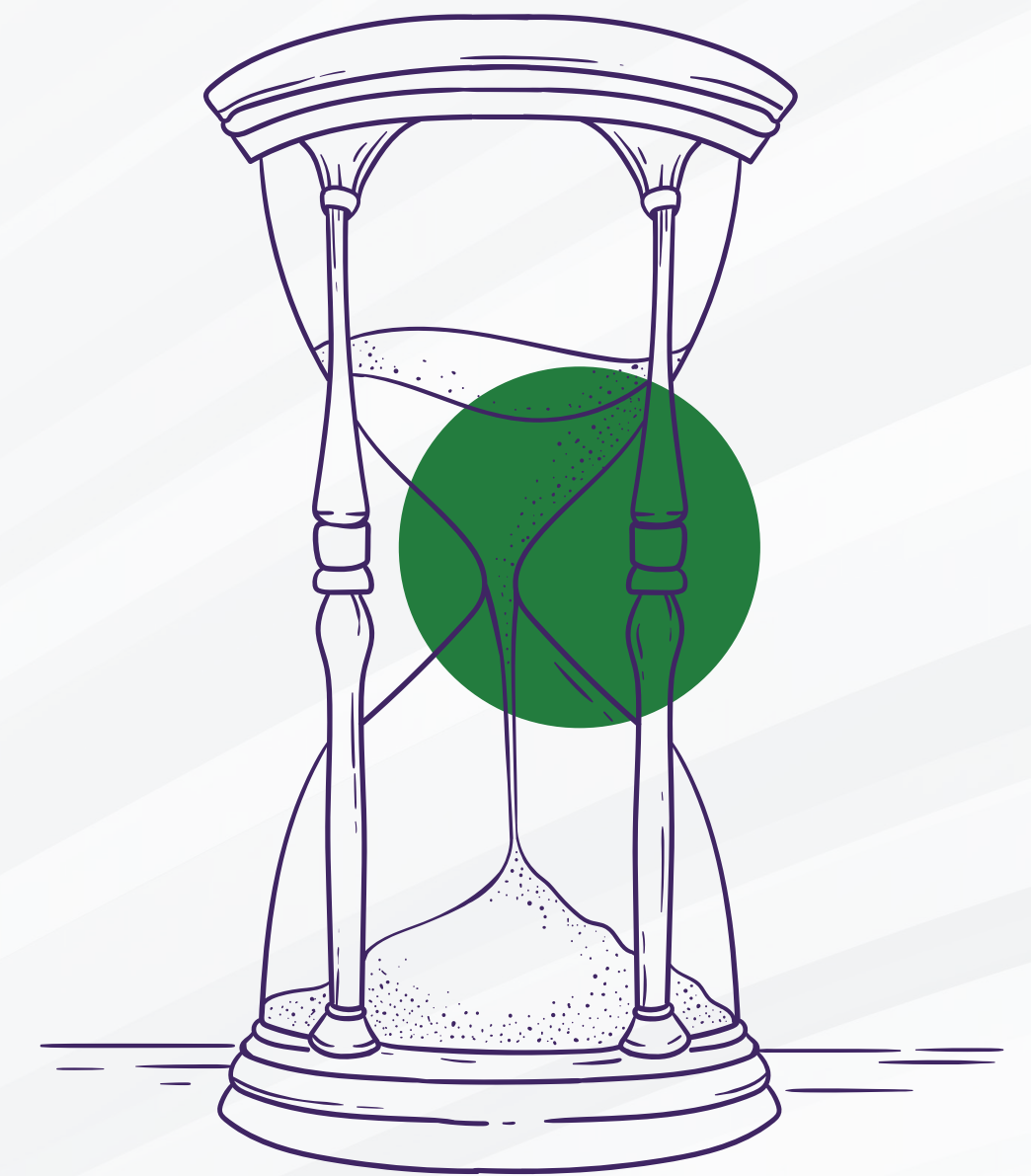
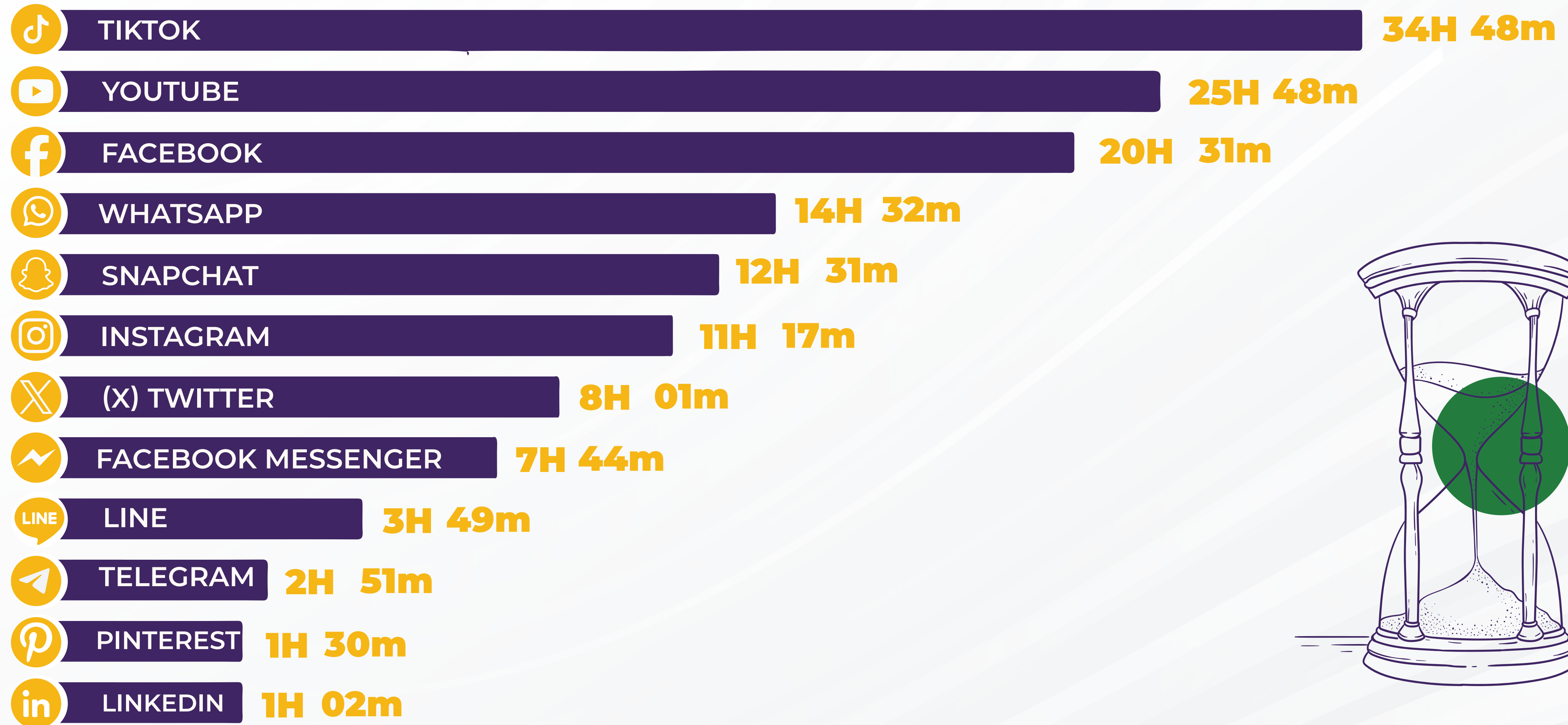
FAVOURITE SOCIAL MEDIA PLATFORMS **JAN 2024**

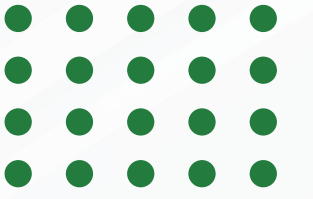
PERCENTAGE OF ACTIVE SOCIAL MEDIA USERS AGED 16 TO 64 WHO SAY THAT EACH OPTION IS THEIR (FAVORITE) SOCIAL MEDIA PLATFORMS



TIME SPENT USING SOCIAL MEDIA APPS **JAN 2024**

AVERAGE TIME PER MONTH THAT ACTIVE USERS SPENT USING PLATFORM'S ANDROID APP BETWEEN 01 JULY AND 30 SEPTEMBER 2023





f FACEBOOK USERS

- Facebook had **14.60 million** users in Saudi Arabia in early 2024.
- **22.7 percent** of Facebook's ad audience in Saudi Arabia was **female**, while **77.3 percent** was **male**.

▶ YOUTUBE USERS

- Google's advertising resources indicate that **YouTube** had **28.30 million** users in Saudi Arabia in early 2024.
- **39.9 percent** of YouTube's ad audience in Saudi Arabia was **female**, while **60.1 percent** was **male**.

@ INSTAGRAM USERS

- Instagram has **16.30 million** users.
- **43.0 percent** of Instagram's ad audience in Saudi Arabia was **female**, while **57.0 percent** was **male**.



TIKTOK USERS

- TikTok had **26.3 million** users aged 18 and above in Saudi Arabia in early 2024.
- **45.9 percent** of TikTok's ad audience in Saudi Arabia was **female**, while **54.1 percent** was **male**.

LINKEDIN USERS

- LinkedIn had **8.90 million** "members" in Saudi Arabia in early 2024.
- **24.2 percent** of LinkedIn's ad audience in Saudi Arabia was **female**, while **75.8 percent** was **male**.

SNAPCHAT USERS

- Snapchat had **22.64 million** users in Saudi Arabia in early 2024.
- **44.8 percent** of Snapchat's ad audience in Saudi Arabia was **female**, while **53.6 percent** was **male**.



X X USERS

- X had **16.84 million** users in Saudi Arabia in early 2024.
- the company's own data indicated that **42.0 percent** of X's ad audience in Saudi Arabia was **female**, while **58.0 percent** was **male**.

Note: However, it's worth noting that X infers its users' gender, by analyzing signals such as the name that users enter in their profile, and their broader activity on the platform.

Moreover, analysis suggests that X's inferences may not be particularly reliable in determining users' gender, especially in countries where English is not the dominant language.



6 DIGITAL HEATH JAN 2024

DIGITAL HEALTH TREATMENT & CARE OVERVIEW

NUMBER OF PEOPLE USING DIGITAL HEALTH TREATMENT & CARE



11.32
MILLION

YEAR-ON-YEAR CHANGE IN USERS OF DIGITAL TREATMENT & CARE



+5.6
+600 THOUSAND

TOTAL ANNUAL VALUE OF THE DIGITAL TREATMENT & CARE MARKET (USD ,2023)



\$412.8
MILLION

YEAR-ON-YEAR CHANGE IN MARKET VALUE: DIGITAL TREATMENT & CARE MARKET



+2.9%
+\$12 MILLION

AVERAGE ANNUAL VALUE PER USER: DIGITAL TREATMENT & CARE (USD ,2023)



\$36.48

ONLINE DOCTOR CONSULTATIONS OVERVIEW JAN 2024

NUMBER OF PEOPLE USING
ONLINE DOCTOR
CONSULTATION SERVICES



1.25
MILLION

YEAR-ON-YEAR CHANGE IN USER
OF ONLINE DOCTOR
CONSULTATION SERVICES



+%6.8
80 THOUSAND

TOTAL ANNUAL VALUE OF
ONLINE
DOCTORS CONSULTATION
SERVICE



\$143.9
MILLION

YEAR-ON-YEAR CHANGE IN MARKET
VALUE ONLINE DOCTOR
CONSULTATIONS



+%11.7
+\$15 MILLION

AVERAGE ANNUAL VALUE PER
USER :ONLINE
DOCTOR CONSULTATIONS
(USD ,2023)

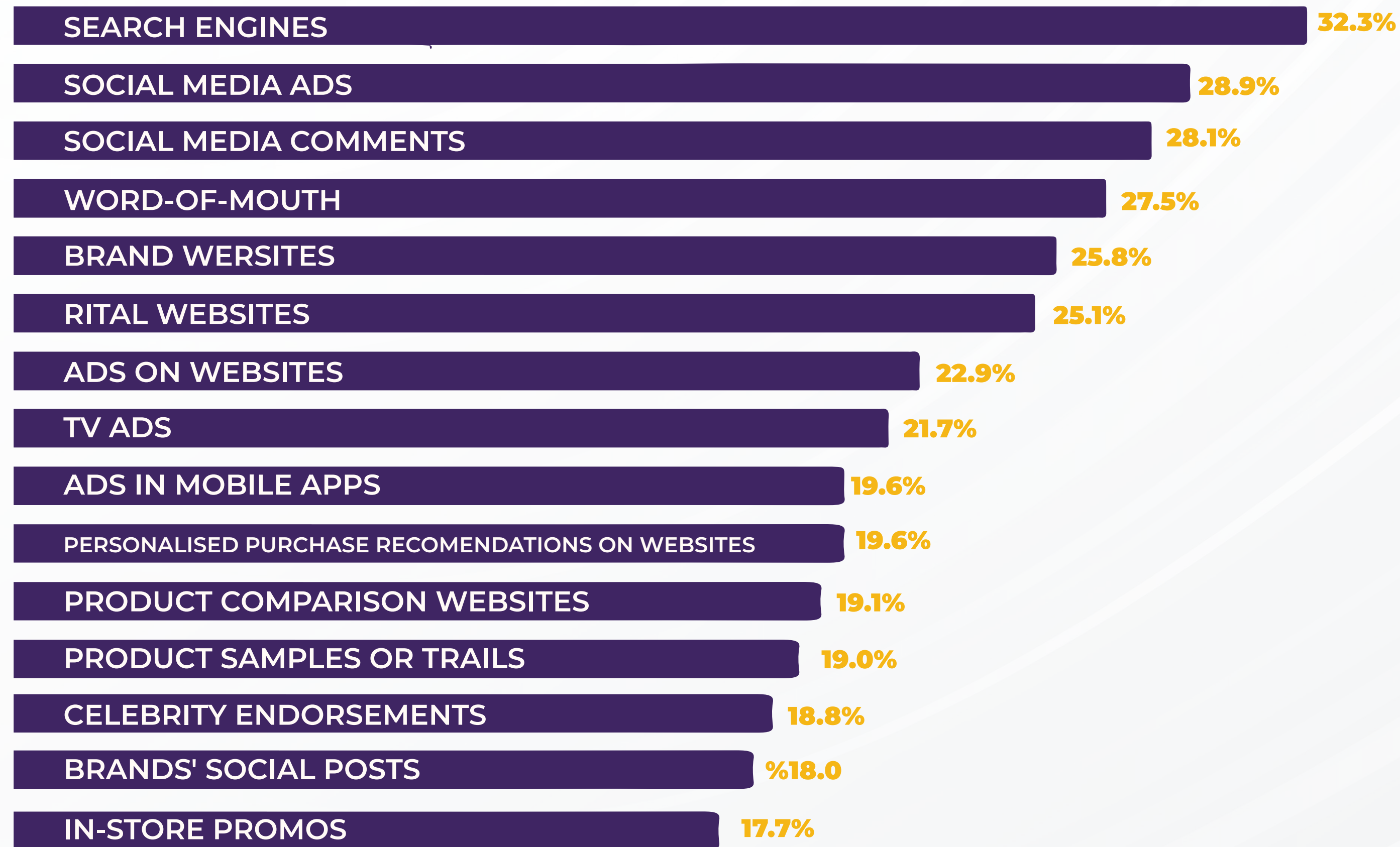


\$115

Beyond having a well-established healthcare system, Saudi Arabia is the biggest digital health market across Gulf Cooperation Council countries. Digital healthcare in the kingdom holds the potential to expand into new avenues of services, like online pharmacy, and improve the current healthcare system overall. With convenience and time efficiency being the main motivations behind adoption, the number of digital healthcare users in Saudi Arabia was forecast to exceed 25 million by 202

7 SOURCES OF BRAND DISCOVERY JAN 2024

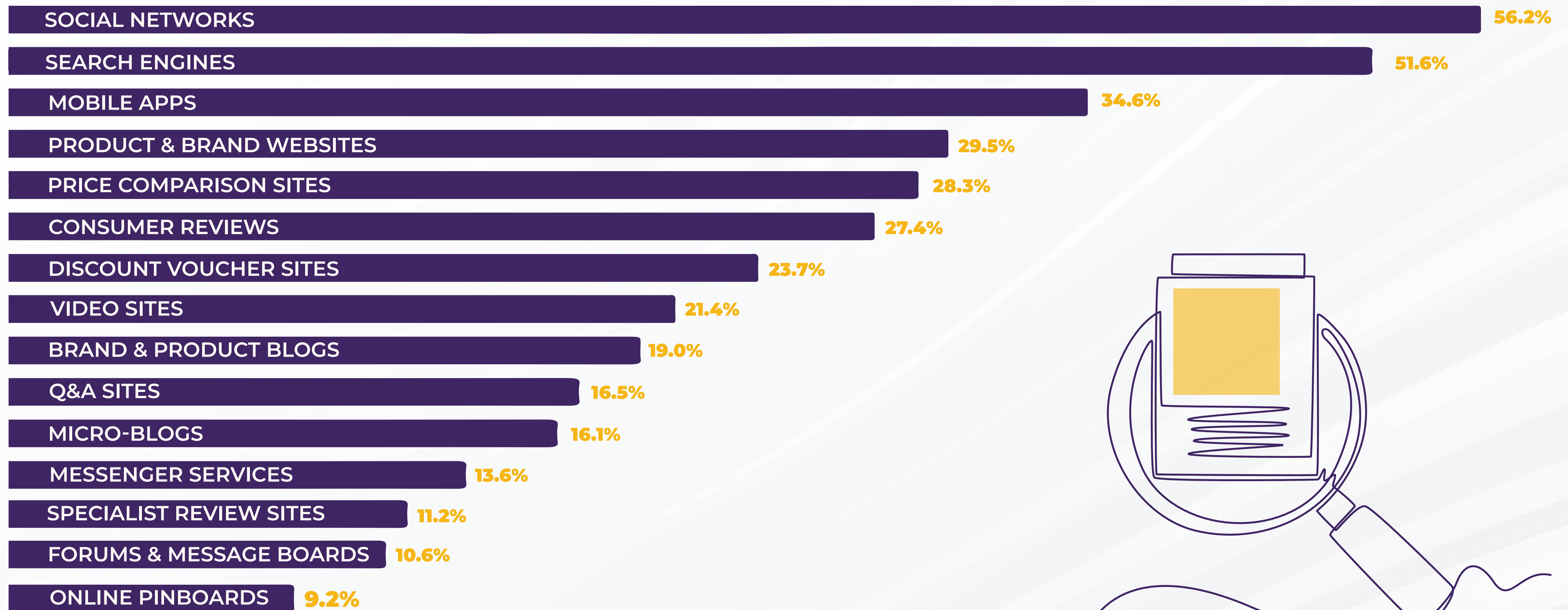
PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO DISCOVER NEW BRANDS, PRODUCTS, AND SERVICES VIA EACH CHANNEL OR MEDIUM





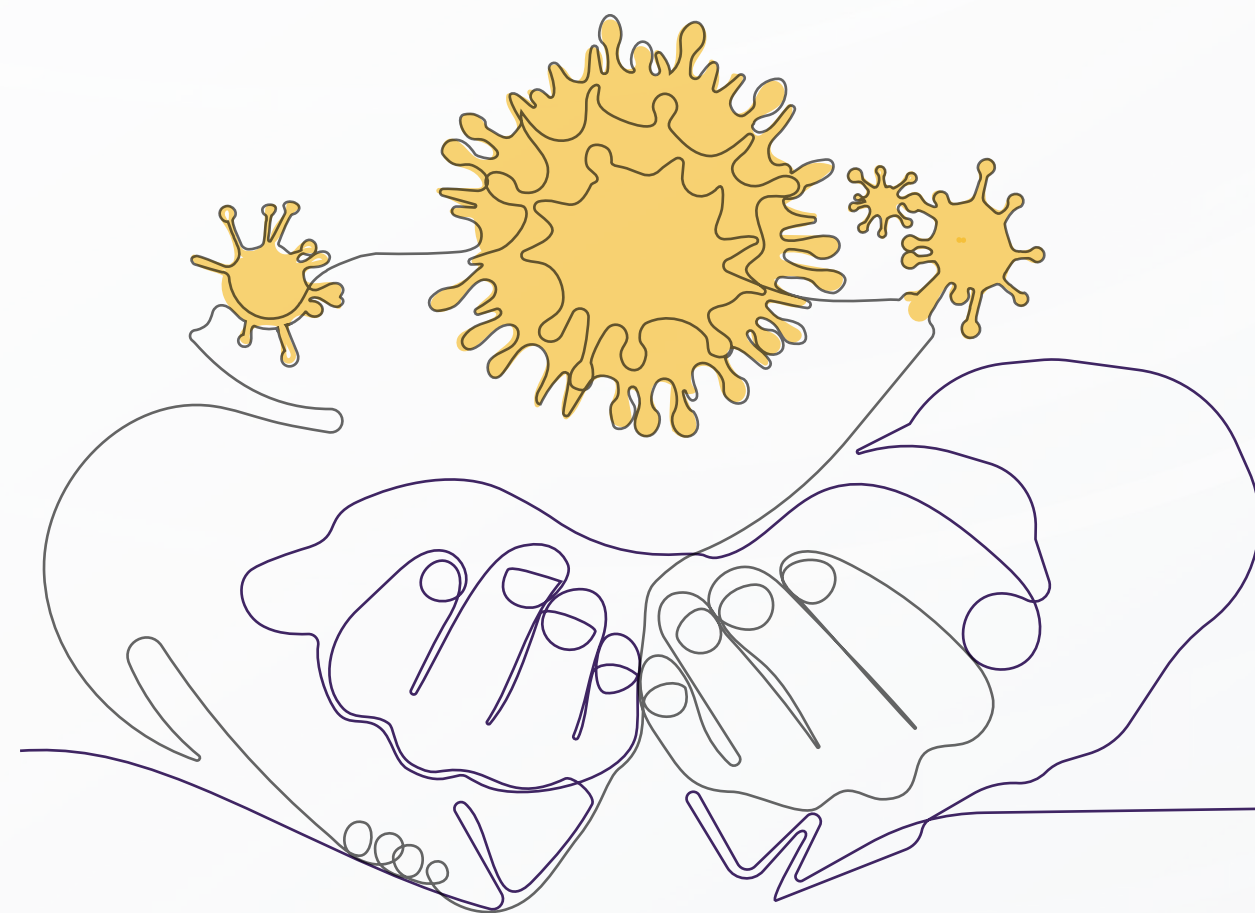
MAIN CHANNELS FOR ONLINE BRAND RESEARCH **JAN 2024**

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH CHANNEL AS A PRIMARY SOURCE OF INFORMATION WHEN RESEARCHING BRANDS





9 DISEASES IN SAUDI ARABIA



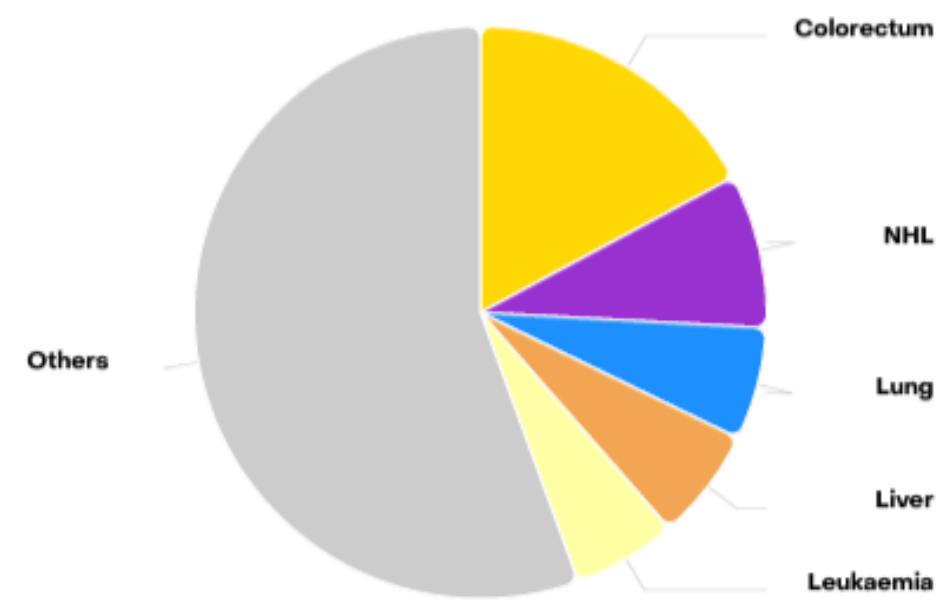
NCDs	NUMBER	DATA SOURCE
DIABETES	2,189,963	SAUDI ARABIA HOUSEHOLD HEALTH SURVEY 2017 (PREVALENCE OF %8 AND UTILIZATION RATE OF %80)
CANCER	68,436	SAUDI ARABIA HOUSEHOLD HEALTH SURVEY 2017 (PREVALENCE OF %0.2 AND UTILIZATION RATE OF %100)
CHRONIC RESPIRATORY DISEASES	603,609	M AL GHOBAIN, 2015 (PREVALENCE OF %4.2 AND UTILIZATION RATE OF %42)
MYOCARDIAL INFARCTION	242,949	SAUDI ARABIA WORLD HEALTH SURVEY 2019 (PREVALENCE OF %1 AND UTILIZATION RATE OF %71)
STROKE	85,203	SAUDI ARABIA WORLD HEALTH SURVEY 2019 (PREVALENCE OF %0.3 AND UTILIZATION RATE OF %83)
HEART FAILURE	284,011	SAUDI ARABIA WORLD HEALTH SURVEY 2019 (PREVALENCE OF %1 AND UTILIZATION RATE OF %83)
HYPERTENSION	2,272,086	SAUDI ARABIA WORLD HEALTH SURVEY 2019 (PREVALENCE OF %8 AND UTILIZATION RATE OF %80)



5 MOST FREQUENT CANCERS

Top 5 most frequent cancers**

Males

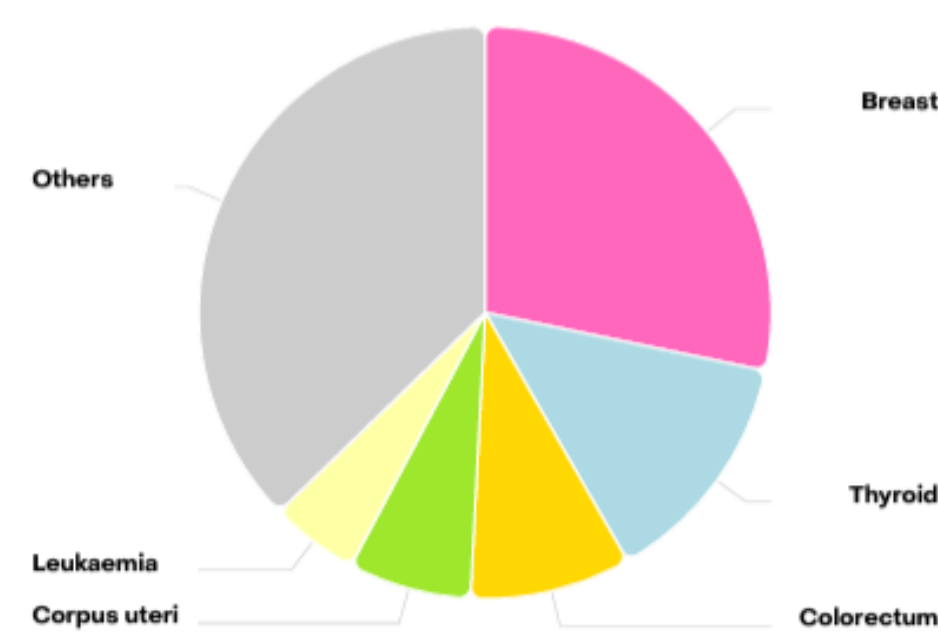


Total: 14 745

Rank	Cancer site	Number of cases	Percent
1st	Colorectum	2 532	17.2%
2nd	NHL	1 280	8.7%
3rd	Lung	939	6.4%
4th	Liver	934	6.3%
5th	Leukaemia	869	5.9%
-	Others	8 191	55.6%

Number of new cases in 2022, males, all ages

Females

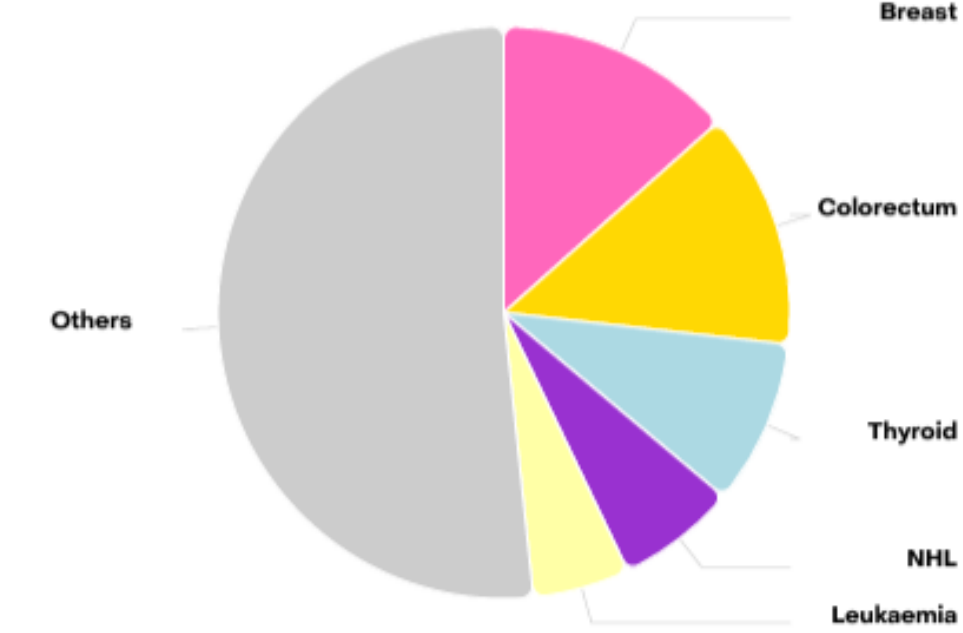


Total: 13 368

Rank	Cancer site	Number of cases	Percent
1st	Breast	3 777	28.3%
2nd	Thyroid	1 799	13.5%
3rd	Colorectum	1 218	9.1%
4th	Corpus uteri	928	6.9%
5th	Leukaemia	669	5.0%
-	Others	4 977	37.2%

Number of new cases in 2022, females, all ages

Both sexes



Total: 28 113

Rank	Cancer site	Number of cases	Percent
1st	Breast	3 777	13.4%
2nd	Colorectum	3 750	13.3%
3rd	Thyroid	2 618	9.3%
4th	NHL	1 909	6.8%
5th	Leukaemia	1 538	5.5%
-	Others	14 521	51.7%

Number of new cases in 2022, both sexes, all ages



10- HOSPITALS NUMBERS

The country has seen a consistent rise in the number of hospitals in the past decade, Out of 27,718 health facilities in Saudi Arabia, Riyadh has 7,760 health facilities which is the highest, followed by Makkah with 6,154 health facilities. Northern Borders Region has the lowest population with 400 health facilities. 3,775 of these health facilities have a 5-star rating.

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ADDITIONAL INFORMATION ABOUT HEALTH IN SAUDI ARABIA DIGITAL TRANSFORMATION

%100

of Newborn immunizations are
Electronically documented

+9.2 MILLION

Virtual Appointment

+30 MILLION

Beneficiaries of sehhhaty
Application

+14 MILLION

Beneficiaries linked to the
unified health file (NPHIES)

PREVENTION FIRST

+5 MILLION

Early obesity screening

+1 MILLION

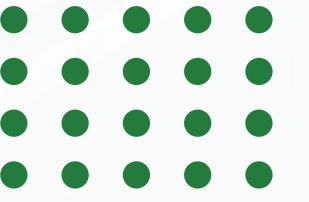
Early diabetes tests

+100.000

Early colon cancer screening

+200.000

Early breast cancer screening



AVERAGE HUMAN LIFE EXPECTANCY HAS INCREASED **77.6 YEARS 2023**

HOME CARE

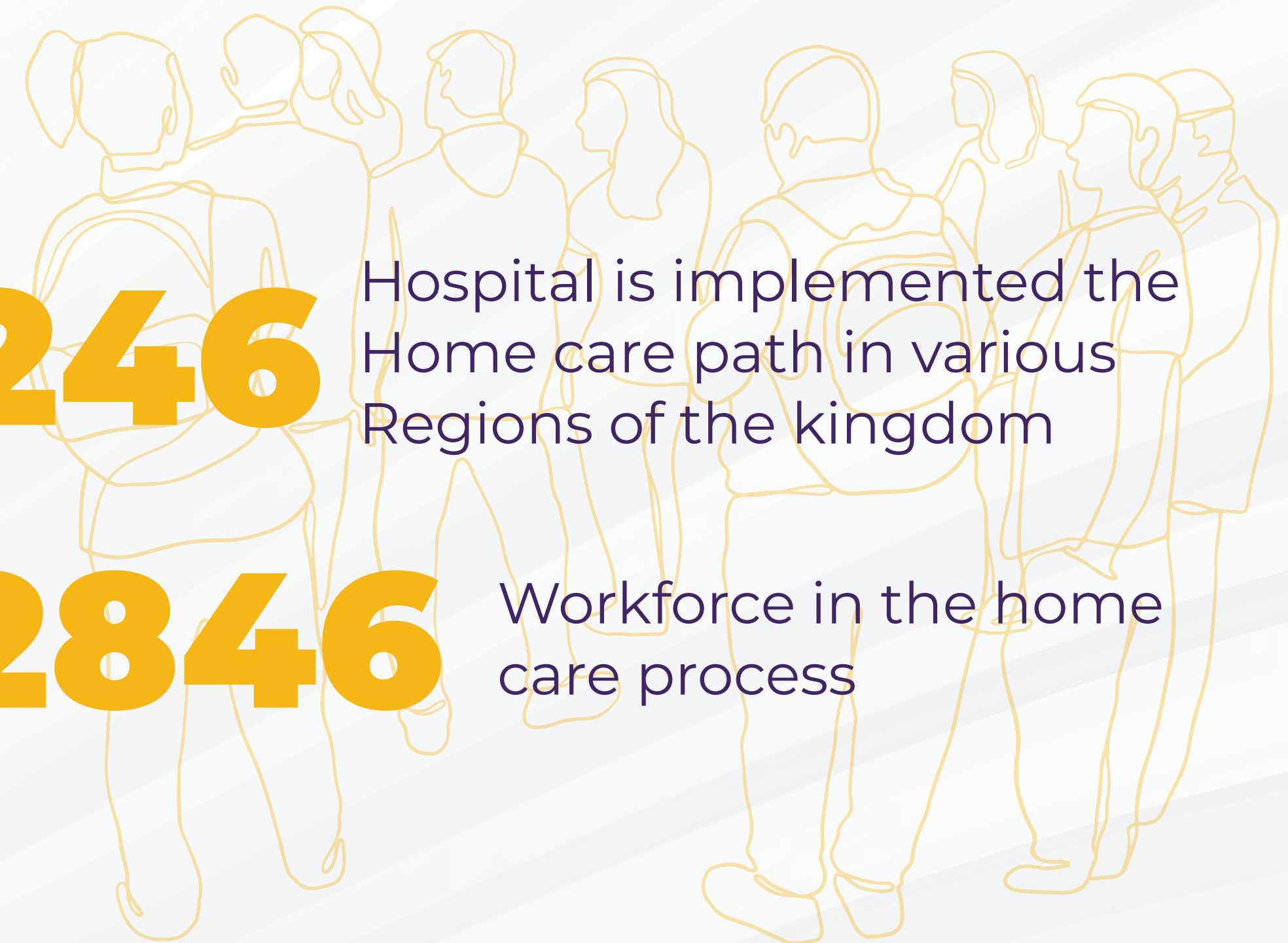
The kingdom's transformed healthcare model ensures citizens are able receive expert care in the comfort of their own homes

+1M Visits since proces

+68.000 Beneficiaries of the home care process

246 Hospital is implemented the Home care path in various Regions of the kingdom

2846 Workforce in the home care process





KEY SERVICES

- Nursing care
- Medical care
- Nutrition Services
- Mental Health
- Respiratory care
- Social Services
- Rehabilitation and physiotherapy
- Medicine Management



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RESOURCES



THANK YOU