

CX & Digital Transformation

Saudi Arabia Market Overview & Trends



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Saudi Arabia Is Entering an Outcome-Led CX Cycle

Digital scale, AI, cloud, payments, and sector reform are converging into a high-growth market for integrated experience platforms.

15.6% of GDP

Digital economy value in 2025; equal to 15.6% of GDP

19.7%

Projected Saudi CXM CAGR from 2025 to 2032

USD 746.7M

Expected Saudi CXM market size by 2032

85%

Electronic payments share of total retail payments in 2025

99%

Internet penetration enabling mobile-first service delivery

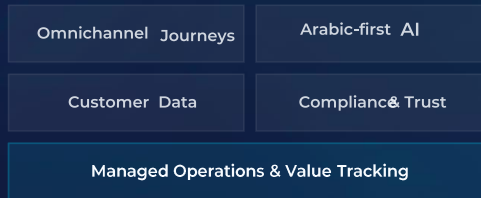
GROWTH ENGINES

- Vision 2030 transformation**
Service redesign, journey governance, and public-service quality.
- AI investment**
Arabic conversational AI, agent assist, personalization, and analytics.
- Cloud expansion**
Cloud contact centers, CRM modernization, and customer data platforms.
- Payments digitization**
Digital onboarding, loyalty, fraud-aware journeys, and embedded finance.
- Sector reform**
Government, BFSI, telecom, retail, and health need repeatable accelerators.

MARKET OVERVIEW

CX as Digital Infrastructure

Saudi organizations are moving from digitized channels toward integrated, Arabic-first, AI-enabled, measurable experience platforms.



SECTOR OPPORTUNITY MAP

- Government**
Beneficiary analytics, interoperable journeys, standards-led service quality.
 - Banking**
Digital onboarding, personalization, fraud-aware CX, embedded finance.
 - Telecom**
5G self-care, IoT alerts, cloud CX platforms, edge operations.
 - Retail**
Omnichannel discovery, payment data, loyalty, service automation.
 - Healthcare**
Virtual care access, patient journeys, triage, scheduling, and follow-up communication.
- Winning providers package strategy, platforms, localization, and managed delivery into measurable outcomes.

HOW TO WIN

- Lead with outcomes**
Tie CX to effort, adoption, productivity, retention, and trust.
- Build Arabic-first AI**
Localize bots, agent assist, knowledge, and governance.
- Package managed services**
Operate, optimize, train, and measure beyond launch.
- Create sector accelerators**
Reuse journeys for public services, finance, retail, telecom, and health.
- Prove value dashboards**
Make performance visible for executive scale decisions.

Sources: CST, GASTAT; Fortune Business Insights; U.S. International Trade Administration; DGA; SAMA; MOH; Vision 2030.

Disclaimer: The information is based on secondary research from authentic government websites and global entities. The detailed report is available on demand by contacting the X-SHIFT Marketing team.

Saudi Arabia is entering an outcome-led CX cycle



The Saudi Arabian CX and Digital Transformation landscape is influenced by the digital scale of the nation, fast adoption of AI and the cloud, digitization of payments, maturity of government sector, and modernizing sector services.

MARKET VIEW

CX is becoming digital infrastructure: Organizations are requiring end-to-end CX journeys, Arabic-first CX automation, customer intelligence, cloud platforms, and transformation services.

15.6% of GDP

Digital economy scale

As per CST and GSTAT, the Saudi Digital Economy accounts for 15.6% of Saudi Arabia's GDP and ICT market reaches to SAR 180B.

19.7%

CXM growth outlook

A third-party market report forecasted Saudi CXM market growth at a CAGR of 19.7%, reaching USD 746.7M in 2032.

5 sectors

Broad adoption base

Government, banks, telecom, retail, and healthcare sectors reveal notable CX modernization needs in digital services, payments, connectivity, commerce, and tele healthcare.

2026–28

Buyer expectations shift

The market is shifting from channel digitization to AI-based operations, measurable experience delivery, and continuous optimization.

STRATEGIC IMPLICATION

Leading vendors need to build their strategies around measurable outcomes for their businesses such as faster service, self-service, lower costs to serve, better retention rates, building trust, and executive value delivery.

Saudi Arabia is ready for scaled digital CX

The infrastructure readiness facilitates mobile first, always on customer journey.

In Saudi Arabia, there is very high connectivity because of its high mobile penetration rates, 5G implementation, and the highest rated ICT services in the world. In this regard, digital services in Saudi Arabia depend not on accessibility but on their quality.

#1

Ranking in the ITU ICT Development Index for 2025, based on CST.

99%

Percentage Internet usage from the U.S. International Trade Administration.

212%

Mobile subscriptions relative to the population, per CST.

5G Network

In 2025, Saudi Arabia accelerated nationwide 5G coverage through expanded operator networks, 600 MHz low-band deployment, and CST's 2025-2027 spectrum strategy.

CX implication: The next frontier for competition will be the quality-of-service experience rather than digital access itself.

ICT, CX, AI, and cloud expand together

The advantage of Saudi Arabia is not just one type of technology but a combination of digital economic scale, ICT infrastructure, AI capabilities, cloud computing, and customer experience management.

DIGITAL ECONOMY SIZE

~15.6% of GDP

Value creation from digital economy in 2025 will contribute to 15.6% of the GDP.

ICT SECTOR

~USD 48B

Value of Saudi ICT industry in May 2025 accounts for more than 4% of GDP.

AI & CLOUD COMPUTING

USD 2.1B
AI by 2027

AI expenditure will reach to \$2.1B in 2027. Cloud expenditure is estimated at more than \$5B by 2027.

CXM MARKET

USD 746.7M

Estimated market size of Saudi Arabia customer experience management by 2032.

CORE IMPLICATION

CX demand increases when ICT scale, AI adoption, cloud computing, and sector digitization become mutually reinforcing investments.

CX market growth moves mainstream

The Saudi Arabian CXM market will be growing fast due to the change in focus from channel digitization to data-driven, AI-powered experience orchestration.

Customer experience management is turning into its own category

According to Fortune Business Insights, rapid growth in Saudi Arabia CXM will be facilitated by factors such as digitalization, governmental support, investments in AI and machine learning, cloud technology, the increase in tourism in Saudi Arabia, and increasing customer expectations.

AI / ML

Cloud CX

Omnichannel

Analytics

2024

USD 181.2M

Estimated Saudi CXM market value.

2025

USD 212.2M

Projected market value as adoption accelerates.

2032

USD 746.7M

Expected revenue size suggests plenty of room for growth in CX platforms and solutions.

19.7%

Projected CAGR for period between 2025 and 2032. Growth trends will drive investments in customer data platforms, cloud-based contact centers, Arabic AI assistants, and CX management.

GROWTH DRIVERS

Vision, digital demand, and AI are reinforcing each other



The market is shifting from digitization to experience orchestration.

The CX opportunity that Saudi Arabia offers is not a result of any one technological trend. The opportunity arises from the synergistic impact of national transformation objectives, connectivity, investment in artificial intelligence and cloud computing, cashless transactions, and transformation in key service sectors.

This leads to increased demand for omnichannel platforms, Arabic AI assistants, customer data layers, service analytics, and managed transformation services.

MARKET EFFECT

CX PRIORITY

1

Vision 2030 transformation

Digital capability is linked to diversification, public-service quality, and national competitiveness.

Service redesign, journey governance, and digital operating models.

2

AI investment

ITA projects AI spending above USD 800M in 2025 and USD 2.1B by 2027.

Arabic conversational AI, agent assist, personalization, and analytics.

3

Cloud expansion

Cloud spending is expected to exceed USD 5B by 2027, enabling scalable platforms.

Cloud contact centers, CRM modernization, and customer data platforms.

4

Payments digitization

Electronic payments reached 85% of retail payments in 2025, according to SAMA.

Digital onboarding, payments-linked loyalty, fraud controls, and commerce CX.

5

Sector reform

Government, healthcare, retail, banking, and telecom are modernizing service delivery.

Industry-specific accelerators for government services, virtual health, and omnichannel retail.

Winning providers will package technology with measurable outcomes: faster service, higher adoption, lower operating cost, better trust, and continuous improvement.

Government digital services are maturing fast

DGA's Measurement Results for 2025 demonstrate that transformation within the Saudi public sector is gradually becoming more dependent on standards, compliance, quality of services, and beneficiary experience.

88.30%

Digital Transformation Measurement Index in 2025

According to the Digital Government Authority, the index increased to 88.30% from the previous year, which shows a steady trend in the maturation of digital transformation in government agencies.

Index progress shown as reported 2025 maturity level.

244+

Government agencies measured

The wide scope of agencies requires the need to have standards regarding how services should be governed and the operations of CX.

95

Updated standards applied

Standards encompass technical, regulatory, integration, and operational aspects, making digital services more consistent.

#4

Global e-government rank cited by DGA

According to DGA, Saudi Arabia is the fourth in the UN E-Government Development Report 2024.

Public-sector CX opportunity areas

Beneficiary experience analytics: measure service satisfaction, bottlenecks, and journey completion across channels.

Interoperable service journeys: integrate agencies, identity, payments, notifications, and case management.

Efficiency-led redesign: link service quality, spending efficiency, and performance monitoring to operational KPIs.

Payments digitization redefines financial CX

OFFICIAL SAMA SIGNAL

Cashless behavior is the new norm for retail experiences, thus changing the role of the banks from transactional to experiential..

As the volume of transactions increases, the banks must ensure seamless onboarding, enhanced security, real-time assistance, personalization, and consistency in their journey design across all channels.

85%

Electronic payments share of total retail payments in 2025. [5]

14.6B e-transactions

Electronic transactions in 2025, up from 12.6B in 2024. [5]

79% → 85%

SAMA reported that electronic payments increased from 79% of total retail payments in 2024 to 85% in 2025, supported by national payment systems including mada, POS, and e-commerce payments [5]

DIGITAL ONBOARDING
REDUCE FRICTION WHILE PRESERVING COMPLIANCE AND TRUST.

FRAUD-AWARE CX
BLEND SECURITY CONTROLS WITH LOW-EFFORT JOURNEYS.

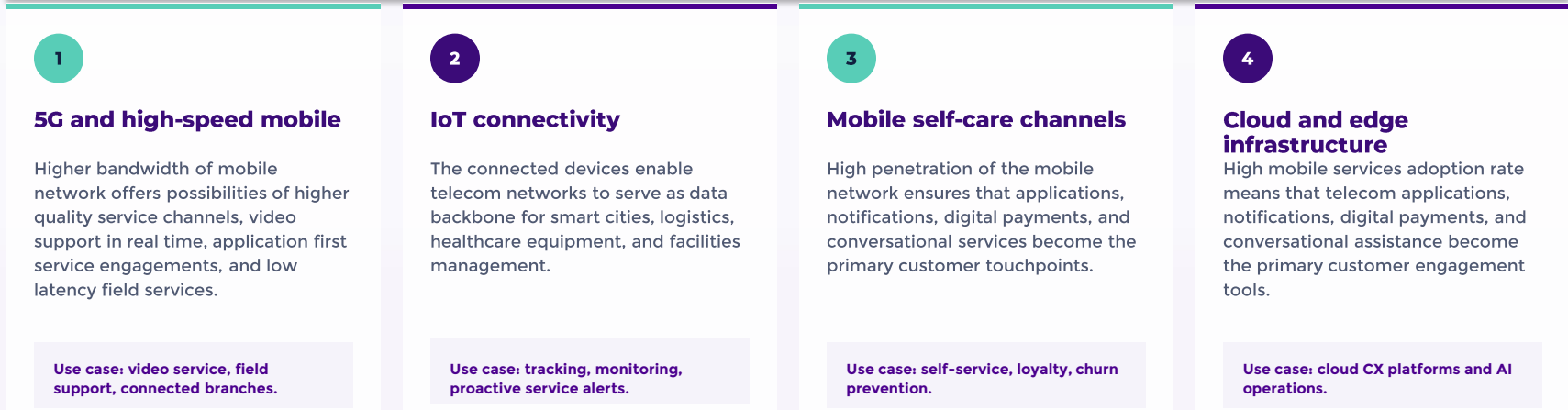
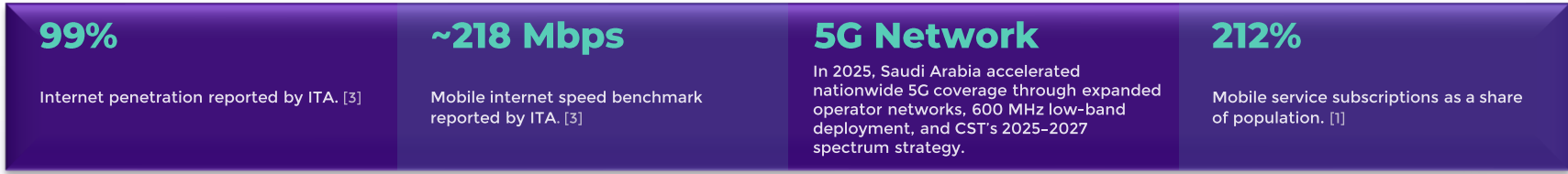
PERSONALIZATION
USE PAYMENT DATA TO IMPROVE RELEVANCE AND RETENTION.

EMBEDDED FINANCE
EXTEND BANKING CX INTO RETAIL AND MERCHANT ECOSYSTEMS.

Connectivity becomes an experience platform



Telecommunications companies are moving from being connectivity providers to enabling mobile first services, IoT, cloud services, digital identities, and CX managed services.



CX implication: telecom is becoming a cross-sector experience backbone, enabling richer digital services for government, banking, retail, healthcare, smart cities, and managed services.

E-commerce creates omnichannel demand



RETAIL CX THESIS Saudi Arabian retail industry is moving from store-led transactions to connected journeys that combine mobile discovery, digital payments, e-commerce, loyalty, fulfillment, and automated service.

BROADER DIGITAL MARKET SIZE

USD 27.96B

The overall Saudi Arabia e-commerce market size in 2025 is valued at USD 27.96 billion according to structural tracking indices by [Mordor Intelligence](#).

HEADROOM REMAINS

6.4%

E-commerce share of a USD 95B retail market, indicating room for further omnichannel penetration.

E-COMMERCE SALES

SAR 30.7 (~USD 8.17) Billion

As per SAMA report, Saudi e-commerce sales surge 68% to over SR30 billion in October 2025

DISCOVERY

Get personalized mobile, web, social, and marketplace experiences.

PAYMENT

85% of the electronic retail payments create data-rich, low-friction checkout journeys [\[5\]](#)

LOYALTY

Payments and commerce data can power segmentation, offers, and retention.

SERVICE

AI-assisted support, order visibility, returns, and proactive notifications raise CX quality.

Virtual care is scaling patient experience

The healthcare transformation in Saudi Arabia is now becoming more oriented towards accessibility and omnichannel services, where Seha Virtual Hospital serves as an example.



MOH DIGITAL HEALTH SIGNAL

Seha Virtual Hospital turns specialist access into a national digital service layer.

Seha Virtual Hospital has been described by the Ministry of Health as one of the most important achievements in healthcare transformation, an integrated model of virtual healthcare services.. [6]

ACCESS

937 and Sehhaty App

CARE

Virtual specialty services

EXPERIENCE

Connected patient journeys

242+

Hospitals supported

MOH states the virtual hospital supports more than 242 hospitals across the care network.

48

Main specialties

Coverage spans 48 main specialties and 68 sub-specialties, expanding virtual access to expertise.

597K+

Annual capacity

Operational capacity exceeds 597,000 beneficiaries annually, creating measurable digital care scale.

3

Key engagement channels

Patient access includes 937, Sehhaty App, and X Platform, reinforcing omnichannel healthcare CX.

CX opportunity

With the help of virtual care journeys and AI-powered services, healthcare providers can ensure improved access, scheduling, teleconsultations, triaging, follow-ups, and communications.

Shared trends, different sector expressions

There are many common themes when it comes to transformation in Saudi Arabia's key industries, but how each of those is adopted will vary depending on regulation, customer journey, sensitivity of data, and the delivery model.

TREND	Government	Banking	Telecom	Retail	Healthcare
Omnichannel CX	UNIFIED SERVICES Beneficiary journeys across portals, apps, contact centers, and agency workflows.	APP + BRANCH Mobile banking, contact center, card, merchant, and branch journey integration.	SELF-CARE App-led support, digital onboarding, usage alerts, and field-service coordination.	COMMERCE BLEND Store, app, web, payments, loyalty, and service recovery connected.	CARE ACCESS 937, Sehhaty, virtual care, appointments, and follow-up pathways.
AI and automation	SMART SERVICES Case routing, eligibility checks, proactive notifications, and service triage.	RISK + SERVICE Fraud detection, agent assist, next-best action, and automated support.	OPS AUTOMATION Network intelligence, churn prediction, and customer-care automation.	PERSONALIZATION Recommendations, promotions, service bots, and demand forecasting.	CLINICAL SUPPORT Virtual triage, patient navigation, scheduling, and operational prioritization.
Data platforms	BENEFICIARY INSIGHT Service analytics, satisfaction measurement, and performance monitoring.	CUSTOMER 360 Payments, products, risk, complaints, and retention signals.	USAGE INTELLIGENCE Subscriber behavior, service quality, location, and network experience data.	LOYALTY DATA Commerce, payments, stock, returns, and customer lifetime value.	PATIENT INSIGHT Care pathways, virtual access, referrals, outcomes, and utilization.
Cloud adoption	SHARED PLATFORMS Reusable services, integration layers, and scalable digital government capabilities.	SCALABLE BANKING Elastic channels, digital onboarding, analytics, and resilient service operations.	EDGE + CORE Cloud, edge, IoT enablement, and managed service infrastructure.	COMMERCE STACK E-commerce platforms, CRM, marketing automation, and service tools.	VIRTUAL CARE Telehealth platforms, patient access systems, and distributed care workflows.
Trust and security	DIGITAL IDENTITY Secure access, consent, privacy, and inter-agency data governance.	FRAUD CONTROLS Authentication, transaction monitoring, privacy, and compliance-led CX.	RESILIENCE Network reliability, cybersecurity, identity, and service continuity.	PAYMENT TRUST Secure checkout, returns, loyalty integrity, and customer protection.	HEALTH PRIVACY Patient data protection, clinical governance, and trusted virtual access.

STRATEGIC READ

It is important to note that there is no one-size-fits-all CX model – it is a universal digital infrastructure customized for specific industries.

From projects to platforms



The Saudi organizations are shifting from stand-alone digital projects to experience platforms where all aspects of advisory, implementation, operations, analytics, and optimization are brought together.

PROJECT MODE

Point solutions and episodic delivery

In the past, transformations have been channel-focused, portal-focused, mobile application-focused, CRM module-focused, or process automation focused, where each one has been a separate project.



OPERATING MODEL
SHIFT

PLATFORM MODE

Integrated CX and managed transformation

The stronger model links customer data, omnichannel service, AI automation, governance, compliance, and managed services into a repeatable platform for measurable experience outcomes.

1

CX strategy and journey redesign

Define experience blueprints, service standards, governance, and operating models tied to measurable outcomes.

2

Omnichannel contact centers

Integrate voice, chat, WhatsApp, app, social, self-service, case management, and service analytics.

3

AI-enabled service

Apply Arabic bots, agent assist, predictive routing, and analytics as AI spending scales through 2027.

4

Managed transformation services

Provide continuous operations, optimization, training, governance, and value tracking beyond launch.

Market implication: vendors should compete on measurable CX outcomes and operating capability, not only software implementation or isolated digital channels.

MARKET BARRIERS

Regulation, integration, and talent are key barriers



The CX and digital transformation market in Saudi Arabia is highly appealing, but success in implementation requires dealing with issues such as compliance, cybersecurity, localization, legacy systems, and execution capabilities.

BARRIER STACK

For market participants, the challenge is not demanding creation; it is reliable, compliant, and scalable delivery.

01 Data privacy, AI regulation, and localization requirements

02 Cybersecurity exposure and trust-sensitive digital journeys

03 Public procurement complexity and long decision cycles

04 Legacy integration across channels, workflows, and data layers

05 Talent constraints in AI, cloud, CX analytics, and change management

REGULATORY RESPONSE

Design for Saudi compliance from day one

Apply Saudi compliance in hosting, data architecture that includes privacy by design, data management, and documented control for AI, customer data, and cross-border data flows.

TRUST RESPONSE

Embed security into the CX layer

Treat identity, access, monitoring, fraud controls, and cyber resilience as part of the service experience, not as back-office controls.

DELIVERY RESPONSE

Reduce procurement and integration risk

Build local references, partner ecosystems, reusable accelerators, API-led modernization, and phased migration roadmaps.

CAPABILITY RESPONSE

Combine platforms with managed services

Sustain adoption through training, knowledge transfer, continuous optimization, and managed CX operations rather than one-time implementation.

STRATEGIC IMPLICATION

The winning model is locally compliant, integration-led, and capability-building; this turns market barriers into defensible competitive advantages.

Compete on measurable experience outcomes



The market actors need to frame CX transformation as a metrics-driven performance practice rather than merely technology deployment, channel digitalization, or contact center optimization.

WINNING PROPOSITION Leverage industry knowledge, Saudi-compliant systems, Arabic-first AI, and managed operations for speed, adoption, reduced effort, trust-building, and demonstrable ROI.

ACTION

<p>1</p> <p>Lead with outcomes</p> <p>Anchor proposals in customer effort, resolution time, adoption, retention, cost-to-serve, and trust metrics.</p> <p>Outcome: clearer business cases and executive sponsorship.</p>	<p>2</p> <p>Build Arabic-first AI</p> <p>Prioritize Arabic conversational AI, agent assist, knowledge automation, compliance guardrails, and local service contexts.</p> <p>Outcome: higher automation relevance and adoption.</p>	<p>3</p> <p>Package managed services</p> <p>Move beyond go-live delivery into continuous operations, optimization, training, governance, and value tracking.</p> <p>Outcome: sustained capability and lower execution risk.</p>	<p>4</p> <p>Create sector accelerators</p> <p>Develop reusable journeys for government services, digital payments, telecom self-care, retail commerce, and virtual care.</p> <p>Outcome: faster deployment and stronger differentiation.</p>	<p>5</p> <p>Prove value through dashboards</p> <p>Make performance visible through executive dashboards that link CX, operations, adoption, and financial outcomes.</p> <p>Outcome: confidence to scale and renew programs.</p>
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<p>VALUE DASHBOARD METRICS</p>	<p>Customer effort</p> <p>Completion rate, journey friction, repeat contact.</p>	<p>Service productivity</p> <p>AHT, first-contact resolution, automation containment.</p>	<p>Digital adoption</p> <p>Self-service usage, app engagement, channel migration.</p>	<p>Business value</p> <p>Cost-to-serve, retention, revenue uplift, compliance confidence.</p>
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Build an outcome-led CX operating model



Step two involves translating the market opportunity into an execution strategy focused on aligning the leaders, platform modernization, scale of AI-powered services operations, and continuous proof of value.

1

Align

0-90 DAYS

Determine priority journeys, customer experience goals, governance framework, data ownership, compliance needs, and value metrics before technology deployment.

Output: executive CX charter, journey roadmap, KPI baseline, and business case.

2

Build

3-9 MONTHS

Modernization of Customer Data, CRM, Contact Center, Digital Channels, Integration Layers, and Arabic Knowledge Automation in Selected Journeys.

Output: integrated platform foundation and priority journey release.

3

Scale

9-18 MONTHS

Expansion of AI-Assisted Service, Self-Service, Proactive Notifications, Sector Accelerators, and Operating Workflows.

Output: measurable adoption, productivity, resolution, and satisfaction improvement.

4

Optimize

18+ MONTHS

Transition from Implementation to Managed Performance, Continuous Improvement, Advanced Analytics, Governance Reviews, and Value Dashboards Reporting.

Output: sustainable CX transformation and renewal-ready ROI evidence.

OPERATING PRINCIPLE

Treat CX transformation as a managed performance system, not a one-time digital project: assign owners, govern data, measure outcomes, localize AI, and optimize journeys continuously.

CX becomes AI-driven and outcome-led



It is predicted that Saudi Arabia's next CX cycle will shift from channel modernization towards operations through AI and experience outcomes, driven by national digital scale, cloud adoption, digital payments, and industry transformation.

2026 FOCUS

Omnichannel modernization

Organizations continue integrating apps, portals, contact centers, payments, self-service, and service workflows into more consistent customer and beneficiary journeys.

BUYER PRIORITIES

Journey redesign and service governance

Cloud contact centers and CRM modernization

Customer data foundations and analytics

Evidence anchors: CST digital economy/ICT scale, DGA maturity, SAMA 85% retail e-payments.

2027 FOCUS

AI operations at scale

AI shifts from pilots to operating models, with Arabic conversational automation, agent assist, predictive routing, and real-time analytics embedded into service delivery.

BUYER PRIORITIES

Arabic AI assistants and agent productivity

AI governance, data quality, and security controls

Predictive service and automated case resolution

Evidence anchors: ITA projects AI spending at USD 2.1B and cloud spending above USD 5B by 2027.

2028 FOCUS

Outcome-led experience management

CX programs become continuously managed business systems, with providers accountable for measurable improvements in satisfaction, adoption, cost-to-serve, conversion, and retention.

BUYER PRIORITIES

Experience value dashboards and KPI governance

Managed transformation and continuous optimization

Sector accelerators for government, BFSI, retail, telecom, and health

Evidence anchors: CXM market growth outlook and sector-specific digital service scale across DGA, SAMA, and MOH.

STRATEGIC OUTLOOK

The market shifts from “launching digital channels” to operating intelligent experience systems where success is measured by adoption, trust, productivity, retention, and service quality.

Saudi Arabia is a priority CX transformation market

EXECUTIVE CONCLUSION

The market is ready for outcome-led CX, not incremental digitization.

The Kingdom of Saudi Arabia represents an environment of national digital scale, rapid sector modernization, high connectivity, growing investment in AI and the cloud, and demonstrated customer experience need. The best opportunities lie with those providers who can tie strategy, platform, localization, and managed implementation together.

SAR 495B

Digital economy scale

CST reported a SAR 495B digital economy in 2024, equal to 15% of GDP, alongside SAR 180B ICT market scale.

5 sectors

Broad transformation demand

Government, banking, telecom, retail, and healthcare show visible modernization signals across digital services, payments, connectivity, commerce, and virtual care
[3][4][5][6]

19.7%

CXM growth momentum

Saudi CXM market growth is projected at a 19.7% CAGR from 2025 to 2032, reaching USD 746.7M by 2032.

HOW TO WIN

Compete through measurable experience outcomes: Arabic AI, compliant cloud platforms, customer-data intelligence, sector accelerators, and managed transformation services that continuously improve adoption, satisfaction, efficiency, and trust.

Credible sources used in this report



The market overview uses official Saudi sources where available, supported by international trade publications and third-party market research for CX market sizing.

Official Saudi and public-sector sources

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Market, trade, and design-reference sources

- [2] Fortune Business Insights. Saudi Arabia customer experience management market outlook, including 2024, 2025, 2032 market sizing and projected CAGR used in the CX market growth slide. <https://www.fortunebusinessinsights.com>
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- [8] Grand View Research. Saudi Arabia customer experience management market outlook reviewed as supporting third-party market context for CX demand and category definition. <https://www.grandviewresearch.com>
- [9] ITU / ICT Development Index context. ICT development benchmarking referenced through official Saudi communications and international ICT ranking context. <https://www.itu.int>


CITATION APPROACH

Source numbers in slide footers correspond to this reference register. Quantitative claims are tied to official sources or named market-research providers;

A wide-angle photograph of a city skyline at dusk or dawn. The sky is a mix of orange, yellow, and blue. In the foreground, a large, curved purple graphic element separates the top image from the white content area below. The city features several tall skyscrapers, some with construction cranes, and a large stadium-like structure in the distance.

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