



Global Games Market Report

August 2023 | Free Version



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Foreword

Foreword

We proudly present the free edition of this year's Global Games Market Report, the flagship report of Newzoo's Games Market Reports & Forecasts. This preview version of the report provides a glimpse into the exciting world of gaming in 2023 and beyond.

Overarchingly, 2023 will be an exciting year for the global games market. The number of players will surpass 3.3 billion, with more paying gamers also entering the fold. Moreover, the market will generate a staggering \$187.7 billion, which is an achievement given the many macroeconomic factors at play. After the market swerved in a corrective direction in 2022 following the pandemic, 2023 will see the market grow once again.

Many highly anticipated delayed titles launched in 2023, with more scheduled for release in H2, the supply of new consoles has finally caught up to demand, and console publishers kept embracing live-service strategies to ensure stable growth. In parallel, mobile publishers continue to deal with privacy-related monetization and user-acquisition challenges stemming from Apple and Google's new policies.

Every year sees gaming become more mainstream, and this year is no exception. Since our first report, we've said that gaming is at the heart of the entertainment industry, and it's never been as easy to back up this claim as it is now. Gaming's impact will go beyond the number of players and revenue generated within the scope of the industry. Transmedia strategies have showcased the power of games as a business, and that trend is only accelerating.

Alongside a comprehensive overview of the global games market, this report includes special focus topics and key trends. In the first special focus topic, we use our data to gauge the performance of gaming's most significant transmedia experiments, including prominent examples like The Super Mario Bros. Movie and HBO's The Last of Us. In the second topic, we look at significant trends within the esports and live-streaming markets and provide insights for developers and publishers interested in games as spectacle.

New to this year's report is how we break down revenues per monetization model. Publishers are experimenting with various monetization strategies across every gaming segment, and we can now split in-game revenues into DLC, microtransaction, and in-game subscription revenue on PC and console.

We also continue to expand our player numbers coverage per gaming ecosystem. We first introduced our Steam player estimates in the January Update to cover seven of today's largest gaming ecosystems. Now, we have expanded our coverage to include forecasts for 2023.

This preview version of the Global Games Market Report 2023 will unpack these topics and more. In the complete edition of the report, we dive far deeper into the console and PC live-services boom, the pros and cons of generative AI in game development, complementary gaming device trends, the state of VR (and extended reality), and specific games markets making waves across the world.

All the data in this report is downloadable and available using the Report Data Tools on Newzoo's Platform. You can access the full report via our Games Market Reports & Forecasts.

Thank you for joining us for an exploration of the global games market in 2023. We hope you enjoy reading this report as much as we enjoyed creating it.



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02

Methodology & Terminology

Full report structure

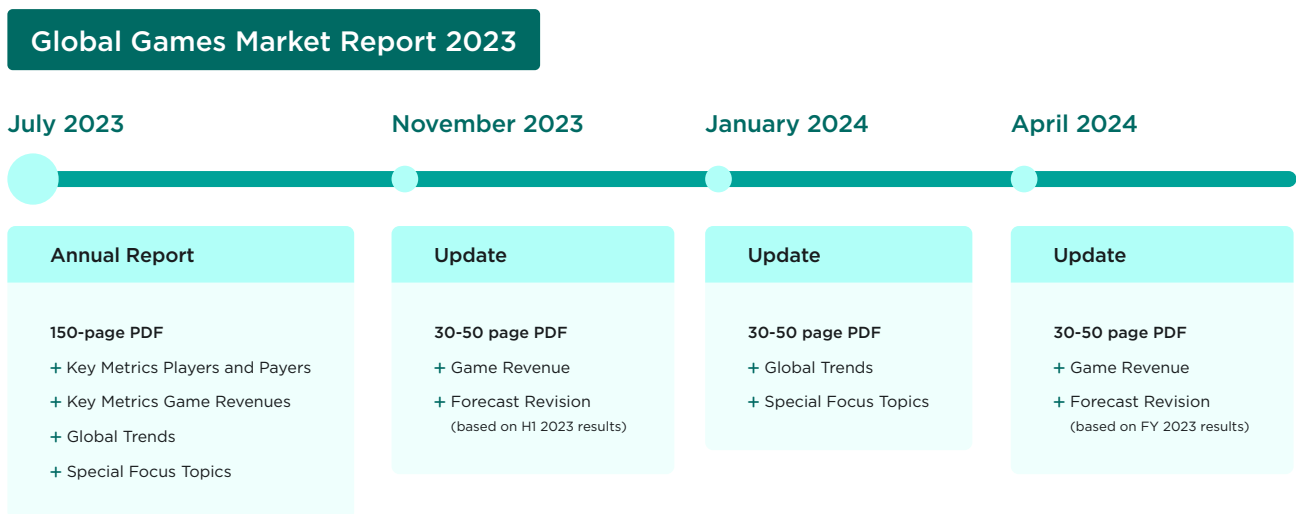
This free report offers a preview of the complete version of 2023's Global Games Market Report. The complete report offers over 150 pages of data and insights.

To get access to our full annual report, you must subscribe to our [Games Market Reports and Forecasts](#).

- ✓ Three updated PDFs launching in October 2023, January 2024, and April 2024.
- ✓ Access to all metrics via the Newzoo Platform, a downloadable Excel data set, and our Report Data Tools.
- ✓ A weekly Analyst Feed, reporting on the latest developments in the global market with takes from our market analyst team.
- ✓ Access to many more unique insights through our platform.

The data in the premium report will be updated in October 2023.

Report release timeline



Methodology

Sizing the market with a variety of data

Newzoo aims to provide clients with the best possible assessment of the size of the overall games market, broken down into segments and regions. By developing many data points, we ensure that our numbers make sense on a segment, regional, and individual country/market level. Below, we describe our approach in more detail to help clients understand what underpins our forecasts, facilitating comparisons with other data sources.

At the highest level, Newzoo focuses on three key metrics for every market: players, payers, and revenues. We define a market as a country or geographic region in combination with one or more game segment(s).

The data on players and payers is mainly based on our primary consumer research, the Global Gamer Study, which continues to form the basis of our detailed understanding of consumers and games. More than 74,000 respondents across 36 key countries/markets* were invited to be interviewed. The age range covered is 10 to 65 for all markets except Chile, China, Colombia, Egypt, India, Indonesia, Malaysia, the Philippines, Saudi Arabia, Singapore, South Africa, Taiwan, Thailand, Turkey, the United Arab Emirates, and Vietnam, for which the focus age range is 10 to 50.

Results are nationally representative in developed markets with high internet penetration. Meanwhile, in Latin America, India, emerging Southeast Asian markets (not Singapore and Taiwan), and the Middle Eastern and African markets, the results are representative of active internet users living in residential developed areas. Furthermore, in China, the data is representative of active internet users living in developed residential areas of cities defined as Tiers 1-2.

The player and payer ratios from the Global Gamer Study are projected against the online population, using UN population and ITU internet penetration metrics. The logic behind the model is that the online population is an important driver of the number of potential gamers and an indicator of how much more structural growth a country/market can expect in its potential gamer population.

The differences between the player and payer numbers in the Global Games Market Report and the Global Gamer Study stem from the use of age boundaries and the use of the residential developed (i.e., focusing on the residential developed areas) approach for certain markets. In the Global Games Market Report, the total population is considered, while in the study, we focus on those between the ages of 10 and 50 or 65, depending on the market.

The revenue data comes from our predictive games market model, which uses a top-down approach to market sizing. We incorporate macroeconomic and census data from the IMF and UN, such as household income and GDP per capita, transactional and app store revenue data from our data partners Airnow Data and Apptopia, our primary consumer research, partner data, detailed financial information reported by more than 140 public companies, and third-party research. We also receive valuable input from clients, often leading international game companies.

Market size estimates and growth forecasts for individual segments, countries, and in aggregate for the total industry are validated against our analysis of various contextual metrics. For instance, our market model calculates the average annual spend per paying gamer, which is then compared with historic numbers, other regions, household income, and GDP per capita. In years up to 2022, our historical revenues and growth rates reflect the year-end US\$ exchange rate. From 2022 onwards, to better represent consumer spending per market, we used the US\$ exchange rate at the end of each quarter, as it was more representative of revenues (in \$ value) earned by game companies operating in the global market. Our projected growth rates assume steady exchange rates

going forward. Still, we take into consideration historical growth rates in the local currency rather than US\$, as this gives a better picture of underlying growth.

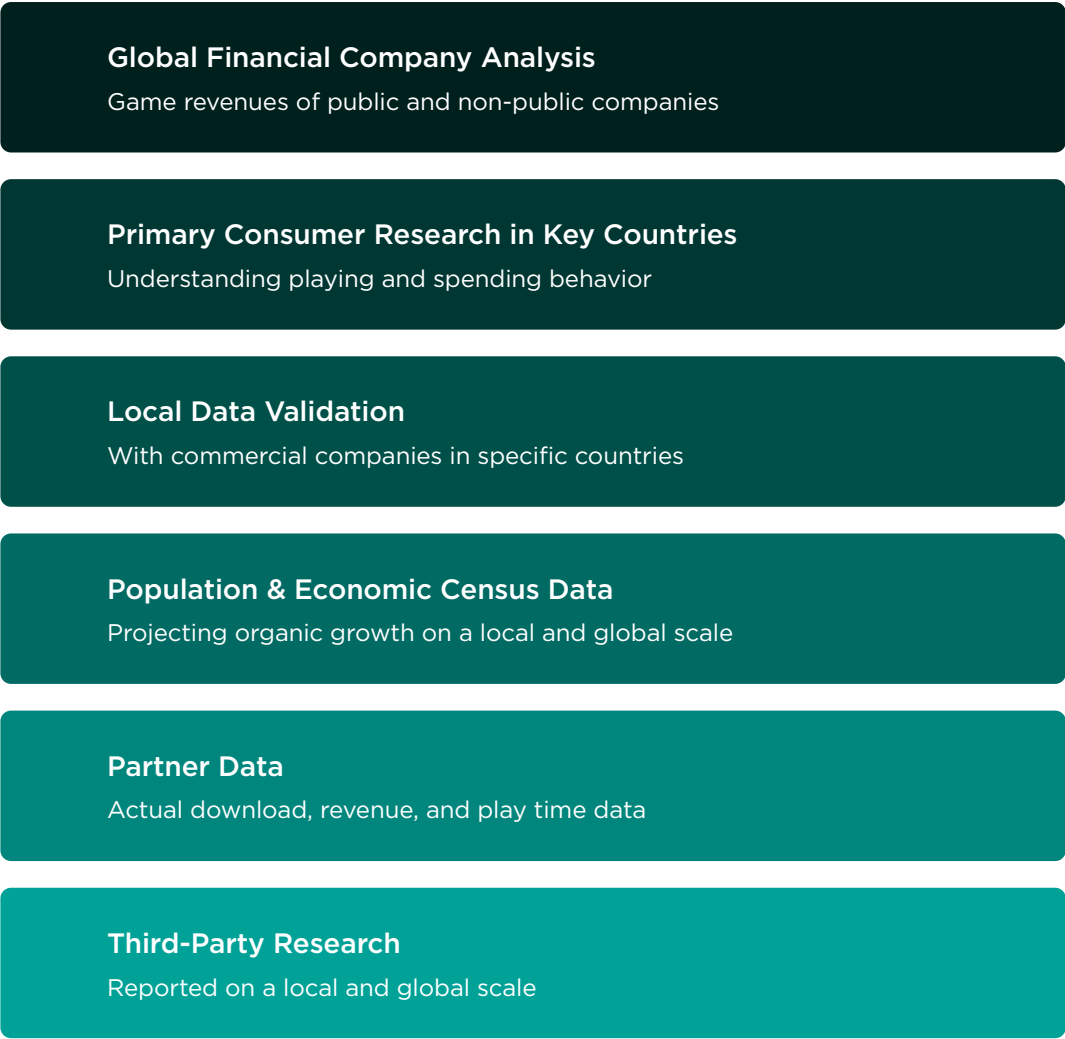
We define revenues as the amount the industry generates in consumer spending on games: physical and digital full-game copies, in-game spending, and subscription services like PlayStation Plus and Xbox Game Pass. Mobile revenues include paid downloads and in-game spending on all stores, including third-party stores, and from direct downloads. Genre definitions are aligned with the definitions used in our Newzoo Games Taxonomy, which is described in more detail [here](#).

Our revenue numbers exclude taxes, consumer-to-consumer second-hand trade, advertising revenues earned in and around games, (peripheral) hardware, business-to-business services, and the traditionally regulated online gambling and betting industry (e.g., BWIN and William Hill).

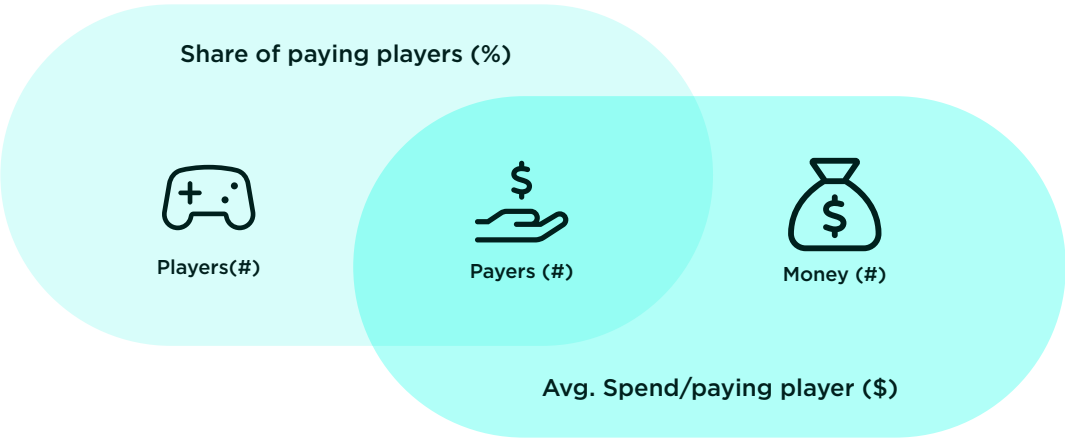
In terms of countries and regions, we define the market size as the amount companies generate from consumers in that specific territory, as opposed to the amount companies based in a particular territory generate worldwide.

The broader conceptual framework supporting our forecasts consists of the expected growth of the online population plus the expected development of the Key Market Indicators per region, as illustrated below. Overall, our forecasts are always the outcome of an iterative process, reviewing the implications of our assumptions on a very granular level. During this process, we rely on quantifiable metrics, such as historical growth rates, and include hard-to-quantify metrics, such as (gaming) culture, spending behavior, and other societal factors. At the minimum, player and payer forecasts are reviewed twice per year, the results of which are shared in our Q1 Quarterly Update and the Annual Report. Revenue forecasts are reviewed after each quarter, the results of which are shared in our periodic updates.

Global games market report methodology



Global games market model



Terminology

Key metrics

Players All people who play (digital) games on a PC, console, mobile device, or cloud gaming service in the past six months.

Payers All people who have spent money to play games on a PC, console, mobile device, or cloud gaming service in the past six months.

Game revenues Consumer revenues generated by companies in the global games market, excluding hardware sales, tax, business-to-business services, and online gambling and betting revenues.

Active VR hardware install base Consumer VR headsets capable of 6DoF positional tracking and being used at least once in the past 12 months. We exclude enterprise headsets that can also be used to play VR games and headsets that use only 3DoF tracking; for example, all smartphone-based VR headsets such as Samsung Gear VR and entry-level standalone headsets such as Oculus Go.

Android App Stores Players Those who played mobile games at least once in the past six months on an Android device.

Apple App Store Players Those who played mobile games at least once in the past six months on an iOS device.

Augmented reality (AR) A technology that supplements real-life views of users with computer-generated sensory input as images or sounds.

Big spenders Payers that spend an average of \$25 per month or more on gaming content per platform on PC, mobile, or console.

Browser PC games Games played on casual game websites or social networks.

Cloud gaming or game streaming The ability to play a game on any device without owning the physical hardware required to process it or needing a local copy of the game itself. Also called game streaming, the games are processed remotely on cloud or edge servers and streamed directly to a user's device.

Compound annual growth rate (CAGR) The constant growth rate over a period of years. In this report, all CAGRs are based on the years 2021-2026.

Console games Games played on a TV screen directly or through a console, such as Xbox, PlayStation, and Nintendo, or on handheld devices, such as a Nintendo DS or PS Vita. Does not include handheld PC devices.

Degrees of freedom (DoF) The number of directions of users' positional tracking in VR, which relies on built-in or external sensors to capture movement. While 3DoF tracking only measures three types of directional rotation (rolling, pitching, and yawing), 6DoF adds three further directional movements (elevating, strafing, and surging).

DLC revenues Revenue generated from downloadable content (DLC) consumer spend. Downloadable content is purchased from a digital store directly, not via in-game currency.

Downloaded/Boxed PC games PC games downloaded from websites or services (i.e., Steam or Epic Games Store) or purchased as a boxed product (CD/DVD), including client MMO and MOBA games.

Epic Games Store players We define Epic Games Store players as those PC players who have played or downloaded games using the Epic Games launcher at least once during a given year.

Esports enthusiasts People who watch professional esports content more than once a month.

Esports Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams that are competing against each other.

Free-to-play (F2P) games Games that are (legally) free to download and play, very often offering in-game spending opportunities.

Full Game Boxed revenues Revenues generated by the sales of games or game-related content delivered on physical storage media (i.e., discs or cartridges). Also includes physical copies ordered in online stores. Does not include boxed games that only include download codes. Also referred to as premium boxed revenues.

Full Game Digital revenues Revenues generated by the sales of games or game-related content purchased directly from an online store and delivered through a digital download, e.g., the PlayStation Store, Microsoft Store, Nintendo eShop, Steam, and Tencent WeGame. Also referred to as premium digital revenues.

Game genres A genre is a classification assigned to a game, based on its gameplay interaction rather than visual or narrative differences. A genre is a group of games with highly similar gameplay and interaction patterns for the player. For an overview of categories and descriptions of all genres in the Newzoo Games Taxonomy [visit our help center](#).

Game revenues Consumer revenues generated by companies in the global games market, excluding hardware sales, tax, business-to-business services, and online gambling and betting revenues.

Game video content Refers to all video content based on game content, including live-streamed esports and non-esports content, video-on-demand, and short-form video.

Games as a service (GaaS) Games as a service provides game content or access to games on a continuous revenue model, e.g., via a game subscription service or a season/battle pass. Also referred to as live service games.

Games live streaming audience People who have watched live-streamed gaming content at least once in the last six months.

Highly engaged players Players that indicate they spent a minimum of 10 hours per week playing on a PC, mobile, or console.

Hours watched Total amount of hours a game or channel has been watched by consumers.

In-game revenues Revenues generated through the sales of in-game items, including expansion or content packs, cosmetics/skins, power-ups, time savers, loot boxes, playable characters, content passes for a one-off fee (battle/season pass), in-game currencies, content passes for a recurring fee, and reward passes. In-game revenues are the sum of DLC, microtransaction, and in-game subscription revenues.

In-game subscription revenues Revenue generated from periodic subscription-based consumer spending for a single game, such as a subscription to an MMO or a membership that provides in-game perks. Does not include battle or season passes.

Live service games Games that provide game content or access to games on a continuous revenue model, e.g., via a game subscription service or a season/battle pass. Also referred to as Games as a Service (GaaS).

Metaverse A virtual social environment where people can create and engage in shared experiences.

Microtransaction revenue Revenue generated from microtransaction consumer spend including but not limited to virtual currency, cosmetics, battle passes.

Mobile phone games Games played on tablets or smartphones.

Monthly active users (MAU) Represents the number of users who launched a title at least once in a given month.

Multi-game subscriptions or multi-game subscription revenues Revenues generated by periodical fees paid for subscriptions to libraries offering multiple games. A service a user can access by paying for a pre-determined time period. In this report, the term multi-game subscription is used in the context of a game subscription service, which is a service that offers access to software content without providing the platform/hardware access that a cloud gaming service provides.

Nintendo Players Those who played games, at least once in the past six months, on a Nintendo Switch, 3DS, or Nintendo's old-gen (handheld) console such as Wii U, Wii, and DS.

Non-fungible token (NFT) A unit of data stored on a blockchain that certifies the uniqueness of digital assets.

Online population All people within a country/market or region who have access to the Internet, via a computer or mobile device.

Pay-to-play (P2P) games Games that must be paid for upfront or are paid subscription-based games. Also referred to as premium games.

Peripherals Gaming-related hardware products that are used for gaming, such as gaming mice, keyboards, headsets, controllers, or monitors.

PlayStation Players Those who played games, at least once in the past six months, on a PlayStation (PS) 5, PS4, PC via PS Plus cloud streaming (formerly PSNow), or PS' old-gen (handheld) console such as PS3, PS Vita, and PSPortable.

Premium games Games that must be paid for upfront or are paid subscription-based games. Also referred to as pay-to-play games.

Spend/payer Annual average revenue generated per payer (Game revenues/Payers).

Subscription revenues Revenues generated by periodical fees paid for subscriptions to gaming content. A service a user can access by paying for a pre-determined time period. In this report, the term is used in the context of a game subscription service, which is a service that offers access to software content without providing the platform/hardware access that a cloud gaming service provides.

Virtual reality (VR) The computer-generated simulation of a three-dimensional image or environment that can be interacted with in a seemingly real or physical way by a person using special electronic equipment, such as a headset with a screen inside or gloves fitted with sensors.

VR games revenues VR games revenues generated through the consumer VR headsets capable of 6DoF positional tracking.

Xbox players Those who played games on an Xbox 360, XB One, XB Series S|X, PC via Game Pass, or Mobile via Game Pass in the past six months.



03

**The Global
Games Market**

The global games market

An overview per region and segment

Key takeaways

The global games market will generate \$187.7 billion in 2023, representing +2.6% year-on-year growth. The following section dives deep into our player and payer numbers while highlighting how we split revenues per segment and region. We also look at the market's growth toward 2026, analyze our latest numbers for the cloud and VR markets, provide a breakdown of global game revenues per monetization method, and touch on an array of impactful games industry topics and trends.

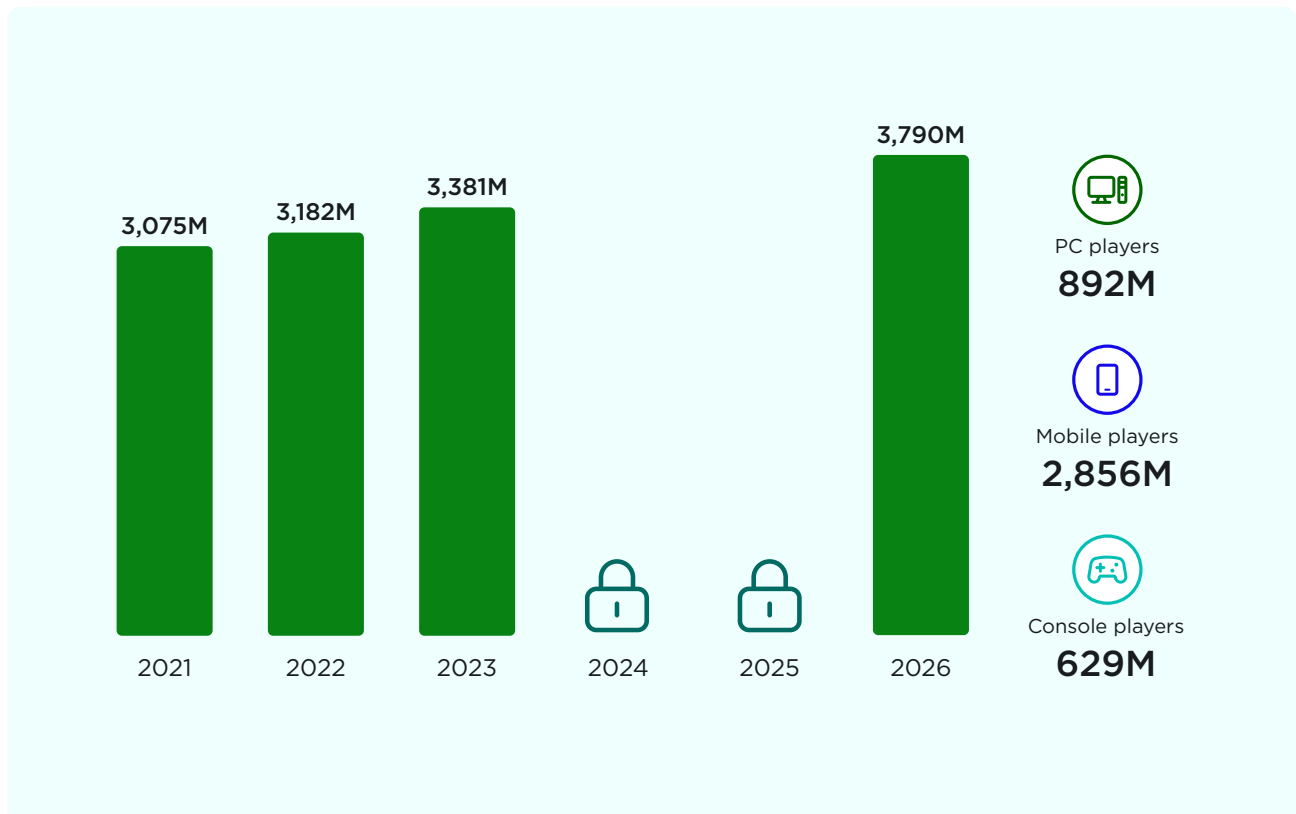
- ✓ The number of players worldwide will reach 3.38 billion in 2023, growing +6.3% year-on-year. Mobile will contribute to most of this growth. As gaming continues to permeate the mainstream and young people age up, player numbers will rise across the board.
- ✓ Payer numbers will grow by +7.3% globally to 1.47 billion in 2023. Looking further ahead, we see that worldwide payer numbers will continue to grow with a CAGR (2021-2026) of +4.7% to reach 1.66 billion players by the end of 2026.
- ✓ In 2023, the global games market will generate revenues of \$187.7 billion—a +2.6% year-on-year growth, despite challenging macroeconomic factors.
- ✓ Mobile accounts for the highest share of revenues, but a challenging privacy landscape will somewhat limit growth until 2026.
- ✓ Console will be 2023's biggest revenue growth vehicle, thanks to its +7.4% year-on-year growth. To put this in context, the console segment underperformed in 2022 due to several development and release delays.
- ✓ The industry is continuing to stabilize after some pandemic-induced turbulence. The global games market will generate yearly revenues of \$212.4 billion in 2026. The current console generation—bolstered by a successor to the Nintendo Switch—will be in full swing by then. Mobile developers should have also adapted to mobile's new privacy landscape.

Players and payers

The number of players worldwide will reach 3.38 billion in 2023, a +6.3% year-on-year increase. Mobile will account for the bulk of these new players, but every segment will add new players to the global games market. Game-related engagement is sticky, and many players who entered the market during the early lockdown years of the pandemic will keep engaging with games in some form.

Global player forecast

2021-2026

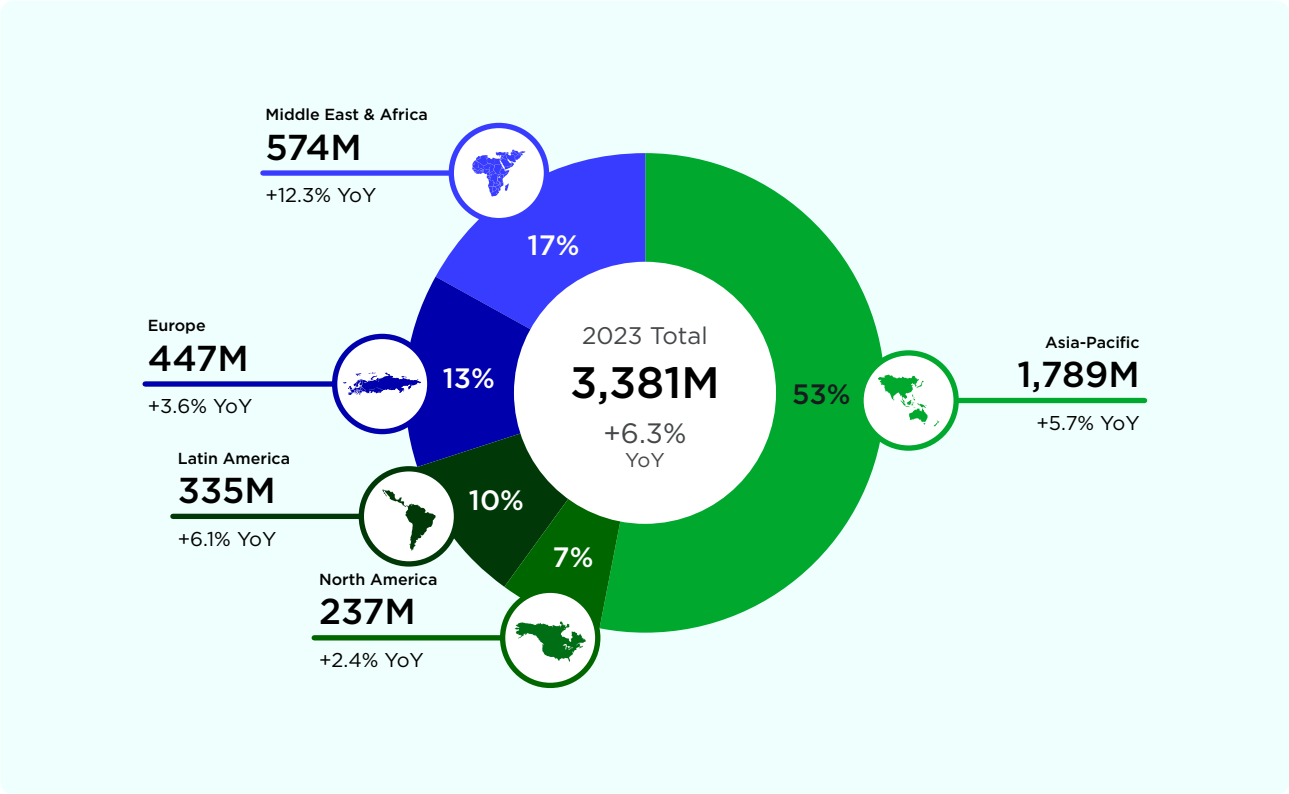


The full six-year forecast is included in the complete version of this report. [Learn more.](#)

Gaming is now fully embedded in the mainstream. With each younger generation, gaming engagement increases. As current players age and new players enter the fold, player numbers will continue to rise. What's more, 2023's biggest game-based transmedia releases—including the Super Mario Bros. Movie and HBO's The Last of Us—and the countless other game-related movies and TV shows in production will continue to legitimize the industry among non- and lapsed players. To that end, global player numbers will continue to grow with a 2021-2026 CAGR of +4.3% to reach 3.79 billion players by the end of 2026.

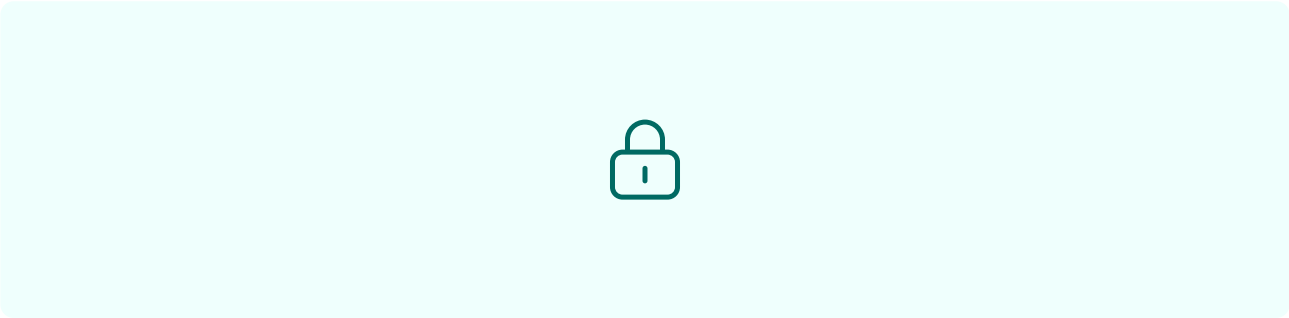
2023 Global players

Per region



Asia-Pacific accounts for more than half of players worldwide, thanks to huge markets like India and China and highly gaming-engaged countries like Japan and South Korea. Meanwhile, North America and Europe account for 20% of players. Relatively speaking, the less mature markets of the Middle East & Africa (+12.3% year-on-year player growth) and Latin America (+6.1%) will enjoy the most player growth in 2023. Factors driving this growth include better (mobile) internet infrastructure, accessible and affordable (mobile) internet, and the rise of the middle class. The availability of gaming as an affordable recreational activity, thanks to the free-to-play model and the increasing population of smartphone users, is also contributing.

Payers



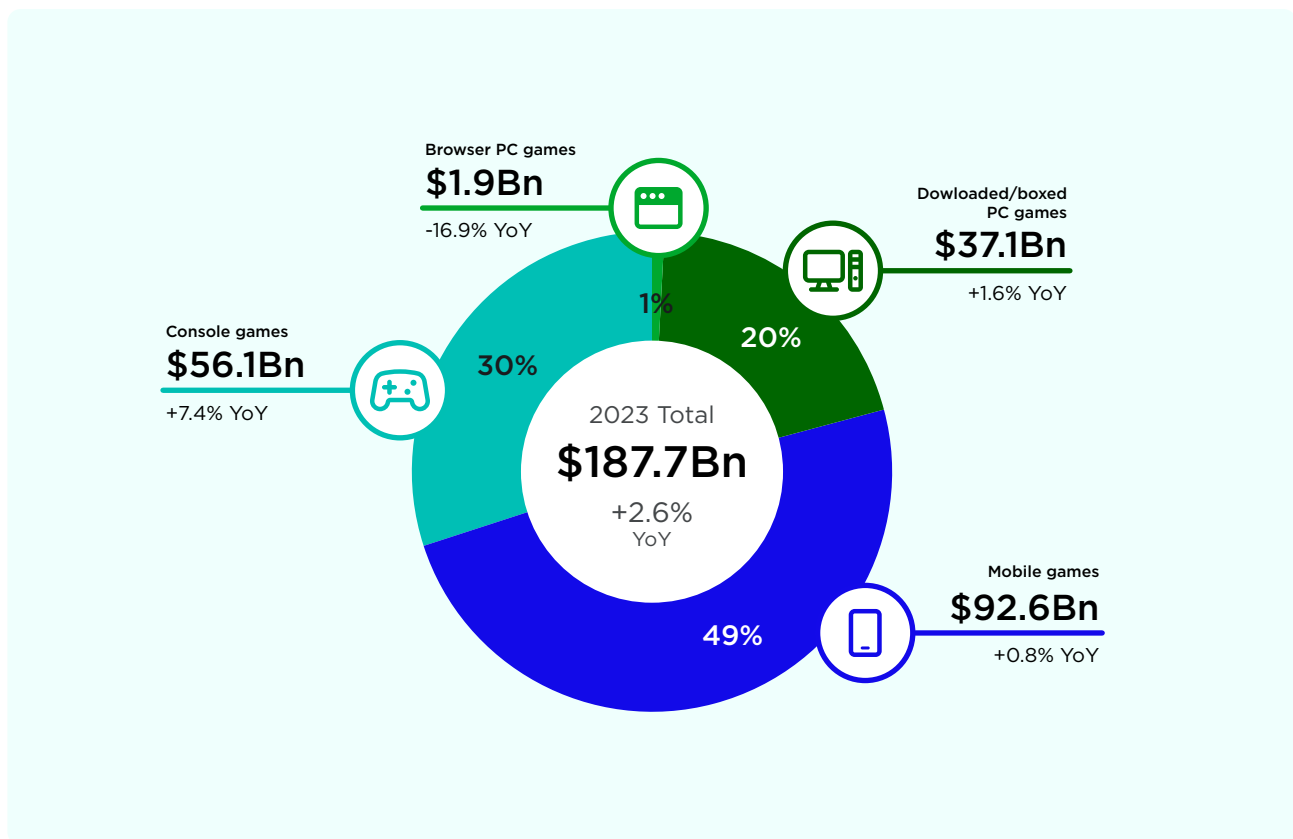
The complete report includes the latest payer statistics. [Learn more.](#)

2023 Game revenues

In 2023, the global games market will generate revenues of \$187.7 billion, representing a +2.6% year-on-year growth despite challenging macroeconomic factors. You can see in the following chart that the mobile segment will see year-on-year revenue growth of +0.8% in 2023, which is far lower than growth rates in prior years. Mobile publishers are currently facing privacy-related monetization and user-acquisition challenges due to policies from Apple and Google. Mobile developers and marketers have been forced to course-correct their strategies and experiment with new ones, stopping the segment's trend of immense growth in its tracks. That said, revenue growth in emerging markets—and the continued strong performance of mobile's biggest legacy hits—will ensure some growth in 2023. Mobile will remain gaming's most significant segment by consumer spending by far, accounting for just under half of the entire global market.

2023 Global games market

Per segment



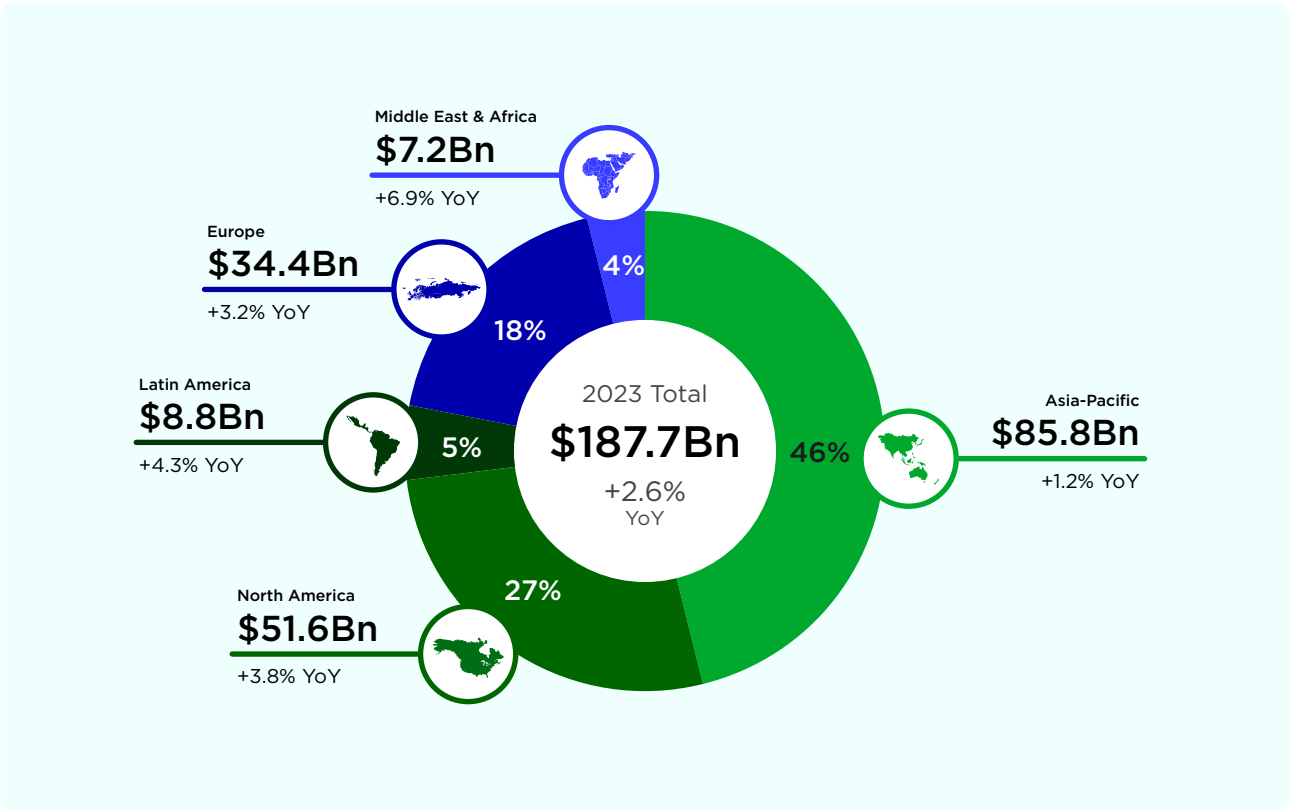
The console segment, meanwhile, will be the market's second-biggest segment, generating \$56.1 billion in 2023 to make up 30% of the entire market. Console will also be 2023's biggest revenue growth vehicle, thanks to its +7.4% year-on-year growth. However, it is important to note that several delays led to underperformance in 2022, with many of these titles accounting for 2023's projected performance. Many of these delays were due to disrupted development schedules during COVID, but game development's growing scopes and complexity mean delays are inevitable, especially when it comes to the larger-scale revenue-generating AAA games. Therefore, many of the biggest titles initially slated for 2022, 2021, and even 2020 all launched this year. This includes H1's multi-million-selling blockbusters like Hogwarts Legacy, The Legend of Zelda: Tears of the Kingdom, and Final Fantasy XVI. H2 also has some huge heavy hitters in store for consumers, including Marvel's

Spider-Man 2 for PlayStation 5, Forza Motorsport and Starfield for Xbox, and the first original 2D Mario title in years from Nintendo (Super Mario Bros. Wonder).

Meanwhile, the (yearly) third-party heavy hitters such as Call of Duty, EA Sports FC (formerly known as FIFA), and a new Assassin’s Creed title will only accelerate 2023 revenues further. Of course, live-service hits like Fortnite, Rocket League, and others will continue to engage and monetize gamers via their seasonal content. Many third-party titles will also contribute to PC’s revenues. That segment will grow only marginally: +0.5% to hit \$39.1 billion this year. While the PC has enjoyed hits like Hogwarts Legacy and other third-party releases, it lacks many of the first-party hits seen on console (that were delayed to this year). At the same time, PC ports have seen less-than-stellar optimization this year, likely leading some platform-agnostic players to opt for the console versions of third-party games. What’s more, PlayStation’s timed exclusivity (Final Fantasy XVI) and co-marketing deals (Hogwarts Legacy) are likely pushing revenues from this content away from PC and towards the console segment.

2023 Global games market

Per region



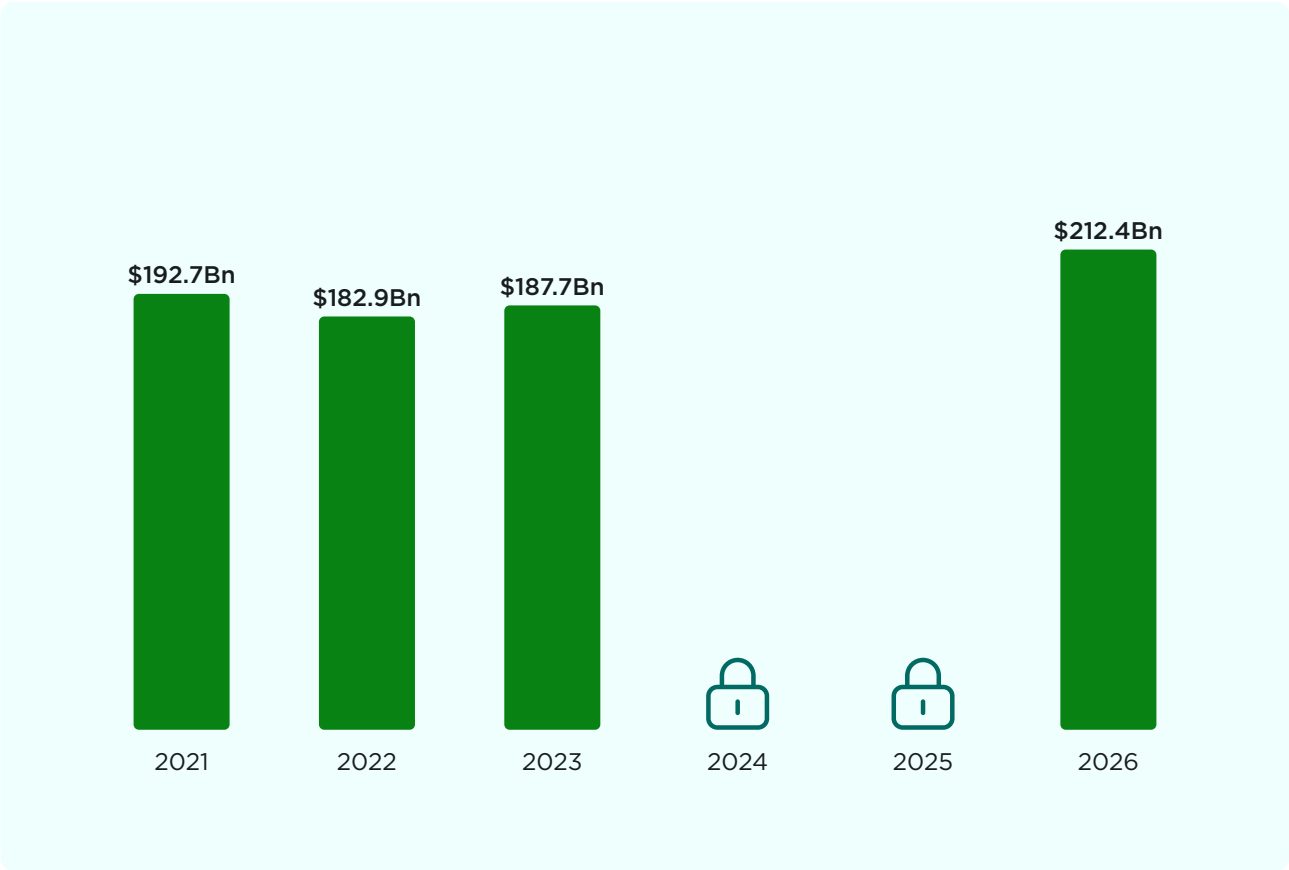
We can see that most regions will enjoy healthy game revenue growth in 2023. The West’s appetite for console gaming, which is seeing strong growth across the board, is driving growth in Western markets. To that end, North America’s games revenues will grow +3.8% to hit \$51.6 billion, while Europe’s will grow +3.2% to reach \$34.4 billion. Together, these two regions will account for 46% of 2023’s global games market revenues. Meanwhile, growth markets will live up to their “growth” labels. The Middle East & Africa and Latin American regions will grow by +6.9% and +4.3%, respectively. While each of these markets will account for less than 5% of global games revenues, they will continue to see growth—despite mobile’s privacy challenges—thanks to improved mobile internet infrastructure, affordable access to the internet, the availability of affordable gaming, and the growing number of smartphone users.

Asia-Pacific is the biggest games region in 2023, accounting for 46% of global revenues. However, with just +1.2% year-on-year revenue growth in 2023, Asia-Pacific's growth lags behind the rest of the world. This may come as a surprise due to the region's many growth markets. The slower-than-usual growth rate results from the Chinese market bringing down the region's average with its +0.7% year-on-year revenue growth. We remain fairly cautious about the future of gaming in China—mostly due to the transformative impact of lockdowns and restrictions on minors' gaming time. While more games are receiving licenses in the market, the ripple effect of the previous freezes and slow license issuing are echoing throughout China's games market. At the same time, the termination of NetEase's collaboration with Activision-Blizzard for publishing Blizzard's PC games locally will adversely impact PC game revenues in China.

2021-2026 Game Revenues












Global game revenues per segment

2021-2026



The top public companies by game revenues

Every year, Newzoo ranks the top public companies by game revenues. We base our list on an analysis of annual and quarterly financial reports published by relevant publicly listed game companies. Check it out below.

| | Company | Revenues |
|---|----------------------------|----------|
| 1.  | Tencent | \$7,556M |
| 2.  | Sony | \$4,380M |
| 3.  | Apple | \$3,683M |
| 4.  | Microsoft | \$3,152M |
| 5.  | NetEase | \$2,717M |
| 6.  | Google | \$2,432M |
| 7.  | Activision Blizzard | \$2,261M |
| 8.  | Electronic Arts | \$1,874M |
| 9.  | Nintendo | \$1,295M |
| 10.  | Take-Two Interactive | \$1,266M |
| 11.  | Warner Bros. Entertainment | \$1,007M |



Learn more about which companies are topping the revenue charts in the complete report.

Monetization and delivery method breakdown

In terms of monetization and delivery, full game (or boxed) will see the slowest growth of all the segments we track. While boxed revenues are on track to rise slightly from 2022 to 2026, the segment's share of the entire market's revenues will drop. On the console front, public company financial reports show that digital sales are on the rise, while physical sales drop. Part of this can be attributed to the availability of digital-only consoles, while another factor could be the early-access benefits of digital copies.



Cloud gaming

Cloud gaming is a growing market dominated by a few services that account for most paying users. This market has the potential to rack up 43.1 million paying users by the end of 2023, with this number growing to 80.4 million by 2025.



Learn more about the essential monetization, delivery, and cloud gaming trends with the complete report.



04

Key Trends

The console and PC live-services boom is unmistakable, but is it sustainable?

The PC and console games markets are strong and growing. Yet, many companies face a challenging macro environment (resulting in headwinds for revenue growth), and the console and PC player base is growing slower than many companies' growth aspirations. To that end, game makers across console (first- and third-party) and PC are experimenting with several new strategies to monetize current players further, diversify their revenue streams, and increase their total addressable market. These include entering mobile, experimenting with content subscription services, and—most notably for the next five years of the console and PC game development—live services (games that developers support over a long period with new content that players can engage with and spend on over time).

This trend piece will explore the increasing pace at which console and PC developers are shifting from full-priced premium games to live services and how PlayStation and—to a lesser extent, Xbox—are embracing the trend in earnest. We also cover how mobile developers and Chinese tech giants are entering the console and PC live-service space. With such an influx of time-consuming live-service content among a finite number of players and playtime, we also explore how sustainable the market for live-service games is now and in the future.

Explore the entire trend in the complete, paid version of this report, covering:



Third-party live-service games dominate MAU and revenue charts on PC, Xbox, and PlayStation; other companies see these successes and follow suit



PlayStation and Xbox are also continuing to experiment with live services



Mobile game developers and Chinese tech giants will bring even more live-service content to consoles



The console and PC live-services rush is underway

The pros and cons of generative artificial intelligence (AI) in the future of game development

On November 20, 2022, OpenAI released ChatGPT to the public, and the seismic impact on society was almost immediate. Today, you can't read a business or tech news site without encountering articles on generative AI and its effects on nearly every sector (gaming very much included). Generative AI, which uses neural networks to spot patterns and structures in data to generate original content, has already become a sought-after tool to speed up content creation. Swift advances in large language models (LLMs) only make AI-generated content more believable, useable, and—in many cases—indistinguishable from human assets. One day, creating entire games from the ground up may be possible using generative AI.

The game development community's current response to generative AI ranges from optimism (how generative AI will speed up the development process and allow for more creativity) to pessimism (concerns around mass layoffs—something already common in the industry). Given how fast AI tools are hitting the market and the swift impact they are already having on gaming, it's easy to get caught up in the current AI-driven anxiety, especially with developers fearing the loss of their careers.

In this trend piece, we will discuss these scenarios—and how AI might impact our industry—in more detail.

Gaming CEOs are torn on the impact of generative AI, with some core players disgruntled at these early stages

Many prominent voices in the games market have come forward to address how AI may affect the industry. Activision Blizzard's CEO, Bobby Kotick, shared his belief that AI will have a "profound positive impact" on gaming, while Andrew Wilson, EA's CEO, warned that AI may lead to "displacement of the workforce." At the same time, we have already seen the first evidence of pushback from gamers.

In early June, fans reacted negatively to Cyan Worlds (the studio behind Myst) use of "AI-assisted content." The company had used AI to support the creation of journals, logs, stories, songs, poems, and in-game wallpaper. Some players felt the game's world-building was bland and blamed it on the AI, while others felt betrayed that people weren't doing 100% of the development. As added context, the puzzle title has received mixed critical reception, but this does not take away from the strong response from fans regarding AI being used to complement game development efforts. In response to the criticism from players, Cyan Worlds took to Twitter to downplay how much the game leveraged AI. It remains unclear whether players would have noticed anything if the banner had not directly underlined the use of AI.

Generative AI is being used to streamline game development and decrease budgets

AAA game development is a demanding endeavor, with soaring budgets and extensive scopes that have expanded significantly in the last decade. Although revenues generated from the games market have generally surpassed these escalating costs, primarily due to inventive monetization approaches, the development timeline for AAA games can now extend beyond five years (seven years for some games, such as Xbox's Perfect Dark game). Costs related to the talent and technologies required in the game creation process are a major

part of these rising development costs. When factoring in marketing expenses, development budgets are now in the hundreds-of-millions-of-dollars range (perhaps even a billion for the biggest games). Expensive LiveOps costs related to the growing trend of live-service games are also contributing. Naturally, publishers are actively seeking ways to mitigate these escalating costs, and one compelling solution that has emerged is generative AI.

As A16Z revealed in a thread on Twitter, 87% of the 243 studios they surveyed are using AI, with 99% planning to do so in the future. Additionally, 64% of studios are planning on creating in-house models similar to Blizzard's patented Diffusion tool, which leverages generative AI to produce art assets faster—a way for companies to use machine learning to transform low-fidelity texture inputs into high-fidelity assets fit for a AAA game. Such technology will streamline tasks for artists working in the games industry. For instance, artists will be able to create an asset like a tree or flower, then leverage AI to generate hundreds or even thousands of variations, reducing the manual labor required to create richly populated organic environments.

Generative AI may also help with prototyping and concept art, changing the artist's scope to more of a curation role. In this case, the generative AI tool would produce many designs based on the artist's input (for example, "generate a goblin character with a Viking-inspired style"). The artist would then curate the best outputs that match the game's theme and use the AI's output as inspiration. There may be a concern around file sizes potentially associated with hundreds of assets, especially in 4K, but procedural generation and other game development techniques may be used to lessen that burden. In the immediate to short-term, however, we expect to see an outsized majority of developers using generative AI in image prototyping and creation.

While generative AI tools have the potential to reduce the number of artists needed on projects, studios may retain the same number of artists with the knowledge that they now have more time to create better assets. Using generative AI may also streamline hiring processes, especially for specialist roles. Newly hired artists may be able to leverage generative AI to create assets in a game's house style, meaning that companies won't have to comb the job market for people with years of experience in niche genres. This development may give less-experienced artists a leg up in the job market, providing more pathways into the industry.

We will also start to see more AI-generated voices in games—something we already saw with voice acting in 2022's *High on Life* from Squanch Games. While voice-cloning scams are on the rise, game developers are leveraging the power of AI to produce unique voices, bypassing the need to source voice actors for NPC and main character roles. Unfortunately, voice actors may see fewer opportunities in the future, especially as game developers use AI to cut development costs and time. However, it is worth noting that big AAA prestige games like *The Last of Us* and *God of War* use motion capture and voice acting similarly to Hollywood. Other games, such as *Cyberpunk 2077*, cast celebrities like Idris Elba and Keanu Reeves. In such games, we do not expect AI to replace real-world actors. The situation differs for smaller games (*High on Life*), indie titles, and mods with smaller budgets (or nonexistent in many modders' cases). We are already seeing modders integrating ChatGPT and other tools into *Skyrim* to provide NPCs with an organic and infinite list of new comments. This will make the world feel more alive and allow NPCs to react to how events play out in the game.

In the next two or three years, generative AI tools may replace a significant share of CGI and video production in games (and game marketing, where video-, image-, and audio-based campaigns are ubiquitous). Small groups of artists using AI will be able to generate these videos more efficiently than larger CGI-specialized teams. This has the potential to not only improve and enhance videos and gameplay elements, but it could also help developers to modernize older titles that may have been too expensive to remaster previously. However, larger developers may opt for a more "authentic" remastering.

The long-term effects of AI technology are less certain. Still, it's safe to assume that in the not-too-distant future, developers and even laypeople will be able to generate entire games using generative AI. As tools become cheaper and easier to use, the barriers between developers and gamers will continue to break down, and the global industry may become more community generated. In fact, user-generated content is already becoming

a major part of companies' strategies, with Epic, Roblox, and even companies like PlayStation working on their own UGC-driven games. Roblox is even working on an initiative that allows every user to start building content within the game's environment.

While still in its early days, generative AI could turn RPGs, especially MMORPGs, into infinite living worlds that can grow organically with the player—a LiveOps dream for many developers. Generative AI could also be a boon for IP-based games and transmedia. For example, an algorithm could take an IP (Star Wars, for instance) and authentically extrapolate new content for players to engage with. Each time a player enters the world, there could be an entirely different story with distinct outcomes. Of course, some consumers will not go for this and may prefer a much tighter, curated experience they can finish and walk away from. There is no shortage of developers who will still want to tell a story like *Spiritfarer* or *Journey*. However, questions of profitability and saturation will soon arise as AI makes game development more accessible and cost-efficient.

Of course, new technologies for streamlining game development have been a part of the industry for over 40 years. Significantly, many developers (especially AAA) have shied away from using these advances to build games faster. Primarily they've leveraged new technologies to create bigger games packed with more content that are more expensive and time-consuming to develop. Some AAA development cycles have even surpassed five or even seven years. Generative AI could change this for many studios, alleviating time and budget stressors. It could even usher in a more diverse, sustainable, and genuinely amazing games industry.

The pitfalls of generative AI

The legal case for using AI-generated content in games (and other media) is murky at best. Generative AI pulls from massive data sets to produce seemingly original content, and it's incredibly challenging to track whether any of these data points are texts or images under copyright. Any developer using generative AI without deep due diligence opens themselves to copyright infringement lawsuits. Already, Getty Images has filed a suit against Stable Diffusion for using images owned by the former without prior consent. While this issue is still being litigated, it foreshadows the potential legal problems for developers keen on using AI.

Pushback from developers and gamers alike will likely accompany these impending legal challenges. Studios may want to reframe this as an opportunity to educate players on the benefits of generative AI in creating games, with increased transparency on its use. As generative AI tools become more sophisticated, players may make their own games, with the industry turning to AI as a way to counter IP infringement and approve games to platforms in similar ways to how sites like YouTube function. GameDiscoverCo's Simon Carless reported that Valve has already started banning games on Steam that incorporate AI-generated art assets without compelling legal claims to those assets. However, it's still entirely possible for people or groups to host servers in unregulated geographies, acting as a hub for millions of unregulated AI-facilitated UGC titles—regardless of IP, likenesses, and licenses. Situations like these make it especially tricky to enforce generative AI. Appropriate regulation will be required for the use of generative AI in the creation of video games. This regulation should clearly define what role fair use has in the use of artificial intelligence.

Generative AI will usher in a new era of game development

While generative AI will inevitably change how games are conceptualized, created, and distributed, it will not be the end but the beginning of a new era in our favorite entertainment medium. While there will be growing pains, generative AI will likely help democratize game development, accelerate trends like UGC and live services (thanks to streamlined content creation), and lead to game experiences that were unimaginable even a few years ago. Back in 1993, players could never have conceived the games consumers are playing today. In 2053, who knows what will be possible thanks to the advent of generative AI and the trends, content, and cultures it fosters? We see incredible potential for generative AI in gaming but underpin this outlook with the need for regulation and vigilance.

Nintendo Switch to Steam Deck and beyond: Complementary gaming devices are becoming more prominent

In 2017, Nintendo released the Switch, bringing an innovative hybrid approach to the console market. This new console allowed players to game at home on a television, like with a typical console (docked) but also natively in a handheld mode (undocked). The feature was a hit among consumers and changed how many people thought about and engaged with games.

Today, several manufacturers and platform holders are working on ways to allow players to take their console and PC games on the go. Strategies include dedicated cloud gaming devices (such as the Logitech G Cloud), local Wi-Fi remote play (Sony's Project Q), and native handheld portable gaming PCs (Steam Deck and Asus ROG Ally). These products are intended to be secondary to consumers' primary gaming devices. For example, Project Q complements Sony's PlayStation 5, while the Steam Deck complements a gaming PC. We will refer to these handhelds as "complementary devices."

Explore the entire trend in the complete, paid version of this report, covering:



Why are complementary devices gaining traction?



Hype around the Steam Deck led to an influx of portable PC developments



The markets for complementary devices and handheld PCs are exciting but unproven

Mobile gaming: Platform policies and regulations define the way forward for mobile gaming studios

Apple brought chaos and uncertainty to the mobile app market (including games) when it rolled out its App Tracking Transparency (ATT) and SKAdNetwork 2.0 in April 2021. While it subsequently introduced some developer-friendly features in SKAdNetwork 4.0, none of those changes gave developers the precise targeting methods they relied on in the past. During WWDC2023, Apple announced the “Privacy Manifest” feature, further limiting ad networks’ ability to use user tracking to optimize campaigns.

Explore the entire trend in the complete, paid version of this report, covering:



Background on Apple’s SKAdNetwork, fingerprinting, and the Privacy Manifest



New games, existing games that rely on ads, and third-party ad networks will face the most challenges



The mobile games market is adapting to a new policy and regulation landscape



Viable marketing and user acquisition (UA) strategies



Bringing mobile games to PC and console



Strong content and innovative marketing will trump user tracking

Gaming, UGC, and the creator economy collide with influencer-led game studios

Influencers are a fundamental part of the games market.

Creators making content on video platforms like Twitch have been integral to marketing games for years, with titles like Apex Legends, Valorant, and others successfully leveraging influencers to help their games quickly amass substantial player numbers. For many consumers, the viewpoints and recommendations of these creators have replaced traditional journalism and games criticism.

At the same time, creators are diversifying their revenue sources to avoid relying so heavily on the video and social media platforms on which they built their audiences. A slew of controversial policies from Twitch, like reducing creators' revenue share and stopping creators from casting on Twitch and other non-mobile streaming services simultaneously, is only accelerating this streamer shift towards revenue diversification.

Explore the entire trend in the complete, paid version of this report, covering:



Notable influencer-led studios and why marketing is the backbone of the strategy



Influencer-led games focusing on user-generated content (UGC) seem best poised for success, but staying on brand matters most

The state of VR: Apple enters the ecosystem, and Meta doubles down on affordability and gaming

Over the past years, the popularity of virtual reality (VR) gaming has mirrored the general games market. VR experienced a boost in popularity during the lockdown periods, as it offered consumers a way to escape the confines of the home and explore immersive, vibrant virtual worlds. Also, like with the general games market, VR faced challenges when people left lockdown and took up pre-pandemic activities in the physical world. Players started spending less time and money on playing VR games and purchasing new content.

Overall, we expect a lot from the future of VR, including a clearer path toward more widespread adoption of augmented reality (AR) devices.

Explore the entire trend in the complete, paid version of this report, covering:



VR is on track for steady hardware and software growth



Standalone headsets are on track for healthy growth, thanks to movements from Apple and Meta



Apple's strategy focuses on computing over games and on AR over VR



Meta is continuing to underline games as a unique value proposition



Virtual and extended reality look more promising than ever

Notable games market developments in Saudi Arabia, Japan, and China

Savvy Games Group is leading massive investments in Saudi Arabia's gaming future

To diversify its economy and avoid relying so heavily on its oil revenues, Saudi Arabia is in the middle of a hugely ambitious gaming investment campaign, dedicating nearly \$8 billion to acquire and establish ownership in global games brands. This strategic move aims to establish Saudi Arabia as a prominent player in the entertainment industry, and gaming is at the heart of it. Saudi Arabia's main gaming-related investment entity, Savvy Games Group, boasts a substantial \$38 billion fund to facilitate these ventures. Savvy's investment activities encompass several notable deals, including securing a significant stake in China's VSPO, Sweden's Embracer Group, and acquiring the US-based Scopely. Savvy Games Group also owns ESL Facelt, a prominent organizer in the esports sector.

Explore the entire trend in the complete, paid version of this report, covering:



Players in Japan's traditionally mobile- and console-first market are embracing PC games



Local regulations in China are driving Chinese publishers to new markets and platforms



Read all of our key games market trends in the full report. [Learn more.](#)



05

Special
Focus Topics

Transmedia: How game-based film and TV impact game engagement

We have long covered gaming's growing transmedia trend, in which game companies bring their IP to film, TV, and other media to expand the franchise's reach and bring consumers back to the core game franchise.

In this special focus topic, we will use our data to gauge the performance of some of gaming's most significant transmedia experiments so far. We focus on how transmedia strategies benefit IP native to games, looking at how game-based movies and TV shows perform but also how they contribute to the engagement of the games they're based on.

Here are the main sections of this special focus topic:



How have recent movies and shows based on gaming IP performed?



The biggest success story so far: The Super Mario Bros. Movie



Video game franchise MAUs before, during, and after transmedia launches

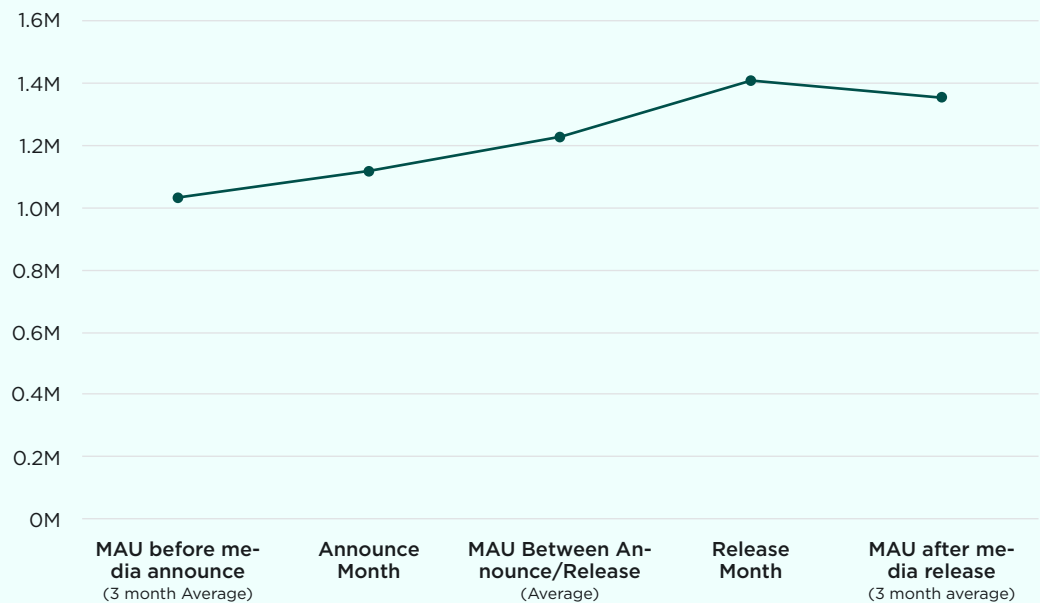


Transmedia rises: The bond between games and other media will continue to grow



Access the entire special focus topics with the full report. [Learn more.](#)

Overall MAU of selected games by media timeline



Live game viewership (esports & live-streaming)

Game viewing is now fundamental for boosting game engagement and fostering communities. Players watch game content to hone their skills, learn how to progress past challenging sections, see the most skilled gamers in action, and more. Live-streamed esports and gaming content are a major gateway to such content globally and have grown into an unmissable marketing channel for game publishers and marketers. Ultimately, game video content helps build a community around a game. An engaged, passionate community is the backbone of any successful game—a combination of fan cohesion across content platforms like Twitch, YouTube, and TikTok, as well as communities on Discord, Reddit, Patreon, and even general social media platforms like Twitter and Instagram. Esports is also a massive part of the equation for competitive games such as League of Legends, CS:GO, Dota 2, and Mobile Legends: Bang Bang.



The esports audience by numbers



The most impactful trends in esports

1. Co-streaming accounted for 45% of MSI 2023's viewership, setting a record for the event
2. Mobile esports continues to fuel audience growth in emerging regions
3. Franchised esports teams reassess their strategy after recent sponsorship deals turn sour
4. New formats experiment with the match between game mechanics and viewership experience



Live streaming and the creator economy



Two impactful trends in live streaming

1. Controversial new sponsorship rules—though retracted—open doors for competition among live-streaming platforms
2. Content creators leverage their role as influencers to diversify their income sources



06

Game Delivery & Monetization

How game delivery and monetization methods have impacted revenues in 2023

Revenue by delivery method

The global games market has become increasingly digital over the past 20 years. Today, the market has almost entirely moved away from physical delivery methods. Mobile's app economy, the games market's biggest revenue generator, is completely digital, and digitalization is also happening on console and PC. Not only are full-priced games moving from physical to digital, but some of the most lucrative and innovative monetization methods—DLC, micro transactions, in-game content, and multi-game subscriptions—are mostly digital by nature. While gamers can still use prepaid gift cards for in-game and platform-specific currency, premium monetization is the last stand for the physical format.

Premium PC games are rarely sold in boxed format, however. In fact, third- and first-party digital stores are so intertwined with the PC games market that the share of boxed revenues on PC has dropped to just 0.5%. What's more, most modern PCs and laptops no longer feature disc drives. Physical PC game releases are mostly reserved for collector's editions, and only a small share of consumers prefer owning physical copies of games. To make matters trickier for the boxed segment, practically every boxed game that comes with a physical disc requires a day-one patch for optimal play. Game boxes increasingly only contain a download code (and therefore no disc at all).

In the complete version of this report, we delve deeper into how delivery methods impact revenue. You will also find revenue figures comparing digital and boxed games from 2021 to 2026.

Revenue by monetization method

Global monetization

Regarding global monetization growth, the highest 2021-2026 CAGR numbers will come from in-game subscriptions and downloadable content such as expansions. Meanwhile, live-service games will continue to be popular, further catalyzing growth on PC and console. Privacy challenges will hinder significant growth in the mobile segment, which will be somewhat offset by growth on console and PC. Multi-game subscriptions will see marginal revenue growth from 2022 to 2026.



PC monetization

Premium revenues on PC dropped rapidly between 2015 and 2019. This is mainly due to the growth of live-service games on the platform and the microtransaction revenues they provide. While expansion packs have been a part of the PC ecosystem since the 90s (and before in some cases) and microtransaction revenues have long been a mainstay of MMORPGs for the segment, the PC market took many lessons from mobile's highly lucrative free-to-play revolution.



Console monetization

Premium console revenues also dropped from 2015 to 2019 but managed to stabilize in 2020 and onward. Battle royale's slowing momentum and live service's growth partially explain this. Second-order effects of the pandemic seem to have slowed premium's decline on console and PC. Live-service's growing popularity on console means this monetization method now accounts for 27% (\$15.3 billion) of console revenues globally. Microtransaction revenues for console are highest in Japan (contributing 33% to the market's console revenues).



Mobile monetization

In the early 2010s, the mobile games market propelled free-to-play monetization into the mainstream, and in-game monetization has accounted for most of the segment's revenues ever since. To that end, revenues from in-game spending will generate a staggering \$89.7 billion on mobile in 2023—97% of the segment's global revenues. The remaining 3% will come from full-game digital revenues, which include mobile versions of popular retro franchises like the early Final Fantasy titles.



Explore our expansive revenue numbers by delivery and monetization method in the full report. [Learn more.](#)



07

**Game Genres
in 2023**

Game genre revenues

In this section, we analyze genre revenues for the global games market in 2023. We compare revenue shares and dollar amounts to 2022 and shine the spotlight on the three major gaming segments: console, PC, and mobile. Each segment has unique dynamics, but one throughline is that the battle royale genre seems to be losing momentum. Beyond that, hit titles across console and PC will lead to some expected increases, while mobile's shifting privacy policies have caused challenges for genres that rely on advertising for user acquisition.

Console genre revenues

The most popular genre for the console segment is adventure, which will account for 17.1% of console revenues in 2023—the same share as 2022. Third-party adventure games based on transmedia IP and remakes have driven—and will continue to drive—the genre's revenues this year, including Hogwarts Legacy, Star Wars Jedi: Survivor, and the highly anticipated high-fidelity remakes of Dead Space and Resident Evil 4. Console platform holders have always leveraged first-party content to acquire players and stand out. Often, these first-party exclusives come in the form of adventure games.

Top 5 console genres by global revenue

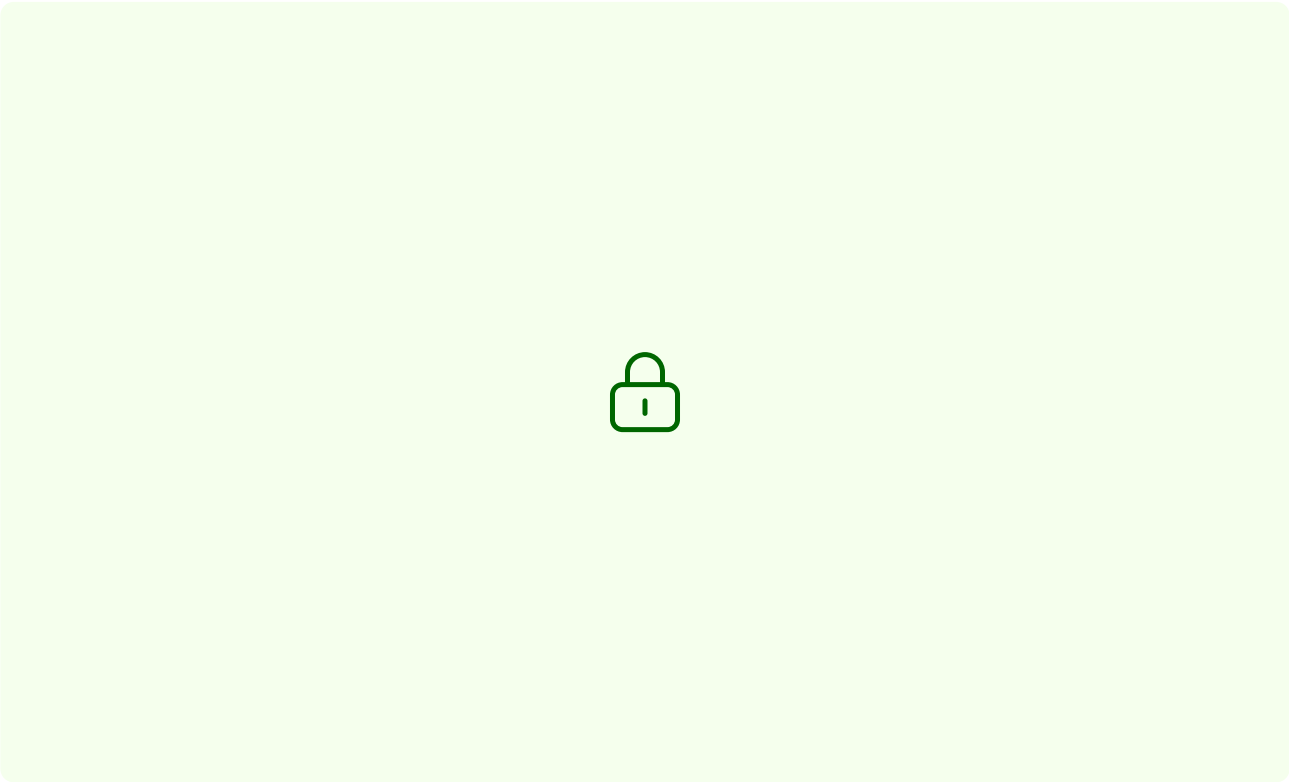
2023



PC genre revenues

PC's top genre by revenues, shooter, which will account for 14.1% of PC revenues (\$5.5 billion) in 2023. Despite its high revenue share, shooters will still grow +4.9% year on year. The genre's regular PC heavy hitters like Valorant, Counter-Strike: Global Offensive, a yearly Call of Duty release, and Escape from Tarkov will be bolstered by several new single-player and multiplayer shooters (mostly the latter). These include Payday 3, S.T.A.L.K.E.R. 2: Heart of Chernobyl, Warhammer 40,000: Boltgun, and Resident Evil.

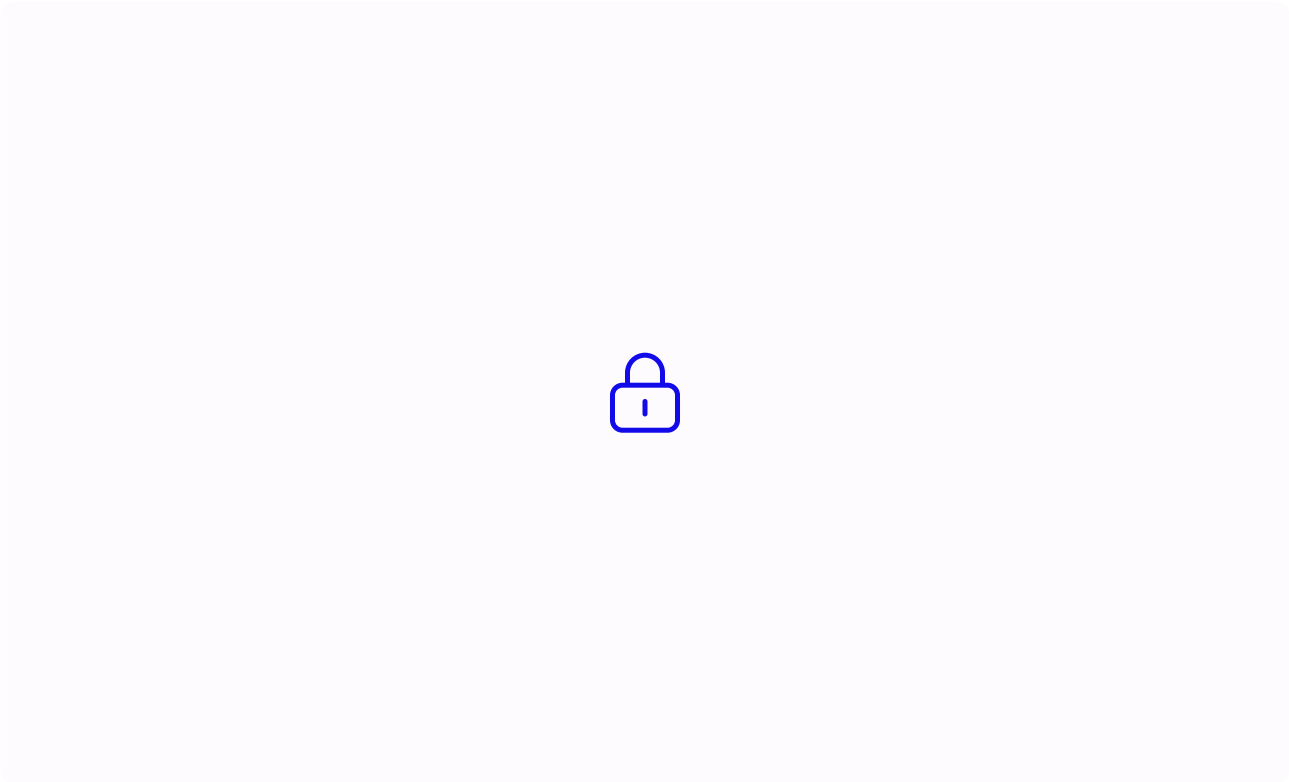
Top 5 PC genres by global revenue 2023




Mobile genre revenues

The mobile market has had some growing pains in monetization and user acquisition (UA) this year, thanks to ongoing privacy changes from Apple and Google. The UA effects of these changes are apparent in the segment's genre revenues, with some key mobile genres seeing a year-on-year drop. This is true of mobile's biggest genre by revenues, RPG, which will see a year-on-year drop. Still, the genre will account for 23.1% of mobile revenues and over a tenth of the global games market.

Top 5 mobile genres by global revenue 2023





For more in-depth revenue figures and forecasts by genre, check out the complete report. [Learn more.](#)



08

The Games Market per Region & Country

Five regions & 35 countries/markets

Together, the 35 countries/markets included in this report represent more than 90% of global game revenues. The country/market data in the full report comes mainly from our global games market predictive model, incorporating over 50 KPIs for all countries/markets. The country/market pages also include input from our primary consumer research, the Global Games Study 2023, conducted from February to May 2023 and featuring more than 74,000 respondents across 36 key countries/markets. In the full report, you'll find key facts like revenues, player numbers, the average spend per paying gamer across all segments, and revenue forecasts toward 2026.

| North America | Latin America | Europe | Middle East & Africa | Asia-Pacific |
|--|--|--|--|---|
|  Canada |  Argentina |  Belgium |  Egypt |  Australia |
|  United States of America |  Brazil |  Finland |  Saudi Arabia |  China |
| |  Chile |  France |  South Africa |  India |
| |  Colombia |  Germany |  Turkiye |  Indonesia |
| |  Mexico |  Italy |  United Arab Emirates |  Japan |
| | |  Netherlands | |  Malaysia |
| | |  Poland | |  New Zealand |
| | |  Spain | |  Philippines |
| | |  Sweden | |  Singapore |
| | |  United Kingdom | |  South Korea |
| | | | |  Taiwan |
| | | | |  Thailand |
| | | | |  Vietnam |



Learn more about the games market per region & country with the full report.



09

About Newzoo



About Newzoo

Newzoo is the global leader in video games and gamer data, providing the most comprehensive view of the games ecosystem: the games, the gamers, and the games market.

Know the Games

 GAMES DATA

Game Performance Monitor

Unlock title-level engagement and revenue data for thousands of PC and console games.

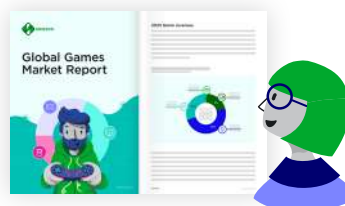


Know the Games Market

 MARKET ANALYSIS & CONSULTING

Market Reports & Forecasts

Discover games market sizing, forecasts, and trends on a global and local level.



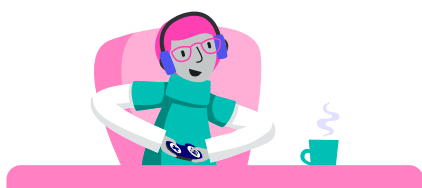
+ Consulting & analyst services

Know the Gamers

 GAMER RESEARCH

Global Gamer Study

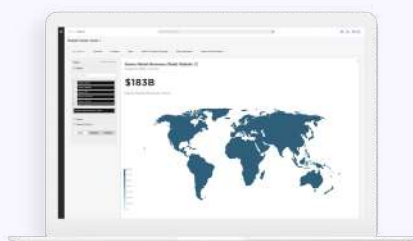
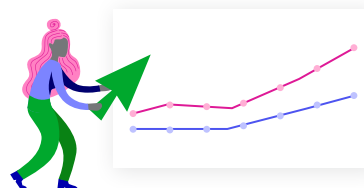
Explore the global gamer audiences across all dimensions with the largest gamer research study.



+ Custom gamer research, designed just for you

Game Health Tracker

Track brand health and purchase funnel data over time for hundreds of games.



The Newzoo Platform

Access data on the entire games market and build your own research using one seamless platform. Get expert insights on games, gamers, and the games market, and work with our consultants to create custom projects.



10

Upgrade to
the Full Report

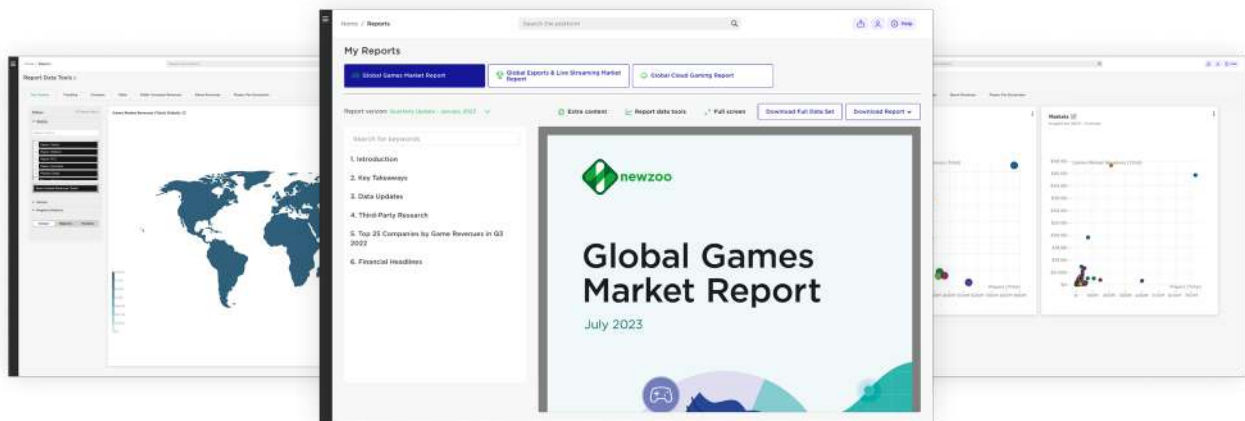
Upgrade to the Full Report

2023 Global Games Market Report

With this comprehensive report and subscription, you can understand the latest trends in gaming, size your market, prioritize your game's global rollout, and set realistic growth targets.



The full, 150 page PDF



Access to all metrics via the Newzoo platform

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“ Newzoo’s analysis provides a greater understanding of key trends within the industry and how best we can apply that insight for a competitive advantage within our product portfolio. ”

Solomon Foshko | Director of Strategic Intelligence and New Product Analytics at Wargaming



Comparison table: Upgrade to the full report

| | Free Report | Full Report |
|--|-------------------|--|
| Report length | 52 pages | 150 pages |
| Quarterly Updates | | ✓ |
| Access to all metrics via the Newzoo Platform | | ✓ |
| Games market sizing and forecasts per 5 regions & 35 countries/markets | | ✓ |
| Downloadable Excel Dataset | | ✓ |
| Build your own graphs and views | | ✓ |
| Full access to the 7 global trends | | ✓ |
| 1. Live Service Saturation on PC & Console | Preview | Full 4-page trend |
| 2. Generative AI's impact on Game Development | Full 3-page trend | Full 3-page trend |
| 3. Complimentary Gaming Devices | Preview | Full 3-page trend |
| 4. Mobile Gaming Strategies and Privacy Regulations | Preview | Full 4-page trend |
| 5. Influencer-led Game Development and UGC | Preview | Full 3-page trend |
| 6. The State of VR | Preview | Full 5-page trend + 2 charts: VR market sizing |
| 7. Regional Trends in China, Japan, and Saudi Arabia | Preview | Full 4-page trend + 4 charts: games approved in China |
| Full access to the 2 special focus topics | | ✓ |
| 1. Impact of Transmedia Efforts on Engagement with Gaming IP | Preview | 6 pages + 3 charts: the performance of some of gaming's most significant transmedia experiments so far |
| 2. Audience Size and Trends for Game Viewing, including audience estimates 2019-2026 | Preview | 10 pages + 5 charts: the most impactful trends in esports and live-streaming |
| Game Delivery & Monetization New | Preview | ✓ |
| Game Genres in 2023 New | Preview | ✓ |
| A weekly Analyst Feed on the latest developments in the global games market including esports, live streaming, cloud gaming, metaverse, and others | | ✓ |
| Access to many more unique insights through our platform | | ✓ |

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