MARKET INSIGHTS

* Newzoo’s Global Games Market Report (2024) reports a **51%** market share for console and PC games altogether. PC market share showed the strongest sector growth in relative terms with **+4.0% YoY growth.** Mobile had the biggest share in real terms with **49%.** They report that console’s market share reduced marginally by **-1.0% YoY** in 2024.
* Newzoo’s Global Games Market Report (2024) predicts stronger growth for **console** market share, and reports a recent post-pandemic decline in market share for **mobile** gaming, predicting that its market share will continue to fall over the current period through 2027.
* Newzoo’s Global Games Market Report (2024) reports a difficult market for AAA and live-service games. Reasons cited include **declining playtime, diminished user-base, saturated live-service market,** and **exorbitant cost of producing games at AAA scales.** They report that this has created market gaps for **indie development** and **AA** games.
* Newzoo’s Global Games Market Report (2024) reports that by PC game genre, **shooter/action** games have the biggest market share at **17%.** The second biggest genre by market share is **adventure games**, accounting for **13%.** However, **YoY** **market share** **growth** for **adventure games** far outstripped **action/shooter games,** at **+21.2%** to **action/shooter’s +9.6%** in 2024. This growth is reflected in the **console market** too, with **adventure games (15% market share) 13.6% YoY growth** outstripping **action games’ (16% market share) +6.0 YoY growth.**
* In terms of Steam purchase revenues, this is reflected in VG Insights’ (2025) Steam Genre Rankings metric which shows that Adventure games’ revenue for the last year (**$28.2bn)** are second only to Action genre **($42.1bn).** This high ranking demonstrated that the Adventure genre holds a significant share of the Steam market, making it financially promising.
* According to Houlihan Lokey (2024), 2023 saw mobile gaming’s revenue for a second year, which was attributed to **inflationary pressures**.

MARKET OPPORTUNITIES

* When Google for Games’ (2022) PC & Console Insights Report respondents were asked what ‘trends’ they currently interact with, players cited **cross-platform gameplay** as the most frequent reason. **AR, VR** and **Esports** each were engaged with only by just over a quarter of respondents each respectively.
* VG Insights (2025) Steam Genre Supply-Demand metrics for PC games show that **Action, Adventure** and **Casual** games were the most well supplied genres, and each showed a large market share compared with other genres, indicating potential for high returns.
* According to Brain & Company (2024), gamers increasingly **identify with games themselves as opposed to platforms**, which is actively forcing games publishers to develop new growth strategies. Game developers are taking advantage of this change away from platform exclusivity by **pursuing cross-platform integration** and **pursuing larger player bases** this way.
* **70%** of gamers play on multiple devices. This is the emergence of a long-predicted change to a platform-agnostic industry. **8 out of 10 top games** are playable on multiple platforms in 2023. (Brain & Company, 2024).

CONSUMER PERSONAS

* Over half of PC and console players surveyed in Google for Games’ (2022) *PC & Console Insights Report* believe it’s very or extremely important that games are localised to their country or region.
* Google for Games’ (2022) *PC & Console Insights Report* respondents most often cite **favourable genre** and **interesting storytelling** as reasons to try new games.
* In GamingScan (2025)’s aggregate report, Gaming Industry Statistics, Trends & Data, factors most often cited as influencing the decision to purchase a game include **quality of the graphics, price point,** and an **interesting story.**
* According to GamingScan’s (2025) aggregate report, gamers over the age of **18** represent **70%** of the market. Adult women **(33%)** represent roughly double the market share **(17%)** of males under 18.
* According to GamingScan’s (2025) aggregate report, approximately **three-quarters** of video game players would say that they **prefer single-player games** over multi-player games. On the contrary, **only 3%** of gamers say they **prefer multi-player games** over single-player ones. The remainder gave no preference.
* According to GamingScan’s (2025) aggregate report, **females aged** **18-34** report **Adventure** and **Casual** games as their favourite genre. As a whole, the demographic most often cited **Tomb Raider, Assassin’s Creed** and **Candy Crush** as their favourite games.
* According to GameTree (2019), in terms of gender, **female players** more often cited preference for **any other console and mobile** over PC. On the contrary, **male players** most often cited PCas their preference.
* In terms of age bracket, GameTree (2019) report that **18-22** age bracket most often prefer PC play over consoles and mobile. In terms of the **23-27** age bracket, PC, tabletop and all consoles were most preferred, over **mobile, with least preference.** In terms of **28-32** age bracket, the **same can be said**, with a **more pronounced preference for consoles** **over mobile devices.**
* In terms of broad popularity, **Action, Adventure** and **RPG** were most often cited in a report by GameTree (2019) as being the most popular, all with over **2/3rd** of the market expressing interest in those genres.
* In terms of gender, GameTree (2019) reports **Casual** and **Adventure** as genres preferred by female gamers, and **Action** was most preferred.
* According to Google for Games’ (2023) Global Insights Diversity Equity & Inclusion Report, participants most often prefer **single-player missions/levels (approximately half of respondents across all regions).**
* According to Google for Games’ (2023) Global Insights Diversity Equity & Inclusion Report, **Action (66%) and Adventure (41%)** were cited as the most often played genre of games by gamers of all regions.
* According to Cognitive Market Research (2025), **adventure games market share in percent** is predicted to increase steadily across all regions through the current period through 2033. The **North American market** is largely responsible for this projected increase, with **Europe** behind.

RISK AND THREAT MITIGATION

* When Google for Games’ (2022) PC & Console Insights Report respondents were asked how much money they had spent on games in the six-month period prior, at least **38%** of respondents reported having spent **no money at all**. Another **47%** of respondents reported having spent a maximum of **$49.99.** Another **13%** of respondents reported spending from **$49.99 - $499.99** and the remaining **2%** reported spending upward of **$500.00**. Quantities and reasoning behind spending patterns were not asked after, however.
* When Google for Games’ (2022) PC & Console Insights Report respondents were asked what keeps them interested to continue to play a particular game, respondents cited **fun gameplay, engaging story** and **balanced challenge** most frequently.
* When Google for Games’ (2022) PC & Console Insights Report respondents were asked what factors cause them to quit playing a particular game, **unenjoyment, too many bugs/glitches/crashed lost data, too many/too intrusive advertisements, pay to win** and **costs too much to progress** were most frequently cited.
* According to Houlihan Lokey (2024), 2023 saw mobile publishers facing a difficult market in terms of **expanding their user base** and **monetising users**.
* According to Houlihan Lokey (2024), in 2023 mobile developers were attempting to assuage **market pressures** with **cross-platform integration.**

COMPETITOR IDENTIFICATION

* According GDC State of the Games Industry (2024), **approximately half** of game developer respondents say they are **implementing accessibility measures** into their games. Of those most frequently cited, **closed captioning, colourblind modes, control remapping, custom audio settings, content warnings** and **adjustable difficulty levels** are most likely to be implemented by games developers in their current products.

HISTORICAL PRODUCT BENCHMARK ANALYSIS

COMPETITOR CASE STUDIES

MONETISATION

* In Google for Games’ (2022) PC & Console Insights Report, more than half of respondents say they **often** or **sometimes** preorder an upcoming game, citing the **desire to play as soon as possible**, getting **exclusive in-game items**, benefitting from **discounts or sales** most frequently.
* When Google for Games’ (2022) PC & Console Insights Report respondents were asked what players have spent their money on in the six-month period prior, they most often cited **in-game currency**, **customising appearance and items of characters,** and **unlocking special/new items and/or characters** in their justifications.
* When Google for Games’ (2022) PC & Console Insights Report respondents were asked why they make purchases within games using real money, **progressing more quickly**, **accessing higher quality/new experiences/content**, **reaching personal goals** and **taking advantage of a sale or other promotion** were most often cited.
* Newzoo’s Global Games Market Report (2024) summarises industry research that shows **58%** of PC players **buy games on sale or promotion**. This makes it the second largest purchase motivation behind **65%** of PC players citing **unlocking exclusive/extra content.**
* VG Insights (2025) Steam Genre Supply-Demand metrics for PC games shows that **Adventure** games have the highest average revenue of the three most well-supplied genres (Action, Casual and Adventure). Extrapolation: while some genres (Casual or Sports) are less well supplied than Adventure and Action games, their total revenues are far smaller, offering fewer opportunities for high returns. Of the three most well supplied genres, Adventure genre has the most balanced market position.
* In VG Insight’s (2024) PC Games Industry Report, one of the four of 2023’s top games trends is reported to be **a lack of microtransactions,** with **no top releases** by full game revenue employing them.
* According to GamingScan’s (2025) Gaming Industry Statistics, Trends & Data, steam remains the top platform for servicing PC players.
* According to Gaming Scan’s (2025) Gaming Industry Statistics, Trends & Data, just over **one third** of **($18bn total)** revenues in 2022 for PC and console games were for **additional content ($6.5bn)**.
* According to GDC State of the Games Industry (2024), when games developers were surveyed on their business model for current products, **digital premium games, free to download games, DLC/updates, physical premium games, paid in-game items** were most often cited as implemented in current products.

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