Free Version

2025

Global Games Market Report

Updated November 2025

Contents

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Foreword

A new chapter

This year's free edition of the Global Games Market Report marks a personal milestone, my first edition as Newzoo's Director of Market Intelligence. Over the past few months, I've had the privilege of working alongside our team of seasoned experts, whose deep market knowledge and dedication have shaped every page of this report. Together, we've refined our approach to make this report more relevant, insightful, and valuable.

Our focus has been on quality over quantity. We've aimed for clarity, impactful storytelling, and a strong balance between narrative, data, and visuals. Rather than covering too many things at a surface level, we've chosen five main topics to explore in greater depth. This approach delivers richer, more strategic perspectives that capture both the current state of the market and its forward-looking trends.

As always, the report is built on strong data and designed for an engaged, professional audience; readers looking for answers to the questions that will guide their decisions in a fast-changing industry.

This year's Global Games Market Report marks the start of a new chapter, one with sharper focus and deeper insights.

We're excited for you to read this year's free edition and, as ever, we welcome your feedback.

Excelsior!

Emmanuel Rosier
Director of Market Intelligence

Foreword

We are excited to welcome you to this year's free edition of the Global Games Market Report, Newzoo's premier publication and guide to our platform's Games Market Reports & Forecasts tool.

This report is designed to help you navigate a market where growth is harder won, but where opportunities abound for those who act. Whether you're seeking to benchmark performance, spot emerging trends, or plan your next move, we hope you find the clarity, depth, and strategic angle you need.

Finally, I want to thank the Newzoo team for their dedication and expertise in making this report come alive.

Key themes this year:

- ✓ **Moderate audience growth:** The global player base will reach 3.6 billion in 2025 (+4.4% YoY), but the share of the online population playing games is plateauing. Payer growth (+4.9%) continues to outpace revenue growth, leading to a slight decline in average spend per payer.
- ✓ **Low to moderate all-round growth**: Still, 2025 will bring some growth, with all platforms expected to see between 2% and 6% YoY growth in players and/or revenues. The market remains resilient and full of opportunity for those who adapt.
- ✓ **Platform dynamics:** PC and console are, or will, see renewed momentum, with PC player growth outpacing mobile and console. Cross-platform releases, new hardware cycles, and the anticipation of titles like *Grand Theft Auto VI* are reshaping the competitive landscape.

The paid version of the report includes five detailed special focus topics. Over the coming months, we will share extracts of three of these topics. The five topics we analyzed are:

- ✓ **Remakes and remasters**: Reviving classic IPs has become a proven strategy for extending franchise lifecycles, generating reliable revenue, tapping into nostalgia, and strengthening brand value.
- ✓ **Release timing and launch strategies**: The timing of a game's release, early access period, and platform exclusivity are crucial in maximizing player engagement and sales.
- ✓ **Game pricing and value perception**: Pricing, genre, and content length are key factors in how players perceive value. As development costs rise, publishers must carefully balance accessibility, profitability, and player expectations.
- ✓ **Post-launch content and long-tail monetization**: DLC, expansions, and ongoing updates are essential for sustaining engagement and revenue and helping to extend the commercial life of new games and remasters.
- ✓ **Roblox, UGC, and the platform ecosystem**: The growth of *Roblox* and user-generated content is reshaping how players engage and how IP is built, signaling a shift toward more creator-driven, platform-centric models in the industry.

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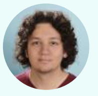

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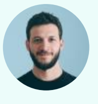

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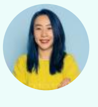

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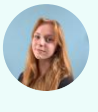

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Jr. Designer

What’s in this report

The free Global Games Market Report 2025 is a preview of Newzoo’s Games Market Reports and Forecasts subscription. In these pages, you’ll find:

- ✓ The overall growth of the global games market in 2025, with an outlook through 2028.
- ✓ Our global total player and total revenue forecasts from 2022 to 2028.
- ✓ Platform-level revenue forecasts (PC, console, mobile) through 2028.
- ✓ Extracts of three analyses of the special focus topics, which we will release monthly:
    - September: **Modernizing release windows: Data-driven launch insights** — release timing, early access best practices, and how attrition unfolds after launch.
    - October: **Unboxing Roblox: User trends, genre insights, and strategic fit** — how Roblox’s creator-driven ecosystem opens new opportunities for traditional game developers.
    - November: **The long game: How post-launch content fuels engagement** — how standalone titles evolve with live-service-like strategies.
- ✓ Our methodology, terminology, and data coverage.

This report is updated quarterly, so be sure to check back to the Newzoo website for new key estimates and forecasts.

Subscribe to our Games Market Reports and Forecasts for the complete picture

This free edition is a condensed version of our annual flagship market report, available on the Newzoo Platform as part of the Games Market Reports and Forecasts subscription, which also contains all the data and a powerful toolkit for visualizing and analyzing it.

Newzoo’s complete Games Market Reports and Forecasts includes:

- ✓ The full 199-page edition of the Global Games Market Report 2025 and three quarterly updates with up-to-date market estimates and forecasts.
- ✓ Region- and country-level data for 100 markets, including revenues and payers, big spenders, and highly engaged players per platform.
- ✓ The complete dataset available as an Excel file, updated quarterly.
- ✓ Key statistics on seven game ecosystems: Steam, Epic Games Store, PlayStation, Nintendo, Xbox, Android, and iOS.
- ✓ Data-driven insights into the essential market trends and more in-depth topics shaping the future of our global ecosystem, updated quarterly.
- ✓ Report Data Tools for analyzing the dataset across more than 50 metrics.
- ✓ Dedicated client support and market analysts to help you navigate the insights.

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Explore the data and insights powering this report

We use data from our product portfolio and proprietary sources to inform our market analysis and industry expertise.

GAMES DATA

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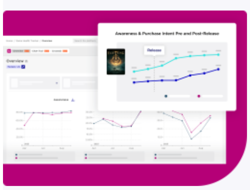
Unlock title-level engagement and revenue data for thousands of PC and console games.

GAMER RESEARCH

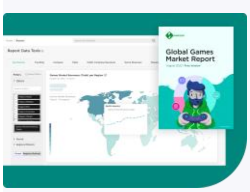
Global Gamer Study

Access the largest and deepest gamer survey in the world, profiling tens of thousands of gamers worldwide yearly.



Game Health Tracker

Track title-level demographics, consumer insights, and weekly awareness, hype, and purchase intent.



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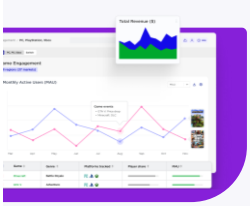

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01

The global games market

The global games market

Key takeaways

2025 will see moderate but stable growth in both players and payers, especially in mobile-first emerging regions, but the global market is still maturing. The focus continues to shift to retention and more innovative monetization, with payer growth outpacing revenue growth, a slight decline in average spend per payer expected through 2028.

✓ **The global player base is projected to reach 3.6 billion in 2025 (+4.4% YoY),** representing 61.5% of the world's online population. The total player share relative to the online population will stagnate.

- **PC:** 936 million players, up 3.1% year on year
- **Console:** 645 million players, up 2.5% year on year
- **Mobile:** 3.0 billion players, up 4.5% year on year

✓ Based on Newzoo's Global Gamer Study, **Gen Alpha (born 2010+) is an increasing share of the player base**, especially on PC.

✓ **Global Steam players will continue to outgrow the larger PC player population** with momentum in China and Japan.

✓ **Total global revenue is expected to reach $188.8 billion in 2025 (+3.4% YoY)**

- **PC** revenues will reach $39.9 billion (+2.5% YoY), driven by continued player growth, especially in China and Japan, and a strong release slate in H1 and upcoming titles in H2.
- **Console** revenues are forecast at $45.9 billion (+5.5% YoY), with growth fueled by the launch of new hardware (Nintendo Switch 2), higher software prices, and major releases.
- **Mobile** revenues will hit $103.0 billion (+2.9% YoY), with the strongest growth in mobile-first growth regions but lower growth in Asia-Pacific. The Western markets are adapting to new direct-to-consumer models, while regulatory changes impact business worldwide.

The premium edition of this report, available as part of a Games Market Reports and Forecasts subscription, goes further into detail on these figures, while also providing the latest estimates and forecasts by region, business model, and game genre, as well as the top titles per genre.

Players and payers

Players

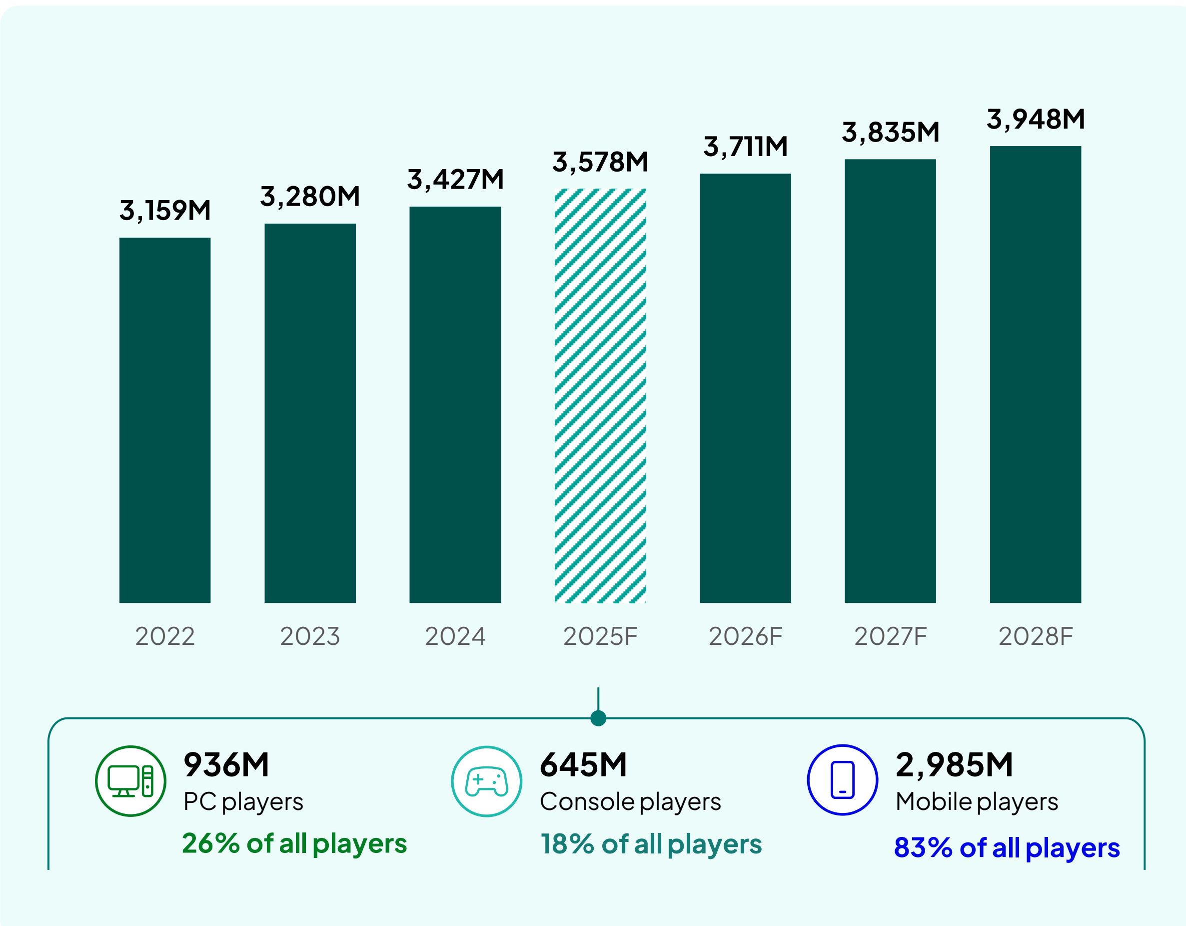
2025 Total players

3.6 billion (▲ 4.4% YoY)

- ✓ The total number of players is expected to slightly outgrow the online population, which is expected to grow by 3.8% year over year to 5.8 billion in 2025. **This means that 61.5% of the global population with internet access will play games** on at least one platform, with most players on mobile devices.
- ✓ Between 2025 and 2028, the average total player and online population growth is expected to be 3.3% annually. The **total player share relative to the online population will stagnate**, confirming the games market's maturity and the necessity of retaining and monetizing the existing audiences.

Global player forecast

2022 – 2028F



2025 PC players

936 million (▲ 3.1% YoY)

26% of all players

- ✓ The steady PC player growth is only slightly below last year's 3.4%. It is expected to grow with **a 2.9% CAGR between 2025 and 2028**, higher than the 2.1% CAGR between 2022 and 2025.
- ✓ **The global Steam players have and will outgrow the larger PC player population with momentum in China and Japan**. Both outpace the more saturated Western regions.
- ✓ *Epic's Year in Review* data showed a **gradual slowdown in net new user adoption**, indicating the platform is entering a more mature growth phase.

2025 Console players

645 million (▲ 2.5% YoY)

18% of all players

- ✓ With 2.5% growth in 2025, **it is the slowest-growing platform**, as it is mostly saturated.
  - **There is growth in platform overlap for all three platforms among those born after 1981.**
- ✓ **Player growth in the traditional console markets is expected to be low**, whereas China's smaller market is poised for more growth. After two years of decline, we expect **modest growth in Japan** due to the launch of the Nintendo Switch 2.
- ✓ **Similar player growth is expected for 2026 when *Grand Theft Auto VI*** is scheduled to launch. The game is expected to lead to an increased upgrade rate for the PlayStation 5 and Xbox Series X|S among existing players and lapsed gamers waiting for a reason to buy a new device and return.

2025 Mobile players

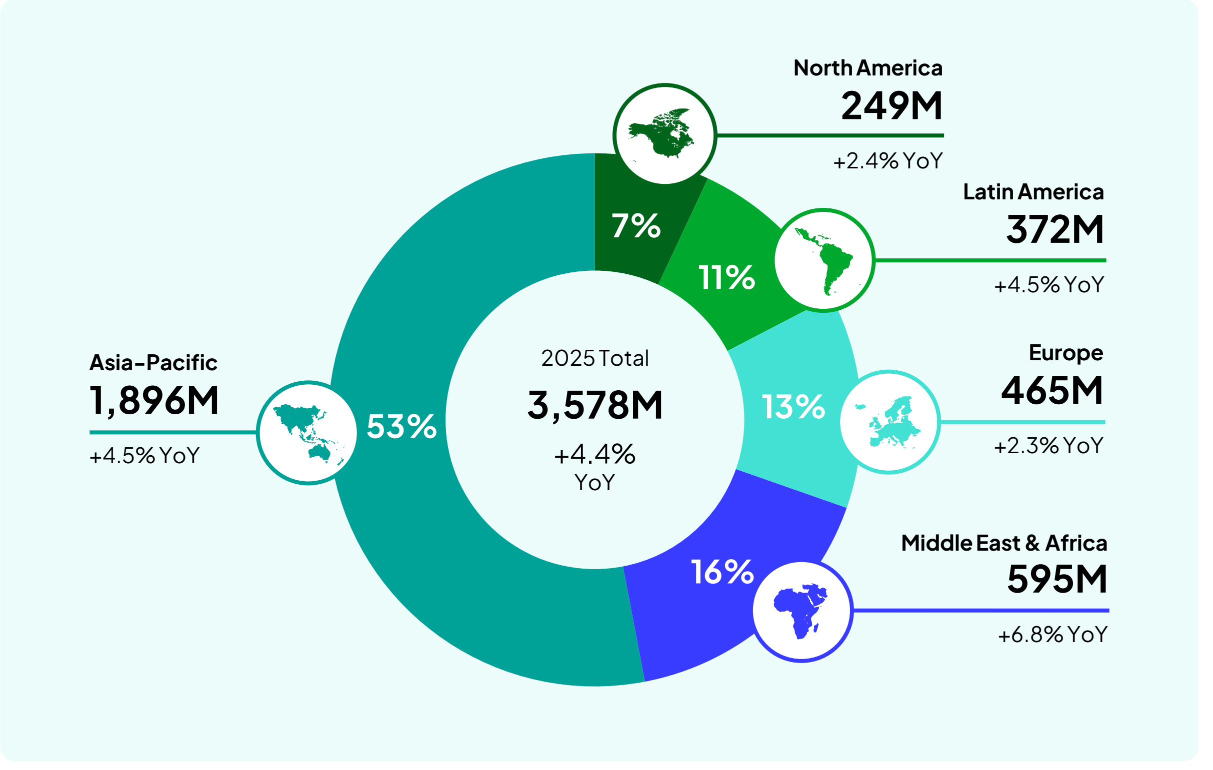
3.0 billion (▲ 4.5% YoY)

83% of all players

- ✓ **Mobile-first regions are still a growth engine**, but mobile player growth in Canada, most of Europe, and Oceania should not be ignored. Player growth in the United States will lag, while player numbers in France, Italy, and Poland look like they will slightly contract.
- ✓ **Economic pressure, slower upgrade cycles, and aggressive mid-range Android competition** erode iOS share in key markets like Brazil, Mexico, France, and even the U.S., where its growth has plateaued.
- ✓ Meanwhile, **Chinese OEMs like Xiaomi and Realme are expanding rapidly**, leveraging affordability, local manufacturing, and retail saturation to capture mobile players across Europe, the Middle East & Northern Africa, and Southeast Asia.

Total players by region

2025F



Global player growth is expected to be around 4.4% to 3.6 billion players.

- ✓ **Latin America and Asia-Pacific are expected to grow on par** with the global player base, both up by 4.5% year over year. In Latin America, all platform players will grow, but console will lag. Whereas in the Asia-Pacific, local nuances exist.
- ✓ Growth in mature **North America and Europe is expected to slow to around 2.3%** this year, slightly down compared to 2024. Lower population growth and an aging population limit growth.
- ✓ Mobile-first **Middle East & Africa will outgrow the other regions with 6.8% year over year**, but growth is more widely spread across the different platforms.

Payers

2025 Total payers

1.6 billion (▲ 4.9% YoY)

44% of total players

- ✓ **The willingness to spend keeps growing** among the global gamer population.
- ✓ With the 4.9% growth this year, it is outpacing the 4.4% total player growth.
- ✓ Total revenues are expected to grow 3.4% in 2025 to $188.8 billion, and **the average spending per paying gamer will be $119.7**.

Get the full 7-year forecast for PC, console, and mobile payers with Newzoo's Games Market Reports and Forecasts subscription.
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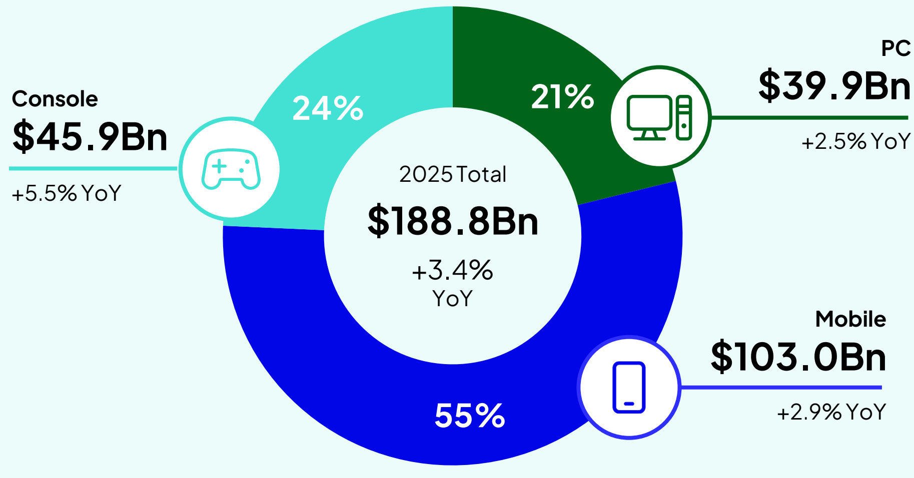
Revenues

The global market by platform

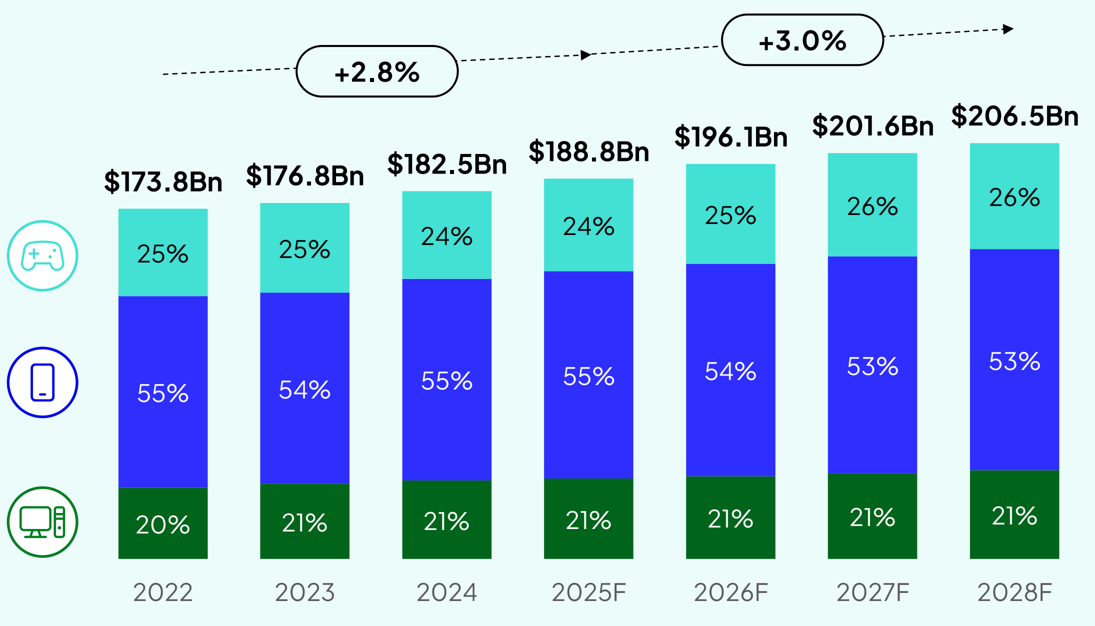
Global revenue by platform

2025F



Global revenue by platform

2022 – 2028F



CAGR	Console	Mobile	PC
’22–’25	2.0%	2.7%	4.1%
’25–’28	4.7%	2.2%	3.3%

2025 PC revenues

$39.9 billion (▲ 2.5% YoY)

21% of total revenues

The global PC market is projected to grow by 2.5% to $39.9 billion in 2025. While the smaller Middle East and Africa will grow the fastest, Asia-Pacific is projected to grow by 3.1%.

Growth drivers:

- ✓ **China is expected to grow by 3.1% YoY in 2025**, driven by expanding Steam adoption, full-year revenue from popular 2024 releases, returning Activision Blizzard titles, and esports engagement.
- ✓ **Growth is expected due to a richer H1 release slate**, compared to the same period last year, including highly anticipated and acclaimed titles like *Monster Hunter Wilds*, *Kingdom Come: Deliverance II*, *Assassin's Creed Shadows*, and multiple smaller titles.

Challenges:

- ✓ Despite strong new releases in early 2025, overall **revenue was tempered by the continued success of 2024 hits** *Palworld* and *Helldivers 2*, which performed strongly during the same time last year.
- ✓ **Long-standing live-service games** (e.g., *League of Legends*, *Rainbow Six: Siege*, and *Apex Legends*) **declined**, while growth for *The Sims 4* and *Counter-Strike 2* could not fully offset the downturn.

2025 Console revenues

$45.9 billion (▲ 5.5% YoY)

24% of total revenues

The global console market is projected to grow by 5.5% YoY to $45.9 billion in 2025. Asia-Pacific, driven by Japan, will see the fastest growth. North America is expected to grow by 5.4% YoY.

Growth drivers:

- ✓ **The Nintendo Switch 2 launch** boosted global revenues after Nintendo's late-cycle slowdown.
- ✓ Despite a light-looking content lineup, **higher software prices** (e.g., *Mario Kart World*) will enable revenue growth.
- ✓ Growth is strongest in regions where Switch has been popular, like **Eastern Asia and France**.
- ✓ 2025 features major releases like, but not limited to, *Monster Hunter Wilds*, *Kingdom Come: Deliverance II*, *Mario Kart World*, and *Pokémon Legends: Z-A*.

2025 Mobile revenues

$103.0 billion (▲ 2.9% YoY)

55% of total revenues

The global mobile market growth is projected to slow to 2.9% and reach $103.0 billion in 2025. Asia-Pacific is expected to grow by 1.5% year on year. Off-app store traffic is expected to grow, and D2C monetization will improve and diversify. This changes revenue distribution but does not lead to market growth.

Growth drivers:

- ✓ **Top-grossing 2024 titles are expected to perform well** in 2025, though some slowdown is likely as titles age.
- ✓ ***Roblox* continues strong growth into 2025**, with its discovery algorithm now rewarding social play.
- ✓ **Match & Merge games remain highly successful**, especially in North America. *Royal Match* and *Royal Kingdom* are off to a strong start. *Match Factory* and Merge titles like *Gossip Harbor, Seaside Escape*, and *Travel Town* are also growing.
- ✓ **New and upcoming releases** such as *Delta Force Mobile*, *Once Human Mobile*, *VALORANT Mobile*, and *Umamusume: Pretty Derby (English version)* **are and will drive engagement and downloads**.

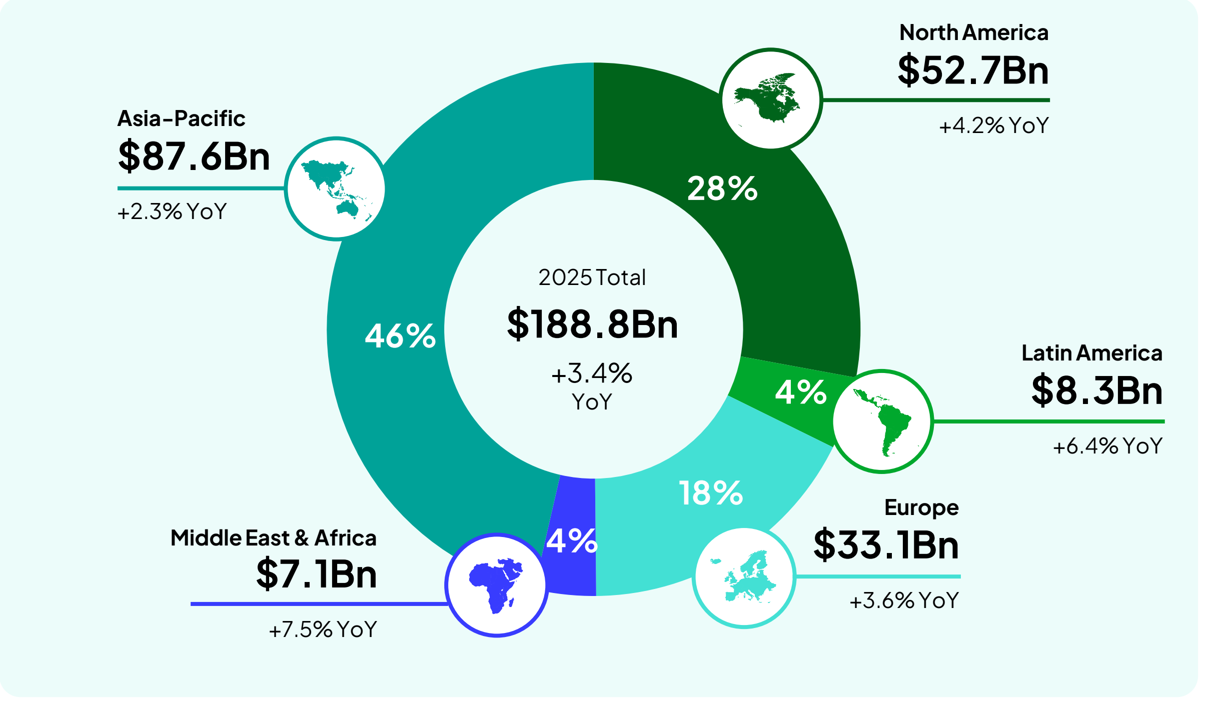
Challenges:

- ✓ Discoverability remains a major issue as app stores and web shops are flooded with new games. In addition, **content is increasingly scattered across platforms**, which may eventually lead to more curated catalogs.

The global market by region

Global revenue by region

2025F



Get the full 7-year forecast per region with Newzoo's Games Market Reports and Forecasts subscription.
Take the product tour

Genre revenues

Genre revenues

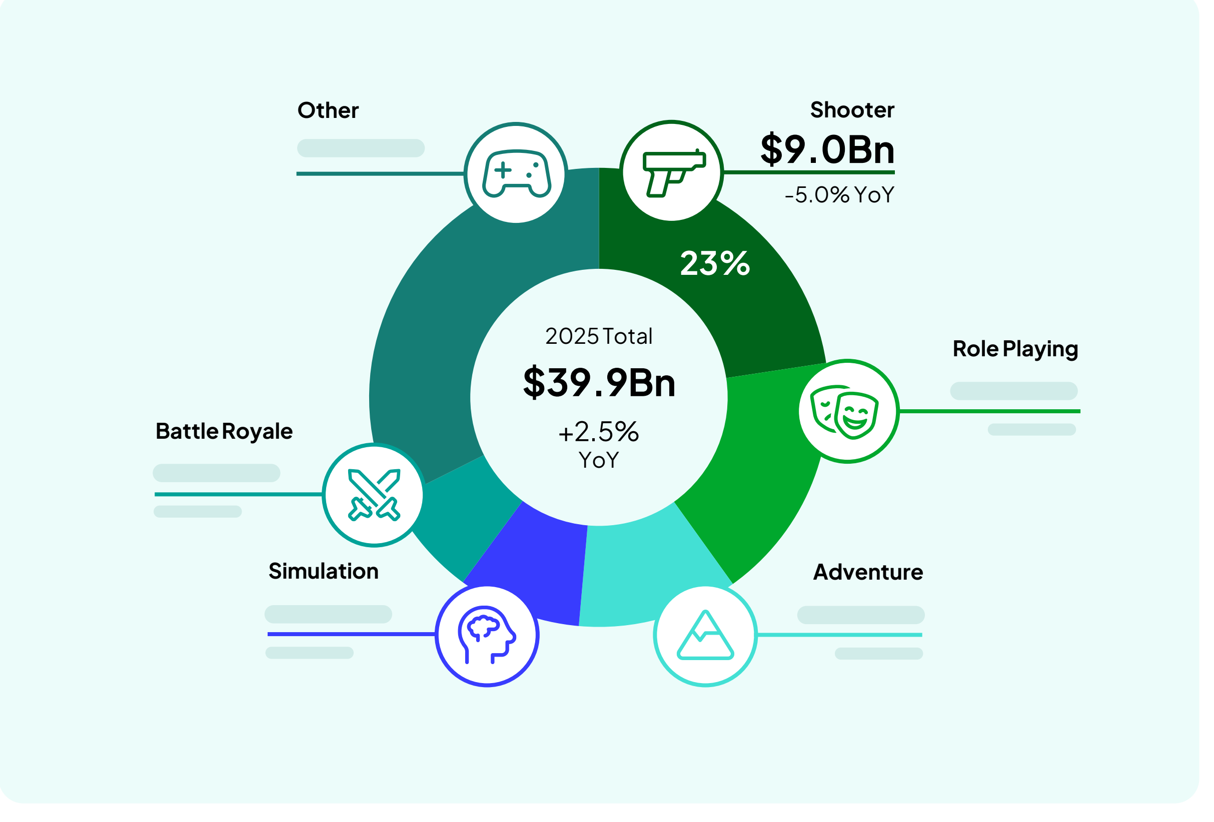
This section explores how genre revenues in the global games market evolved in 2025. It compares revenue shares and dollar amounts (in USD) with those from 2024. It also includes top titles tables for each genre by platform, highlighting some of the biggest revenue contributors.

PC genre revenues

The global PC market is expected to reach $39.9 billion with a projected growth rate of 2.5%. While some genres experienced growth driven by a few hit titles, this often came at the expense of others. Compared to console, PC revenues by genre are less concentrated.

Global PC revenues by genre

2025F



Get even more PC revenue and growth figures per genre with Newzoo's Games Market Reports and Forecasts subscription.
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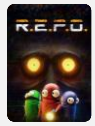
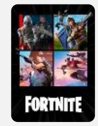
Top 5 PC titles per genre by revenue

PC | 6 markets | January – June 2025

	Shooter	Role Playing	Adventure	Simulation	Battle Royale
1	Counter-Strike 2 & GO 	Monster Hunter Wilds 	R.E.P.O. 	The Sims 4 	Fortnite 

Full Access

Source: Newzoo Game Performance Monitor – Revenue Add-on

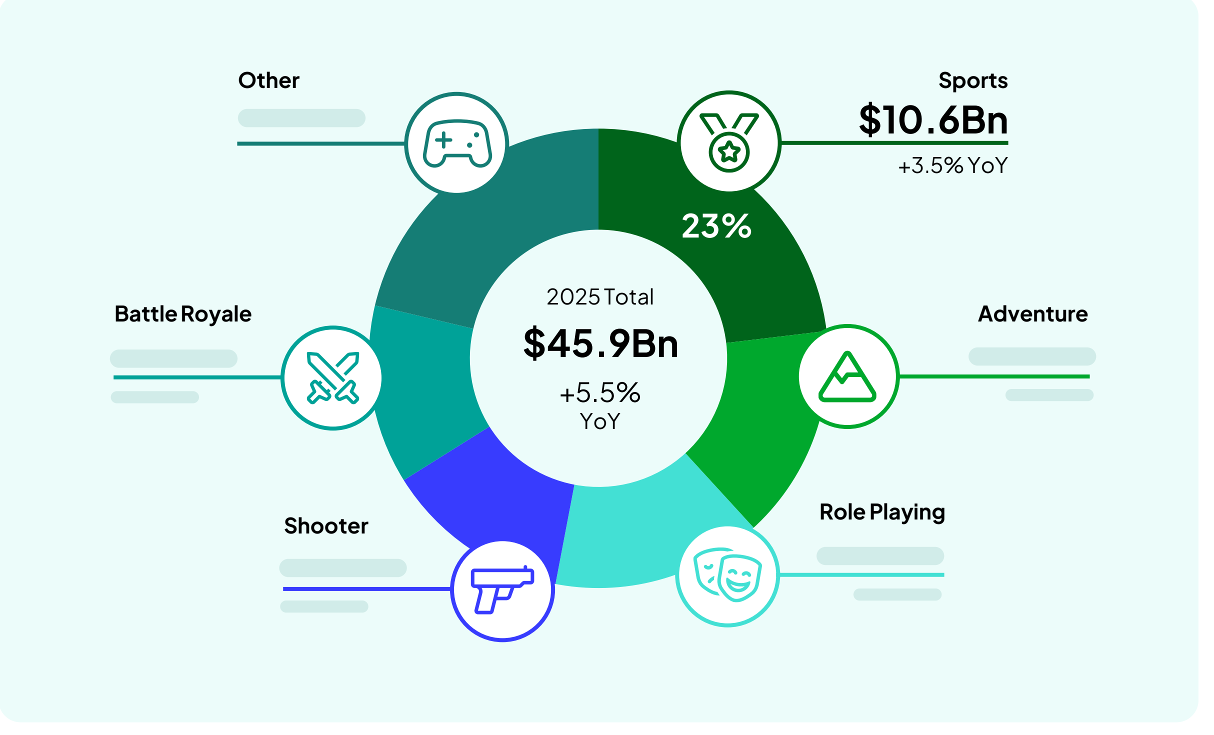
Get more title-level engagement and revenue data for 10,000+ games with Newzoo's Game Performance Monitor.
Find out more

Console genre revenues

Console revenues are projected to grow by 5.5% year over year between 2024 and 2025, reaching $45.9 billion. Moreover, the console platform is the most concentrated.

Global console revenues by genre

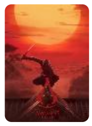
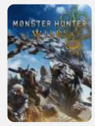
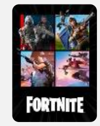
2025F



Get even more up-to-date revenue and growth figures per genre with Newzoo's Games Market Reports and Forecasts subscription.
Find out more

Top 5 console titles per genre by revenue

PlayStation & Xbox | 6 markets | January – June 2025

	Sports	Adventure	Role Playing	Shooter	Battle Royale
1	EA Sports FC 25 	Assassin's Creed Shadows 	Monster Hunter Wilds 	Call of Duty: Modern Warfare II/III/ Warzone/Black Ops 6 	Fortnite 

Full Access

Source: Newzoo Game Performance Monitor – Revenue Add-on

Get more title-level engagement and revenue data for 10,000+ games with Newzoo's Game Performance Monitor.
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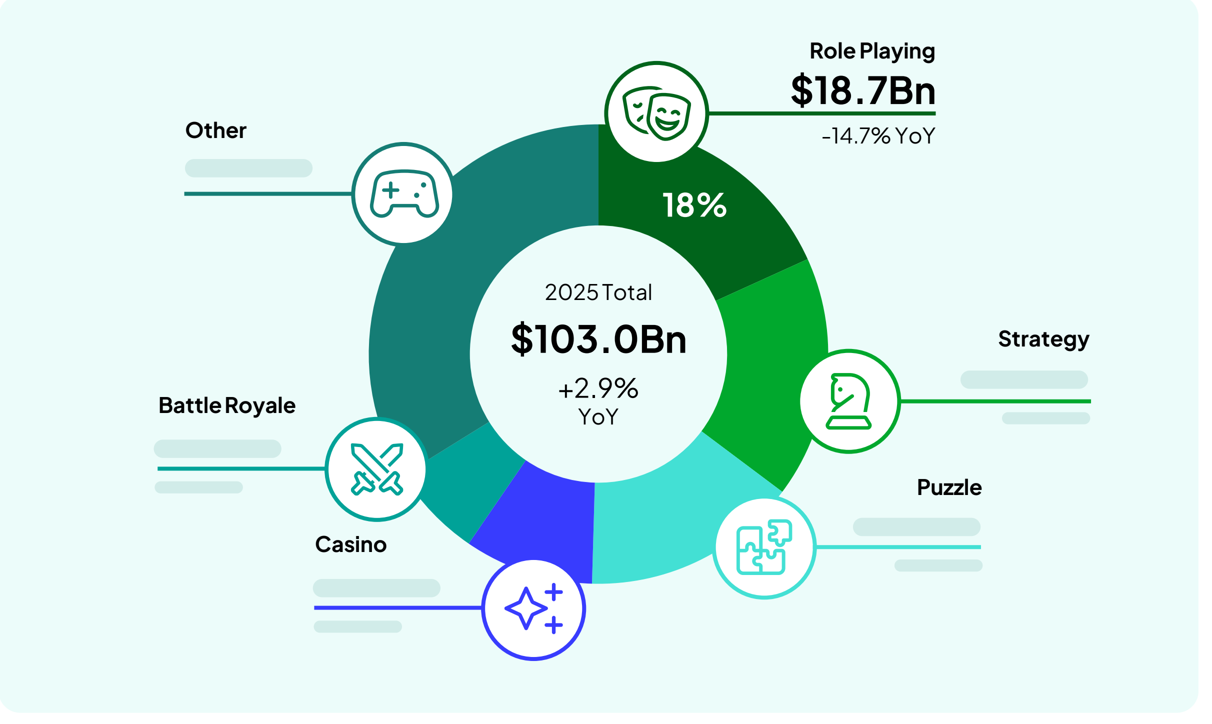
Mobile genre revenues

Mobile gaming revenues are projected to reach $103.0 billion in 2025, reflecting a year-over-year growth rate of 2.9%. Compared to the PC and console platforms, mobile exhibits a lower revenue concentration among the top five genres, with the remaining genres collectively accounting for one-third of total revenues. Newzoo does not include advertising revenues.

Global mobile revenues by genre

2025F



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Find out more

Top mobile titles per genre by revenue

App Store & Google Play | 72 markets | January – June 2025

	Role Playing	Strategy	Puzzle	Casino	Battle Royale
1	Pokémon GO	Whiteout Survival	Royal Match	Coin Master	PUBG

Full Access

Source: AppTweak

02

Special focus topics

Deep dives into the industry's most important debates

Every year, our market analysts and consultants choose **several topics to explore in considerable detail**. These **special focus topics** revolve around bigger questions in gaming and strategic challenges facing the entire industry, providing studios with in-depth, actionable analysis based on a deep understanding of the market coupled with Newzoo data.

In the full report, we cover the following subjects:

- ✓ **Play it again**: Revisiting the past for modern success — why remakes and remasters are thriving as cost-effective, cross-generational strategies.
- ✓ **Modernizing release windows**: Data-driven launch insights — release timing, early access best practices, and how attrition unfolds after launch.
- ✓ **The $80 dilemma**: A new price ceiling or too soon? — how rising prices affect engagement, and where premium titles succeed or fail.
- ✓ **The long game**: How post-launch content fuels engagement — how standalone titles are evolving with live-service-like strategies.
- ✓ **Unboxing Roblox**: User trends, genre insights, and strategic fit — how Roblox's creator-driven ecosystem opens new opportunities for traditional game developers.

In this free edition, you'll be able to read excerpts from **three of these topics**, released one per month starting in September. You can already read Special Focus Topic no.2: Modernizing release windows. The full set of special focus topics—along with all supporting data and analysis—is available exclusively to Games Market Reports & Forecasts subscribers.

Play it again: Revisiting the past for modern success

Special focus topics

Introduction

The video game industry is undergoing a strategic shift, driven by economic pressures and evolving player expectations. Simultaneously, industry standards are becoming more uniform, and backwards compatibility is now central to platform strategy. While graphical fidelity was once a major focus, **players now prioritize gameplay, narrative, and innovation** over visuals.

This has opened the door to a new generation **of remakes and remasters** (RRs) as IP lifespan is extended by sharing them across console generations and to newer audiences. Publishers are increasingly relying on outsourced development and asset reuse—especially for established IP—to cut costs and reduce risk.

This special focus topic examines **the data behind these shifts**, focusing on **cross-generational RRs**. While we'll briefly cover success factors and requirements, the main goal is to **understand performance trends and audience behavior**—and what they reveal about the future of game development and IP.

The complete special focus topic covers:

- ✓ Understanding remakes & remasters, their **value proposition**, and their **audience**.
- ✓ **Performance analysis** of recent remakes & remasters and key success factors.
- ✓ **Case studies of four remakes and remasters** and insights into how classic titles are reinterpreted for modern audiences.
- ✓ The **strategic implications** for studios considering executing a remake or remaster

Modernizing release windows: Data-driven launch insights

Special focus topics

Introduction

10-15 years ago, the adage of "Just make a good game" generally held true. However, as game engines and other development tools became more accessible; we have seen an exponential increase in new game releases.

This shift has sparked broader discussions around discoverability. While it's difficult to quantify the marketing efforts behind every game, we can reduce the guesswork by focusing on a few data-driven factors that shape a successful release strategy.

Key takeaways

- ✓ Antiquated thinking around the holiday release timing has led to cannibalization of sales **as H1 releases (Feb-May) performed, on average, 34% better** than those released in the more crowded H2 (Aug-Nov).
- ✓ **Early Access release titles that launch within six months** of their Early Access release tend to **perform significantly better** in new player acquisition and reactivating existing players.
- ✓ Games that are **released exclusively** on either PC or PlayStation can expect to see **more than 85% of their player base come from that platform**, while simultaneous releases see a much more even split across platforms.
- ✓ **Most player attrition occurs within the first four weeks** and flattens by week 12. Longer main stories reduce player attrition, and games with more management and simulation elements retain more players over the long term.

Scope & definitions

- ✓ **Scope is limited to single-player titles** released between **January 2021 and December 2024**.
- ✓ **Launch timing analysis only includes initial releases**; ports released later on other platforms are excluded.
- ✓ **Xbox titles available on Game Pass within their first three months** are excluded from the analysis.
- ✓ **Price-based tiering (MSRP as proxy for game scale)**
    - Used to frame pricing context—not as a perfect indicator, but as a practical heuristic:
        - $30 and under → Indie
        - $31–$50 → AA
        - $51 and above → AAA

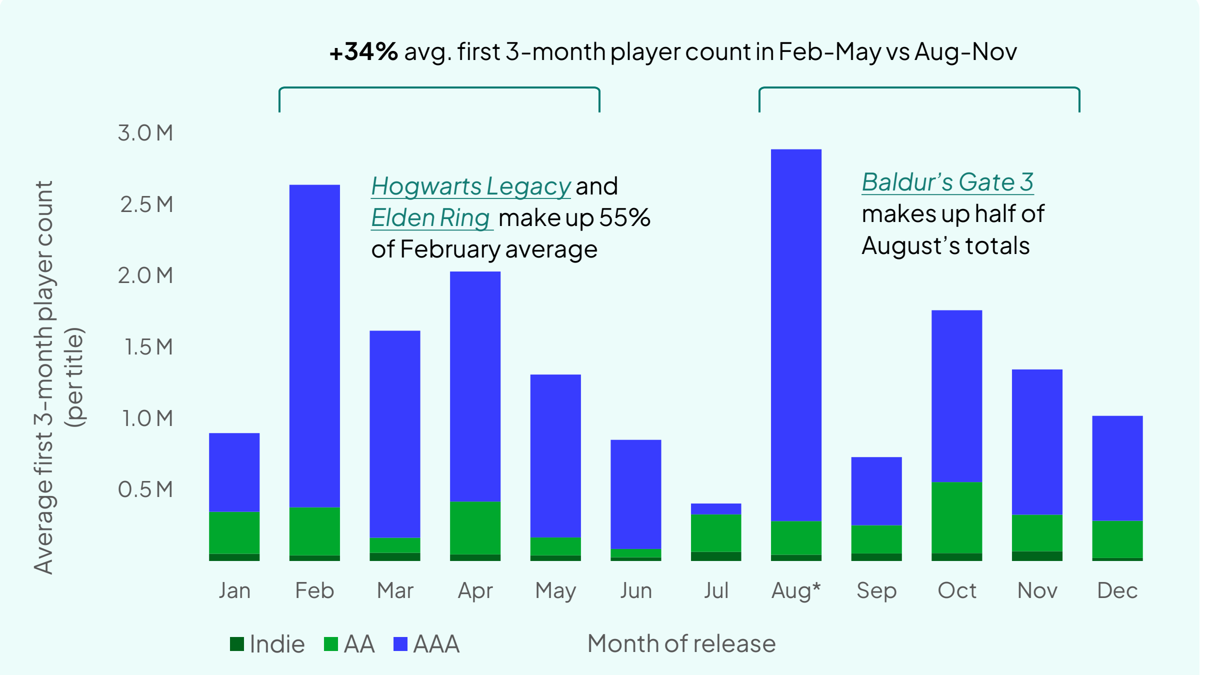
What is the impact of release timing throughout the year?

To answer this question, we looked at the **average player count for the first 3 months from launch** for thousands of **single-player games**; from indie to AAA titles. We chose this 3-month period to measure the immediate impact of releases by **reducing the role that discounting has** in increasing players. For this analysis, we focused our attention on **AAA games**, where certain trends immediately stood out.

AAA titles drive the bulk of monthly player counts, typically clustering around **September–November** and **February–March**. But a closer look reveals that this strategy may be doing more harm than good.

Average first 3-month player count per single-player title by release month

PC, PlayStation, Xbox | 37 markets | 2021-2024



AAA titles released	10	19	11	7	7	8	7	12	19	21	18	9

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Note: Due to lack of Chinese engagement data, *Black Myth: Wukong* would likely cause August's engagement numbers to significantly increase.

Early year releases(Feb–May) perform 34% better than those released late in the year (Aug–Nov), on average:

✓ **August** shows a major spike in player counts

- Driven primarily by *Baldur's Gate 3*, which **accounts for over half of August's AAA total**
- Removing it brings **August's average in line with Octobers average**

✓ **February** is similarly inflated

- *Elden Ring* and *Hogwarts Legacy* make up **55%** of total February engagement
- Without them, February resembles May, a mid-tier month in terms of performance

Key months are more crowded than they appear

- ✓ **August** releases (excluding *Baldur's Gate 3*) **all launched after August 20**
- ✓ **November** titles **all launched before November 17**

This means **nearly half of all single-player titles launched during this three-month window** each year from 2021-2024, resulting in avoidable cannibalization of players as publishers compete over the same time and wallet share.

Aug-Nov releases performed 34% worse, on average, compared to February-May. Even when excluding smash hits like *Elden Ring* and *Hogwarts Legacy* from our analysis, late-year titles still underperform by **25%.**

Multiplayer games face even greater risk

Though this analysis focused on single-player titles, preliminary data suggests **the trend holds for multiplayer games as well**—a troubling sign for titles that heavily rely on early momentum to build communities.

The industry's long-standing fixation on the holiday window is not just outdated, it's counterproductive. For both single-player and multiplayer games, **releasing in less crowded months, especially Q2, can significantly improve visibility and long-term performance**.

PC

PC

Average first 3-month player count per title by release month

PC | 37 markets | 2021-2024

Full Access

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Get the full release timing analysis including platform breakdowns (PC, PlayStation, and Xbox) with Newzoo's Games Market Reports and Forecasts subscription. Find out more

How long should a game remain in Early Access before full release (v1.0)?

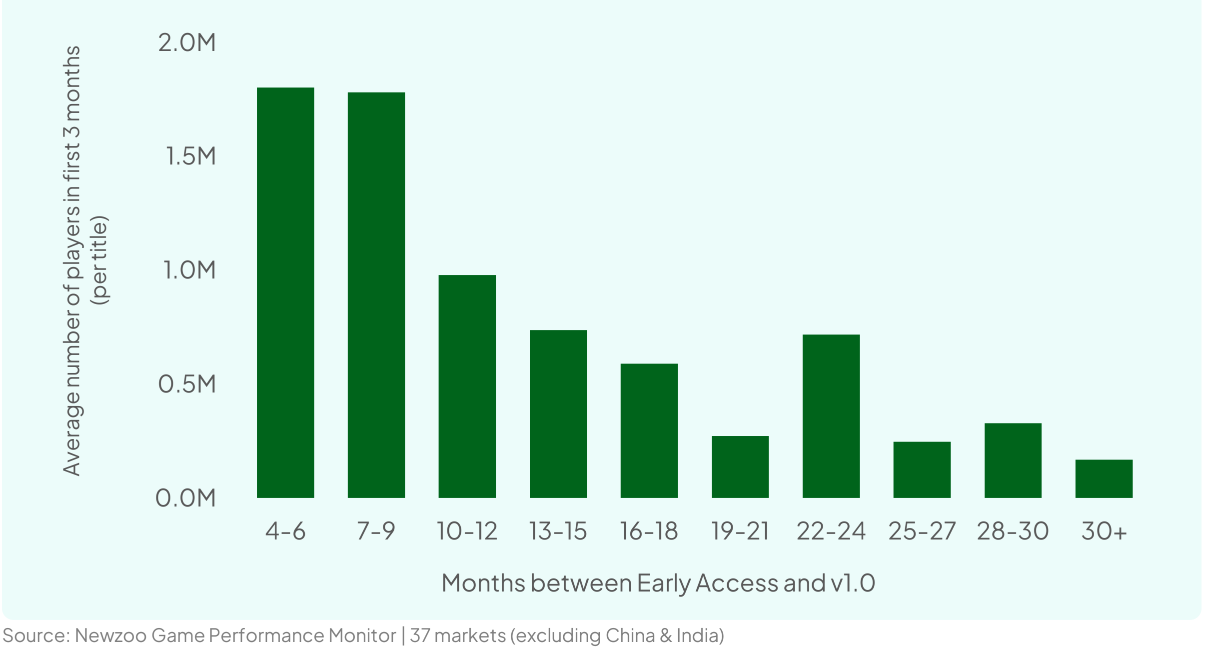
Early Access has become a widely used release model, particularly for indie studios looking to offset development costs, gather feedback, and build early awareness. While traditionally associated with smaller teams, several AA and AAA titles, like *Baldur's Gate 3* and *Sons of the Forest*, have also used Early Access to great effect.

Scope

This analysis focuses on titles that launched in Early Access between January 2021 and December 2024 and completed a v1.0 release within that period. (Note: *Baldur's Gate 3* falls outside this window and is not included in the dataset.)

Average 3-month new player count per title after v1.0 launch by Early Access length

PC, PlayStation, Xbox | 37 markets | 2021-2024



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Six-month Early Access windows perform best

- ✓ Best length of Early Access for new players at full release is between 4-9 months
  - Performance peaks at ~6 months in Early Access
- ✓ These games likely benefited from:
  - A polished foundation at Early Access launch
  - Iterative tuning via player feedback
- ✓ Early Access is effectively used as a pre-launch marketing runway for visibility
- ✓ New MAU in 22-24 months driven solely by:
  - *V Rising*
  - *Ready or Not*

Average first 3-month new player count comparison: v1.0 launch vs. Early Access, by Early Access length

PC, PlayStation, Xbox | 37 markets | 2021-2024

Full Access

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Full launches often fail to surpass Early Access momentum

- ✓ Most titles saw **minimal or negative player growth** at v1.0 compared to their Early Access debut
- ✓ Only games with ~6-months or less Early Access cycles showed consistent v1.0 growth

Outliers can skew perception (*Dave the Diver*)

- ✓ Spent **8 months** in Early Access
- ✓ Gained **50K players** during Early Access but exploded to **1.5M players** post-launch
- ✓ When removed from the dataset, other 8-month titles show **marginal gains at best**

How does platform exclusivity influence player share compared to cross-platform launches?

While platform exclusivity is becoming less common, its effect on player acquisition and engagement remain important. However, the available data comes with caveats and requires a segmented approach.

We looked at the release performance by number of players **across the first 3 months from launch** for games released **simultaneously** across different platforms to gauge each platform's contribution and compared the numbers to games where the port to the secondary platform was **staggered**.

Xbox titles excluded due to day-and-date strategy

- ✓ Xbox games nearly always launch **simultaneously with PC**
- ✓ As a result, there is **insufficient data** to evaluate Xbox to PC releases

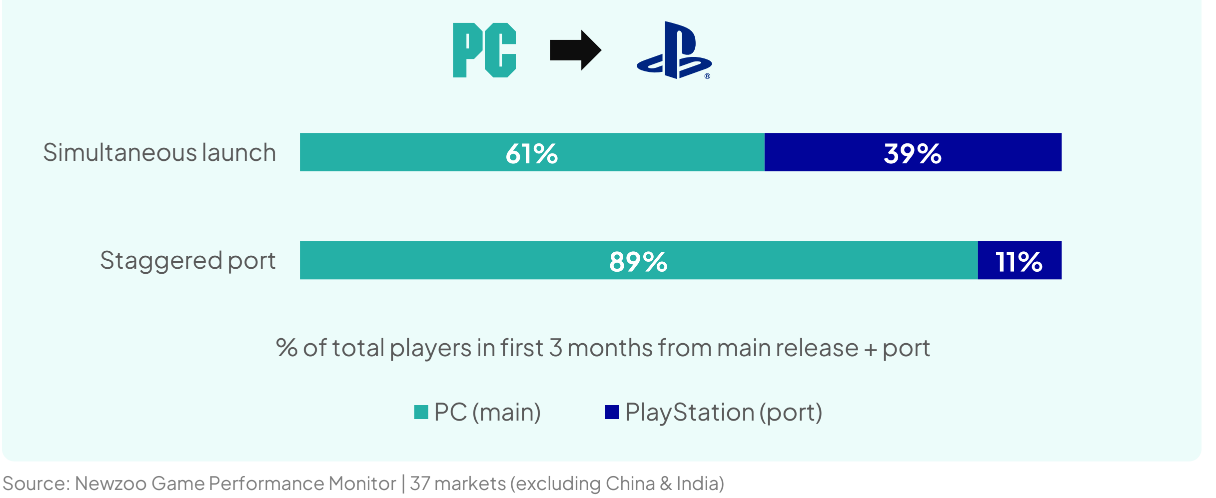
Directional trends in staggered release strategy

PC to PlayStation

- ✓ Primarily **indie and AA games**
- ✓ Often delayed due to **resource constraints**
- ✓ When indie and AA titles **launch simultaneously on PC and Playstation**, PC attracted 61% of players in the first 3 months, compared to PlayStation's 39%.
- ✓ When indie and AA titles **launch first on PC, and later PlayStation, they see significantly lower engagement on console** (just 11% of total players recorded for the first 3 months across initial platform and port)
  - 14 of 22 titles achieved less than 10% of their initial 3-month players
  - Three titles got higher than 50% of their first 3-month players
    - *Nine Sols* (52%)
    - *Dave the Diver* (52%) – Launched on PlayStation Plus Extra/Premium
    - *Teardown* (69%) – Launched on PlayStation Plus Extra/Premium

AA and indie games – comparing PC to PlayStation port vs simultaneous release

Platforms contribution towards total number of players recorded in first 3 months from both releases



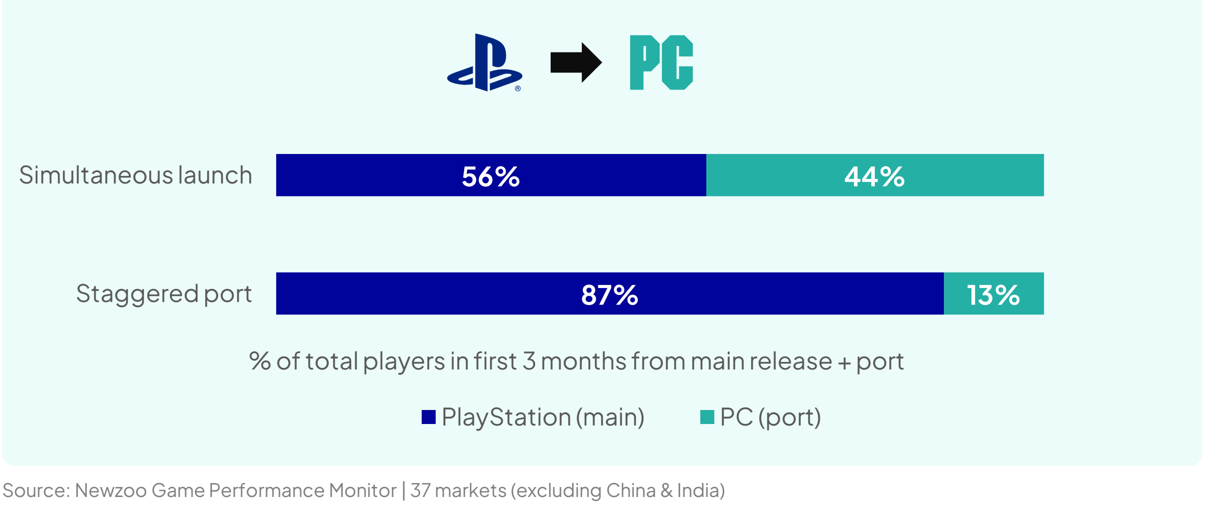
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

PlayStation to PC

- ✓ Almost always **AAA titles**
- ✓ Staggered for strategic revenue capture
  - PlayStation exclusives ported to PC also underperform relative to their original platform, but less dramatically
  - On average, **PC ports only contributed 13% of the total players** across the first 3 months of both releases.
  - **No major difference** between first party (12%) and third-party (13%) PlayStation titles
    - **Exception:** ***The Last of Us Part I Remaster***
      - Outperformed its PlayStation release on PC
      - Likely due to:
        - Latent demand from PC-only audiences
        - Release timing tied to the HBO series premiere
        - First PC launch for the franchise
        - Launched with **"Mostly Negative"** Steam reviews due to performance issues

AAA games – comparing PlayStation to PC port vs simultaneous release

Platforms contribution towards total number of players recorded in first 3 months from both releases



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

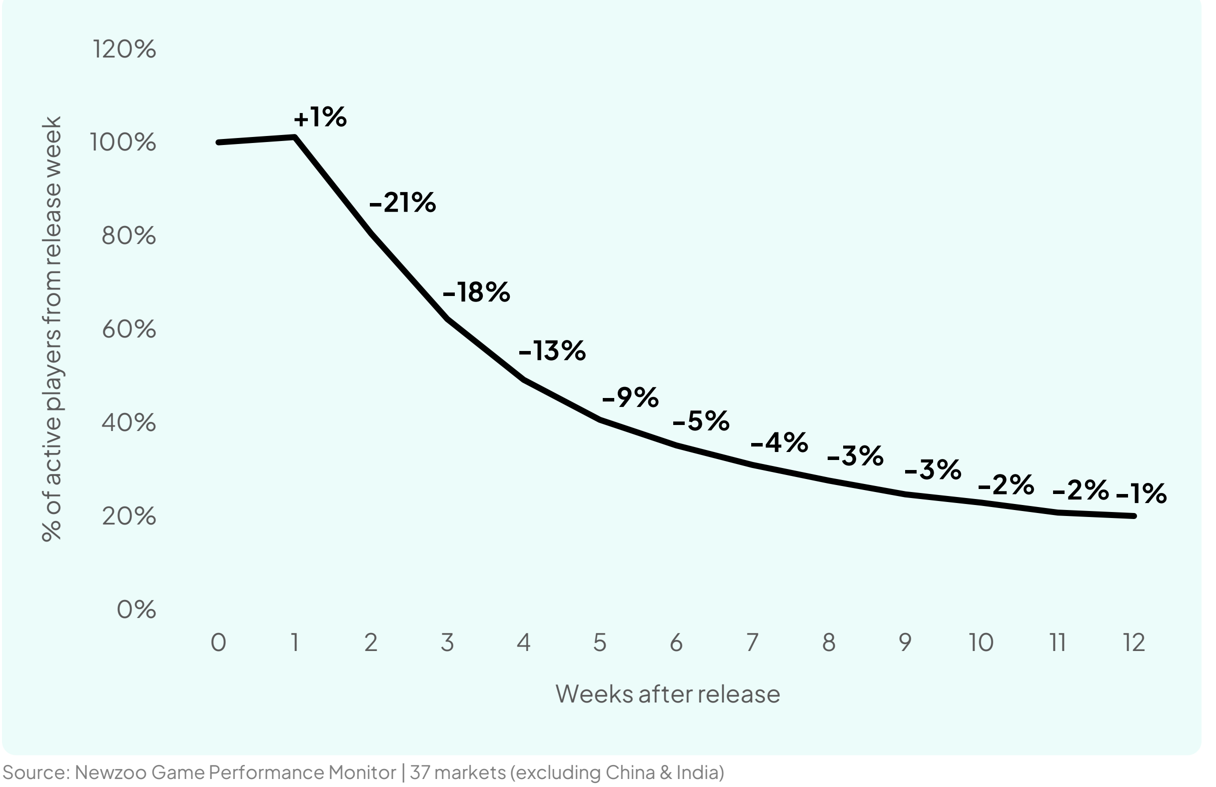
Once a game is released, what is the attrition rate of players to plan future discounts and content?

Player attrition is inevitable but understanding when players leave is essential for post-launch planning, whether that be sales opportunities or new content planning, if this is desired.

First, we will start with a baseline to understand what a title's average attrition would be for single-player titles of the games in our panel.

Weekly active users by number of weeks available | Single-player titles

PC, PlayStation, Xbox | 37 markets | 2021-2024



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

The baseline retention curve for single-player games

- ✓ **Week 1 → Week 2**: Engagement remains **relatively stable**
- ✓ **Week 2 → Week 5**: Engagement drops sharply (almost 60%) before leveling off
- ✓ **Week 6 → Week 12**: Most titles reach a stable baseline
- ✓ **After Week 12**: Decline by roughly -1% per week

Engagement during this period is most influenced by the **amount of content** available at launch.

Get the full attrition rate analysis including breakdowns per game length, genre, and scale(indie vs AA vs AAA) with Newzoo's Games Market Reports and Forecasts subscription. Find out more

Summary of key insights and strategic implications

Theme	Key insight	Strategic implication
Release window optimization	H2 launches (Aug-Nov) cannibalize one another; H1, especially Q2, out-performs crowded H2 by ~34%, on average.	Consider moving titles out of Q3/Q4 into Q2 or other quiet months to maximize visibility and engagement. Too few data points in July to know if it should be universally avoided.
Early access duration	Titles leaving Early Access within 4–9 months (sweet-spot ≈ 6 months) gain the highest new-player lift at v1.0; longer Early Access cycles see diminished re-activation.	Treat Early Access as a pre-launch marketing campaign, not an open-ended dev phase. Longer durations can work if they are planned with clear timelines of when players can expect v1.0.
Launch platform strategy		
Content length fit		
Player attrition curve		

Full Access

The $80 dilemma: A new price ceiling or too soon?

Special focus topics

Introduction

As development costs and investor expectations rise, so do calls to raise game prices. Five years after the first $70 titles launched in 2020, some games are testing the $80 mark, sparking pushback from budget-strapped players. Still, $80 won't become the standard overnight.

With each price hike, players are likely to scrutinize value more closely, and publishers must carefully assess whether their games can justify higher pricing. This article explores how pricing affects single-player engagement and what the data reveals about pricing thresholds, player behavior, and platform dynamics.

The complete special focus topic covers:

- ✓ How **pricing tiers** ($50, $60, $70) **shape player engagement**, breakout potential, and sales performance.
- ✓ Which **genres are gaining the most traction** across different price points and which ones are losing ground.
- ✓ A **framework for benchmarking singleplayer games** against their peers to optimize price and engagement
- ✓ Meeting player expectations of **game length** based on the cost of a game.

The long game: How post-launch content fuels engagement

Special focus topics

Introduction

In an industry increasingly driven by long-tail engagement and recurring revenue, the line between single-player and live-service games' content has started to blur. We've discussed the importance of back catalogues in the context of historical IP, but our focus now shifts to the support of active titles and getting the most out of back catalogue content.

Premium spend alone no longer defines a title's lifecycle. Instead, post-launch content, strategic discounting, and ongoing community engagement are critical to extending the commercial viability of older titles.

This edition focuses on how single-player games across PC, Xbox, and PlayStation achieve long-tail success through these evolving support strategies. This trend complements, but does not directly address, our Discounting Strategy special focus topic in the 2024 Global Games Market Report.

Future updates may further explore multiplayer live-service models, hybrid economies, and emerging monetization frameworks, as these continue to evolve and present new opportunities for analysis.

Key takeaways

- ✓ Post-launch content now represents a critical lever for sustaining engagement and extending revenue windows. DLC revenue share stabilizes between 20-25% after year 1.
- ✓ Genre correlates strongly with content type performance. Build post-launch roadmaps with monetization type aligned to genre strengths. Build update cycles with retention loops, not just acquisition and awareness campaigns.
- ✓ Post-launch addition to subscriptions boosted DLC revenues. Subscriptions can be used as content upsell engines rather than end goals—track DLC attach rates per platform.

Scope & definitions

This section is powered by the Newzoo Game Performance Monitor & its Revenue Add-On, with data spanning from April 2020 on consoles, and December 2020 on PC, to May 2025. Engagement data covers 37 global markets, with revenues data spanning the United States, United Kingdom, Germany, France, Spain, and Italy.

Data has been filtered using the Newzoo Game Performance Monitor Taxonomy to Monetization: Pay-to-Play and Player Mode: Single-player. The Sports genre has been excluded, as well as the Call of Duty franchise.

Premium revenues: All consumer spend on a title for the selected period earned through full-game purchases, **including bundles with DLC.**

Recurring revenues: All consumer spend on a title for the selected time period that is not earned through full-game purchases, including but not limited to **DLC, subscriptions, and microtransactions.**

Post-launch content can take many forms, each serving a different purpose depending on audience expectations, gameplay structure, and monetization goals. Before jumping into case studies, we'll first outline a taxonomy of common post-launch content types in single-player games:

Narrative DLC:
Story-rich expansions that extend the main campaign or explore side arcs.

Gameplay Expansions:
Modding tools, new weapons, bosses, systems, multiplayer, or difficulty modes that enhance replayability.

Cosmetic Packs:
Optional skins, outfits, or visual upgrades

Seasonal/Collaborative Content:
Time-limited events or IP crossovers designed to spark re-engagement.

Free Quality-of-Life Updates:
System overhauls, accessibility features, performance upgrades,
and community-requested tweaks. Can include post-launch cross-platform releases

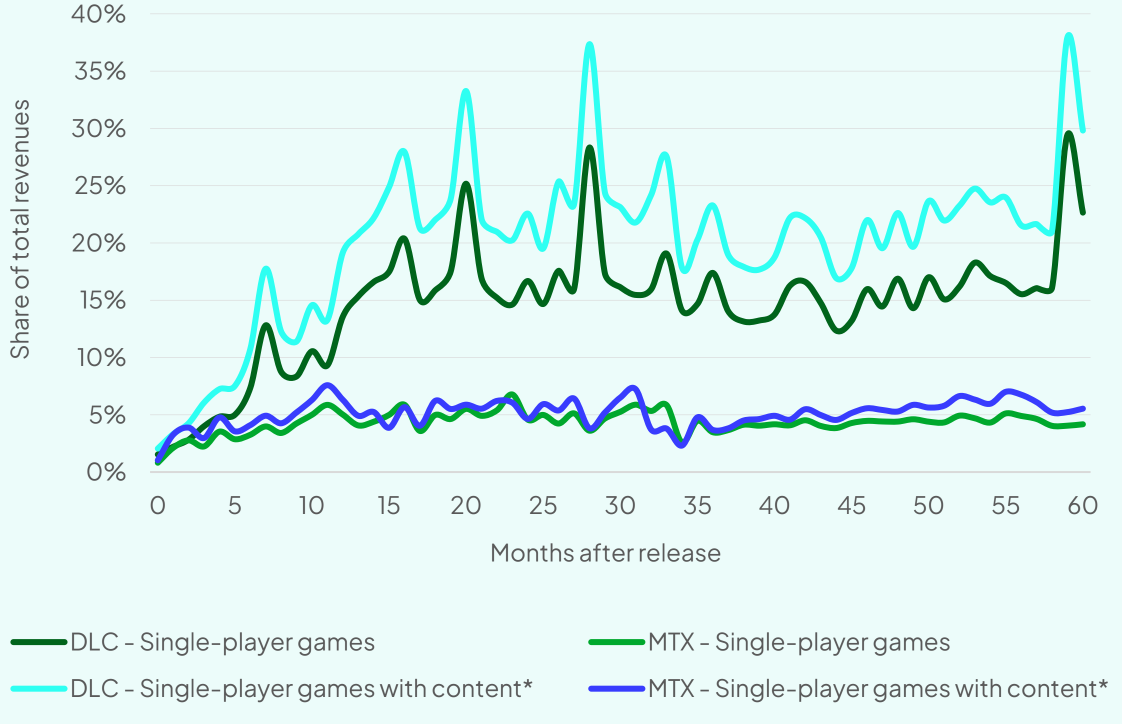
Post-launch content landscape

To understand the current state of post-launch content, we'll be examining revenue shares by monetization type & genres.

By monetization

Share of recurring revenues over time by monetization

PC, PlayStation, Xbox, Switch | 6 markets | April 2020-May 2025



*Excludes titles with only premium revenues

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Average share of revenues by monetization

PC, PlayStation, Xbox, Switch | 6 markets | April 2020-May 2025

	Premium + Bundles	DLC	Microtransaction
Year 1	90%	7%	3%
Year 1 (excl. Premium only)	87%	9%	4%
Years 2-5	79%	17%	4%
Years 2-5 (excl. Premium only)	72%	23%	5%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

- ✓ **DLC revenue share spikes at six and 12 months after release, then shows stable growth**
- ✓ **When excluding premium-only titles, DLC revenues:**
  - Stabilize between 20-25% share after year 1.
  - See a 37% jump in the Years 2-5 average
  - Are likely underestimated as bundles are included in premium spend.
- ✓ **Microtransactions, largely cosmetics, do not follow the same curve as DLC even when premium-only titles are removed**

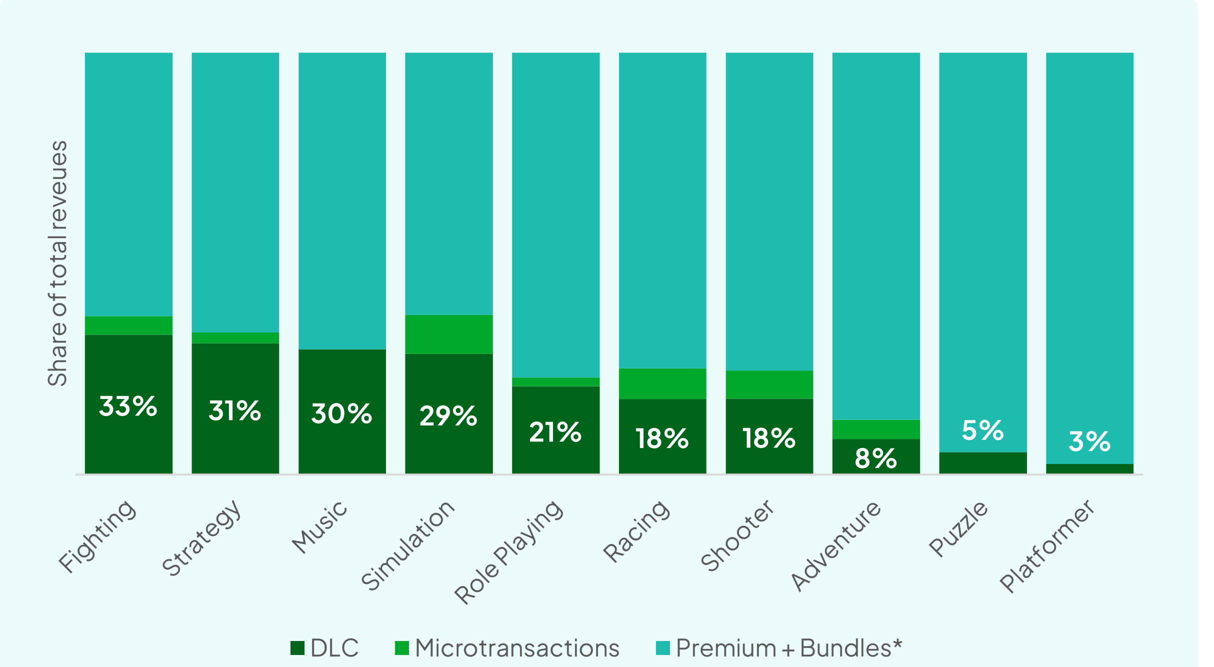
Well-timed content can effectively defy gravity and re-ignite interest and spending months—or even years—after launch, from returning and new players alike.

By genre

When we look at genres, we can see a great deal of overlap between the proportion of spending on DLC & microtransactions and thus how generally suitable a genre is for specific types of content.

Revenues by monetization – Months 12-60

PC, PlayStation, Xbox, Switch | 6 markets | April 2020-May 2025



Source: Newzoo Game Performance Monitor | | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

While Role Playing titles rely on **Narrative DLC,** other genres' recurring revenues can be tied to their product-market fit. They tend to rely on a blend of **Gameplay Expansions, Seasonal/Collab Content, Cosmetics, and Quality of Life updates.**

Amongst the genres with the highest % of DLC revenues, there are two categories *(examples on page 97):*

- ✓ **Category dominators** are where **one title or franchise** holds the majority of long-tail engagement and revenues **within a specific niche**.
- ✓ **Category neighbors** are games found in genres where settings, themes, and licensing vary across a number of successful titles with similar gameplay or systems.

While beyond the scope of this trend, **category neighbors** also applies to certain subgenres such as **Action Roguelike,** where branching paths create near-endless replayability and strategic depth. We'll explore one such example shortly, in our case study of *Dead Cells*.

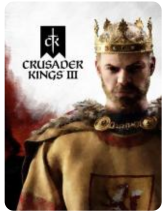
Key takeaways

- ✓ **When excluding premium-only titles, DLC revenue share stabilizes between 20-25% after year 1**
- ✓ **Games & franchises in the strategy & simulation genres tend to occupy a specific niche, whereas music, fighting, and racing games differ more on settings, themes, and licensing.**

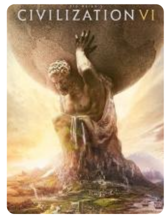
Dominators

Strategy

31% DLC

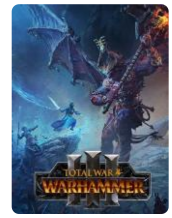


Crusader Kings III



Civilization VI

Hearts of Iron IV

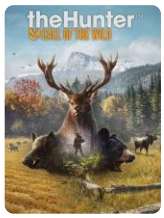


Total War Warhammer III

Dominators

Simulation

29% DLC



theHunter: Call of the Wild

Planet Zoo

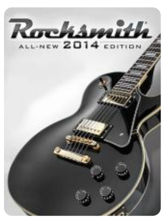
American Truck Simulator

Cities Skylines

Neighbors

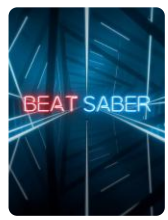
Music

30% DLC

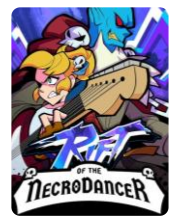


Rocksmith 2014 Edition

Just Dance 2025 Edition



Beat Saber



Rift of the NecroDancer

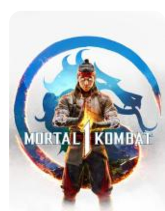
Neighbors

Fighting

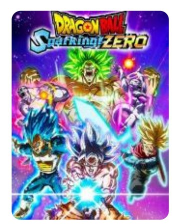
33% DLC

Street Fighter 6

Tekken 8



Mortal Kombat 1



Dragon Ball Sparking! ZERO

Neighbors

Racing

18% DLC

Forza Horizon 5

Gran Turismo 7

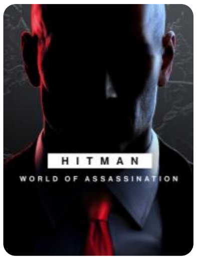
The Crew Motorfest

Assetto Corsa

Case studies

When examining post-launch content, a combination of new and returning players is critical to establish a stable baseline of engagement and revenues. The following case studies unpack how these dynamics play out across a range of titles and strategies.

HITMAN: World of Assassination



IO Interactive's *HITMAN: World of Assassination* (WoA) exemplifies a successful pivot from a challenging episodic launch to a robust, enduring live-service model. Despite initial commercial setbacks that led to its separation from Square Enix, IO Interactive refined and expanded the Hitman trilogy, finally combining it into the WoA experience.

By pioneering single-player live service, *HITMAN: WoA* sustains long-term engagement and predictable revenue without the pressure of constant new player inflows.

Key strategies

Narrative DLC

- ✓ Sarajevo Six Campaign (Aug 2023)

Gameplay Expansions

- ✓ Ambrose Island map (Jul 2022)
- ✓ Freelancer roguelike mode (Jan 2023)
- ✓ Elusive Target Arcade (2022)
- ✓ Stone & Knight co-op (2025)

Cosmetic Packs

- ✓ Undying, Drop, Splitter, and Banker packs (2024-2025)

Seasonal / Collaborative Content

- ✓ Van Damme 'Splitter' event (2024)
- ✓ Conor McGregor 'Disruptor' event (2024

Free Quality of Life Updates

- ✓ World of Assassination rebrand (Jan 2023)
- ✓ Continuous patches, accessibility, and VR upgrades

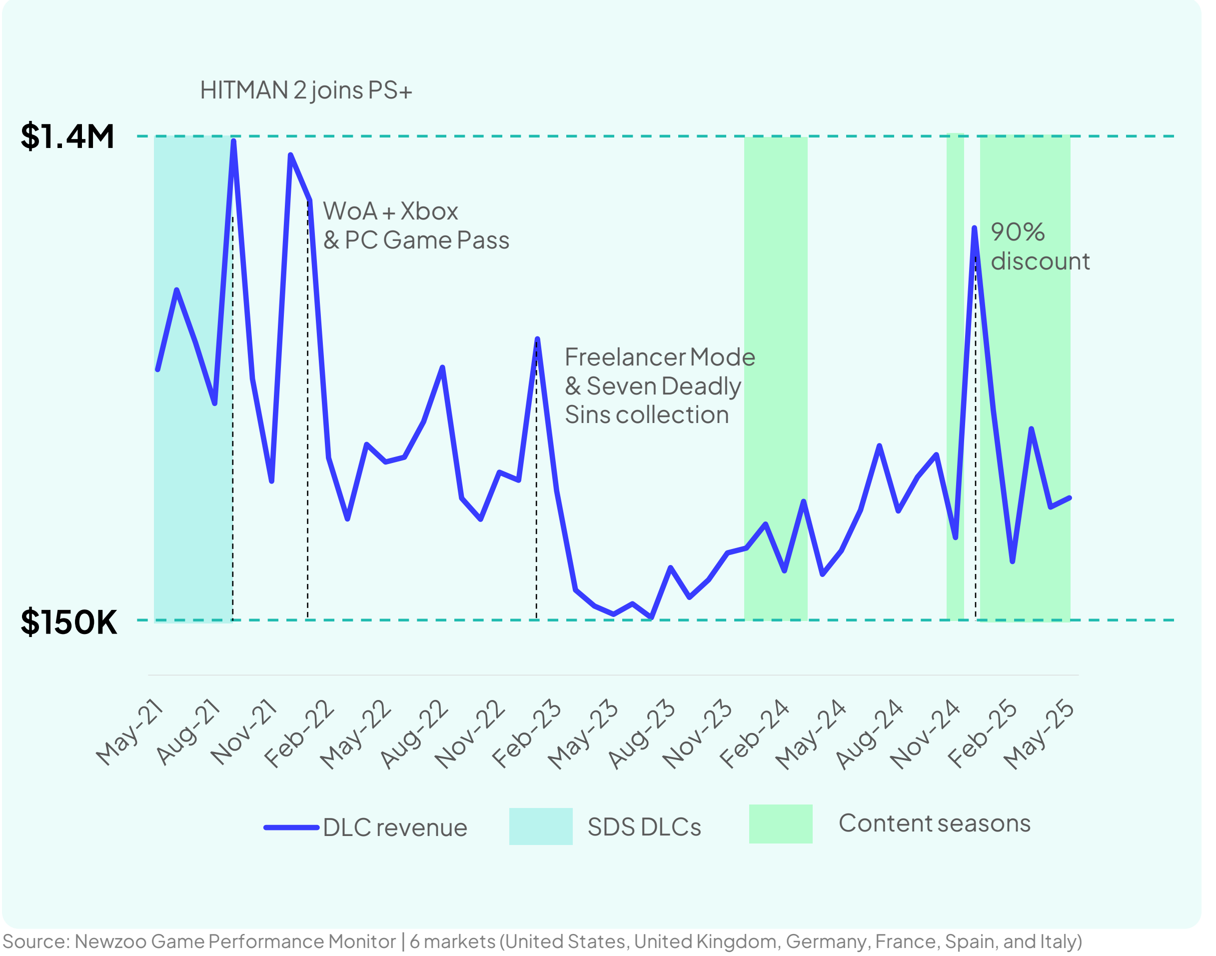
Platform Expansions / Free Releases

- ✓ *HITMAN 2* on PlayStation Plus (Jan 2022)
- ✓ *Hitman Trilogy* on Game Pass & Steam (2022)
- ✓ *Quest 3 VR: Reloaded* (Sep 2024)

Impact on monetization

HITMAN: WoA monthly recurring revenues

PC, PlayStation, Xbox | 6 markets | May 2021-May2025



Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

**This span begins shortly after the trilogy was combined into HITMAN WoA*

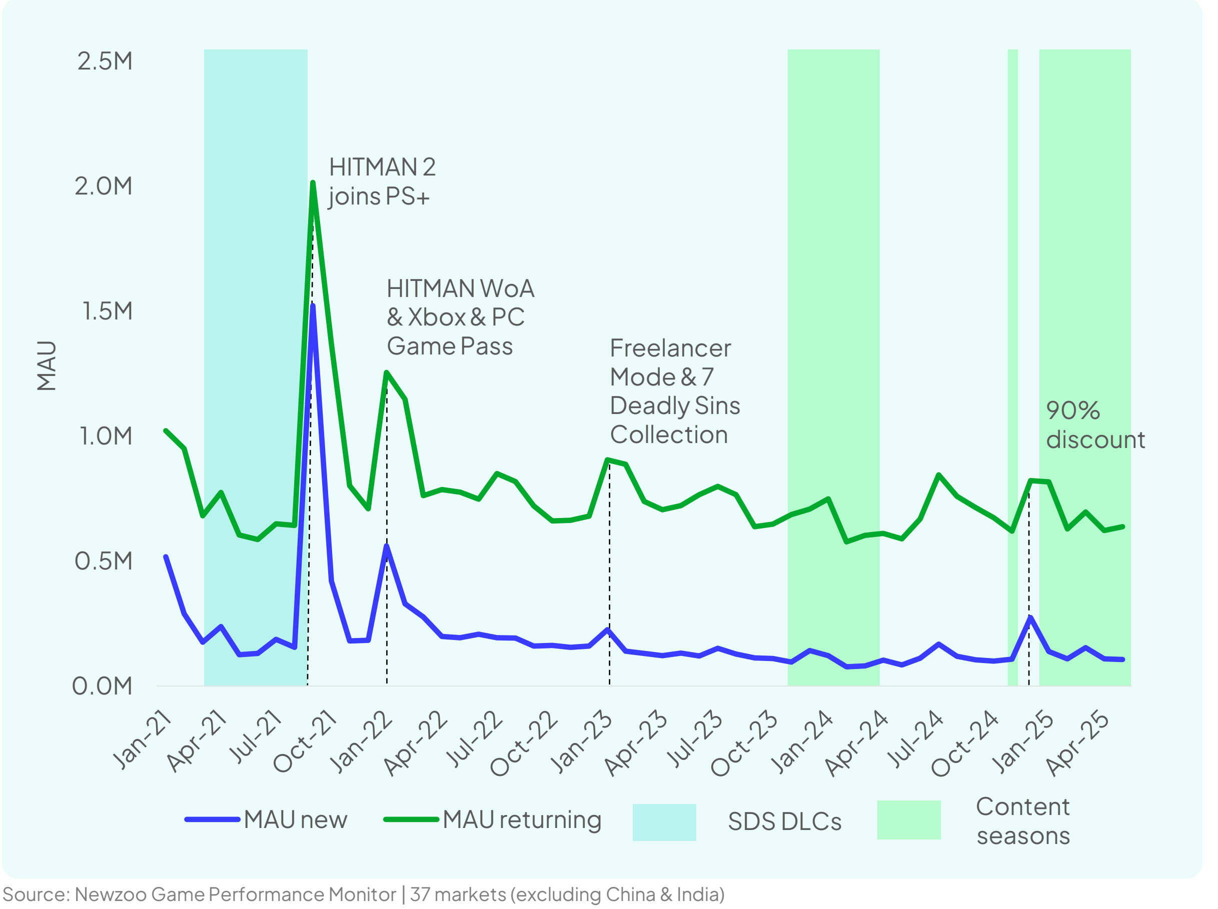
Key takeaways

- ✓ **DLC for *HITMAN WoA* represents a strategy to defy decline and ensure stable revenues as the trilogy matures**
  - DLC has generated between $150K-$1.4M per month over the last four years.
  - DLC accounts for 21% of tracked revenue, increasing its share during overall revenue downturns.
- ✓ **Additions to subscriptions did result in DLC revenue growth, but nowhere near the scale of the spikes in engagement**
  - The September 2021 addition of *HITMAN 2* to PlayStation Plus spiked DLC revenues by 97%; the trilogy & Game Pass launch in January 2022 helped mitigate the decline from the 168% spike in DLC revenues in December 2021.
- ✓ **Spenders have an average Lifetime Value of $28.7,** which is notable given the subscription additions and heavy discounting strategy (up to 90% in 2024)

Impact on engagement

HITMAN: WoA monthly engagement

PC, PlayStation, Xbox | 37 markets | January 2021-May 2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Key takeaways

✓ **Engagement has remained incredibly stable for a single-player title**

- Monthly Active Users (MAU) have remained above 650K since January 2021, primarily driven by returning users who accounted for 79% of the engagement.

✓ **Larger content releases can drive sustained engagement after a discounting event**

- In January 2023, adding roguelike mechanics via Freelancer Mode and the Seven Deadly Sins Collection drove a 33% uplift in engagement. 80% of that month's players were returning, even with the cohort of new players being inflated due to discounting.

✓ **Time-limited 'Elusive Targets' and seasonal content are important for awareness, but don't spike short-term engagement**

- Acting as important marketing beats, they reinforce long-term awareness between major content drops and help to sustain engagement amongst dedicated players.

Dead Cells

Dead Cells is a fast-paced Action Roguelike platformer known for its procedurally generated levels and high replayability. As a standout indie success, the game has maintained long-term relevance through a deliberate post-launch strategy centered on major DLC expansions and steady content updates. Large-scale narrative DLCs —introducing new biomes, enemies, and mechanics — consistently drive spikes in engagement and revenue. At the same time, more minor updates and crossovers with other indie IPs sustained player interest.

While their player base growth can partially be attributed to the 2020–2021 pandemic, *Dead Cells* has proven capable of turning new players into long-term users, with cohorts like those from *Fatal Falls* showing strong retention through multiple DLC cycles.

Key strategies

Narrative DLC

- ✓ Rise of the Giant – March 2019 - free
- ✓ The Bad Seed – February 2020
- ✓ Fatal Falls – January 2021
- ✓ The Queen and the Sea – January 2022
- ✓ Return to Castlevania – March 2023

Gameplay Expansions

- ✓ Who's the Boss? – September 2019
- ✓ Derelict Distillery – May 2021
- ✓ Malaise Rework – August 2021
- ✓ Break the Bank – March 2022
- ✓ Clean Cut – April 2023

Seasonal/Collab Content

- ✓ Everyone is Here – November 2021 *
- ✓ Everyone is Here Vol. 2 – November 2022*
- ✓ Terraria Crossover – November 2023*, **
- ✓ Holiday Skins & Minor Seasonal Updates – Various (recurring, dates vary)

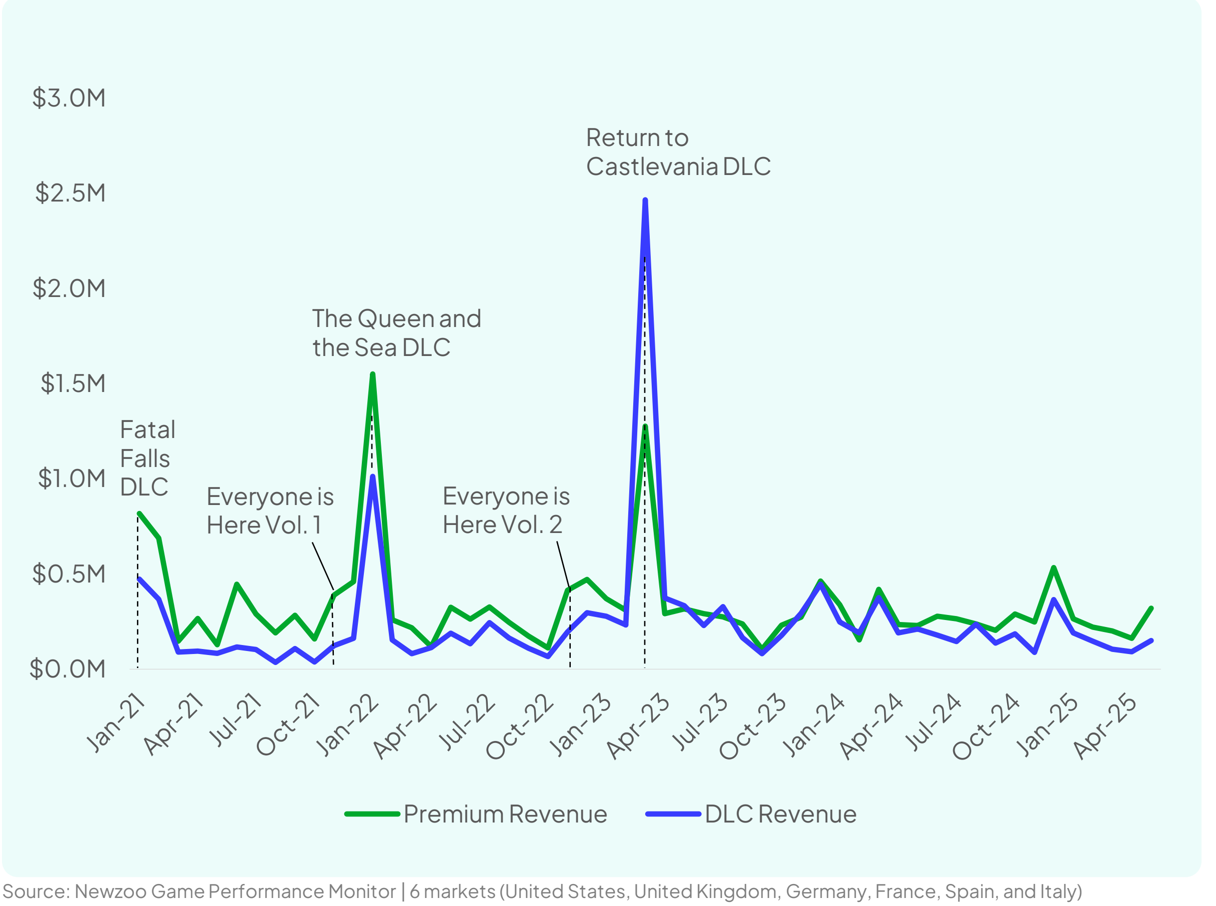
* Also a gameplay expansion

** (*Dead Cells*' content also launched in Terraria)

Impact on monetization

Dead Cells monthly revenues

PC, PlayStation, Xbox, Switch | 6 markets | January 2021-May 2025



Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Key takeaways

✓ **Revenues show deep monetization of a captive player base**

- Major paid DLCs were the primary inflection points for both premium and recurring revenue.
  - *The Queen and the Sea* (312% MoM revenue growth) and *Return to Castlevania* (590% MoM revenue growth). *Return to Castlevania* drove premium revenue growth of 312%.
  - DLC revenues peaked at **66% share** thanks to *Return to Castlevania*, with a long-term average of **42%**.

✓ **Free collab content spiked spending outside of paid DLC windows**

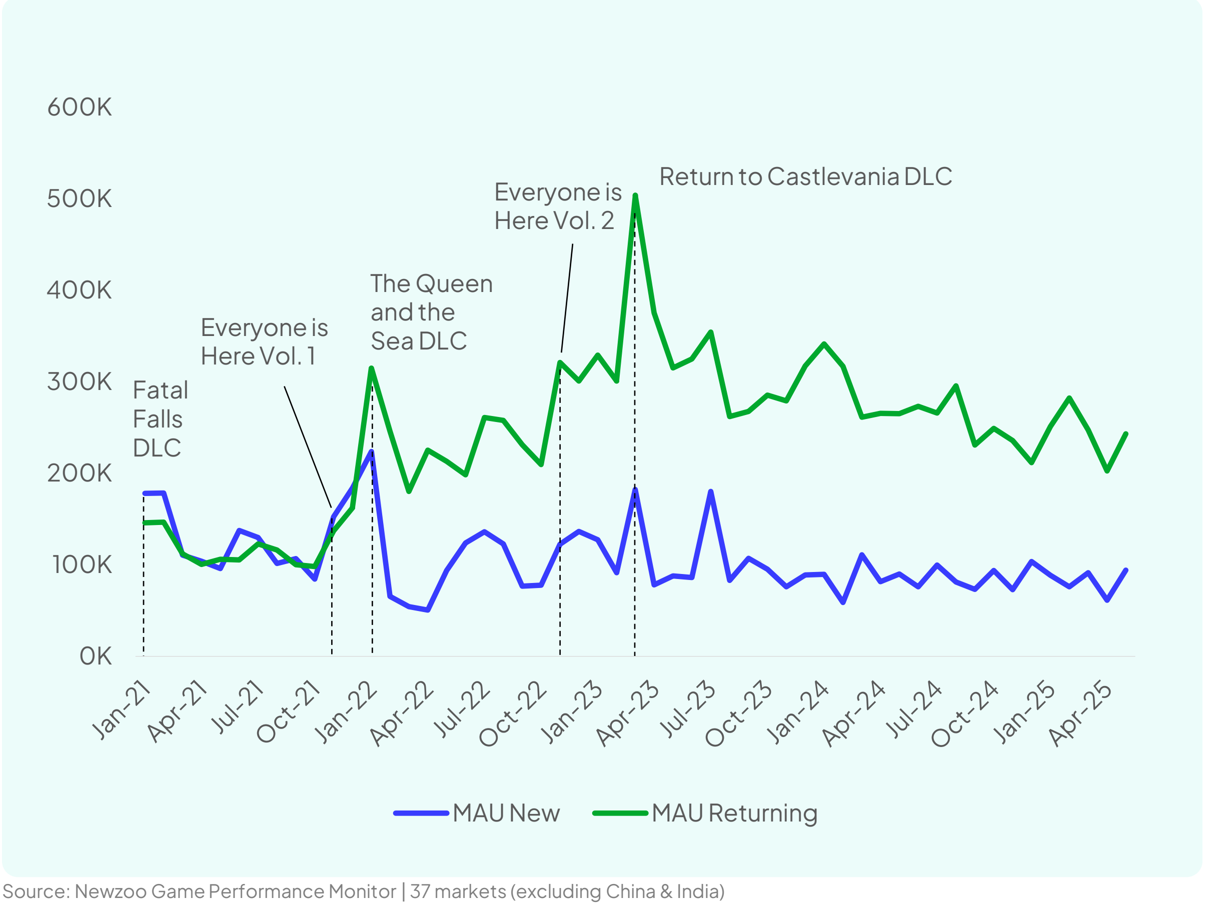
- Everyone Is Here Volumes 1 & 2 saw spending boosted 162% and 243%, respectively.

✓ **Minor updates, while valuable for continuity, did not translate into meaningful revenue**

Impact on engagement

Dead Cells monthly engagement

PC, PlayStation, Xbox | 37 markets | January 2021-May 2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Key takeaways

✓ **MAU lift and user acquisition from narrative DLCs is substantial**

- MAU uplift in months of narrative DLC releases saw an average uplift of 62%, driven by both new (55%) and returning (66%) users.
- Long-term engagement is sustained primarily by players acquired during Fatal Falls (2021), with retention continuing well beyond 2022.

✓ **Collaborative content drove three of the five largest user acquisition spikes.**

- Return to Castlevania boosted MAU new by 100%
- The free collaborations of Everyone Is Here Volumes 1 & 2 saw MAU uplifts of 59% and 54%, and MAU new boosted by 81% and 58% respectively
- The other two spikes came via the Fatal Falls DLC & a 50% Steam discount

✓ **Major updates and quality of life changes had varying impacts on MAU**

- They averaged a -4% MoM decline, although the average is skewed by updates frequently following DLC releases

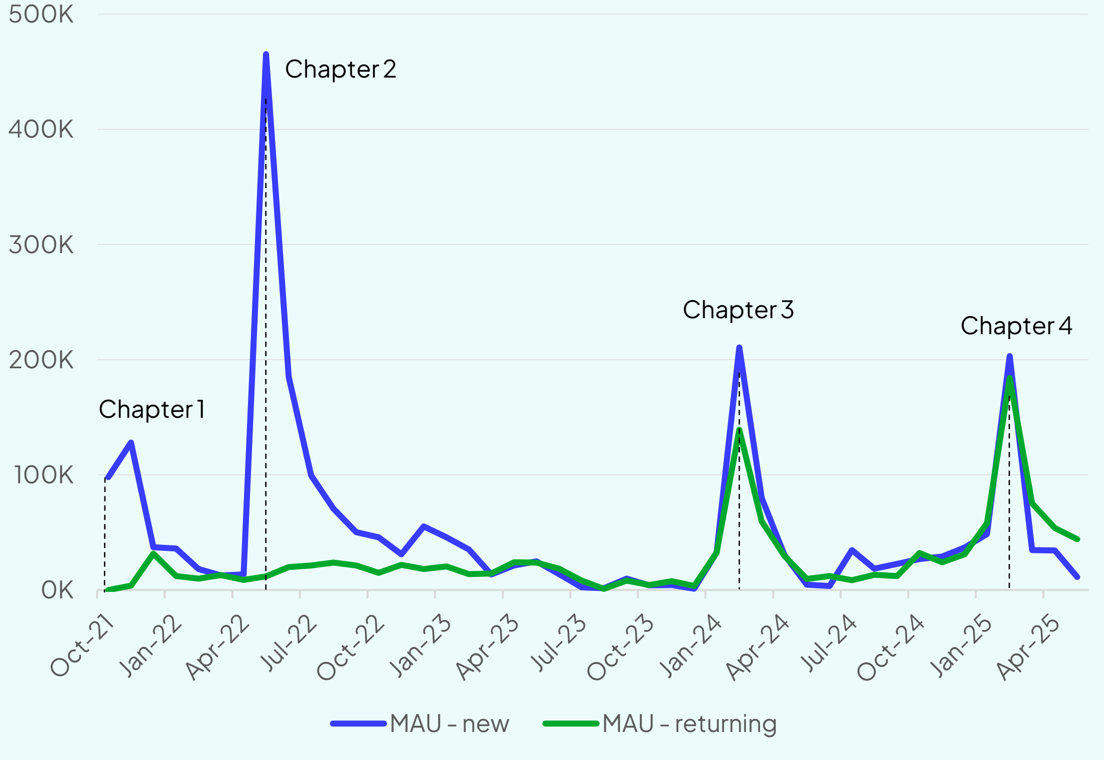
Poppy Playtime

Key strategies

[*Poppy Playtime*]() is an **episodic gateway horror** game set in an abandoned toy factory. While narrative DLC is the key engagement driver, the reason we are mentioning it here is not exclusively its game engagement. Following in the footsteps of the Five Nights at Freddie's franchise, it has succeeded in releasing meaningful episodic content at incrementally higher price points, capitalizing on both new and returning fans of the series.

Poppy Playtime monthly engagement

PC, PlayStation, Xbox | 37 markets | October 2021-May 2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Key takeaways

- ✓ ***Poppy Playtime* is the driving element of a concerted transmedia strategy with a focus on indirect revenues.**

In contrast to over two million lifetime players estimate, a recent interview revealed that *Poppy Playtime* content on YouTube has accrued **over 100 billion views.** The brand is being leveraged through:

- ✓ A highly effective **merchandise program**, capitalizing on strong fan demand for collectibles and character products, particularly plushies.
- ✓ A *Poppy Playtime* **film adaptation** being a critical component of their **IP monetization roadmap**.
- ✓ Developing the franchise across diverse media, from exploring **new game formats** to branching into **books and music**.
- ✓ Strategic entry into the *Roblox* **ecosystem** with '*Poppy Playtime* Forever,' an official spin-off aiming to broaden reach amongst younger audiences and explore new monetization avenues like avatar accessories.

If the game hasn't directly recouped its development cost, its indirect revenues look to have.

Conclusion

Post-launch content is the connective tissue between launch momentum and long-term profitability in a landscape where back catalog performance increasingly defines publisher success. It's not just about keeping games alive—it's about keeping them relevant, discoverable, and monetizable.

For single-player games, it has evolved from an incremental value-add to a value-driver that significantly extends game lifecycles, drawing partially from the playbook of multiplayer content. It now represents a critical lever for sustaining engagement and extending revenue windows; deepening the time and spend investment from existing fans and newcomers alike.

Summary of key insights and strategic implications

Theme	Key insight	Strategic implication
DLC is a revenue anchor	DLC share stabilizes between 20-25% after year 1 in non-premium-only games	Treat DLC as a long-term monetization lever, not a short-term bump—plan pipelines with multi-year arcs
Genre fit predicts content success	Genre correlates strongly with content type performance	Build post-launch roadmaps with monetization type aligned to genre strengths
Returning players are core	DLC and new modes primarily drove engagement among returning users, not first-time buyers	Build update cycles with retention loops, not just acquisition campaigns—optimize UX for lapsed users
Quality updates support, don't lead	System updates maintain retention but don't meaningfully impact acquisition or revenue	Budget QoL patches as stability tools—not engagement engines—and tie them to content messaging for better uptake
Platform expansion drives DLC upsell	Game Pass/PlayStation Plus additions boosted DLC sales	Use subscriptions not as end goals, but as content upsell engines—track DLC attach rates per platform
The game isn't always the ultimate goal	Poppy Playtime generates significant indirect value via merchandise, YouTube content, and film plans	Broaden revenue beyond the game with strategic expansion into merchandise, media, and spin-off platforms

Unboxing Roblox: User trends, genre insights, and strategic fit

Special focus topics

Introduction

Today, *Roblox* is no longer just a game platform. It's a fast-growing ecosystem where Gen Z and Gen Alpha socialize, create, and play across millions of user-generated experiences. For anyone looking to reach these audiences, it's no longer an innovative opportunity; it is a foundational part of the future of gaming and entertainment.

The platform continues to scale in both audience and monetization:

- ✓ **Nearly 112 million daily active users (DAUs)** globally as of Q2 2025, with engagement continuing to rise.
- ✓ **Developer payouts are up 52% year-over-year in Q2 2025 to $316 million**, reflecting growing creator success and platform maturity.
- ✓ *Steal a Brainrot*, a *Roblox*-native game, recently hit **25.4 million concurrent users**; marking one of the highest CCU peaks ever recorded for a single game.
- ✓ To support this momentum, Roblox has made major investments into AI-powered development tools that streamline the process of building, scripting, animating, and testing. It has also improved its creator incentives, pricing optimization, regional monetization, and transparent algorithmic discovery.

This special focus topic was developed in collaboration with **Gamefam**, one of the platform's largest native studios and owner of **RoMonitor**, *Roblox*'s leading analytics tracker.

Key takeaways

- ✓ ***Roblox* is structurally closer to mobile than PC or console**, with short sessions and cosmetic monetization, but its emphasis on trends, social identity, and creator-driven content makes the platform **resemble platforms like YouTube and TikTok even more**.
- ✓ **The audience is aging up**, with teens and young adults becoming the fastest-growing segments, creating opportunities for more mature, high-quality content.
- ✓ **Genre overlap exists**, but successful *Roblox* experiences require a different design approach, centered on native game styles, expression, and player-driven trends.
- ✓ **For many newcomers to the platform, partnering with native creators** offers a more effective entry point than building from scratch.

Scope & definitions

This analysis uses data from Newzoo's Game Performance Monitor and Global Gamer Study, as well as RoMonitor and AppTweak. It explores whether and how traditional PC, console, and mobile developers can engage with the *Roblox* audience. We also include direct insights from Gamefam on what works (and what doesn't) when approaching *Roblox* as an outsider.

Note: Newzoo's Global Gamer Study covers players aged 10–65, while Roblox's public data includes users under 10. This scope difference is important when comparing datasets.

Who are Roblox players?

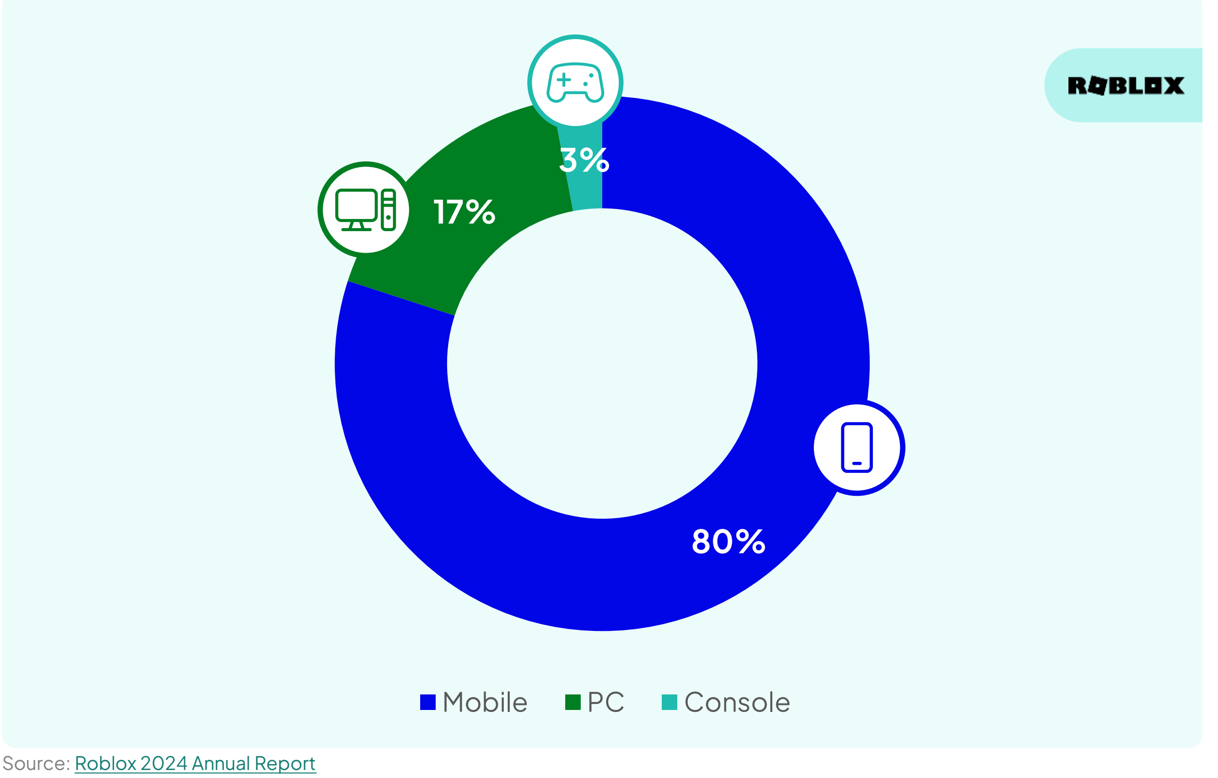
To assess whether traditional PC, console, and mobile developers can connect with the *Roblox* audience, it's important to first understand **who these players are** and **how they interact with gaming more broadly**. The data points to a mobile-first player base that is young but maturing—and not necessarily siloed within the *Roblox* ecosystem.

A mobile-first platform

Roblox is primarily accessed on mobile devices.

Roblox daily active users (DAU) by platform

All platforms | Global | As of 2024



Source: Roblox 2024 Annual Report

This is a stark contrast to the broader gaming population. According to Newzoo's Global Gamer Study 2025, general gamers (played games in the past 6 months, aged 10-65) show a more balanced platform distribution:

- ✓ 52% play primarily on mobile
- ✓ 23% prefer PC
- ✓ 24% prefer console

This makes clear that ***Roblox* over-indexes on mobile** and **significantly under-indexes on console** compared to the general gamer population.

Monetization metrics also align more closely with mobile gaming behavior:

- ✓ In Q1 2025, the conversion rate of DAUs (the share of daily unique paying users among DAUs) stood at **1.25%**, a typical figure for free-to-play mobile games.
- ✓ Daily bookings per DAU averaged **$0.14**, again mirroring common mobile free-to-play benchmarks. For comparison, the figure was $0.62 for *Fortnite* on PC and console in 2025 (as of May 2025, 6 markets: US, UK, IT, ES, DE, FR).

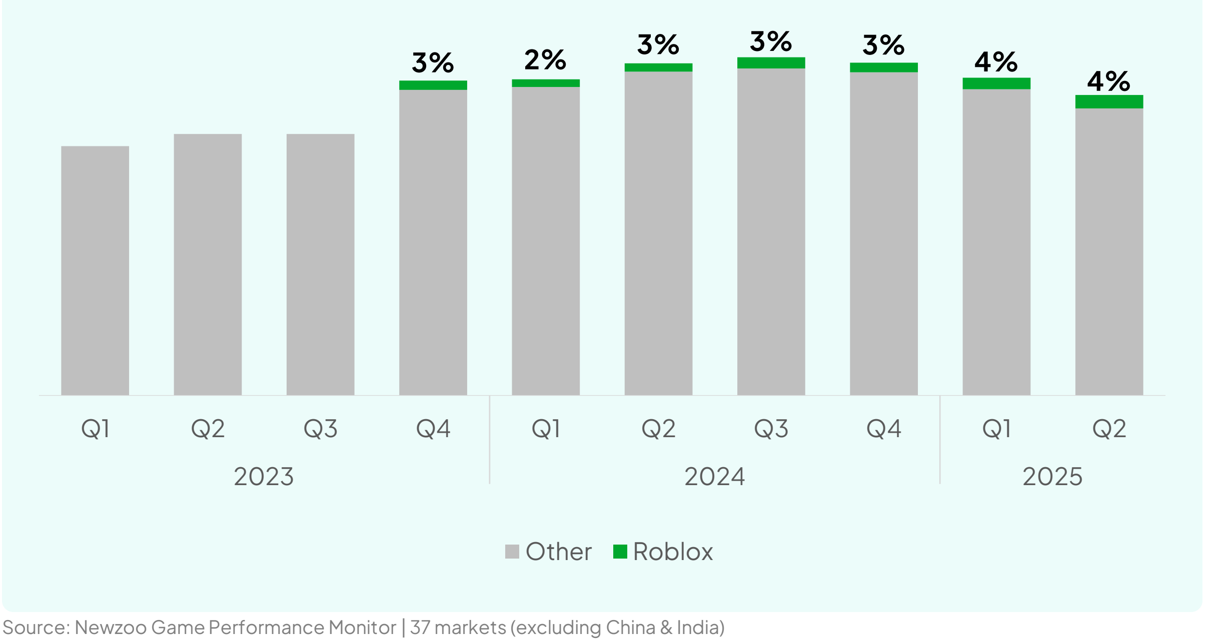
Not just mobile-only players

Despite *Roblox* being a mobile-first platform, its players aren't locked into mobile. According to Newzoo's Global Gamer Study 2025, only **24% of *Roblox* players aged 10-65 play games exclusively on mobile**. The share is likely higher when including players under 10, but this still suggests many *Roblox* players engage across platforms.

Console usage in particular is growing. Since *Roblox* launched on PlayStation in October 2023, it has steadily claimed ~3% of the platform's total playtime, reaching 374 million hours in Q2 2025 (Newzoo's PC & Console Report 2025).

Average playtime per quarter, Roblox vs. other

PlayStation | 37 markets | Q1 2023 – Q2 2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

That opens the door for traditional PC and console developers to reach this audience off-platform, especially those with **family-friendly** or **multiplayer IPs** as seen in the top 5 games with the highest player overlap% with *Roblox* on console (May 2025, among titles with 100K+ MAU overlap):

- ✓ *Rec Room*: Multiplayer Sandbox with social spaces and UGC
- ✓ *Descenders*: Physics-based biking game
- ✓ *Stumble Guys*: Casual Battle Royale Platformer focused on multiplayer
- ✓ *Human Fall Flat*: Cooperative Puzzle-Platformer
- ✓ *Gang Beasts*: Multiplayer Party game

A young audience that's growing up

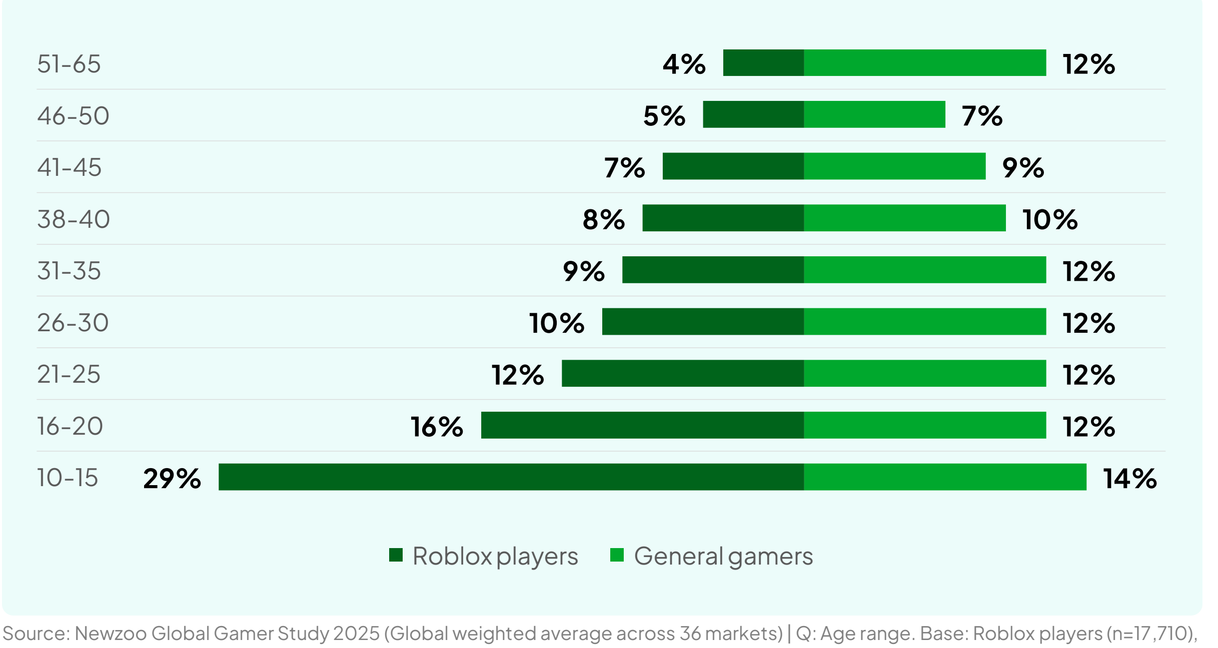
Roblox is well-known for its appeal to younger players, but the platform's audience is aging up.

Newzoo's primary research confirms that *Roblox*:

- ✓ Over-indexes on pre-teens, teens, and young adults
- ✓ Under-indexes on older age groups
- ✓ Matches the broader market in the 21-25 range

Age distribution of Roblox players vs. general gamer population

Base: People who played Roblox/games on any device (past 6 months)



Source: Newzoo Global Gamer Study 2025 (Global weighted average across 36 markets) | Q: Age range. Base: Roblox players (n=17,710), total players (n=59,634).

However, the Global Gamer Study does not capture players under 10. According to Roblox, **36% of DAUs were under age 13** in Q2 2025.

The young cohort tends to engage with a wide variety of shorter experiences.

- ✓ On average, *Roblox* users engaged with **21 different experiences every month**, spending **3.4 hours monthly per experience**.
- ✓ In comparison, PC and console players engaged with ~30 games annually in 2024.
- ✓ Session lengths also tend to be shorter on *Roblox* than on PC/console. In May, *Brookhaven* averaged 15.3 minutes per session, while The Sims 4 reached 123 minutes on PC and console.

Still, **the fastest-growing segment is the 13+ audience**:

- ✓ In Q2 2025, *Roblox* reported 54% year-over-year growth in the 13+ age group
- ✓ Compared to just 22%growth among users under 13

This shift matters. Older players are more independent in spending, demand higher-quality content, and are often more interested in content creation. All in all, *Roblox* is increasingly becoming a multigenerational creative ecosystem. And for traditional developers, that opens new opportunities.

What game genres do Roblox players like?

To understand how traditional developers can engage *Roblox* players, it's not enough to ask who they are and where they play—we also need to look at **what they play**. *Roblox*'s genre ecosystem is distinct from PC and console, but there are points of convergence, especially with mobile.

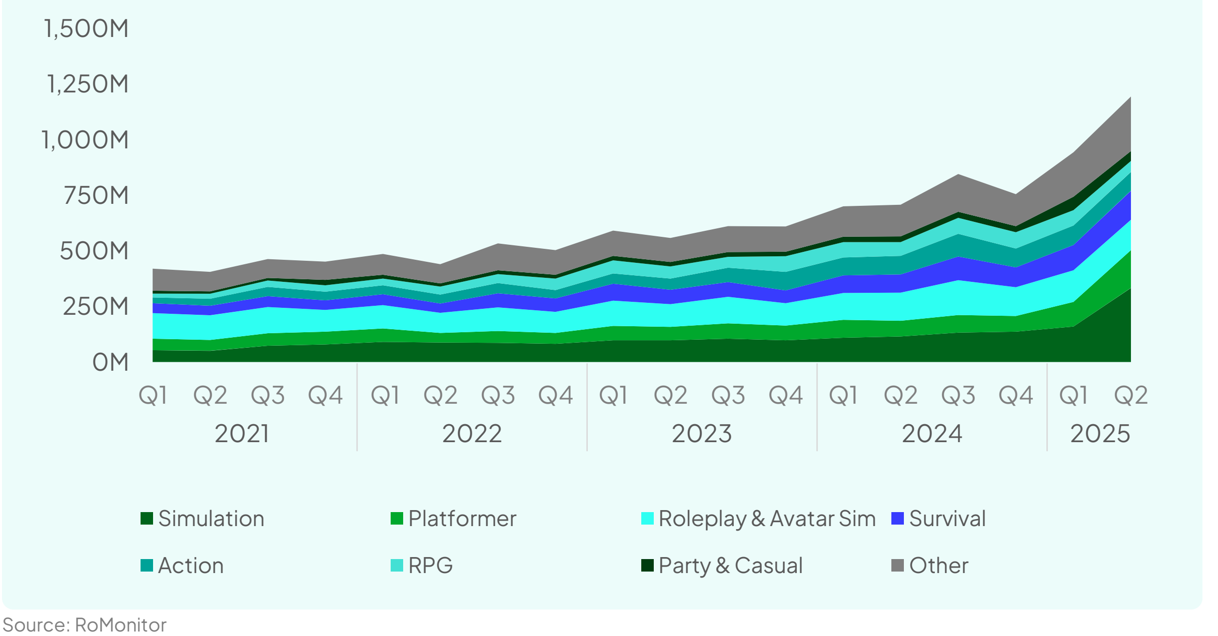
Top genres on Roblox

According to RoMonitor, the five most popular genres on *Roblox* by average daily visits (Q1 2021 – Q2 2025) are:

- ✓ **Roleplay & Avatar Sim (116 million daily visits)**
  Players act out real-life or fictional scenarios in shared social environments. These games focus on customization, emotes, and open-ended play. *Brookhaven*, *Roblox*'s most visited game of all time (73 billion all-time visits), is the flagship of this genre. Closest genre equivalents: Life Sims and Sandbox Social games like *The Sims* or *Animal Crossing*.
- ✓ **Simulation (110 million daily visits)**
  Progression-based games with repetitive loops, upgrades, and passive income. These mirror Idle Clickers or Tycoon games. Notable examples include *Grow a Garden* and *Steal a Brainrot.*
- ✓ **Platformer (70 million daily visits)**
  Obstacle-based games focused on jumping, timing, and reflexes. Closest to traditional Platformers like *Super Mario* or *Celeste*.
- ✓ **Survival (70 million daily visits)**
  Games where players must endure threats or manage scarce resources. These mirror traditional Survival titles like *Don't Starve* or *ARK*.
- ✓ **Action (59 million daily visits)**
  Fast-paced combat-focused games, often PvP-heavy and inspired by anime IPs. These resemble Action RPGs, Arena Brawlers, or Fighting games, but with a *Roblox*-specific spin: anime-inspired visuals, accessible mechanics, and mobile-friendly design.

Average daily visits per quarter by genre

Roblox | Global | Q1 2021 – Q2 2025



Source: RoMonitor

Why these genres work on Roblox

Despite their variety, *Roblox*'s most successful genres share several key traits:

✓ **Social and trend-driven:** *Roblox* is as much a social network as it is a game platform. Players often choose games because their friends are playing them, and YouTube or TikTok influencers play a significant role in driving discovery. Popular experiences often function as social hubs or trendsetters.

✓ **Creative and expressive:** Customization is core to the *Roblox* experience, whether it's avatars, homes, jobs, pets, or outfits. Many top games let players construct and perform alternate identities.

✓ **Goal-oriented but low-skill:** Top games offer clear progression and rewards, but the gameplay loops are casual, repetitive, and easy to pick up—designed for broad appeal.

✓ **Low friction and accessible:** Onboarding is minimal, and most games have no strict win/lose conditions. Players can drop in and out easily, mirroring mobile usage patterns.

Comparing Roblox to PC, console, and mobile

To identify crossover potential, we analyzed top-performing genres across platforms using:

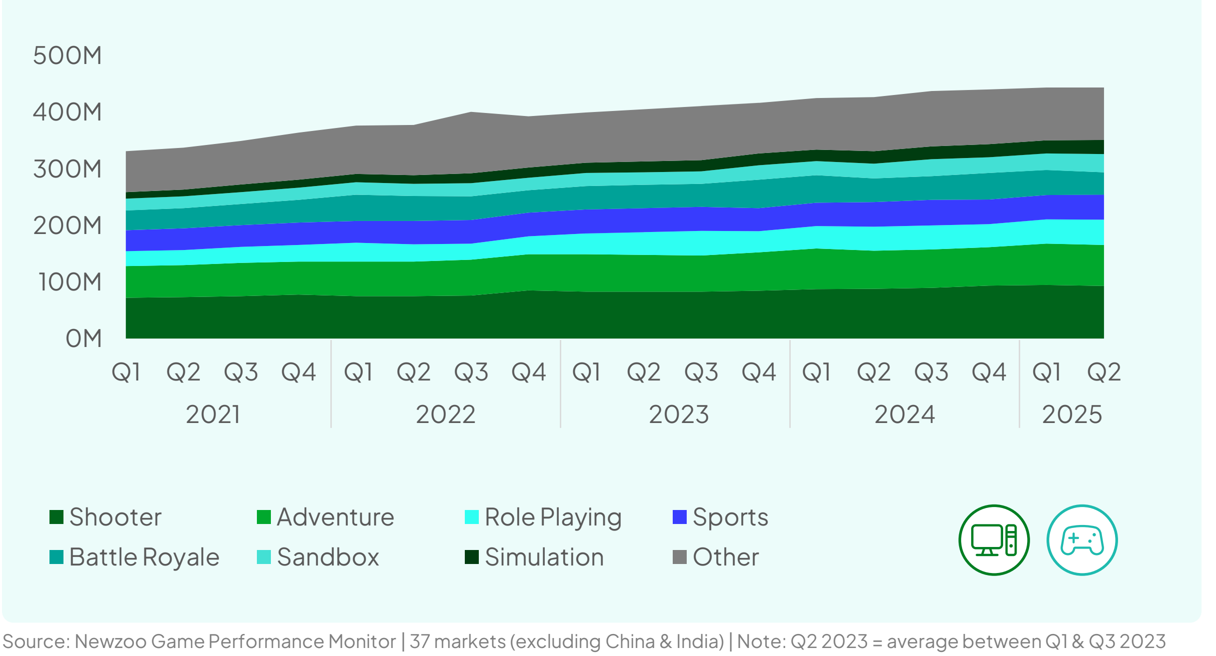
✓ Newzoo's Game Performance Monitor (PC & console, Q1 2021 – Q2 2025)

✓ AppTweak's Market Intelligence Data (mobile, Q1 2021 – Q2 2025)

Before diving into findings, it's important to note that genre definitions vary across ecosystems. *Roblox* genres are largely community-defined and often blend multiple mechanics or aesthetics, while PC/console and mobile genres follow more standardized classifications. That said, we've aligned the data and analysis as much as possible to identify meaningful patterns.

Average monthly active users per quarter by genre

PC, PlayStation, Xbox | 37 markets | Q1 2021 – Q2 2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India) | Note: Q2 2023 = average between Q1 & Q3 2023 due to data outage in June 2023

Top 3 genres by MAUs on PC & console (average per quarter, Q1 2021–Q2 2025):

- ✓ Shooter: 83 million MAUs, led by *Call of Duty*
- ✓ Adventure: 65 million MAUs, driven by *Grand Theft Auto*
- ✓ Battle Royale: 42 million MAUs, dominated by *Fortnite*

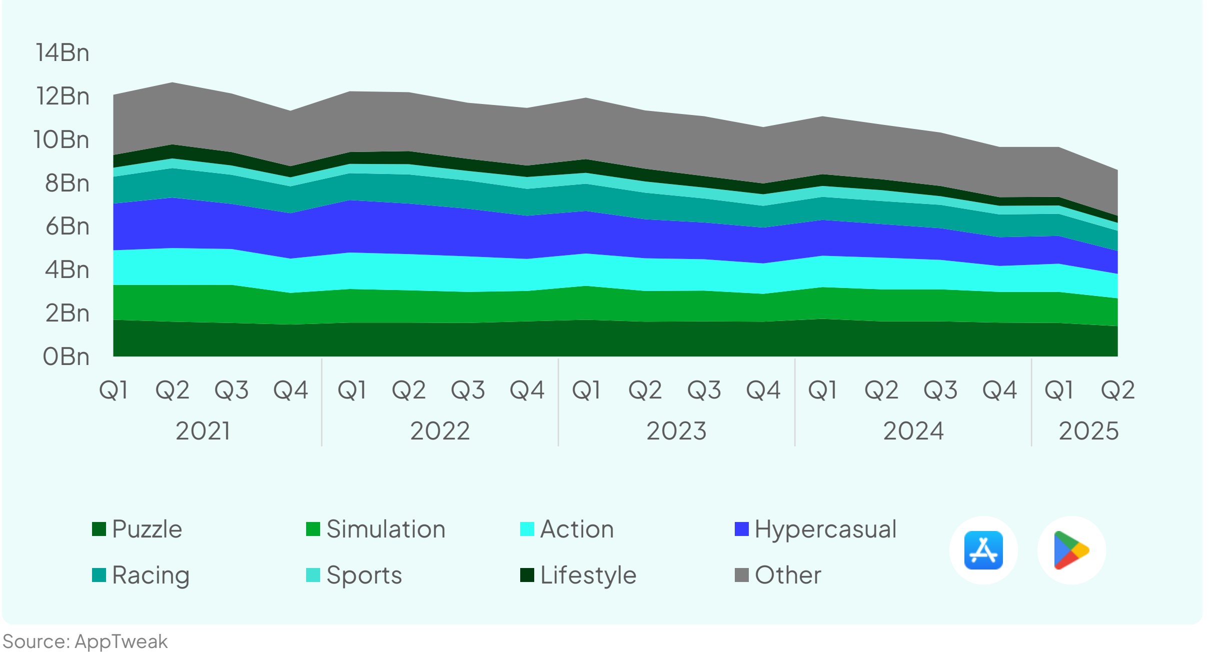
Fastest growing genres on PC & console (Q1 2021 – Q2 2025)

- ✓ Simulation: +117%, led by *The Sims 4*, *Euro Truck Simulator 2*, and *Farming Simulator 25*
- ✓ Role Playing: +70%, thanks to *Diablo IV*, *Baldur's Gate 3*, and *Monster Hunter Wilds*
- ✓ Sandbox: +54%, almost entirely driven by *Roblox* itself, especially after its PlayStation launch in October 2023

Mobile (AppTweak, Q1 2021 – Q2 2025)

Total downloads per quarter by genre

App Store & Google Play | Global | Q1 2021 – Q2 2025



Source: AppTweak

Most downloaded genres on mobile (average per quarter, Q1 2021–Q2 2025):

- ✓ Hypercasual: 1.8 billion downloads
- ✓ Puzzle: 1.6 billion
- ✓ Action: 1.5 billion
- ✓ Simulation: 1.5 billion
- ✓ Racing: 1.2 billion

Where Roblox overlaps—and where it doesn't

***Roblox* aligns more closely with mobile** than with PC/console, both in terms of genre preferences and design sensibilities.

- ✓ **Roleplay & Avatar Sim**, the platform's top genre, has no one-to-one equivalent elsewhere. It loosely maps to Life Sims like *The Sims* or *Animal Crossing*, but the *Roblox* version leans heavily into avatar expression, social storytelling, and emergent co-play—and it is entirely multiplayer by design.
- ✓ **Simulation** is a rare universal: it's *Roblox*'s #2 genre, a top-two genre on mobile by downloads, and the fastest-growing on PC/console. But even here, format matters. *Roblox* Simulations tend to be lightweight: loop-driven, idle-friendly, and designed for easy pick-up-and-play access.
- ✓ **Action** games exist across all platforms, but the flavor differs. *Roblox* Action games are often anime-inspired, mobile-paced, and ability-based. In contrast, PC/console Action games are more often realistic, tactical, and input-complex.

A mobile-like ecosystem

Roblox is not just mobile-first in platform usage. It also mirrors mobile more than PC or console in how games are built and played:

- ✓ Short sessions and casual pacing
- ✓ Minimal onboarding and low skill requirements
- ✓ Free-to-play core with monetization through cosmetics, gacha, and vanity items
- ✓ Social features baked into game design
- ✓ Continuous updates and live service support

However, as you'll see in the next section, *Roblox* more closely resembles platforms like YouTube and TikTok. While players may enjoy similar genres across ecosystems, the format, tone, and delivery model on *Roblox* are very different. For traditional developers, this means success on *Roblox* isn't just about matching genres—it's about adapting to the platform's native language.

Lessons from Gamefam: What it takes to succeed on Roblox

Even though genre overlap exists with traditional gaming platforms, *Roblox* is fundamentally a creative ecosystem with its own pace, cultural expectations, and discovery dynamics. For developers accustomed to PC, console, or mobile pipelines, entering *Roblox* requires more than just building the right genre. It demands a rethink of how games are scoped, produced, launched, iterated, and sustained.

To better understand what it takes to succeed, we spoke with **Gamefam**, one of the most experienced studios on the platform. Their advice reflects both the opportunities and the challenges facing traditional developers.

✓ What do you consider the key ingredients for a successful game launch on *Roblox* today?

Roblox is on the bleeding edge of the evolution of entertainment content, along with TikTok and YouTube. And we're seeing the same key usage pattern play out on *Roblox* that is playing out across the other Gen Z and Gen A entertainment platforms—trendiness.

If you look at *Roblox* in the last 12 months, there is a clear rise in trend-based gaming. *Fisch* changed the idea of how quickly a *Roblox* game could trend and grow. *Fisch* came and went, but built on a very similar core loop was the megahit *Grow a Garden*, right now probably the single most-played game in the world with 2-3 million peak daily CCUs and an all-time peak of 21M+. This growth all occurred within a few months of release.

The story of *Steal a Brainrot*, *99 Nights in the Forest*, and *Dead Rails*—all of the biggest *Roblox* hits of the last 12 months—is similar. These are all brand new games that took some proof of concept for a *Roblox* game loop and then simplified and synthesized it to become viral superhits.

All to say—the key ingredients are a deep connection with the meta of the platform, a simple and expandable game loop, and a big dash of pixie dust that makes the algorithm see something special in your KPIs.

Key implications

Rather than chasing technical polish or content depth, *Roblox* success often hinges on cultural relevance, speed to market, and responsiveness to player trends, more akin to content creation on social networks like TikTok and YouTube. Developers used to long production cycles may need to pivot to **short iteration loops, live feedback, and rapid content updates**. Even familiar genres can thrive if redesigned around early retention, minimal onboarding, and responsiveness to social momentum. Success is less about mechanical innovation and more about reducing barriers to play while maximizing shareability and replayability.

✓ What's your advice for traditional PC/console/mobile developers who are exploring *Roblox* for the first time?

Roblox is a new language for designing and publishing games, and it is, at this time, simply and perfectly incompatible with the way larger companies make and manage games. The fact is the platform has 1000s of games shipping per day and that *Roblox* players see little value in visual polish or depth of game design, so traditional teams are fundamentally disadvantaged on almost every vector of winning real estate in the algorithm.

So, the advice for traditional studios is to avoid the mistake of trying to develop on *Roblox* from scratch. In our estimation, non-native studios have a very low chance of achieving a top 10-20 game on the platform in their first 3-5 years vs. native developers, who are innumerable and growing.

It's a far more likely way to achieve success to invest into, or partner with a native team than to try and stand up a team of veteran pro developers on *Roblox*. There are not many native teams that are capable of partnering and collaborating with professionally managed companies—but there are a few that are outstanding. And, while this type of partnership will not guarantee success, it will give much better odds than working with non-native teams have."

Key implications

Roblox development favors native creators who understand the platform's culture and algorithm. For studios just entering the space, ***Roblox*-native partners** can accelerate learning and reduce risk. That doesn't mean in-house development is impossible, but it suggests a phased approach is smarter. Some traditional developers may benefit from starting with **co-development**, **UGC partnerships**, or **marketing activations** within existing *Roblox* experiences, rather than full standalone projects.

✓ How do you see *Roblox* evolving as a platform over the next few years? And how is Gamefam preparing for that future?

Gamefam has staked out a unique position in the *Roblox* ecosystem by creating innovative, impactful, and measurable ways for brands and IPs to achieve their marketing and business goals on *Roblox*. We are continuing to add new and existing games to our growing portfolio of games and are focused on bringing our brand and IP partners into those games. As *Roblox* continues to grow in users and pop culture relevance with Gen Z and Gen A, our opportunities to partner with developers and brands, to deliver amazing experiences to amazing communities continue to grow as well.

One of our key initiatives is the Gamefam Creator Fund where we make small investments into 10s or even 100s of games at time through our community connections built over almost 10 years of being on *Roblox* now. We love collaborating with native developers and helping connect the dots between the different spheres of gaming and media.

Key implications

Roblox's future may not be defined by standalone game hits alone. Increasingly, it's becoming a platform for brand storytelling, audience cultivation, and IP incubation. Traditional developers can treat *Roblox* not just as a publishing platform, but as a strategic funnel: a place to test creative concepts, build emotional bonds with younger audiences, and experiment with interactive format.

Conclusion

Roblox continues to evolve, from a youth-focused game platform to a dynamic, creator-driven entertainment ecosystem. Its player base is aging up, its genres are diversifying, and its development culture is maturing. For traditional developers and publishers, that shift presents a growing set of strategic opportunities, but also a demand for real adaptation.

Success on *Roblox* isn't just about following genre trends or porting mechanics. The ecosystem favors iterative loops over fixed pipelines, cultural fluency over graphical fidelity, and experimentation over polish. Whether through partnerships, experimental formats, or long-term investment in *Roblox*-native talent, developers who play the long game stand to benefit the most.

Summary of key insights and strategic implications

Theme	Key insight	Strategic implication
Audience & platform behavior	*Roblox* is mobile-first (80% of DAUs) and skews young, but the 13+ segment is growing fast.	Design for short sessions and mobile-style UX; create content that appeals to both Gen Alpha and maturing Gen Z players.
Multi-platform engagement	Only 24% of *Roblox* players are mobile-only; many also engage with PC and console games.	There is room to bridge players back to traditional games, especially through console-friendly genres and social multiplayer formats.
Top genres on *Roblox*	Most-played genres are Roleplay, Simulation, Survival, Hobby & Platformer, and Action.	Consider genre overlap when planning activations or adaptations; Simulation is a strong crossover genre across all platforms.
Design patterns	Successful *Roblox* games are social, expressive, low-friction, and trend-driven.	Build for creativity, self-expression, and drop-in/drop-out play; focus on trend alignment over complexity or visual fidelity.
Platform comparison	*Roblox* mirrors mobile more than PC/console in both pacing and monetization.	Adapt game loops and F2P mechanics to match *Roblox*'s mobile-like behaviors; avoid assumptions from premium/AAA design.
Native vs. traditional teams	Traditional devs may be disadvantaged when building alone on *Roblox*.	Start with partnerships or collaborations with *Roblox*-native creators to learn and de-risk; explore UGC, brand IP licensing, or support roles first.
Long-term role of *Roblox*	*Roblox* is increasingly a space for IP experimentation and Gen Z/Gen Alpha community building.	Treat *Roblox* not just as a game platform, but as a youth engagement strategy; use it for funneling, brand-building, and creative R&D.

03

The games market per region & country

Five regions and 35 countries/markets

This section in the full report covers the games market across five regions (North America, Latin America, Europe, the Middle East & Africa, and Asia-Pacific) and 35 markets. Each region summary highlights revenues and audience estimates, and average spend per payer, along with revenue forecasts by platform through 2028. The detailed country pages provide population, audience, revenue splits, and forecasts.

Please note that data in this chapter will be updated in November 2025 with the release of the November Quarterly Games Update. If you are reading this report after November 2025, please navigate to the Newzoo website to check for any new information.

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

Get all region and country breakdowns with Newzoo's Games Market Reports and Forecasts subscription. Take the product tour

Latin America | 2025

Rank	Metric	Estimate
#4	Population	
#4	Online population	
#4	Players	372.3M
#4	Payers	
#4	Game revenue	$8.3Bn
#4	Annual spend/payer	

A more platform-balanced, mobile-first, and Android-skewed region ranking fourth across all metrics.

✓ **Total players:** Up 4.5% year over year to 372.3 million.

- 69% of the online population is expected to play on at least one platform.
- Latin America has the fourth-largest player base out of the five regions.

Full Access

Platform statistics

PC

Players	
Highly engaged players	
Payers	
Big spenders	
Revenues	
Annual spend/payer	

Mobile

Players	
Highly engaged players	
Payers	
Big spenders	
Revenues	
Annual spend/payer	

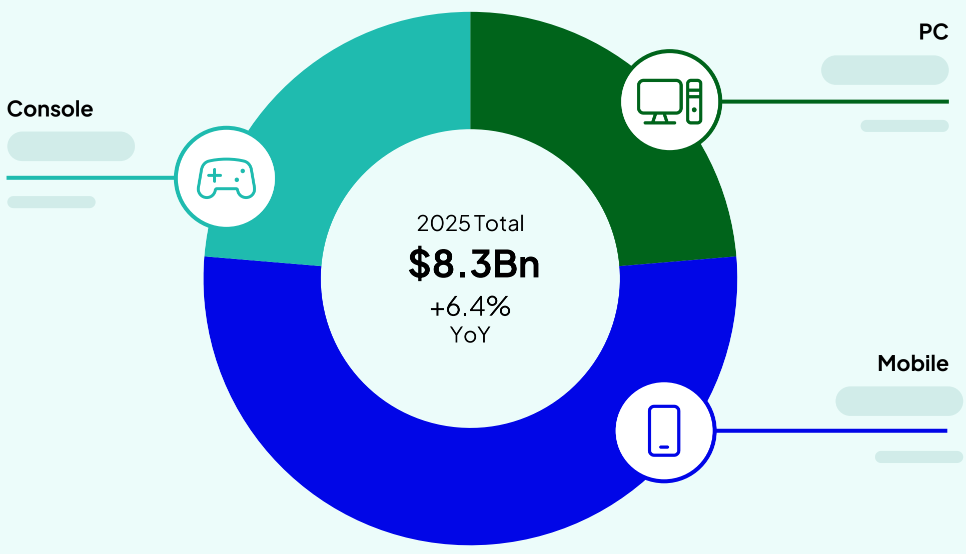
Console

Players	
Highly engaged players	
Payers	
Big spenders	
Revenues	
Annual spend/payer	

Revenue forecast

2025 Latin America games market

Per platform



Revenue forecasts

Per platform ($Bn)

Platform	2022	2023	2024	2025F	2026F	2027F	2028F	CAGR 22-25	CAGR 25-28
PC	Full Access								
Mobile									
Console									
Total									

Ecosystem players

Players per ecosystem

Latin America | 2025

Full Access

Players per ecosystem

Latin America | 2022-2025

Ecosystem	2022	2023	2024	2025F	CAGR 22-25
Steam	Full Access				
Epic Games store					
PlayStation					
Nintendo					
Xbox					
Android					
iOS					

Argentina

Market statistics

Population	
Online population	
Total players	
Total payers	
Total revenues ($M)	
Spent/payer total	

Market statistics

PC	
Players	
Highly engaged players	
Mobile	
Players	
Highly engaged players	
Console	
Players	
Highly engaged players	

Revenue forecasts per platform ($M)

Platform	2022	2023	2024	2025F	2026F	2027F	2028F	CAGR 22-25	CAGR 25-28
PC	Full Access								
Mobile									
Console									
Total									

04

Methodology and terminology

Methodology

Newzoo aims to provide the best possible market sizing and increasingly improve and integrate its data products to support its ambition to be the industry's most trustworthy data source.

This chapter outlines the definitions, scope, data sources, and methodologies underpinning the report. At the highest level, our market sizing metrics are organized around two key pillars:

- ✓ Audience
- ✓ Revenues

Most of Newzoo's market sizing is broken down by the three major gaming **platforms**:

- ✓ **PC:** Games downloaded from platforms like Steam or the Epic Games Store or bought as physical discs. This includes MMOs, MOBAs, and games on browser, casual gaming sites or social networks. Steam Deck and other PC handhelds are *included* in PC.
- ✓ **Console:** Games played on PlayStation, Xbox, or Nintendo hardware. It *excludes* Steam Deck and other PC handhelds.
- ✓ **Mobile:** Games played on smartphones or tablets. Spending through mobile web shops or other direct-to-consumer channels counted as mobile revenue, not PC browser.

Audience

Definitions

- ✓ **Players:** Individuals who have played video games on PC, console, mobile, or cloud platforms in the past six months.
- ✓ **Payers:** Individuals who have spent money on video games on PC, console, mobile, or cloud platforms in the past six months.

Data sources

Proprietary sources:

- ✓ Game Performance Monitor (GPM), engagement data in 37 markets for PC, PlayStation, Xbox, and Switch.
- ✓ Business & Store Intelligence (BSI), Steam platform engagement data.
- ✓ Global Gamer Study (GGS), survey data from over 73,000 respondents across 36 countries.

Public sources:

- ✓ UN population data (medium growth variant) .
- ✓ ITU internet and broadband penetration rates.

Partner & third-party data:

- ✓ AppTweak mobile app store intelligence.

Approach

We use a hybrid model combining top-down and bottom-up techniques:

Top-down:

- ✓ Start with UN population estimates.
- ✓ Apply internet penetration rates to derive the online population.
  - The model assumes that the online population size is a key driver of potential gamers and a proxy for future structural growth in a market's gamer base.
- ✓ Use broadband correction to refine PC and console accessibility.
  - The model assumes that the availability of broadband internet enables multiplayer and large-scale gaming. It primarily reduces the eligible audience in populous growth regions.

Bottom-up:

- ✓ Use the Global Gamer Study survey data to determine the share of respondents who play games.
- ✓ Apply platform-specific player shares to the total player estimates.
- ✓ Derive payer estimates by applying payer ratios from the survey.

Triangulation:

- ✓ We cross-validate estimates using multiple internal and external data sources and feedback.

Assumptions and adjustments

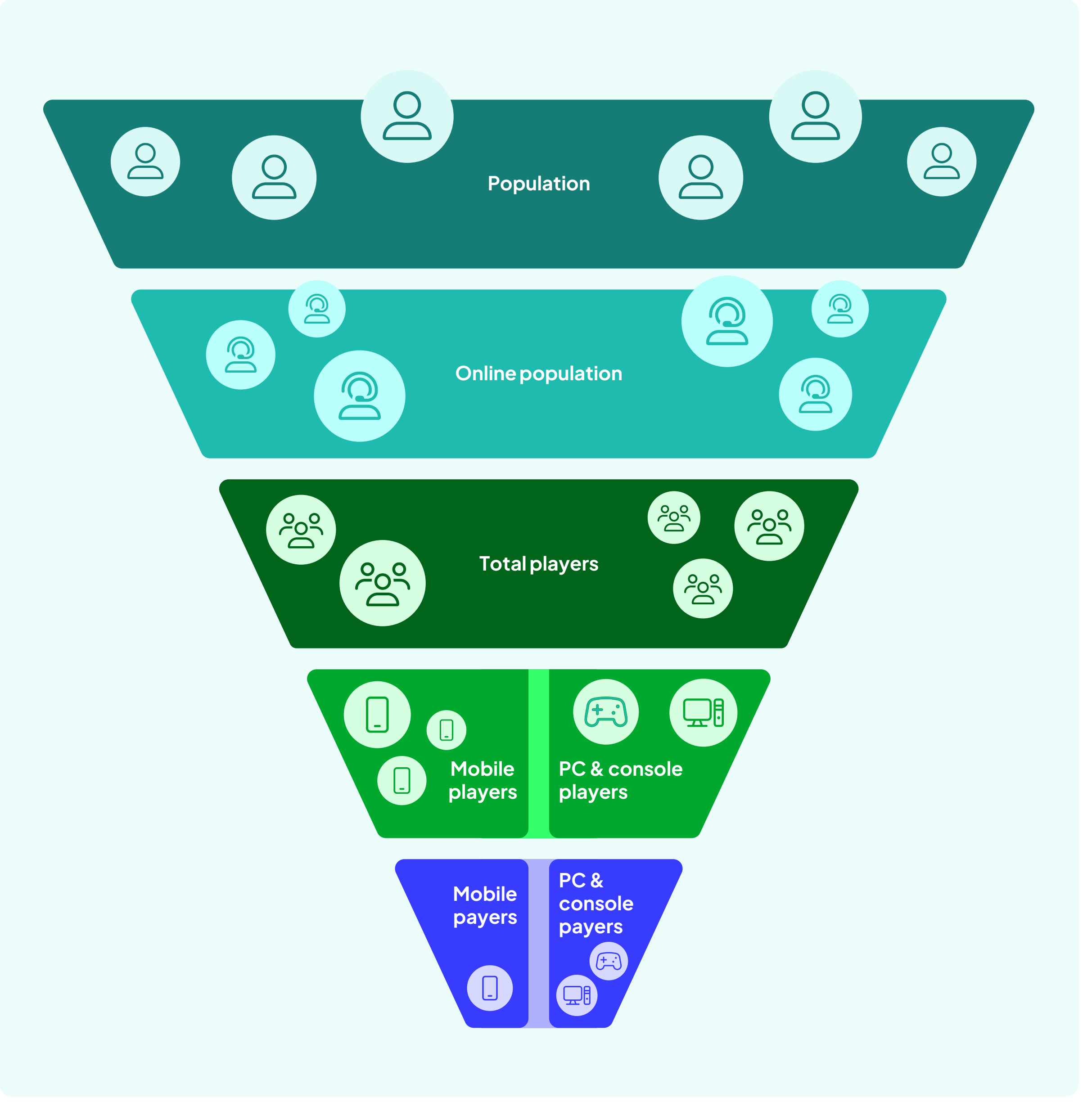
- ✓ **Data gaps:** Missing or incomplete data is addressed through modeling and proxy indicators for markets Newzoo does not survey.
  - **Non-survey markets:** We apply tailored assumptions based on regional dynamics and proxy markets. For example, we use the average player and payer shares from comparable Western European countries for non-surveyed markets like Ireland and Denmark.

Representation & product differences

- ✓ The Global Gamer Study covers people aged 10-65 in most countries and 10-50 in select emerging markets. More details can be found here.
  - Results in developed markets are nationally representative.
  - Parts of Latin America, Asia, the Middle East, and Africa reflect active internet users in developed residential areas. In China, the data focuses on Tier 1-2 cities.
- ✓ Differences between the Games Market Reports and Forecasts and the Global Gamer Study arise from age coverage and geographic focus. While this product uses the total population, depending on the market, our survey focuses on people ages 10-50 or 10-65 in developed residential areas.
- ✓ Additionally, when available, we prefer to use actual player data over self-reported survey data.

Audience funnel

Newzoo's audience market sizing per platform functions like a funnel, as shown below.



Revenue

Definitions

Revenue refers to consumer spending on software and services

✓ **Included:**

- Boxed and digital full-game purchases.
- In-game spending (microtransactions, DLC, in-game subscriptions).
- Console multi-game subscriptions (e.g., Xbox Game Pass, PlayStation Plus).

✓ **Excluded:**

- Taxes
- Second-hand trade
- Advertising
- Hardware
- B2B services
- Gambling

✓ **Geographic attribution:** Revenue is assigned to the country or region where the consumer resides, not where the company is headquartered.

✓ **Inflation:** Newzoo's forecasts are not adjusted for inflation.

Methodology overview – data to forecast

01. Data sources

Proprietary sources

- ✓ Game Performance Monitor: Engagement in 37 markets, revenue in six markets (PC, PlayStation, Xbox, Switch)
- ✓ Business & Store Intelligence: Steam platform engagement and revenue
- ✓ Global Gamer Study: 73,000+ respondents across 36 markets

Public sources

- ✓ IMF GDP per capita and World Bank household consumption data
- ✓ Company financial reports from 130+ public firms, private estimates (Valve, Epic Games)

Partner & third-party data

- ✓ AppTweak mobile store intelligence
- ✓ Client feedback from major global publishers
- ✓ Third-party research for triangulation

02. Modelling approach

Top-down market sizing

- ✓ Core predictive model sizes and forecasts market by platform and region

Company financials

- ✓ Covers 130+ public companies and private firm estimates
- ✓ Uses revenue (not bookings) for consistency
- ✓ Applies quarterly USD exchange rates to reflect actual spend
- ✓ Growth trends analyzed in local currency

Revenue allocation

- ✓ Platforms: GPM, BSI, AppTweak
- ✓ Regions: Public disclosures + modeled splits, even for private firms

03. Conceptual foundation

Conceptual foundation

- ✓ Forecasts driven by online population growth and Key Market Indicators (KMIs)
- ✓ Includes payer ratios, ARPPU, historical trends, cultural factors
- ✓ Iterative and granular review of assumptions vs. outputs
- ✓ Combines quantitative (metrics) with qualitative (culture, behavior, trends)

Terminology

Key metrics

Players. Individuals who have played video games on PC, console, mobile, or cloud platforms in the past six months.

Payers. Individuals who have spent money on video games on PC, console, mobile, or cloud platforms 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.

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

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 players. Those who played mobile games at least once in the past six months on an Android 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.

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.

Console games. Games played on PlayStation, Xbox, or Nintendo hardware. It excludes Steam Deck and other PC handhelds.

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 spending. Downloadable content is purchased from a digital store directly, not via in-game currency.

Epic Games Store players. We define Epic Games Store players as PC players who have played or downloaded games using the Epic Games launcher at least once in the past six months. This excludes Epic Games Store Mobile players.

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. It 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 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. Often referred to as live-service games.

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

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.

iOS players. Those who played mobile games at least once in the past six months on an iOS or iPadOS device.

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).

Microtransaction revenues. Revenue generated from microtransaction consumer spending, including but not limited to virtual currency, cosmetics, and battle passes.

Mobile games. Games played on smartphones or tablets. Spending through mobile web shops or other direct-to-consumer channels counted as mobile revenue, not PC browser.

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 that 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 must offer access to software and potentially provide the content through cloud streaming. Cloud services without content access are excluded.

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.

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.

PC games. Games downloaded from platforms like Steam or the Epic Games Store or bought as physical discs. This includes MMOs, MOBAs, and games on browser, casual gaming sites or social networks. Steam Deck and other PC handhelds are included in PC.

Peripherals. Gaming-related hardware products 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 previous-generation (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.

Steam players. Those who played games using the Steam launcher at least once in the past six months, including players using the Steam Deck.

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

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

Metric overview

Platform	Players	Payers	Revenue	Regional granularity	Available years
Total	✓	✓	✓	Market	2015-2028
PC	✓	✓	✓	Market	2015-2028
Steam	✓			Market	2020-2025
Epic Games Store	✓			Market	2020-2025
Console	✓	✓	✓	Market	2015-2028
PlayStation	✓			Market	2020-2025
Nintendo	✓			Market	2020-2025
Xbox	✓			Market	2020-2025
Mobile	✓	✓	✓	Market	2015-2028
Android	✓			Market	2020-2025
iOS	✓			Market	2020-2025
Genre			✓	Market	2022-2025
Cloud		✓	✓	Market	2020-2026
VR	✓ (install base)		✓	Regional	2016-2025

05

Work with Newzoo

What you get with a Games Market Reports and Forecasts subscription

	Free edition	Full subscription
The Global Games Market Report, our flagship annual report, including three quarterly updates	67-page preview	199-page full report
Global and regional player and revenue forecasts per platform (PC, console, mobile)	Preview	✓
Downloadable data sets in Excel	-	✓
Report Data Tools for visualization and analysis	-	✓
Five special focus topics		
Play it again: Revisiting the past for modern success	Preview	Full 17-page analysis
Modernizing release windows: Data-driven launch insights	9-page highlights	Full 17-page analysis
The $80 dilemma: A new price ceiling or too soon?	Preview	Full 16-page analysis
The long game: How post-launch content fuels engagement	Highlights release in November	Full 14-page analysis
Unboxing Roblox: User trends, genre insights, and strategic fit	Highlights release in October	Full 12-page analysis
Detailed revenue and audience breakdowns		
Game revenue by business model per platform from 2015 to 2028	-	✓
Game revenues by genre per platform from 2022 to 2025	Preview	✓
Region-level revenues, players, payers, active VR install base and game revenues, cloud gaming revenues and paying users, and players per ecosystem	Preview	✓
Country-level revenues, players, payers, cloud gaming revenues, and paying users, and players per ecosystem	-	✓

Take the product tour

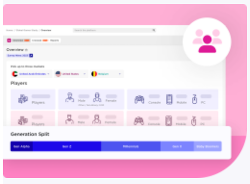
The data and insights powering this report

We use data from our product portfolio and proprietary sources to inform our market analysis and industry expertise.

GAMES DATA

Game Performance Monitor

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



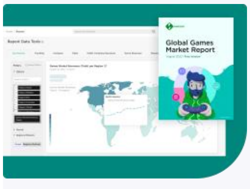
GAMER RESEARCH

Global Gamer Study

Access the largest and deepest gamer survey in the world, profiling tens of thousands of gamers worldwide yearly.

Game Health Tracker

Track title-level demographics, consumer insights, and weekly awareness, hype, and purchase intent.



MARKET INTELLIGENCE

Games Market Reports & Forecasts

Discover games market sizing & forecasts for 100+ countries and the key trends on a global and local level.

STORE INSIGHTS

Business & Store Intelligence

Optimize your storefront presence and track your games' marketing and sales performance on PlayStation, Steam and Xbox.

CONTACT SALES

ANY QUESTIONS? QUESTIONS@NEWZOO.COM

Consulting & Custom Research Services

Tailored consulting and research for every stage of the game development and operation lifecycle

01

LONG-TERM STRATEGY

Where should our business be in 5/10 years?

Forecast market and player trends, competitor analysis, IP & partnerships.

02

CONCEPT & GAME DEVELOPMENT

What is going to be our next hit title?

Concept testing, forecasting, audience profiling & segmentation.

Greenlight

03

PRE-LAUNCH & GO TO MARKET

How do we effectively market our game?

Pricing strategy, launch planning, campaign & content testing

Launch

04

POST-LAUNCH & MONETIZATION

How can we further monetize our game (premium, live ops, DLC, in-game)?

Brand health, retention & UA modeling, live service strategy.

CONTACT SALES