

Real Opportunities For AI In Game Development, Publishing, And Player Experiences

How Leaders Are Turning To Emerging Tech To Boost Workflows And Innovation

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY AWS MARKETPLACE, NOVEMBER 2025



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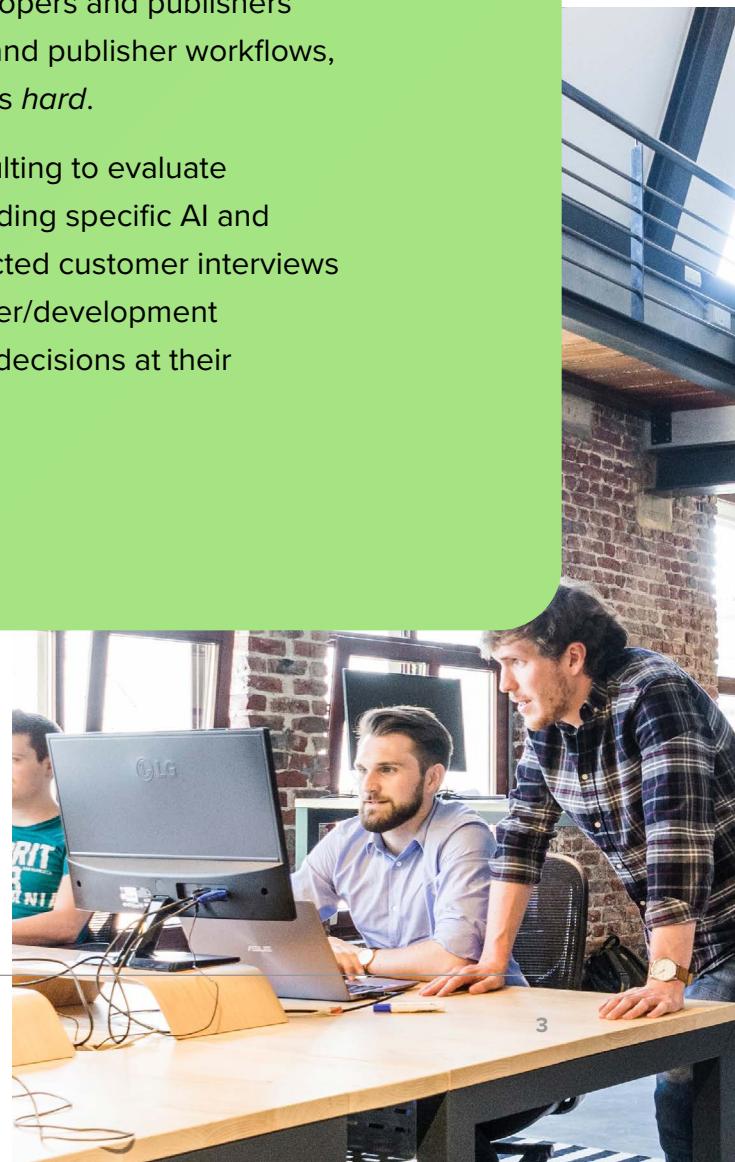
Executive Summary

The games industry has cemented itself as a dominant force in global entertainment. Forrester research shows that last year, 78% of online US adults played games on a device daily.¹ Spanning console, smartphone, PC, even VR headsets, barriers to entry have become virtually nonexistent.²

Despite this growth in players, the market has become more crowded and competitive than ever. Small, independent game studios routinely compete with larger incumbents, together launching thousands of games into a saturated and competitive market. Meanwhile, players are demanding ever-evolving experiences and more content.

Developers and publishers of all sizes need help to stay on top of this constantly accelerating treadmill. AI is being evaluated as an answer to this impossible ask. AI is anticipated to unlock new gameplay opportunities, personalize game experiences, and improve game developers' ability to scale content production.³ However, while developers and publishers recognize AI's potential to supplement developer and publisher workflows, even with massive advancements in the space, AI is *hard*.

In June 2025, AWS commissioned Forrester Consulting to evaluate the state of game developers and publishers, including specific AI and generative AI (genAI) capabilities. Forrester conducted customer interviews and an online survey with 521 global game publisher/development decision-makers who influence technology and AI decisions at their organization to explore this topic.



Key Findings

AI in games is hard. For 76% of game publishers and developers, making AI useful to the business is difficult. They covet speed and time to market but fall short in embedding AI in workflows. Production AI workloads improving player or employee experiences were present but rare due to a lack of available resources to focus on AI, poor data readiness, and complicated governance.

Developers and publishers still have a long AI runway. Just 21% of respondents were in the Leader category for AI strategy and AI data and governance practices. All organizations, regardless of maturity level, can take steps to shore up their AI behaviors to receive greater payoffs.

Game organizations need people, process, and technology help. They struggle to move quickly as poor AI integration and outputs hamstring innovation and player experiences. Further barriers with risk, legal, talent, and compliance hurt their ability to innovate and compete.

Decision-makers must lean on third-party support. The days of gaming self-sufficiency are over because everyone working in gaming is too busy making games. Developers and publishers must partner with providers who understand their workflows and offer industry-specific solutions to enable AI tools, better processes, and greater speed to market.

GenAI will transform game development and publishing processes. Organizations that succeeded in bringing genAI use cases to production saw improvements to development/code velocity and player insights, leading to better employee workflows, faster speed to market, and better player experiences.

Game Organizations Are Turning To AI To Move Faster

Game developers everywhere are competing for players' attention. Independent studios are able to develop games and acquire a modest player base through lower cost experimentation and iteration, proving they can survive with modest success and less consequence from failure. But even in this environment, competition is fierce and ever-growing.

On the top end of the market, the same popular game franchises consistently capture huge portions of player time. As a director of corporate insights noted, "This [market] oversaturation is evident when you see the top 10 most played games have been the same since 2015." As a result, the cost to create an audience for a game — and effectively take market share from these titles — is prohibitively high. Faced with this sustained pressure from both independent studios and industry juggernauts, established game developers and publishers are struggling.

"Whenever you're releasing a new game, you have to take into consideration: Will we be able to make a dent in the player bases and will that be sufficient to pay off the investment we made five years ago on this product?"

DIRECTOR OF CORPORATE INSIGHTS, GAME PUBLISHER/DEVELOPER

So, where to go? Surveyed developers and publishers said that they're primarily focused on cultivating existing audiences and games (see Figure 1). In fact, fewer than 50% of respondents report developing new games as a priority over the next year. To support what player base they've been able to cultivate, respondents' organizations are desperately prioritizing better

speed and developer workflows to introduce new content and features and satisfy player demand (see Figure 2). This is where third parties and where — potentially — AI can add value. Decision-makers said that they’re adopting genAI across several business functions to help drive the following outcomes (see Figure 3):

- **Accelerate game production.** Seventy-eight percent of respondents seek faster game creation from genAI. A director of corporate insights noted, “Game development is a pretty complex and long process.” The investment cycle required for a new game is often years. Because of this, any ability to speed up the process outweighs traditional capital advantages. Growing a team doesn’t linearly speed up their part of the development cycle but the ability to massively speed up the work of every individual in a given team *would*. A director of product operations saw opportunities with AI, noting, “The impact that AI will have in the speed of delivering new games is massive.”
- **Cut production costs.** About three in four respondents said they are driven to genAI to reduce costs involved in developing and publishing games. By streamlining game development workflows, improving player insights, and, importantly, freeing up employee time from mundane and repeated tasks, organizations can maximize resources and focus on generating new and better player experiences.
- **Improve player experiences.** Seven in 10 respondents were interested in genAI’s ability to directly enhance player experiences, i.e., by enabling players to interact more directly with AI (e.g., through dynamically generated animation sequences, AI-powered NPCs, or more personalized experiences).

“Specifically in mobile gaming, the need to execute and deliver publishing updates fast is levels of magnitude higher.”

DIRECTOR OF PRODUCT OPERATIONS, GAME PUBLISHER/DEVELOPER

“One of the biggest impacts on the industry will be the speed at which you can develop high production values. The overall quality of the graphical part of the games will improve, and I think that will be beneficial for the players.”

DIRECTOR OF PRODUCT OPERATIONS, GAME PUBLISHER/DEVELOPER

FIGURE 1

“Which of the following strategic initiatives are likely to be your organization’s most important over the next 12 months?”

75% Supporting/updating/operating existing games

68% Developing community engagement

66% Growing our user base

61% Experimenting with new gameplay experiences

48% Developing new games

Less than 50% report “developing new games” as a 2026 priority

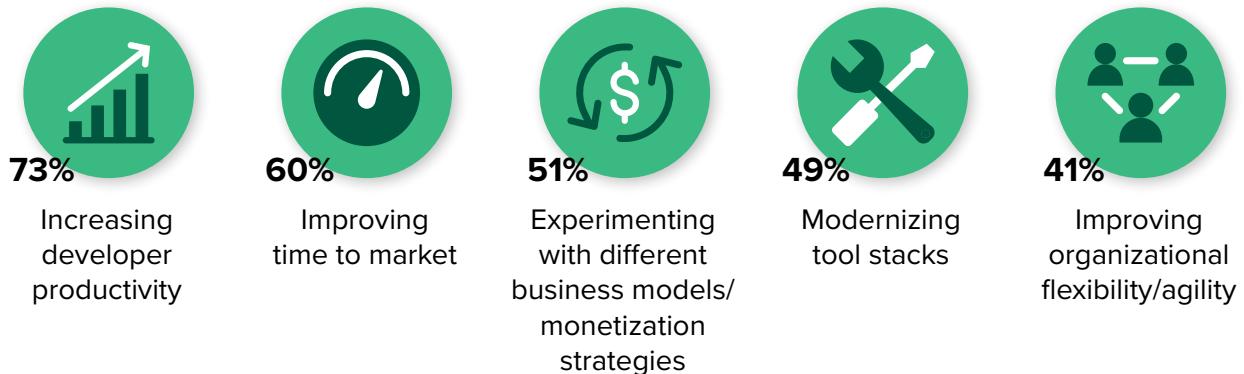
46% Developing greater differentiation in the market

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

FIGURE 2

“Which of the following operational initiatives are likely to be your organization’s most important over the next 12 months?”



Note: Showing top five responses

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

FIGURE 3

“Which of the following departments/functions at your organization are currently experimenting with or using genAI?”



Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

AI IN GAMES IS HARD

Despite having clear objectives and strategic direction for adopting AI, getting AI right is difficult. While 73% of respondents felt it is critical to adopt AI and genAI to stay competitive, **76% of respondents also agreed that making AI useful to the business is hard.** Employees closer to the actual development and publishing underscore this fact; 55% of respondents at the VP/C-level said that their AI capabilities augment human workflows; however, that number falls to 43% when directors and managers weigh in, suggesting that organizations aren't performing as well as perceived with their AI initiatives.

For an industry that has long leaned on self-sufficiency, games industry decision-makers realize that they need help with AI to successfully compete. According to a director of product operations: "You need a lot of resources. You need a data scientist. You need ML [machine language] engineers. You need product people. You need a lot of bandwidth to test your hypothesis. It's not as easy as it sounds." Counterintuitively, this friction is stronger with larger organizations who also run into contradicting directions from different parts of the organization. For example, leadership may advocate for AI internally but fail to fund additional people resources, or legal may place limitations on how AI can be leveraged, directly impeding adoption.

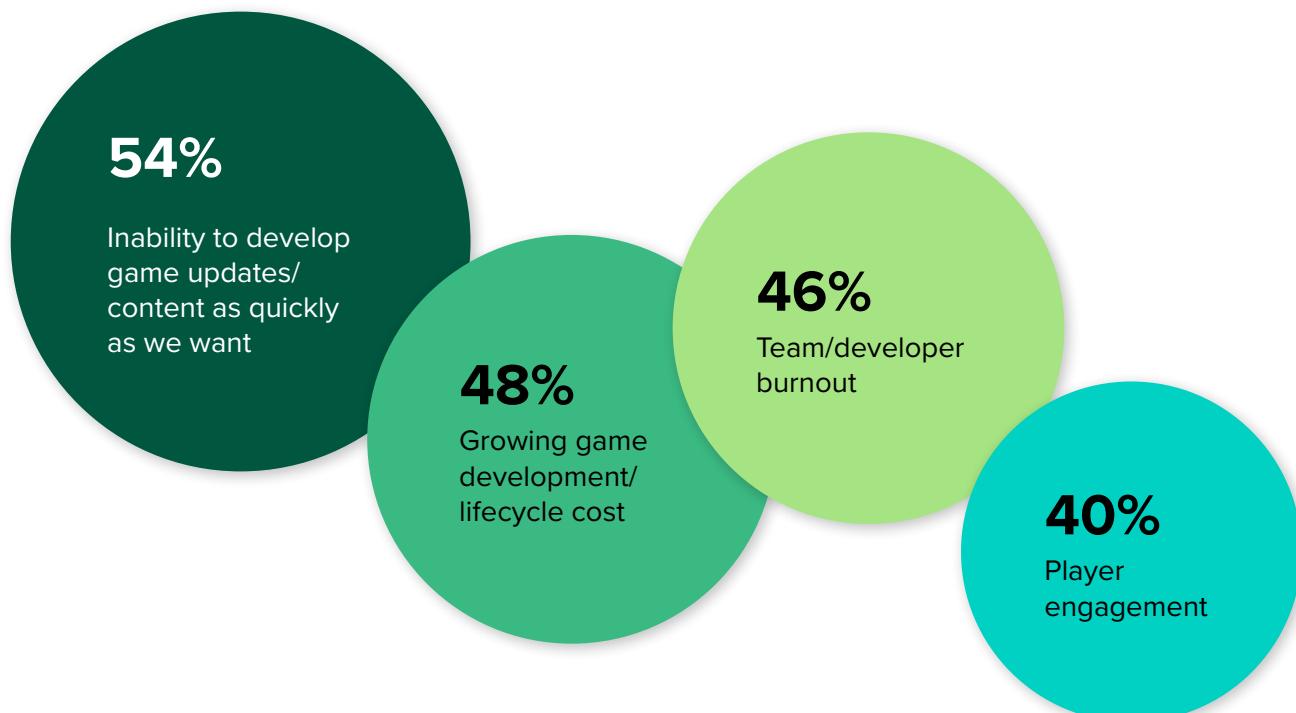
Decision-Makers Grapple With Complexity Across People, Process, And Technology

As game organizations rapidly evolve, they will be tasked to navigate complex technical challenges, mitigate risk, and ensure compliance.⁴ Employee experience is also a hot-button topic as many employees fear loss of work in the face of greater AI functionality.

This study confirmed these hurdles as organizations are struggling to move with the speed, certainty, and employee satisfaction they require to successfully compete (see Figure 4).

FIGURE 4

“What are the top challenges your organization currently experiences?”



Note: Showing top four responses

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

Additionally, 46% of decision-makers reported team/developer burnout is a top challenge that their organization currently faces. Respondents said that their challenges across the organization ladder up to:

- **Stifle competitiveness.** Almost half (47%) of respondents linked their current challenges with a weaker ability to compete. Decision-makers at director and manager levels were more likely to acknowledge poor competitiveness compared to their VP and C-level counterparts, suggesting that game leaders must take a harder look at what's hindering organizational goals.
- **Raise costs.** Forty-four percent of decision-makers said that their current challenges add to development costs, in turn hurting process efficiency and sucking resources from value-add activities like new and improved player experiences.
- **Hamper innovation and player experiences.** Four in 10 said that current challenges impede both player experiences and their ability to innovate.

“Our C-suite has basically told legal that we need to start accepting some of this risk [with emerging tools].”

STUDIO MANAGER, MOBILE,
GAME PUBLISHER/DEVELOPER

AI ADDS OPPORTUNITY AND MORE COMPLEXITY

How does AI factor into these challenges? As game organizations increasingly adopt AI — and recognize how difficult it is to harness — they confront considerable risk and unexpected consequences.

Stakes for AI are often greater than anticipated, and respondents told us that their current genAI outputs lack reliability, proper workflow integration, and gaming-specific resources. Failing to get genAI — and resulting player experiences — right stands to frustrate employees, alienate players, and undermine the business.

Understanding AI Maturity Is The Starting Point For AI Success

In this study, we posed a number of statements to respondents spanning AI strategy and AI data and governance practices to develop a model that represents AI maturity for game developers and publishers. We found that 21% of respondents' game organizations scored in the Leader category, with 42% in the Intermediate category and 37% in the Laggard category (see Figure 5).

We also discovered several actions and behaviors that gaming organizations embody that separate Leaders from Laggards (see Figure 6). Leaders in AI are more likely than Laggards to be experimenting with new gameplay experiences; increasing usage of third-party tools for core game development; and experimenting with genAI in programming and engineering functions.

“We have tools that take 2D assets and [turn them] into 3D assets. That’s one of the AI use cases.”

STUDIO MANAGER, MOBILE,
GAME PUBLISHER/DEVELOPER



FIGURE 5

Maturity Model

We graded respondents across the following areas to gauge level of AI maturity:*

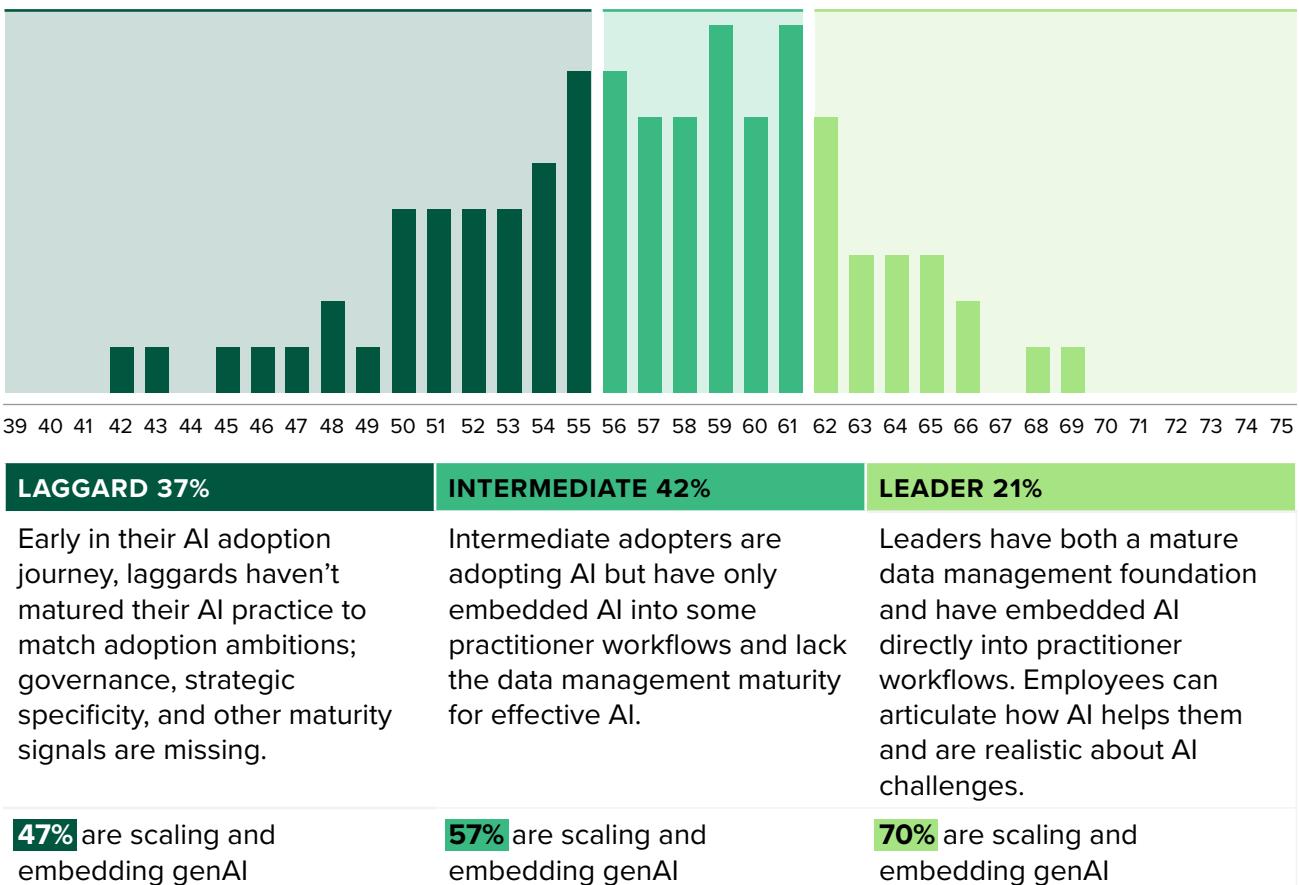
1. STRATEGY

“How well do the following statements describe your organization’s overall strategy for using AI?”

2. DATA AND GOVERNANCE

“How well do the following statements describe your organization’s approach to AI governance and data management?”

MATURITY	LAGGARD	INTERMEDIATE	LEADER
NUMBER OF RESPONDENTS	195	217	109
MATURITY SCORING RANGE	0 to 55	56 to 61	62 to 80



*Note: Full maturity statements can be found in the appendix

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

FIGURE 6

Key Actions Of Game Organizations With High AI-Maturity: A Comparison Of Leaders Vs. Laggards

AI INVESTMENT	GAME PLANNING	GAME DEVELOPMENT
<p>Leaders are:</p> <p>22% more likely to invest in AI model security.</p> <p>18% more likely to invest in AI training.</p> <p>21% less likely to have to establish AI data cleaning efforts.</p>	<p>Leaders are:</p> <p>20% more likely to use AI to draft and prototype assets, such as drafting character models.</p> <p>19% more likely to use AI to prototype features and gameplay mechanics.</p> <p>19% more likely to have clear policies to ensure the responsible and ethical use of genAI.</p> <p>13% less likely to use AI to support project management tasks, such as drafting project plans and timelines.</p>	<p>Leaders are:</p> <p>46% more likely to explore use cases for how agentic AI can add value to the business.</p> <p>26% more likely to be adopting genAI to improve employee productivity.</p> <p>43% less likely to use AI for audio generation, such as voice synthesis and music generation.</p> <p>42% less likely to use AI for quality assurance and testing.</p>
GAME PUBLISHING	USER EXPERIENCE	CUSTOMER SUPPORT
<p>Leaders are:</p> <p>72% more likely to enhance accessibility support.</p>	<p>Leaders are:</p> <p>23% more likely to be adopting genAI to improve gameplay innovation.</p> <p>22% more likely to experiment with developing new AI game mechanics, such as integrating new AI models into NPCs or dynamic content generation.</p> <p>18% more likely to improve performance through AI, such as support for frame generation like deep learning super sampling (DLSS).</p> <p>23% less likely to be developing new games.</p>	<p>Leaders are:</p> <p>16% more likely to use agentic AI tools to accelerate or automate customer support.</p> <p>16% more likely to improve predictive support and automated troubleshooting of technical challenges, such as AIOps.</p> <p>27% less likely to use AI for content recommendations and dynamic playlists.</p>

Base: 304 gaming publisher/development decision-makers whose organizations fall into the Leader or Laggard maturity categories

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

Game Organizations Require Trusted Partner Support To Succeed

Respondents were clear that the path forward means partnering with strategic tech providers (64%) to enable key goals. Two in three also said the top action their organization is taking to achieve their goals is increasing their usage of third-party tools to support the development lifecycle.

Where do partners step in? They can help all game studios augment their labor force with missing skill sets — especially in specialist areas (e.g., data collection and tracking). A director of corporate insights said, “Third-party vendors [can] do the work that a centralized analytics and data engineering team would be doing.” Partner providers can also add industry expertise, process know-how, and gaming-specific solutions. Many game developers and publishers lack free time and resources. They need partners that understand their unique workflows, how their organization operates, and industry best practices.

GENAI STANDS TO REVOLUTIONIZE PLAYER EXPERIENCES AND GAME OPERATIONS

Developers and publishers aspire to do more with genAI. Over half (57%) planned to expand the number of use cases for genAI to achieve their top goals. Three in four said their organizations plan to invest more in AI tools (e.g., premade AI tools and AI model security and governance) to support

“There’s a huge debate that users will be able to tell the difference between something made by AI and not. I disagree. I’ve seen games that were entirely developed by AI and the quality is superb.”

DIRECTOR OF PRODUCT OPERATIONS, GAME PUBLISHER/DEVELOPER

game development/publishing, and one in three planned to increase their investment by more than 10%. Game organizations can push the boundaries of visual content and leverage these advancements to tailor content to individual preference and enhance player engagement.

As developers and publishers experiment with genAI, they're already generating encouraging content and improving output consistency. Looking forward, respondents expect that genAI will have the greatest impact on coding, asset creation, and playtesting (see Figure 7). Marketing efforts are also benefitting from genAI. A director of product operations said, "There's a huge amount of marketing spend around static images, banners, and everything in between." Decision-makers expect that the investments they make into genAI will do the following (see Figure 8):

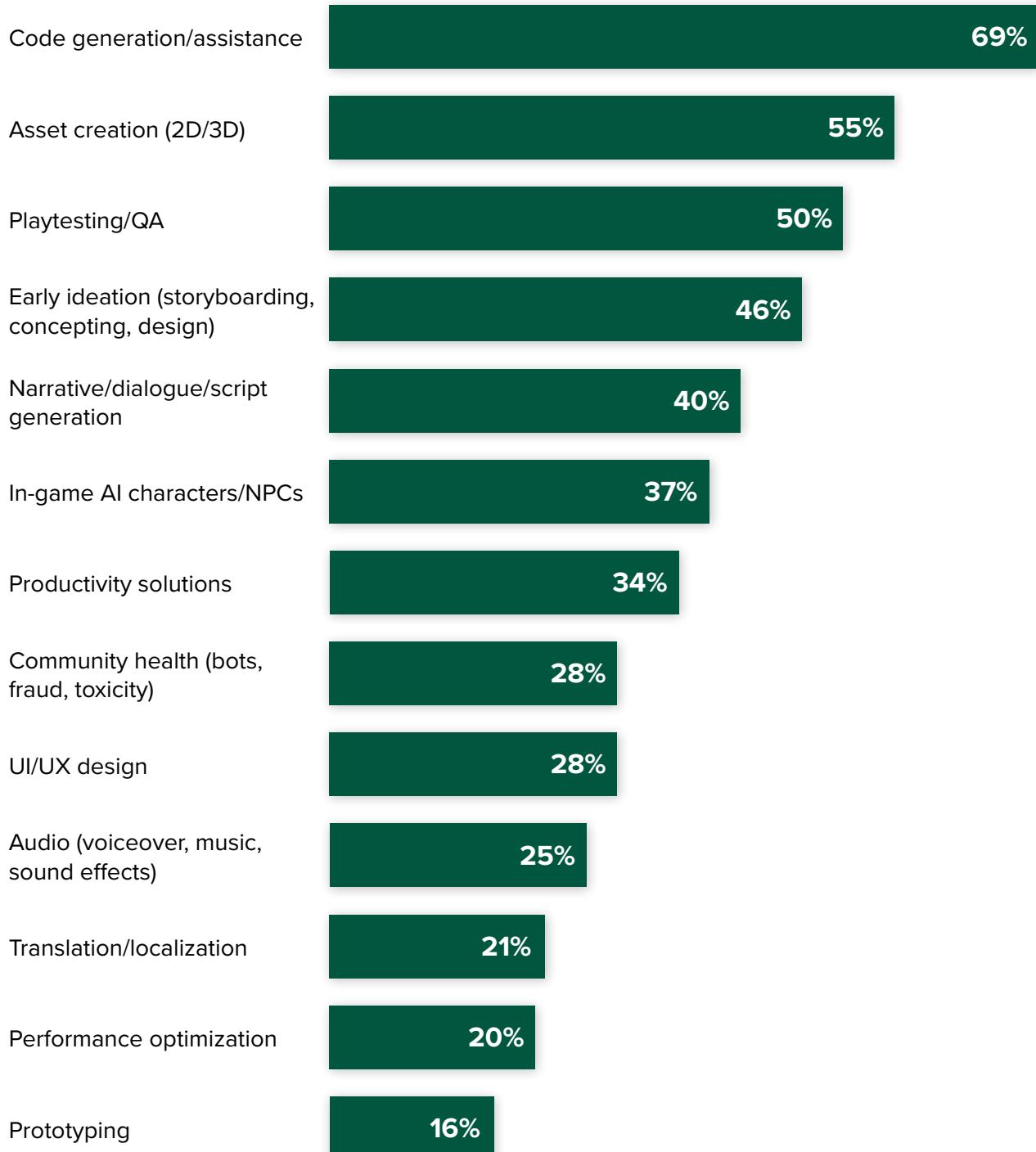
- **Improve development and publishing workflows.** Seventy-seven percent of decision-makers expected that their genAI investments will improve employee efficiency. One director of operations said: "The big question is, when you have this increase in productivity for developers, what do you do? Do you do the same with fewer developers, or do more with the same number of developers? That's the debate of the industry right now."

"We have our user research department and the customer research department that will be using genAI to summarize feedback from players. ... In our marketing, we're using social scraping and genAI to build summaries of what is being talked about in socials. We're using genAI as well when it comes to creating the first concept of products."

DIRECTOR OF CORPORATE INSIGHTS, GAME PUBLISHER/DEVELOPER

FIGURE 7

“Where do you expect genAI capabilities to have the most impact on your organization over the next two to three years?”



Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

FIGURE 8

“Over the next two to three years, how much do you see investments in genAI improving your organization’s ability to do the following?”

(Showing “Significant improvement” and “Transformational improvement”)



Note: Showing top five responses

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

- **Accelerate speed to market.** Almost three in four respondents anticipated faster time to market from their genAI investments. One studio manager shared that their team redesigned their biggest content pipeline processes, noting, “In terms of time saved, it’s probably a 15% time reduction.”
- **Enhance player experiences.** Seven in 10 respondents expected to generate new and improved player experiences from their genAI investments (e.g., by summarizing player feedback). One director of corporate insights added, “We’re experimenting with trying to understand the emotional cycle of a player: how the emotional response of a player could be inferred from within the game.”

“When it comes to genAI content generation, a lot of it is creating ads [and] creating LiveOps content.”

STUDIO MANAGER, MOBILE, GAME PUBLISHER/DEVELOPER

PERSPECTIVES ON AI AND THE GAMES INDUSTRY

“Preparing [AI] training data for fine-tuning is pretty difficult. We’re just about learning how to do this properly. Fine-tuning is also not free. We’re finding out what those costs are now and what that means.”

“With agentic AI, the one use case that’s coming up is as a player-facing feature. You can play an NPC, and you can ask the questions or it can support you in the game. Right now, we’re trying to figure out how to do that.”

“The skill set that we’re looking for is different. [Employees] need to be hungry. They need to be curious. They need to have a growth mindset. That’s not just artists. I feel like that’s probably going to be required for game teams in the future.”

STUDIO MANAGER

PERSPECTIVES ON AI AND THE GAMES INDUSTRY

“The level of AI and the tools that we have is mostly around cloning new stuff or getting what’s already there — basically optimizing and changing look and feel. That’s not small. With that, you enable thousands of new people to make a living out of games and that, I think, will create the next round of big innovators.”

“What every company in the game space is trying to do is to automate live operations. ... We’ll release [a game], and then offer discounts. All of that until a couple of years ago was manual.”

“Building this holistic view of the user considering different parameters is usually what everyone is trying to achieve with the cloud: Uploading all the data from different systems into one unified cloud that these different LLMs can consume. Then you can create these automated rules.”

DIRECTOR OF PRODUCT OPERATIONS

PERSPECTIVES ON AI AND THE GAMES INDUSTRY

“Stop thinking about AI first. Focus first on data quality and what data you’re giving to AI tools. AI is great at taking out the processes, simplifying them, and removing the need to be doing long, complex processes. The inputs and the outputs have to be managed by a human component to make sure that it’s keeping the process but not the results.”

“The data is a lot. We’re storing it somewhere. Obviously, that means that it will be feeding into the AI tools. It’s expensive. It’s costly. It’s sometimes unmanaged and left there to rot. ... What is [the] outlook on future of data? How much of the data is being used? How much of reusing that data is actually good practice?”

“We’re using [genAI] in the process of forecasting where we’re using competitor titles and benchmarking in multiple directions. That could be both performance-related or even game content-related. ... We are using genAI in the process of gathering data and summarizing it. When it comes to creating tons of product description pages from storefronts, genAI helps us summarize that [and] select a specific product out of thousands.”

DIRECTOR OF CORPORATE INSIGHTS

Key Recommendations

Forrester's customer interviews and in-depth survey of 521 game developer and publisher decision-makers yielded several important recommendations:

Target processes that cause burnout in your organization for automation.

A challenge many organizations face is rating down their investments to target specific tasks in a bid to automate as much work as possible. Effective automation using AI requires your employees' participation. Work with your employees to identify their most "toil" tasks — those with high repetition and low creative value — for your initial use cases and plan for "human in the loop." Instead of targeting asset generation, target a specific subprocess like mood-board assembly. Do not plan on labor force reduction.

Align legal and executive expectations. Organizations are torn between two priorities: transforming the business to be more competitive and, simultaneously, reducing the risk to the business that transformation poses. With AI initiatives, it's common for executives to set one objective while legal mandates inadvertently halt the efforts. The net result is limited progress and frustrated stakeholders. Bidirectional alignment — honest, equal position sharing — between legal, executive, and operational teams should be one of the first steps taken in pursuing an AI initiative to set a realistic expectation of what the business can accomplish. You need to get everyone on the same page and sometimes this means having everyone in the same room.

Develop your data foundation. Regardless if you're tuning your own models or attempting to leverage-off-the-shelf AI tools, you need a solid data foundation. This means a few things: You are funding data indexing and knowledge management efforts, prioritizing data quality and maintenance efforts, and working on robust annotation and tagging efforts to help AI. Knowing what data you have available to provide as either instructional documentation to AI agents or training data to AI models will provide you with a better ability to gauge where to invest efforts. To tune outputs — especially

visual asset generation — you’re going to need a significant corpus of annotated training data, and care and feeding is an ordeal.

Work with partners who understand games. By their own admission, game makers need AI to help them become more competitive but will need assistance to adopt it. The skills required are in short demand, and most game developers are too busy making games. While gaming has a reflex to DIY, partnering with strategic technology providers is increasingly required to make AI work. Seek those with dedicated gaming services *and* practices.

Appendix A: Methodology

In this study, Forrester conducted customer interviews and an online survey of 521 game publisher/development decision-makers who influence technology and AI decisions at their organization to evaluate the state of game organizations. Survey participants included decision-makers in IT and line-of-business (LOB) roles at the manager level and above. Questions provided to the participants asked about priorities, challenges, and future plans around their organizations' technology infrastructure. Respondents were offered a small incentive as a thank-you for time spent on the survey. The study began in July 2025 and was completed in August 2025.

Appendix B: Maturity Assessment

FIGURE A

“How well do the following statements describe your organization’s overall strategy for using AI?”

We have a clear strategy for how we want to use and apply AI to support our business goals

74%

We are investing in employee upskilling to improve our use of AI

55%

There is strong companywide awareness of AI initiatives

53%

Our AI capabilities are well-integrated into our existing tools and workflows*

50%

Employees can articulate how AI is making their lives better*

48%

Our AI capabilities augment our human workflows*

46%

Note: Showing “Mostly/Completely describes my organization”

*Note: Given double weight in maturity scoring

Base: 521 gaming publisher/development decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of AWS, August 2025

FIGURE B

“How well do the following statements describe your organization’s approach to AI governance and data management?”

We are actively funding data and knowledge management efforts*

73%

We require our human workforce to regularly review AI data inputs and outputs to maintain the integrity of our work

59%

We have robust data management and hygiene practices to support high-quality output for AI models*

55%

We have connected AI operating models and governance mechanisms

54%

We have up-to-date AI security frameworks to mitigate enterprise risk

44%

Appendix C: Demographics

REGION	
North America	44%
APAC	26%
EMEA	25%
LATAM	5%

REVENUE	
>\$1B	4%
\$500B to \$1B	16%
\$100M to \$499M	18%
\$50M to \$99M	13%
\$10M to \$49M	25%
\$1M to \$9M	25%

POSITION	
C-level executive	8%
Vice president	21%
Director	31%
Manager	40%

TOP 5 COUNTRIES	
US	34%
Canada	10%
Japan	9%
South Korea	7%
Brazil	5%

SUBINDUSTRY	
Game developer	54%
Game publisher	46%

TOP 5 FUNCTIONS	
Business/finance/HR	21%
Production/project management	17%
Publishing	13%
Programming/engineering	11%
Marketing/community management	8%

Note: Percentages may not total 100 due to rounding.

Appendix D: Supplemental Material

RELATED FORRESTER RESEARCH

[Consumer Insights: US Adoption And Usage Of Virtual And Augmented Reality, 2024](#), Forrester Research, Inc., March 28, 2025.

ADDITIONAL RESOURCES

[Consumer Insights: US Youth, 2025](#), Forrester Research, Inc., May 29, 2025.

Appendix E: Endnotes

¹ Source: [Consumer Technology Topic Insights Survey](#).

² Source: [Consumer Insights: US Gaming, 2024](#), Forrester Research, Inc., January 16, 2025.

³ Source: [The State Of Generative AI For Visual Content, 2025](#), Forrester Research, Inc., January 23, 2025.

⁴ Ibid.



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