



newzoo



NEWZOO'S

# GLOBAL GAMES MARKET REPORT



This report and accompanying data sets provide games market and gamer number forecasts per segment, on a global, regional, and local level along with an overview of key market trends. It also debuts our new Game Enthusiast Segmentation.

## DATA COVERAGE

The report includes different views on the games market to illustrate future growth potential reflected in our gamer and revenue forecast numbers.

### KEY METRICS GAMERS

- › Online population
- › Players across all segments
- › Players per segment
- › Paying gamers across all segments
- › Paying gamers per segment
- › Gamer demographics per segment

### KEY METRICS GAME REVENUES

- › Total game revenues
- › Revenues by segment
- › Revenues by genre (2018)
- › 2017-2021 CAGR per segment
- › Digital versus boxed revenues
- › Avg. revenue per paying gamer

## REPORT CONTENT SUMMARY

The report comprises of 115 pages of text, tables, and graphs on a global, regional, and country scale.

### GLOBAL GAMES MARKET

- › Revenues per region and segment | 2017-2021
- › Gamers per region and segment | 2017-2021
- › Digital vs. boxed revenue breakdown
- › Revenue share per genre | mobile, PC, and console

### KEY GLOBAL TRENDS

#### RANKINGS

- › Top 35 Public Game Companies by Game Revenue
- › Top 50 countries by Game Revenue

#### REGIONAL MARKET OVERVIEW

- › Revenues per segment | 2017-2021
- › Gamers per segment | 2017-2021

#### COUNTRY MARKET OVERVIEW

- › Revenues per segment | 2017-2021
- › Gamers per segment | 2017-2021
- › Demographics of gamers per segment

#### SPECIAL FOCUS TOPICS:

- › Game enthusiast segmentation
- › PC gaming and PC gaming hardware tracker
- › Mobile device intelligence

## DELIVERABLES

**ANNUAL REPORT**  
115 PAGES



**QUARTERLY UPDATES**  
-16 PAGES



**DASHBOARD**  
TABLEAU & XLS



CLIENT SUPPORT  
INCLUDED

## USE CASES

**UNDERSTAND MARKET MOVEMENTS**

*"Understanding the latest market movements and consumer trends allows us to stay ahead of competitors in the gaming peripheral space and size our target audience in a new way."*

**PRIORITIZE INTERNATIONAL ROLL-OUT**

*"We could easily pinpoint the fastest-growing markets for PC games in the Asia region, allowing us to focus our business development and marketing efforts there."*

**SET REALISTIC GROWTH TARGETS**

*"We were launching a new mobile title in Latin America and were able to set realistic short- and long-term targets for our specific genre in terms of consumer engagement and revenues."*

**OPTIMIZE LOCAL MARKETING SPEND**

*"In certain countries, the average spend per paying console gamer is several factors higher than others, so we decided to focus our marketing efforts on these markets to improve ROI."*



## GEOGRAPHIC SCOPE

The report provides a global overview as well as insights into individual regions and 28 countries. Key metrics are also presented for the top 50 countries by game revenues.



## DEFINITIONS

- **GAME REVENUES:** Consumer revenues generated by companies in the global games industry, excluding hardware sales, tax, business-to-business services, and online gambling and betting revenues.
- **GAMERS/PLAYERS:** All people that have played games on a PC, console or mobile device in the past six months.
- **BROWSER PC GAMES:** PC games that can be played in an internet browser on casual game websites or social networks (e.g. Kongregate, Miniclip or Facebook).
- **DOWNLOADED/BOXED PC GAMES:** PC games that can be downloaded from websites or services such as Steam or purchased as a boxed product (CD/DVD) (e.g. Call of Duty, Grand Theft Auto, Overwatch, Battlefield, World of Warcraft or League of Legends).
- **SMARTPHONE GAMES:** Games played on mobile (smart)phones.
- **TABLET GAMES:** Games played on an iPad or any other tablet (excl. handheld consoles).
- **CONSOLE GAMES:** Games played on a console device either on the TV screen directly or through a console such as Xbox, PlayStation, Wii and Ouya, or Games on a Nintendo Switch, (3)DS(i), PSP and PS Vita as well as older handheld consoles.

## METHODOLOGY

### 1. PRIMARY RESEARCH & DATA FEEDS

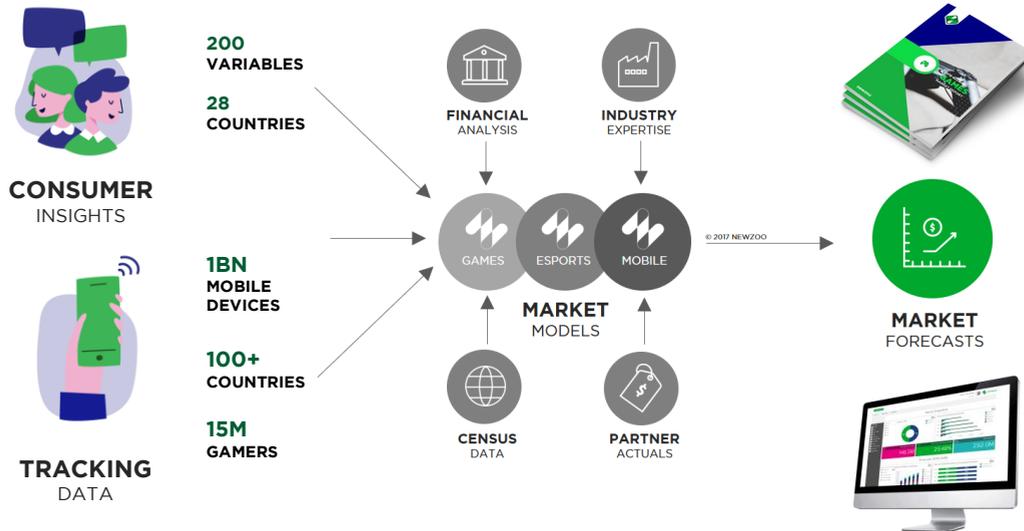
Newzoo performs primary consumer research in 28 countries covering over 50,000 consumers and tracks the daily behavior of gamers through our variety of partners.

### 2. MODELING & MARKET ANALYSIS

All data is fed into Newzoo's market models and combined with financial analysis, census data, and actuals. Initial forecasts are validated with clients and partners.

### 3. TREND WATCHING & FORECASTING

Newzoo's market analysts are always on the lookout for new industry and consumer trends shaping the future of a mobile-first world. These are combined with our forecast figures.



## RELATED SUBSCRIPTIONS

### 1. GAMES CONSUMER RESEARCH

(BI-)ANNUAL UPDATE, ONLINE ANALYSIS TOOL

### 2. GAME FRANCHISE RESEARCH

(BI-)ANNUAL UPDATE, ONLINE ANALYSIS TOOL

### 3. PC GAME TRACKER

MONTHLY DATA, TABLEAU DASHBOARD

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