



# PC & Console Gaming

## 2023



# Today's Agenda

- 1 Presentation: 30 mins
- 2 Questions: 5 mins



**Tyler Long**



Business Development



Producer



CEO &  
Co-founder



Head of Product

# The PC & console market in 2023

What's happening in the games market now and what's to come

## 2022 – A Year of Correction

- Last year we saw the games market face its first downturn in over a decade.
- These **trends constitute a correction towards pre-COVID engagement.**
- We predict an upward trend in the number of players and how much they spend, especially given that we're above pre-COVID engagement levels.

## 2023 – A Battle for Attention, Retention, & Monetization

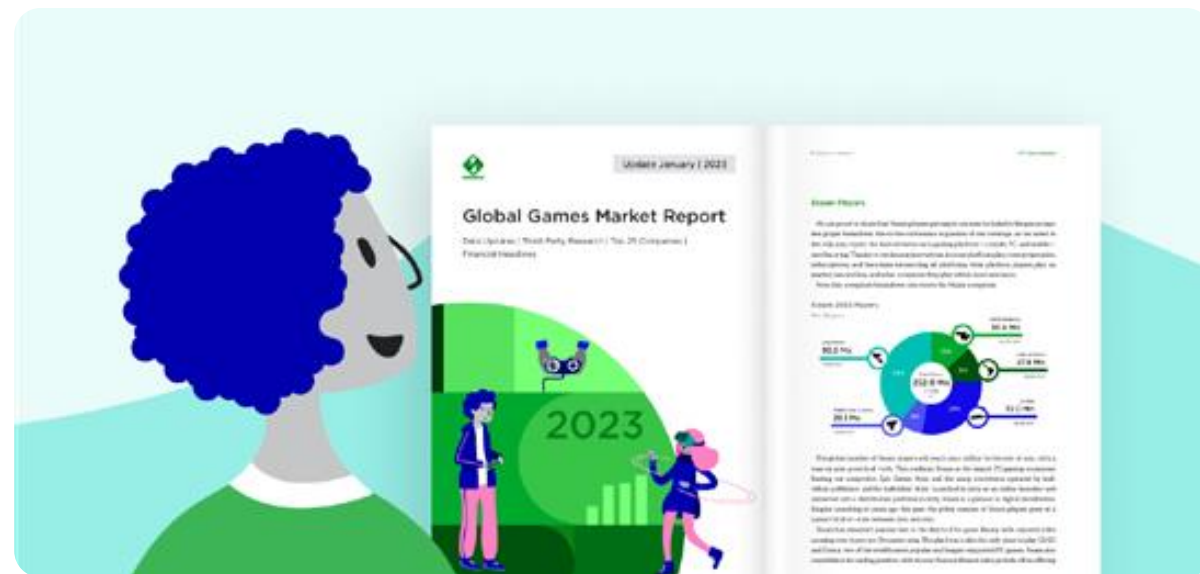
- The battle for attention is heating up, elevating ambitions to expand the definition of engagement.
- The **metaverse, transmedia, cross-platform, remasters, and more, all of which ensure players stay connected to an IP, company, and/or platform.**
- Subscription services, remasters and remakes, IP licensing, and microtransactions boost profits and mitigate risks.



# Breaking Down The PC & Console Market in 2023

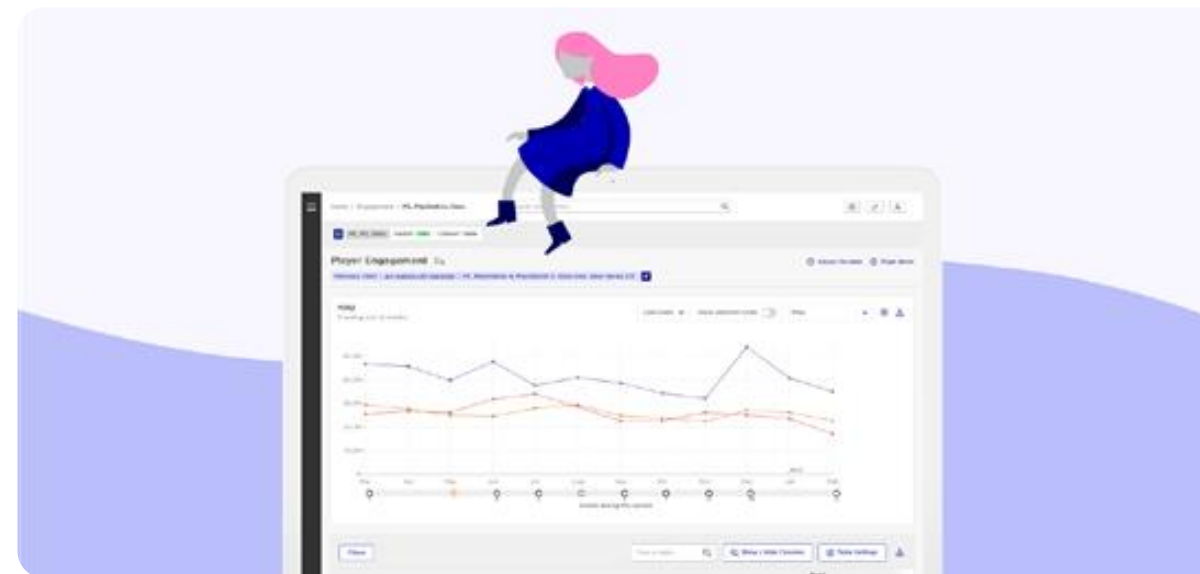
Three Products & Three Angles to Understand the Overall PC & Console Landscape

## 1. Know the Market



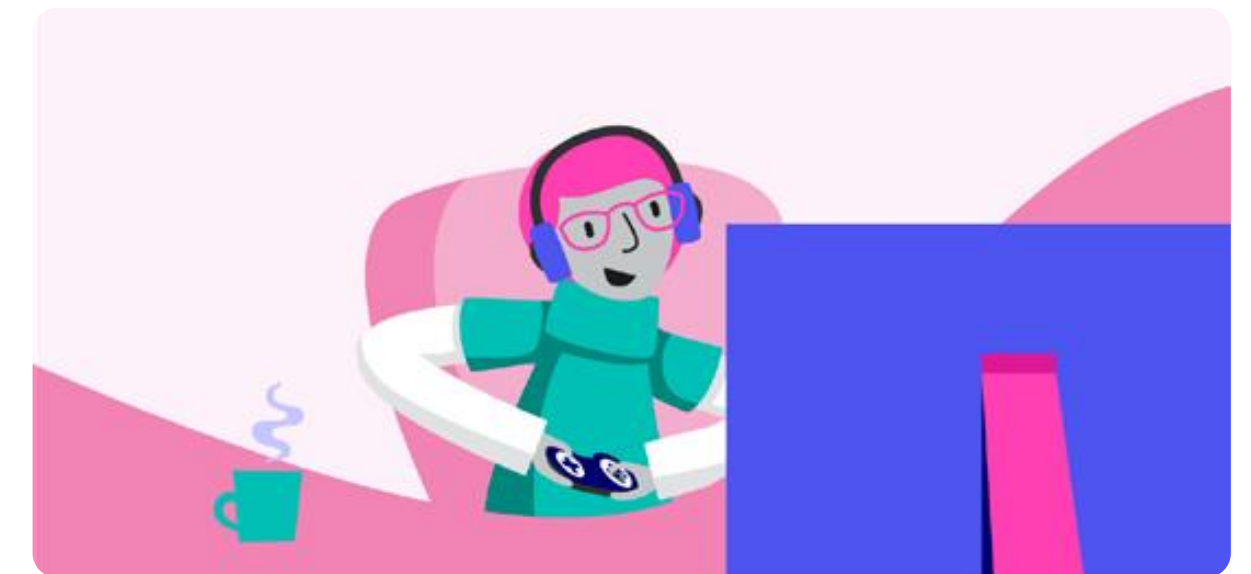
From the [Games Market Reports & Forecasts](#)

## 2. Know the Games



From the [Game Performance Monitor](#)

## 3. Know the Gamers

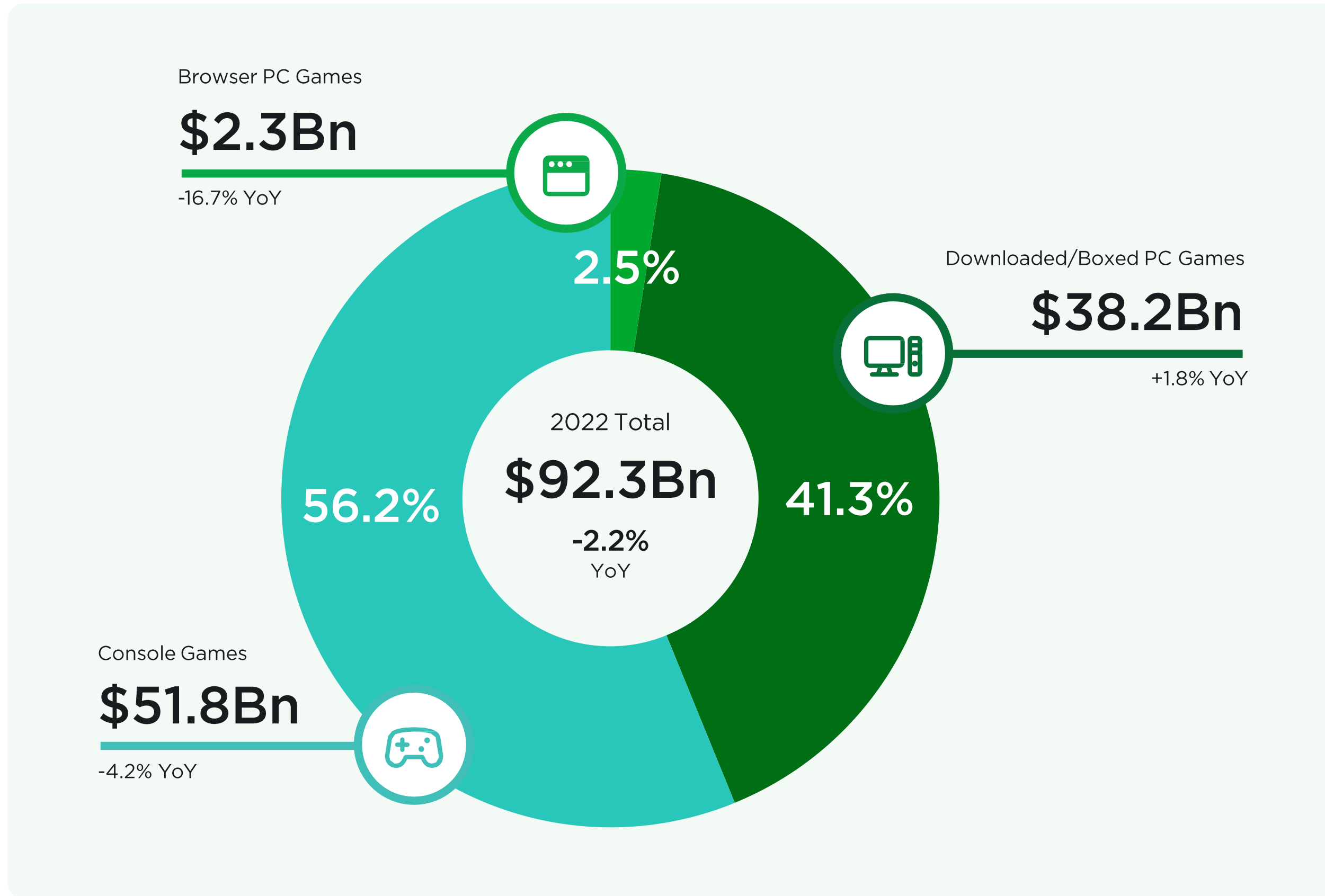


From the [Global Gamer Study](#)

# Know the Games Market

Understand the market with Newzoo's key data, forecasts, and insights

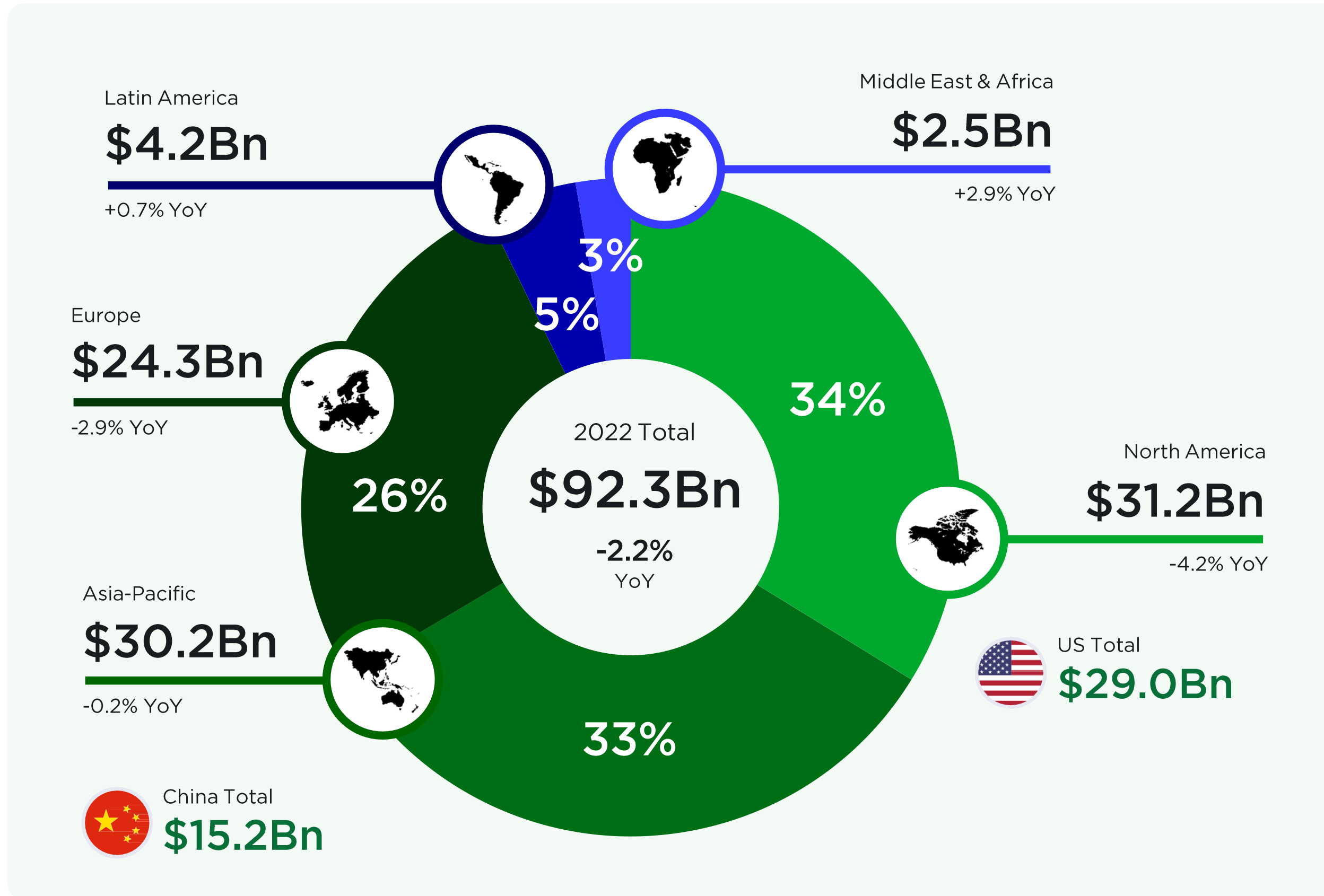
# The PC & Console Global Games Market Revenue in 2022



## \$92.3Bn

PC/Console game revenues in 2022 account for 50% of the global market

# The PC & Console Global Games Revenues Per Region in 2022



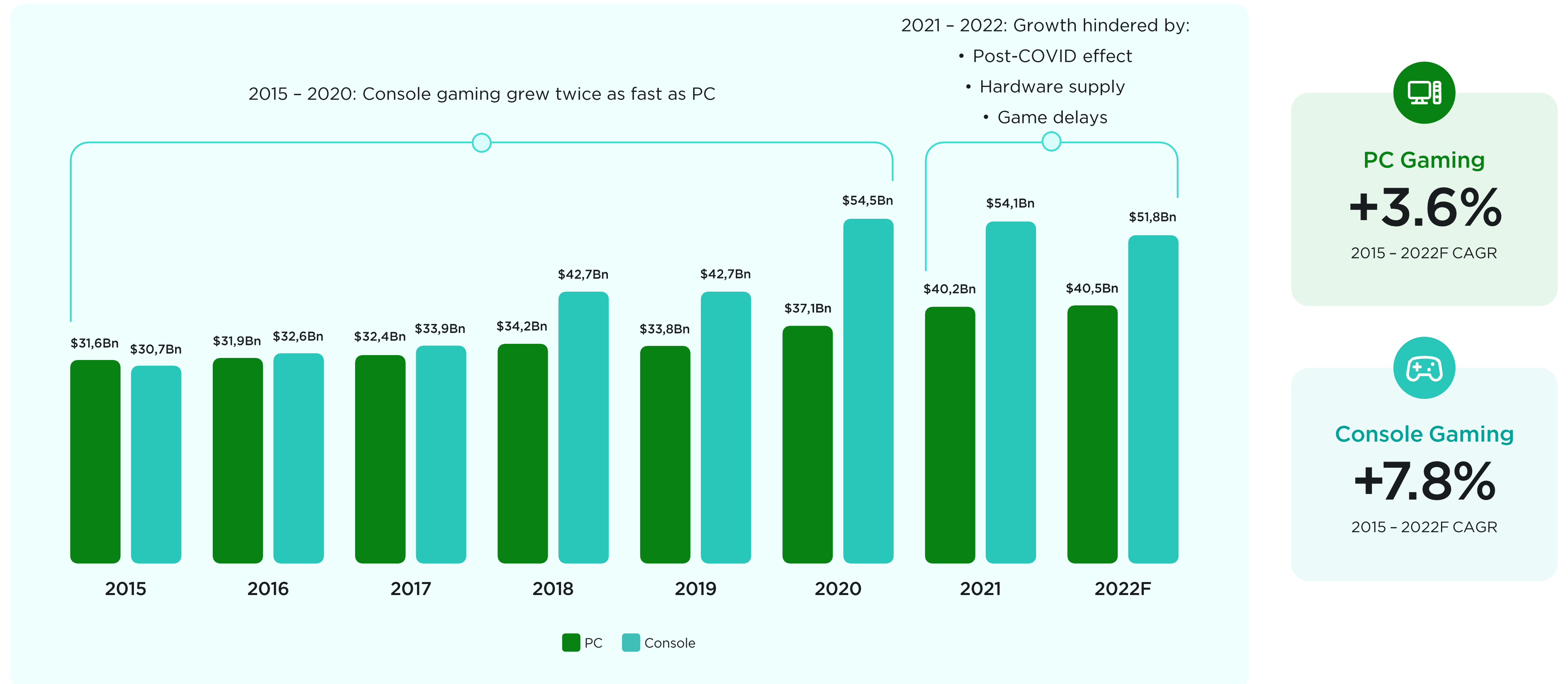
**48%**

US & China markets' percent of the PC & console global revenue



# 2015 - 2022 PC & Console Global Games Growth

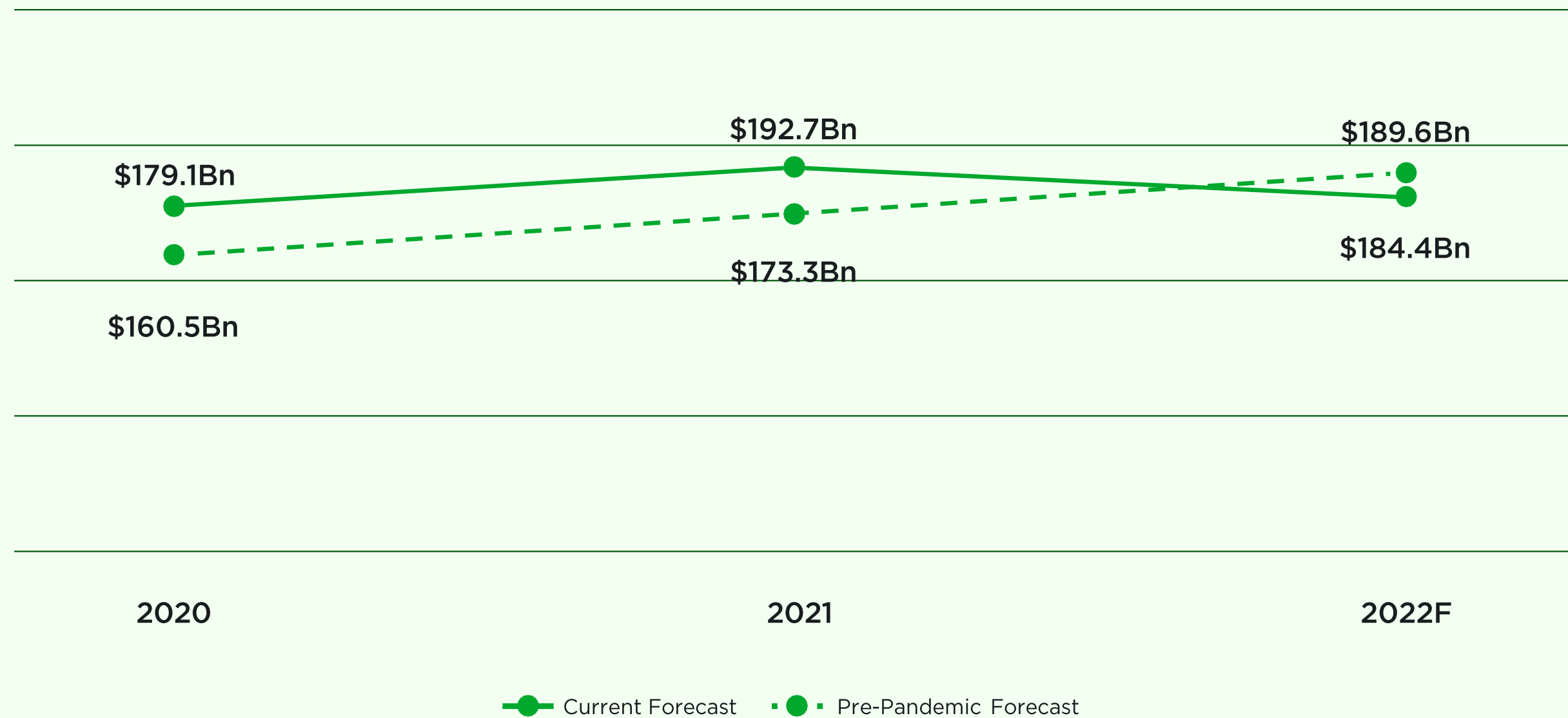
2022 was a corrective year for the games market, following an intense growth period during the global pandemic



# The market significantly outperformed our expectations from 2020 to 2022

## Global Games Market Revenues

2020-2022 | Pre-Pandemic\* vs. Current Forecast






\* 2022 was the last year in our January 2020 forecast

# \$32Bn


The games market outperformed pre-COVID expectations by over \$32 billion over a 3-year period

# Newzoo's Games Market Reports and Forecasts

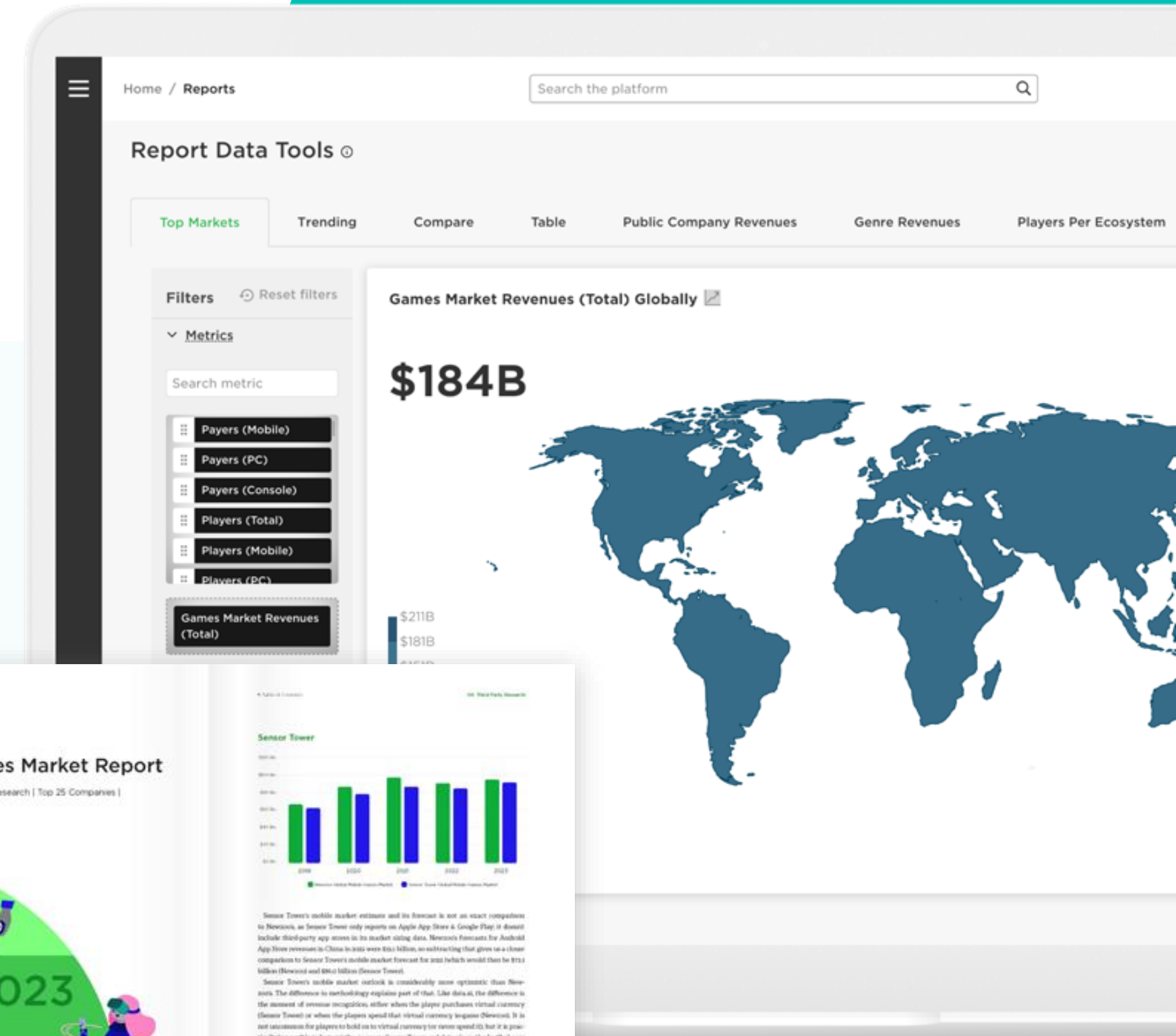
Access the most trusted and quoted games market sizing data, forecasts, and trends on a global, regional, and local level.

-  **Understand**  
Market Movements
-  **Prioritize**  
International Roll-Out
-  **Set**  
Realistic Growth Targets

## Includes:

- ✓ The Global Games Market Report, a 165-page PDF that analyzes the latest trends, developments, and games market forecasts.
- ✓ **Personal User Licenses**  
Personal access to your subscription in one place
- ✓ Access the report, quarterly updates, key metrics, and many more unique insights through our Newzoo Platform.
- ✓  Accompanying Excel dataset with granular data breakdown

[Learn more](#)



# Know the Games

Diving deeper into games-level performance and trends

# Playtime is leveling out for PC & console platforms as lockdowns end

Post-COVID playtime numbers are dropping, returning to a familiar level as gamers play fewer titles and game less overall

Avg. Hours Played Per Player in Year - 2021 vs 2022



**-37%**

Players who played over 1000 hours in the year has decreased 37% YoY from 2021 to 2022

# Fortnite topped the MAU charts for nearly every platform in 2022

Top performers on PC & console - US only



## US - Top 10 Games by Average MAU in 2022 Per Platform

PC		Xbox		PS		Switch	
1	ROBLOX	1	Fortnite	1	Fortnite	1	Pokémon Scarlet/Violet
2	Call of Duty Modern Warfare II/ Warzone 2.0	2	Call of Duty Modern Warfare II/ Warzone 2.0	2	Call of Duty Modern Warfare II/ Warzone 2.0	2	Fortnite
3	Fortnite	3	Grand Theft Auto V	3	Grand Theft Auto V	3	Fall Guys
4	Minecraft	4	Minecraft	4	Call of Duty Modern Warfare/Warzone	4	Mario Kart 8
5	Apex Legends	5	Call of Duty Modern Warfare/Warzone	5	Apex Legends	5	Minecraft
6	Call of Duty Modern Warfare/Warzone	6	High on Life	6	NBA 2K23	6	Pokémon Legends: Arceus
7	The Sims 4	7	ROBLOX	7	NBA 2K22	7	Rocket League
8	Overwatch 1 & 2	8	Apex Legends	8	God of War: Ragnarok	8	Animal Crossing: New Horizons
9	Valorant	9	Fall Guys	9	Minecraft	9	Nintendo Switch Sports
10	Counter-Strike: Global Offensive	10	NBA 2K22	10	Call of Duty: Black Ops Cold War	10	Splatoon 3

# Classic PC games outperformed newer titles in 2022

## Avg. MAU 2022 – PC Only

Rank	Game	Platforms	Release Date
1	ROBLOX	Roblox	2006
2	Minecraft	Minecraft	2011
3	Fortnite	EGS	2017
4	The Sims 4	Origin, Steam, EGS	2014
5	Call of Duty: Modern Warfare II/Warzone 2.0	Steam, Battlenet	2022
6	League of Legends	Riot	2009
7	Counter-Strike: Global Offensive	Steam	2012
8	Valorant	Riot	2020
9	Grand Theft Auto V	Steam, EGS, Rockstar	2013
10	Call of Duty: Modern Warfare/Warzone	Battlenet	2019
11	Overwatch 1 & 2	Battlenet	2016
12	Apex Legends	Steam, Origin	2019
13	Rocket League	EGS	2015
14	Fall Guys	EGS	2020
15	Destiny 2	Steam, EGS	2017
16	Tom Clancy's Rainbow Six: Siege	Steam, EGS, Uplay	2015
17	Cyberpunk 2077	Steam, EGS	2020
18	Genshin Impact	EGS, Hoyoverse	2020
19	Dota 2	Steam	2013
20	World of Warcraft	Battlenet	2004

## Release Dates of Top 20 Titles:

- ➔ Only one title launched in 2022
- ➔ Half of the titles launched in 2015 or earlier
- ➔ Three of the titles came out before 2010

# Top PC & Console Game Releases in 2022 – US Only

 US - Top 2022 releases based on the first three months of revenue



January

ELDEN RING

February



March



April



May



June



July



August



September



October



November



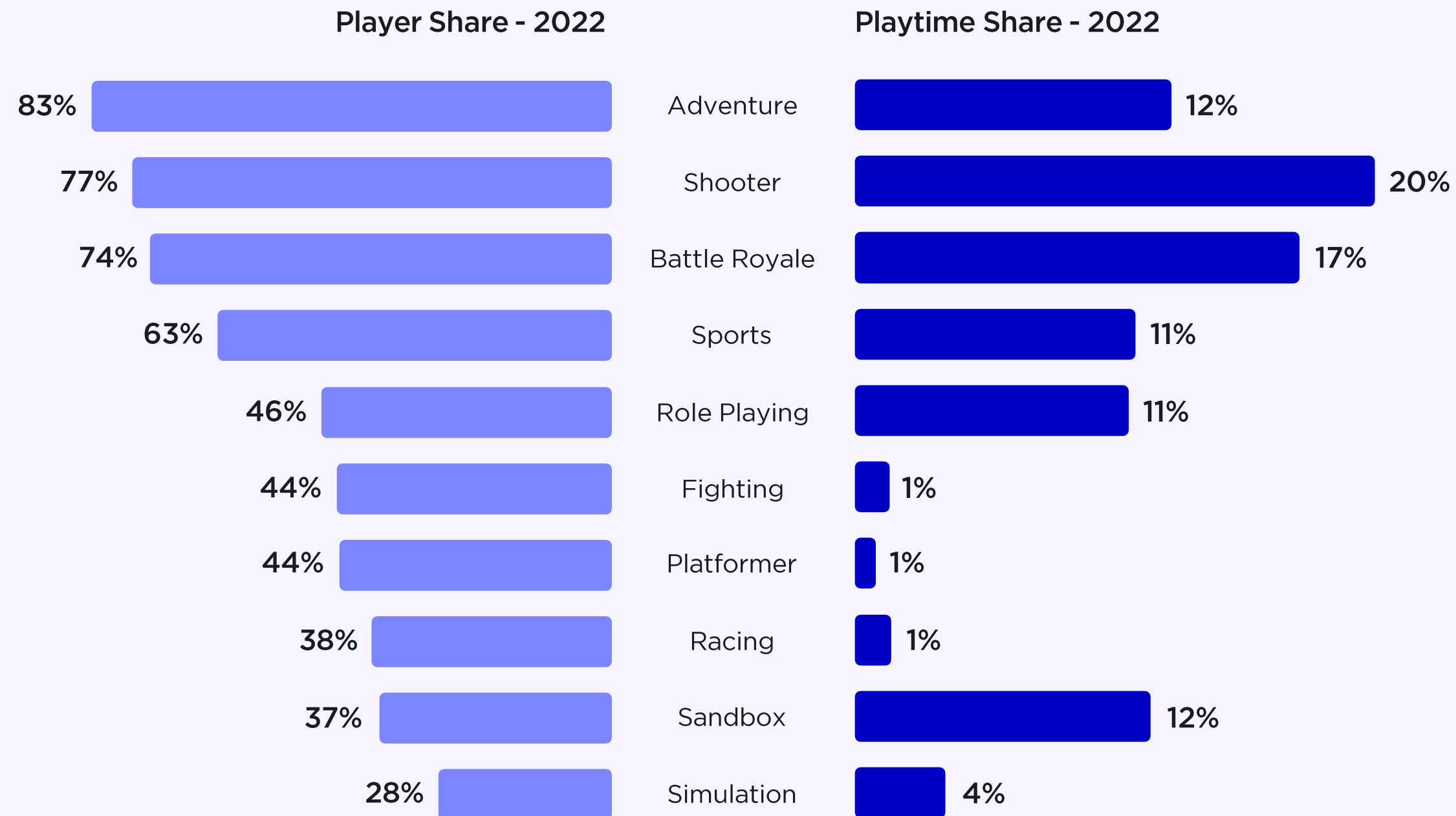
December

Top performing releases were mixed revenue model games including NBA 2K23 and Call of Duty: Modern Warfare II



# Player Share & Playtime of Top PC & Console Genres in 2022

## Top 10 Genres by Yearly Player Share



83%

PC & Console players played an Adventure title

37%

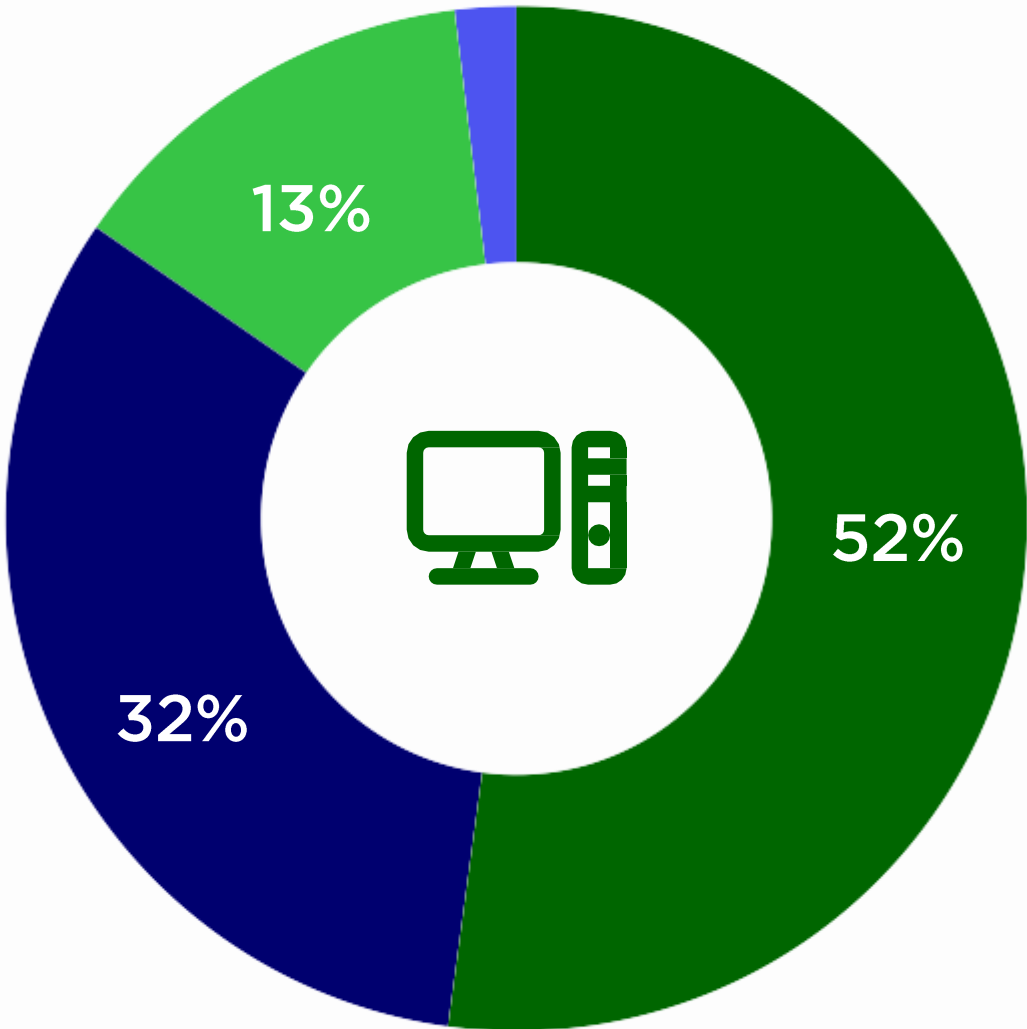
Of all playtime was in Shooter/Battle Royale games

3%

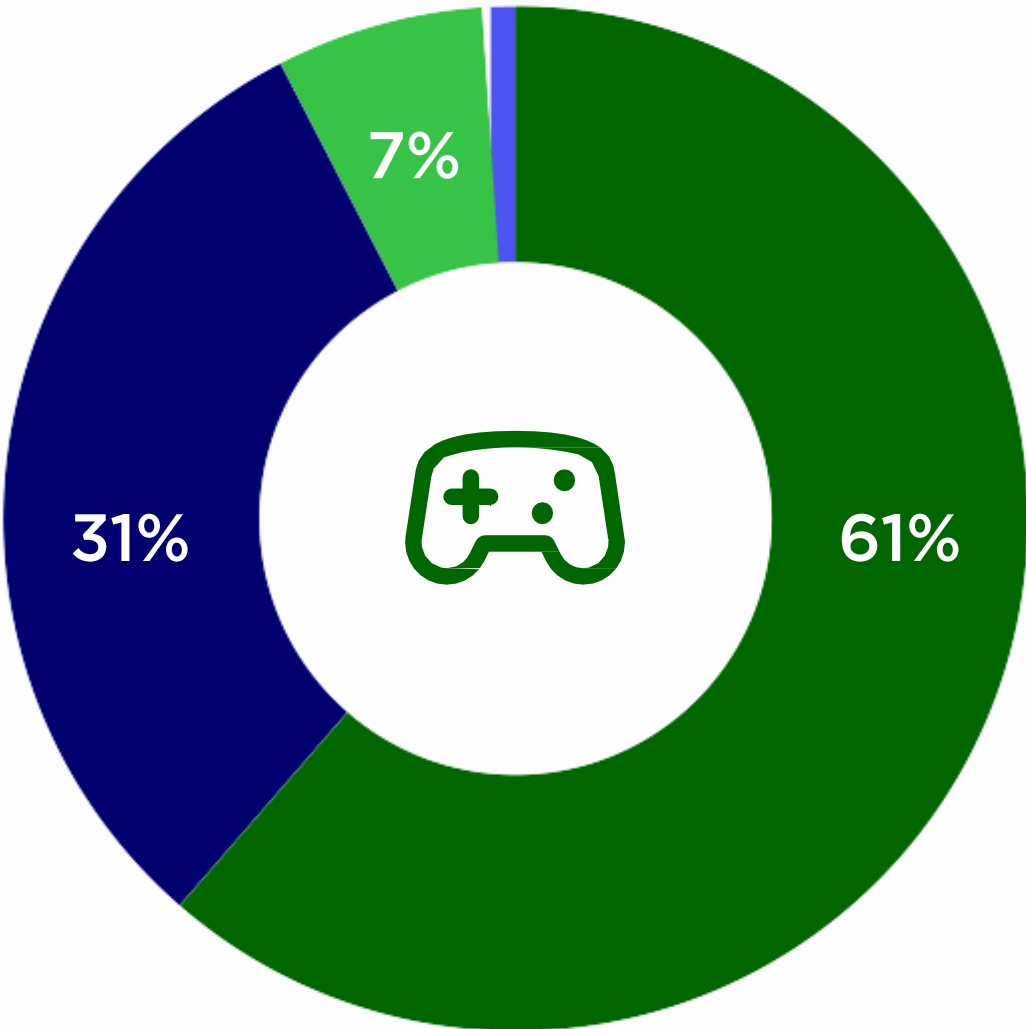
of all playtime was in Fighting, Platformer and Racing games

# US Market PC & Console Spending per Category in 2022

Share of yearly PC revenue by category - US 2022



Share of yearly console revenue by category - US 2022



■ Full Game Download ■ Downloadable Content ■ Microtransaction ■ Subscription

>50%

PC & Console premium revenue still makes up over 50% of total revenue

# US Top 10 Games by Premium & In-game Revenue in 2022

Charts dominated by titles that are long-standing franchises with mixed monetization models



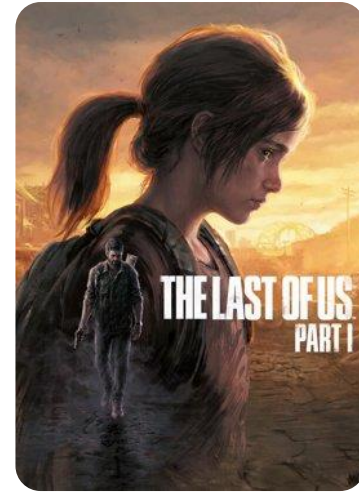
## Premium Revenue - US Top 10

1	Call of Duty: Modern Warfare II/Warzone 2.0
2	<a href="#">NBA 2K23</a>
3	<a href="#">Elden Ring</a>
4	God of War: Ragnarok
5	Pokémon Scarlet/Violet
6	Dying Light 2
7	Madden NFL 23
8	LEGO Star Wars: The Skywalker Saga
9	Tiny Tina's Wonderlands
10	Pokémon Legends: Arceus

## In-Game Revenue - US Top 10

1	Fortnite
2	NBA 2K22
3	Apex Legends
4	ROBLOX
5	Valorant
6	Destiny 2
7	NBA 2K23
8	Grand Theft Auto V
9	League of Legends
10	Call of Duty: Modern Warfare/Warzone

# The Last of Us transmedia strategy heavily influenced MAU and revenue



The Last of Us Part I  
2022

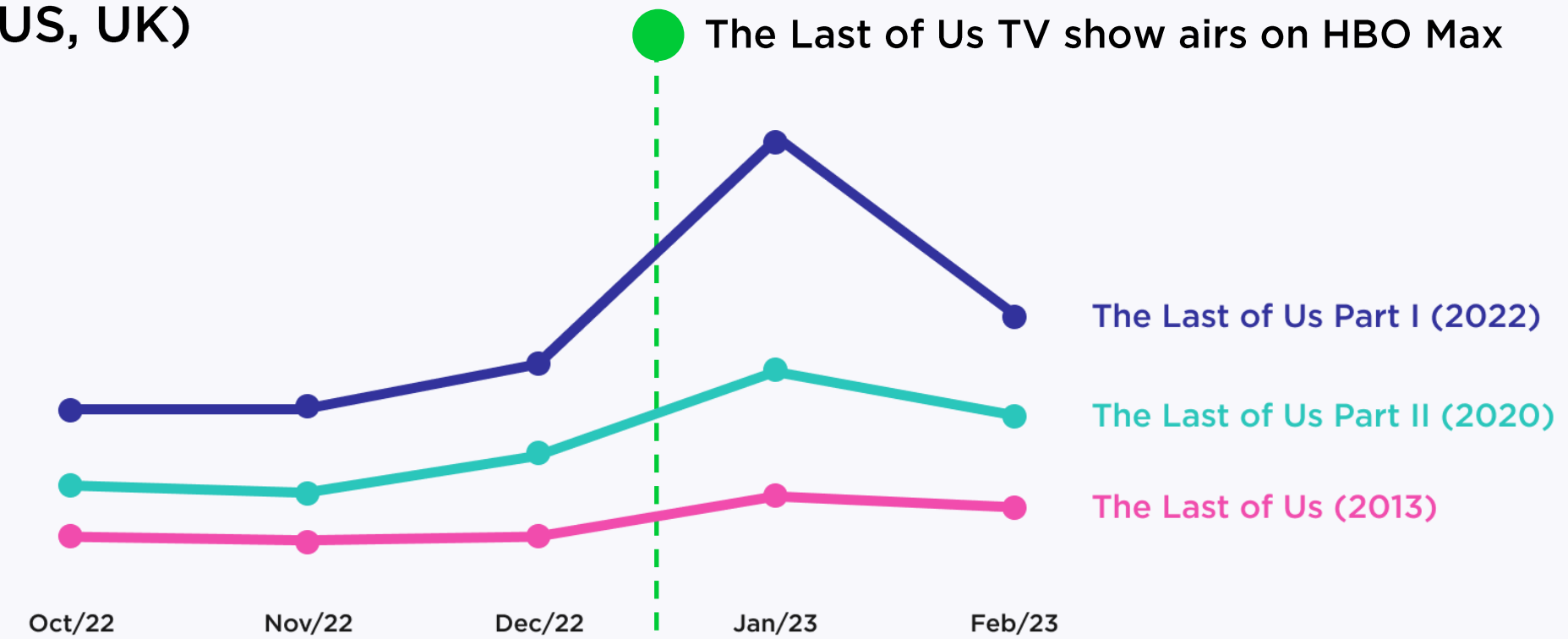


The Last of Us  
2013

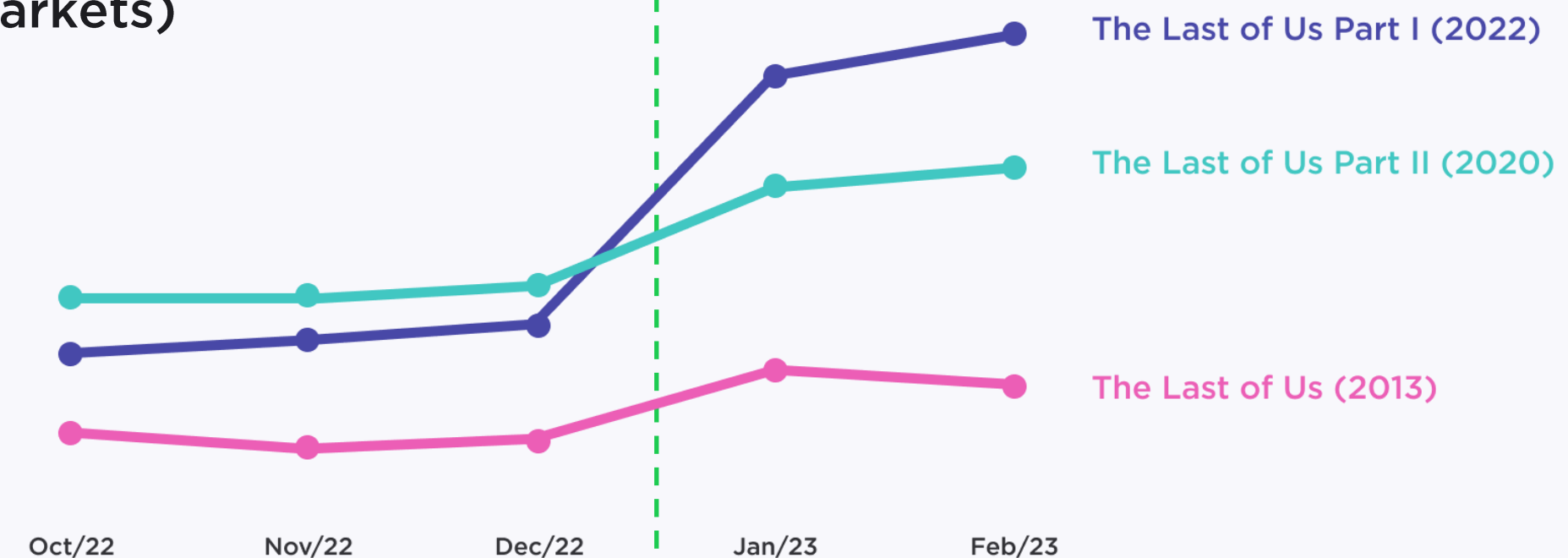


The Last of Us Part II  
2020

## Revenues (US, UK)



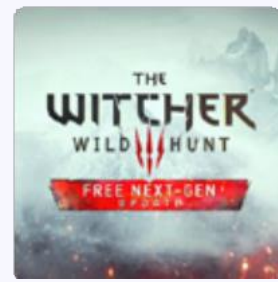
## MAU (37 markets)



# Remakes and remasters drove engagement for older IP



The Witcher 3:  
Wild Hunt



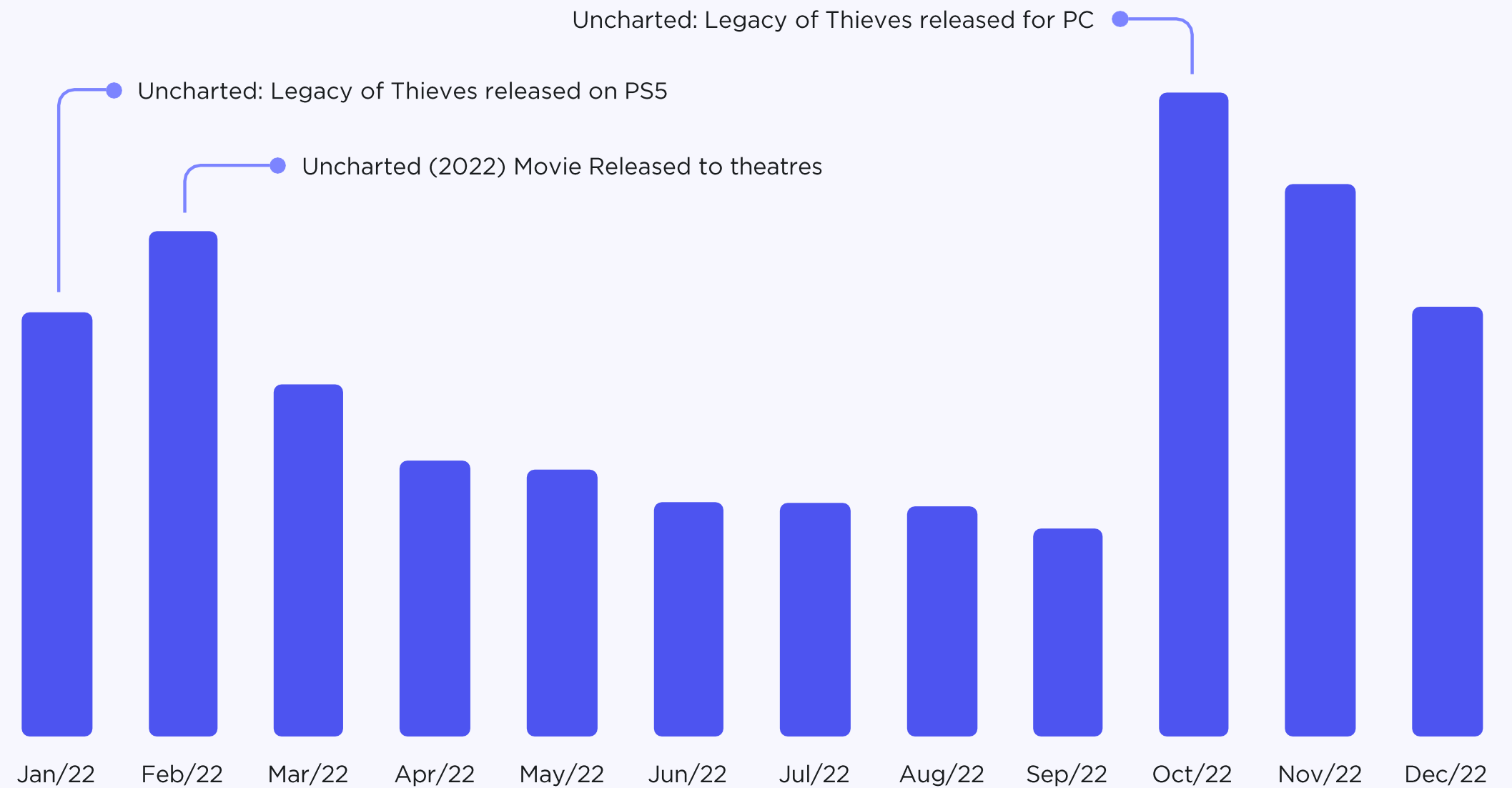
Free Next-Gen Update for  
PS5 & Xbox Series X

**+265%**

MoM MAU growth rate for  
The Wither 3: Wild Hunt from  
November to December 2022.

## Event performance by MAU Uncharted: A Thief's End & Uncharted: Legacy of Thieves

PlayStation 4 & 5 | 37 Major Markets | Aug 2021 - Aug 2022



# Newzoo's Game Performance Monitor

Unlock the leading platform for tracking the engagement and revenue KPIs of PC and console games

 **10,000+**


Games tracked across PC, Xbox, PS, and Nintendo Switch

 **37**

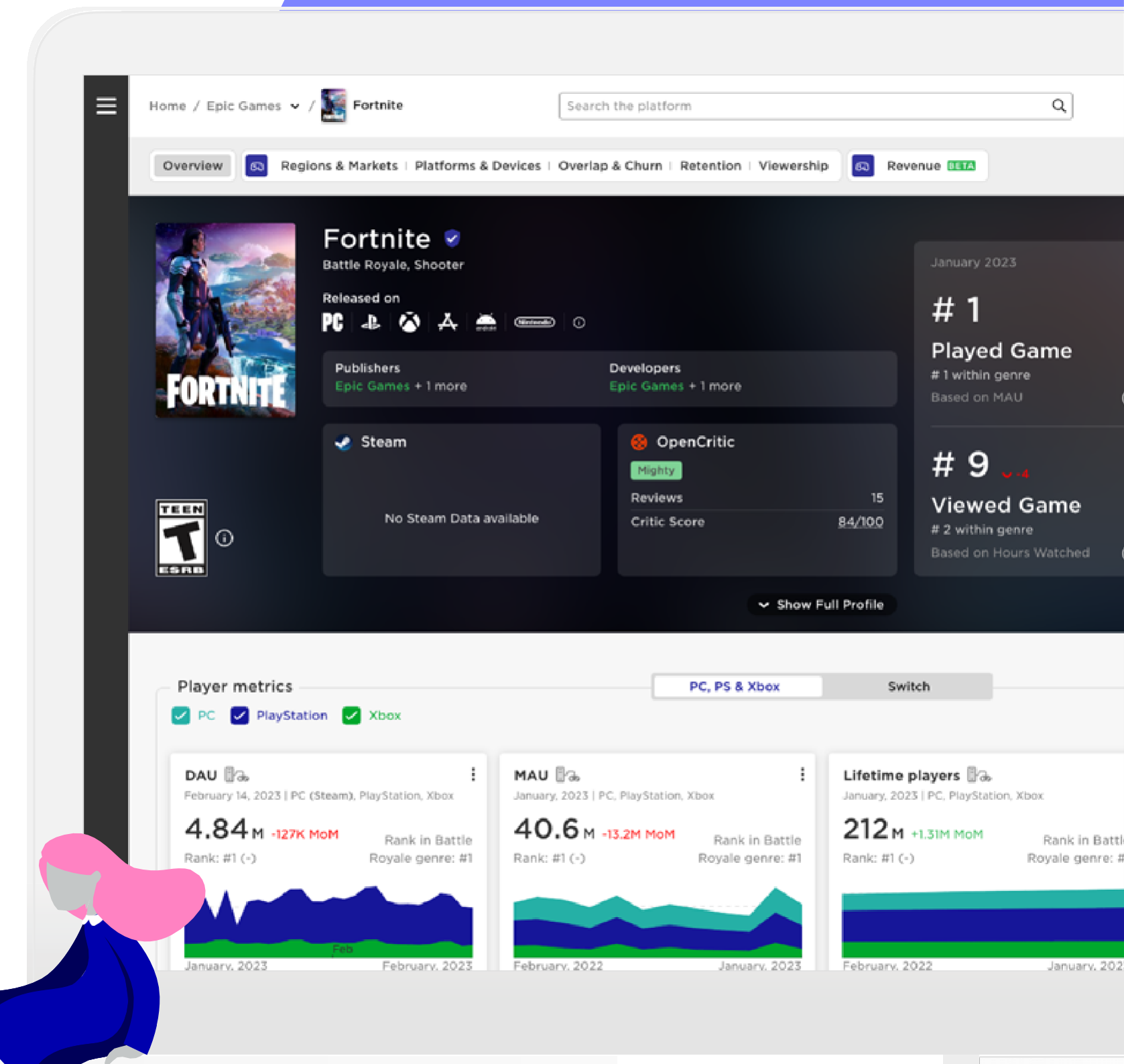
Global coverage with 37 markets, 8 regions

 **100+**

Metrics including MAU, DAU, Lifetime players, Revenue

- ✓ Coverage of the top platforms  

- ✓ Playing, spending, and viewing player data.
- ✓ Gamer Overlap, Retention, and Churn between titles
- ✓ Tracking millions of players' behavior per platform
- ✓ Revenue, ARPU for 1000+ PC & Console games in US and UK
- ✓ Steam Wishlists and Reviews
- ✓ Easy-to-use dashboard & API access

[Learn more](#)



# Know the Gamers

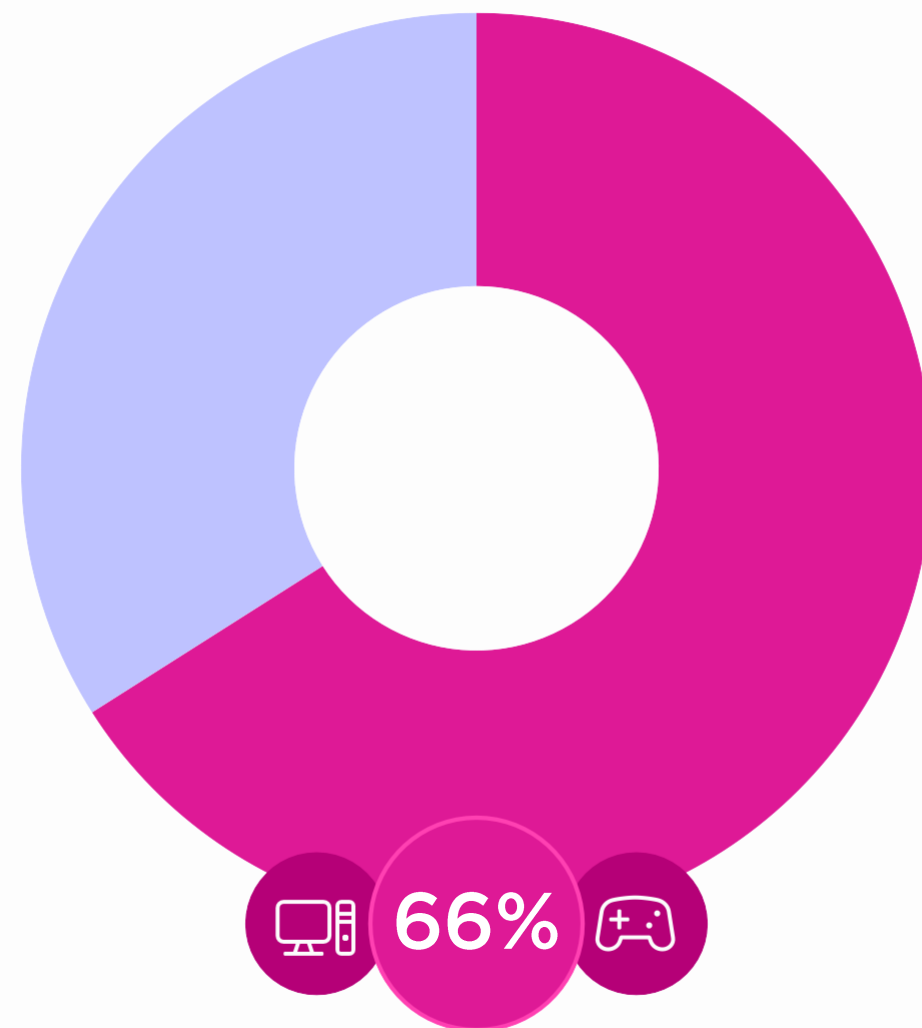
Digging into gamer demographics, personas, and how players are playing and spending

# 2/3 of gamers played on a PC and/or console over the past six months

Women and non-binary players now account for 40% of PC and/or console players

## Share of PC and/or console players (past 6 months)

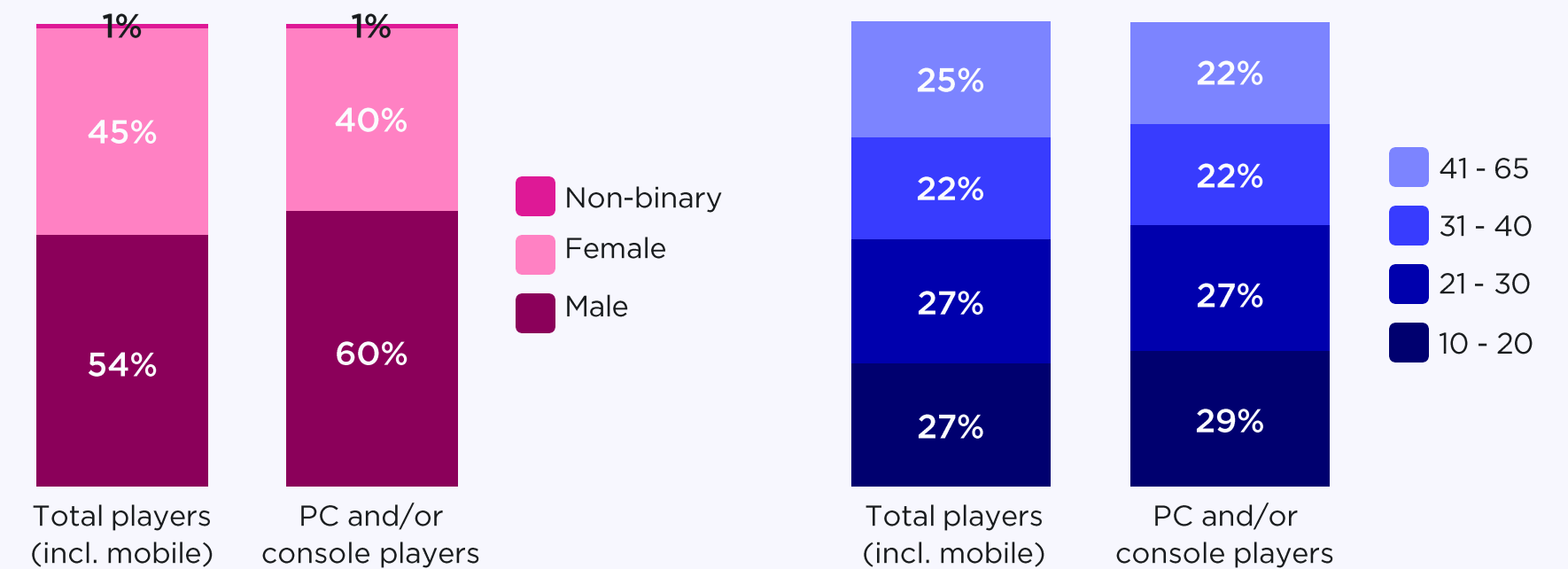
Base: Total players



66% of total players have played on a PC and/or console in the past 6 months

## Demographics comparison

Base: Total players; Total PC and/or console players








# 4 in 10 PC and/or console gamers are core gamers

## Level of identifying as a gamer

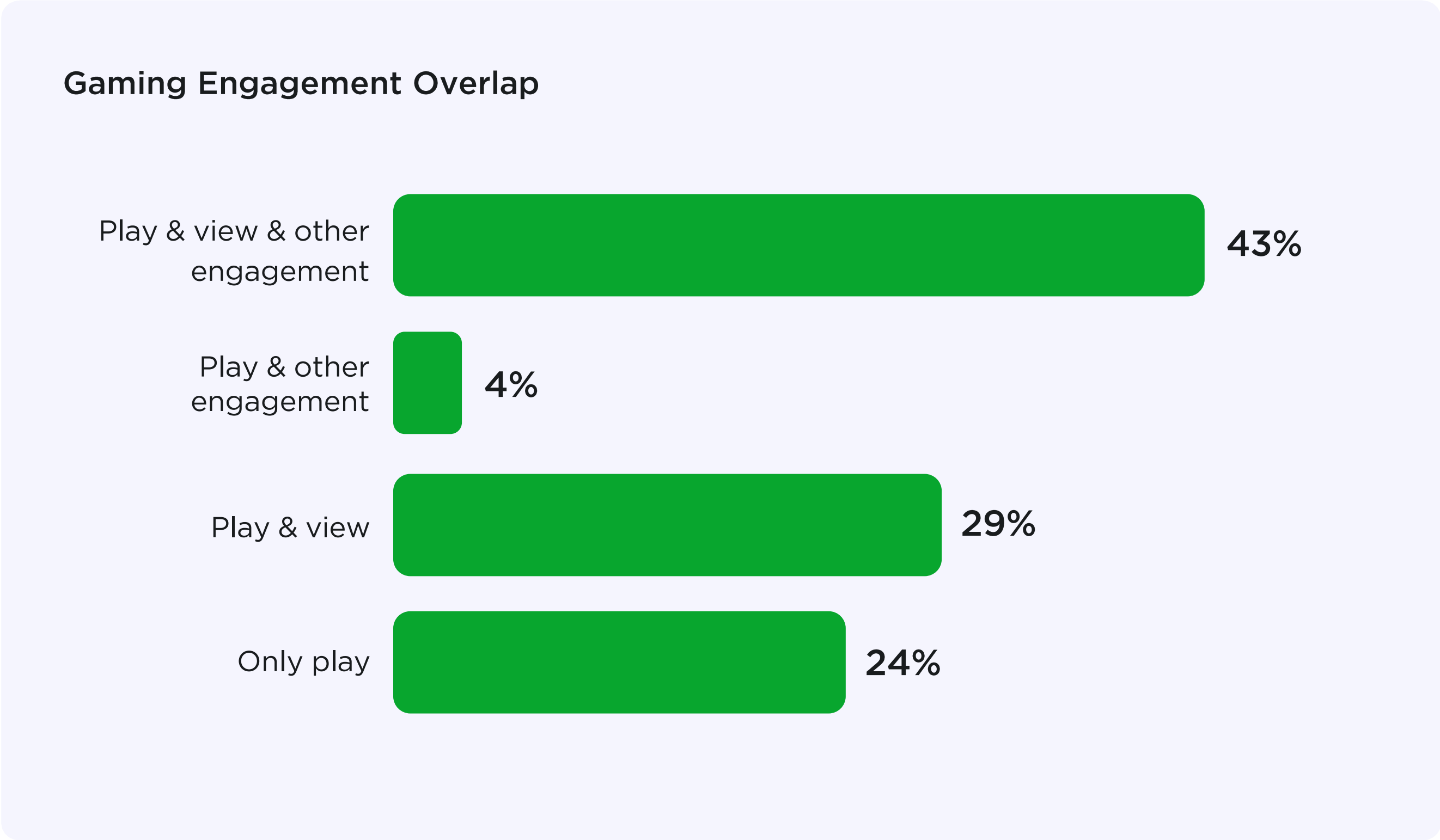
Base: Total PC and/or console players

	Casual Gamers	Midcore Gamers	Core Gamers
 % share	25%	35%	40%
 Play time per week	5h	7h	10h
 % that are payers	42%	66%	82%



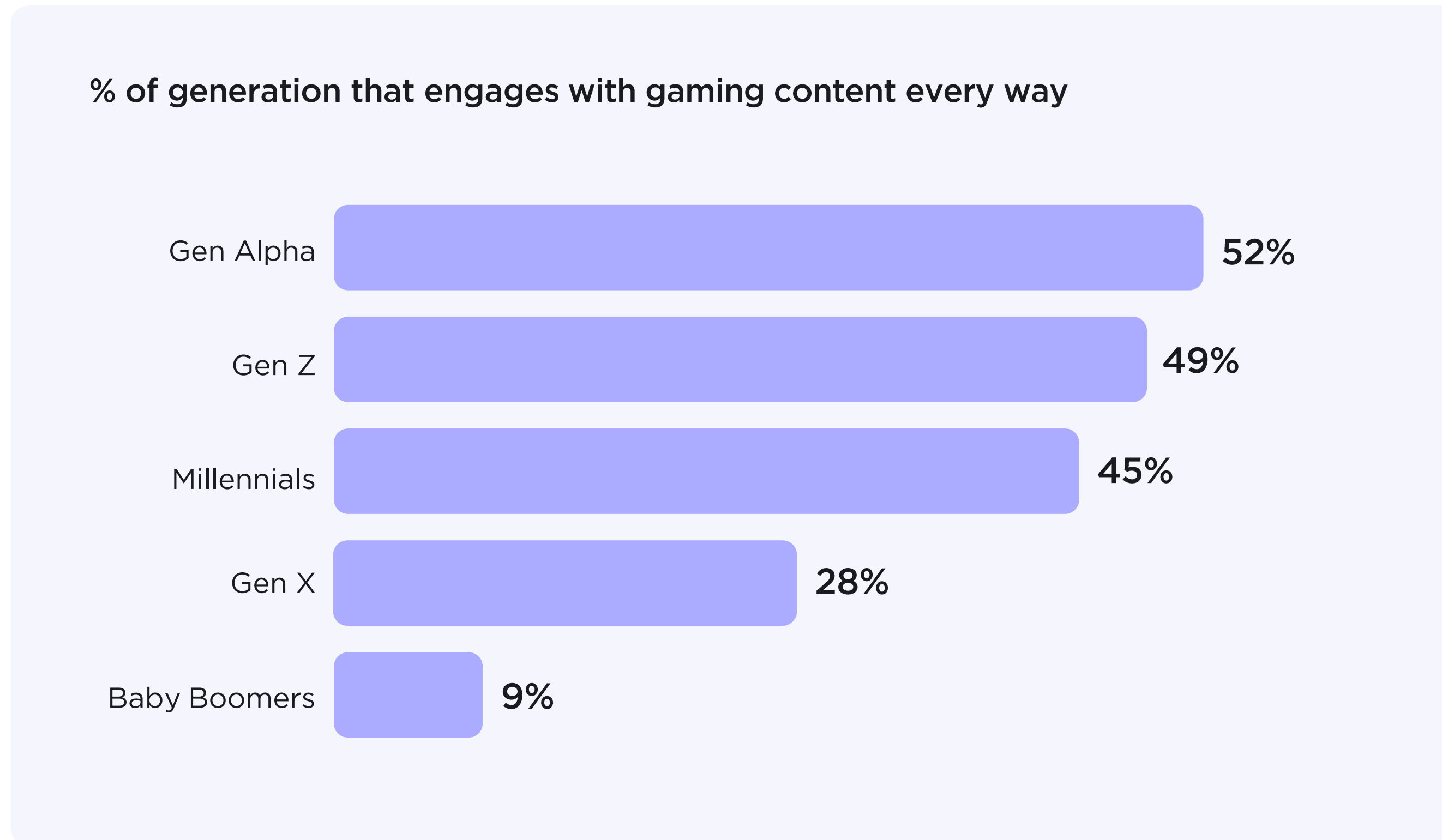
# Less than 25% of PC & console players engage by just playing

Base: Total PC and/or console players



# Younger players engage with gaming content in every way

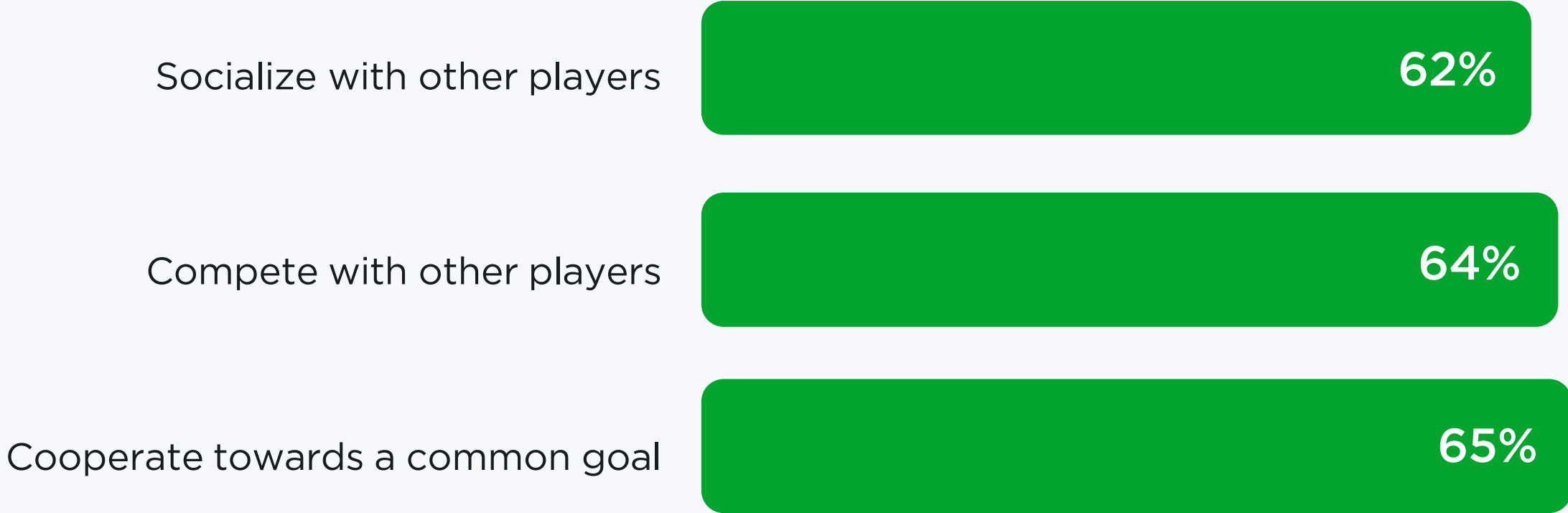
Base: Total PC and/or console players



# Gaming is increasingly becoming a platform for connection and socializing

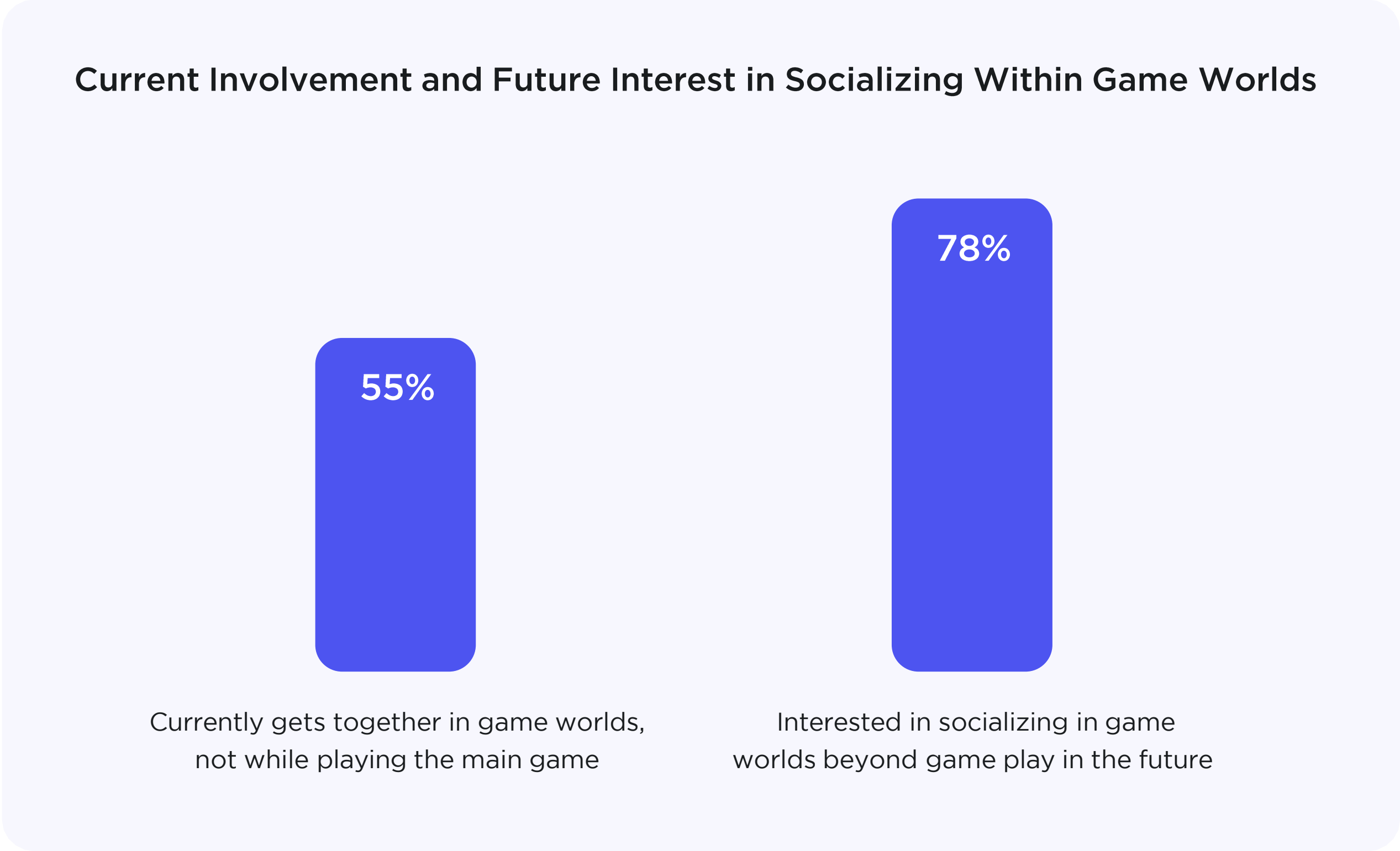
Base: Total PC and/or console players

## Importance of social features in games (% top 3 box out of 7)



# Gaming is increasingly becoming a platform for connection and socializing

Base: Total PC and/or console players

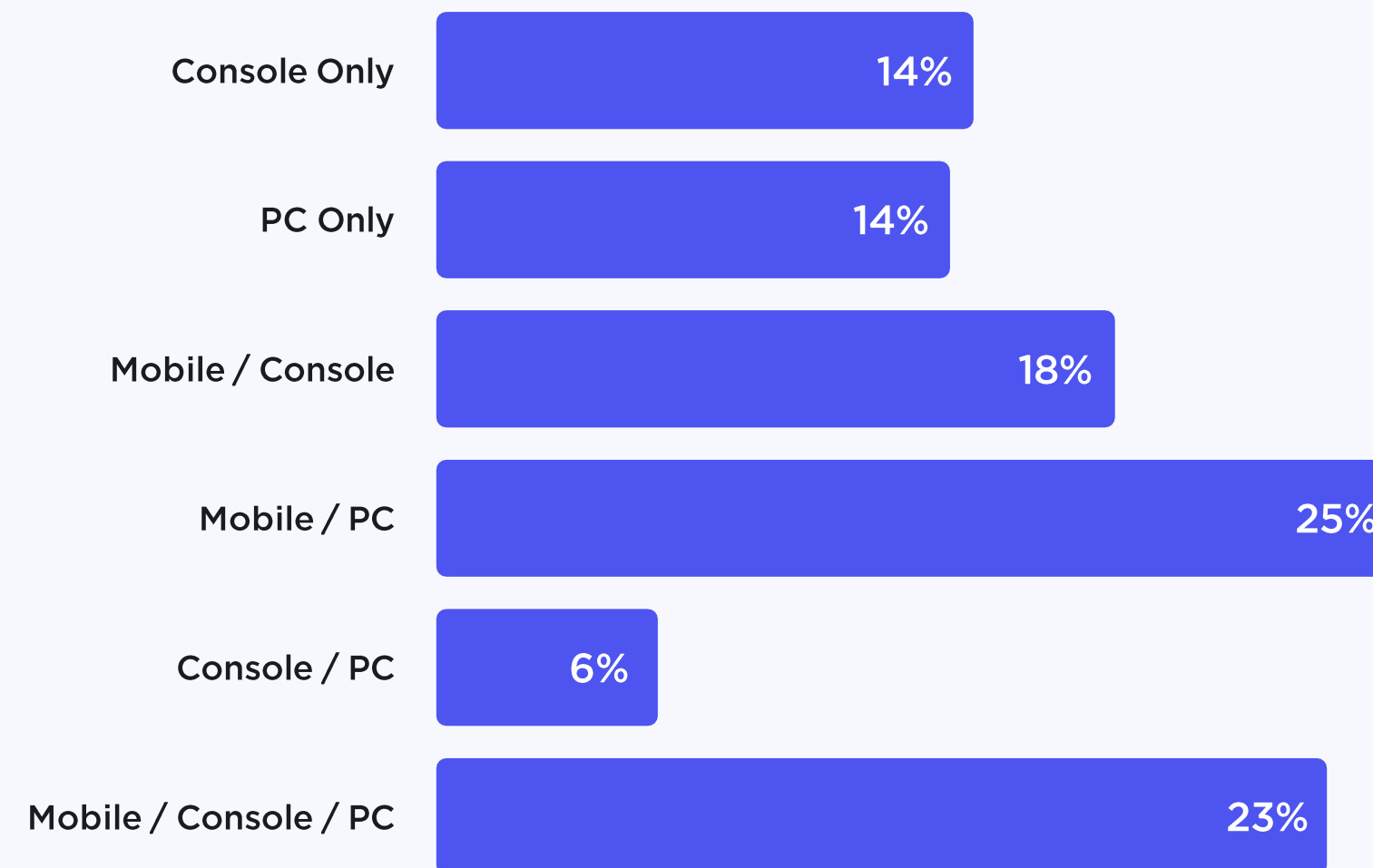


# Cross-platform play becoming more common among PC and/or console players

Nearly a quarter of PC and/or console players engage with all platforms (PC, console, mobile)

## PC and/or Console Platform Player Overlap\*

Base: Total PC and/or console players



**~70%**

PC and/or console players played on more than one platform in past 6 months

**23%**

PC and/or console players played on PC, console and mobile platforms in past 6 months

Source: [Newzoo Global Gamer Study 2022](#) (Global weighted average across 36 markets) | Q. Platforms played on in the past 6 months

Base: PC and/or Console players (n=42,514) | \*Please note, this excludes mobile-only players.

# Newzoo's Global Gamer Study

Access the most comprehensive global consumer research covering the gaming landscape and gaming audiences.

 **75,000+**  
Consumers surveyed  
yearly

 **36**  
Global coverage  
with 36 markets

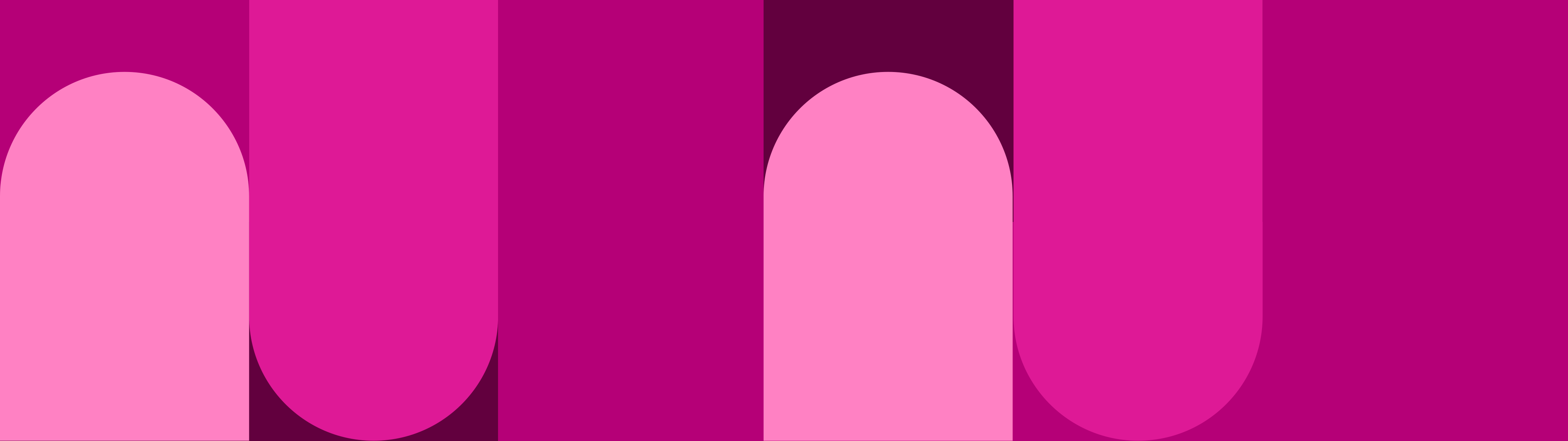
 **200+**  
Variables  
Tracked

## Includes:

- ✓ Gaming behavior across all platforms / dimensions
- ✓ Playing and viewing motivations & attitudes
- ✓ Spending behavior and motivations
- ✓ Media, lifestyle, and consumer brands consumption
- ✓ Easy-to-use consumer insights dashboard access

[Learn more](#)





# Looking forward to 2023 and beyond

Newzoo's outlook for this year in games, gamers, and the games market



# Games delayed in 2022 will make an impact in 2023

Many companies delayed their highly-anticipated titles from 2022 to this year and beyond

## Awareness of upcoming PC/console releases

Base: Pc and/or console players aged 10-50, U.S.

	awareness	purchase intent		awareness	purchase intent
Resident Evil 4 (2023)	50%	20%	Tekken 8	33%	12%
Marvel's Spider-Man 2	47%	18%	Dead Space (2023)	32%	12%
The Legend of Zelda: Tears of the Kingdom	43%	17%	Avatar: Frontiers of Pandora	32%	10%
Street Fighter 6	42%	15%	Kirby's Return to Dream Land Deluxe	31%	11%
Final Fantasy XVI	41%	14%	ARK 2	26%	9%
Hogwarts Legacy	40%	15%	Vampire: The Masquerade - Bloodlines 2	26%	9%
Star Wars Jedi: Survivor	39%	14%	Starfield	26%	9%
Diablo IV	37%	13%	Horizon Call of the Mountain	23%	9%
Final Fantasy VII Rebirth	36%	13%	Redfall	23%	8%
Suicide Squad: Kill The Justice League	35%	13%	Fire Emblem Engage	22%	9%
Dead Island 2	33%	12%	Baldur's Gate 3	22%	12%

Source: [Newzoo Game Health Tracker](#) (January data)

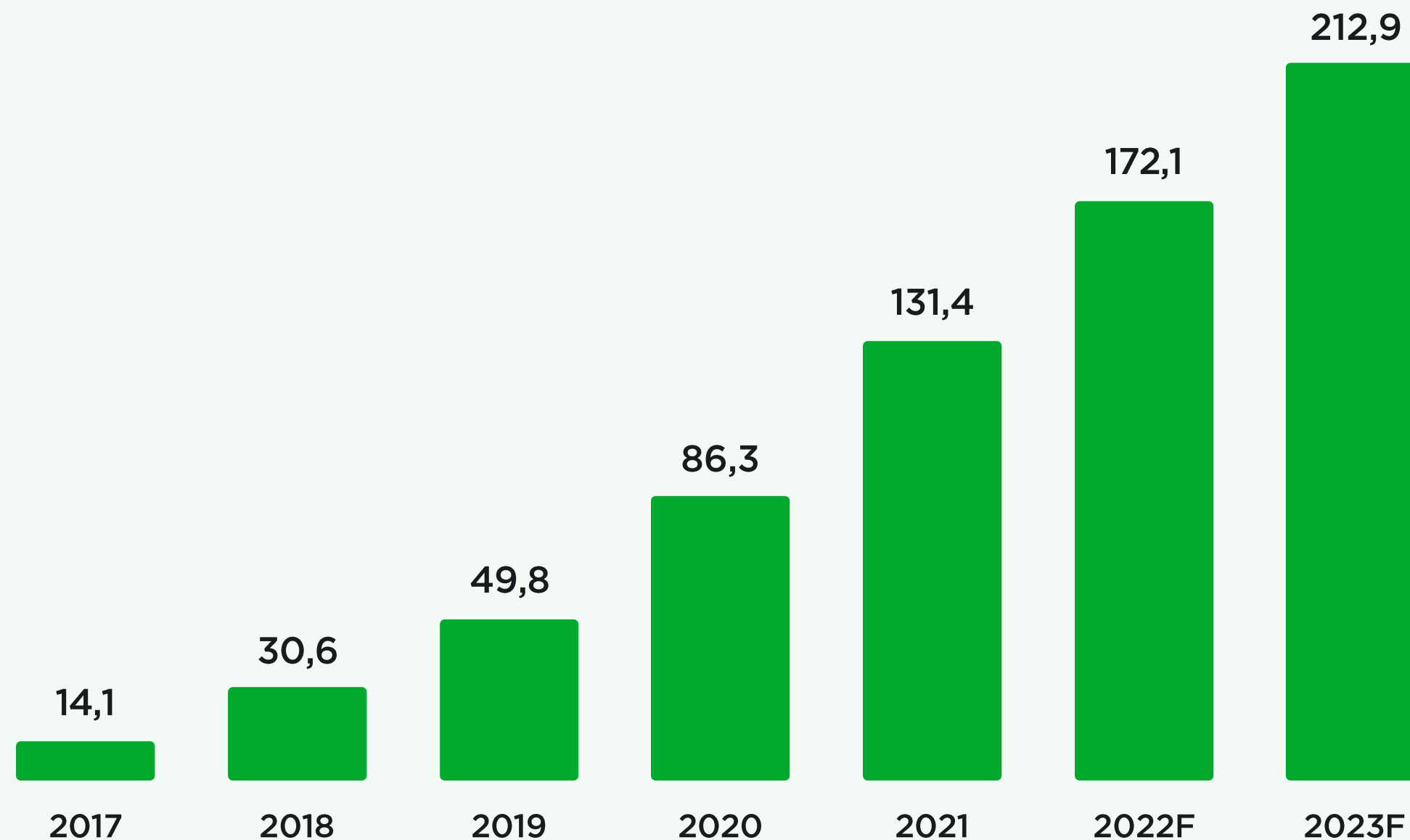
Base: Representative sample of PC and/or console gamers aged 10-50 in the United States (n=3,088)

# Consoles will be more available as semiconductors become more plentiful

Bolstered supply chains for semiconductors will let console makers increase console production, with new gaming content sustaining ongoing demand

## Cumulative Units Sold\*

Nintendo Switch, PlayStation 5, Xbox Series S|X



\* Based on a combination of Newzoo estimates and official shipment figures from company financials

- Global supply chain challenges, specifically a shortage of semi-conductors, led to the unavailability in current-gen consoles (PS5 and Xbox Series X|S) for gamers.
- Many of the supply chain issues in the games market have been resolved or are en route to resolution. Devices like the PS5 will be more available to consumers going into 2023.
- The supply is catching up with demand, and even increasing hardware prices, communicated due to inflation, do not stop gamers from buying the popular devices. An economic downturn might dampen the effect.
- The cumulative units sold for the aggregate of Nintendo Switch, PlayStation 5, and Xbox Series X|S will grow to an estimated 208 million at the end of 2023.
- After two years with sparse content due to delays across many studios, the supply of content is set to be much larger in 2023.

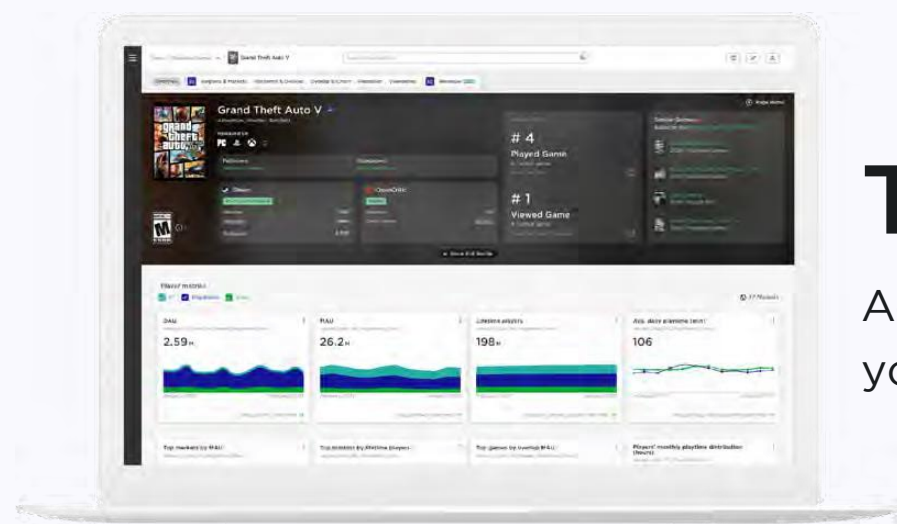
# 2023 will be a strong growth year for the PC & console market

Console gaming will be an especially powerful force in the market

## Global PC and Console Gaming Revenues | 2020 - 2025F

2023F - 2025F values indexed using 2022F as base number





# The Newzoo Platform

Access data on the entire games market and build your own research using one seamless platform.

## Know the Games

 GAMES DATA

### Game Performance Monitor

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



## Know the Gamers

 GAMER RESEARCH

### Global Gamer Study

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



### Game Health Tracker

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



## Know the Market

 MARKET ANALYSIS & CONSULTING

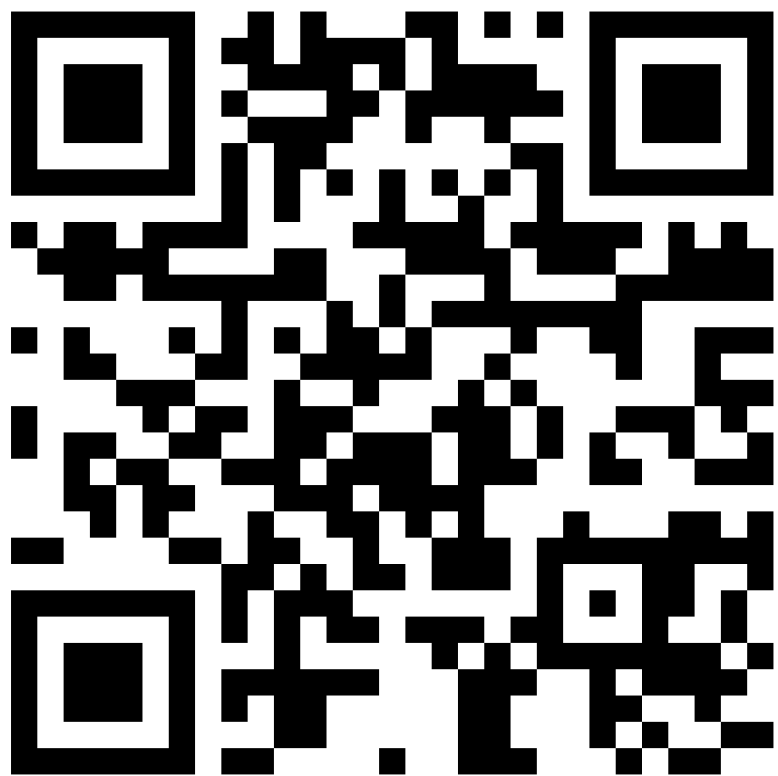
### Market Reports & Forecasts

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





Scan to download the  
PC & Console Gaming Report 2023



# Thank you!

## Any Questions?