REPORT ABSTRACT

Next-Generation Cloud Gaming Market Report - 2019

New technologies, new market entrants and new business models

Piers Harding-Rolls, Director, Head of Games Research

A comprehensive analysis of the cloud gaming market and industry landscape, this ground-breaking report examines the next wave of industry interest in cloud gaming and its market potential over the next five years.

The cloud gaming market has burst into life again in recent months. The news that Google, Microsoft, Tencent and others are entering this market underlines that cloud, working as a platform and offering games-related services, is the new competitive platform dynamic within the games industry. We refer to this next wave of interest in this segment as next-generation cloud gaming.

This detailed report examines the emerging dynamics of the cloud gaming market and industry landscape. It identifies which companies are best positioned to compete and how the market will perform over the next five years on a country and regional level, and which monetisation models are likely to succeed.

IHS Markit divides the cloud gaming market into two distinct service types: content-based services and gaming PC services where consumers bring their own games to a rented cloud PC. The report delves into the dynamic of these opportunities and compares the performance of all 16 active services operating in the market at the end of 2018.

The research includes a 98 page PDF report and a database of market data and forecasts.

Highlights:

- Cloud as a platform is the next major battleground for the biggest games companies
- Cloud gaming services are better placed to make an impact on the market in 2019 than at any time previously
- The cloud gaming content and cloud gaming PC services markets were worth a combined $387 million in 2018. This is forecast to grow to $2.5 billion in 2023
- Competitivity in cloud gaming services will revolve around two key areas: infrastructure and content
- Telcos are making a strong play for a role in the cloud gaming market, primarily to push new 5G products and services
- Cloud gaming services will slowly increase their potential audience as next-generation fixed and mobile broadband is adopted. 5G will start to make a more significant impact on adoption from 2022 onwards
- New competitive front means opportunities for content owners

ACTUALS AND FORECAST

Frequency, Time Period
- 5-year annual forecast (2019 - 2023)
- Base year (2017)

Measures
- Addressable audience
- Consumer spend by monetisation model

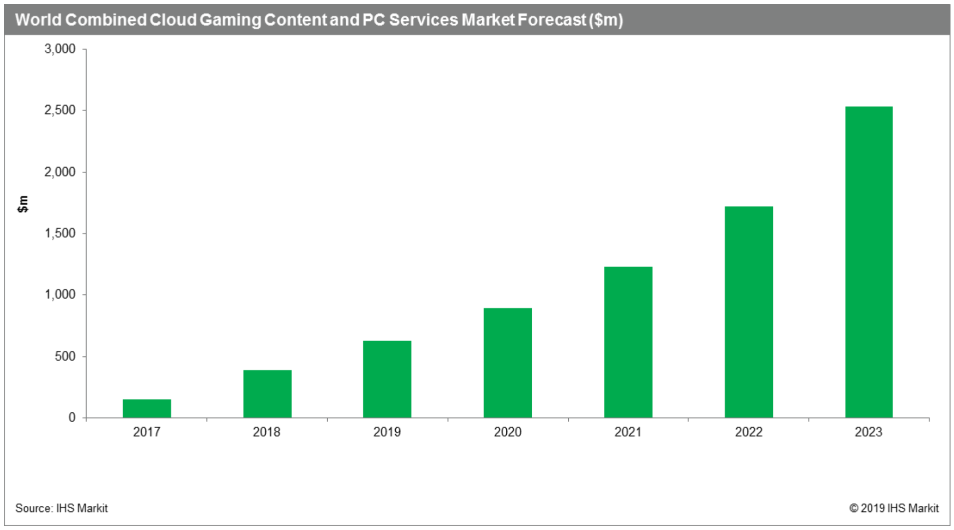
Regions, Markets
- 49 country markets
- All regions

Market share analysis for each major:
- Cloud gaming segment
- Monetisation model
- Country market/regional market
- Cloud gaming content and cloud gaming PC service operator

VERTICAL MARKETS COVERED
- Games
- Telecommunications
- Internet
- Consumer electronics

TECHNOLOGIES COVERED
- Cloud gaming technology
- Cloud gaming services
- Cloud infrastructure
- 5G
- Edge computing

KEY TRANSFORMATIONS DRIVING CHANGE
- Next-generation internet networks including 5G
- Cloud service providers building cloud gaming services
- Adoption of hybrid monetisation models to drive commercial viability
- Adjacent market entrants seeking to grow exposure to the lucrative games value chain
- Rise in popularity of games subscription services



Key Issues Addressed

- How big is the cloud gaming market today?
- What is the growth potential of the market over the next five years?
- Which country markets offer the biggest opportunity for cloud gaming content services?
- Who operates in the cloud gaming market today?
- Which operators have the biggest market share?
- Which types of company are best placed to dominate the cloud gaming opportunity?
- How will the industry landscape change over the next few years?
- What opportunities does cloud gaming offer to content owners?
- How will 5G impact service adoption?
- How well are telcos positioned to take advantage of the cloud gaming market?

Applicable To

- Gain market understanding
- Identify growth opportunities
- Gain a detailed understanding of the competitive industry landscape and how it is likely to evolve
- Understand the trends that will drive future changes in cloud gaming
- Understand the industry drivers and dynamics that will lead to changes in the games sector

LEAD ANALYST

Piers Harding-Rolls – Director, Head of Games Research

Piers leads research and analysis of the $128 billion games market at IHS Markit. He is also lead analyst across the immersive computing technologies of virtual and augmented reality.

As head of games research, Piers leads a global team of analysts tracking the evolution of the games sector across all major channels, platforms and monetisation models. This team produces the class-leading Games Intelligence research products. He is an acknowledged expert in the market transition from physical media to digital games opportunities.

ABOUT IHS MARKIT GAMES INDUSTRY AND MARKET RESEARCH

Comprehensive coverage of the games sector, providing ongoing access to a continuous flow of research across geographies, topics and platforms. Coverage includes a tactical by-territory view of games content and games hardware opportunities by each and every segment of the market with industry competitive dynamics including: company and title performance, content pricing, funding and acquisition analysis.

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Charts, tables and diagrams

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